



CLOUDBLUE

Service Description

MANAGED SERVICES

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CloudBlue[™]

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MANAGED SERVICES - SERVICE DESCRIPTION

This Managed Services Description (“**Service Description**”) describes Managed Services (“**Service**”). All capitalized terms in this description have the meaning ascribed to them in the Agreement (defined below) or in the Definitions section. This Service Description, with any attachments included by reference, is part of and incorporated into Customer’s signed agreement with Ingram Micro which governs the use of the Service, (herein after referred to as the “Agreement”).

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1. Managed Platform Services

1.1 Service(s) Overview

Managed Services are a value-added support services that can be configured to meet the discrete needs of Customer that combine personalized proactive services with expedited response to minimize Customer IT risk and maximize uptime.

The Managed Platform Services Offerings Chart, contained in this Service Description, details certain information and attributes associated with each of the Service(s).

In addition to those services features identified in the Service(s) Offerings Chart, the following service features apply to all the Service(s).

- a. Managed Services Operations Manual. The Operations Manual, which is developed during the service activation period, provides further description of the Service(s), and details additional Customer responsibilities which may be applicable to the Service(s).
- b. Managed Services Engagement Manual. The Engagement Manual, which is developed after the Service Activation period, provides a general account plan with the contact points of both parties as well as the outcome-based objectives of the business.

The services under Managed Platform Services are broken down into the following categories:

Account Management	Core	Select	Advanced	Premier
Single Point of Contact	■	■	■	■
Annual Account Review (Remote)	■	■	■	■
Service Reporting	■	■	■	■
Quarterly Account Reviews (Remote)		■	■	■
Business Continuity Planning (Annual)			■	■
Local Service Delivery Manager				■
Reporting	Core	Select	Advanced	Premier
Proactive trends	■	■	■	■
Historical trending for root cause	■	■	■	■
Capacity management	■	■	■	■
Incident Management	■	■	■	■
Performance Management	■	■	■	■
Escalation Management	Core	Select	Advanced	Premier
Assignment to Duty Manager	■	■	■	■
Case Creation on Behalf of Customer	■	■	■	■
Support Coverage	Core	Select	Advanced	Premier
Priority Queuing	■	■	■	■
Access to advanced engineers	■	■	■	■
24x7 Incident Logging & Support (Level 2/3)	■	■	■	■
Delivery Executive Access			■	■
Proactive Platform Services	Core	Select	Advanced	Premier

Syndication Management	■	■	■	■
Configuration & Optimization Assistance	■	■	■	■
Platform Health-Check Service (Quarterly)	■	■	■	■
Platform Sizing / Planning (Quarterly)	■	■	■	■
Platform Monitoring Services	■	■	■	■
Commerce Engine Management	Core	Select	Advanced	Premier
Marketplace Management	Optional Extra	Select any Four Options	Select any Six Options	All Options Included
Workflow Management	Optional Extra			
Provisioning & Resource Management	Optional Extra			
Order Management	Optional Extra			
Subscription Management	Optional Extra			
Reseller & Omni-Channel Management	Optional Extra			
Billing & Invoicing Management	Optional Extra			
Identify & Access Management	Optional Extra			
Upgrade Planning	Core	Select	Advanced	Premier
Patch and Fix Updates	■	■	■	■
Upgrade Assistance	■	■	■	■
Optional Services	Core	Select	Advanced	Premier
Additional Country Management	Optional Extra	Optional Extra	Optional Extra	Optional Extra
Additional Service Plans Support	Optional Extra	Optional Extra	Optional Extra	Optional Extra
QuickStart Connector Setup	Optional Extra	Optional Extra	Optional Extra	Optional Extra
Custom Connector Support	Optional Extra	Optional Extra	Optional Extra	Optional Extra

Managed Platform Services Offerings Chart

1.2 Managed Platform – Core Service

The Services provided within the Managed Platform – Core Service includes the following:

- a. Account Management
 - i. Single Point of Contact
 - ii. Annual Account Review (Remote)
- b. Service Reporting:
 - i. Proactive trends for predictive/preventative actions
 - ii. Historical trending for root cause
 - iii. Capacity management
 - iv. Incident Management
 - v. Performance Management
- c. Escalation Management
 - i. Assignment to Duty Manager
 - ii. Case Creation on Behalf of Customer
- d. Support Coverage
 - i. Priority Queuing
 - ii. Access to advanced engineers
 - iii. 24x7 Incident Logging & Support (Level 2/3)
- e. Proactive Platform Services
 - i. Syndication Management
 - ii. Configuration & Optimization Assistance
 - iii. Platform Health-Check Service (Quarterly)
 - iv. Sizing and Platform Planning (Quarterly)
 - v. Platform Monitoring Services
- f. Upgrade Planning
 - i. Patch and Fix Updates
 - ii. Upgrade Assistance
- g. Commerce Engine Management add-on may be added to this offering but priced separately
- h. Optional Services may be added to this offering but priced separately

1.3 Managed Platform – Select Service

The Services provided within the Managed Platform – Select Service includes the following:

- a. Account Management
 - i. Single Point of Contact
 - ii. Annual Account Review (Remote)
 - iii. Quarterly Account Reviews (Remote)
- b. Service Reporting:
 - i. Proactive trends for predictive/preventative actions
 - ii. Historical trending for root cause
 - iii. Capacity management
 - iv. Incident Management
 - v. Performance Management
- c. Escalation Management
 - i. Assignment to Duty Manager
 - ii. Case Creation on Behalf of Customer
- d. Support Coverage
 - i. Priority Queuing
 - ii. Access to advanced engineers
 - iii. 24x7 Incident Logging & Support (Level 2/3)
- e. Proactive Platform Services
 - i. Syndication Management
 - ii. Configuration & Optimization Assistance
 - iii. Platform Health-Check Service (Quarterly)
 - iv. Sizing and Platform Planning (Quarterly)
 - v. Platform Monitoring Services
- f. Upgrade Planning
 - i. Patch and Fix Updates
 - ii. Upgrade Assistance
- g. Any four (4) Commerce Engine Management add-ons may be added to this offering
- h. Optional Services may be added to this offering but priced separately

1.4 Managed Platform – Advanced Service

The Services provided within the Managed Platform – Advanced Service include the following:

- a. Account Management
 - i. Single Point of Contact
 - ii. Annual Account Review (Remote)
 - iii. Quarterly Account Reviews (Remote)
 - iv. Business Continuity Planning (Annual)
- b. Service Reporting:
 - i. Proactive trends for predictive/preventative actions
 - ii. Historical trending for root cause
 - iii. Capacity management
 - iv. Incident Management
 - v. Performance Management
- c. Escalation Management
 - i. Assignment to Duty Manager
 - ii. Case Creation on Behalf of Customer
- d. Support Coverage
 - i. Priority Queuing
 - ii. Access to advanced engineers
 - iii. 24x7 Incident Logging & Support (Level 2/3)
 - iv. Delivery Executive Access
- e. Proactive Platform Services
 - i. Syndication Management
 - ii. Configuration & Optimization Assistance
 - iii. Platform Health-Check Service (Quarterly)
 - iv. Sizing and Platform Planning (Quarterly)
 - v. Platform Monitoring Services
- f. Upgrade Planning
 - i. Patch and Fix Updates
 - ii. Upgrade Assistance
- g. Any six (6) Commerce Engine Management add-ons may be added to this offering
- h. Optional Services may be added to this offering but priced separately

1.5 Managed Platform – Premier Service

The Services provided within the Managed Platform – Premier includes the following:

- a. Account Management
 - i. Single Point of Contact
 - ii. Annual Account Review (Remote)
 - iii. Quarterly Account Reviews (Remote)
 - iv. Business Continuity Planning (Annual)
 - v. Local Service Deliver Manager
- b. Service Reporting:
 - i. Proactive trends for predictive/preventative actions
 - ii. Historical trending for root cause
 - iii. Capacity management
 - iv. Incident Management
 - v. Performance Management
- c. Escalation Management
 - i. Assignment to Duty Manager
 - ii. Case Creation on Behalf of Customer
- d. Support Coverage
 - i. Priority Queuing
 - ii. Access to advanced engineers
 - iii. 24x7 Incident Logging & Support (Level 2/3)
 - iv. Delivery Executive Access
- e. Proactive Platform Services
 - i. Syndication Management
 - ii. Configuration & Optimization Assistance
 - iii. Platform Health-Check Service (Quarterly)
 - iv. Sizing and Platform Planning (Quarterly)
 - v. Platform Monitoring Services
- f. Upgrade Planning
 - i. Patch and Fix Updates
 - ii. Upgrade Assistance
- g. All eight (8) Commerce Engine Management add-ons may be added to this offering
- h. Optional Services may be added to this offering but priced separately

1.6 Commerce Engine Management Add-Ons

a. Marketplace Management

The Marketplace allows consumers to search and shop a curated catalog of products and offerings. To effectively manage the customer lifecycle, our teams help review, prepare and productize your offerings to your target customers. This service includes weekly reviews of your product offerings and deciding an appropriate strategy for presenting them over the platform.

- i. Weekly review
- ii. For 5 SKUs / week included:
 - (a) Setup and configuration of SKUs in the platform
 - (b) Upload of marketing content for the SKUs
 - (c) Dry-run purchasing process for SKU
 - (d) Definition of trials and promotions as required
 - (e) Setup of bundles and cross sell in the system
 - (f) Review of existing product portfolio for updates or duplicates

b. Workflow Management

Ensures the end-to-end workflow and configurations are optimized to maximize the use of the system.

- i. Our experts will conduct an initial assessment of your key stakeholders in your organization, partners and reseller and customer base. The system will be configured to ensure the right decision makers are involved in the purchasing and pricing decisions. Roles and authorizations, as well as organizational entities will be setup to best scale over time, as well as comply with business rules.
- ii. Setup and optimization of workflow (annual workshop with implementation of recommended setup in system)
- iii. Assessment of as-is Processes to identify opportunities for automation
- iv. Review of system roles to ensure compliance and setup of Granular entitlement
- v. Optimization of workflow orchestration to ensure inclusion of third parties, management and other key stakeholders
- vi. Development of basic training content for key stakeholders on Operations management
- vii. Review of the end-user User lifecycle management.
- viii. Assessment of end-to end buying experience with implementation of recommended workflow configuration
- ix. On-going partner management, on-boarding of new partners into the workflow (Includes initial bulk upload, 5 partners a week)

c. Provisioning & Resource Management

Configure the storefront to optimize buying experience to align with Service Provider requirements

- i. Develops and maintenance which includes:
 - (a) Five (5) SKUs updated monthly
 - (b) Custom Pricing Strategy
 - (c) Pricing and plan modelling
 - (d) Discounting and promotional strategies

- d. **Order Management**
Provides Total Lifecycle Management (user, account, organization and order management using the advanced features in the platform including:
 - i. Daily review of cancelled orders, rejected orders
 - ii. Action on cancelled orders according to pre-determined operations manual
 - iii. Customer impact analysis – retention exposure
 - (a) Configure, price, quote (CPQ)
 - (b) Self-registration with optional approval workflow (Dedicated Platforms Only)
 - (c) Anonymous shopping and trial orders
 - (d) Support for custom fields

- e. **Subscription Management**
The subscription management engine is the core of the commercial platform, can be a powerful tool in deploying a more effective customer retention strategy including:
 - i. Weekly Review of subscriptions trends
 - ii. Trend reporting on cancelled subscriptions
 - iii. Trend reporting on revenue over billing cycles
 - iv. Trend reporting on high growth segments
 - v. Customer impact analysis – retention exposure
 - vi. On-going updates and changes of subscription plans, including configuration of
 - (a) Recurring one-time
 - (b) Pay per use or reservation (Dedicated Only)
 - (c) Definable order cycles
 - (d) Auto renew / cancel
 - (e) Variable billing periods

- f. **Reseller & Omni-Channel Management**
Enterprise organization benefit from maximizing the use of their channel and partners. Our team helps setup and effectively manage your partnership structure
 - i. Setup and optimization of channel and reseller model (annual assessment/ workshop with implementation of recommended setup in system)
 - ii. Ongoing changes to:
 - (f) Multi-level channels (with agent, resellers, distributor or wholesaler)
 - (g) Automated end-to-end order process
 - (h) Resellers create their own offers
 - (i) Discounts by offer, reseller or global
 - (j) Commission rates by agent or offer
 - iii. Re-brandable, customizable form

- g. **Billing & Invoicing Management**
 - iv. Variable billing cycles
 - v. Upgrade/ downgrade
 - vi. Metering/ rating
 - vii. Chargeback
 - viii. Contract management
 - ix. Taxation calculation

h. Identify & Access Management

Daily management of edits, changes to new users, resellers and other agents

- i. Setup and configuration of entities as required
- ii. Granular roles and rights management
- iii. Partner, resellers or agents
- iv. Hierarchical and relational entities

1.7 Managed Platform – Optional Services

The Services provided within the Managed Platform – Optional Services are available for customers with Dedicated PaaS or On-Premise Platforms only – These Services are scoped, and additional charges will apply:

- a. Additional Operating Country Management (CB-MS.MP-OP-1M)
 - i. Setup and Management per additional Operating Company (OpCo)
- b. Additional Service Plan Support (CB-MS.MP-SP-1M)

When selected following support services for the management plans and the setup of new Resellers.

 - i. Within the go-to-market configuration of the system, service provides support for beyond 100 service plan changes per month and templates. The number of service plans supported will be calculated in aggregate across all Resellers configured on the platform. Any unused service plan management activities will expire at the end of the agreed billing period.
 - ii. The support for service plans to be provided includes:
 - (a) Add New Service Plan
 - (b) Change existing service plan
 - (c) Configure the service plan name, resource rates, published setting, subscription period, plan category
 - (d) Update the subscription period and subscription fee
 - (e) Add required resources and specify the resource rates
 - (f) Add service plan to the sales category to publish on the online store
 - (g) Name the sales category and add the description
 - (h) Add required service plan to sales category
 - (i) Delegate the service plan to the Reseller
 - (j) Synchronize the service plan for the Reseller
- c. QuickStart Connector Setup (CB-MS.MP-QS-1T)

The setup and configuration of a Connector package includes, where applicable:

 - i. Installing the package
 - ii. Configuring Connector instance by creating the resource type as defined in the Connector Catalog
 - iii. Create Service Template as per the recommendation provided in the Connector documentation.
 - iv. Creation a set of service plans for product offerings, as per the recommendation provided in the Connector documentation.
 - v. Publishing the Connector package to online store
 - vi. Test Provisioning
 - vii. Quality Assurance
 - viii. Providing specifications for server(s) required to support the endpoint at customer's Service Automation environment
 - ix. Configuring the endpoint server
- d. Connector Package Support (CB-MS.MP-CC-1M)

The optional services for supporting a Connector package includes:

- i. Ensure that ISV software maintenance releases or patches are applied provided that the ISV has notified Ingram Micro of any such maintenance release or patch.
- ii. Ensure that ISV software maintenance releases or patches that address urgent or high-risk security issues are applied as soon as possible provided that Customer approval has not been withheld
- iii. Provide reports to assist in the management and maintenance of compliance with licenses or agreements for the use of ISV software.

2. Service Activation:

Ingram Micro will activate the Services and provide the following deliverables including, among other items:

- a. Provide an Operations Manual within thirty (30) Days of the SoW Effective Date.
- b. Provide Service Reporting thirty (30) days after Service Activation.

3. Service limitations:

- a. Except as the Parties may otherwise agree in writing, Ingram Micro will perform the Services remotely from Ingram Micro or Ingram Micro's subcontractors' or other third parties' facilities. Each Party agrees to make available all reasonably necessary resources to enable Ingram Micro to perform the Services.
- b. Unless otherwise specified, the Parties acknowledge that any on-site Services are intended to be performed during Normal Work Hours. Normal Work Hours do not include weekends, public holidays (observed in the country in which Services are performed), or hours between 7 a.m. and 7 p.m. local time. Support outside of Normal Work Hours is available on an on-call basis.
- c. This service is applicable for platforms with a Staging and Production environments. Additional environments may attract an additional small fee.
- d. This service is applicable for Shared PaaS, Dedicated PaaS, or Dedicated On-Premise platform environments.

4. Service Exclusions:

- a. Custom software development
- b. Implementation, configuration or operations of 3rd party systems or software except listed in the SoW
- c. Physical Datacenter related activities, such as Implementation, testing and/or fixing of network equipment, servers, power units or cables.

5. SKU List:

The following table defines SKUs and metrics used in this document.

Standard Services	SKU #	Metric	Notes
Managed Platform – Service Activation	CB-MS.MP-SA-1T	One-Time	
Managed Platform – Core Service	CB-MS.MP-CO-1M	Monthly	
Managed Platform – Select Service	CB-MS.MP-SE-1M	Monthly	
Managed Platform – Advanced Service	CB-MS.MP-AD-1M	Monthly	
Managed Platform – Premier Service	CB-MS.MP-PR-1M	Monthly	
Optional Services	SKU #	Metric	Notes
Additional Operating Country Management	CB-MS.MP-OP-1M	Monthly	
Additional Service Plan Support	CB-MS.MP-SP-1M	One-Time	
QuickStart Connector Setup	CB-MS.MP-QS-1T	One-Time	
Custom Connector Package Support	CB-MS.MP-CC-1M	Monthly	
Commerce Engine Addons	SKU #	Metric	Notes
Marketplace Management	CB-MS.CE-MM-1M	Monthly	
Workflow Management	CB-MS.CE-SC-1M	Monthly	
Provisioning & Resource Management	CB-MS.CE-RP-1M	Monthly	
Order Management	CB-MS.CE-OM-1M	Monthly	
Subscription Management	CB-MS.CE-SM-1M	Monthly	
Reseller & Omni-Channel Management	CB-MS.CE-RO-1M	Monthly	
Billing & Invoicing Management	CB-MS.CE-BI-1M	Monthly	
Identity & Access Management	CB-MS.CE-IA-1M	Monthly	

6. Definitions:

Capitalized terms used in this Service Description, and not otherwise defined in the Agreement, have the meaning given below.

Capitalized term	Description
Dedicated PaaS	A dedicated platform environment setup, hosted, and managed by Ingram Micro on behalf of the customer in a specific geographical zone.
Operating Country	An Operating Country, generally Ingram Micro supports a single country, with additional Operating Countries added to the platform for an additional fee.
On-Premise	A dedicated platform environment setup, hosted, and managed by the customer, and hosted by a third-party or in their own Data Center facility.
Production Environment	A revenue-generating production platform environment
Shared PaaS	A shared platform environment setup, hosted, and managed by Ingram Micro on behalf of the customer in a specific geographical zone.
Staging Environment	A non-production, non-revenue-generating environment used by developers to model impacts to the Customer environment or test upgrades.
Operating Country	An Operating Country, generally Ingram Micro supports a single country, with additional Operating Countries added to the platform for an additional fee.