

  
**CloudBlue**<sup>™</sup>

Service Description

## **PROFESSIONAL SERVICES**

*1<sup>st</sup> May 2020*

This Professional Services Description (“**Service Description**”) describes Professional 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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# CONTENTS

<b>CONTENTS .....</b>	<b>2</b>
<b>1. PROFESSIONAL SERVICES .....</b>	<b>3</b>
1.1 SERVICE(S) OVERVIEW .....	3
1.2 SERVICE DELIVERY MANAGEMENT .....	3
1.3 ACCOUNT MANAGEMENT .....	3
1.4 ESCALATION MANAGEMENT .....	4
1.5 PRODUCT LIFECYCLE MANAGEMENT .....	4
<b>2. DEPLOYMENT SOLUTIONS .....</b>	<b>5</b>
2.2 SKU LIST .....	6
2.3 IMPLEMENTATION SOLUTIONS OVERVIEW .....	7
2.4 CLOUDBLUE COMMERCE DEPLOYMENT .....	8
2.5 CLOUDBLUE CONNECT PROVIDER SETUP .....	10
2.6 CLOUDBLUE CONNECT AND COMMERCE RESELLER SETUP .....	12
2.7 CLOUDBLUE CONNECT CONNECTOR DEPLOYMENT .....	13
2.8 SYNDICATION PRODUCT SETUP (CLOUDBLUE CONNECT BASED) .....	14
2.9 SYNDICATION PRODUCT SETUP (CLOUDBLUE HOSTED BACKEND) .....	15
2.10 PLUG-IN DEPLOYMENT .....	16
2.11 CONFIGURATION .....	17
2.12 MIGRATION SOLUTIONS OVERVIEW .....	18
2.13 MIGRATION SOLUTIONS .....	19
2.14 ADVANCED UPGRADE ASSISTANCE .....	21
2.15 BILLING VALIDATION .....	23
2.16 SELF-DEPLOYED CLOUDBLUE CONNECT CONNECTOR VALIDATION & CERTIFICATION .....	25
2.17 GO-TO-MARKET AUTOMATOR SETUP .....	26
2.18 GO-TO-MARKET BUILDER SETUP .....	27
2.19 GO-TO-MARKET AUTOMATOR SSO SETUP .....	28
2.20 VALUE ADDED RESELLER SETUP .....	29
2.21 SERVICE PLAN SETUP .....	30
2.22 STANDALONE APS CONNECTOR DEPLOYMENT .....	31
2.23 APS CONTROLLER PROXY DEPLOYMENT .....	32
2.24 WEBHOSTING PLESK DEPLOYMENT .....	33
2.25 HOSTED SERVICES ADDITIONAL SERVER DEPLOYMENT .....	34
2.26 INTEGRATION SOLUTIONS OVERVIEW .....	35
2.27 INTEGRATION DEVELOPMENT .....	35
2.28 INTEGRATION MAINTENANCE .....	36
2.29 PLATFORM FUNCTIONALITY ACCELERATED DEVELOPMENT .....	37
2.30 LOCALIZATION DEVELOPMENT .....	38
2.31 LOCALIZATION MAINTENANCE .....	38
<b>3. EDUCATION SOLUTIONS .....</b>	<b>39</b>
3.1 DIGITAL TRAINING .....	39
3.2 VIRTUAL INSTRUCTOR-LED TRAINING .....	39
3.3 ONSITE INSTRUCTOR-LED TRAINING .....	40
3.4 SOLUTION(S) OVERVIEW .....	40
3.5 SERVICE ACTIVATION .....	41
3.6 SERVICE LIMITATIONS .....	41
3.7 SERVICE EXCLUSIONS .....	43
3.8 SKU LIST .....	44
<b>4. DEFINITIONS .....</b>	<b>45</b>

# 1. PROFESSIONAL SERVICES

## 1.1 SERVICE(S) OVERVIEW

Professional Services are 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.

CloudBlue are passionate about driving value out of IT through our innovative Professional Service offerings. Our solutions leverage creativity to deliver value to your business. ITIL methodologies underpin all our Professional Service solutions. We start by understanding your business and its objectives. Our customers experience high returns from their IT spend since we align the services we provide with their objectives. Choose from either Deployment Solutions or Education Solutions to get the appropriate service for your needs.

CloudBlue provides a range of “Professional Services” solutions are designed to bring value back into your business.

Our Professional Services offerings are broken down into two groups;

- a. Deployment Solutions
- b. Education Solutions

## 1.2 SERVICE DELIVERY MANAGEMENT

Service Delivery Management is about providing solutions to the core issues of technology customer portfolio. The long-range vision of Service Delivery Management is an integration of technology, Managed Services, and Professional Services into a relationship product for the SaaS/Cloud era. The day of the traditional perception of a cloud platform with its historically tactical methods of packaging and distribution, has passed. We are entering the era of “More as a Service”

The ultimate strategic goal of the Service Delivery Management role is assisting our customers with sustainable profitability and growth. As economies become predominantly service-based, companies increasingly derive revenue from the creation and sustenance of long-term relationships with their end-user customers. In such an environment, marketing serves the purpose of maximizing Customer Lifetime Value (CLV) and customer equity, which is the sum of the lifetime values of the customers. CloudBlue Services are rapidly evolving towards a subscription driven services model. Service Delivery Managers will become an integral part of your success of this evolution.

As part this evolution a new role from our CloudBlue Services, called Service Delivery Managers (SDM) that will be provided as part of a new set of service offerings delivered based on customer size/revenue.

Put simply, the key concept of Service Delivery Management is to ensure ever-increasing customer adoption of CloudBlue products and services, help your drive your end-user customer retention, and reduce or eliminate churn. Service Delivery Management is the function responsible for managing the technical and business relationships between CloudBlue and our customers with the intent of:

- a. Maximizing the value that our customers derive from the solutions they acquired from CloudBlue by making them as cost-effective and productive as possible, and,
- b. Maximizing the value, our customers can in turn create from their own customers, resulting in sustainable corporate good profits and growth.

## 1.3 ACCOUNT MANAGEMENT

All customers will be assigned a named SDM who will serve as their primary contact for providing Service Delivery Management services.

Reviews with customers differ in a few ways;

- a. First, in almost all cases, reviews and discussions occur remotely (by telephone). Our Operational Solutions; Advanced and Premier tiers also offer an annual review (based upon the customer’s preference); Premier also offers an optional quarterly onsite review.

- b. For the quarterly and annual reviews, these are intended to be more summary in nature. To that extent, historical trends are examined and how they might impact future results, areas for improvement, etc.
- c. Monthly reviews provide more detail on the specific activity.

#### **1.4 ESCALATION MANAGEMENT**

The SDM will be available to their customers during local business hours. As needed, they will assist with any support issue escalations on behalf of their customer. They will also provide an update on the status of a customer's escalated case and maintain a current plan of action.

#### **1.5 PRODUCT LIFECYCLE MANAGEMENT**

For all Professional Services, the SDM will notify their customer if bug fixes or patches become available for their products. As one of the proactive services available and will coordinated with internal CloudBlue delivery teams to provide upgrade plan and recommendations for upgrade of deployed software from one supported version to another.

Coordinated through the SDM, CloudBlue will provide a personalized analysis of a customer's deployed software configuration and the current state of the environment, outlining deviations from CloudBlue recommended practices, including the potential impact and advice on remediation options for the customer to take.

It is important that all services are provided against the CloudBlue Lifecycle Policy see the <https://www.cloudblue.com/general-cloudblue-lifecycle-policy/>

## 2. DEPLOYMENT SOLUTIONS

CloudBlue Deployment Solutions are based on proven, repeatable success at every step of the solution that is aligned to a customer’s specific functionality or configuration. Deployment Solutions follow a standard project management delivery methodology.

**Project Management:** CloudBlue will assign a resource to manage Deployment Solutions and will provide Customer with the name and contact information of such project manager following CloudBlue’s receipt of the signed SoW. If provided, project management includes the following:

- a. Project planning, including report writing (status reports, meeting minutes etc.), establishing the project team and definition of roles and responsibilities, project structure, deadlines, progress review of phases, project controlling, preparing and conducting transition to managed service, and setting criteria for completion of the services.
- b. Change-Order Management, error logging, risk management and development of alternative strategies.

**Milestones (phases):** The approach is to simplify the milestones for billing and are also referred to as groupings or project phases that have specific tasks. Delivery of the deployment project will be performed in a series of these phases and tracked and aligned to payment milestones consisting of deliverables, prerequisites, assumptions and exclusions as set forth below. Before proceeding from one phase to the next, Customer must provide acceptance of the Deliverables, if any, applicable to the completed phase. Acceptance may not be unreasonably conditioned, withheld or delayed.

Implementation Solutions	Integration Solutions	Migration Solutions
Install Milestone 50%	Design Milestone 50%	Prepare Milestone 50%
Configure Milestone 25%	Build Milestone 25%	Import Milestone 25%
Verify Milestone 25%	Accept Milestone 25%	Validate Milestone 25%

**Exclusions: The following services are out of scope of Deployment Solutions;**

- a. Analysis and design of any items not explicitly outlined;
- b. Development of any items not explicitly outlined; and
- c. Deployment of any items not explicitly outlined.

## 2.2 SKU LIST

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

Description	SKU #	Metric
CloudBlue Commerce Deployment	CB-DEP.CBD-SETUP-1T	One-Time Charge
CloudBlue Connect Provider Setup	CB-DEP.CONN-SETUP-OA-1T	One-Time Charge
CloudBlue Connect and CloudBlue Commerce Reseller Setup	CB-DEP.CONN-SETUP-OARS-1T	One-Time Charge
CloudBlue Connect Connector Deployment	CB-DEP.OA-CNCT-1T	One-Time Charge
Syndication Product Setup (CloudBlue Connect based)	CB-DEP.OA-SYND-CONN-1T	One-Time Charge
Syndication Product Setup (Ingram Micro hosted backend)	CB-DEP.OA-SYND2-1T	One-Time Charge
Plug-in Deployment	CB-DEP.OA-PG-1T	One-Time Charge
Configuration	CB-DEP.CBS-PC-1T	One-Time Charge
Migration	CB-DEP.MIGRATE-1T	One-Time Charge
Advanced Upgrade Assistance	CB-DEP.UPGRADE-1T	One-Time Charge
Billing Validation	CB-DEP.CBSP-BV-1T	One-Time Charge
Self-Deployed CloudBlue Connect Connector Validation and Certification	CB-DEP.OA-SDCCVC-1T	One-Time Charge
Go-to-Market Automator Setup	CB-DEP.GTMA-1T	One-Time Charge
Go-to-Market Builder Setup	CB-DEP.GTMA-B-1T	One-Time Charge
Go-to-Market Automator SSO Setup	CB-DEP.GTMA-SSO-1T	One-Time Charge
Value Added Reseller Setup	CB-DEP.OA-VAR-1T	One-Time Charge
Service Plan Setup	CB-DEP.OA-SP-1T	One-Time Charge
Standalone APS Connector Deployment	CB-DEP.OA-CNCT-ST-1T	One-Time Charge
APS Controller Proxy Deployment	CB-DEP.OA-APSC-1T	One-Time Charge
WebHosting Plesk Deployment	CB-DEP.OA-WHP-ST-1T	One-Time Charge
Hosted Services Additional Server Deployment	CB-DEP.OA-HS-A-1T	One-Time Charge
Integration Development	CB-DEP.INTGR-1T	One-Time Charge
Integration Maintenance	CB-DEP.INTGR-MNT-1Y	Annual Charge
Platform Functionality Accelerated Development	CB-DEP.BLD-AD-1T	One-Time Charge
Localization Development	CB-DEP.LOCALIZE-1T	One-Time Charge
Localization Maintenance	CB-DEP.LOCALIZE-MNT-1Y	Annual Charge

## 2.3 IMPLEMENTATION SOLUTIONS OVERVIEW

Utilizing CloudBlue experience and ecommerce platform knowledge, our Solution Architects spend time working with the customer's team to understand both the initial needs of the CloudBlue platform and business operations as well as intended future goals.

As part of a thorough needs analysis, a Solution Design Document captures the necessary requirements for a proper configuration of the platform.

Our Implementation Engineers, Architects, and Cloud Professionals are the heart of our business. When you work with CloudBlue, you get access to a deep bench of cloud experts for the set up and optimization and delivering a finished platform that meets your unique business needs ready for use.

Implementation help clients to rapidly achieve the business goals for utilizing cloud strategy. We will help with planning, build, quality validation & verification, and support.

## 2.4 CLOUDBLUE COMMERCE DEPLOYMENT

This offering is based on three phases to complete the delivery of the CloudBlue platform.

### 2.4.1 Install Phase

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of the platform. The tasks include the following:

- a. Create cloud infrastructure for the staging and production environments – Resource Group, Virtual Machines, Network Security Groups, IP Addresses, Virtual Networks, Storage, Backup Services, Azure Log Analyzer, VPN Gateway, Azure Firewall and Azure Kubernetes Services;
- b. Deploy a standardized CloudBlue for Service Provider platform of an agreed size (small/medium/large/XL) for both staging and production environments including the core platform modules and Marketplace;
- c. Deploy a standard set of native modules and plug-ins for the platform - including but not limited to UX1, Marketplace, REST API, XML-RPC API, APS Controller Proxy for CloudBlue Connect and Rated Data Export (RDE) for exporting billable data from the platform;
- d. Deploy additional modules for the platform as required;
- e. Deploy standardized Reseller tenant templates for staging and production environments;
- f. Deploy a standardized configuration of the core platform modules, Marketplace, Rated Data Export, reports, notification templates and order flows;
- g. Deploy default branding for the platform Reseller tenants and Marketplace;
- h. Deploy a standardized default product catalogue / SKUs for the standard set of modules;
- i. Deploy a standardized monitoring solution.

### 2.4.2 Configure Phase

The purpose of this phase is to perform necessary Platform configuration for the customer. The tasks include the following:

- a. Create pre-work documents capturing the required business configuration of the product catalogue, Marketplace, order flows;
- b. Configure standard modules of the CloudBlue for Service Provider platform;
- c. Deploy the business configuration of the platform to the staging system. Production system configuration is to be deployed when the staging system configuration passes User Acceptance Testing;
- d. Set up the technical configuration of the platform – SSL certificates, SMTP server settings, SFTP setup for Rated Data Export (if required);
- e. Upload Reseller-specific branding and localization for the platform tenants, customer notifications and Marketplace in the staging environment;
- f. Create a Sales Channel/Reseller/Operating Company configuration;
- g. Collaborate and iterate on pre-work documents and the business configuration of the staging system.

### 2.4.3 Verify Phase

The purpose of this phase is to assist the Customer with the User Acceptance Testing (UAT) and business cutover preparations and to obtain a sign-off on the UAT completion and the business cutover readiness. Also, the services organization will work with the Customer to support business cutover activities to the Platform and will work together with the Customer and the Managed Services team for the handover of ongoing Platform support. The tasks include the following:

- a. Perform unit testing of deployed modules and infrastructure configuration;



## Service Description | Professional Services

- b. Perform testing of customer ordering, upgrade/downgrade and cancellation scenarios on the staging system;
- c. Perform a guided walkthrough for primary business scenarios for the Customer staff;
- d. Provide test support for User Acceptance Testing;
- e. Track, manage, report on, collaborate on and resolve defects;
- f. Obtain customer acceptance for the staging environment configuration to graduate to production;
- g. Replicate the approved staging system configuration to the production system – including the modules, product catalogue, Marketplace configuration, order flows, branding for the platform tenants and Marketplace, Rated Data Export configuration and customer notification templates;
- h. Hand over to the Customer Operations team and CloudBlue Managed Services (optional)
- i. Provide support for production verification testing and assist with resolving issues.

## 2.5 CLOUDBLUE CONNECT PROVIDER SETUP

This offering is based on three phases to complete the delivery of the setup of CloudBlue Connect. The CloudBlue Connect Provider Setup offering enables customers to use the CloudBlue Connect platform to offer CloudBlue Connect-based products in the customer's CloudBlue platform environments. CloudBlue Connect allows Providers to brand (white label) various aspects of its portals.

### 2.5.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful setup of CloudBlue Connect, as follows:

- a. Deployment of inbound and outbound proxies to communicate with CloudBlue Connect - in customer's staging and production platform environments;
- b. Setup of monitoring for the integration of Customer's platform environments with CloudBlue Connect – in the context of the existing CloudBlue-managed monitoring system (in case such system is already deployed and managed by CloudBlue);
- c. Portals Branding. Different portals of CloudBlue Connect (Vendor Portal, Provider Portal and Customer Activation Screens) support branding. In order to setup branding within CloudBlue Connect, there is pre-work that needs to be provided by the Customer. The information that is to be gathered for Branding includes the following attributes:
  - I. Email Notifications Branding – CloudBlue Connect sends in multiple cases emails to different actors, for example when a vendor receives a new request, CloudBlue Connect may send him a notification;
  - II. User Agreement Branding – CloudBlue Connect may enforce the acceptance of a user agreement each time that a user is enrolled on any of its portals. This enrolment may happen due to the creation of new vendors accounts, or due an existing vendor invites a new user to his account. The user will need to supply its contact data and agree with the agreement that may be referenced from an external source;
  - III. Help Portal Branding - Providers have an option to either deploy branded help portal or redirect users to any external URL managed externally; and
  - IV. Support Portal Branding - Providers have an option to either deploy branded support portal experience (managed by CloudBlue staff) or redirect users to any external URL of the ticketing system, managed externally.

### 2.5.2 Configure Milestone

The purpose of this phase is to perform necessary configuration for the setup of CloudBlue Connect, including:

- a. Addition of a CloudBlue Connect Service Provider Portal tenancy;
- b. Addition of a CloudBlue Connect Vendor Portal tenancy (optional);
- c. Registration of customer's platform environments in CloudBlue Connect;
- d. Deployment of a test CloudBlue Connect APS package to Customer's platform environments for integration validation purposes; and
- e. Hand-over to Customer Operations team and CloudBlue Managed Services (optional).

### 2.5.3 Verify Milestone

The purpose of this phase is to verify that the CloudBlue Connect integration is functioning by doing the following:

- a. Validation unit testing of the deployed components and configuration;
- b. Testing of Customer ordering, upgrade/downgrade and cancellation scenarios using the test CloudBlue Connect APS package;

- c. Guided walkthrough for primary business scenarios for the Customer staff;
- d. Test support for User Acceptance Testing;
- e. Tracking, management, reporting on, collaboration on and resolution of defects; and
- f. Obtaining of Customer acceptance for the staging environment configuration to graduate to production.

#### **2.5.4 Pre-Requisites**

The following pre-requisites are required:

- a. Staging and production platform environments, necessary access to them; and
- b. Firewall and networking configuration allowing outbound and inbound communications between customer's platform environments and CloudBlue Connect.

#### **2.5.5 Exclusions**

The following are exclusions:

- a. Functional customizations of Customer's platform;
- b. Functional customizations of the CloudBlue Connect Provider and Vendor portals;
- c. Creation of any branding materials and customer-facing content and communication templates;
- d. Creation of custom operations or deployment documentation;
- e. Deployments, configuration and verifications of any software and modules other than specified;
- f. Configuration and troubleshooting of any operating systems, networking and hardware;
- g. Resolution of any issues with hardware and software encountered during the delivery of Services;
- h. Registration of domains, provision of SSL certificates;
- i. Creation of User Acceptance Testing plans; and
- j. Performing extended testing (e.g., end-to-end testing covering third party systems, full regression testing, performance and load testing, stress testing, penetration testing, etc.).

## 2.6 CLOUDBLUE CONNECT AND COMMERCE RESELLER SETUP

This offering is based on three phases to complete the delivery. This offering enables Customers to use CloudBlue Connect to offer CloudBlue Connect-based products under a Reseller in the Customer's platform environments.

### 2.6.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful Service delivery.

### 2.6.2 Configure Milestone

The purpose of this phase is to perform configuration activities for the delivery of the Service as follows:

- a. Creation of a separate CloudBlue Connect Marketplace within a customer's CloudBlue Connect Provider account;
- b. Creation of a CloudBlue Connect Vendor for the Customer (optional);
- c. Creation of a test/example Product within the Customer's CloudBlue Connect Vendor (optional);
- d. Creation of a connection for the test/example Product with the Customer's new CloudBlue Connect Marketplace;
- e. Publishing of the test/example Product in the Customer's platform Staging and Production environments, delegation of the test/example Product service plans to the designated reseller; and
- f. Hand over to Customer Operations team and CloudBlue Managed Services (optional).

### 2.6.3 Verify Milestone

The purpose of this phase is to verify the delivered components and configuration as follows:

- a. Validation unit testing of the deployed components and configuration;
- b. Placing and fulfilling test orders for the test/example Product;
- c. Guided walkthrough for primary business scenarios for the Customer staff;
- d. Test support for User Acceptance Testing;
- e. Tracking, management, reporting on, collaboration on and resolution of defects; and
- f. Obtaining of customer acceptance for the staging environment configuration to graduate to production.

### 2.6.4 Pre-Requisites

This offering has the following pre-requisites:

- a. Customer's platform environments are already integrated with CloudBlue Connect, i.e. CloudBlue Connect Provider Setup is already completed successfully;
- b. Customer's platform environments already have the target Reseller configured; and
- c. Necessary access to Customer's staging and production platform environments.

## 2.7 CLOUDBLUE CONNECT CONNECTOR DEPLOYMENT

This Service is based on three phases to complete the service delivery.

### 2.7.1 Install Phase

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery. The tasks include the following:

- a. Deploy the APS frontend available from CloudBlue Connect;
- b. Verify the pre-work document (licenses, resources, service templates, service plans).

### 2.7.2 Configure Phase

The purpose of this phase is to perform necessary Platform configuration for the Customer. The tasks include the following:

- a. Application instance configuration according to the pre-work document;
- b. Licenses, resources, service templates, service plans configuration according to the pre-work document;
- c. Marketplace configuration;
- d. Additional configuration, if required.

### 2.7.3 Verify Phase

The purpose of this phase is to assist the Customer with the User Acceptance Testing (UAT) and business cutover preparations and to obtain a sign-off on the UAT completion and the business cutover readiness. Also, the services organization will work with the Customer to support business cutover activities and will work together with the Customer and the Managed Services team for the handover of ongoing connector support. The tasks include the following:

- a. Perform unit testing of the deployed connector;
- b. Perform testing of customer ordering, upgrade/downgrade and cancellation scenarios;
- c. Perform a guided walkthrough for primary business scenarios for the Customer staff;
- d. Provide test support for User Acceptance Testing;
- e. Track, manage, report on, collaborate on and resolve defects;
- f. Obtain customer acceptance for the deployed connector configuration.

### 2.7.4 Assumptions

The following assumptions are applicable to this Appendix:

- a. The number of service plans to be configured will not exceed 50 (fifty).

## 2.8 SYNDICATION PRODUCT SETUP (CLOUDBLUE CONNECT BASED)

This offering is based on three phases to complete the delivery.

Application backend (endpoint) is configured on the CloudBlue side (CloudBlue Connect platform) and there is no application backend (endpoint) in Provider's environments.

### 2.8.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery and:

- a. Verify prework (licenses, resources, service templates, service plans)
- b. Install CloudBlue Connect Connector for the product
- c. Apply APS specific configuration settings

### 2.8.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the Customer as follows:

- a. Application instance configuration according to prework
- b. Licenses, resources, service templates, service plans configuration
- c. Online Store configuration
- d. Additional configurations for the product, if required

### 2.8.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover.

- a. Perform unit testing of the deployed Connector
- b. Perform testing of customer ordering, upgrade/downgrade and cancellation scenarios
- c. Perform a guided walkthrough for primary business scenarios for the Customer staff
- d. Provide test support for User Acceptance Testing
- e. Track, manage, report on, collaborate on and resolve defects
- f. Obtain customer acceptance for the deployed Connector configuration

### 2.8.4 Pre-Requisites

- a. Provider's CloudBlue Connect account is set up and Provider's Platform environments are integrated with the CloudBlue Connect platform. As part of that, APS Controller Proxy is deployed and configured in Provider's Platform environments.

## 2.9 SYNDICATION PRODUCT SETUP (CLOUDBLUE HOSTED BACKEND)

This offering is based on three phases to complete the delivery.

Application backend (endpoint) is configured on the CloudBlue side and there is no application backend (endpoint) in Provider's environments. This can also be referred to as a Syndication Type II Connector.

### 2.9.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery and:

- a. Verify prework (licenses, resources, service templates, service plans)
- b. Install Connector for the product
- c. Apply APS specific configuration settings

### 2.9.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the Customer as follows:

- a. Application instance configuration according to prework
- b. Licenses, resources, service templates, service plans configuration
- c. Online Store configuration
- d. Additional configurations for the product, if required

### 2.9.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover.

- a. Perform unit testing of the deployed Connector
- b. Perform testing of customer ordering, upgrade/downgrade and cancellation scenarios
- c. Perform a guided walkthrough for primary business scenarios for the Customer staff
- d. Provide test support for User Acceptance Testing
- e. Track, manage, report on, collaborate on and resolve defects
- f. Obtain customer acceptance for the deployed Connector configuration

### 2.9.4 Pre-Requisites

- a. APS Controller Proxy is deployed and configured in Provider's Platform environments

## 2.10 PLUG-IN DEPLOYMENT

This offering is based on three phases to complete the delivery of a plugin of one of the following types:

Code	Name	Description
TAXPLUGIN	Taxation Plugin	Payment Plugin to Platform
PAYPLUGIN	Payment Plugin	Payment Plugin to Platform

### 2.10.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of the plugin as follows:

- a. Endpoint validation;
- b. Pework validation; and
- c. Plugin deployment.

### 2.10.2 Configure Milestone

The purpose of this phase is to perform necessary plugin configuration for the Customer as follows:

- a. Plugin configuration;
- b. Specific plugin settings configuration, based on the plugin type; and
- c. Recourses, templates, service plans configuration (if required).

### 2.10.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover as follows:

- a. Verify the connectivity between plugin and target system (either domain registrar or payment center).



## 2.11 CONFIGURATION

This offering is based on three phases to complete the delivery.

### 2.11.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery, as follows:

- a. Hardware requirement check;
- b. Network requirements validation;
- c. Plesk licenses validation;
- d. Prework for non-default service templates and plans – if required;
- e. Service node registration in OA; and
- f. Additional hosts registration – if required.

### 2.11.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the Customer, as follows:

- a. Transition of platform modules (Shared Hosting, Plesk, OACI) from a platform to the Customer Platform;
- b. Install and configure a Payment Plugin on the Platform;
- c. Deploy Staging environment for the Platform; and
- d. As part of this project, the following steps may be taken:
  - I. Installation and configuration of a Plugin on the Platform (if required);
  - II. De-registering hosts from the Platform;
  - III. Deployment of module in the instance of the Platform;
  - IV. Deployment of hosts in instance of the Platform;
  - V. Configuration of Service Templates and Service Plans on the Platform;
  - VI. Deployment of Staging environment for the platform with following modules: OA, BA, Online Store, Office365, WebHosting Linux (Clustered), Shared Hosting Plesk, Domain Registration Plugin, SSL Certificate Plugin, Payment Plugin); and
  - VII. Configuration of one (1) Value Added Reseller.

### 2.11.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover. The services organization will work with the Customer to support business cutover activities to the Platform, and will work together with the Customer and the Managed Services team for a proper handover of ongoing Platform support, including:

- a. Perform unit testing of the installations, deregistered, deployed, configured components of the Platform;
- b. Perform a guided walkthrough for primary business scenarios for the Customer staff;
- c. Provide test support for User Acceptance Testing;
- d. Track, manage, report on, collaborate on and resolve defects;
- e. Obtain Customer acceptance for the configuration scope; and
- f. Verify that additional resources are configured according to the prework.

## 2.12 MIGRATION SOLUTIONS OVERVIEW

CloudBlue Migrations Solutions are based on the simplified model from the migration framework and service specific modules built which can be leveraged to import customer accounts and to migrate existing subscriptions.

CloudBlue has developed several processes for migrating information from one system to another. Our Migration Solutions uses tools and a framework for each type of migration. CloudBlue will focus on the specific logic of the migration, which includes processes developed, on database access, rest clients and the interaction with the public APIs. In addition, the framework comes with a log system and a stage control.

Our CloudBlue specialists will help you build your migration strategy, assess your portfolio, review your cost structure and identify the best-fit cloud platform for your needs.

Either moving from a legacy on-premise solution or another marketplace provider, with the right strategy, you can drive efficiency through operations automation, grow revenue through innovation, modernize your services and realize cost savings offered by CloudBlue

The following are some of the migration types that can be performed.

T2CMPCNT	Traditional to CloudBlue Connect	Import external data (customers and subscriptions) to CloudBlue Connect.
T2CMPADV	Traditional to APS 2.0	Import external data (customers and subscriptions) to APS 2.0
OLD2ADV	APS 1.2 to APS 2.0	Move old APS 1.2 subscriptions to APS 2.0
OLD2CNT	APS 1.2 to CloudBlue Connect	Move old APS 1.2 subscriptions to CloudBlue Connect
CNT2ADV	CloudBlue Connect to APS 2.0	Move CloudBlue Connect Subscription to APS 2.0
ADV2CNT	APS 2.0 to CloudBlue Connect	Move APS 2.0 Subscriptions to CloudBlue Connect.
PLT2PLT	Platform to Platform	Move any platform item from one to another. External to CloudBlue

CloudBlue Upgrade Services are based on the standard model for platform upgrades and service specific modules built which can be leveraged to import customer accounts and to migrate existing subscriptions.

CloudBlue has developed specific upgrade procedures to enable customers to migrate to the latest version with minimal impact to the customers business. Upgrade Services uses tools and a framework for each upgrade to prepare, test, upgrade and verify the installation.

Our CloudBlue specialists will help you build your upgrade plan, assess your existing environment for upgrade readiness and provide a report post upgrade. Keeping up to date with the latest version of the platform enables you to leverage the latest technology and schemas available for either business workflow, provider functionality and platform security.

The following are some of the upgrade types that can be performed.

<b>UPGRDENT</b>	Upgrade of platform versions	Provide upgrade services to customers that are subscribed to the basic support option
<b>UPGRDEOL</b>	Upgrade of out of support platforms	Provide upgrade services to customer with platforms versions that are out of support

## 2.13 MIGRATION SOLUTIONS

### 2.13.1 Prepare Milestone

The purpose of this phase is to launch the project, gather and define all information required for providing the tasks for the successful installation of the platform to;

- a. Develop or modify tools for reseller migration, as required.
- b. Develop or modify tools for customer data migration, as required.
- c. Develop tools or make changes to existing services integration, as required by subscription migration process.
- d. Deploy/configure/test tools or procedure as required for reseller data migration.
- e. Deploy/configure/test tools or procedure as required for customer data migration.
- f. Deploy/configure/test tools or procedure as required for subscription migration.
- g. Prepare/provide templates to gather information about resellers to be migrated.
- h. Prepare/provide templates to gather information about customers to be migrated.
- i. Prepare/provide templates to gather information about subscriptions to be migrated

### 2.13.2 Import Milestone

The purpose of this phase is to perform necessary Platform configuration for the customer.

- a. On-board resellers
  - I. Review and validate CSV file and make sure it has all necessary details for reseller creation.
  - II. Check for duplicates in the CSV file.
  - III. Check if reseller already exists in CloudBlue.
  - IV. Run few test migrations.
  - V. On-board resellers.
  - VI. Configure the resellers to ensure that they have relevant and required catalogue available, as required by migration.
  - VII. Validate if the procedure went smoothly, review logs.
  - VIII. Troubleshoot and fix, if any errors.
  - IX. Verify results.
- b. Import customer accounts.
  - I. Review CSV file and make sure it has all necessary details for account creation.
  - II. Check for duplicates in CSV file.
  - III. Check if customer already exists in CloudBlue.
  - IV. Run few test migrations.
  - V. On-board customers.
  - VI. Validate if the procedure went smoothly, review logs.
  - VII. Troubleshoot and fix, if any errors.

- c. Import existing subscriptions for the following 3 services:
  - I. Review and validate gathered customer data and make sure it has all necessary details for subscription migration.
  - II. Validate if pre-requisites required for subscription migration are in place.
  - III. Make configuration changes, as required.
  - IV. Run few test migrations.
  - V. Perform migration operation.
  - VI. Validate if the procedure went smoothly, review logs.
  - VII. Troubleshoot and fix, if any errors.

#### **2.13.3 Validate Milestone**

The purpose of this phase is to have the customer sign off that UAT is complete and ready for business cutover. Ingram will work with Customer to support business cutover activities to the Platform, and to work together with Customer and Managed Services team for proper handover of ongoing Platform support, including;

- a. Verify results of on-boarded resellers
- b. Verify results of customer accounts imported
- c. Verify results of subscriptions imported

#### **2.13.4 Assumptions**

- a. Past reconciliation of orders has been done for orders.
- b. No order history is imported.

#### **2.13.5 Exclusions**

- a. CSV preparation
- b. Migration of order/subscription history.

## 2.14 ADVANCED UPGRADE ASSISTANCE

Those customers that are on a version that has exceeded the End of Maintenance Milestone, CloudBlue recommends the following service as a paid engagement. If you continue to use the CloudBlue Platform that is on a version that has reached End of Life, your Platform may still work, but it may become more vulnerable to security risks. CloudBlue may no longer provide best practices for the support for your business. Upgrade project coordinator will provide consultative assistance and follow up during customer's User Acceptance Testing for the developed on the pre-upgrade stage set of scenarios.

CloudBlue provides upgrade assistance to all its customers and this service is included into specific services packages. Customers with Legacy TAM and/or Managed Services subscriptions will have upgrade coordination provided by CloudBlue.

Customers who are on Basic Support will have only basic upgrade assistance provided, excluding any upgrade project coordination and assistance on Prepare Milestone and Validate Milestone stages.

Basic upgrade assistance is provided as follows:

- a. Scheduling the upgrade to any available slot in the upgrade schedule;
- b. Upgrade pre-check that allows upgrade team to verify if platform is ready for upgrade;
- c. Upgrade execution (upload distribution and upgrade scripts, run upgrade script); and
- d. Basic check-up of main services up & running (any remaining issues are communicated to customer to report them to support team for investigation).

To be done by Customer:

- a. Upgrade project coordination and execution;
- b. Platform readiness for the upgrade against release notes, existing issues and pre-check results;
- c. Pre-upgrade or post-upgrade issues follow-up – all issues are to be handled by customer with or without CloudBlue support team assistance; and
- d. Post-upgrade testing.

### 2.14.1 Prepare Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery:

- a. Downtime assessment;
- b. Run pre-check and provide results;
- c. Database validation;
- d. Build upgrade and tech risks mitigation plan;
- e. Release notes walk through;
- f. Consultancy for pre-upgrade backup;
- g. Go through pre-check results with recommendations;
- h. Flexible upgrade schedule;
- i. Gap-analysis (platform);
- j. Gap-analysis (apps, infrastructure, CSD);
- k. Flexible upgrade timing (fixed maintenance timeslot);

## Service Description | Professional Services

- l. Consultancy for blockers elimination;
- m. Consultancy for task queue clean up; and
- n. Customer specific post-upgrade test scenarios development.

### **2.14.2 Import Milestone**

The purpose of this phase is to perform necessary Platform configuration for the Customer, including:

- a. In-progress communication (status updates);
- b. Upgrade coordinator available 24/7;
- c. Support SME on duty for Business-Critical issues; and
- d. Critical issues expedited (report to support).

### **2.14.3 Validate Milestone**

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover. The services organization will work with the Customer to support business cutover activities to the Platform, and will work together with the Customer and the Managed Services team for a proper handover of ongoing Platform support, including:

- a. Status report and issues tracker provided;
- b. Basic check-up of main services up and running;
- c. Customer specific post-upgrade tests scenarios (User Acceptance Testing follow up); and
- d. Issue tracker follow-up until full resolution.

## 2.15 BILLING VALIDATION

The following scope of Services will be provided to the Customer as listed in this Appendix A, testing of the platform behaviour on future date billing to understand how the platform will act on a specific date in future. This Service is based on three milestone phases to complete the delivery of the CloudBlue platform.

### 2.15.1 Install Phase

The purpose of this phase is to launch the project, gather and define all information required to deliver the following tasks;

- a. Design, test and document procedures required to test platform behavior on specific date in future and rollback platform to initial state after testing
- b. Review and validate test plan provided by the Customer
- c. Check that necessary objects required for testing (accounts, subscriptions) are created

### 2.15.2 Configure Phase

The purpose of this phase is to perform necessary Platform configuration and include the following;

- a. Create backup of environment
- b. Change date on environment to a specific date in future, run daily billing process to trigger creation of recurring orders, documents and notifications, create change orders and cancellation orders if required by test plan
- c. Restore environment to initial state after testing is completed

### 2.15.3 Verify Phase

The purpose of this phase is to have the customer sign off that UAT is complete and ready for business cutover and support the business cutover activities to the Platform, and to work together with Customer and or the Managed Services team for the handover of ongoing Platform support, including;

- a. Verify that daily billing process completes successfully during testing
- b. Verify that all necessary orders requested in test plan were created
- c. Prepare report with details of orders and documents generated and share report with the Customer for review
- d. Verify that environment functions correctly after restoring

### 2.15.4 Assumptions

The following assumptions are applied to this Appendix;

- a. Testing will be performed on non-Production environment
- b. Datacom will be provided with necessary level of access to the environment to perform backup, date change and restore
- c. Service described in this appendix covers testing of 1 product (service plan with specific billing type, billing period, subscription period, cancellation and refund settings) for up to 3 dates in future (for example: 1 month, 6 months and 12 months)
- d. Test plan with details of service plan and orders/documents and other objects to be checked after date shift will be provided by the Customer
- e. Testing will only include changing date to future. Tests with changing date to past will not be performed as such date changes can result in unexpected behavior of the platform

## Service Description | Professional Services

- f. Any platform objects (orders, documents, accounts, subscriptions, etc.) created during testing after environment backup will be gone once environment is restored to its initial state
- g. Sending email notifications may be rejected by email servers due to invalid date when environment date is shifted to future. Notifications screen in Billing will be used to check what notifications platform would send on specific date

### **2.15.5 Exclusions**

The following exclusions are applied to the Appendix;

- a. Platform configuration and products (service plans) configuration
- b. Testing of services provisioning after date change – it may not work (especially if provisioning is done in system controlled by third-party ISV) due to invalid date
- c. Troubleshooting and identifying root cause if behavior of the platform during testing (such as billing dates and/or total/sub-total values in orders and documents generated) is different from what is expected by the Customer
- d. Anything not explicitly mentioned in sections 1,2 and 3 of this Appendix



## 2.16 SELF-DEPLOYED CLOUDBLUE CONNECT CONNECTOR VALIDATION & CERTIFICATION

This Service is based on three phases to complete the validation and certification of a CloudBlue Connect package. The CloudBlue Connect platform provides a self-onboarding framework for service vendors and service providers to effectively manage service integrations with CloudBlue automation platform. The service described in this document is for validation and certification of self-deployed connector in CloudBlue environment.

### 2.16.1 Install Milestone

- a. Verification of self-deployed connector package at CloudBlue environment.
- b. Verification tests are conducted against the test script which verifies conformance to Connector standard

### 2.16.2 Configure Milestone

- a. Perform dry run of self-deployed connector
- b. In case of any failure, appropriate error logs and documentation of failure scenarios are provided to the customer

### 2.16.3 Verify Milestone

- a. If a CloudBlue Connect package verification fails, the recertification process is repeated after consultation with the customer

### 2.16.4 Assumptions

- a. Each Connector package in any given environment (Production, and Staging.) is treated as a single entity
- b. Services will be able to deliver the validation/certification work remotely
- c. Maximum of two SKUs are verified during the certification dry run
- d. The subject Connector has been successfully "Previewed" by the Vendor before and operational
- e. Any additional recertification requirement (e.g. failure on the first run or due to ISV changes)

### 2.16.5 Exclusions

- a. Installation of the platform, package itself
- b. Any code changes to the connector package
- c. Vendor portal changes / configuration

## 2.17 GO-TO-MARKET AUTOMATOR SETUP

Go-to-Market Automator is a digital solution that helps to simplify and digitize the go-to-market launches of products and services within an intuitive interface. As an add-on to CloudBlue Connect and CloudBlue Commerce, Go-to-Market Automator centralizes and standardizes how marketing content is provided and consumed by internal teams and indirect partners to help streamline sales enablement and marketing activities.

The following scope of Services will be provided to Customer, covering the activity of GTM Automator Setup with Customer's branding and content.

### 2.17.1 Install Phase

The purpose of this phase is to launch the GTM Automator Setup project, gather and define all information required and perform the following tasks:

- a. Master account creation and configuration of terms and conditions, alert notifications and system e-mails
- b. SSO integration

### 2.17.2 Configure Phase

The purpose of this phase is to perform necessary configuration, which includes the following tasks:

- a. Configure branding, including domain/subdomain setup, company logo and brand style guidelines (optional)
- b. Curation of fifty (50) products content (playbooks and campaigns)
- c. Upload of Customer content in the Insights and Tools section
- d. Admin setup including Content Management System (CMS) and global reporting

### 2.17.3 Verify Phase

The purpose of this phase is to perform validation, assist the Customer with User Acceptance Testing (UAT) completion and support business cutover activities for the Platform. That includes the following tasks:

- a. Full end-to-end QA
- b. User Acceptance Testing support
- c. Four (4) virtual training sessions to educate and onboard operations teams

### 2.17.4 Assumptions

The following assumptions are applied to this Appendix:

- a. Required efforts are not to exceed one hundred and fifty (150) man-hours of development resources

### 2.17.5 Exclusions

The following exclusions are applied to the Appendix:

- a. Any custom software development and/or scripting unless explicitly detailed in the scope of Services above
- b. Anything not specifically covered in the scope of Services above

## 2.18 GO-TO-MARKET BUILDER SETUP

Go-to-Market Builder is a SaaS content creation and management tool that enables Customer's internal teams and external partners/vendors to create, provide and manage standardized go-to-market content that will get published into Go-to-Market Automator and help streamline sales enablement and marketing activities.

The following scope of Services will be provided to Customer as listed in this Appendix, covering the activity of Go-to-Market Builder Setup.

The Services are based on three (3) milestone phases to complete the delivery.

### 2.18.1 Install Phase

The purpose of this phase is to launch the Go-to-Market Builder Setup project, gather and define all information required and perform the following tasks:

- a. Master Go-to-Market Builder account creation
- b. Setup of a Content Management System instance to allow for Customer's internal teams or external partners/vendors to create and manage their product content (playbooks and campaigns)

### 2.18.2 Configure Phase

The purpose of this phase is to perform necessary configuration, which includes the following tasks:

- a. Configuration of branding for Go-to-Market Builder, including Customer domain/subdomain setup, company logo and design

### 2.18.3 Verify Phase

The purpose of this phase is to perform validation, assist Customer with User Acceptance Testing (UAT) completion and support business cutover activities. That includes the following tasks:

- a. Full end-to-end QA, including a review session with Customer
- b. User Acceptance Testing support and obtaining of Customer's acceptance
- c. Up to four (4) virtual training and onboarding sessions to educate and onboard operations teams

### 2.18.4 Assumptions

The following assumptions are applied to this Appendix:

- a. Required efforts are not to exceed two hundred and fifty (250) man-hours

### 2.18.5 Exclusions

The following exclusions are applied to the Appendix:

- a. Any custom software development and/or scripting
- b. Anything not specifically covered in the scope of Services above

## 2.19 GO-TO-MARKET AUTOMATOR SSO SETUP

Go-to-Market Automator SSO Setup Service allows Customer to integrate the Go-to-Market Automator UI into existing systems including SSO and centralized identity management (e.g. Microsoft Office 365, Google).

The following scope of Services will be provided to Customer as listed in this Appendix, covering the activity of GTM Automator SSO Setup.

The Services are based on three (3) milestone phases to complete the delivery.

### 2.19.1 Install Phase

The purpose of this phase is to launch the GTM Automator SSO Setup project, gather and define all information required and perform the following tasks:

- a. Obtain SSO credentials and protocol from Customer

### 2.19.2 Configure Phase

The purpose of this phase is to perform necessary configuration, which includes the following tasks:

- a. Configure and test SSO with several test user accounts

### 2.19.3 Verify Phase

The purpose of this phase is to perform validation, assist Customer with User Acceptance Testing (UAT) completion and support business cutover activities. That includes the following tasks:

- a. Hold a review session with Customer and demonstrate SSO working from Customer portal(s) to GTM Automator
- b. User Acceptance Testing support and obtaining of Customer's acceptance

### 2.19.4 Assumptions

The following assumptions are applied to this Appendix:

- a. Required efforts are not to exceed one hundred and fifty (150) man-hours

### 2.19.5 Exclusions

The following exclusions are applied to the Appendix:

- a. Any custom software development and/or scripting
- b. Anything not specifically covered in the scope of Services above

## 2.20 VALUE ADDED RESELLER SETUP

This Service is based on three phases to complete the delivery of a Value-Added Reseller.

### 2.20.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery.

- a. Validation of service plans, templates and reseller specific parameters;

### 2.20.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the Customer as follows:

- a. Reseller setup and configuration;
- b. Upload Reseller-specific branding and localization;
- c. Create a Sales Channel/Reseller/Operating Company configuration; and
- d. Billing configuration: Sales Category, Recourse Category, Online Store.

### 2.20.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover as follows:

- a. Verify panel functionality;
- b. Verify configuration: branding, customization, localization, Online Store;
- c. Verify services provisioning; and
- d. Verify end-user's part.

## 2.21 SERVICE PLAN SETUP

This Service is based on three phases to complete the delivery of the CloudBlue platform.

### 2.21.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery.

- a. Validation of service plans;

### 2.21.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the Customer as follows:

- a. Configure service plan according to the prework.

### 2.21.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover as follows:

- a. Verify plan settings (fees, subscription periods etc.); and
- b. Test provisioning.

## 2.22 STANDALONE APS CONNECTOR DEPLOYMENT

This Service is based on three phases to complete the delivery of a standalone APS package.

### 2.22.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of a standalone APS package as follows:

- a. Verify hardware requirements;
- b. Verify prework (licenses, resources, service templates, service plans);
- c. Endpoint preparation; and
- d. APS deployment.

### 2.22.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the Customer as follows:

- a. Application instance configuration according to prework;
- b. Licenses, resources, service templates, service plans configuration;
- c. Online Store configuration; and
- d. Additional configurations, if required (optional).

### 2.22.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover by doing the following:

- a. Perform unit testing of the deployed APS package;
- b. Perform testing of customer ordering, upgrade/downgrade and cancellation scenarios;
- c. Perform a guided walkthrough for primary business scenarios for the Customer staff;
- d. Provide test support for User Acceptance Testing;
- e. Track, manage, report on, collaborate on and resolve defects; and
- f. Obtain customer acceptance for the deployed APS package configuration.

## 2.23 APS CONTROLLER PROXY DEPLOYMENT

This Service is based on three phases to complete the delivery of the ASP Controller proxy.

### 2.23.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of the APS Controller proxy by doing the following:

- a. Hardware requirements verification;
- b. Network requirements verification;
- c. Required packages installation; and
- d. Install SSL certificate.

### 2.23.2 Configure Milestone

The purpose of this phase is to perform necessary configuration of the APS Controller host for the Customer by doing the following:

- a. Create configuration files;
- b. Adjusting firewall configuration; and
- c. Add configured proxies to OA settings.

### 2.23.3 Verify Milestone

The purpose of this phase is to verify that the APS Controller host is functioning by doing the following:

- a. Verifying the connection to APS Controller through proxy with curl;
- b. Add APS Controller IP to Allowed Network section if necessary;
- c. Verify external connection to APS Controller; and
- d. Verify SSL functionality.



## 2.24 WEBHOSTING PLESK DEPLOYMENT

This Service is based on three phases to complete the delivery of the Webhosting Plesk module.

### 2.24.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of the Webhosting Plesk module, including:

- a. Hardware requirement check;
- b. Network requirements validation;
- c. Plesk licenses validation;
- d. Prework for non-default service templates and plans – if required;
- e. Service node registration in OA (Admin Plesk panel will be installed on this step); and
- f. Additional hosts registration – if required.

### 2.24.2 Configure Milestone

The purpose of this phase is to perform necessary Webhosting Plesk module configuration for the Customer, as follows:

- a. Default resources are configured automatically; and
- b. Additional resources (service plans, templates) configuration.

### 2.24.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover, including:

- a. Perform unit testing of the deployed module;
- b. Perform testing of customer ordering, upgrade/downgrade and cancellation scenarios;
- c. Perform a guided walkthrough for primary business scenarios for the Customer staff;
- d. Provide test support for User Acceptance Testing;
- e. Track, manage, report on, collaborate on and resolve defects;
- f. Obtain customer acceptance for the deployed connector configuration; and
- g. Verify that additional resources are configured according to the prework.

## 2.25 HOSTED SERVICES ADDITIONAL SERVER DEPLOYMENT

This Service is based on three phases to complete the delivery of an additional server to any hosting module (ex. WHP, OACI, Exchange).

### 2.25.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful installation of an additional server to a hosting module, including:

- a. Hardware requirement check;
- b. Network requirements validation;
- c. Licenses validation (if required); and
- d. Service node registration in OA.

### 2.25.2 Configure Milestone

The purpose of this phase is to perform necessary server configuration for the Customer, including:

- a. Service node configuration; and
- b. Module configuration.

### 2.25.3 Verify Milestone

The purpose of this phase is to have the Customer sign off that User Acceptance Testing is complete and ready for business cutover, including:

- a. Perform unit testing of the deployed server; and
- b. Perform testing of provisioning to the newly deployed server.

## 2.26 INTEGRATION SOLUTIONS OVERVIEW

The goal of Integration Solutions is to seamlessly mesh the CloudBlue platform into your organization. CloudBlue Integration Solutions provide an enterprise grade implementation of the subjects covered in the Integration guide, applying our experience and knowledge of integrating into your existing value chains.

CloudBlue can be integrated with any existing back office environments; and supports both multi-tenant and dedicated models to meet all requirements. While integrations are initially focused on the implementation of a new CloudBlue platform they are equally appropriate throughout the lifecycle as your business grows and changes.

Integration is a complete managed process that cover the full range of tasks to identify, agree and deliver a seamless integration, as well as the on-going support to ensure the long-term delivery of value.

## 2.27 INTEGRATION DEVELOPMENT

This Service is based on three phases to complete the delivery of the CloudBlue platform. These services range in size and complexity. A Technical Scoping document will be jointly agreed with the customer for sign-off.

Integration Solutions is a value-added support services that can be configured to meet your discrete needs, combining personalized services of our specialist integration architects, with our experience of delivering the CloudBlue platform into a wide range of businesses.

### 2.27.1 Design Phase

The purpose of this phase is to define and plan the integration, setting the foundation for the successful integration of the platform into your organization. This phase will;

- a. Generate the Technical Scoping document
- b. Generate a High-Level Architecture positioning the CloudBlue platform within your organization
- c. Determine and agree a plan to deliver the integration as agreed

Depending on the level of integration needed, this process can include:

- a. Agreeing and identifying the position of the CloudBlue platform within the wider context of your organization. Working through the options relevant for your organization's landscape and goals.
- b. Mapping the standard Customer Journeys supported by the CloudBlue platform to your specific requirements, operation and business outcomes. Identifying how the CloudBlue platform will cooperate with the other aspects of your organization in term of systems, people and process.
- c. Determining the interactions between CloudBlue and other systems to ensure accurate and timely availability of information and delivery of a seamless and cohesive experience and service. Applying the well-known and proven patterns for each type of integration.
- d. Mapping the interaction between your organization and those of your partners and/or resellers, determining how and where CloudBlue will enable and enhance this relationship and the levels and types of integration that will be offered to partners.
- e. Determining an appropriate hosting and deployment model of to ensure that your security performance and compliance requirements are met.
- f. Developing an implementation plan to achieve the above; either as a single delivery or a staged roadmap as appropriate.

### 2.27.2 Build Phase

The purpose of this phase is to deliver the integration agreed in the Design Phase. This phase will require a degree of collaboration with parts of your organization to correctly configure, implement and test the integration. The phase will consist of:

- a. Establishing a lab/test environment and connections to your lab/test systems

- b. Performing detailed design, mapping the flow of information between your systems and CloudBlue
- c. Implementing connectors to your organizations systems through the CloudBlue integration framework.
- d. Unit, system and integration level testing of the connectors.
- e. Establishing the production environment and connections to your systems

### **2.27.3 Accept Phase**

The purpose of this phase is to sign off that UAT is complete and ready for business cutover. Ingram will work with you to support business cutover activities to the integrated platform, and to the Managed Services team for proper handover of ongoing integration support, including;

- a. Provide test support for User Acceptance Testing of the integration scenarios
- b. Track, manage, report on, collaborate on and resolve defects
- c. Obtain customer acceptance for the lab/test environment to graduate to production
- d. Provide support for production verification testing and resolve issues

## **2.28 INTEGRATION MAINTENANCE**

This offering is based on a previous integration deployment. It is billed on an annual basis in advance and provides on going certainty for the operation of the deployed integration environment and includes:

- a. Ongoing IP management and retention. Securing and managing the source code and relevant documentation, along with ensuring there are available staff with the skills and specific knowledge to maintain the implemented integration
- b. 3<sup>rd</sup> line support for analysis of production issues and break fix resolution as appropriate
- c. Support and testing for upgrades of the deployment environment (e.g. operating systems, dependent tools, non-breaking changes for integrated systems upgrades, patching)

This service can be enhanced to include support for on-going change and enhancements to the integration on a prioritized basis

## 2.29 PLATFORM FUNCTIONALITY ACCELERATED DEVELOPMENT

This service is based on three phases to complete the delivery of Generally Available (GA) Platform functionality as per the requirements specified in a PFR request.

### 2.29.1 Design Phase

The purpose of this phase is to launch a project and gather and define all information required for the successful development of the required functionality. The tasks and outcomes are:

- a. Define project delivery timelines based on the product lifecycle, resources availability and priorities;
- b. Create a Functional Requirements Document (FRD) including the list of use cases;
- c. Define the software architecture for the functionality based on the FRD and Solution Design Document (SDD).

### 2.29.2 Build Phase

The purpose of this phase is to build the functionality designed and agreed on in the Design Phase. The tasks and outcomes are:

- a. Develop the functionality as per the FRD scope;
- b. Perform internal QA as per the FRD scope;
- c. Create or update documentation;
- d. Release the functionality in the agreed product version as per the project timelines.

### 2.29.3 Accept Phase

The purpose of this phase is to provide support for customer User Acceptance Testing, sign off and business cutover activities. The tasks and outcomes are:

- a. When the Customer's Platform is upgraded to the agreed product version that includes the functionality, perform a demonstration for the Customer staff and / or CloudBlue Managed Services if the Customer uses Managed Services from CloudBlue;
- b. Provide support for User Acceptance Testing performed on a Staging Environment, track and resolve defects found during User Acceptance Testing;
- c. Provide support for Production Verification Testing performed on the Production Environment and assist with resolving issues.

## 2.30 LOCALIZATION DEVELOPMENT

This Service is based on three phases to complete the delivery of an additional language pack.

### 2.30.1 Install Milestone

The purpose of this phase is to launch the project, gather and define all information required for the successful service delivery as follows:

- a. Locale installation; and
- b. For custom locale installation – OA, BA and APS part separately.

### 2.30.2 Configure Milestone

The purpose of this phase is to perform necessary Platform configuration for the Customer, including:

- a. Enabling locale choice on login screen (per brand).

### 2.30.3 Verify Milestone

The purpose of this phase is to have the customer sign off that User Acceptance Testing is complete and ready for business cutover, as follows:

- a. Verify that the correct language is displayed in all OA and BA screens and Online Store and
- b. Verify that locale was propagated to required resellers (per brand).

## 2.31 LOCALIZATION MAINTENANCE

In addition to providing a one-time service, an additional “Localization Maintenance” service is required for the Localization Development Service. It is billed on an annual basis in advance as part of the support for the localization framework that is used and includes 3<sup>rd</sup> level support, updates, patches, reinstall, locale management and IP retention and management.

### 3. EDUCATION SOLUTIONS

CloudBlue Education Solutions is designed to enable customers to maximize their potential of their CloudBlue solutions, and support them in reaching business goals, through instruction and distribution of quality learning programs.

A blended learning approach combines digital learning, with traditional instructor-led training (ILT) methods. This allows maximum choice and flexibility to ensure both experienced and new platform users members get the knowledge they need to be competent in CloudBlue Commerce, and CloudBlue Connect.

#### 3.1 DIGITAL TRAINING

Access to web-based, on-demand eLearning training modules or other online resources, covering the fundamentals required to work within the CloudBlue Commerce and CloudBlue Connect platforms. Modular topics cover a range of features and function, including navigation and real-world scenarios.

eLearning is designed to supplement instructor-led training. It can be used to quickly onboard platform users, embed into new-hire programs, provide just-in-time reference, and/or provide a foundation level training to those unable to travel or afford time away from the office.

eLearning is accessible from the [Ingram Micro Training platform](#). These training courses consist of:

- a. On-demand courses for CloudBlue Commerce and CloudBlue Connect accessed asynchronously by individual learners, through the learning management platform.
- b. Targeted role-based Commerce training, covering the basic operations per user. Learn through theory, guided simulations, and knowledge checks.
- c. CloudBlue Connect focused training, covering the fundamentals of using CloudBlue Connect for a simple and cost-effective way to offer new services.
- d. Access is provided on a per-user basis. Individuals are granted access to the specific course(s) matched to their role and responsibility in the platform.

#### 3.2 VIRTUAL INSTRUCTOR-LED TRAINING

Access to live training courses, delivered remotely by a Certified CloudBlue trainer, covering the breadth and depth of the platform. Courses are presented in a modular format, covering a wide range of technology, features, and management of the platform.

These solutions are offered in the following formats:

- a. Dedicated: devoted to the needs of an individual customer. Content can be adjusted and focused to the needs of that specific customer, using customer environment to deliver the training, where possible. Dates and times are agreed with the customer.
- b. Open Enrolment: open to any new or existing customer to attend. Content is generic, using a pre-configured training environment. Dates and times are decided by CloudBlue – a calendar of such classes will be made available.

These courses consist of:

- a. Live instructor-led training, delivered using the Zoom webinar conferencing tool
- b. Targeted role-based Commerce training, covering the basic and/or advanced operations per user, plus additional course options for the management and configuration of solutions via the platform.
- c. CloudBlue Connect focused training, covering either the fundamentals of using CloudBlue Connect for a simple and cost-effective way to offer new services and/or the advanced processes, workflows, standards and best practices of how to create products specific to your company and business operations.

- d. Participants learn through theory, extensive demonstrations by the trainer, interaction, discussions, and knowledge checks
- e. Audience size is restricted to twelve persons per class. This allows the trainer to replicate a classroom environment, with appropriate teacher/student interactions and activities

### 3.3 ONSITE INSTRUCTOR-LED TRAINING

Access to live training modules, delivered face-to-face by a Certified CloudBlue trainer, covering the breadth and depth of the platform. Courses are presented in a modular format, covering a wide range of technology, features, and management of the platform.

These solutions are offered in the following formats:

- a. **Dedicated:** dedicated to the needs of an individual customer. Content can be adjusted and focused to the needs of that individual customer, using customer environment to deliver the training, where possible. Dates and times are agreed with the customer. Training venue is provided by the customer. CloudBlue is responsible for making travel arrangements, customer is responsible for the associated costs (agreed in advance, billed after the event).
- b. **Open Enrolment:** open to any new or existing customer to attend. Content is generic, using a pre-configured training environment. Dates and times are decided by CloudBlue – a calendar of such classes will be made available. Training venue is provided by CloudBlue. Customer is responsible for making travel arrangements, customer is responsible for the associated costs.

These courses consist of:

- a. Live instructor-led training, delivered at the customer's location or CloudBlue office
- b. 50/50 hands-on/lecture experience. Participants learn primarily by doing, performing structured Lab activities in a pre-configured training environment/customer staging environment, with face-to-face expert guidance and support, interaction and discussions in a group setting
- c. Targeted role-based Commerce training, covering the basic and/or advanced operations per user, plus additional course options for the management and configuration of services via the platform.
- d. CloudBlue Connect focused training, covering the advanced processes, workflows, standards and best practices of how to create products specific to your company and business operations.
- e. Audience size is restricted to twelve persons per class. This allows the trainer to effectively manage a traditional classroom environment, with multiple teacher/student interactions and activities

### 3.4 SOLUTION(S) OVERVIEW

Education Solutions are offered in the following categories:

#### 3.4.1 Education Subscription Bundles

- a. access to learning resources in a single, annual subscription; choose from the breadth of the CloudBlue Commerce and CloudBlue Connect training services over a 12-month period, giving flexibility to deliver in training as and when your team need it most.
- b. Includes:
  - i. Digital training/eLearning
  - ii. Live instructor-led training
  - iii. Certification exams
  - iv. Exclusive invites to webinars for releases of CloudBlue Commerce and CloudBlue Connect; be amongst the first to see changes and access the latest exams.



### 3.4.2 Standalone Education Solutions

- a. access to any of the CloudBlue Commerce and CloudBlue Connect training services as and when required.

Education Subscription Bundles			
Services included	Essentials	Classic	Advanced
Digital eLearning seats	Up-to 12 active seats at any time	Up-to 12 active seats at any time	Up-to 12 active seats at any time
Certification exams	Yes For attendees of training classes	Yes For attendees of training classes	Yes For attendees of training classes
Instructor-led training Virtual or Onsite	Up-to 6 days 12 students per class	Up-to 8 days 12 students per class	Up-to 12 days 12 students per class
Release Training	12 attendees per webinar for each major CloudBlue Commerce and CloudBlue Connect release	12 attendees per webinar for each major CloudBlue Commerce and CloudBlue Connect release	12 attendees per webinar for each major CloudBlue Commerce and CloudBlue Connect release
Lab environment outside training	No	No	Yes

## 3.5 SERVICE ACTIVATION

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

- a. Provide login credentials for Digital Training within thirty (30) Days of the SoW Effective Date
- b. Schedule a pre-training call within the Customer within thirty (30) Days of the SoW Effective Date to review chosen options
- c. Provide a customized training plan and schedule of Delivery within thirty (30) Days of the SoW Effective Date

## 3.6 SERVICE LIMITATIONS

Prior to the start of scheduled training:

- a. Customer will indicate to CloudBlue in writing, a person to be the point of contact. All project communications will be addressed to such point of contact. Customer contact has the authority to act for Customer in all aspects of the project and resolve conflicting Customer requirements, including:
  - i. Coordinate with appropriate resources and book facilities for the Delivery of Services
  - ii. Obtain and provide project requirements, information, data, decisions and approvals within three (3) working days of the request, unless both parties agree to a different response time
  - iii. Provide accurate participant count, names and emails within two (2) weeks of scheduled Services
  - iv. Ensure CloudBlue Trainers have reasonable and safe access to training facility, parking, telephone and internet connectivity and workspace, as required for Onsite Services
- b. The parties intend for Delivery of Services to be provided within one (1) year of SoW Effective Date. In the event Customer does not schedule and allow CloudBlue to provide the Services within such one (1) year commencing on SoW Effective Date, Customer will remain liable for payment of the full amount of the Fees set out in this SoW. The Customer will also forfeit any Fees paid in advance and the Service will be

## Service Description | Professional Services

considered fully delivered and accepted. Any unused entitlement for training days at the end of the one (1) year will be forfeited (will expire).

- c. Specific dates for Delivery of Services will be agreed by Customer and Ingram Micro. The following Services require at least forty-five (45) business days advance notification for delivery:
  - i. Virtual Instructor-Led Training: Dedicated
  - ii. Onsite Instructor-Led Training: Dedicated
- d. Ingram Micro will provide a description of requirements for the Service Onsite Instructor-Led Training: Dedicated, including specifications for computer systems and/or internet connectivity. If required specifications cannot be provided by the Customer, the Service will be delivered in lecture only format, with no or limited practical activities.
- e. Agreed dates (e.g., scheduled training) will not be changed within less than two (2) calendar weeks' notice.
- f. To request a change, Customer must submit a Change Request. Ingram Micro will then assess the impact in terms of cost, timeline and scope and will revert back with an offer.

Should Ingram Micro cancel any scheduled Services, Ingram Micro will use reasonable efforts to give Customer advance notice of cancellation and will endeavour to reschedule as agreed between Ingram Micro and Customer. If the Services are cancelled for reasons within Ingram Micro's control, and cannot reasonably be rescheduled, Ingram Micro will refund Customer's associated pre-paid training fees. The refund will be Customer's only recourse in the event of Ingram Micro's cancellation.

- a. All training materials provided by Ingram Micro in any form, whether printed or electronic, are the copyrighted works of Ingram Micro. Training materials are for the sole use of the participant enrolled in the training course, and may not be used by any other person, reproduced, distributed or modified without Ingram Micro's express written permission.
- b. If Ingram Micro cannot reach an agreement with Customer for the requirements listed above, Ingram Micro reserves the right to terminate the Services as described on the SoW

### 3.6.1 Specific to Digital Training Services

Customer agrees to be responsible for ensuring there is no sharing of access or credentials to the Ingram Micro training site across multiple users. Ingram Micro reserves the right to revoke access for any user(s) at any time.

- a. Ingram Micro will not be held responsible for Customer completing this Service or for service delays/downtimes, if such failure, delay or downtime is on account of any reasons not attributable to Ingram Micro, including but not limited to, Customer's delay or failure to comply with their obligations or due to factors under Customer's control.

### 3.6.2 Specific to Virtual Instructor-Led Training Services

Ingram Micro may refuse to provide Service if, in its reasonable opinion, providing the Service creates an unreasonable risk to Ingram Micro or Ingram Micro's Service providers or if any requested service is beyond the scope of Service. Ingram Micro is not liable for any failure or delay in performance due to any cause beyond its control, including Customer's failure to comply with its obligations under this Service Description.

### 3.6.3 Specific to Virtual Instructor-Led Open Enrolment Training Services

- a. A public calendar of these classes will be accessible from the Ingram Micro Training site.
- b. Individual users at the customer will register for relevant class(es) via the Ingram Micro Training site.
- c. To register for these classes, Customer will be issued with a 'voucher code'. Code to be entered during the checkout process on the Ingram Micro Training site. One code per student/class will be issued. Ingram Micro will provide Customer will full instructions on the associated process, and demonstration, if necessary.

### 3.6.4 Specific to Onsite Instructor-Led Training Services

- a. Ingram Micro may refuse to provide Service if, in its reasonable opinion, providing the Service creates an unreasonable risk to Ingram Micro or Ingram Micro's Service providers, or if any requested service is beyond the scope of Service. Ingram Micro is not liable for any failure or delay in performance due to any cause beyond its control, including Customer's failure to comply with its obligations under this Service Description.
- b. Customer is responsible for ensuring availability of the following Onsite training requirements:
  - i. Data projector/screen for presentations
  - ii. Separate whiteboard with markers
  - iii. Students have individual desktops/laptops to run labs
  - iv. Sufficient number of power outlets for all students
  - v. Internet connectivity to remotely access to CloudBlue Education Solutions' training systems, preferably hard wire or very stable wireless. Lab exercises are dependent on a stable connection.
  - vi. A room of appropriate size to allow easy movement between all students
- c. 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 8 a.m. and 6 p.m. local time.
- d. Complete the questionnaire provided by Ingram Micro to Customer prior to delivery of the course

### **3.6.5 Post-Delivery of Any Instructor-Led Training Services**

- a. All students will be asked to complete a digital survey at the end of each event. Submissions are treated anonymously, and information is only ever used to improve the Education Solutions Ingram Micro provides to Customers.

## **3.7 SERVICE EXCLUSIONS**

- a. Training for 3rd party systems or software
- b. Development of custom courseware, unless agreed in advance with Customer
- c. Implementation, configuration or operations of 3rd party systems or software except listed in the SoW
- d. The development of any intellectual property created solely and specifically for the Customer
- e. Ingram Micro will, at its sole discretion, determine the number of instructors and the appropriate skill sets necessary to conduct the training. Customer agrees that any Ingram Micro resource may be an employee or consultant of Ingram Micro and/or an Ingram Micro service provider.
- f. This Service Description does not confer on Customer any warranties which are in addition to the warranties provided under the terms of your Agreement.

### 3.8 SKU LIST

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

<b>Education Subscription Bundles</b>	<b>SKU #</b>	<b>Metrics</b>	<b>Notes</b>
Essential Training Bundle	CB-EDU.SUB-ESS	One-Time	Recurring
Classic Training Bundle	CB-EDU.SUB-CLA	One-Time	Recurring
Advanced Training Bundle	CB-EDU.SUB-PRE	One-Time	Recurring
<b>Standalone Commerce Services</b>	<b>SKU #</b>	<b>Metrics</b>	<b>Notes</b>
Sales role-based Instructor-Led: Dedicated	CB-EDU.SAL	One-Time	Per Class
Sales role-based Instructor-Led: Open Enrolment	CB-EDU.SAL-OE	One-Time	Per User
Sales role-based Digital Training	CB-EDU.SAL-EL	One-Time	Per User
Finance role-based Instructor-Led: Dedicated	CB-EDU.FIN	One-Time	Per Class
Finance role-based Instructor-Led: Open Enrolment	CB-EDU.FIN-OE	One-Time	Per User
Finance role-based Digital Training	CB-EDU.FIN-EL	One-Time	Per User
Customer Service role-based Instructor-Led: Dedicated	CB-EDU.CS	One-Time	Per Class
Customer Service role-based Instructor-Led: Open Enrolment	CB-EDU.CS-OE	One-Time	Per User
Customer Service role-based Digital Training	CB-EDU.CS-EL	One-Time	Per User
Product-Marketing role-based Instructor-Led: Dedicated	CB-EDU.PDM	One-Time	Per Class
Product-Marketing role-based Instructor-Led: Open Enrolment	CB-EDU.PDM-OE	One-Time	Per User
Product-Marketing role-based Digital Training	CB-EDU.PDM-EL	One-Time	Per User
Admin Level1 role-based Instructor-Led: Dedicated	CB-EDU.AD	One-Time	Per Class
Admin Level1 role-based Instructor-Led: Open Enrolment	CB-EDU.AD-OE	One-Time	Per User
Admin Level1 role-based Digital Training	CB-EDU.AD-EL	One-Time	Per User
Admin Level2 role-based Instructor-Led: Dedicated	CB-EDU.AVA	One-Time	Per Class
Admin Level2 role-based Instructor-Led: Open Enrolment	CB-EDU.AVA-OE	One-Time	Per User
O365 CSP Instructor-Led Training: Dedicated	CB-EDU.OCSP	One-Time	Per Class
O365 CSP Instructor-Led Training: Open Enrolment	CB-EDU.OCSP-OE	One-Time	Per User
Azure CSP Instructor-Led Training: Dedicated	CB-EDU.ACSP	One-Time	Per Class
Azure CSP Instructor-Led Training: Open Enrolment	CB-EDU.ACSP-OE	One-Time	Per User
Orchestrator Instructor-Led Training: Dedicated	CB-EDU.ORB	One-Time	Per Class
Orchestrator Instructor-Led Training: Open Enrolment	CB-EDU.ORB-OE	One-Time	Per User
Training Environment for Labs-Testing	CB-EDU.TENV	One-Time	Per Day, Per Sandbox
<b>CloudBlue Connect Standalone Education Services</b>	<b>SKU #</b>	<b>Metrics</b>	<b>Notes</b>
CloudBlue Connect Essentials Digital Training	CB-EDU.CONN-EL	One-Time	Per User
CloudBlue Connect Champion Instructor-Led: Dedicated	CB-EDU.CONN	One-Time	Per Class
CloudBlue Connect Champion Instructor-Led Training: Open Enrolment	CB-EDU.CONN-OE	One-Time	Per User

## 4. 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.
On-Premise Platform	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
Staging Environment	A non-production, non-revenue-generating environment used by developers to model impacts to the Customer environment or test upgrades.
Operating Company	A separate company, entity or a business unit using the same Production Environment to manage commercial relationships with a separate customer base, segment or channel.
Connector	<p>A Connector is:</p> <ul style="list-style-type: none"> <li>* any standard or custom application packaged using Application Packaging Standard (APS),</li> <li>* any payment, domain or other plug-in,</li> <li>* any custom integration middleware,</li> <li>* any custom core platform module,</li> <li>* any standard platform module</li> </ul> <p>which integrates the platform with third-party systems and services external to the platform. E.g. Office 365, Azure, Dropbox, VMware deployments, Microsoft Exchange deployments, payment processors, in-house systems, etc.</p>
CloudBlue Connect	A cloud-based self-onboarding framework for service vendors and service providers that provides a simple, cost effective and accelerated way to offer new and manage lifecycle of existing service integrations and to replace the complexity of classic APS Package Design, Development, Testing, Certification and Publishing.