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Subscription Operations



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Auto-generated at April 30, 2026



Overview

Once customers purchase certain product items from specified marketplaces, Distributors systems can automatically generate *subscriptions* with required order data and *subscription requests* (also called *fulfillment requests*) on the CloudBlue Connect platform. Vendors are required to process these requests, activate subscriptions, and consequently fulfill customer orders.

In some cases, subscription activation should return specific parameters for product activation, such as license keys, serial numbers, activation links, etc. Note, however, that in case a Distributor doesn't have a commerce system for such operations, this Distributor can create subscriptions and provision required fulfillment parameters manually. Therefore, the system also requires such Distributors to register a customer account on Connect.

The aforementioned operations represent the Order Flow and performed via the *Subscriptions* module on the Connect platform. The following instructions demonstrate how *Mighty Mick's LLC* can manually register a customer account, create a subscription, and provide a license key to customers once this subscription is activated.

Prerequisites

Make sure that the following prerequisites are met:

- Required hub and marketplace are created.
- Distributors invited Vendors to the platform.
- Distributors successfully listed a product within a required marketplace.

Customer Accounts

In general, the system generates customer and resellers accounts automatically. However, you can also manually register such accounts via the **Customers** module as described below.



Note

The system requires Distributors to create a reseller account first. Thereafter, the system allows registering customer accounts and assign them your created reseller.

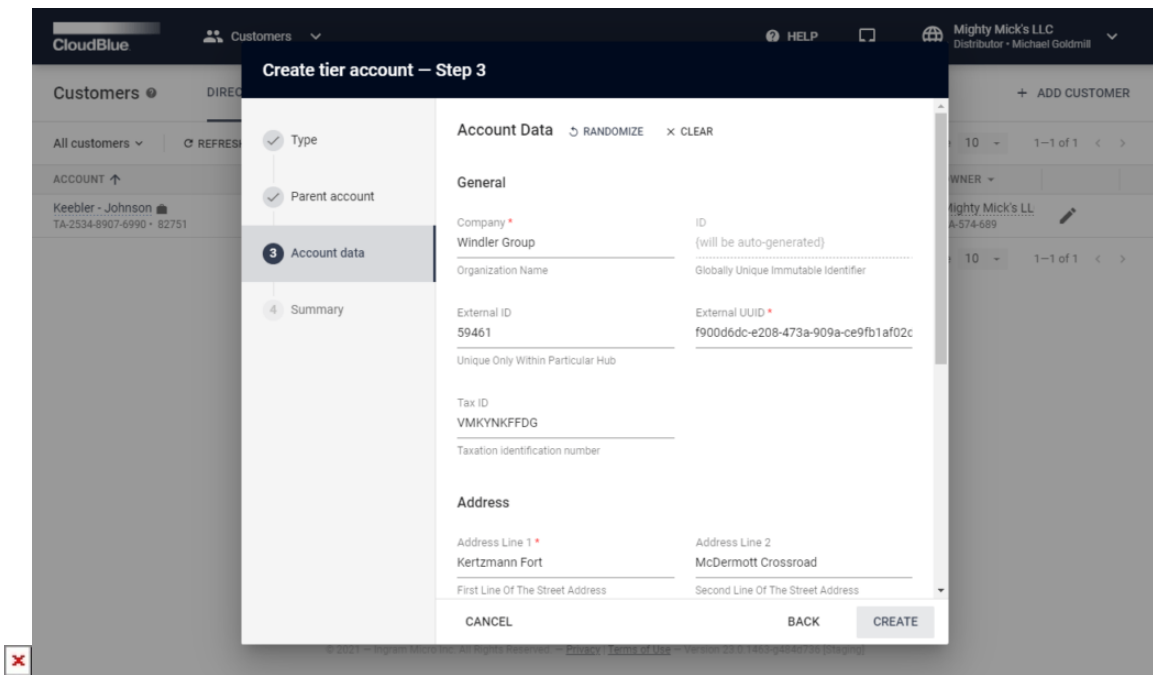
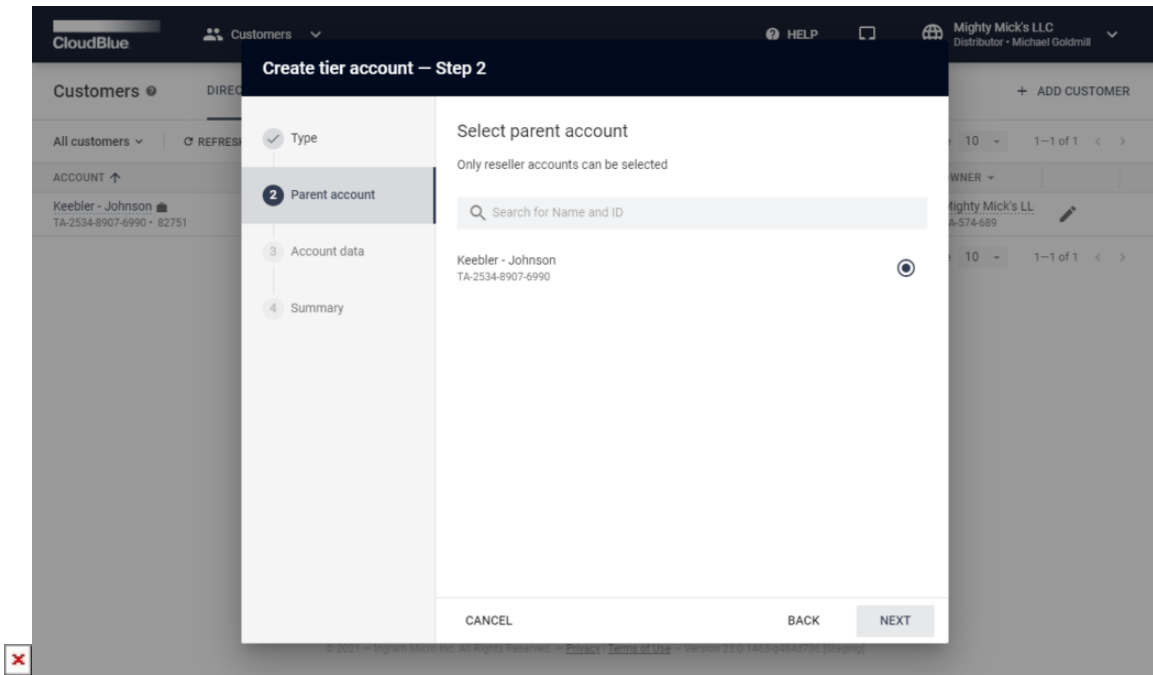
Click the **Create Customer** button to launch a tier creation wizard.

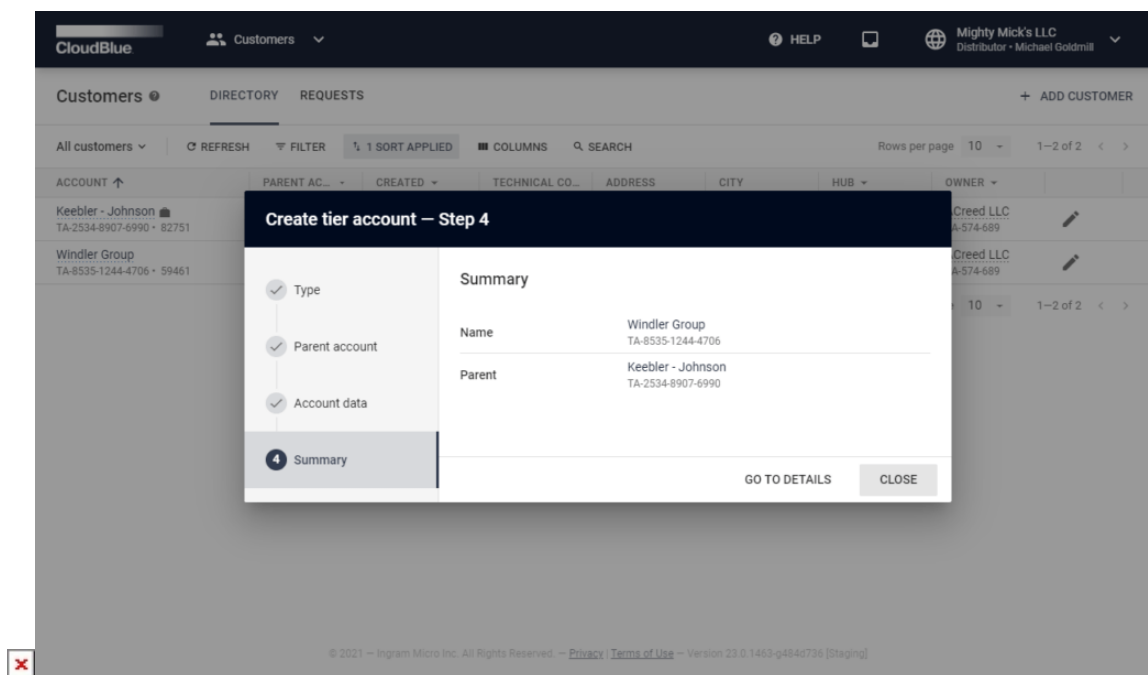
The screenshot shows the CloudBlue interface for the 'Customers' section. At the top right, there is a '+ ADD CUSTOMER' button highlighted with an orange border. Below the navigation bar, there is a table header with columns: ACCOUNT, PARENT ACCOU..., CREATED, TECHNICAL CO..., ADDRESS, CITY, HUB, and OWNER. The table body is empty, and a large grey circle with a checkmark icon is centered on the page. Below the circle, the text reads: 'No tier accounts. Manage tier accounts here. Please see our [documentation](#) to learn more.'

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The screenshot shows the 'Create tier account - Step 1' dialog box overlaid on the CloudBlue interface. The dialog has a dark header with the title 'Create tier account - Step 1'. On the left side, there is a vertical list of steps: 1 Type, 2 Parent account, 3 Account data, and 4 Summary. The 'Type' step is selected. The main area of the dialog is titled 'Select type' and contains two radio button options: 'Customer' (selected) with the subtext 'Customer account type', and 'Reseller' with the subtext 'Reseller account type'. At the bottom right of the dialog, there are 'CANCEL' and 'NEXT' buttons.

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Follow the wizard steps to successfully create a tier account:

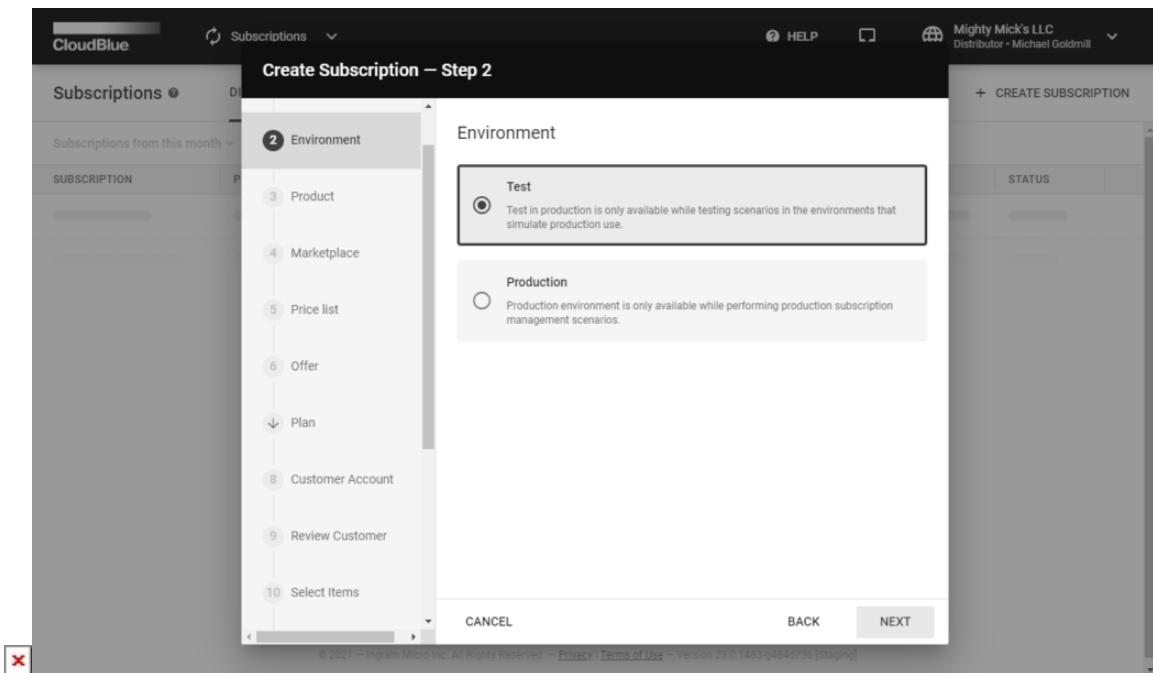
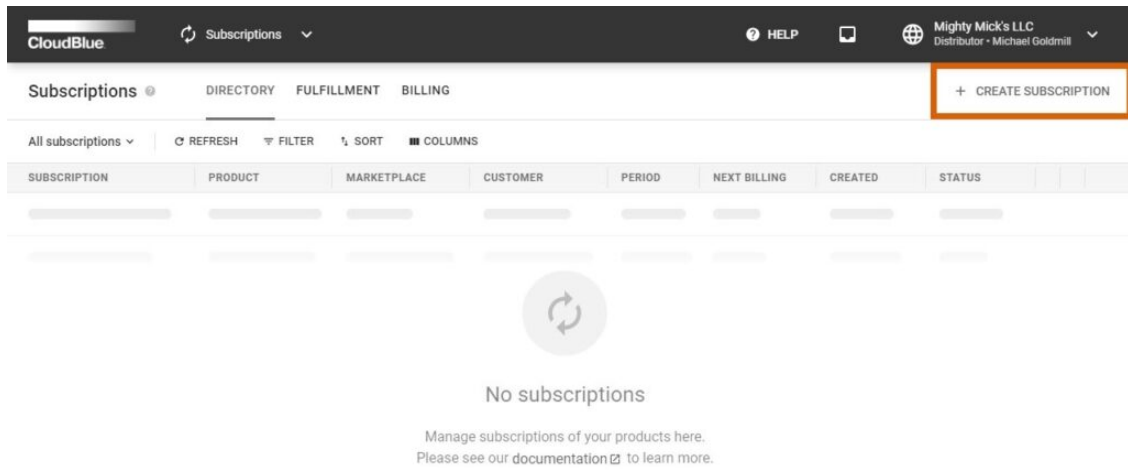
1. **Type:** Select either *customer* or *reseller* account type. Note that *customer* account should have at least one parent reseller.
2. **Parent account:** Choose a parent account from the list. In case the *reseller* type is selected
3. **Account data:** Specify the account data in the following form. Note that you can randomize data and clear the filled form by using corresponding buttons on the user interface.
4. **Summary:** The system provides a summary as a final step; therefore, your tier account will be successfully created. Click *Go to Details* to review your created tier account data. Otherwise, click *Close* to close the summary.

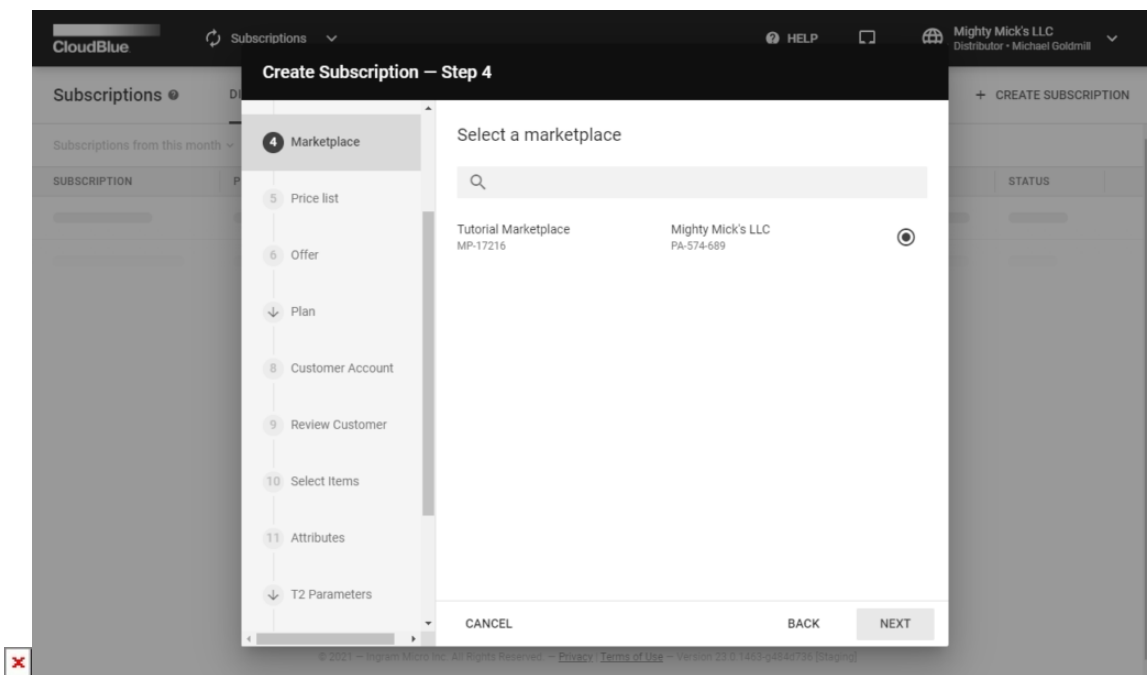
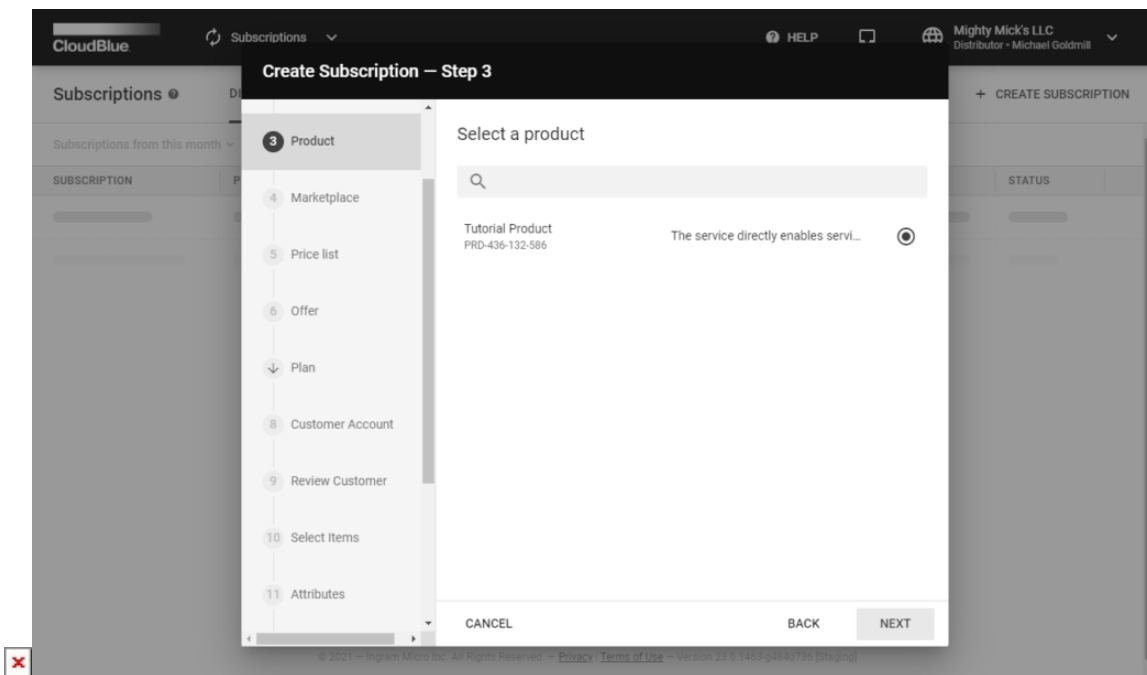
In this scenario, *Mighty Mick's LLC* created one reseller account and one customer account. Therefore, the system allows to manually generate a subscription as described below.

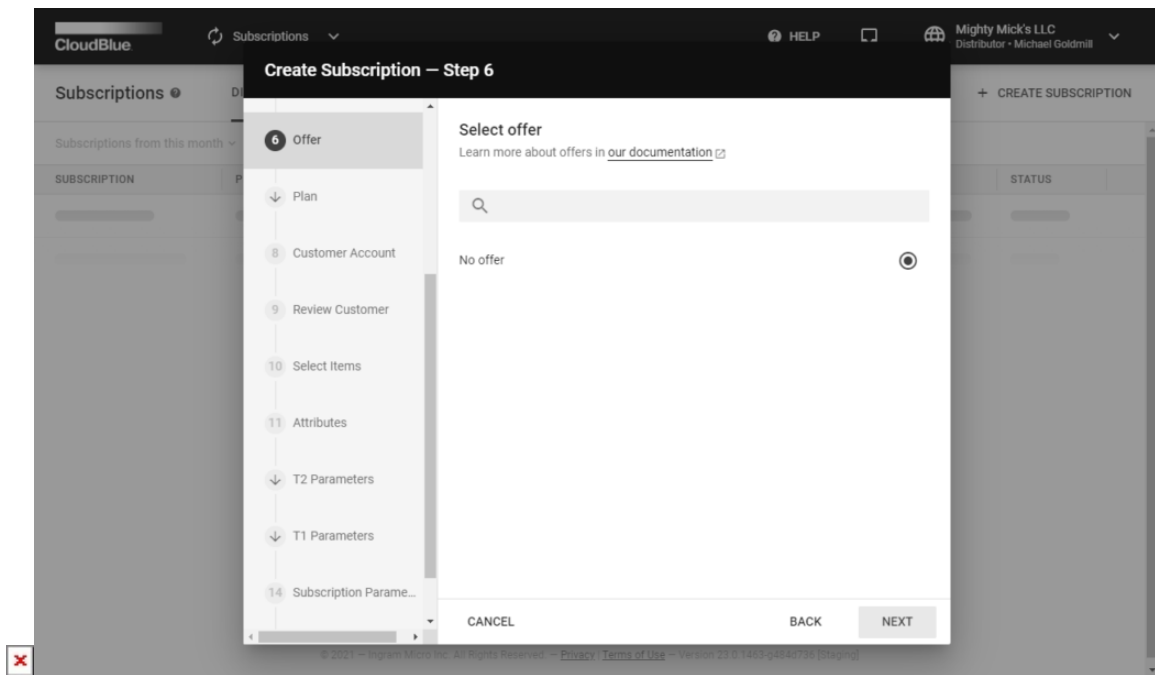
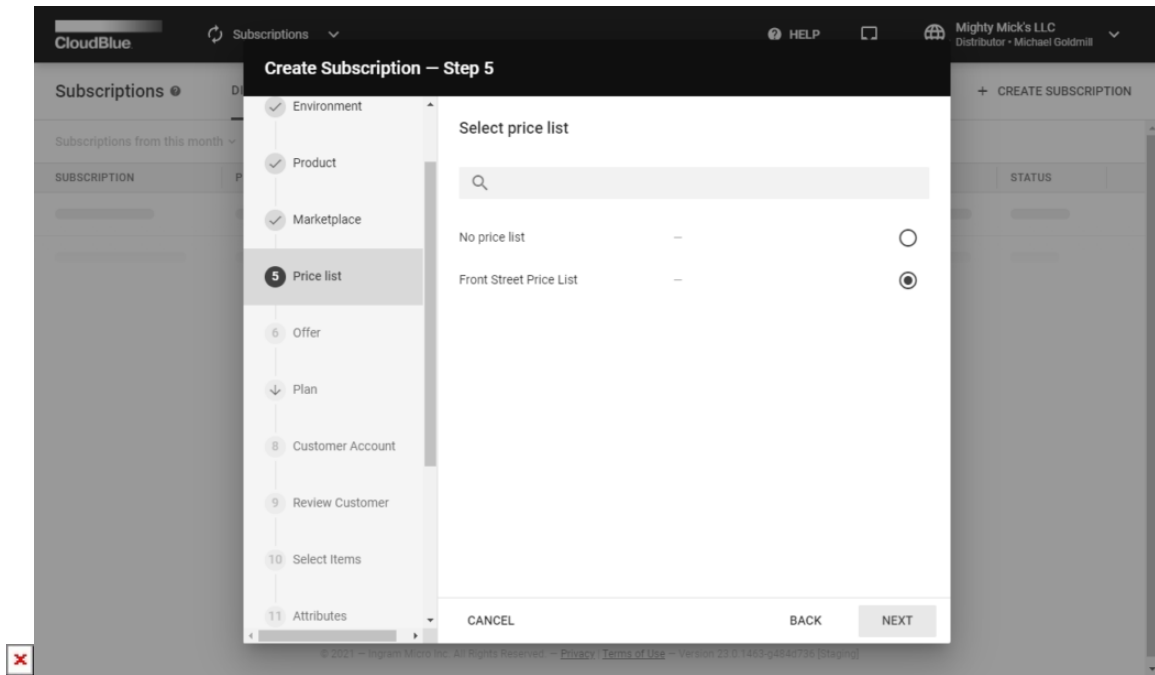
Subscription Creation

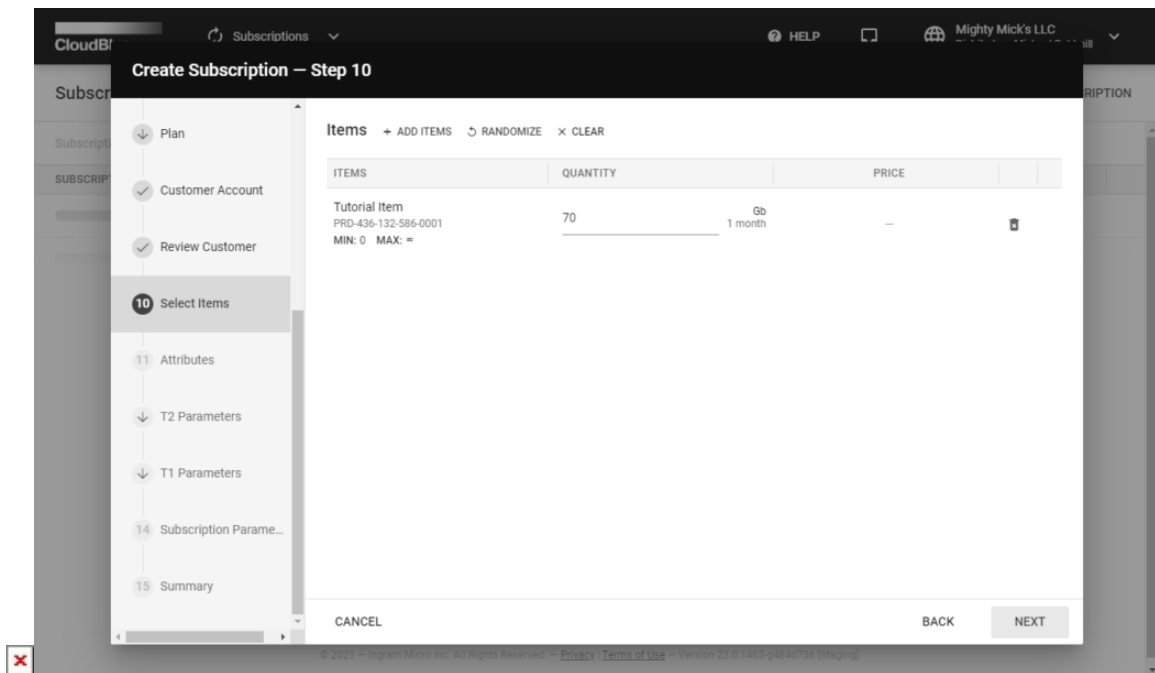
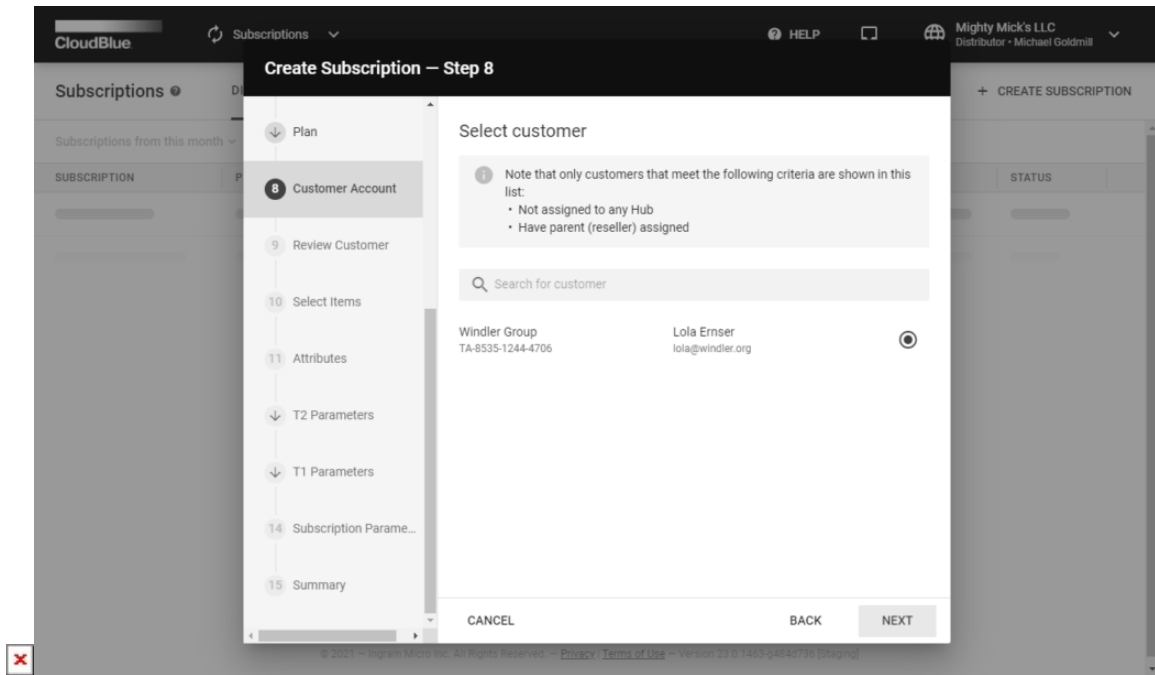
Product orders are automatically transferred from a Distributor's hub to the platform via *Connect API*. Note, however, that Distributors can create subscription requests manually via a *subscription creation wizard* from the Subscriptions module.

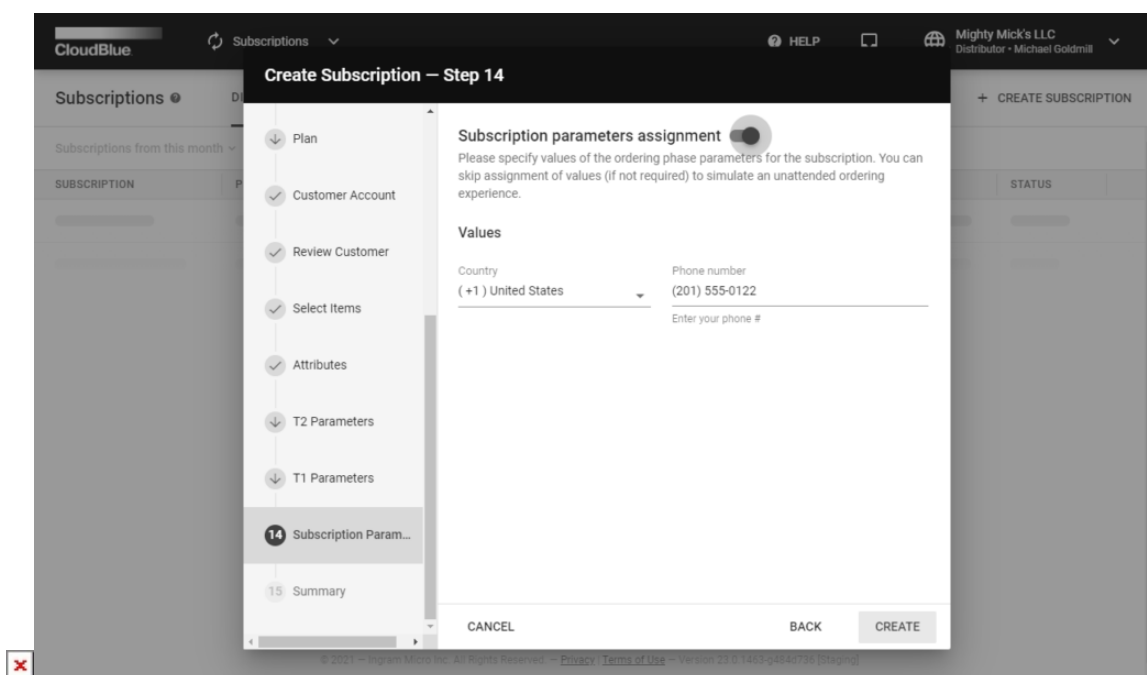
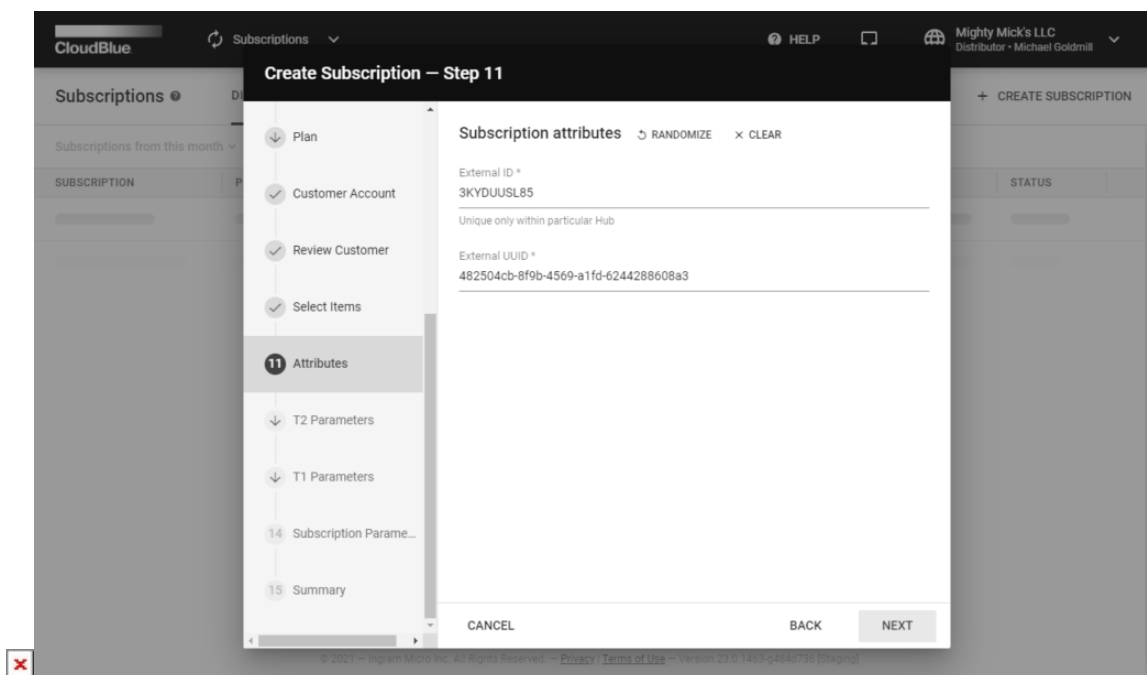
Click **Create Subscription** to launch Follow the wizard steps to successfully generate a subscription on the Connect platform:











In this scenario, Mighty Mick’s LLC selects the *testing* environment since their subscription is generated for testing purposes. Mighty Mick’s LLC also specifies the *created marketplace* and selects required *tutorial product*.

This product features a price list. Therefore, Mighty Mick’s LLC selects this price list within the corresponding form. However, the aforementioned product doesn’t include any *offers*, and *plans*. Therefore, Mighty Mick’s LLC keeps these forms intact.



The wizard also prompts to *specify a customer account* and review it. Thus, Mighty Mick's selects a customer account created earlier.

Next, the wizard prompts to specify required items and their quantity. Note that the system allows editing selected items and randomizing item data by using corresponding buttons on the user interface.

Mighty Mick's LLC also specifies subscription attributes (*External ID* and *UUID*) within the corresponding step. The selected product doesn't have any tier parameters and the wizard skips corresponding steps.

Lastly, the wizard prompts to specify required ordering parameters. Thus, Mighty Mick's LLC provides the parameter value (phone number) and finalizes the subscription creation by clicking the *Create* button.

As a result, the system generates a new subscription and a fulfillment request that should be processed by associated Vendors.



Vendor actions are required!

Vendors are required approve this request and consequently activate the created subscription. Note that in case of an error, Connect enables Vendors to reject requests and terminate subscriptions.

In case you need more detailed instructions on how to use the aforementioned wizard and successfully generate a subscription, proceed to the Subscription Creation article within the Subscriptions module documentation on the Connect Community page.

Accessing Active Subscriptions

Once Vendors approve a fulfillment request on the Connect platform, Distributors receive a notification email with a link to this request. For example, an email that *Mighty Mick's LLC* received from the system looks like this:

```
Purchase Status: Approved
ID: PR-6970-4505-4622-001
Subscription ID: AS-6970-4505-4622
Vendor: Front Street Inc
Product: Tutorial Product (PRD-013-767-828)
Created: 6/25/21, 8:03 AM
Completed: 6/26/21, 6:01 AM
```

In case Distributors should manually provision specified fulfillment parameters value to customers, Distributors can access required parameter data as described below.



Click on the **Subscription ID** from your notification email to access subscription. Alternatively, navigate to your subscription via the **Subscriptions** module on the Connect platform.

CloudBlue Subscriptions HELP Mighty Mick's LLC Distributor - Michael Goldmill

Subscription details ACTIONS

Status	Subscription	Request In Progress	Product	Marketplace
● Active	AS-6493-4392-4303 Recurring	-	Tutorial Product PRD-640-516-332	Tutorial Marketplace MP-38661

CONTROL PANEL RESERVATION PAY AS YOU GO **PARAMETERS** DETAILS TIERS FULFILLMENT BILLING

Subscription
AS-6493-4392-4303

Ordering VIEW	Fulfillment VIEW
Phone Number phone +12015551020	License Key license QZ5RhG82ugx0PQty6n

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CloudBlue Subscriptions HELP Michael Goldmill
Mighty Mick's LLC

Subscription details ACTIONS

Status	Subscription	Request In Progress	Product	Marketplace
● Active	AS-2329-4388-2680 Recurring	-	Tutorial Product PRD-640-516-332	Tutorial Marketplace MP-38661

CONTROL PANEL RESERVATION PAY AS YOU GO **PARAMETERS** DETAILS TIERS FULFILLMENT BILLING

We are happy to provide you the Cloud Service - an ultimate solution for your company. Stop using the legacy on-premises solution on your computer. Move to the cloud with our help.

Tutorial Product Activation

The following provides tutorial product activation license key and our phone number.

License Key: QZ5RhG82ugx0PQty6n

+12015551020

Thank you for cooperating with Front Street Inc!

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Make sure that your subscription status is **Active**. In general, required parameter values are presented within the **Parameters** tab.



In this scenario, required fulfillment parameter values are also specified within the *subscription activation* template from the **Control Panel** tab. Thus, Mighty Mick's LLC can provide a required license key for the customers.

Conclusion

Therefore, the *Order Flow* for the created subscription will be successfully concluded. Access the Subscription module documentation in case you want to learn more about subscriptions, fulfillment requests, their types and their states on the CloudBlue Connect platform.

By finishing this tutorial, Distributors should acquire necessary skills to perform basic operations on the CloudBlue Connect platform. Use additional tutorials to see use case scenarios and guidelines that walk you through various operations and processes. Refer to the Modules articles on the Community page to find information on specific Connect module, extension, SDK, and more.