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Portals Interface



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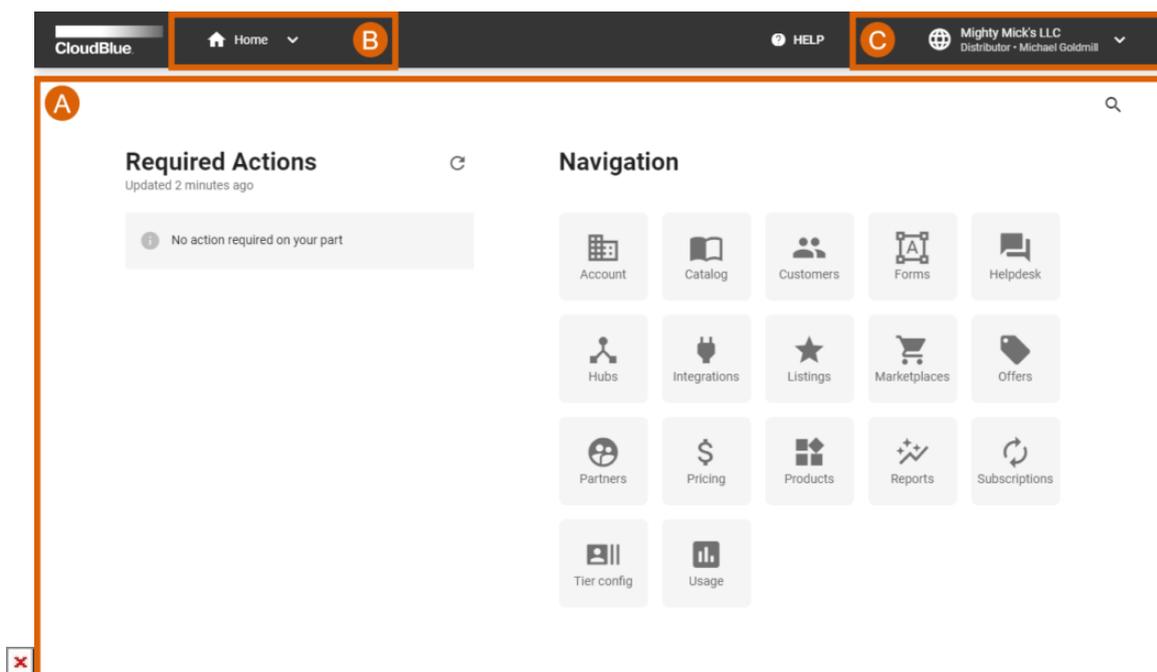
Overview

There are three primary Portal types that are implemented by Connect:

- **Distributor Portal** allows its users to onboard Vendors and Resellers, examine specified products, integrate into various ordering and billing systems, create catalogs for syndication operations, and so on.
- **Vendor Portal** enables its users to define their Product within the system, get connected to the marketplaces of Distributors, integrate into various provisioning and fulfillment systems, specify product offers, and more.
- **Reseller Portal**, as the name suggests, is used by Resellers for product distribution via their own marketplaces and other syndication operations.

Connect Portals are implemented using the same UI/UX framework. However, note that Connect supports end-to-end branding of its contents like color schema, domain names, logos, etc.

Portal layout consists of three primary areas:



□. **Main work area:** This is where most of the operations are performed. The actual layout depends on the navigation context.

□. **Navigation menu:** This menu is used to switch between different modules of the Connect Portal.

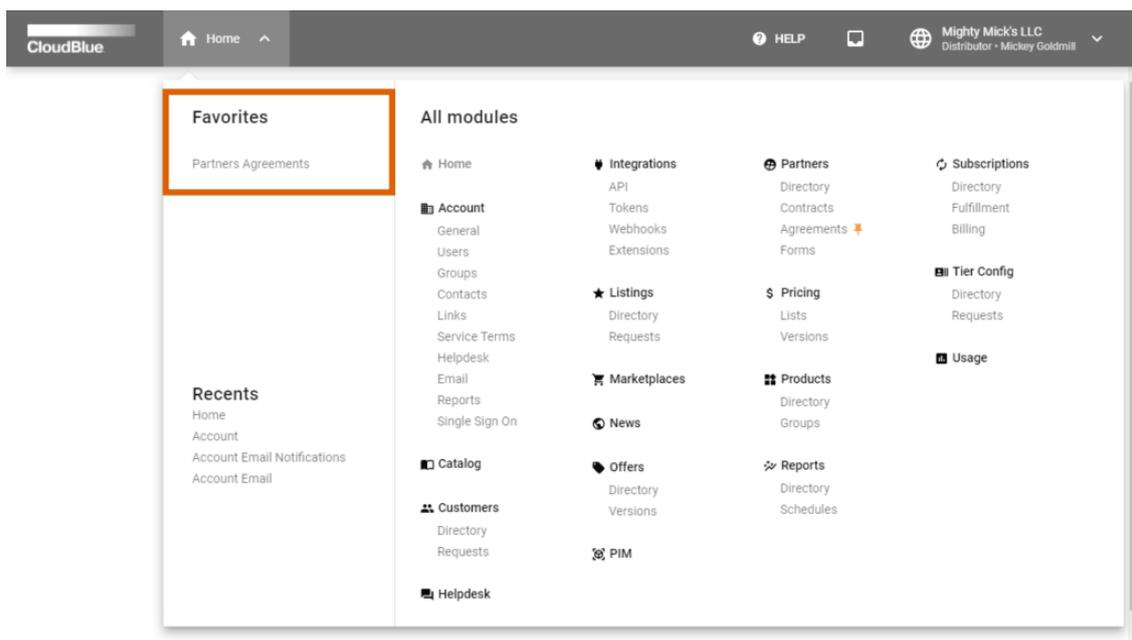
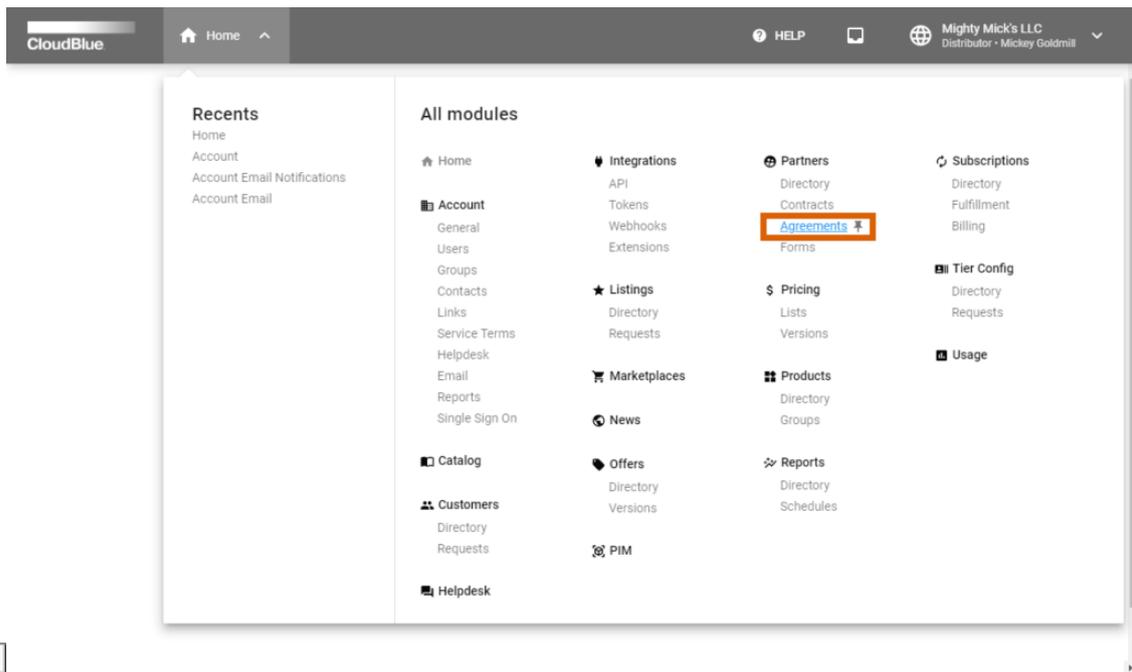
□. **Account selector & User profile:** A navigation element that enables users to access account selection menu and user profile settings.



Navigation Menu

Main navigation menu allows users to quickly switch between different sections within your Connect Portal. These sections are called *modules* on the CloudBlue Connect platform and they represent components that provide various functionalities and features. Refer to the Modules article for more information on available Connect modules.

Open the navigation menu to access your selected module, view your recently visited modules and tabs within modules. Pin required modules or tabs by using the corresponding pin icon:





Once your module or tab is pinned successfully, the system will display your pinned module or tab in the **Favorites** field. The system also enables you to unpin your module or tab and remove them from the *Favorites* field by clicking on the pin icon once again.

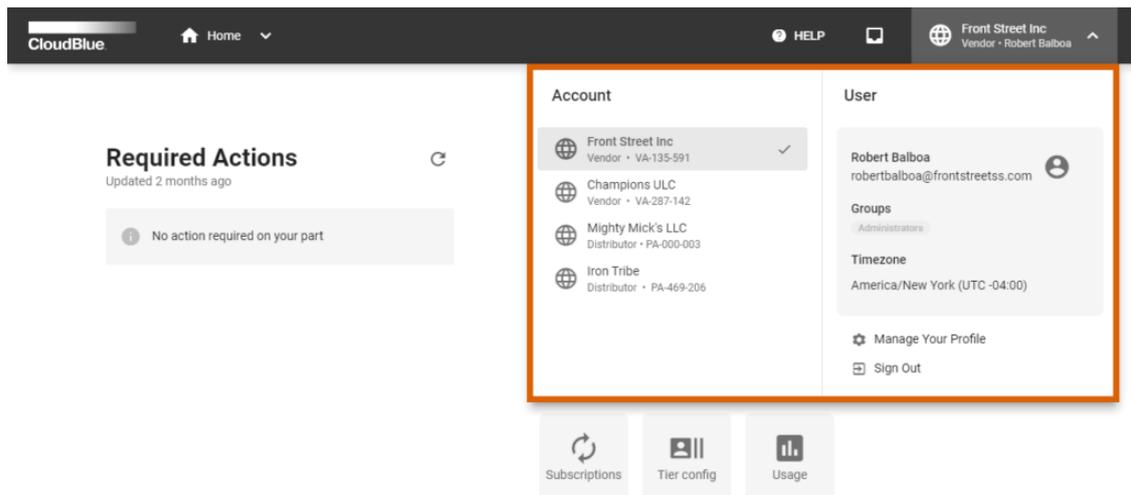


Note

The actual layout of the navigation menu and the amount of the available modules depends on your Portal type and your assigned permissions.

Account Selector & User Profile

This navigation element allows users to access their profile information and switch between multiple accounts in case they belong to more than one:



Account Selector displays your available accounts on the CloudBlue Connect platform. Note that the system marks your current selected account with a check mark.

User Profile data includes your specified name, email address, your groups, image, and time-zone. The system also allows managing your profile or signing out by using the corresponding buttons on the interface.



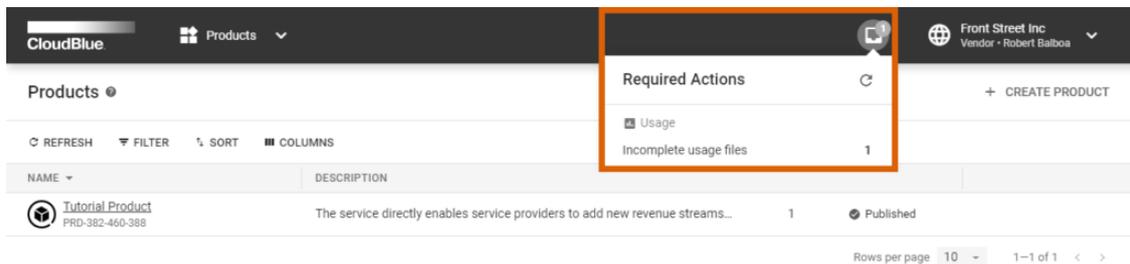


Note

Connect users might also not belong to any accounts at all. Namely, such users has limited access to various modules, but still has access to their profile information.

Required Actions

The system also helps Connect users to keep track of required actions on the platform from any module. Click on the *corresponding icon* on the user interface to display a list of your required actions:



Thereafter, select your *required action* from the list to access the module and object on the platform that require your attention. Note that the system also displays your required actions on the *Home* screen.

Help

The system also enables users to quickly access the links to the **Connect Community** page, **Getting Started** articles and **API reference**. Furthermore, you can a new Helpdesk case by selecting the **Get support** option.



The screenshot shows the CloudBlue Connect user interface. At the top, there is a dark navigation bar with the CloudBlue logo, a Home button, and a HELP button. The HELP button is highlighted with an orange box, and its dropdown menu is open, showing four options: Community portal, Getting started, API reference, and Get support. Below the navigation bar, there is a 'Required Actions' section with a message 'No action required on your part' and a 'Navigation' grid with icons for Account, Customers, Helpdesk, Integrations, Listings, Offers, Partners, Pricing, Products, Reports, Subscriptions, Tier config, and Usage.



Access the Contact Support article to learn how to create a new case. Note that Connect users can also report an issue or submit a request to their partners as described in the Helpdesk module documentation.