https://cloudblue.com

Documentation Getting Started Reseller Tutorial

Subscription Management

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Overview

Once Resellers received access to their selected product, the system enable such Resellers to examine specified items, offers, price lists, and other information via the *Products* module. More importantly, the system enables Resellers transfer product orders and register *customer* (and *reseller*) accounts on the CloudBlue Connect® platform.

In general, product orders are automatically transferred from a Reseller's hub to the Connect platform as subscriptions. Furthermore, the system also automatically processes customers and resellers as tier accounts. Note, however, that it is possible to manually create tier accounts and generate subscriptions via the *Customers* and *Subscriptions* modules on the Connect platform.

Creating tier accounts and subscriptions manually can be increasingly helpful for testing scenarios and for Resellers that didn't integrate their commerce system with the Connect platform yet. Follow the instructions below to manually register tier accounts and generate subscriptions.

Prerequisites

Make sure that the following prerequisites are met:

- Your CloudBlue Connect® account and your service contract are successfully activated.
- Required hub and marketplace are registered.
- Syndication Distributor approved your syndication contract.

Creating Tiers

Navigate to the **Customers** section to access the tier accounts list. The Connect platform usually registers your new customers and resellers automatically and displays your tier accounts in this list. Note, however, that the system allows creating tiers via a customer creation wizard as described below.

> ●
> Note
>
> The system requires creating at least one reseller account before creating customer accounts. Therefore, your created reseller account can be a parent tier account for your customers.

Click the **Create Customer** button to launch the wizard.

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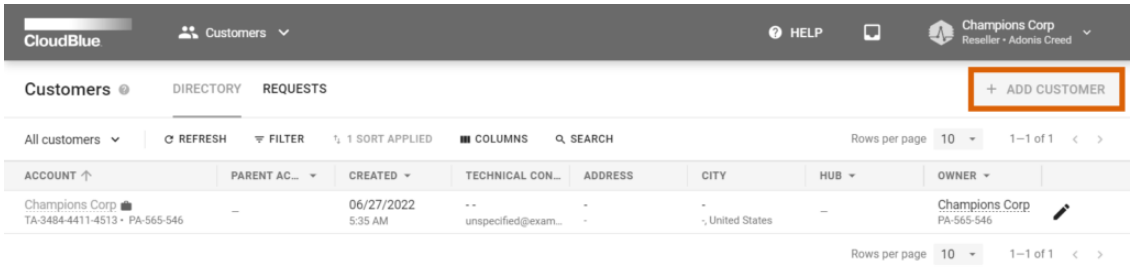

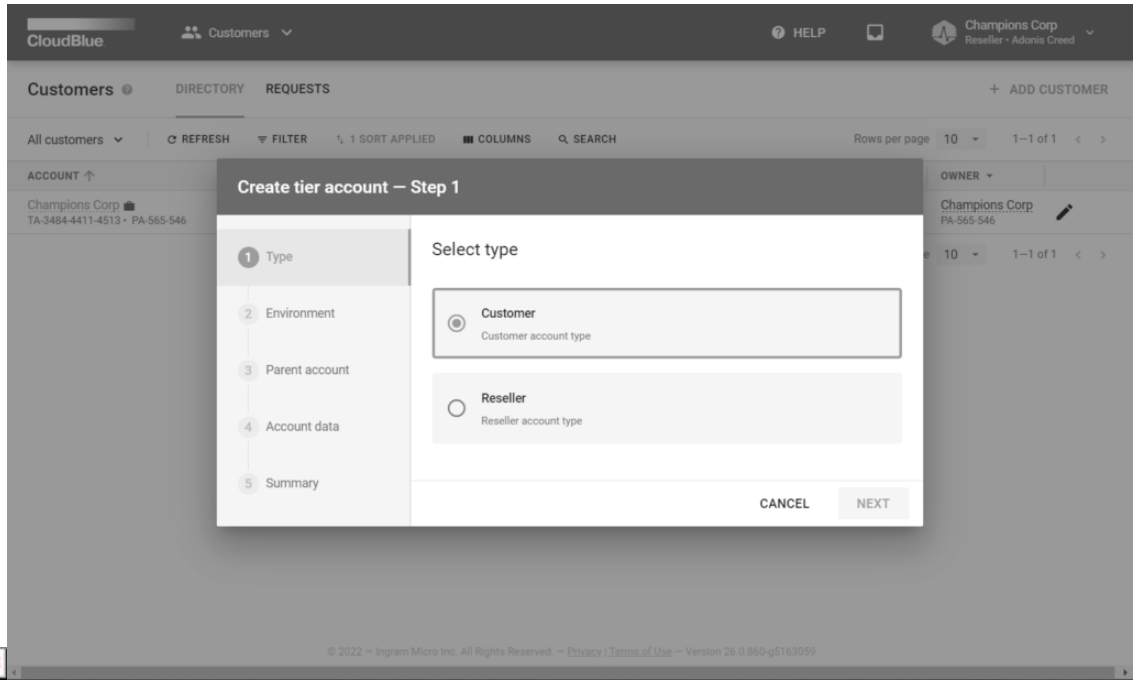

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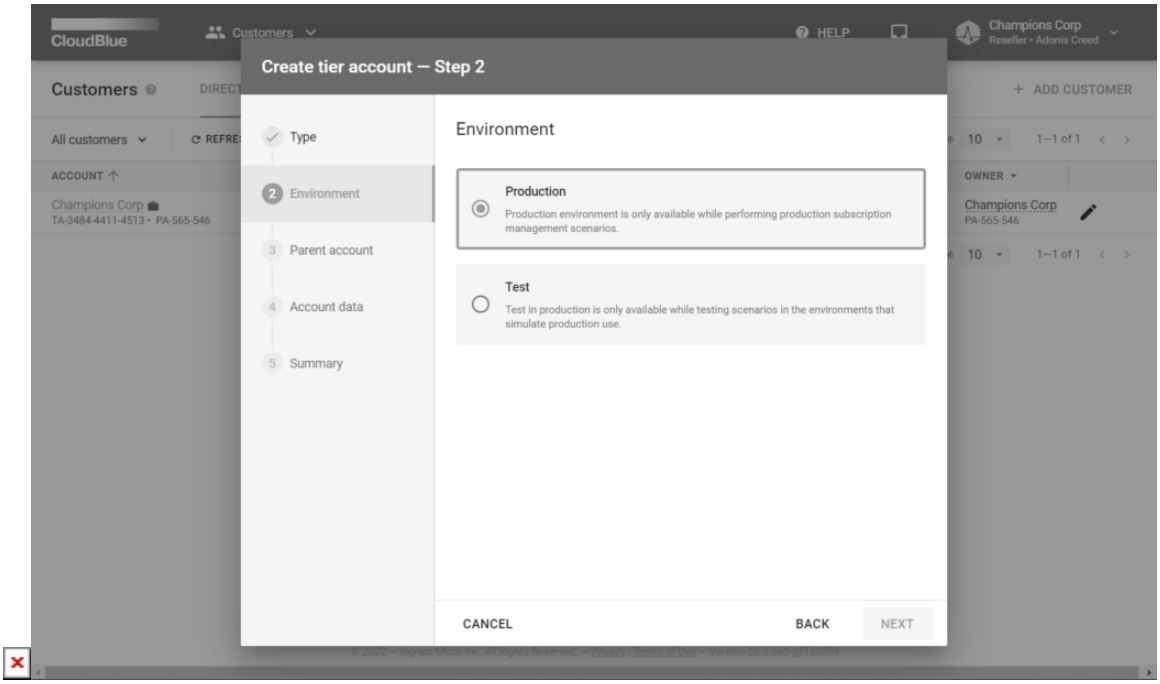

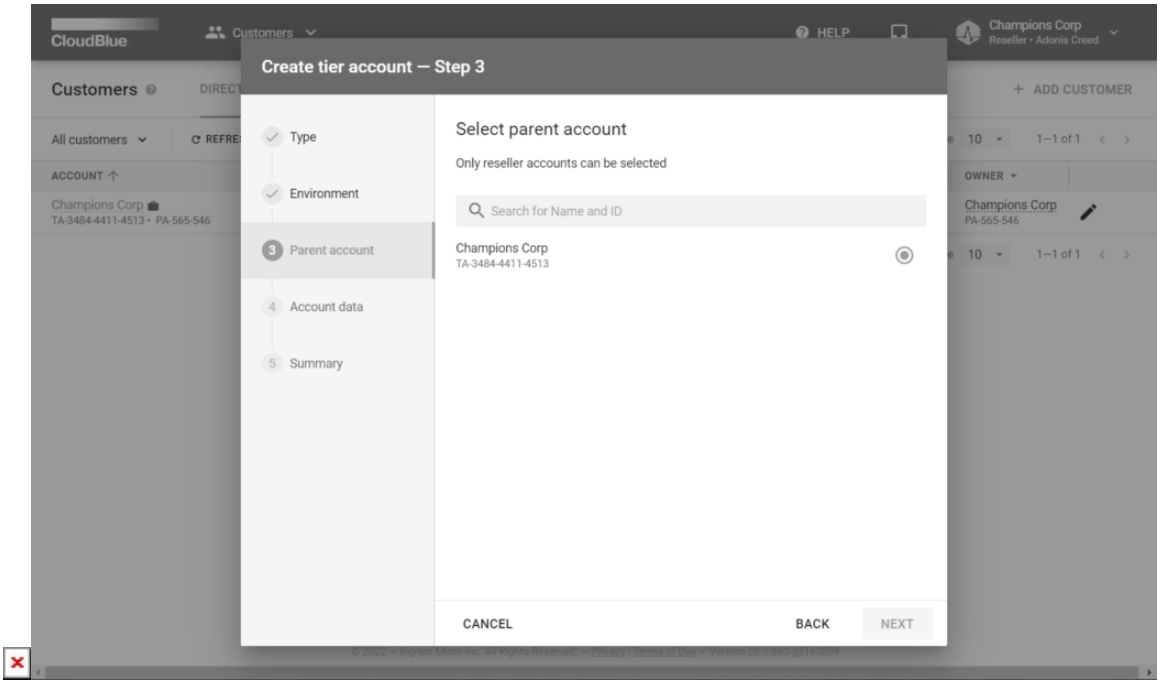

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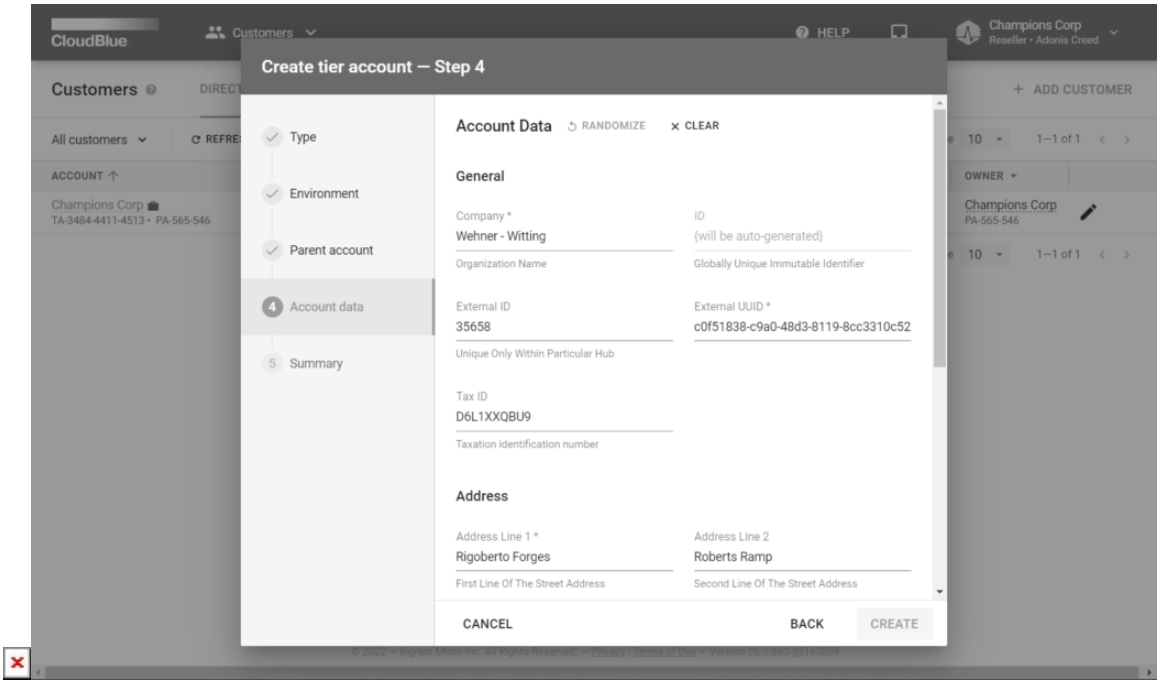

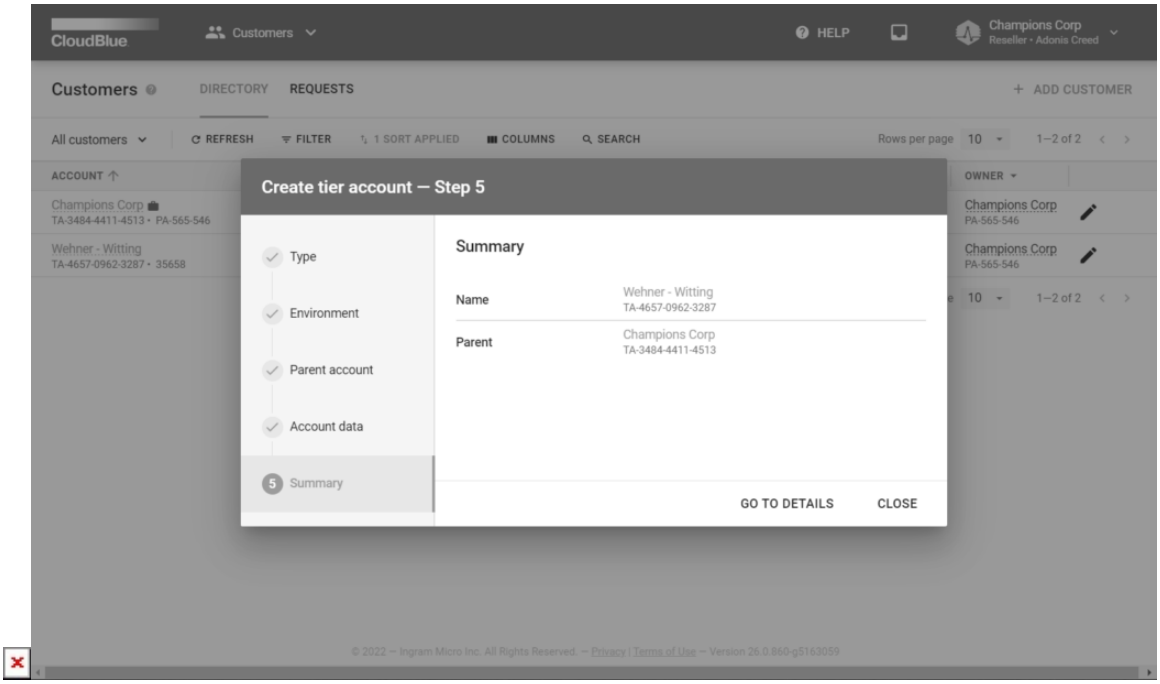

Follow the wizard steps to successfully create a tier account:

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, the system allows selecting

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None and assign your created tier as a partner account.

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, *Champions Corp* created one reseller account and one customer account. Therefore, this organization can manually generate a subscription as described below.

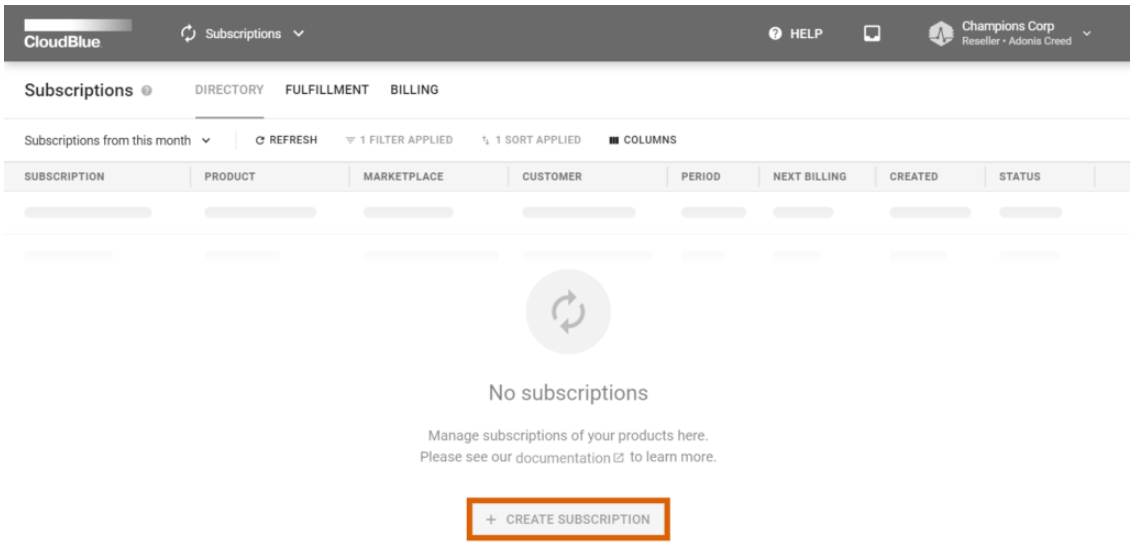
Creating Subscriptions

Once customer and reseller accounts are be successfully registered, Resellers can create subscriptions via a wizard in the *Subscriptions* module. The following guidelines showcase how to manually create subscriptions on the Connect platform.

> Syndication Contract must be approved!
>
> Make sure that your Distributor approved your syndication contract. Otherwise, it is impossible to perform the following operation. Check you enrolled contract status by navigating to the *Partners* module and accessing the *Contracts* tab.

Access the **Subscriptions** module and click the **Create Subscription** button to launch the wizard.

Follow the wizard steps to successfully generate a subscription:



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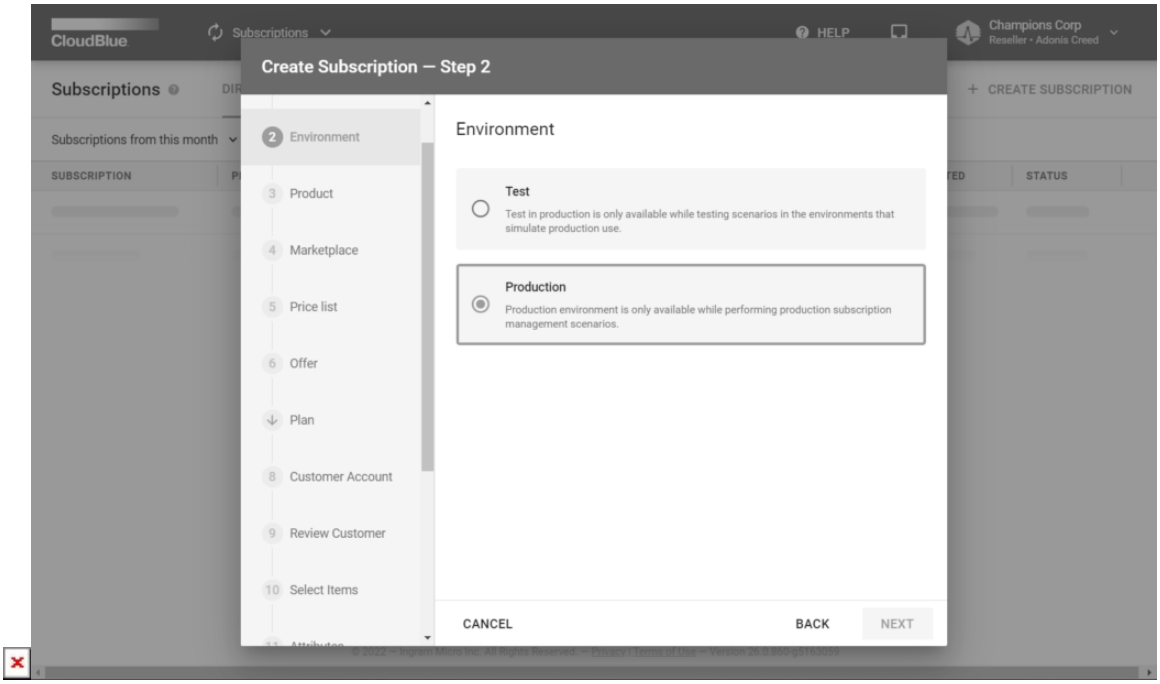

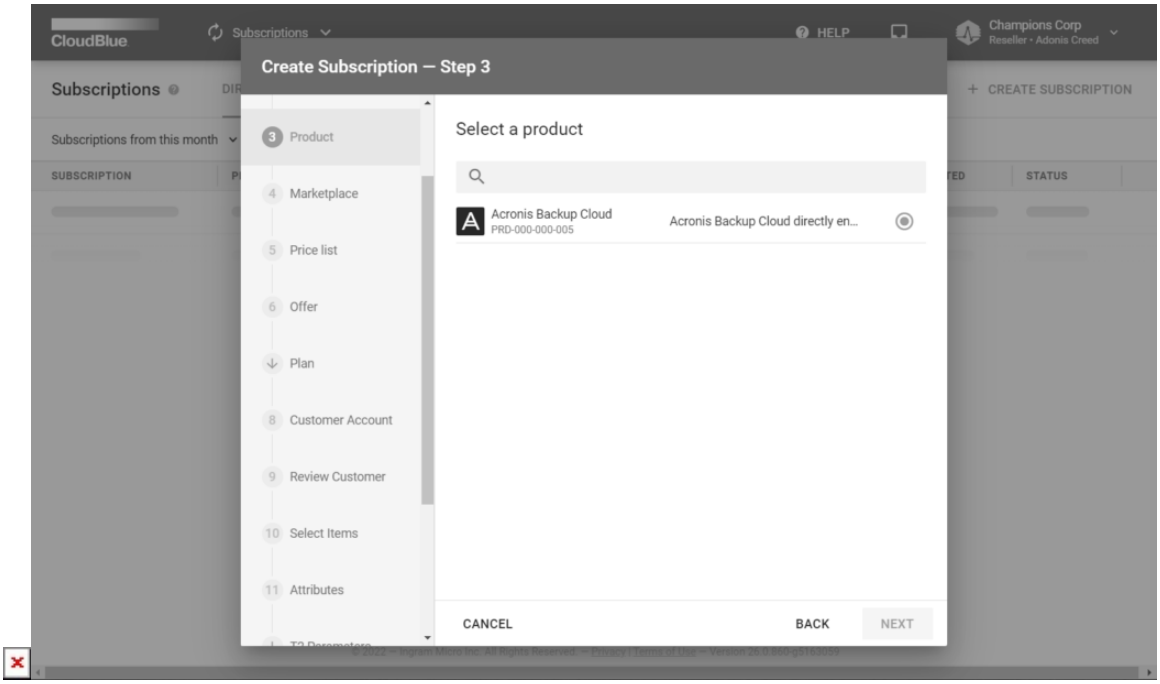

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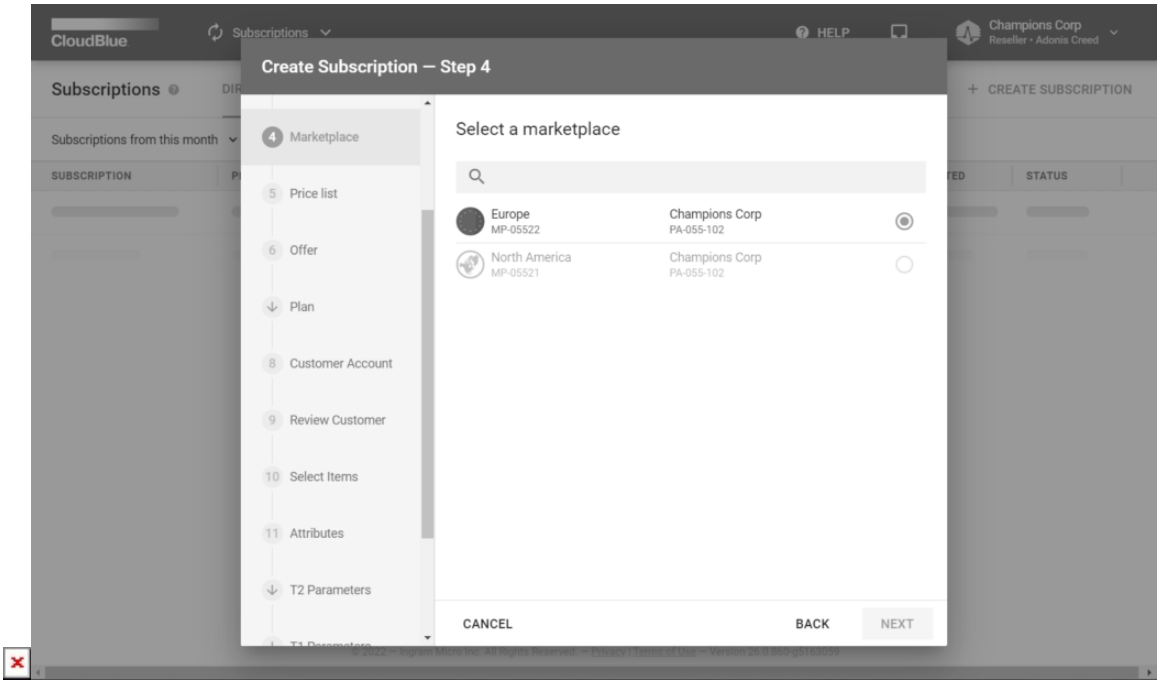

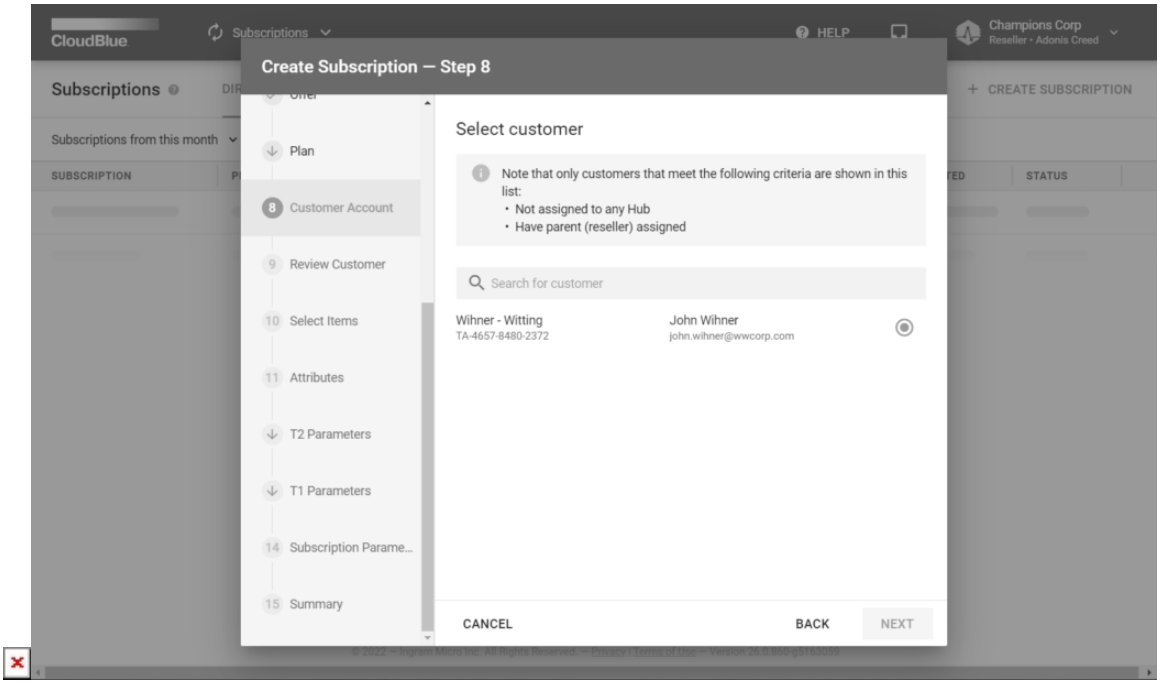

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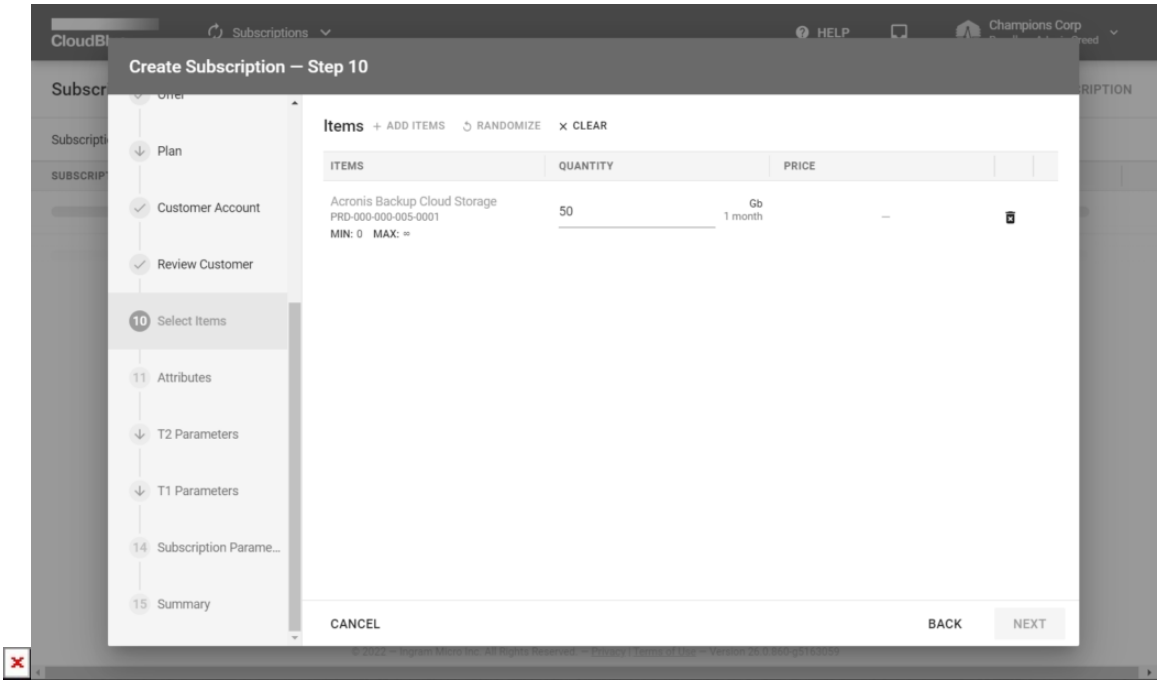

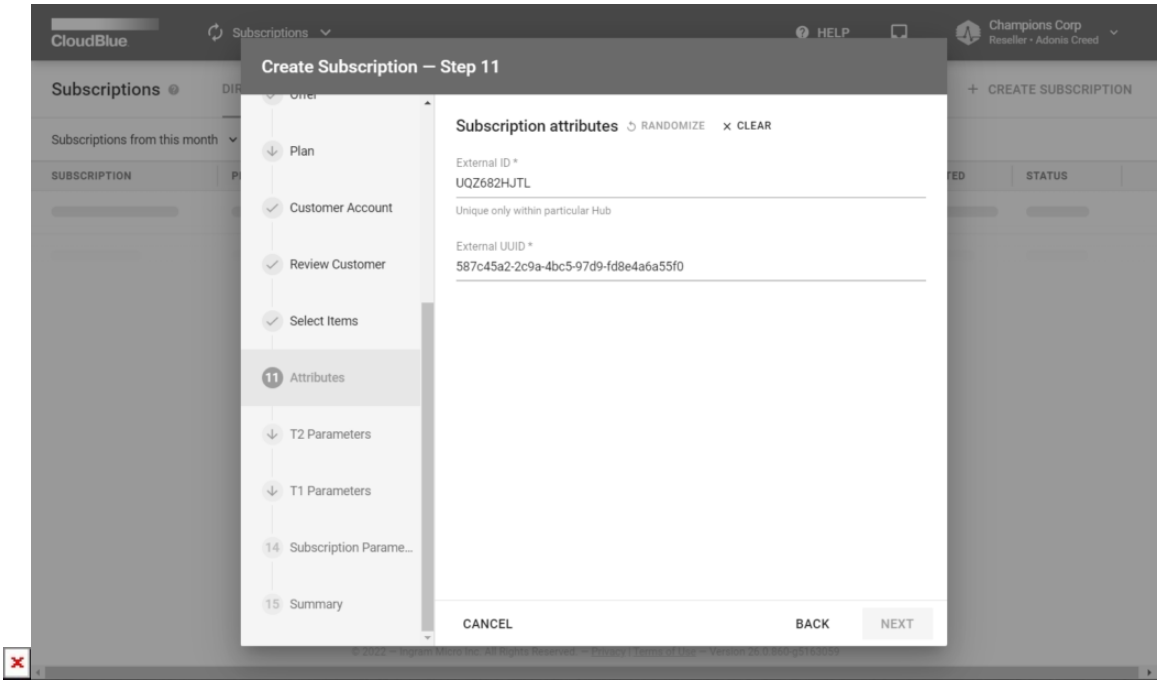

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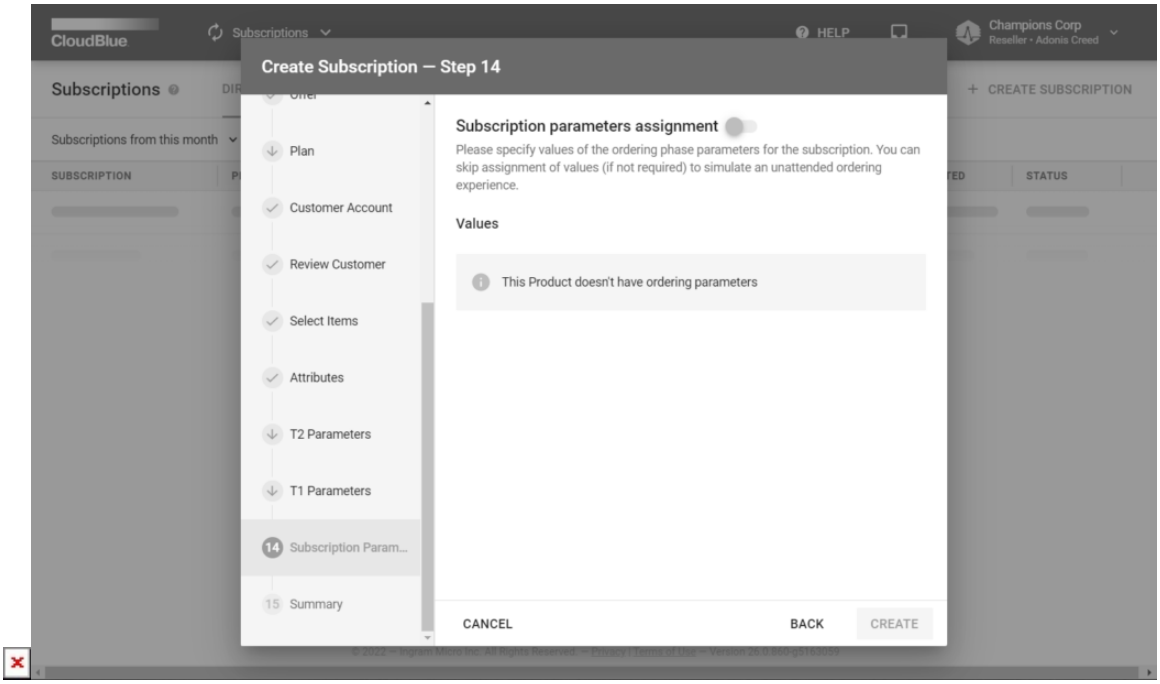

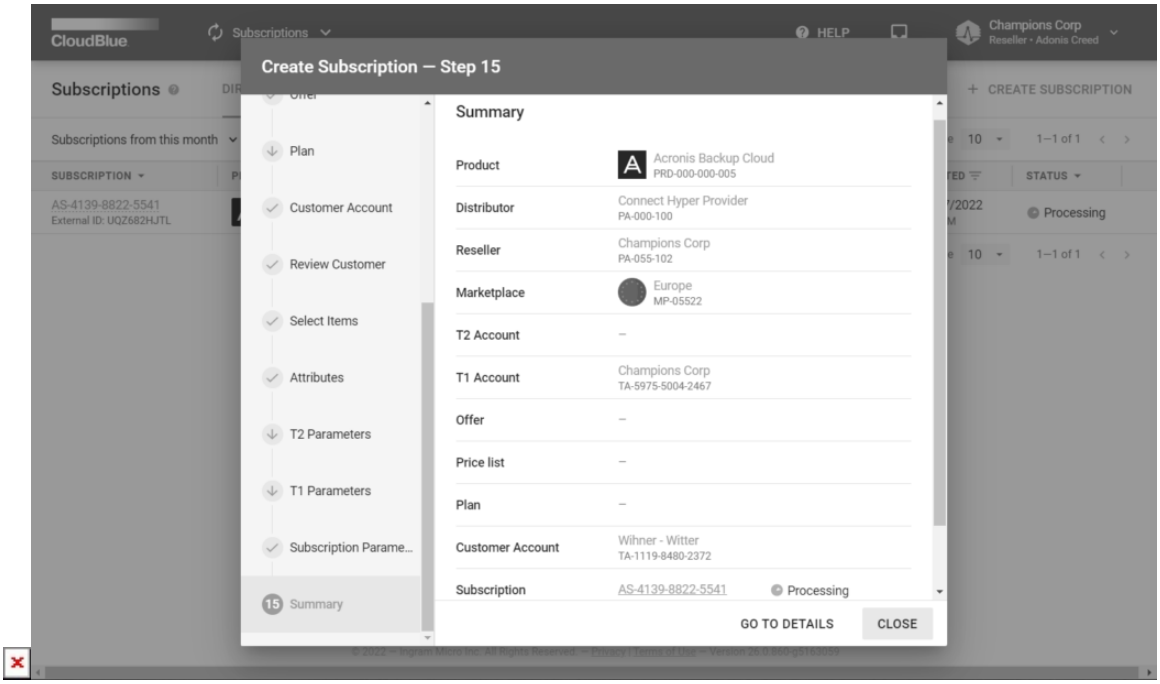

In this scenario, Champions Corp selects the *production* environment since their subscription is generated for business purposes. Champions Corp also specifies the *created marketplace* and acquired *product* Acronis Cloud Backup.

The aforementioned product doesn't include any *price lists*, *offers*, and *plans*. Therefore, Champions Corp keeps these forms intact.

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Next, the wizard prompts to *specify customer account* and review it. Champions Corp selected a customer account created earlier.

Champions Corp's customers requested 50 GB storage space of the Acronis Cloud Backup service. Thus, Champions Corp adds a *storage item* and enters "50 GB" as the *quantity* value.

Lastly, Champions Corp specifies subscription attributes in the corresponding step. The selected product doesn't provide any ordering parameters. Therefore, Champions Corp keeps this form intact and proceeds with the subscription creation.

The wizard provides a summary as the final step. Click **Go to Details** to access your created subscription details or click **Close** to close the summary.

Conclusion

Once Resellers successfully register required tier accounts and generate subscriptions for their partners, the Order Flow will be initiated. In case your created subscription is activated, this business flow will be successfully completed.

Therefore, Resellers acquired necessary skills to perform basic operations on the CloudBlue Connect® platform. Access the Subscription module documentation in case you need more information on subscriptions, subscription requests and the provided user interface. Refer to the Customers module documentation if more details about customer or reseller accounts.

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