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Documentation Modules

Customers

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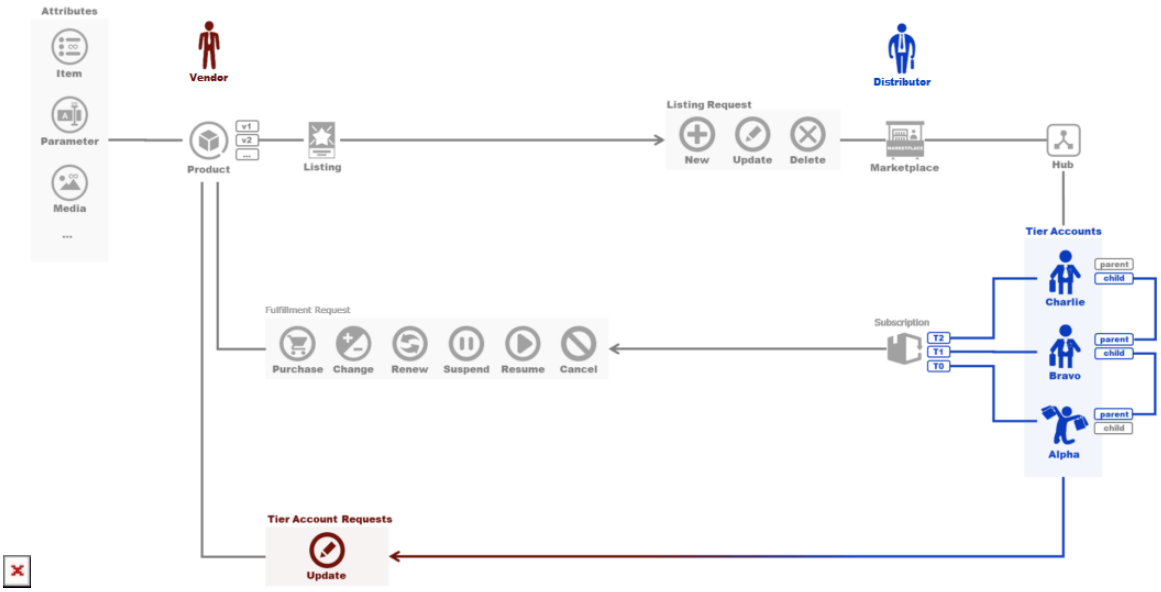
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Video Tutorial

Overview

The Customers Management module enables Distributors and Vendors to create, review, and manage *Tier Accounts* and *Tier Account Requests* on the CloudBlue Connect® platform.

The following schematically illustrates and describes the Customer management module on the Connect platform:



Use the Customers module to create a database that contains *tier account* (reseller or customer) information. Created tier account data is necessary for Tiers Configuration and consequently required for generating or activating subscriptions on the Connect platform. This data include company names, addresses, contacts and other account attributes.

Furthermore, the Customers module can be used to build hierarchical structures with your created accounts. For example, customer account can have a parent reseller account that can also have a parent account. Restructure tier account hierarchy as it is necessary for your business.

Note that this module is also used by Distributors and Vendors to consolidate tier accounts information and accounts structure via *tier account requests*. In case any provided account information is edited, the system generates a new tier account request.

Therefore, the Customer module is increasingly helpful for creating tier accounts database, managing your tier accounts hierarchy, and keeping track of accounts updates and adjustments.

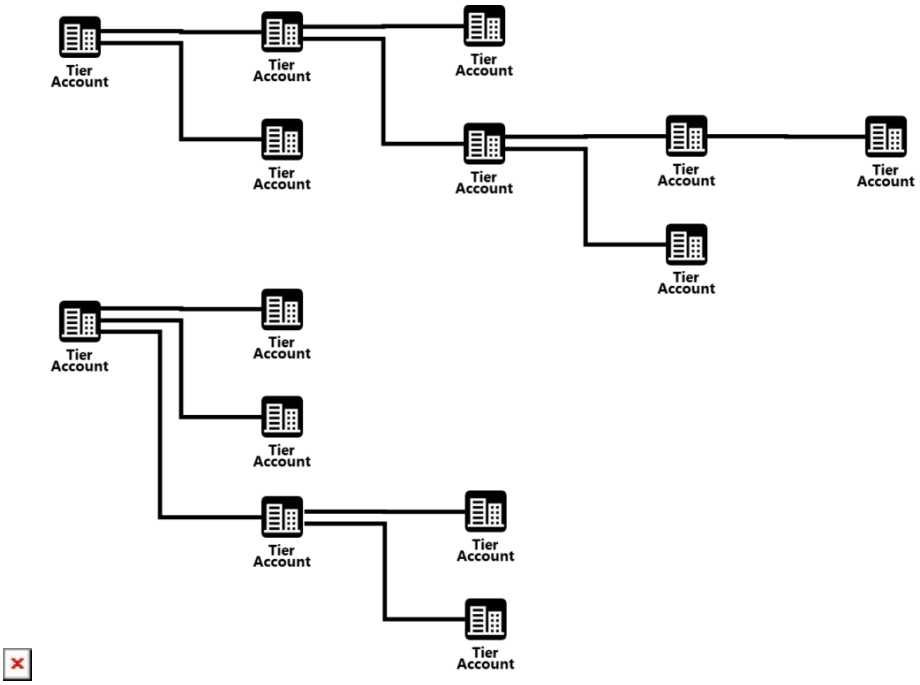
Tier Accounts

Tier accounts represent objects that store customer or reseller account attributes. Creating tier accounts is required to specify

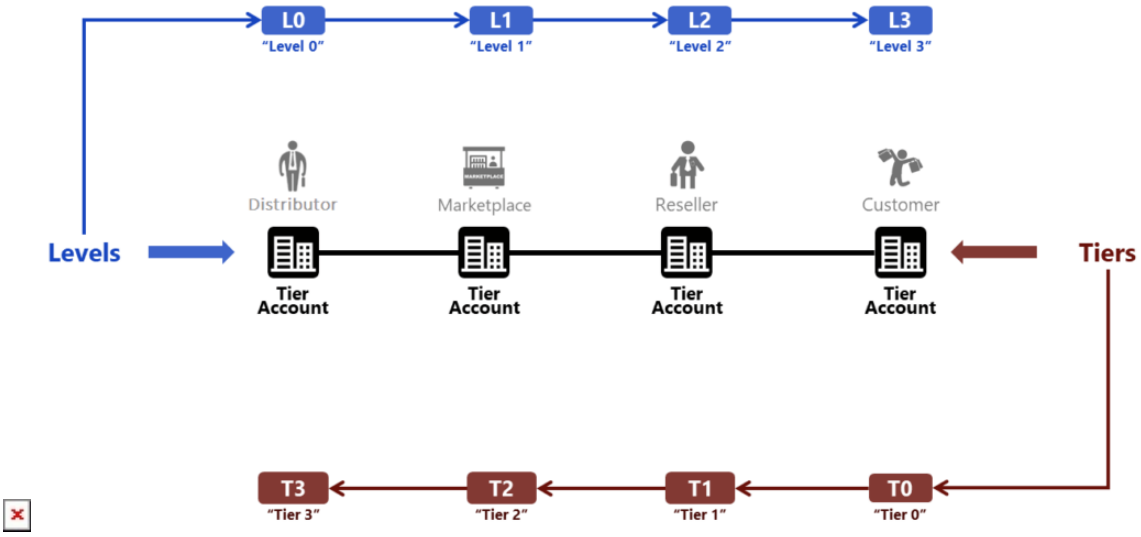
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customer and reseller information for subscriptions that are generated on the CloudBlue Connect® platform. Additionally, note that that tier accounts are used to indicate the *current state* of reseller and customer data.

Note that tier accounts can form hierarchical structures with multiple independent trees as schematically illustrated below:



Furthermore, there are two possible ways of addressing elements within each hierarchy as displayed in the diagram below:



- **Levels** represent relative addressing from the "**root**" of the hierarchy (blue in the diagram above).
- **Tiers** represent relative addressing from the "**leaf**" of the hierarchy (red in the diagram above).

CloudBlue Connect® **primarily utilizes Tier-based addressing schema** for customer and reseller data, hence the object

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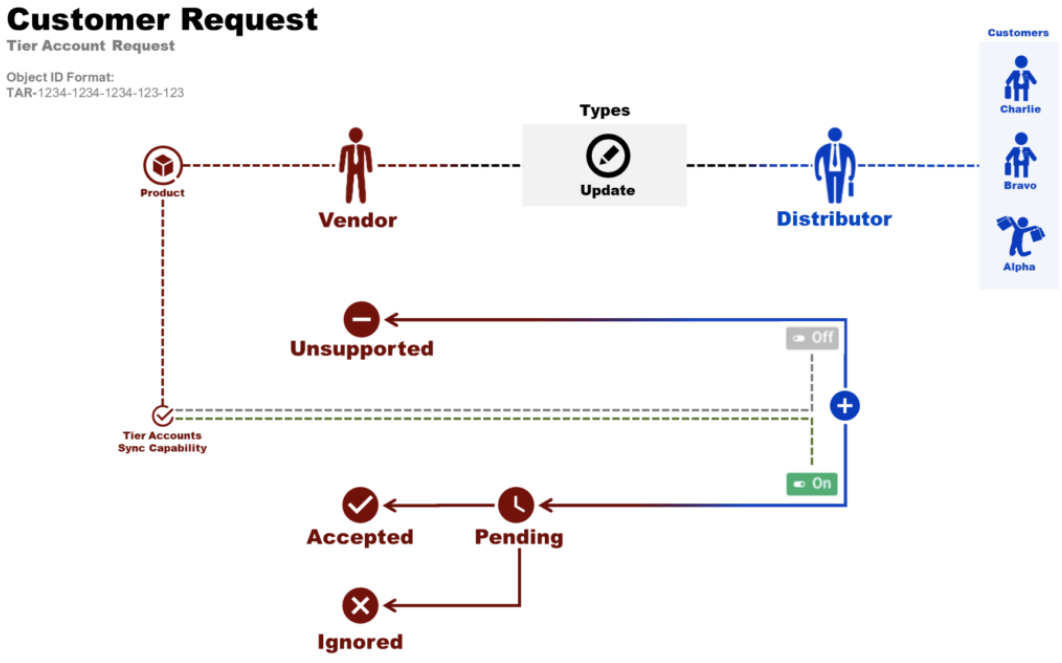
name *Tier Account*.

Tier Account Requests

Tier Account Requests (also referred as *Customer requests* or *TAR*s) are objects that store *changes* to the customer and reseller account object attributes. These requests enable Distributors and Resellers to consolidate tier account data with Vendors. Therefore, Partners can keep track of all tier account changes and updates.

> Information
>
> Note that the Connect platform can generate several tier account requests for one tier account. Namely, in case there are changes within a tier account that is associated with several product subscriptions as a customer or a reseller (Tier 1 or Tier 2), the system creates a tier account request per each product this tier account is interconnected with. However, if this tier account is not associated with any product subscription, the system will not generate any tier account requests.

The diagram below provides tier account request workflow on the CloudBlue Connect® platform.



Once a request to change or update a tier account is created, the system transfers the tier account request to the *Pending* state. Thereafter, this request can be *accepted* or *ignored* by a Vendor.

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Enable Tier Accounts Sync

Note that in case the **Tier Accounts Sync** capability is disabled, your generated tier account request is assigned to the **Unsupported** state and automatically ignored by the system. Make sure to switch on this capability from the Product Settings menu. Therefore, Vendors will be able to process these requests.

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