https://cloudblue.com

Documentation Modules Customers

Customers Interface

This article has been generated from the online version of the documentation and might be out of date. Please, make sure to always refer to the online version of the documentation for the up-to-date information.

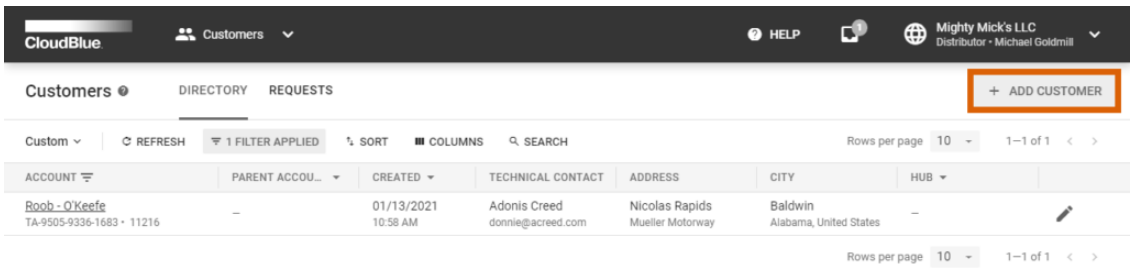
Auto-generated at November 23, 2026

© Ingram Micro, Inc. All Rights Reserved.

The following describes user interface and general operations with the Customers module on the CloudBlue Connect® platform. The general operations include creating a new tier account, editing account data, accepting tier requests, and more.

Creating Tier Accounts

Proceed to **Customers** module and click the **Add Customer** button from the **Directory** tab to launch a *Tier Account Creation* wizard.



CloudBlue Connect © 2021 – Ingram Micro Inc. All Rights Reserved. – Privacy | Terms of Service - Version 22.0.1738-gf843fc9

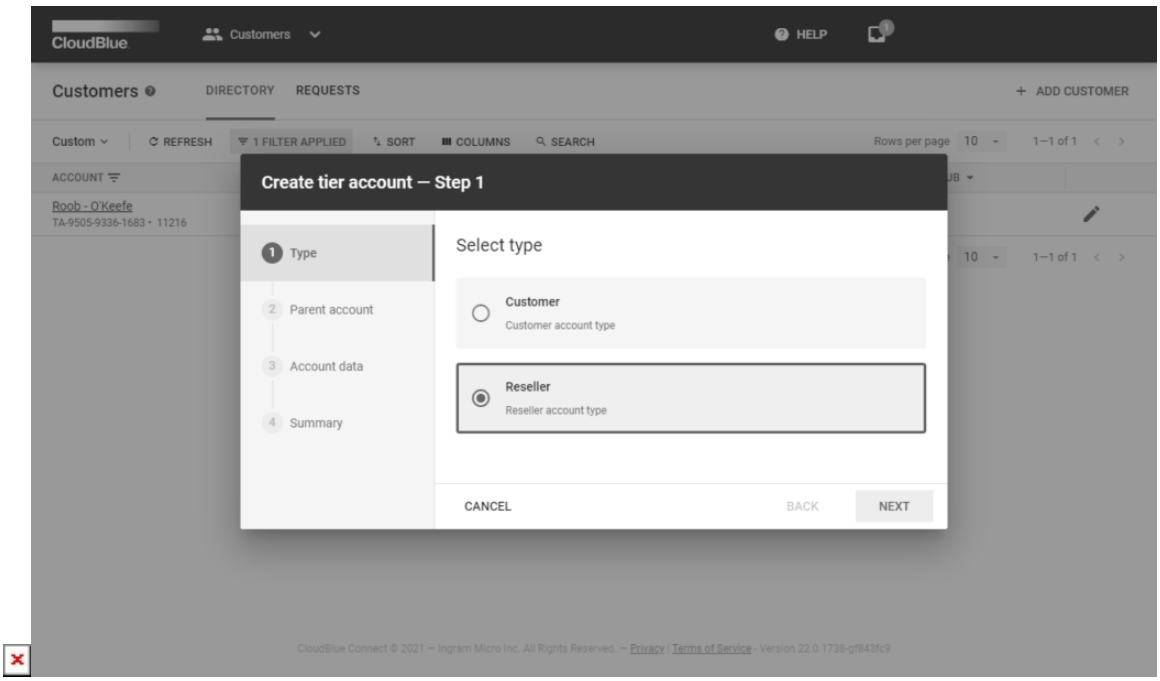
> ●
> Information
>
> Note that tier accounts can also be generated via an external system (e.g., CloudBlue Commerce).

Follow the wizard steps to successfully create a new customer or reseller account.

1. Type

Select a customer or reseller account type.

© Ingram Micro, Inc. All Rights Reserved.

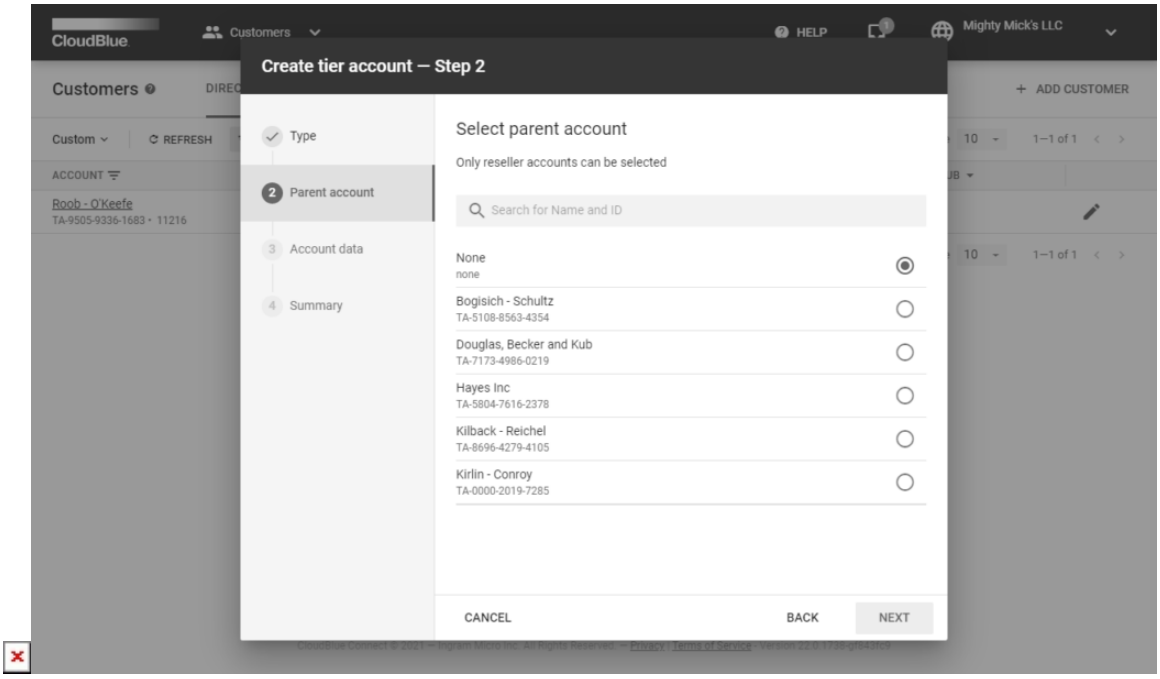


Click the **Next** button to continue.

2. Parent account

Specify a parent account for your new account. Note that only a reseller account can be selected as a parent account.

In case reseller account type is selected, you can select **None** to create a direct reseller.



Once a required option is selected, click the **Next** button to continue.

© Ingram Micro, Inc. All Rights Reserved.

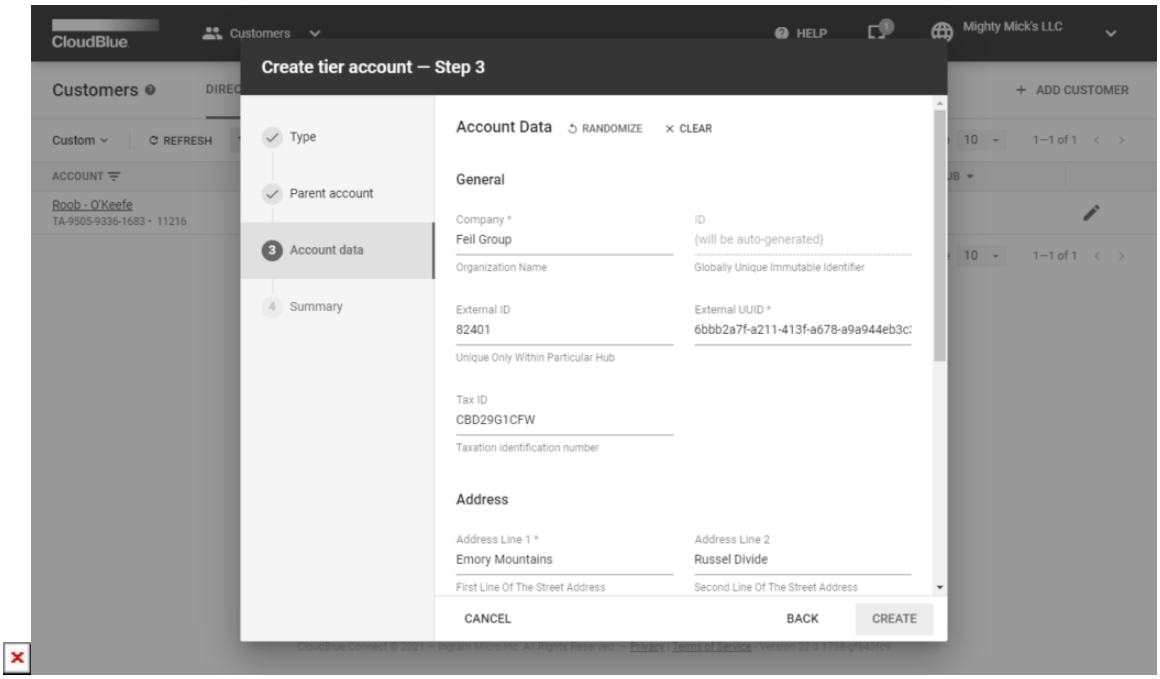
3. Account data

Fill out the following account data form:

- **General**: Specify general account information like an organization name, external UUID/ID, and tax ID. Note that GUI ID will be generated automatically.
- **Address**: Provide address information for your new account, such as a country, city, zip code and so on.
- **Technical Contact**: Specify a technical contact for your account. Provide your contact last and first names, an email and a phone number.

Note that you can also fill out all fields with random data by clicking the **Randomize** button.

Click the **Clear** button to clear out all provided fields.

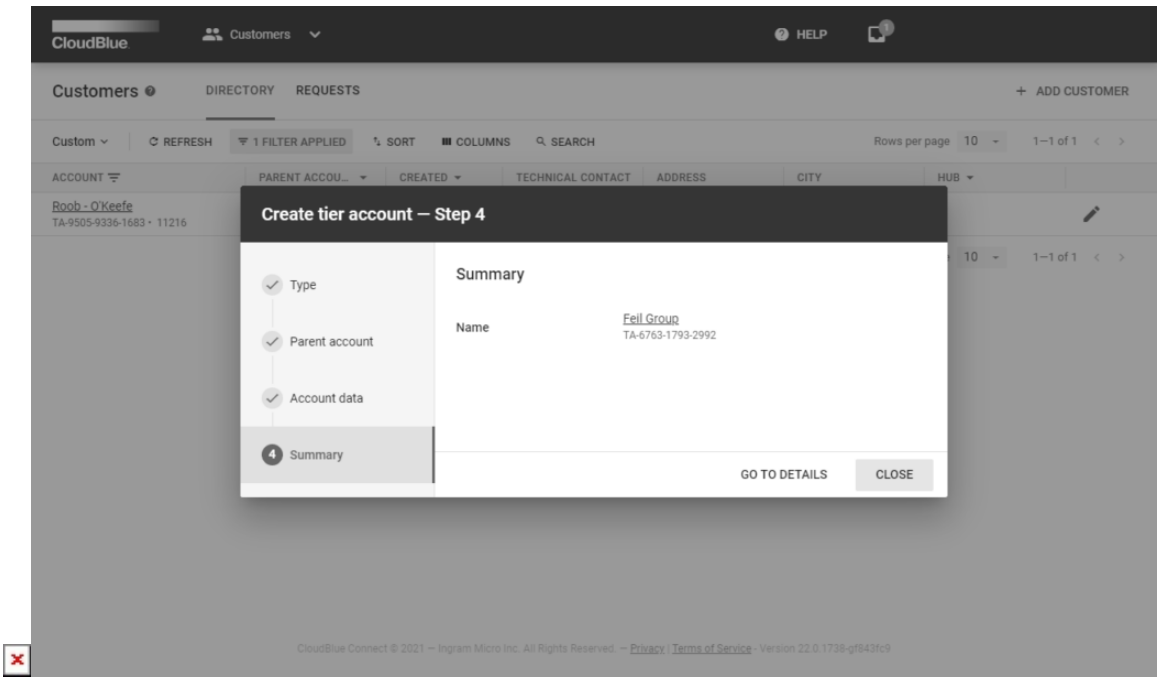


Click the **Create** button to finalize your tier account creation.

4. Summary

As a result, the system provides a summary once your tier account is successfully created.

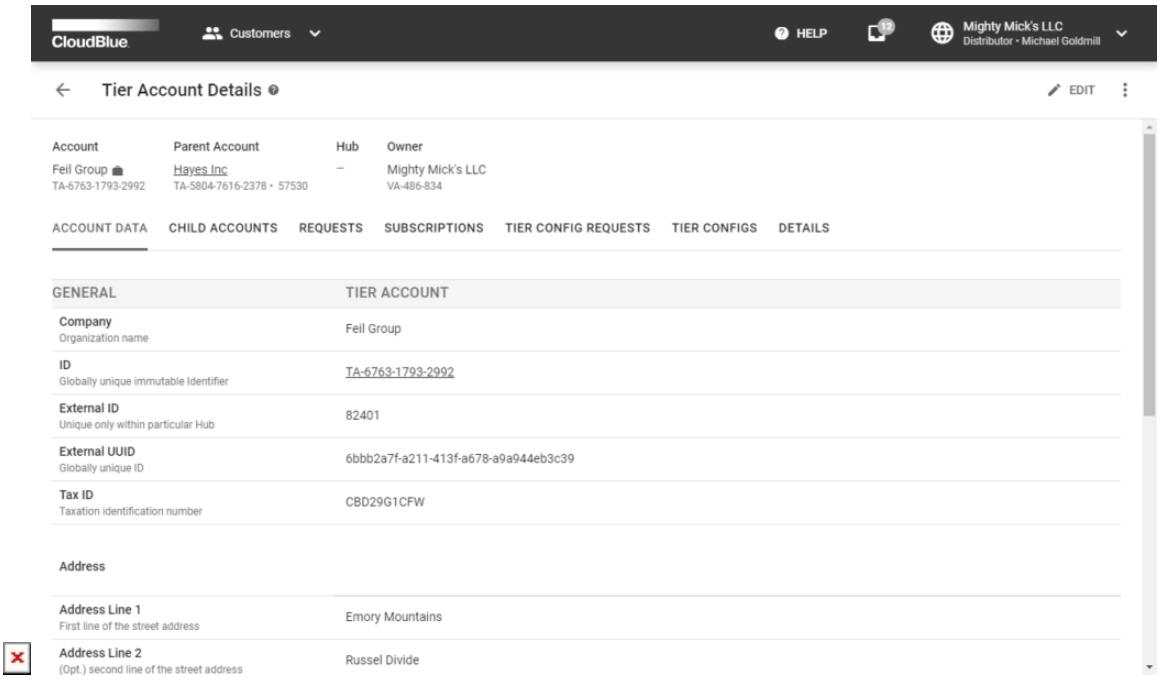
© Ingram Micro, Inc. All Rights Reserved.



Click **Go to Details** to access your created account details screen. Click the **Close** button to close the summary.

Tier Account Details

Click on a tier account name from the **Directory** tab to access the **Tier Account Details** screen.



Use the **Tier Account Details** screen to edit or delete your tier accounts. This screen also allows reviewing account, parent account, hub, and owner information.

© Ingram Micro, Inc. All Rights Reserved.

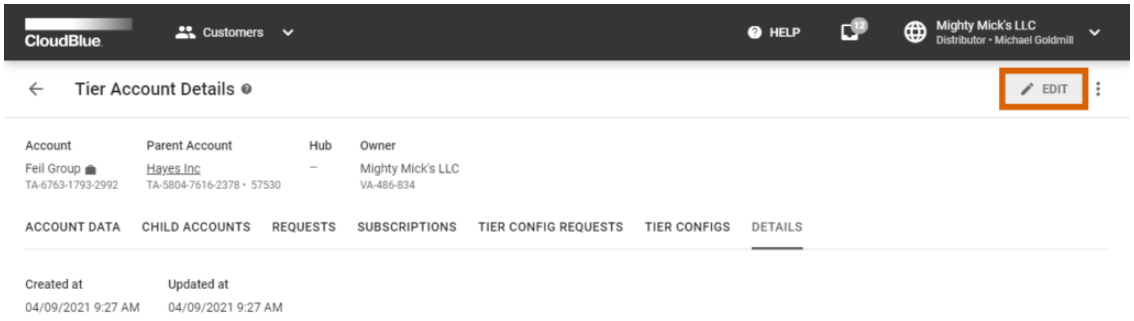
Furthermore, this screen provides various data within the following tabs:

- **Account Data**: This tab displays general account information, address data, and a technical contact.
- **Child Accounts**: Access child tier accounts of this account via this tab.
- **Requests**: View fulfillment requests that are associated with this tier account.
- **Subscriptions**: This tab provides interconnected subscriptions.
- **Tier Config Requests**: View associated tier configuration requests.
- **Tier Configs:** Access associated tier configurations via this tab.
- **Details**: This tab displays update and creation date of your tier account.

Editing Tier Accounts

Vendors and Providers can edit tier accounts to update specified account information. In case any account data is edited, the system generates a tier account request that can be approved or ignored by Vendors via **Tier Account Details** screen. Edit your tier account data by following the steps below.

1. Click the **Edit** button from the **Tier Account Details** screen to launch the Tier Account Update wizard.

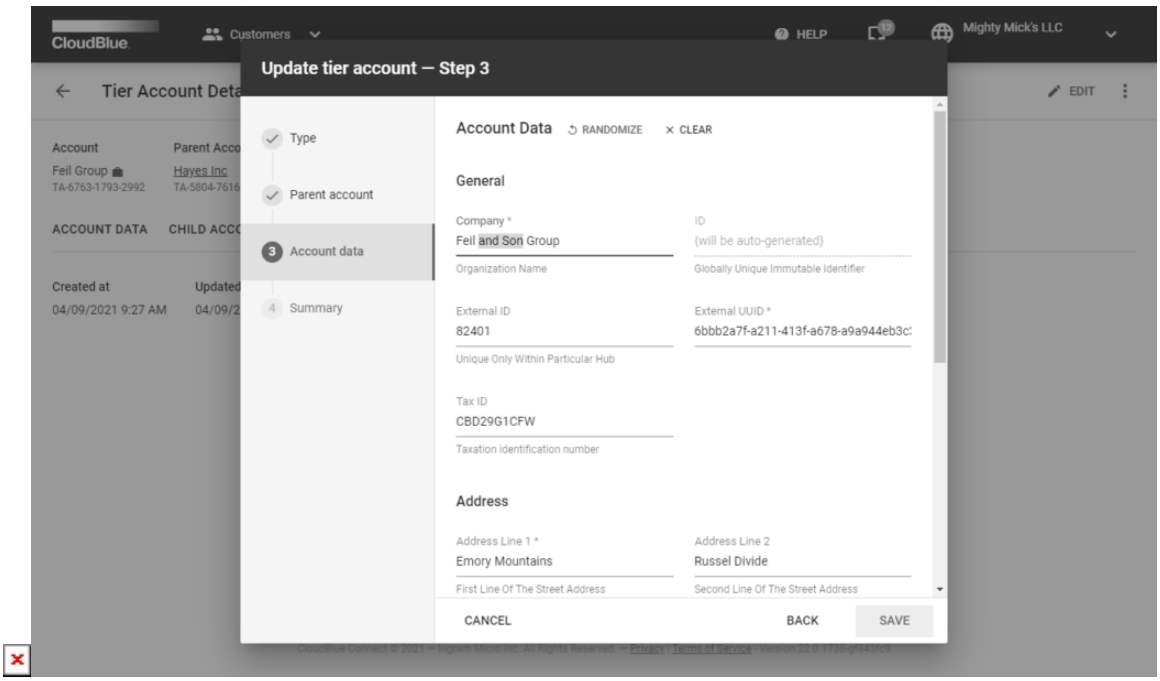


CloudBlue Connect © 2021 – Ingram Micro Inc. All Rights Reserved. – Privacy | Terms of Service - Version 22.0.1738-gf843fc9

2. Update your tier account information within the **Account data** form.

> **Note**
>
> It is possible to specify a parent account and change your tier account type by clicking **Back** and editing information within the provided wizard steps.

© Ingram Micro, Inc. All Rights Reserved.



Click the **Save** button to edit your tier account and generate a tier account request.

Note that this tier account is successfully updated once your tier account request is approved.

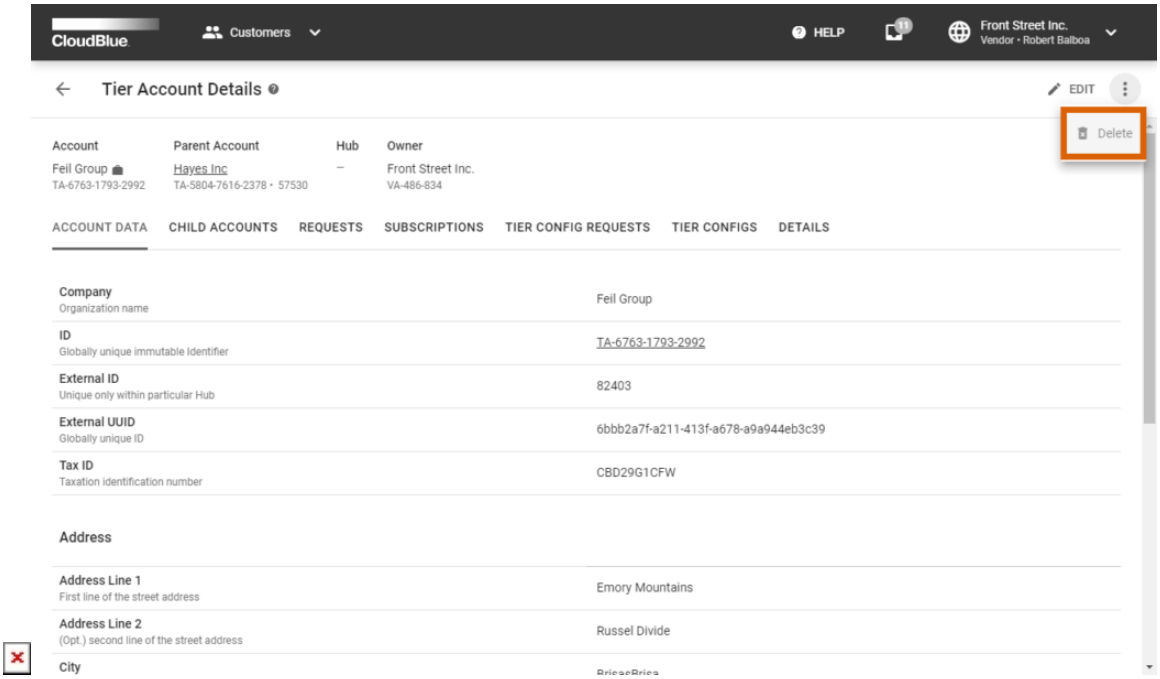
Deleting Tier Accounts

Vendors and Providers can remove a tier account by accessing the **Tier Account Details** screen. Note that deleted tier account data cannot be restored. The following steps showcase how to delete a tier account on the Connect platform.

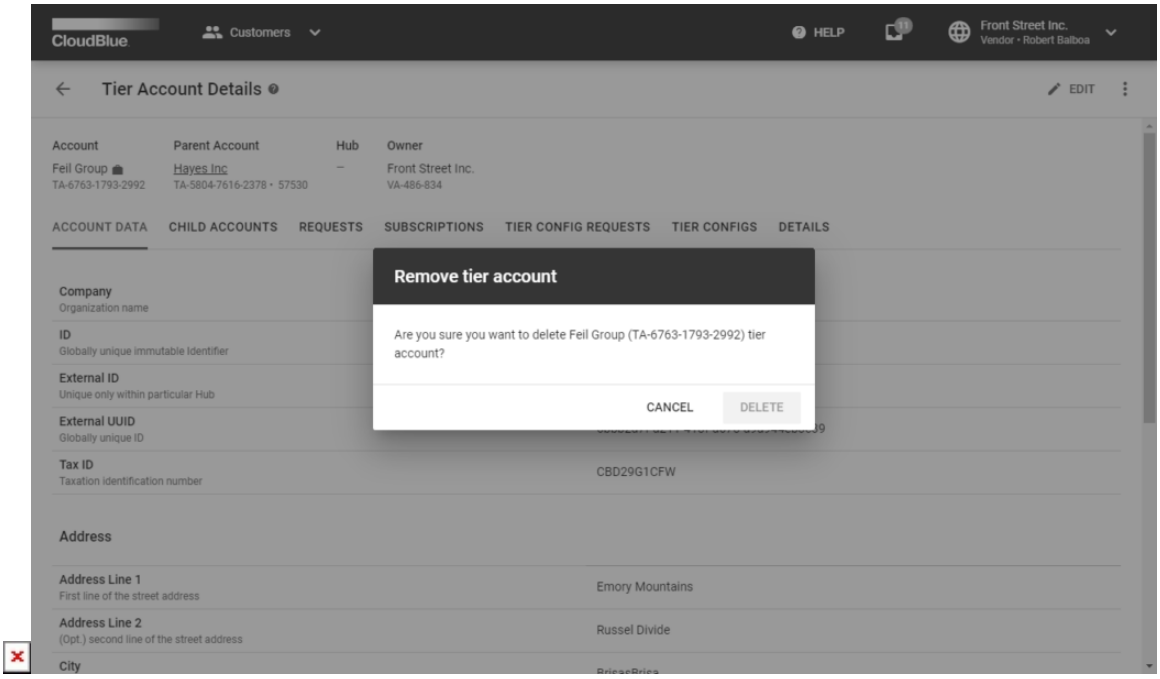
> ▲
> Removing Parent Accounts
>
> Note that parent tier accounts cannot be deleted on the Connect platform. In case it is necessary to remove a parent account, delete its child accounts first. Otherwise, the system displays a corresponding error after performing the following operations.

1. Open the vertical ellipsis (⋮) menu and click the **Delete** button.

© Ingram Micro, Inc. All Rights Reserved.



2. Confirm your decision by clicking **Delete** in the pop-up window.

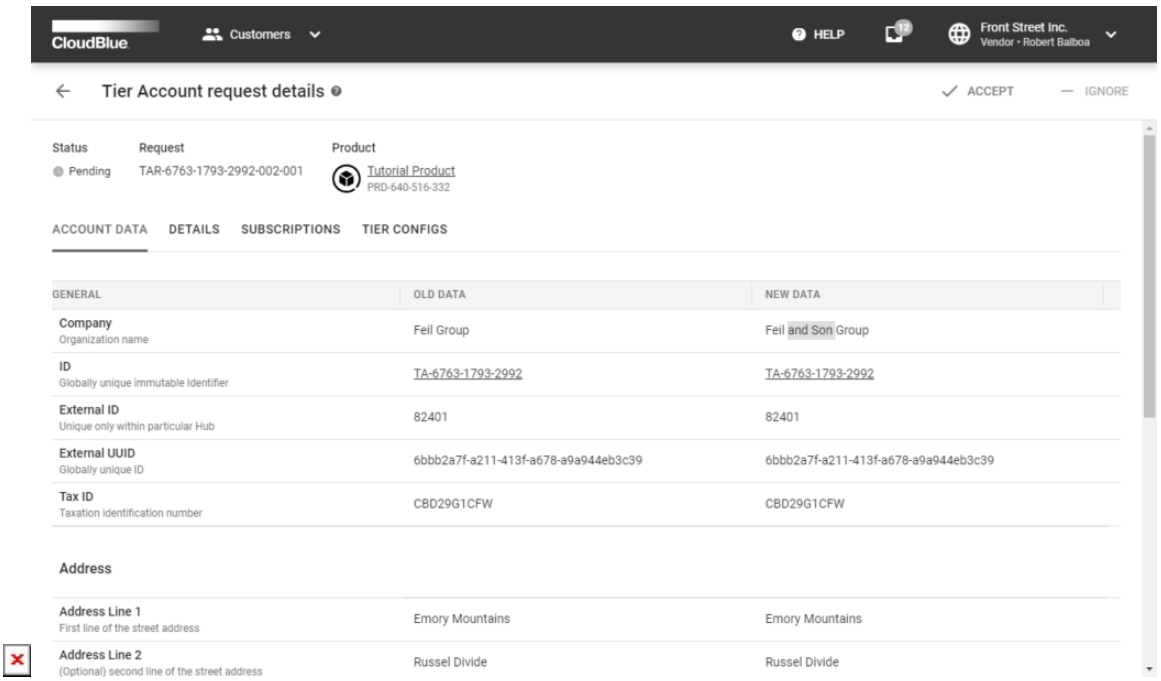


As a result, your tier account will be successfully removed.

Tier Account Request Details

Click on a tier account request ID from the **Requests** tab to access the request details screen.

© Ingram Micro, Inc. All Rights Reserved.



Use the **Account Data** tab from the **Tier Account Request Details** screen to review the required tier account changes and updates.

The **Details** tab displays an associated *Hub* and *external ID* of your request.

Access *subscriptions* that are interconnected with this tier account request via the **Subscriptions** tab.

Use the **Tier Configuration** tab to view and access associated *tier configurations*.

Furthermore, Vendors can accept required account changes or ignore them by accessing the **Tier Account Request Details** screen.

Accepting Requests

Once a request to change or update a tier account is created, Vendors can accept this request via **Tier Account Request Details**.

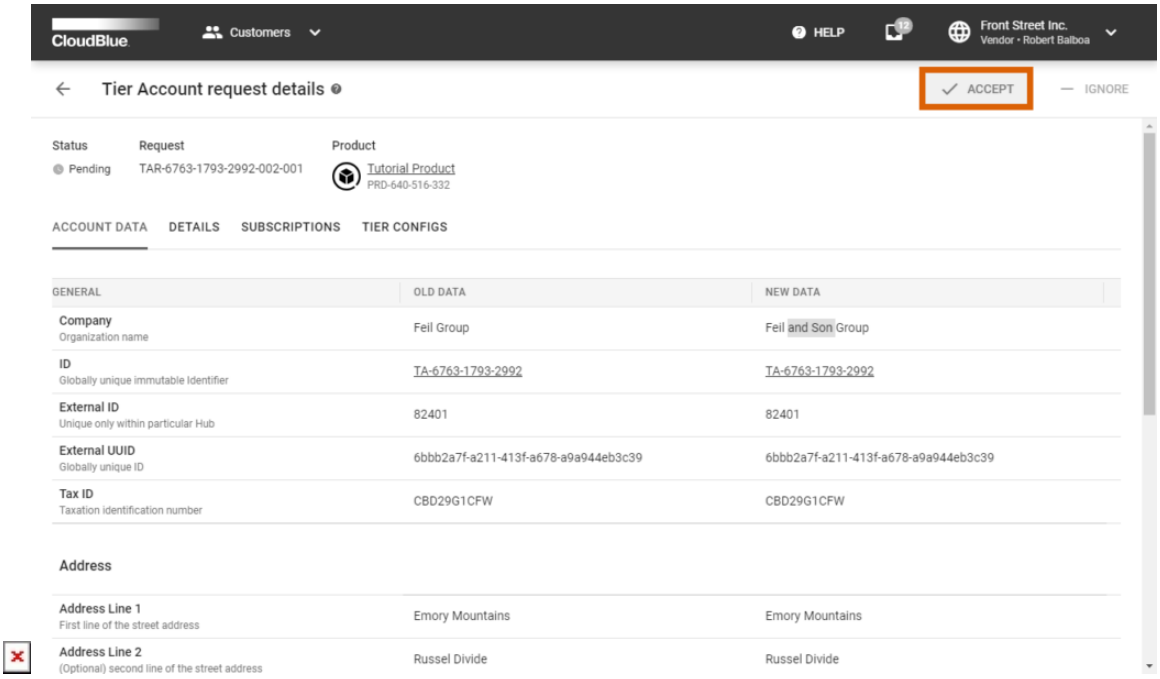
> ●
> Unsupported Requests
>
> In case the **Tier Accounts Sync** capability is disabled, your generated tier account request is assigned to the **Unsupported** state and automatically ignored by the system. Make sure to switch on this capability from the Capabilities tab within the **General** section

© Ingram Micro, Inc. All Rights Reserved.

> of your product profile page. Thus, Vendors will be able to accept tier account requests.

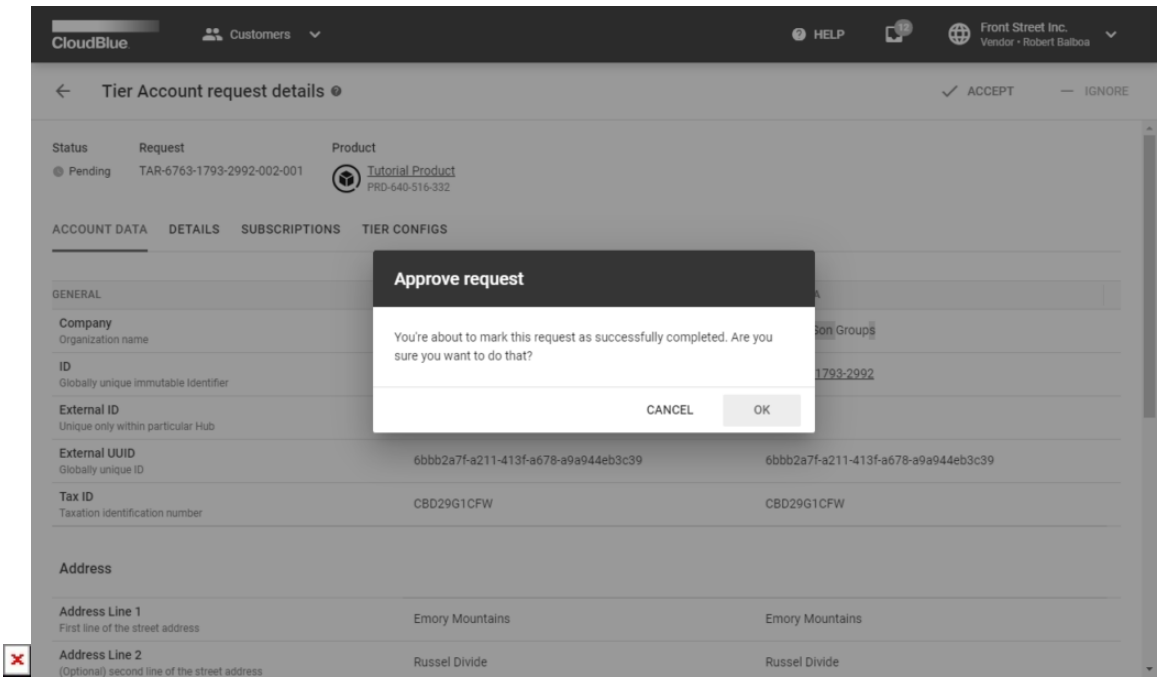
Follow the steps below to successfully accept a tier account request.

1. Click the **Accept** button from the **Tier Account Request Details** screen after reviewing required changes or updates.



2. Confirm your decision by clicking **OK** in the following pop-up window.

© Ingram Micro, Inc. All Rights Reserved.



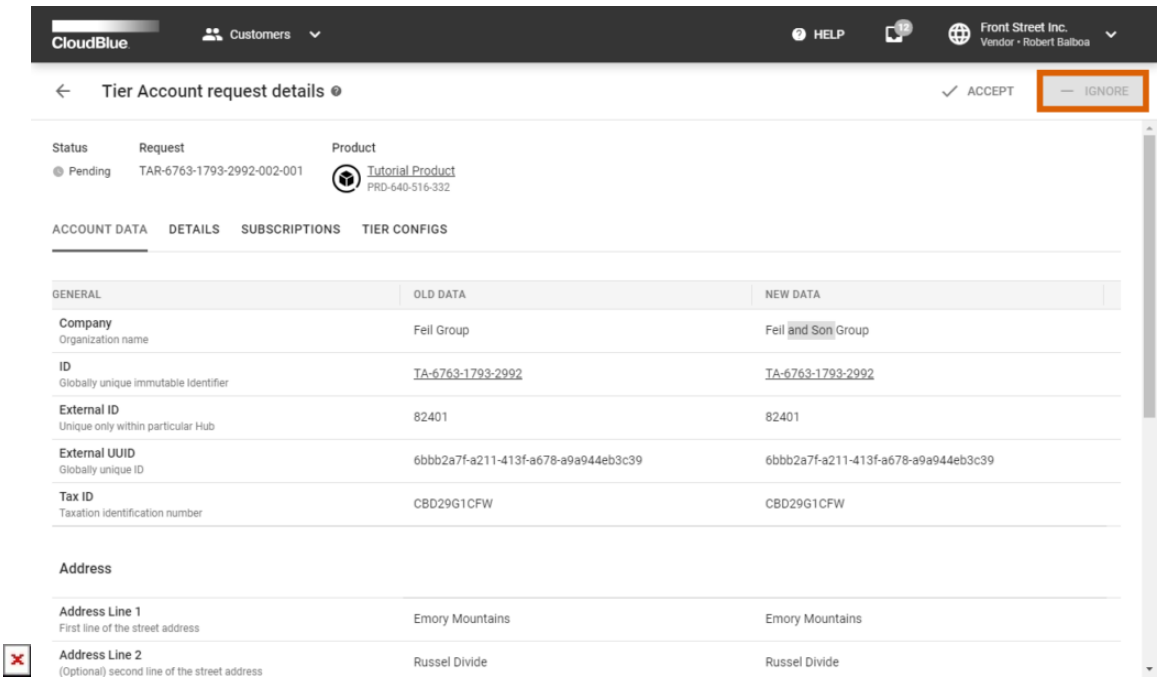
Therefore, this request will be accepted and its interconnected tier account will be successfully updated.

Ignoring Requests

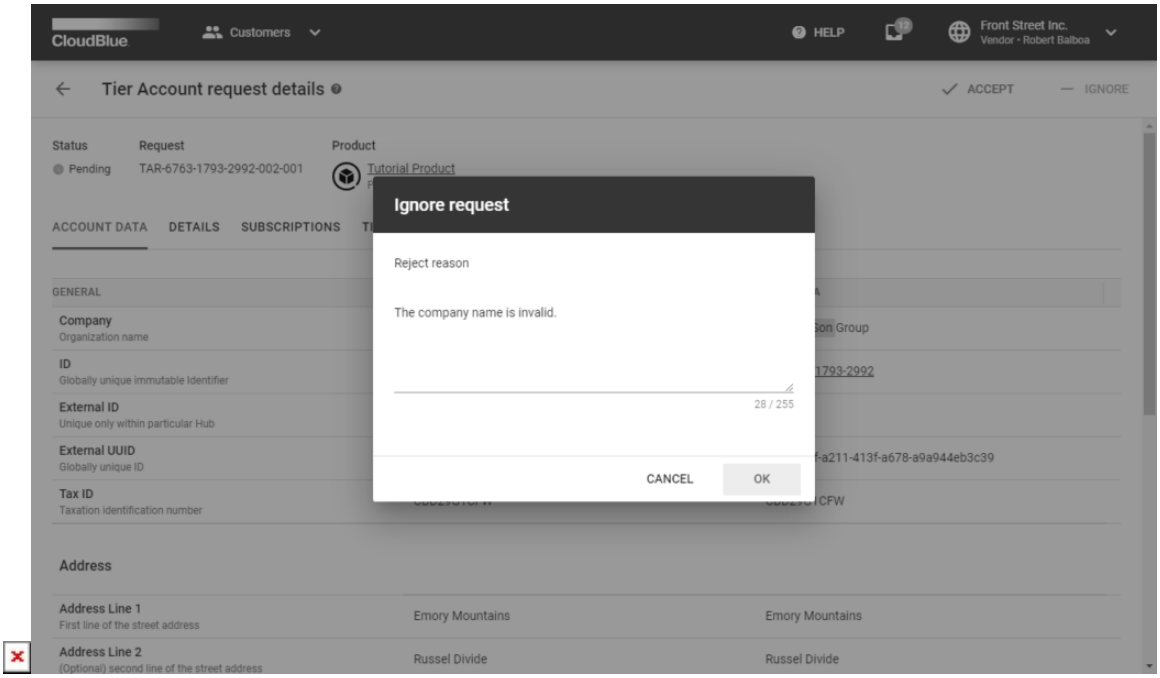
In case of an error, Vendors can assign the *Ignored* state to a tier account request. Note that ignoring updates and changes to a tier account will not revert or discard changes. However, ignoring these request can be especially useful to indicate errors and consolidate relevant tier account data. The following steps showcase how to ignore a tier account request.

1. Click the **Ignore** button from the **Tier Account Request Details** screen.

© Ingram Micro, Inc. All Rights Reserved.



2. Specify your reject reason within the following form.



Thereafter, click **OK** to submit your message.

As a result, your tier account request will be switched to the *Ignored* state.

© Ingram Micro, Inc. All Rights Reserved.