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Customers Interface



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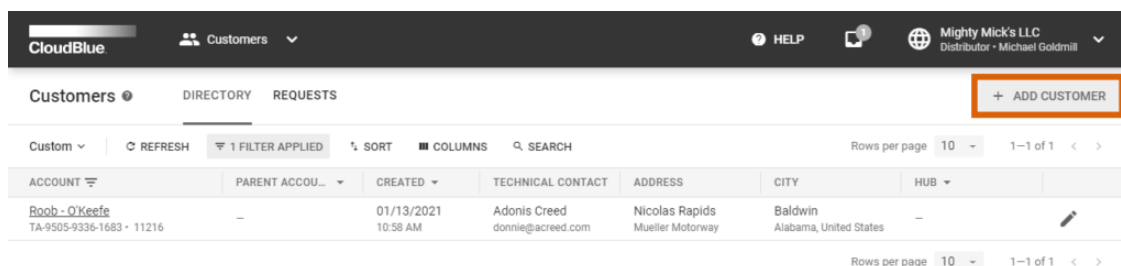
Auto-generated at April 4, 2026



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.



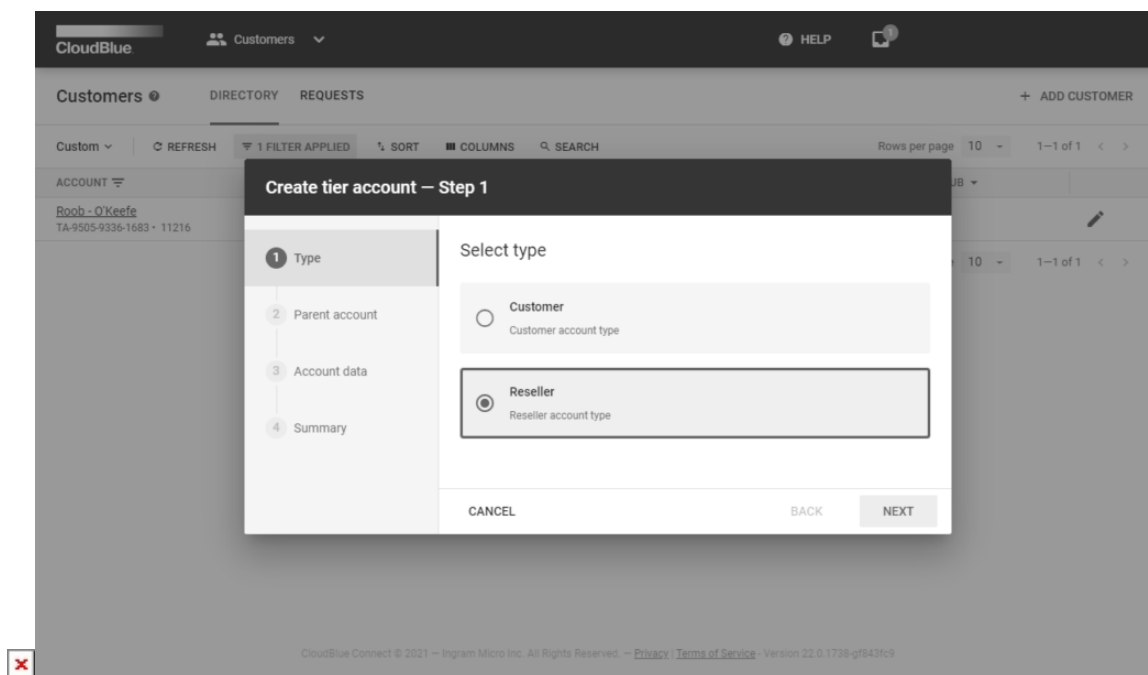
Information

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.

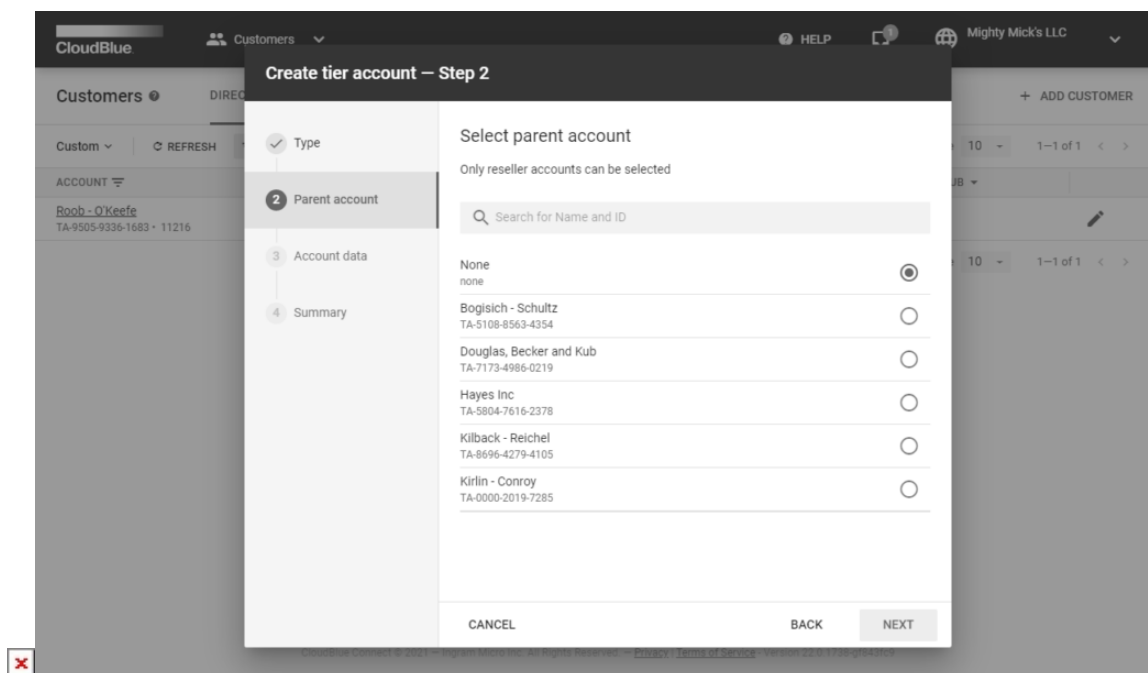


Click the **Next** button to continue.

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.



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.

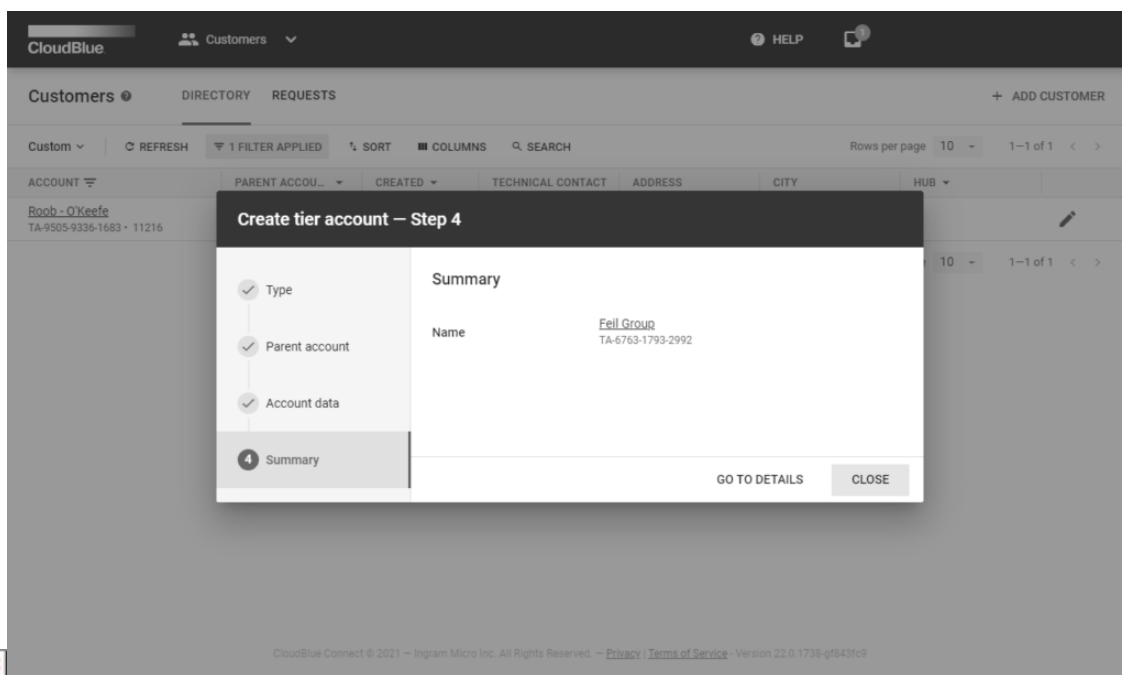
Click the **Clear** button to clear out all provided fields.

The screenshot shows the 'Create tier account - Step 3' form in the CloudBlue interface. The form is titled 'Create tier account - Step 3' and has a sidebar with steps: Type, Parent account, Account data (selected), and Summary. The main form area is divided into sections: General, Address, and Technical Contact. The General section includes fields for Company * (ID: (will be auto-generated)), Feil Group (Globally Unique Immutable Identifier), External ID (82401), External UUID * (6bbb2a7f-a211-413f-a678-a9a944eb3c), Unique Only Within Particular Hub, Tax ID (CBD29G1CFW), and Taxation Identification number. The Address section includes Address Line 1 * (Emory Mountains), Address Line 2 (Russel Divide), First Line Of The Street Address, and Second Line Of The Street Address. At the bottom, there are buttons for CANCEL, BACK, and CREATE.

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

4. Summary

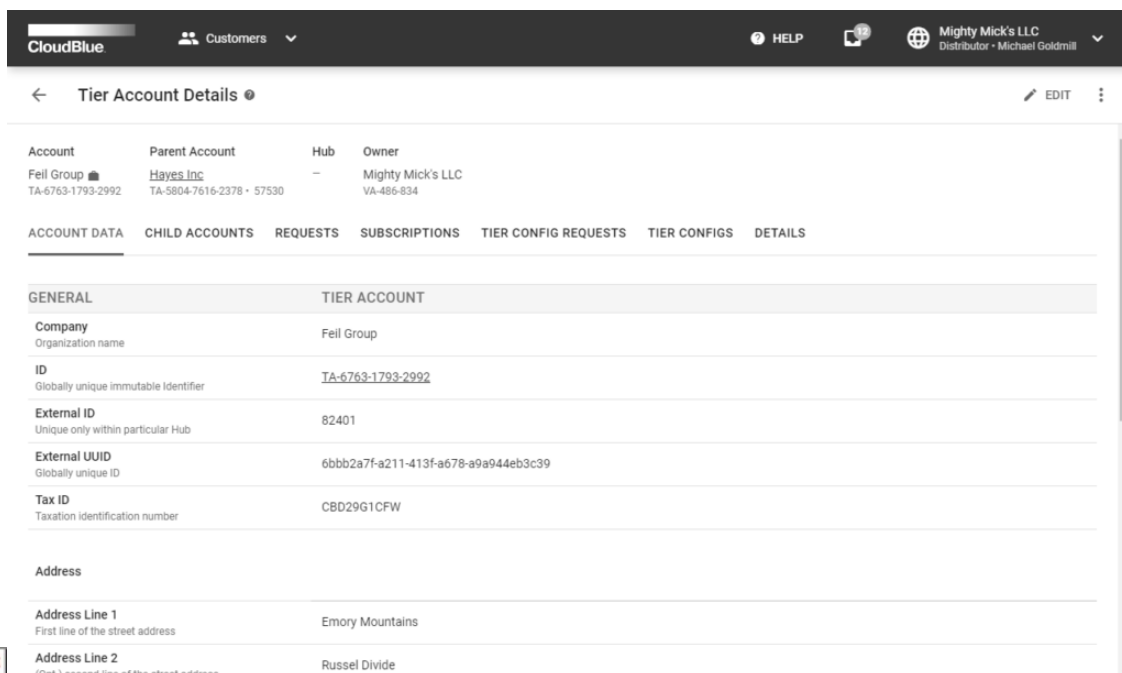
As a result, the system provides a summary once your tier account is successfully created.



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.



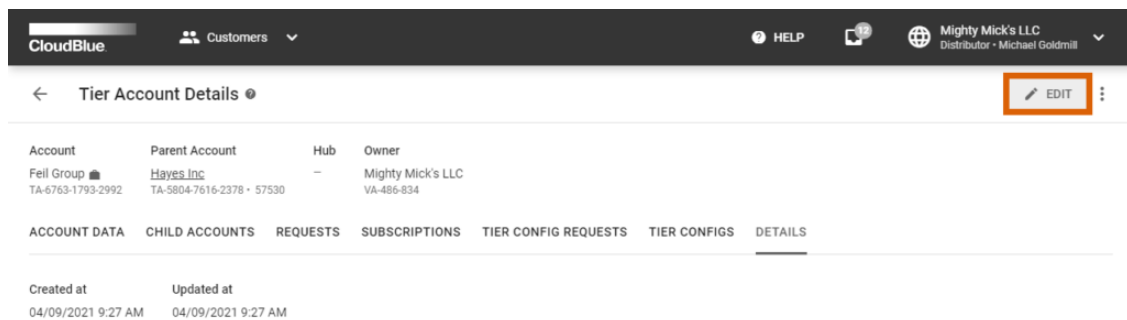
Furthermore, this screen provides various data within the following tabs:

- **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.



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.



The screenshot shows the 'Update tier account - Step 3' form in the CloudBlue interface. The form is titled 'Update tier account - Step 3' and is divided into four sections: Type, Parent account, Account data, and Summary. The 'Account data' section is currently active and contains the following fields:

- General**
 - Company *: Feil and Soni Group
 - ID: (will be auto-generated)
 - Organization Name: Globally Unique Immutable Identifier
 - External ID: 82401
 - External UUID *: 6bbb2a7f-a211-413f-a678-a9a944eb3c
 - Tax ID: CBD29G1CFW
 - Taxation identification number: (empty)
- Address**
 - Address Line 1 *: Emory Mountains
 - Address Line 2: Russel Divide
 - First Line Of The Street Address: (empty)
 - Second Line Of The Street Address: (empty)

At the bottom of the form, there are three buttons: CANCEL, BACK, and SAVE.

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

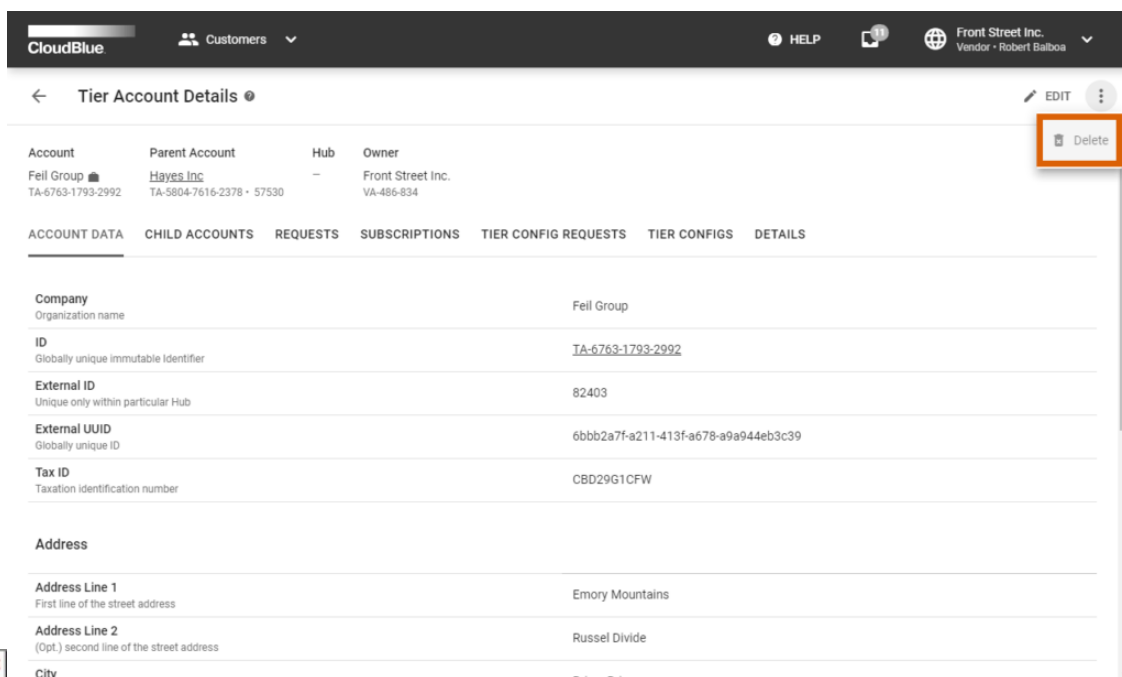
Vendors and Providers can remove a tier account by accessing the **Tier Account Details** screen. Note that deleted tier account data cannot be restored. The following steps showcase how to delete a tier account on the Connect platform.



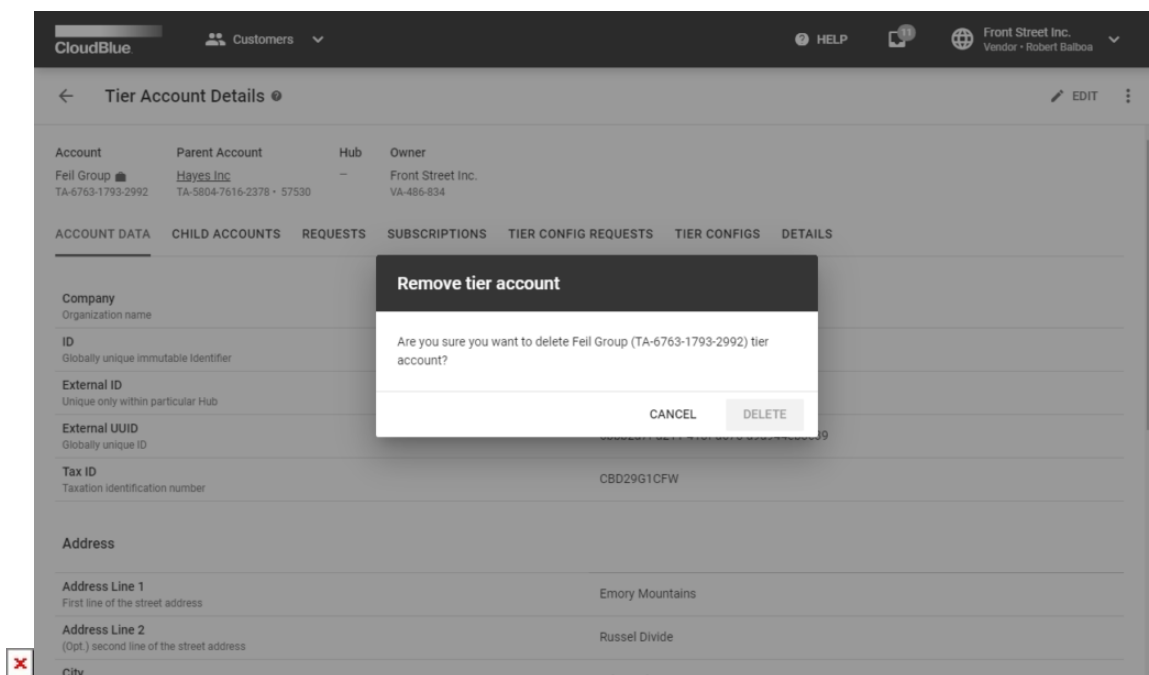
Removing Parent Accounts

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.



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.



Tier Account request details ACCEPT IGNORE

Status: Pending | Request: TAR-6763-1793-2992-002-001 | Product: Tutorial Product (PRD-640-516-332)

ACCOUNT DATA | DETAILS | SUBSCRIPTIONS | TIER CONFIGS

GENERAL	OLD DATA	NEW DATA
Company Organization name	Feil Group	Feil and Son Group
ID Globally unique immutable Identifier	TA-6763-1793-2992	TA-6763-1793-2992
External ID Unique only within particular Hub	82401	82401
External UUID Globally unique ID	6bbb2a7f-a211-413f-a678-a9a944eb3c39	6bbb2a7f-a211-413f-a678-a9a944eb3c39
Tax ID Taxation identification number	CBD29G1CFW	CBD29G1CFW

Address

Address Line 1 First line of the street address	Emory Mountains	Emory Mountains
Address Line 2 (Optional) second line of the street address	Russel Divide	Russel Divide

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



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

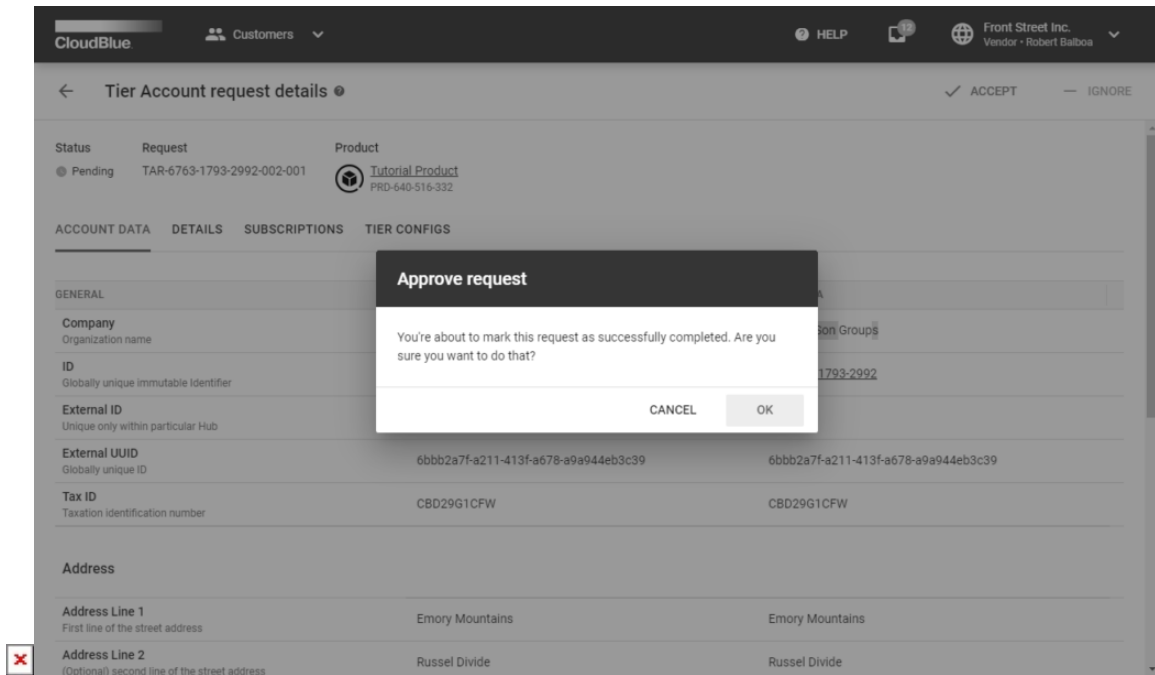
Follow the steps below to successfully accept a tier account request.

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

The screenshot shows the 'Tier Account request details' screen in the CloudBlue interface. At the top, there is a navigation bar with 'CloudBlue', 'Customers', 'HELP', and 'Front Street Inc. Vendor - Robert Balboa'. Below the navigation bar, the title 'Tier Account request details' is displayed, along with a back arrow and two buttons: 'ACCEPT' (highlighted with an orange box) and 'IGNORE'. The main content area shows the request status as 'Pending' and the request ID as 'TAR-6763-1793-2992-002-001'. The product is identified as 'Tutorial Product' with ID 'PRD-640-516-332'. Below this, there are tabs for 'ACCOUNT DATA', 'DETAILS', 'SUBSCRIPTIONS', and 'TIER CONFIGS'. The 'DETAILS' tab is active, showing a table with columns for 'GENERAL', 'OLD DATA', and 'NEW DATA'. The table lists various fields such as 'Company', 'ID', 'External ID', 'External UUID', 'Tax ID', 'Address Line 1', and 'Address Line 2', with their respective old and new values. A small red 'X' icon is visible in the bottom left corner of the screenshot.

GENERAL	OLD DATA	NEW DATA
Company Organization name	Feil Group	Feil and Son Group
ID Globally unique immutable Identifier	TA-6763-1793-2992	TA-6763-1793-2992
External ID Unique only within particular Hub	82401	82401
External UUID Globally unique ID	6bbb2a7f-a211-413f-a678-a9a944eb3c39	6bbb2a7f-a211-413f-a678-a9a944eb3c39
Tax ID Taxation identification number	CBD29G1CFW	CBD29G1CFW
Address		
Address Line 1 First line of the street address	Emory Mountains	Emory Mountains
Address Line 2 (Optional) second line of the street address	Russel Divide	Russel Divide

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



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.



GENERAL	OLD DATA	NEW DATA
Company Organization name	Feil Group	Feil and Son Group
ID Globally unique immutable Identifier	TA-6763-1793-2992	TA-6763-1793-2992
External ID Unique only within particular Hub	82401	82401
External UUID Globally unique ID	6bbb2a7f-a211-413f-a678-a9a944eb3c39	6bbb2a7f-a211-413f-a678-a9a944eb3c39
Tax ID Taxation identification number	CBD29G1CFW	CBD29G1CFW
Address		
Address Line 1 First line of the street address	Emory Mountains	Emory Mountains
Address Line 2 (Optional) second line of the street address	Russel Divide	Russel Divide

2. Specify your reject reason within the following form.

Ignore request

Reject reason

The company name is invalid.

CANCEL OK

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

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