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Customers Interface



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Auto-generated at November 21, 2024



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.

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Customers

HELP

Mighty Mick's LLC

Distributor • Michael Goldmill

Customers

DIRECTORY

REQUESTS

+ ADD CUSTOMER

Custom

REFRESH

1 FILTER APPLIED

SORT

COLUMNS

SEARCH

Rows per page 10

1-1 of 1

ACCOUNT	PARENT ACCOU...	CREATED	TECHNICAL CONTACT	ADDRESS	CITY	HUB
<div>Roob - O'Keefe</div> <div>TA-9505-9336-1683 • 11216</div>	—	<div>01/13/2021</div> <div>10:58 AM</div>	<div>Adonis Creed</div> <div>donnie@acreed.com</div>	<div>Nicolas Rapids</div> <div>Mueller Motorway</div>	<div>Baldwin</div> <div>Alabama, United States</div>	—

Rows per page 10

1-1 of 1



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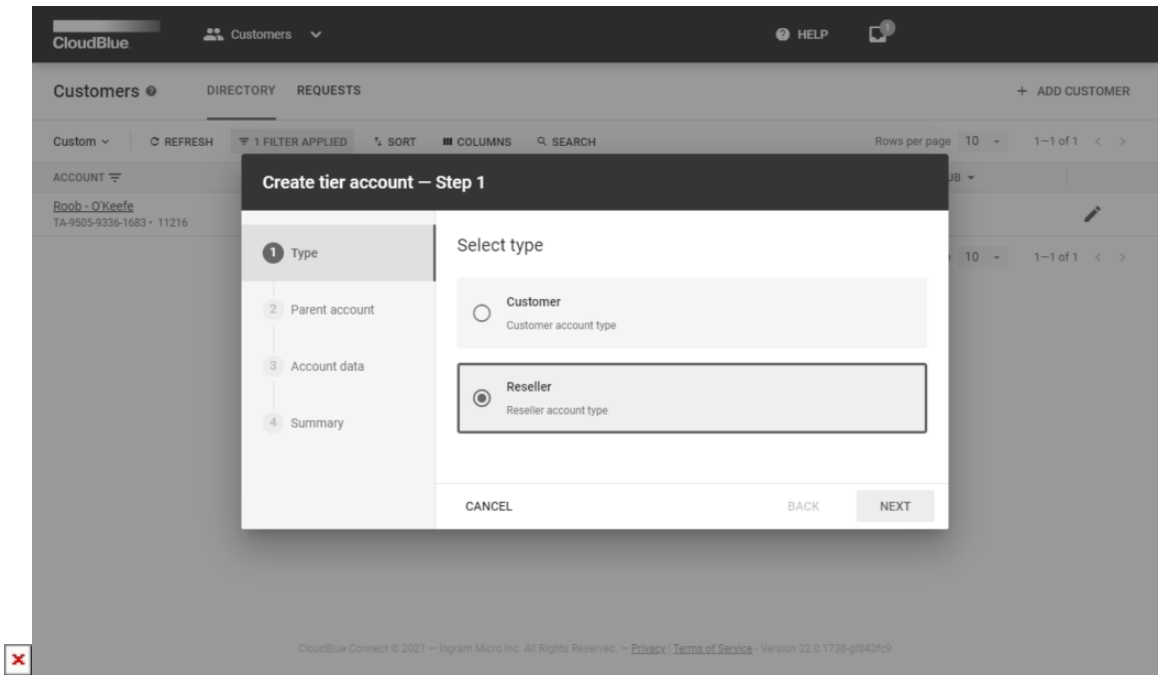
Information

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.

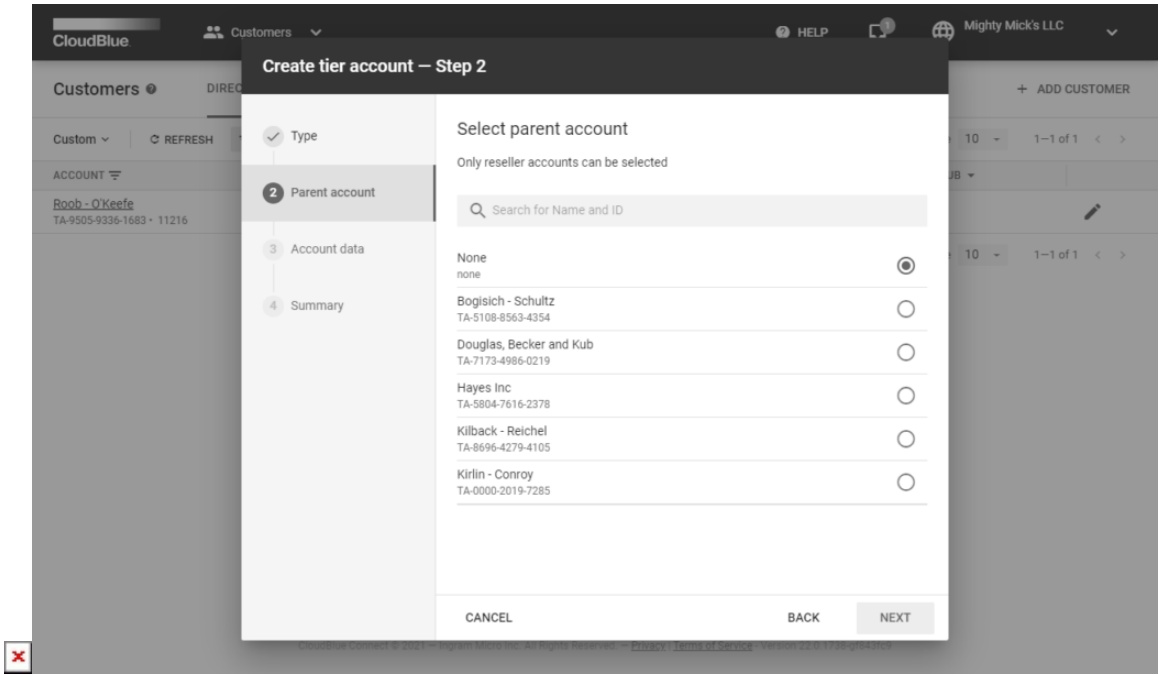


Click the **Next** button to continue.

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.

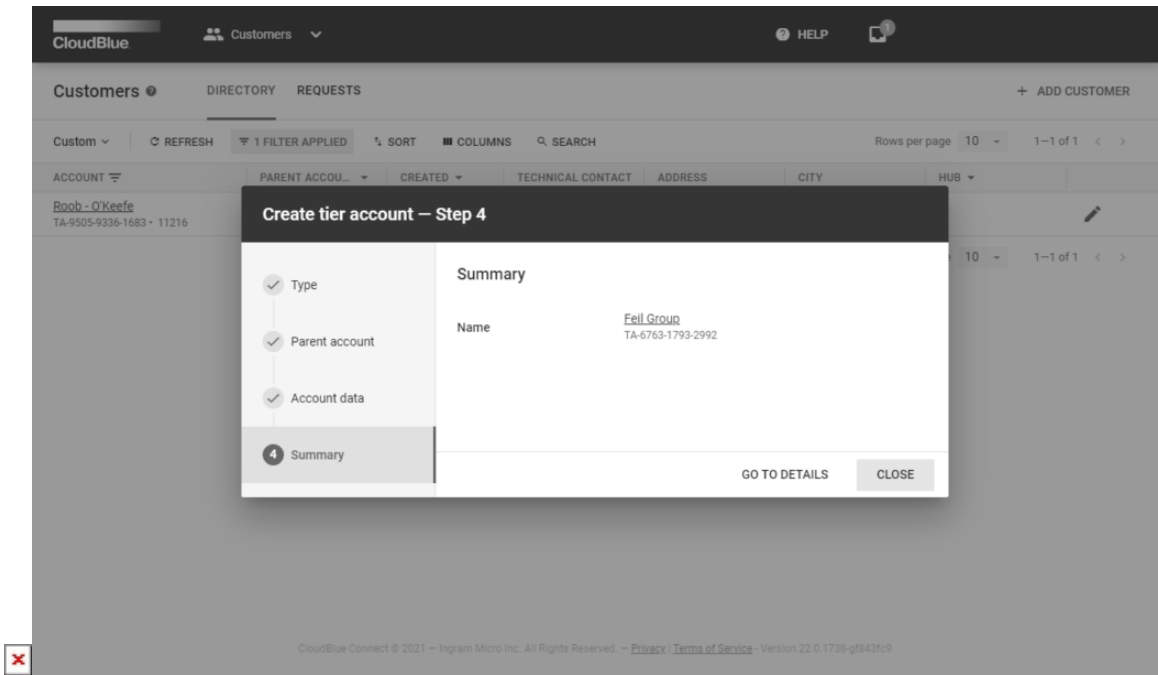
Note that you can also fill out all fields with random data by clicking the **Randomize** button.

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

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

4. Summary

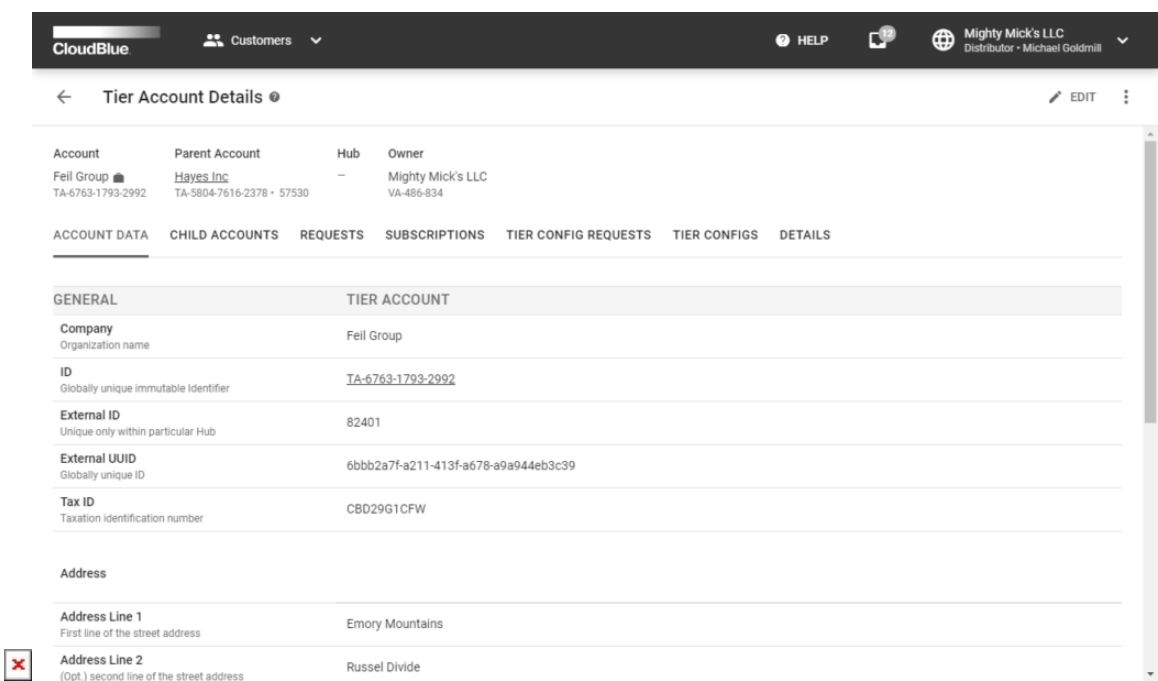
As a result, the system provides a summary once your tier account is successfully created.



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.



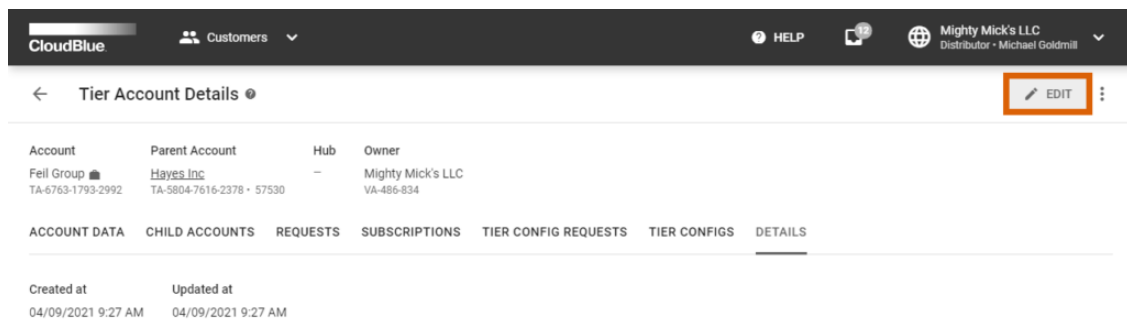
Furthermore, this screen provides various data within the following tabs:

- **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.



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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.



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

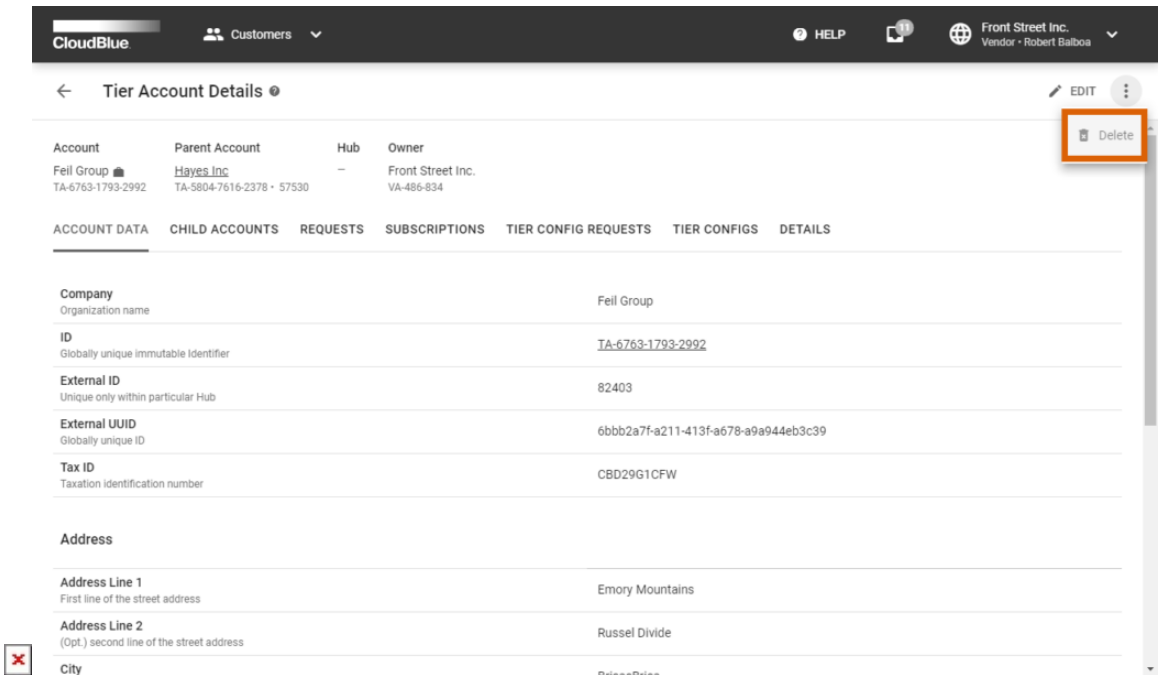
Vendors and Providers can remove a tier account by accessing the **Tier Account Details** screen. Note that deleted tier account data cannot be restored. The following steps showcase how to delete a tier account on the Connect platform.



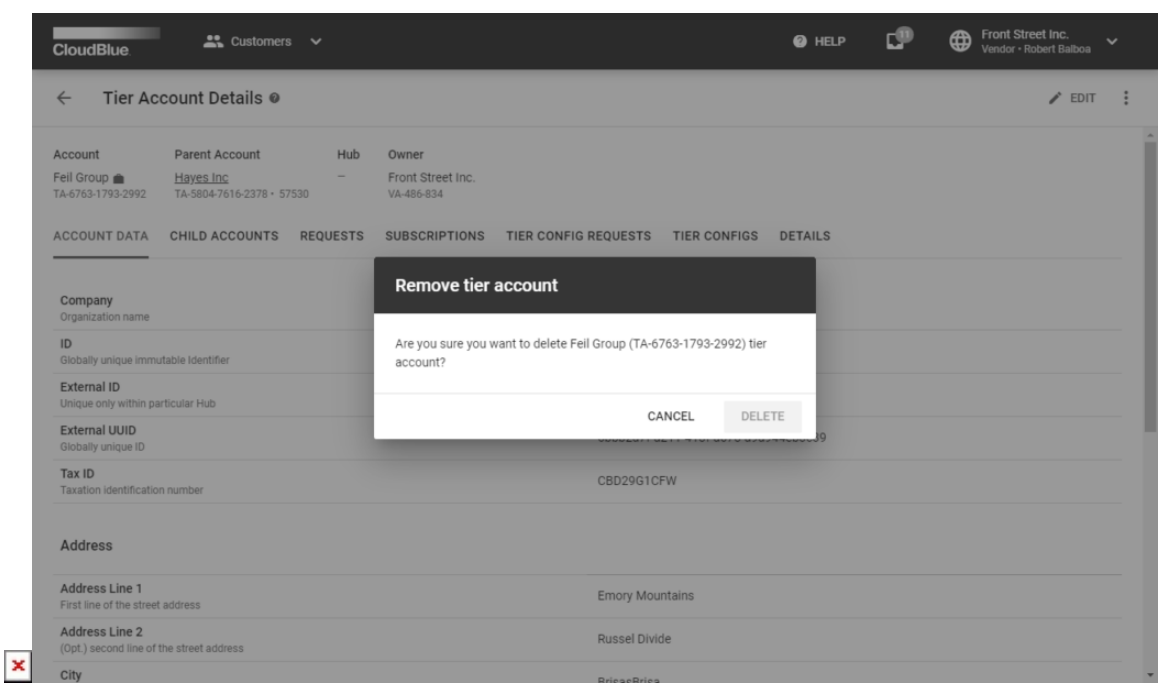
Removing Parent Accounts

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.



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HELP

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Front Street Inc.
Vendor - Robert Balboa

Tier Account request details

ACCEPT

IGNORE

Status

Request

Product

Pending

TAR-6763-1793-2992-002-001

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

TAR-6763-1793-2992

TAR-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.

CloudBlue Customers HELP Front Street Inc. Vendor - Robert Balboa

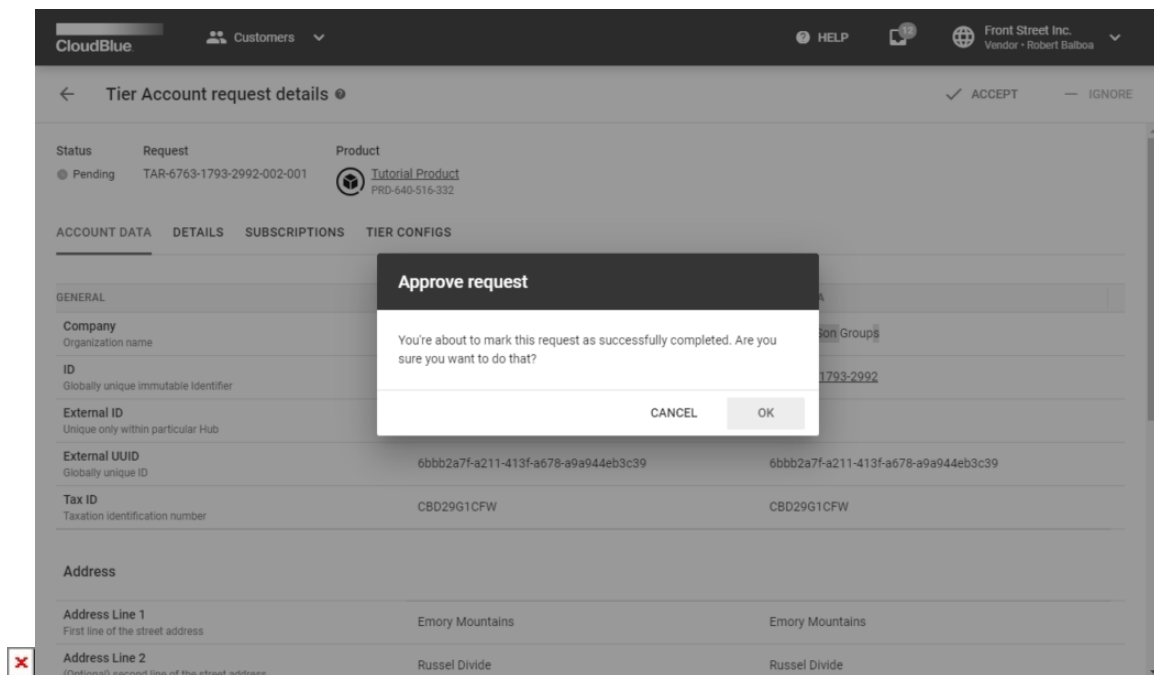
← Tier Account request details ACCEPT IGNORE

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

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.



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Front Street Inc.
Vendor - Robert Balboa

← Tier Account request details

✓ ACCEPT

— IGNORE

Status

Request

Product

● Pending

TAR-6763-1793-2992-002-001

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

TAR-6763-1793-2992

TAR-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

CB029G1CFW

CB029G1CFW

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.

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Front Street Inc.
Vendor - Robert Balboa

← Tier Account request details

✓ ACCEPT

— IGNORE

Status

Request

Product

● Pending

TAR-6763-1793-2992-002-001

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

TAR-6763-1793-2992

TAR-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

CB029G1CFW

CB029G1CFW

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

Ignore request

Reject reason

The company name is invalid.

28 / 255

CANCEL

OK

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

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