

Quick Start Tutorial

Introduction

This page is intended to guide new operators through the steps required to onboard tenants.

Step 1: Add a Region

Note: Only Platform Administrators can onboard regions.

- From the **Dashboard** or under **Settings** and **Regions**.
- Select **Add Region** and complete the wizard to onboard a region

Step 2: Add a Distributor

Note: Only Platform Administrators can onboard distributors.

- Under **Relationships** select **Distributors**.
- Select **Add Distributor** and complete the wizard to onboard a distributor.

Step 3: Add a Partner

Note: Only Platform and Distributor Administrators can onboard partners.

- Under **Relationships** select **Partners**.
- Select **Add Partner** and complete the wizard to onboard a partner.

Step 4: Add a Tenant

Note: Only Platform, Distributor and Partner Administrators can onboard tenants.

- From the **Dashboard** or under **Relationships** and **Tenants**.
- Select **Add Tenant** and complete the wizard to onboard a tenant.

Step 5: Create a Subscription

Note: Any Administrator role can onboard a new subscription.

- From the **Dashboard** or under **Subscriptions**.
- Select **Add Subscription** and complete the wizard to onboard a new subscription.

Step 6: Configure Users

Note: Create and scope users accordingly noting that at each level of the model (Distributors, Partners and Tenants) can manage their respective scoped users.

- From the **Dashboard** or under **Settings** and **Users**.
- Select **Add User** and complete the wizard to onboard a new user.

Step 7: Configure Pricing

- Under **Pricing**.
- While in the Meters or SKUs view.
- Select **Add Pricing**. Configure the price lists as required.

Step 8: Generate Billing Records

- Under **Settings**. Select **Regions**.
- Select **Update Usage**.
- Under **Billing**. Ensure the billing records have been created as required.

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