

Relationship Management

Introduction

Relationship management is a critical part of administering the system.

CloudAxis

Relationships

TENANTS PARTNERS DISTRIBUTORS

Total Tenants: 5

REFRESH + CREATE TENANT PERFORMANCE Search

Partner	Tenant	Current Consumption (USD)	Custom Pricing	Discount Applies	Outstanding Invoices
InnoTech	City Council	896.81	No	No	Yes
Cloud Axis	Cloud Axis	0.00	No	No	No
InnoTech	Petes Distributors	195.97	No	No	No
Lamda Solutions	Petstop	0.00	No	No	No
InnoTech	Preston Law	195.97	No	No	Yes

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Add a Distributor

Purpose

Register a new distributor as the top-level commercial entity under the platform.

Permission Level

Platform Administrator

Steps

1. Go to Relationships→ Distributors.
2. Select **Create**.
3. Enter Distributor Name and details.
4. Assign a Distributor Administrator user.
5. Select **Save**.

Edit a Distributor

Purpose

Update distributor details or administrators.

Permission Level

Platform Administrator

Steps

1. Go to Relationships → Distributors.
 2. Select the distributor you want to edit.
 3. Update Name, contact information, or administrator assignments.
 4. Select **Save**.
-

Delete a Distributor

Purpose

Remove a distributor permanently.

Permission Level

Platform Administrator

Steps

1. Go to Relationships → Distributors.
 2. Select the distributor you want to delete.
 3. Select **Delete**.
 4. Confirm deletion.
-

Add a Partner

Purpose

Register a new partner under a distributor.

Permission Level

Distributor Administrator

Platform Administrator

Steps

1. Go to Relationships → Partners.
 2. Select **Create**.
 3. Enter Partner Name and details.
 4. Assign Partner Administrator(s).
 5. Select the Distributor this partner belongs to.
 6. Select **Save**.
-

Edit a Partner

Purpose

Update partner details or administrator assignments.

Permission Level

Distributor Administrator

Platform Administrator

Steps

1. Go to Relationships → Partners.
 2. Select the partner you want to edit.
 3. Update details or administrators.
 4. Select **Save**.
-

Delete a Partner

Purpose

Remove a partner permanently.

Permission Level

Distributor Administrator

Platform Administrator

Steps

1. Go to Relationships → Partners.
 2. Select the partner you want to delete.
 3. Select **Delete**.
 4. Confirm deletion.
-

Add a Tenant

Purpose

Onboard a consuming organization under a partner.

Permission Level

Partner Administrator

Distributor Administrator

Platform Administrator

Steps

1. Go to Relationships → Tenants.
2. Select **Create**.

3. Enter Tenant Name and details.
 4. Assign Tenant Administrator(s).
 5. Select the Partner this tenant belongs to.
 6. Select **Save**.
-

Edit a Tenant

Purpose

Update tenant details or administrators.

Permission Level

Partner Administrator

Distributor Administrator

Platform Administrator

Steps

1. Go to Relationships → Tenants.
 2. Select the tenant you want to edit.
 3. Update details or administrators.
 4. Select **Save**.
-

Delete a Tenant

Purpose

Remove a tenant permanently.

Permission Level

Partner Administrator

Distributor Administrator

Platform Administrator

Steps

1. Go to Relationships → Tenants.
 2. Select the tenant you want to delete.
 3. Select **Delete**.
 4. Confirm deletion.
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