

# CMS v2 Usage Manual

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## Overview

CMS v2 is the CloudAxis portal for managing cloud customers, platform regions, subscriptions, catalogue pricing, usage, billing, invoices, alerts, jobs, settings, and updates.

This manual is for administrators, operators, support teams, and users who need to understand what the portal does and how to use it.

## Purpose

Use CMS to:

- Manage distributors, partners, tenants, users, and subscriptions.
- Configure Azure Stack, Azure Local, Public Azure, and CloudStack regions.
- Maintain catalogue and pricing data.
- Collect usage and review billing.
- Generate and review invoices.
- Track alerts, scheduled jobs, backups, and updates.
- Control platform settings, branding, notifications, and access.

## Navigation

The left navigation changes by role. Users see only the pages and records available to their assigned organisation access.

Area	Use it for
Dashboard	Review scoped KPIs, health, consumption, invoices, and projections.
Billing	Review charges, invoices, billing status, and commissions.

Area	Use it for
Documents	View and accept documents or terms.
Regions	Configure platform regions and region operations.
Relationships	Manage distributors, partners, and tenants.
Notifications	Review alerts and messages.
Pricing	Manage currencies, price lists, and platform catalogue pricing.
Subscriptions	Create and manage subscriptions, quotas, and resource views.
Catalogue	Review platform catalogue items.
Users	Create users, assign roles, and manage authentication actions.
Settings	Manage platform settings, themes, backups, notifications, jobs, and updates.

## User Roles

Role family	Typical access
PlatformAdministrator	Full platform administration.
PlatformReader	Platform-level read-only access.
PlatformService	Automation access for platform service tasks.
DistributorAdministrator	Distributor-scoped management of partners, tenants, users, subscriptions, and reports.
DistributorUser	Distributor-scoped read access where enabled.
PartnerAdministrator	Partner-scoped management of tenants, users, subscriptions, and reports.
PartnerUser	Partner-scoped read access where enabled.
TenantAdministrator	Tenant-scoped management of users, subscriptions, documents, and reports.
TenantUser	Tenant-scoped read access and document acceptance.

## Access

Access depends on the user's role and organisation relationship. If a page, record, button, report, or action is missing, check:

1. The user's role.
2. The user's tenant, partner, distributor, or platform relationship.
3. Whether the relevant feature is enabled in Settings.
4. Whether prerequisite records exist.

# Common Setup Dependencies

If this is missing	Check this first
Pricing, subscriptions, quotas, or usage	At least one enabled region exists.
Partners	A distributor exists.
Tenants	A partner exists.
Billing and invoice data	Usage collection and billing generation have run for the period.
Resource group billing	Azure or Azure Local resource groups are tagged to the CMS subscription.

## Related Pages

- [Authentication and Users](#)
- [Relationships](#)
- [Regions and Platforms](#)
- [Subscriptions and Resource Groups](#)
- [Catalogue, Pricing, and Calculator](#)
- [Usage, Billing, and Invoicing](#)
- [Quotas](#)
- [Alerts, Jobs, and Updates](#)
- [Settings and Operations](#)

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