

Relationships

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Overview

Relationships define the commercial and support hierarchy used by CMS. They connect distributors, partners, tenants, users, subscriptions, billing, commissions, documents, and dashboards.

Purpose

Use Relationships to create and manage the organisations that own or support tenants and subscriptions.

Relationship Hierarchy

```
Distributor
  -> Partner
    -> Tenant
      -> Subscription
```

User Roles

Role family	Typical relationship access
Platform roles	All distributors, partners, and tenants.
Distributor roles	Their distributor, partners, and tenants.
Partner roles	Their partner and tenants.
Tenant roles	Their tenant.

Key Workflows

Create a Distributor

1. Open Relationships.
2. Select the distributor area.
3. Choose New Distributor.
4. Enter display name, description, billing contact, billing address, country, and currency.
5. Review the summary and create the distributor.

Create a Partner

1. Open Relationships.
2. Select the partner area.
3. Choose New Partner.
4. Select the distributor.
5. Enter partner details, billing details, and contact information.
6. Review the summary and create the partner.

Create a Tenant

1. Open Relationships.
2. Select the tenant area.
3. Choose New Tenant.
4. Enter tenant details and billing details.
5. Review the summary and create the tenant.

Configuration

Self-provisioning settings can allow or restrict delegated creation actions. Platform administrators can create relationship records directly. Read-only users can view records but cannot create or change them.

What To Check

If a user cannot create or edit a relationship record, check:

1. The user's role.

2. The user's distributor, partner, or tenant relationship.
3. Whether the required parent record exists.
4. Whether self-provisioning settings allow the action.

Related Pages

- [Authentication and Users](#)
- [Subscriptions and Resource Groups](#)
- [Usage, Billing, and Invoicing](#)
- [Settings and Operations](#)

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