

Partner Admin

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Partner Admin

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Expected behavior

(Available from Admin 2.2.0)

The below documentation describes the process for setting up Partners in admin so that they can create and manage their own tenants.

Partner Tenant: The tenant owned by the Partner which is the link between the Partner and all the partners managed tenants.

Managed Tenant: Tenants that the Partner has full control over.

Step 1: Create a user who will own the Partner Tenant

User -> Create User

This user only needs the "Partner Admin" option selected.

NB: This is the only user that will be able to create managed Tenants.

The screenshot shows the 'Create User' form with the following fields and annotations:

- Active:** Radio buttons for 'Yes' (selected) and 'No'.
- Administrator:** Radio buttons for 'Yes' and 'No' (selected). A red circle highlights the 'No' button. A red arrow points to it with the text: "Partners are NOT Administrators".
- Administrator Level:** A dropdown menu labeled 'Select Level'.
- Partner Admin:** Radio buttons for 'Yes' (selected) and 'No'. A red circle highlights the 'Yes' button. A red arrow points to it with the text: "Partner Admin access, only the Partner tenant owner needs to be setup with this permission".
- System Admin (CloudOne.mobi staff only):** A label next to the 'Administrator' field.
- Partners can create and manage linked tenants:** A green label next to the 'Partner Admin' field.
- Create:** A green button with a checkmark.

Step 2: Create the Partner Tenant

Tenants -> Create Tenant

The package type should be "Partner", this will simplify the partner administration and remove unnecessary functionality like menus and products.

The owner should be the owner created in step 1, with Partner Admin access.

[Home](#) / [Tenants](#) / Create Tenant

Company *	<input type="text"/>
Type *	Independent ▾
Business Type	Restaurant ▾
Package *	Partner ▾
Tenant Managed by	N/A ▾
Owner *	<input type="text"/>

Partner Administrator

Start typing owner name to search

Use the Partner Package

The owner created in step 1 above

Step 3: Create Partner staff (optional)

Login as the owner (created in step 1)

Login as the Partner Tenant (setup in step 2).

Go to Staff (currently only the current owner will be listed)

Create staff as "Partner Admin" staff type, but no other privileges are required.

NB: When staff are created within a Partner Tenant they have full access to manage all of the Managed Tenants.

[Home](#) / [Staff](#) / Create Staff

Position * **Partner Admin staff type**

Staff member * Start typing staff name to search

Staff PIN (4 digits) leave blank to disable functionality

NFC Tag UID

Location

Active ☒ Yes ☐ No

+ Add New Staff Member **No special privileges required**

Step 4: Creating Managed Tenants

Login as the owner (created in step 1).

This can also be done while logged in as an Administrator but then the correct managing Tenant will not be selected automatically.

Tenants -> Create Tenant

NB: Make sure that the "Tenant Managed by" field is populated with the correct Partner Tenant

The owner of this tenant will be the actual Managed Tenants owner as the link to the partner is already created through the "Tenant Managed by" field.

[Home](#) / [Tenants](#) / Create Tenant

Company *

Type * Independent ▾

Business Type Restaurant ▾

Package * Standard ▾

Tenant Managed by PartnerTenant ▾

Owner *

If logged in as the Partner Admin this will be populated automatically

Administrator

Start typing owner name to search

Expected behavior

Partner Tenant Owners:

- Ability to create new Tenants
- Ability to update and delete managed Tenants
- Can manage own staff (create, update, disable)
- Ability to log into any managed tenant and manage them as if they were the owner of the tenant.
- Can manage staff on managed tenants (create, update, disable)
- Can clone external tenant data on a managed tenant
- Can clone menus on managed tenants (only from other managed tenants)

Partner Tenant Staff:

- Ability to log in as any of the managed tenants and manage them as if they were the owner of the tenant.
- Can manage staff on managed tenants (create, update, disable)
- Can clone external tenant data on a managed tenant