Cello How-To Guide

Tenant Management

Contents

1   Tenant Management

Tenant Management is one of the core modules of Techcello application. Tenant Management dashboard provides an overview of all customer accounts managed within your application. From this view you can search by tenant name, subscription package, status, self-registered, and any other assigned attribute. The filters on this view allow you to filter accounts by different categories for easy sorting.

Who is a tenant? If you are focused on enterprise SaaS (Business to Business applications), each of your customer would be a tenant.

Example

If you are developing a HR Payroll processing product, each company that purchases the product becomes the client AKA **tenant**. Each tenant will have Finance resource who will process payroll needs of their employees called as **Users**.

- If your company use salesforce.com for sales force automation, your company is a tenant for salesforce.com.

- If you are focused on B2C, each customer (you and me) will be considered as tenants.

CelloSaaS has implemented "Shared Tenancy" model, which is the best and most economical models available for managing multiple tenants. This chapter explains about the tenant management and the data model behind tenant management.

Multiple Ways to add new Tenants into the System

There are multiple ways to onboard a new tenant. They are

- Using Admin Dashboard
- Self Registration

1.1   On Boarding Using Admin Dashboard

This is a standard way of on boarding new tenants in CelloSaaS where the administrator of the product fill the details of the tenants and provide appropriate software package and pass on the credentials to the tenant and allow him to use the Software.

1.2   Add Tenant

Product admin should provide the necessary details such as Tenant, contact, address, administration, package details.

Product admin should select any one of the package for tenant, based on their need.

While provisioning Tenant, the administrator can set the number of users can be created by the tenant, If number of users is set null, then tenant can have any number of users. If the user count is set, then tenant can have specified number of users only.

Number of users should be greater than or equal to number of users for tenant.

Example: If the tenant has 10 users, then number user value will be greater than or equal to 10.

Add Tenant Screen

Once the tenant is created successfully, the **Tenant Admin role** will be assigned to Tenant instantly. Common roles, Global pickup list and its values will be copied to the newly created tenant by using Tenant Post processor method.

1.3   Tenant Activation Process

When a new tenant is created using Admin Dashboard, the tenant status will be activated immediately but when a tenant created using Self Registration, an activation email will be sent to the respective email id used when the time of registering the tenant; the user must activate the account by clicking on the email link received.

If the user misplace the activation email or if the email lost, alternatively the Product admin or the Tenant who ever created the account can activate the account on behalf of the user.

Navigate to Tenant →Manage Tenants >> Unapproved Tenants Tab

When the user requests the activation email once again, the product admin can get the copy of the email sent to the user in Notification Audit. Navigate to Monitor→Notification

1.4   Configure Subscription

Before Tenants are being created in the system, the subscriptions and associated price plans must be created well ahead, because while creating a tenant, the administrator has to grant a License for the Tenant. To know more about Creating Subscription refer "How to Create Subscriptions".

1.5   Edit Tenant

To edit Tenant details, navigate to Tenant >> Manage Tenant, click on the name of the Tenant to modify or update the Tenant Details.

Note: The Tenant Use details form will be hidden while editing the Tenant Details, because there may be more than 1 user assigned as a Tenant Administrator for a given Tenant, Hence the Edit Tenant Admin User form is kept hidden in the Edit Tenant Form.

Edit Tenant Screen

1.6   Off-Boarding Tenant

The process of removing or hard deleting the complete Tenant information from the system is called as Tenant Off-Boarding. I.e. When the Tenants no longer use the application or when they want to switch to another Provider, tenants can write to Product administrator seeking for de-activation of account. Cello doesn't hard/soft delete option to remove the entire details of the customer using dashboard. In or order to de-activate the Tenant account from the product , Login as Product admin and navigate to Tenant →

Manage Tenant Details →open the tenant in Edit mode→ click on De-activate License Button [Refer Screenshot below]

Edit Tenant

1.7 Tenant Dashboard

Tenant Management Screen

1.8 Self Registration

Similarly Onboarding new customer without using the Admin User Interface can be done using the Service Methods given by celloSaaS. Developers should use these and create Tenants/Manage Tenants, all the actions possible with the User interface can be achieved using the APIs.

Note: Self Registration Capability is only available for the Super Tenant i.e. the Product owner, but it will not be available for SMB, Enterprise or Reseller Tenants

1.9 How to mark packages for Self Registration

Using the Subscription Dashboard, You can create any number of packages. For more details refer subscription management.

Note: In order to display the Subscription Packages in Self-Registration Page, the pricing plan must be configured for the package, else it will not listed in Subscription Plan.

1.10 Pre-Requisites for Creating Tenants

1. Decide where to store Application Specific Data , Refer Data Sharding/Isolation Topic
2. Update Notifications related Settings such as SMTP details, From, To Email by navigating through Notifications→ Notification Management

   a. Click on the dispatch details of all the Notification emails and update the dispatch details, alternatively you can also update it via the Meta tables.
   b. Look for **dbo.EmailDispatchDetails** table in the CelloSaaS MetaData and update all the dispatch details in one go.
   c. In order to test the dispatch details are working, you can try triggering any one of the email process and then confirm.
   d. Make sure the distributed Transactions component is enabled and started. Click here to refer
   e. Notification engine is completely audited on the all the actions performed.
   f. Navigate to Monitor → Notification to see the email audits

3. Create Package, Refer Package Management

4. Alter the Default Settings Template to hold the default properties required to be updated for a Tenant Refer Settings Template

5. When a new created either using Admin Dashboard or Self Registration, the default settings template is automatically assigned and its default values are automatically assigned to the Tenant.

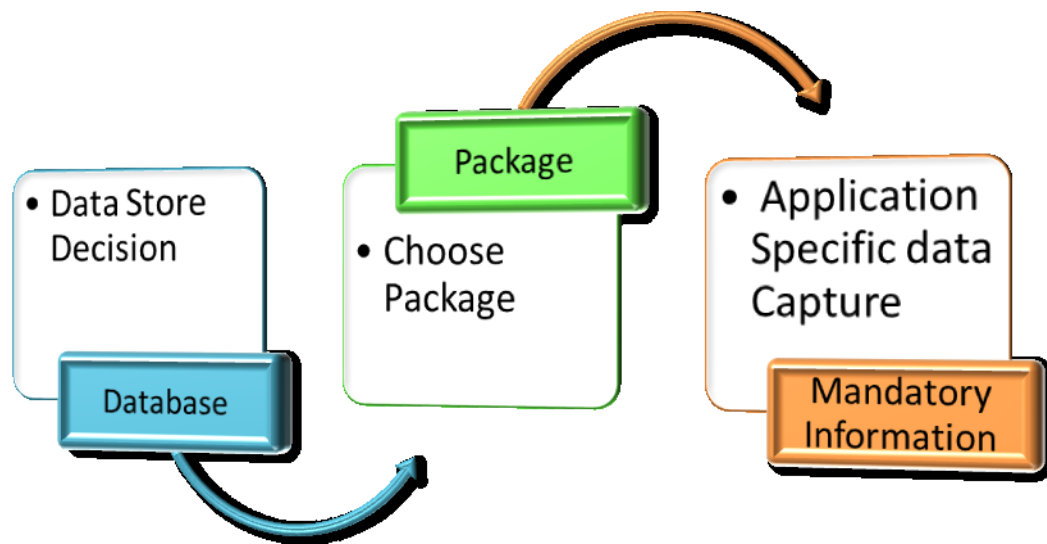6. Provision through User Interface / Provision through Service , Refer Add Tenant

Figure 1-1 – Pre-Requisites for Creating Tenants

Post Process

Create Setting Templates

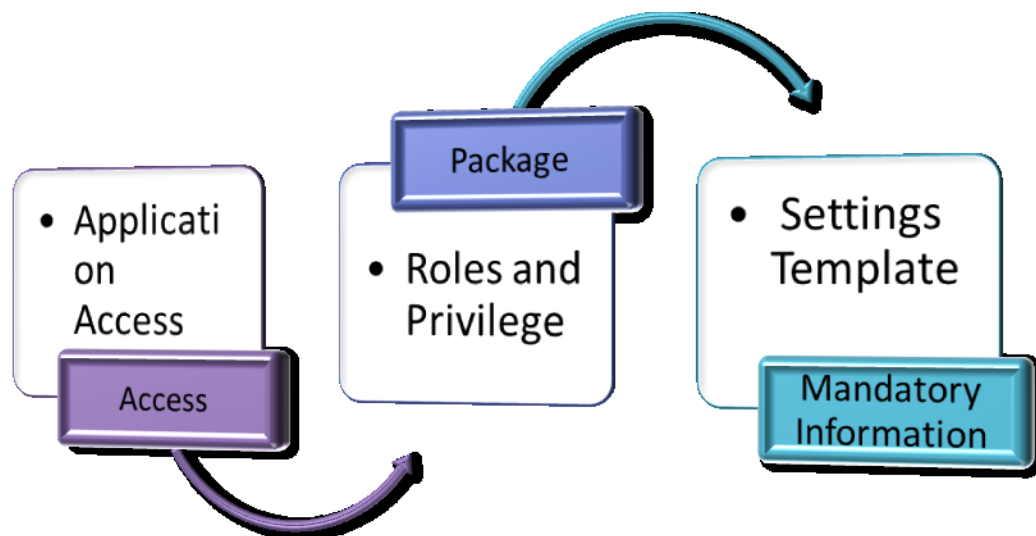Roles and Privilege

Application Access via URL

Figure1 Post Process

2   Tenant Analytics

As part of the Tenant Management, Techcello Provides Tenant Analytics feature which provides detailed analysis about the following information, They are

- Hot Trial - Customers who are in trial period and actively evaluating the product

- Trial Needing Attention - Customers who are in trial period but not evaluating actively.

- Customer Needing Attention – List of all the customers with Low/Medium/High Usage.

3 Contact Information

Any problem using this guide (or) using Cello Framework. Please feel free to contact us, we will be happy to assist you in getting started with Cello.

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