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Documentation Modules

Account Settings

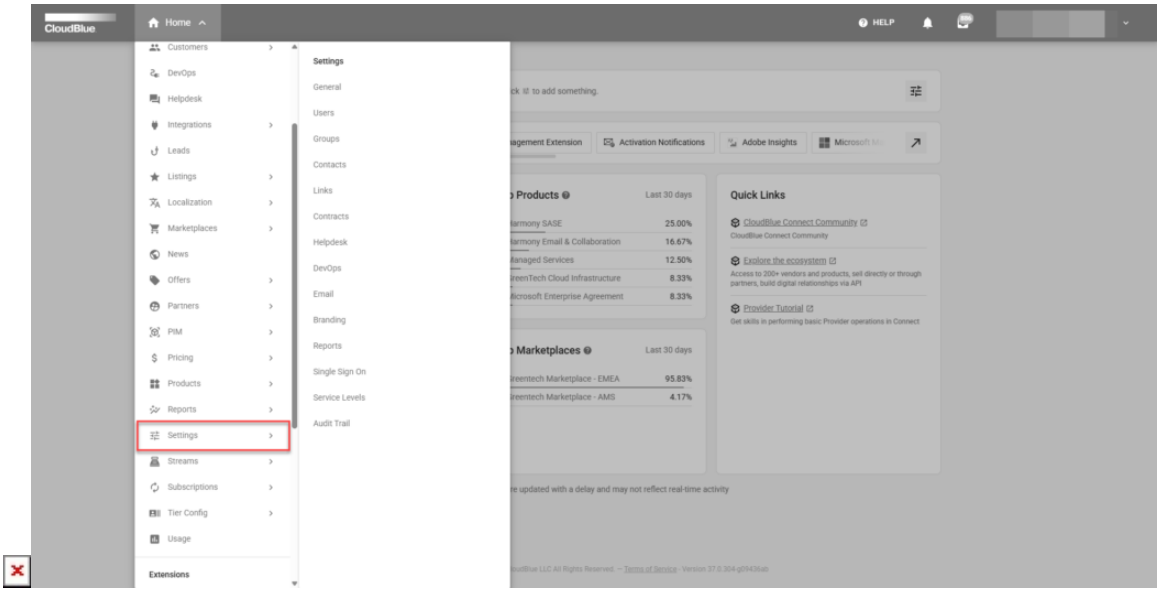
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Auto-generated at November 11, 2026

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Introduction

The Settings module (also called *Account Settings* or *Account* module) allows reviewing and managing account properties (such as added users, groups, contacts, and account links), changing branding configurations for the portals, adjusting your email template and helpdesk configurations, and accessing many other options that affect the workflow of different modules on the CloudBlue Connect® platform.



> **Note**
>
> Your available settings vary depending on your account type. Thus, for example, Vendors cannot access the *Contracts* tab since such accounts typically do not sign the *Service Contracts*. Furthermore, certain settings (such as the *branding*) are only available for Distributor accounts.

Overview

The Settings module is used to access various account-wide configurations and other parameters for customizing your experience on the Connect platform. The following provides a short overview and describes all available options within this module:

- **General**: Use this section to review or edit general account information on your organization. This section also allows adding or removing media data.
- **Users**: Displays users that can access the portal as the account staff. The system allows removing or adding new users in your Connect account.
- **Groups**: This section displays a list of groups for portal access distribution between users. Add or remove groups in this

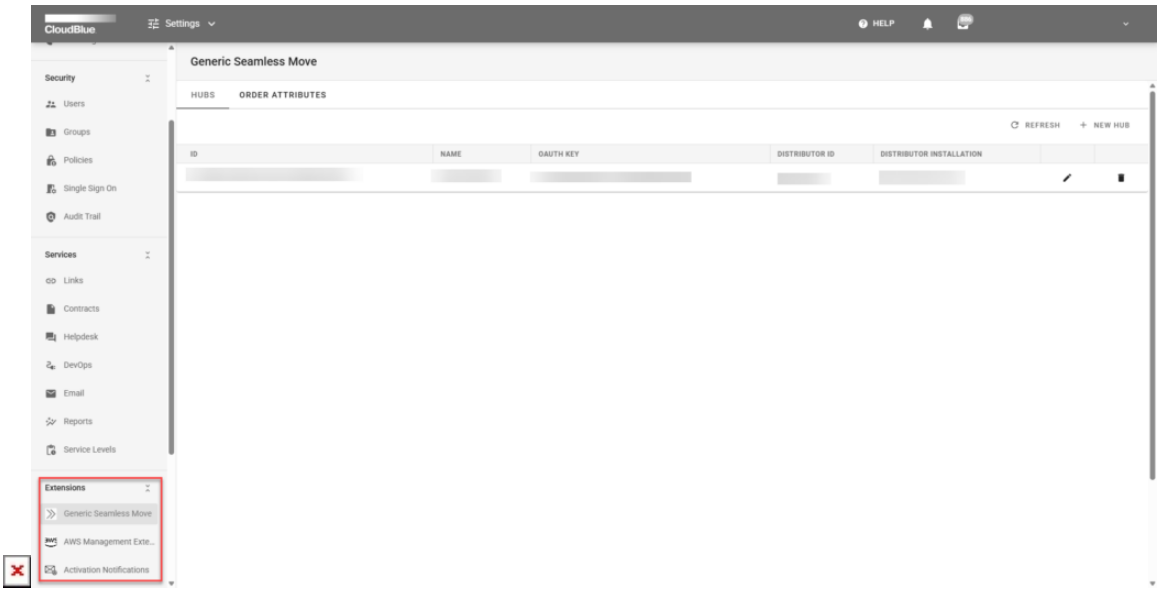
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list and manage permission for each defined group of users.

- **Contacts**: Use this section to manage your *Business* and *Technical* contacts.
- **Links**: Create and manage your provided links via this section. Links can have different scopes on the platform.
- **Contracts** (not available for Vendor accounts): This tab displays your Service Contract used to create this account and a list of permissions on creating various agreement.
- **Helpdesk**: Change your helpdesk mode and adjust the helpdesk case auto-close setting.
- **DevOps**: Manage extensions settings for extensions that have been configured within the DevOps module.
- **Email**: Manage your email notification templates and recipients by using this section.
- **Branding** (available for Distributors only): Configure the portals interface colors, logos, domains, and provide other branding customization.
- **Reports**: Manage your custom report templates and your report repositories.
- **Single Sign-On**: Implement single sign-on authentication and manage your domains via this section.
- **Service Levels**: Allows adjusting the Service Level Management functionality for the provided objects on Connect.
- **Audit Trails**: Access security-relevant chronological records by using this section. The system provides actions, actors, summary, and other technical details for each record.

Extension Settings

The Settings module can also be used to access configuration options for your installed extension. Once an extension that features such options is successfully installed, the Settings module will provide an additional menu for available extension configurations:



Note that certain extensions might not provide account-wide settings, and thus the system will not display the additional menu with options.

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Next Steps

Learn more about each section and all available operations of the Settings module by accessing the following articles:

1. General
2. Contacts
3. Branding
4. Users
5. Groups
6. Single Sign-On
7. Multi-Factor Authentication (MFA)
8. Audit Trail
9. Links
10. Contracts
11. Helpdesk
12. Email Notifications
13. Reports
14. SLM Settings

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