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Groups



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Access the **Groups** menu to create a new group of users, manage group permissions, add existing users to a group or delete groups from the account.

By default, the system provides a group that is called “Administrators”. This group includes all permissions that can be manually adjusted. Group permissions define what Connect modules are available for your specified group of users. Therefore, your users can access Connect modules that are included in their group permissions and cannot access excluded modules.

The following instructions showcase how to add groups to your account, manage your groups, and adjust group permissions on the CloudBlue Connect platform.

Adding Groups

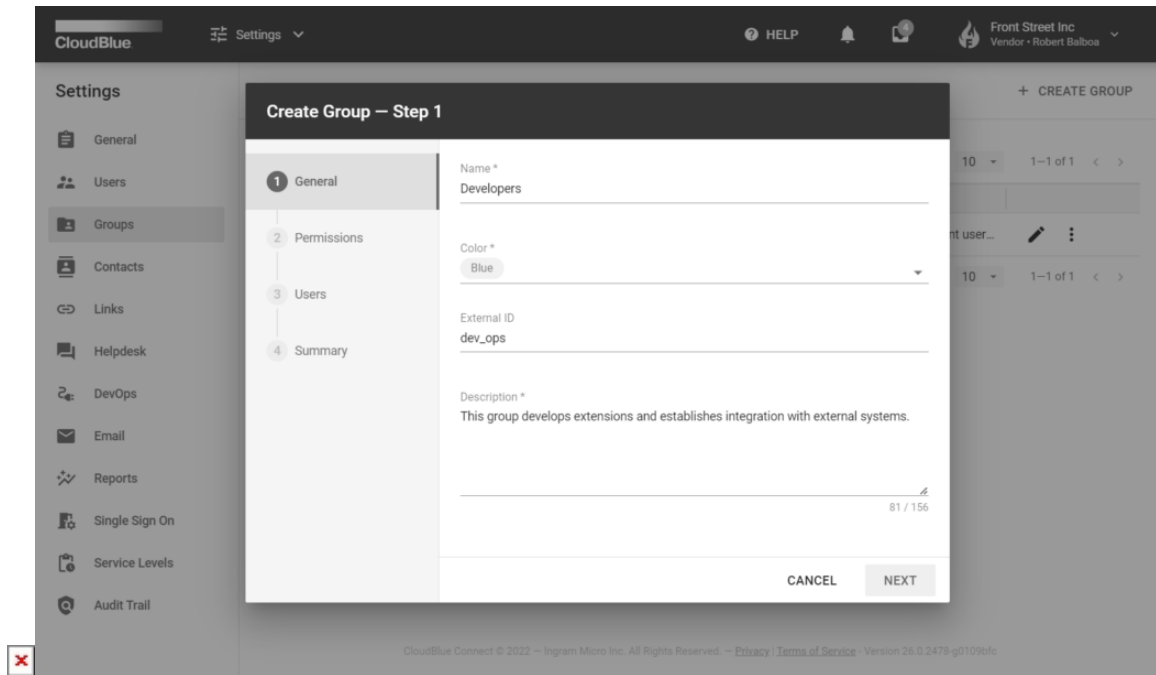
Click the **Add Group** button to launch a group creation wizard. The following wizard steps help you configure a new group:

The screenshot shows the CloudBlue Groups management interface. The top navigation bar includes the CloudBlue logo, a Settings dropdown, and user information for Front Street Inc. The left sidebar lists various settings categories, with 'Groups' currently selected. The main content area displays a table of groups. A '+ CREATE GROUP' button is highlighted in the top right corner of the main area.

NAME	USERS	PERMISSIONS	DESCRIPTION
Administrators Red GR-248-171-001	1	Full	Initial group with all account user...

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CloudBlue

Settings

Front Street Inc
Vendor • Robert Balboa

Settings

- General
- Users
- Groups
- Contacts
- Links
- Helpdesk
- DevOps
- Email
- Reports
- Single Sign On
- Service Levels
- Audit Trail

Create Group — Step 1

1 General

2 Permissions

3 Users

4 Summary

Name *

Developers

Color *

Blue

External ID

dev_ops

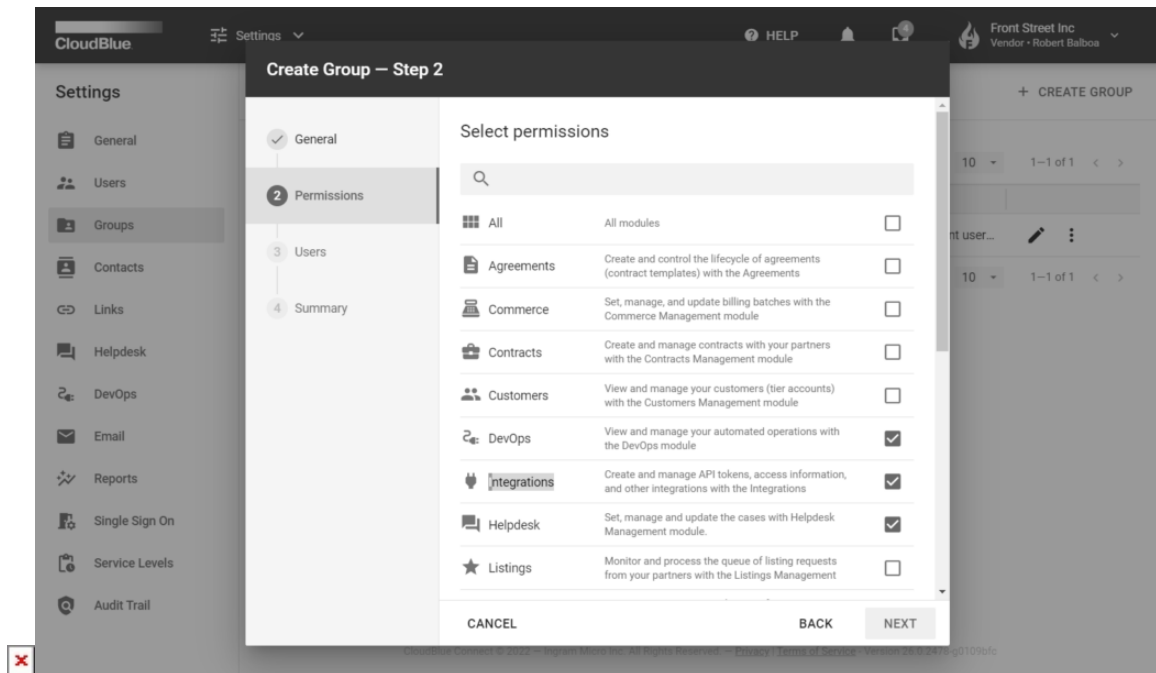
Description *

This group develops extensions and establishes integration with external systems.

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Settings

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Create Group — Step 2

1 General

2 Permissions

3 Users

4 Summary

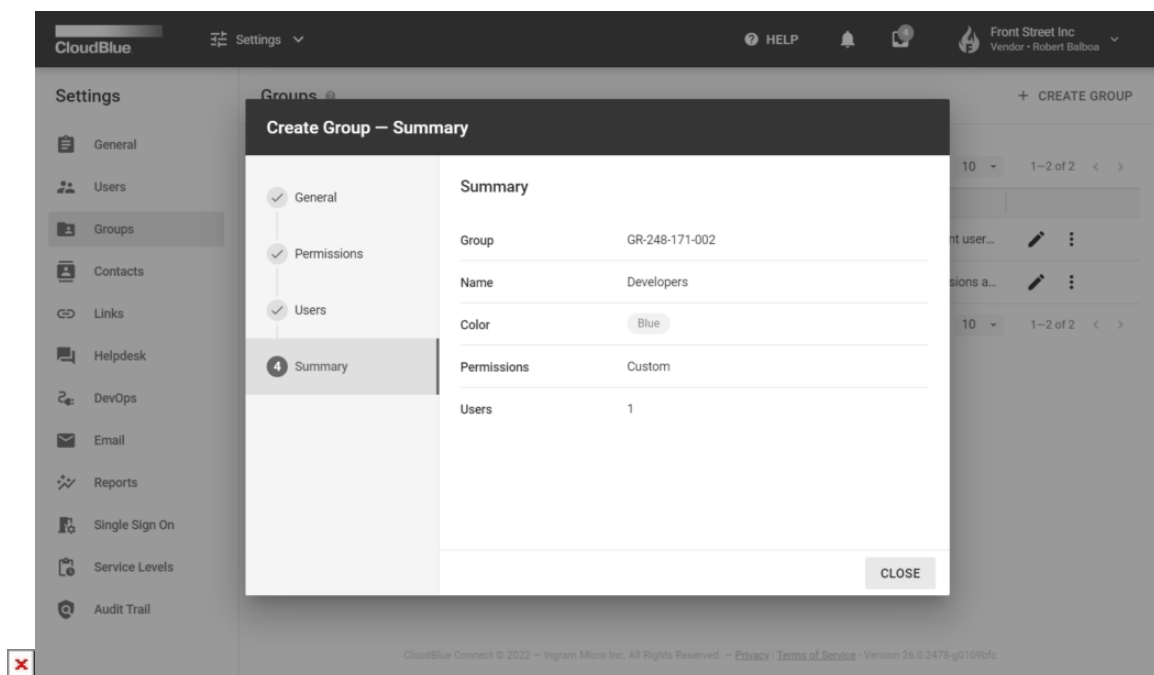
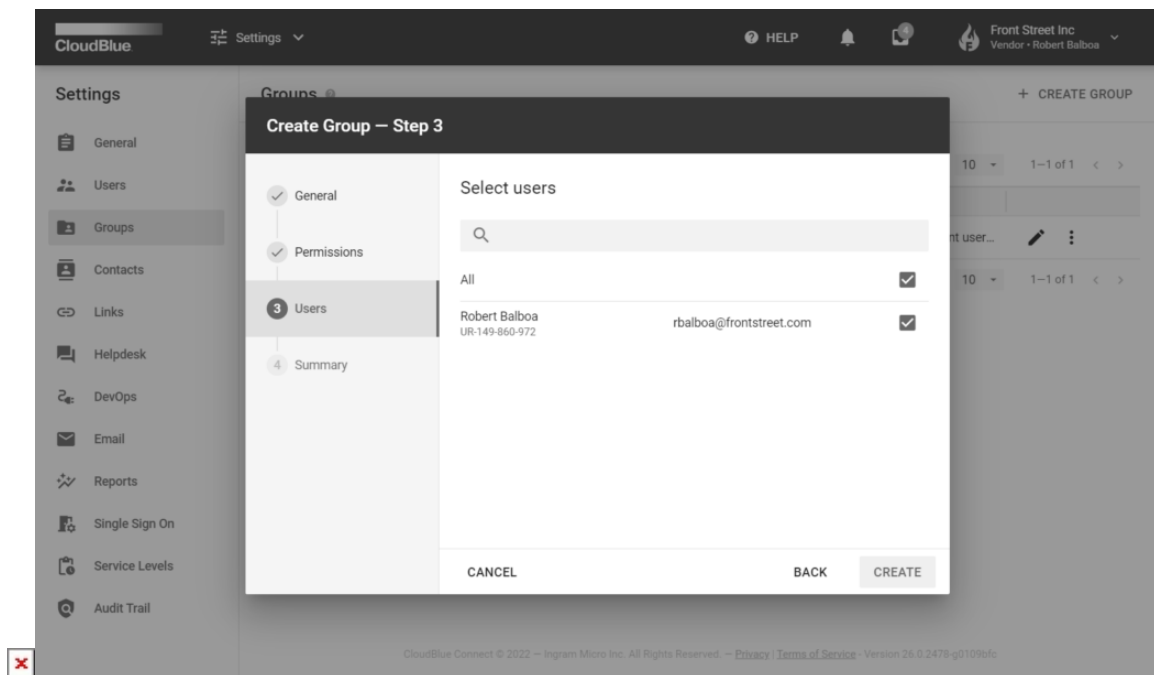
Select permissions

Search

All	All modules	<input type="checkbox"/>
Agreements	Create and control the lifecycle of agreements (contract templates) with the Agreements	<input type="checkbox"/>
Commerce	Set, manage, and update billing batches with the Commerce Management module	<input type="checkbox"/>
Contracts	Create and manage contracts with your partners with the Contracts Management module	<input type="checkbox"/>
Customers	View and manage your customers (tier accounts) with the Customers Management module	<input type="checkbox"/>
DevOps	View and manage your automated operations with the DevOps module	<input checked="" type="checkbox"/>
Integrations	Create and manage API tokens, access information, and other integrations with the Integrations	<input checked="" type="checkbox"/>
Helpdesk	Set, manage and update the cases with Helpdesk Management module.	<input checked="" type="checkbox"/>
Listings	Monitor and process the queue of listing requests from your partners with the Listings Management	<input type="checkbox"/>

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1. **General:** Define your group name, color marker in the UI, description and external ID.
2. **Permissions:** Select required group permissions depending on the group functions.
3. **Users:** Select available account users.
4. **Summary:** Review your created group summary screen.



Manage Your Groups

Locate your group and click the vertical ellipsis (⋮) icon on the corresponding row:

The screenshot shows the CloudBlue Groups management interface. On the left is a sidebar with navigation options: General, Users, Groups (selected), Contacts, Links, Helpdesk, DevOps, Email, Reports, Single Sign On, Service Levels, and Audit Trail. The main area displays a table of groups. The table has columns: NAME, USERS, PERMISSIONS, and DESCRIPTION. Two groups are listed: 'Administrators' (Red) and 'Developers' (Blue). The 'Developers' group is selected, and a context menu is open showing 'Add users' and 'Delete' options. The 'Delete' option is highlighted with a red box. The interface also includes a top navigation bar with 'Settings', 'HELP', and a user profile 'Front Street Inc. Vendor - Robert Balboa'. At the bottom, there is a footer with copyright information: 'CloudBlue Connect © 2022 - Ingram Micro Inc. All Rights Reserved. - Privacy | Terms of Service - Version 26.0.2478-g0109bfc'.

Thereafter, click **Delete** to remove this group or click **Add users** to assign new users to your selected group.

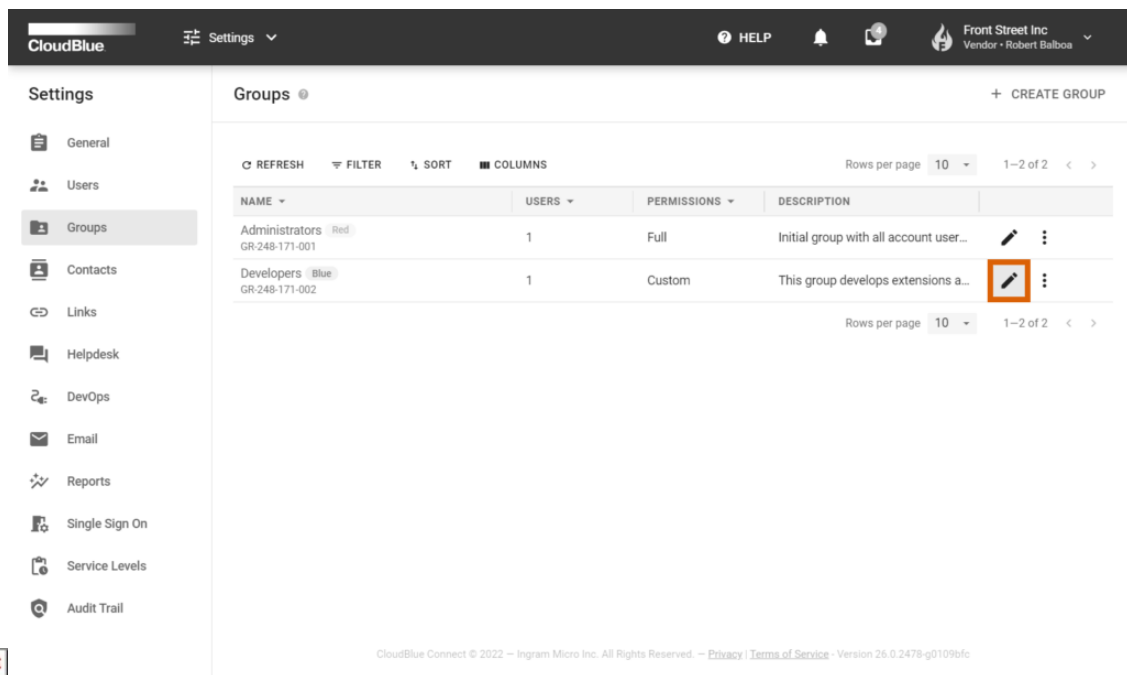


Users and Groups

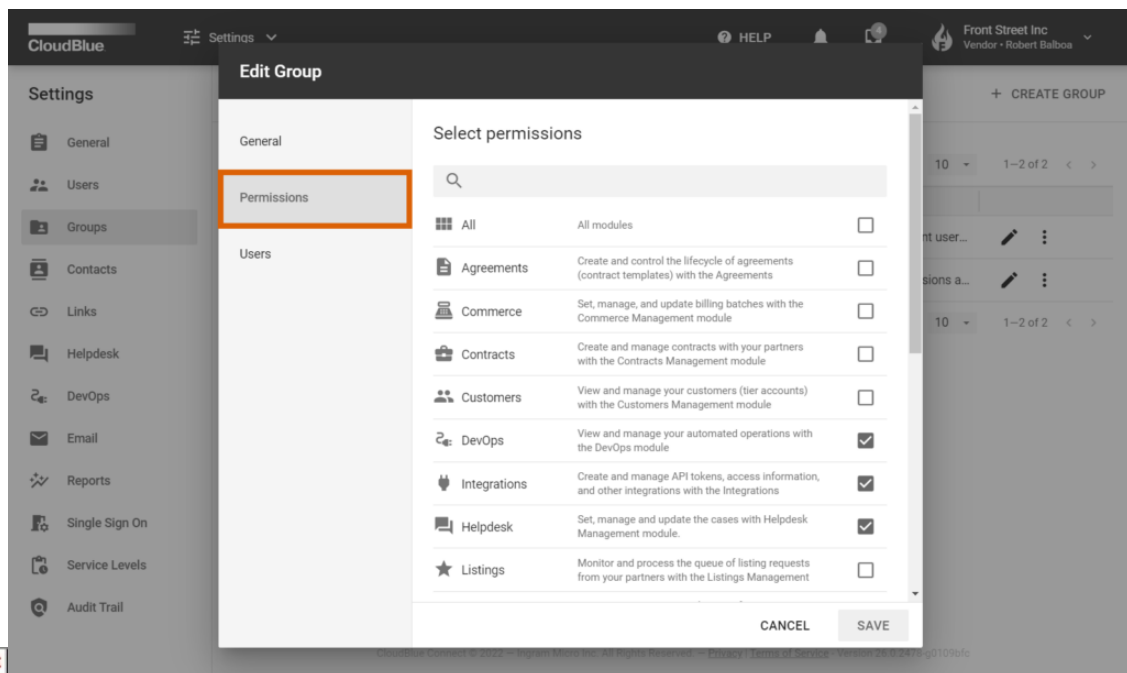
Note that each user must belong to at least one group. Therefore, make sure to assign your new users to a right user group with relevant permissions.

Editing Groups

Edit permissions, included users and other general group data by clicking on the **edit** icon next to your selected group.



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For instance, in case you need to change group permissions, navigate to the **Permissions** tab and exclude or include required Connect modules in the list.

Make sure to click the **Save** button to save your adjustments.