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[Documentation](#) [Modules](#) [Leads](#)

Leads Interface



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The following article describes the graphical user interface of the Leads Management module on the CloudBlue Connect platform. This article also introduces all available operations and functionality of this module.

Directory

The Directory section of the Leads module is used to access a list of all available leads within the account.

Connect		Leads		HELP		10:47 AM	
Leads		DIRECTORY				+ CREATE LEAD	
REFRESH		FILTER		1 SORT APPLIED		COLUMNS	
SEARCH						Rows per page	
LEAD		PRODUCT		MARKETPLACE		DISTRIBUTOR	
Example LLC		Test in CBIC		US Marketplace		CB Demos	
LDR-763-334-272		PRD-017-588-245		MP-71206		PA-855-748	
Previous		Next				Rows per page	
						10	
						1-1 of 1	



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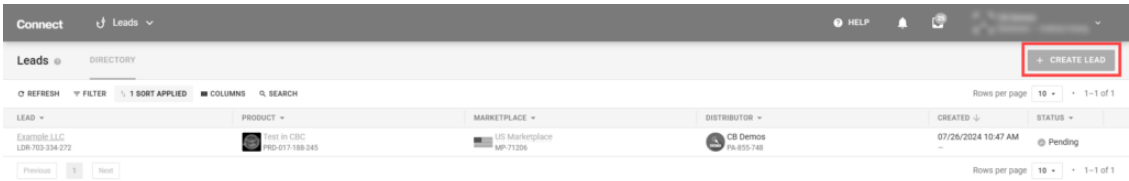


Information

Only Vendors will have access to the Forms page within the Leads module

Create Lead

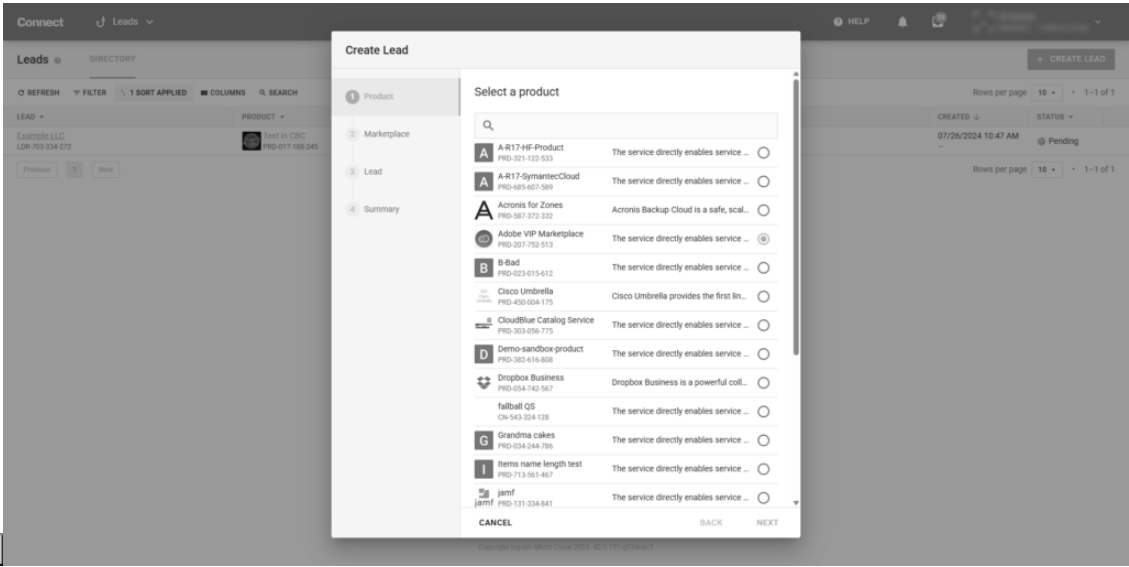
Create a new lead via a lead creation wizard from the **Leads** module.



Click the **Create Lead** button to launch the wizard. Follow the steps below to successfully configure a new lead.

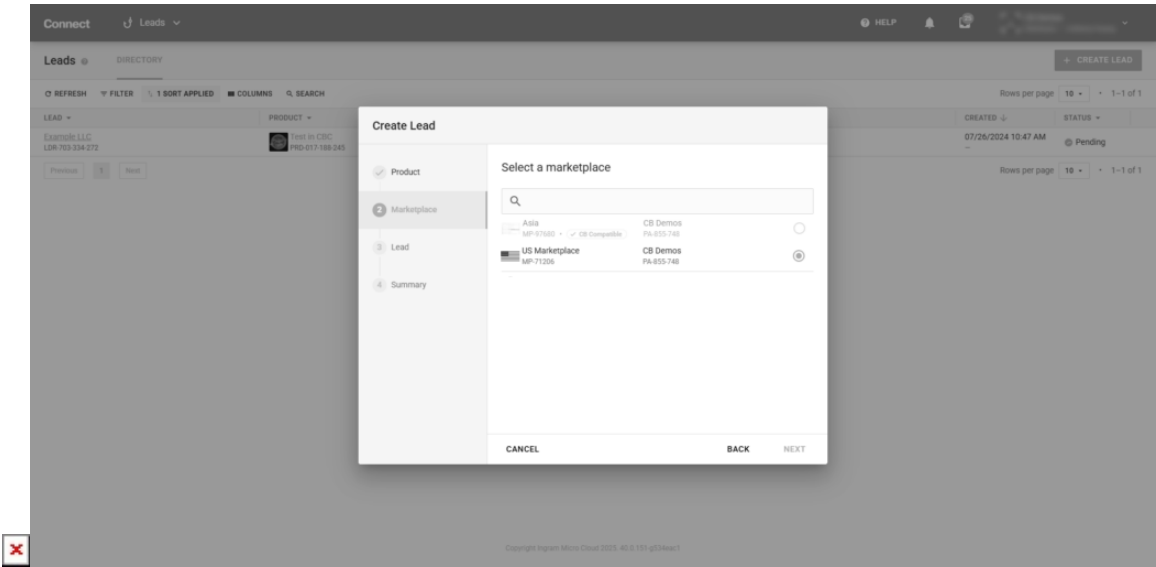
1. Product

The first step is to select the product that is available within the account to create a lead generation for.



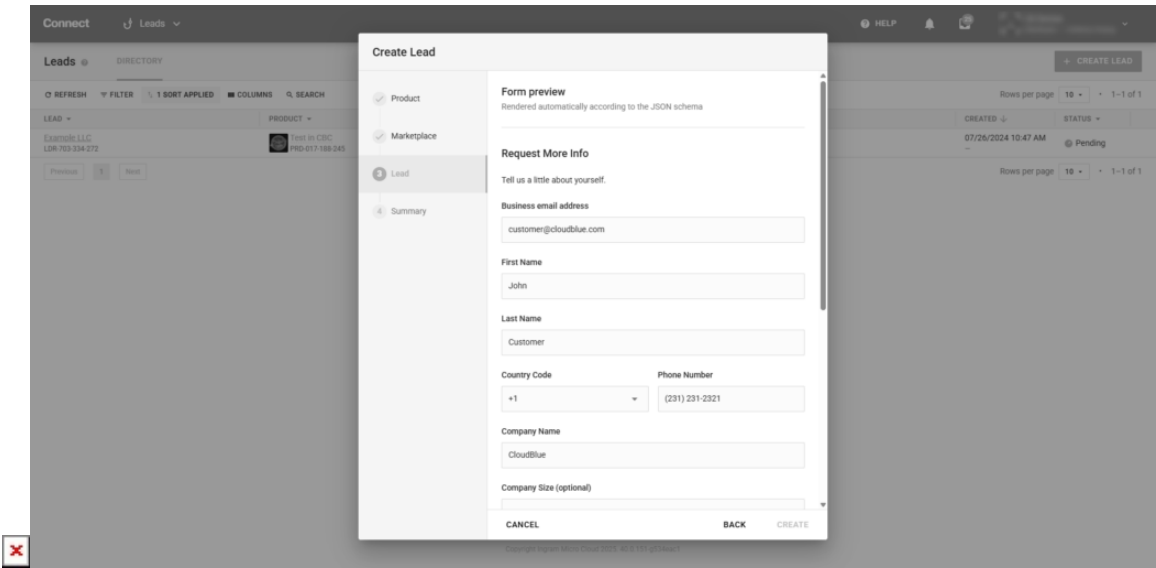
2. Marketplace

The second step is to select the available distributor marketplace that the customer for this lead is coming from.



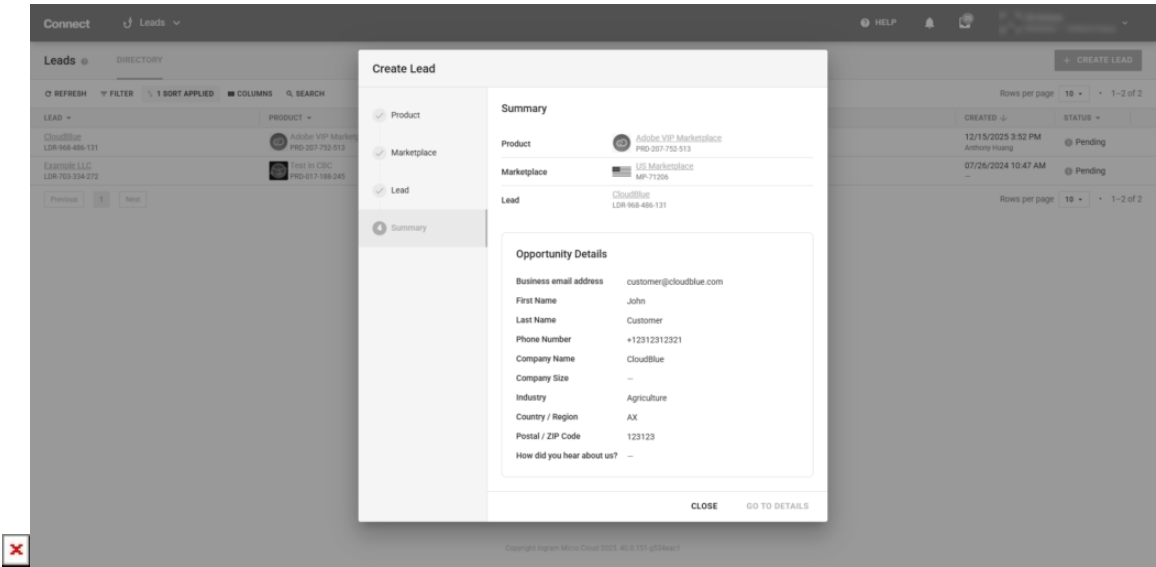
3. Lead

Lastly, fill out the lead information within the lead form in order to capture the detail about the customer or business that is interested in the product



4. Summary

Once the lead is selected with a product, a marketplace, and a filled out form, it can be created. The Summary section provides an overview of the lead that was just created. This lead is now available in both the distributor portal and the vendor (product owner) portal.



The summary list also provide clickable links that redirect to a corresponding object in a new window.

Click the **Go to Details** button to access your lead details screen. Otherwise, click **Close** to close the summary and the wizard.