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# **Reports Interface**

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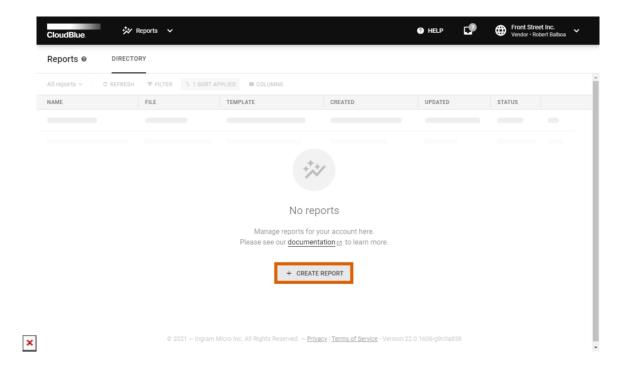


The following provides instructions on how to generate and configure report files. Furthermore, the following guidelines showcase how to schedule your report creation and how to download generated report files.

# **Report Creation**

The **Directory** tab of the **Reports** module is used to generate reports only once. The CloudBlue Connect platform provides a wizard that facilitates and streamlines the report creation procedure. This wizard provides a set of default system templates as well as your custom templates configured via the Reports SDK.

Click the **Create Report** button to launch the report creation wizard.



Follow the wizard instructions to successfully create a report on the Connect platform.

## **Template**

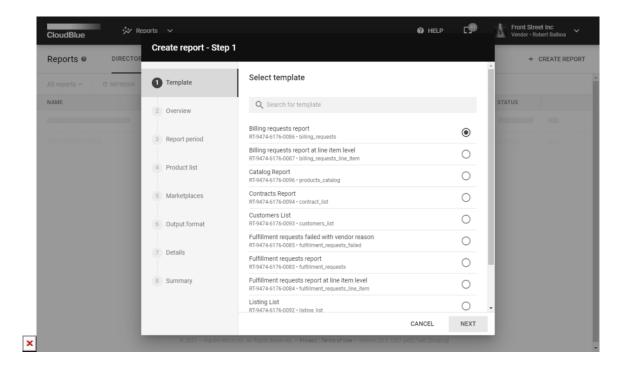
Choose your template from the list. The provided templates represent predefined report formats that allow exporting data from one or multiple Connect modules.



Information

Note that the wizard steps change depending on your selected template.

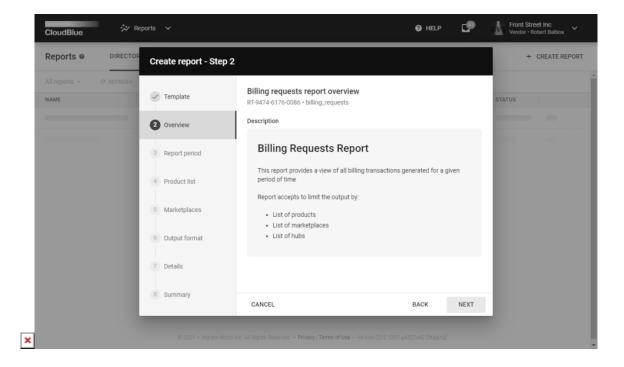




Click the **Next** button to continue.

#### **Overview**

The wizard displays different overviews depending on your selected template.



Review the provided description and click **Next** to continue.



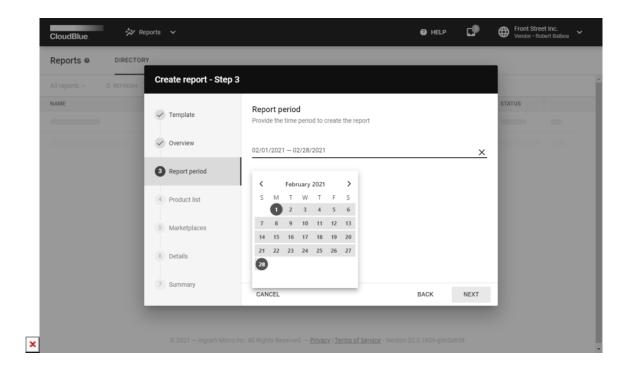
#### **Parameters**

The wizard provides different parameter steps for your selected report template. In general, it requires selecting report period, choosing a product, and specifying marketplaces or statuses. The following example showcases the **Billing Request Report** configuration.

## Report period

Select a report period by clicking on the provided field.

Choose the start date from the calendar by clicking on it. Thereafter, specify the end date by clicking on the calendar once again.

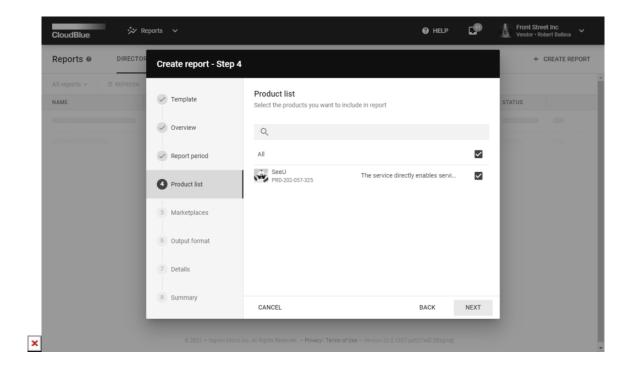


Make sure that selected period is correct and click **Next** to continue.

### **Product list**

Specify a product from the following product list.

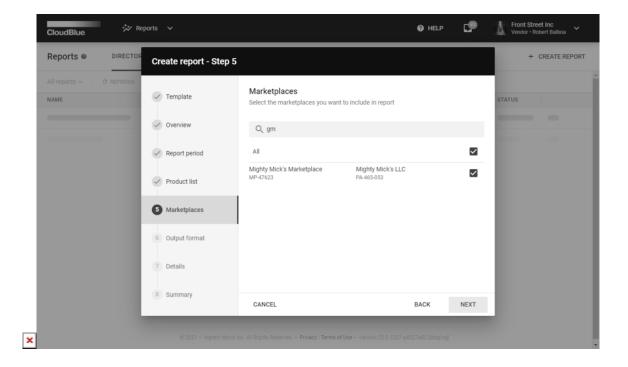




In case you want to select all available products, check the **All** checkbox.

## Marketplace

Select a marketplace from the following list.

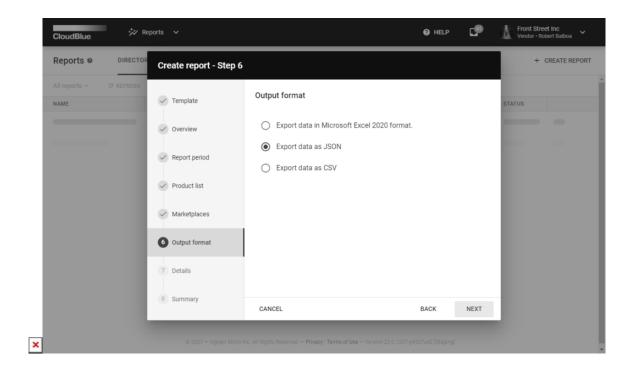


If you want to select all available marketplaces, check the corresponding checkbox.



# **Output Format**

Select XLSX, JSON or CSV as your report file output format. Note that system doesn't allow changing your output format once your report file is created.



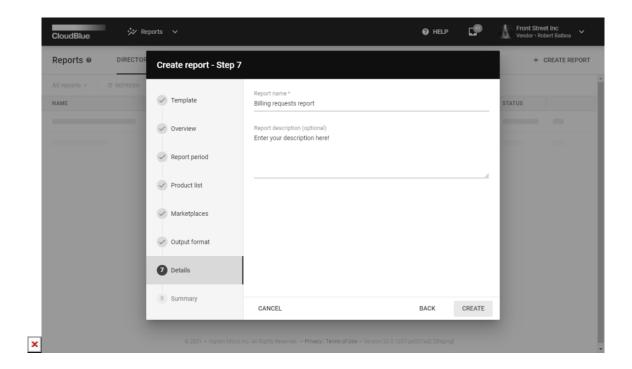
Click **Next** to continue.

# **Details**

Specify the following report details:

- **Report name**: Enter your report name in this field.
- **Report description**: Provide a description for your report (optional)

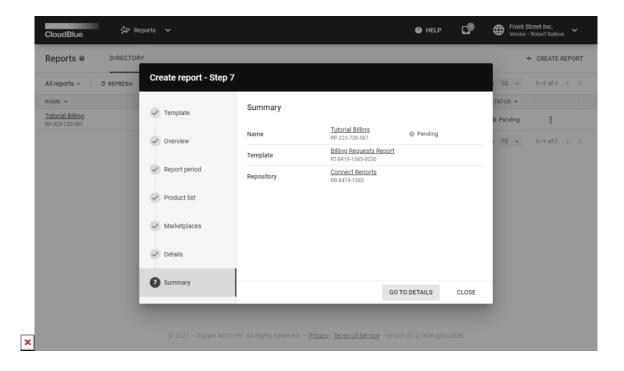




Click **Create** to finalize your export request creation.

# **Summary**

Once your report object is created, the system provides a summary.

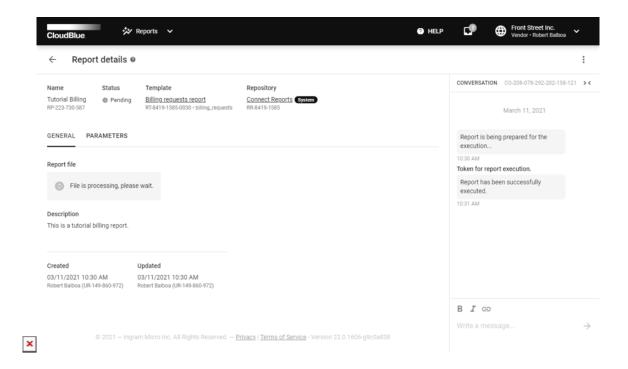


Review the summary and click **Go to Details** to access the Report details screen. Otherwise, click **Close** and return to the Reports module.



# **Report Details**

Click on the <u>report name</u> from the **Directory** tab of the Reports module to access the **Report details** screen.



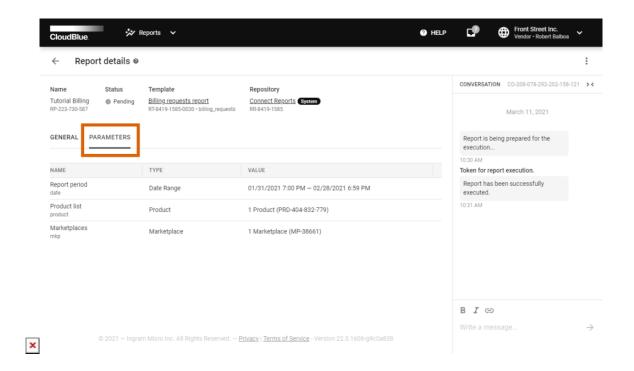
The **Report details** screen contains your report object data. Namely, provided **Name**, specified **Description**, selected **Template**, associated **Dates**, report **Status**, file **Repository** and report type (**System** or **Custom**).

Furthermore, you can use the **Conversation** field to leave a message for your account users or to examine the system messages.

Once the system will successfully process a report file, it will be available for download under **Report file**.

Click on the **Parameters** tab to access your specified parameters.



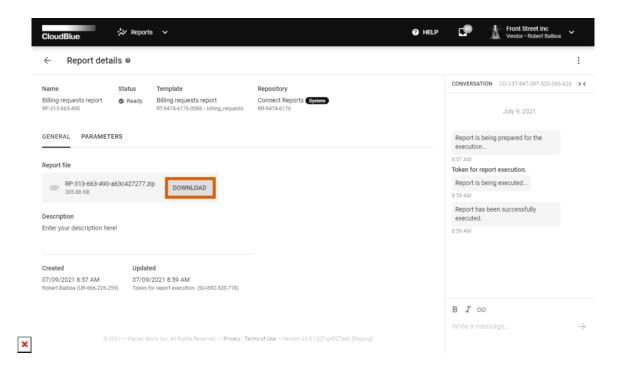


Note that provided parameters vary depending on the selected report template.

# **Downloading Report Files**

Download your report file from the Report details screen.

Make sure that your report status displays "**Ready"**. Thereafter, click the **Download** button to successfully download your report file.



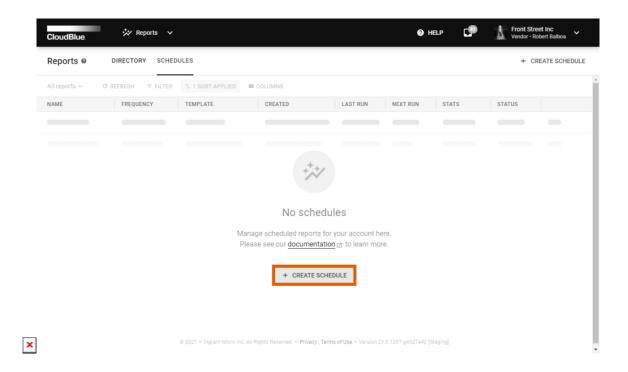


Once your report file is downloaded successfully, you can delete the report object by clicking on the vertical ellipsis icon and selecting the *Delete* option. Note, however, that your deleted report objects cannot be restored.

## **Schedule Creation**

The CloudBlue Connect platform can systematically generate required reports on your scheduled time via the **Schedules** tab. The system allows creating schedule objects by using a wizard that provides various trigger configurations and includes the same set of available templates and report parameters as presented within the report creation creation wizard.

Access the Schedules tab and click the Create Schedule to launch the schedule creation wizard.



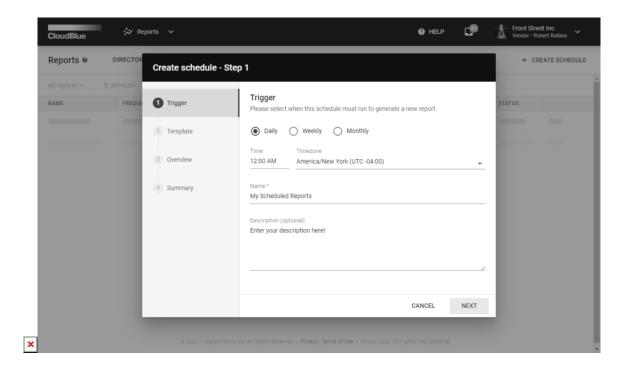
Follow the wizard steps to successfully configure your scheduled reports creation.

## **Trigger**

Specify your schedule trigger configurations as follows:

- **Daily/ Weekly/ Monthly**: The system can generate reports daily, weekly or once a month. Note that the following options vary depending on your selected schedule type.
- Day of month/week: Choose month day or week day by using this field.
- Time: Select your report file creation time.
- **Timezone**: Specify required timezone in this field.
- Name: Enter a name for your schedule object.
- **Description**: Provide a description for your schedule object (optional).

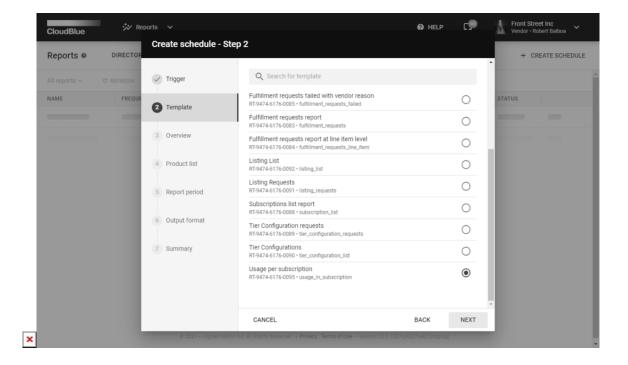




Click Next to continue.

# **Template**

Choose your template from the list. Note that the following steps vary depending on your selected template.

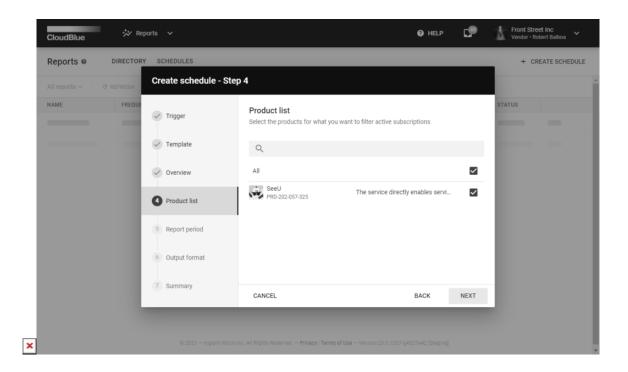


Get familiar with the template overview and continue with report parameters configuration.



## **Product List**

Select a product list in case the system prompts to specify such parameter.



Note that you can select several products or select all of your products by checking the corresponding checkbox.

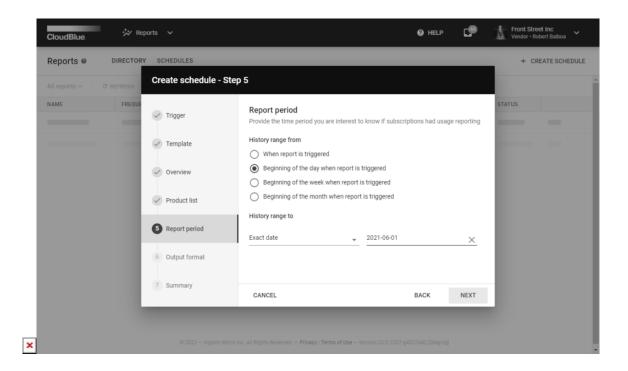
# **Report period**

Fill out the report period form as follows:

- **History range from**: Select the initial history range date in this field. Choose the report trigger date or beginning of the day/week/month when your report is triggered.
- **History range to**: Specify the final history range date or select the number of days/weeks/months before the initial history range date.

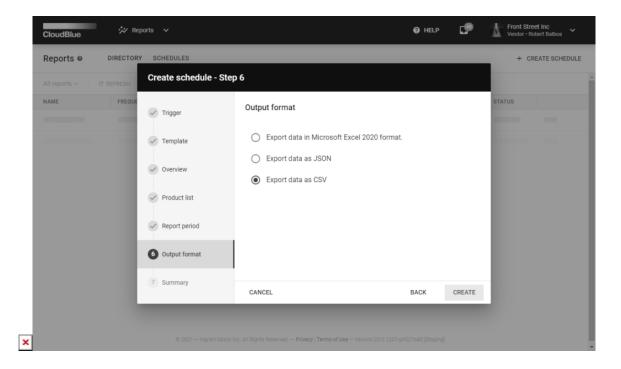






# **Output format**

Select XLSX, JSON or CSV as your report file output format.

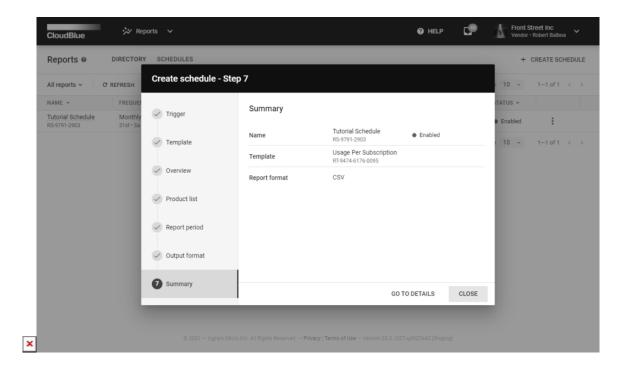


In this case, system allow changing your output format from the *Schedule Details* screen.



# **Summary**

Once your reports schedule is successfully configured, the system provides your created schedule summary as the final step.

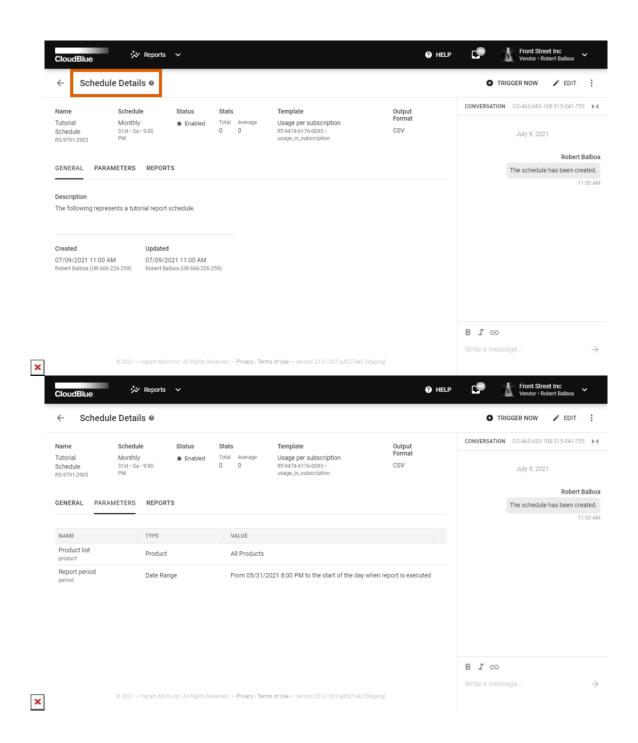


By default your report schedule is enabled. Turn the schedule off and on by clicking the vertical ellipsis (:) icon and using Disable/Enable options from the provided interface.

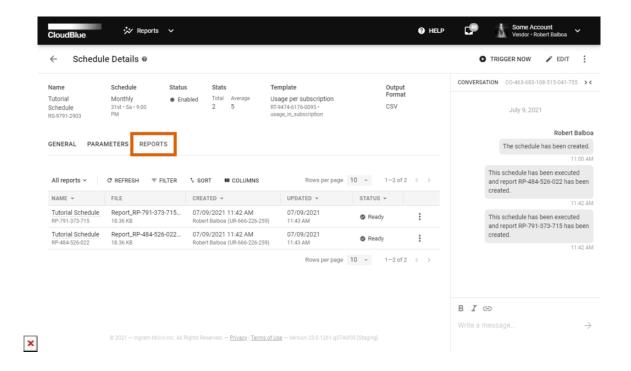
## **Schedule Details**

Click on the <u>schedule name</u> from the Schedules tab to access the **Schedule Details** screen.









This screen displays your selected template, output format, schedule status (*enabled* or *disabled*), specified schedule, description, update and creation date and more.

The Schedule Details screen also allows changing your parameters and trigger options by clicking the **Edit** button at the topright corner of the screen. Review the provided report parameter values by accessing the **Parameters** tab.

Click the **Trigger Now** button to generate a report file immediately. Access and download your report files by using the **Reports** tab of the Schedule Details screen.

Note that your generated reports will also be available via the Directory tab of the Reports module.