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Documentation 🗙 Modules 🔀 Reports 🔀

Reports Interface

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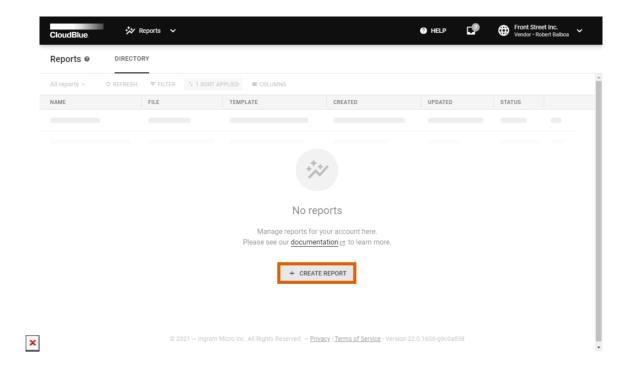
Auto-generated at August 20, 2025

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.

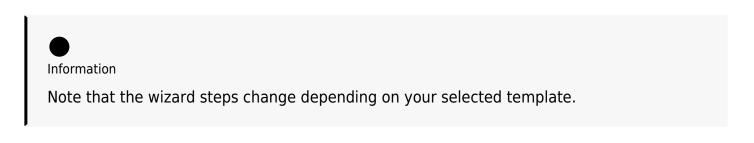
Click the Create Report button to launch the report creation wizard.



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.



Reports O DIRECTO	Create report - Ste	ep 1			+ CREATE R
All reports ~ C REFRESH	Template	Select template			
NAME	2 Overview	Q Search for template			STATUS
	3 Report period	Billing requests report RT-9474-6176-0086 • billing_requests		۲	
		Billing requests report at line item level RT-9474-6176-0087 * billing_requests_line_item		\bigcirc	
	4 Product list	Catalog Report RT-9474-6176-0096 • products_catalog		\bigcirc	
	5 Marketplaces	Contracts Report RT-9474-6176-0094 • contract_list		\bigcirc	
	6 Output format	Customers List RT-9474-6176-0093 • customers_list		\bigcirc	
		Fulfillment requests failed with vendor reason RT-9474-6176-0085 * fulfillment_requests_failed		\bigcirc	
	7 Details	Fulfillment requests report RT-9474-6176-0083 • fulfillment_requests		\bigcirc	
	8 Summary	Fulfillment requests report at line item level RT-9474-6176-0084 • fulfillment_requests_line_item		\bigcirc	
		Listing List RT-9474-6176-0092 • listina list		\bigcirc	
			CANCEL	NEXT	

Click the **Next** button to continue.

Overview

The wizard displays different overviews depending on your selected template.

Reports O DIRECTO	Create report - Step	02	+ CREATE RE
All reports ~ O REFRESH	✓ Template	Billing requests report overview RT-9474-6176-0086 • billing_requests	STATUS
	2 Overview	Description	-
	3 Report period	Billing Requests Report	
	4 Product list	This report provides a view of all billing transactions generated for a given period of time	
	5 Marketplaces	Report accepts to limit the output by: • List of products • List of marketplaces	
	6 Output format	List of hubs	
	7 Details		
	8 Summary	CANCEL BACK NEXT	

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.

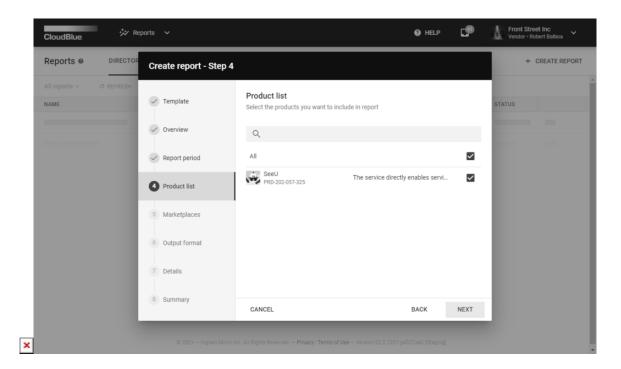
Choose the start date from the calendar by clicking on it. Thereafter, specify the end date by clicking on the calendar once again.

All reports ~ C REFRE	Create report - S	Step 3			
NAME	Template	Report period Provide the time period to create the	report		STATUS
	 Overview 	02/01/2021 — 02/28/2021		×	
	3 Report period	< February 2021 >			
	4 Product list	S M T W T F S 1 2 3 4 5 6			
	5 Marketplaces	7 8 9 10 11 12 13			
	6 Details	14 15 16 17 18 19 20 21 22 23 24 25 26 27 28			
	7 Summary	CANCEL	BACK	NEXT	

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

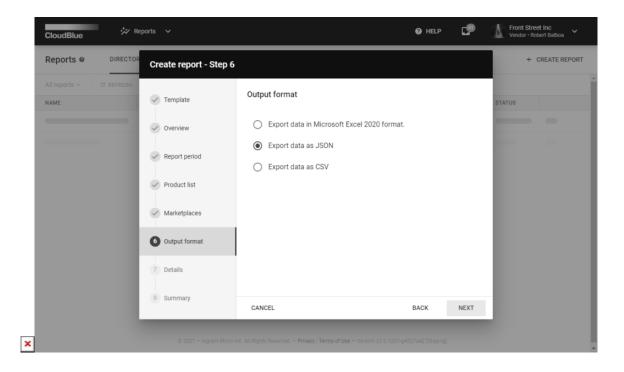
Select a marketplace from the following list.

Reports DIRECTO	Create report - Step	5			+ CREATE REF
All reports ~ Ø REFRESH	✓ Template	Marketplaces Select the marketplaces you want	to include in report		STATUS
	 Overview 	Q gm			
	Report period	All		\checkmark	
	Product list	Mighty Mick's Marketplace MP-47623	Mighty Mick's LLC PA-465-053	7	
	5 Marketplaces				
	6 Output format				
	7 Details				
	8 Summary	CANCEL	BACK	NEXT	

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)

Reports O DIRECTO	Create report - Step	17		_	+ CREATE REPORT
All reports ~ Ø REFRESH	Template	Report name * Billing requests report			STATUS
	Overview	Report description (optional) Enter your description here!			
	Report period				
	Product list			li.	
	✓ Marketplaces				
	 Output format 				
	Details				
	8 Summary	CANCEL	BACK	CREATE	

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

Summary

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

	Create report - Ste	p 7				
All reports ~ C REFRE	ESH					10 - 1-1 of 1
NAME -	✓ Template	Summary				TATUS -
Tutorial Billing RP-223-730-587			Tutorial Billing			Pending
	Overview	Name	RP-223-730-587	Pending		• 10 • 1-1 of 1 <
		Template	Billing Requests Repor RT-8419-1585-0030	<u>t</u>		
	 Report period 	Repository	Connect Reports RR-8419-1585			
	Product list					
	✓ Marketplaces					
	✓ Details					
	Summary			O TO DETAILS	CLOSE	

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.

CloudBlue.	r Reports 🗸		? Help	CP	Front Street Inc. Vendor • Robert Balbo	ia *
← Report details	0					:
Name Status Tutorial Billing @ Pending RP-223-730-587	Template Billing requests report RT-8419-1585-0030 • billing_requests	Repository Connect Reports (System) RR-8419-1585		CONVERSAT	ON CO-208-078-292-202-15 March 11, 2021	i8-121 > <
GENERAL PARAMETERS				Report is b execution.	eing prepared for the	
Report file				10:30 AM Token for re	port execution.	
File is processing, pleat	ase wait.				been successfully	
Description This is a tutorial billing report.				10:31 AM		
Created	Updated					
03/11/2021 10:30 AM Robert Balboa (UR-149-860-972)	03/11/2021 10:30 AM Robert Balboa (UR-149-860-972)					
				BIG	>	
© 2021 — Ing	gram Micro Inc. All Rights Reserved. — <u>F</u>	Privacy Terms of Service - Version 22.0.1606-g9c0a838		Write a me	essage	\rightarrow

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.

				CONVERSATION C0-208-078-292-202-158-
Name Tutorial Billing RP-223-730-587	Status Pending	Template <u>Billing requests report</u> RT-8419-1585-0030 • billing_requests	Repository Connect Reports System RR-8419-1585	March 11, 2021
GENERAL P/	ARAMETERS			Report is being prepared for the execution
NAME		TYPE	VALUE	10:30 AM Token for report execution.
Report period date		Date Range	01/31/2021 7:00 PM - 02/28/2021 6:59 PM	Report has been successfully executed.
Product list product		Product	1 Product (PRD-404-832-779)	10:31 AM
Marketplaces mkp		Marketplace	1 Marketplace (MP-38661)	

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.

← Report detai	Is @				
Name Billing requests report RP-313-663-490	Status Template Ready Billing requests reprint RT-9474-6176-0086 -		Reports System	CONVERSATION CO-137-847-387-520	-366-62
GENERAL PARAMETE	RS			Report is being prepared for the execution	
Report file				8:57 AM Token for report execution.	
@ RP-313-663-490-a	53c427277.zip DOWNLOAD	1		Report is being executed	
305.88 KB	DOWINEOAD			8:59 AM	
Description				Report has been successfully executed.	
Enter your description here	1			8:59 AM	
Created	Updated				
07/09/2021 8:57 AM Robert Balboa (UR-666-226-259	07/09/2021 8:59 AM Token for report execution. (SU-	892-520-718)			
				B I 🖘	

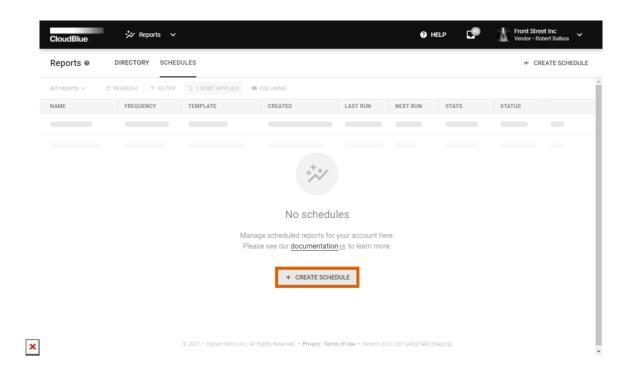
Once your report file is downloaded successfully, you can delete the report object by clicking on the vertical ellipsis icon and selecting the *Delete* option. Note, however, that your deleted report objects cannot be restored.

Schedule Creation

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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.

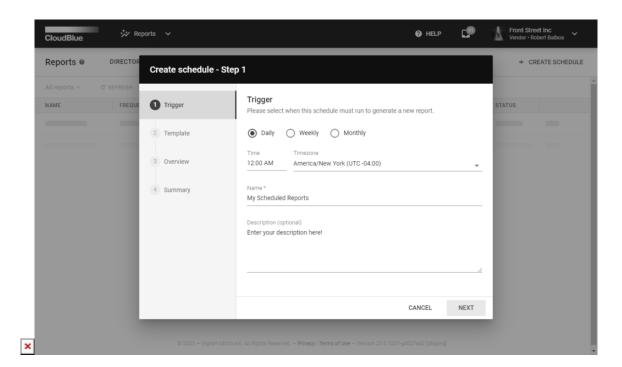


Follow the wizard steps to successfully configure your scheduled reports creation.

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.

Reports 🛛	DIRECTOR	Create schedule -	Step 2			+ CREATE SCHE
	C REFRESH	✓ Trigger	Q. Search for template			
NAME	FREQUE	2 Template	Fulfillment requests failed with vendor reason RT-9474-6176-0085 • fulfillment_requests_failed		\circ	STATUS
			Fulfillment requests report RT-9474-6176-0083 • fulfilment_requests		\bigcirc	
		3 Overview	Fulfillment requests report at line item level RT-9474-6176-0084 • fulfilment_requests_line_item		\bigcirc	
		4 Product list	Listing List RT-9474-6176-0092 • listing_list		\bigcirc	
		5 Report period	Listing Requests RT-9474-6176-0091 • listing_requests		\bigcirc	
			Subscriptions list report RT-9474-6176-0088 • subscription_list		\bigcirc	
		6 Output format	Tier Configuration requests RT-9474-6176-0089 • tier_configuration_requests		\bigcirc	
		7 Summary	Tier Configurations RT-9474-6176-0090 • tier_configuration_list		\bigcirc	
			Usage per subscription RT-9474-6176-0095 • usage_in_subscription		۲	
			CANCEL	BACK	NEXT	

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.

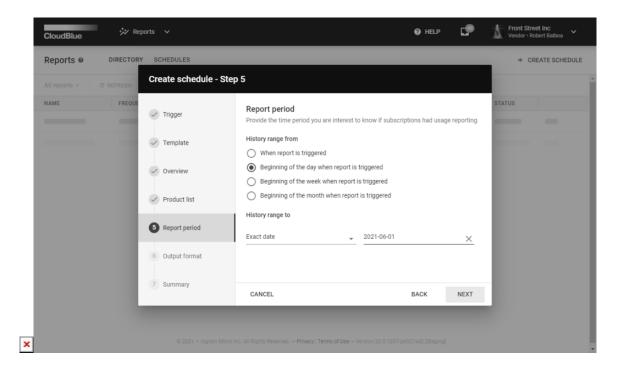
	REFRESH	Create schedule - S	Step 4			
NAME	FREQUE	✓ Trigger	Product list Select the products for what y	ou want to filter active subscriptions		STATUS
		✓ Template	Q			
		 Overview 	All		\checkmark	
		Product list	SeeU PRD-202-057-325	The service directly enables servi	\checkmark	
		5 Report period				
		6 Output format				
		7 Summary	CANCEL	BACK	NEXT	

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.

Create schedule - St	ep 6			
FREQUE				
Trigger	Output format			STATUS
Template	O Export data in Microsoft Excel 2020 format.			and the second se
Overview	C Export data as JSON			
Under the second s	Export data as CSV			
Product list				
Report period				
6 Output format				
7 Summary				
	 Template Overview Product list Report period Output format 	 Template Overview Product list Report period Output format 	 Template Overview Product list Report period Output format 	 Template Overview Product list Report period Output format

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

Summary

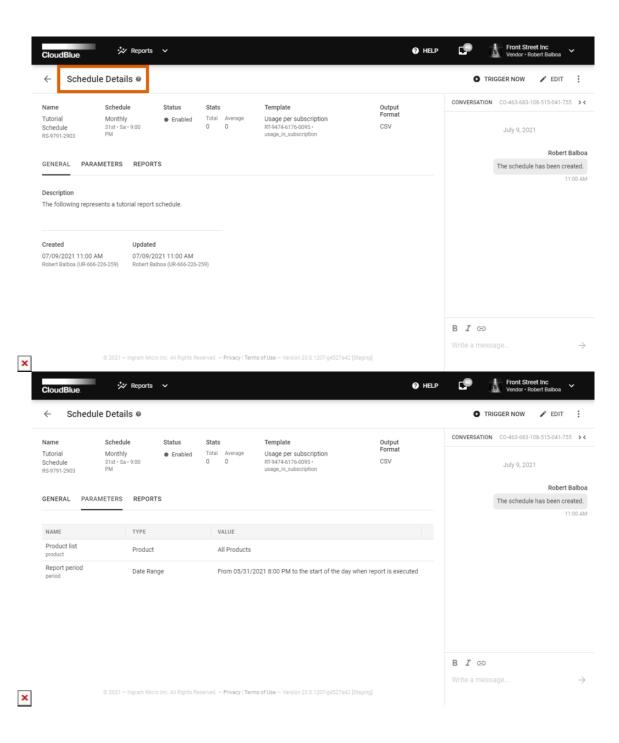
All reports ~ C REFRESH	10 - 1-1 of 1			
NAME - FREQ Tutorial Schedule Mont	hly 🗸 Trigger	Summary		TATUS ~
RS-9791-2903 31st •	Sa Template	Name	Tutorial Schedule RS-9791-2903 • Enabled	• 10 • 1-1 of 1
		Template	Usage Per Subscription RT-9474-6176-0095	
	Overview	Report format	CSV	
	Product list			
	Report period			
	✓ Output format			
	Summary		GO TO DETAILS	CLOSE

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.



Name Tutorial Schedule RS-9791-2903	Schedule Statu Monthly En 31st • Sa • 9:00 PM	abled Total Average U 2 5 R	Template Jsage per subscription RT-9474-6176-0095 • Jsage_in_subscription	Output Format CSV		CONVERSATIO	V CO-463-683-108-515-041-75 July 9, 2021
GENERAL PARA	AMETERS REPORTS						Robert The schedule has been cr
All reports ~	C REFRESH ₹ FILTER	1 SORT III COLUMNS	Rows per page		< >	an	is schedule has been execut d report RP-484-526-022 has eated.
NAME V Tutorial Schedule	FILE Report_RP-791-373-715	CREATED ~ 07/09/2021 11:42 AM	UPDATED - 07/09/2021	STATUS 👻	:	Th	1 is schedule has been execut
RP-791-373-715 Tutorial Schedule RP-484-526-022	18.36 KB Report_RP-484-526-022 18.36 KB	Robert Balboa (UR-666-226-259) 07/09/2021 11:42 AM Robert Balboa (UR-666-226-259)	11:43 AM 07/09/2021 11:43 AM	🖉 Ready	:		and report RP-791-373-715 ha created.
			Rows per page	10 - 1-2 of 2	< >		

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.