



<https://cloudblue.com>

Documentation Modules Reports

# Reports Interface



This article has been generated from the online version of the documentation and might be out of date. Please, make sure to always refer to the online version of the documentation for the up-to-date information.

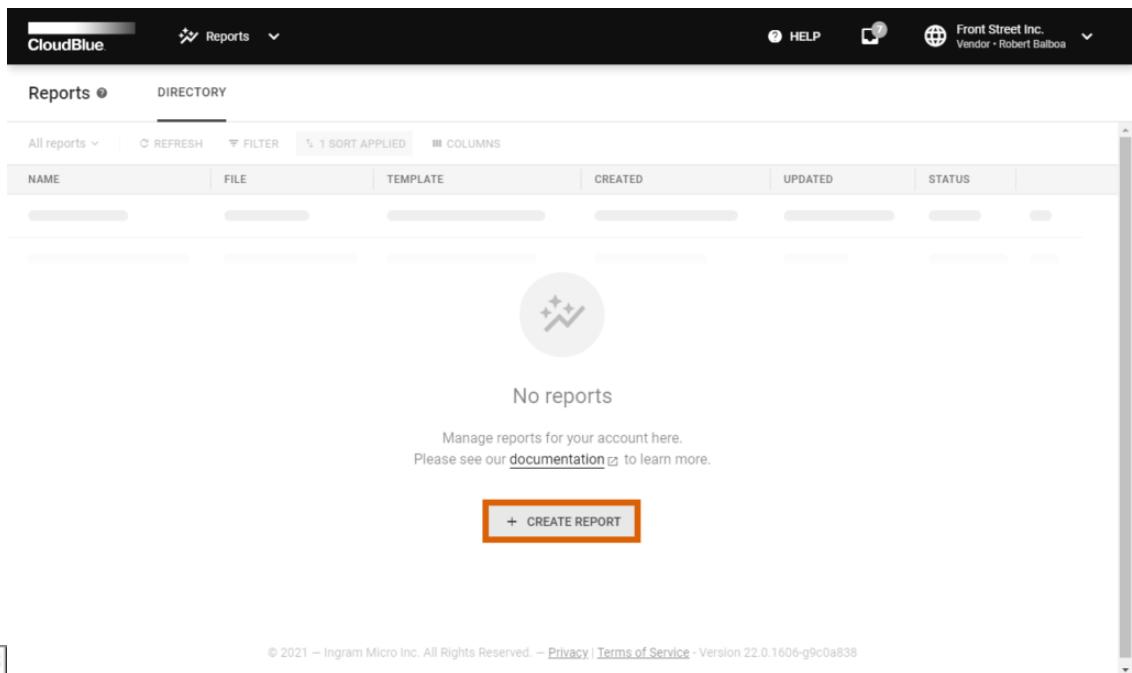
Auto-generated at February 15, 2026

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.



The screenshot shows the 'Reports' module interface. At the top, there is a navigation bar with the CloudBlue logo, a 'Reports' dropdown, and various user and system icons. Below the navigation bar, the main area is titled 'Reports' and 'DIRECTORY'. A sub-header 'All reports' includes buttons for 'REFRESH', 'FILTER', and '1 SORT APPLIED'. A 'COLUMNS' button is also present. A horizontal table header row contains columns for 'NAME', 'FILE', 'TEMPLATE', 'CREATED', 'UPDATED', and 'STATUS'. In the center of the page, there is a large circular icon with a plus sign and a checkmark, and the text 'No reports'. Below this, a message reads: 'Manage reports for your account here. Please see our [documentation](#) to learn more.' At the bottom of the page, there is a red-bordered button labeled '+ CREATE REPORT' and a copyright notice: '© 2021 – Ingram Micro Inc. All Rights Reserved. – [Privacy](#) | [Terms of Service](#) - Version 22.0.1606-g9c0a838'.

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

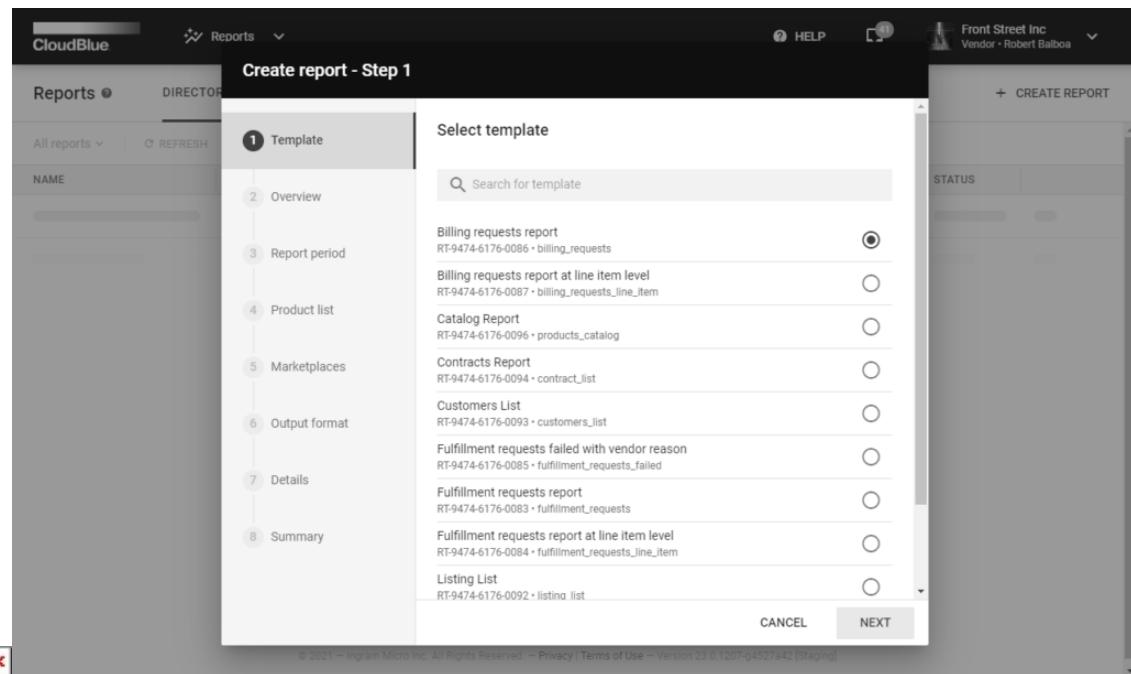
## Template

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



Information

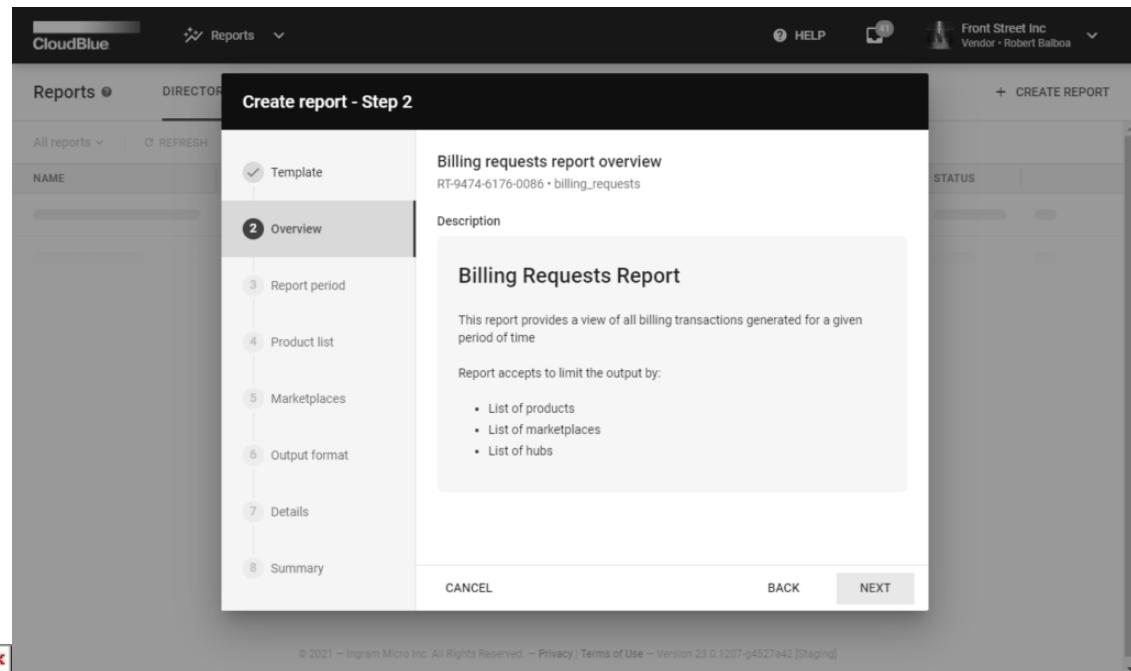
Note that the wizard steps change depending on your selected template.



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.



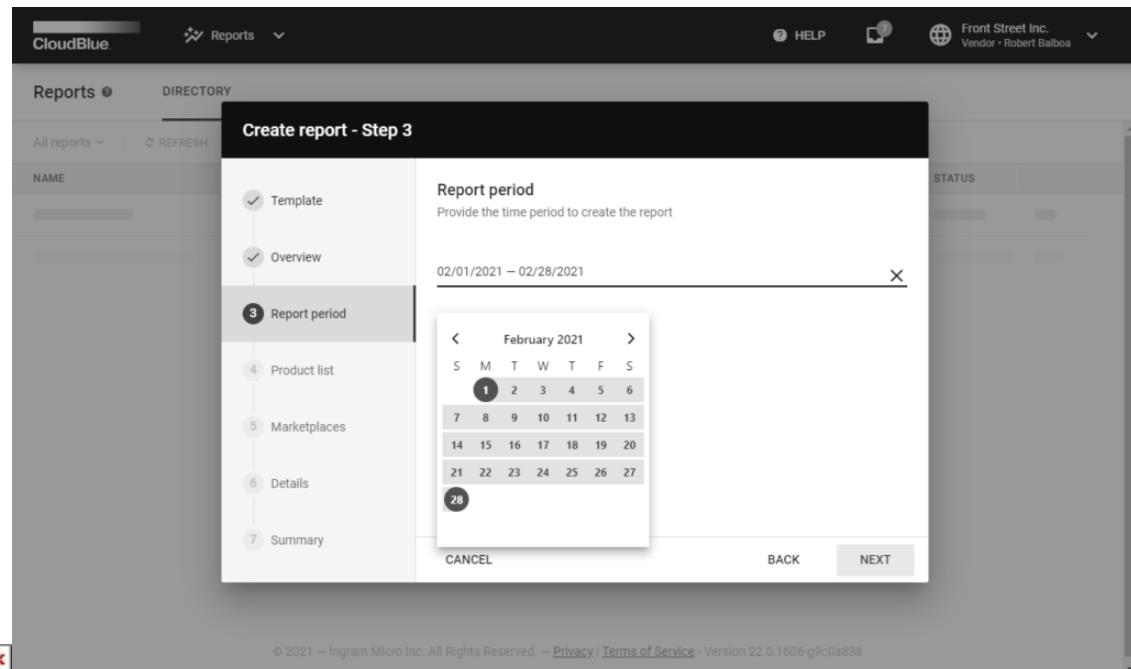
## Parameters

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.

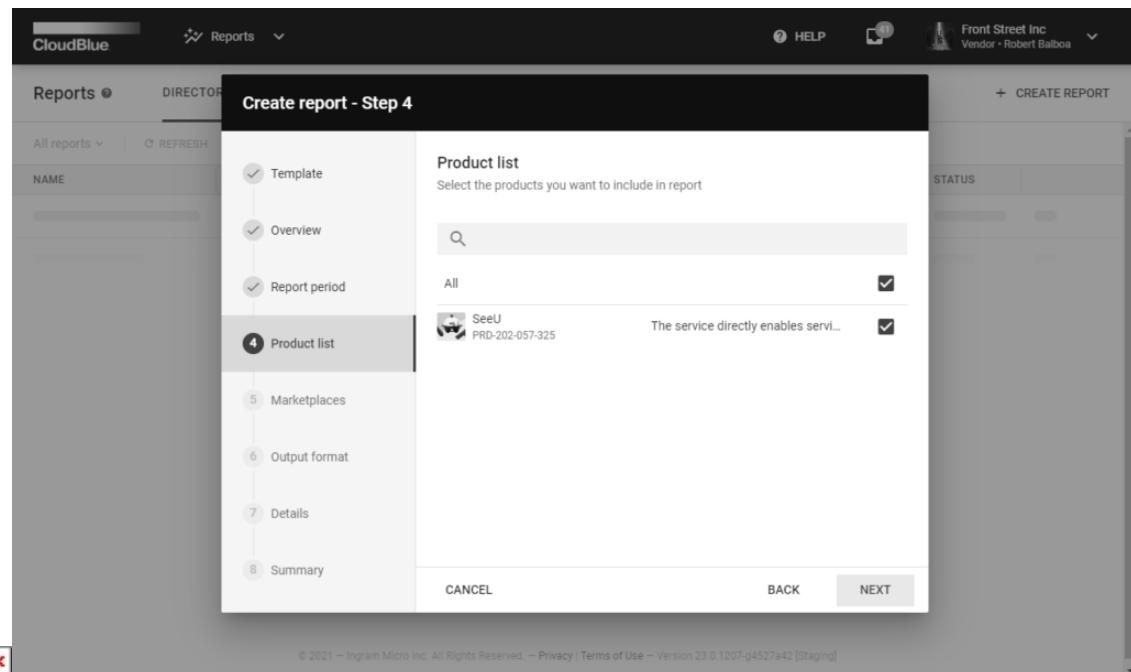
Choose the start date from the calendar by clicking on it. Thereafter, specify the end date by clicking on the calendar once again.



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

### Product list

Specify a product from the following product list.



CloudBlue Reports DIRECTOR

Create report - Step 4

NAME

Template

Overview

Report period

Product list

Marketplaces

Output format

Details

Summary

Product list

Select the products you want to include in report

All

SeeU  
PRD-202-057-325

The service directly enables serv...

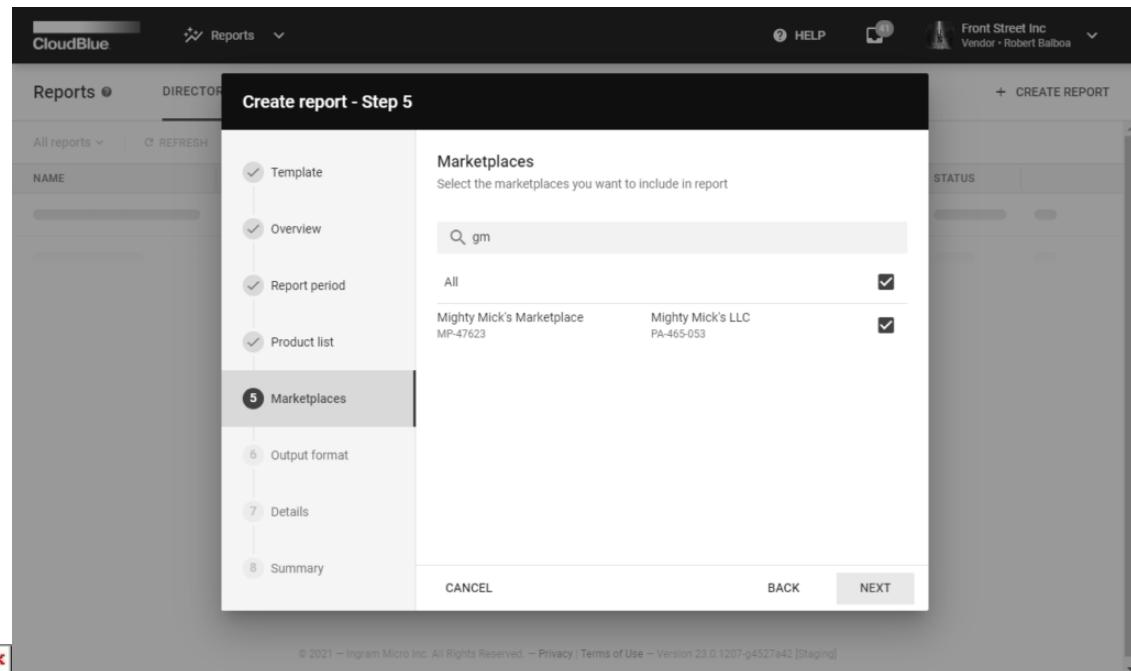
CANCEL BACK NEXT

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

## Marketplace

Select a marketplace from the following list.



CloudBlue Reports DIRECTOR

Create report - Step 5

NAME

Template

Overview

Report period

Product list

Marketplaces

Output format

Details

Summary

Marketplaces

Select the marketplaces you want to include in report

All

Mighty Mick's Marketplace  
MP-47623

Mighty Mick's LLC  
PA-465-053

CANCEL BACK NEXT

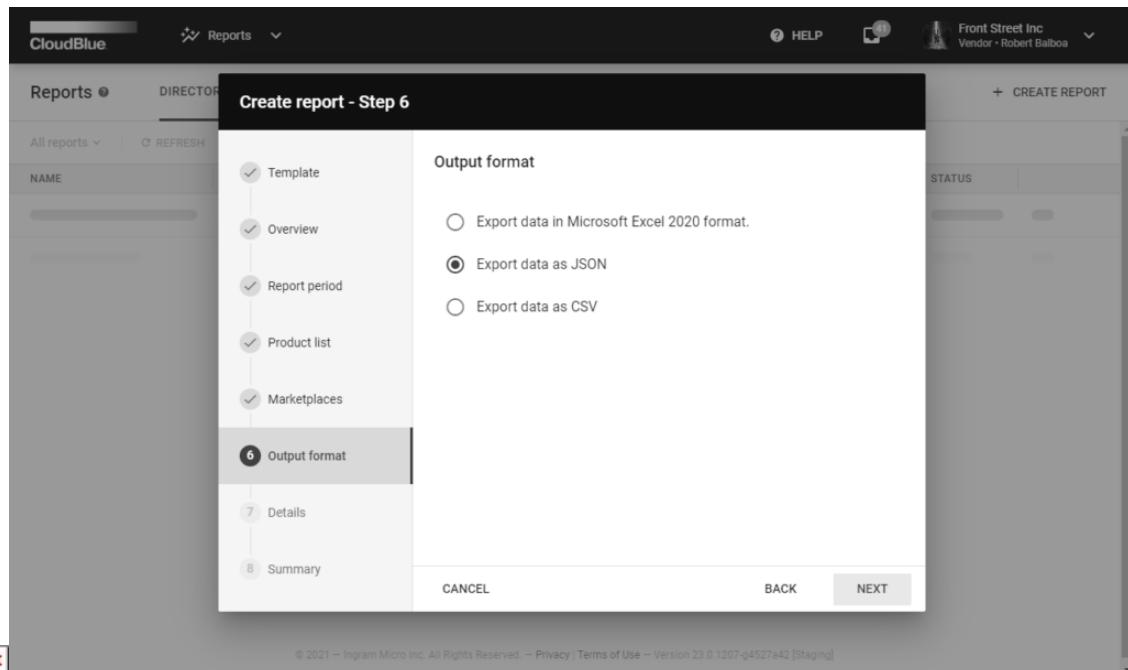
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If you want to select all available marketplaces, check the corresponding checkbox.



## 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.

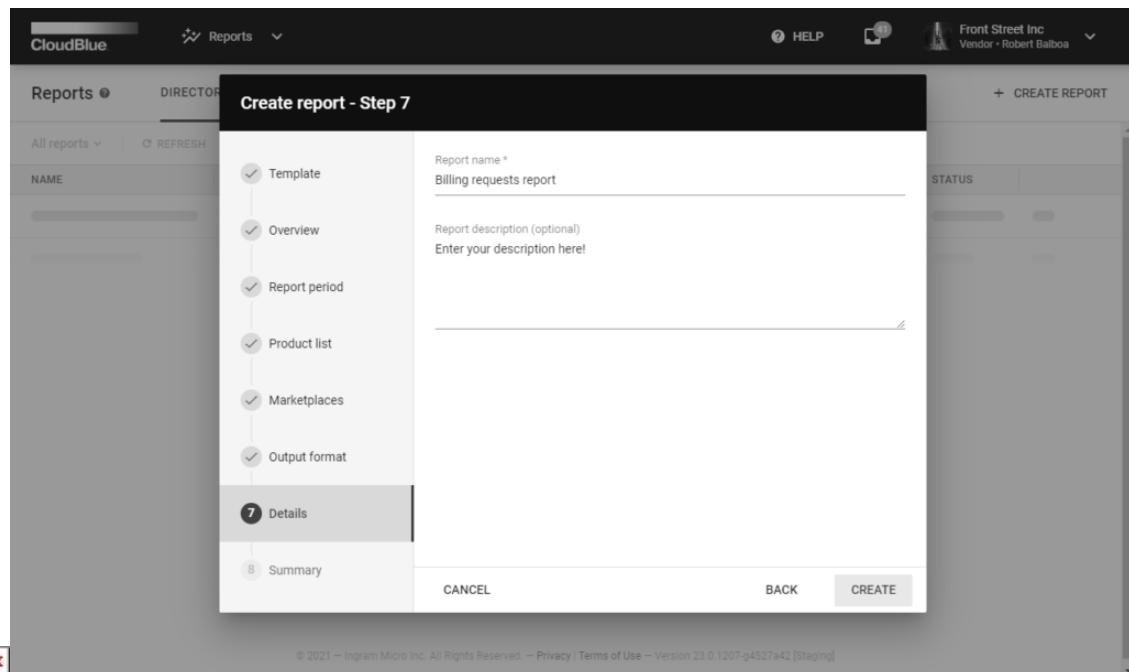


Click **Next** to continue.

## Details

Specify the following report details:

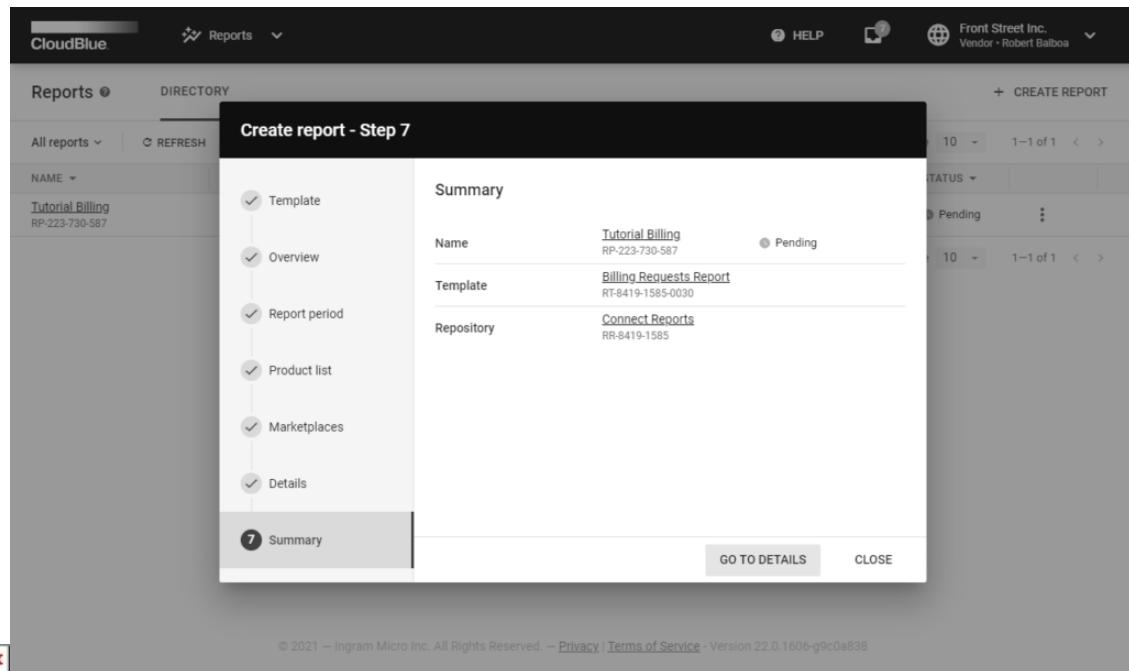
- **Report name:** Enter your report name in this field.
- **Report description:** Provide a description for your report (optional)



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

## Summary

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

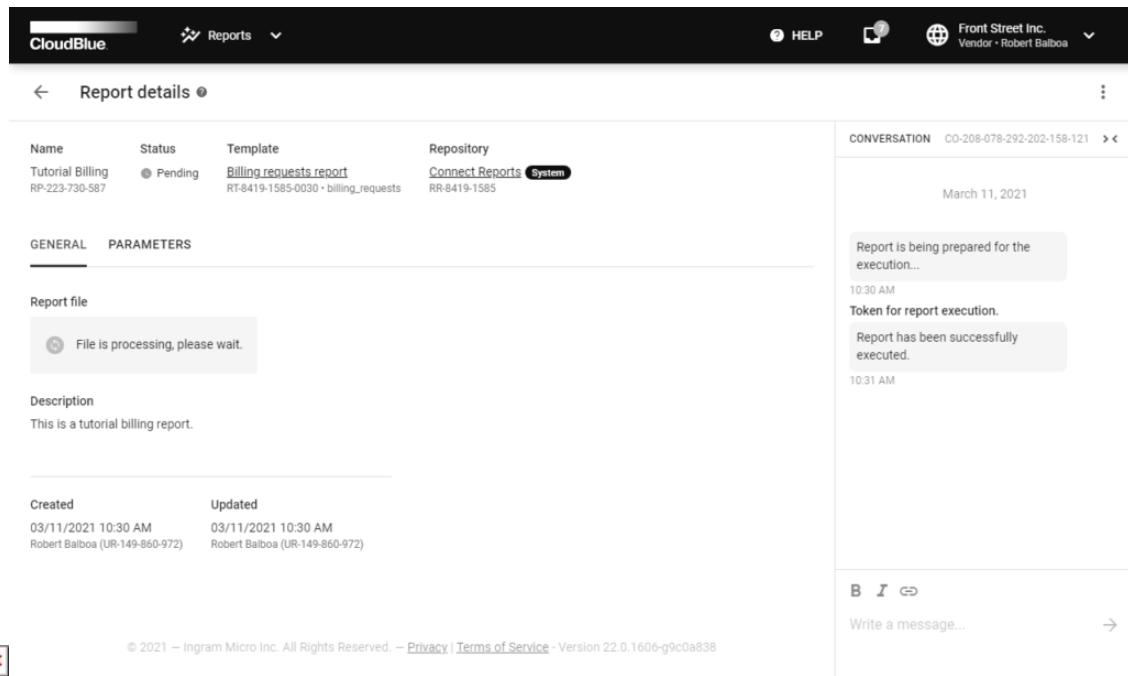


Review the summary and click **Go to Details** to access the Report details screen. Otherwise, click **Close** and return to the Reports module.



## Report Details

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



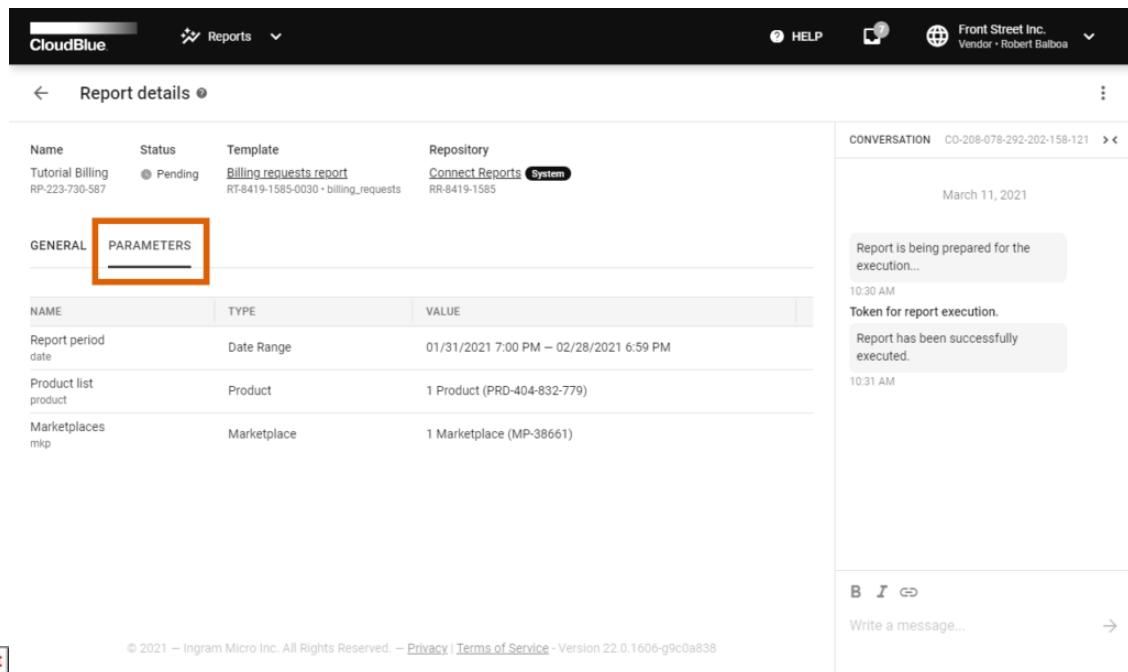
The screenshot shows the 'Report details' screen for a report named 'Tutorial Billing'. The report is in a 'Pending' status, using the 'Billing requests report' template from the 'Connect Reports' repository. The 'System' tab is selected. The 'Report file' section shows a message: 'File is processing, please wait.' The 'Description' section contains the text: 'This is a tutorial billing report.' The 'Created' and 'Updated' fields show the same timestamp: '03/11/2021 10:30 AM' by 'Robert Balboa (UR-149-860-972)'. The 'Conversation' section shows a message history: 'Report is being prepared for the execution...' at 10:30 AM, 'Token for report execution.' at 10:31 AM, and 'Report has been successfully executed.' at 10:31 AM. The bottom of the screen includes a footer with copyright information and a message input field.

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.



Report details

Name	Status	Template	Repository
Tutorial Billing	Pending	Billing requests report RT-8419-1585-0030 - billing_requests	Connect Reports System RR-8419-1585

GENERAL 

NAME	TYPE	VALUE
Report period date	Date Range	01/31/2021 7:00 PM – 02/28/2021 6:59 PM
Product list product	Product	1 Product (PRD-404-832-779)
Marketplaces mfp	Marketplace	1 Marketplace (MP-38661)

CONVERSATION CO-208-078-292-202-158-121 

March 11, 2021

Report is being prepared for the execution...  
10:30 AM  
Token for report execution.  
Report has been successfully executed.  
10:31 AM

B  

Write a message... 

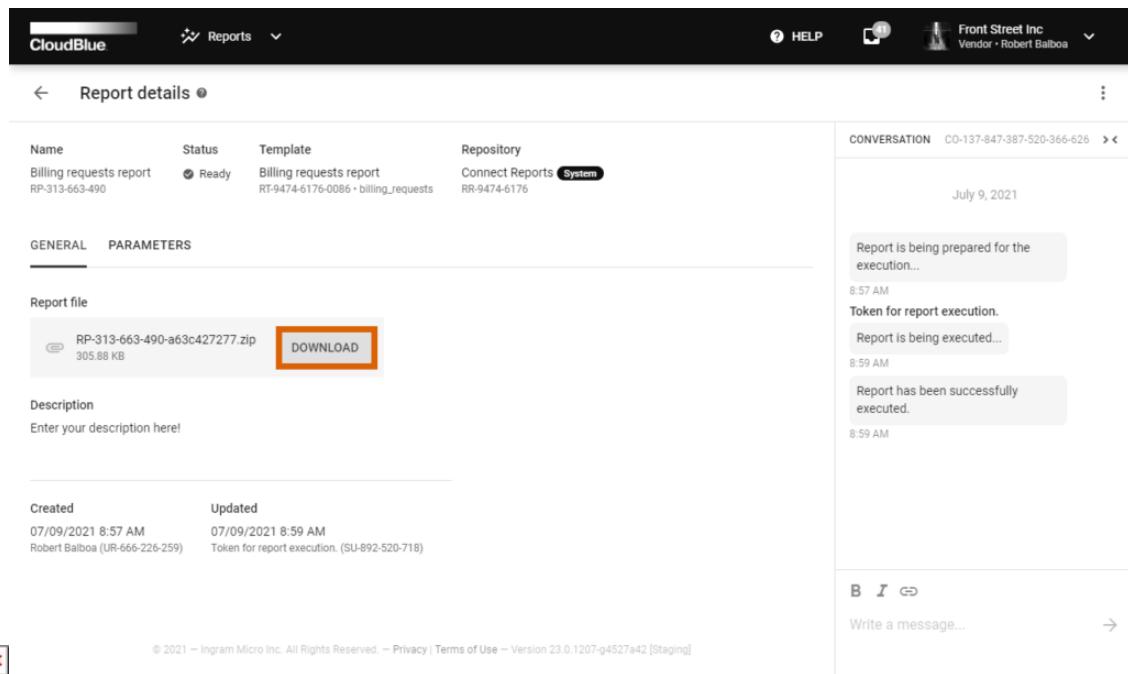
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Note that provided parameters vary depending on the selected report template.

## 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 details

Name	Status	Template	Repository
Billing requests report	Ready	Billing requests report RT-9474-6176-0086 - billing_requests	Connect Reports System RR-9474-6176

GENERAL 

Report file

 RP-313-663-490-a63c427277.zip 

Description  
Enter your description here!

Created Updated  
07/09/2021 8:57 AM 07/09/2021 8:59 AM  
Robert Balboa (UR-666-226-259) Token for report execution. (SU-892-520-718)

CONVERSATION CO-137-847-387-520-366-626 

July 9, 2021

Report is being prepared for the execution...  
8:57 AM  
Token for report execution.  
Report is being executed...  
8:59 AM  
Report has been successfully executed.  
8:59 AM

B  

Write a message... 

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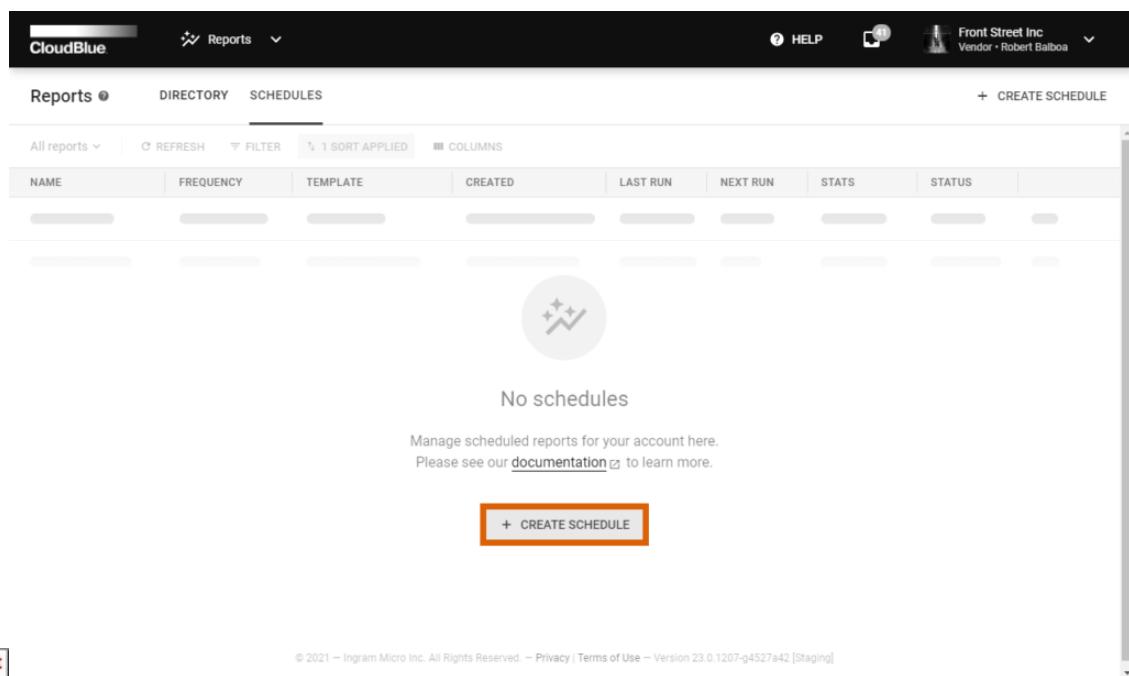


Once your report file is downloaded successfully, you can delete the report object by clicking on the vertical ellipsis icon and selecting the *Delete* option. Note, however, that your deleted report objects cannot be restored.

## 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.



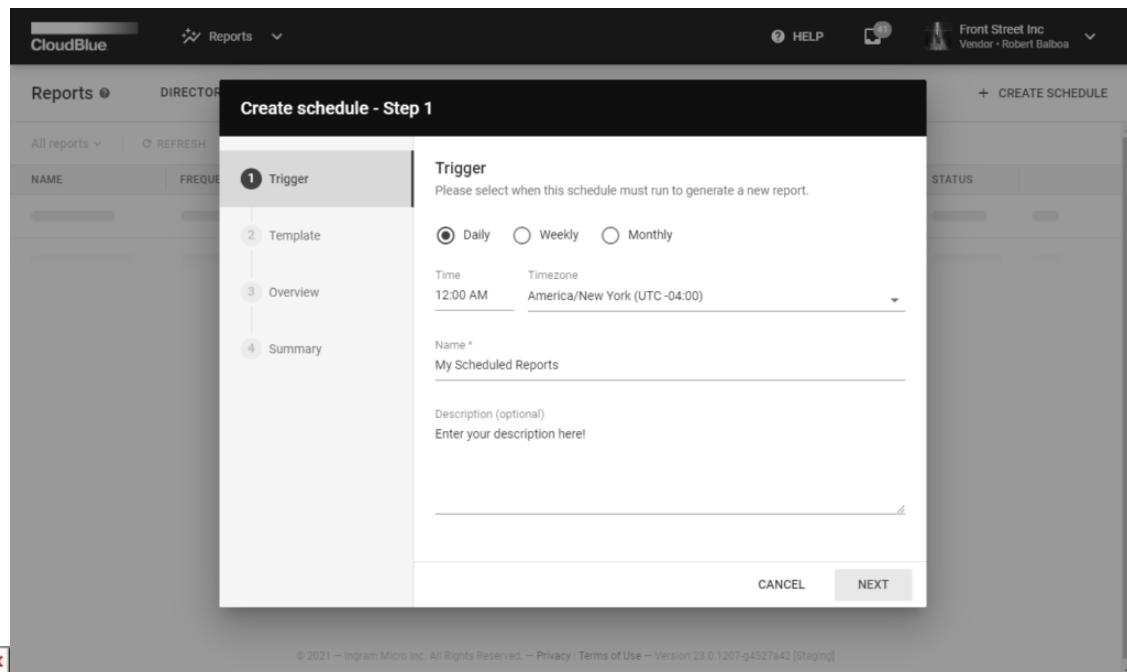
The screenshot shows the CloudBlue Connect interface for managing scheduled reports. The top navigation bar includes 'CloudBlue', 'Reports' (with a dropdown), 'HELP', a user icon, and 'Front Street Inc Vendor - Robert Balboa'. The main content area is titled 'SCHEDULES'. A table lists scheduled reports with columns: NAME, FREQUENCY, TEMPLATE, CREATED, LAST RUN, NEXT RUN, STATS, and STATUS. A large, central message says 'No schedules' with a plus icon. Below it, text reads 'Manage scheduled reports for your account here. Please see our [documentation](#) to learn more.' A prominent orange-bordered 'CREATE SCHEDULE' button is at the bottom.

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

## Trigger

Specify your schedule trigger configurations as follows:

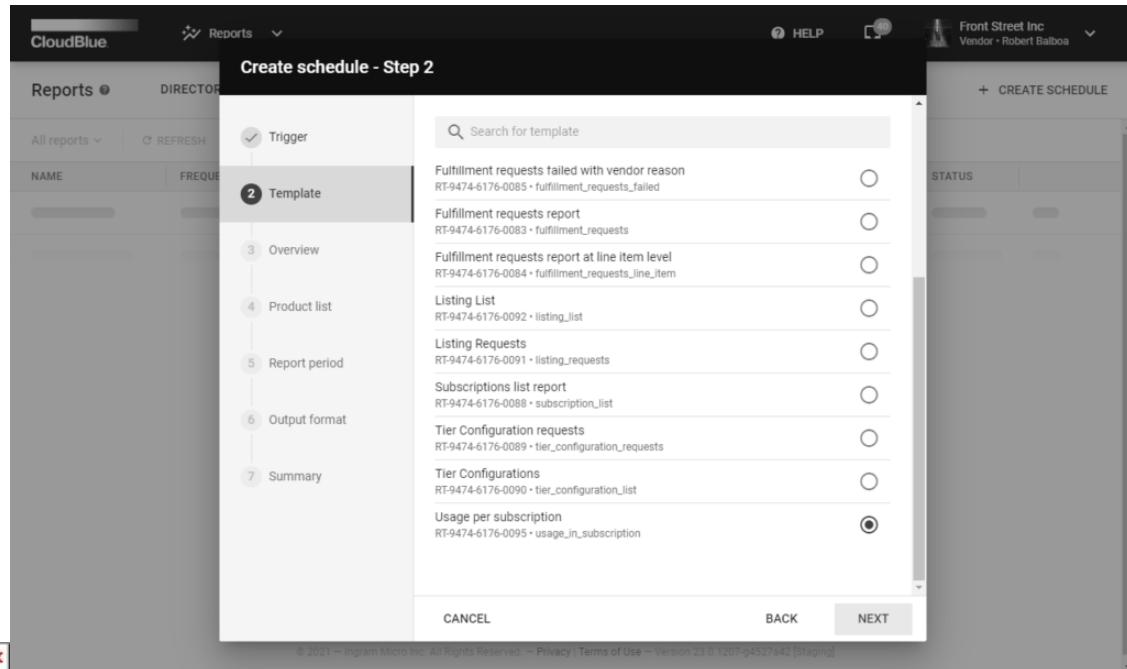
- **Daily/ Weekly/ Monthly:** The system can generate reports daily, weekly or once a month. Note that the following options vary depending on your selected schedule type.
- **Day of month/week:** Choose month day or week day by using this field.
- **Time:** Select your report file creation time.
- **Timezone:** 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.

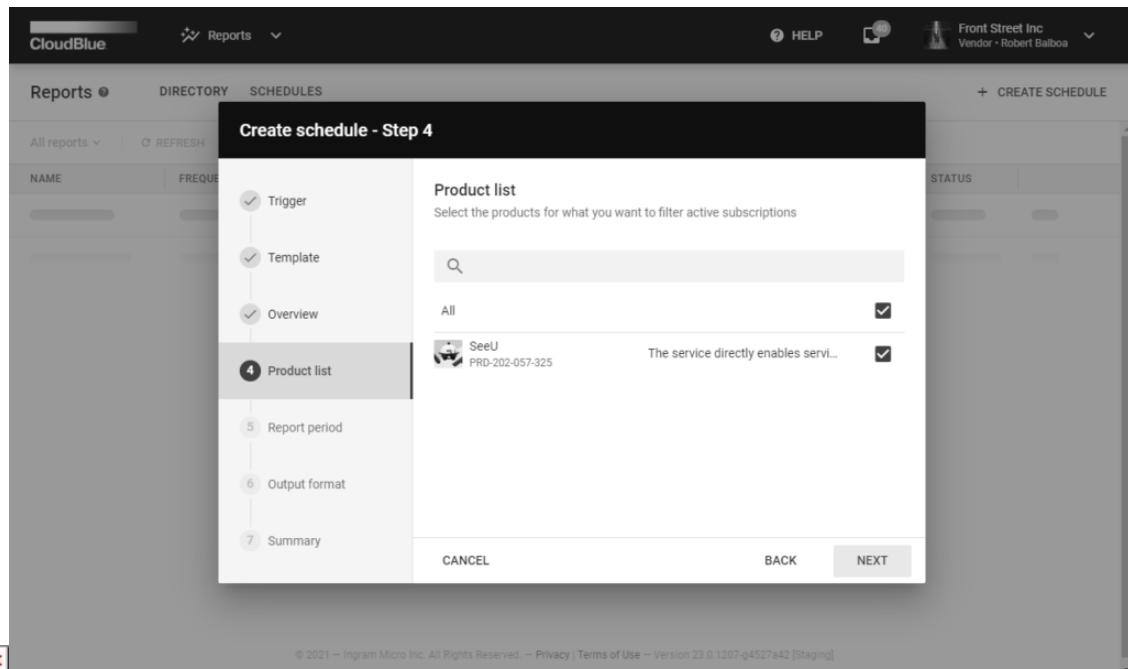


Get familiar with the template overview and continue with report parameters configuration.



## Product List

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

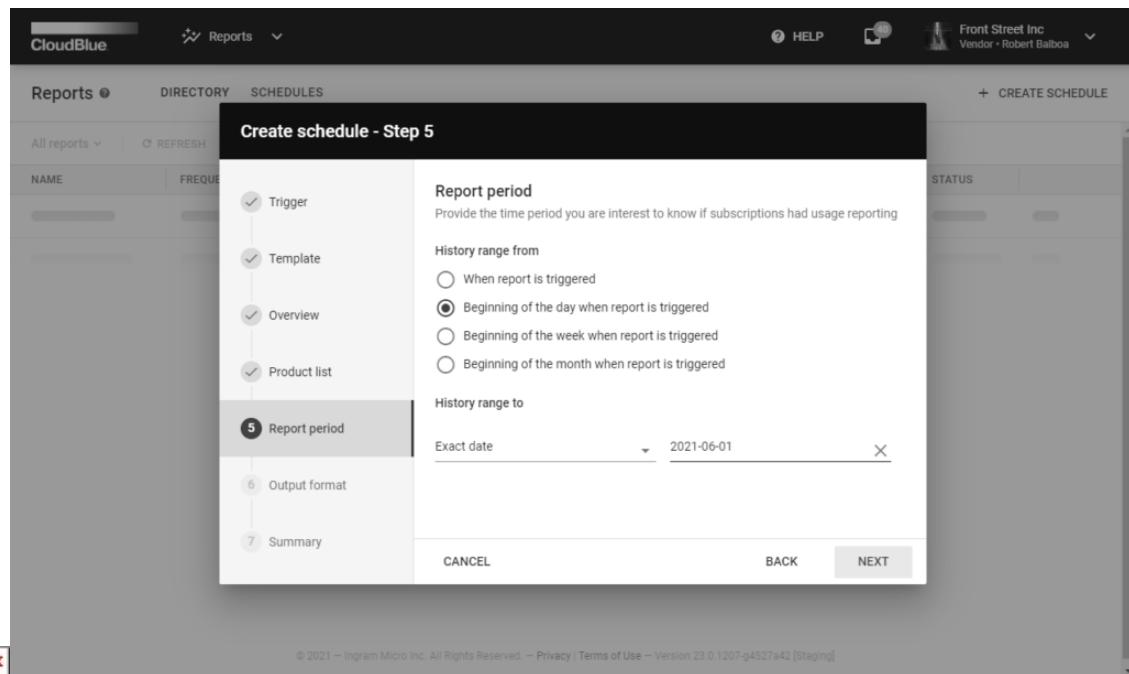


Note that you can select several products or select all of your products by checking the corresponding checkbox.

## Report period

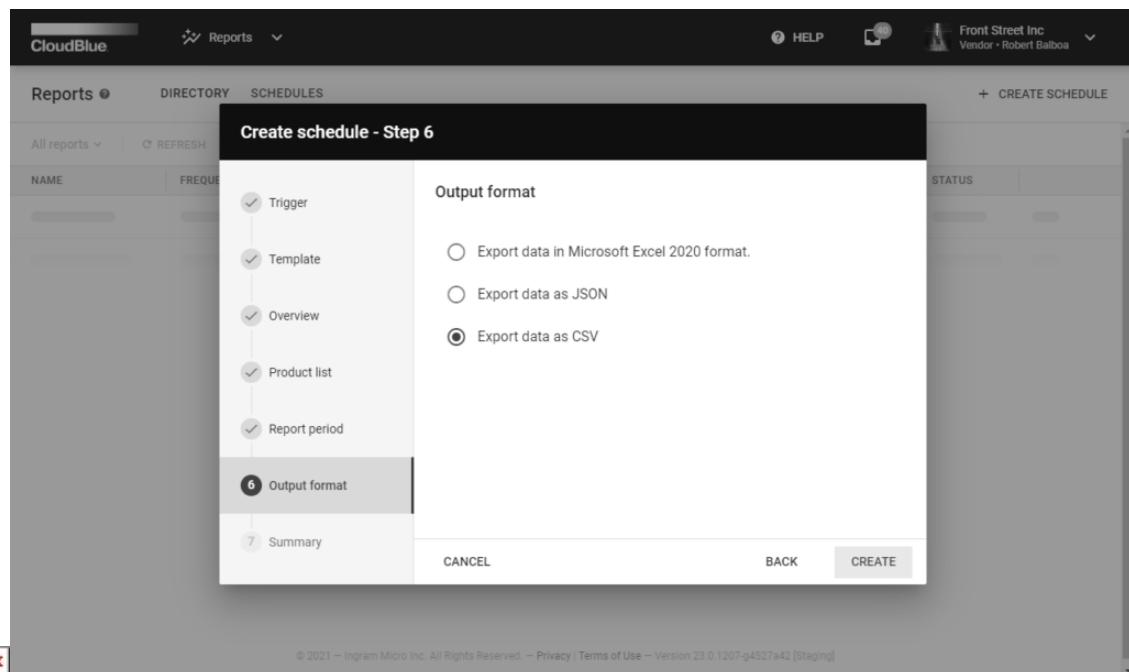
Fill out the report period form as follows:

- **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.

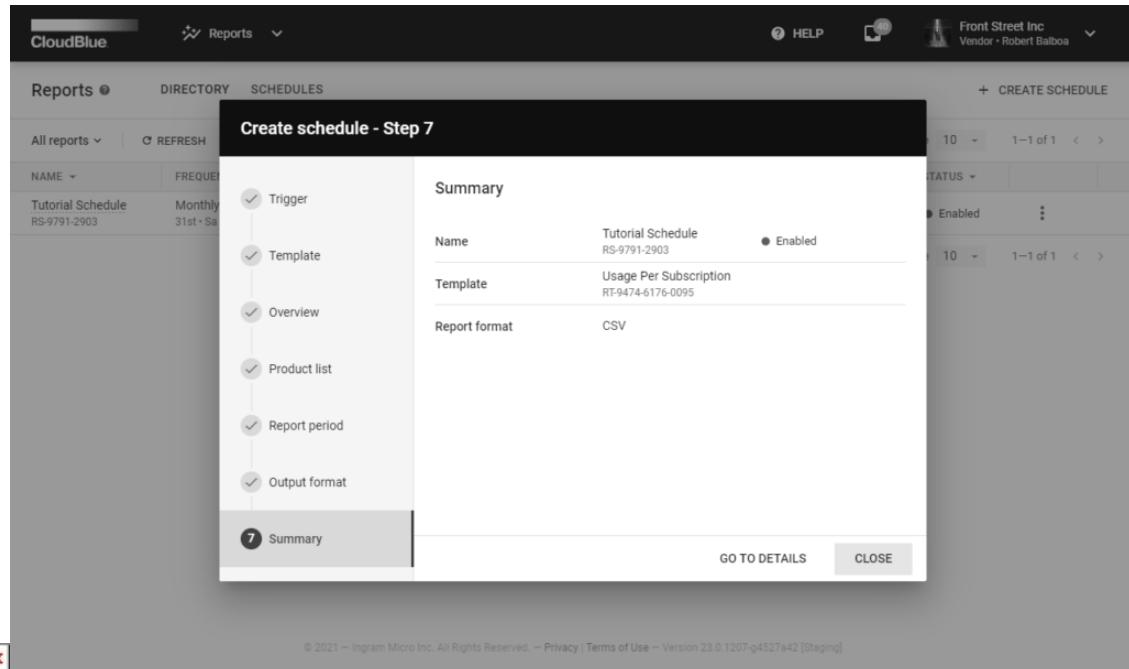


In this case, system allow changing your output format from the *Schedule Details* screen.



## Summary

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



The screenshot shows a 'Create schedule - Step 7' dialog box. The 'Summary' tab is selected. The dialog displays the following information:

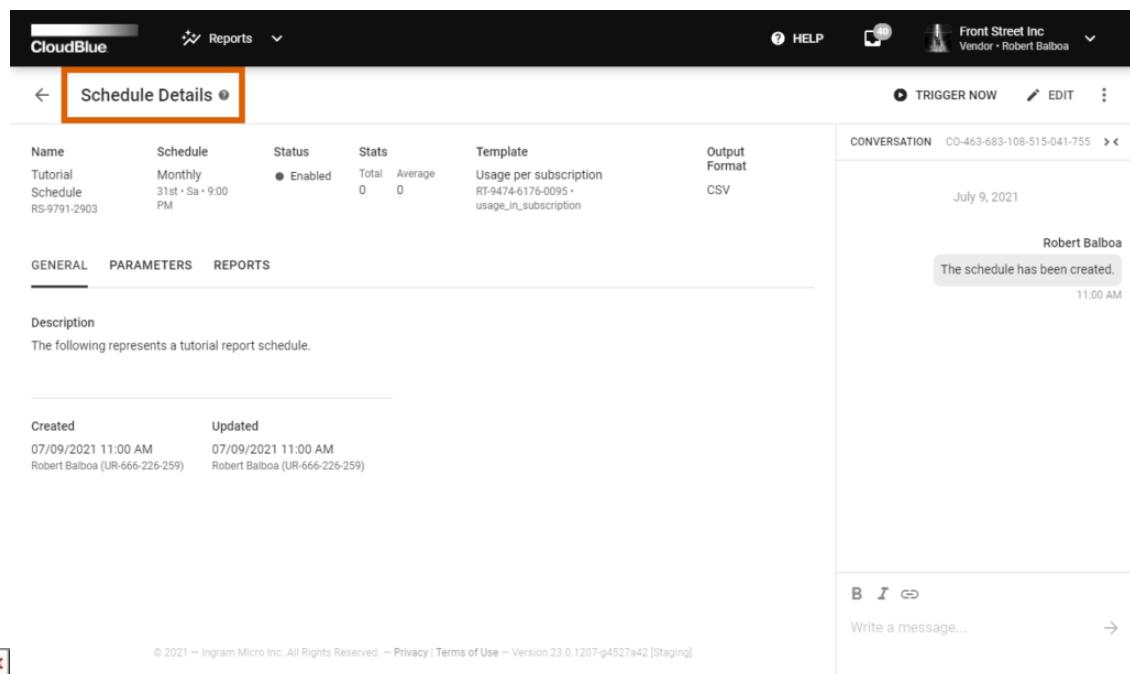
- Name:** Tutorial Schedule (RS-9791-2903)
- Status:** Enabled
- Template:** Usage Per Subscription (RT-9474-6176-0095)
- Report format:** CSV

On the left, a sidebar lists report categories: NAME, FREQU, Trigger, Template, Overview, Product list, Report period, Output format, and Summary. The 'Summary' category is selected. The background shows a list of reports and a 'Reports' sidebar.

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 schedule name from the Schedules tab to access the **Schedule Details** screen.



**Schedule Details**

Name	Schedule	Status	Stats	Template	Output Format	CONVERSATION
Tutorial Schedule	Monthly 31st • Sa • 9:00 PM	● Enabled	Total 0 Average 0	Usage per subscription RT-9474-6176-0095 • usage_in_subscription	CSV	CO-463-683-108-515-041-755

**GENERAL** **PARAMETERS** **REPORTS**

**Description**  
The following represents a tutorial report schedule.

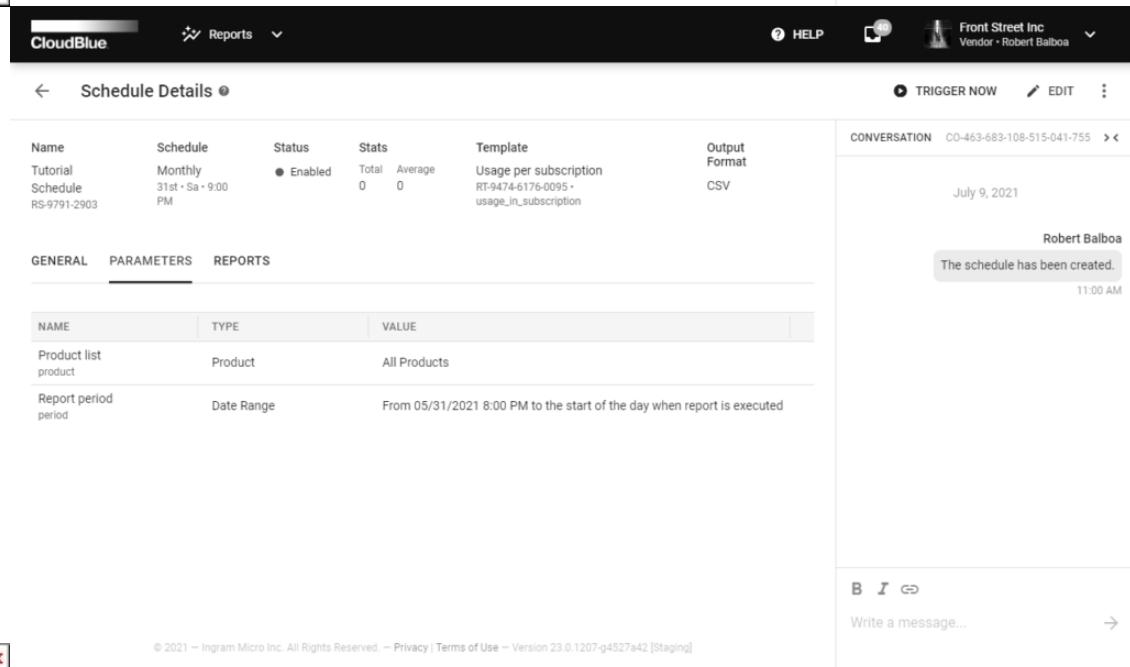
**Created** 07/09/2021 11:00 AM **Updated** 07/09/2021 11:00 AM  
Robert Balboa (UR-666-226-259) Robert Balboa (UR-666-226-259)

**CONVERSATION** CO-463-683-108-515-041-755   

July 9, 2021

Robert Balboa  
The schedule has been created.  
11:00 AM

**B** **I** **GO**  
Write a message... 



**Schedule Details**

Name	Schedule	Status	Stats	Template	Output Format	CONVERSATION
Tutorial Schedule	Monthly 31st • Sa • 9:00 PM	● Enabled	Total 0 Average 0	Usage per subscription RT-9474-6176-0095 • usage_in_subscription	CSV	CO-463-683-108-515-041-755

**GENERAL** **PARAMETERS** **REPORTS**

**NAME** **TYPE** **VALUE**

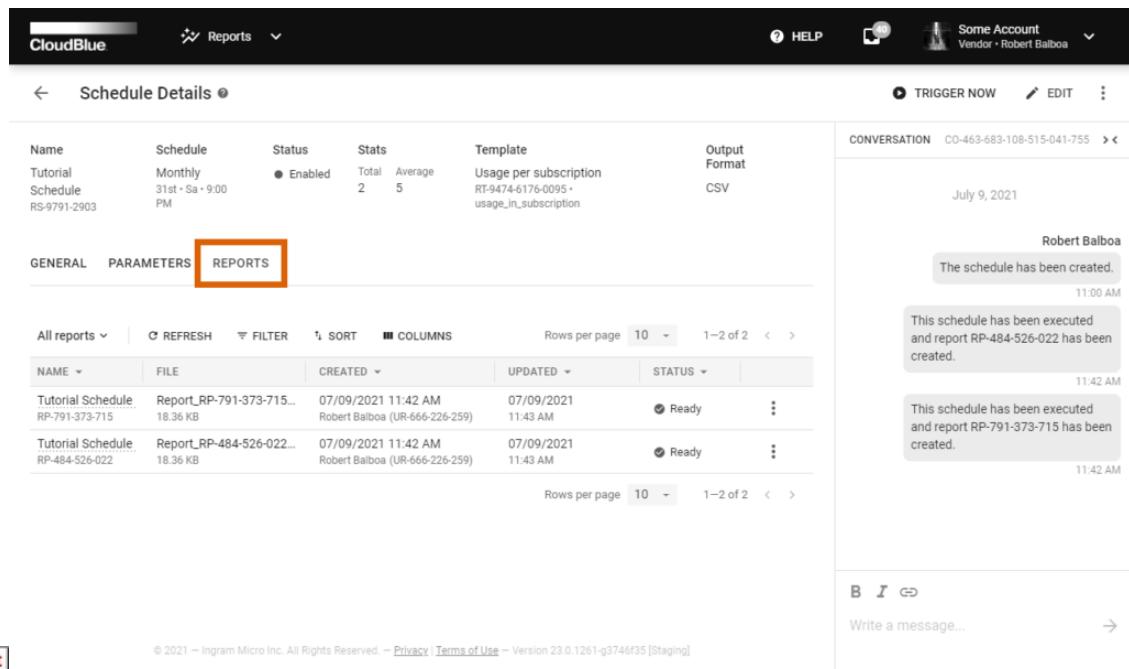
Product list product	Product	All Products
Report period period	Date Range	From 05/31/2021 8:00 PM to the start of the day when report is executed

**CONVERSATION** CO-463-683-108-515-041-755  

July 9, 2021

Robert Balboa  
The schedule has been created.  
11:00 AM

**B** **I** **GO**  
Write a message... 



The screenshot shows the CloudBlue Reports interface. At the top, there are tabs for 'CloudBlue', 'Reports', 'HELP', and 'Some Account'. The 'Reports' tab is active. Below the tabs, the title is 'Schedule Details'. The main content area shows a table with the following data:

Name	Schedule	Status	Stats	Template	Output Format
Tutorial Schedule RS-9791-2903	Monthly 31st • Sa • 9:00 PM	● Enabled	Total 2 Average 5	Usage per subscription RT-9474-6176-0095 • usage_in_subscription	CSV

Below the table, there are three tabs: 'GENERAL', 'PARAMETERS', and 'REPORTS'. The 'REPORTS' tab is selected and highlighted with a red box. To the right of the table, there is a 'CONVERSATION' sidebar. It shows a message from 'Robert Balboa' at 11:00 AM: 'The schedule has been created.' Below that, another message from 'Robert Balboa' at 11:42 AM: 'This schedule has been executed and report RP-484-526-022 has been created.' At the bottom of the sidebar, another message from 'Robert Balboa' at 11:42 AM: 'This schedule has been executed and report RP-791-373-715 has been created.' The conversation sidebar also includes a message input field with placeholder text 'Write a message...' and a send button with a right-pointing arrow.

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 top-right 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.