

[Documentation](#) → [Modules](#) → [Usage](#) →

Usage - Distributor & Reseller Portals

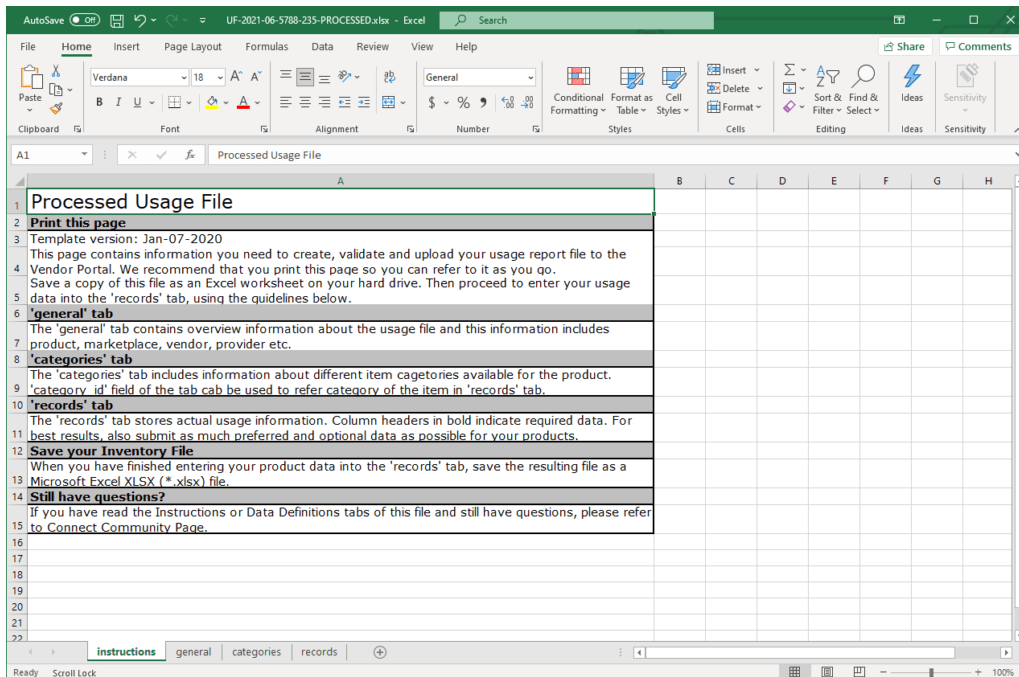
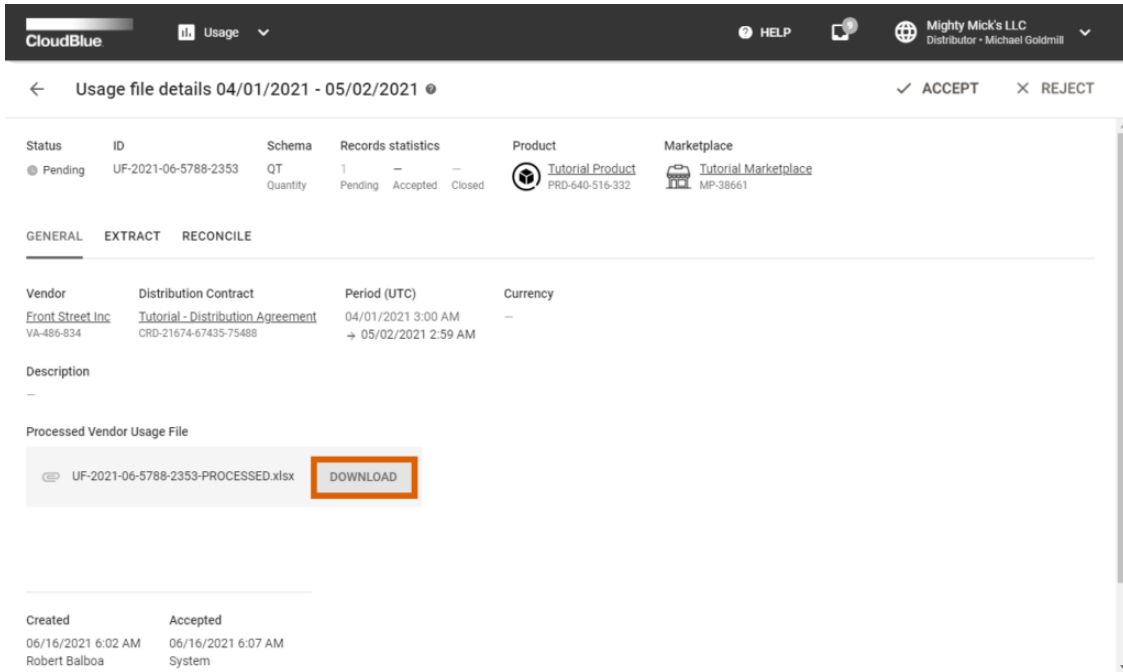


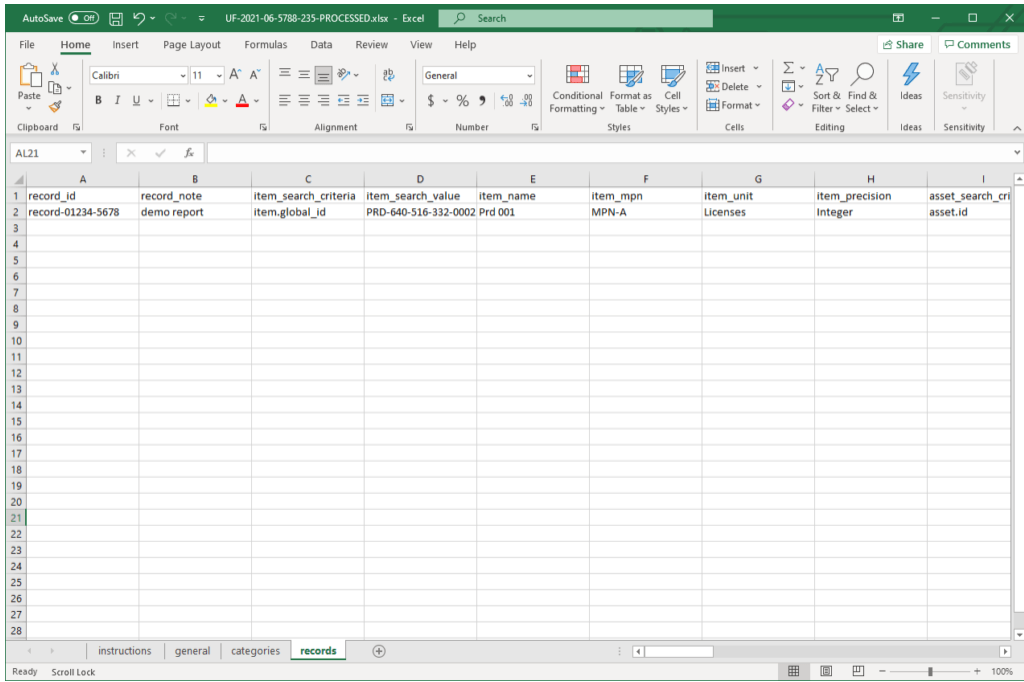
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Auto-generated at March 29, 2023

Reviewing Usage Files

Once Vendors successfully submit their usage record, Distributors and Resellers can get the spreadsheet file and examine it via the **Usage** module on the CloudBlue Connect platform. Access the *Usage File Details* screen and click the **Download** button under **Processed Vendor Usage File**:





The provided usage report file represent a spreadsheet that contains multiple tabs:

- **instructions:** Provides usage report file overview.
- **general:** This tab contains general information, such as product, marketplace, vendor, etc.
- **categories:** Includes information about different item categories available for the product.
- **records:** This is the main tab that provides usage information.

General Tab

The following table introduces and describes attributes provided in the **general** tab:

#	Attribute	Definition	Example Value
1	report_name	Report name that is assigned by the system	04/01/2021 - 05/02/2021
2	report_note	Report note that is assigned by Vendors	Demo report
3	report_id	Report identifier that is specified by Vendors	UF-2021-06-5788-2353
4	report_start_time_utc	Usage report start date	10/20/19 0:00

#	Attribute	Definition	Example Value
5	report_end_time_utc	Usage report end date	11/20/19 0:00
6	usage_schema	Defines the specified reporting schema	TR, CR, PR or QT
8	currency	Specified currency (in the ISO 4217 format)	USD
9	product_id	Product identifier	PRD-123-123-123
10	product_name	Product name	Tutorial Product
11	marketplace_id	Marketplace identifier	MP-00001
12	marketplace_name	Marketplace name	United States
13	hub_id	Hub identifier	HB-1234-1234
14	hub_name	Specified hub name	NA Production
15	vendor_account_id	Vendor account identifier	VA-123-123
16	vendor_account_name	Vendor account name	Front Street Inc
17	distributor_account_id	Distributor account identifier	PA-321-321
18	distributor_account_name	Distributor account name	Mighty Mick's LLC
19	distribution_contract_id	Distribution contract identifier	CRD-21674-67435-75488
20	distribution_contract_name	Distribution contract name	Front Street Inc Agreement

Categories Tab

The following table demonstrates the categories tab and provides examples for each attribute:

category_id	category_name	category_description
compute	Computational Resources	All of your virtual machines and containers fall into this category.
storage	Persistence Services	All of your blob storages are accounted to this category.
db	Databases	All of various databases fall into this category

Note that category IDs, names and description are defined by Vendors.

Records Tab

Usage information that is included in the *record* tab reflects the record data that is specified by Vendors. However, the processed usage report file contain additional columns that are introduced and described in the following table:

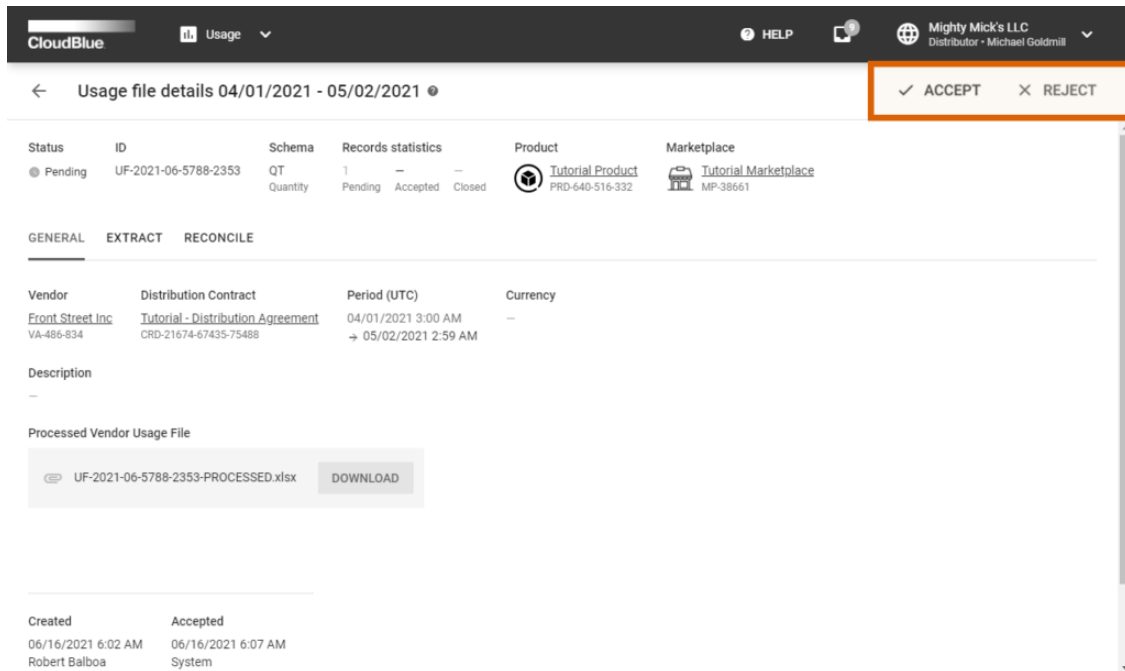
Column Header	Description
item_name	This column displays an item name that is provided by Vendors
item_type	Indicates the specified item type: <i>pay-as-you-go</i> or <i>reservation</i>
item_unit	Displays the specified item unit (e.g., <i>licenses</i>)
item_period	Indicates the item billing period value such as <i>one time</i> , <i>monthly</i> , or <i>yearly</i> ; note that this is value does not represent the commitment period
asset_id	Unique subscription identifier that is assigned by the Connect platform
asset_external_id	External subscription identifier that is assigned by the commerce system, this can help quickly identify the required subscription
customer_account_id	Customer account identifier on the commerce system
customer_company_name	Customer account name as defined on the last request sent by the commerce system

Accepting or Rejecting Files

Once Distributors or Resellers receive a usage report file from their Vendor, the system allows accepting or rejecting *pending*

usage reports by using corresponding buttons on the top-right corner of the *Usage File Details* screen:

- In case Distributors or Resellers *reject* the usage report file, the system prompts to provide a reason that will be shown to Vendors. For example, in case wrong time period is specified, Distributors can ask Vendors to fix that issue.
- Once Distributors or Resellers *accept* the usage report, it becomes available for propagation to the Distributor/ Reseller systems.



Note that the system can also accept your usage files automatically once you configure a usage rule as described below.

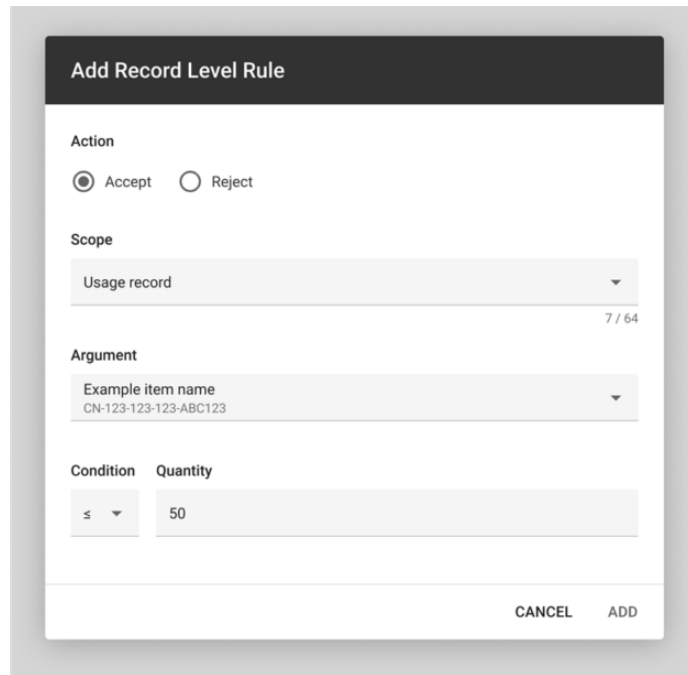
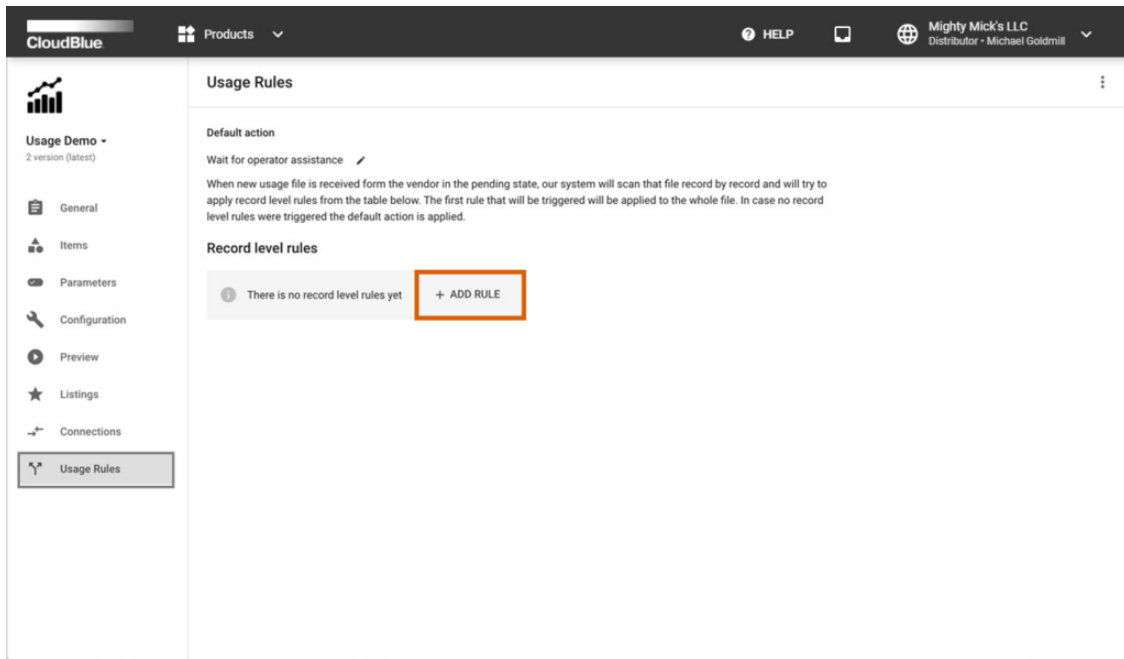
Usage Rules

In case Distributors or Resellers want to automate accept or reject operations on the Connect platform, the system allows creating *Usage Rules* for each product. Therefore, Connect can accept or reject *pending* usage report files automatically. This can drastically boost up and streamline the Usage Flow on the platform. Set up a new usage rule as described below.

Access the product profile page via the **Products** module and navigate to the **Usage Rules** section. Click the **Add Rule** button and configure the usage rule as follows:

- **Action:** Select *Accept* to automatically accept usage report files. The *Reject* option, as the name implies, is used to automatically reject the usage reports.
- **Scope:** Choose *Usage record* scope to automatically accept usage report files.
- **Argument:** Specify your argument in this field; e.g., select the required item.
- **Condition:** Enter condition to trigger your rule. For example, reported item quantity should be smaller or equal to your specified value.

Click the **Add** button to save your configuration and successfully add the acceptance automation rule.

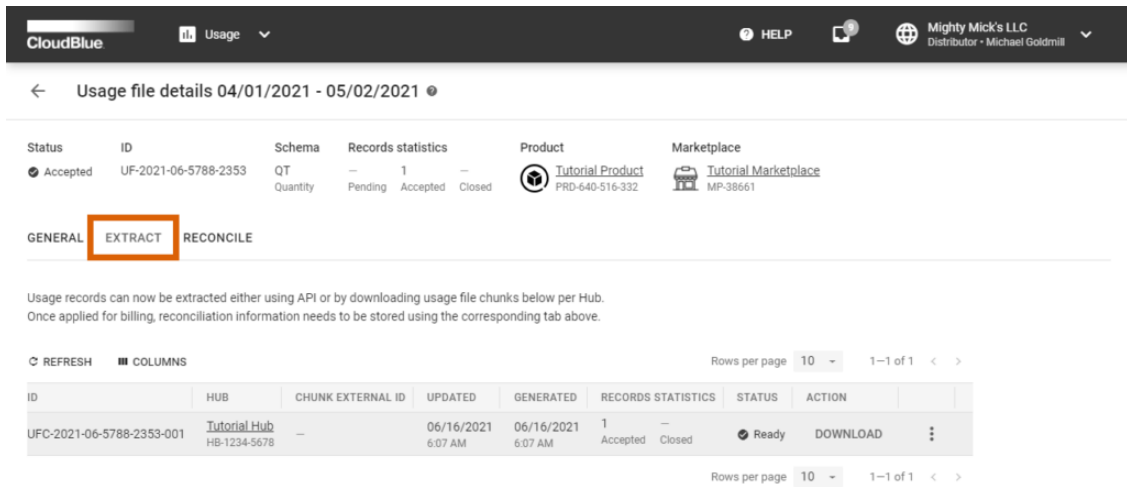


Note that it is possible to automate usage report acceptance by creating a custom script by using the Usage API.

Extracting Data

Once a usage report is assigned to the *Accepted* status, Distributors can extract usage data to their systems per a specified hub. Access the **Extract** section of the usage file details screen to download the spreadsheet file. Distributors can also edit the chunk

external ID or close the chunk by clicking on the vertical ellipsis (⋮) icon.



Usage file details 04/01/2021 - 05/02/2021

Status	ID	Schema	Records statistics	Product	Marketplace
Accepted	UF-2021-06-5788-2353	QT Quantity	1 Pending Accepted Closed	Tutorial Product PRD-640-516-332	Tutorial Marketplace MP-38661

GENERAL **EXTRACT** RECONCILE

Usage records can now be extracted either using API or by downloading usage file chunks below per Hub. Once applied for billing, reconciliation information needs to be stored using the corresponding tab above.

REFRESH COLUMNS Rows per page 10 1-1 of 1

ID	HUB	CHUNK EXTERNAL ID	UPDATED	GENERATED	RECORDS STATISTICS	STATUS	ACTION
UFC-2021-06-5788-2353-001	Tutorial Hub HB-1234-5678	-	06/16/2021 6:07 AM	06/16/2021 6:07 AM	1 Accepted Closed	Ready	DOWNLOAD

Rows per page 10 1-1 of 1

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For systems that are successfully integrated with the CloudBlue Connect platform, usage records are automatically extracted via record-level API calls or bulk file export.

Reconciling Data

In case all billing procedures are complete, the corresponding usage record file should be marked as *Closed* to signal the end of the reconciliation operation. This could be done either via the Usage API or by manually uploading reconciliation report to the Distributor/ Reseller Portal:

The reconciliation file structure should be similar to the extraction file structure. However, note that the reconciliation files should have 2 additional columns in the **records** tab:

- **external_billing_id**: Any string value that would allow to reference relevant billing object (invoice, order, etc.).
- **external_billing_note**: Any additional data that might be useful for the reconciliation.

record_id	record_note	start_time_utc	end_time_utc	item_id	item_name	item_mpn	item_unit	item_qty	item_pre	category_id	status	asset_id	asset_external_id	asset_external_u	asset_recon_id	quantity	external_billing_id	external_billing_note
1	record may18 2.18pm 7	note 7	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00736.0			billing_id_001	billing_note_001	
2	record may18 2.18pm 10	note 10	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00737.0			billing_id_002	billing_note_002	
3	record may18 2.18pm 6	note 6	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00738.0			billing_id_003	billing_note_003	
4	record may18 2.18pm 27	note 27	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00739.0			billing_id_004	billing_note_004	
5	record may18 2.18pm 9	note 9	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00740.0			billing_id_005	billing_note_005	
6	record may18 2.18pm 5	note 5	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00741.0			billing_id_006	billing_note_006	
7	record may18 2.18pm 19	note 19	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00742.0			billing_id_007	billing_note_007	
8	record may18 2.18pm 29	note 29	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00743.0			billing_id_008	billing_note_008	
9	record may18 2.18pm 11	note 11	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00744.0			billing_id_009	billing_note_009	
10	record may18 2.18pm 24	note 24	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00745.0			billing_id_010	billing_note_010	
11	record may18 2.18pm 13	note 13	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00746.0			billing_id_011	billing_note_011	
12	record may18 2.18pm 26	note 26	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00747.0			billing_id_012	billing_note_012	
13	record may18 2.18pm 28	note 28	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00748.0			billing_id_013	billing_note_013	
14	record may18 2.18pm 21	note 21	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00749.0			billing_id_014	billing_note_014	
15	record may18 2.18pm 4	note 4	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00750.0			billing_id_015	billing_note_015	
16	record may18 2.18pm 1	note 1	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00751.0			billing_id_016	billing_note_016	
17	record may18 2.18pm 22	note 22	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00752.0			billing_id_017	billing_note_017	
18	record may18 2.18pm 23	note 23	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00753.0			billing_id_018	billing_note_018	
19	record may18 2.18pm 18	note 18	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00754.0			billing_id_019	billing_note_019	
20	record may18 2.18pm 15	note 15	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00755.0			billing_id_020	billing_note_020	
21	record may18 2.18pm 8	note 8	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00756.0			billing_id_021	billing_note_021	
22	record may18 2.18pm 12	note 12	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00757.0			billing_id_022	billing_note_022	
23	record may18 2.18pm 14	note 14	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00758.0			billing_id_023	billing_note_023	
24	record may18 2.18pm 20	note 20	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00759.0			billing_id_024	billing_note_024	
25	record may18 2.18pm 17	note 17	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00760.0			billing_id_025	billing_note_025	
26	record may18 2.18pm 3	note 3	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00761.0			billing_id_026	billing_note_026	
27	record may18 2.18pm 25	note 25	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00762.0			billing_id_027	billing_note_027	
28	record may18 2.18pm 15	note 15	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00763.0			billing_id_028	billing_note_028	
29	record may18 2.18pm 2	note 2	2020-04-02 00:00:00	PRD-772-755-1C	PPU Item 1 MPN Unit	PPU	Decimal	default	approved	AS-4310-4841-0	A00000000001	S0E5D03-0060-4259-ACM	A00764.0			billing_id_029	billing_note_029	



Close Chunks via Extract Tab

Note that the system also allows specifying *external billing identifier* and *external billing note* for all provided records by clicking the vertical ellipsis (⋮) icon next to your selected usage file in the **Extract** tab.



Once your reconciliation file is successfully uploaded and processed, the usage instance will be automatically marked as *Closed*. Note that the system also displays your closed records under **Records statistics**.

The screenshot shows the 'Usage file details' page for the period 04/01/2021 - 05/02/2021. The 'Records statistics' section shows 29 Closed records. Below, the 'Operations' table lists a single record that was successfully processed.

#	ID	UPLOADED BY	UPLOADED AT	UPLOADED FILE	UPLOADED NOTE	HUB	PROCESSED FILE	PROCESSING NOTE	STATUS
1	RCF-2021-06-5788-2353-001	Michael Goldmill UR-149-860-972	06/18/2021 5:47 AM	DOWNLOAD	—	None HB-0000-0000	DOWNLOAD	Processing successful!	Processed