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Documentation Modules Usage

Usage – Distributor & Reseller Portals

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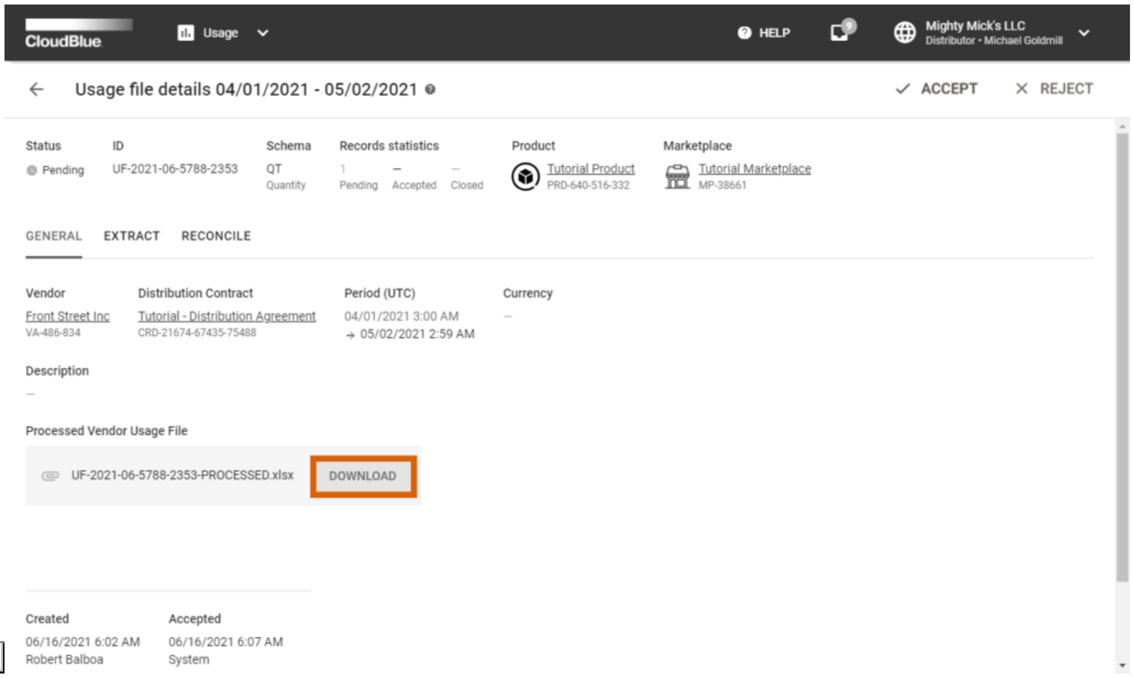
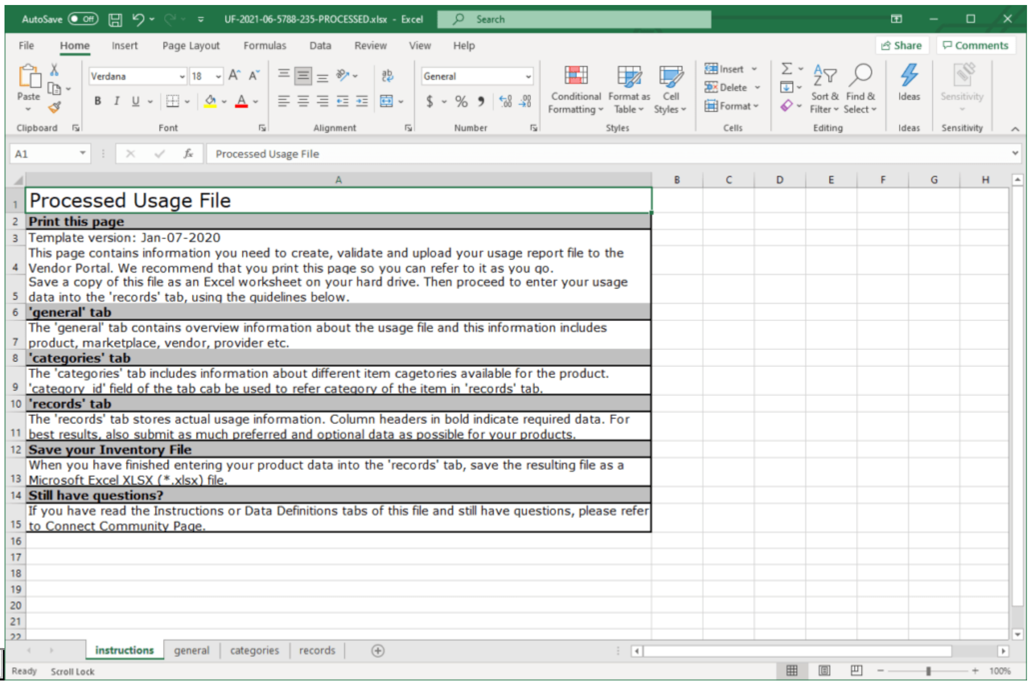
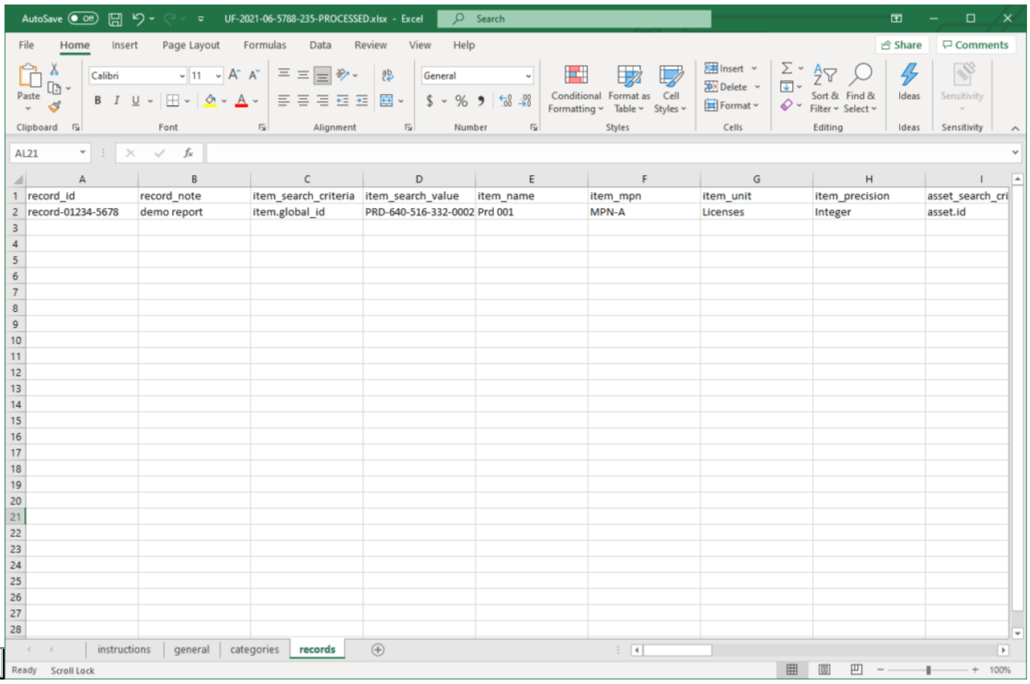
Auto-generated at July 4, 2026

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	Persistance 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

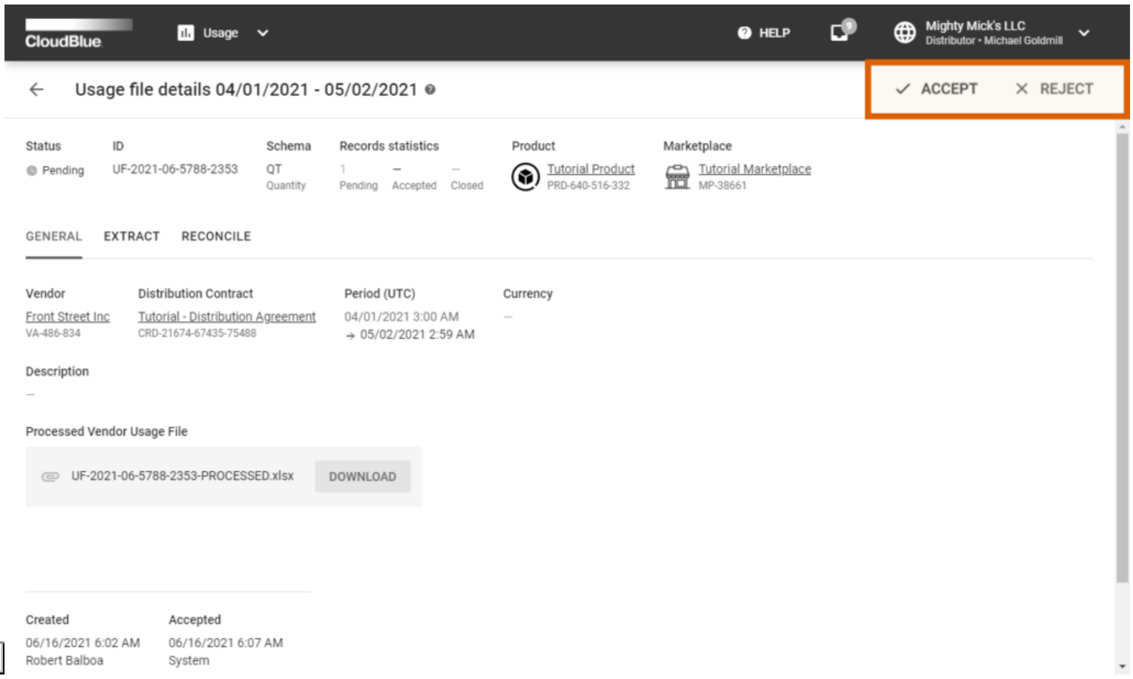
Usage information that is included in the *record* tab reflects the record data that is specified by Vendors. However, the processed usage report file contain additional columns that are introduced and described in the following table:

Column Header	Description
item_name	This column displays an item name that is provided by Vendors
item_type	Indicates the specified item type: *pay-as-you-go* or *reservation*
item_unit	Displays the specified item unit (e.g., *licenses*)
item_period	Indicates the item billing period value such as *one time*, *monthly*, or *yearly*; 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.

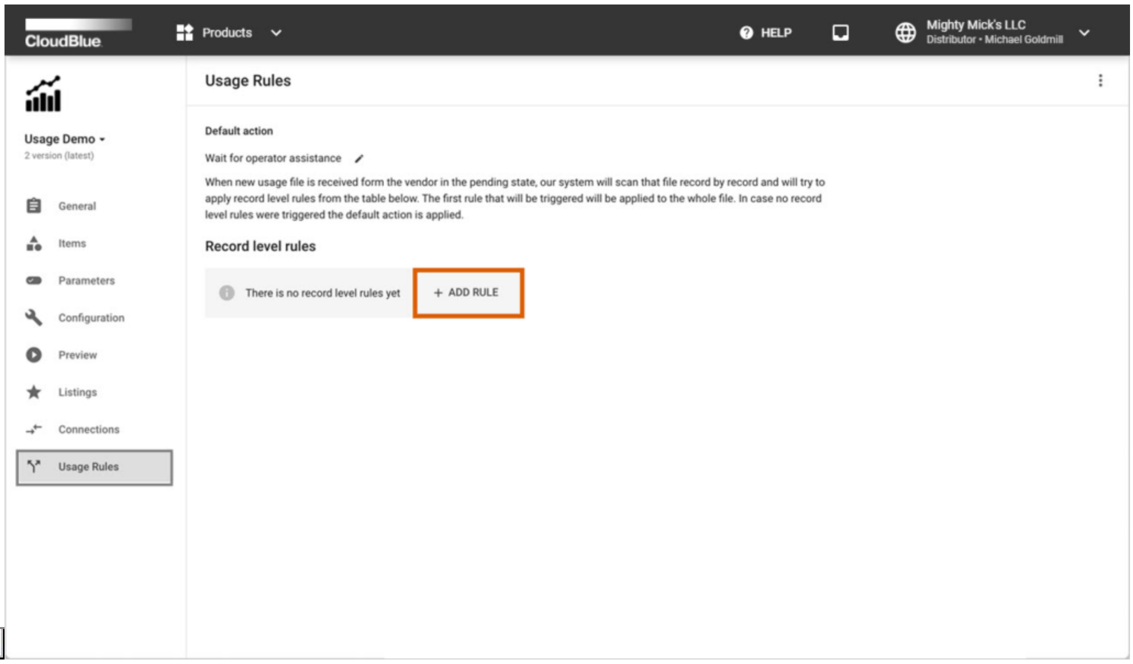
Usage Rules

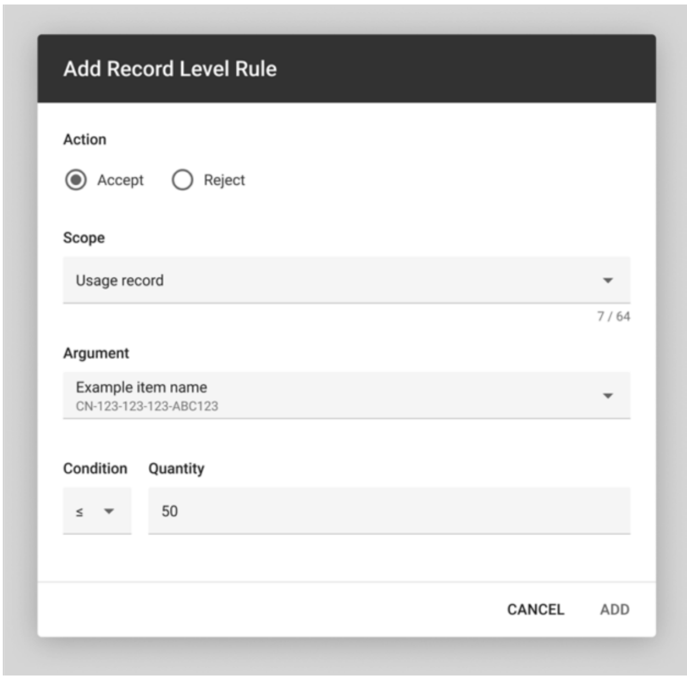
In case Distributors or Resellers want to automate accept or reject operations on the Connect platform, the system allows creating *Usage Rules* for each product. Therefore, Connect can accept or reject *pending* usage report files automatically. This can drastically boost up and streamline the Usage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

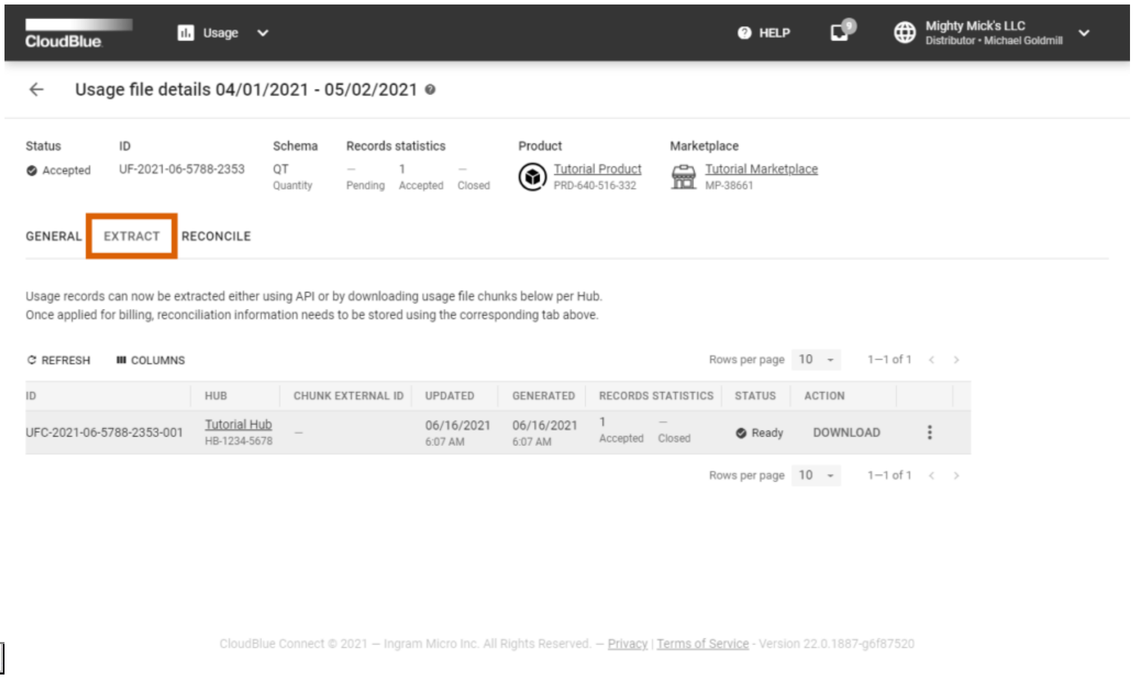




Note that it is possible to automate usage report acceptance by creating a custom script by using the Usage API.

Extracting Data

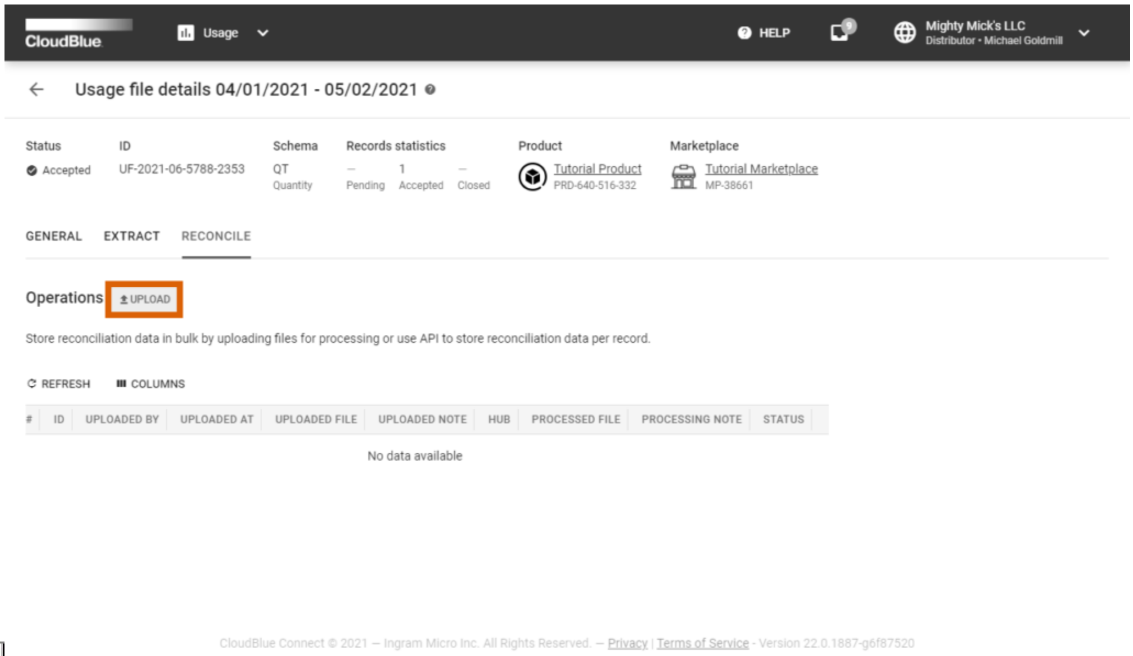
Once a usage report is assigned to the *Accepted* status, Distributors can extract usage data to their systems per a specified hub. Access the **Extract** section of the usage file details screen to download the spreadsheet file. Distributors can also edit the chunk external ID or close the chunk by clicking on the vertical ellipsis (⋮) icon.



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.

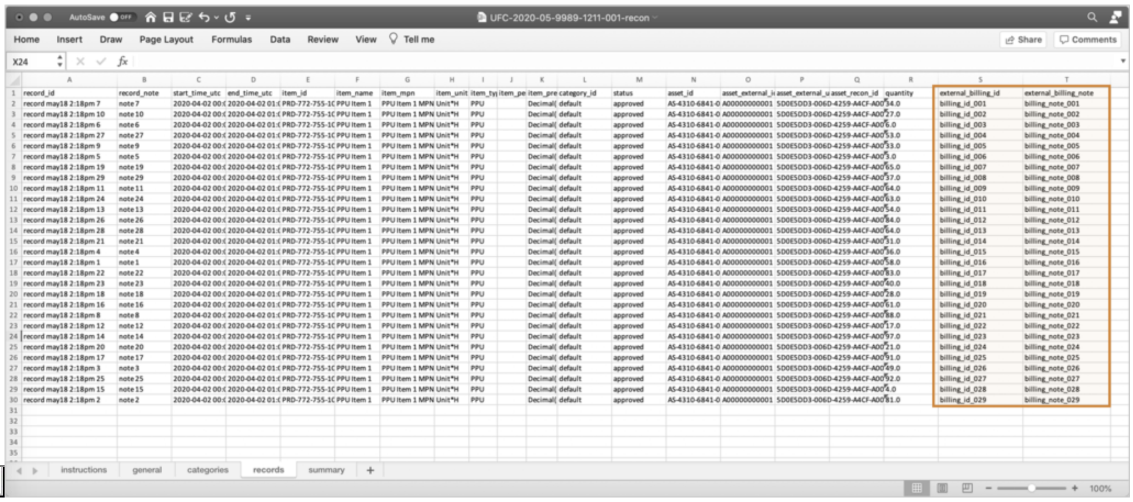
Reconciling Data

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.



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**.