



# TRADEBE CUSTOMER PORTAL

*Connecting your needs*

## User Guide

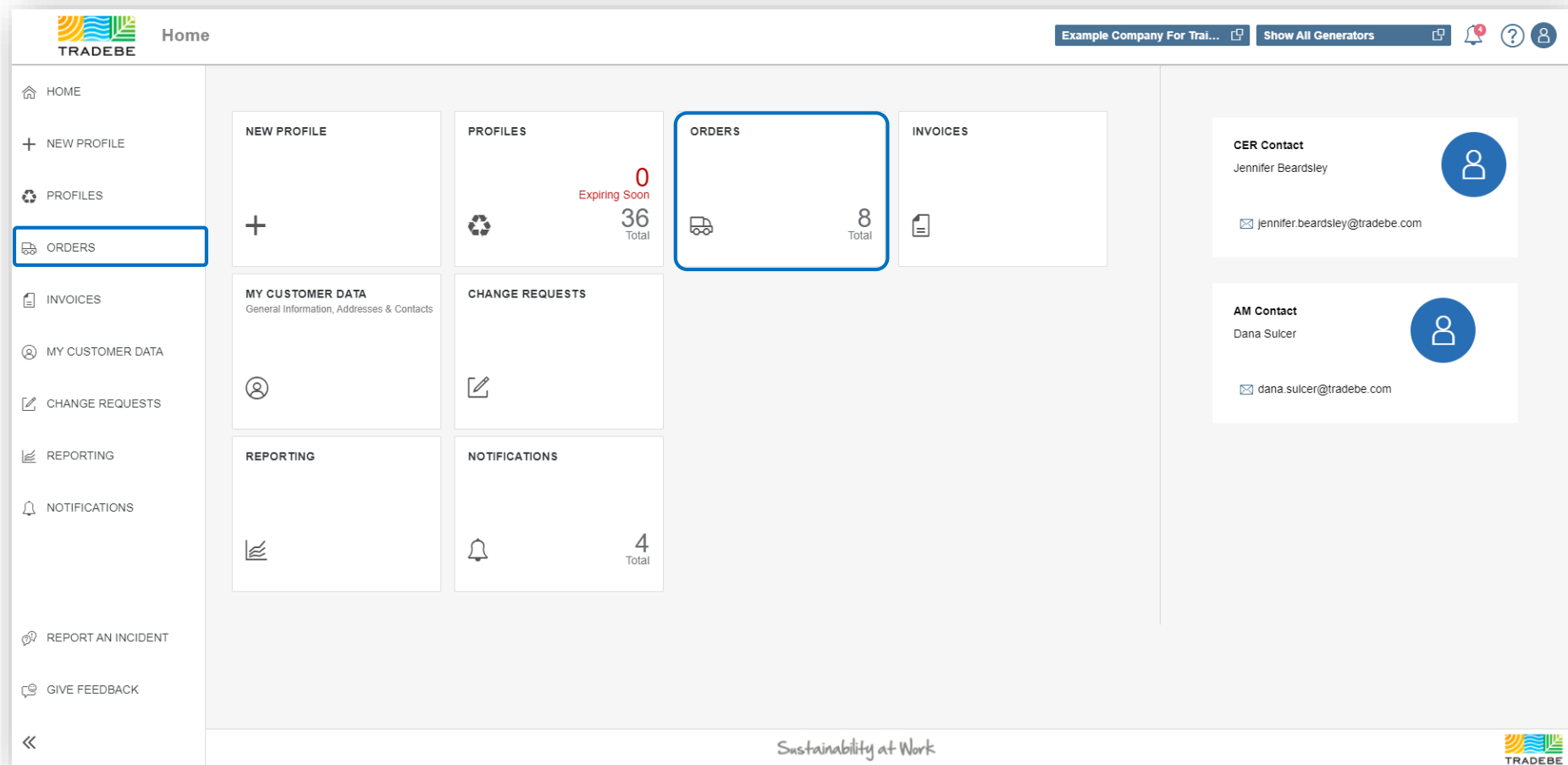
 **Orders**



**TRADEBE**

*Sustainability at Work*

**1 Select Orders**  Either from the left tool bar or the tile on the Home Screen.



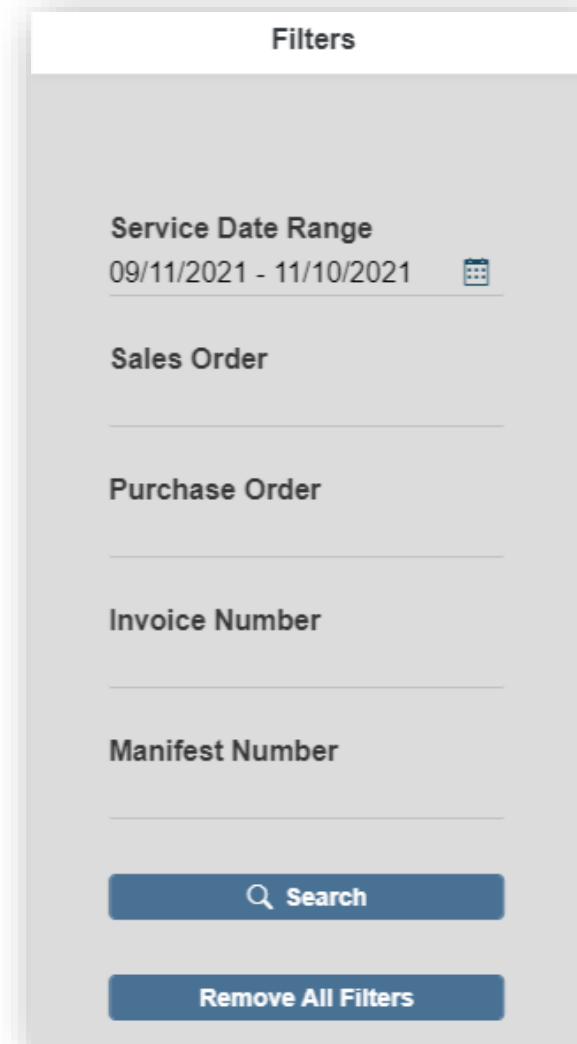
- 1** This view displays all Sales Orders for the Selected Customer, including some characteristic information and providing quick access to related documentation.
- 2** By default, the Date Range is set to previous 30 days. To modify this filter or add any additional one, open the Filters section on the upper left.

**2** Filters

**1** Orders (4) Text search... 🔍 ⬇️ 🔄 🔼 🔽 🔄

Service Date	Generator Name	Sales Order	Purchase Order	Status	Received Date	Invoice Date	Invoice	Manifest	Certificate of Management
11/08/2021	Sulcer Flower Shop	2398780		In transit				2398449	
09/08/2021	Sulcer Flower Shop	2398447	090821SFS-1	Billed	09/08/2021	09/15/2021	4440124079	012345678SFS	2398447
09/08/2021	Sulcer Flower Shop	2398448	090821SFS-1AB	Billed	09/08/2021	09/15/2021	4440124081	012345679SFS	2398448
09/09/2021	Sulcer Flower Shop	2398449	Test	Billed	09/22/2021	11/03/2021	4440124093	022345679SFS	2398449

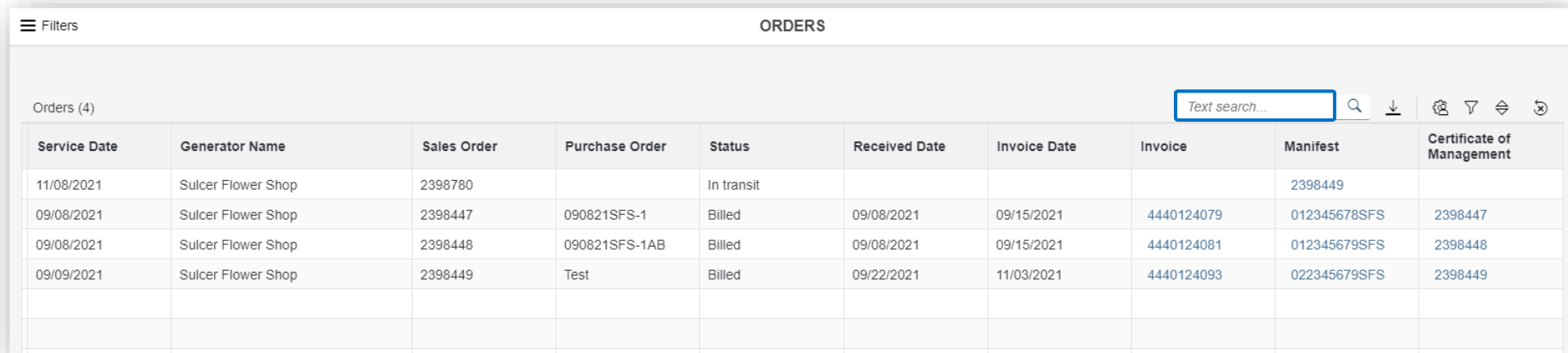
- 1 Select Service Date Range** – It is defaulted to the previous 30 days.
- 2 Add details** in any of the other filter options for more defined results.
- 3 Search.**



The screenshot shows a 'Filters' modal with the following elements:

- Service Date Range:** A date range selector showing '09/11/2021 - 11/10/2021' with a calendar icon to its right.
- Sales Order:** A text input field.
- Purchase Order:** A text input field.
- Invoice Number:** A text input field.
- Manifest Number:** A text input field.
- Search:** A blue button with a magnifying glass icon and the text 'Search'.
- Remove All Filters:** A blue button with the text 'Remove All Filters'.

- 1 Alternatively, **Text Search** can also be used to navigate through the list of orders. The list will update immediately when text is typed in the box.



Filters **ORDERS**

Orders (4)  🔍 ⬇️ 🔄 ⚙️ 🗑️

Service Date	Generator Name	Sales Order	Purchase Order	Status	Received Date	Invoice Date	Invoice	Manifest	Certificate of Management
11/08/2021	Sulcer Flower Shop	2398780		In transit				2398449	
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09/08/2021	Sulcer Flower Shop	2398448	090821SFS-1AB	Billed	09/08/2021	09/15/2021	4440124081	012345679SFS	2398448
09/09/2021	Sulcer Flower Shop	2398449	Test	Billed	09/22/2021	11/03/2021	4440124093	022345679SFS	2398449

- 1 To Open a Document**, be it an Invoice, a Manifest or a Certificate of Management, select the document name for the corresponding Order.

Filters ORDERS

Orders (4) Text search...

Service Date	Generator Name	Sales Order	Purchase Order	Status	Received Date	Invoice Date	Invoice	Manifest	Certificate of Management
11/08/2021	Sulcer Flower Shop	2398780		In transit				2398449	
09/08/2021	Sulcer Flower Shop	2398447	090821SFS-1	Billed	09/08/2021	09/15/2021	<a href="#">4440124079</a>	012345678SFS	2398447
09/08/2021	Sulcer Flower Shop	2398448	090821SFS-1AB	Billed	09/08/2021	09/15/2021	<a href="#">4440124081</a>	012345679SFS	2398448
09/09/2021	Sulcer Flower Shop	2398449	Test	Billed	09/22/2021	11/03/2021	<a href="#">4440124093</a>	022345679SFS	2398449

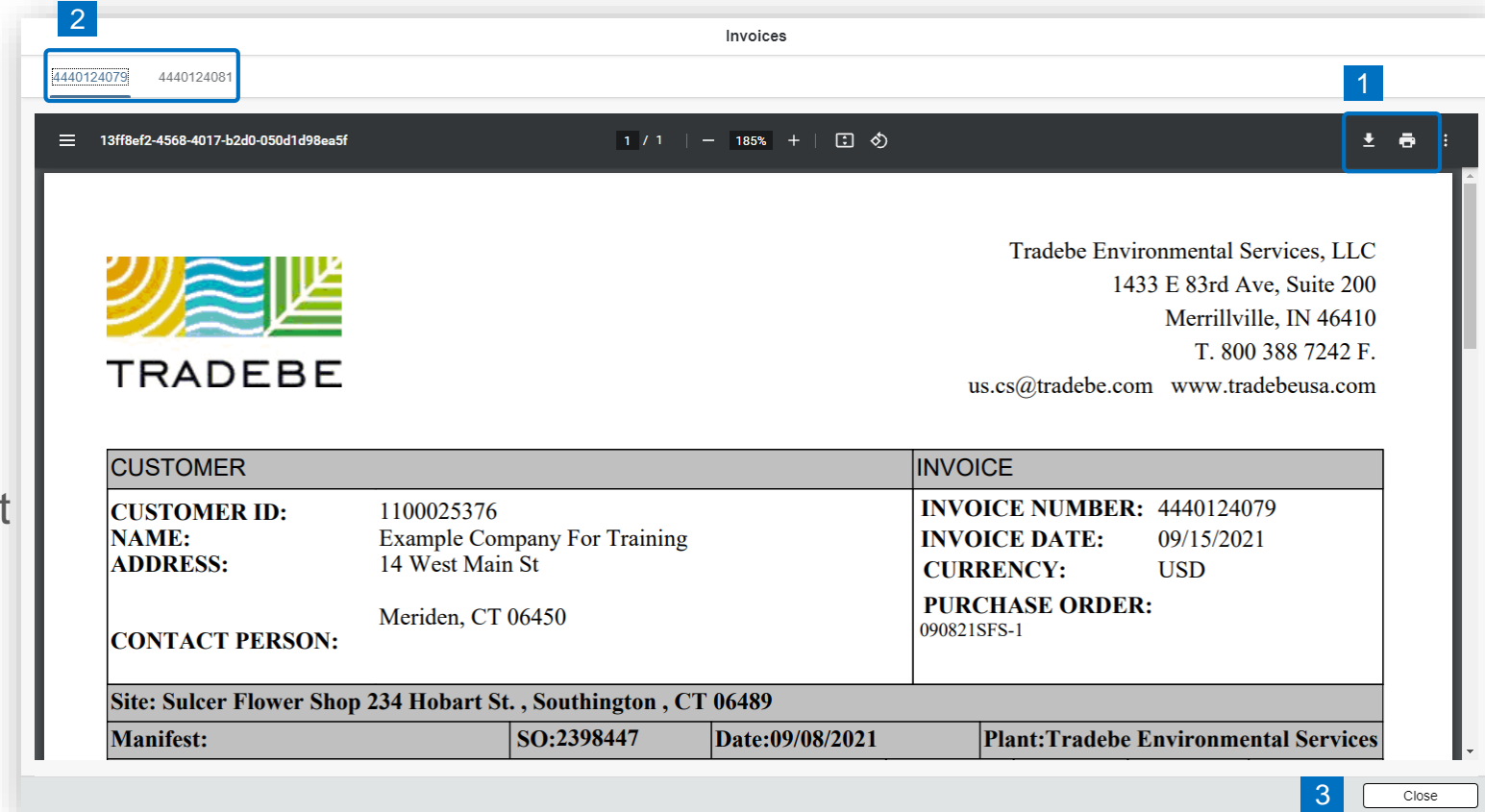
 *Tip: the name of the document displayed in blue indicates it's a clickable link.*

## 1 Document View actions:

- Download
- Print

2 When multiple documents are included in an order (*i.e. multiple Manifests*), toggle using the document name at the top.

3 Close to go back to the List View.



Invoices

4440124079 4440124081

13ff8ef2-4568-4017-b2d0-050d1d98ea5f 1 / 1 185%


TRADEBE

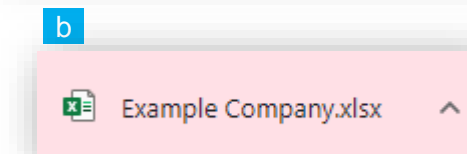
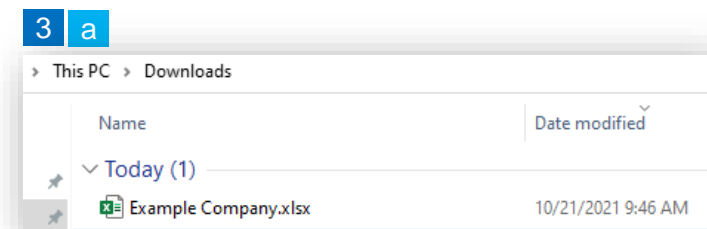
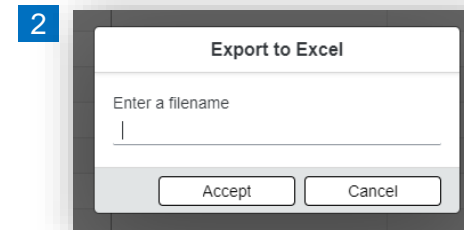
Tradebe Environmental Services, LLC  
1433 E 83rd Ave, Suite 200  
Merrillville, IN 46410  
T. 800 388 7242 F.  
us.cs@tradebe.com www.tradebeusa.com

CUSTOMER		INVOICE	
<b>CUSTOMER ID:</b>	1100025376	<b>INVOICE NUMBER:</b>	4440124079
<b>NAME:</b>	Example Company For Training	<b>INVOICE DATE:</b>	09/15/2021
<b>ADDRESS:</b>	14 West Main St	<b>CURRENCY:</b>	USD
	Meriden, CT 06450	<b>PURCHASE ORDER:</b>	090821SFS-1
<b>CONTACT PERSON:</b>			
<b>Site: Sulcer Flower Shop 234 Hobart St. , Southington , CT 06489</b>			
<b>Manifest:</b>	SO:2398447	<b>Date:</b> 09/08/2021	<b>Plant:</b> Tradebe Environmental Services

Close


## Export Orders List

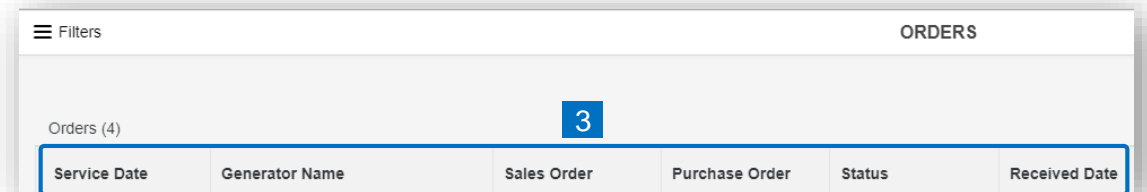
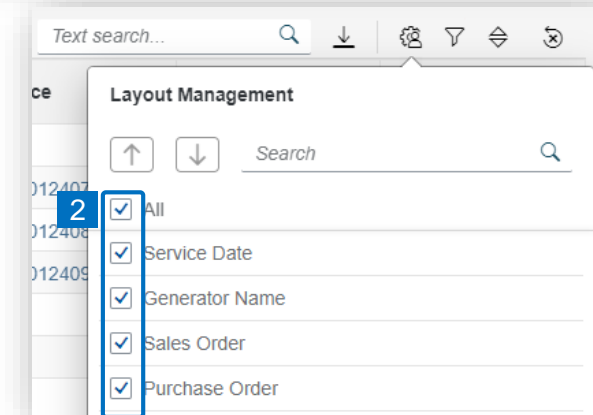
- 1** Export orders list to Excel by clicking on the download button .
- 2** Enter a File Name in the pop-up to save the document in your computer.
- 3** The file will save in your computer in the 'Downloads' folder. **a**  
It will also appear at the bottom-left of your screen when completed. **b**








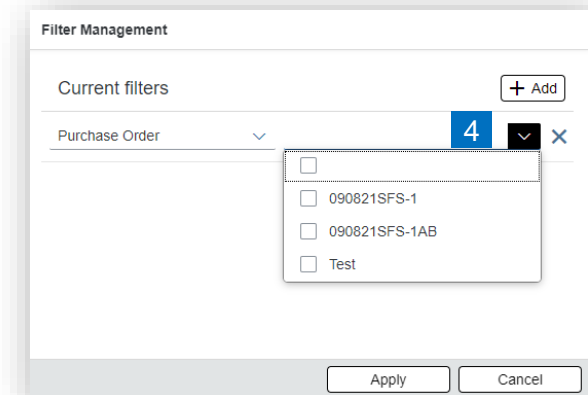
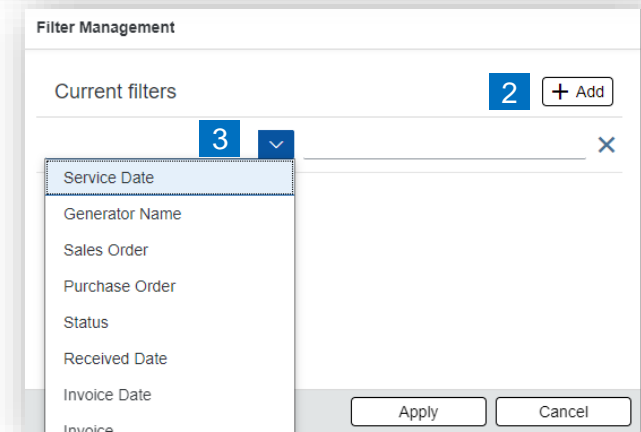
## Change Layout

- 1 Select the 'Change Layout' icon .
- 2 The selected check boxes will show as columns on the list view.
- 3 Reorder columns on the list view, by selecting the column header and dragging left or right.



## Filtering

- 1** Select the 'Filtering' icon  .
- 2** Select 'Add'  .
- 3** Select the **column** that will be filtered from the left drop-down list.
- 4** Select **specific item(s) to filter** from the right drop-down list, then "Apply".
- 5** To **clear all filters**, click on the icon  .



## Sorting

### 1 Sorting “Option 1”:


- Click on the ‘Sorting’ button
- Select “Determine by me”
- Select “Add”
- Select specific column to sort
- Choose sorting order.

### 2 Sorting “Option 2”:

Right click on the header of the column to sort by and select either ascending or descending.

1

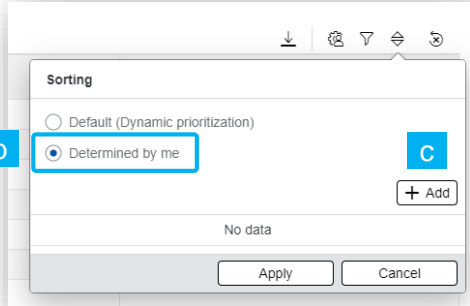
a



Text search... [Search] [Download] [Refresh] [Filter] [Sort] [Close]

b

c



Sorting

Default (Dynamic prioritization)

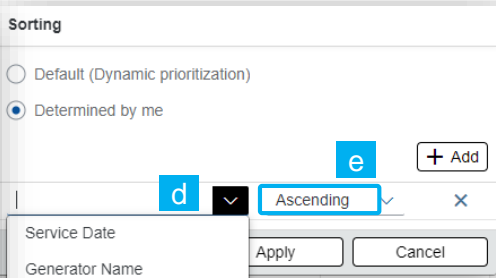
Determined by me

+ Add

No data

Apply Cancel

e



Sorting

Default (Dynamic prioritization)

Determined by me

+ Add

d

Ascending



Service Date

Generator Name

Apply Cancel

2

Orders (4)










Service Date	Generator Name	Sales Order	Purchase Order
11/08/2021	Sulcer Flower Shop	 Sort Ascending	
09/08/2021	Sulcer Flower Shop	 Sort Descending	090821SFS-1
09/08/2021	Sulcer Flower Shop	2398448	090821SFS-1AB
09/09/2021	Sulcer Flower Shop	2398449	Test

Help

*Still have questions?*

*Contact your CER or e-mail us at [adminportal@tradebe.com](mailto:adminportal@tradebe.com)*

# Access To Other User Guides

Portal Functionality	PDF Guide
 Home Screen	<a href="#">Link</a>
 Profiles	<a href="#">Link</a>
 <b>Orders</b>	<i>This guide</i>
 Invoices	<a href="#">Link</a>
 My Customer Data	<a href="#">Link</a>
 Change Requests	<a href="#">Link</a>
 Reporting	<a href="#">Link</a>
 Notifications	<a href="#">Link</a>
 Request a New User	<a href="#">Link</a>



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