TRADEBE CUSTOMER PORTAL

Connecting your needs

User Guide

Home Screen & General Navigation

TRADEBE

Sustainability at Work

Preferred Browser: Google Chrome

Link:
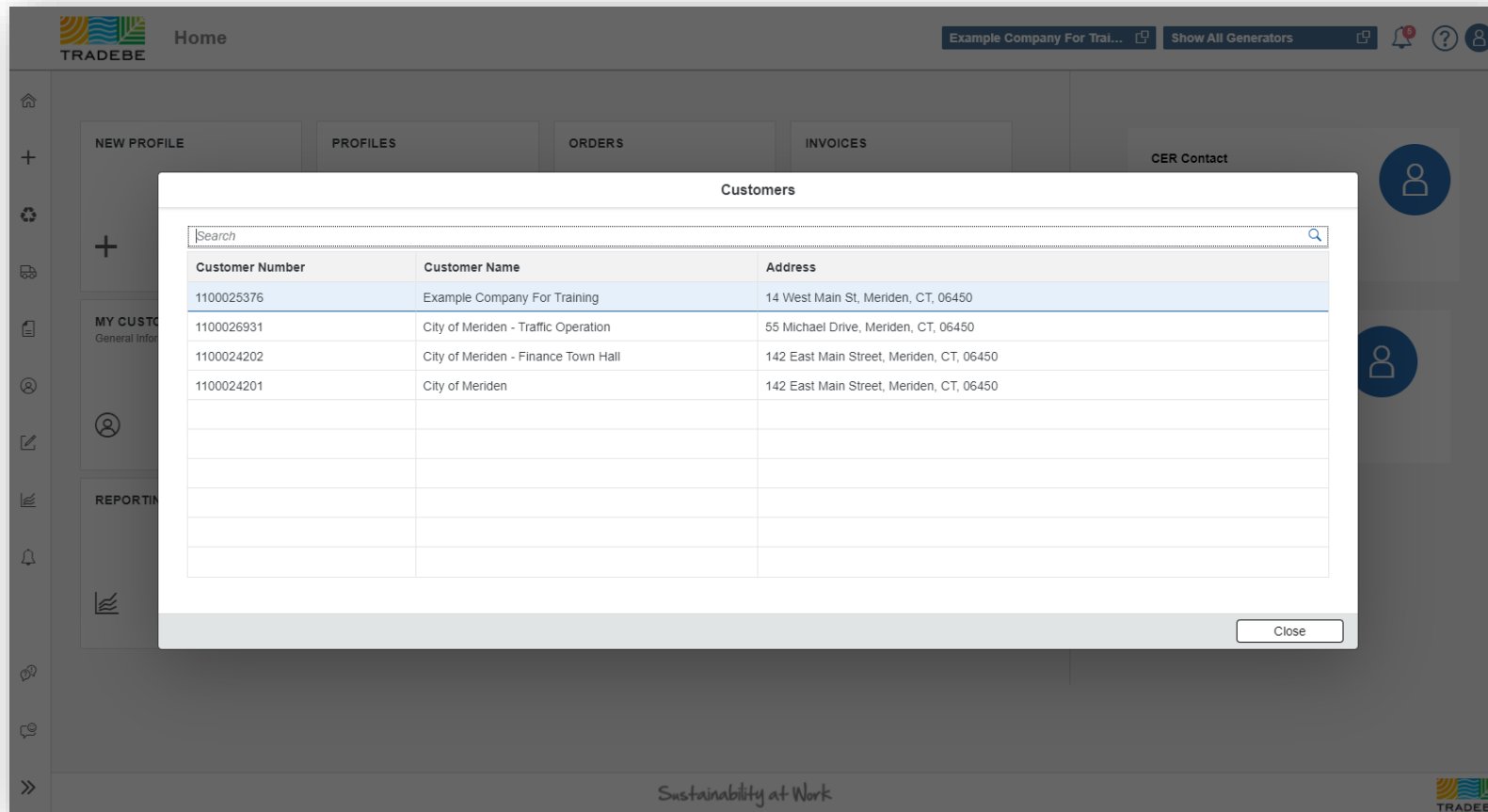https://prdbtpesus.cpp.cfapps.us10.hana.ondemand.com/site#customerportal-display&/
Tip: add a bookmark in your browser.

User: Your Tradebe Email

Password: Once you access the URL link above for the first time, select the "Forgot Password?" button and follow instructions to reset your password and set your own.

Home Screen | Select Customer
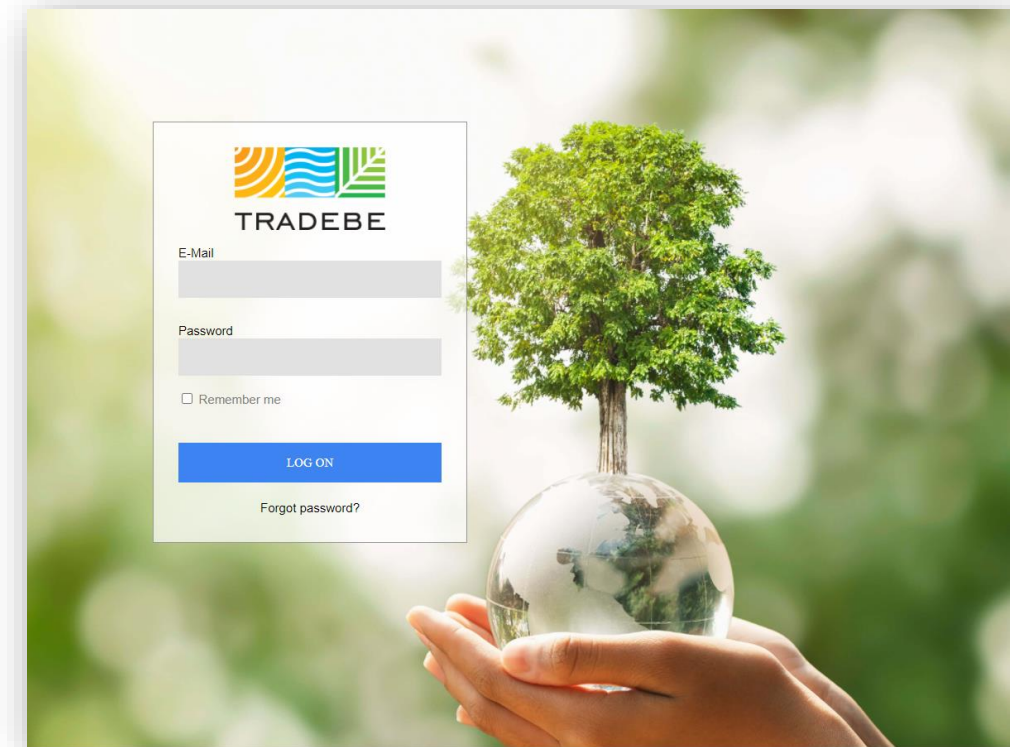
1 **Select Customer** – This first step is required in order to make use of the portal. The search bar is "Smart Text" and allows to search anything that is within the displayed fields.

Note: *The customer selected in this Home Screen will be carried over as the default selection in all the screens.*

Home Screen | Example Searches

1 Smart Text **Example Searches:**
   a. Customer Name
   b. Customer Id
   c. Portion of Address

Customers

a | example

Customer Number	Customer Name	Address
1100025376	Example Company For Training	14 West Main St, Meriden, CT, 06450
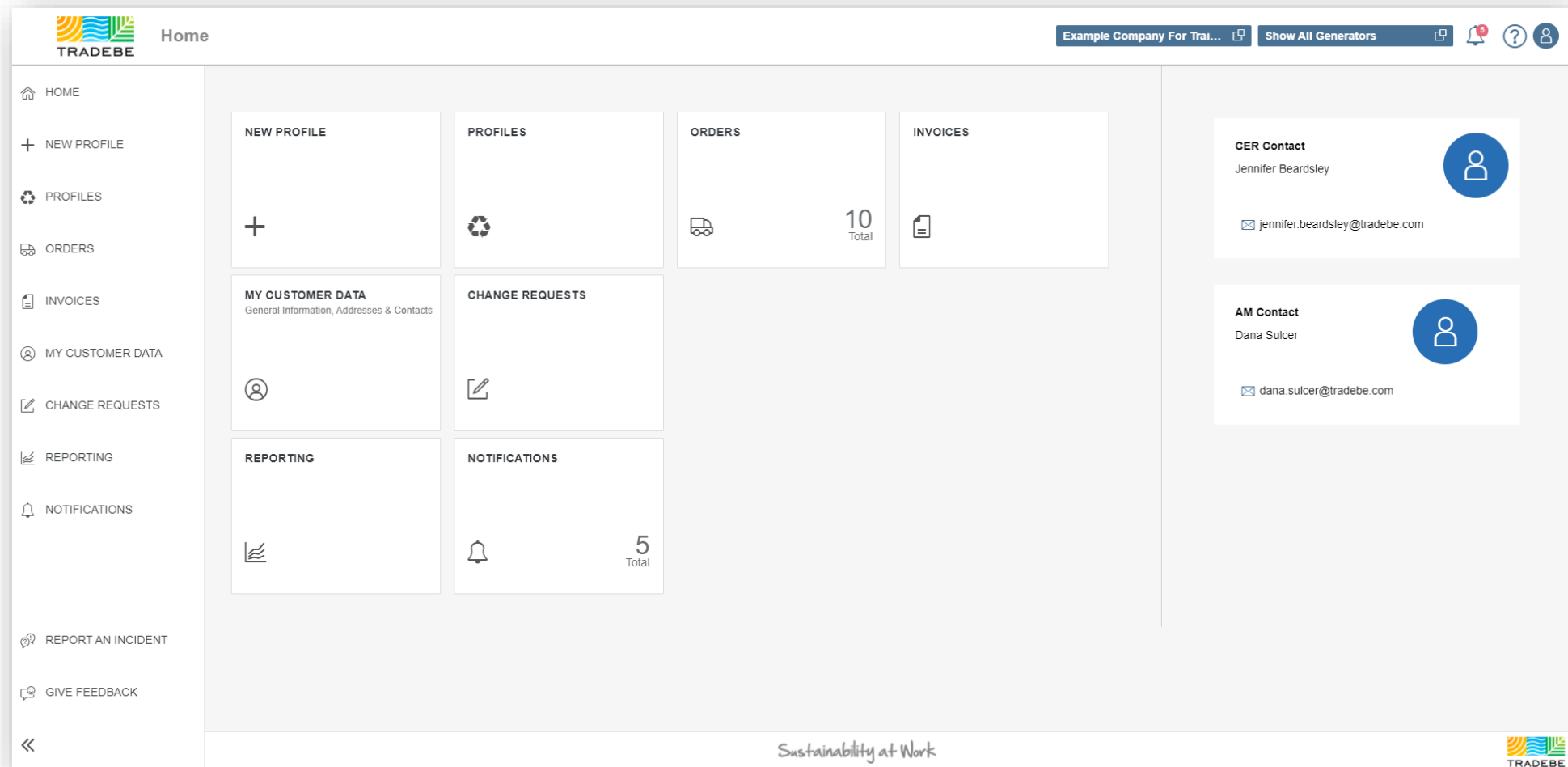
Customers

b | 1100025376

Customer Number	Customer Name	Address
1100025376	Example Company For Training	14 West Main St, Meriden, CT, 06450

Customers

c | 14 west

Customer Number	Customer Name	Address
1100025376	Example Company For Training	14 West Main St, Meriden, CT, 06450

Home Screen / Dashboard

Home Screen | Default View

General Navigation

1. **Customer Selection** acts as a header and will carry over to all screens within the Portal.

2. **Generator** defaults to "Show All Generators", however a single generator may also be selected

Home Screen | Default View
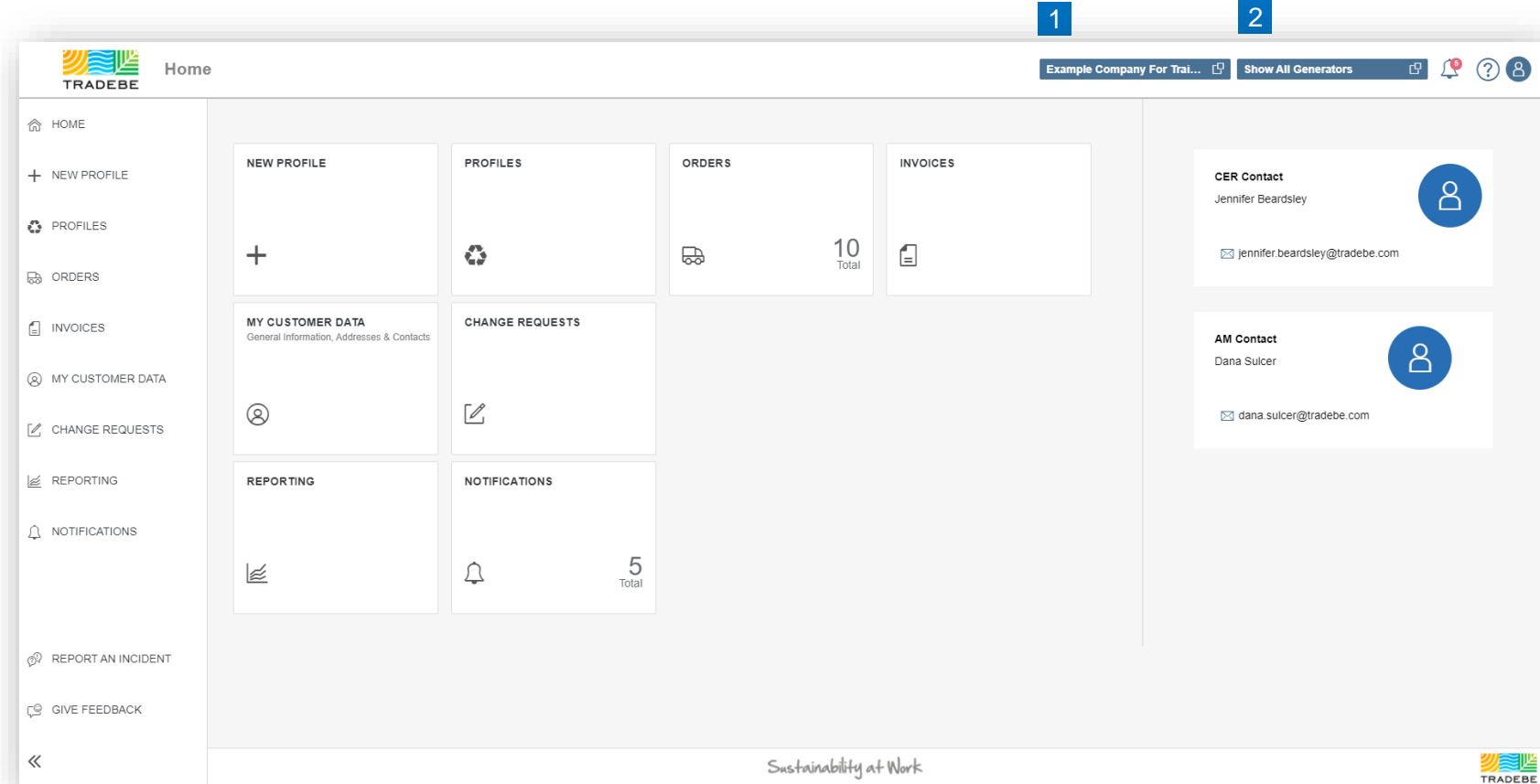
General Navigation

1 Each feature may be accessed from either the tiles or the tool bar on the left.

2 Tool Bar Expands or Collapses by selecting the icon on the bottom-left.

3 While tool bar is collapsed you can see the description of the item by hovering over the text.
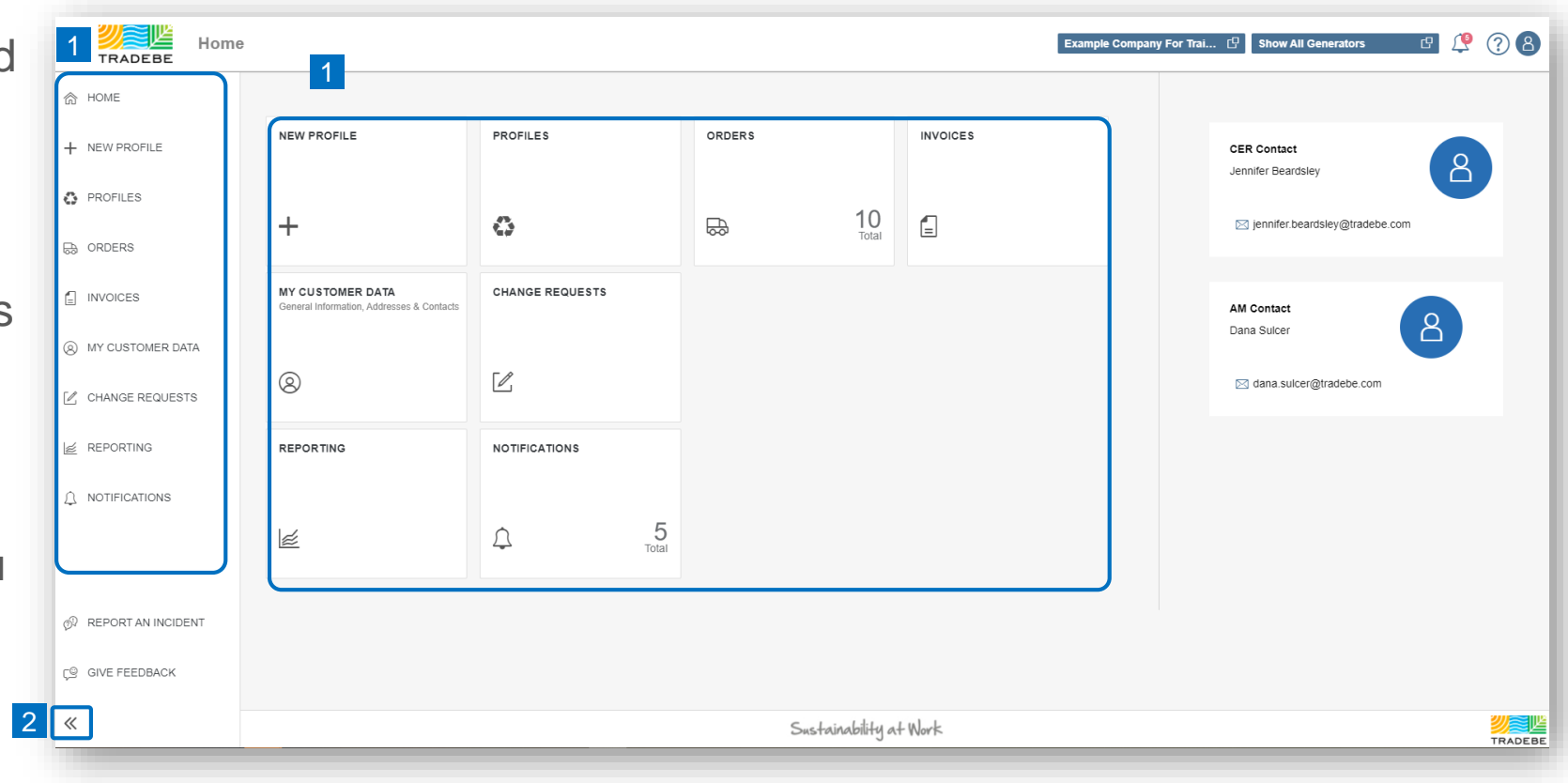
Home Screen | Default View

Additional Features

1 Notifications 🔔

2 User Guides / Help ❓

3 Access My Data 👤

4 Report an Incident

5 Give Feedback 💬

Additional Features

1 Notifications 🔔⁶

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Selecting a Notification will open the object involved.

Notifications

The Profile 1000344036 is now with status Pending Signature.
10/28/2021, 9:50 AM

The Profile 1000342902 is now with status Approved.
10/27/2021, 9:53 AM

The Profile 1000343815 is now with status Approved.
10/27/2021, 9:33 AM

Bobby Dunn has requested a change to the Master Data record for 1140000294 - Drake University
10/26/2021, 4:27 PM

The Profile 1000343171 is now with status Pending Lab Results.
10/25/2021, 1:28 PM

More
[5 / 17]

See all notifications   Close

Additional Features

1 Notifications 🔔 16

2 User Guides / Help ❓

3 Access My Data 👤

4 Report an Incident

5 Give Feedback 💬

#	Portal Functionality	PDF Guide	Video Guide
1	Home Screen and General Navigation	Link	Link
2	Profiles	Link	Link
3	Orders	Link	Link
4	Invoices	Link	Link
5	My Customer Data	Link	Link
6	Reporting	Link	Link
7	Change Requests	Link	Link
8	User Management	Link	Link
9	Notifications	Link	Link
10	Request a New User	Link	Link

User Guide

Request Help   Close

User Guides covering each Portal Functionality are available here.

Additional help can be requested through the "Request Help" button.

Additional Features

1 Notifications 🔔¹⁶

2 User Guides / Help ❓

3 Access My Data 👤

4 Report an Incident 💬

5 Give Feedback 💬

3

Jennifer Beardsley

Access My Data

Close

My Personal Data

Name	Email
Jennifer Beardsley	jennifer.beardsley@tradebe.com

Function	Department
US_TRADEBE_CUSTOMER_SERVICES,US_TRADEBE_U...	

Phone
888-2760887
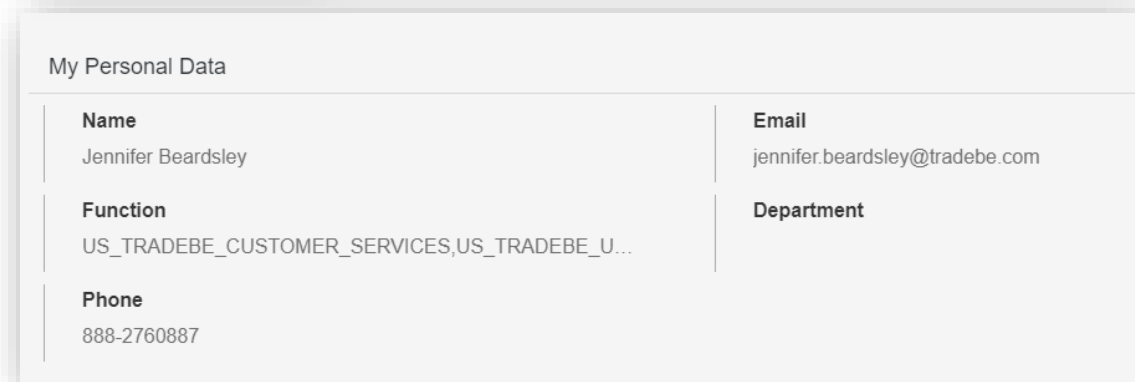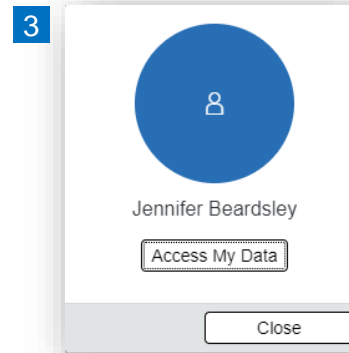
View Log In Email address as well as Selected "User Access Roles".

Home Screen | Additional Features

Additional Features

1 Notifications 🔔

2 User Guides / Help ❓

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4 Report an Incident
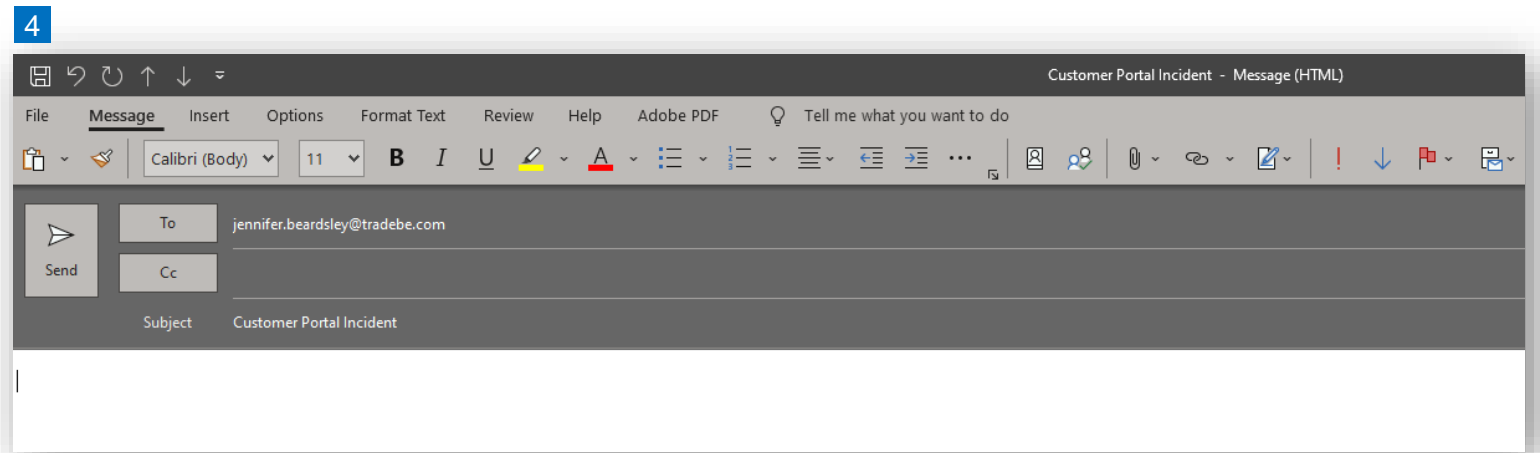
5 Give Feedback 💬

A New E-mail window will pop-up with the CER associated with Customer Account as the default recipient.

Home Screen | Additional Features

Additional Features

1 Notifications 🔔

2 User Guides / Help ❓

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4 Report an Incident 💬

5 Give Feedback 💬

Customer Portal Feedback

Thank you for taking a moment to tell us what you think! Please include anything you like or don't like about Tradebe's Customer Portal, as well as any new features you'd like to see in the future. This feedback helps us improve our services.

OK

* 1. Rate your overall experience with Tradebe's Customer Portal

This will open a link to the Customer Portal Survey in a new tab.

Please take a minute and let us know your thoughts on the Portal.
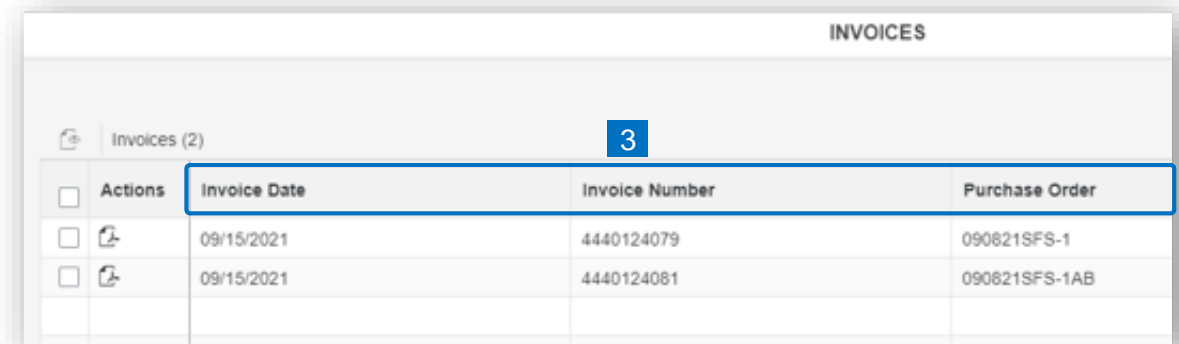
Export List Views to Excel

1   **Export lists 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**
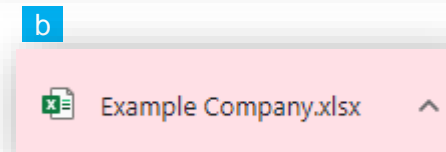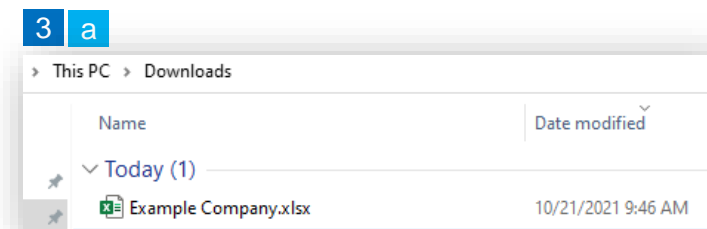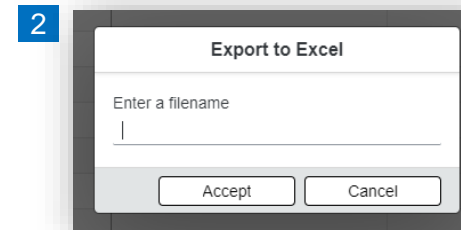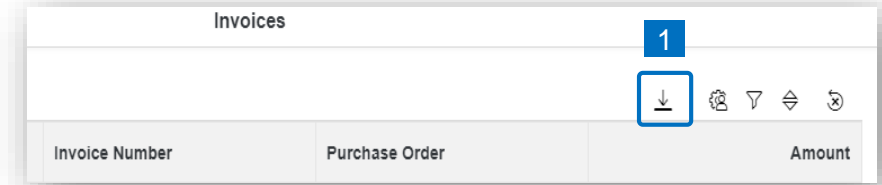
Manage Layout Of List Views

1   **Select** the 'Layout Management' icon.

2   **The selected check boxes** will show as columns on the List View.

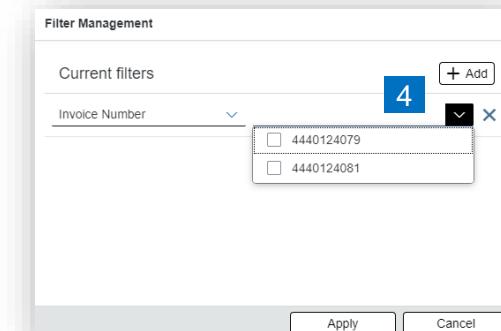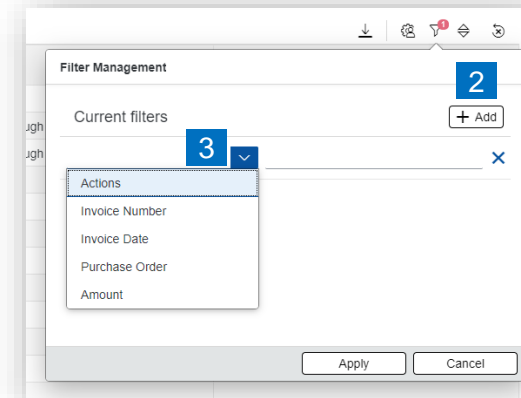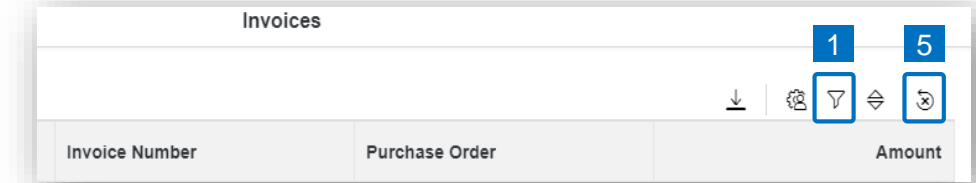**3**   **Reorder columns** on the List View, by selecting the column header and dragging left or right.
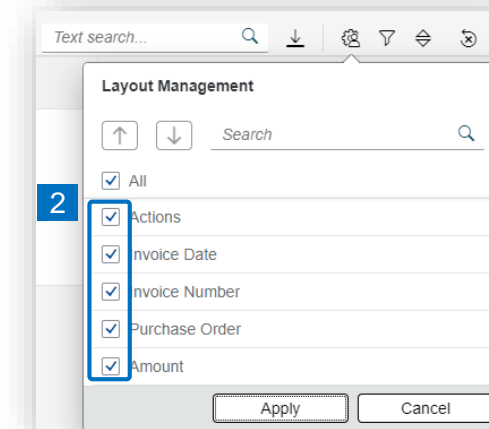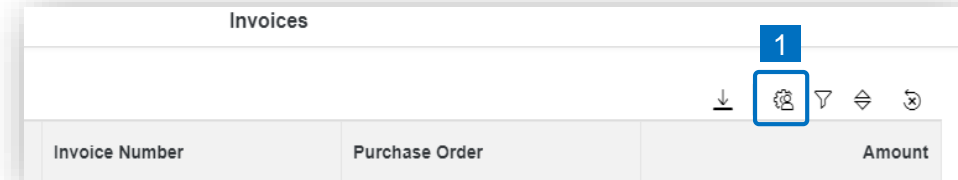
Filter Lists

1 **Select the 'Filtering' icon** .

2 **Select 'Add** [+ 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".

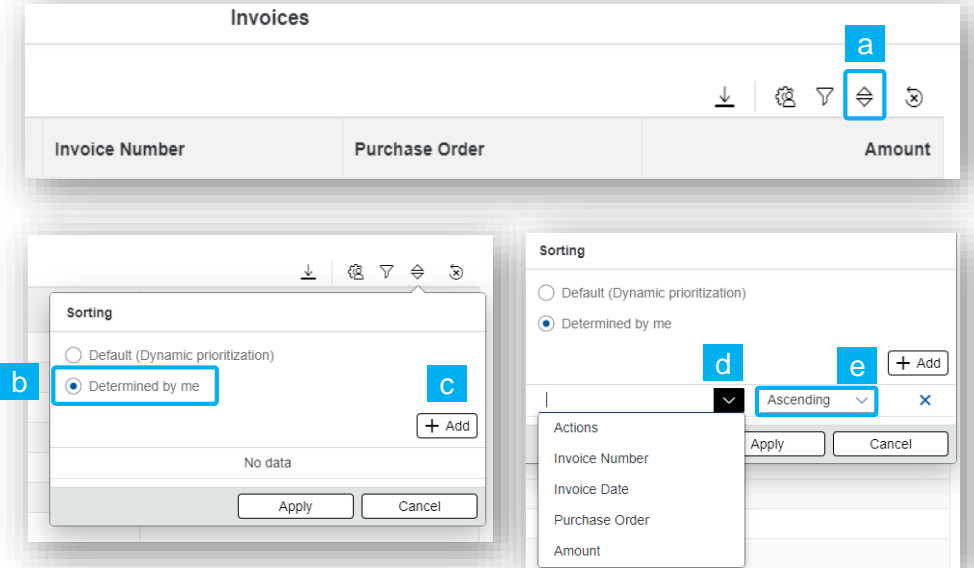**5** **To clear all filters,** click on the icon .

Sort Lists

1 Sorting "Option 1":
a.   Click on the 'Sorting' button
b.   Select "Determine by me"
c.   Select "Add"
d.   Select specific column to sort
e.   Choose sorting order.
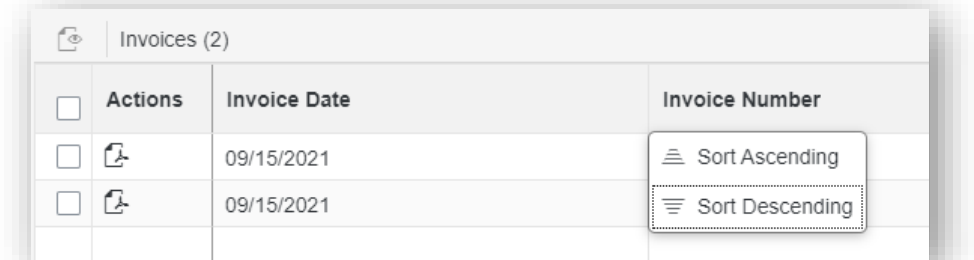
2 Sorting "Option 2":
Right click on the header of the column to sort by and select either ascending or descending.

Help

Still have questions?

Contact your CER or e-mail us at adminportal@tradebe.com

Access To Other User Guides

Portal Functionality	PDF Guide
⌂ **Home Screen**	*This guide*
♻ Profiles	Link
🚚 Orders	Link
🗎 Invoices	Link
⊘ My Customer Data	Link
✎ Change Requests	Link
📈 Reporting	Link
🔔 Notifications	Link
👤⊕ Request a New User	Link

TRADEBE

Sustainability at Work

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