



TRADEBE CUSTOMER PORTAL

Connecting your needs

User Guide



Home Screen

& General Navigation



TRADEBE

Sustainability at Work

Preferred Browser: Google Chrome

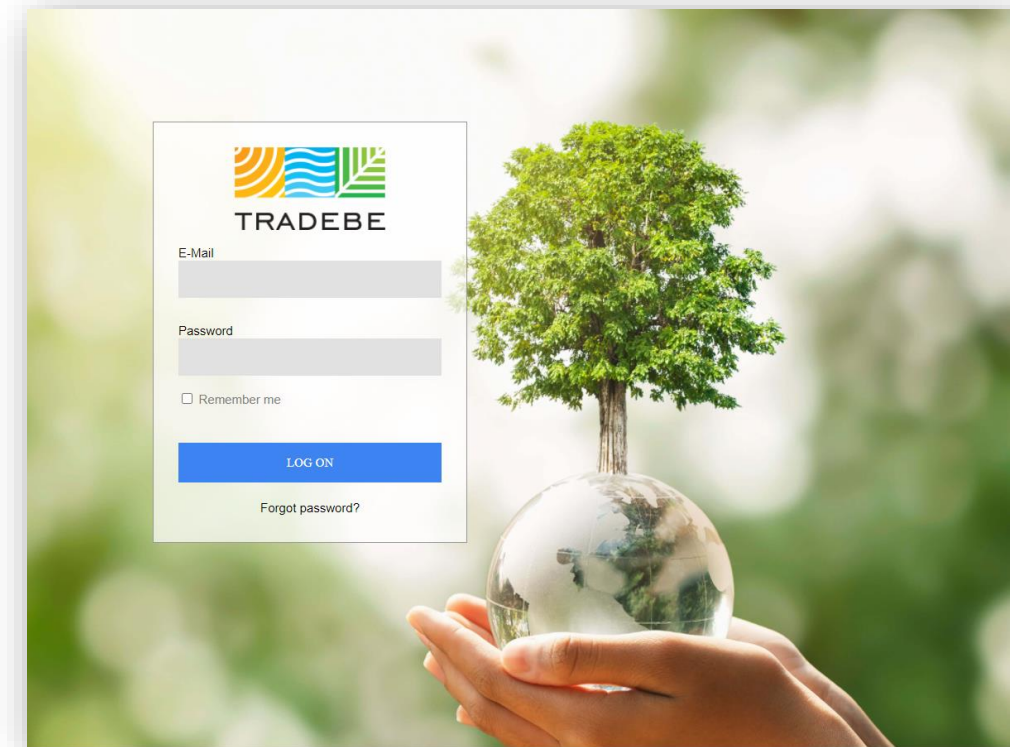
Link:

<https://prdbtpesus.cpp.cfapps.us10.hana.ondemand.com/site#customerportal-display&/>

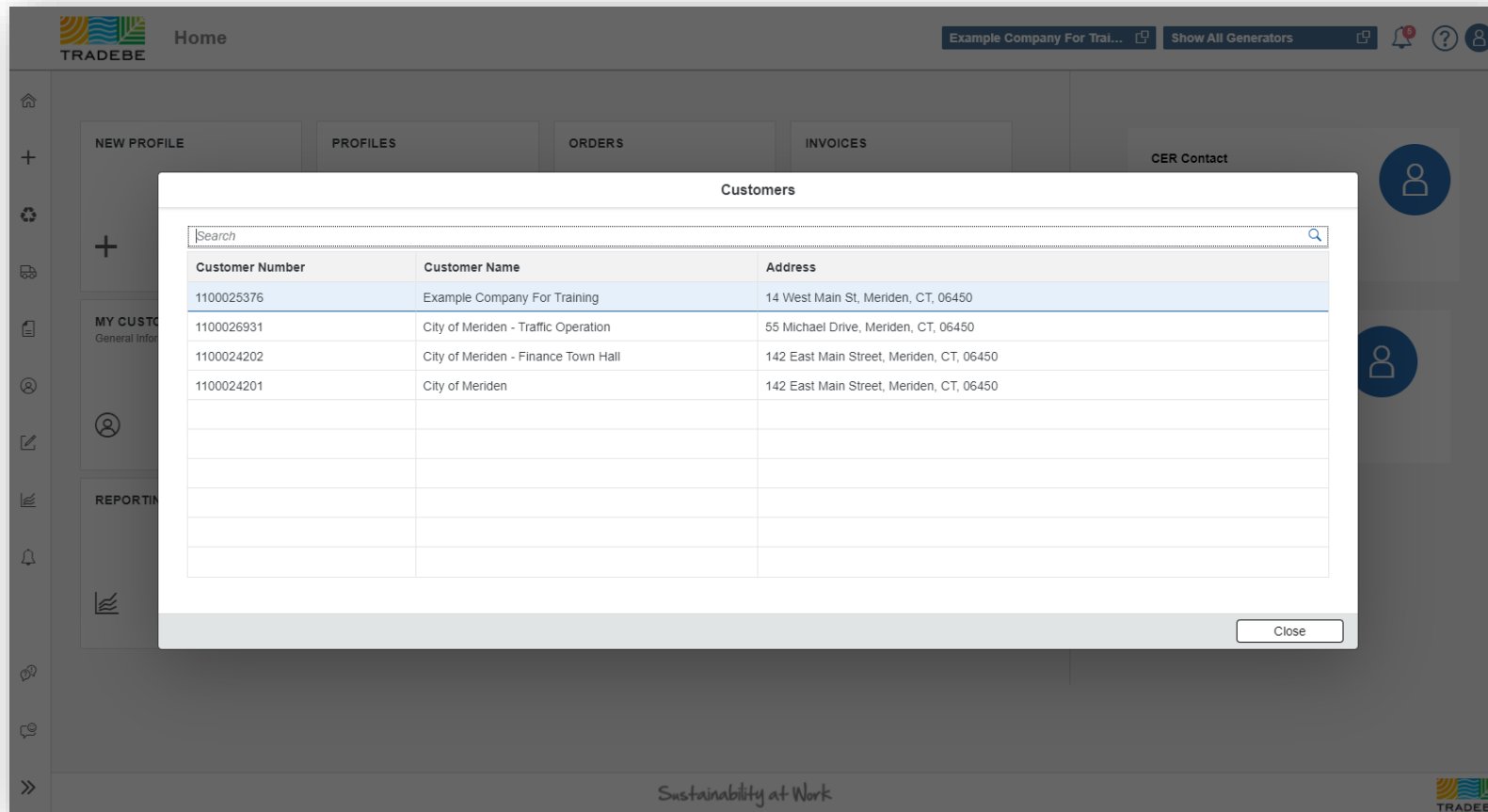
Tip: add a bookmark in your browser.

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.



- 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.



The screenshot displays the TRADEBE Home Screen interface. At the top, the TRADEBE logo and 'Home' text are visible on the left, and a search bar with 'Example Company For Trai...' and 'Show All Generators' is on the right. Below the header, there are navigation tabs for 'NEW PROFILE', 'PROFILES', 'ORDERS', 'INVOICES', and 'CER Contact'. A 'Customers' modal window is open in the center, featuring a search bar and a table with the following data:

Customer Number	Customer Name	Address
1100025376	Example Company For Training	14 West Main St, Meriden, CT, 06450
1100026931	City of Meriden - Traffic Operation	55 Michael Drive, Meriden, CT, 06450
1100024202	City of Meriden - Finance Town Hall	142 East Main Street, Meriden, CT, 06450
1100024201	City of Meriden	142 East Main Street, Meriden, CT, 06450

The modal also includes a 'Close' button at the bottom right. The background shows a sidebar with various icons and a 'Sustainability at Work' footer.

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

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

a

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

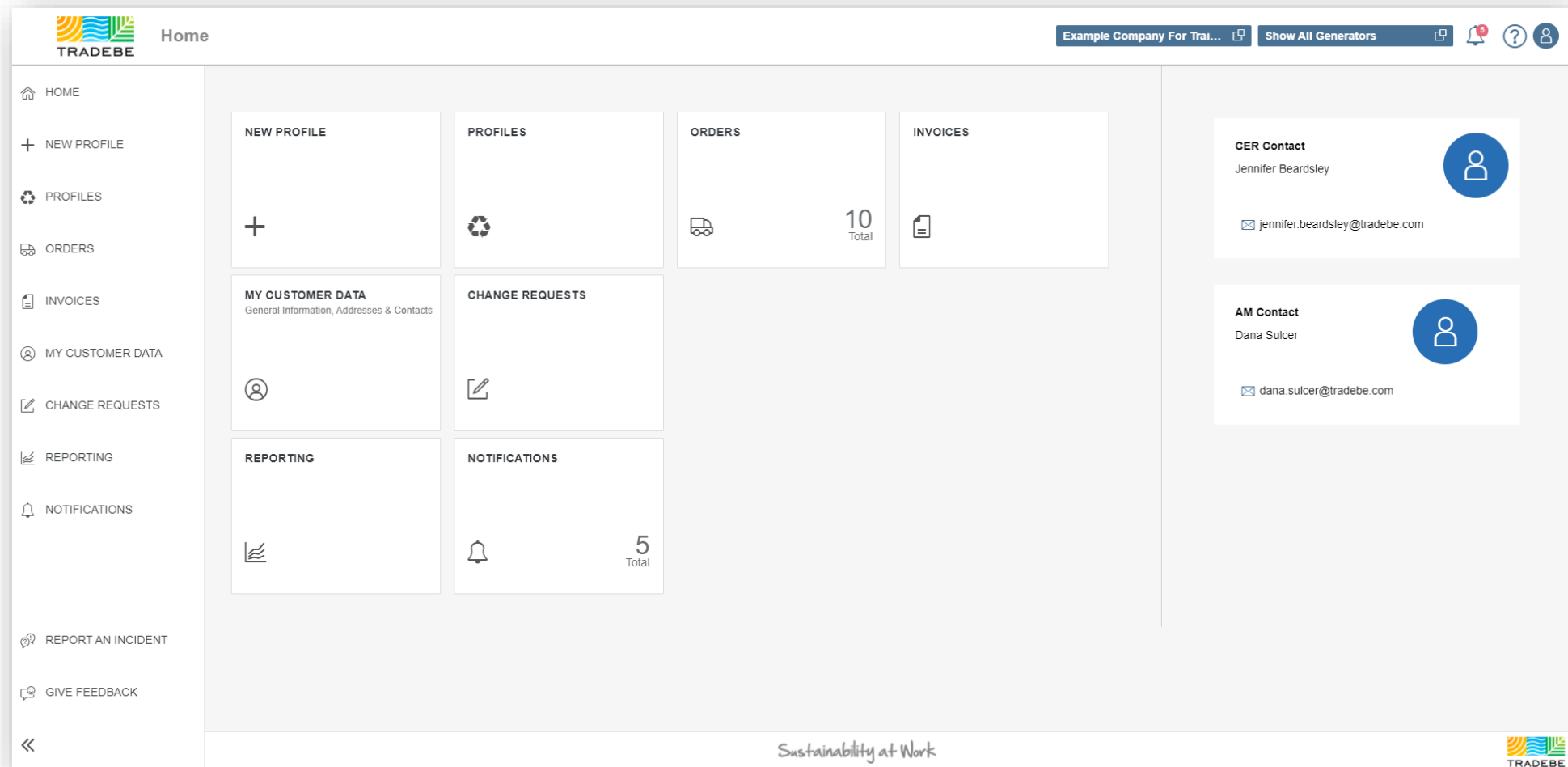
b

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

c

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

Home Screen / Dashboard

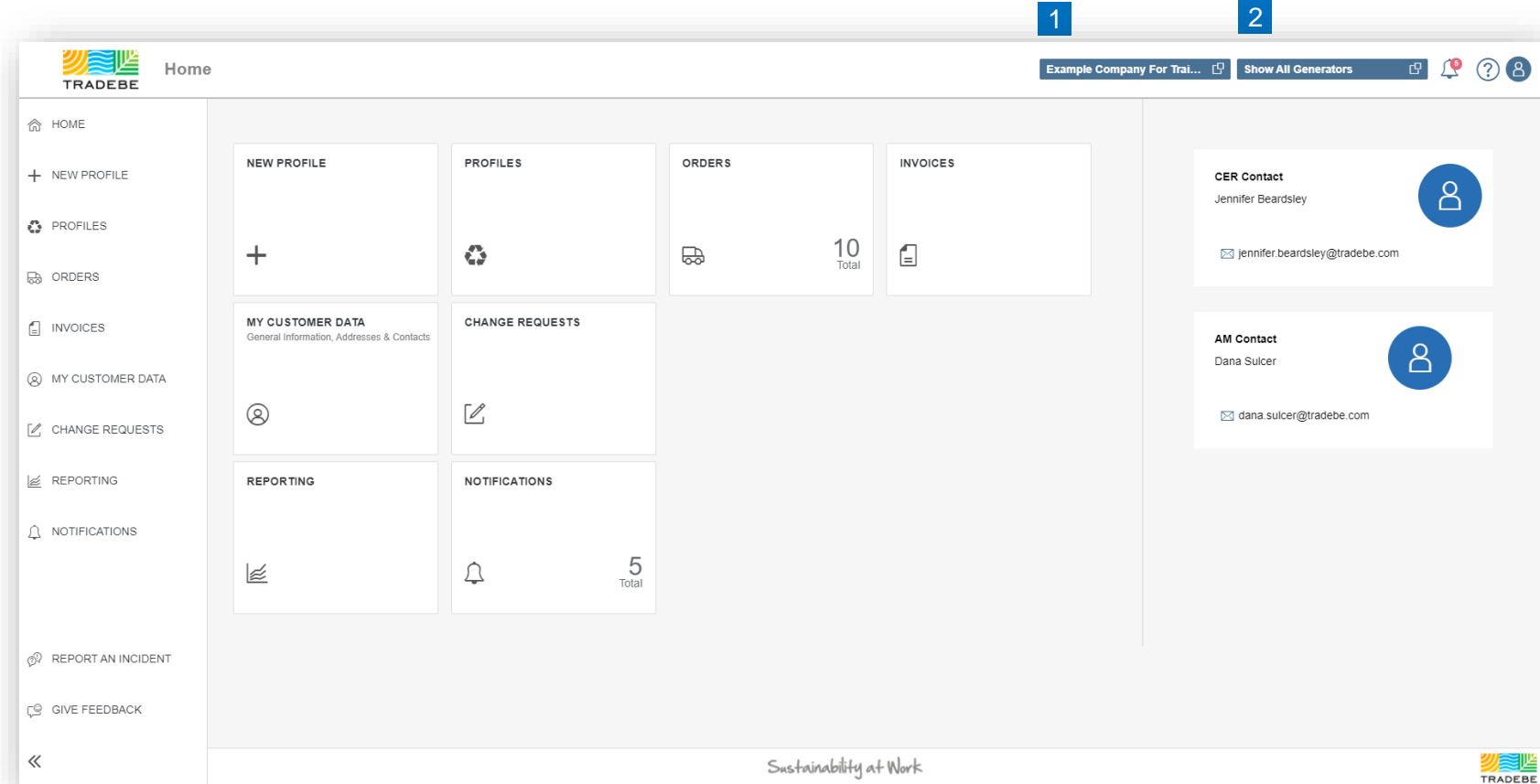


The screenshot displays the TRADEBE Home Screen / Dashboard. At the top left is the TRADEBE logo and the word "Home". The top right features a user profile for "Example Company For Trai...", a "Show All Generators" button, and notification, help, and user icons. A left sidebar lists navigation options: HOME, NEW PROFILE, PROFILES, ORDERS, INVOICES, MY CUSTOMER DATA, CHANGE REQUESTS, REPORTING, NOTIFICATIONS, REPORT AN INCIDENT, and GIVE FEEDBACK. The main dashboard area contains several widgets: "NEW PROFILE" with a plus icon, "PROFILES" with a refresh icon, "ORDERS" showing a truck icon and "10 Total", "INVOICES" with a document icon, "MY CUSTOMER DATA" (General Information, Addresses & Contacts) with a person icon, "CHANGE REQUESTS" with a pencil icon, "REPORTING" with a bar chart icon, and "NOTIFICATIONS" showing a bell icon and "5 Total". On the right, two contact cards are shown: "CER Contact" Jennifer Beardley (jennifer.beardsley@tradebe.com) and "AM Contact" Dana Sulcer (dana.sulcer@tradebe.com), each with a person icon. The footer includes the slogan "Sustainability at Work" and the TRADEBE logo.

General Navigation

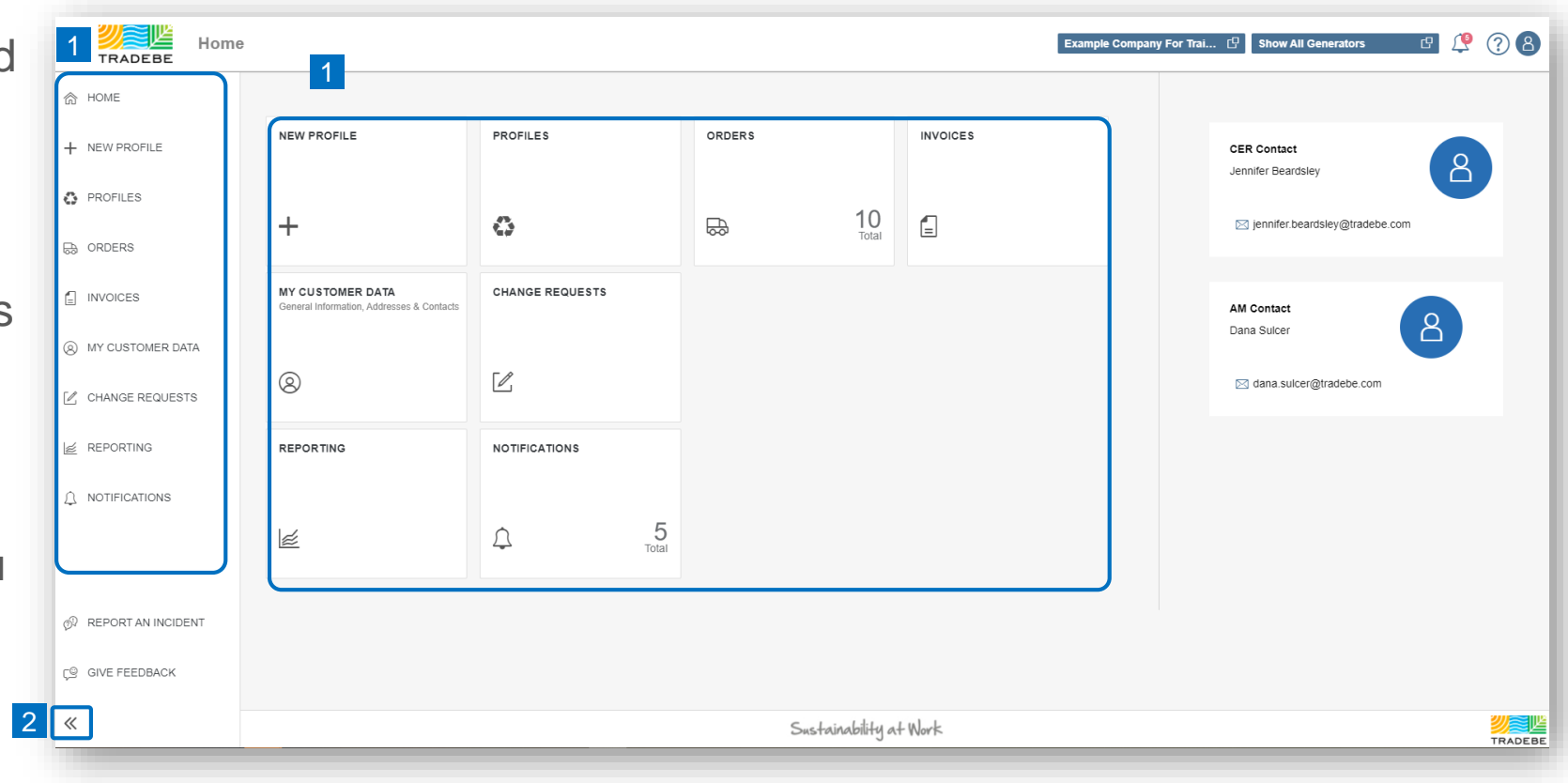
1 **Customer Selection** acts as a header and will carry over to all screens within the Portal.

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



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

TRADEBE Home

Example Company For Tra... Show All Generators

1 2 3

HOME

+ NEW PROFILE

PROFILES

ORDERS

INVOICES

MY CUSTOMER DATA

CHANGE REQUESTS

REPORTING

NOTIFICATIONS

NEW PROFILE

PROFILES

ORDERS 10 Total

INVOICES

MY CUSTOMER DATA
General Information, Addresses & Contacts

CHANGE REQUESTS

REPORTING

NOTIFICATIONS 5 Total

CER Contact
Jennifer Beardsley
jennifer.beardsley@tradebe.com

AM Contact
Dana Sulcer
dana.sulcer@tradebe.com

4 REPORT AN INCIDENT

5 GIVE FEEDBACK

Sustainability at Work

TRADEBE

Additional Features

1 Notifications 

2 User Guides / Help 

3 Access My Data 

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5 Give Feedback 

1

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](#)

Selecting a Notification will open the object involved.

Additional Features

1 Notifications 

2 User Guides / Help 

3 Access My Data 

4 Report an Incident 

5 Give Feedback 

2






User Guide

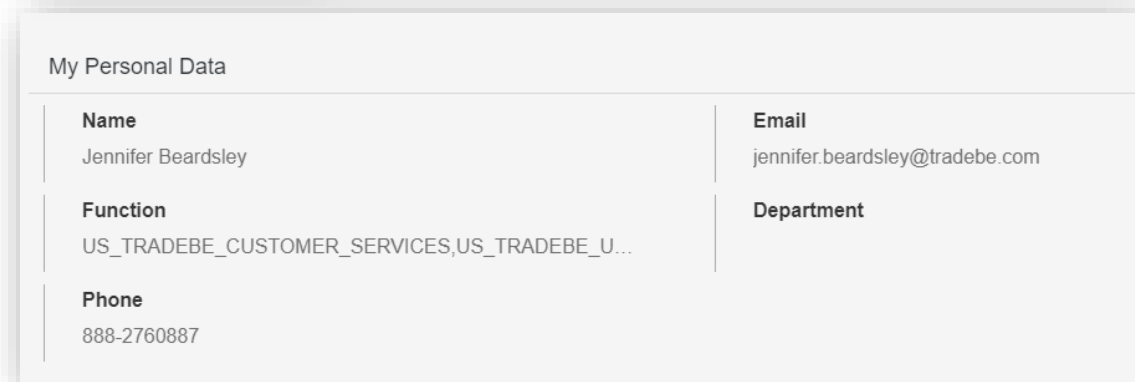
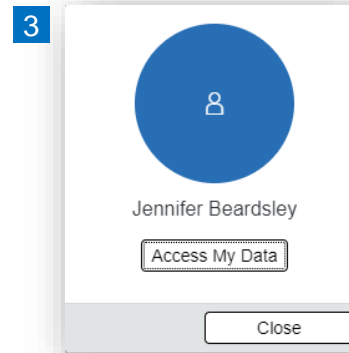
#	Portal Functionality	PDF Guide	Video Guide
1	Home Screen and General Navigation	Link	Link
2	Profiles	Link	Link
3	Orders	Link	Link
4	Invoices	Link	Link
5	My Customer Data	Link	Link
6	Reporting	Link	Link
7	Change Requests	Link	Link
8	User Management	Link	Link
9	Notifications	Link	Link
10	Request a New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

[Request Help](#) [Close](#)

User Guides covering each Portal Functionality are available here. Additional help can be requested through the “Request Help” button.






Additional Features

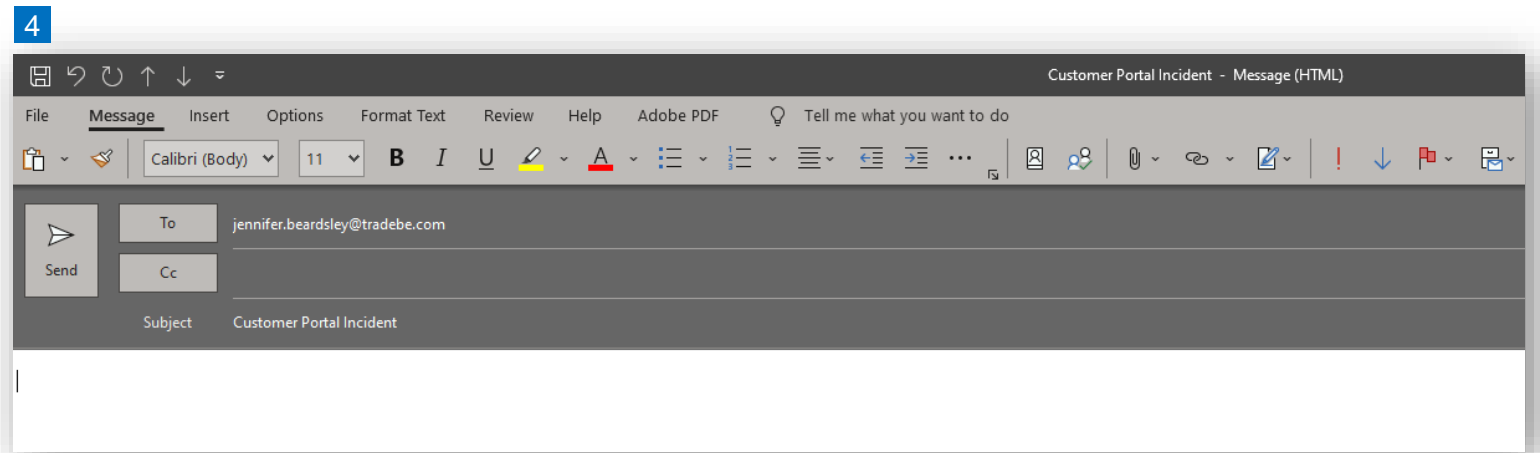
- 1 Notifications 
- 2 User Guides / Help 
- 3 Access My Data 
- 4 Report an Incident 
- 5 Give Feedback 



View Log In Email address as well as Selected “User Access Roles”.






Additional Features

- 1 Notifications 
- 2 User Guides / Help 
- 3 Access My Data 
- 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.

Additional Features

- 1 Notifications 
- 2 User Guides / Help 
- 3 Access My Data 
- 4 Report an Incident 
- 5 Give Feedback 

5

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.

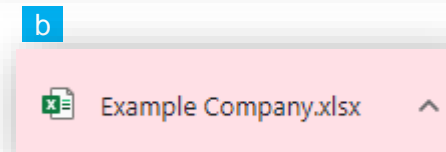
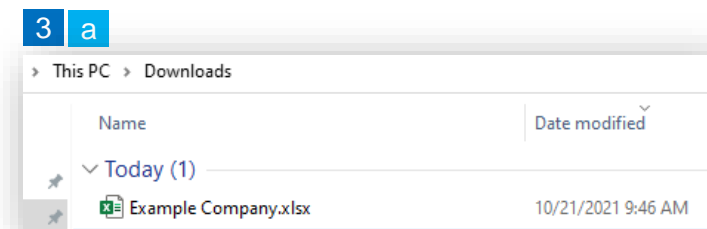
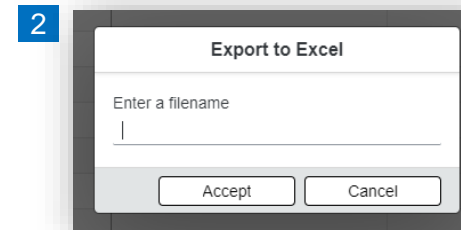
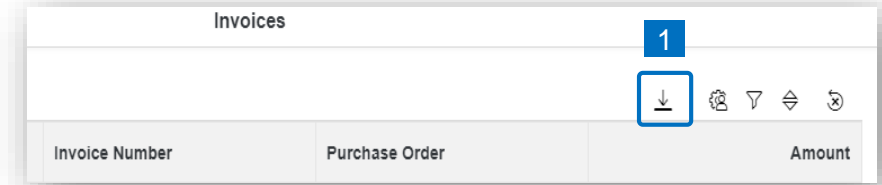
OK

* 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

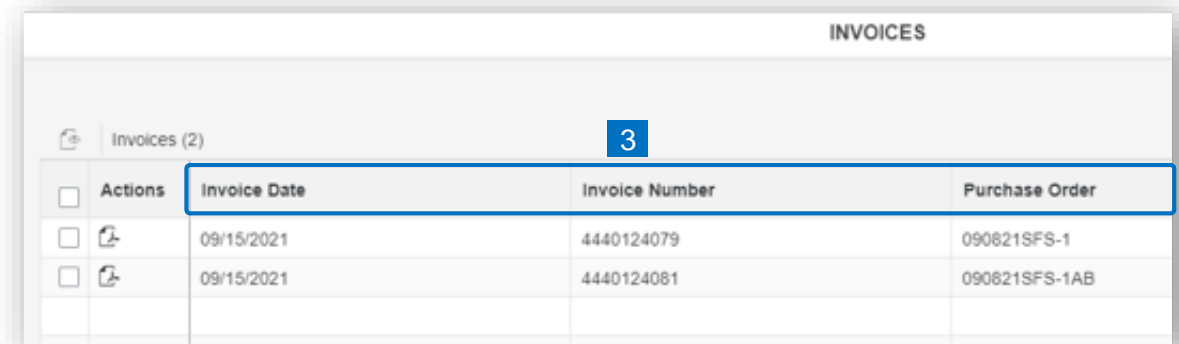
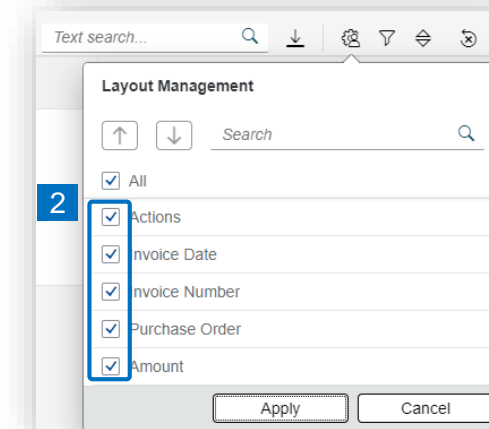
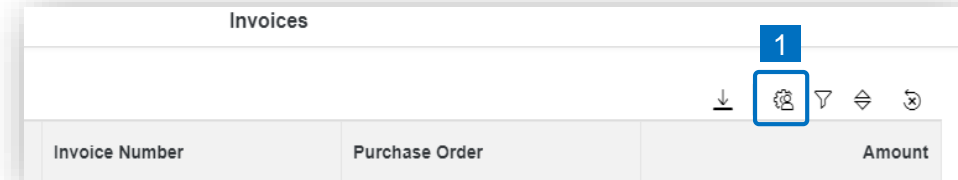
- 1** Export lists to Excel by clicking on the download button  .
- 2** Enter a File Name in the pop-up to save the document in your computer.
- 3** The file will save in your computer in the 'Downloads' folder. **a**
It will also appear at the bottom-left of your screen when completed. **b**



Common Actions | Available In All Functionalities (2)

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.

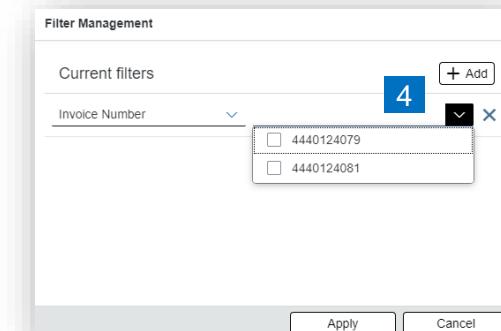
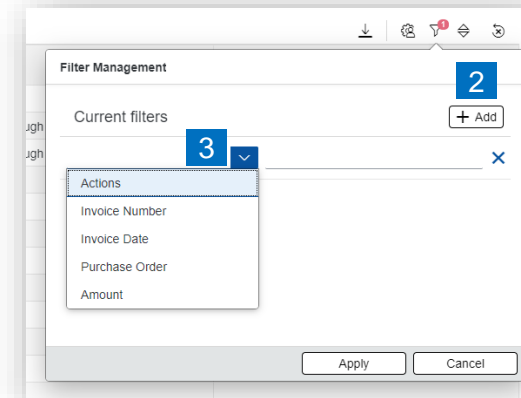
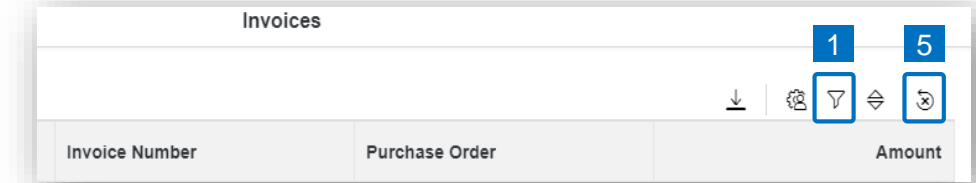


	Actions	Invoice Date	Invoice Number	Purchase Order
<input type="checkbox"/>		09/15/2021	4440124079	090621SFS-1
<input type="checkbox"/>		09/15/2021	4440124081	090621SFS-1AB

Common Actions | Available In All Functionalities (3)

Filter Lists

- 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 .



Sort Lists

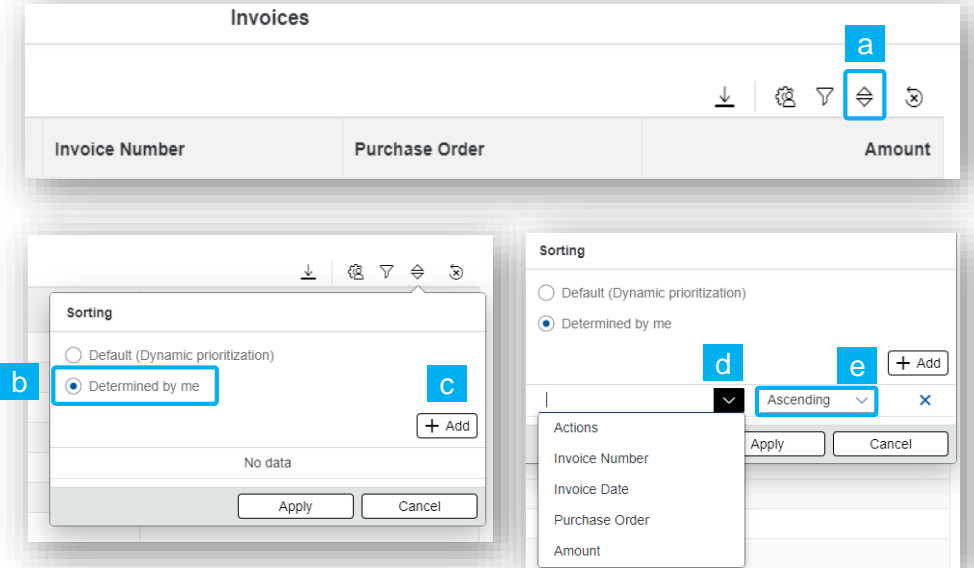
1 Sorting “Option 1”:

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

2 Sorting “Option 2”:

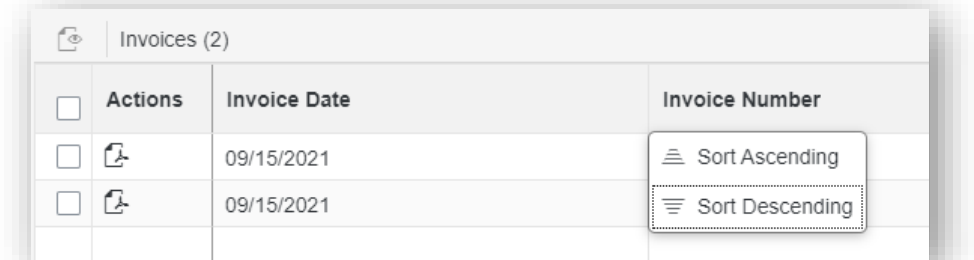
Right click on the header of the column to sort by and select either ascending or descending.

1



The screenshot shows the 'Invoices' table with columns 'Invoice Number', 'Purchase Order', and 'Amount'. A sorting dialog box is open, showing 'Determined by me' selected. A dropdown menu is open over the 'Amount' column header, showing 'Ascending' selected. The dialog box has 'Apply' and 'Cancel' buttons.

2



The screenshot shows the 'Invoices (2)' table with columns 'Actions', 'Invoice Date', and 'Invoice Number'. A context menu is open over the 'Invoice Number' column header, showing 'Sort Ascending' and 'Sort Descending' options.










Actions	Invoice Date	Invoice Number
<input type="checkbox"/>	09/15/2021	
<input type="checkbox"/>	09/15/2021	

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	<i>This guide</i>
 Profiles	Link
 Orders	Link
 Invoices	Link
 My Customer Data	Link
 Change Requests	Link
 Reporting	Link
 Notifications	Link
 Request a New User	Link



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