



TRADEBE CUSTOMER PORTAL

Connecting your needs

User Guide



Home Screen & General Navigation



TRADEBE
Sustainability at Work

Preferred Browser: Google Chrome

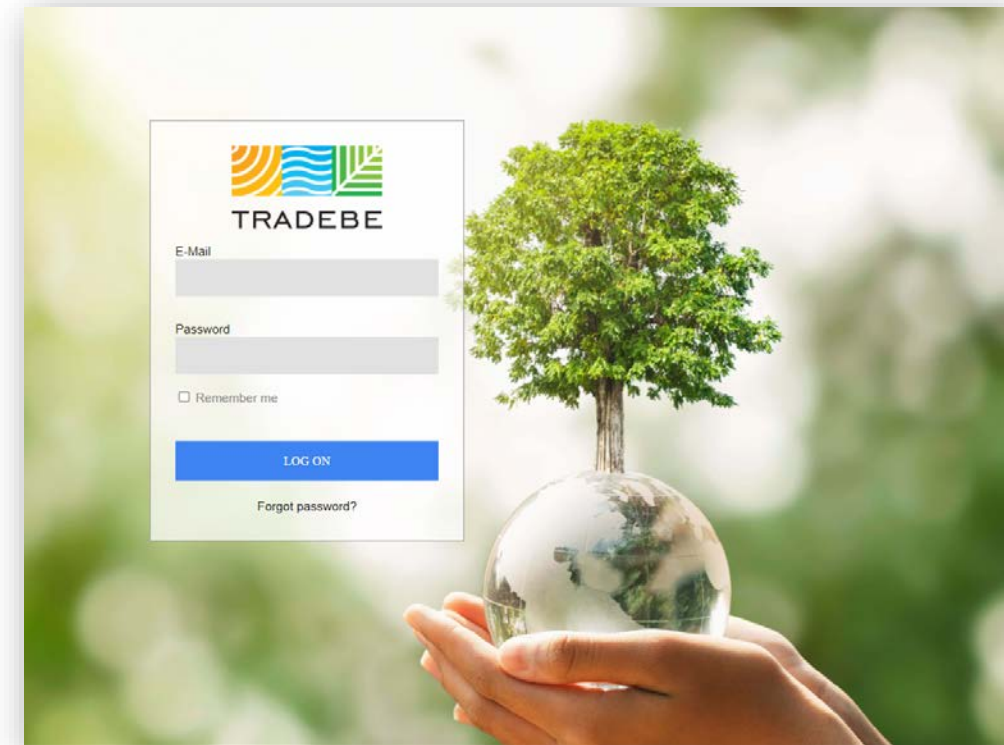
Link:

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

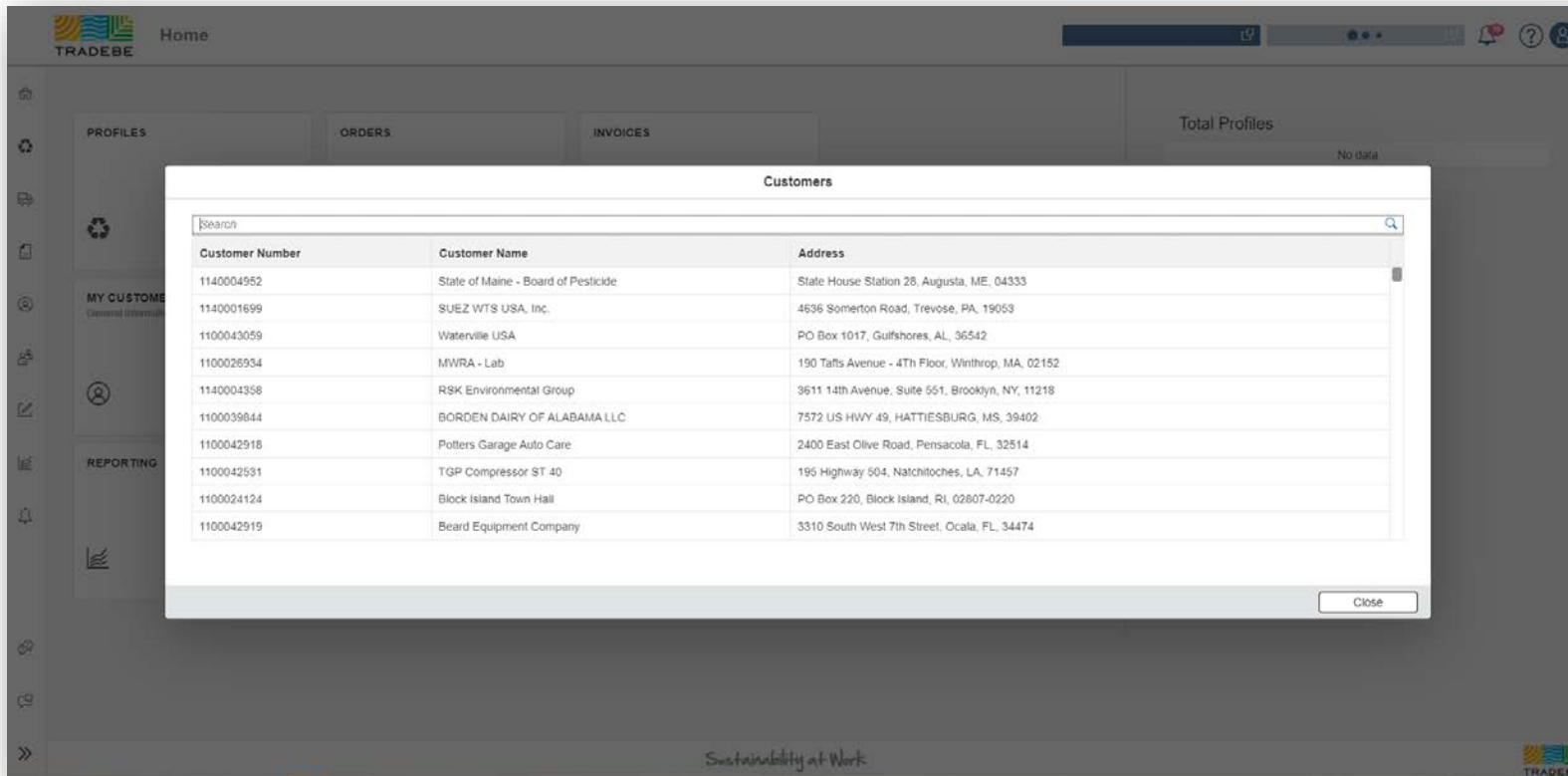
Tip: add a bookmark in your browser.

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 shows the TRADEBE Home Screen interface. A modal window titled 'Customers' is open, displaying a table with the following data:

Customer Number	Customer Name	Address
1140004952	State of Maine - Board of Pesticide	State House Station 28, Augusta, ME, 04333
1140001699	SUEZ WTS USA, Inc.	4636 Somerton Road, Treose, PA, 19053
1100043059	Waterville USA	PO Box 1017, Gulfshores, AL, 36542
1100026934	MWRA - Lab	190 Tafts Avenue - 4Th Floor, Winthrop, MA, 02152
1140004358	RSK Environmental Group	3611 14th Avenue, Suite 551, Brooklyn, NY, 11218
1100039844	BORDEN DAIRY OF ALABAMA LLC	7572 US HWY 49, HATTIESBURG, MS, 39402
1100042918	Potters Garage Auto Care	2400 East Olive Road, Pensacola, FL, 32514
1100042531	TGP Compressor ST 40	195 Highway 504, Natchitoches, LA, 71457
1100024124	Block Island Town Hall	PO Box 220, Block Island, RI, 02807-0220
1100042919	Beard Equipment Company	3310 South West 7th Street, Ocala, FL, 34474

The modal window also includes a search bar at the top and a 'Close' button at the bottom right. The background shows the main interface with tabs for PROFILES, ORDERS, and INVOICES, and a sidebar with options like MY CUSTOMER and REPORTING.

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

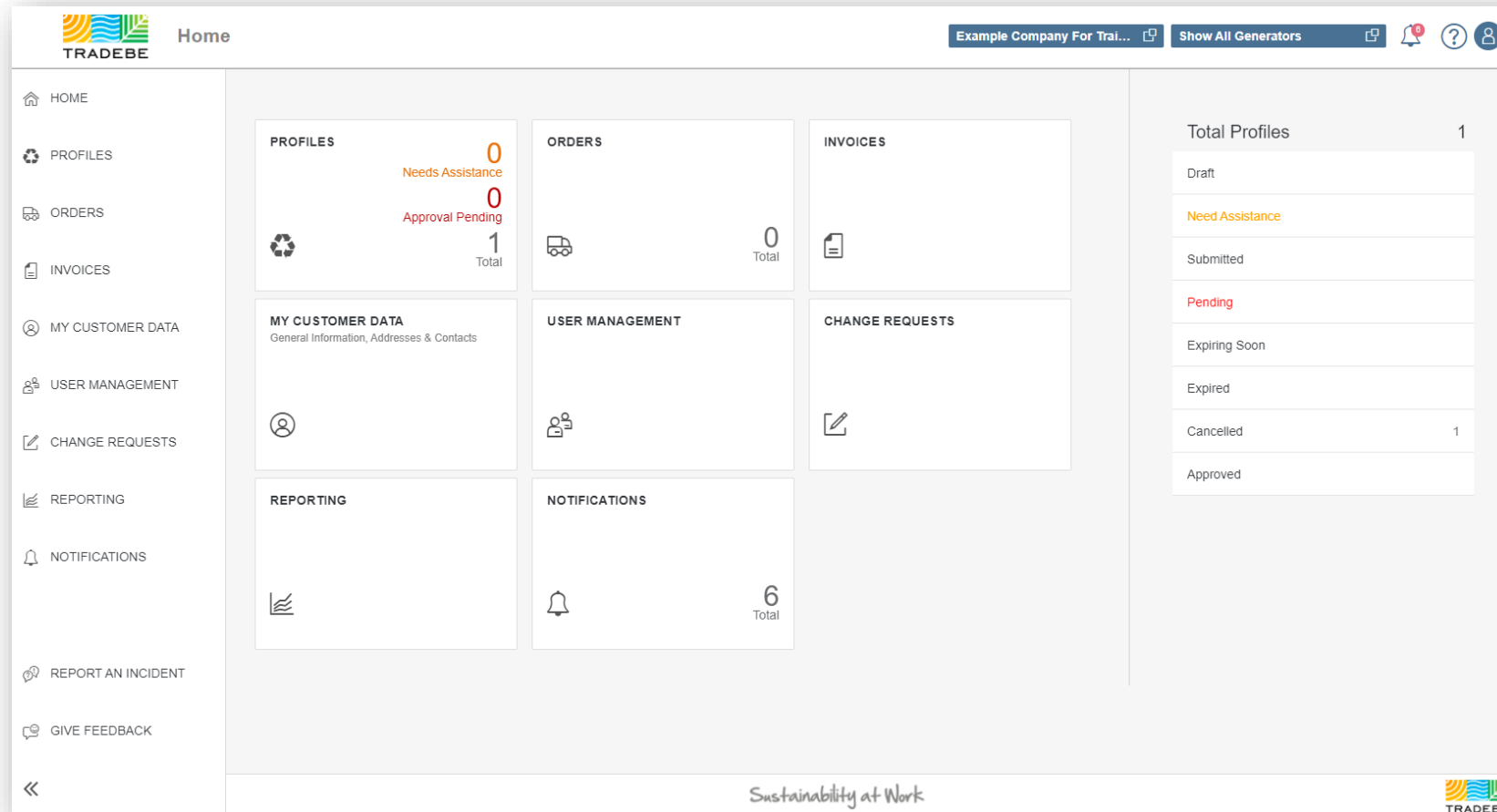
b

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. The interface includes a top navigation bar with the TRADEBE logo, the word "Home", and a company name "Example Company For Tra...". A "Show All Generators" button is also present. A left sidebar lists navigation options: HOME, PROFILES, ORDERS, INVOICES, MY CUSTOMER DATA, USER MANAGEMENT, CHANGE REQUESTS, REPORTING, NOTIFICATIONS, REPORT AN INCIDENT, and GIVE FEEDBACK. The main dashboard area is divided into several sections:

- PROFILES:** Shows 0 Needs Assistance, 0 Approval Pending, and 1 Total.
- ORDERS:** Shows 0 Total.
- INVOICES:** Shows 0 Total.
- MY CUSTOMER DATA:** General information, Addresses & Contacts.
- USER MANAGEMENT:** Shows 0 Total.
- CHANGE REQUESTS:** Shows 0 Total.
- REPORTING:** Shows 0 Total.
- NOTIFICATIONS:** Shows 6 Total.

On the right side, there is a "Total Profiles" summary table:

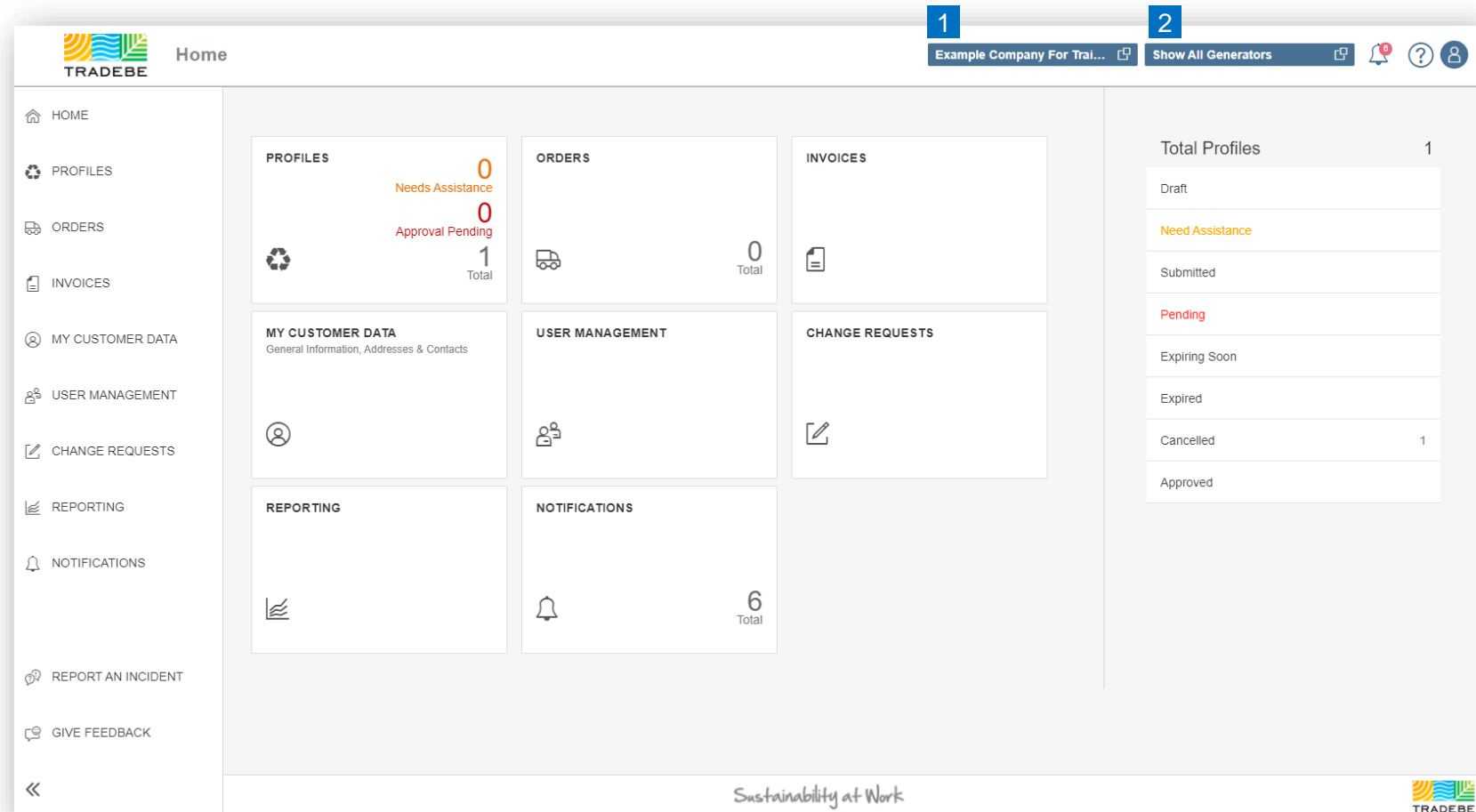
Total Profiles	1
Draft	
Need Assistance	
Submitted	
Pending	
Expiring Soon	
Expired	
Cancelled	1
Approved	

The bottom of the screen features 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.



The screenshot shows the TRADEBE Home Screen. At the top left is the TRADEBE logo and the word "Home". At the top right, there is a header area with a blue bar containing "Example Company For Trai...", "Show All Generators", and icons for notifications, help, and user profile. A blue box with the number "1" is positioned above the company name, and a blue box with the number "2" is positioned above the "Show All Generators" button.

The main content area is divided into a left sidebar and a main grid. The sidebar contains the following menu items: HOME, PROFILES, ORDERS, INVOICES, MY CUSTOMER DATA, USER MANAGEMENT, CHANGE REQUESTS, REPORTING, NOTIFICATIONS, REPORT AN INCIDENT, and GIVE FEEDBACK. The main grid contains several cards: PROFILES (0 Needs Assistance, 0 Approval Pending, 1 Total), ORDERS (0 Total), INVOICES, MY CUSTOMER DATA (General Information, Addresses & Contacts), USER MANAGEMENT, CHANGE REQUESTS, REPORTING, and NOTIFICATIONS (6 Total). On the right side, there is a "Total Profiles" section with a list of profile statuses: Draft, Need Assistance, Submitted, Pending, Expiring Soon, Expired, Cancelled (1), and Approved.

At the bottom of the screen, the text "Sustainability at Work" is displayed on the left, and the TRADEBE logo is on the right.

Home Screen | Default View

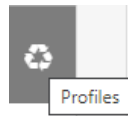


General Navigation

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, the description of the section can be seen by hovering over the icon.



The screenshot displays the TRADEBE Home interface. At the top left is the TRADEBE logo and the word "Home". The top right shows the user's company name "Example Company For Trai...", a "Show All Generators" button, and notification and help icons. A left-hand navigation toolbar is visible, with a blue box around it labeled "1". The main content area features a grid of tiles: "PROFILES" (0 Needs Assistance, 0 Approval Pending, 1 Total), "ORDERS" (0 Total), "INVOICES", "MY CUSTOMER DATA" (General Information, Addresses & Contacts), "USER MANAGEMENT", "CHANGE REQUESTS", "REPORTING", and "NOTIFICATIONS" (6 Total). A right-hand sidebar shows "Total Profiles" (1) and a list of profile statuses: Draft, Need Assistance, Submitted, Pending, Expiring Soon, Expired, Cancelled (1), and Approved. At the bottom left, a blue box labeled "2" points to a double-left arrow icon. The bottom right corner contains the text "Sustainability at Work" and the TRADEBE logo.

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 

2 User Guides / Help 

3 Access My Data 

4 Report an Incident 

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 
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2






User Guide

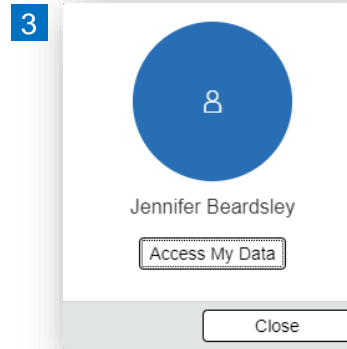
#	Portal Functionality	PDF Guide	Video Guide
1	Home Screen and General Navigation	Link	Link
2	Profiles	Link	Link
3	Orders	Link	Link
4	Invoices	Link	Link
5	My Customer Data	Link	Link
6	Reporting	Link	Link
7	Change Requests	Link	Link
8	User Management	Link	Link
9	Notifications	Link	Link
10	Request a New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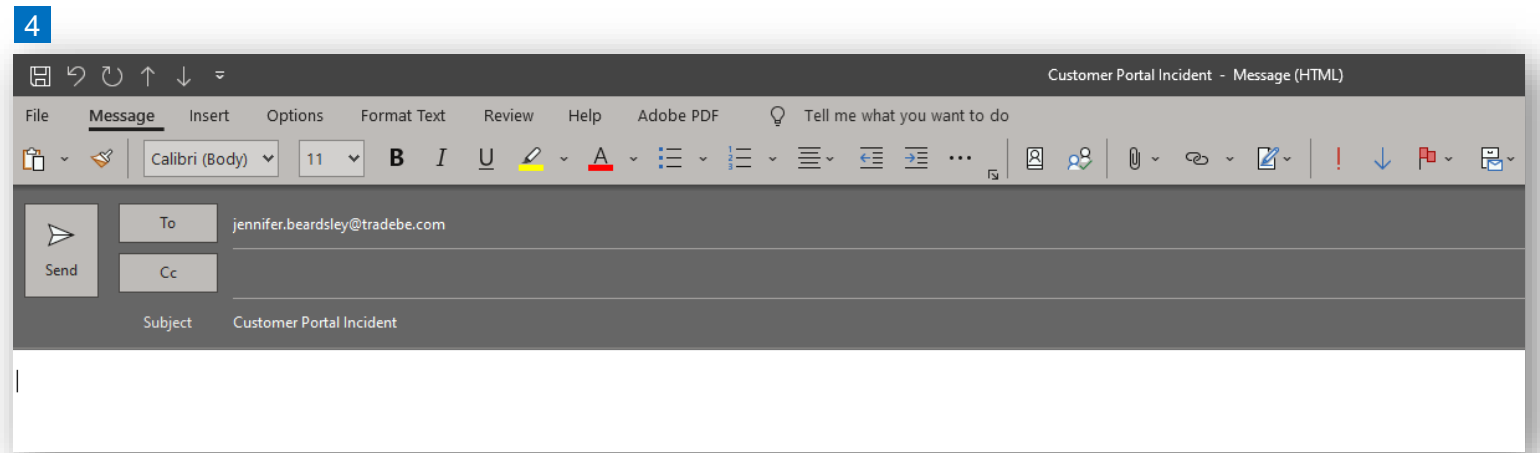


My Personal Data	
Name Jennifer Beardsley	Email jennifer.beardsley@tradebe.com
Function US_TRADEBE_CUSTOMER_SERVICES,US_TRADEBE_U...	Department
Phone 888-2760887	

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 
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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.

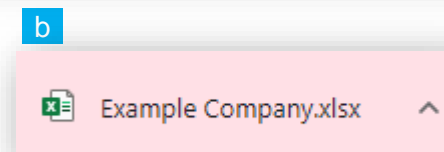
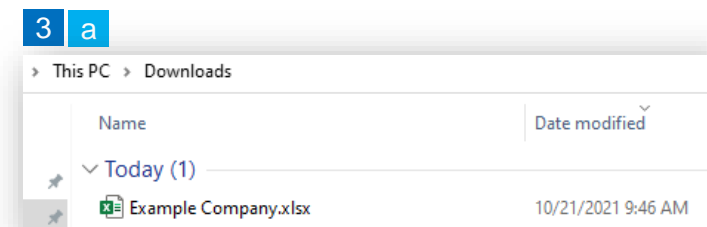
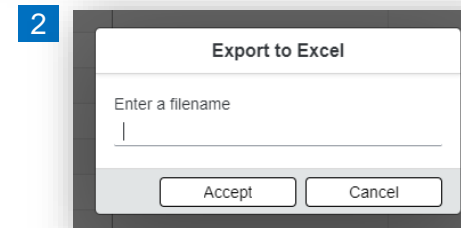
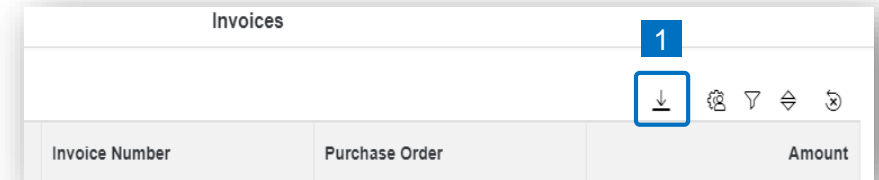
OK

* 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.

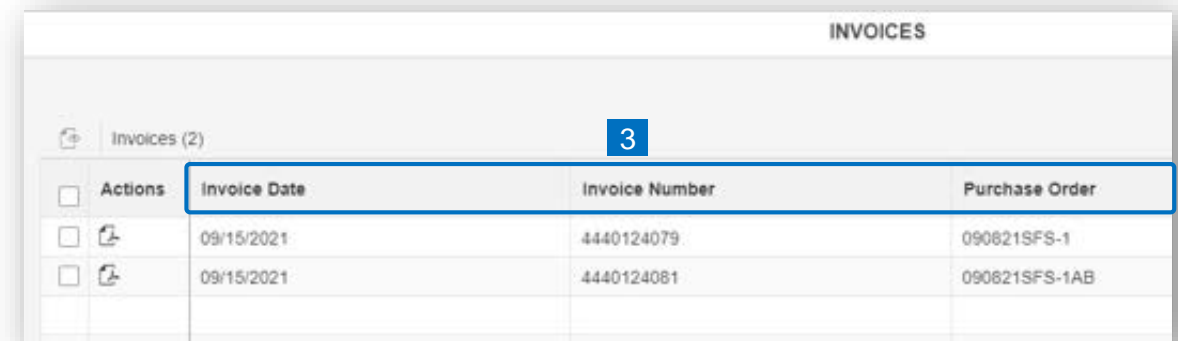
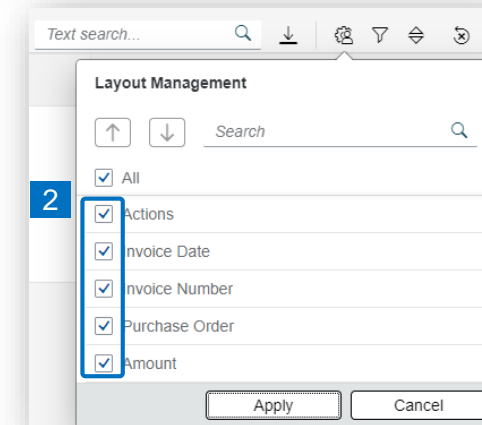
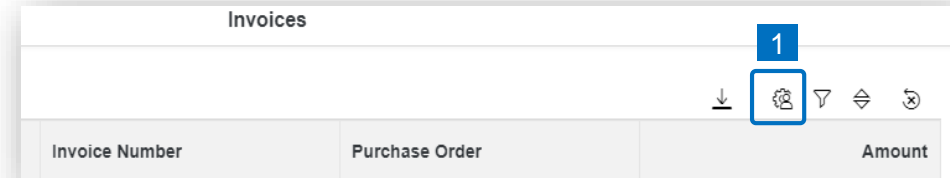
Export List Views to Excel

- 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**






Manage Layout Of List Views

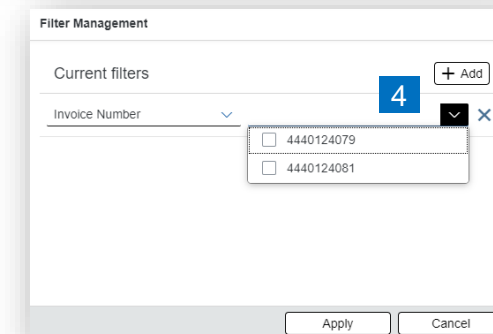
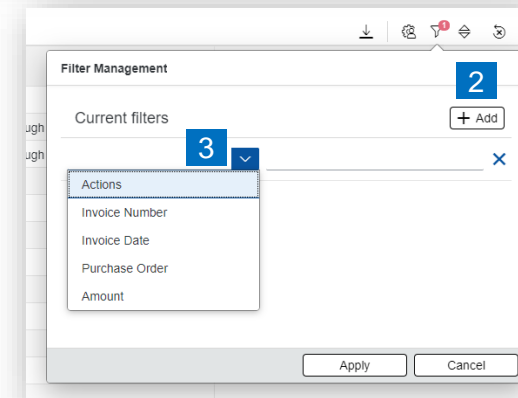
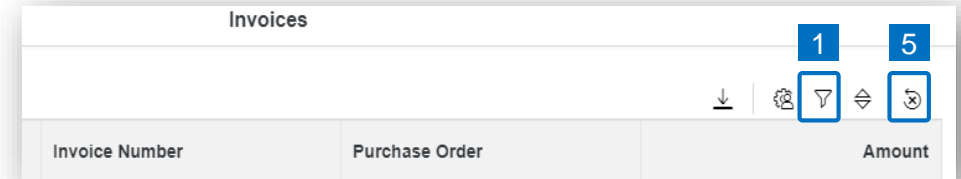
- 1** Select the 'Layout Management' icon. 
- 2** The selected check boxes will show as columns on the List View.
- 3** Reorder columns on the List View, by selecting the column header and dragging left or right.



INVOICES				
Invoices (2)				
<input type="checkbox"/>	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

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 .



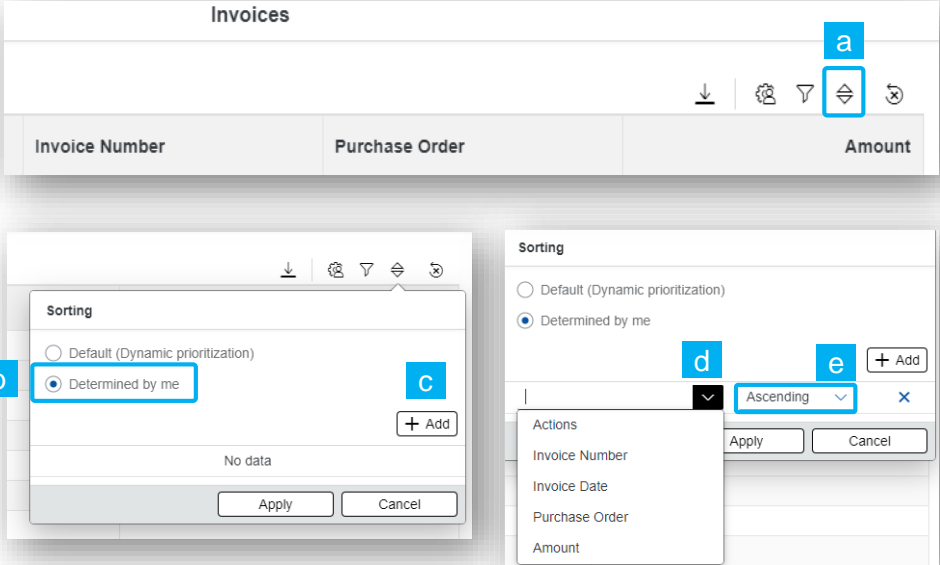
Sort Lists

- 1** **Sorting “Option 1”:**
 - 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.

1



The screenshot shows the 'Invoices' table with columns 'Invoice Number', 'Purchase Order', and 'Amount'. A sorting dialog is open, showing 'Determined by me' selected and 'Ascending' chosen. A dropdown menu is open over the 'Amount' column header, showing options like 'Actions', 'Invoice Number', 'Invoice Date', 'Purchase Order', and 'Amount'.

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 options for 'Sort Ascending' and 'Sort 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	<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



TRADEBE

Sustainability at Work

www.tradebeusa.com

