



# TRADEBE CUSTOMER PORTAL

*Connecting your needs*

## User Guide

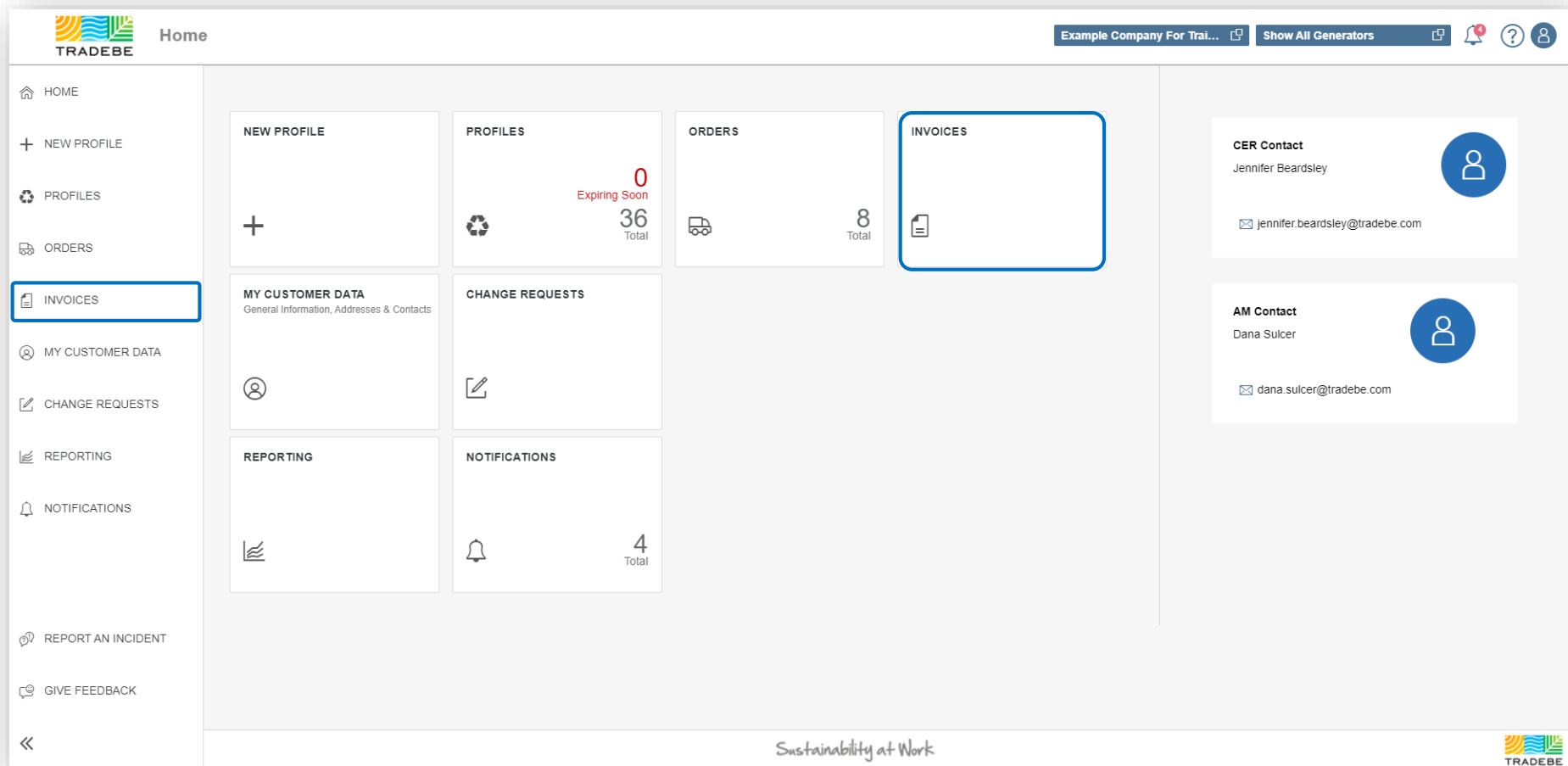
 Invoices



**TRADEBE**

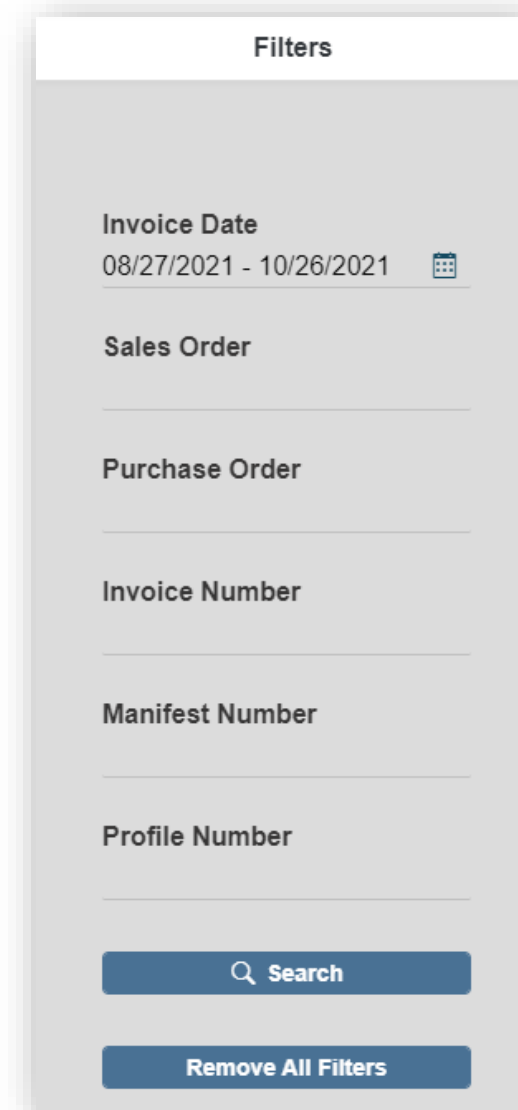
*Sustainability at Work*

## 1 Select Invoices Either from the left tool bar or the tile on the Home Screen.



The screenshot displays the TRADEBE Home interface. The top navigation bar includes the TRADEBE logo, the word "Home", and user information for "Example Company For Trai...". The left sidebar contains a list of navigation options: HOME, NEW PROFILE, PROFILES, ORDERS, INVOICES (highlighted with a blue box), MY CUSTOMER DATA, CHANGE REQUESTS, REPORTING, NOTIFICATIONS, REPORT AN INCIDENT, and GIVE FEEDBACK. The main dashboard area features several tiles: "NEW PROFILE" with a plus icon, "PROFILES" showing 0 Expiring Soon and 36 Total, "ORDERS" showing 8 Total, "INVOICES" (highlighted with a blue box), "MY CUSTOMER DATA" (General Information, Addresses & Contacts), "CHANGE REQUESTS", "REPORTING", and "NOTIFICATIONS" showing 4 Total. On the right side, there are contact cards for "CER Contact" (Jennifer Beardley, jennifer.beardsley@tradebe.com) and "AM Contact" (Dana Sulcer, dana.sulcer@tradebe.com). The bottom of the screen features the slogan "Sustainability at Work" and the TRADEBE logo.










- 1 Select Invoice 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 mobile application interface for filtering invoices. The modal is titled "Filters" and contains several input fields and buttons. The "Invoice Date" field is pre-filled with "08/27/2021 - 10/26/2021" and has a calendar icon. Below it are empty input fields for "Sales Order", "Purchase Order", "Invoice Number", "Manifest Number", and "Profile Number". At the bottom, there are two buttons: "Search" with a magnifying glass icon and "Remove All Filters".










**1** From the list view, to open one invoice click on the .pdf icon  .

**2** To open multiple invoices, check the boxes  on the desired line item(s), then click on the view icon .

INVOICES					
 Invoices (2)	Text search...				     
<input type="checkbox"/> Actions	Invoice Date	Invoice Number	Purchase Order		Amount
<input type="checkbox"/> 	09/15/2021	4440124079	090821SFS-1		\$1,767.25
<input type="checkbox"/> 	09/15/2021	4440124081	090821SFS-1AB		\$1,744.50

**3** To open all invoices at once check the top box

**4** Once selected, click on the view icon 

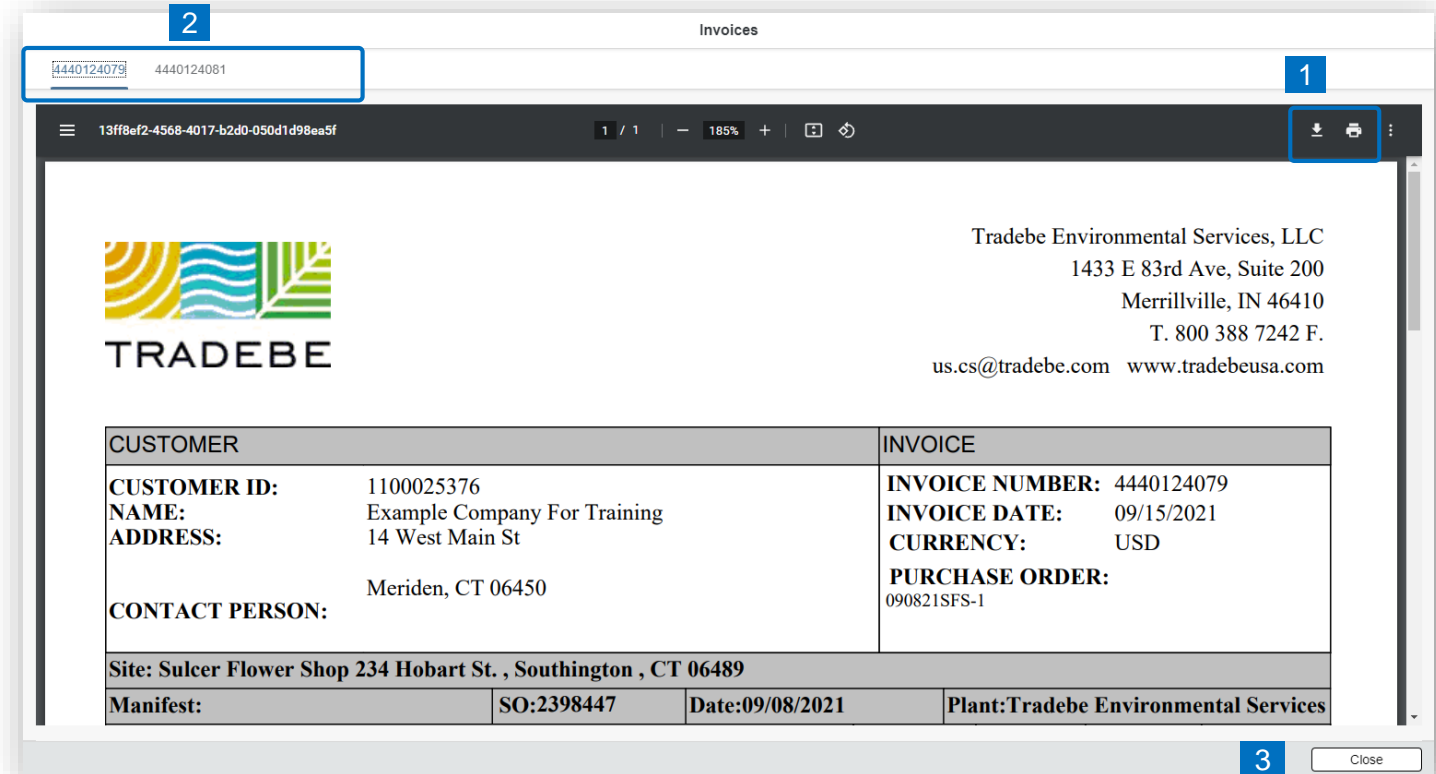
INVOICES					
 Invoices (2 Total: 2 Selected)		<input type="text" value="Text search..."/>      			
<input checked="" type="checkbox"/>	Actions	Invoice Date	Invoice Number	Purchase Order	Amount
<input checked="" type="checkbox"/>		09/15/2021	4440124079	090821SFS-1	\$1,767.25
<input checked="" type="checkbox"/>		09/15/2021	4440124081	090821SFS-1AB	\$1,744.50

## 1 Invoice View actions:

- Download
- Print

2 When multiple invoices are selected, toggle using the invoice number at the top.


3 Close to go back to the invoice list view.

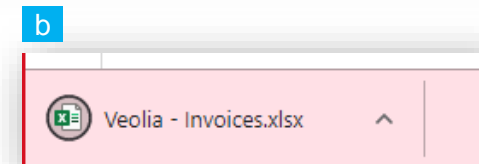
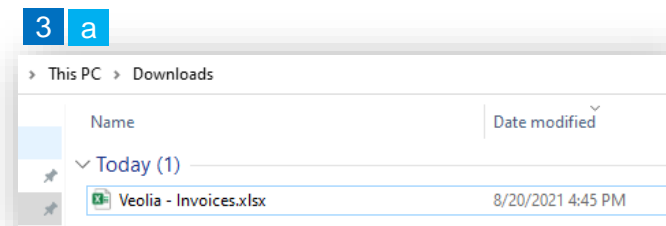
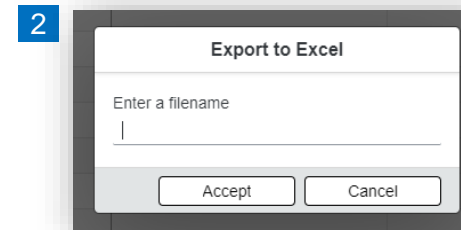
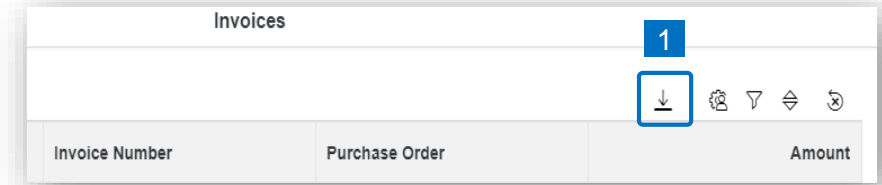


The screenshot shows a web application window titled "Invoices". At the top, there is a search bar containing the invoice number "4440124079" and another number "4440124081". A blue box labeled "2" highlights the search bar. On the right side of the top bar, there is a blue box labeled "1" containing download and print icons. The main content area features the TRADEBE logo on the left and company contact information on the right. Below this is a table with customer and invoice details. At the bottom right, there is a blue box labeled "3" containing a "Close" button.


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

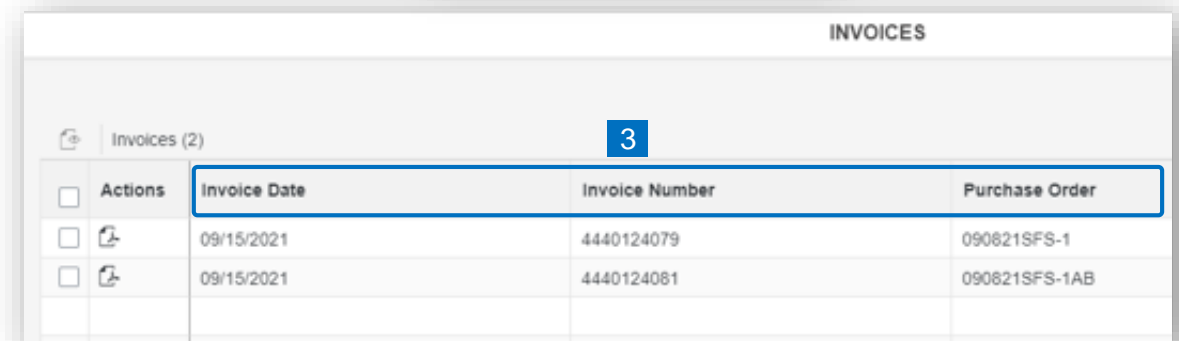
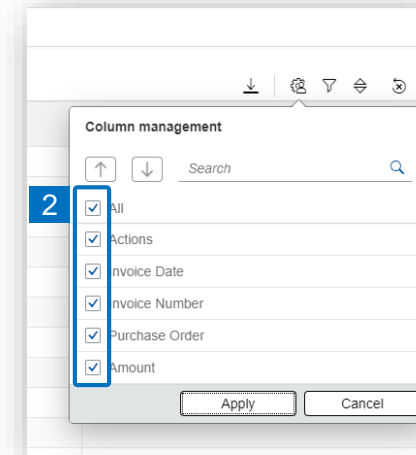
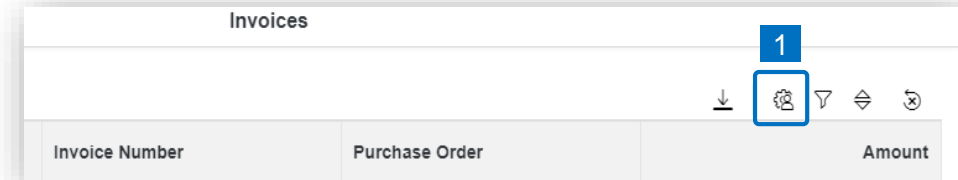
## Export Invoice List

- 1** Export invoice 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.






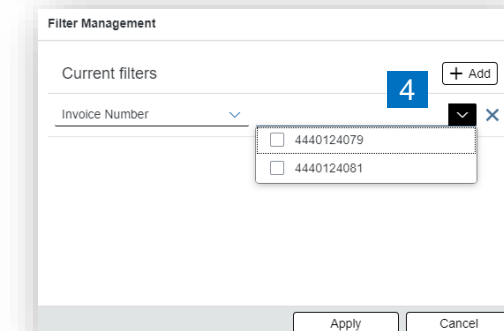
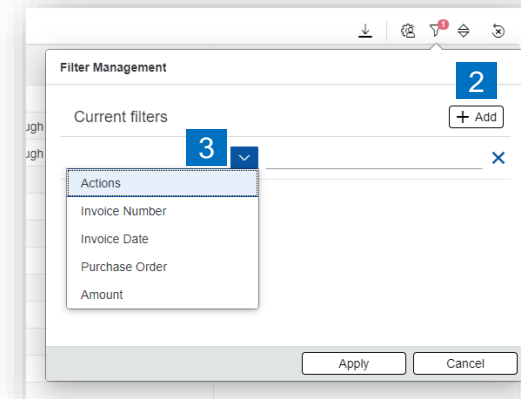
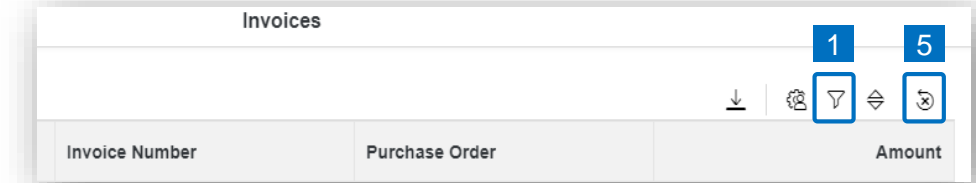
The screenshot shows the 'INVOICES' list view after the columns have been reordered. The table has a header row with columns: 'Actions', 'Invoice Date', 'Invoice Number', and 'Purchase Order'. The 'Invoice Date' header is highlighted with a blue box and the number 3. Below the header, there are two rows of data:

	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



## 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

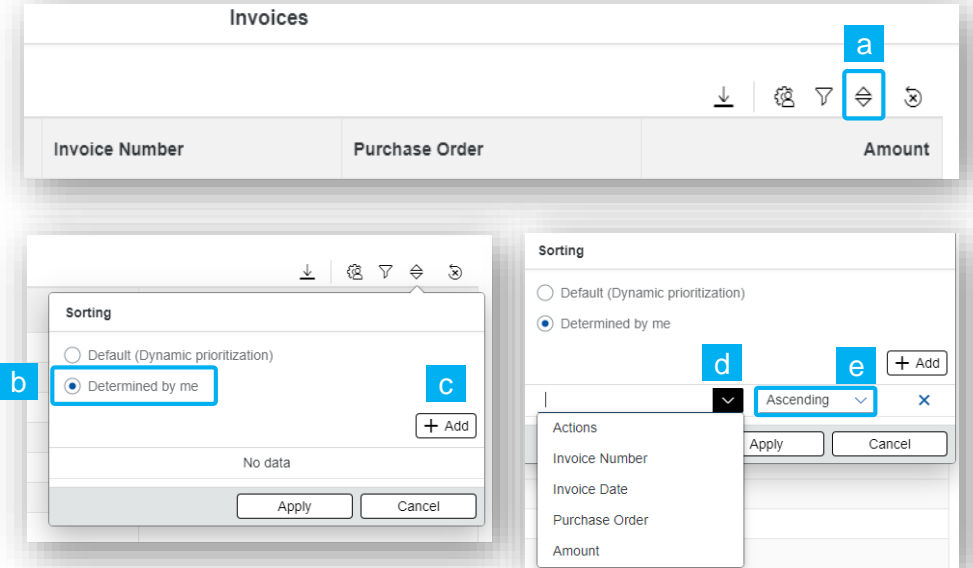
### 1 Sorting “Option 1”:

- 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



The screenshot shows the 'Invoices' table with columns 'Invoice Number', 'Purchase Order', and 'Amount'. A sorting menu is open over the 'Amount' column, showing options for 'Ascending' and 'Descending'. A 'Sorting' dialog box is also open, showing 'Determined by me' selected and 'Ascending' chosen as the sorting order.

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'.










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](mailto:adminportal@tradebe.com)*

# Access To Other User Guides

Portal Functionality	PDF Guide
 Home Screen	<a href="#">Link</a>
 Profiles	<a href="#">Link</a>
 Orders	<a href="#">Link</a>
 <b>Invoices</b>	<i>This guide</i>
 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>



**TRADEBE**

*Sustainability at Work*

[www.tradebeusa.com](http://www.tradebeusa.com)

