

New Customer Portal

Step-By-Step Guide



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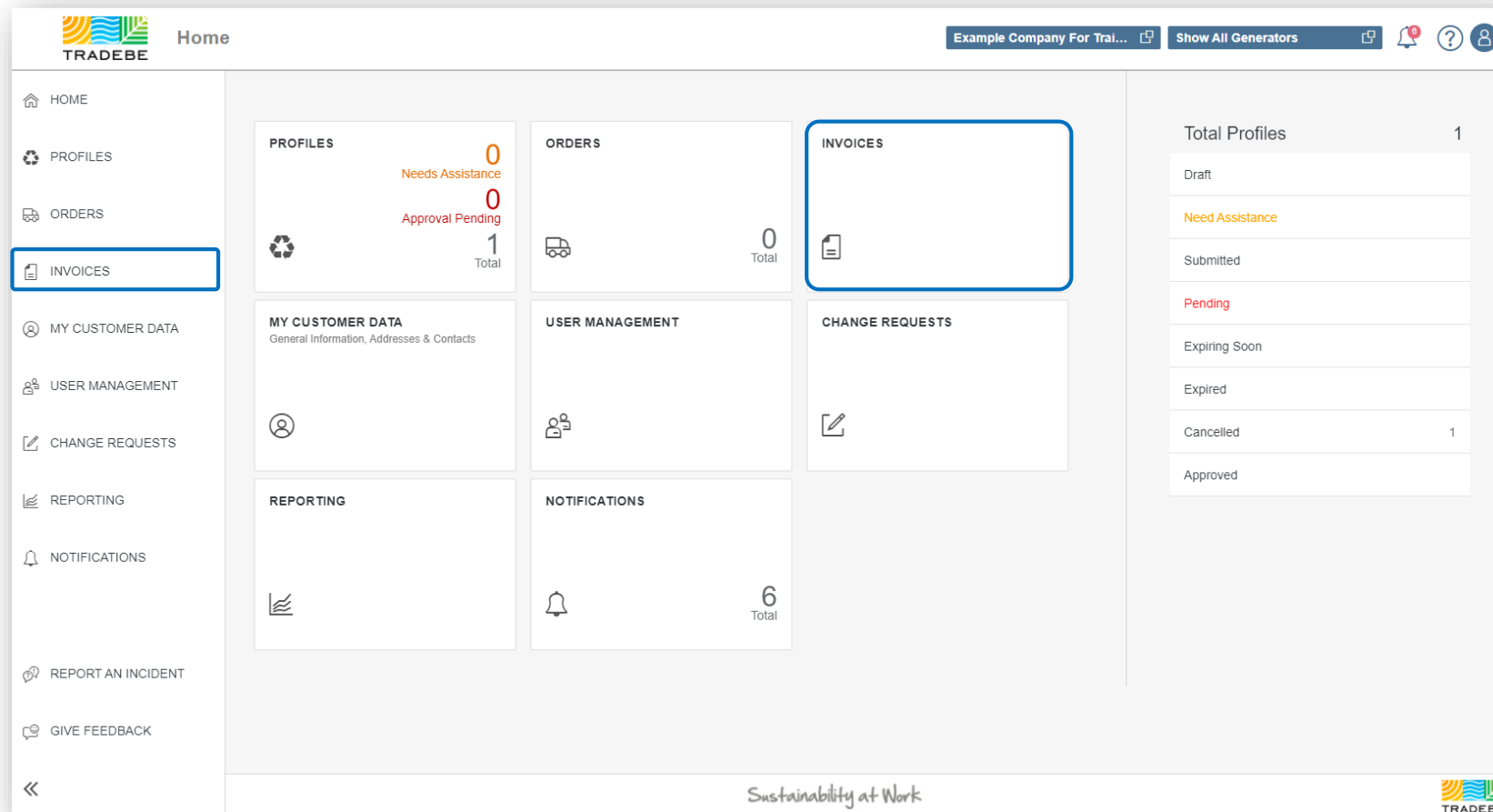
Invoices

Step-By-Step Guide



TRADEBE

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




The screenshot shows the TRADEBE Home screen. The left sidebar contains a list of navigation options: HOME, PROFILES, ORDERS, INVOICES (highlighted with a blue box), MY CUSTOMER DATA, USER MANAGEMENT, CHANGE REQUESTS, REPORTING, NOTIFICATIONS, REPORT AN INCIDENT, and GIVE FEEDBACK. The main dashboard area features several tiles: PROFILES (0 Needs Assistance, 0 Approval Pending, 1 Total), ORDERS (0 Total), INVOICES (highlighted with a blue box), 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' summary table with 1 total profile, broken down into Draft, Need Assistance, Submitted, Pending, Expiring Soon, Expired, Cancelled (1), and Approved.

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

- 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**

Filters

Invoice Date
07/21/2020 - 08/20/2020 


Sales Order

Purchase Order

Invoice Number










Manifest Number

Profile Number

 Search

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 (3)					    
<input type="checkbox"/> Actions	Invoice Date	Invoice Number	Purchase Order		Amount
<input type="checkbox"/> 	07/23/2020	4440123986	OU 36145 Marlboro		\$450.00
<input type="checkbox"/> 	07/22/2020	4440123948	OU 36145 Marlborough		\$6,685.00
<input type="checkbox"/> 	07/22/2020	4440123951	OU 36145 Marlborough		\$1,950.00

3 To open all invoices at once check the top box

4 Once selected, click on the view icon 

INVOICES

Invoices (1522 Total: 1522 Selected) Text search...      

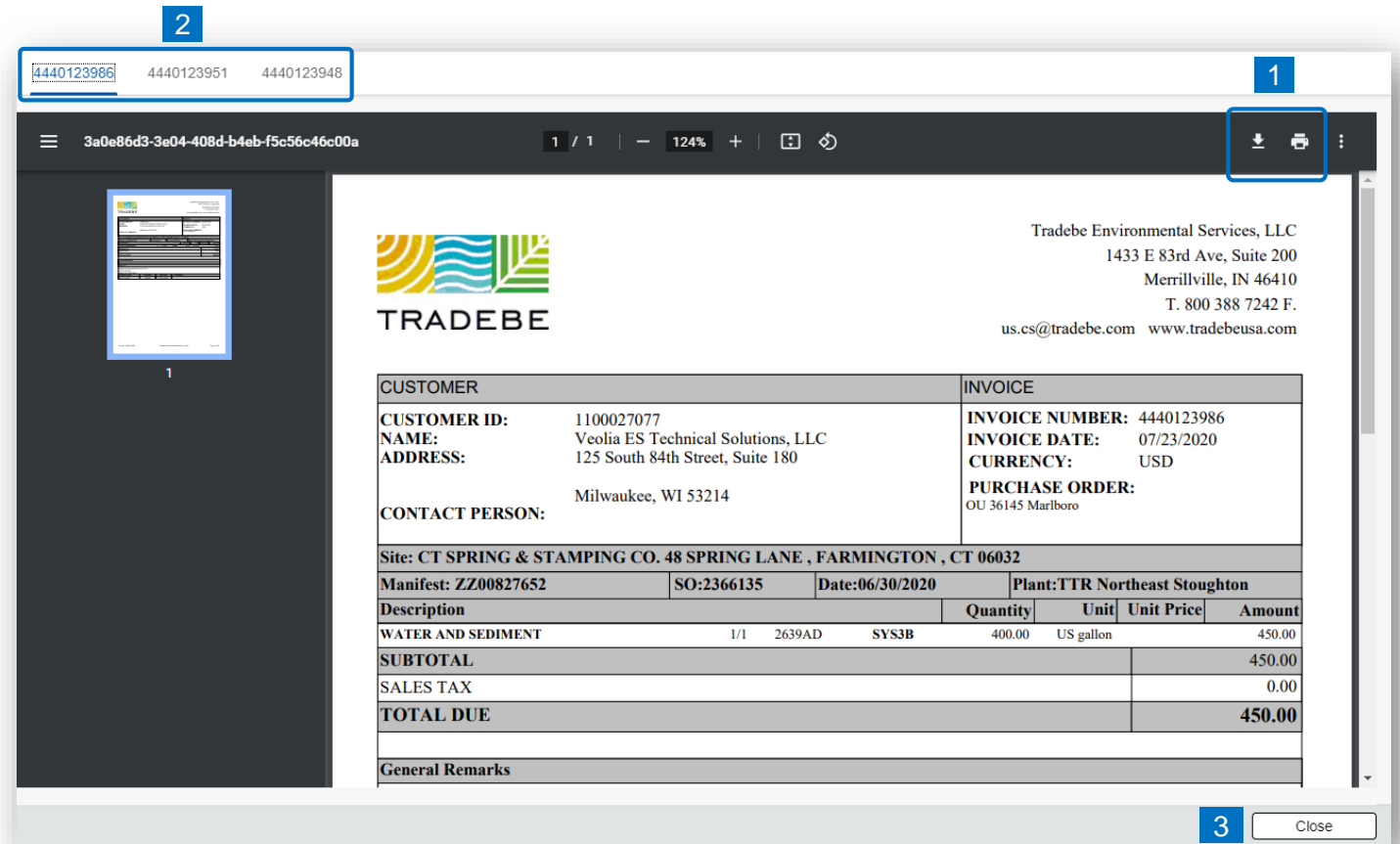
<input checked="" type="checkbox"/>	Actions	Invoice Date	Invoice Number	Purchase Order	Amount
<input checked="" type="checkbox"/>		10/21/2021	4440177859	36055	\$2,362.26
<input checked="" type="checkbox"/>		10/21/2021	4440177860	OU 36145 Marlborough	\$1,950.00
<input checked="" type="checkbox"/>		10/21/2021	4440177861	OU 36145 Marlborough	\$2,145.00
<input checked="" type="checkbox"/>		10/21/2021	4440177862	OU 36145 Marlborough	\$10,622.00
<input checked="" type="checkbox"/>		10/21/2021	4440177863	36055	\$2,383.32

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.

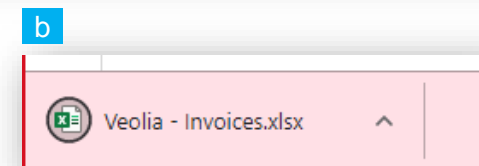
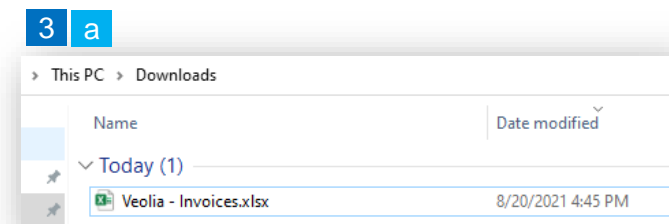
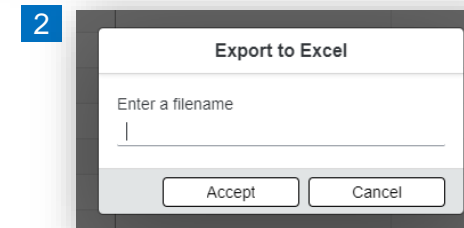
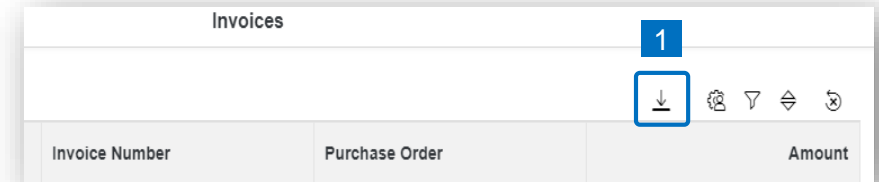


The screenshot shows the Tradebe Invoice View interface. At the top, there is a search bar with the invoice number 4440123986 highlighted. Below the search bar, there are three invoice numbers: 4440123986, 4440123951, and 4440123948. A blue box labeled '2' highlights the search bar area. On the right side of the interface, there are icons for download and print, with a blue box labeled '1' highlighting them. The main content area displays the Tradebe logo and contact information for Trade Environmental Services, LLC. Below this, there is a table with customer and invoice details. At the bottom right, there is a 'Close' button with a blue box labeled '3' highlighting it.


CUSTOMER		INVOICE				
CUSTOMER ID:	1100027077	INVOICE NUMBER:	4440123986			
NAME:	Veolia ES Technical Solutions, LLC	INVOICE DATE:	07/23/2020			
ADDRESS:	125 South 84th Street, Suite 180	CURRENCY:	USD			
	Milwaukee, WI 53214	PURCHASE ORDER:	OU 36145 Marlboro			
CONTACT PERSON:						
Site: CT SPRING & STAMPING CO. 48 SPRING LANE , FARMINGTON , CT 06032						
Manifest: ZZ00827652	SO: 2366135	Date: 06/30/2020	Plant: TTR Northeast Stoughton			
Description	Quantity	Unit	Unit Price	Amount		
WATER AND SEDIMENT	400.00	US gallon		450.00		
SUBTOTAL				450.00		
SALES TAX				0.00		
TOTAL DUE				450.00		
General Remarks						

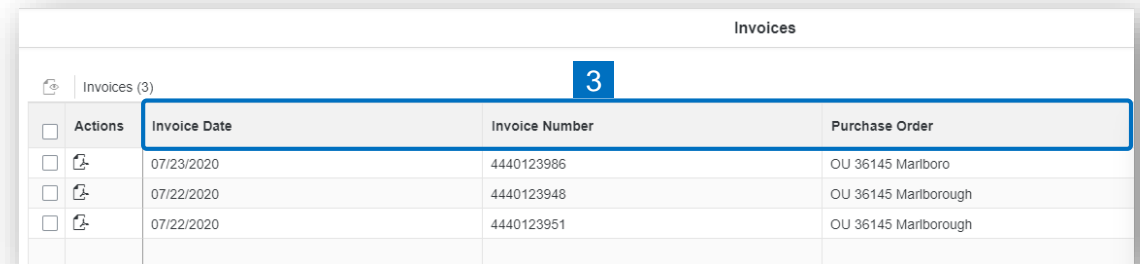
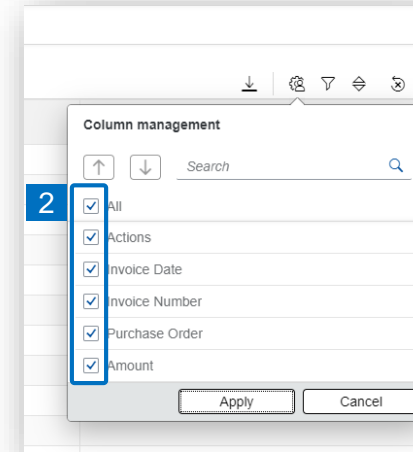
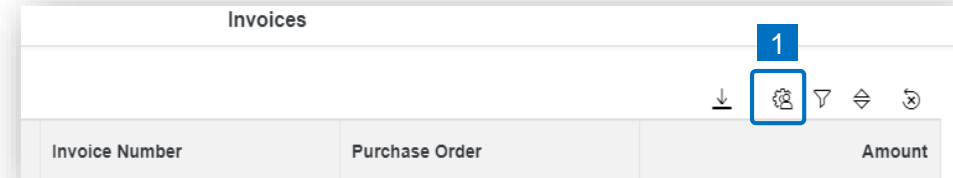
Export Invoice List

- 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

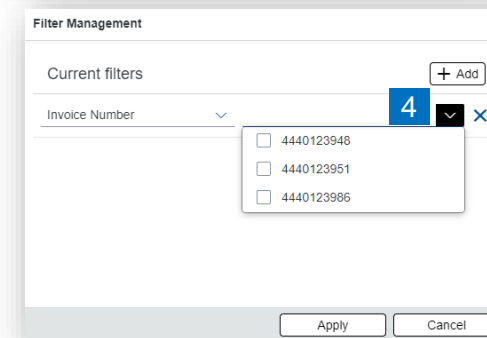
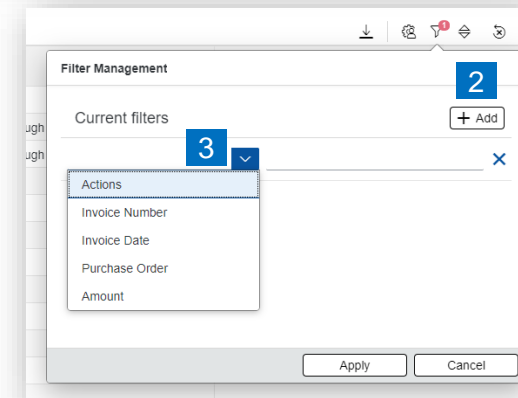
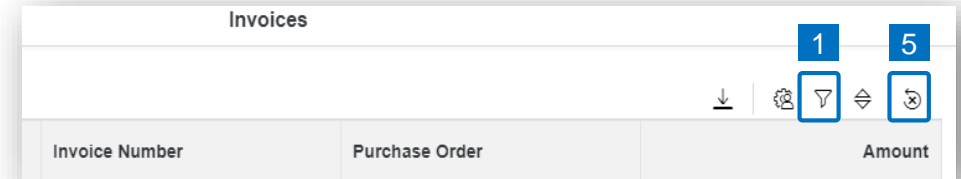
- 1 Select the 'Change Layout' icon .
- 2 The selected check boxes will show as columns on the list view.
- 3 Reorder columns on the list view, by selecting the column header and dragging left or right.



	Actions	Invoice Date	Invoice Number	Purchase Order
<input type="checkbox"/>		07/23/2020	4440123986	OU 36145 Marlboro
<input type="checkbox"/>		07/22/2020	4440123948	OU 36145 Marlborough
<input type="checkbox"/>		07/22/2020	4440123951	OU 36145 Marlborough

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

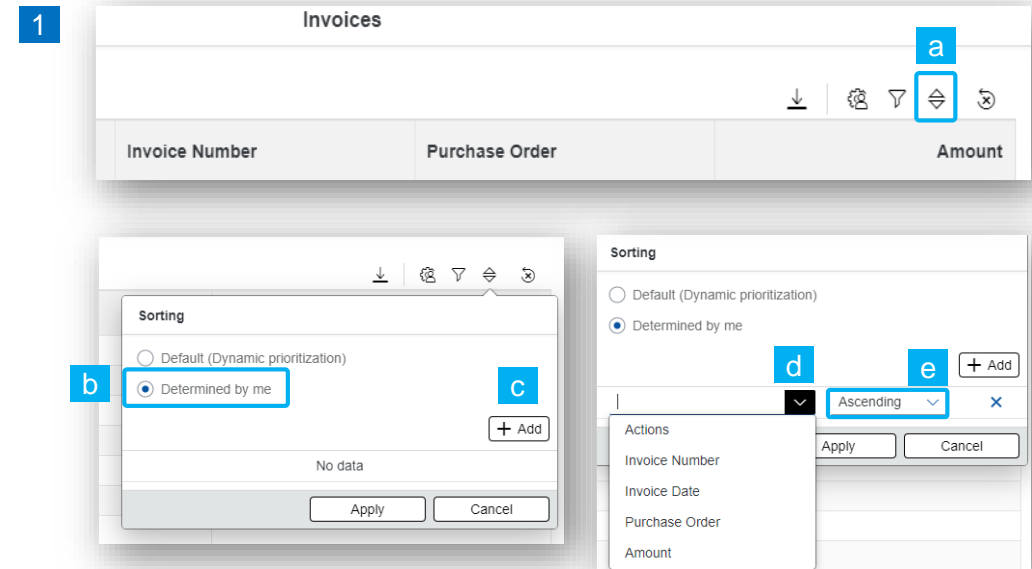
1 Sorting “Option 1”:

- 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



Invoices

Invoice Number	Purchase Order	Amount
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Sorting

Default (Dynamic prioritization)

Determined by me

+ Add

No data

Apply Cancel

Sorting

Default (Dynamic prioritization)

Determined by me

+ Add

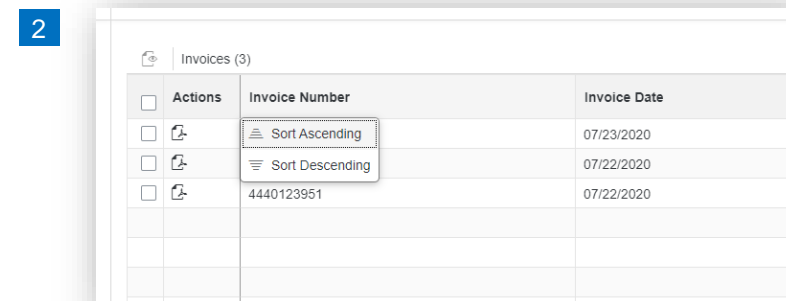
Ascending

Apply Cancel

Actions

- Invoice Number
- Invoice Date
- Purchase Order
- Amount

2



Invoices (3)

Actions	Invoice Number	Invoice Date
<input type="checkbox"/>		07/23/2020
<input type="checkbox"/>		07/22/2020
<input type="checkbox"/>	4440123951	07/22/2020