



TRADEBE CUSTOMER PORTAL

Connecting your needs

Getting Started

6 things every user needs to know



TRADEBE

Sustainability at Work

Getting Started (1/2)

Help to log in...

1 How to reset your password

1. Open the login page: <http://customerportal.tradebe.com> (Google Chrome preferred),
2. Select “Forgot password?” under the “LOG ON” button,
3. Check your e-mail inbox for an e-mail from “Tradebe Customer Portal” from the address: donotreply@tradebe.com,
4. Open the e-mail and click on the link provided to set your new password.

First steps after logging in...

2 Prompted to select a customer

The information displayed in the Portal will correspond to the customer selected there. This selection step is critical and cannot be skipped.



Example Company For Tra... Show All Generators

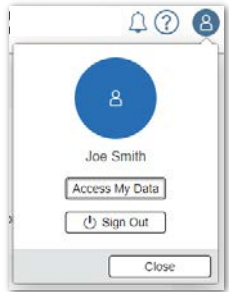
The customer selection can be changed later and at any time, clicking on the customer selection box in the header.

Next to the customer selection box, there is a generator selection box. It will default to “Show All Generators”, but if desired, the user can choose to view only a specific generator.

3 Set up your notification preferences

By default, all notifications will be “ON” for both in-portal and e-mail notifications. These preferences can be changed as follows:

1. Select the “my profile” icon in the top-right, then select “Access My Data”,
2. At the bottom-right, select “Configure Notifications”,
3. Check or uncheck the boxes according to your preferences,
4. Select the “Save” button to update the configuration.



4 Access to user guides

User guides covering each of the functionalities step-by-step can be found in the portal:

1. Open the “Help” section in the top-right, represented with a “?” icon,
2. Select any of the topics to open its corresponding user guide,
3. If further assistance is needed, select “Request Help” to contact your CER.




And two more tips...

5 Date range filters

In all sections where a date range applies (*“Orders”, “Invoices” and “Reporting”*), the date range is defaulted to the last 60 days.

In order to change it:

1. Select the “Filters” icon in the top-left of the selected section  **Filters**
2. Define the desired date range,
3. Select “Search” at the bottom to trigger the update in the results displayed.

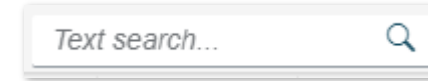
Why this is important?

When users forget this date range filter is on, it is often the reason why they can’t find the data they are looking for.

Additionally, users often forget to select the “Search” button after changing the data range filter.

6 Text search

Most of the sections in the Portal feature a “Text Search” bar.



This bar can be used to quickly search or filter by typing any text when looking for a specific result. The search will include all of the fields displayed on screen.

Why this is important?

While each section in the Portal has the option to apply filters according to one or multiple parameters, this “Text Search” bar is very often the easier and quicker way to look-up a specific document.

Have more questions?

*Contact your Customer Experience Representative
or Account Manager, or e-mail us at adminportal@tradebe.com.*



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