



TRADEBE CUSTOMER PORTAL

Connecting your needs

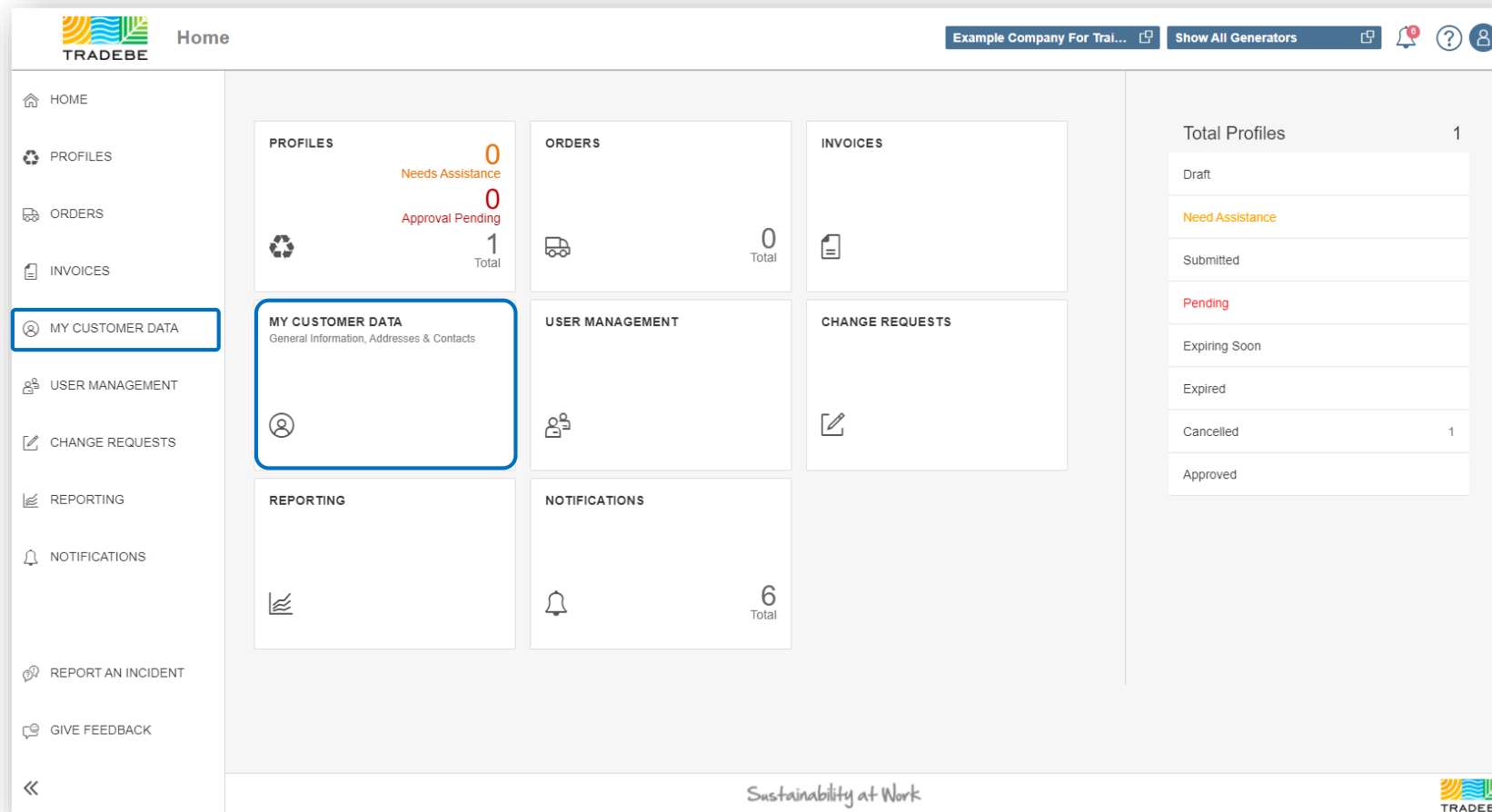
User Guide

 My Customer Data



TRADEBE
Sustainability at Work

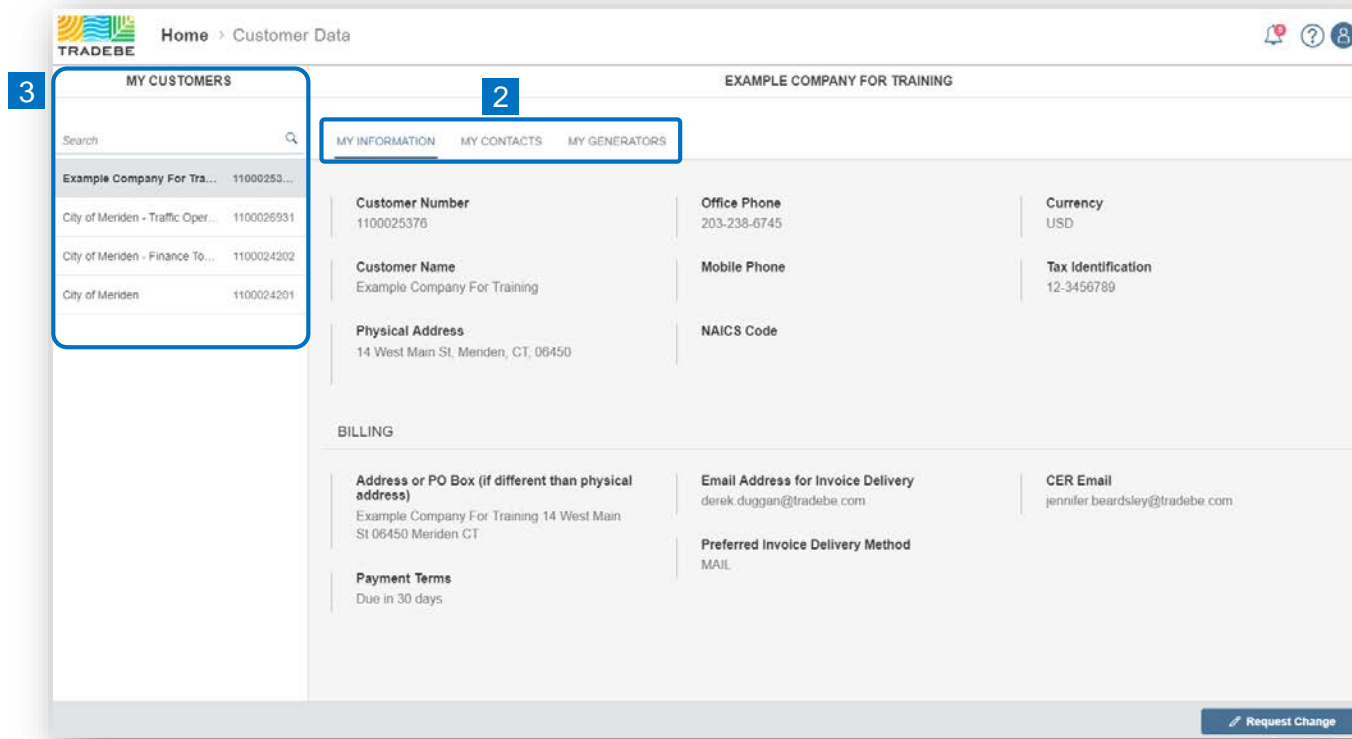
1 Select My Customer Data  either from the left tool bar or the tile on the Home Screen.



The screenshot shows the TRADEBE Home interface. The left sidebar contains a navigation menu with the following items: HOME, PROFILES, ORDERS, INVOICES, MY CUSTOMER DATA (highlighted with a blue box), USER MANAGEMENT, CHANGE REQUESTS, REPORTING, NOTIFICATIONS, REPORT AN INCIDENT, and GIVE FEEDBACK. The main content area features several tiles: PROFILES (0 Needs Assistance, 0 Approval Pending, 1 Total), ORDERS (0 Total), INVOICES, MY CUSTOMER DATA (General Information, Addresses & Contacts, highlighted with a blue box), USER MANAGEMENT, CHANGE REQUESTS, REPORTING, and NOTIFICATIONS (6 Total). On the right, a 'Total Profiles' summary shows 1 total profile, broken down into Draft, Need Assistance, Submitted, Pending, Expiring Soon, Expired, Cancelled (1), and Approved. The top right of the screen displays 'Example Company For Tra...', 'Show All Generators', and notification icons. The bottom of the screen features the slogan 'Sustainability at Work' and the TRADEBE logo.

My Customer Data | Default List View

- 1** This section provides access to the **Customer and Generator data**.
- 2** “**My Information**” is the **default view**. Toggle from one to another selecting the view title.
- 3** **Customer selection defaults** to the one previously selected in the Home Screen. This selection can be changed using the menu on the left or going back to the Home Screen.



Home > Customer Data

TRADEBE

EXAMPLE COMPANY FOR TRAINING

MY CUSTOMERS

Search

Example Company For Tra... 11000253...

City of Meriden - Traffic Oper... 1100026931

City of Meriden - Finance To... 1100024202

City of Meriden 1100024201

MY INFORMATION MY CONTACTS MY GENERATORS

Customer Number
1100025376

Office Phone
203-238-6745

Currency
USD

Customer Name
Example Company For Training

Mobile Phone

Tax Identification
12-3456789

Physical Address
14 West Main St, Meriden, CT, 06450

NAICS Code

BILLING

Address or PO Box (if different than physical address)
Example Company For Training 14 West Main St 06450 Meriden CT

Email Address for Invoice Delivery
derek.duggan@tradebe.com

CER Email
jennifer.beardsley@tradebe.com

Payment Terms
Due in 30 days

Preferred Invoice Delivery Method
MAIL

Request Change

- 1 “My Information” includes the main customer data and billing information.
- 2 **Request a Change** by selecting the button on the lower-right corner. The message will be submitted to Master Data for review.

EXAMPLE COMPANY FOR TRAINING

MY INFORMATION MY CONTACTS MY GENERATORS

Customer Number 1100025376	Office Phone 203-238-6745	Currency USD
Customer Name Example Company For Training	Mobile Phone	Tax Identification 12-3456789
Physical Address 14 West Main St, Meriden, CT, 06450	NAICS Code	

BILLING

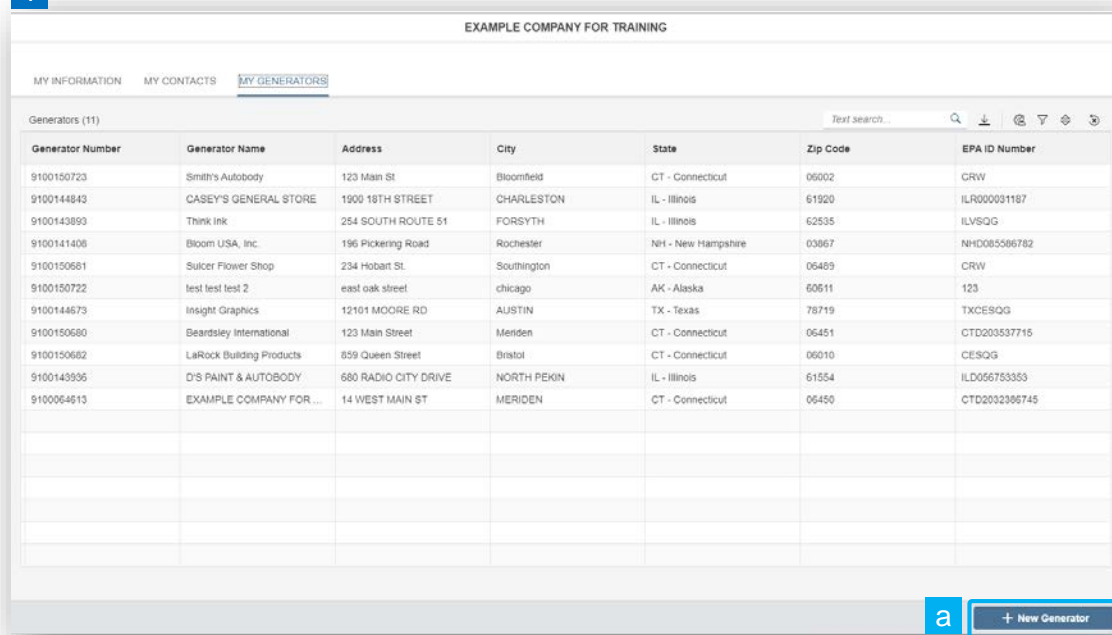
Address or PO Box (if different than physical address) Example Company For Training 14 West Main St 06450 Meriden CT	Email Address for Invoice Delivery derek.duggan@tradebe.com	CER Email jennifer.beardsloy@tradebe.com
Payment Terms Due in 30 days	Preferred Invoice Delivery Method MAIL	

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[Request Change](#)

- 1 **“My Generators”** displays a list of the generators assigned to the selected customer.
 - a **Create a New Generator** by selecting the “+ New Generator” button on the lower-right corner.
- 2 **Generator Details** can be opened selecting its corresponding row in the list, a window will pop-up.
 - a **Request a Change** in the Generator’s records by selecting the button “+ Request Change”.

1



EXAMPLE COMPANY FOR TRAINING

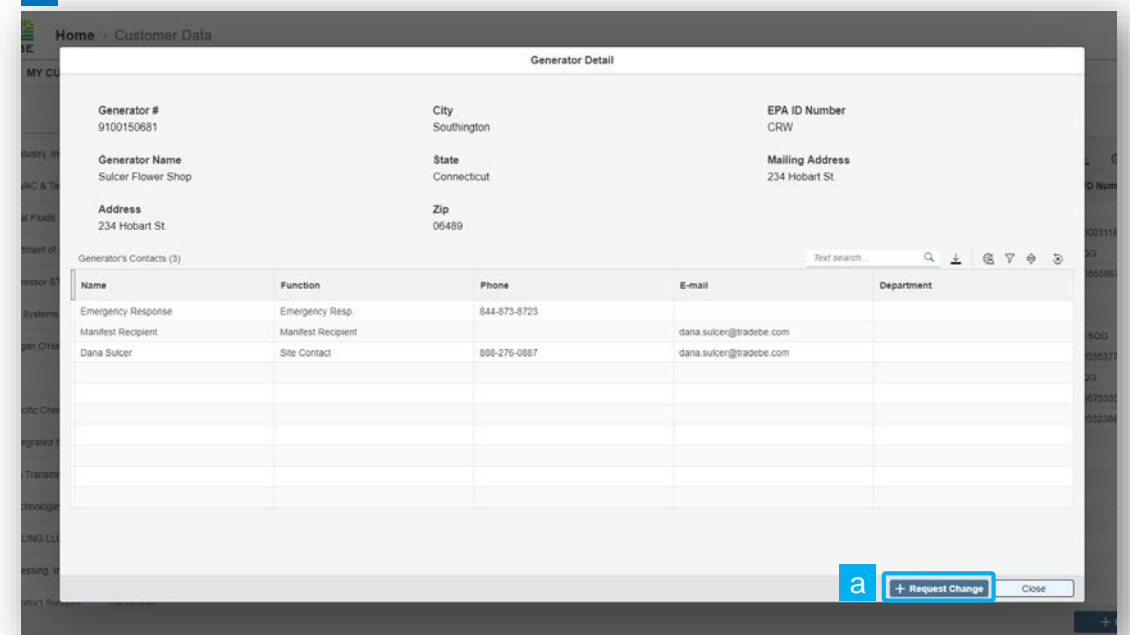
MY INFORMATION MY CONTACTS MY GENERATORS

Generators (11)

Generator Number	Generator Name	Address	City	State	Zip Code	EPA ID Number
9100150723	Smith's Autobody	123 Main St	Bloomfield	CT - Connecticut	06002	CRW
9100144843	CASEY'S GENERAL STORE	1900 18TH STREET	CHARLESTON	IL - Illinois	61920	ILR000031187
9100143893	Think link	254 SOUTH ROUTE 51	FORSYTH	IL - Illinois	62535	ILV5QG
9100141406	Bloom USA, Inc.	196 Pickering Road	Rochester	NH - New Hampshire	03067	NHD085586782
9100150681	Sulcer Flower Shop	234 Hobart St.	Southington	CT - Connecticut	06489	CRW
9100150722	test test test 2	east oak street	chicago	AK - Alaska	60511	123
9100144673	Insight Graphics	12101 MOORE RD	AUSTIN	TX - Texas	78719	TXCESQG
9100150680	Beardsley International	123 Main Street	Meriden	CT - Connecticut	06451	CTD203537715
9100150682	LaRock Building Products	859 Queen Street	Bristol	CT - Connecticut	06010	CESQG
9100143935	D'S PAINT & AUTOBODY	680 RADIO CITY DRIVE	NORTH PEKIN	IL - Illinois	61554	ILD056753353
9100064613	EXAMPLE COMPANY FOR ...	14 WEST MAIN ST	MERIDEN	CT - Connecticut	06450	CTD2032386745

a

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Home > Customer Data

Generator Detail

Generator # 9100150681 City Southington EPA ID Number CRW

Generator Name Sulcer Flower Shop State Connecticut Mailing Address 234 Hobart St.


Address 234 Hobart St. Zip 06489

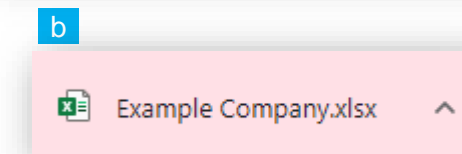
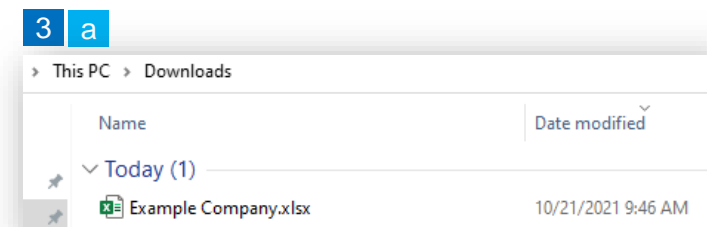
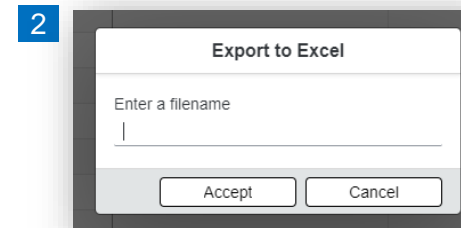
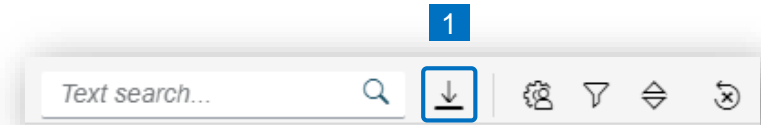
Generator's Contacts (3)

Name	Function	Phone	E-mail	Department
Emergency Response	Emergency Resp.	844-873-8725		
Manifest Recipient	Manifest Recipient		dana.sulcer@tradebe.com	
Dana Sulcer	Site Contact	888-276-0887	dana.sulcer@tradebe.com	


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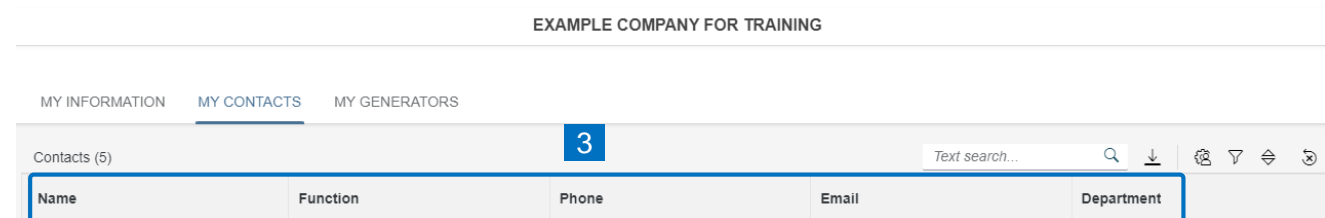
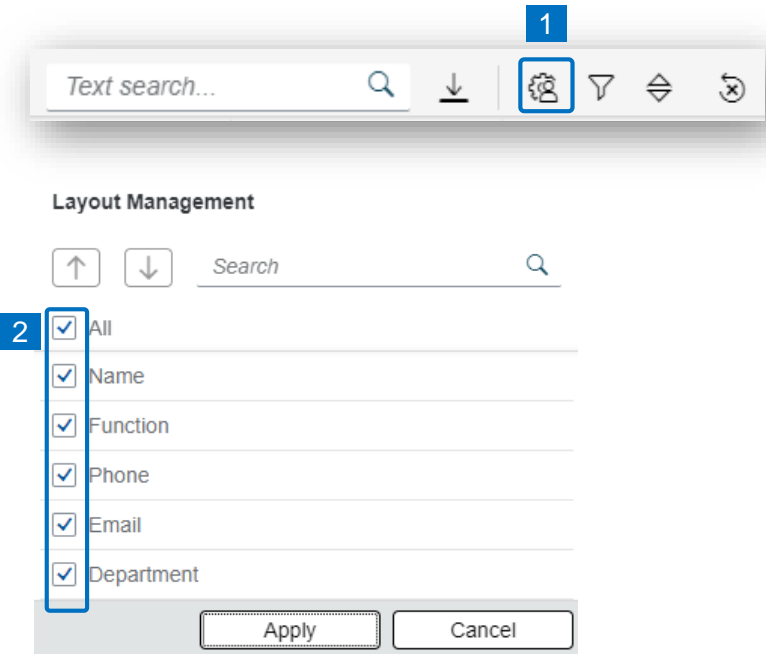
Export Contacts or Generators List

- 1** Export 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**






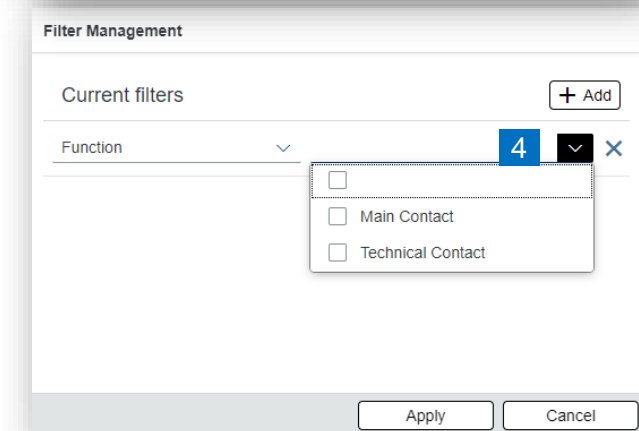
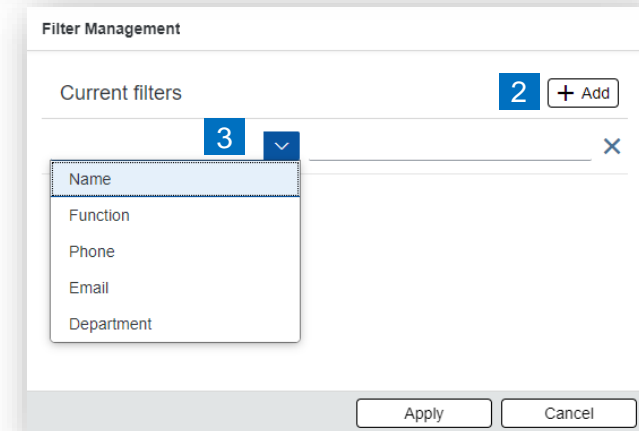
Change Layout

- 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.



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  .



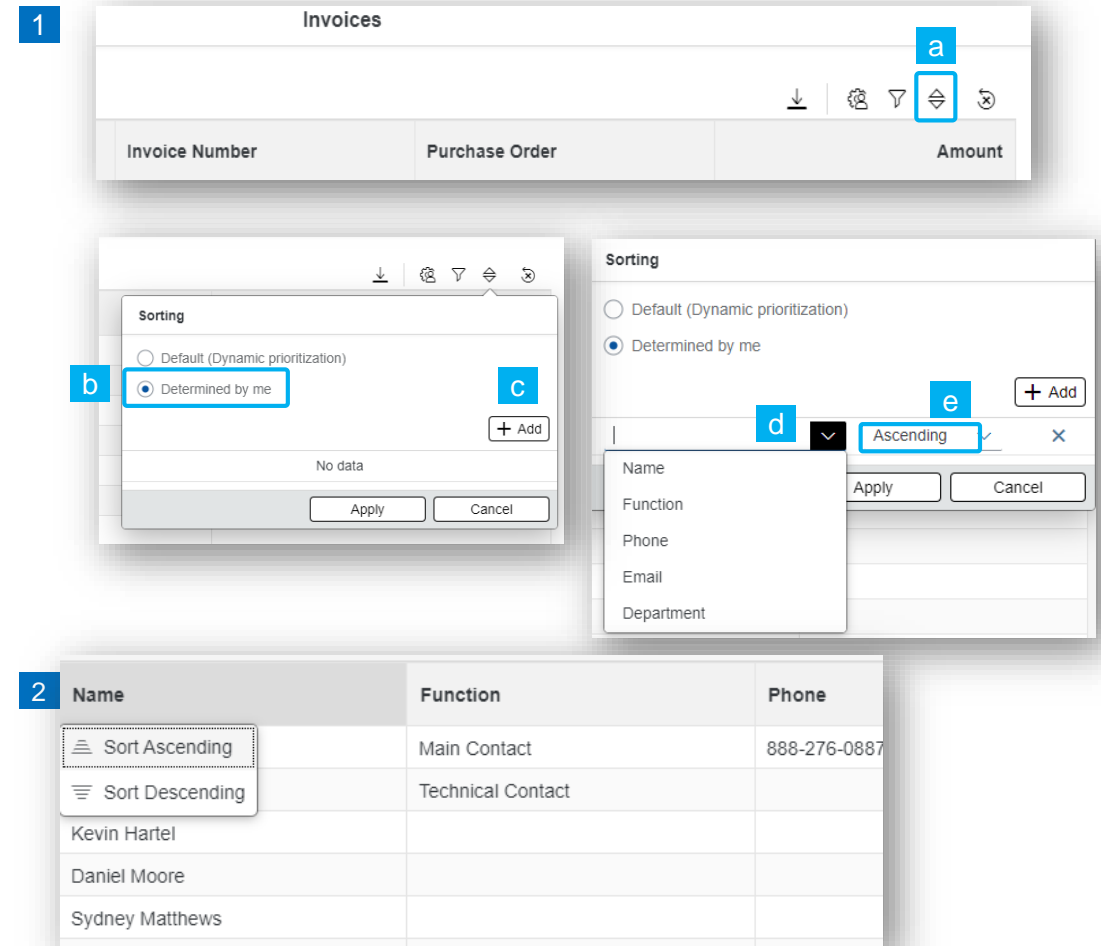
Sorting

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.



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 'Default (Dynamic prioritization)' and 'Determined by me'. The 'Determined by me' option is selected, and a sub-menu is open showing 'Ascending' and 'Descending' options. The 'Ascending' option is selected.

1

2










Name	Function	Phone
Kevin Hartel	Main Contact	888-276-0887
Daniel Moore	Technical Contact	
Sydney Matthews		

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



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