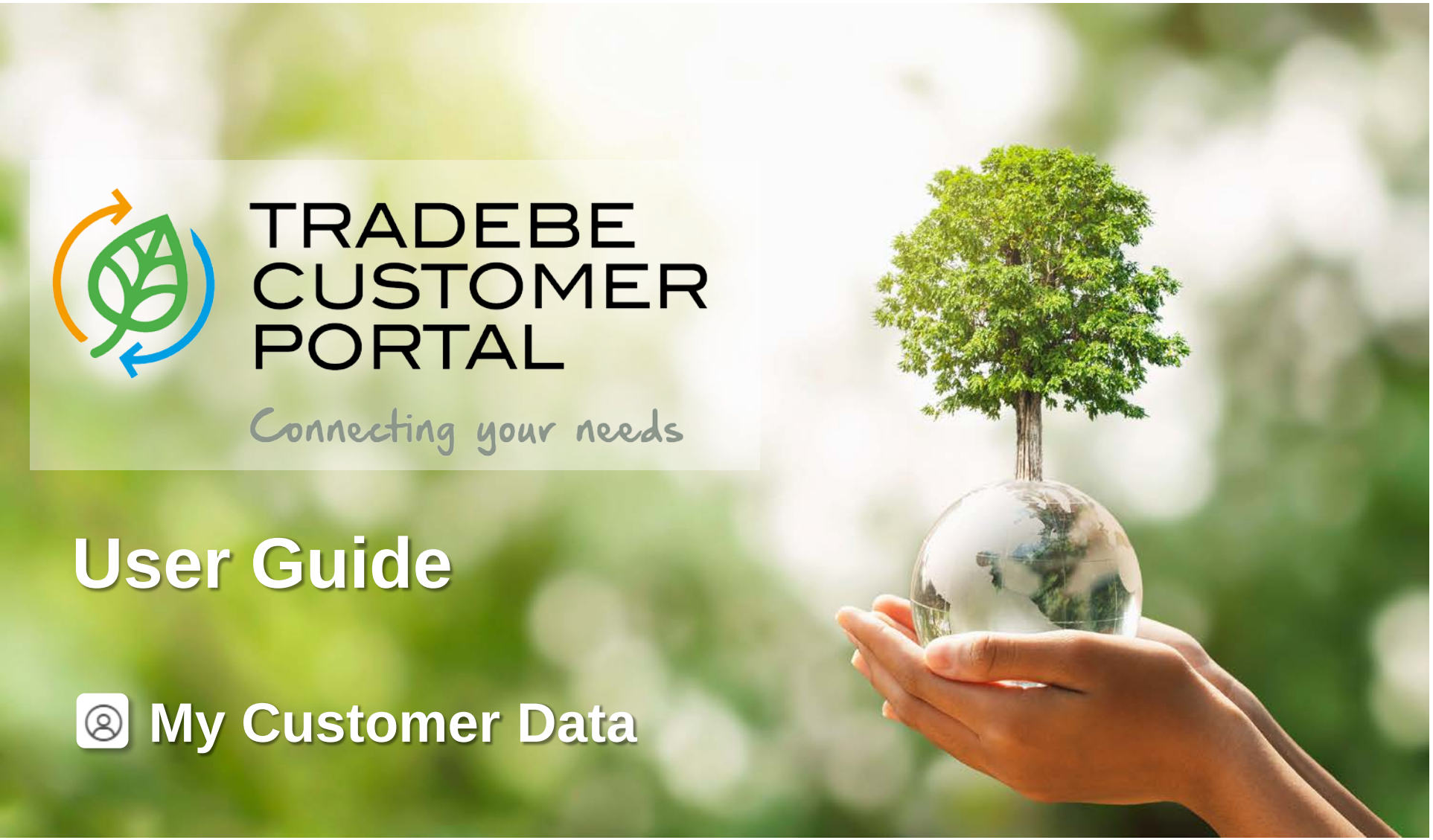


TRADEBE CUSTOMER PORTAL

Connecting your needs

User Guide

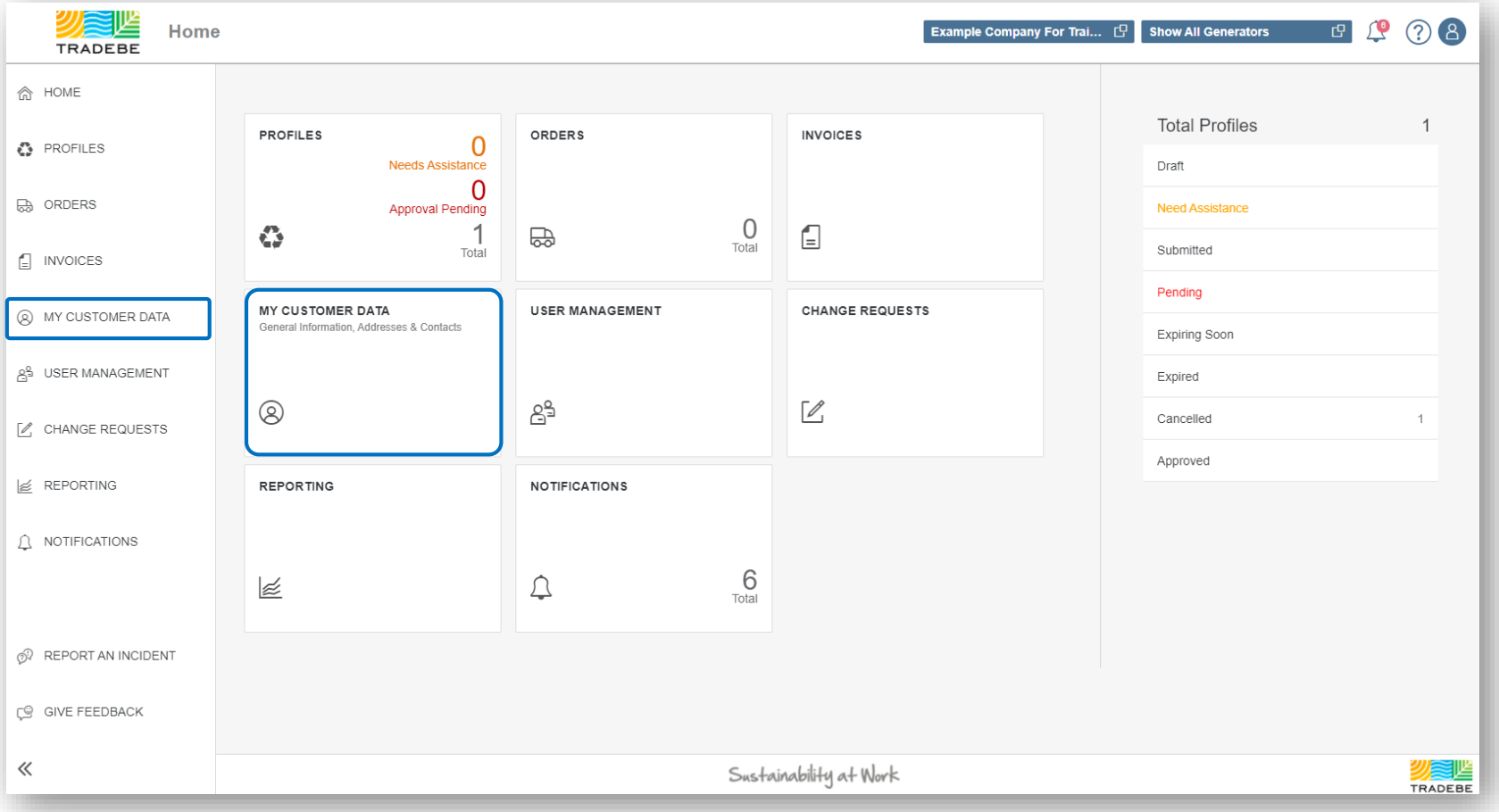
My Customer Data

TRADEBE

Sustainability at Work

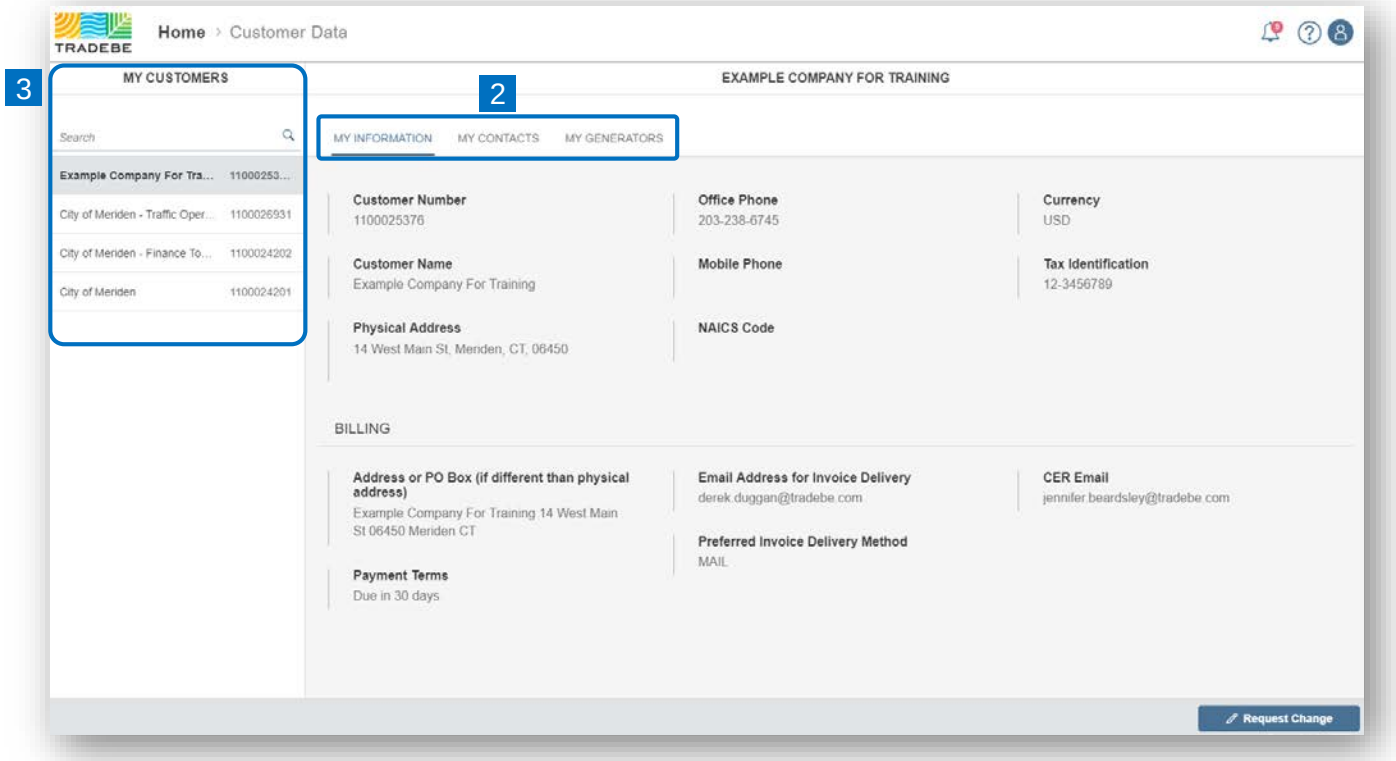
My Customer Data | Select

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



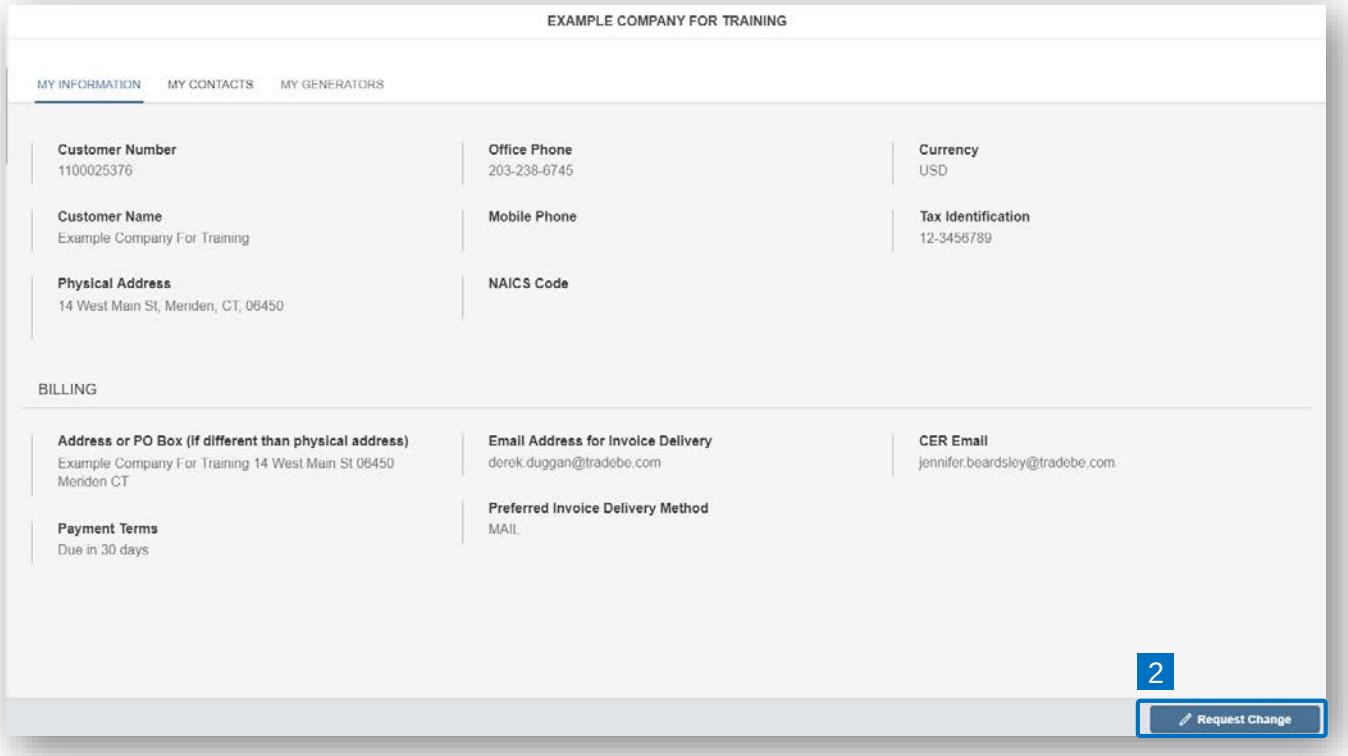
My Customer Data | Default List View

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.



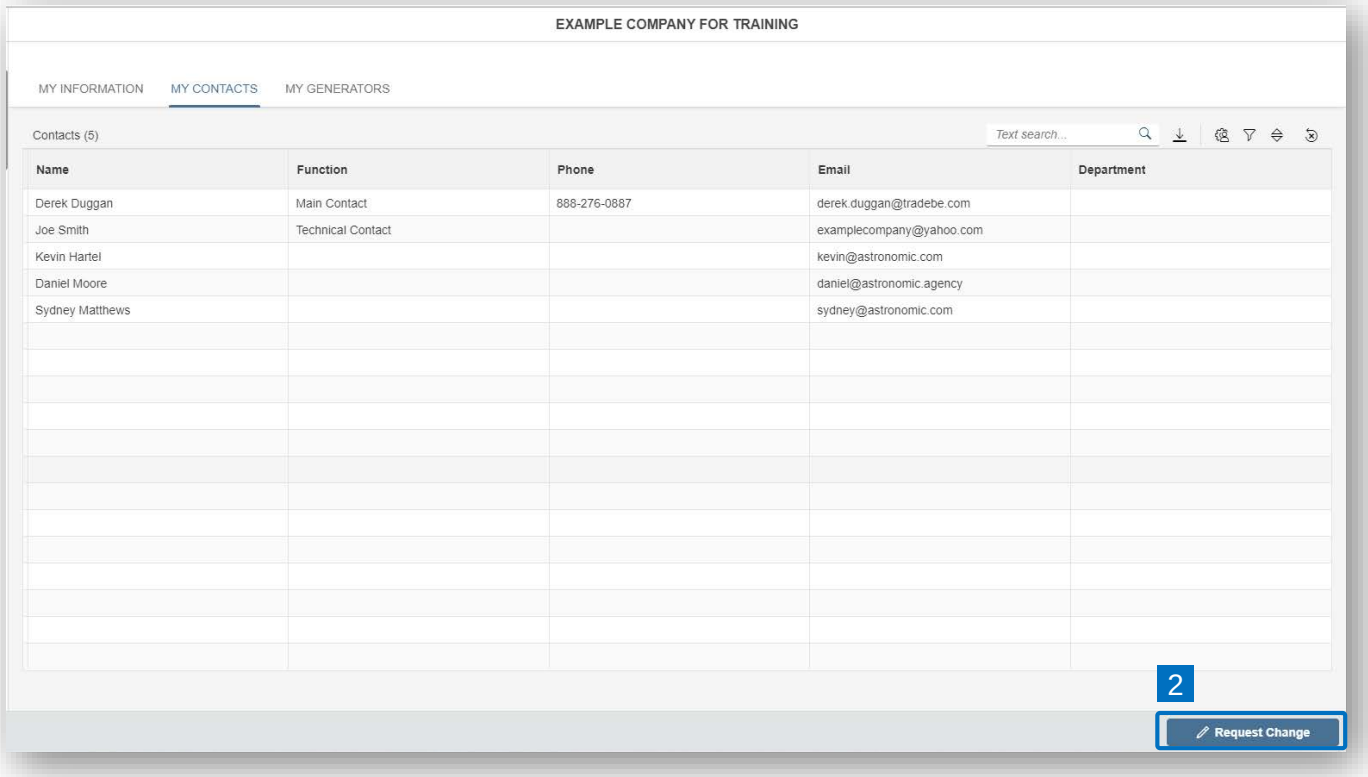
My Customer Data | My Information

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.



My Customer Data | My Contacts

1. **“My Contacts”** displays the contacts that we have in our systems for the selected customer.
2. **Request a Change** by selecting the button on the lower-right corner. The message will be submitted to Master Data for review.

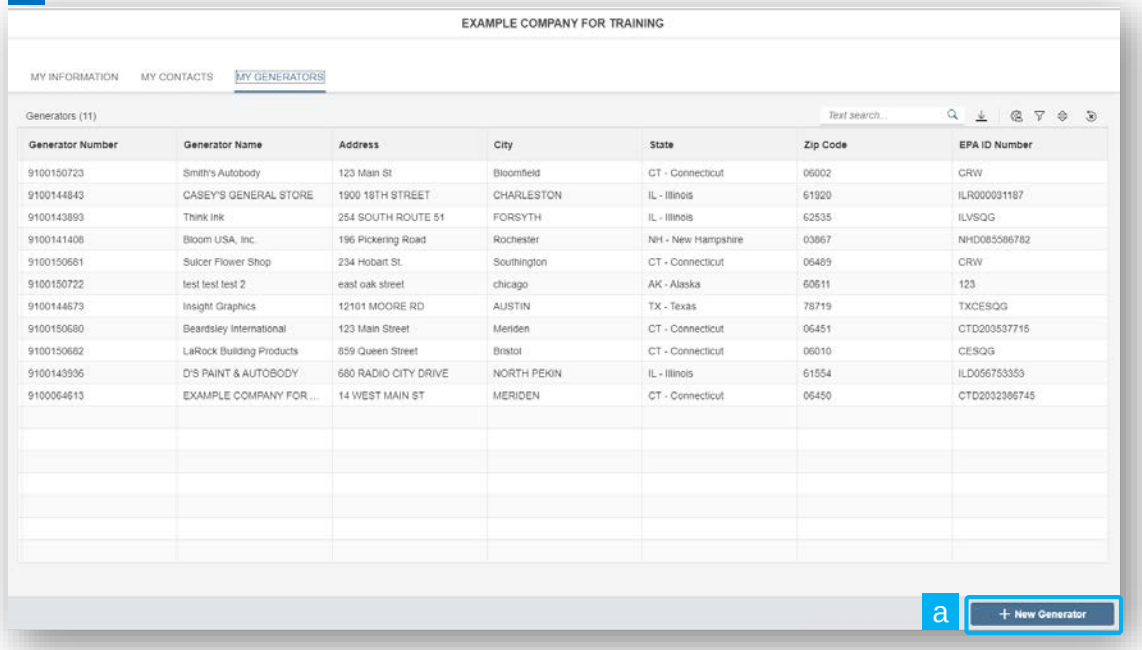


My Customer Data | My Generators

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



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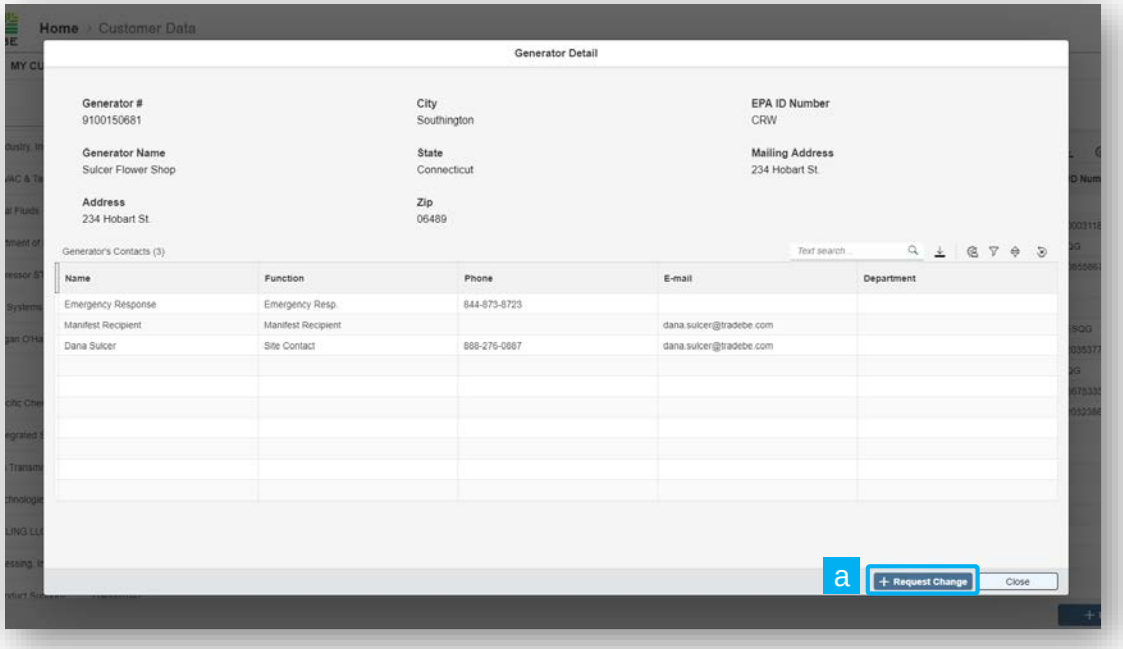


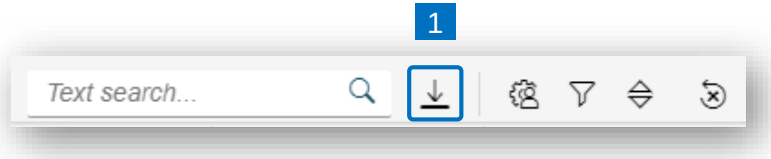
My Customer Data | Additional Options (1)

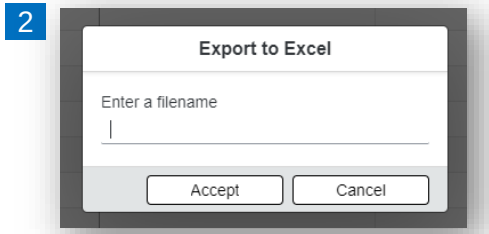
Export Contacts or Generators List

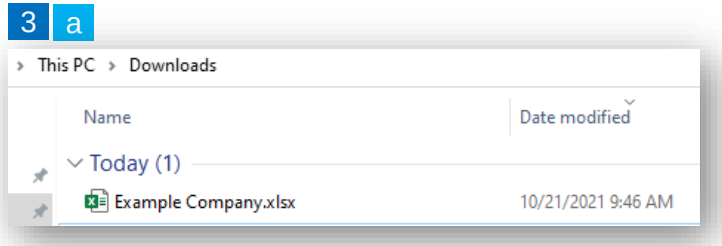
1 **Export list to Excel** by clicking on the download button .

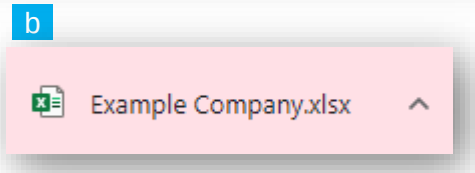
2 **Enter a File Name** in the pop-up to save the document in your computer.

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









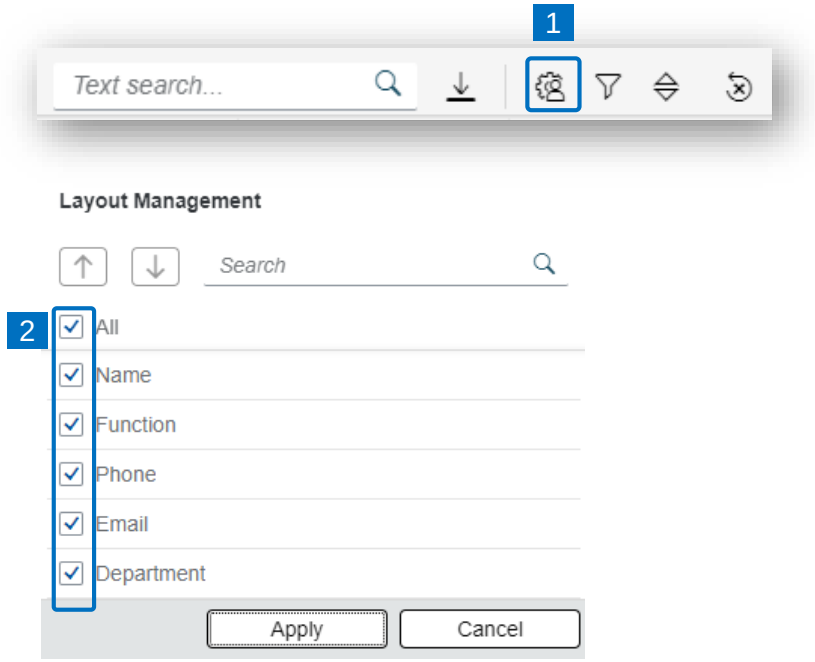
My Customer Data | Additional Options (2)

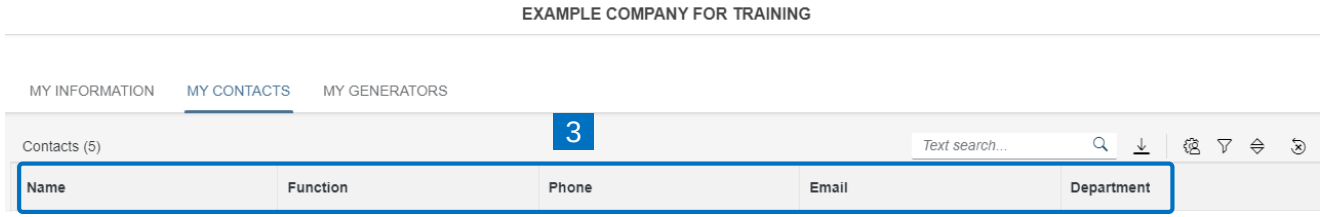
Change Layout

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.





My Customer Data | Additional Options (3)

Filtering

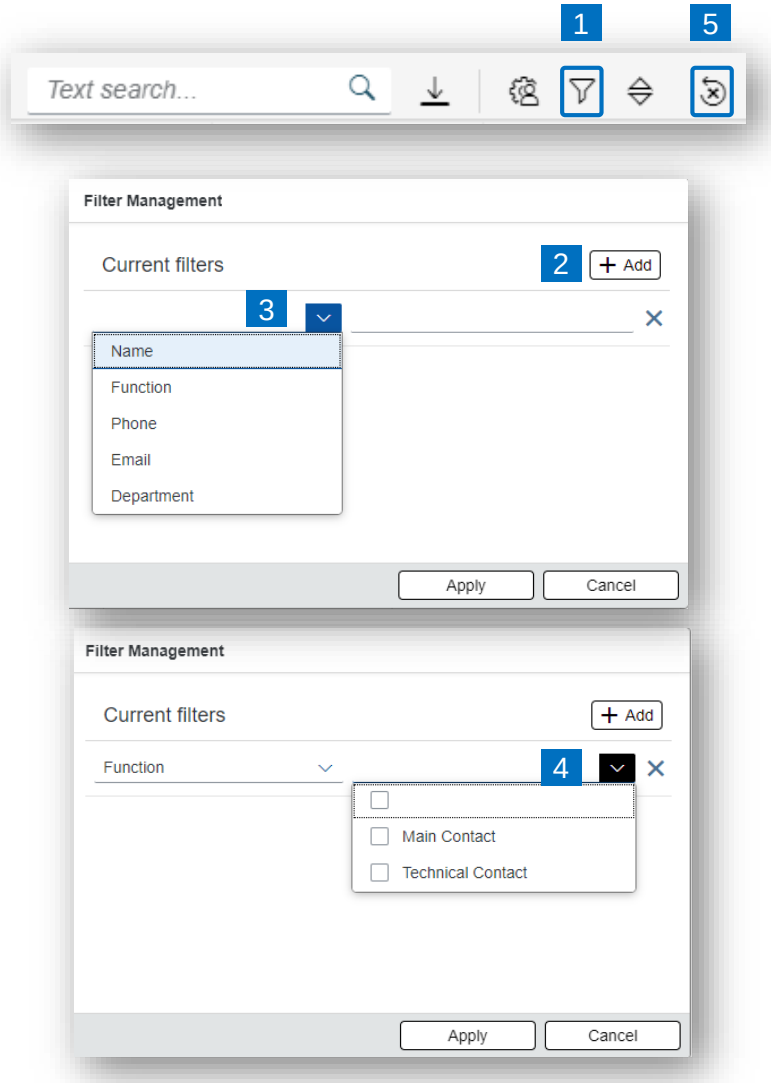
1 **Select the ‘Filtering’ icon** .

2 **Select ‘Add** + 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 .



My Customer Data | Additional Options (4)

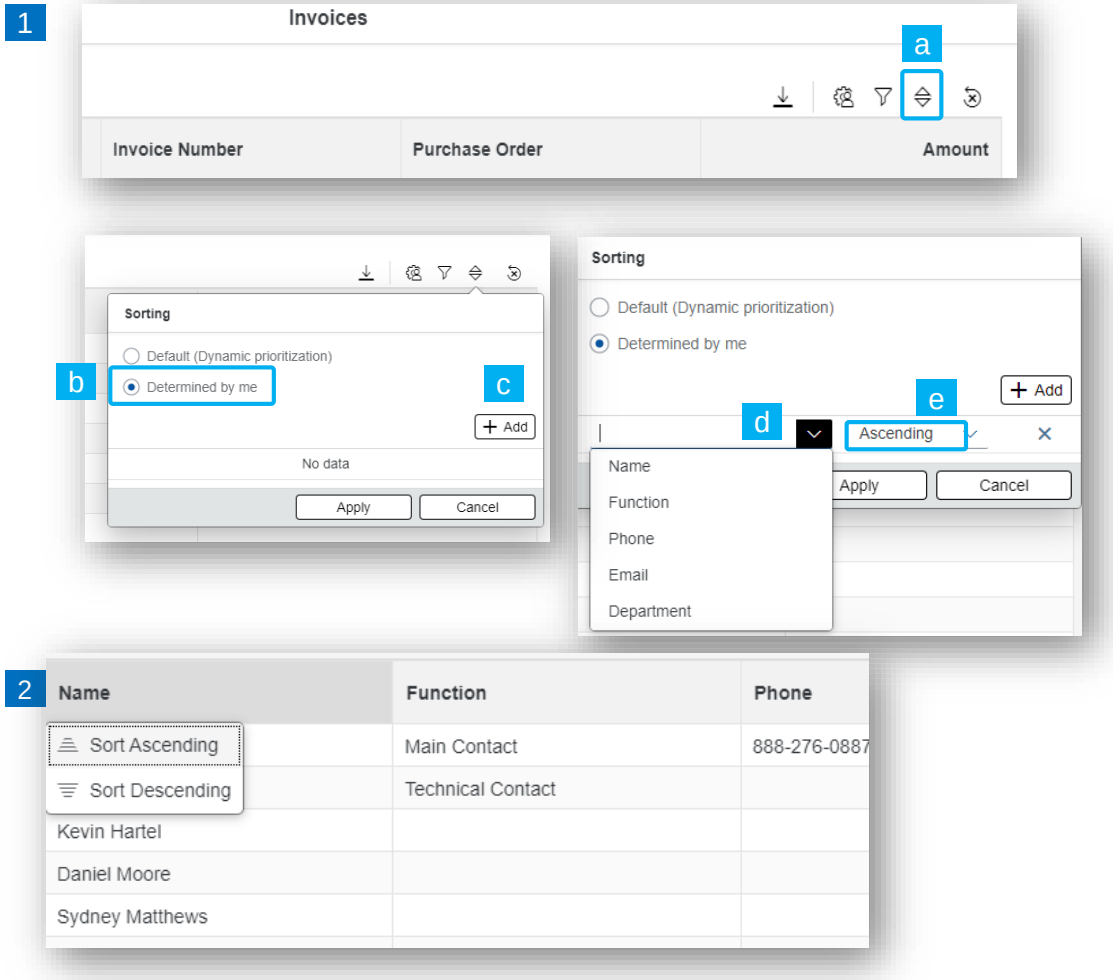
Sorting

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.



Help

Still have questions?

Contact your CER or e-mail us at adminportal@tradebe.com

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Change Requests	Link
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