



TRADEBE CUSTOMER PORTAL

Connecting your needs

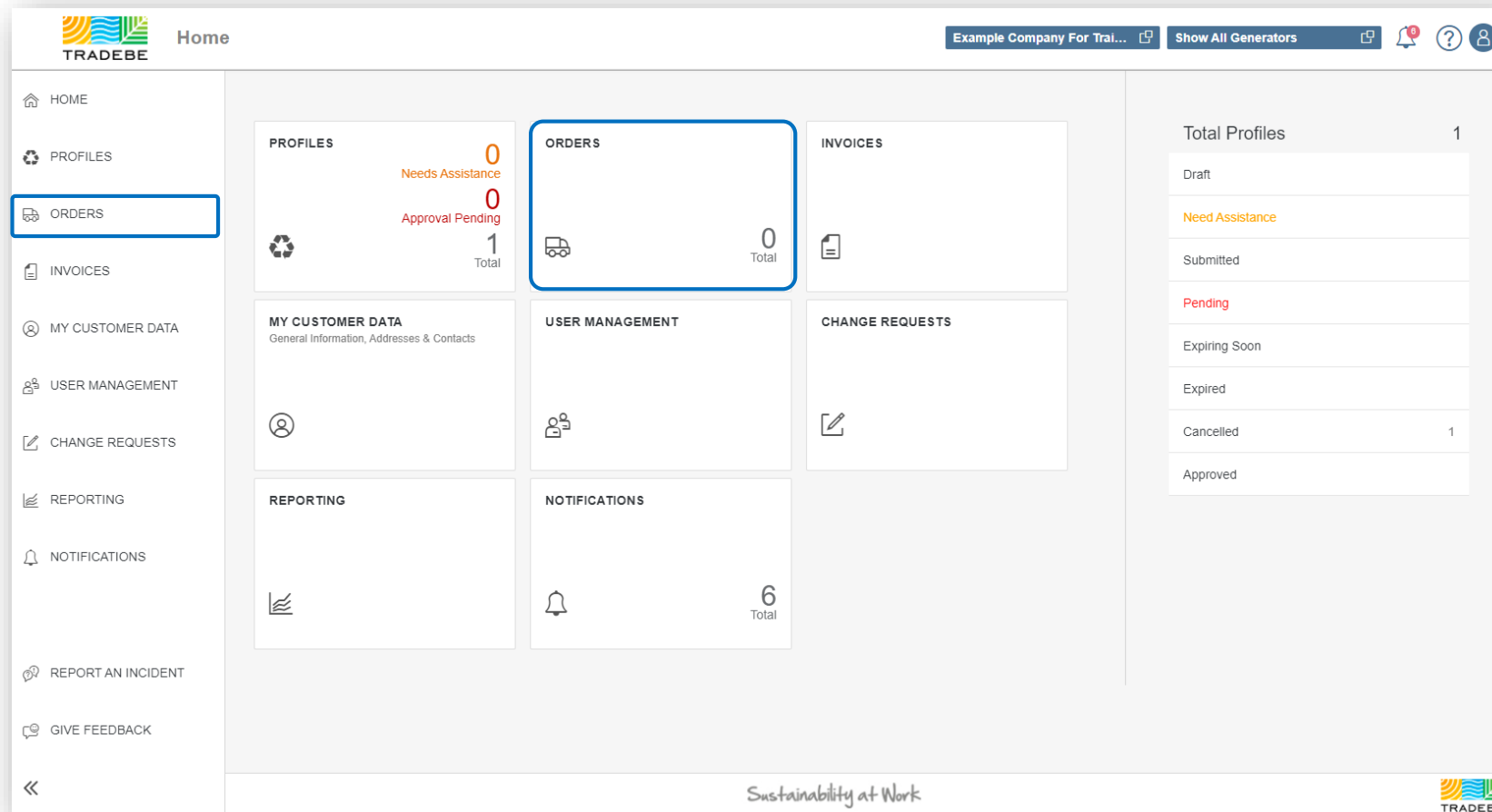
User Guide

 **Orders**



TRADEBE
Sustainability at Work

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



The screenshot shows the TRADEBE Home dashboard. The left sidebar contains navigation options: HOME, PROFILES, ORDERS (highlighted with a blue box), INVOICES, MY CUSTOMER DATA, 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, highlighted with a blue box), INVOICES, MY CUSTOMER DATA (General Information, Addresses & Contacts), USER MANAGEMENT, CHANGE REQUESTS, REPORTING, and NOTIFICATIONS (6 Total). The right sidebar displays a 'Total Profiles' summary with a count of 1, broken down into Draft, Need Assistance, Submitted, Pending, Expiring Soon, Expired, Cancelled (1), and Approved. The top navigation bar includes the TRADEBE logo, 'Home', a company name 'Example Company For Tra...', and a 'Show All Generators' button. The bottom of the screen features the slogan 'Sustainability at Work' and the TRADEBE logo.

- 1** This view displays all Sales Orders for the Selected Customer, including some characteristic information and providing quick access to related documentation.
- 2** By default, the Date Range is set to previous 30 days. To modify this filter or add any additional one, open the Filters section on the upper left.

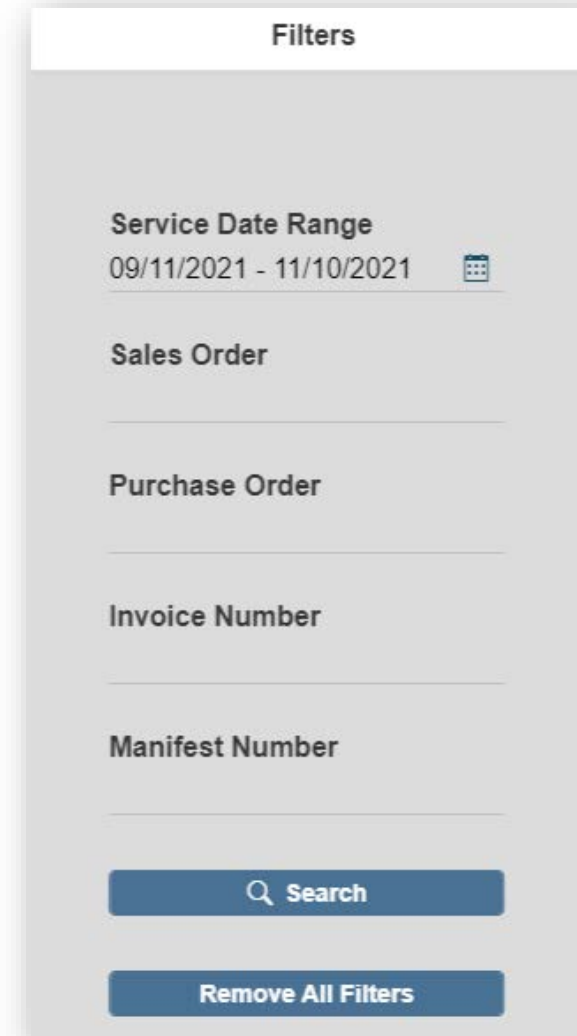
2 Filters

ORDERS

1 Orders (4) Text search... 🔍 ⬇️ 🔄 🔼 🔽 🔄

Service Date	Generator Name	Sales Order	Purchase Order	Status	Received Date	Invoice Date	Invoice	Manifest	Certificate of Management
11/08/2021	Sulcer Flower Shop	2398780		In transit				2398449	
09/08/2021	Sulcer Flower Shop	2398447	090821SFS-1	Billed	09/08/2021	09/15/2021	4440124079	012345678SFS	2398447
09/08/2021	Sulcer Flower Shop	2398448	090821SFS-1AB	Billed	09/08/2021	09/15/2021	4440124081	012345679SFS	2398448
09/09/2021	Sulcer Flower Shop	2398449	Test	Billed	09/22/2021	11/03/2021	4440124093	022345679SFS	2398449

- 1 Select Service 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 'Filters' modal with the following fields and buttons:

- Service Date Range:** 09/11/2021 - 11/10/2021 (with a calendar icon)
- Sales Order:** (empty text input)
- Purchase Order:** (empty text input)
- Invoice Number:** (empty text input)
- Manifest Number:** (empty text input)
- Search:** (blue button with a magnifying glass icon)
- Remove All Filters:** (blue button)

- 1 Alternatively, **Text Search** can also be used to navigate through the list of orders. The list will update immediately when text is typed in the box.

Filters ORDERS

Orders (4) Text search...      

Service Date	Generator Name	Sales Order	Purchase Order	Status	Received Date	Invoice Date	Invoice	Manifest	Certificate of Management
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09/09/2021	Sulcer Flower Shop	2398449	Test	Billed	09/22/2021	11/03/2021	4440124093	022345679SFS	2398449

- 1 To Open a Document**, be it an Invoice, a Manifest or a Certificate of Management, select the document name for the corresponding Order.

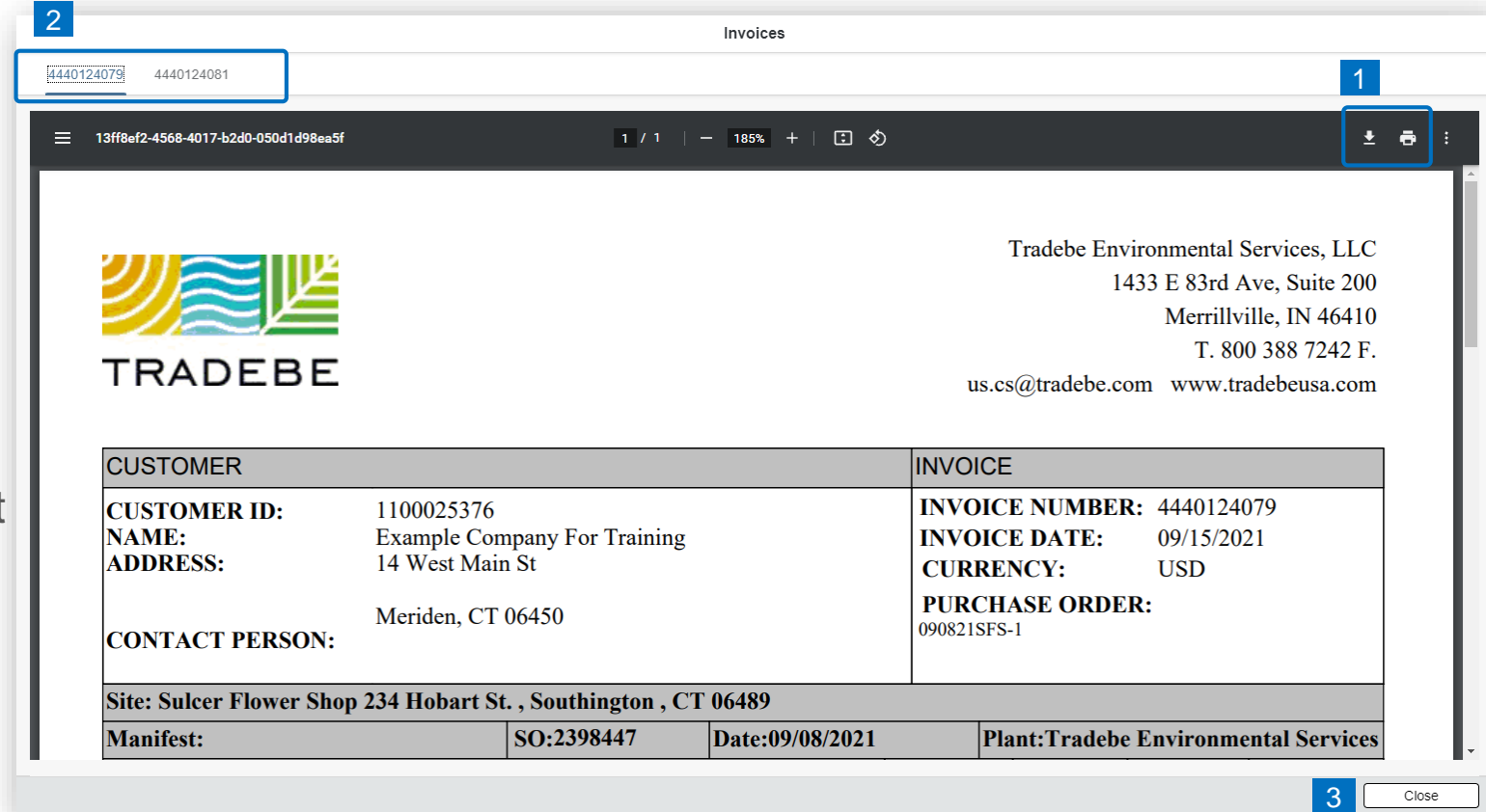
Filters ORDERS

Orders (4) Text search... 🔍 ⬇️ 🔄 🔍 ⚙️

Service Date	Generator Name	Sales Order	Purchase Order	Status	Received Date	Invoice Date	Invoice	Manifest	Certificate of Management
11/08/2021	Sulcer Flower Shop	2398780		In transit				2398449	
09/08/2021	Sulcer Flower Shop	2398447	090821SFS-1	Billed	09/08/2021	09/15/2021	4440124079	012345678SFS	2398447
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i Tip: the name of the document displayed in blue indicates it's a clickable link.

- 1 Document View actions:**
 - Download
 - Print
- 2 When multiple documents are included in an order (i.e. multiple Manifests), toggle using the document name at the top.**
- 3 Close to go back to the List View.**



Invoices

4440124079 4440124081

13ff8ef2-4568-4017-b2d0-050d1d98ea5f 1 / 1 185%


TRADEBE

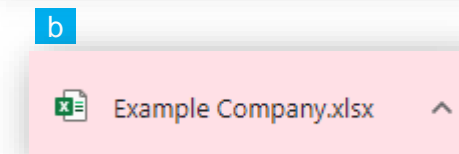
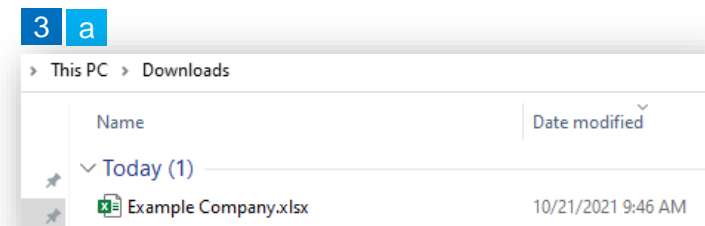
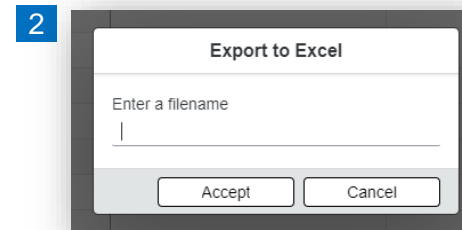
Tradebe Environmental Services, LLC
1433 E 83rd Ave, Suite 200
Merrillville, IN 46410
T. 800 388 7242 F.
us.cs@tradebe.com www.tradebeusa.com

CUSTOMER		INVOICE	
CUSTOMER ID:	1100025376	INVOICE NUMBER:	4440124079
NAME:	Example Company For Training	INVOICE DATE:	09/15/2021
ADDRESS:	14 West Main St	CURRENCY:	USD
	Meriden, CT 06450	PURCHASE ORDER:	090821SFS-1
CONTACT PERSON:			
Site: Sulcer Flower Shop 234 Hobart St. , Southington , CT 06489			
Manifest:	SO:2398447	Date:09/08/2021	Plant:Tradebe Environmental Services


Close

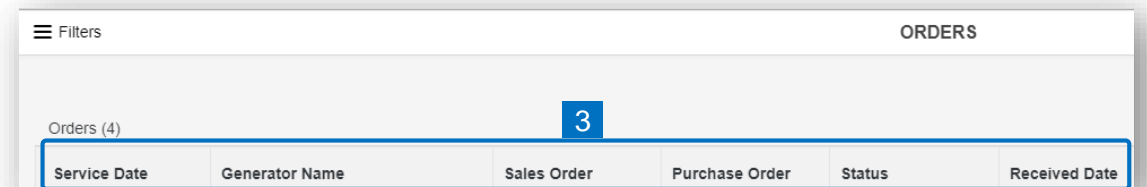
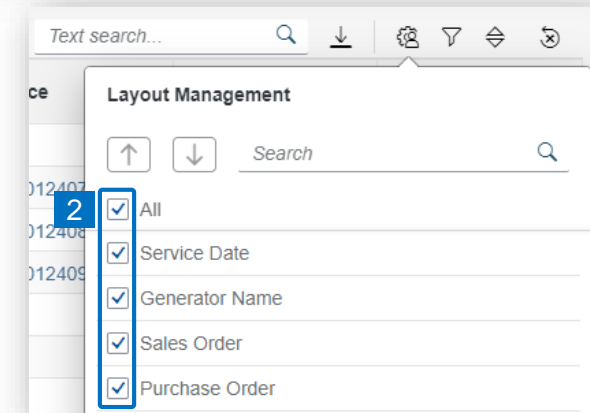
Export Orders List

- 1** Export orders 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**






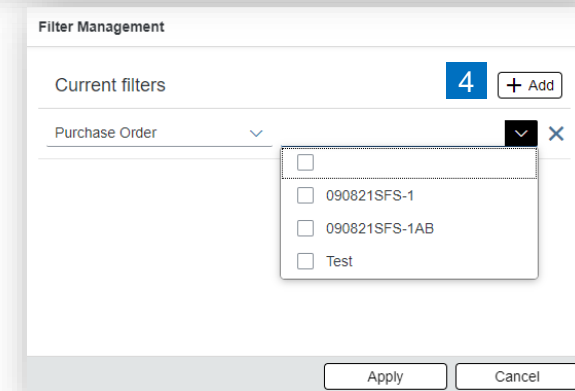
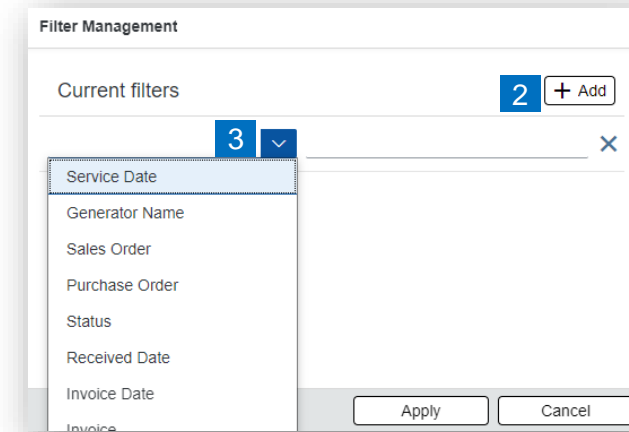
Change Layout

- 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

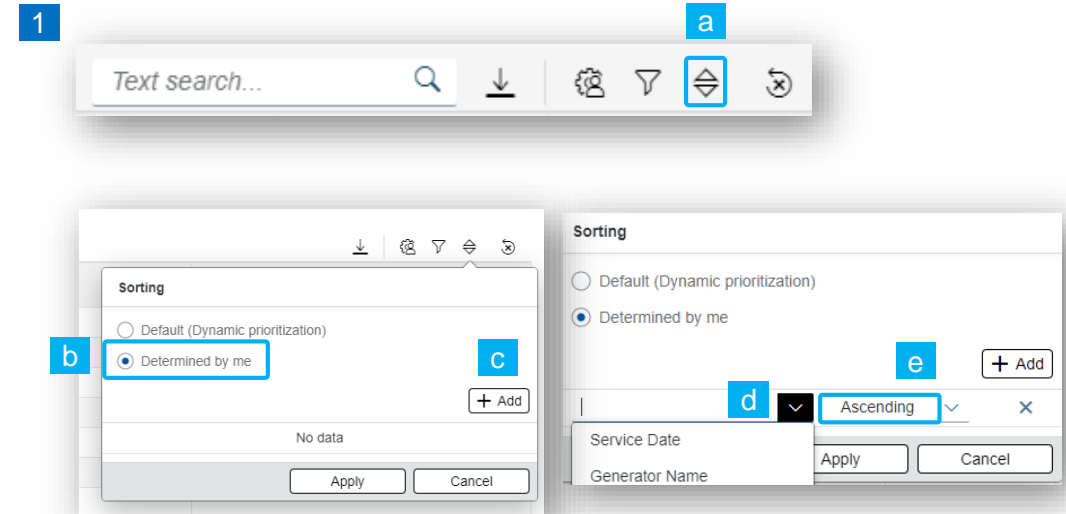
1 Sorting “Option 1”:

- 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.

1



a

b

c

d

e

2










Service Date	Generator Name	Sales Order	Purchase Order
11/08/2021	Sulcer Flower Shop	Sort Ascending	
09/08/2021	Sulcer Flower Shop	Sort Descending	090821SFS-1
09/08/2021	Sulcer Flower Shop	2398448	090821SFS-1AB
09/09/2021	Sulcer Flower Shop	2398449	Test

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



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Sustainability at Work

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