TRADEBE CUSTOMER PORTAL

Connecting your needs
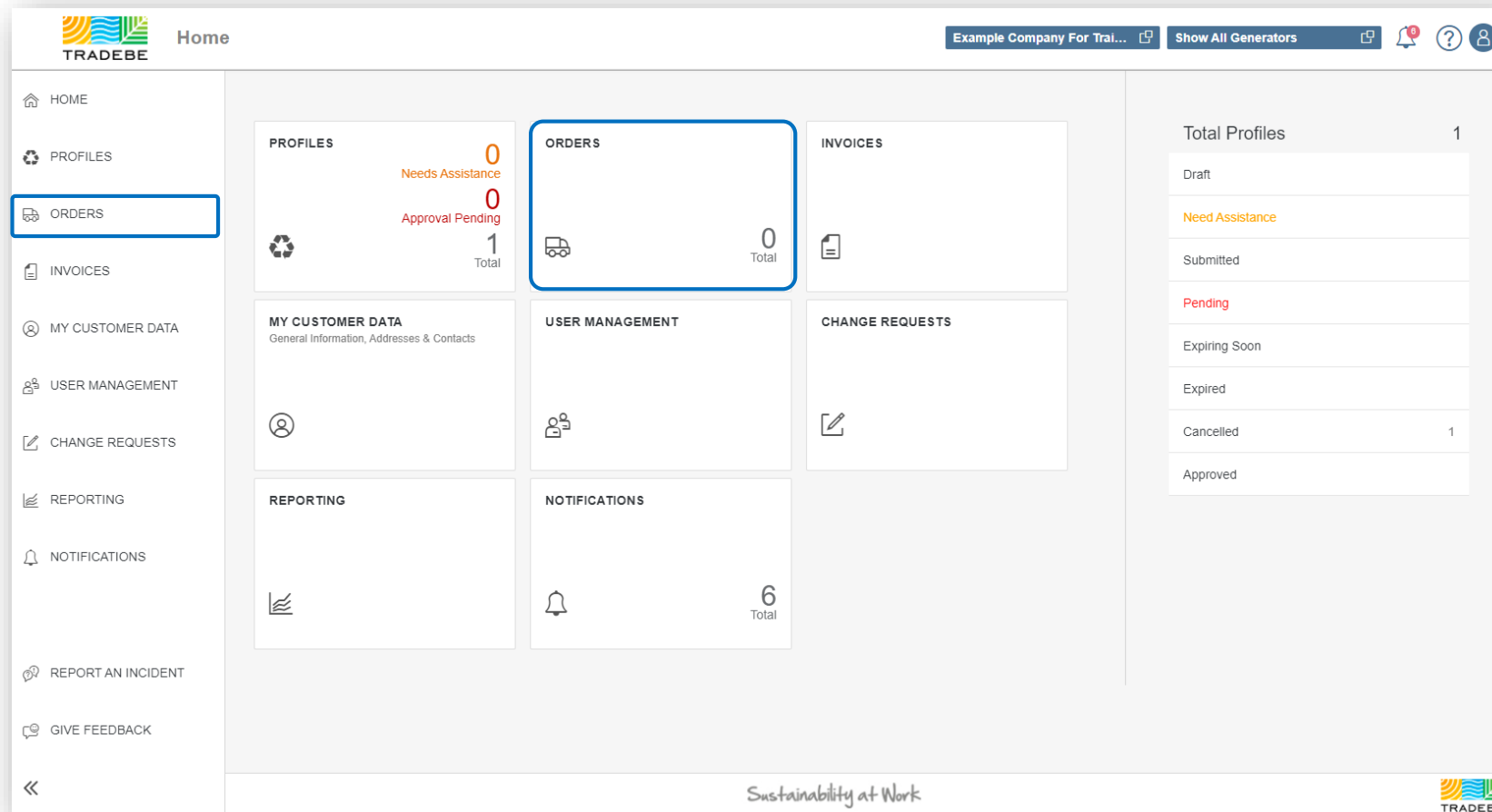
User Guide

🚚 **Orders**

TRADEBE

Sustainability at Work

Orders | Select

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

Orders | Default List View

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.
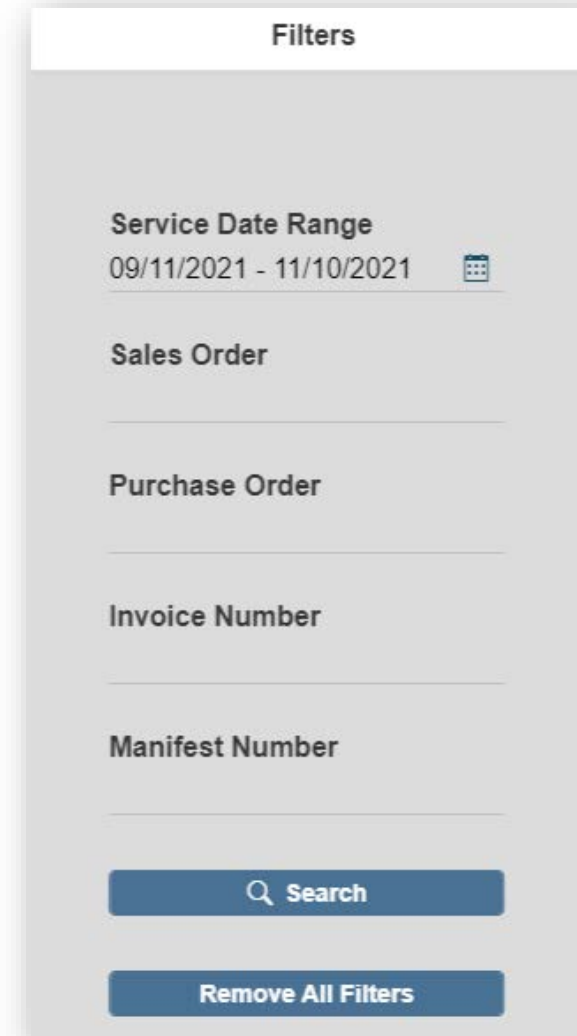
2 ☰ Filters

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

Orders | Filter

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.**

Filters

Service Date Range
09/11/2021 - 11/10/2021

Sales Order

Purchase Order

Invoice Number

Manifest Number

🔍 Search

Remove All Filters

Orders | Text Search

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.

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.
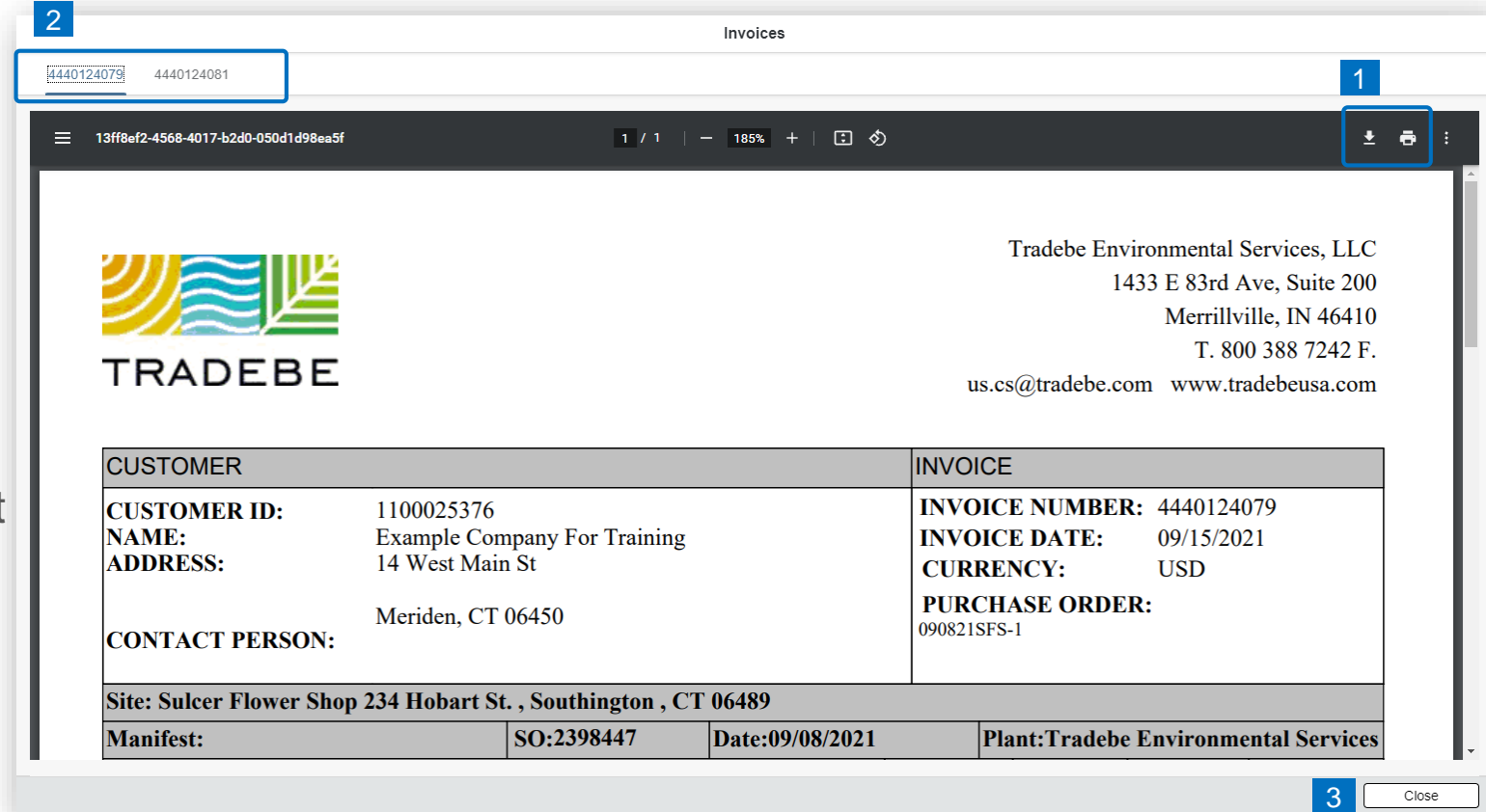
≡ Filters   ORDERS

Orders (4)   Text search...

Service Date	Generator Name	Sales Order	Purchase Order	Status	Received Date	Invoice Date	Invoice	Manifest	Certificate of Management
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i Tip: the name of the document displayed in blue indicates it's a clickable link.

Orders | Document View

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.

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
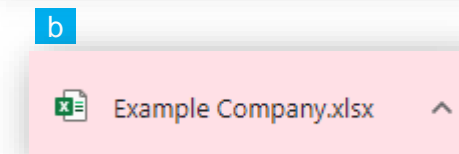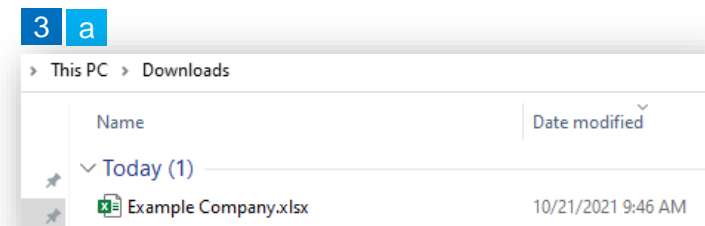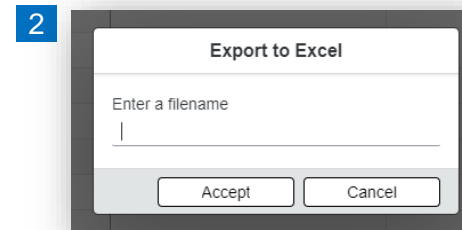
Change Layout

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.
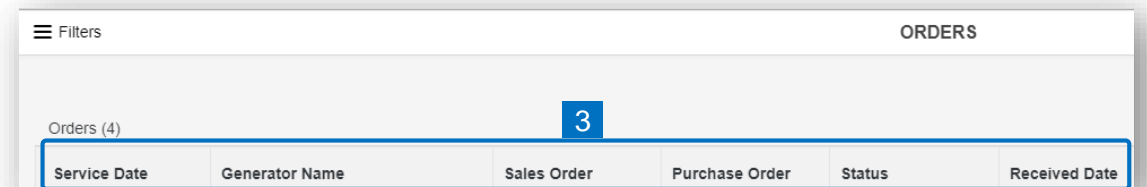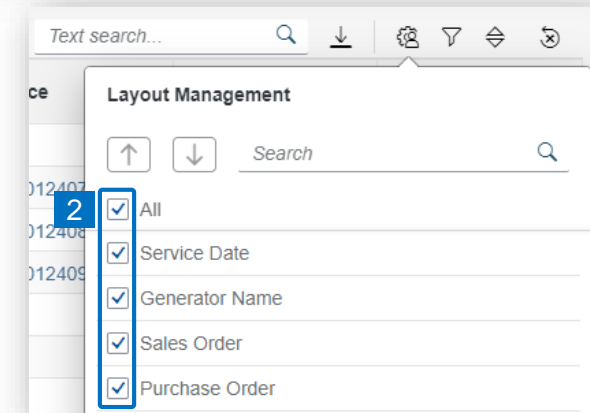
Filtering

1 **Select the 'Filtering' icon** ⧩ .

2 **Select 'Add** ⊞ 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".

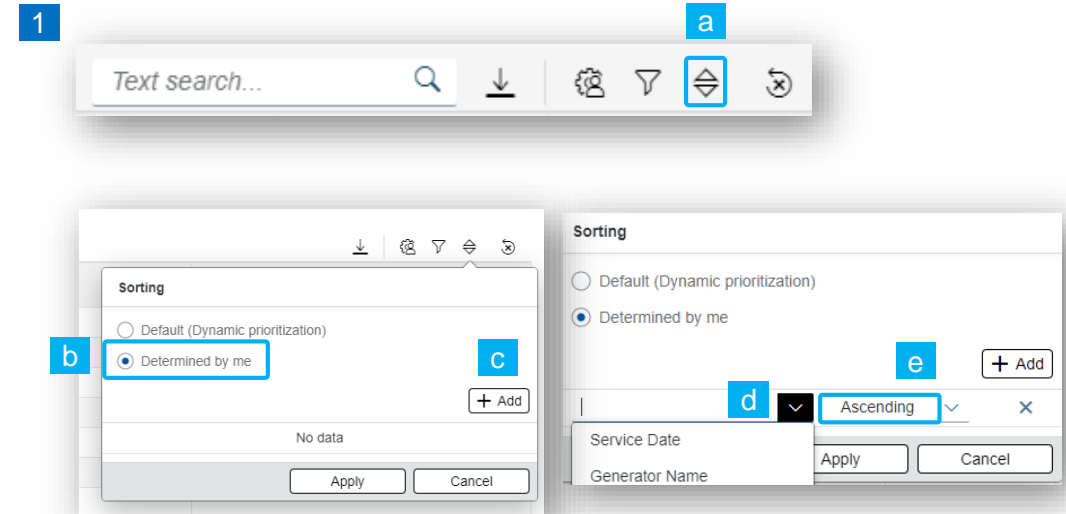**5** **To clear all filters,** click on the icon ⟲ .
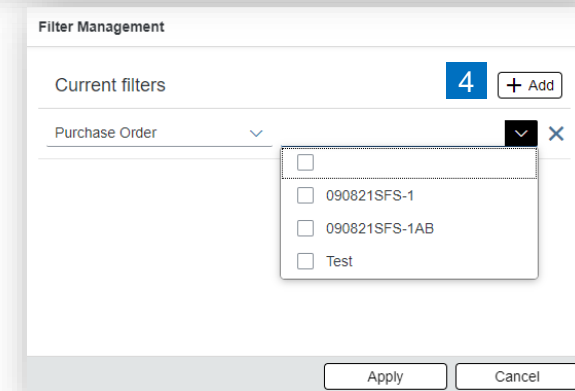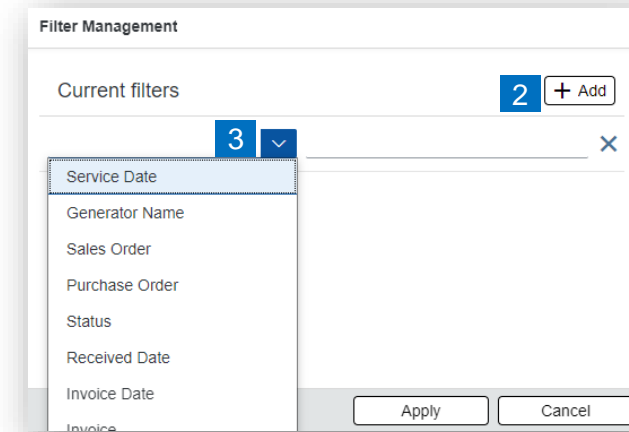
Sorting

1 **Sorting "Option 1":**
   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

Access To Other User Guides

Portal Functionality	PDF Guide
⌂ Home Screen	Link
♻ Profiles	Link
🚚 **Orders**	*This guide*
🗋 Invoices	Link
⊚ My Customer Data	Link
✎ Change Requests	Link
⌁ Reporting	Link
🔔 Notifications	Link
👤 Request a New User	Link

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