



TRADEBE CUSTOMER PORTAL

Connecting your needs

User Guide

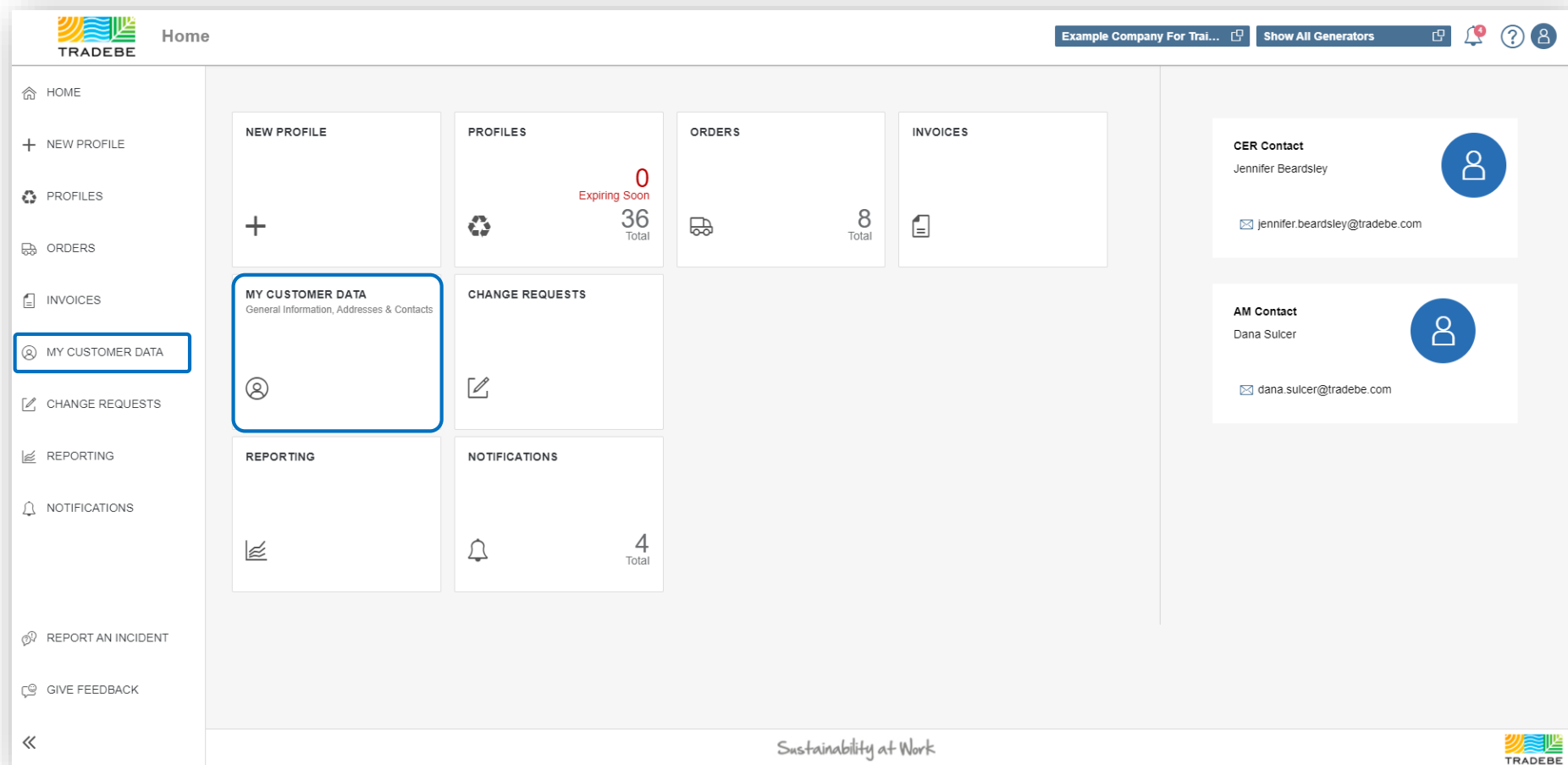
 My Customer Data



TRADEBE

Sustainability at Work

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



The screenshot displays the TRADEBE Home interface. The top navigation bar includes the TRADEBE logo, the word "Home", and utility buttons for "Example Company For Trai...", "Show All Generators", a notification bell, a help icon, and a user profile icon. The left sidebar contains a list of menu items: HOME, NEW PROFILE, PROFILES, ORDERS, INVOICES, MY CUSTOMER DATA (highlighted with a blue box and a person icon), CHANGE REQUESTS, REPORTING, NOTIFICATIONS, REPORT AN INCIDENT, and GIVE FEEDBACK. The main dashboard area features several tiles: "NEW PROFILE" with a plus icon; "PROFILES" showing 0 "Expiring Soon" and 36 "Total"; "ORDERS" showing 8 "Total"; "INVOICES" with a document icon; "MY CUSTOMER DATA" (highlighted with a blue box and a person icon) with the subtitle "General Information, Addresses & Contacts"; "CHANGE REQUESTS" with a pencil icon; "REPORTING" with a bar chart icon; and "NOTIFICATIONS" showing 4 "Total". On the right side, there are two contact cards: "CER Contact" for Jennifer Beardley (jennifer.beardsley@tradebe.com) and "AM Contact" for Dana Sulcer (dana.sulcer@tradebe.com), each with a person icon. The footer includes the text "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.

The screenshot displays the TRADEBE web application interface. At the top, the breadcrumb navigation shows 'Home > Customer Data'. The main content area is titled 'EXAMPLE COMPANY FOR TRAINING'. On the left, a 'MY CUSTOMERS' sidebar contains a search bar and a list of customer entries. The main area shows a detailed view for the selected customer, with tabs for 'MY INFORMATION', 'MY CONTACTS', and 'MY GENERATORS'. The 'MY INFORMATION' tab is active, displaying various fields such as Customer Number, Office Phone, Currency, Customer Name, Mobile Phone, Tax Identification, Physical Address, and NAICS Code. Below this, a 'BILLING' section includes fields for Address or PO Box, Email Address for Invoice Delivery, CER Email, Payment Terms, and Preferred Invoice Delivery Method. A 'Request Change' button is located at the bottom right of the interface.

Customer Name	Customer Number
Example Company For Tra...	1100025376
City of Meriden - Traffic Oper...	1100026931
City of Meriden - Finance To...	1100024202
City of Meriden	1100024201

Customer Information	Contact Information	Identification
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 Information	Invoice Delivery	Other
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	

- 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 Tradebe 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.beardsley@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 Ink	254 SOUTH ROUTE 51	FORSYTH	IL - Illinois	62535	ILVSQG
9100141408	Bloom USA, Inc.	196 Pickering Road	Rochester	NH - New Hampshire	03867	NHD085586782
9100150681	Sulcer Flower Shop	234 Hobart St.	Southington	CT - Connecticut	06489	CRW
9100150722	test test test 2	east oak street	chicago	AK - Alaska	60611	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
9100143936	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 [+ New Generator](#)

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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

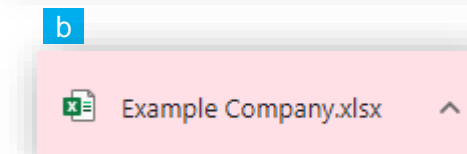
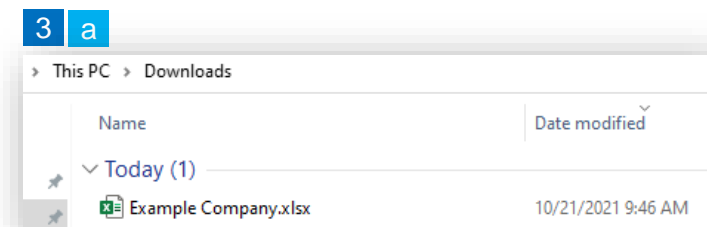
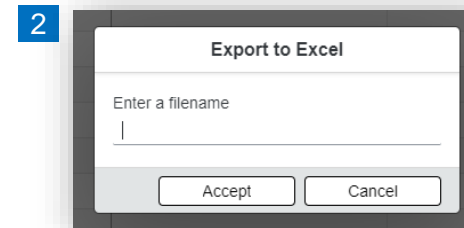
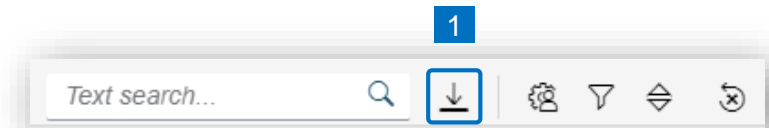
Generator's Contacts (3)

Name	Function	Phone	E-mail	Department
Emergency Response	Emergency Resp	844-873-8723		
Manifest Recipient	Manifest Recipient		dana.sulcer@tradebe.com	
Dana Sulcer	Site Contact	888-276-0887	dana.sulcer@tradebe.com	


a [+ Request Change](#) [Close](#)

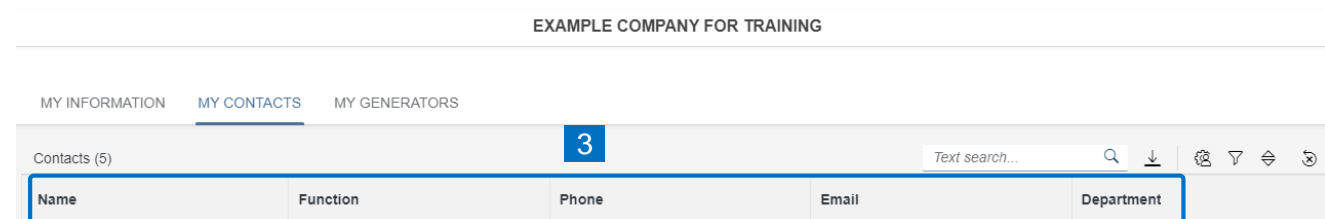
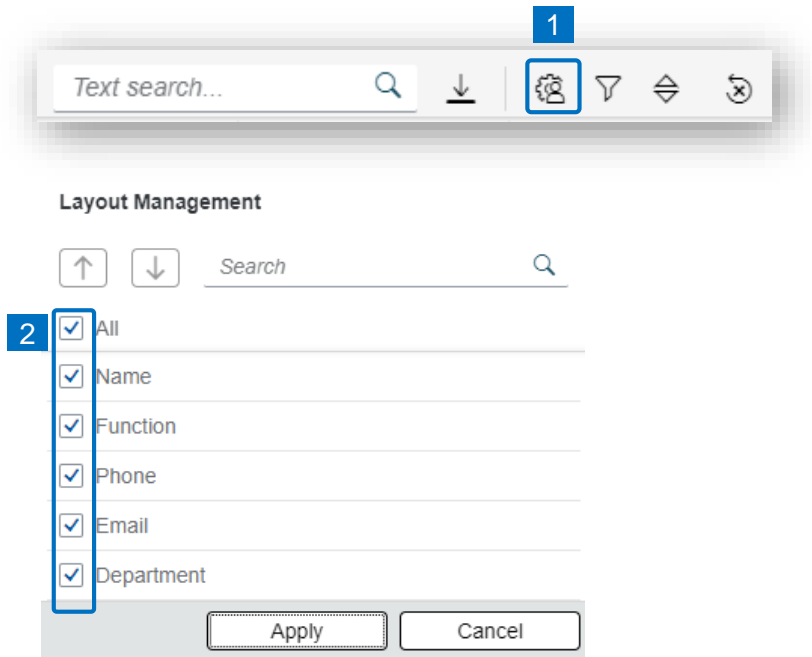
Export Contacts or Generators List

- 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**






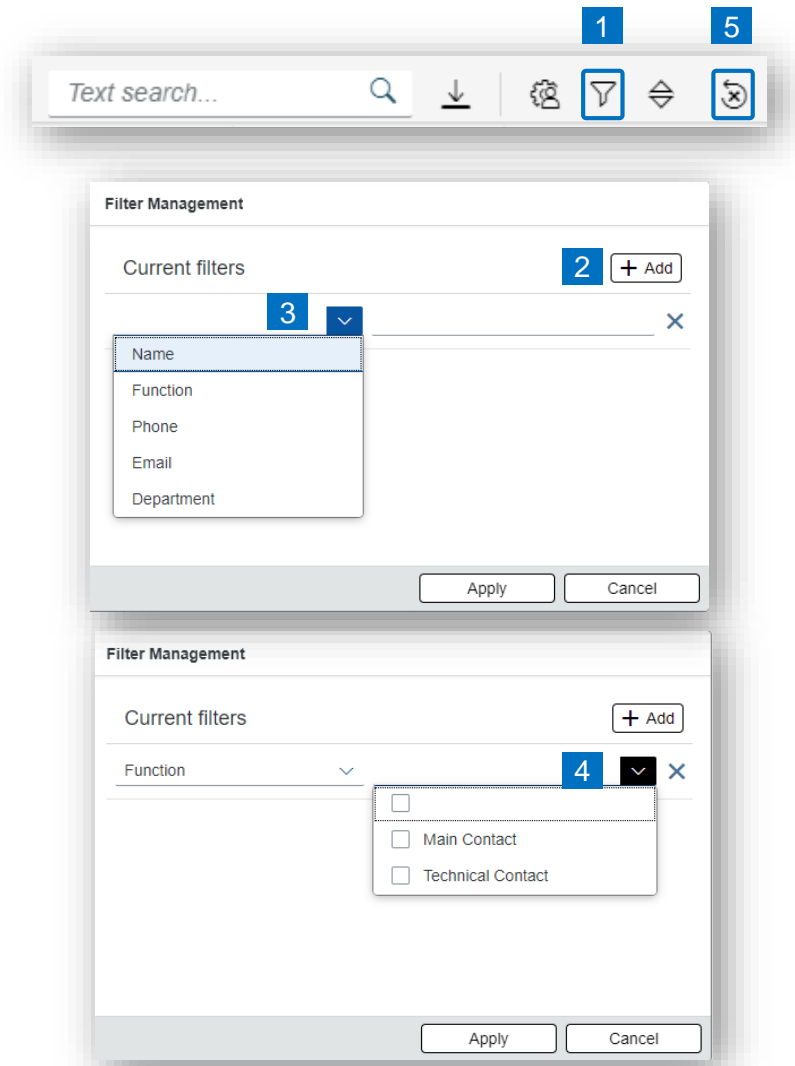
Change Layout

- 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  .



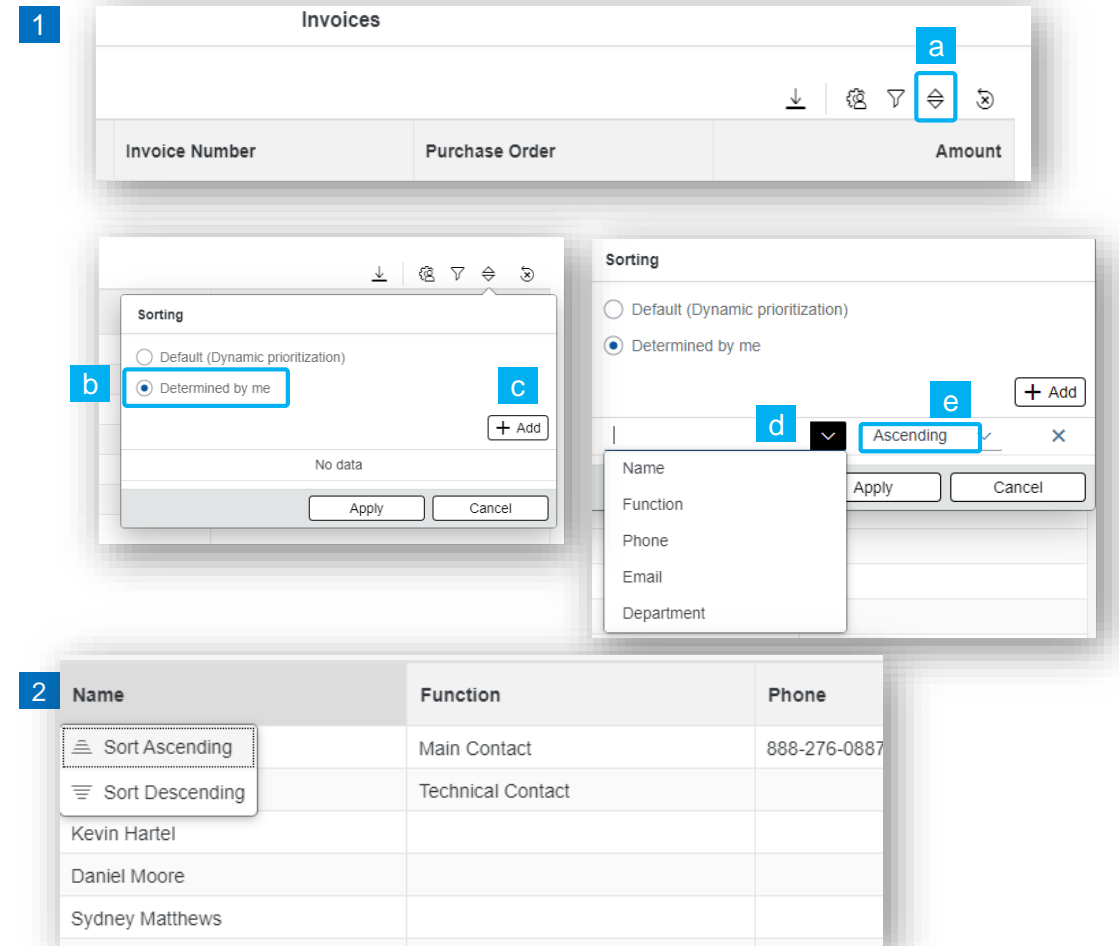
Sorting

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 icon is highlighted with 'a'. A 'Sorting' dialog box is open, showing 'Determined by me' selected with 'b', and the '+ Add' button highlighted with 'c'. A second 'Sorting' dialog box shows 'Determined by me' selected with 'd', and a dropdown menu for 'Ascending' highlighted with 'e'. A third dialog box shows a context menu for the 'Name' column header with 'Sort Ascending' and 'Sort Descending' options highlighted with '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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Sustainability at Work

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