TRADEBE CUSTOMER PORTAL

Connecting your needs

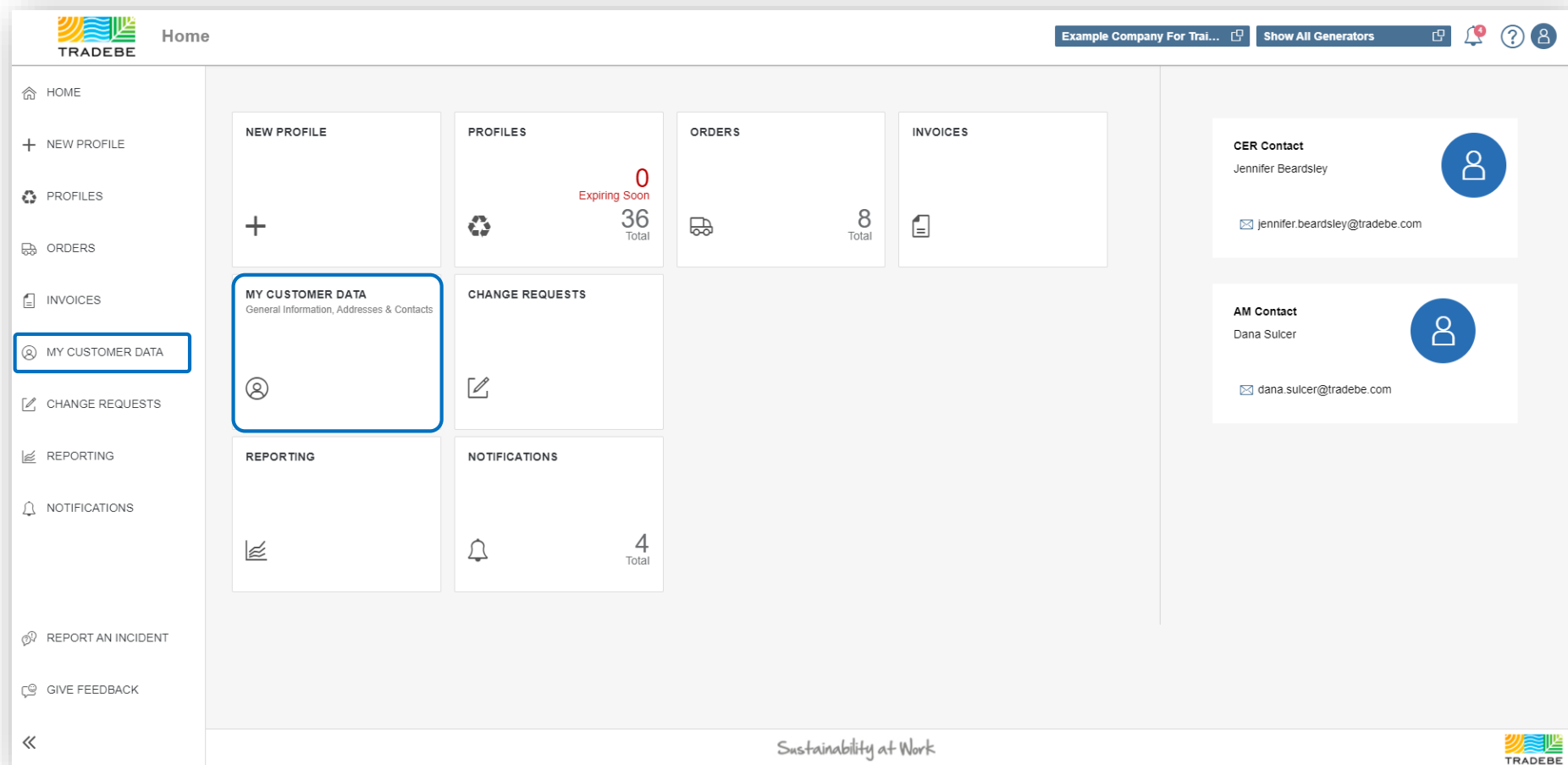# User Guide

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.

2

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 Tradebe 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 Tradebe 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".

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]
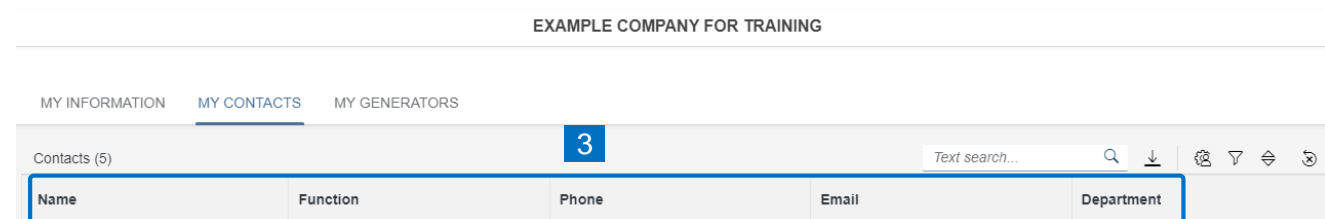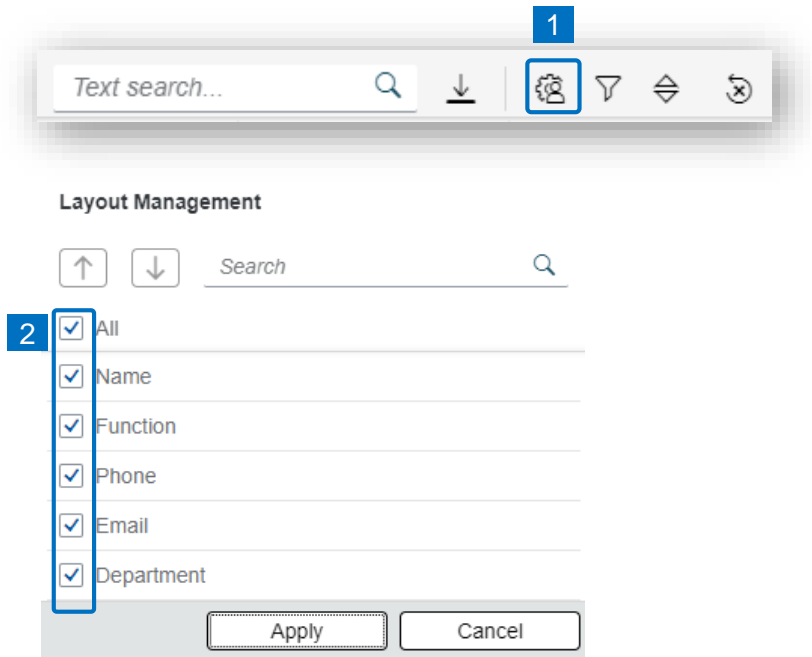It will also appear at the bottom-left of your screen when completed. [b]
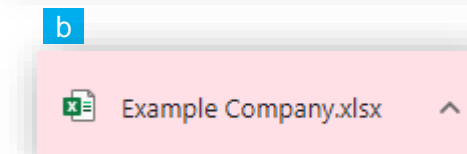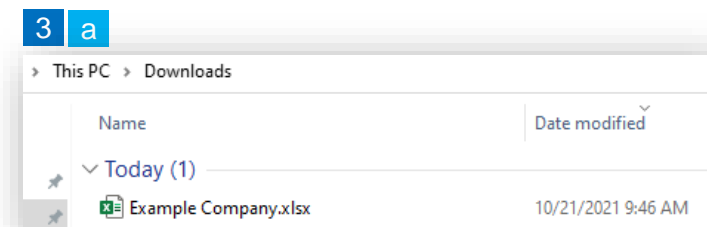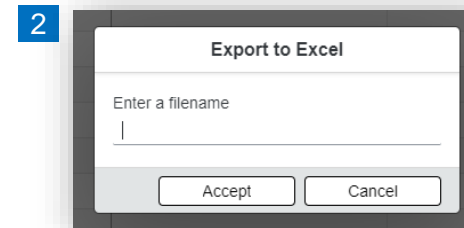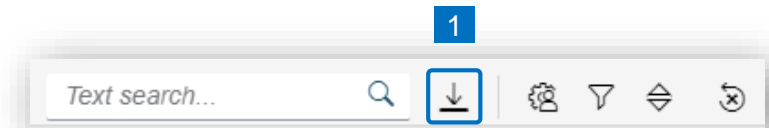
## Change Layout

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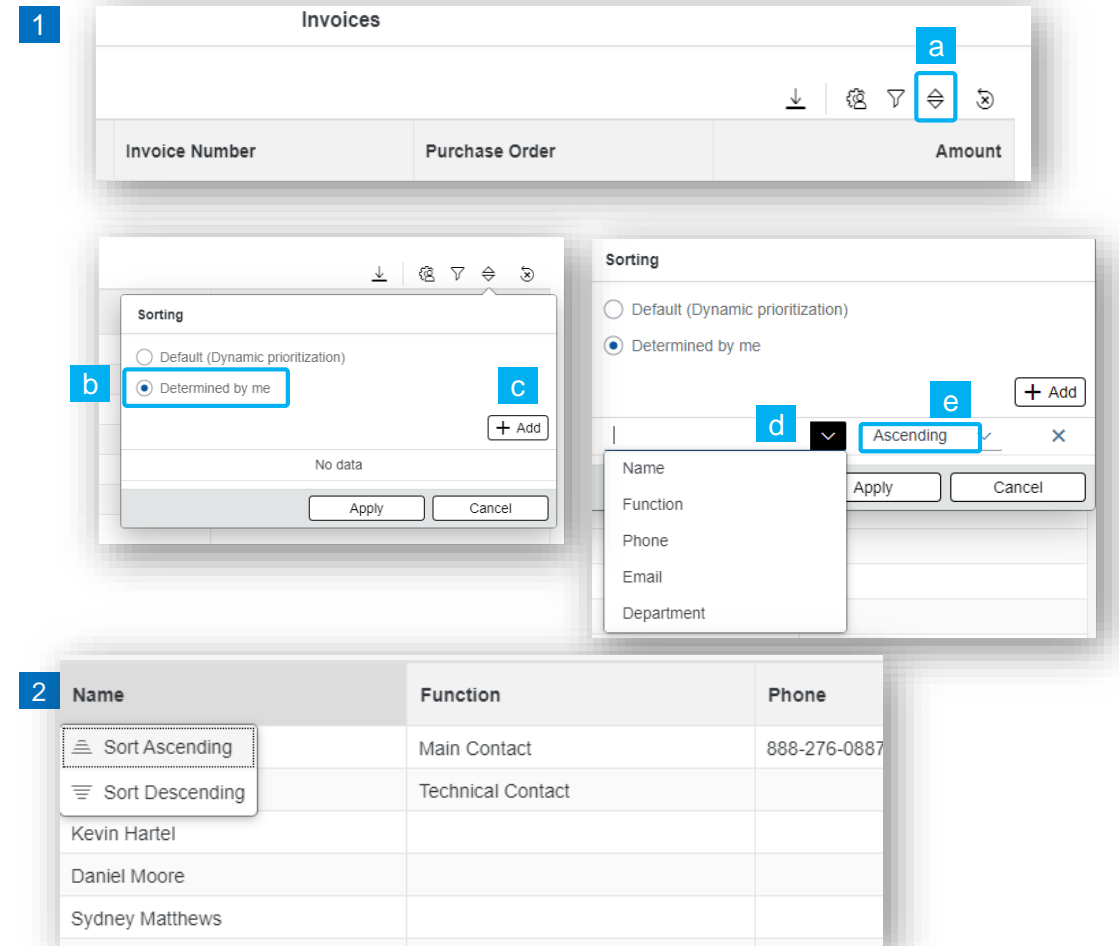
5 **To clear all filters,** click on the icon ⟲ .
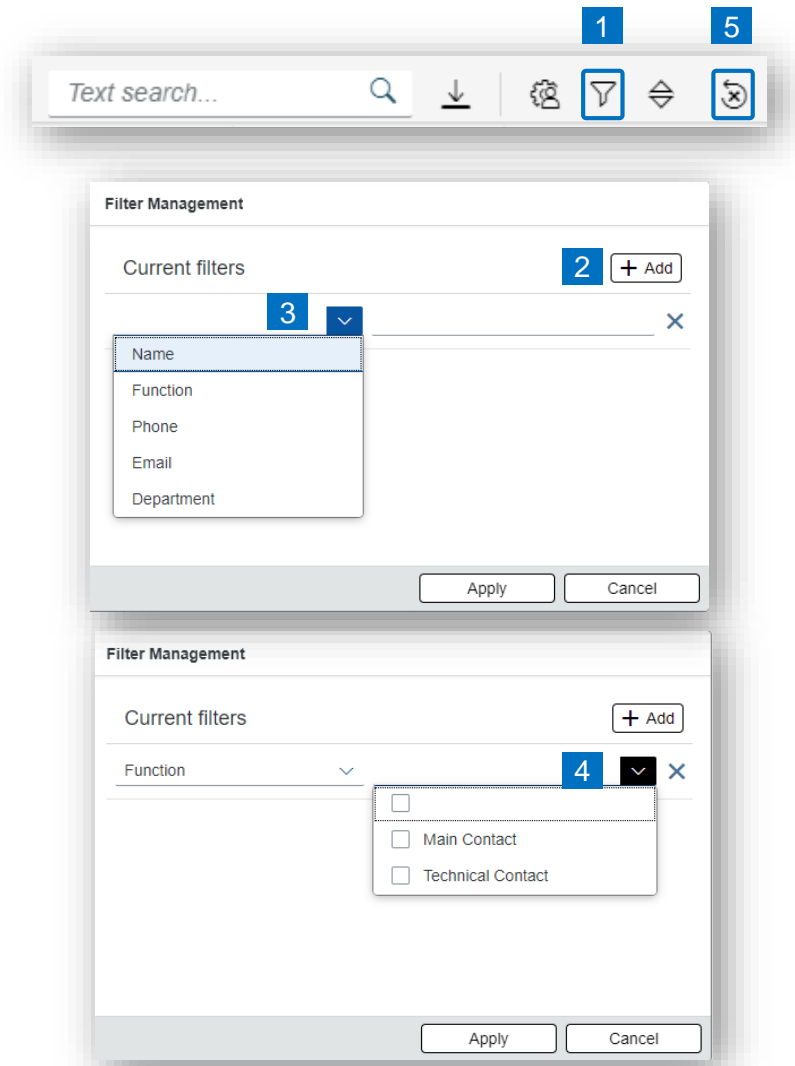
Sorting

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	Link
🗐 Invoices	Link
⊚ **My Customer Data**	*This guide*
✎ Change Requests	Link
⩘ Reporting	Link
🔔 Notifications	Link
👤 Request a New User	Link

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