TRADOGRAM
NEW USER TESTING GUIDE

Introduction and Overview

This document has been compiled to outline the fastest methods for testing the different features and solutions that Tradogram has to offer through first-hand usage.

Which features are restricted on the free Tradogram account?
The free Tradogram account only allows a single user to sign into the system at a time. Certain workflows involving multiple users may be difficult to test or unavailable on the free account, including:

- Requisition order creation
- Branch and department assignments for users
- Individual user access and permission control settings
- Multi-level approval hierarchy configuration for different document types, categories, departments, projects, and price thresholds

Additional feature restrictions on the free account include:

- Spend reporting options are limited
- Only 10 purchase orders can be created per month
- White-labelling documents with a custom company logo isn't available
- Emails that are sent to suppliers cannot be customized
- Integrations are not available (all existing integrations options with other platforms are offered free of charge to premium account holders)

Please note that while the free Tradogram account does not have a time limit, inactive accounts are cleared from the system on a regular basis.

An email notification will be provided whenever a free account is flagged as inactive.

Tradogram accounts that have been upgraded to a premium plan will never be deleted or flagged as inactive, even after the subscription period ends.

Is it possible to trial the premium version of the software?
Yes. After a demo session concludes, users who require access to premium features for more thorough testing and/or access to multiple user slots can request a premium trial period.

Schedule a demo at any time to request a premium trial once the demo concludes.

A demo session is one of the fastest ways to learn how to configure Tradogram to manage a specific workflow, and on average reduces the required testing time by up to 2-3 weeks.

Pre-Testing Configuration Steps

The steps outlined in this document should be considered a high priority for conducting an efficient and thorough testing process of the different tools on Tradogram. While these steps are not mandatory, they will provide a framework of understanding for testing the entire system.

0 - If the interface looks too cluttered, start by customizing the toolbar on the left:
Every tool featured on Tradogram can be enabled or disabled on a per-user basis. To enable/disable features for each user on the system:

1. Click on the dropdown menu at the top right of the screen, and select “Manage Company”
2. Select the “Users” tab from the panel on the left
3. Click on the “Edit Permissions” option (the key icon) under the “Actions” column on the right
4. Set the configuration option to “Deny” for any unnecessary features or modules
5. Scroll to the bottom of the page and click the “Save Permissions” button to confirm and update the configured settings

When a feature is disabled for a user, the feature will be removed entirely from view in the toolbar on the left for that user (the associated data for that feature will still be saved).

1 - Add a new test supplier profile to the database:
Every transaction created on Tradogram must be associated with a supplier.

In order to add a new supplier to the database (which can then be used for the creation of test transactions):

1. Select “Suppliers” from the left toolbar
2. Click on the “Add New Supplier” option at the top right
3. Populate the mandatory fields marked with an asterisk (*), and for the email section, enter a designated testing email address - or the email address that was used to create the account with “+Testing” between the name and the “@” symbol (for example, MyEmailAddress+Testing@DomainName.com). When adding a real supplier, populate the email address section with the address of the contact that should receive and respond to transaction documents like purchase orders, contracts, and requests
4. Scroll to the bottom of the page and click the “Save Supplier” button to confirm and save the supplier profile

Supplier profiles can have their details edited at any time once they’ve been created. Suppliers can also be deleted by contacting Tradogram support - this restriction is in place to safeguard transaction data, which will be directly tied to supplier profiles on a fully operational account.

2 - Add a new test item profile to the database:
While external (non-database) items (which can be either goods or services) may be added to one-time transactions, the item database is a useful repository for recording data on recurring purchases, and should be configured as part of completing the testing process.

In order to add a new item profile to the database:

1. Click “Items” from the toolbar on the left
2. Select the “Add New Item” option at the top right
3. Locate the suppliers list in the right-hand column, and check off the checkbox for the test supplier that was entered in the previous step. As a reminder, all items must be associated with at least one supplier in order to be a valid database selection during the creation of a transaction. If an item is not linked to at least one supplier on the system, it will not appear in the database item selection when creating a transaction
4. Enter information into the mandatory fields marked with an asterisk (*). The “Name/Classification” field can be used for the item’s name, while the fields under “Default Unit of Measurement” are used to add details about how the item is stored, measured, and delivered. For example, if the item is a pack of 6 light bulbs, the Name/Classification field would be “Lightbulb”, the Unit Label might be “Box” or “Package”, the Unit Amount would be “6”, and the Unit would be “each”. For service items, selecting a duration of time for the “Unit” field is often a good descriptive selection
5. Click the “Add Item” button at the bottom right to confirm and save the new item profile

3 - Final notes before testing the system:
With at least one supplier and item profile configured, Tradogram is ready to be tested using a variety of different available workflows. Before getting started, there a few important notes to keep in mind while testing:

- Each web browser (Google Chrome, Firefox, Internet Explorer, Safari, ect.) can only be logged into from a single Tradogram account at a time. Because opening transaction documents from the view of a supplier (received at a testing email address) is considered to be logging into a separate account, always use an entirely separate browser (an incognito window can also be used) to open the test emails containing transaction documents. If a different browser isn’t used to open the supplier testing email(s), the included link(s) will be directed to a page stating “You are not authorized to view that page.”
- If different testing email addresses are being used, or multiple test emails are being opened for different test suppliers in a single session, it’s possible that a blank “Unauthorized” page may be encountered. In order to navigate away from this page, click the letter “i” in the bottom-left of the screen and select the “Logout” option to reset the browser’s cached login status.

Workflow Testing Options

Ready to start testing?

Visit tradogram.com/resources/knowledge-base/user-guide/ for more workflow guides.

Available workflows for testing on a free account:

- Testing purchase order, invoice, and delivery entry (Purchase to Pay Solution)
- Testing request (RFX) creation (Strategic Sourcing and Negotiation Solution)
- Testing contract creation (Contract Management Solution)
- Requisition creation (Multiple Solutions)
- Approval configuration (Spend Control Solution)