

Shared company information

TradePort – Workgroup manual

TradePort workgroup

The workgroup function in TradePort enable your company-wide users to collaborate on applications and share information between accounts. This feature is available for TradePort company administrators only.



- Manage account
- Change password
- Sign out

Choose "Manage account"

Scroll down the “Manage account” page and click “Create workgroup”



Transfer admin

Select the user who you want to transfer your admin role to

Select colleague



Add new admin

Select the user who should have admin permissions

Select colleague



Remove admin

Select the user to remove admin privileges from

Select colleague



No workgroups created

Click below to create your first

Create workgroup



Remove my account

You will not be able to login again.

Remove

Name your workgroup

Create workgroup

Workgroup name

Save Cancel

Click "Save"

In this menu you will find your active workgroups

Test

+

Create workgroup

▼ Add colleague to this workgroup

🗑 Delete workgroup

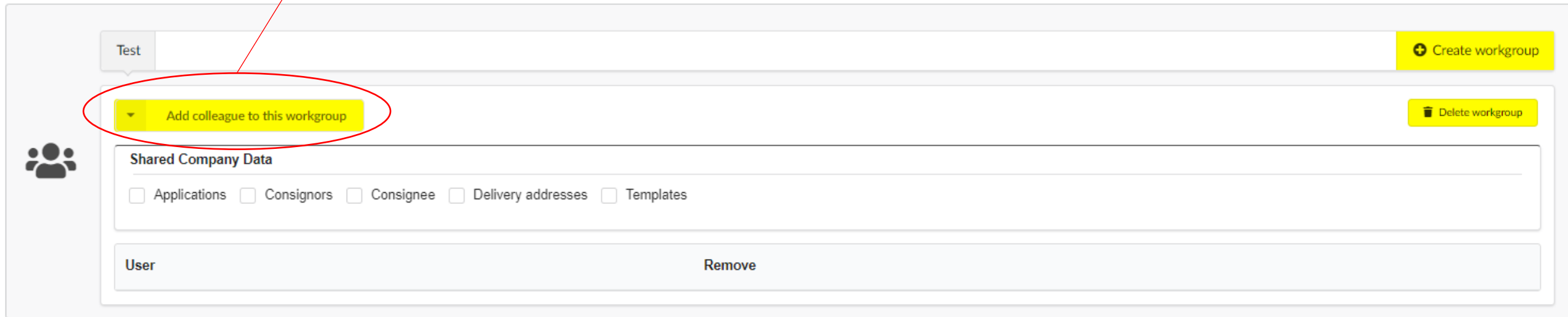
Shared Company Data

Applications Consignors Consignee Delivery addresses Templates

User

Remove

Choose the colleagues within the organization that you want to include in the workgroup (they need to have a TradePort account connected to your company).



The screenshot shows a user interface for managing a workgroup. At the top left, there is a search bar containing the text "Test". To the right of the search bar is a yellow button with a plus icon and the text "Create workgroup". Below the search bar, there is a yellow button with a downward arrow and the text "Add colleague to this workgroup", which is circled in red. To the right of this button is another yellow button with a trash icon and the text "Delete workgroup". On the left side of the interface, there is a user icon consisting of three stylized figures. Below the "Add colleague" button, there is a section titled "Shared Company Data" with a horizontal line underneath. Under this line, there are five checkboxes: "Applications", "Consignors", "Consignee", "Delivery addresses", and "Templates". At the bottom of the interface, there is a light gray bar with the text "User" on the left and "Remove" in the center.

You can remove members of a workgroup by clicking this button.

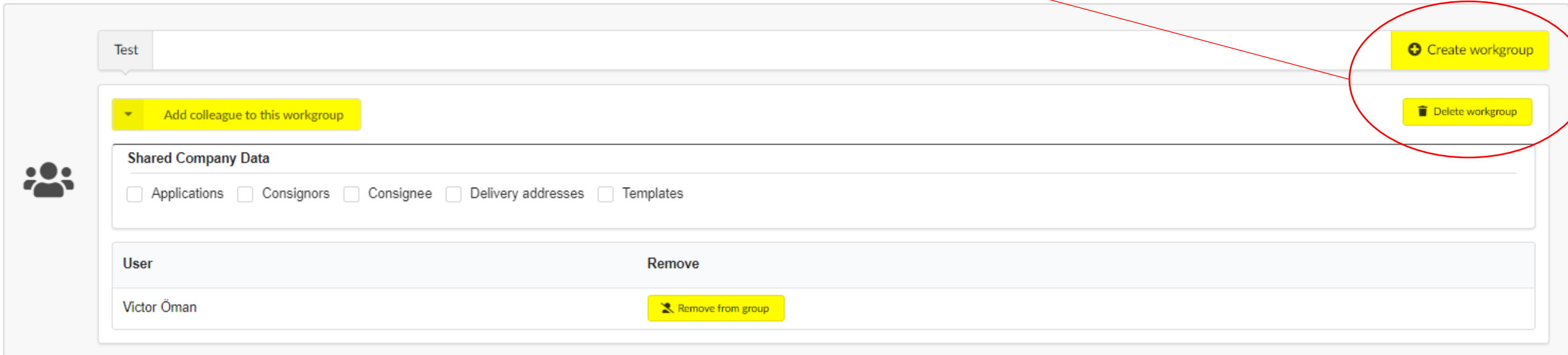
The screenshot shows a web interface for managing a workgroup. At the top left, there is a tab labeled "Test" and a yellow button with a plus icon and the text "Create workgroup". Below this is a yellow button with a dropdown arrow and the text "Add colleague to this workgroup", and a yellow button with a trash icon and the text "Delete workgroup". A section titled "Shared Company Data" contains five unchecked checkboxes: "Applications", "Consignors", "Consignee", "Delivery addresses", and "Templates". Below this is a "User" section with a header "Remove" and a list of users. The first user is "Victor Öman", and next to his name is a yellow button with a trash icon and the text "Remove from group". This button is circled in red, and a red line points from the text above to it.

In this menu you can choose what information that will be shared among the members of the workgroup

The screenshot shows a web interface for managing a workgroup. At the top left, there is a tab labeled "Test". To the right of the tab is a yellow button with a plus icon and the text "Create workgroup". Below the tab is a yellow button with a dropdown arrow and the text "Add colleague to this workgroup". To the right of this button is another yellow button with a trash icon and the text "Delete workgroup". On the left side of the interface, there is a grey sidebar with a group of three people icon. The main content area is divided into two sections. The first section is titled "Shared Company Data" and contains five checkboxes: "Applications", "Consignors", "Consignee", "Delivery addresses", and "Templates". This section is circled in red. The second section is titled "User" and contains a table with one row. The table has two columns: "User" and "Remove". The row contains the name "Victor Öman" and a yellow button with a trash icon and the text "Remove from group".

User	Remove
Victor Öman	Remove from group

Here you can choose if you'd like to delete a workgroup or create a new.



The screenshot shows a user interface for managing a workgroup. At the top left, there is a tab labeled "Test". Below it, a yellow button with a dropdown arrow says "Add colleague to this workgroup". To the right of this button, a red circle highlights two yellow buttons: "Create workgroup" (with a plus icon) and "Delete workgroup" (with a trash icon). Below these buttons is a section titled "Shared Company Data" with five checkboxes: "Applications", "Consignors", "Consignee", "Delivery addresses", and "Templates". At the bottom, there is a table with two columns: "User" and "Remove". The table contains one row with the name "Victor Öman" and a yellow button labeled "Remove from group" with a trash icon.

User	Remove
Victor Öman	Remove from group