Onboarding: Getting Started with Tradeshift

Create Your Company Profile and Learn How to Invoice via Tradeshift

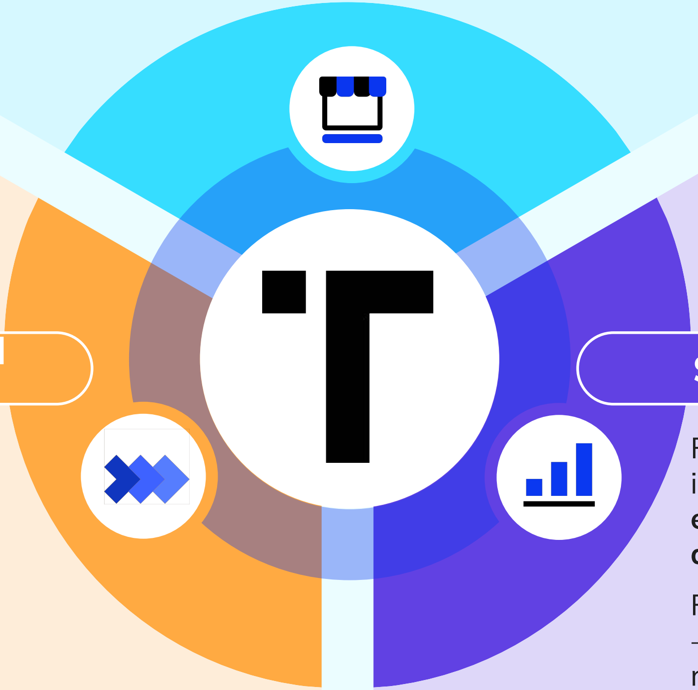
Tradeshift

… is the platform that redefines the way buyers and suppliers connect, transact and grow.

Our Vision

To connect every company in the world,
creating economic opportunity for all.

Tradeshift
brings simplicity, connectivity and a B2C like experience to B2B commerce.



Buy better

From outdated **procurement** → buying through **B2B marketplaces.**

Pay & get paid better

From waiting months to get paid and bureaucratic process to get a loan → **same day payments, invoice finance, cards** and **pre-qualified working capital solutions.**

Sell better

From sending paper invoices → **touchless e-invoice processing and storage.**

From high CAC → expanding sales reach at lower cost by **selling on a B2B marketplace.**

Tradeshift improving B2B Commerce since 2010

e-Invoicing

Automate & digitise sending and receipt of invoices

Supplier Financing

Embedded invoice financing with HSBC

B2B Marketplaces

Join a marketplace or create one

Collaboration & Onboarding

Supplier or Buyer

AP Automation

Control & compliance with AI-supported automation

Virtual Credit Cards

Virtual cards powered by AMEX and VISA

Agenda

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    b. Update Company Profile
    c. Network Connection with Your Customer
2. WebUI Solution
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    b. The ‘CREATE’ Launcher
    c. Common Error and Solutions
3. Document Manager
    a. How to Read Document Status
    b. Customizing the table
4. How to Reach Support
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    b. Your Customer’s Landing Page
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5. FAQs

Tips: Click on the title to view the relevant topic

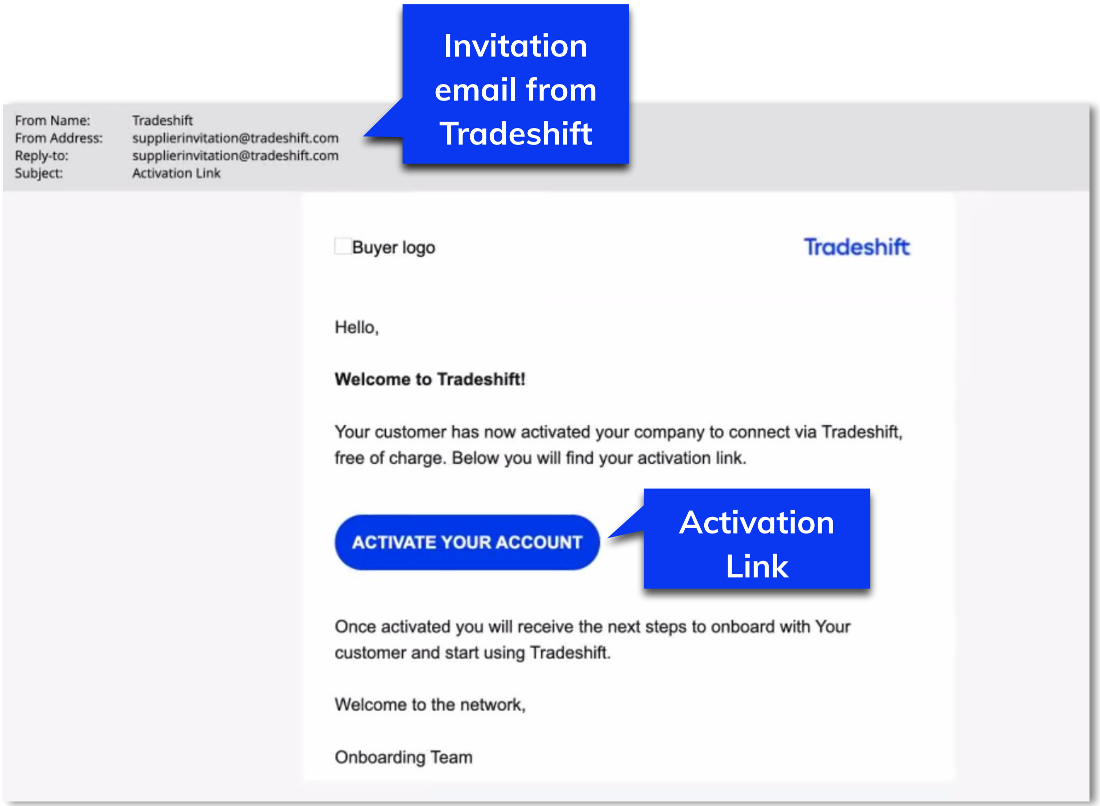
01

Setting Up Your Account and Company Profile

Account Activation

Please ensure you use the Activation Link provided in the invitation email.

- If you could not find the email, search in the junk/spam mailbox.
- If you did not receive the email, you can raise a Support Ticket via: https://support.tradeshift.com/requests/new. Please provide your Company Name and Vendor No. in the Ticket.


From Name: Tradeshift
From Address: supplierinvitation@tradeshift.com
Reply-to: supplierinvitation@tradeshift.com
Subject: Activation Link

Buyer logo
Tradeshift

Hello,

Welcome to Tradeshift!

Your customer has now activated your company to connect via Tradeshift, free of charge. Below you will find your activation link.

ACTIVATE YOUR ACCOUNT

Once activated you will receive the next steps to onboard with Your customer and start using Tradeshift.

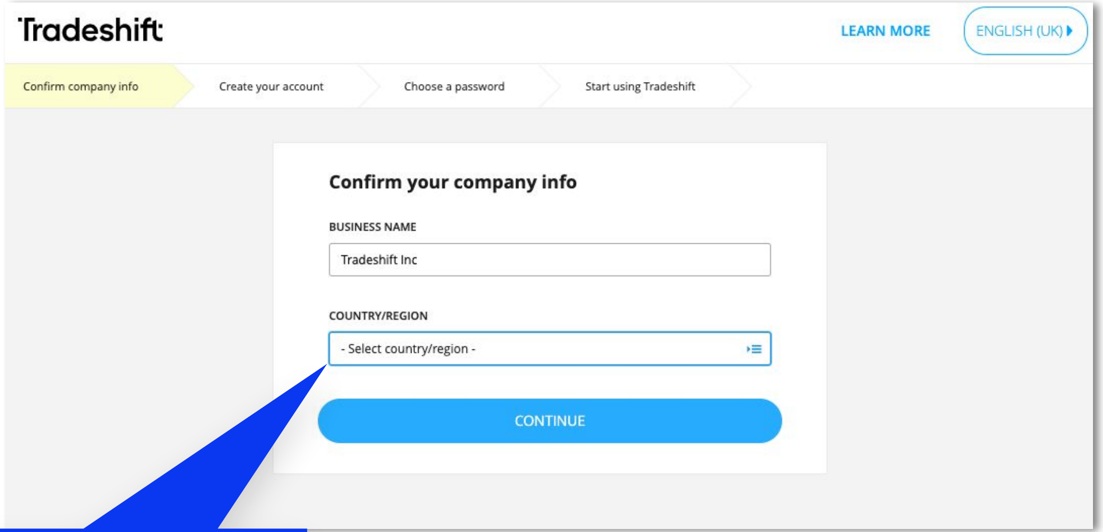
Welcome to the network,

Onboarding Team

Account Activation

Complete your company information during the registration of account:

- Business Name
- Country/ Region (where you are tax registered)



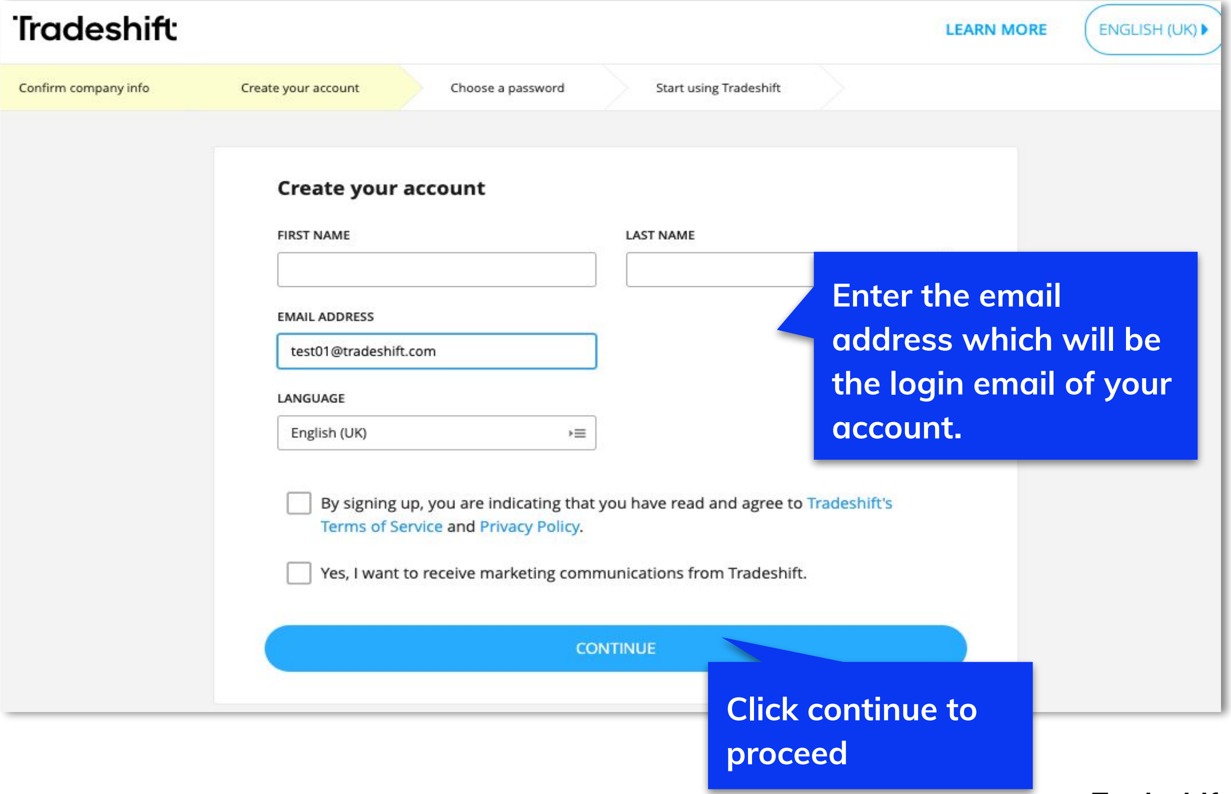
Please make sure you select the correct Country/ Region. It cannot be edited once you have registered the account.

Account Activation

Next, complete your personal information and email address (as the login email).

You will receive an email from Tradeshift to verify your account. Please proceed with the verification immediately.

⚠️ If you could not find the email in the mailbox, please look through the junk/ spam folder.

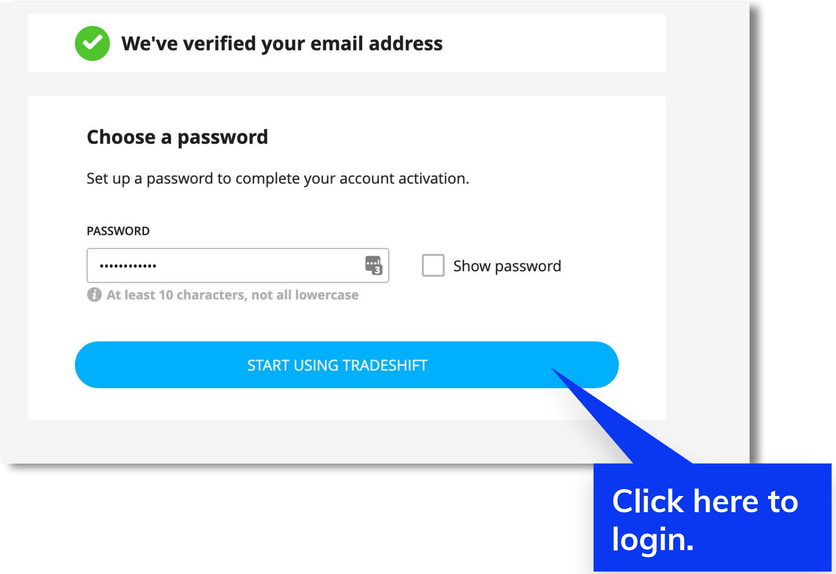


Account Activation

Once the email address is verified, you can then create the password for your account.

You will be able to **login to Tradeshift** with the **registered email address** and **password after this!**

Login Page: go.tradeshift.com

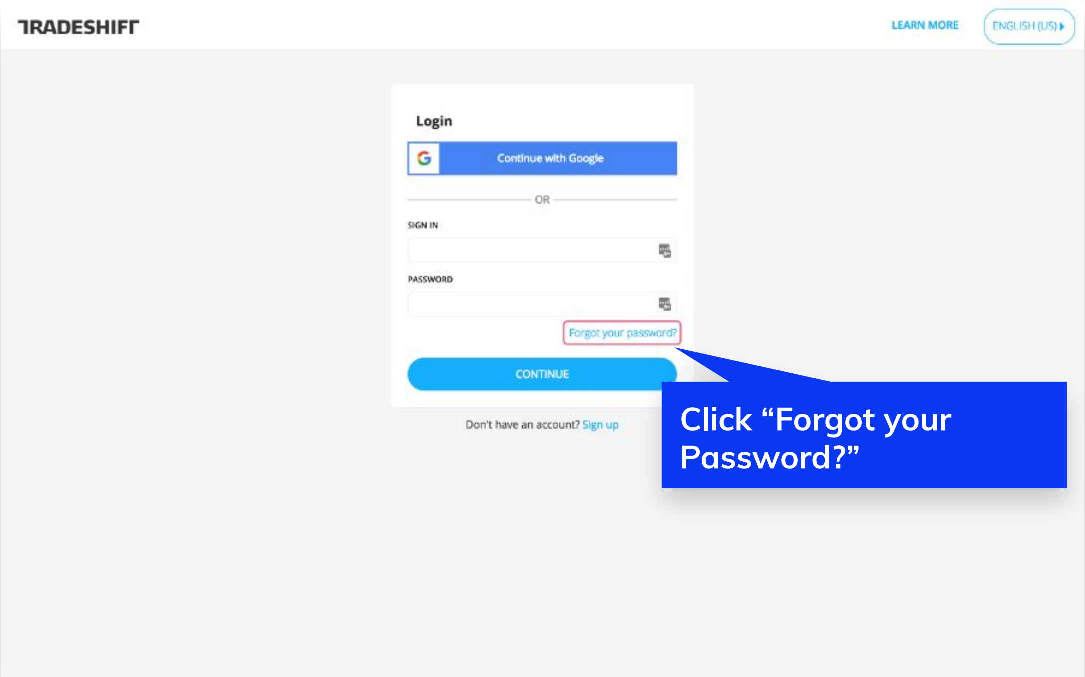


Tradeshift

Quick Tips

I forgot my password. How do I reset it?

- From the login page, click on the "Forgot your password?" link.
- You will be taken to the "Forgot your password?" page. enter your Email address in the field and click "Send Instructions".



Update
Company Profile

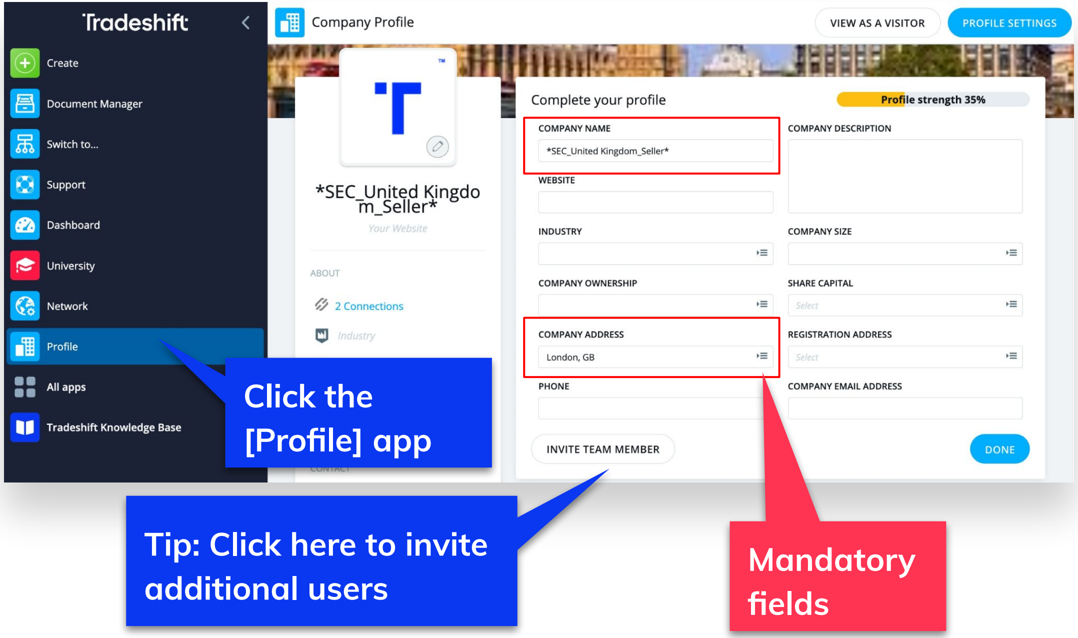
Please ensure the details in your Company Profile are updated before you kick-start the invoicing process by filling in the columns as below:

Mandatory:

- Company Name
- Company Address (Full)
- Company Identifiers (Business registration number, Tax/ VAT ID)

Optional:

- Company Logo
- Industry
- Phone
- Company Email Address



Update Company Profile

Please ensure the “Company Identifiers” section in your Company Profile is updated

Company ID/ Business Registration Number and/or **Tax/ VAT ID** must be updated in the Company Profile.

Invoices **will NOT be submitted successfully** if these mandatory fields are not updated.

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Network Connection with Your Customer

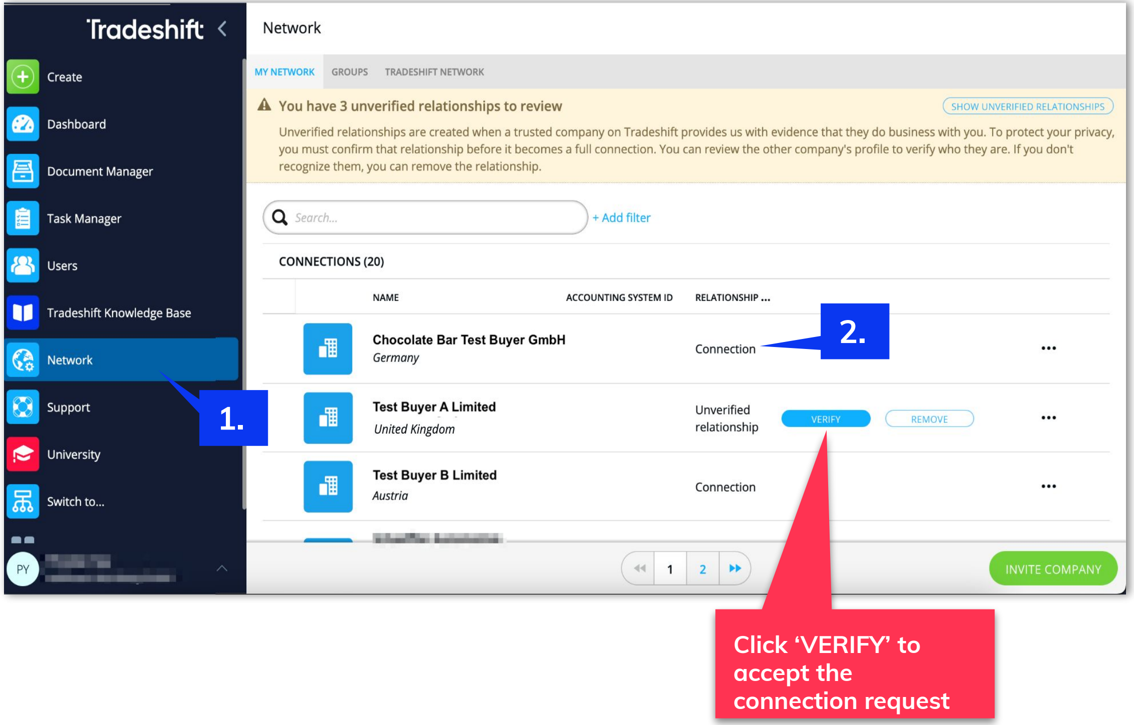
Next step: Make sure your account is connected to your Customer.

1. Go to **'Network'**

2. Under '**My Network**' tab, make sure the Relationship Status with your Customer is reflected as '**Connection**'.

   ➢ For existing Tradeshift users: if the Relationship Status is reflected as 'Unverified relationship', click **VERIFY** to accept the connection request.

   ➢ If you could not see any connection, please contact our Support team via Chat or https://support.tradeshift.com/requests/new



Tradeshift Platform Walkthrough

02

WebUI Solution

PO Flip Method

Applicable to sellers who receive POs from buyer

How to Flip Documents

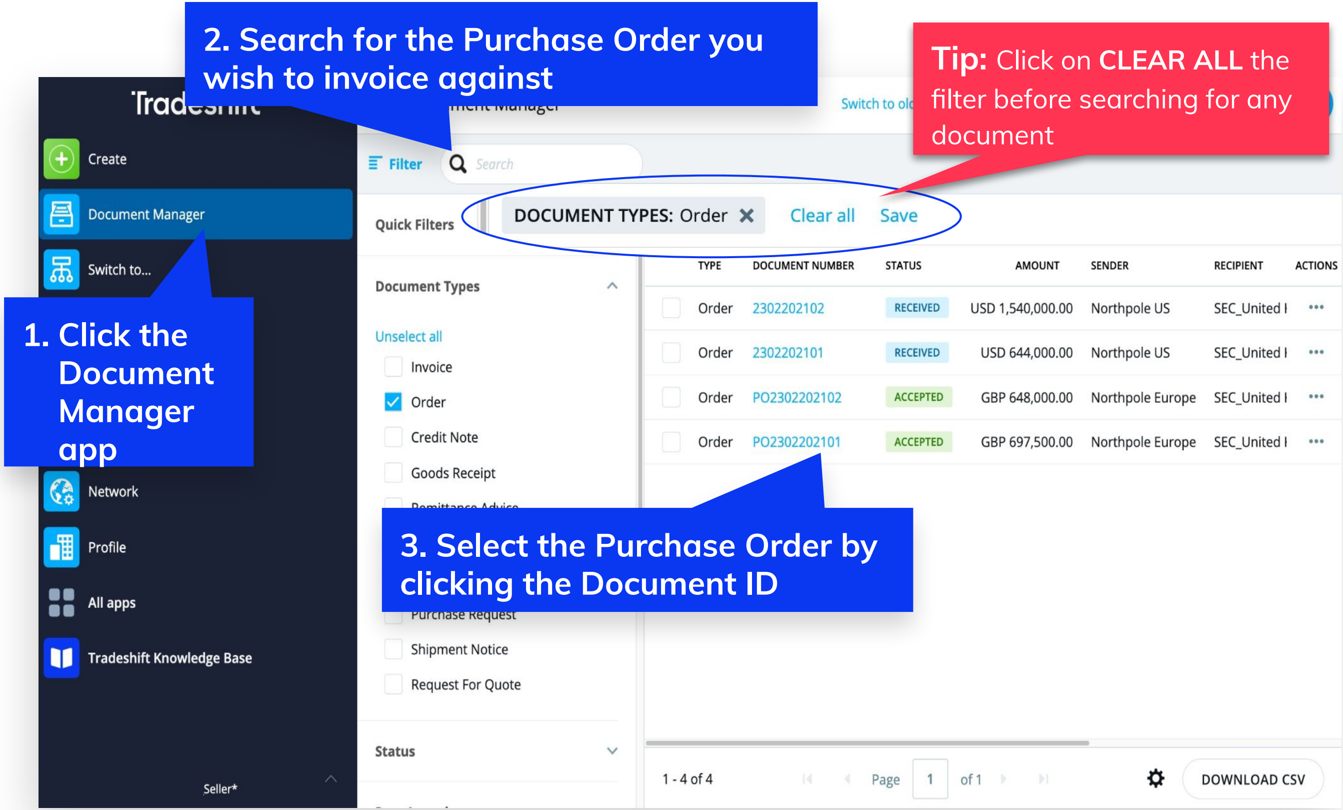
Do you know?

Search a **Purchase Order** for **PO flip:**

PO flip means that you are generating an Invoice.

Search an **Invoice** for **Invoice flip:**

Invoice flip means that you are generating a **Credit Note.**



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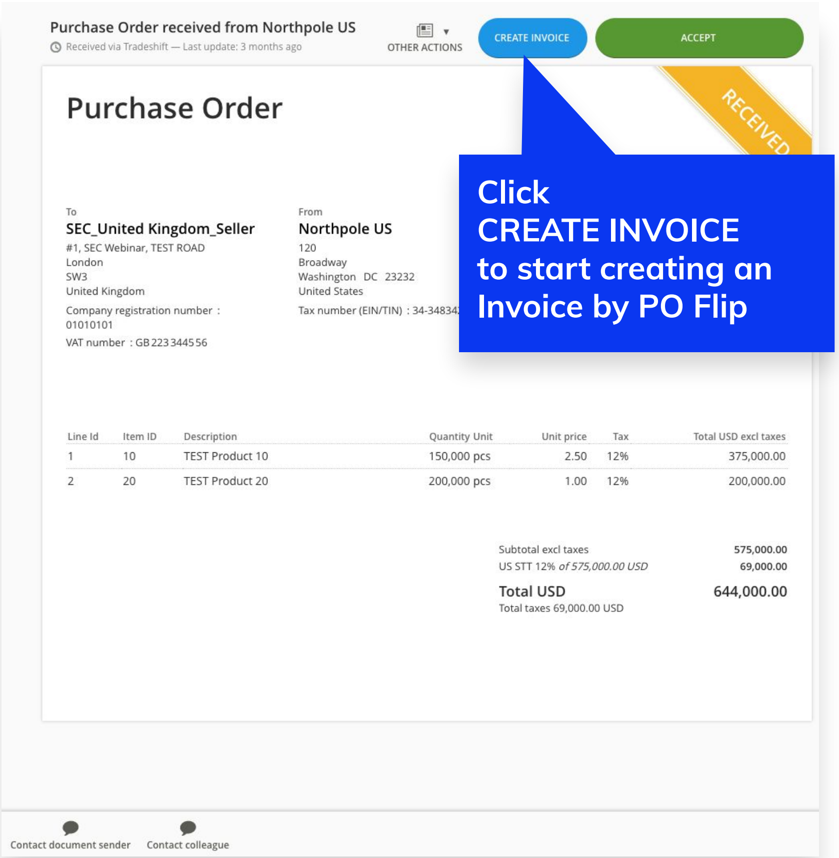
PO Flip Method

Always ensure all details are accurate before flipping any documents.

Click ACCEPT as confirmation of the PO.



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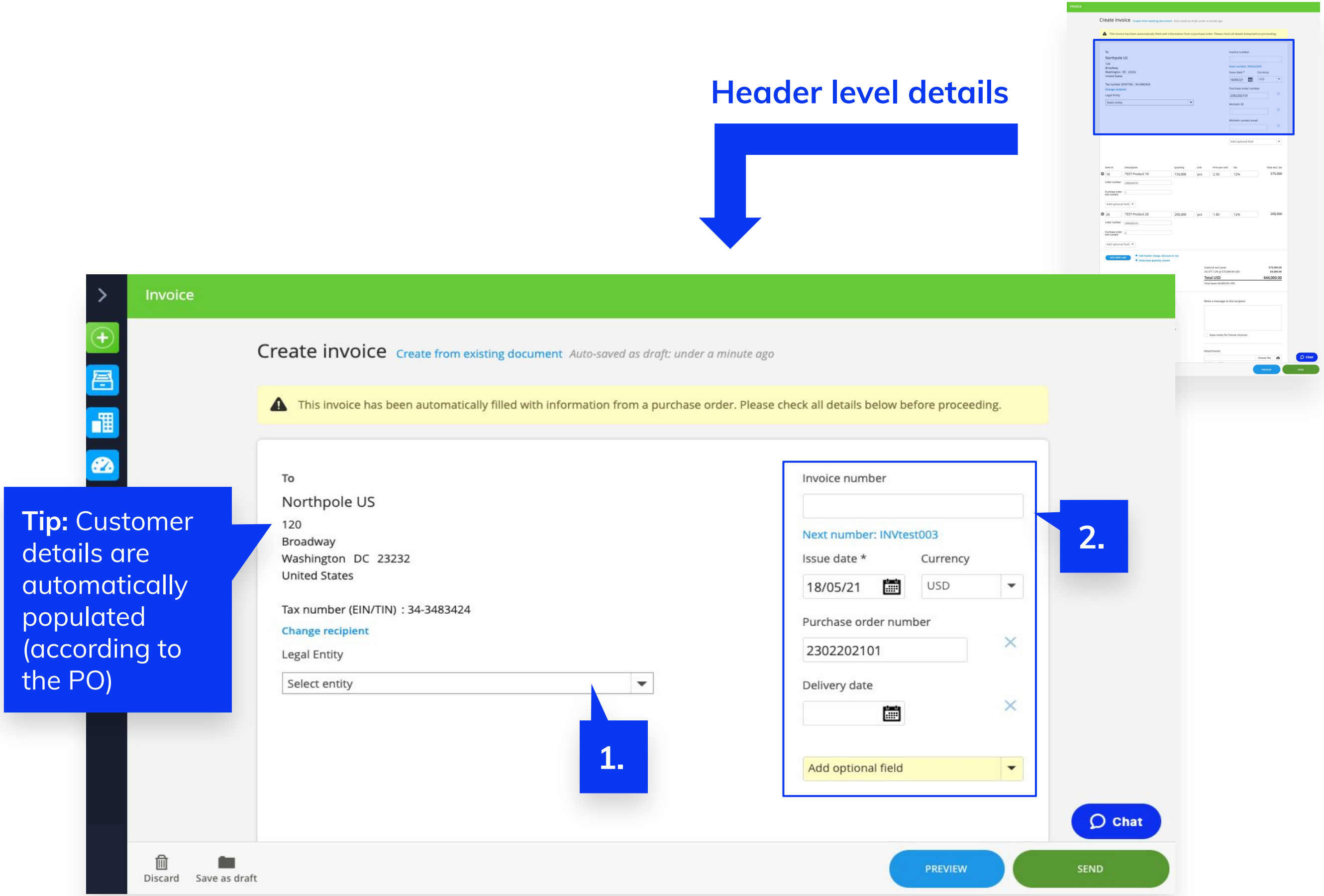
Creating an Invoice using PO Flip Method

1. Select the Legal Entity from the dropdown list **(applicable to certain Customers)**

2. Fill in the **mandatory fields** such as:

   - Invoice Number
   - Issue Date
   - Date of goods delivery *
   - Payment Due Date
   -

   Note: Mandatory fields will reflect automatically

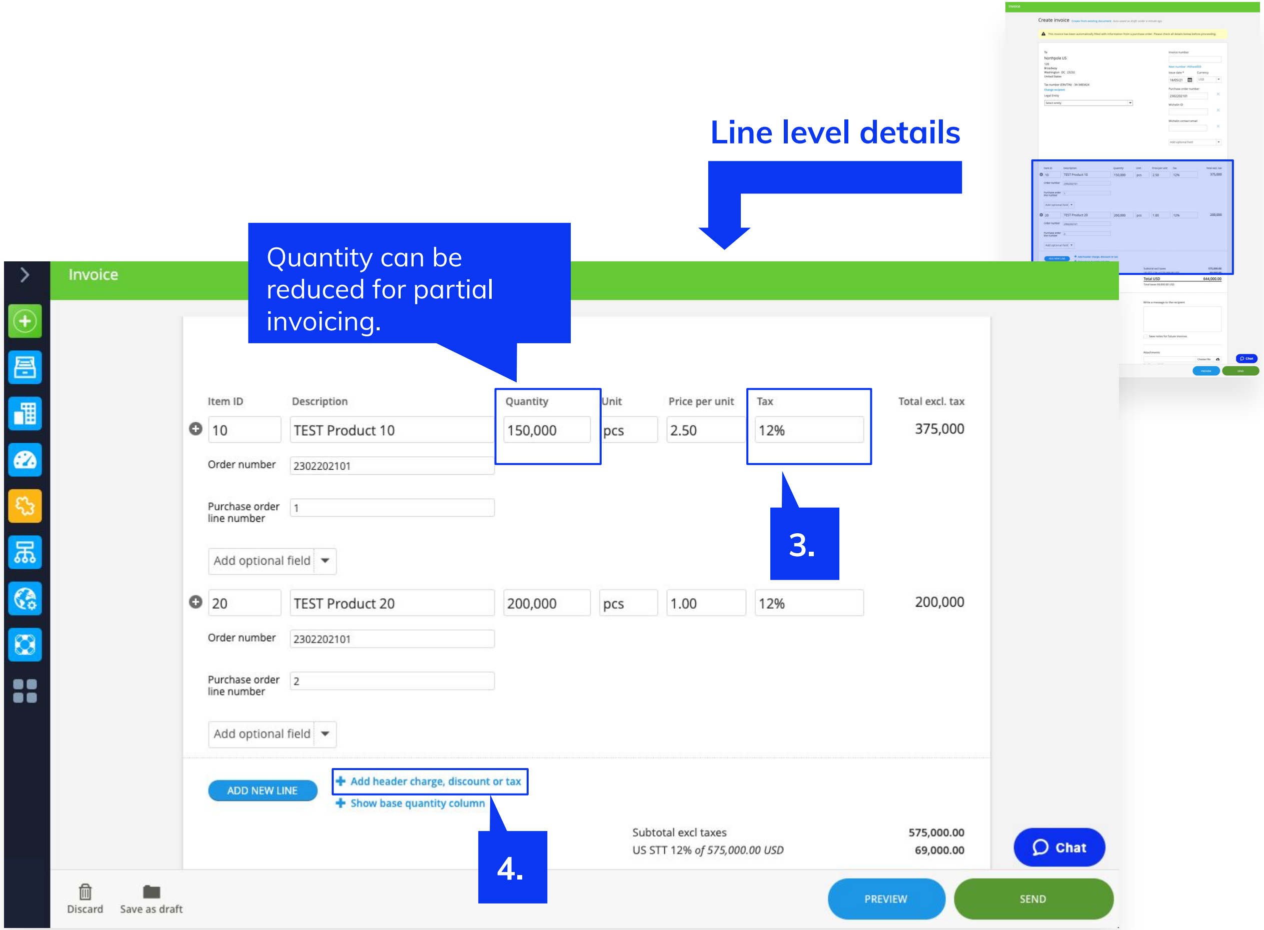


Creating an Invoice using PO Flip Method

3. Choose a Tax % from the list

4. Click to add additional charge (ie. Freight), discount or separate tax charge.

Majority of the details at line level are generated based on the PO. **DO NOT amend the details** except the Tax % and Quantity (for partial invoicing only).



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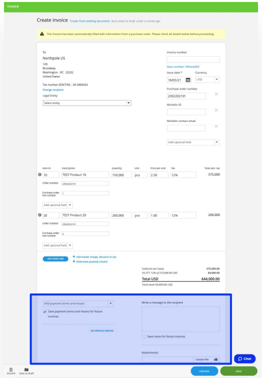
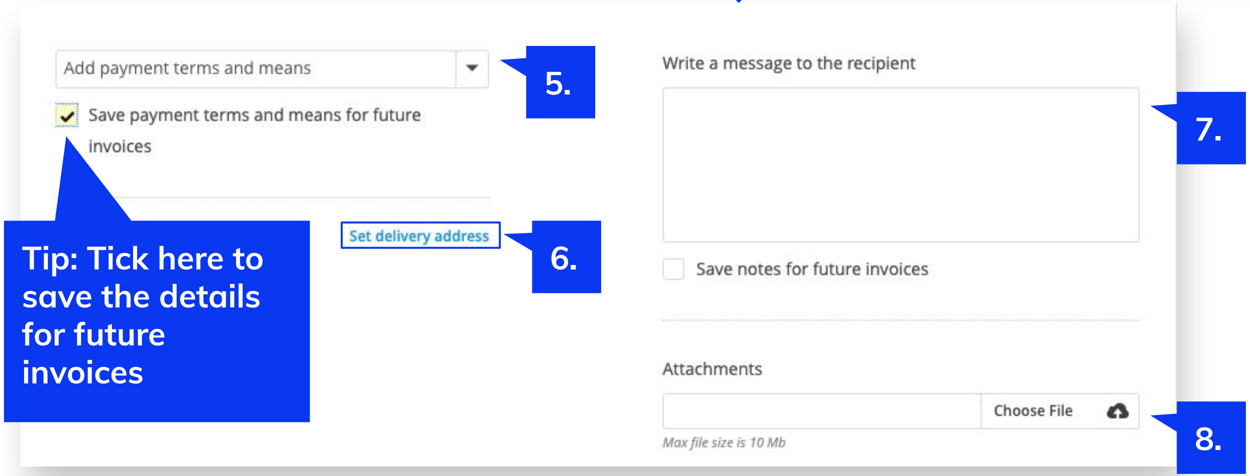
Creating an Invoice using PO Flip Method

5. Click here to select a payment method. Mandated by certain Customers.
6. Click here to insert the Delivery Address. Mandated by certain Customers.
7. (Optional) Leave a note to your Customer
8. (Optional) Upload a document as additional reference



Bank details and attachments



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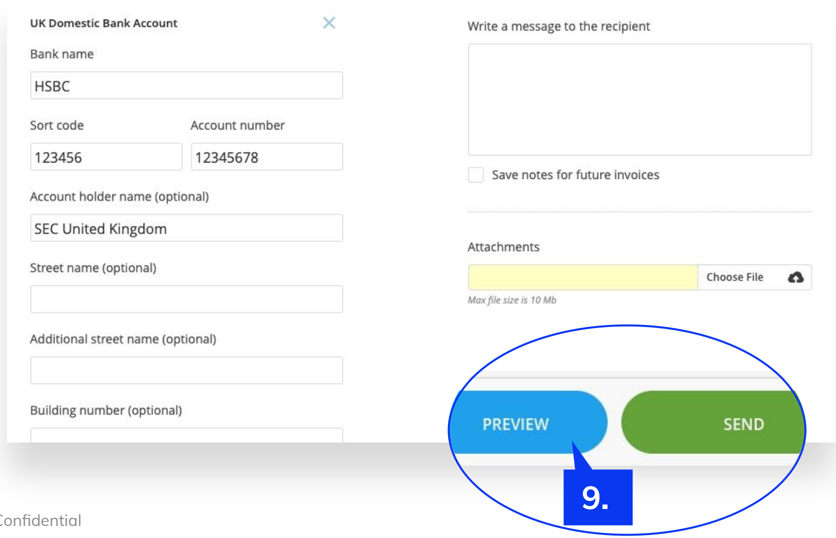
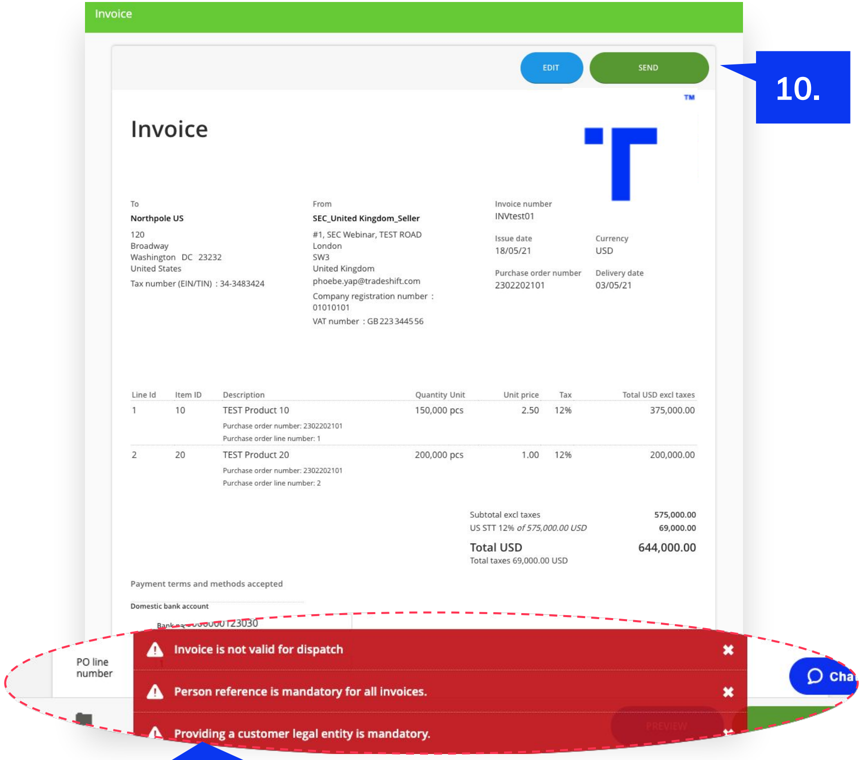
Creating an Invoice using PO Flip Method

9. Click **PREVIEW** to verify the details

10. Click **SEND**

⚠️ You CANNOT amend or discard the copy after you have sent the Invoice.





⚠️ You will see error messages (in red) at the bottom of the page if your document is incomplete. In this case, follow the instruction and insert the details to fix the error(s).

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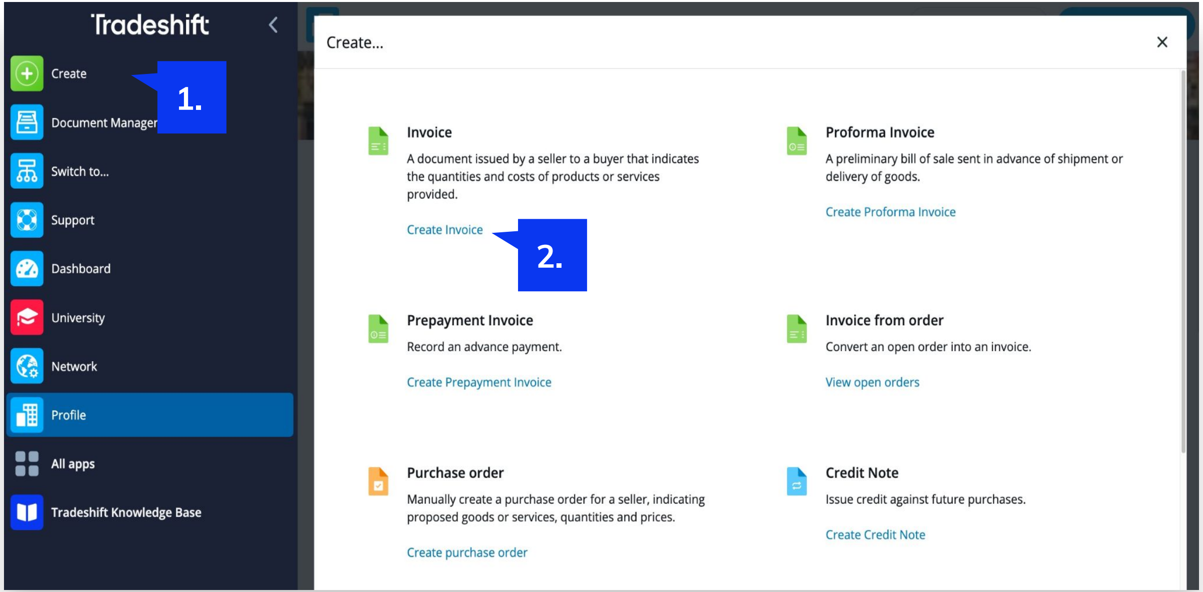
CREATE Launcher

Applicable to Non-PO sellers (sellers who invoice without a PO)

How to invoice from the CREATE Launcher

You can create an Invoice **without a PO** via the **CREATE** Launcher.

1. Click the **Create** app
2. Click on "Create Invoice"



How to invoice from the CREATE Launcher

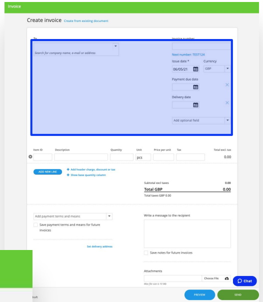
3. Search your Customer's name, then choose the Legal Entity.

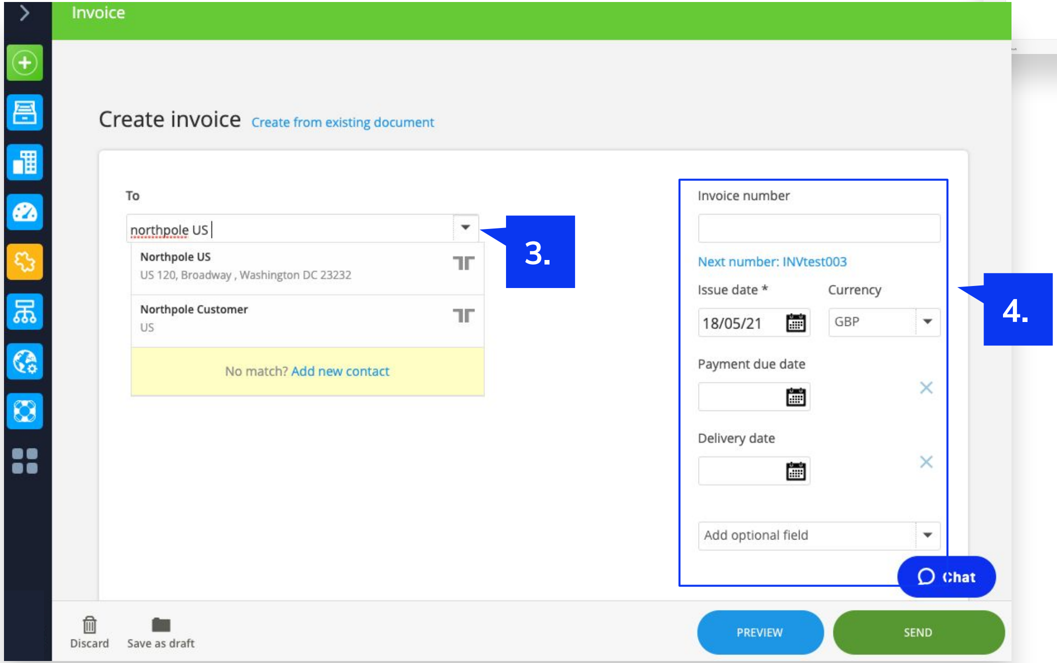
4. Fill in the **mandatory fields** such as:

   - Invoice Number
   - Issue Date
   - Delivery Date
   - Payment Due Date
   - Person Reference

   Note: Mandatory fields will reflect automatically.

Header level details





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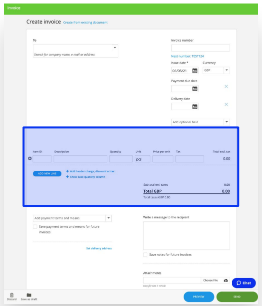
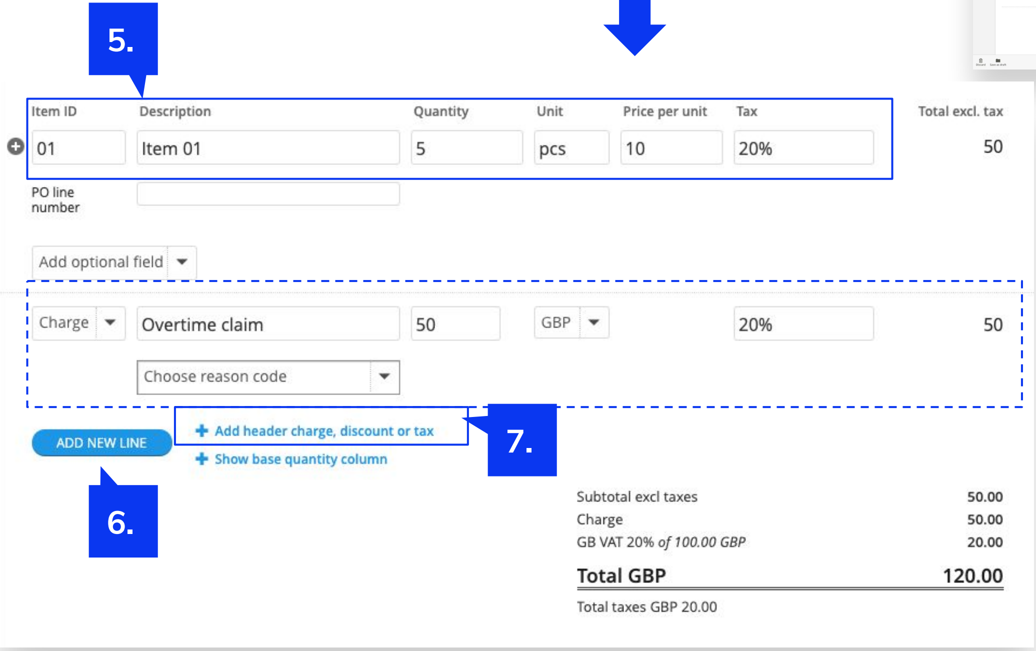
How to invoice from the CREATE Launcher

5. Fill in the line details and Tax %
6. Click “ADD NEW LINE” for additional line item
7. Click here to insert additional costs or discount (if any)





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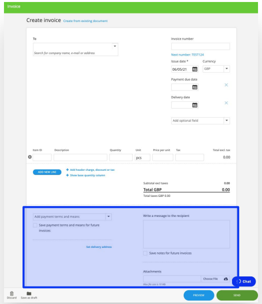
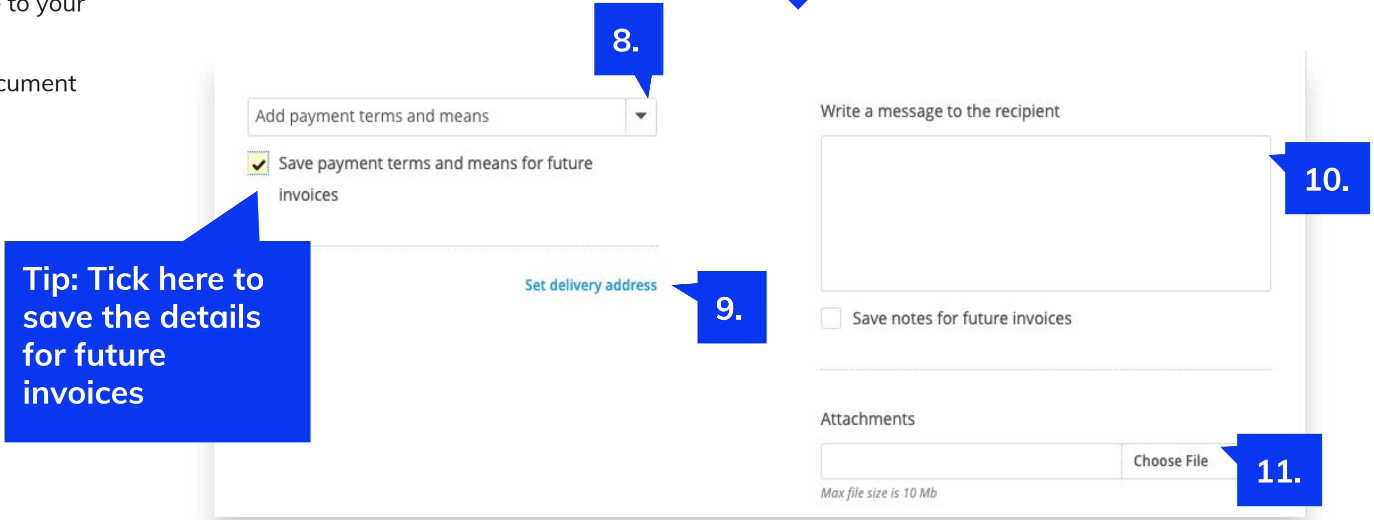
How to invoice from the CREATE Launcher

8. Click here to select a payment method. (Mandated by certain Customers).
9. Click here to insert the Delivery Address. (Mandated by certain Customers).
10. (Optional) Leave a note to your Customer
11. (Optional) Upload a document as additional reference



Bank details and attachments



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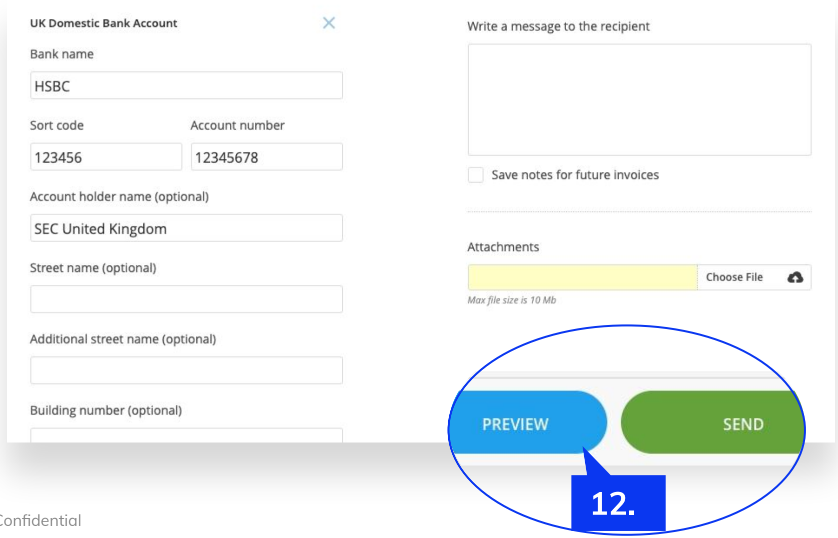
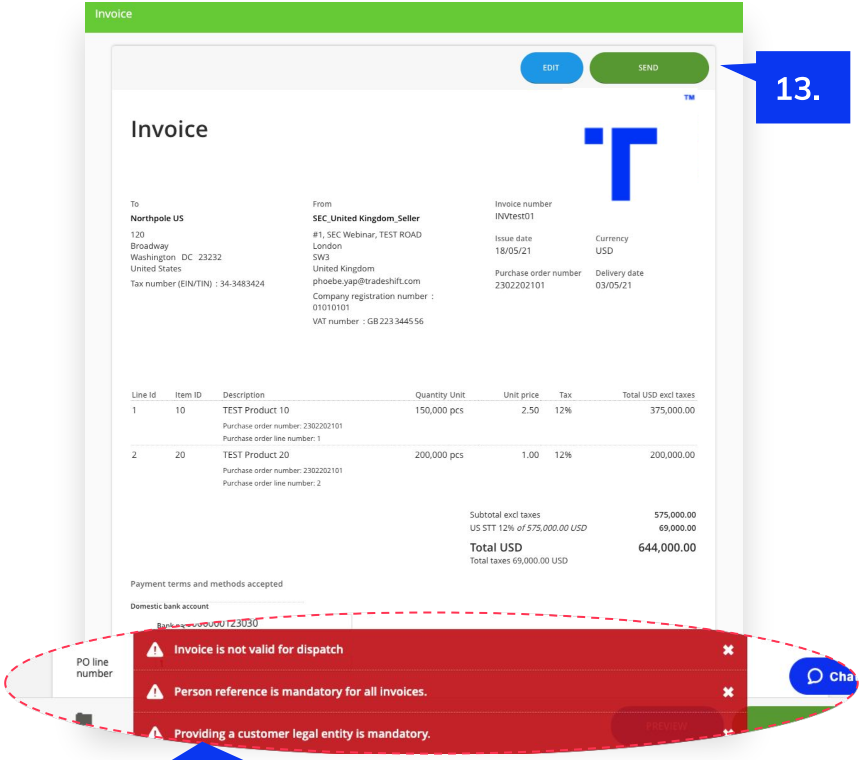
How to invoice from the CREATE Launcher

12. Click **PREVIEW** to verify the details

13. Click **SEND**

⚠️ You CANNOT amend or discard the copy after you have sent the Invoice.





⚠️ You will see error messages (in red) at the bottom of the page if your document is incomplete. In this case, follow the instruction and insert the details to fix the error(s).

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Important Notes

Customer Specifics

- Each Customer has different **Validation Rules** (mandatory fields). You can find the Validation Rules on your Customer's Landing Page.
- To access your Customer's Landing Page, please log on to the [Support] app from the left panel on the platform.
- If you are receiving POs from your Customer, you MUST create an Invoice from the PO. It is the quickest and efficient way to raise an invoice (with a PO) as it reduces errors as well.
- If you are unsure of the details mandated by your Customer, such as Legal Entity, Person Reference, Contract Number, please refer to the existing contract or reach out to your Customer directly.

Common Error and Solutions

Error message	Cause	Solution
Purchase Order __________ does not match any order on issue date YYYY-MM-DD	Relevant PO is not present on Tradeshift	1. Check with the Customer to enquire about the missing PO. 2. If the Customer confirmed the PO is uploaded, you can reach out to our Support team.
Supplier Party tax identifier is mandatory.	Supplier VAT is missing on company profile	Kindly update the Tax ID/ VAT details under the "*Company Identifiers*" section in your Company Profile.
Issue Date is mandatory and can't be in the future	Issue date is missing or outside the allowed period	The Invoice Date cannot be beyond today's date.
It appears that you are not yet set up to send documents to this particular client organisation [...]	Incomplete connection properties	Please contact our Support team by raising a Support ticket.
InvalidInput.Line 1: Invoice line quantity can't exceed the remaining balance on the Order line	Amount/ Quantity does not match that of on the PO.	1. Check if the Amount/ Quantity is within the PO amount. 2. If everything is in the correct order, there must be an issue with the invoice's particular line, and our Support team needs to check on it.

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Common Error and Solutions

Error message	Cause	Solution
The invoice number allows maximum 50 alphanumeric characters except spaces and special characters	Document ID is either longer than the allowed maximum or is empty OR Document ID contains special characters, like !@#$%^&*()) or a space which is not acceptable	The Invoice Number must be in the format of ***Alphabetical/Number*** and ***no special characters are*** included.
Company identifier has already been used	There is more than 1 account using the same company VAT. This will lead to invoice error.	Please raise a Support ticket as our Support team needs to check on it.
Unable to change company name	The company name has been used.	You can add any special character to make the Company Name unique.
Unable to invite user	The user probably locked on our side.	Please raise a Support ticket as our Support team needs to check on it.
Error - Activating Profile 'A company of that country/region already exists'	The company name initiated for that activation link already exist in the platform.	Please raise a Support ticket as our Support team needs to check on it.

03

Document Manager

How to Read Document Status

You can track the real-time Document Status by referring to the [Document Manager] app.

SENT
Document is submitted to Customer successfully.

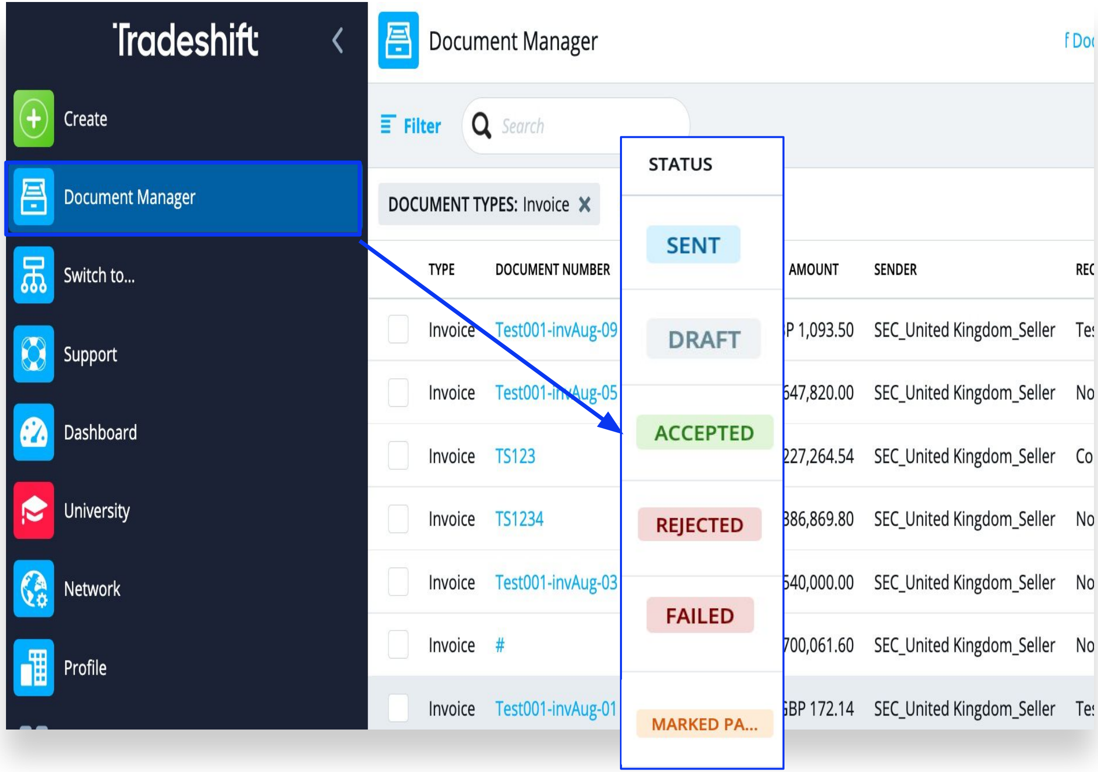
DRAFT
Invoice is created (saved as Draft), but has not been sent. A draft Invoice can be edited or discarded if required.

ACCEPTED
Customer has accepted the document and in the mid of processing it.

REJECTED
Customer has rejected the document. Please contact your Customer directly to enquire about the rejection.

FAILED
Invoice is failed to send through. Please click into the document to check the error messages and resend it.

MARKED PAID
Invoice has been paid by Customer.



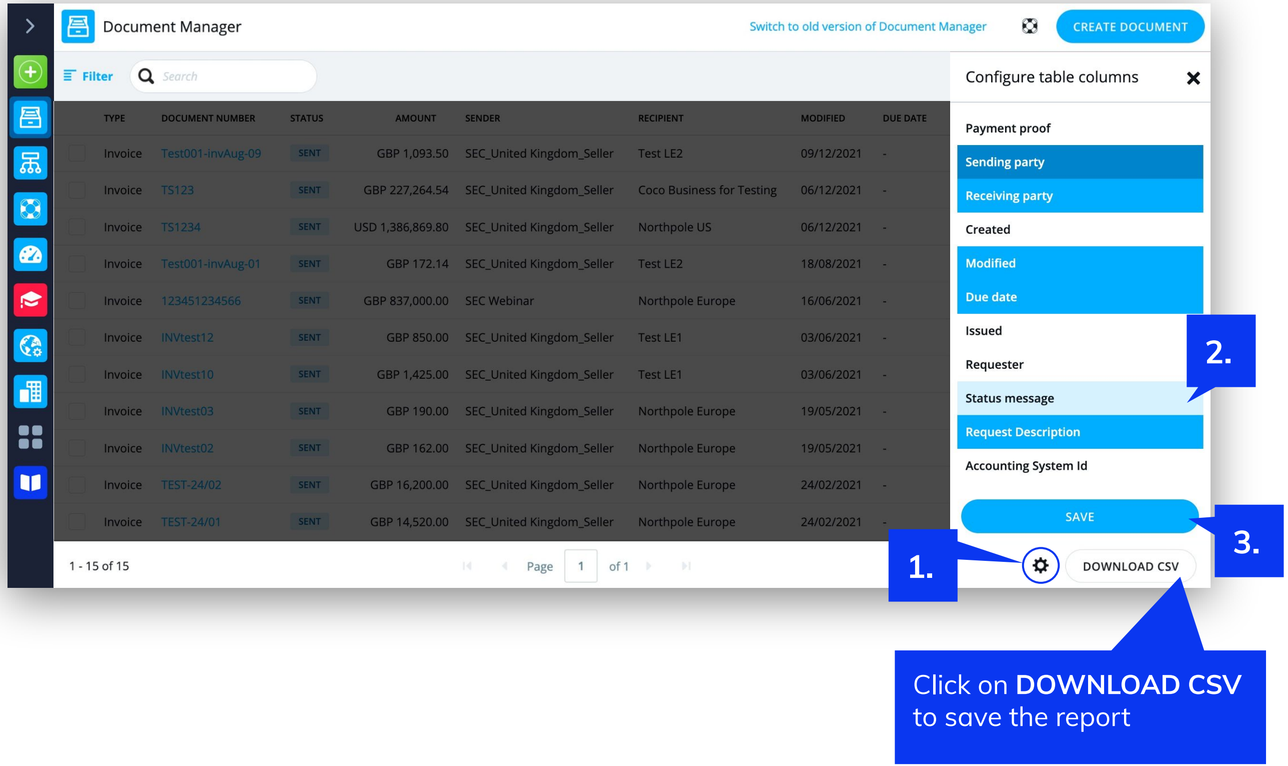
Customizing the table

How can I check the status of my invoice or payment?

You can also see more details about your document status in the Status Message column.

This is not enabled by default in the Document Manager app, so here is how you can make it visible.

1. Click on ⚙ icon
2. Choose Status Message
3. Click on SAVE



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04

How to Reach Support

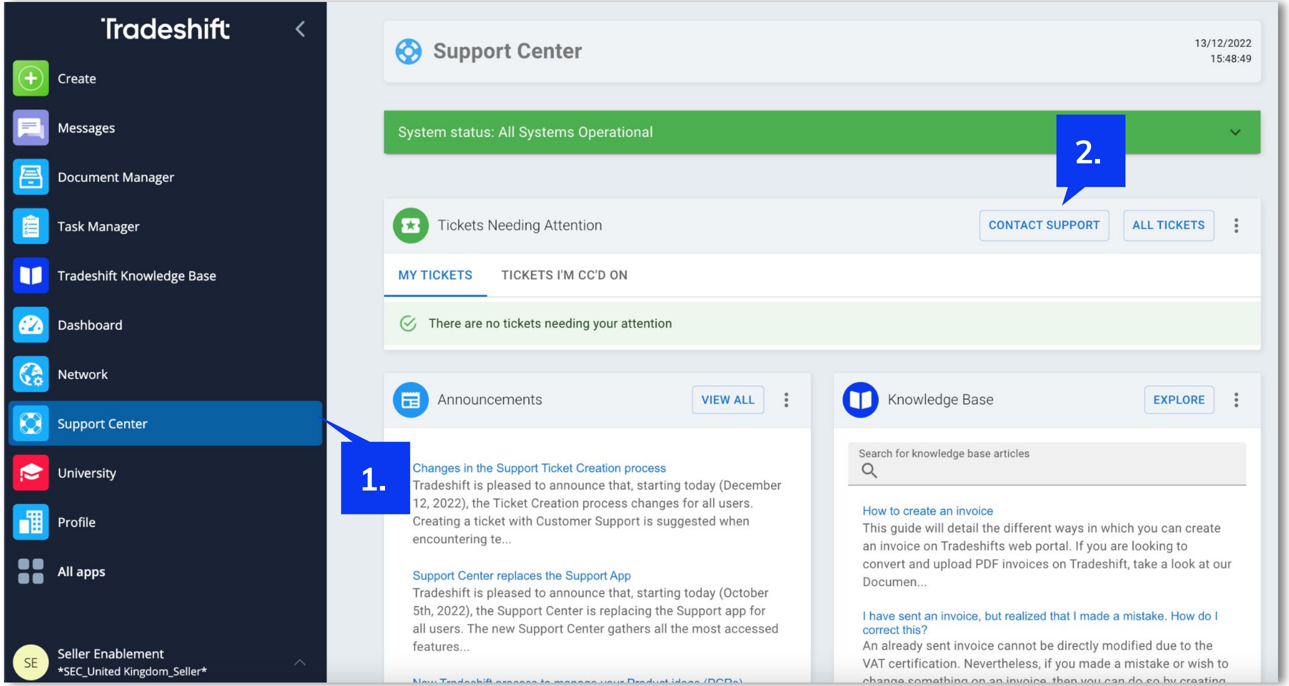
Support Center

Support Center provides information such as your pending support ticket(s), latest announcements, quick access to the Knowledge Base articles and your customer's Landing Page.

You can contact Tradeshift support team by creating a ticket with the following steps:

1. Access the [**Support Center**] application. Click on [All apps] to search for this application if you could not find it on the left toolbar

2. Click [**CONTACT SUPPORT**] to create a support ticket. Our support team will reach you via email



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Your Customer's Landing Page

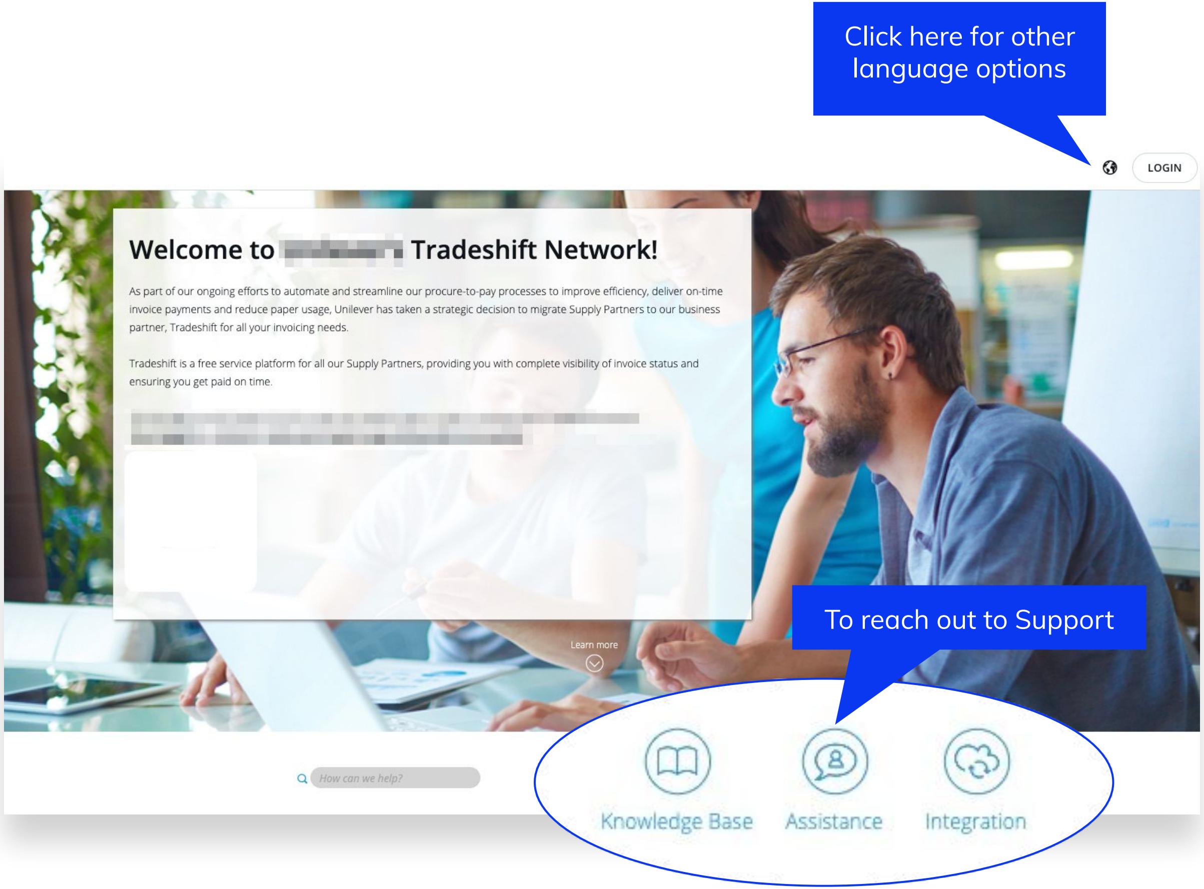
Landing page is where you will find all necessary information regarding your Customer's transition to Tradeshift.

You will be able to read through the options we have and decide on the most suitable invoicing method on Tradeshift which meets your billing scenario.

It also contains the [Invoicing Validation Rules]() set by your Customer.

Your Customer's Landing Page will be shared to you via the invitation email.

Nevertheless, you may refer here for general information: [support.tradeshift.com]()



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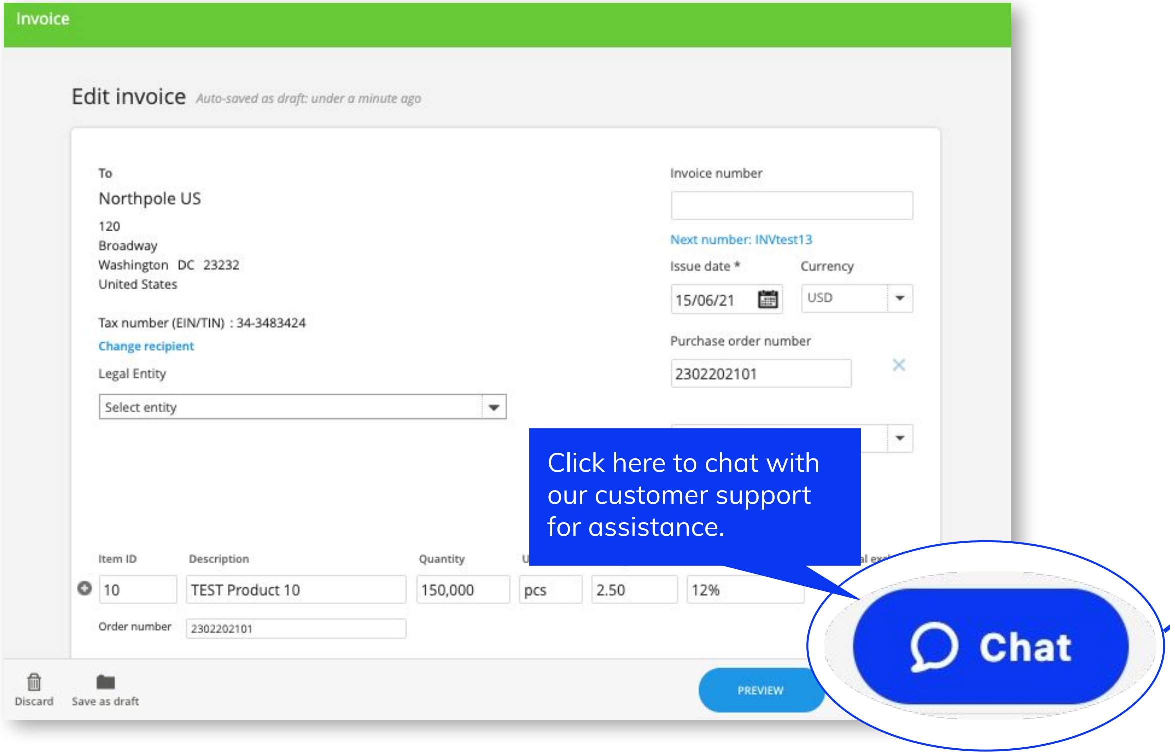
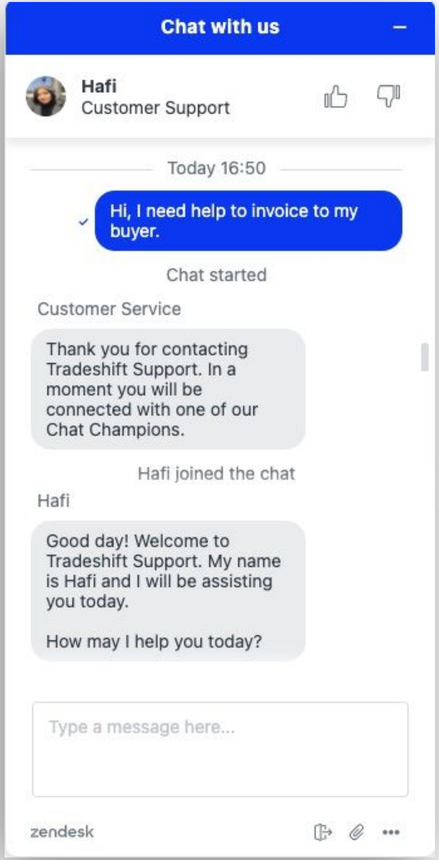
Chat Function

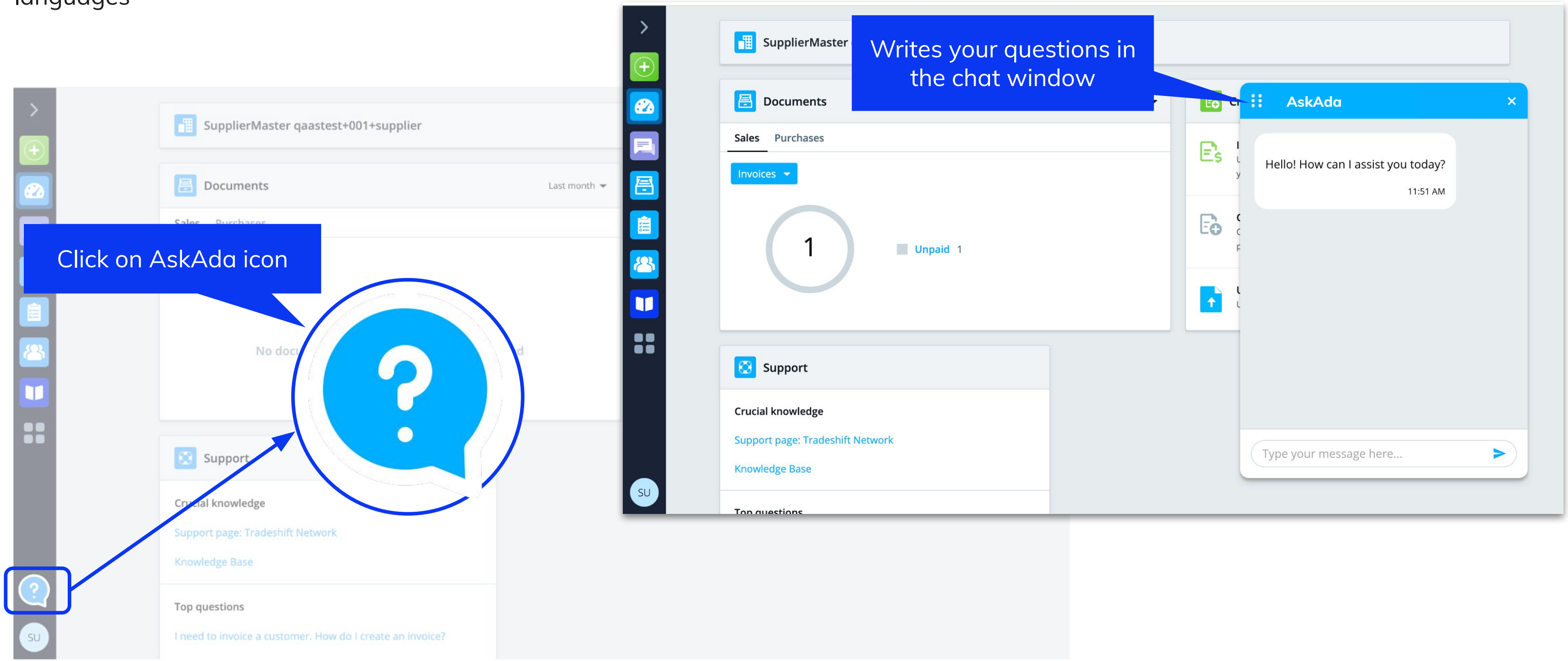
Live Chat support is available on working days (Monday ~ Friday)





AskAda

AI Assistant is available anytime — get answers in seconds, in multiple languages



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05

Frequently Asked Questions

FAQs

1. **If I require support after the Webinar, how can I reach Tradeshift for further assistance?**

   You can reach our Support team by raising a Support ticket via https://support.tradeshift.com/requests/new.

   Alternatively, We offer assistance via Chat on the platform. Go to the “Create Invoice” app to find live chat support.

   Or, you can try **AskAda**, our brand-new AI assistant — available 24/7.

   Nevertheless, if you have payment-related or contract/PO-related enquiries, please contact your Customer directly.

2. **How do I obtain the invitation email with Activation Link from Tradeshift?**

   You will receive the invitation with activation link from Tradeshift via email. If you could not find it in the mailbox, please check the junk/spam folder. If you have yet to receive the invitation email, please contact our Support team by raising a Support ticket via https://support.tradeshift.com/requests/new.

FAQs

3. **Do PDF/ paper copies need to be submitted to the Customer after sending an e-invoice through Tradeshift?**

   No. PDF/ paper copies are not needed. Nevertheless, you may attach the system generated PDF invoice during the submission of e-invoice for reference.

4. **My Customer is submitting their POs via Tradeshift. I could not find the relevant PO in the Document Manager. What should I do?**

   Please contact your Customer directly to enquire about the missing PO. If your customer has confirmed the PO is uploaded onto Tradeshift, you can reach our Support team by raising a Support ticket via https://support.tradeshift.com/requests/new.

FAQs

5. **My invoice volume is significant. Is there other option to automate the invoicing process?**

   We have a solution for that! If you have an invoice volume greater than 300 invoices/ year, we offer the option of an EDI integration. Should you be interested for EDI integration, let us know by reaching out to seller-enablement@tradeshift.com. We will share more information about it and advise further. You may also refer to https://tradeshift.com/integrate/ to find out more.

Thank you!

Tradeshift PAY | WebUI