

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.

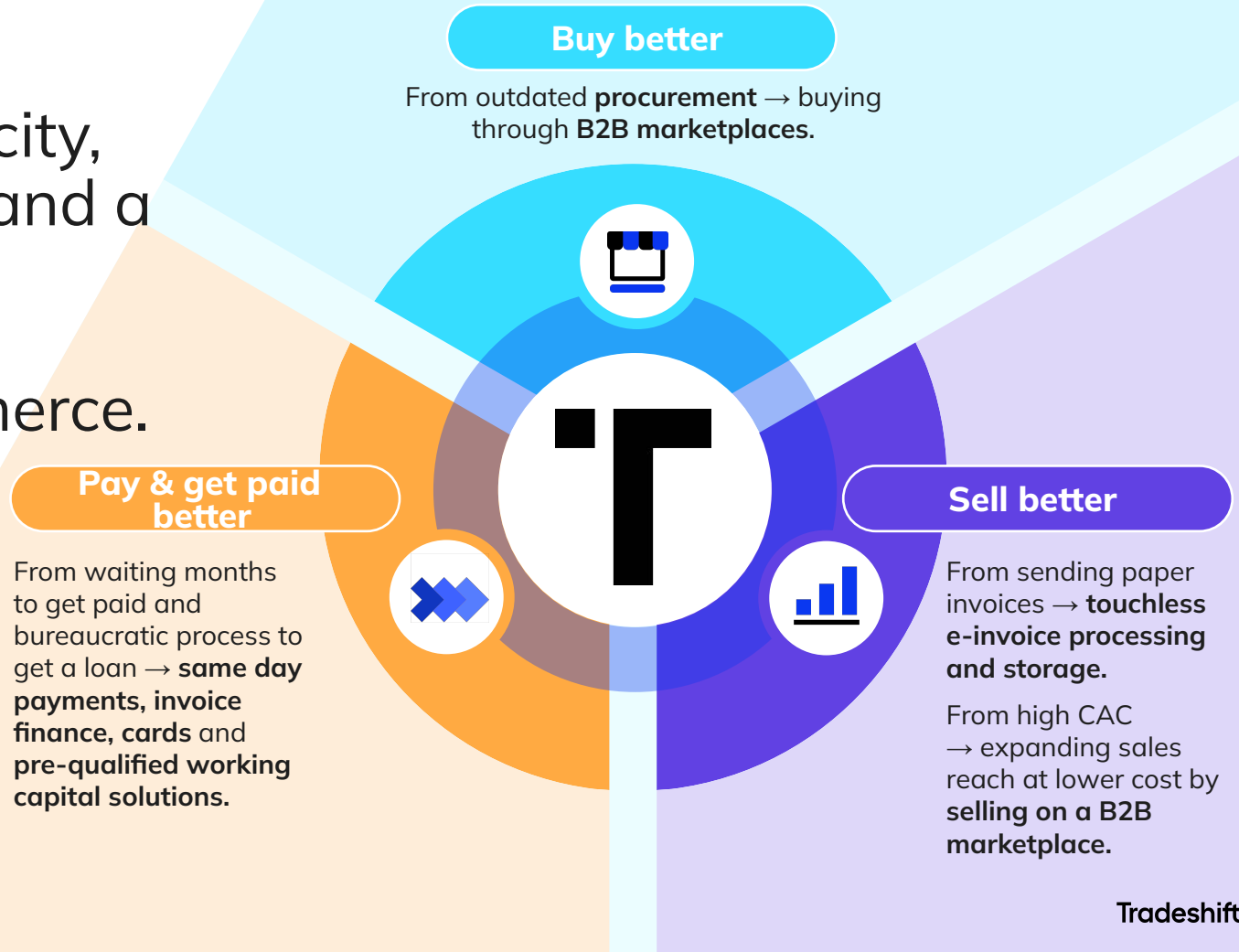


Our Vision

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



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



Tradeshift improving B2B Commerce since 2010



Agenda

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 - b. Update Company Profile
 - c. Network Connection with Your Customer
2. WebUI Solution
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 - c. Common Error and Solutions
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 - b. Customizing the table
4. How to Reach Support
 - a. Support Centre
 - b. Your Customer's Landing Page
 - c. Chat Function
 - d. AskAda
5. FAQs

Tips: Click on the title to view the relevant topic

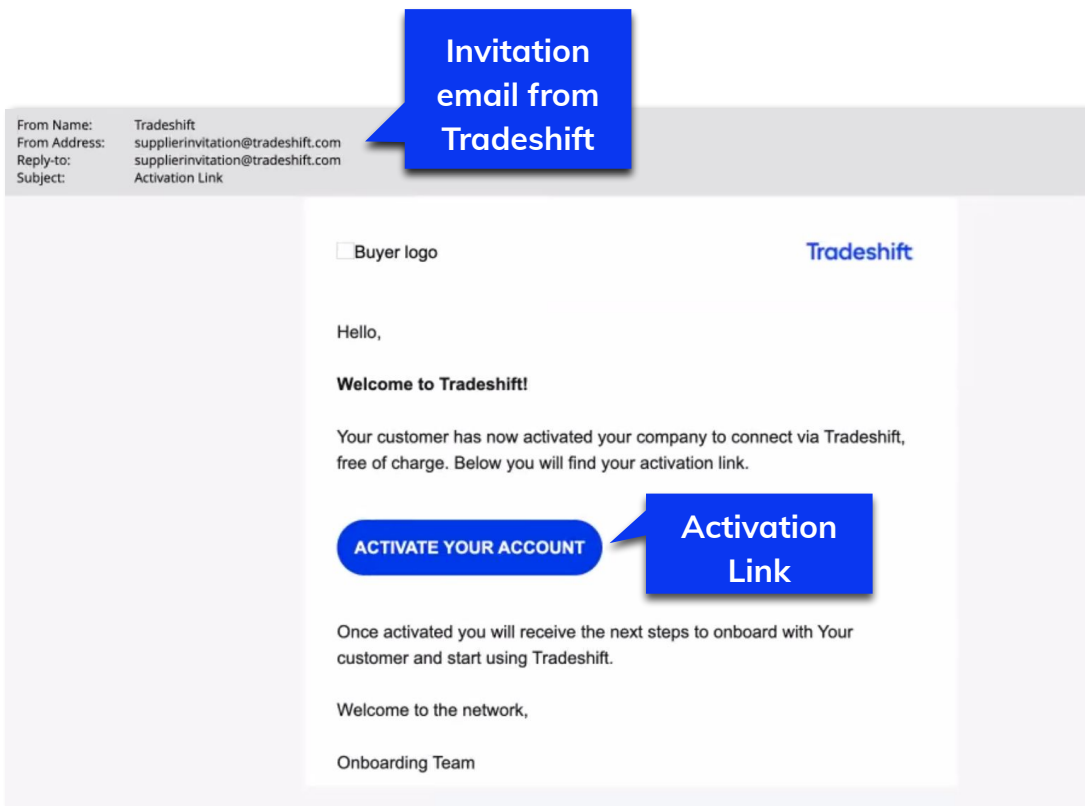
01

Setting Up Your Account and Company Profile

Account Activation

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

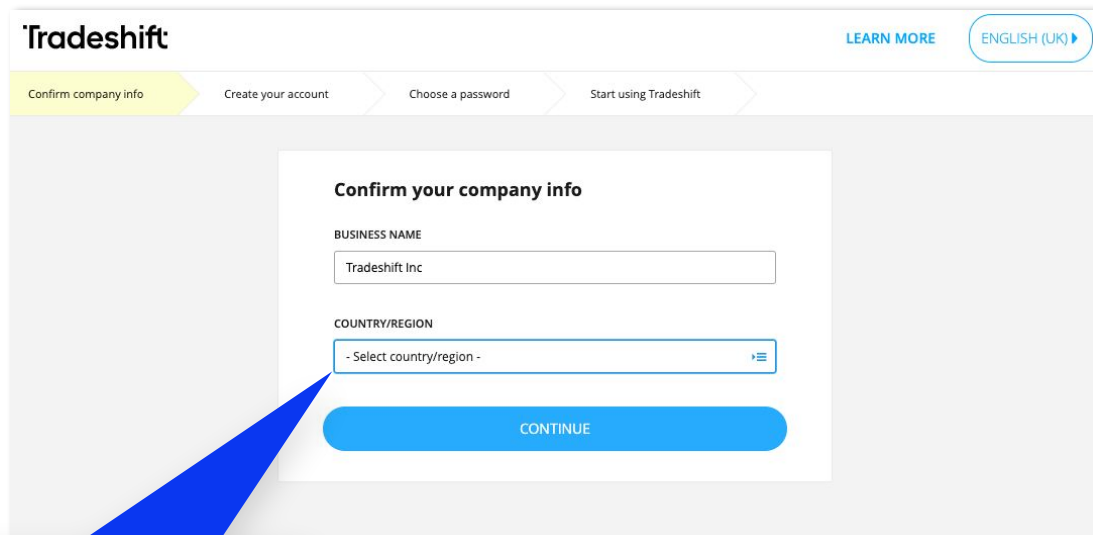
- If you could not find the email, search in the junk/spam mailbox.
- If you did not receive the email, you can raise a Support Ticket via: <https://support.tradeshift.com/requests/new>. Please provide your Company Name and Vendor No. in the Ticket.



Account Activation

Complete your company information during the registration of account:

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



The screenshot shows the Tradeshift account activation process. At the top, the Tradeshift logo is on the left, and 'LEARN MORE' and 'ENGLISH (UK)' are on the right. Below the logo is a progress bar with four steps: 'Confirm company info' (highlighted in yellow), 'Create your account', 'Choose a password', and 'Start using Tradeshift'. The main form area is titled 'Confirm your company info'. It contains two input fields: 'BUSINESS NAME' with the text 'Tradeshift Inc' and 'COUNTRY/REGION' with a dropdown menu showing '- Select country/region -'. A blue 'CONTINUE' button is at the bottom of the form. A blue callout bubble points to the 'COUNTRY/REGION' dropdown menu.

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.

The screenshot shows the 'Create your account' page on the Tradeshift website. The page has a header with the Tradeshift logo, a 'LEARN MORE' link, and a language selector for 'ENGLISH (UK)'. Below the header is a progress bar with four steps: 'Confirm company info', 'Create your account' (which is highlighted), 'Choose a password', and 'Start using Tradeshift'. The main content area is titled 'Create your account' and contains the following fields and options:

- FIRST NAME**: An empty text input field.
- LAST NAME**: An empty text input field.
- EMAIL ADDRESS**: A text input field containing 'test01@tradeshift.com'.
- LANGUAGE**: A dropdown menu showing 'English (UK)' with a right-pointing arrow.
- ☐ By signing up, you are indicating that you have read and agree to [Tradeshift's Terms of Service](#) and [Privacy Policy](#).
- ☐ Yes, I want to receive marketing communications from Tradeshift.
- A large blue 'CONTINUE' button at the bottom.

Two blue callout boxes are overlaid on the form:

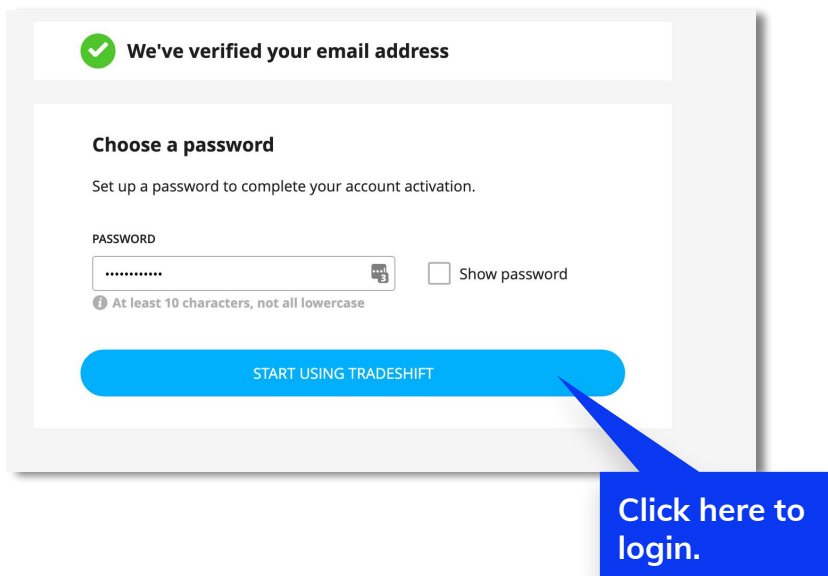
- A callout pointing to the email address field with the text: 'Enter the email address which will be the login email of your account.'
- A callout pointing to the 'CONTINUE' button with the text: 'Click continue to proceed'.

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

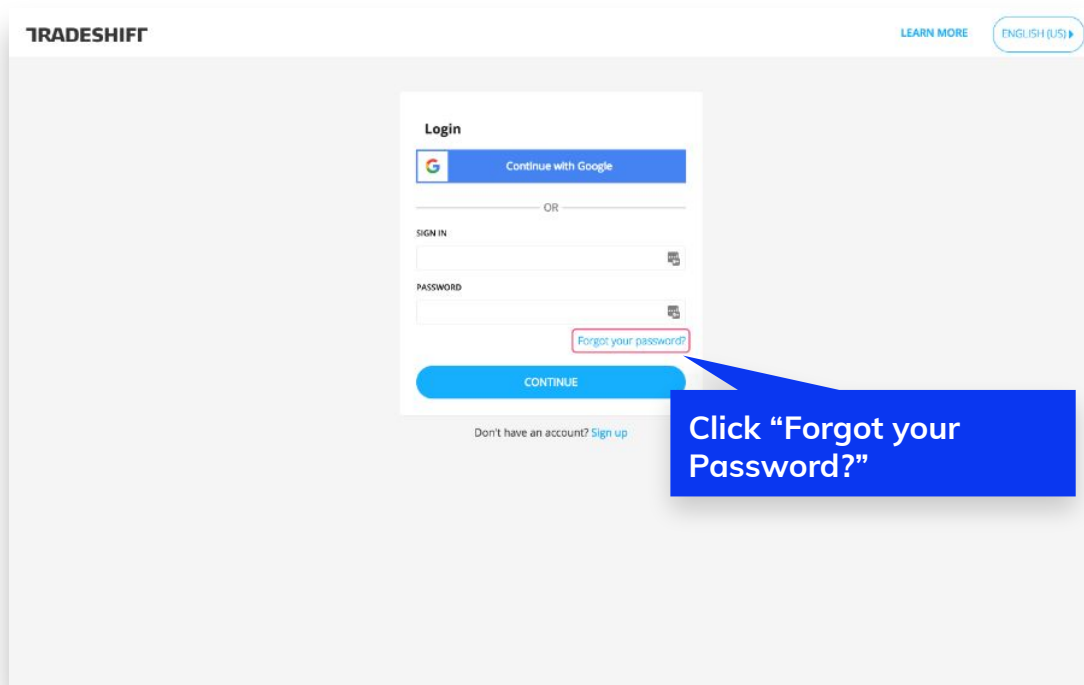


The screenshot shows a web interface for account activation. At the top, a green checkmark icon is followed by the text "We've verified your email address". Below this, the heading "Choose a password" is displayed, followed by the instruction "Set up a password to complete your account activation." A password input field is shown with the label "PASSWORD" and a masked password "*****". To the right of the input field is a checkbox labeled "Show password". Below the input field, a small information icon is followed by the text "At least 10 characters, not all lowercase". A large blue button with the text "START USING TRADESHIFT" is positioned below the password field. A blue callout box with a white arrow pointing to the button contains the text "Click here to login."

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

The screenshot shows the Tradeshift 'Company Profile' page. On the left is a dark sidebar with navigation options: Create, Document Manager, Switch to..., Support, Dashboard, University, Network, Profile (highlighted), All apps, and Tradeshift Knowledge Base. The main content area is titled 'Company Profile' and includes a 'VIEW AS A VISITOR' button and a 'PROFILE SETTINGS' button. Below the title is a profile card for '*SEC United Kingdom Seller*' with a logo and 'Your Website' link. The 'ABOUT' section shows '2 Connections' and 'Industry'. The 'Complete your profile' form has a 'Profile strength 35%' indicator. The form fields are: COMPANY NAME (*SEC United Kingdom Seller*), WEBSITE, INDUSTRY, COMPANY OWNERSHIP, COMPANY ADDRESS (London, GB), PHONE, INVITE TEAM MEMBER, COMPANY DESCRIPTION, COMPANY SIZE, SHARE CAPITAL, REGISTRATION ADDRESS, and COMPANY EMAIL ADDRESS. Red boxes highlight the 'COMPANY NAME' and 'COMPANY ADDRESS' fields, with a red callout pointing to them saying 'Mandatory fields'. A blue callout points to the 'Profile' sidebar item saying 'Click the [Profile] app'. Another blue callout points to the 'INVITE TEAM MEMBER' button saying 'Tip: Click here to invite additional users'.

Tradeshift

Company Profile

VIEW AS A VISITOR PROFILE SETTINGS

Complete your profile

Profile strength 35%

COMPANY NAME
SEC United Kingdom Seller

WEBSITE

INDUSTRY

COMPANY OWNERSHIP

COMPANY ADDRESS
London, GB

PHONE

INVITE TEAM MEMBER

COMPANY DESCRIPTION

COMPANY SIZE

SHARE CAPITAL

REGISTRATION ADDRESS

COMPANY EMAIL ADDRESS

DONE

Click the [Profile] app

Tip: Click here to invite additional users

Mandatory fields

Update Company Profile

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

Company Identifiers

EDIT

Company ID type	Company ID/Number
Tax ID type	VAT ID/Number

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.

Network Connection with Your Customer

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

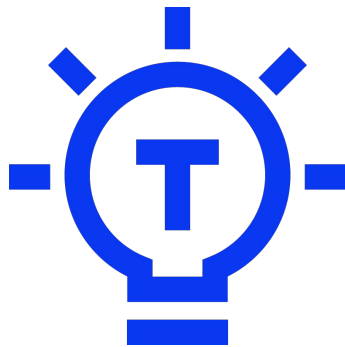
1. Go to 'Network'
2. Under 'My Network' tab, make sure the Relationship Status with your Customer is reflected as 'Connection'.
 - For existing Tradeshift users: if the Relationship Status is reflected as 'Unverified relationship', click **VERIFY** to accept the connection request.
 - If you could not see any connection, please contact our Support team via Chat or <https://support.tradeshift.com/requests/new>

The screenshot shows the Tradeshift 'Network' page. The left sidebar contains a menu with 'Network' highlighted. The main content area has a yellow warning banner about unverified relationships. Below this is a table of connections. The first row shows 'Chocolate Bar Test Buyer GmbH' with a 'Connection' status. The second row shows 'Test Buyer A Limited' with an 'Unverified relationship' status and a 'VERIFY' button. The third row shows 'Test Buyer B Limited' with a 'Connection' status. A red callout points to the 'VERIFY' button.

NAME	ACCOUNTING SYSTEM ID	RELATIONSHIP ...
Chocolate Bar Test Buyer GmbH Germany		Connection
Test Buyer A Limited United Kingdom		Unverified relationship VERIFY REMOVE
Test Buyer B Limited Austria		Connection

Click 'VERIFY' to accept the connection request

Tradeshift Platform Walkthrough

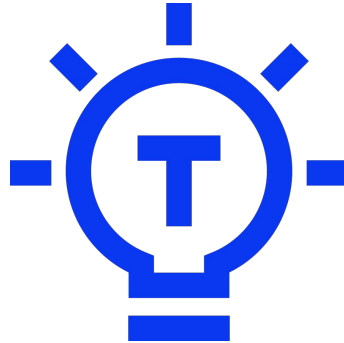


02

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**.

The screenshot shows the Tradeshift Document Manager interface. On the left is a dark sidebar with navigation options: Create, Document Manager (highlighted), Switch to..., Network, Profile, All apps, and Tradeshift Knowledge Base. The main area displays a 'Filter' section with a search bar and a 'DOCUMENT TYPES: Order' filter. A blue callout points to the 'Document Manager' sidebar item with the text '1. Click the Document Manager app'. Another blue callout points to the 'DOCUMENT TYPES: Order' filter with the text '2. Search for the Purchase Order you wish to invoice against'. A red callout points to the 'Clear all' button with the text 'Tip: Click on CLEAR ALL the filter before searching for any document'. A third blue callout points to the 'Document ID' column in the table with the text '3. Select the Purchase Order by clicking the Document ID'. The table lists documents with columns: TYPE, DOCUMENT NUMBER, STATUS, AMOUNT, SENDER, RECIPIENT, and ACTIONS. The first two rows are 'Order' type with 'RECEIVED' status. The next two rows are 'Order' type with 'ACCEPTED' status.

2. Search for the Purchase Order you wish to invoice against

Tip: Click on **CLEAR ALL** the filter before searching for any document

1. Click the Document Manager app

3. Select the Purchase Order by clicking the Document ID

TYPE	DOCUMENT NUMBER	STATUS	AMOUNT	SENDER	RECIPIENT	ACTIONS
☐ Order	2302202102	RECEIVED	USD 1,540,000.00	Northpole US	SEC_United I	***
☐ Order	2302202101	RECEIVED	USD 644,000.00	Northpole US	SEC_United I	***
☒ Order	PO2302202102	ACCEPTED	GBP 648,000.00	Northpole Europe	SEC_United I	***
☐ Order	PO2302202101	ACCEPTED	GBP 697,500.00	Northpole Europe	SEC_United I	***

PO Flip Method

Always ensure all details are accurate before flipping any documents.

Click **ACCEPT** as confirmation of the PO.

Purchase Order received from Northpole US
Received via Tradeshift — Last update: 3 months ago

OTHER ACTIONS [CREATE INVOICE](#) [ACCEPT](#)

Purchase Order

To:
SEC_United Kingdom_Seller
#1, SEC Webinar, TEST ROAD
London
SW3
United Kingdom
Company registration number :
01010101
VAT number : GB 223 3445 56

From:
Northpole US
120
Broadway
Washington, DC 23232
United States
Tax number (EIN/TIN) : 34-34834

**Click
CREATE INVOICE
to start creating an
Invoice by PO Flip**

Line Id	Item ID	Description	Quantity	Unit	Unit price	Tax	Total USD excl taxes
1	10	TEST Product 10	150,000	pcs	2.50	12%	375,000.00
2	20	TEST Product 20	200,000	pcs	1.00	12%	200,000.00
Subtotal excl taxes							575,000.00
US STT 12% of 575,000.00 USD							69,000.00
Total USD							644,000.00
Total taxes 69,000.00 USD							

Contact document sender Contact colleague

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

Tip: Customer details are automatically populated (according to the PO)

Header level details



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).

Line level details

Quantity can be reduced for partial invoicing.

3.

4.

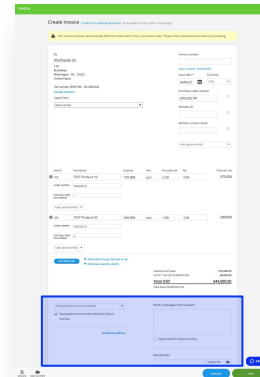
The screenshot displays the 'Create Invoice' interface in Tradeshift. It features a sidebar with various icons and a main content area. The main area is divided into a header section and a table of line items. The table has columns for Item ID, Description, Quantity, Unit, Price per unit, Tax, and Total excl. tax. Two line items are visible: 'TEST Product 10' with a quantity of 150,000 and 'TEST Product 20' with a quantity of 200,000. Both items have a unit of 'pcs' and a price per unit of 2.50 and 1.00 respectively. The tax rate for both is 12%. Below the table, there are fields for 'Purchase order line number' and 'Add optional field'. At the bottom, there is a summary table with 'Subtotal excl taxes' of 575,000.00 and 'US STT 12% of 575,000.00 USD' of 69,000.00. The total is 644,000.00. There are buttons for 'ADD NEW LINE', 'Add header charge, discount or tax', 'Show base quantity column', 'DISCARD', 'Save as draft', 'PREVIEW', and 'SEND'. A 'Chat' button is also present. A blue arrow points from the 'Line level details' text to the table. A blue callout box points to the 'Quantity' field of the first line item. Another blue callout box points to the 'Tax' field of the first line item. A third blue callout box points to the 'Add header charge, discount or tax' button. A fourth blue callout box points to the 'Show base quantity column' button.

Item ID	Description	Quantity	Unit	Price per unit	Tax	Total excl. tax
10	TEST Product 10	150,000	pcs	2.50	12%	375,000
Order number 2302202101						
Purchase order line number 1						
Add optional field						
20	TEST Product 20	200,000	pcs	1.00	12%	200,000
Order number 2302202101						
Purchase order line number 2						
Add optional field						

Summary	
Subtotal excl taxes	575,000.00
US STT 12% of 575,000.00 USD	69,000.00
Total	644,000.00

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



Add payment terms and means

5.

☒ Save payment terms and means for future invoices

Tip: Tick here to save the details for future invoices

Set delivery address

6.

Write a message to the recipient

7.

Attachments

Choose File

8.

Max file size is 10 Mb

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.

UK Domestic Bank Account ✕

Bank name
HSBC

Sort code
123456

Account number
12345678

Account holder name (optional)
SEC United Kingdom

Street name (optional)

Additional street name (optional)

Building number (optional)

Write a message to the recipient

☐ Save notes for future invoices

Attachments

Choose File

Max file size is 10 MB



Invoice

EDIT SEND

10.

Invoice

To
Northpole US
120 Broadway
Washington, DC 23232
United States
Tax number (EIN/TIN) : 34-3483424

From
SEC_United Kingdom_Seller
#1, SEC Webinar, TEST ROAD
London SW3
United Kingdom
phoebe.yap@tradeshift.com
Company registration number : 01010101
VAT number : GB 223 3445 56

Invoice number
INVtest01

Issue date
18/05/21

Currency
USD

Purchase order number
2302202101

Delivery date
03/05/21

Line Id	Item ID	Description	Quantity	Unit	Unit price	Tax	Total USD excl taxes
1	10	TEST Product 10 Purchase order number: 2302202101 Purchase order line number: 1	150,000	pcs	2.50	12%	375,000.00
2	20	TEST Product 20 Purchase order number: 2302202101 Purchase order line number: 2	200,000	pcs	1.00	12%	200,000.00

Subtotal excl taxes 575,000.00
US STT 12% of 575,000.00 USD 69,000.00
Total USD 644,000.00
Total taxes 69,000.00 USD

Payment terms and methods accepted

Domestic bank account

PO line number

Invoice is not valid for dispatch

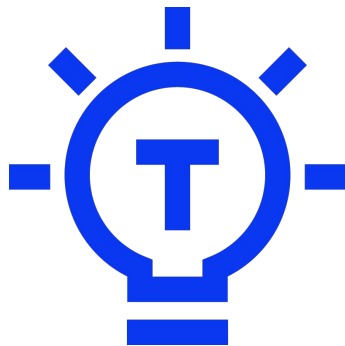
Person reference is mandatory for all invoices.

Providing a customer legal entity is mandatory.

⚠ 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).

CREATE Launcher

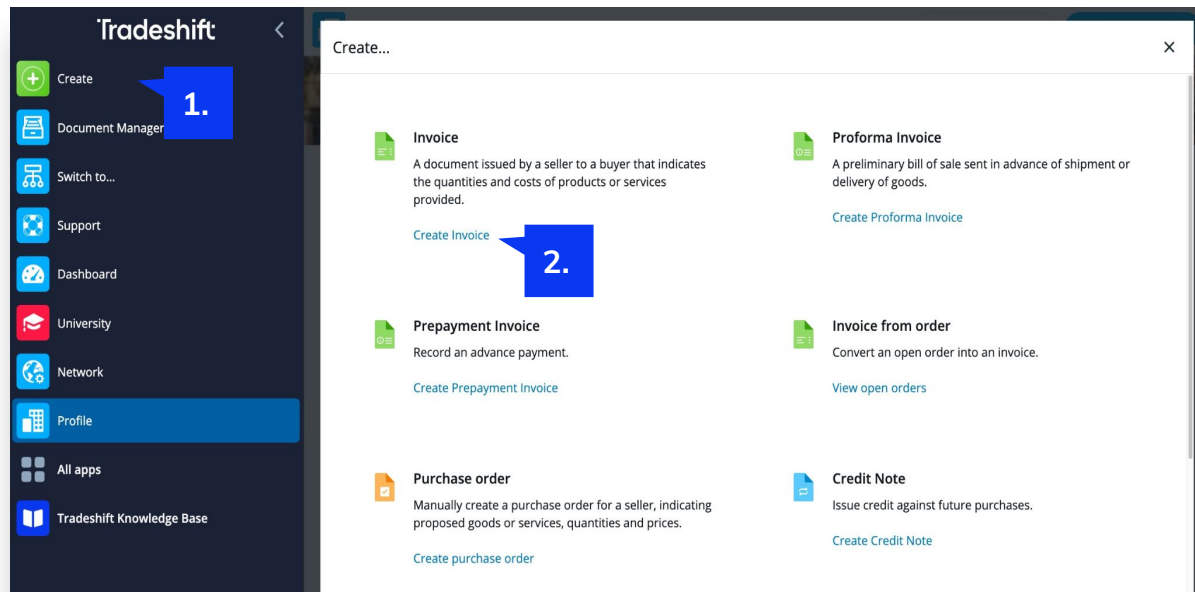
Applicable to Non-PO sellers (sellers who invoice without a PO)



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

Invoice

Create invoice [Create from existing document](#)

To

northpole US

Northpole US
US 120, Broadway, Washington DC 23232

Northpole Customer
US

No match? [Add new contact](#)

Invoice number

Next number: INVtest003

Issue date * 18/05/21 Currency GBP

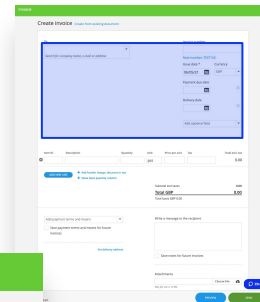
Payment due date

Delivery date

Add optional field

Discard Save as draft PREVIEW SEND

Chat



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)

Line level details

The screenshot shows the 'Create Invoice' interface. A blue box labeled '5.' highlights the first line item table. Below it, a dashed blue box labeled '7.' highlights the 'Add optional field' section, which includes a 'Charge' dropdown, a text input for 'Overtime claim', a 'Quantity' input set to '50', a 'Unit' dropdown set to 'GBP', and a 'Tax' input set to '20%'. A blue button labeled '6.' is labeled 'ADD NEW LINE'. To the right, a summary table shows the totals.

Item ID	Description	Quantity	Unit	Price per unit	Tax	Total excl. tax
01	Item 01	5	pcs	10	20%	50

PO line number

Add optional field

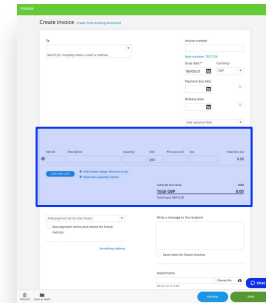
Charge	Description	Quantity	Unit	Tax	Total excl. tax
Overtime claim		50	GBP	20%	50

Choose reason code

6. ADD NEW LINE

7. + Add header charge, discount or tax
+ Show base quantity column

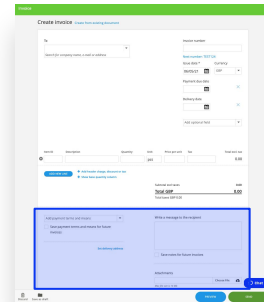
Subtotal excl taxes	50.00
Charge	50.00
GB VAT 20% of 100.00 GBP	20.00
Total GBP	120.00
Total taxes GBP 20.00	



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



8.

Add payment terms and means

☒ Save payment terms and means for future invoices

Tip: Tick here to save the details for future invoices

Set delivery address

9.

Write a message to the recipient

10.

☐ Save notes for future invoices

Attachments

Choose File

11.

Max file size is 10 Mb

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.

UK Domestic Bank Account ✕

Bank name
HSBC

Sort code
123456

Account number
12345678

Account holder name (optional)
SEC United Kingdom

Street name (optional)

Additional street name (optional)

Building number (optional)

Write a message to the recipient

☐ Save notes for future invoices

Attachments
Choose File

Max file size is 10 MB

PREVIEW

SEND

12.

Invoice

EDIT SEND

13.

Invoice

To
Northpole US
120 Broadway
Washington DC 23232
United States
Tax number (EIN/TIN) : 34-3483424

From
SEC_United Kingdom_Seller
#1, SEC Webinar, TEST ROAD
London SW3
United Kingdom
phoebe.yap@tradeshift.com
Company registration number : 01010101
VAT number : GB 223 3445 56

Invoice number
INVtest01

Issue date
18/05/21

Currency
USD

Purchase order number
2302202101

Delivery date
03/05/21

Line Id	Item ID	Description	Quantity	Unit	Unit price	Tax	Total USD excl taxes
1	10	TEST Product 10 Purchase order number: 2302202101 Purchase order line number: 1	150,000	pcs	2.50	12%	375,000.00
2	20	TEST Product 20 Purchase order number: 2302202101 Purchase order line number: 2	200,000	pcs	1.00	12%	200,000.00

Subtotal excl taxes 575,000.00
US STT 12% of 575,000.00 USD 69,000.00
Total USD 644,000.00
Total taxes 69,000.00 USD

Payment terms and methods accepted

Domestic bank account
Bank account number 123456789010

PO line number

Invoice is not valid for dispatch

Person reference is mandatory for all invoices.

Providing a customer legal entity is mandatory.

⚠ 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).

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.

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.

The screenshot shows the Tradeshift Document Manager interface. On the left is a dark sidebar with navigation options: Create, Document Manager (highlighted with a blue box and a blue arrow pointing to the status legend), Switch to..., Support, Dashboard, University, Network, and Profile. The main area is titled 'Document Manager' and contains a search bar, a filter for 'DOCUMENT TYPES: Invoice', and a table of invoices. A blue arrow points from the 'Document Manager' sidebar item to a legend box on the right. The legend box, titled 'STATUS', contains six color-coded buttons: SENT (light blue), DRAFT (light grey), ACCEPTED (green), REJECTED (red), FAILED (red), and MARKED PAID (orange). The table below the legend shows a list of invoices with columns for TYPE, DOCUMENT NUMBER, AMOUNT, SENDER, and REC.

TYPE	DOCUMENT NUMBER	AMOUNT	SENDER	REC
Invoice	Test001-invAug-09	P 1,093.50	SEC_United Kingdom_Seller	Test
Invoice	Test001-invAug-05	547,820.00	SEC_United Kingdom_Seller	No
Invoice	TS123	227,264.54	SEC_United Kingdom_Seller	Co
Invoice	TS1234	386,869.80	SEC_United Kingdom_Seller	No
Invoice	Test001-invAug-03	540,000.00	SEC_United Kingdom_Seller	No
Invoice	#	700,061.60	SEC_United Kingdom_Seller	No
Invoice	Test001-invAug-01	GBP 172.14	SEC_United Kingdom_Seller	Test

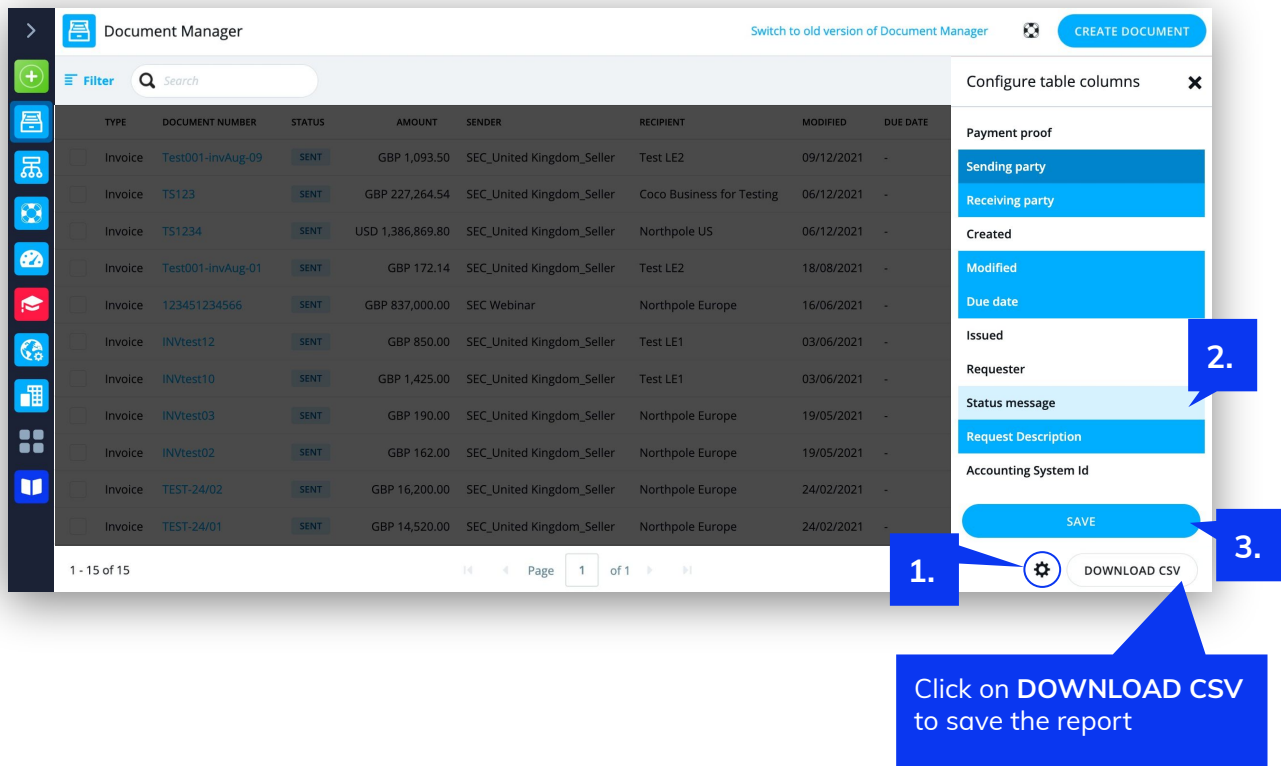
Customizing the table

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



Document Manager

Switch to old version of Document Manager

CREATE DOCUMENT

Filter Search

	TYPE	DOCUMENT NUMBER	STATUS	AMOUNT	SENDER	RECIPIENT	MODIFIED	DUE DATE
	Invoice	Test001-invAug-09	SENT	GBP 1,093.50	SEC_United Kingdom_Seller	Test LE2	09/12/2021	-
	Invoice	TS123	SENT	GBP 227,264.54	SEC_United Kingdom_Seller	Coco Business for Testing	06/12/2021	-
	Invoice	TS1234	SENT	USD 1,386,869.80	SEC_United Kingdom_Seller	Northpole US	06/12/2021	-
	Invoice	Test001-invAug-01	SENT	GBP 172.14	SEC_United Kingdom_Seller	Test LE2	18/08/2021	-
	Invoice	123451234566	SENT	GBP 837,000.00	SEC Webinar	Northpole Europe	16/06/2021	-
	Invoice	INVtest12	SENT	GBP 850.00	SEC_United Kingdom_Seller	Test LE1	03/06/2021	-
	Invoice	INVtest10	SENT	GBP 1,425.00	SEC_United Kingdom_Seller	Test LE1	03/06/2021	-
	Invoice	INVtest03	SENT	GBP 190.00	SEC_United Kingdom_Seller	Northpole Europe	19/05/2021	-
	Invoice	INVtest02	SENT	GBP 162.00	SEC_United Kingdom_Seller	Northpole Europe	19/05/2021	-
	Invoice	TEST-24/02	SENT	GBP 16,200.00	SEC_United Kingdom_Seller	Northpole Europe	24/02/2021	-
	Invoice	TEST-24/01	SENT	GBP 14,520.00	SEC_United Kingdom_Seller	Northpole Europe	24/02/2021	-

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Page 1 of 1

Configure table columns

Payment proof

Sending party

Receiving party

Created

Modified

Due date

Issued

Requester

Status message

Request Description

Accounting System Id

SAVE

DOWNLOAD CSV

Click on **DOWNLOAD CSV** to save the report

04

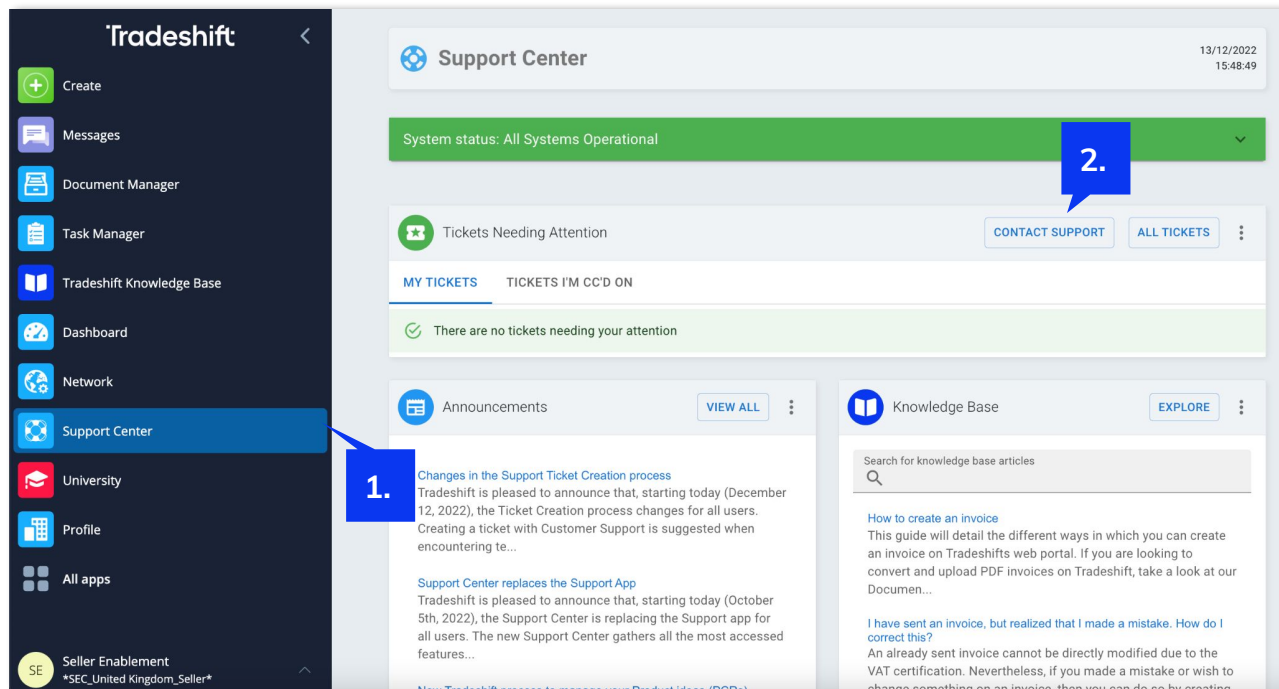
How to Reach Support

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



Your Customer's Landing Page

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

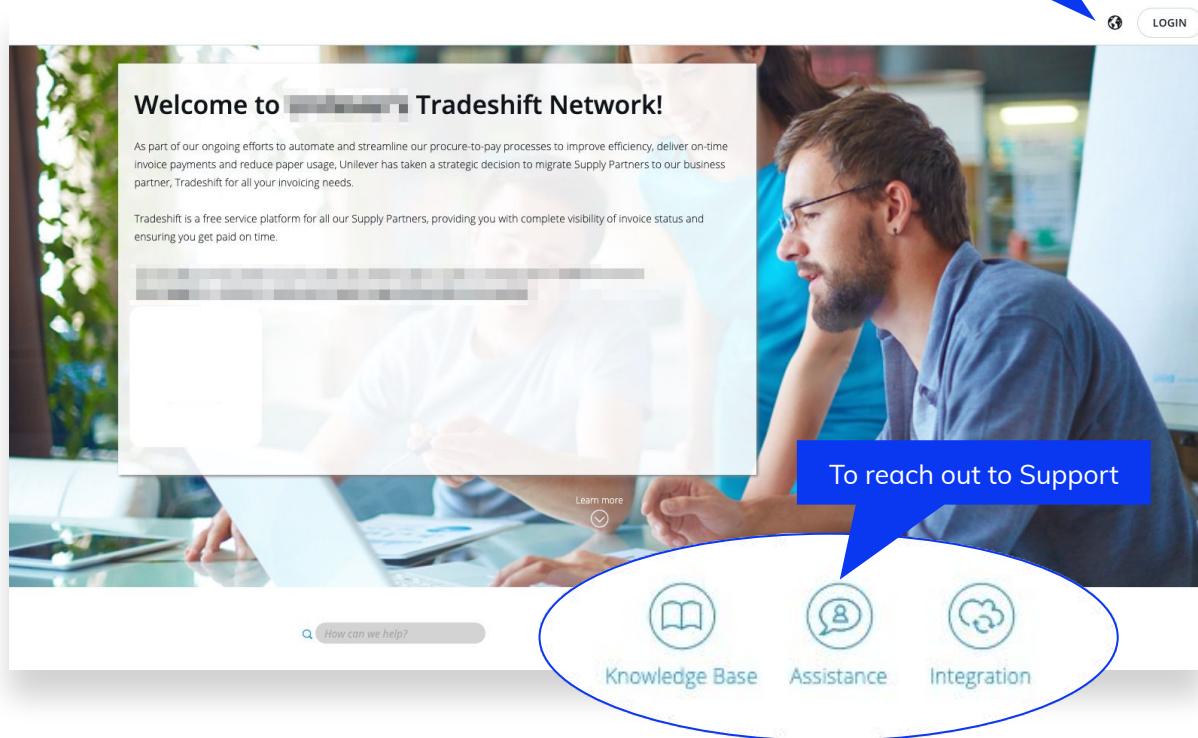
You will be able to read through the options we have and decide on the most suitable invoicing method on Tradeshift which meets your billing scenario.

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

Click here for other language options



Chat Function

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

Invoice

Edit invoice Auto-saved as draft: under a minute ago

To

Northpole US

120

Broadway

Washington DC 23232

United States

Invoice number

Next number: INVtest13

Issue date *

15/06/21

Currency

USD

Purchase order number

2302202101

Tax number (EIN/TIN) : 34-3483424

Change recipient

Legal Entity

Select entity

Item ID

Description

Quantity

Unit

Unit price

Tax rate

10

TEST Product 10

150,000

pcs

2.50

12%

Order number

2302202101

Discard

Save as draft

PREVIEW

Click here to chat with our customer support for assistance.



Chat with us

Hafi

Customer Support

👍👎

Today 16:50

✓

Hi, I need help to invoice to my buyer.

Chat started

Customer Service

Thank you for contacting Tradeshift Support. In a moment you will be connected with one of our Chat Champions.

Hafi joined the chat

Hafi

Good day! Welcome to Tradeshift Support. My name is Hafi and I will be assisting you today.

How may I help you today?

Type a message here...

zendesk

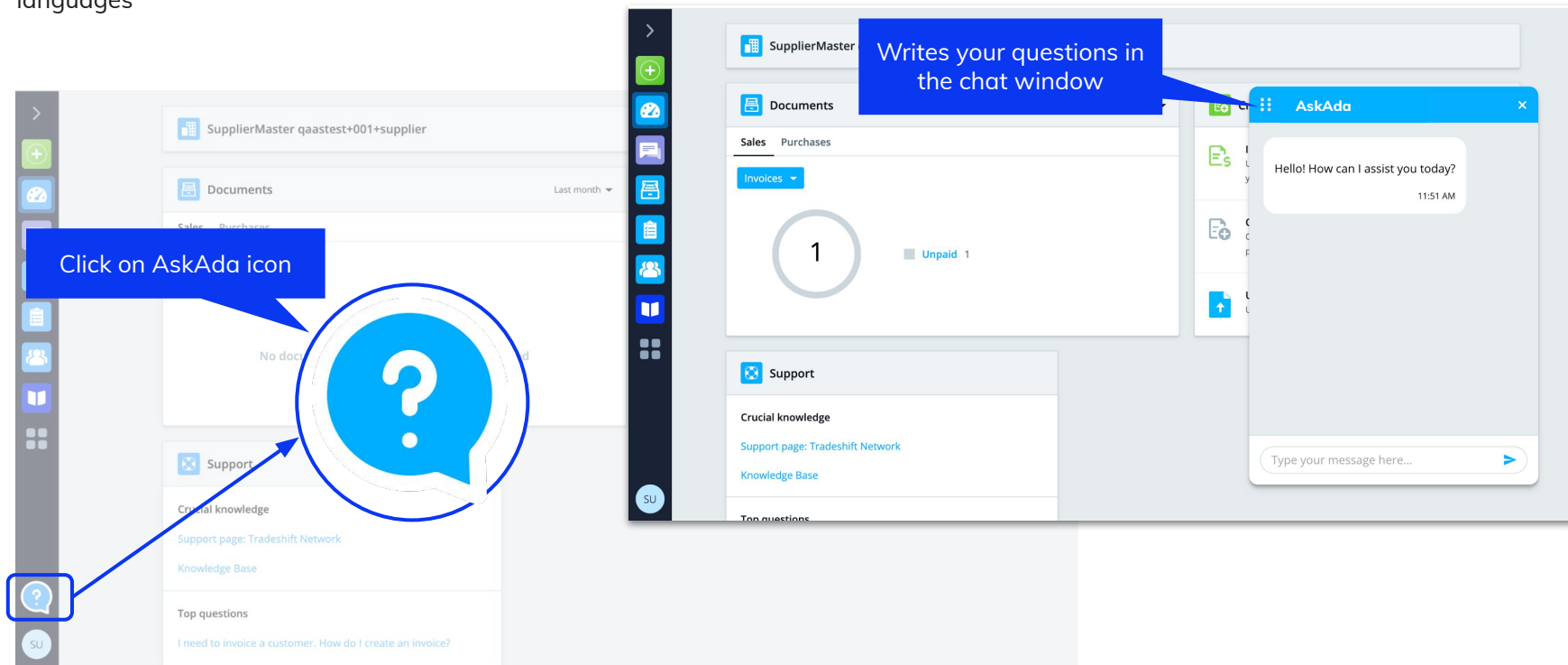
🗺️

🔗

⋮

AskAda

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



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  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