

Onboarding: Getting Started with Tradeshift

Navigating on My Tradeshift Account



Tradeshift

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

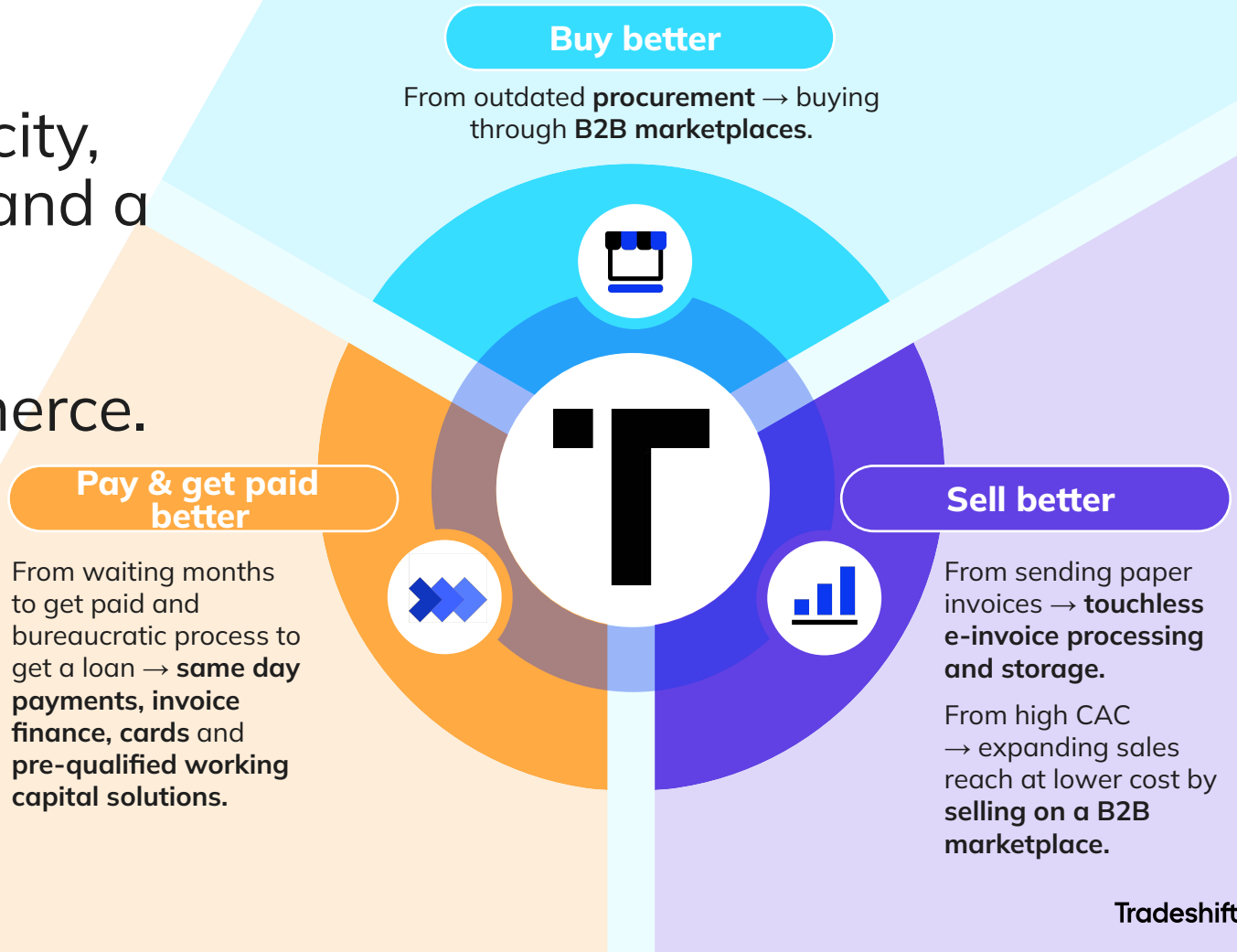


Our Vision

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

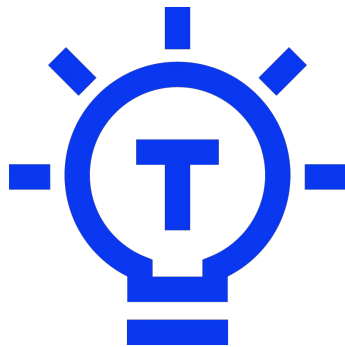


Agenda

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 - c. Notifications
4. Informational Apps: Tradeshift University and Knowledge Base
5. FAQs

Tips: Click on the title to view the relevant topic

Tradeshift Platform Walkthrough

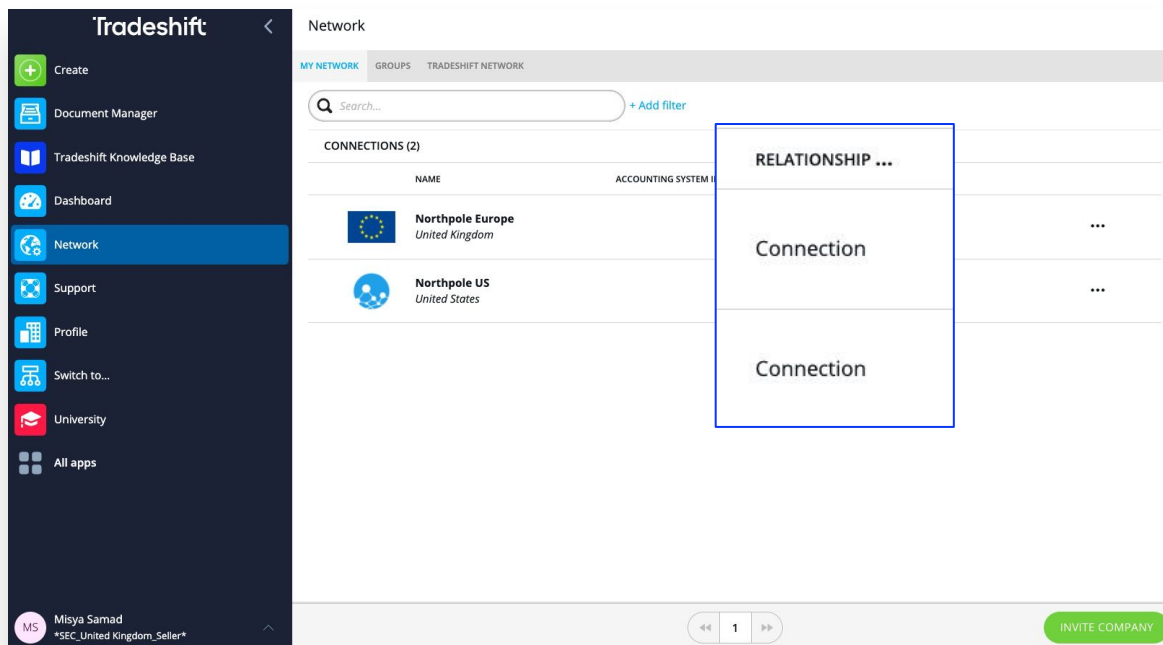


01

Connection Setup

The Network App

The My Network tab contains a list of all of your Tradeshift account's current connections.



Connection Setup

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 items: Create, Dashboard, Document Manager, Task Manager, Users, Tradeshift Knowledge Base, Network (highlighted with a blue callout '1.'), Support, University, and Switch to... The main content area is titled 'Network' and has tabs for 'MY NETWORK', 'GROUPS', and 'TRADESHIFT NETWORK'. A yellow warning banner states: 'You have 3 unverified relationships to review' with a link 'SHOW UNVERIFIED RELATIONSHIPS'. Below this is a search bar and a table of connections. The table has columns: NAME, ACCOUNTING SYSTEM ID, and RELATIONSHIP ... The table lists three entries: 'Chocolate Bar Test Buyer GmbH' (Germany) with status 'Connection' (highlighted with a blue callout '2.'), 'Test Buyer A Limited' (United Kingdom) with status 'Unverified relationship' and a 'VERIFY' button, and 'Test Buyer B Limited' (Austria) with status 'Connection'. At the bottom right is a green 'INVITE COMPANY' 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

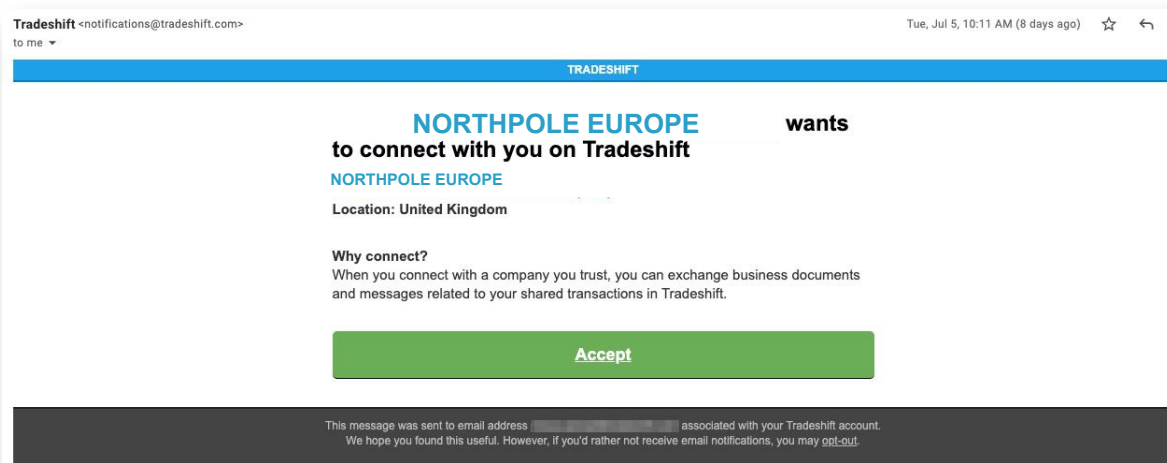
Click 'VERIFY' to accept the connection request

How to accept a connection request

If you have notifications enabled on your account, you will receive an email from Tradeshift every time another company sends you a connection request.

Simply accept the connection request by:

- Clicking on the green Accept button
- You can also accept a connection request by clicking accept in the [Task List app](#) inside your Tradeshift platform account.



02

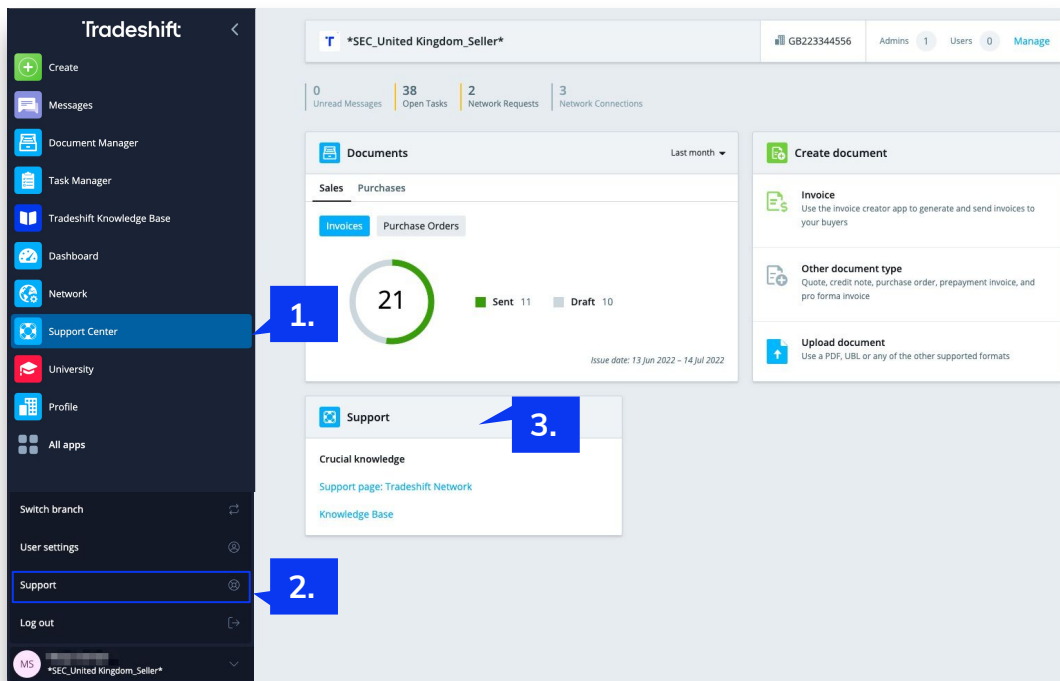
How to Reach Support

Accessing to Support

If you are experiencing any technical issues while using Tradeshift, here is how you can contact us and keep track of your support request.

This can be found by clicking;

- The Support Center app
- The icon with your initials located at the bottom of the left-side launcher
- The Support quick access in the Dashboard

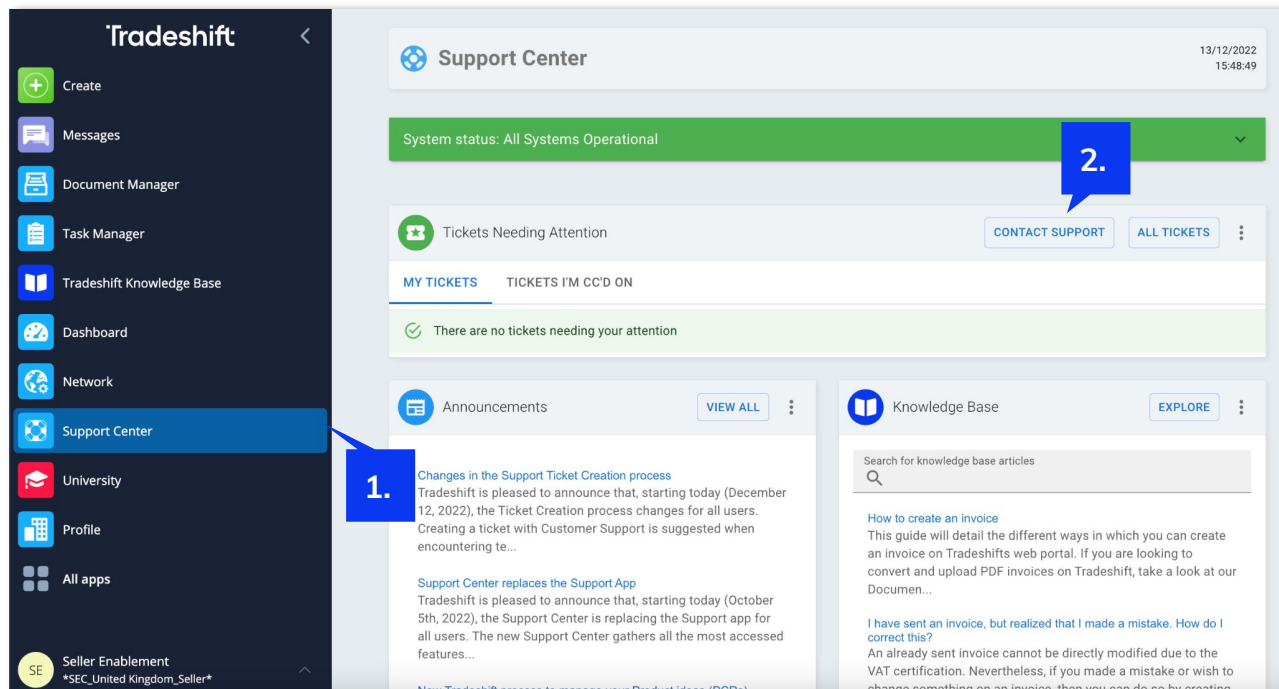


Support Center

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



How to create a Support Ticket

3. Type in the Keywords about the issue that you require assistance. i.e. Activation link/Forgot Password/ Login Error

The screenshot displays the Tradeshift 'Contact Support' interface. On the left is a dark sidebar with the Tradeshift logo and a list of navigation items: Create, Document Manager, Users, University, Support Center, Profile, Dashboard, Network, and All apps. The main content area is titled 'Contact Support' and features a progress bar with three steps: Step 1 (Support Area), Step 2 (Category & Topic), and Step 3 (Create Ticket). Below the progress bar, there is a text input field with the placeholder 'Describe your issue in a few words' and a search bar labeled 'Search in the Knowledge Base*'. A blue callout box with the number '3.' points to the search bar, indicating the current step in the process.

How to create a Support Ticket

4. Please scroll towards the bottom of your page to create a support ticket.

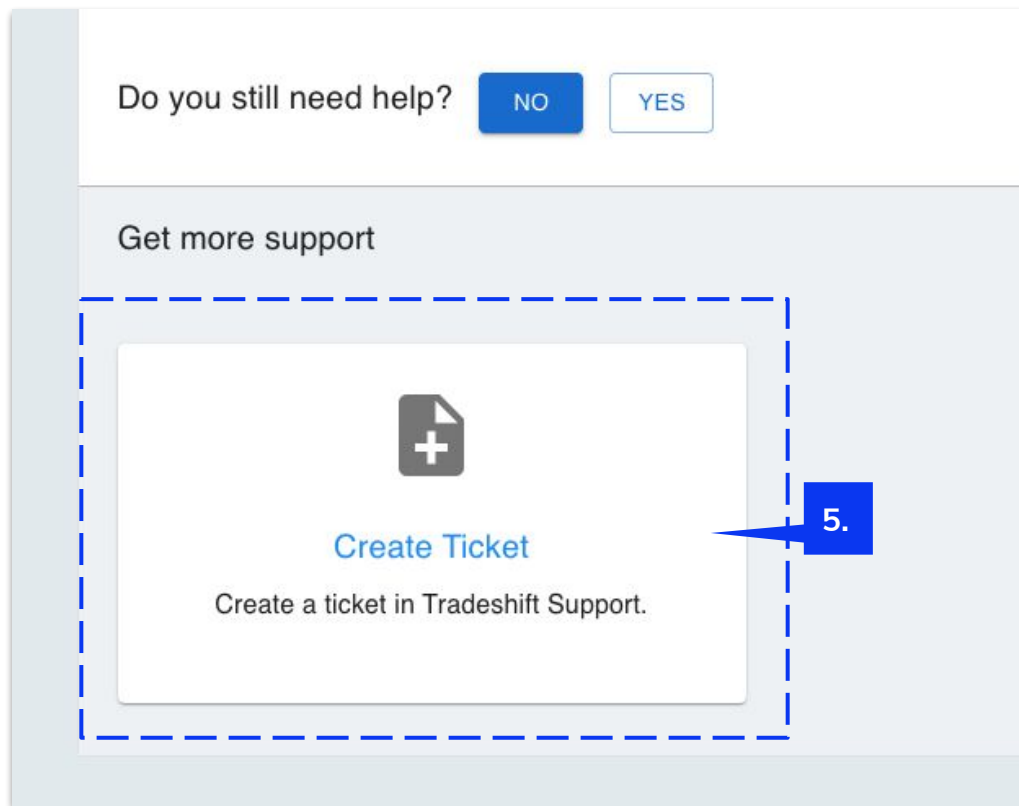
Click **"YES"** to create a ticket.

Note: The page will also show you the self-help articles available to resolve your issue. **However, if you still need help, please proceed to click "YES" at the bottom of the page.**

The screenshot shows the 'Contact Support' interface. At the top, there's a progress bar with three steps: 'Step 1 Support Area', 'Step 2 Category & Topic', and 'Step 3 Create Ticket'. Below this, a text input field is labeled 'Describe your issue in a few words'. Underneath the input field is a search bar with the placeholder text 'Search in the Knowledge Base' and a magnifying glass icon. Below the search bar, there's a section titled 'Helpful trainings and articles' with a sub-header 'Knowledge Base'. This section contains a list of links: 'How to approve an app activation request', 'How to activate your Tradeshift account', 'The App Store', 'I signed up, but I didn't receive the confirmation email. What do I do next?', 'Getting started with Tradeshift', 'November 2021 Release Notes', 'What is PEPOL?', 'I forgot my password. How do I reset it?', 'Supplier onboarding report', and 'How to sign up on Tradeshift'. At the bottom of the form, there's a question 'Do you still need help?' with two buttons: 'NO' and 'YES'. The 'YES' button is circled in red. A blue dashed box surrounds the bottom section of the form. A large blue arrow points downwards on the right side of the form, and a red text label 'Scroll down to create ticket' is positioned next to it. A blue callout bubble with the number '4.' points to the 'YES' button.

How to create a Support Ticket

5. Click “**Create Ticket**”



How to create a Support Ticket

6. Select the relevant description about your issue.
7. Select the sub-topic which is relevant to your issue.

Contact Support

Step 1 Support Area Step 2 Category & Topic Step 3 Create Ticket

Select a category and a topic from the list below

- Account or user related
 - > Password resets
 - > Company profile settings
 - > Change of users
 - > Notification settings
 - > Deletion
 - > Other
- Documents related
- Connection or Network
- Platform or Tradeshift performance issue
- Integrations

How to create a Support Ticket

8. Fill in details as highlighted below;

- Your Country (Mandatory)
- Email Address (Mandatory)
- Full Name (Mandatory)
- Company Name (Mandatory)
- Collaborators (CCs - Email Addresses)
- Subject: The title of the issue. (i.e. Missing Documents/ Unable to submit documents) (Mandatory)

The screenshot shows a 'Contact Support' modal window with a three-step progress bar at the top: Step 1 (Support Area) is complete, Step 2 (Category & Topic) is complete, and Step 3 (Create Ticket) is the current step. The form title is 'Please, fill out the form below in order to create a ticket for the issue **Company profile settings**'. The form fields are: 'Your Country*' (a dropdown menu showing 'United States'), 'Email Address (of the Account)*' (a text field containing 'se-support+test_us@tradeshift.com'), 'Full Name*' (a text field with a blurred placeholder), 'Company Name*' (a text field with a blurred placeholder), 'Collaborators (CCs - Email Addresses)' (a text field with a blurred placeholder), and 'Subject*' (a text field containing 'Missing Document'). A sidebar on the left contains various icons, and a green circle with the letter 'S' is at the bottom left of the modal.

How to create a Support Ticket

9. Please describe the issues that you're facing. **(Mandatory)**
 - We highly recommend to add as many information for our support to understand the issue.
 - We also encourage you to add your customer's name, company VAT number/Company identification & etc.
 - Please take note request description must have at least 100 characters.
10. Attachment. **(Mandatory)**
 - We also highly encourage you to add any screenshot image of the problem you face in the platform.
 - Besides, you can also add a copy of your invoice copy incase you have issues with missing document or needed to connect with your customer.
11. Select Buyer **(Mandatory)**
12. Please select "Create Ticket" **(Mandatory)**

The screenshot shows a 'Contact Support' form with the following fields and elements:

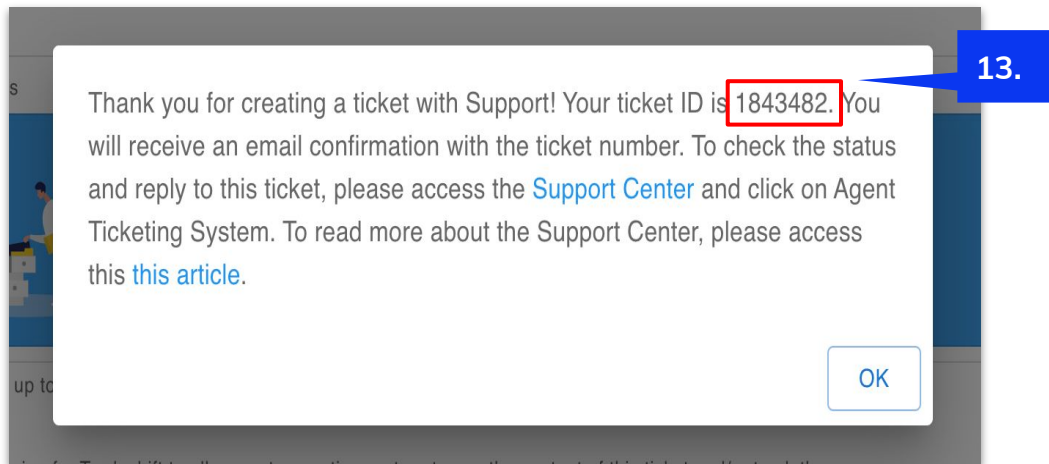
- Subject***: A text input field containing 'Missing Documents'.
- Description***: A text area containing 'Missing Document.', 'PO Document Number: x1739052840', and 'Customer Name: Customer X'. Below the text area is a note: 'Request description must be at least 100 characters long. Please be as detailed and descriptive as possible.'
- Attachments**: A blue box with a drag-and-drop icon and the text '[Drag and drop] or CLICK HERE to select files'. Below the box is a note: 'You can add up to 10 attachments. Each attachment size must be under 20M.'
- Permissions**: A checkbox labeled 'I give permission for Tradeshift to allow my transacting partner to see the content of this ticket and/or track the progress, if it is related to my relationship or transactions with the transacting partner and such access would help the resolution efforts.' The checkbox is currently checked.
- Select Buyer***: A dropdown menu with a small icon of a person.
- CREATE TICKET**: A large blue button.
- BACK**: A small button.

Numbered callouts point to the following elements:

- 9.** Points to the Description* text area.
- 10.** Points to the Attachments box.
- 11.** Points to the Select Buyer* dropdown menu.
- 12.** Points to the CREATE TICKET button.

How to create a Support Ticket

13. You have successfully created a ticket with Tradeshift Support. The ticket number will your reference to track the progress of the matter.



Your Customer's Landing Page

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

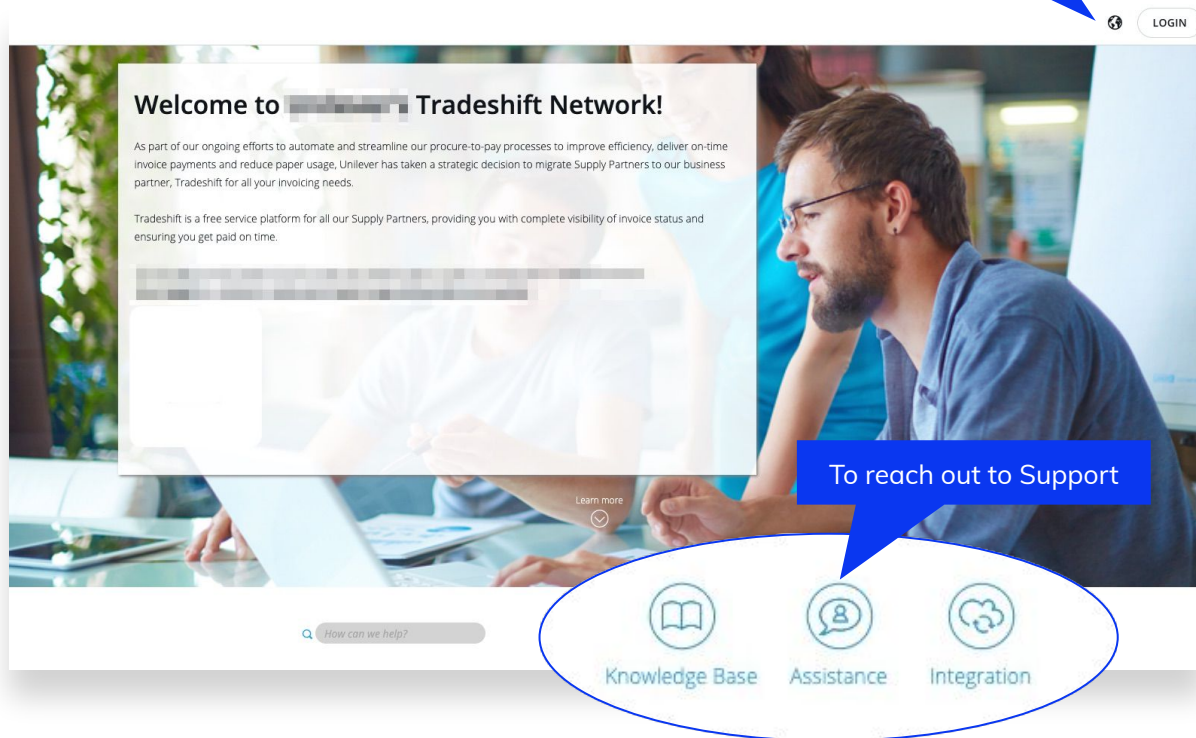
You will be able to read through the options we have and decide on the most suitable invoicing method on Tradeshift which meets your billing scenario.

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

Tax number (EIN/TIN) : 34-3483424
[Change recipient](#)

Legal Entity
Select entity

Invoice number

Next number: INVtest13

Issue date * Currency

Purchase order number

Item ID Description Quantity Unit Price Tax rate

10	TEST Product 10	150,000	pcs	2.50	12%
----	-----------------	---------	-----	------	-----

Order number

[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.

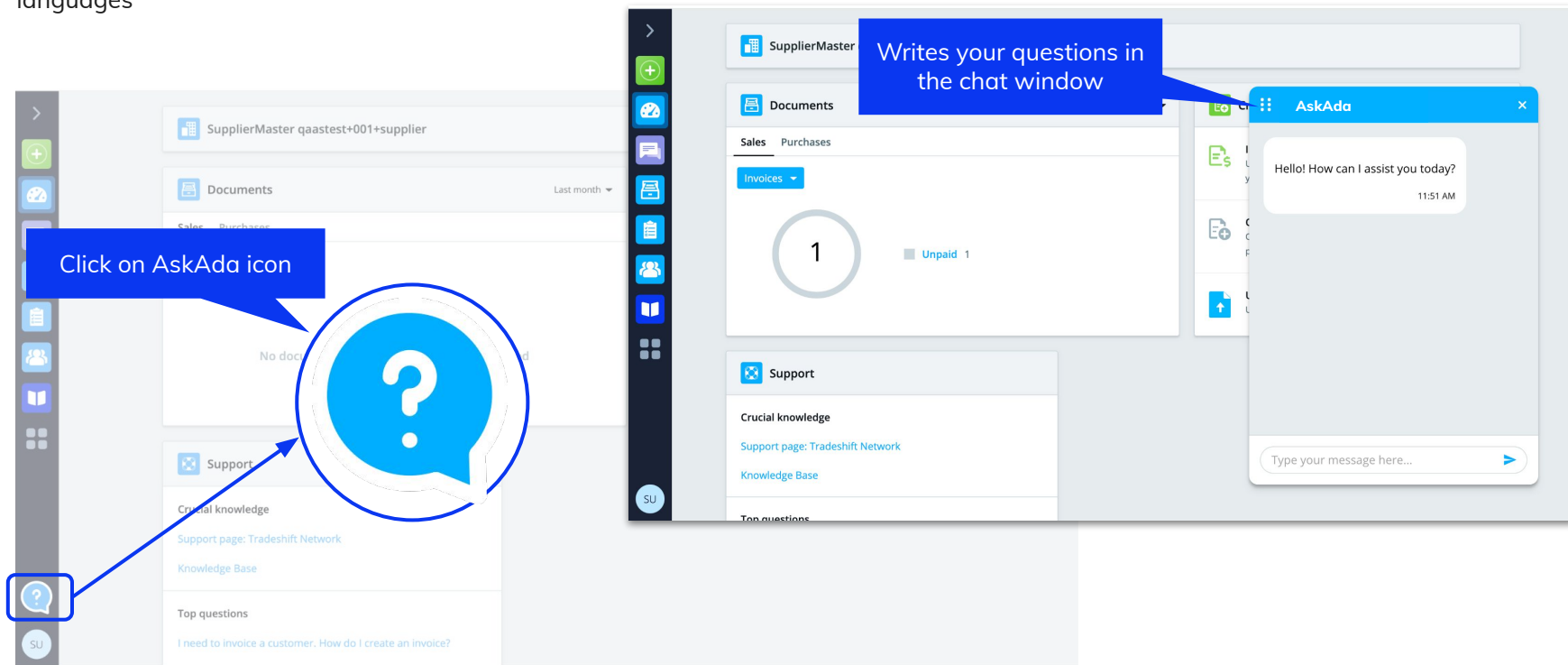
How may I help you today?

Type a message here...

zendesk

AskAda

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



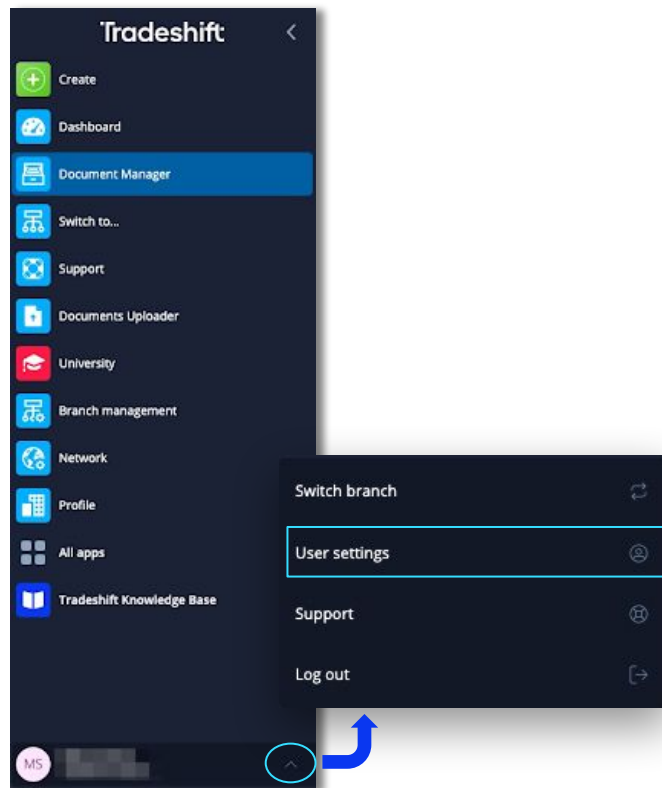
03

Settings and Configuration

Where do I access my user settings?

Your user settings can be found by clicking the account icon with your name initials located at the bottom of the left-side launcher.

Just click on the User settings to access your basic Tradeshift account details and notification settings.



User Details

From the User details tab, you can edit the basic details for your Tradeshift account.

- Email address
- First and last name
- Language
- Password

User details

Notifications

Basic details for your Tradeshift account

Email address [Change email](#)

First name

Last name

Language
English (UK)

Time zone
GMT+08:00

Terms of Service
[View Terms of Service](#)

Sign in

You can sign in to Tradeshift with the following accounts:

Google
[Remove credential provider](#)

[Change password](#) [Save changes](#)

Click here to complete any changes made on the user details

Notifications

The Notifications tab allows you to edit your notification settings.

Here you can select and deselect the notification options according to your preferences. We strongly recommend keeping all of them active in order not to miss any important changes on Tradeshift.

Refer to [this article](#) for more information about notification.

Notifications

[Add new email](#)

Send email to misya.samad@tradeshift.com when:

Tradeshift: Network notifications

- ☐ Another user recommends your company
- ☐ Another user sends you a request to join their network

Tradeshift: Document notifications

- ☐ The sending of a document fails
- ☐ One of your contacts changes the state of a document
- ☐ One of your contacts posts a comment on a document
- ☐ You receive a document

Tradeshift: Assignments notifications

- ☐ A task was assigned to you
- ☐ You receive a reminder about a pending assignment
- ☐ An assignment was escalated to you

Tradeshift: Announcement notifications

- ☐ One of your connections sends an announcement to you
- ☐ Your company sends an announcement to you

Tradeshift: Collaboration notifications

- ☐ Someone adds a message to a conversation you are participating in
- ☐ You are invited or added to a conversation

[Manage my product update and marketing preferences](#)

Update notification settings →

Click here to complete any changes made on the notification

04

**Tradeshift
University &
Knowledge Base**

Knowledge Base

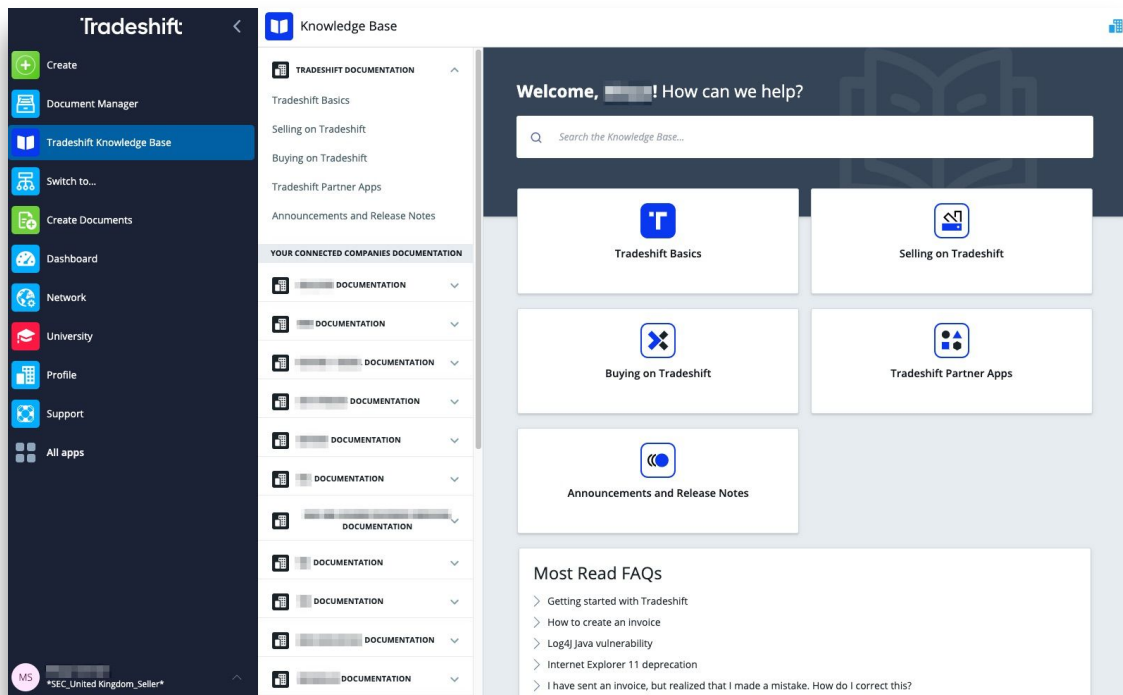
The Knowledge Base is our support and learning center that includes written articles about the Tradeshift platform and features, as well as company-specific articles.

Tradeshift Documentation

- Documentation and FAQs on Tradeshift. This documentation is visible to all users.

Your Connected Companies Documentation

- Information about the company's specific business processes or use cases on Tradeshift.



Tradeshift University

Known as Tradeshift's eLearning platform where you can learn about capabilities of our Platform using videos, shared documents and, also pass short quizzes.

The University widget in Dashboard Apps two video courses which are the same for all users – **Getting Started** and **Documents basics**



University



Getting Started

So Tradeshift has sparked your interest! We're here to help you get started!

- Welcome!
- Terminology



Documents basics

Tradeshift enables you to send and receive all sorts of electronic documents! There's a lot to cover, so let's get started!

- Sending methods
- Documents in the Tradeshift portal
- Managing your documents

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 offer an EDI integration option to automate the invoicing process for high invoice volume suppliers. 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