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.

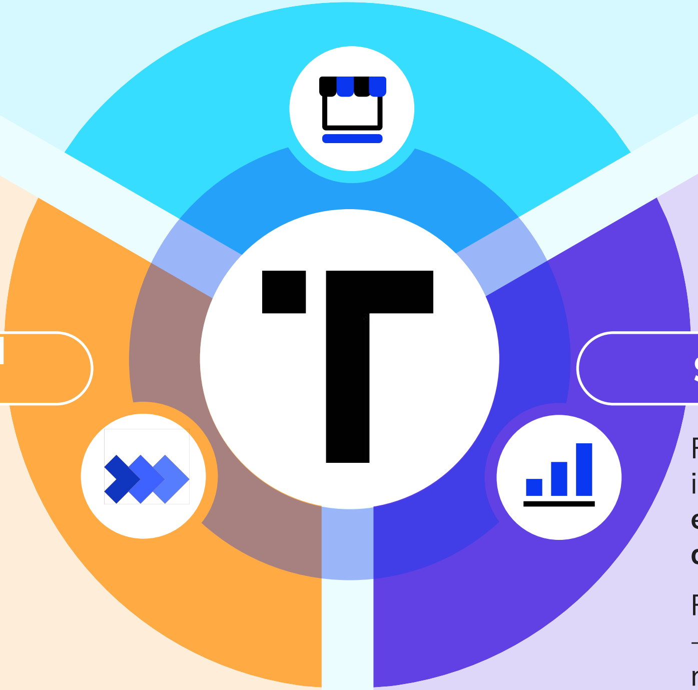
Our Vision

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

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

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From outdated **procurement** → buying through **B2B marketplaces.**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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    c. How to accept a connection request?
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    e. AskAda
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5. FAQs

Tips: Click on the title to view the relevant topic

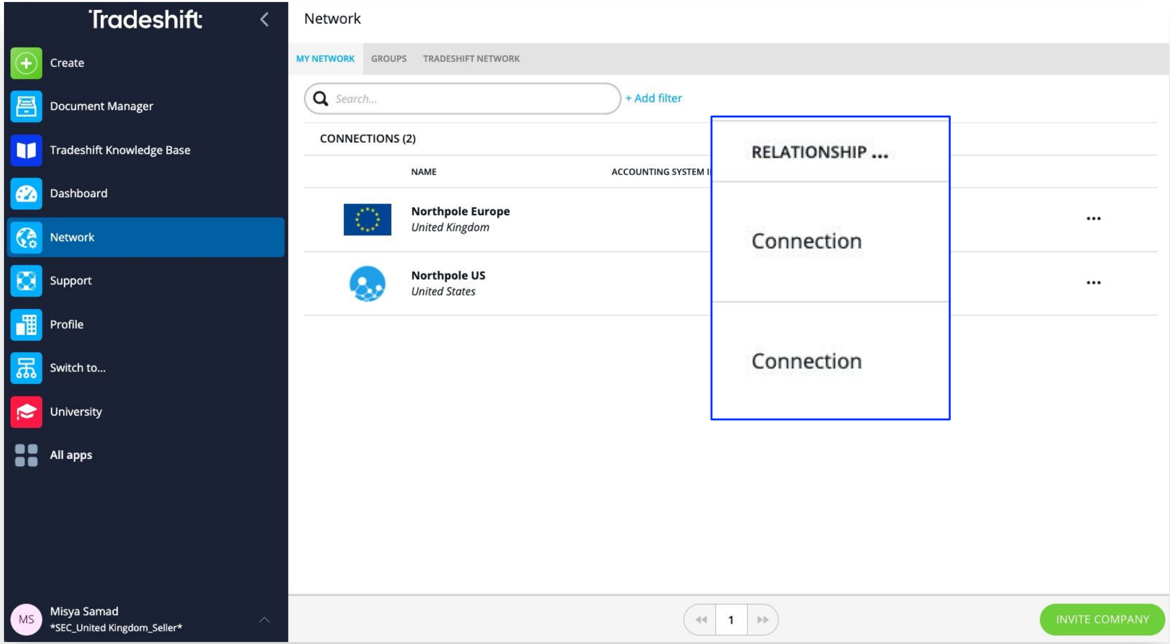
Tradeshift Platform Walkthrough

01

Connection Setup

The Network App

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



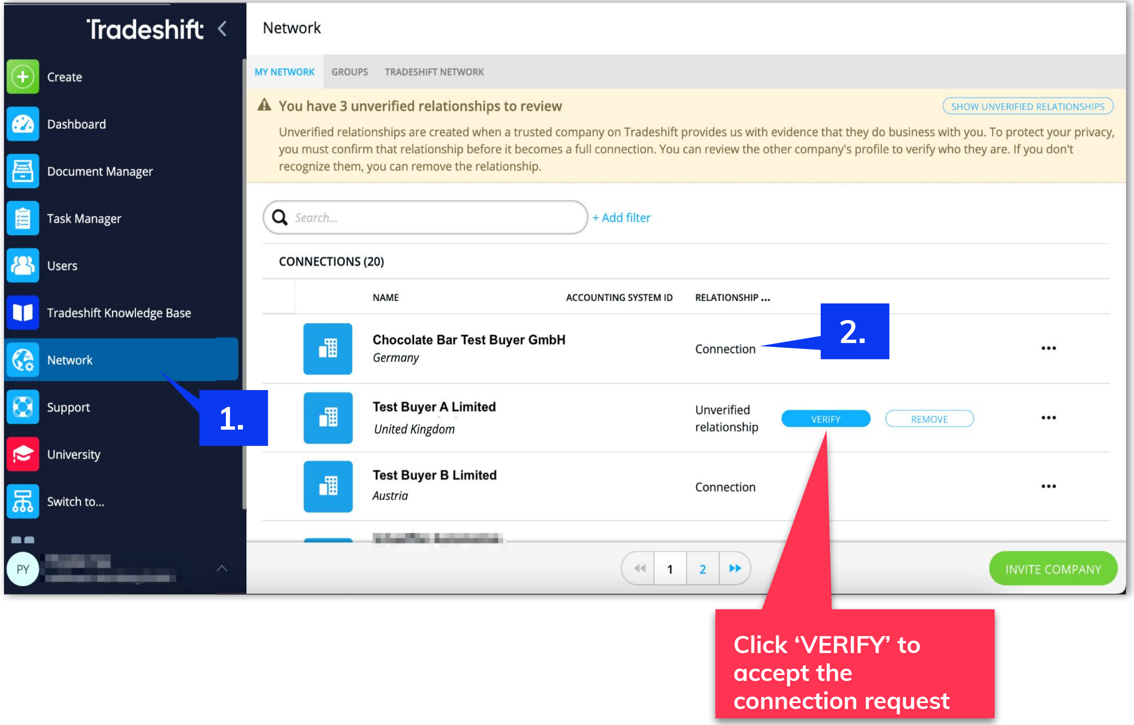
Connection Setup

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

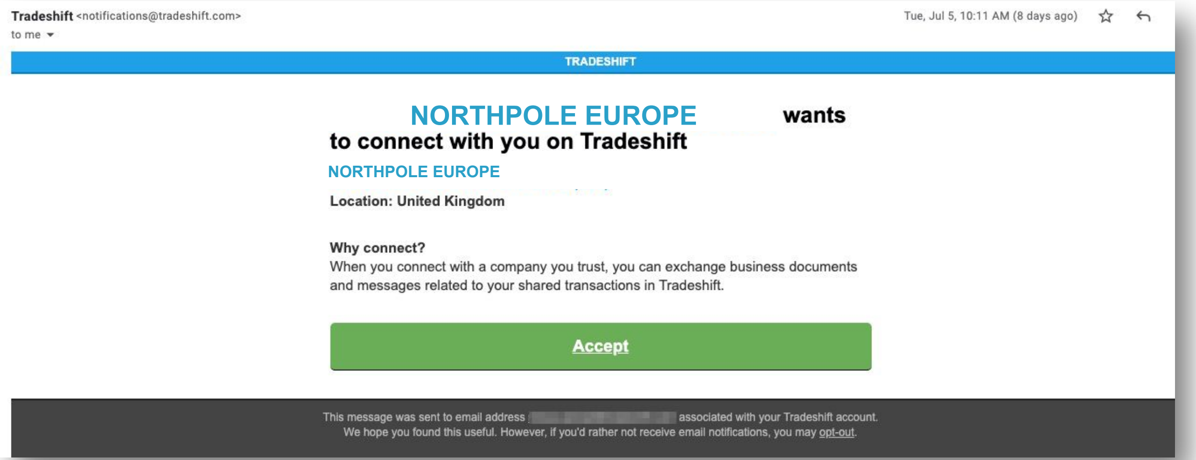


How to accept a connection request

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

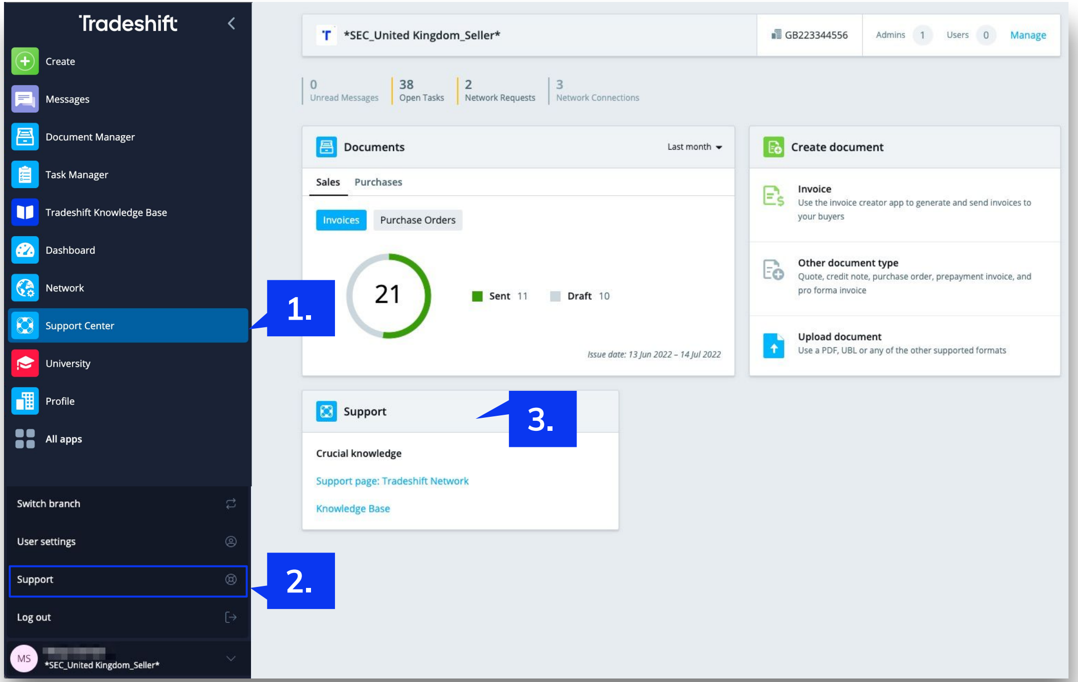
How to Reach Support

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



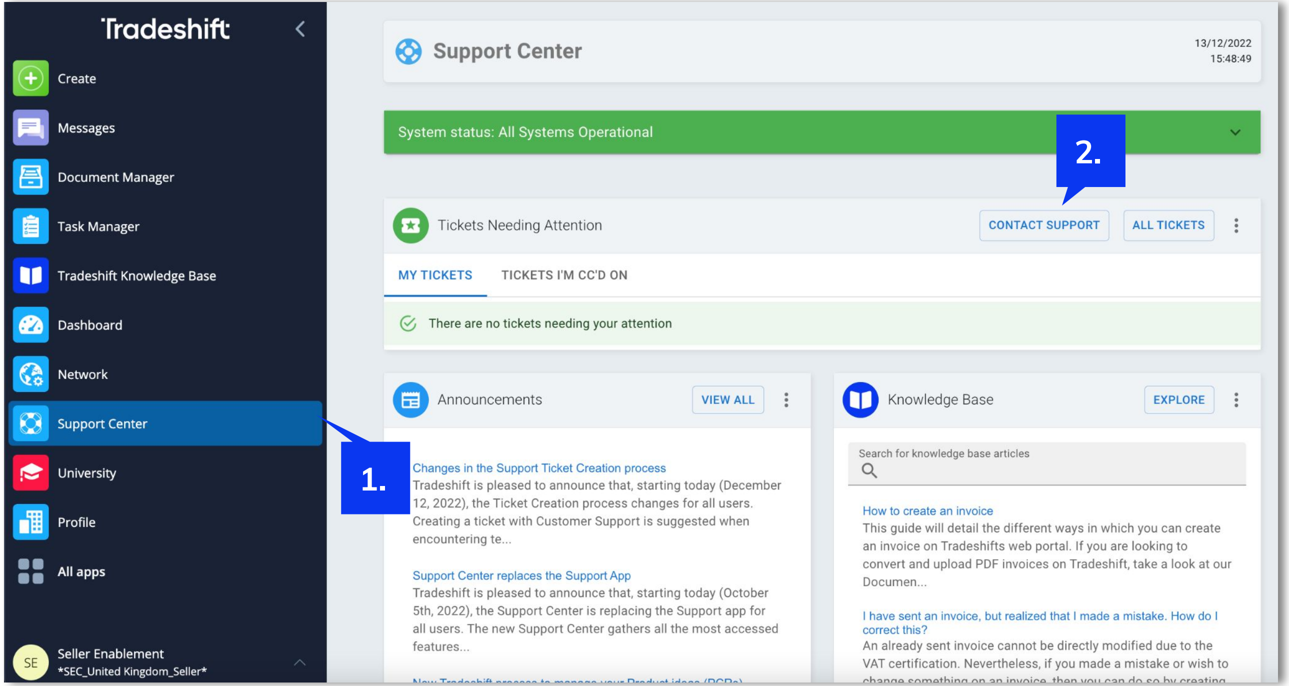
Support Center

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:

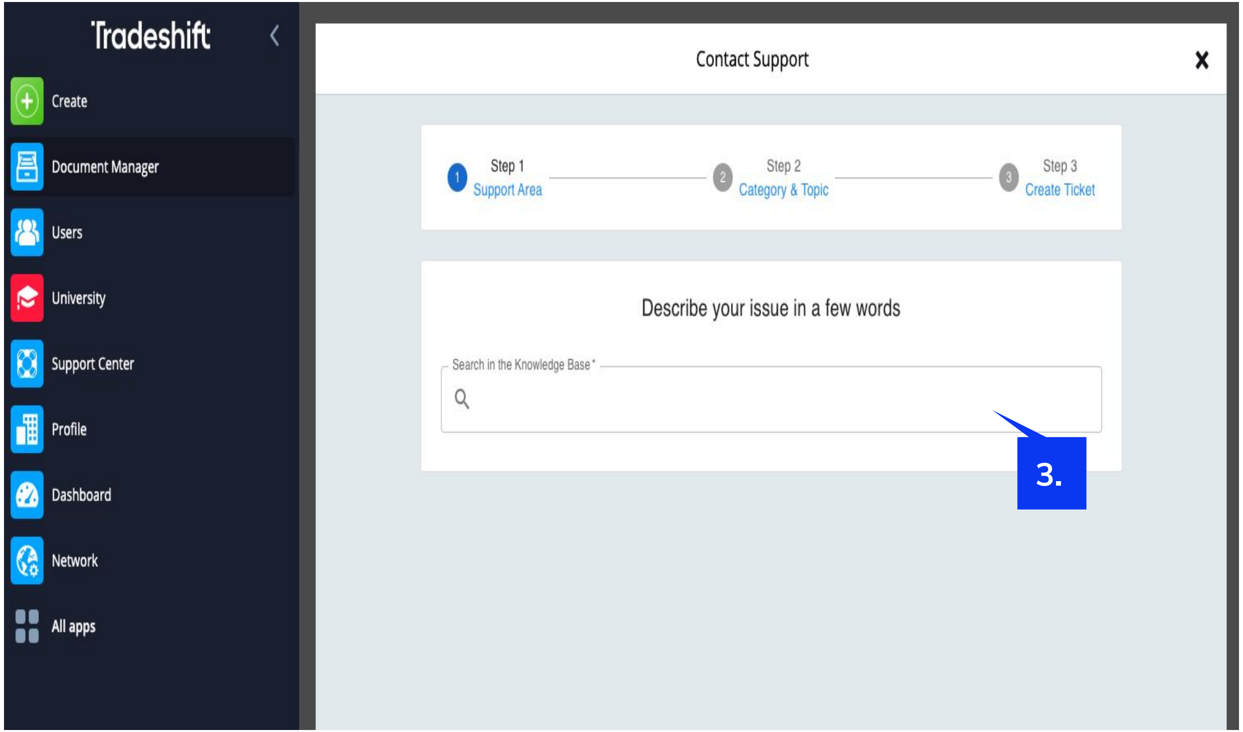
1. Access the [**Support Center**] application. Click on [All apps] to search for this application if you could not find it on the left toolbar

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



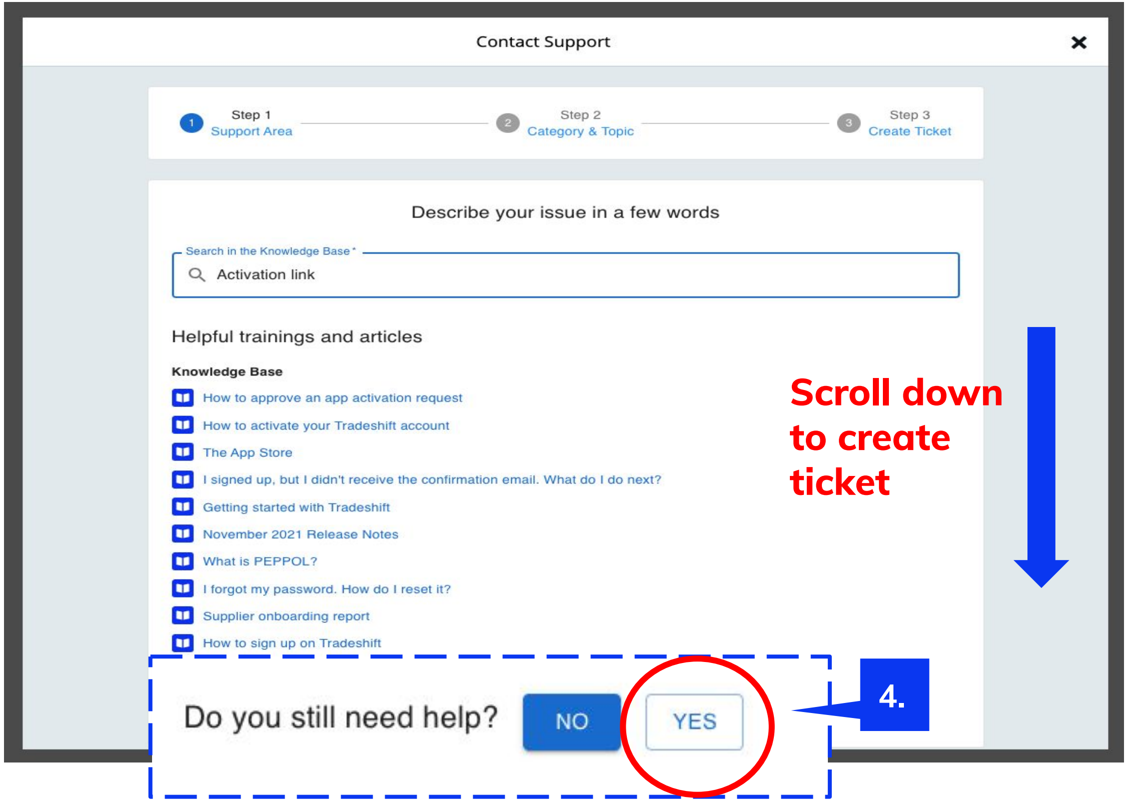
Tradeshift

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.

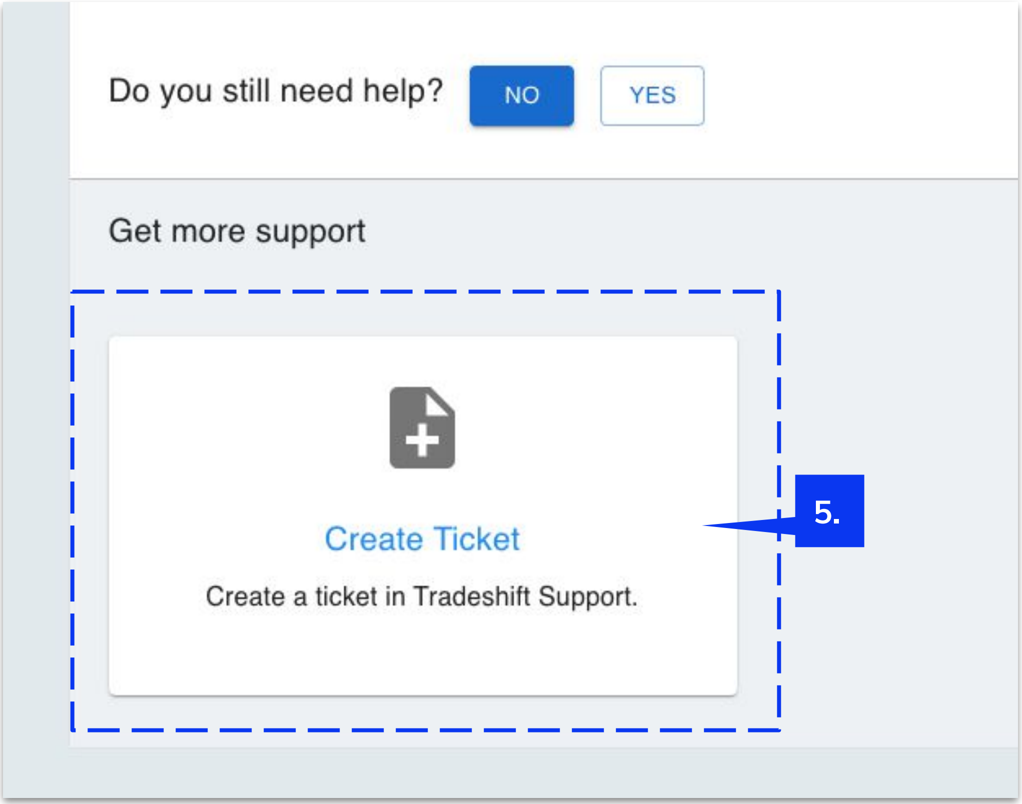
Note: The page will also show you the self-help articles available to resolve your issue. **However, if you still need help, please proceed to click "YES" at the bottom of the page.**



Tradeshift

How to create a Support Ticket

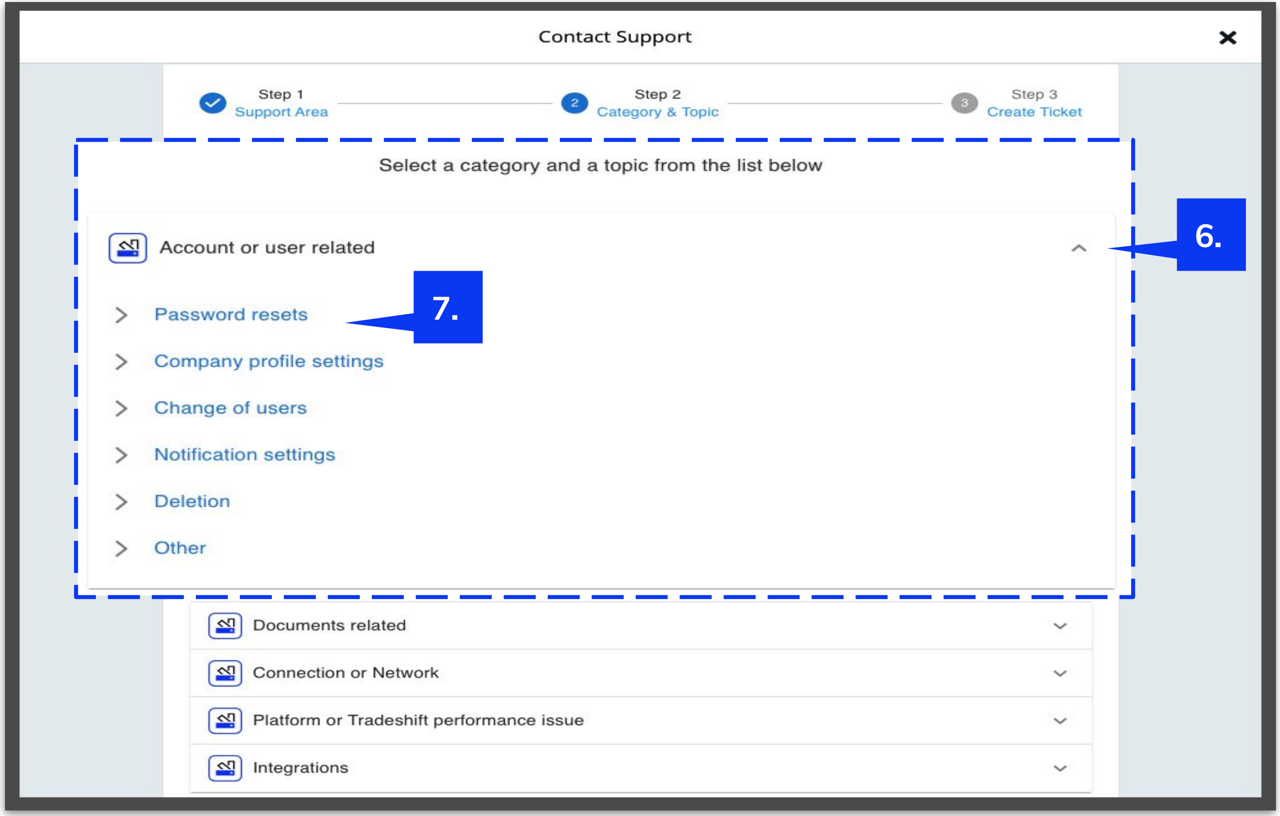
5. Click “**Create Ticket**”



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.



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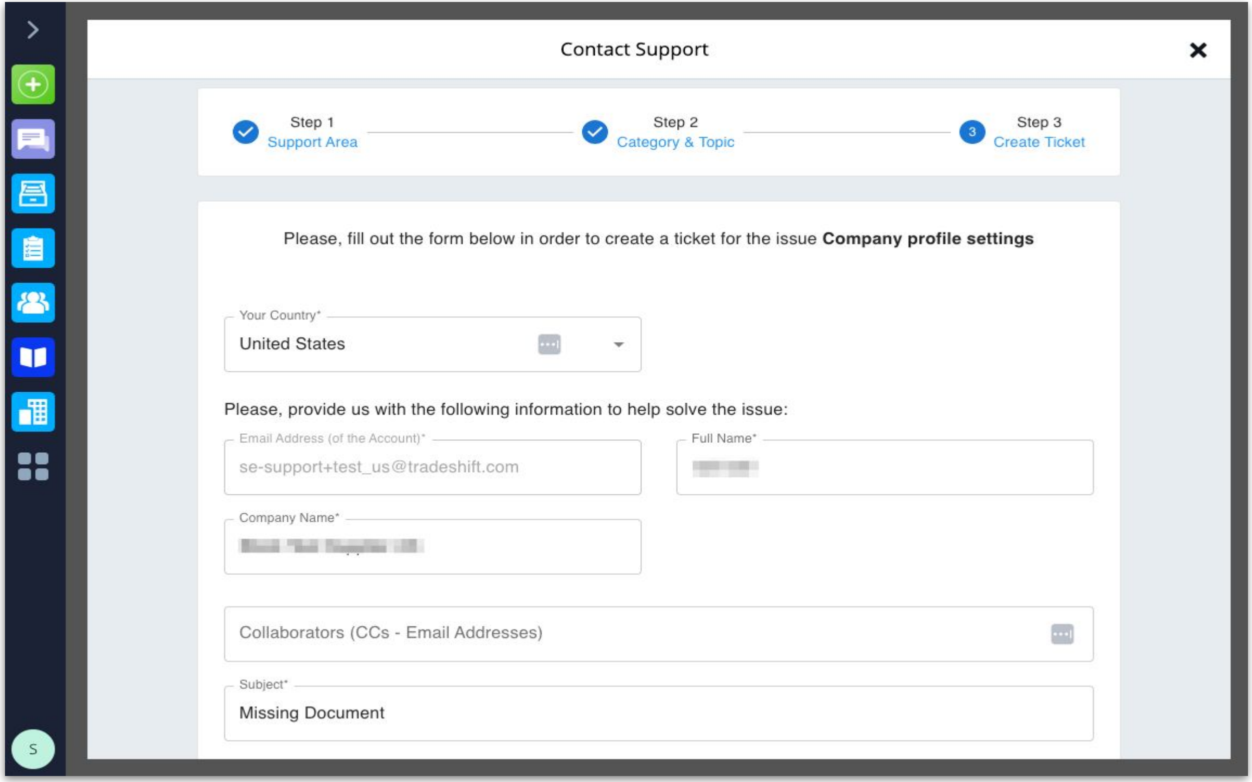
How to create a Support Ticket

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)

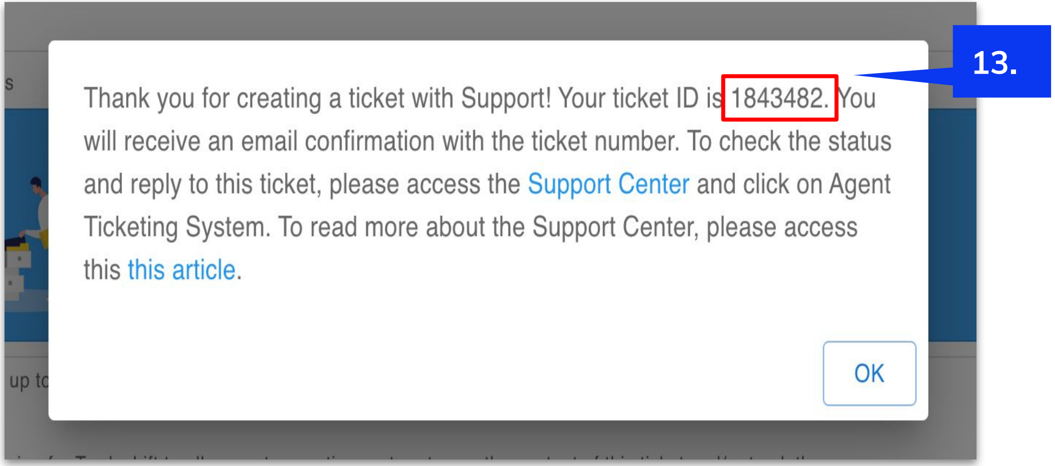


How to create a Support Ticket

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)

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.



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Your Customer's Landing Page

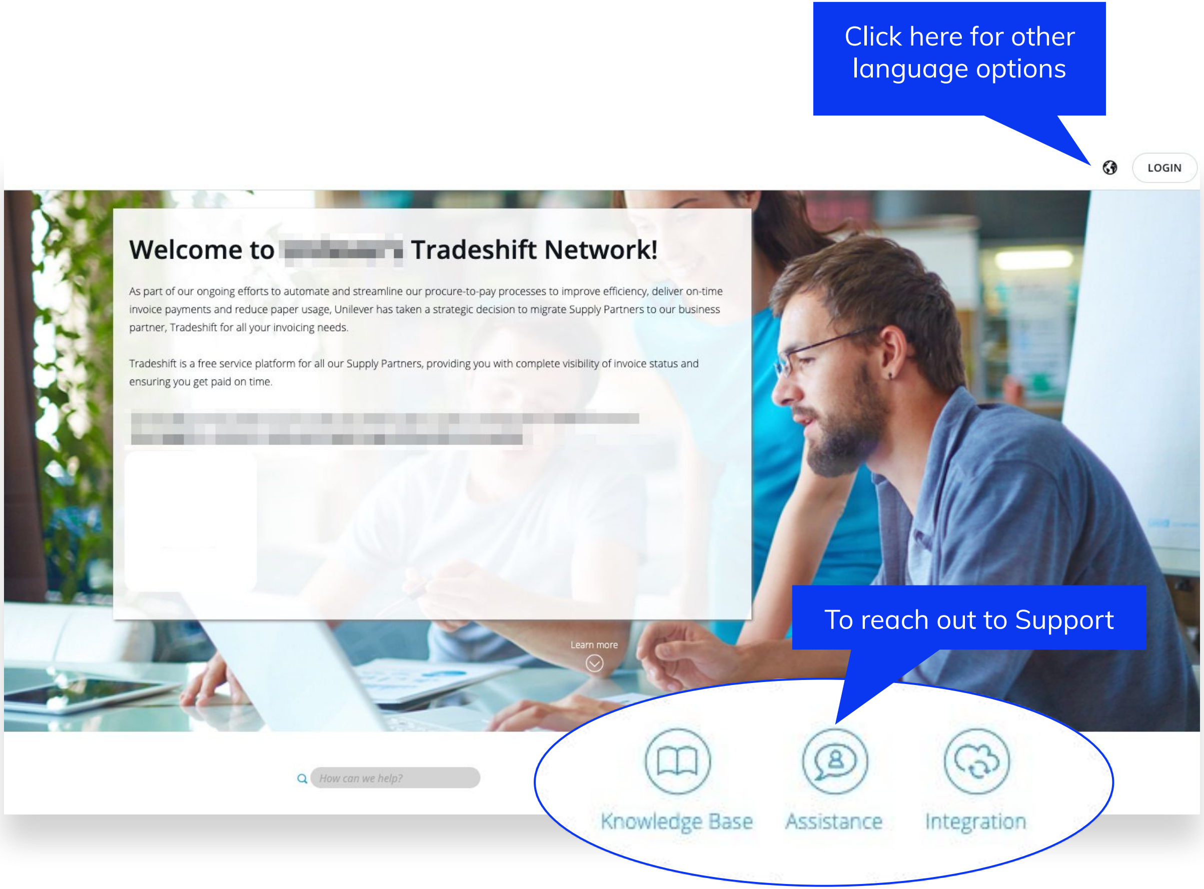
Landing page is where you will find all necessary information regarding your Customer's transition to Tradeshift.

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.

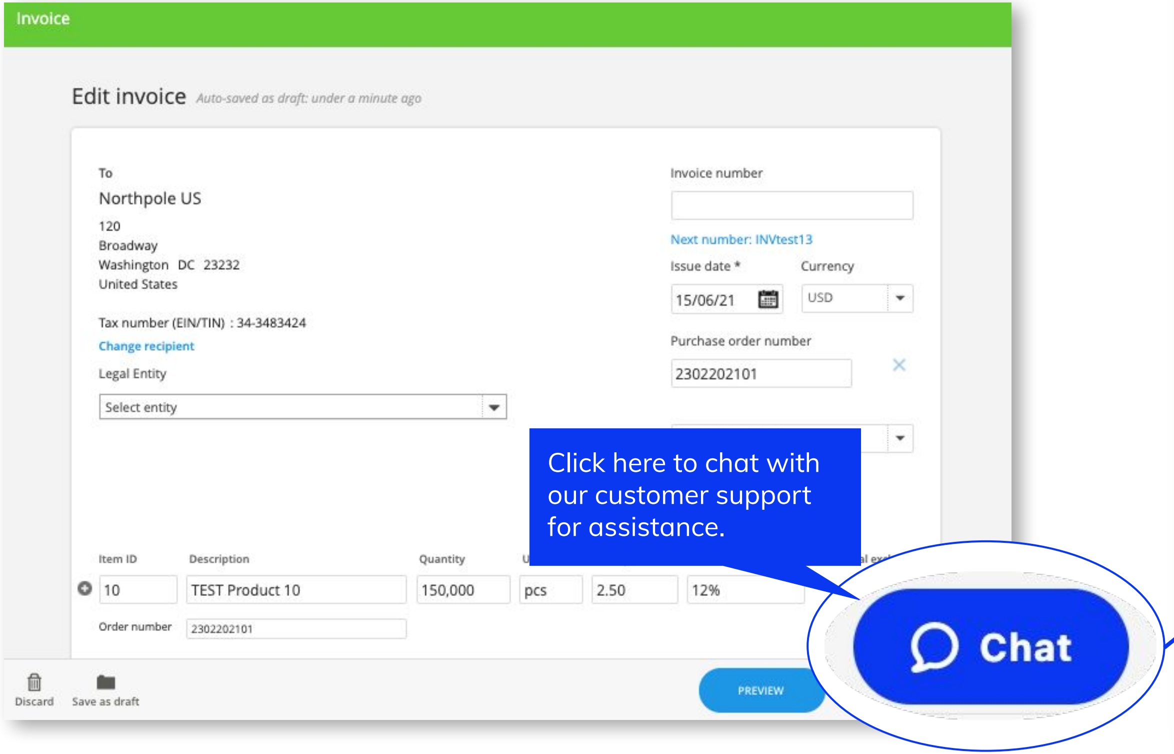
Nevertheless, you may refer here for general information: support.tradeshift.com

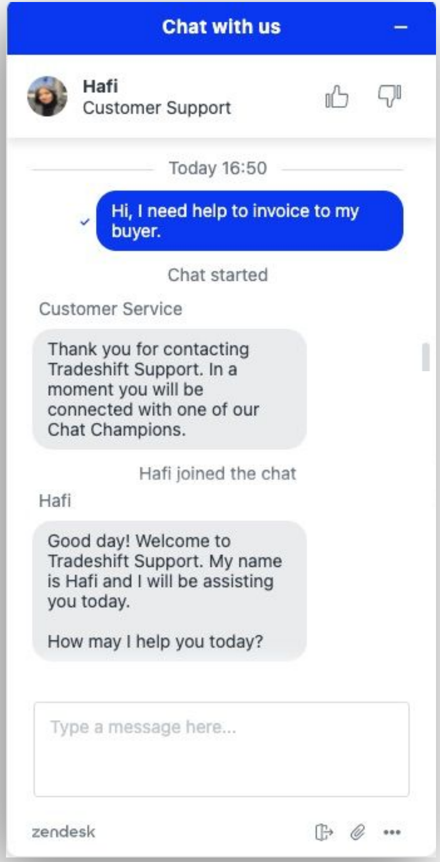


Tradeshift

Chat Function

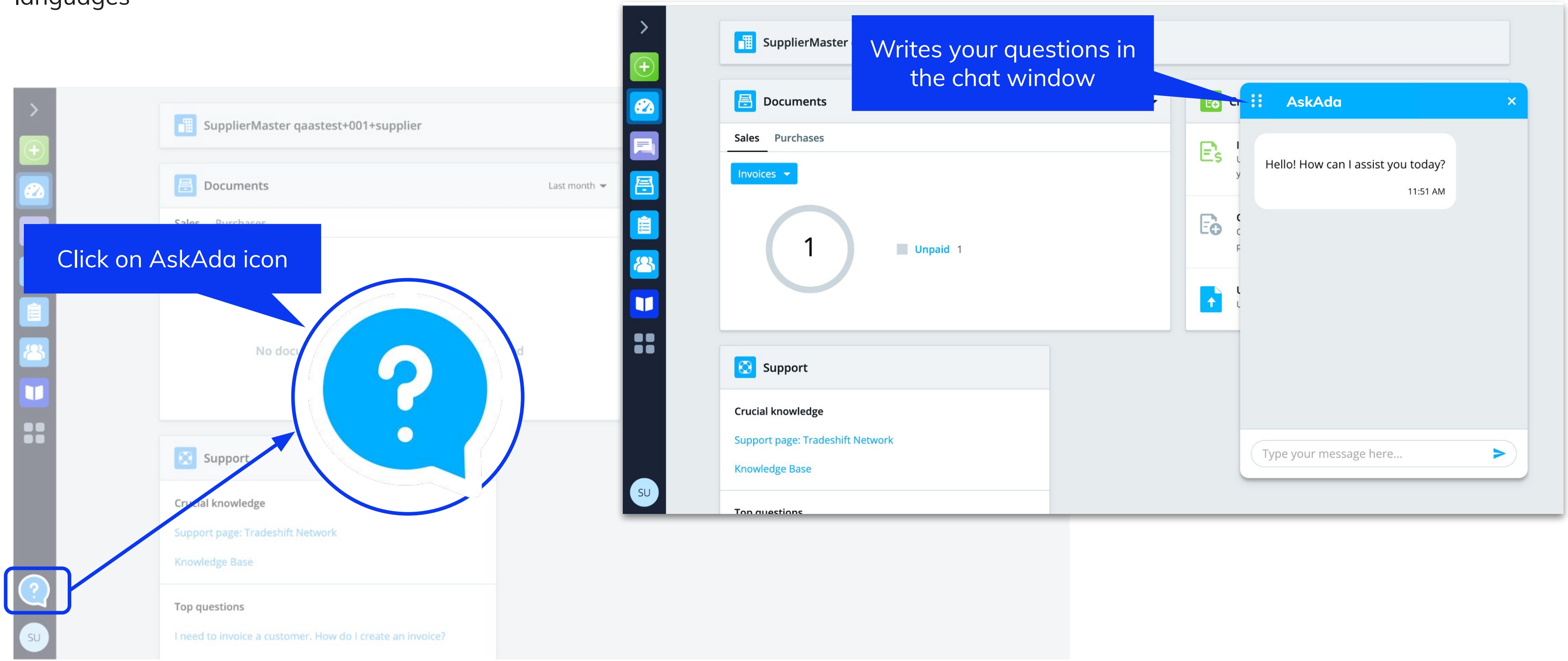
Live Chat support is available on working days (Monday ~ Friday)





AskAda

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



Tradeshift

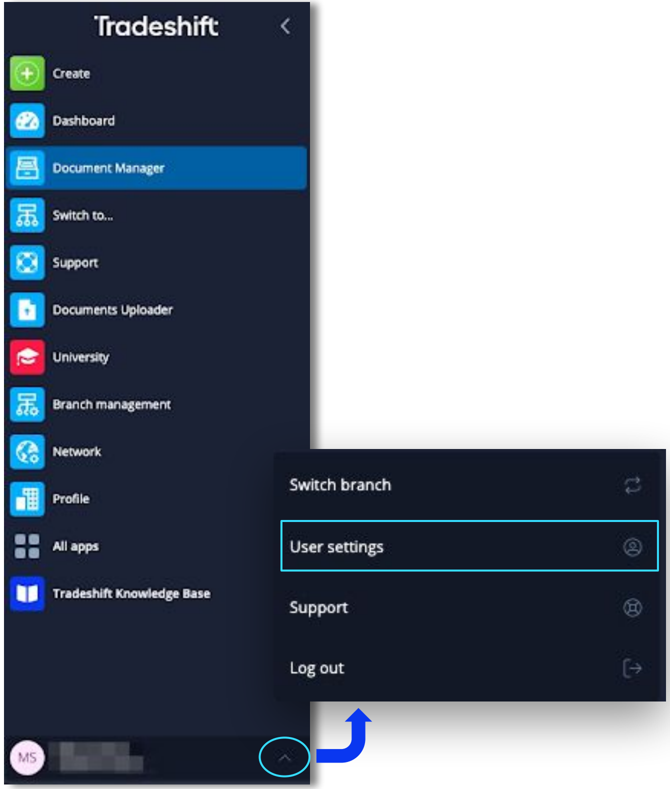
03

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.

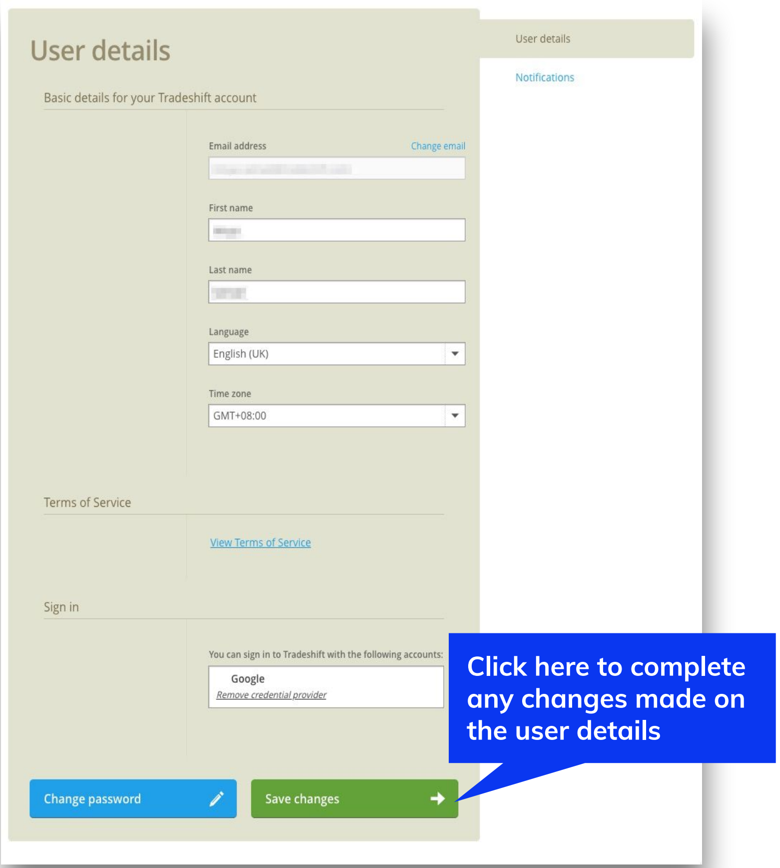
Just click on the User settings to access your basic Tradeshift account details and notification settings.



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



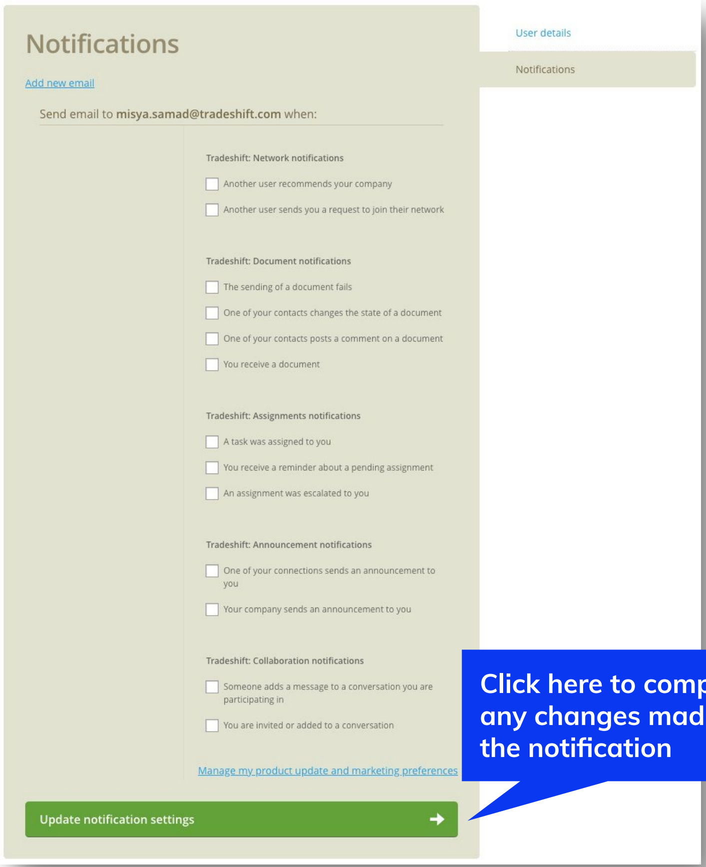
Tradeshift

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.



Click here to complete any changes made on the notification

Tradeshift

04

Tradeshift University & Knowledge Base

Knowledge Base

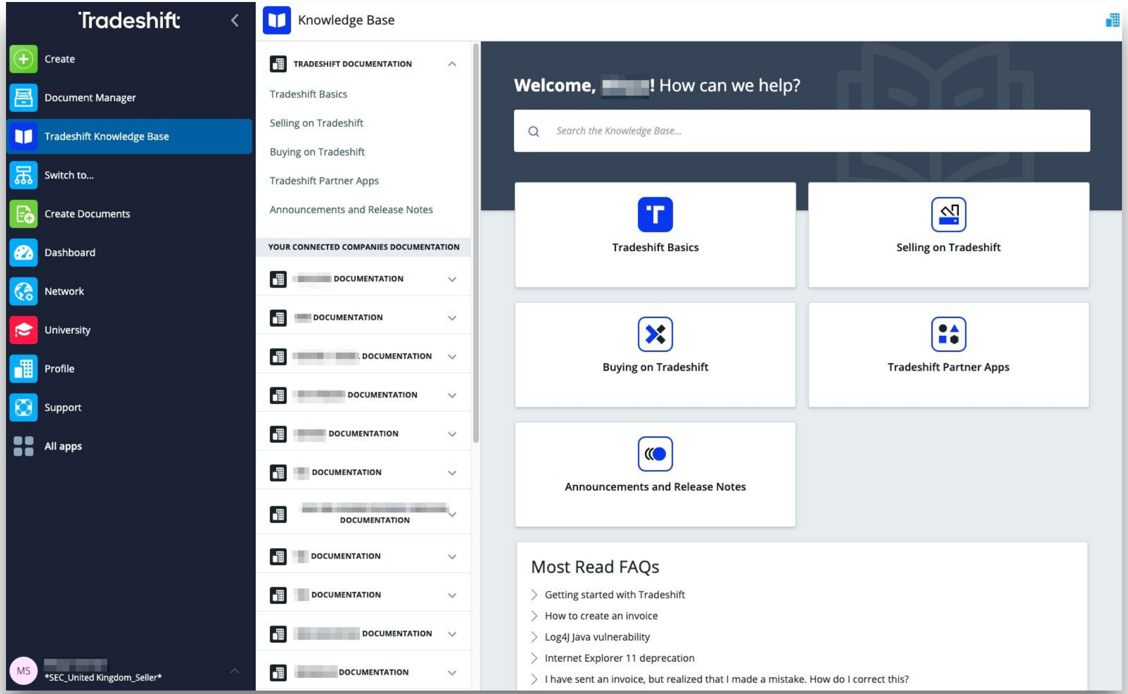
The Knowledge Base is our support and learning center that includes written articles about the Tradeshift platform and features, as well as company-specific articles.

Tradeshift Documentation

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

Your Connected Companies Documentation

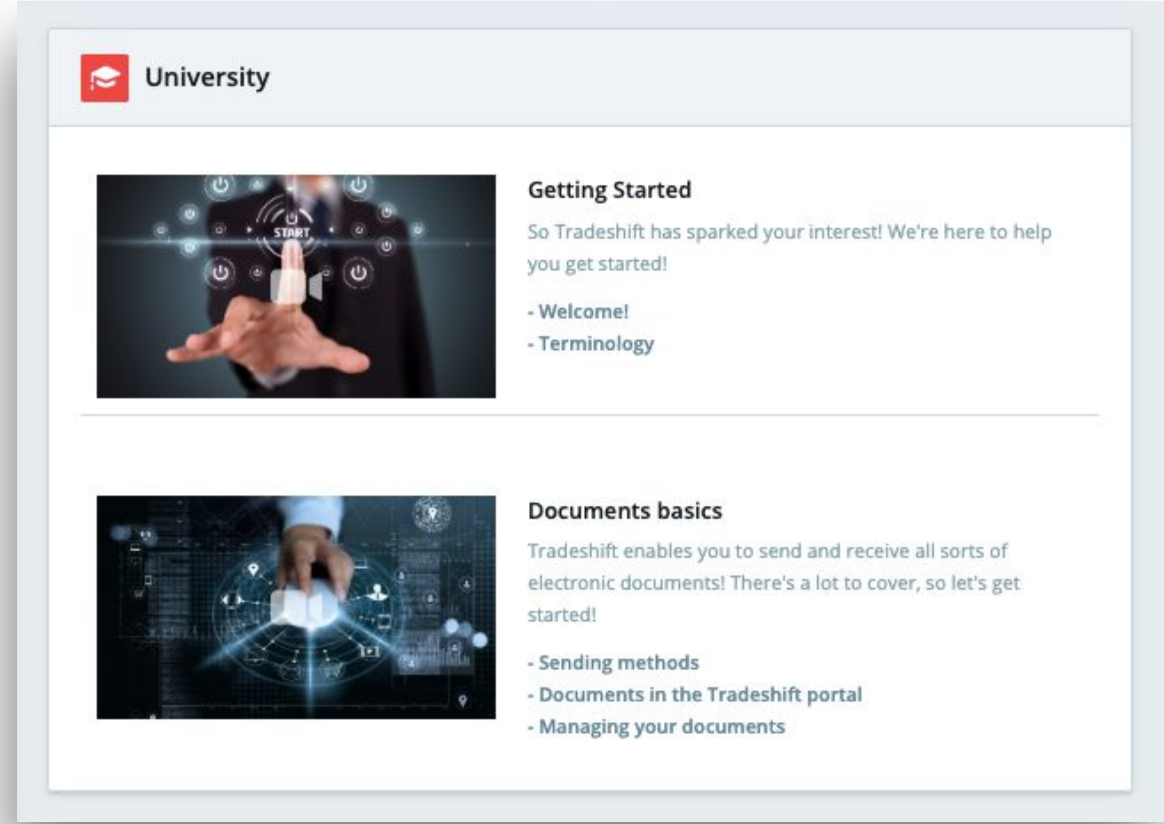
- Information about the company's specific business processes or use cases on Tradeshift.



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**



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.](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!

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