

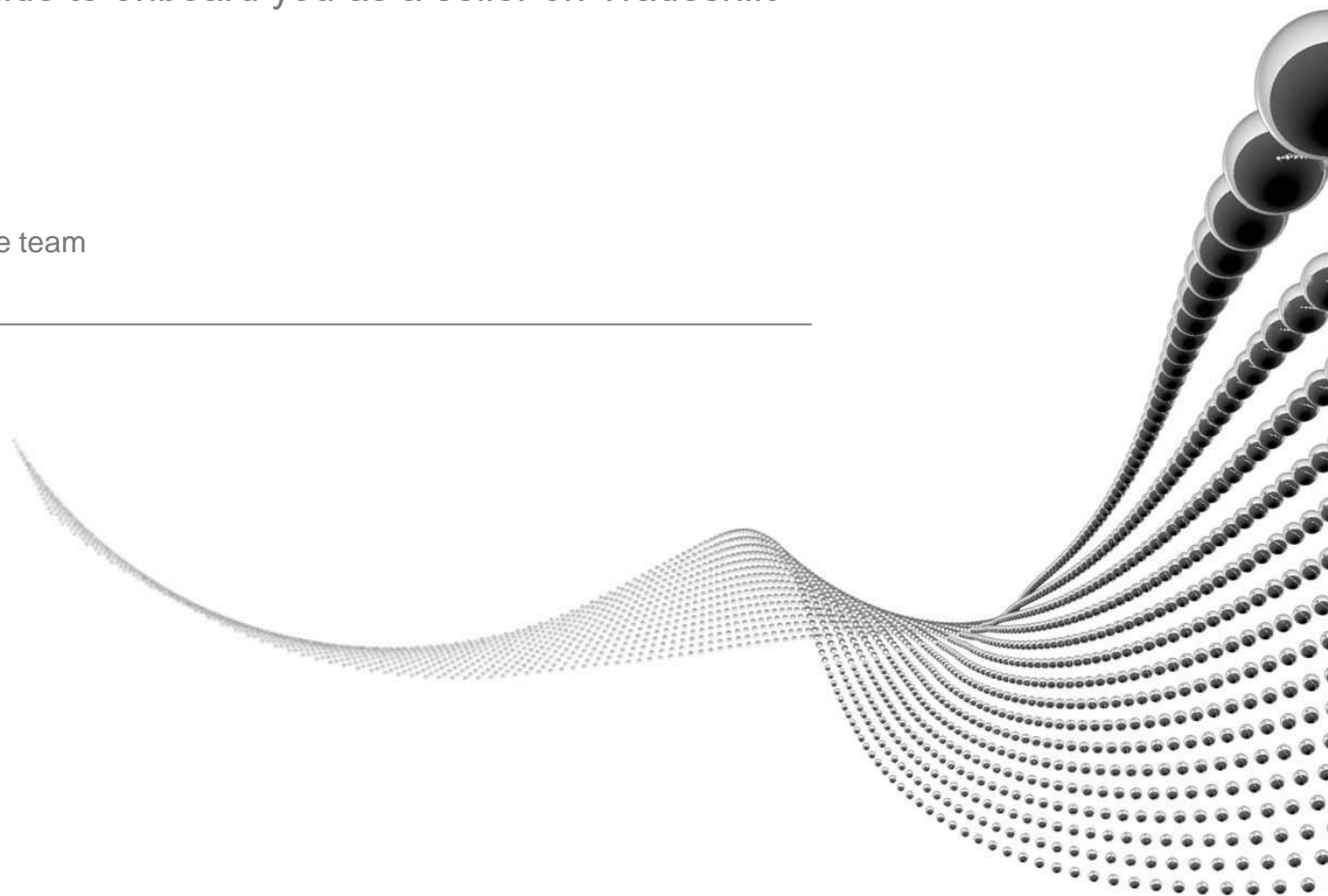


Seller Onboarding Guide

Step-by-step guide to onboard you as a seller on Tradeshift

Chain IQ Marketplace team

September 2023



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01

Understand the basics

In this section you will learn:

- Who is Tradeshift?
- Glossary of terms
- General onboarding information
- What are the Catalog onboarding steps

Who is Tradeshift?

Tradeshift – a procurement platform for online catalogs and orders

Tradeshift is an online procurement platform that enables buyers and sellers to transact digitally.



Benefits of using Tradeshift

- Makes it easy for Buyers to browse the Supplier catalogs and purchase what they need
- Hosts the catalogs and offers the Supplier the possibility to manage the content
- Supplier connects with multiple clients on one platform

Glossary of terms

Frequently used terms

Term	Definition
Buyers	<ul style="list-style-type: none">▪ The receiving company towards which you send your offer.▪ Can receive offers directly from Sellers.
Catalog Upload	<ul style="list-style-type: none">▪ A method for seller to offer products to buyer (client) via Tradeshift by uploading catalog in Tradeshift template
Offers	<ul style="list-style-type: none">▪ Customized offering directed to a specific Buyer.
Products	<ul style="list-style-type: none">▪ Generic product/service information and standard pricing.(The products/services are only visible for those who have user access on supplier side. Not visible for your Buyer.)
Product identifier:	<ul style="list-style-type: none">▪ Product identifiers are a series of numerical or alphanumeric digits that are used to identify a specific product. Ultimately, they are the key to helping customers locate products online, and commonly include Global Trade Item Numbers (GTINs), Manufacturer Part Numbers (MPNs), Stock Keeping Unit (SKU).
Sellers:	<ul style="list-style-type: none">▪ Manage product information.▪ Can share offers directly with Buyers.Can receive Purchase Orders from Buyers.
SMM - Seller Marketplace Manager App	<ul style="list-style-type: none">▪ The starting point for the journey of the seller's products to their buyers. This is where sellers upload and manage their products, as well create, manage and distribute their offers to the connected buyers.

Glossary of terms


Frequently used terms

Term	Definition
SMD – Supplier Master Data	<ul style="list-style-type: none">▪ Refers to vital information about the suppliers with whom a company works. It is a complete record of the supplier's relevant information, such as:▪ Contact information/business point of contact▪ Location▪ Legal information of the suppliers▪ The goods or products delivered by the supplier▪ Payment terms▪ Invoice volume
SKU:	<ul style="list-style-type: none">▪ A SKU (stock-keeping unit) is an alphanumeric code assigned to products and/or variants in a retailer's catalog. Each SKU in an inventory should be unique, helping to identify, track and manage all the individual variants in question.
UNSPSC Code:	<ul style="list-style-type: none">▪ The commodity codes (Version 19.0501) acceptable by Tradeshift.
Units of Measure:	<ul style="list-style-type: none">▪ UoM which are accepted by Tradeshift.

Supplier onboarding – seller effort

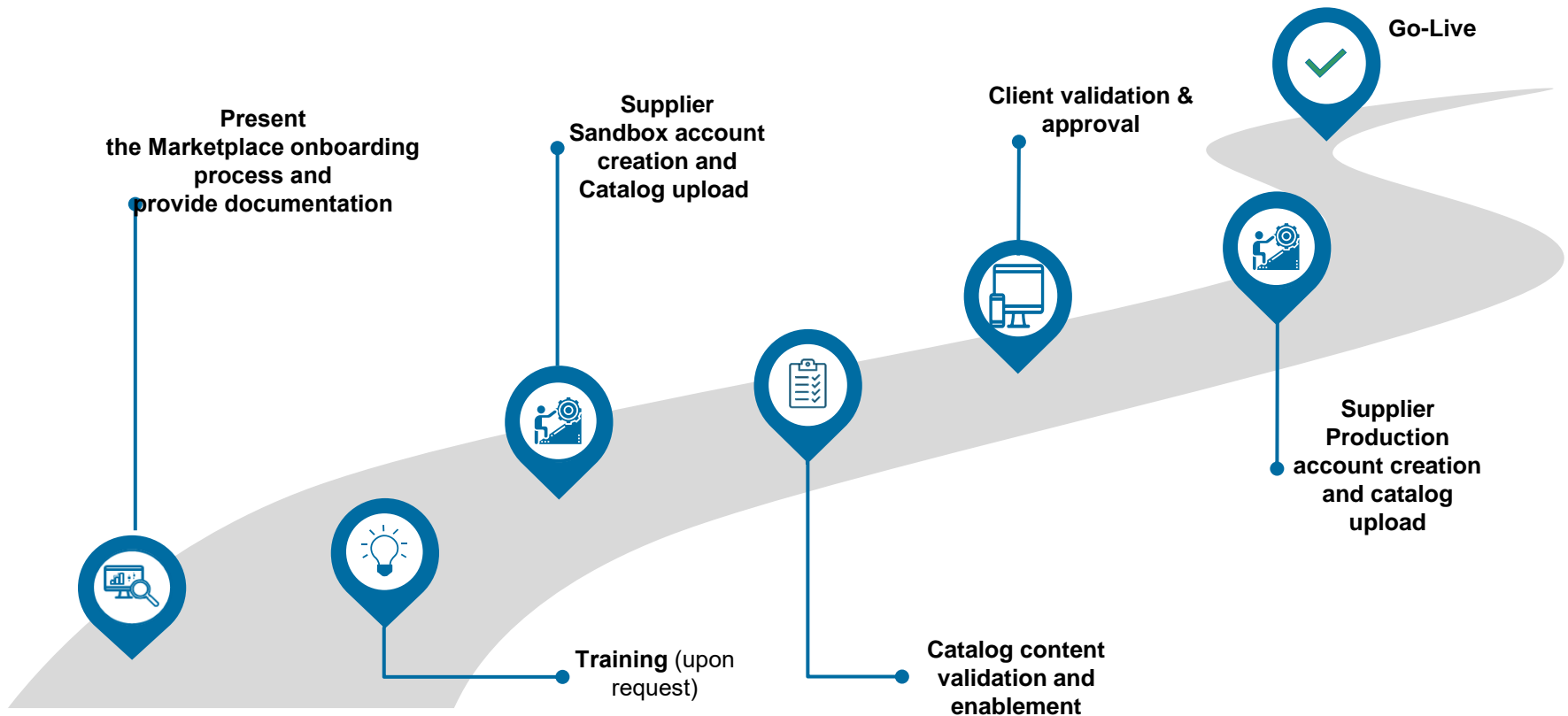
Steps and estimated effort for account creation and catalog onboarding

Task	Description	Efforts
Account creation on Tradeshift sandbox (test environment)	Receive SMD file from Chain IQ. Verify and update all fields with the company data and send it by reply	1 Hour
	Create Tradeshift sandbox (testing) account	0.2 Hours
	Accept connection with Chain IQ Marketplace	0.3 Hours
Catalog creation & correction	Receive template and documentation from Chain IQ , review and add the required product information	8 Hour
	Participate in an online training session with Chain IQ to understand how to fill and upload the template (if required)	1 Hour
Account creation on Tradeshift Production	Upload catalog data in Tradeshift sandbox (testing)	1 Hour
	Make corrections to the catalog data to align with Chain IQ's content requirements, if necessary	1 Hour
	Test the connection: do you receive POs and notifications from Tradeshift on the right email address?	1 Hour
	Access email link to create Tradeshift Production account and profile	0.5 Hours
	Accept connection with Chain IQ Marketplace	0.2 Hours
Upload catalog in Production	Upload catalog in Tradeshift Production	1 Hours
Standard onboarding efforts		15.2 Hours

 Please note that the estimated timeline for the supplier onboarding is based on an average assessment for standard catalogs including over 1000 items. The timeline for the onboarding will vary depending on your number of items.

Seller onboarding process flow

Onboarding overview



Catalog onboarding steps

How to use Tradeshift and setup your catalog on Tradeshift

1. Create your Tradeshift test account and connect with the Chain IQ Marketplace to run tests
2. Create your first catalog on Tradeshift
3. Adjust the catalog content based on the content best practices
4. Test the ordering process flow - purchase orders overview
5. Create your Tradeshift Production account
6. Connect with the client or the Chain IQ Marketplace
7. Upload the catalog file
8. Catalog is live – ready for receiving orders



Don't worry!

The Chain IQ Marketplace team will support you each step of the way.

02

Create your Tradeshift test account

In this section you will learn:

- How to create your account in the testing environment
- Main apps
- How to accept connections from clients or Chain IQ
- How to add or remove users

Create your account on Tradeshift test system

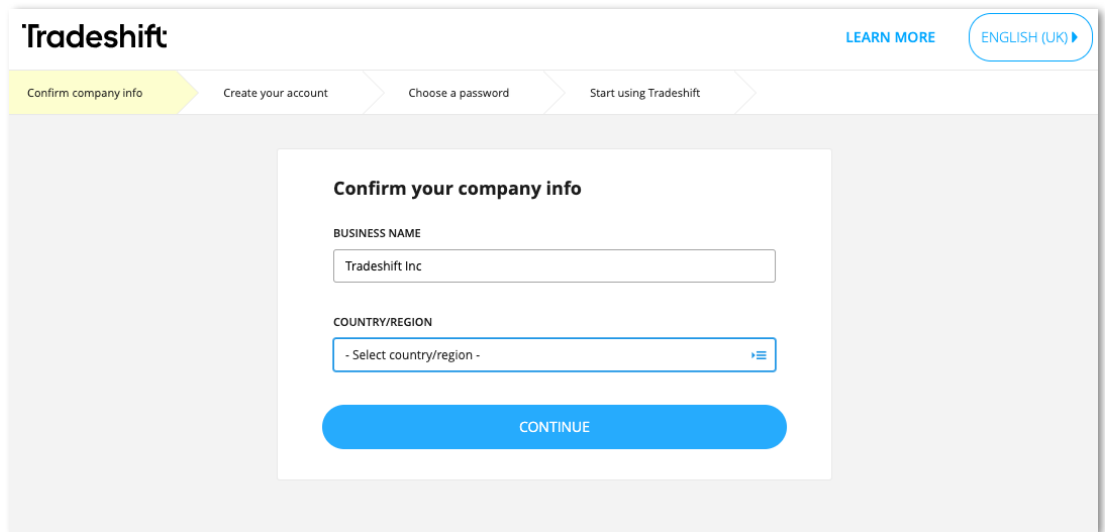
The steps for creating an account on Tradeshift

In the test account, you will learn how to manage your Tradeshift account, and how to upload your catalogs, and you will understand the ordering process.

To create a test account on Tradeshift, use the following link: <https://sandbox.tradeshift.com/register>

Complete your company information during the registration of the account:

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



The screenshot displays the Tradeshift registration interface. At the top, the Tradeshift logo is on the left, and 'LEARN MORE' and 'ENGLISH (UK)' links are on the right. A progress bar below the header shows four steps: 'Confirm company info' (highlighted in yellow), 'Create your account', 'Choose a password', and 'Start using Tradeshift'. The main content area features a white card titled 'Confirm your company info'. Inside the card, there is a 'BUSINESS NAME' field with 'Tradeshift Inc' entered, and a 'COUNTRY/REGION' dropdown menu currently showing '- Select country/region -'. A blue 'CONTINUE' button is positioned at the bottom of the card.

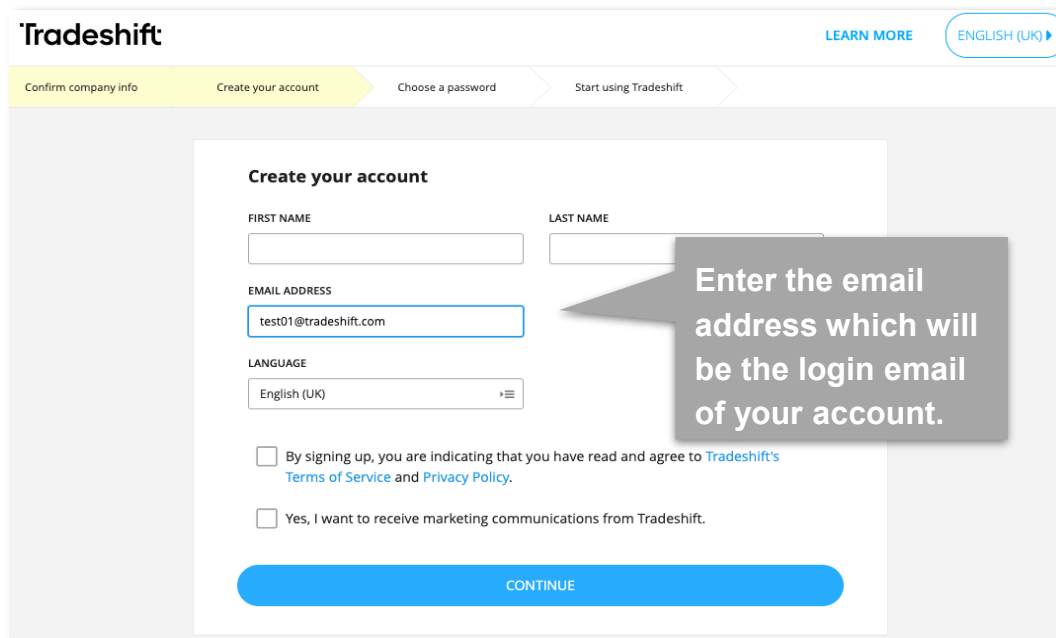
Create your account on Tradeshift test system

The steps for creating an account on Tradeshift

Next, complete your personal information and insert your 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 don't find the email in your inbox, please look in the junk and spam folders.



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 form area is titled 'Create your account' and contains the following fields: 'FIRST NAME' and 'LAST NAME' (both empty text boxes), 'EMAIL ADDRESS' (a text box containing 'test01@tradeshift.com'), and 'LANGUAGE' (a dropdown menu showing 'English (UK)'). Below these fields are two checkboxes: the first is 'By signing up, you are indicating that you have read and agree to Tradeshift's Terms of Service and Privacy Policy.' and the second is 'Yes, I want to receive marketing communications from Tradeshift.' At the bottom of the form is a large blue button labeled 'CONTINUE'. A grey speech bubble with a pointer to the email address field contains the text: 'Enter the email address which will be the login email of your account.'

⚠ The email address that you used for registration on Tradeshift will be the email of the Administrator of the account. The Administrator has full access to the platform (that includes adding team members; updating the company profile and having access to all the activities performed on the account).

Set and recover password for your test account

How to login and recover your password

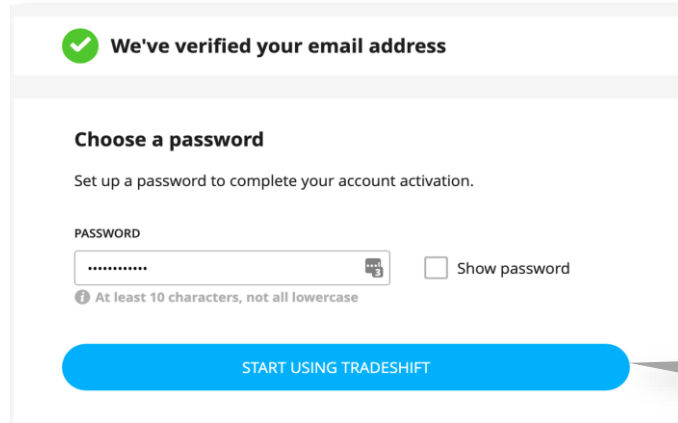
Once the email address is verified, you can create the password for your account.

Now you can **log into Tradeshift** with the **registered email address** and **password**.

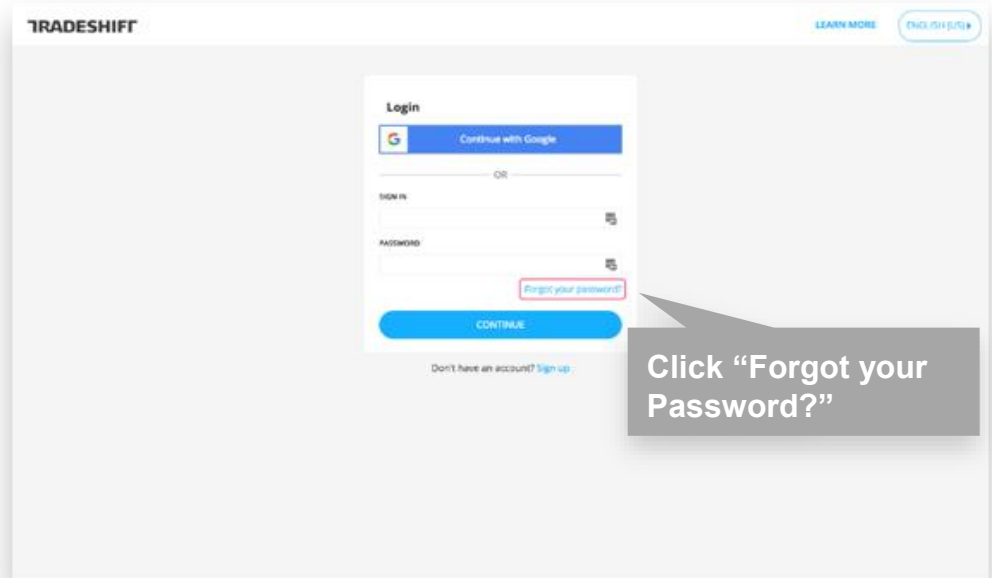
Login Page:
<https://sandbox.tradeshift.com>

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".



Click here to login



Click "Forgot your Password?"

Does your company already have a Tradeshift account?

Next steps for existing accounts

Even easier! If you have access to your Tradeshift company account, the next step is to connect with your client and/or the Chain IQ Marketplace. You can accept the connection request under the “Network” App.

If you don't have access to your Tradeshift company account, ask the Company Admin who has access, to add you as a user from the '**Profile**' App.

If there is no option to get access to your Tradeshift company account, you can reach out to the **Marketplace team** at marketplace@chainiq.com.

The screenshot displays the Tradeshift 'Company Profile' app interface. The sidebar on the left contains navigation options: Create, Messages, Document Manager, Task Manager, Users, Tradeshift Knowledge Base, Profile (highlighted), Network, Seller Marketplace Manager, and All apps. The main content area is titled 'Company Profile' and shows a 'Complete your profile' form. The form includes fields for Company Name, Website, Industry, Company Ownership, Company Address, Phone, Company Description, Company Size, Share Capital, Registration Address, and Company Email Address. A 'Profile strength 10%' indicator is visible. A red arrow points from the 'Profile' app icon in the sidebar to the 'Complete your profile' form. On the right side of the form, there is a 'Manage team' panel with a search bar, a list of users, and buttons for 'ADD USER' and 'CLOSE'. A 'DONE' button is located at the bottom right of the form.

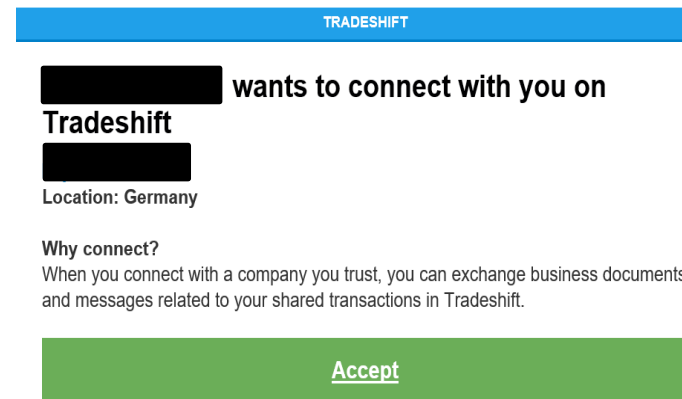
Connection with a buyer test account

The steps for connecting with your client or the Chain IQ Marketplace

- After you have created your company account or if you have an existing account, the next step is to connect with your client and/or the Chain IQ Marketplace, so that you can send offers.
- By connecting to your client and/or the Chain IQ Marketplace, you will be able to send offers to the desired client or to the marketplace.

To accept the connection request:

- You will receive an email notification from Tradeshift (**notifications@sandbox.tradeshift.com**) to connect to your client/ Chain IQ Marketplace (see also spam folder). Click the **"Accept"** button from the email.



Connection with a buyer test account

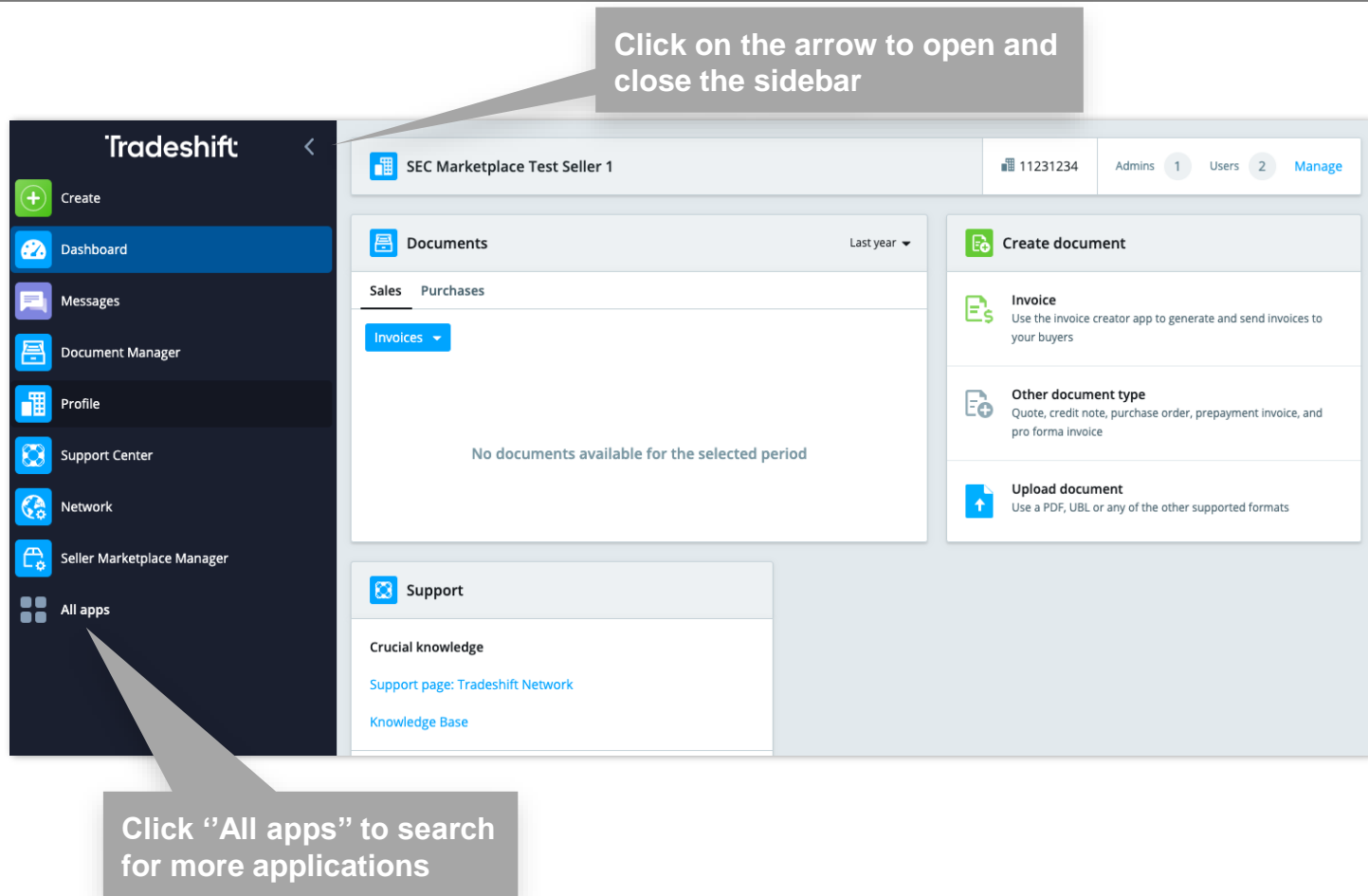
The steps for connecting with your client or the Chain IQ Marketplace

- If you are already logged into Tradeshift, you will be redirected to the **"Network" app** (1) .
- If you are not logged in: After login, from the Menu located on the left side of the page, go to **'Network'** (1)
- Go to tab **'Tradeshift Network'** (2) and click on the button **"Invitations received"** (3) located in the top right-hand of the page
- Your pending network connection will be displayed. Click **"Accept"** (4) to accept the connection request/s from your customer/s and/or Marketplace.



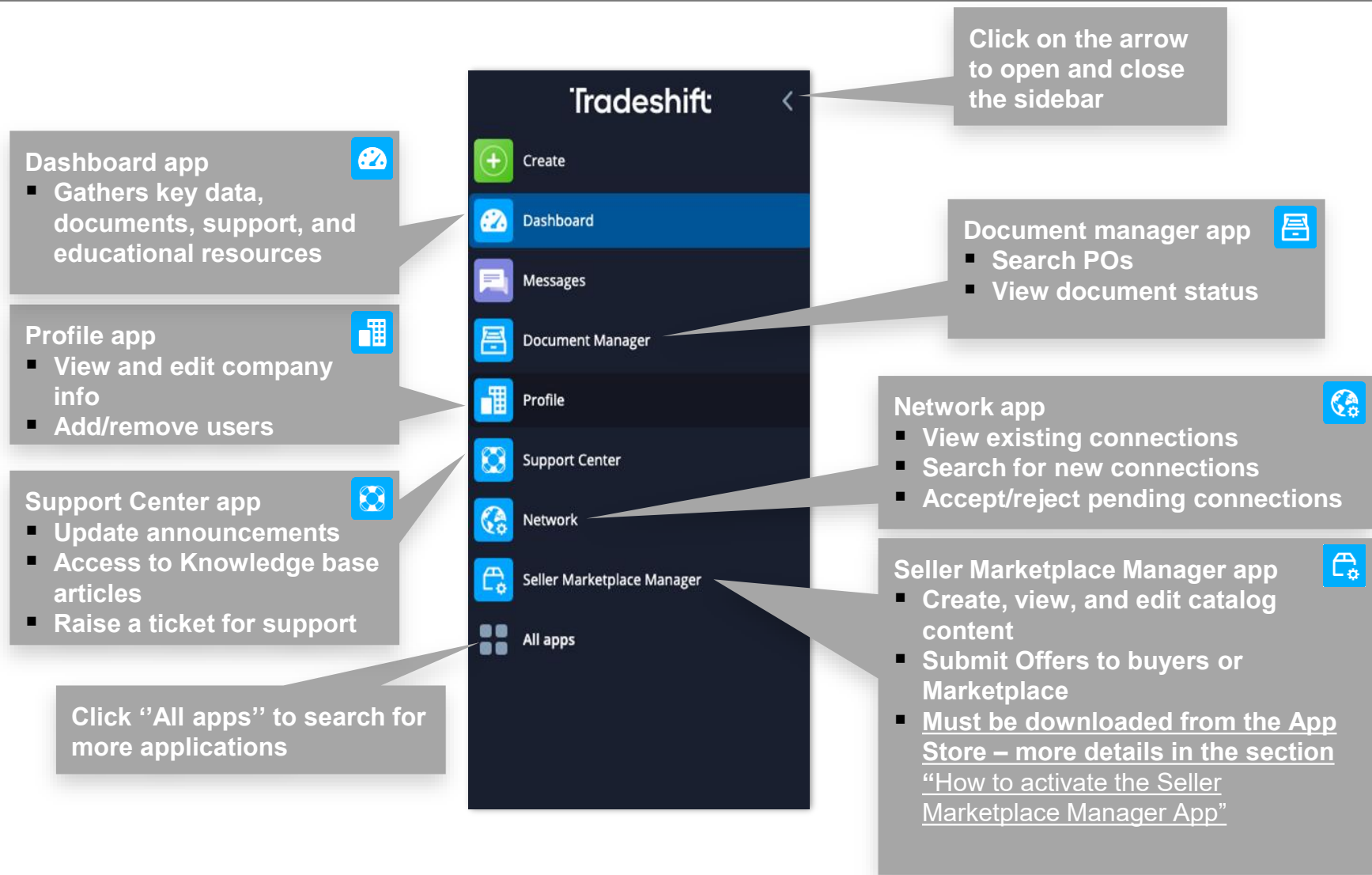
How to work with Tradeshift apps

Using Tradeshift apps



How to work with Tradeshift apps

Most common Tradeshift apps



Additional apps

Most common Tradeshift apps



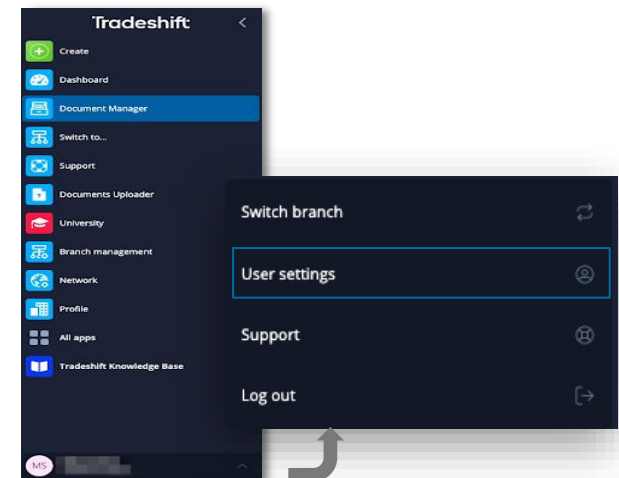
Tradeshift University

- Only available in the live environment (not in Sandbox)
- Search for more how-to and learning guides and browse for new courses
- Only available to logged in users
- Course: Upload products via File Upload
- Course: Seller Marketplace Manager - Creating an Offer



User settings

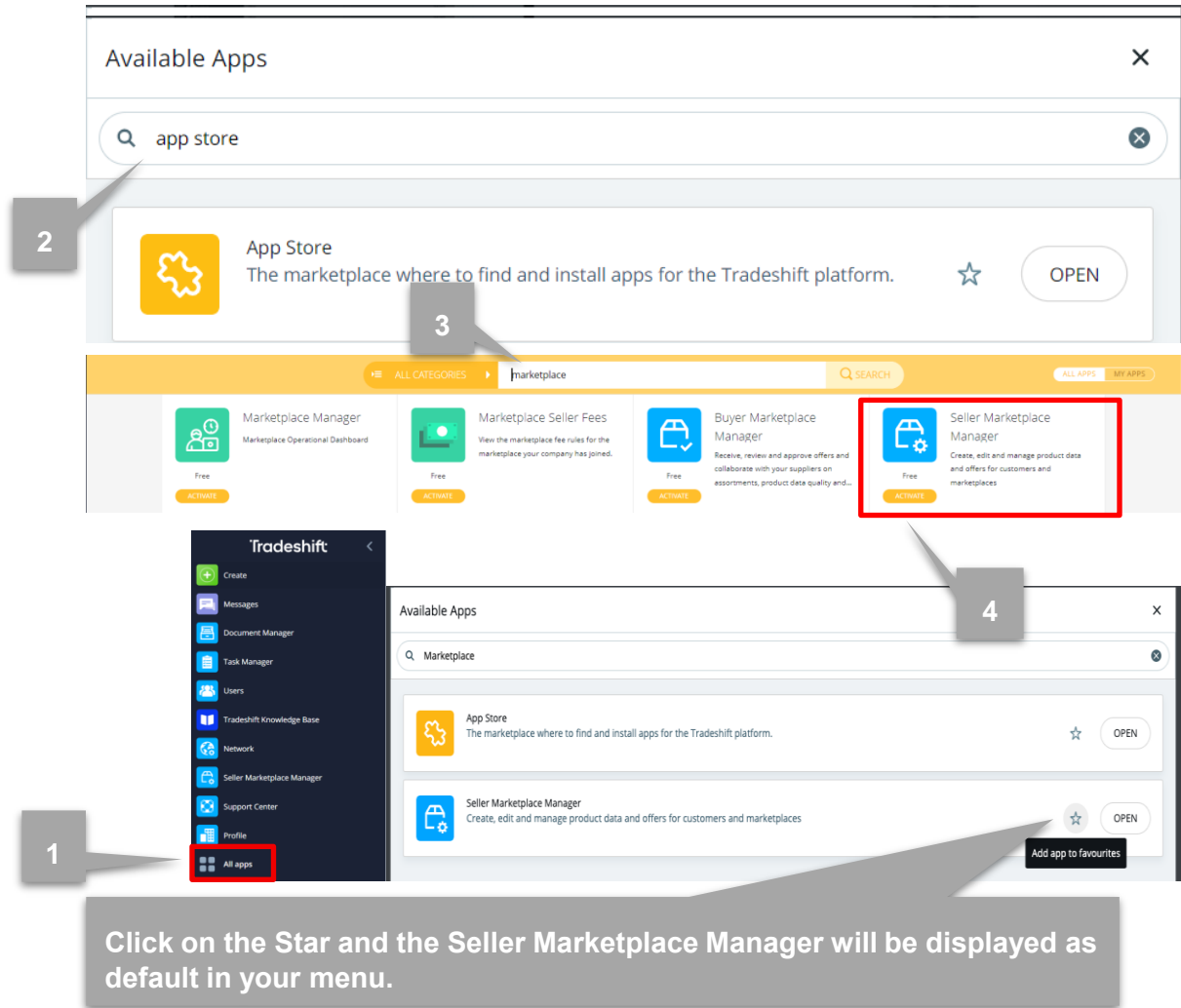
- Edit User Settings: First Name, Last Name, Login Email, Password, Language, Notifications
- Notification setting



How to activate the Seller Marketplace Manager App

How to upload your products using the Seller Marketplace Manager App

- From the Sidebar Menu, access “All apps” (1) and type in “App Store” (2) > then click on the “App Store”
- Search for “**Marketplace**” (3)
- Activate the Seller Marketplace Manager App (4)
- For easy access, you can add the Seller Marketplace Manager app as a favorite on the Sidebar.
- Click on “All apps” and search for Seller Marketplace Manager.
- Click on the Star and the Seller Marketplace Manager will be displayed as default in your menu.
- Seller Marketplace Manager App is now added on the Sidebar Menu and can be found under “All apps”.



How to add users to your Tradeshift company account

Adding additional users on Tradeshift

The account administrator can add more team members as users on their Tradeshift account.
To add more users:

Once logged in to your account, access the **Profile app**, which will take you to your company's profile page.

1. Click the **“Invite team member” (1)** button from the **Complete your profile** section to start adding new team members to your company account. Another page will open where you can fill in the details of the new user.

The screenshot displays the 'Company Profile' page. On the left, a sidebar contains a profile picture placeholder with an 'Add Logo' button, a 'Your Website' field, and an 'ABOUT' section with links for '5 Connections', 'Industry', '1 employee (just me)', 'Ownership', and 'Bucharest, RO'. The main content area is titled 'Complete your profile' and includes a 'Profile strength 20%' indicator. Below this, there are several input fields: 'COMPANY NAME' (Geonea Andreea Supplier), 'WEBSITE', 'INDUSTRY', 'COMPANY OWNERSHIP', 'COMPANY ADDRESS' (Bucharest, RO), 'PHONE', 'COMPANY DESCRIPTION' (The greatest company in the world! You can resort to u...), 'COMPANY SIZE' (1 employee (just me)), 'SHARE CAPITAL' (Select), 'REGISTRATION ADDRESS' (Select), and 'COMPANY EMAIL ADDRESS'. At the bottom of the form, there is an 'INVITE TEAM MEMBER' button, which is highlighted with a grey box and a callout bubble containing the number '1'. A blue 'DONE' button is located at the bottom right of the form.

How to add users to your Tradeshift company account

Adding additional users on Tradeshift

2. The fields „**Email**” and „**Role**” are mandatory fields.
[Visit this article](#) to learn more about the user roles available on Tradeshift.
For instance, you can choose the **Accounts Payable** role, which enables a user to work with documents and company connections. Finally, you can also choose if this team member is displayed on your company account's profile page.
3. When you're done adding the details, click **Add User (3)**. The user will receive an invitation email from Tradeshift in the language of your choice. Click on the **link**, set a password and the user will be added to the account.

After you have added a new user, you can enable order notifications for the additional user. Activating order notifications for a different user will allow the user to receive order notifications from Tradeshift and accept/reject the order via Tradeshift.

Refer to section 6. **Manage your documents – "How you receive purchase orders"** for more details on how to enable order notifications for a different user.


The screenshot shows the 'Add user' form in Tradeshift. The form has a title bar 'Add user' with a close button 'X'. The fields are: EMAIL * (john.smith@mycompany.com), FIRST NAME (John), LAST NAME (Smith), TITLE (Accounts Payable Manager), ROLE (Accounts payable), INVITATION LANGUAGE (English - US), and SHOW ON COMPANY PROFILE? (checked). A blue 'ADD USER' button is at the bottom. Two numbered callouts are present: '2' points to the ROLE field, and '3' points to the 'ADD USER' button.

Field	Value
EMAIL *	john.smith@mycompany.com
FIRST NAME	John
LAST NAME	Smith
TITLE	Accounts Payable Manager
ROLE	Accounts payable
INVITATION LANGUAGE	English - US
SHOW ON COMPANY PROFILE?	<input checked="" type="checkbox"/> Yes, show on company profile
Button	ADD USER

How to remove users from your Tradeshift company account

Removing users from Tradeshift

1. Once logged in to your account, access your company's profile page by clicking the [Profile icon](#) from the left-hand side menu.
2. When the Profile app is opened, scroll down to the **Team** section
3. Click the **Edit** button from the **Team** section to find and remove a team member from your company account.
4. Use the Search functionality to search and find the desired team member.
5. Once found, click on their name to open their profile in a side menu.
6. Scroll down to find and click the **Remove** button to remove the user.

 **Note:** If a team member was removed, you will not be able to re-activate the user account.

Team

[EDIT](#)

FIRST NAME

John

LAST NAME

Smith

TITLE

Manager

ROLE

Accounts payable manager

SHOW ON COMPANY PROFILE?

☐ Yes, show on company profile

SAVE

REMOVE

03

Create your first catalog on Tradeshift

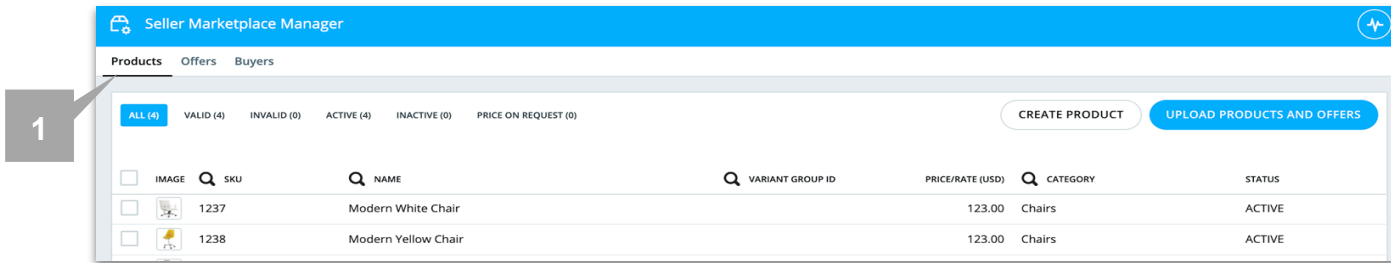
In this section you will learn:

- What are products & offers
- Upload modes
- How to create and upload your catalog using the Tradeshift catalog template
- How to map your taxonomy to the Chain IQ taxonomy

What are Products and Offers

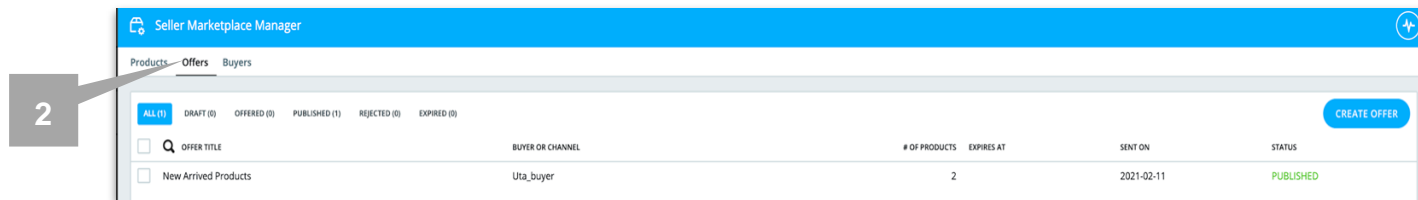
How to work with products and offers

Products: Generic product/service information and standard pricing. (The products/services are only visible for those who have user access on the supplier side. Not visible for your Buyer.)



Offers: Customized offering directed to a specific Buyer.

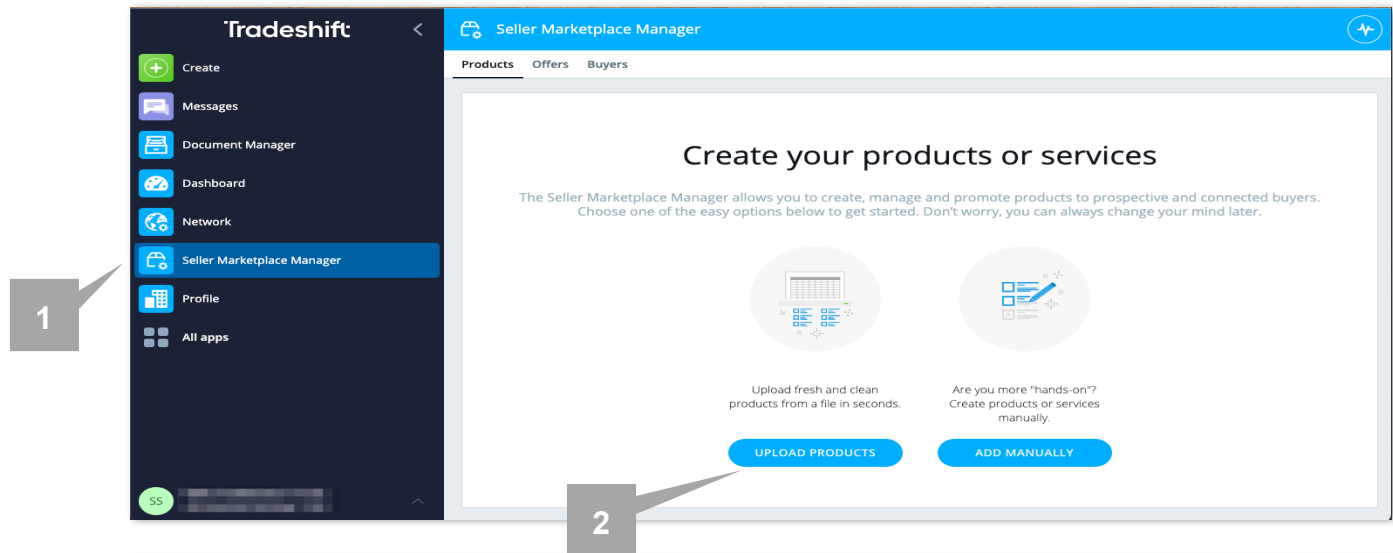
Buyer: The receiving company towards which you send your offer. The receiving company can be either Chain IQ Marketplace or your direct customer.



Product catalog template

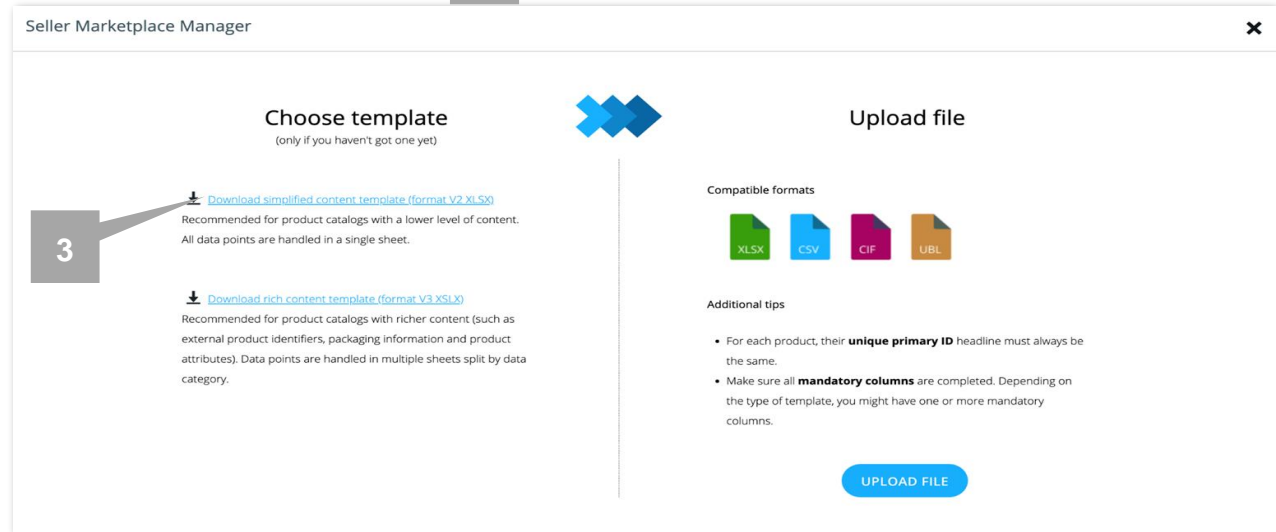
How to work with Tradeshift catalog template

1. Access the Seller Marketplace Manager app
2. Click on Upload products
3. Download Content Template (Catalog Template)



⚠ Important:

We suggest sellers to download and utilize the **V2 simplified content template**, which is a standard template with complete functionalities. Tradeshift is currently updating and improving the V3 rich content template.



Tradeshift catalog template explained

How to work with Tradeshift catalog template

Header level

- You can choose the Upload Mode

Content Upload

- This is where you fill in your product information

Tradeshift									
1									
2									
3	Upload Mode	UPDATE PRODUCTS	MANDATORY						
4	Offer Title		MANDATORY This title needs to be unique among the available offers in Tradeshift						
5	Message		OPTIONAL						
6	Receiver Name		MANDATORY Name of the receiving company (Offer modes only) case sensitive MANDATORY						
7	Valid from		OPTIONAL Format: YYYY-MM-DD						
8	Expires at		OPTIONAL Format: YYYY-MM-DD						
9	Country		OPTIONAL Enter the country code of your target markets, if several codes are to be entered, then separate them by comma.						
10	US State		OPTIONAL Enter the US state code, if several codes are to be entered, then separate them by comma						
11									
12									
13	Mandatory	Mandatory	Mandatory	Mandatory	Optional	Mandatory	Optional	Optional	Optional
14	SKU	Language	Name	Description	Unit of Measure	Category	Keywords	Lead Time (days)	Image1
15									
16									
17									
18									
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27									
28									

Required fields per Upload Mode

- Based on the upload mode, the fields are either mandatory or optional.

Upload: The section where you fill in your product information

General Instructions about how to use the template: Instructions and information about the template

Attributes tab: Here you can find a brief explanation on how to fill in each field

Code Lists: Here you will find supported UOM codes, certificates and languages code

Example and Quality Tips: Some examples showing how the product information should be filled in

Importing Products via Catalog Template – Catalog creation

How to work with Tradeshift catalog template

There are 5 different ways you can upload your content (based on the Upload Mode):

1. UPDATE PRODUCTS

- Add or update list of available Products. This mode is not connected to any offer and thus DO NOT need to provide the Offer Title.
- An offer needs to be submitted separately via Seller Marketplace Manager app once the products are uploaded.

2. ADD NEW OFFER**

- Create a new offer
- New products will be created, where new offer items will be added
- Changes to existing offer items will be updated

3. UPDATE OFFER**

- Updates an existing offer
- New products will be created, where new offer items will be added
- Changes to existing offer items will be updated, missed offer items will be kept

4. REPLACE OFFER**

- Like UPDATE OFFER, but offer items which are not included will be deleted

5. DELETE OFFER**

- An offer identified by the Offer Title will be withdrawn - Offer and Offer items are deleted

The screenshot shows the Tradeshift upload form with the following fields and requirements:

Field	Requirement
Upload Mode	MANDATORY
Offer Title	MANDATORY This title needs to be unique among the available offers in Tradeshift
Message	OPTIONAL
Receiver Name	MANDATORY Name of the receiving company (Offer modes only) case sensitive MANDATORY
Valid from	OPTIONAL Format: YYYY-MM-DD
Expires at	OPTIONAL Format: YYYY-MM-DD
Country	OPTIONAL Enter the country code of your target markets, if several codes are to be entered, then separate them by comma.
US State	OPTIONAL Enter the US state code, if several codes are to be entered, then separate them by comma.

**Offer title and Receiver Name are mandatory when uploading a file using the "Offer" upload modes.

Offer Title: The name of the Offer

Receiver name: Enter the name of the receiving company ie. Chain IQ Marketplace or client's company (case sensitive)

In the upcoming slides, you will find a more detailed explanation of the different upload modes.

Importing Products via Catalog template - Catalog creation

Upload mode: UPDATE PRODUCTS

This mode is not connected to any offer and no offer Title should be provided.

- **Column A:** Select a relevant ID for your product number (e.g. SKU).
- Insert all the mandatory information highlighted in red.
- Content quality is important - description should therefore provide relevant information.
- **Column F:** Category refers to the UNSPSC commodity code. The commodity codes used by Tradeshift are from UNSPSC version 19.0501.
- **The Units of Measure** supported can be found under the Code Lists tab. If the field is left empty, EA will be taken as the default UoM automatically.
- Even though not mandatory - Keywords are helpful to ensure the visibility of your product when the client is searching for a specific item. Words included in the name and description are already considered keywords.
- **Images of the products** must be provided in URLs that are publicly accessible.

Mandatory	Mandatory	Mandatory	Mandatory	Optional	Mandatory	Optional	Optional	Optional
SKU	Language	Name	Description	Unit of Measure	Category	Keywords	Lead Time (days)	Image1
1237	en	Modern White Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/j3vknwh7gfgg3uyceof.jpg
1247	en	Modern Black Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/zeurkrowdlddyutmojpf.jpg
1238	en	Modern Yellow Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/chyoursrmyvixme0lou.jpg
1248	en	Modern Brown Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/hcilekqns8qoy57ppo.jpg

Importing Products via Catalog template - Catalog creation

Price breaks

You can offer discounts by utilizing the Price Break columns. There are two (2) different Price Break types (based on Quantity):

- a) **Volume:** Depending on the selected quantity, the price changes for all ordered items.
 - b) **Tiered:** There are different prices applied to specific quantity, the price change is based on tiering.
- **Price Break1'** defines the initial price for the first price break quantity. If ordering up to a certain amount of items, the initial price applies. In this case 'Price Break1' should be the initial price. 'Price Break Quantity1' should always be zero. The initial price applies up to 'Price Break Quantity2'. The buyer will be allowed to order at least the minimum order quantity defined.
 - **'Price Break2'** and above define the price per item if ordering above a defined quantity. The price per item will change (differ from initial price).
 - If there is a minimum quantity applies for ordering, you can add it under the column **'Min Order Quantity'**.
 - **Sellers can add up to 15 price breaks** by simply adding new columns to the file with the correct column name, ie. Price Break6, Price Break Quantity6; Price Break7, Price Break Quantity7 etc.

T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE
Optional	Optional	Optional	Optional	Optional	Optional	Optional	Optional	Optional	Optional	Optional	Optional
Price	Currency	Base Quantity	Min Order Quantity	Lot Size	Price Break Type	Price Break1	Price Break Quantity1	Price Break2	Price Break Quantity2	Price Break3	Price Break Quantity3
123.00	USD	1.00	1.000		TIERED	123.00	0.000	120.00	10	110.00	30
123.00	USD	1.00	1.000		TIERED	123.00	0.000	120.00	10	110.00	30
123.00	USD	1.00	1.000		TIERED	123.00	0.000	120.00	10	110.00	30
123.00	USD	1.00	1.000		TIERED	123.00	0.000	120.00	10	110.00	30

Importing Products via Catalog template - Catalog creation

Slice and dice your content based on Ship From and Delivery Terms information

Delivery Terms help your customers:

- Stay informed about which party – customer or seller – is responsible for organizing and paying for transportation, customs clearance, associated paperwork and factor this into the decision-making process for the purchase
- Perform granular searches within the entire Shop Product database by using Delivery Terms as a standalone filter or combined with existing ones

Ship from details help your customers:

- Navigate content with focus on products that can be shipped from a particular location (i.e. closer to your location)
- Make informed buying decisions factoring in potential transportation costs and delivery time
- Pre-calculate taxes on Purchase Requests /Purchase Orders and decide if the total price is agreeable

How to add Delivery Terms information to your catalog

- To add Delivery Terms, simply specify Delivery Terms applicable in the field "Delivery Terms" from the catalog template, namely the 3 Digit code inco terms (e.g. EXW, DDP, FOB etc).

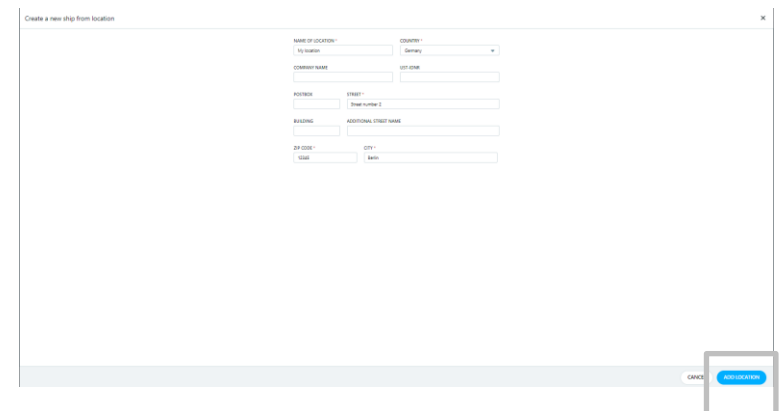
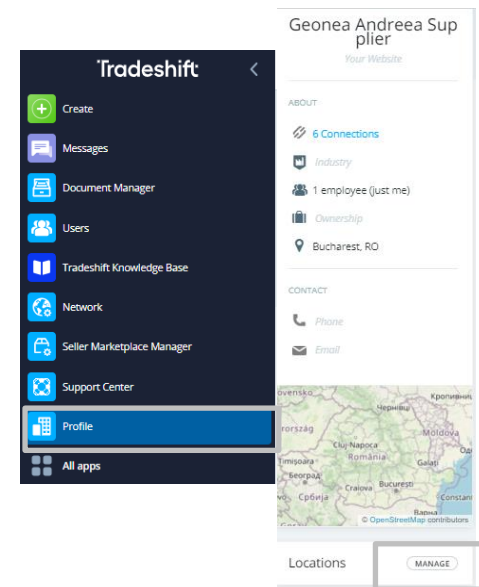
Importing Products via Catalog template - Catalog creation

Slice and dice your content based on Ship From and Delivery Terms information

How to add Ship From information to your catalog

To add Ship From information, proceed as it follows:

- Go to the Profile app from the left side panel
- On the Profile app, scroll down to "Locations"
- Click on "Manage"
- Then click on "Add new location" in the upper right side of the page
- Choose "Ship from"
- Fill in all mandatory fields: Name of location, Country, Street, City, Zip Code
- Then click on the button "Add location" in the lower corner of the page
- Your location has now been created in the Profile of your company
- To add the recently created location to your catalog, fill in the Ship From field from the template with the name you have provided to your location in the Profile app



Importing Products via Catalog Template – Offer creation

Upload mode: ADD NEW OFFER

Create a new offer where new offer items will be added.

- **Offer Title and Receiver Name are Mandatory.**
- **Message (optional):** will be visible in the notification sent to the Marketplace.
- **Receiver Name:** This field is case sensitive, make sure to check the Receiver Name (ie. Marketplace name) via the Network application or ask Marketplace team to provide you with the name of the client/Marketplace from the Network app.
- The **offer validity date** is optional.

SKU	Language	Name	Description	Unit of Measure	Category	Keywords	Lead Time (days)	Image1
1237	en	Modern White Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/ibvkeh7g/fgp3vypool.jpg
1247	en	Modern Black Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/aurkwoh/0dyuimopj.jpg
1238	en	Modern Yellow Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/ckp3pags/6qpyiv9poo.jpg
1248	en	Modern Brown Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/ckp3pags/6qpyiv9poo.jpg

- If you decide to add an expiration date to your offer, the offer will be removed and deleted on that date. **We do not recommend an expiration date unless you have seasonal offers.** This feature can be used for seasonal offers so that they are removed from the platform when they expire.
- If you decide on adding a **target market**, please add the codes under the Country field. For US, please add the states as well.
- You can use the upload mode “**ADD NEW OFFER**” to directly upload your first catalog on Tradeshift. If you use “**ADD NEW OFFER**” for your first catalog upload, fill out all mandatory fields from the mode “**UPDATE PRODUCTS**”.

⚠ You can upload more than one offer on Tradeshift if you offer different types of products in each offer. E.g. You are selling different products to different countries, or you are selling both seasonal products and non-seasonal products. In these examples, you can upload different offers.

⚠ “Do not use” columns: If the products have already been uploaded to your product portfolio (visible only for you as a seller), you do not need to fill in all information, just to insert the product number.

Upload mode: ADD NEW OFFER

Overview of an offer upload

New offer 2021-02-19 DRAFT

RECEIVER
Uta_buyer
CITY, SWEDEN
100-249 EMPLOYEES
Connected

MESSAGE
Please find our new offer attached

VALID FROM
February 19, 2021

EXPIRES AT
Not set

Products in this offer
4 products

TARGET MARKETS
Europe: Austria, Switzerland, Germany

BACK DELETE OFFER SEND

Tradeshift

Upload Mode	ADD NEW OFFER	MANDATORY
Offer Title	New offer 2021-02-19	MANDATORY This title needs to be unique among the available offers in Tradeshift
Message	Please find our new offer attached	OPTIONAL
Receiver Name	Uta_buyer	MANDATORY Name of the receiving company (Offer modes only) case sensitive MANDATORY
Valid from	2021-02-19	OPTIONAL Format: YYYY-MM-DD
Expires at		OPTIONAL Format: YYYY-MM-DD
Country	CH, DE, AT	OPTIONAL Enter the country code of your target markets, if several codes are to be entered
US State		OPTIONAL Enter the US state code, if several codes are to be entered, then separate them by a comma

Mandatory	Do not use	Do not use	Do not use
SKU	Language	Name	Description
1237	en	Modern White Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.
1247	en	Modern Black Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.
1238	en	Modern Yellow Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.
1248	en	Modern Brown Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.

Upload General instructions about the Attributes Code Lists Example a

When to use “UPDATE OFFER” mode

This upload mode will be used when you want to update your current offer (your catalog).

- **It cannot be used** to create a new offer.
- New products will be created and added to the product master portfolio ("Products" tab).
- New offer items will be added, changes to existing offer items will be updated and missed offer items will be kept.
- This upload mode **must not be used to delete existing items**. "REPLACE OFFER" mode can be used for deleting existing items from the catalog.

⚠ Offer Title and Receiver Name are Mandatory.

[illegible]

Upload mode: UPDATE OFFER

Overview of an offer update

- The new message will be visible to your Buyer (1).
- The products not added to the offer update will be kept.
- For new products added to the updated Offer, they will be under 'awaiting acceptance' (2) status where approval from the Chain IQ Marketplace Team is required.
- By clicking on "Products Offered" (3) you can see all the products included in the offer (including the price changes if applicable). **The product 'Price' and 'Offered Price' (4) can be maintained separately.**

The screenshot shows a 'New offer 2021-02-19' form. Callout 1 points to a 'PUBLISHED' button and a message field containing 'Please find the changes to our offer from Feb. 19'. Callout 2 points to a 'Products in this offer' section with a sub-section 'awaiting acceptance' containing a minus sign. Callout 3 points to a 'products offered' row with a value of 5. Callout 4 points to a 'PRICE ON REQUEST' column in a table below.

PRODUCTS IN THIS OFFER	PRICE/RATE (RON)	OFFERED PRICE/RATE (RON)	PRICE ON REQUEST
products offered	5		
awaiting acceptance	—		
published products	4		
rejected products	—		
requested price changes	—		

PRICE/RATE (RON)	OFFERED PRICE/RATE (RON)	PRICE ON REQUEST
123.00 (USD)	123.00 (USD)	
123.00 (USD)	123.00 (USD)	
123.00 (USD)	123.00 (USD)	
123.00 (USD)	123.00 (USD)	
123.00 (USD)	125.00 (USD)	

TOTAL (5)									
TO BE SENT (1) PENDING (2) PUBLISHED (4) REJECTED (3) REQUESTED PRICE CHANGES (5) PRICE ON REQUEST (5)									
IMAGE	SKU	NAME	VARIANT GROUP ID	CATEGORY	PRICE/RATE (RON)	OFFERED PRICE/RATE (RON)	PRICE ON REQUEST		
	1238	Modern Yellow Chair		Chairs	123.00 (USD)	123.00 (USD)			
	1248	Modern Brown Chair		Chairs	123.00 (USD)	123.00 (USD)			
	1250	Modern Pink Chair		Chairs	123.00 (USD)	123.00 (USD)			
	1247	Modern Black Chair		Chairs	123.00 (USD)	123.00 (USD)			
	1237	Modern White Chair		Chairs	123.00 (USD)	125.00 (USD)			

Upload Mode: REPLACE OFFER

When to use "Replace offer" mode

- Like UPDATE OFFER upload mode with the difference that the offer items that are not included in your catalog will be deleted.
- **Cannot be used** to create a new offer.
- New products will be created to the product master info.
- New offer items will be added, changes to existing offer items will be updated and missed offer items will be deleted.

The screenshot shows the Tradeshift upload interface. At the top, there's a blue header with the 'Tradeshift' logo. Below it, a form is displayed with the 'Upload Mode' set to 'REPLACE OFFER'. The form includes fields for 'Offer Title', 'Message', 'Receiver Name', 'Valid from', 'Expires at', 'Country', and 'US State'. Below the form, there's a table with columns: 'SKU', 'Language', 'Name', 'Description', 'Unit of Measure', 'Category', 'Keywords', 'Lead Time (days)', and 'Image1'. The table contains four rows of data for different office chairs.

SKU	Language	Name	Description	Unit of Measure	Category	Keywords	Lead Time (days)	Image1
1250	en	Modern Pink Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/teurkowdsk6qny5y7pgo.jpg
1237	en	Modern White Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/j3vkw7gfeq3uyceef.jpg
1247	en	Modern Black Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/teurkowdsk6qny5y7pgo.jpg
1251	en	Modern Beige Chair	The Modern Office Chair offers unique design and comfort all in one package, making it a must-have for your contemporary office. Modern Office Chair looks great in the modern office or home based workstation. This contemporary chair is perfect for any office environment.	EA	56101504	furniture, business, back, sit,	1	http://res.cloudinary.com/tradeshift-test/image/upload/v1491317752/teurkowdsk6qny5y7pgo.jpg

⚠ Offer Title and Receiver Name are Mandatory.

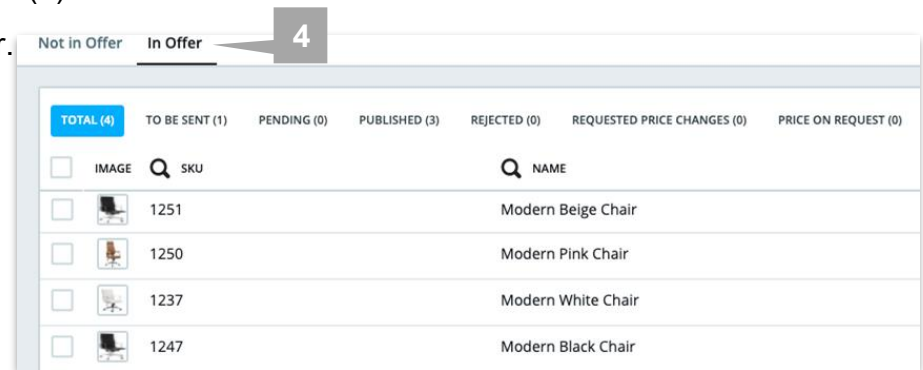
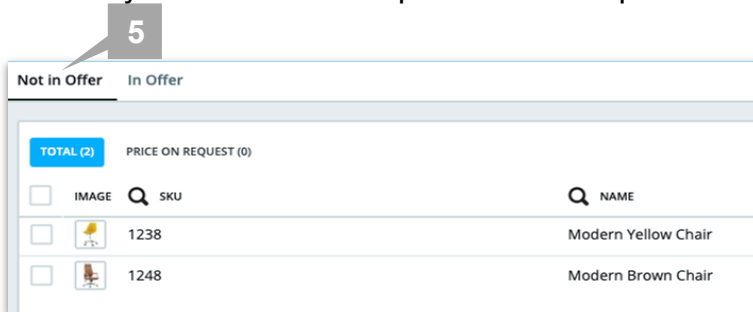
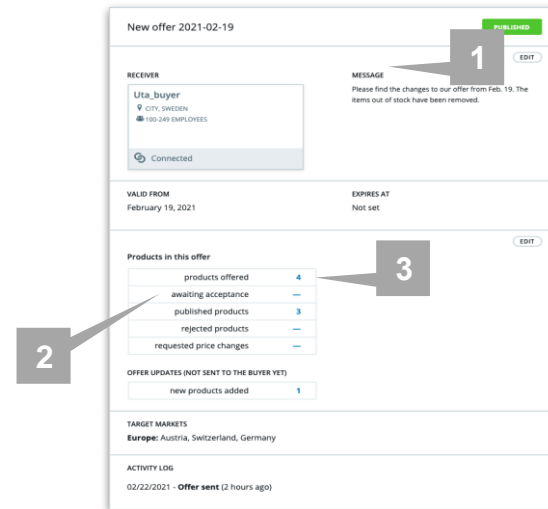
Upload Mode: REPLACE OFFER

Overview of an offer replacement

- The new message will be visible to your Buyer (1)
The products that are not added in the offer update, are deleted.
- For new products added to the updated Offer, they will be under 'awaiting acceptance' (2) status where approval from the Chain IQ Marketplace Team is required.
- By clicking on "Products Offered" (3) -> You will see all the products included in the offer in the "In Offer" (4) tab (including the price changes if applicable).

The product 'Price' and 'Offered Price' can be maintained separately.

- By clicking on "Products Offered" - Not In Offer Tab (5) you can see all the products aren't part of the offer.



When to use "DELETE OFFER" mode

- ⚠ Offer Title and Receiver Name are Mandatory.**

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September 2023

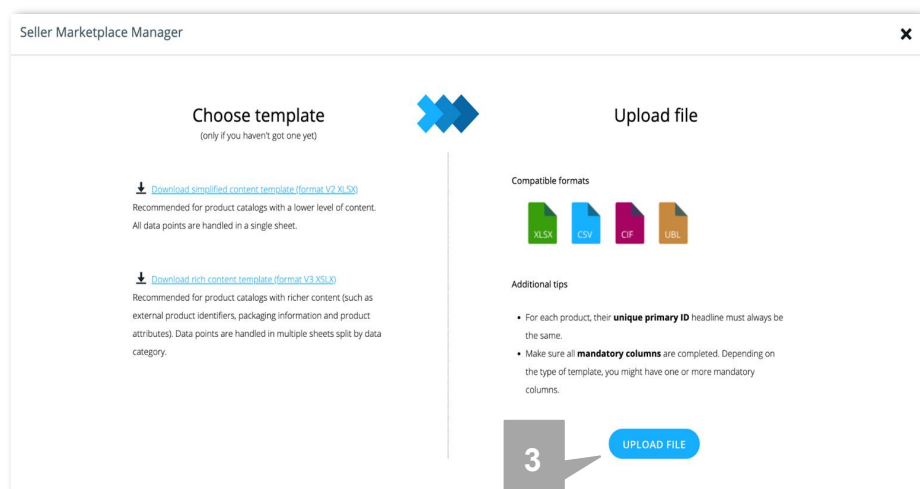
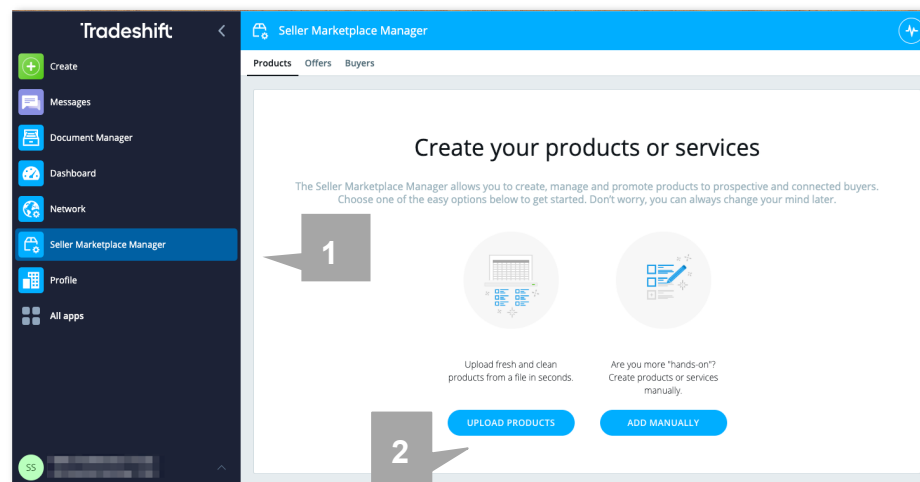
How to upload your product catalog by adding a new offer

Steps for catalog upload

1. From the Catalog Upload File, you must select the Upload mode, which will be “Add new offer”. To see more details about how to work with the upload mode “ADD NEW OFFER”, visit the section “Importing Products via Catalog Template – Offer creation”. Once you have finished filling in the product details, go to the **Seller Marketplace Manager** app.

⚠ Take into consideration to firstly activate the App according to the instructions provided in Section “How to activate the Seller Marketplace Manager App”.

2. Select **“Upload Products”**.
3. Click on **“UPLOAD FILE”** to upload your product catalog.



How to upload your product catalog by adding a new offer

Steps for catalog upload

- After the catalog file has been selected, the system will map the fields accordingly. If all columns are mapped correctly, click on **"Import Now"** to proceed. When uploading products & offers, the platform will reflect the status of the import, whether they are imported successfully/ partially imported/ failed to import.

- In this example (5) there is one product that could not be completely imported due to missing fields. You can click **[View error report]** (5.1) to find out the reason. You may then correct the error either manually by clicking on the product or by re-submitting the file.

- All products uploaded will be reflected under the **"Products"** tab.

⚠ The products from the "Products" tab will only be visible for you. In order for your catalog to be visible to the desired company, you have to send your offer to the Chain IQ Marketplace team.

The screenshots illustrate the product upload workflow. The first screenshot shows the 'Field Mapping' interface where columns from the input file are mapped to standard Tradesift fields. It includes two steps: 'Check mapping of Mandatory fields' and 'Check Mapping of Optional fields'. A blue 'IMPORT NOW' button is visible at the bottom right, with a callout '4' pointing to it.

The second screenshot shows an 'Update finished with errors' message. It states: 'Your uploaded file contains some values that we could not recognize. To see the rows with errors please download the error report.' It reports '3 rows imported successfully' and '1 row partially imported.' A blue button 'GO TO SELLER MARKETPLACE MANAGER' and a link 'View error report' are present. A callout '5' points to the error message, and a callout '5.1' points to the 'View error report' link.

The third screenshot shows the 'Seller Marketplace' interface with the 'Products' tab selected. It displays a table of uploaded products with columns for checkboxes, image, SKU, name, variant group ID, price, category, and status. The table shows four products: 'Modern Yellow Chair', 'Modern Brown Chair', 'Modern Black Chair', and 'Modern White Chair'. The 'Modern White Chair' is marked as 'INVALID'. A callout '6' points to the 'Products' tab.

	SKU	NAME	VARIANT GROUP ID	PRICE (USD)	CATEGORY	STATUS
<input type="checkbox"/>	1238	Modern Yellow Chair		123.00	Chairs	ACTIVE
<input type="checkbox"/>	1248	Modern Brown Chair		123.00	Chairs	ACTIVE
<input type="checkbox"/>	1247	Modern Black Chair		123.00	Chairs	ACTIVE
<input type="checkbox"/>	1237	Modern White Chair		123.00		INVALID

How to upload your product catalog by adding a new offer

Steps for catalog upload

- Click on the **"Offers"** tab. Your offer will be visible under the **"Offers"** tab in the status **"Draft"**.
- Click on the **Offer name** (the name you have provided to your offer).
- An overview of your offer will be displayed. Click on the button **"Send"** located at the bottom of the page, on the right-hand side. Then press on the **"X"** button to leave the page.

The status of your offer will change to **"OFFERED"** and will be sent for approval to Chain IQ. When your offer will be approved by Chain IQ, the status of the offer will be **"PUBLISHED"**.

The image displays three screenshots of the Seller Marketplace Manager interface, illustrating the steps to create and send a new offer.

Top Screenshot: Shows the 'Offers' tab selected in the top navigation bar. A callout '7' points to the 'Offers' tab. Below, a table lists offers. A callout '8' points to the 'New offer' row. The status of the offer is 'DRAFT'. A 'CREATE OFFER' button is visible in the top right corner.

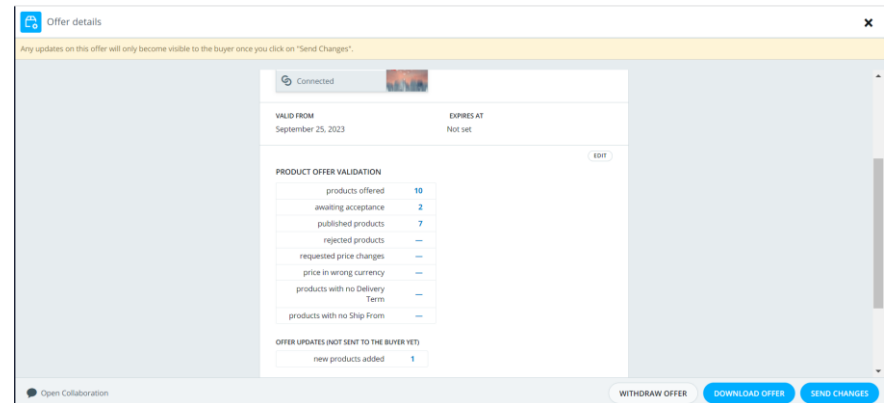
Middle Screenshot: Shows the 'New offer' form in the 'Review & Send' step (Step 4 of 4). The form displays details for the receiver (CIQ Marketplace) and the offer's validity (Valid from September 25, 2023). A callout '9' points to the 'SEND' button at the bottom right of the form.

Bottom Screenshot: Shows the 'Offers' tab again, but the status of the 'New offer' has changed to 'OFFERED'. The 'SEND' button is now highlighted with a callout '9'.

How to update your product catalog

Steps for updating your catalog on Tradeshift

1. To update your catalog by using the Catalog template, you must choose the Upload mode **“Update offer” from the template file**. For more details about how to work with the upload mode “UPDATE OFFER”, please go to section **“Upload Mode: UPDATE OFFER”**.
2. After you change the product information that requires updates, upload your modified file in the Seller Marketplace Manager via the Products tab. You must follow the same steps as for uploading your product catalog via the “Products” tab.



⚠ After you update your Offer through the “Products” tab, the changes you have performed to your product’s content (changed titles, descriptions, images, etc) will be directly visible in your Offer. If you add new items to your offer, you will have to send your changes to the Chain IQ Marketplace from the “Offers” tab, following the same steps as you did for sending your first offer.

Mapping your taxonomy on Tradeshift

When to use the category mapping tool and how to work with it

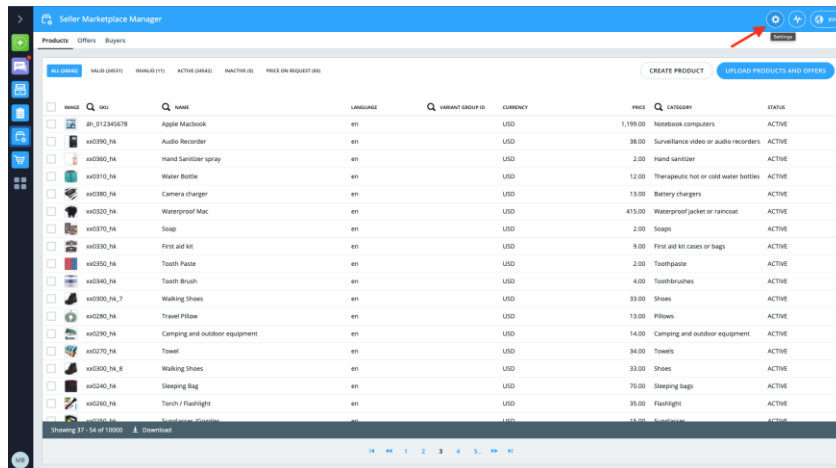
You need to map your categories to Chain IQ's if:

- If you wish to use your product categorization, which is a different standard than UNSPSC
- Your catalog includes categories that are not in scope of your client.

Using the category mapping tool will help you map your categories with the ones accepted by the platform and/or your customer/s in an efficient way. The categories mapped will be saved in the system and the mapping will automatically be applied to future catalog uploads.

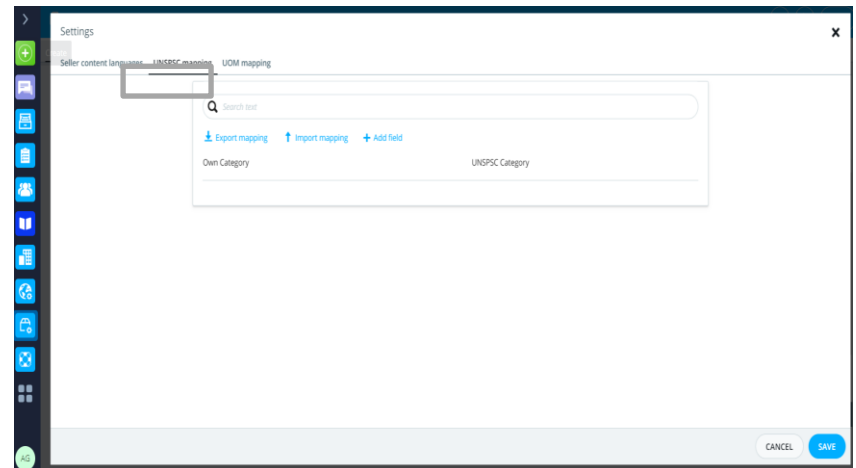
Mapping can be done before the catalog upload, as a prerequisite, or after uploading your catalog.

1. The category mapping tool can be accessed from the Settings Icon on the top right part of the Seller Marketplace Manager screen:



2. Access the UNSPSC Mapping dedicated tab. Here a seller can view and maintain the category mapping.

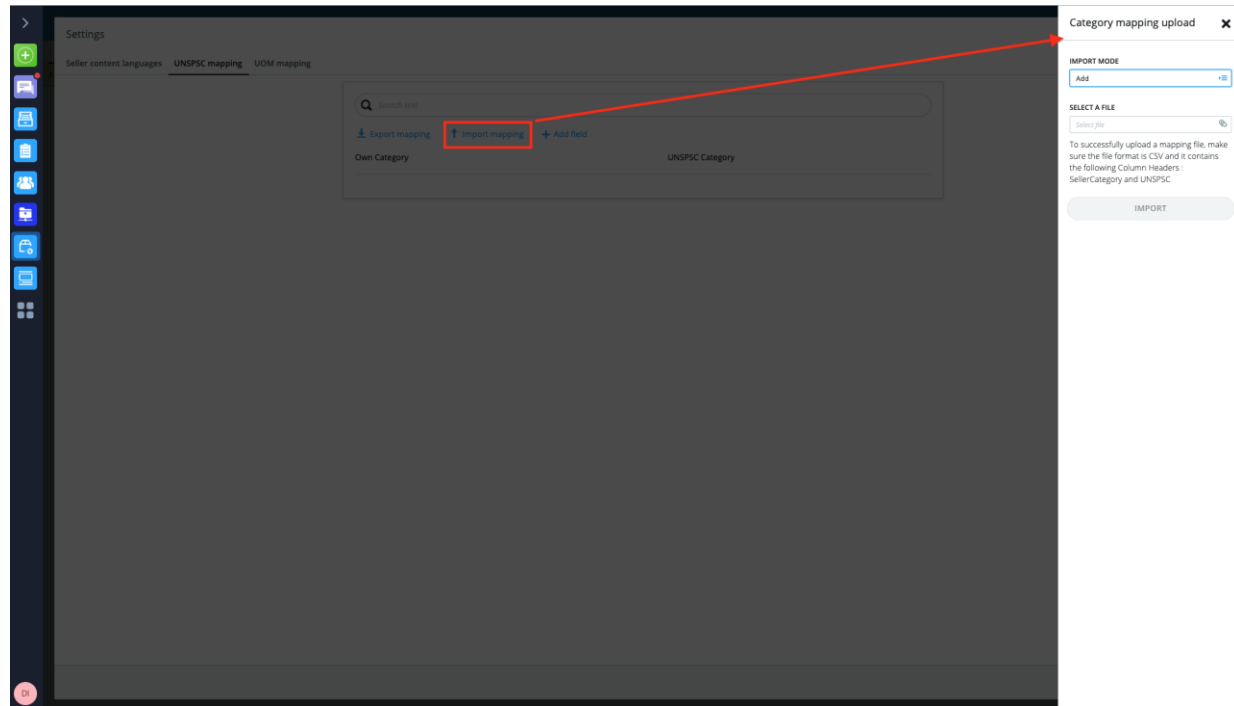
The screen will be empty the first time it is used.



Mapping your taxonomy before catalog upload

How to use the category mapping tool

3. In order to import your mapping file, choose import mapping, select the type of operation (add new mapping or replace existing) and select the file.



4. To successfully upload a mapping file, make sure the file format is CSV and contains the following Column Headers: **SellerCategory** and **UNSPSC**. The column „SellerCategory” must contain your category and the column “UNSPSC” must contain the corresponding UNSPSC to which you want to map your taxonomy.

Mapping your taxonomy before catalog upload

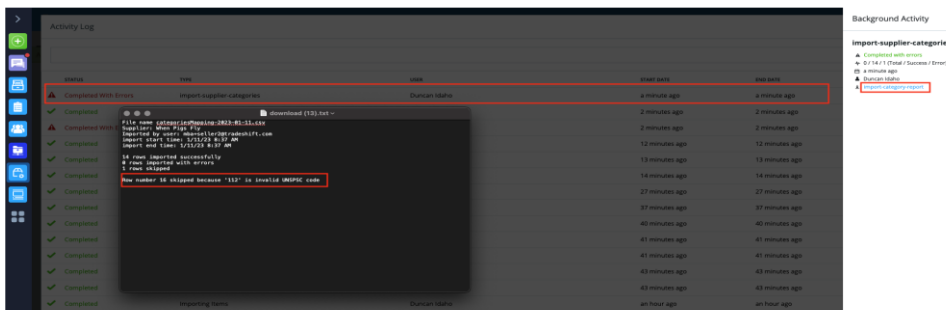
How to use the category mapping tool

5. File will be validated and any errors will be displayed in the **Activity Log**.

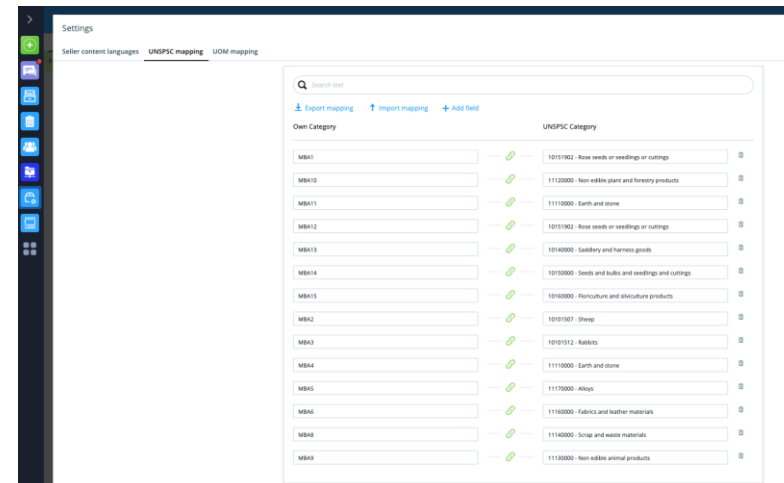
In this case, one of the values added in the UNSPSC category column did not match a valid category, and it was rejected.

All of the other mappings have been successfully uploaded.

Import has errors



Successfully imported

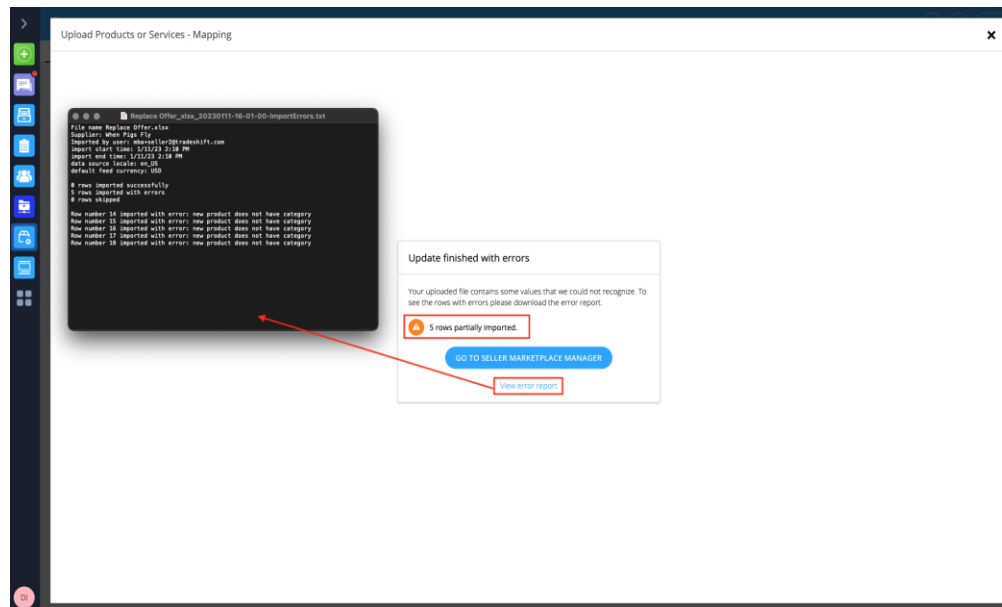


6. After you have uploaded the category mapping file, the next step is to upload a new offer using the upload mode „**ADD NEW OFFER**“. At the next catalog upload, the mappings will be taken into consideration and the products will be successfully uploaded.

Mapping your taxonomy after catalog upload

Using the category mapping tool after the catalog upload

- During each file upload, the products are checked whether they have a valid UNSPSC category assigned.
- If the product category is not present or it is different from the UNSPSC taxonomy, the specific products will be partially imported.
- The error report will state exactly which of the products had a category mismatch.



⚠ This type of error means that products are uploaded in the Tradeshift account, but are put into an Invalid state, until a UNSPSC category has been assigned.

Mapping your taxonomy after catalog upload

Using the category mapping tool after the catalog upload

The other scenario in which you must map your categories after catalog upload is when the UNSPSC categories you have used did not match the categories in scope for the respective customer/s.

- This issue will not be highlighted through an error on the platform, but it will be highlighted by the Catalog team.
- Using different categories than those in scope for your customer means that your customer will not be able to order your items unless you assign a different category.

In this type of scenario, you can use the category mapping tool to import the category mapping file as described in the section „Mapping your taxonomy on Tradeshift”.

- After you have imported your category mapping file on the Tradeshift category mapping tool, the next step is to upload the same offer again by using the upload mode **„UPDATE OFFER”**.
- The categories imported in the category mapping tool will be automatically assigned to your products.

04

Catalog content best practices

In this section you will learn:

- How to create the catalog in multiple languages
- Recommended content quality

Add catalog content in different languages

How to add products in multiple languages in your Tradeshift catalog

- As a Seller, you have the option to maintain your products on Tradeshift in various languages depending on your target audience. This is called **Product Localization**.

Note: Tradeshift does not automatically translate the content of uploaded products.

- You can perform Product Localization by uploading multiple languages at once when you first upload your products on Tradeshift.

To upload products in multiple languages, you must duplicate the line item from the Catalog Upload File, insert the content in the corresponding language, and then fill in the language code.

Note: You must add a new line, insert the same SKU, and fill in the product details for every new language you want to upload your products in.

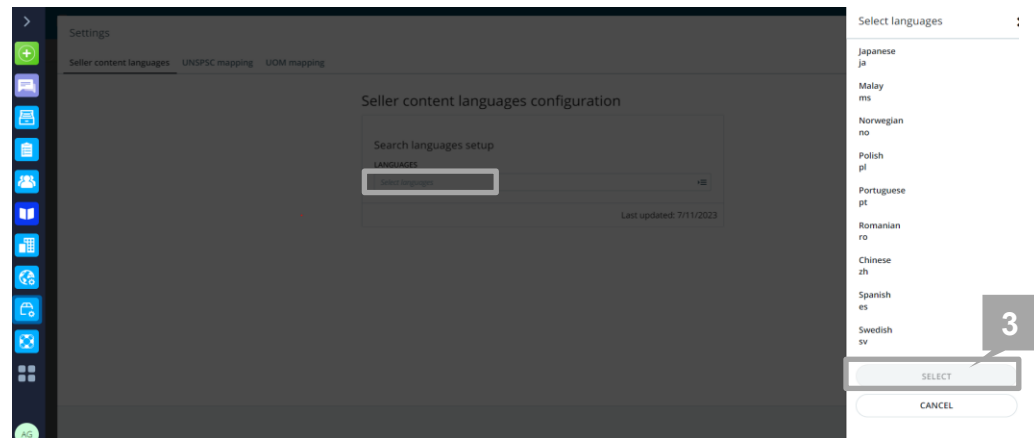
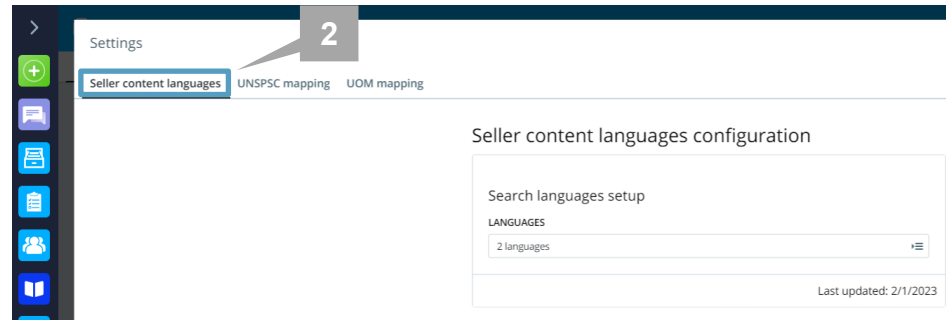
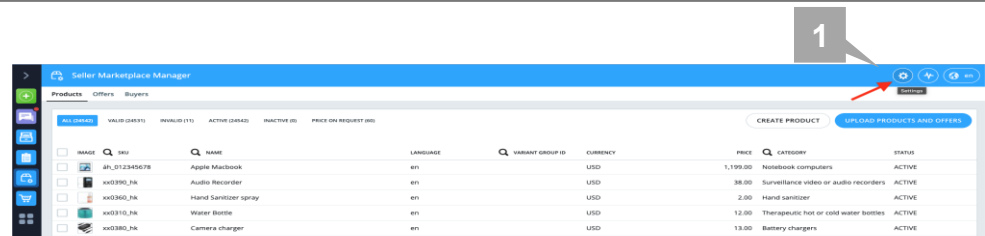
	A	B	C	
1	Tradeshift			
2				
3	Upload Mode	UPDATE PRODUCTS	MANDATORY!	
4	Offer Title		MANDATORY! This title needs to be unique among the available offers in Tradeshift	
5	Message		OPTIONAL!	
7	Receiver ID		MANDATORY! Name of the receiving company (Offer modes only) case sensitive MANDATORY	
8	Valid from		OPTIONAL! Format: YYYY-MM-DD	
9	Expires at		OPTIONAL! Format: YYYY-MM-DD	
10	Country		OPTIONAL! Enter the country code of your target markets, if several codes are to be entered, then separate them by comma	
11	Us State		OPTIONAL! Enter the US state code, if several codes are to be entered, then separate them by comma	
12				
13	sku*	Language	Name* Description	
14	1	en	Classic Sandwich Platter	Chicken, bacon and lettuce Chicken breast, sweetcure bacon, seas
15	1	fr	Classique Plateau Sandwich	Poulet, bacon et laitue Poitrine de poulet, bacon sucré, mayonnais
16	10	en	Mini Cheese And Onion Rolls	64 rolls with a blend of British cheeses and onion wrapped in puff
17	10	fr	Mini-rouleaux au fromage et à l'oignon	64 petits pains avec un mélange de fromages britanniques et d'oïl

Display catalog content in different languages

How to see your uploaded products in different languages on Tradeshift

- Product details that can be localized in multiple languages are **Title**, **Description**, and **Keywords**.
- In **Shop**, Products are displayed based on the Language specified by the customer in the User Settings section of his Tradeshift Account.
- For your products to be displayed in the languages in which you have uploaded them, access the content languages configuration tool.

- The content languages configuration can be accessed from the **Settings Icon (1)** on the top right part of the Seller Marketplace Manager screen
- Click on **"Seller content languages" (2)** and select one or more languages you want to localize the products in.
- Click on the **"Select" (3)** button.
- Save your changes and then exit the page by clicking on the **"X"** button.

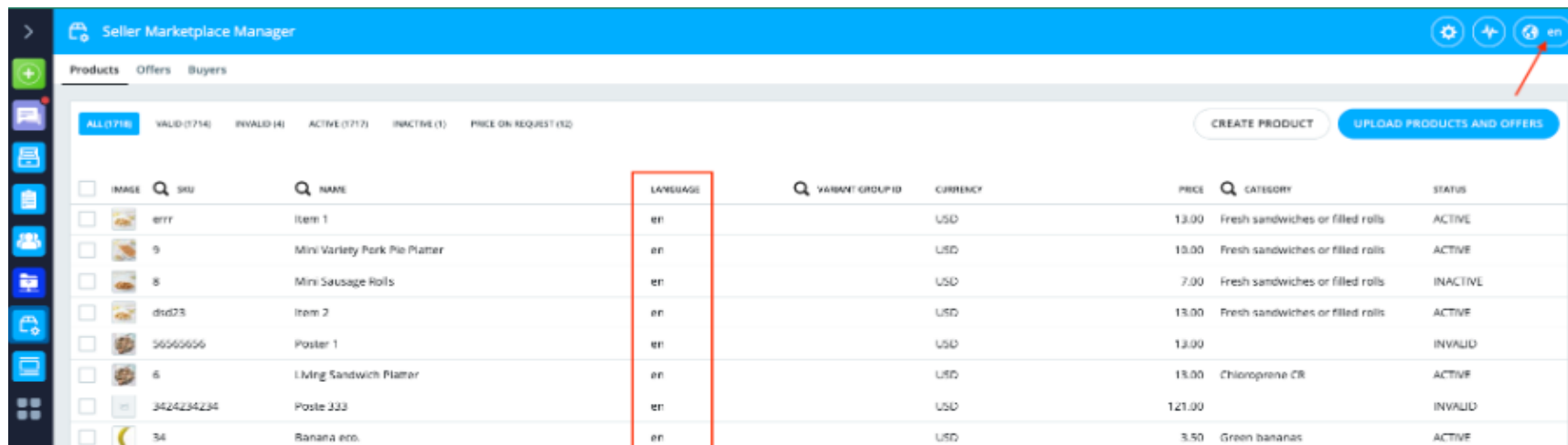


How to display catalog content in different languages

See your uploaded products in different languages on Tradeshift

- In the **Seller Marketplace Manager**, under the **Products tab**, the language column will show the language code that is used to display products.
- **To switch between language views**, choose a different language from the language selector in the upper right corner of your screen.
- The language used to display will be reflected in the “**language**” column, as well as in the code indicated by the language selector.

⚠ Note: If a product is not uploaded in the language that is currently used to visualize, it will be displayed in the default (original) language.



The screenshot shows the 'Seller Marketplace Manager' interface. At the top, there's a blue header with the title and a language selector showing 'en'. Below the header, there are tabs for 'Products', 'Offers', and 'Buyers'. The 'Products' tab is active, showing a list of products. The 'LANGUAGE' column is highlighted with a red box. The products listed are:

IMAGE	SKU	NAME	LANGUAGE	VARIANT GROUP ID	CURRENCY	PRICE	CATEGORY	STATUS
	0777	Item 1	en		USD	13.00	Fresh sandwiches or filled rolls	ACTIVE
	9	Mini Variety Pork Pie Platter	en		USD	10.00	Fresh sandwiches or filled rolls	ACTIVE
	8	Mini Sausage Rolls	en		USD	7.00	Fresh sandwiches or filled rolls	INACTIVE
	dnd23	Item 2	en		USD	13.00	Fresh sandwiches or filled rolls	ACTIVE
	56565656	Poster 1	en		USD	13.00		INVALID
	6	Living Sandwich Platter	en		USD	13.00	Chloroprene CR	ACTIVE
	3424234234	Poste 133	en		USD	121.00		INVALID
	34	Banana etc.	en		USD	3.50	Green bananas	ACTIVE

Catalog content – quality of information

Mandatory and good to have fields to be filled in the catalog template

Mandatory	Good to have
<ul style="list-style-type: none">▪ Product ID▪ Language▪ Name▪ Description▪ Unit of Measure▪ Category (UNSPSC Commodity Code)▪ Lead Time▪ Image▪ Price▪ Currency▪ Terms & Conditions*	<ul style="list-style-type: none">▪ Brand▪ Manufacturer Item ID▪ Keywords▪ Item Specific attributes (Color, Weight, etc)▪ Country of Origin▪ Certificates <p>Refer to <u>this article</u> or <u>Tradeshift University video</u> about how to add variant attributes to your products (make sure you are logged in to your Tradeshift account to access the materials).</p>

* Only for Chain IQ Consortia Marketplace sellers

Catalog content quality

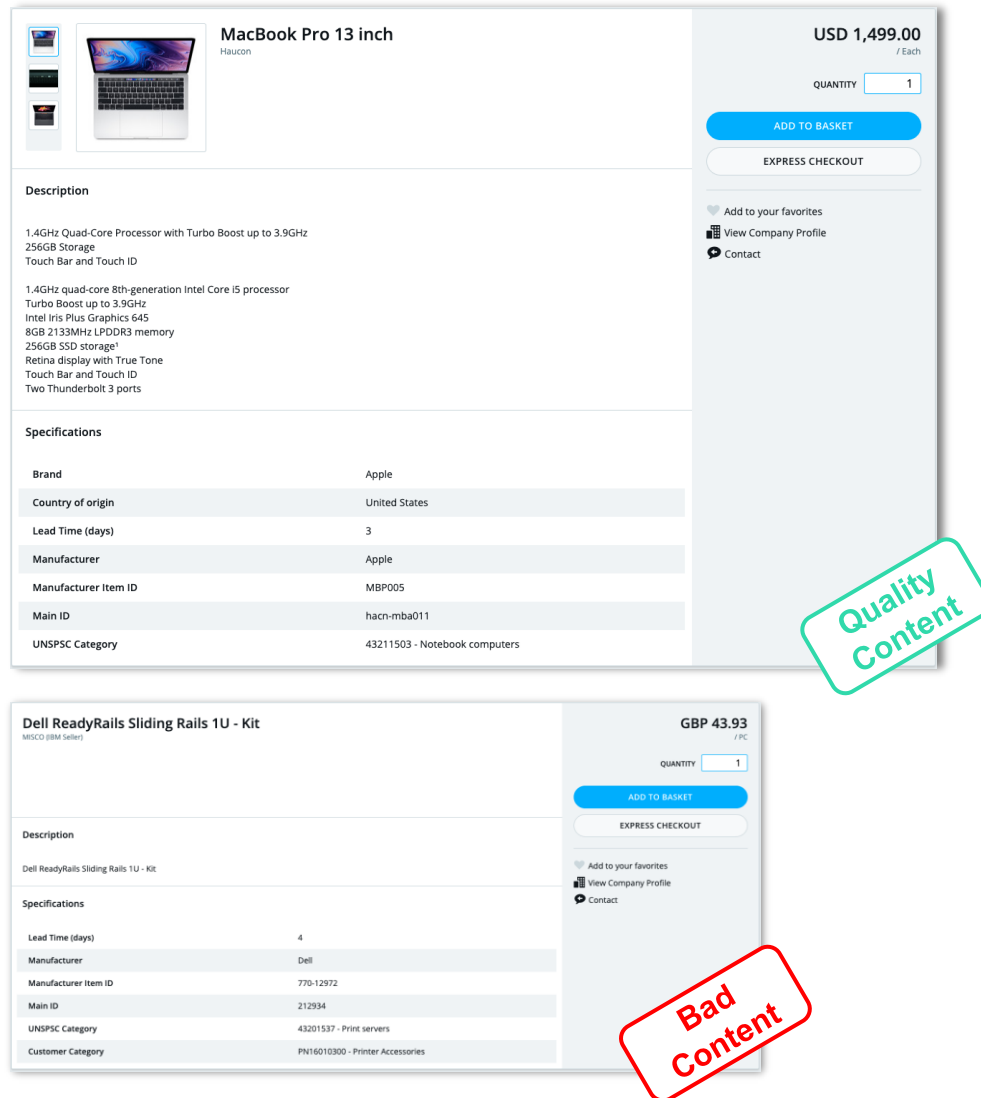
Recommendations for content quality

Catalog content should be of the highest quality possible to facilitate product discovery and selection

NAME	<ul style="list-style-type: none">The Product name is often the first thing a client's end user sees when searching for products/services. The Product Name is sometimes referred to as Short Name, Short Description, or simply Name. The information in this field should be unique and clearly identify the product. The field should contain information in the following format: Type of product - Brand and model - Keywords. <p>⚠ NOTE: No in-cell line breaks (the ones you get when pressing ALT + ENTER in a cell) and no HTML tags can be entered in this field</p>
DESCRIPTION	<ul style="list-style-type: none">This field contains product information in addition to the information given in the Product name. The Product Description is sometimes referred to as Long Name, Long Description or Item Description. The text should provide the buying customer with enough facts about the product to make a purchasing decision. <p>⚠ IMPORTANT: Any word included in the “Name” and “Description” fields work as keywords in the shop's search function</p>
Images	<ul style="list-style-type: none">Watermark, label or logo on the pictures allowed only for highlighting use of environmentally friendly or sustainable materials.No shadows on the pictures- for main picturePrefer formats: Jpeg, Png, GifMinimum 500x500 resolutionMinimum 72 dpi
Brand	<ul style="list-style-type: none">These fields, if filled in, work as filters in the Shop. If provided will enhance the product listing and help clients in their purchase decision

Catalog content quality – best practice

How a product page should look like



- Intuitive **product name**
- High quality **images** bring life to the shop and add a layer of professionalism
- Clear and detailed **product description**
- Product **attributes** available immediately
- **Keywords** will make it easier for requesters to find items

05

Manage your documents

In this section you will learn:

- Use the Document Manager app
- How you receive orders
- How to accept orders

Document Manager app

How to use the Document Manager app

The document Manager app contains all transaction documents.

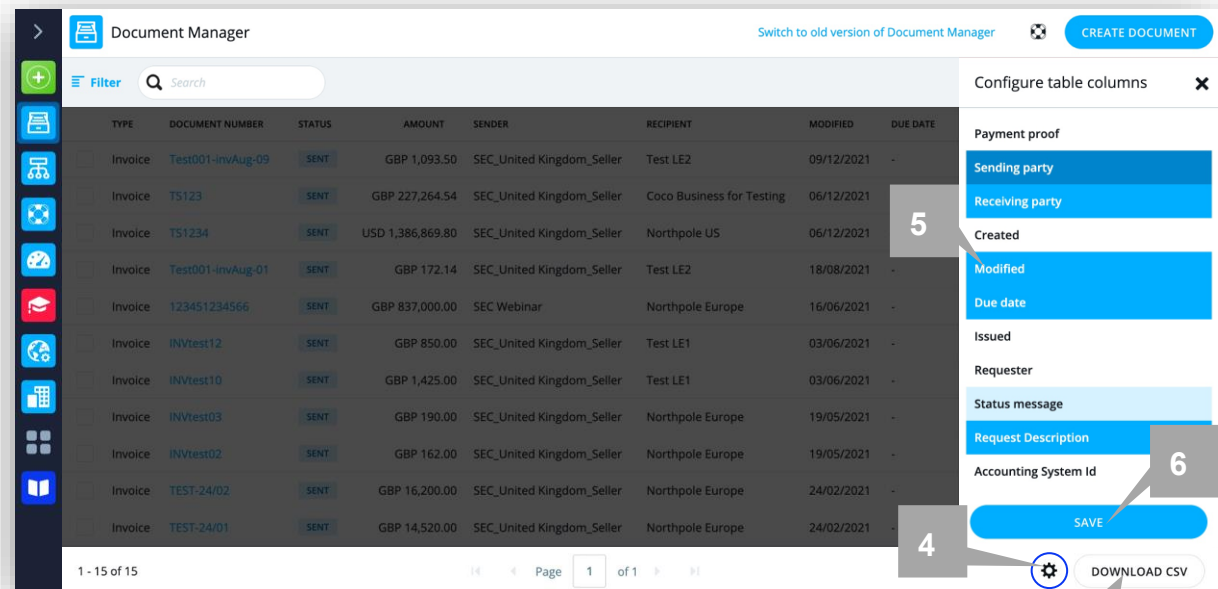
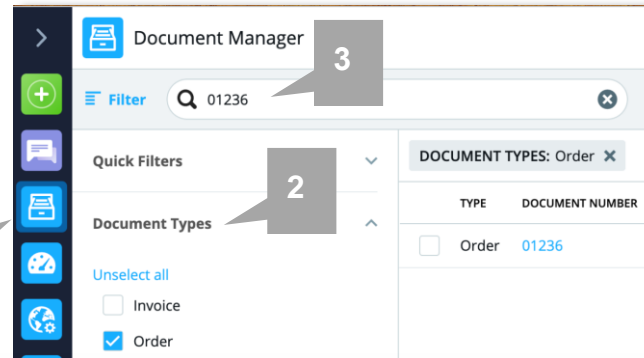
You can access the app from the main taskbar on the left (1)

You can easily search for a document by either:

- Applying filters (2)
- Using the Search bar (3) (the document number/ Buyer name/ item description/ amount)

You can customize the layout:

- Click on the settings icon (4)
- Choose a table column (5)
- Click on Save (6)
- You can download the available documents by clicking on 'DOWNLOAD CSV' (7)



How you receive purchase orders

Working with purchase orders and order notifications

As a seller, once you have an Offer published on the Tradeshift platform, **when the client places a Purchase Order:**

You will receive the digital Purchase Order via the Document Manager app on Tradeshift. You can view or download the Purchase Order from the platform.

If your email address is registered in your account to receive a notification email from Tradeshift, you will also receive the attachment of the PDF of the Purchase Order together with the notification.

- For the Sandbox environment (test system), you will receive the email from sandbox@sandboxes.tradeshift.com.
- For the Production environment (live system), the email will be received from information@tradeshift.com. Refer to [how to change the notification settings](#) for more information about the notification settings.

How you receive purchase orders

Activating order notifications for a different team member

Primary user who registered for the account will receive document notification (Orders).

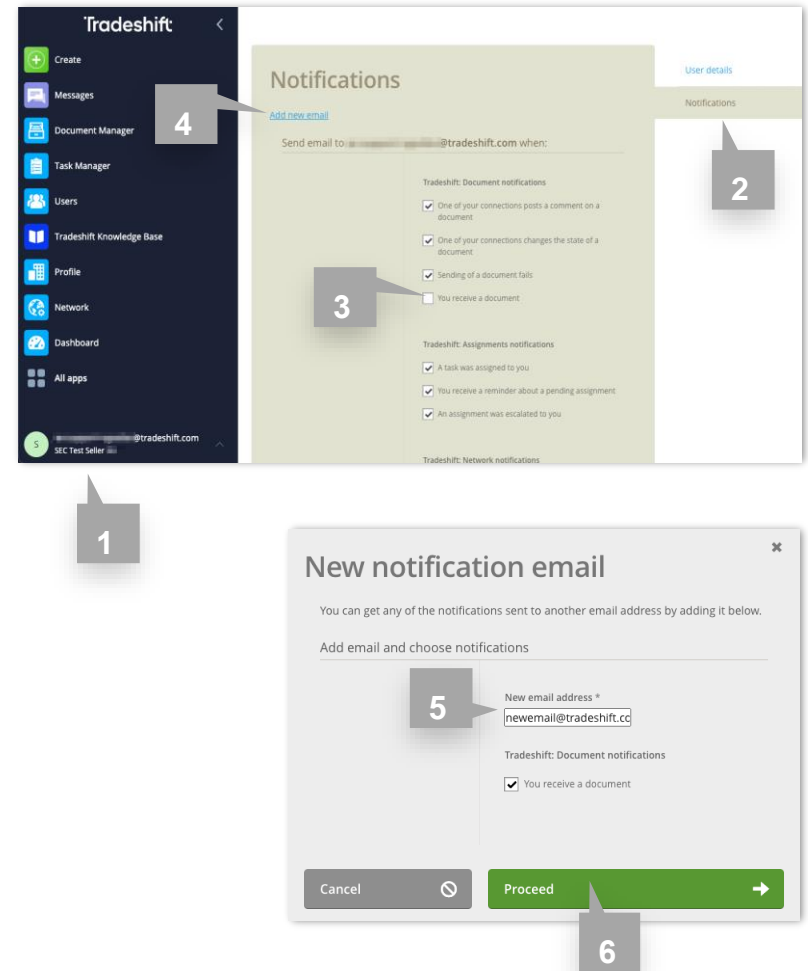
If you want a different team member to receive order notifications from Tradeshift and to accept the orders through Tradeshift, the first step is to add them as a User on Tradeshift. Go to slide 22 for instructions on how to add users to your Tradeshift company account.

The next step is to activate document notifications for a different user/email address.

To activate document notifications for a different user/email address:

1. Go to User Settings
2. Click [Notifications]
3. Uncheck “You receive a document” from the original email setting (primary user)
4. Click [Add new email]
5. Insert new email address then check the box “You receive a document”
6. Click [Proceed]

⚠ You can only select a notification type for one email address. In other words, each box can only be ticked under one email address in the setting.



Search for a Purchase Order on Tradeshift

How to find a Purchase Order

1. Click on the [Document Manager]
2. Search for an Order with the Order number or description/ amount on the search bar **or** Filter the list under [Document Type] -> select [Order]
3. Select the Purchase Order by clicking the Document ID

If you can't find the [Document Manager] app from the left panel, click on [All apps] to search for it.

The screenshot shows the Tradeshift Document Manager interface. On the left is a dark sidebar with navigation options: Create, Document Manager (highlighted), Switch to..., Support, Dashboard, University, Network, Profile, All apps, and Tradeshift Knowledge Base. A callout '1' points to the 'Document Manager' option. The main area has a 'Document Manager' header with a search bar and a 'Filter' button. A callout '2' points to the search bar. Below the search bar, 'Quick Filters' show 'DOCUMENT TYPES: Order' with 'Clear all' and 'Save' buttons. A callout '3' points to the 'Order' filter. A list of documents is displayed with columns: ORDER, STATUS, AMOUNT, SENDER, RECIPIENT, and ACTIONS. The list contains four entries, all of type 'Order'. A callout 'Tip: Click on [Clear all] to clear the filter(s) before searching for other documents' points to the 'Clear all' button. At the bottom, there is a pagination bar showing '1 - 4 of 4' and a 'DOWNLOAD CSV' button.

ORDER	STATUS	AMOUNT	SENDER	RECIPIENT	ACTIONS
<input type="checkbox"/> Order 2302202102	RECEIVED	USD 1,540,000.00	Northpole US	SEC_United I	***
<input type="checkbox"/> Order 2302202101	RECEIVED	USD 644,000.00	Northpole US	SEC_United I	***
<input type="checkbox"/> Order PO2302202102	ACCEPTED	GBP 648,000.00	Northpole Europe	SEC_United I	***
<input type="checkbox"/> Order PO2302202101	ACCEPTED	GBP 697,500.00	Northpole Europe	SEC_United I	***

Purchase Order - Overview

Elements of a Purchase Order

1. 'To' section indicates your company name as a supplier.
2. 'From' section indicates the buyer company who is placing the order, with the **invoicing address**.
3. 'Person of reference' or 'Requester' represents the user that placed the order.
4. This section refers to the line item details with the description of the Order item, quantity, price per unit, but also delivery address.
5. Delivery details indicate the **delivery address** of the item(s) ordered and are displayed both at the line-item level (see 4.1) and at the end of the PO (see 5.2).

⚠ **Invoicing address** and **delivery address** details may be different.

Platform view

Purchase Order received from Legal Entity SE01
Received via Tradeshift — Last update: 2 years ago

OTHER ACTIONS CREATE INVOICE ACCEPT

Purchase Order

1 To **BigCo Inc**
232
1 Tradshftgade
Glasgow
2324
United Kingdom
VAT number : GBAB938

2 From **Legal Entity SE01**
Billing Market Street
8821 94105
San Francisco
CA
Sweden
bigcodenmark+rp@tradeshift.com

3 Order number PO1
Order date 13/01/21
Currency DKK
Person reference bigcodenmark+rp@tradeshift.com

4

Line Id	Item ID	Description	Quantity	Unit	Unit price	Tax	Total DKK excl taxes
1		asdffa	45	pcs	2.00		90.00

5

Delivery to: 15 New Delivery Add, Delivery Locality Delivery City Wien, 1010, SE
Requested delivery period: Start date: 28/01/21 End date: 28/01/21

Subtotal excl taxes 90.00
Total DKK 90.00
Total taxes 0.00 DKK

5.2

Delivery details
Address 15 New Delivery Add
Delivery City Wien 1010
Delivery Locality Sweden

PDF view

Purchase Order

1 TO **BigCo Inc**
232
1 Tradshftgade
Glasgow
2324
United Kingdom
VAT number (VAT) : GBAB938

2 FROM **Legal Entity SE01**
Billing Market Street
8821 94105
San Francisco
CA
Sweden
bigcodenmark+rp@tradeshift.com

3 ORDER NUMBER PO1
ORDER DATE 13/01/21
CURRENCY DKK
PERSON REFERENCE bigcodenmark+rp@tradeshift.com

4

LINE ID	ITEM ID	DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	TAX	TOTAL DKK EXCL TAXES
1		asdffa	45	pcs	2.00		90.00

5

Delivery to: 15 New Delivery Add, Delivery Locality Delivery City Wien, 1010, SE
Requested delivery period: Start date: 28/01/21 End date: 28/01/21

Subtotal excl taxes 90.00
Total DKK 90.00
Total taxes 0.00 DKK

5.2

DELIVERY DETAILS
ADDRESS 15 New Delivery Add
Delivery City Wien 1010
Delivery Locality Sweden

Confirm order from the email notification

How to confirm an order

If your email address is set to receive the document notification from Tradeshift, you will receive this email notification in your inbox whenever a Purchase Order is sent from a client to you. To respond to the Purchase Order:

1. Open the email sent from the domain @tradeshift.com
 2. Click [Accept this order], this will direct you to the Tradeshift platform.
- If you are not logged in to the platform, **you need to insert your email address and password to log in first before clicking this link**
 - After login, click the link from the notification email, it will direct you to the PO page, as in the screenshot. (2)
 - You will be redirected to the Purchase Order details page on Tradeshift.

⚠ Clicking [Accept this order] from the email notification will not Accept the order directly, it will direct you to the Purchase Order page on the Tradeshift platform for further action.

The screenshot shows an email notification from Tradeshift. At the top, it says 'AG asks that you accept Purchase Order #41100 for 1,449.00'. Below this is an 'Order summary' section. It includes a 'From:' field with the name 'AG' and address '3007 Bern Switzerland'. There is a small icon of a person in a box. Below the address is a table with the following data:

Description	Quantity	Unit price	Total
Bluetooth adapter Microsoft Teams Stereo Black	1 pcs	1,449.00	1,449.00

Below the table, it shows 'Subtotal excl taxes: 1,449.00' and 'Total in SEK: 1,449.00'. At the bottom right, it says 'Total taxes 0.00'. There are two buttons at the bottom: a green button labeled 'Accept this order' and a light blue button labeled 'Write a reply'. A small '1' in a grey box points to the top of the email, and a small '2' in a grey box points to the 'Accept this order' button.

If you've received this order by mistake or you disagree with its contents, [you may reject/dispute this order](#).

Confirm order in Tradeshift

How to confirm an order

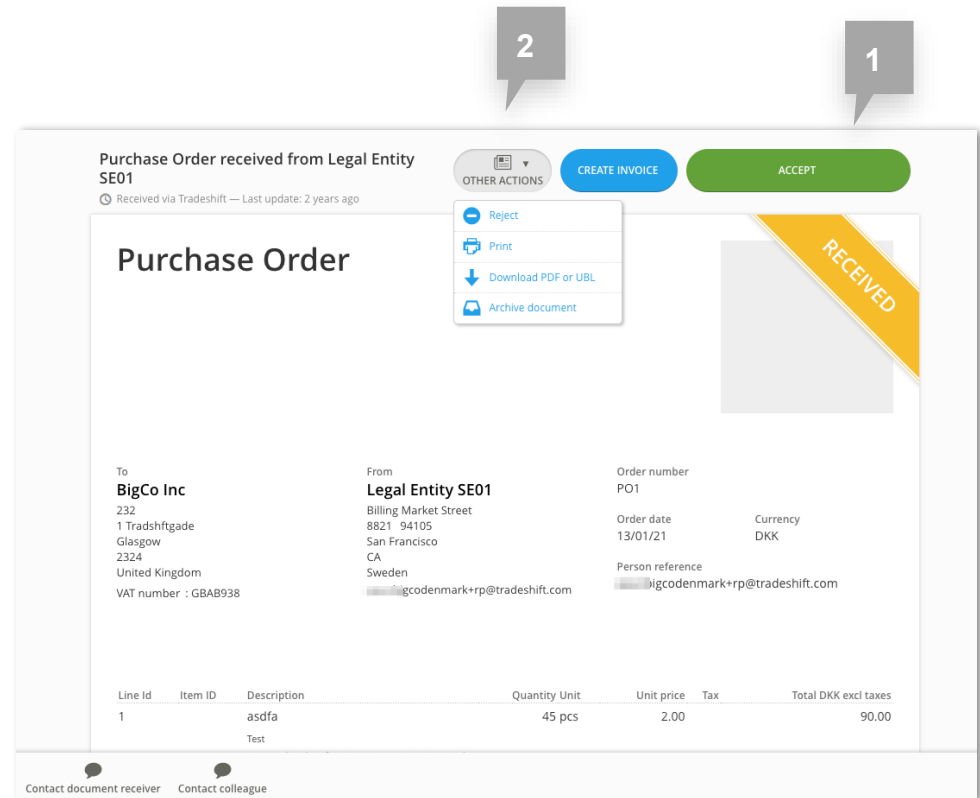
On the Tradeshift platform page, you landed on the Purchase Order details page (if you used the email notification).

The other option to access the Purchase order is by clicking the Purchase Order 'Document Number' in the [\[Document Manager\] app](#):

1. To Accept, click [ACCEPT] at the top right, the document status will be updated to [Accepted] which will be visible to the buyer.
2. To Reject, click [OTHER ACTIONS] -> [Reject], and the document status will be updated to [Rejected].

⚠ If you choose to Reject a Purchase Order, please send an email to the requestor/ client with a reason why the order is rejected (i.e. temporarily out of stock, invalid price, etc.).

⚠ Orders must always be confirmed either through Tradeshift or directly by email to the Requester. We recommend you confirm orders through Tradeshift. If there are any changes regarding the order (delivery date or price changes), please also inform the Requester of the order by email.



06

Create your Tradeshift Production account

In this section you will learn:

- How to activate your account
- How to fill in your company info
- How to connect with your clients/ Chain IQ Marketplace

Account Activation

How to activate your account in the live system – Production environment

Chain IQ requests Tradeshift to set up your account in the Production environment (live).
You will receive an email with the activation link from Tradeshift (email: supplierinvitation@tradeshift.com).

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

If you did not find the email in your inbox, search also in the junk/spam mailbox.

If you did not receive the email, **you can reach out to marketplace@chainiq.com.**

Follow the link provided in the email and fill in the requested company information:

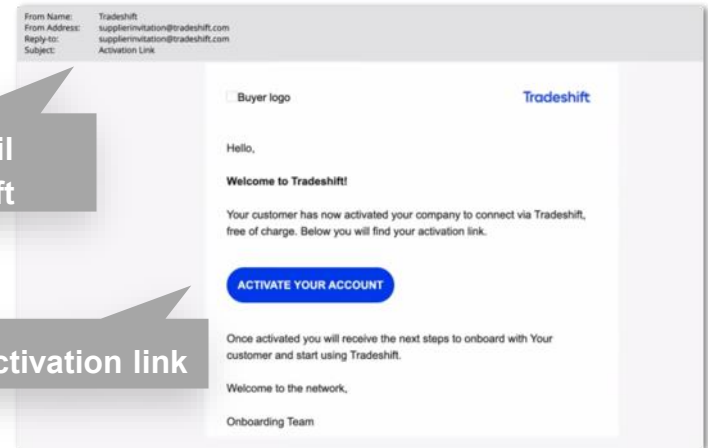
Business name

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.

Invitation email
from Tradeshift

Activation link

A screenshot of the Tradeshift account activation page. 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' (highlighted in yellow), 'Create your account', 'Choose a password', and 'Start using Tradeshift'. The main content area is titled 'Confirm your company info' and contains two input fields: 'BUSINESS NAME' with the value 'Tradeshift Inc' and 'COUNTRY/REGION' with a dropdown menu showing '- Select country/region -'. At the bottom of the form is a blue 'CONTINUE' button.

Activate your Tradeshift company account

How to activate your account in the live system – Production environment

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.

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 displays the Tradeshift account activation interface. At the top, the 'Tradeshift' logo is on the left, and 'LEARN MORE' and 'ENGLISH (UK)' links are on the right. A progress bar below the logo shows four steps: 'Confirm company info' (highlighted in yellow), 'Create your account' (active), 'Choose a password', and 'Start using Tradeshift'. The 'Create your account' form includes fields for 'FIRST NAME', 'LAST NAME', 'EMAIL ADDRESS' (containing 'test01@tradeshift.com'), and 'LANGUAGE' (set to 'English (UK)'). Below these fields are two checkboxes: 'By signing up, you are indicating that you have read and agree to Tradeshift's Terms of Service and Privacy Policy.' and 'Yes, I want to receive marketing communications from Tradeshift.' A blue 'CONTINUE' button is at the bottom of the form. A grey callout box points to the email address field with the text 'Enter the email address which will be the login email of your account'. Below the first form, a second form titled 'We've verified your email address' shows a green checkmark and the heading 'Choose a password'. It instructs the user to 'Set up a password to complete your account activation.' and features a 'PASSWORD' field with a strength indicator 'At least 10 characters, not all lowercase' and a 'Show password' checkbox. A blue 'START USING TRADESHIFT' button is at the bottom. A grey callout box points to this button with the text 'Click here to login'. Another grey callout box points to the 'CONTINUE' button of the first form with the text 'Click continue to proceed'.

Update Company Profile and invite additional users

How to update the company profile information and invite new team members

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

Mandatory

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

Optional:

- Company Logo
- Industry
- Phone
- Company Email Address

Tips: Refer to the articles here on [How to add users via Profile](#) or [How to add users via the User app](#)

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

The screenshot shows the Tradeshift app interface. On the left is a sidebar with icons for Create, Dashboard, Document Manager, App Store, Switch to..., Network, Support, Profile (highlighted), Create Documents, and All apps. The main screen displays the user's profile for 'SEC_United Kingdom_Seller'. The 'Complete your profile' section has a 'Profile strength 35%' indicator. Fields include: COMPANY NAME (SEC_United Kingdom_Seller), WEBSITE, INDUSTRY, COMPANY OWNERSHIP, COMPANY ADDRESS (London, GB), PHONE, DEFAULT PAYMENT TERMS, COMPANY DESCRIPTION, COMPANY SIZE, SHARE CAPITAL, REGISTRATION ADDRESS, and COMPANY EMAIL ADDRESS. There are 'INVITE TEAM MEMBER' and 'DONE' buttons at the bottom.

Tip: Click here to invite additional users

Company Identifiers

EDIT

Company ID type

Company ID/Number

Tax ID type

VAT ID/Number

Company ID/ Business Registration Number and Tax/ VAT ID must be updated in the Company Profile.
Invoices **will NOT be submitted successfully** if these mandatory fields are not updated.

Do you already have a Tradeshift company account?

Steps to be performed for an existing account on Tradeshift

Even easier! If you have access on your company account, just make sure that you are connected to your Buyer. You can verify that under the “Network” App. (1)

If you don't have access to your Tradeshift company account, ask the Company Admin who has access, to add you as a user from the '**Profile**' App.

If there is no option to get access to your Tradeshift company account, you can reach out to the Marketplace team at marketplace@chainiq.com.

The screenshot displays the Tradeshift 'Company Profile' application. The left sidebar contains navigation icons and labels: 'Create', 'Messages', 'Document Manager', 'Task Manager', 'Users', 'Tradeshift Knowledge Base', 'Profile' (highlighted), 'Network', and 'Seller Marketplace Manager'. The main area is titled 'Company Profile' and features a 'Complete your profile' section. This section includes input fields for 'COMPANY NAME', 'WEBSITE', 'INDUSTRY', 'COMPANY OWNERSHIP', 'COMPANY ADDRESS', 'PHONE', 'COMPANY DESCRIPTION', 'COMPANY SIZE', 'SHARE CAPITAL', 'REGISTRATION ADDRESS', and 'COMPANY EMAIL ADDRESS'. A red arrow points from the 'Profile' option in the sidebar to the 'INVOKE TEAM MEMBER' button located at the bottom of the profile form. To the right of the profile form is a 'Manage team' panel with a search bar and an 'ADD USER' button.

Do you already have a Tradeshift company account?

Steps to be performed for an existing account on Tradeshift

If you are an existing user on Tradeshift, you will receive a connection request from the Chain IQ Marketplace Team or/and your customer.

- Go to '**Network**' (1)
- Under '**My Network**' tab (2), click '**VERIFY**' (3) to accept the connection request from clients and/or the Chain IQ Marketplace.

The screenshot shows the Tradeshift user interface. On the left is a dark sidebar with a menu. A callout '1' points to the 'Network' menu item. The main content area is titled 'Network' and has a sub-header with tabs: 'MY NETWORK', 'GROUPS', and 'TRADESHIFT NETWORK'. A callout '2' points to the 'MY NETWORK' tab. Below the tabs is a yellow warning banner: 'You have 3 unverified relationships to review'. Below that is a search bar and a '+ Add filter' link. A table titled 'CONNECTIONS (20)' lists three entries. The first is 'Chocolate Bar Test Buyer GmbH' with a 'Connection' relationship. The second is 'Test Buyer A Limited' with an 'Unverified relationship' and a blue 'VERIFY' button. A callout '3' points to this 'VERIFY' button. The third entry is 'Test Buyer B Limited' with a 'Connection' relationship. 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 Hungary		Unverified relationship VERIFY REMOVE ...
Test Buyer B Limited Austria		Connection ...

07

Seller support & Seller requirements

In this section you will learn:

- Where to find support information
- Frequently asked questions
- Seller performance criteria

Support Information

Where you can find support information on how to use Tradeshift

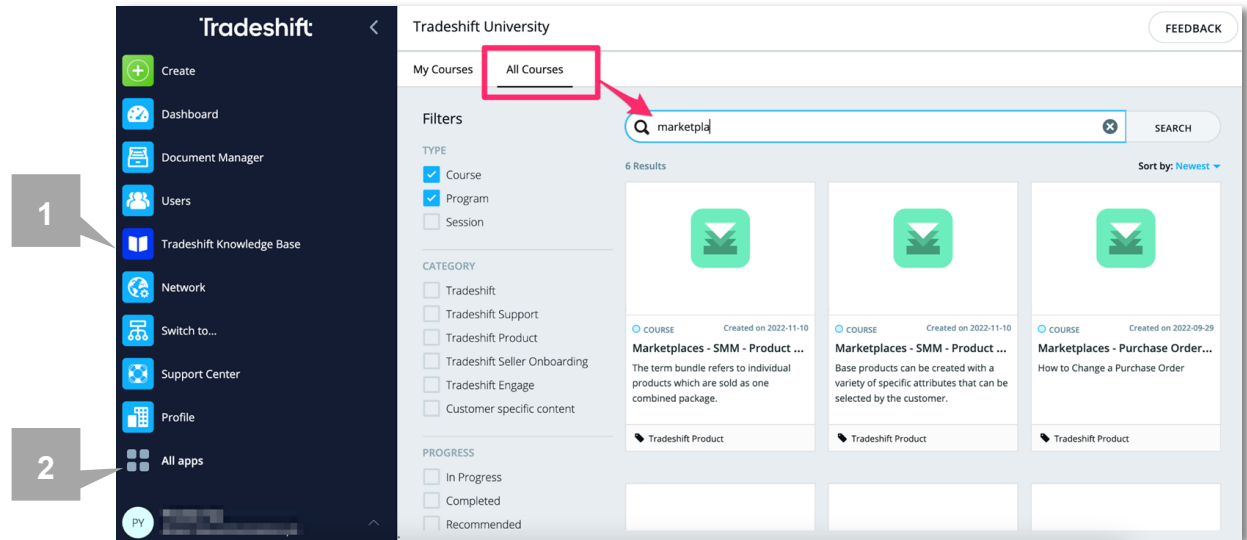
We encourage sellers to utilize the support information available on the platform, such as:

1. Knowledge Base (articles)
2. Tradeshift University (videos)

You can easily browse for relevant articles or videos to learn about how to navigate through the platform.



The University app can be accessed only after logging in to the platform. Go to 'All apps' to search for the app, you may look for the relevant video by inserting the keywords/ topic on the search bar (as shown in the screenshot).



FAQs – Frequently asked questions

Most frequently asked questions from suppliers

1. How do I obtain the Activation Link from Tradeshift?


You will receive the Activation Link via invitation email from Tradeshift. If you cannot find the invitation in your inbox, please check the junk/spam folder. Contact the Chain IQ Marketplace team if you did not receive it.


2. How to add additional users to access my company account?

You can add more users via the Profile app, refer to [this article](#) for details

3. I need to add a form for my product. Can I do that?

Of course! You just need to activate the Formbuilder app from the App Store to create a form. After creating a form, you have to add the form to your catalog template. To do this, copy the form ID (1) from the Form Builder app by clicking on the square (2) next to it. Then, paste the form ID in the field “Form ID” from Tradeshift catalog template. The last step is to simply upload your offer on Tradeshift.



NAME	DESCRIPTION	ID		CREATED ON	STATUS
Parameters required for flower orders	Parameters required for flower orders	acbd157d-7ae0-47ed-98a7-6a0fb150a533		11/15/2022, 11:51 AM	PUBLISHED
Test form shipping		fba56857-4d30-44c8-be05-ba2f1e77be5e		8/25/2023, 05:32 PM	PUBLISHED
Test minimum order value		c8445368-a9cc-4897-af57-e575de9d3ac2		9/5/2023, 03:26 PM	PUBLISHED
Test minimum order value		c8445368-a9cc-4897-af57-e575de9d3ac2		9/5/2023, 05:49 PM	DRAFT

FAQs – Frequently asked questions

Most frequently asked questions from suppliers

4. Can I offer product bundles?

Yes, you simply need to fill in the specific columns in your file in order to create a bundle. Refer to [this article here](#) or access the [Tradeshift University video - Product Bundles](#) to learn about it

5. What Units of Measures are supported by Tradeshift?

Tradeshift supports a specific Unit of Measure (UoM) which can be found [here](#). If the UoM is not provided when uploading products, the platform will utilize 'Each' or 'EA' as the default UoM. You can also find the UoM supported by the platform in the Content Upload Template sheet -> "Code List" tab.

6. I have a product with different attributes (ie. different sizes, colors). How can I enable the selection based on the attributes?

Yes, you can add a Variant Group for a product with different attribute options. Refer to [this article](#) or [Tradeshift University video](#) about how to add variant attributes to your products.

Seller performance

How seller performance is evaluated

In our client's best interest, Chain IQ is constantly monitoring the performance of the services offered by the sellers.

If required, we take actions to prevent/minimize any potential negative impact on the client's satisfaction.

Category	Service
Delivery	<ul style="list-style-type: none">▪ Meet specified delivery times▪ Delivery accuracy (to the correct address)
Pricing	<ul style="list-style-type: none">▪ Price stability (same price for at least 3 months)▪ Aligned with the requirements (is without VAT and any additional costs are mentioned in the offer)
Services (invoicing, SLA, T&Cs)	<ul style="list-style-type: none">▪ Invoicing aligned with client requirements▪ Seller contacts upfront the client for non-paid invoices?▪ Invoice in local language▪ SLA for responding to inquires▪ Clear Warranty & Return policy
Catalog management	<ul style="list-style-type: none">▪ On-time catalog updates▪ Optimized content
Order process	<ul style="list-style-type: none">▪ Confirm order acceptance in Tradeshift or sent confirmation directly to users▪ Orders are accepted in less than 1 business day

Contact

Information

Chain IQ Group AG
Neuhofstraße 24
CH-6340 Baar

www.chainiq.com

Contact emails:

marketplace@chainiq.com

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