NHS SBS has partnered with Tradeshift to enable us to move from paper based operations to electronic invoicing. This is a significant development that has the potential to change the way invoicing is managed within the NHS. This new way of working has many advantages which we’re confident you will start to quickly benefit from.
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SUPPLIER BENEFITS
The Tradeshift platform is the ideal invoicing solution for all suppliers, regardless of size or offering. It is free for suppliers, simple to use and offers a multitude of benefits. The platform is based on the principles of business to business networking, where suppliers can create a simple profile, insert their template information and start submitting invoices straight away!

**Easy setup**
- Sign up is quick and simple
- Different sending methods cater for suppliers of all shapes and sizes
- Large suppliers can choose from a variety of seamless integration methods with their existing financial systems

**Free to use**
- No setup fees, transaction fees or service charges
- Invoice other customers through the Tradeshift network at no additional charge

**Direct monitoring and communication**
- Receive confirmation of invoice receipt by the NHS SBS oracle system
- Monitor individual invoice progression with daily status updates advising when an invoice has been received, approved, disputed and paid
- Access reports within Tradeshift of all the supplier’s invoices and credit notes

**Instant validation**
- Upfront validation rules ensure invoices contain all required data before submission, reducing likelihood of returned invoices due to missing information

**Reduce business costs**
- Eliminate printing and postage costs associated with submitting paper invoices
- Reduce time spent calling NHS SBS or NHS Organisation confirming invoice has been received

**Methods of sending**
There are three ways in which you can send invoices via Tradeshift.
• One is the ‘portal’ method, as detailed within this guide. On which you can input your invoice directly onto the Tradeshift website.

• The second is the ‘document uploader’ method, in which an image file can be uploaded onto Tradeshift, this is then converted by them in to an electronic invoice and returned to you for validation. At this point you can check the invoice contains the correct information and edit if not or send if so. You can also add attachments to the invoice at this stage.

• The third method is to ‘integrate’. In this instance invoice data is exported from your accounting system and uploaded onto a server provided by Tradeshift. The data is then mapped to produce an electronic invoice. This method is more appropriate for large volume suppliers. Tradeshift and NHS SBS will work with you and your IT department to implement.

User guides for all of these methods can be found at http://www.sbs.nhs.uk/home/working-with-suppliers/e-invoicing.

**ACCOUNT CREATION AND SETUP**

1. The first step is to visit https://go.tradeshift.com and to select the ‘create an account’ button.
2. You then enter your ‘Company Name’ and select ‘Get Started’.
3. You then receive an email to confirm the email address entered. Please click the button in the email and choose a password to use with your Tradeshift account.
4. You are then taken to the ‘Company Details’ screen in which you can enter your full company details such as organisation information and contact details, as below. Please enter your VAT Registration Number here if you are VAT registered as it does appear on the invoices and it can be necessary for the NHS to process your invoice.
5. You can also add your Company logo by uploading an image of this.

It is important to input your VAT number if you are VAT registered, as your invoice may not be processed without it.
6. You can specify if you wish for your Tradeshift profile to appear in search results on the web
6. Within the ‘settings’ tab you can also specify what type of e-mail notifications you wish to receive. For example you can receive an e-mail every time your document (invoice/credit note) changes state, this will then advise you once an invoice has been received, accepted, paid etc. You can amend this at any point.
Connecting to the NHS

1. Before you can send an invoice to the NHS, you must connect to the NHS Bodies. To do this, go to Network on the Tradeshift website and start typing in the name of the NHS Body you wish to connect to. In this example, we’re finding all the CCGs that can be connected to.
Outside your network

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHS BRENT CCG (07P)</td>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>NHS NENE CCG (04G)</td>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>NHS CUMBRIA CCG (01H)</td>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>NHS MID ESSEX CCG (06Q)</td>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>NHS CORBY CCG (03V)</td>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>NHS WEST ESSEX CCG (07H)</td>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>NHS BASILDON AND BRENTWOOD CCG (99E)</td>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>NHS CENTRAL MANCHESTER CCG (00W)</td>
<td>UNITED KINGDOM</td>
</tr>
</tbody>
</table>
2. You can click the green Plus Sign on the right of the NHS Body you wish to connect to, and then Invite To My Network. Once you've clicked this, NHS SBS will get a notification of your company name, and the NHS body you wish to connect with. We'll provide the necessary information for this, and you'll be emailed confirming the connection. This process normally takes between 24-48 hours.
Sending Invoices

1. Once you have received confirmation that you are connected, to send an invoice you select the ‘create’ tab followed by the ‘invoice’ tab. From the ‘To’ field you must then select the client you wish to invoice. You can search for the client using either the client entity code or organisation name as below. Please make sure you always select the account with the full “GB Topcliffe Lane, Phoenix House, Wakefield, WF3 1WE” address.
2. If you have not been connected to the NHS Trust as described in the section “Connecting to the NHS” above you will see the below message. Please go through the steps described there before you send an invoice on Tradeshift.
3 You can then continue to fill out the invoice; you must complete all fields before you are able to send, though you do not need to use an Optional Field or Item ID unless it has been recommended by the NHS Organisation.

You are unable to repeat an invoice number to prevent duplication. If you are registered as ‘100% mandatory PO’ you must enter a valid Purchase Order number as provided by the client.
4 Should you wish to attach your original invoice or additional documentation e.g. timesheets for the client’s attention you can do so as indicated below. The invoice can then be submitted by selecting the ‘Send’ button.

ONCE YOU HAVE HIT SEND, YOU CANNOT CHANGE ANY OF THE DETAILS ON THE INVOICE.
A CREDIT NOTE MAY BE REQUIRED IF INCORRECT INFORMATION IS PUT THROUGH
Credit Notes

1. You can send Credit Notes as well as invoices. You must initially download the Credit Note Application. Go to Apps on the left, and then More Apps.
2. Once selected you must activate the application
3. You can then create the Credit Note as you would an invoice, selecting the relevant client from the ‘To’ field. Again you must be connected to your requested client before a Credit Note can be submitted.

4. You can then send the Credit Note in the same way as an invoice by selecting the ‘send’ button
Status Updates

You can track your invoices from the ‘Documents page’. You will receive status updates advising of which stage your invoice/credit note is at.
<table>
<thead>
<tr>
<th>TRADESHIFT STATUS</th>
<th>Invoice Status STATUS</th>
<th>DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SENT</td>
<td>Invoice has passed the validation rules and is in the process of reaching SBS Oracle system.</td>
<td>It is important to remember that invoice status is only updated on a nightly basis. The invoice will be delivered into our oracle database 10 minutes after submission but you will receive the status update the following day</td>
</tr>
<tr>
<td>DELIVERED</td>
<td>NHS SBS has received the Invoice and it is currently being processed.</td>
<td>This status will be DELIVERED until the invoice is approved and validated for payment</td>
</tr>
<tr>
<td>ACCEPTED</td>
<td>Invoice has been approved by the NHS Organisation and is either ready for payment when the trust approve the Payment Run.</td>
<td></td>
</tr>
<tr>
<td>PAID</td>
<td>Invoice has been paid. Please note we use BACS to send the funds so it will reach your account within 3-4 working days</td>
<td>You will still receive a separate remittance from NHS SBS</td>
</tr>
<tr>
<td>DISPUTED</td>
<td>The invoice /credit note is on hold in Core Oracle.</td>
<td>If you need clarification of the dispute reason, you should contact the accounts payable helpline on 0303 123 1177</td>
</tr>
<tr>
<td>REJECTED</td>
<td>The Invoice /Credit note has been cancelled.</td>
<td>If you need clarification of the rejection reason, you should contact the accounts payable helpline on 0303 123 1177</td>
</tr>
</tbody>
</table>
Client Approval Process

The approval process for clients will not change. Our clients will continue to login to the Oracle system as they currently do to approve paper invoices. The image is a digital copy and is therefore ‘crystal clear’. Invoices are received and are available to approve within 10 minutes of a supplier submitting an invoice via Tradeshift. Fewer invoices will be retuned due to scanning errors and the up-front validation rules in place on Tradeshift.

Here is an example of a Tradeshift invoice;

![TS Invoice 3.pdf]

The image appears in Oracle exactly as it appears on Tradeshift.

If you any queries in relation to any of the above please don’t hesitate to contact the eInvoicing team at SBS-W.e-invoicingqueries@nhs.net