

Getting Started with Tradeshift



Introduction

Tradeshift is a global platform, with user-friendly design and layout promoting transparency via real-time purchase order and invoice processing, with **ZERO** registration or transactional costs for suppliers

Benefits of Transacting via Tradeshift

- Receive PO's electronically
- Confirm PO's electronically
- Collaborate on PO quantity, delivery schedules and more
- Submit your Advanced Shipping Notice (ASN) and invoice
- Reduce likelihood of rejected or returned invoices due to missing or incorrect data
- Promotes a positive supplier experience
- Save time and money by eliminating cost due to paper invoices
- *And so much more...*

Step by step Tradeshift account activation

Activating your Account:

MAN has invited you to join Tradeshift, we have created an account in your name but the account needs to be activated before you can receive Purchase Orders.

In order to create your Tradeshift account you will have to take 5 simple steps:

Open
invite

Accept
invite

Create
account

Complete
profile

Invite team
members

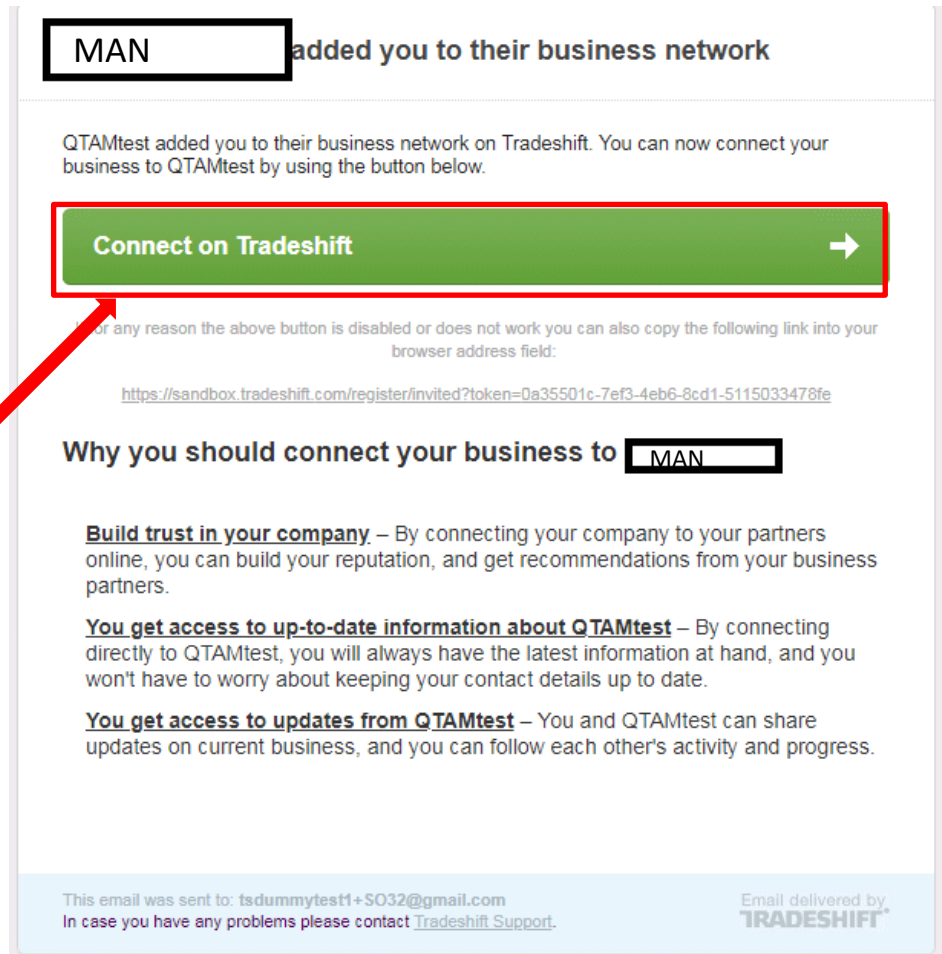
Step by step Tradeshift account activation

Step 1 (Open invite):

Check your email for the invitation to join Tradeshift. It will look similar to the email below.

Step 2 (Accept invite):

Click the **green** button to accept the invitation to join Tradeshift. This is the first step in linking your Tradeshift account to the MAN Tradeshift Account



MAN added you to their business network

QTAMtest added you to their business network on Tradeshift. You can now connect your business to QTAMtest by using the button below.

Connect on Tradeshift →

For any reason the above button is disabled or does not work you can also copy the following link into your browser address field:

<https://sandbox.tradeshift.com/register/invited?token=0a35501c-7ef3-4eb6-8cd1-5115033478fe>

Why you should connect your business to MAN

Build trust in your company – By connecting your company to your partners online, you can build your reputation, and get recommendations from your business partners.

You get access to up-to-date information about QTAMtest – By connecting directly to QTAMtest, you will always have the latest information at hand, and you won't have to worry about keeping your contact details up to date.

You get access to updates from QTAMtest – You and QTAMtest can share updates on current business, and you can follow each other's activity and progress.

This email was sent to: tsdummytest1+SO32@gmail.com
In case you have any problems please contact [Tradeshift Support](#).

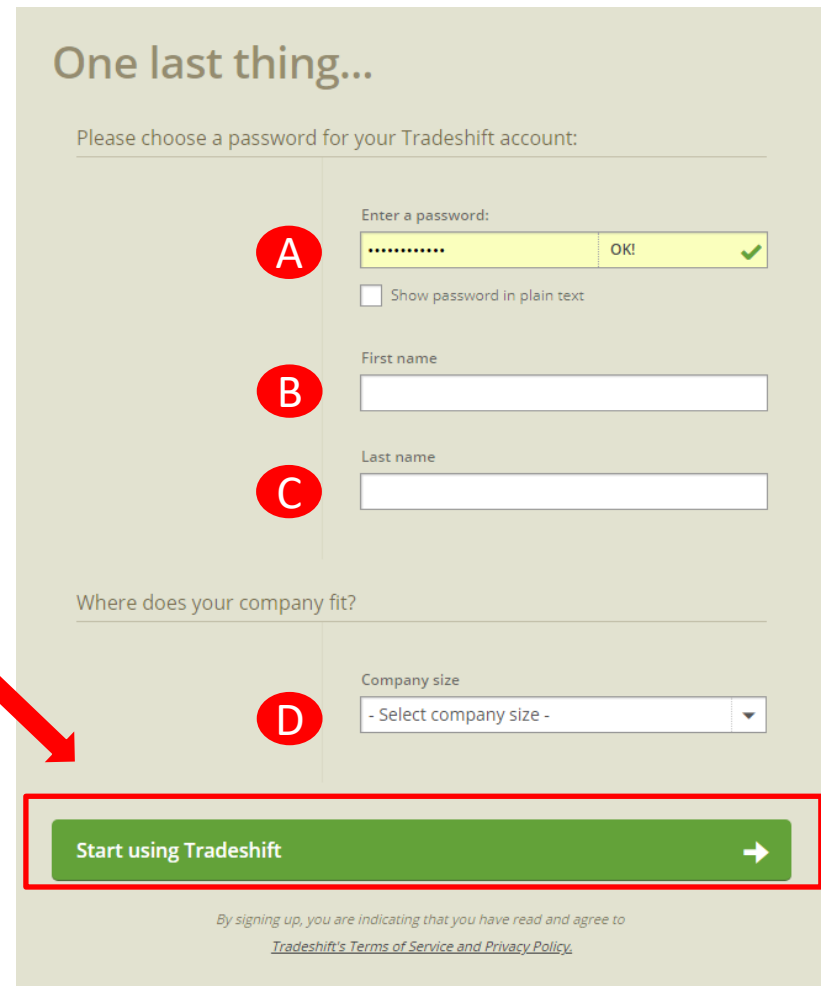
Email delivered by **TRADESHIFT**

Step by step Tradeshift account activation

Step 3 (Create user):

Click the **green** button to create your Tradeshift profile, which will trigger a confirmation e-mail but first you will have to set the followings:

- A. Password
- B. First name
- C. Last name
- D. (optional) Company size



The image shows a screenshot of the Tradeshift account activation form. The form is titled "One last thing..." and asks the user to "Please choose a password for your Tradeshift account:". The form contains four main sections, each marked with a red circle and a letter: A. Password, B. First name, C. Last name, and D. Company size. A red arrow points from the text "Click the green button to create your Tradeshift profile" to the "Start using Tradeshift" button at the bottom of the form. The button is green with a white right-pointing arrow. Below the button, there is a small line of text: "By signing up, you are indicating that you have read and agree to [Tradeshift's Terms of Service and Privacy Policy](#)."

One last thing...

Please choose a password for your Tradeshift account:

Enter a password: OK! ✓

☐ Show password in plain text

First name

Last name

Where does your company fit?

Company size

Start using Tradeshift →

By signing up, you are indicating that you have read and agree to [Tradeshift's Terms of Service and Privacy Policy](#).

Step by step Tradeshift account activation

Why am I getting an error and what does it mean?

Error1 : *Password doesn't match with email address*

- ✓ Solution: Click the “Forgot Password” link

Error2 : *An account with the same email address already exists*

- ✓ Tradeshift requires that every company account has to be made with an individual email address.
- ✓ Solution: If your e-mail address has already been used in a Tradeshift account, either use a new e-mail to associate to this new company account or log into your existing company profile and contact Tradeshift support to ensure that this account gets connected to the MAN account.

Step by step Tradeshift account activation

Step 4 (Complete profile):

Then you will be asked to enhance your profile with further information.

Users have the option to skip that for now however it is advised to complete it at this point.

The data fields are shown on the picture.

Your company profile is incomplete

Profile strength 10%

Update your profile below and make sure you're putting your best face forward!

COMPANY NAME

(Company name)

WEBSITE

Add URL

INDUSTRY

Select

COMPANY OWNERSHIP

Select

PHONE

Add phone

COMPANY DESCRIPTION

Tell the Tradeshift network about your company and attract more business

COMPANY SIZE

Select

COMPANY ADDRESS

US

COMPANY EMAIL ADDRESS

Add company email

NO THANKS

UPDATE PROFILE

Step by step Tradeshift account activation

Step 5 (*Invite team members*):

Lastly you will have the opportunity to invite your team members/ colleagues

Users have the option to skip that for now however if you already all the future users it is advised to set that up now.

You will need the e-mail address of the team member and you have to select his/her role

Invite your team members!

You can invite colleagues to join and use Tradeshift with you.

EMAIL

ROLE

Admin



EMAIL

ROLE

Admin



EMAIL

ROLE

Admin

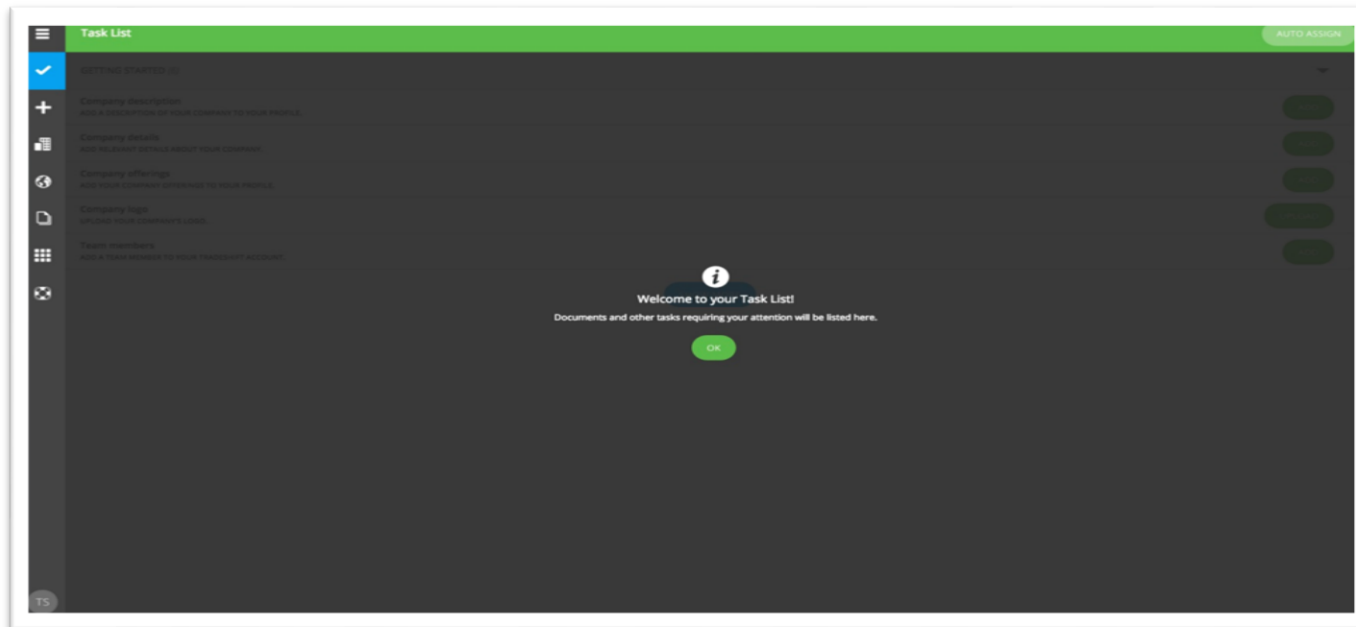


NO THANKS

SEND INVITE

Step by step Tradeshift account activation

If the next screen you see is this, **congratulations!**



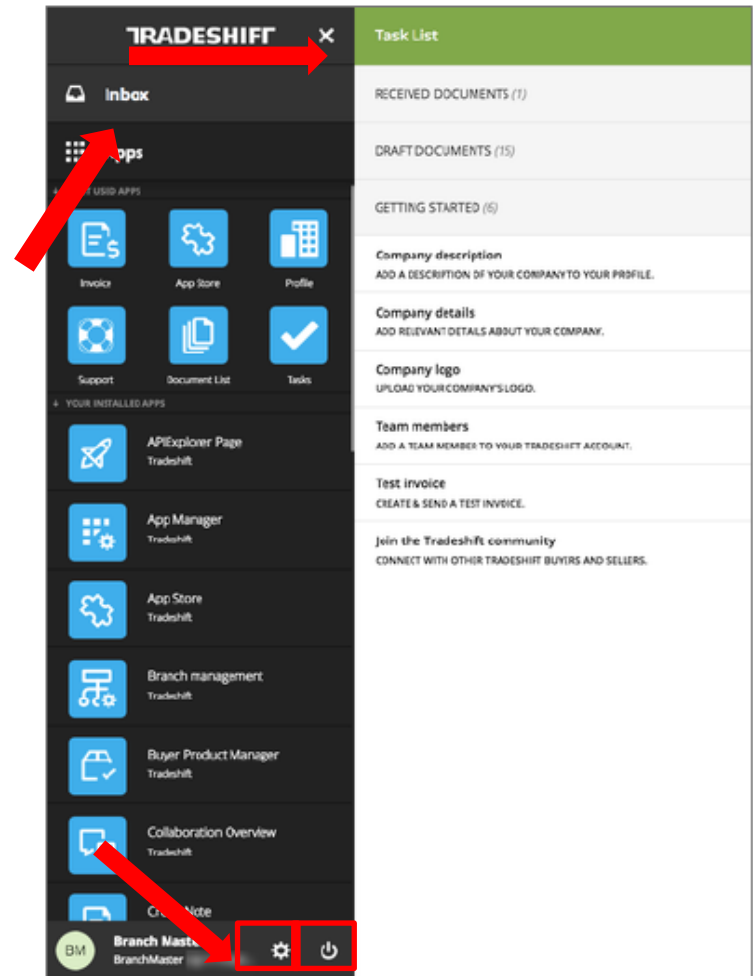
You are now ready to start invoicing with Tradeshift, you will receive a confirmation e-mail with details on getting started. If you want to start using the portal, you can do so immediately.

Getting started with the Tradeshift environment

The next screen leads you to the user interface with the **task** list as a default which is showing you all outstanding tasks assigned to you including any workflow approvals.

From here you can access your **inbox** which contains your messages.

You can also edit your **user credentials** or **logout** using the buttons on the bottom of the screen



Getting started with the Tradeshift environment

Most importantly you can toggle amongst the available **applications** and of course activate new ones.

By default you should find a couple apps there already:

Profile, People and **Network** to modify account settings and users and connections

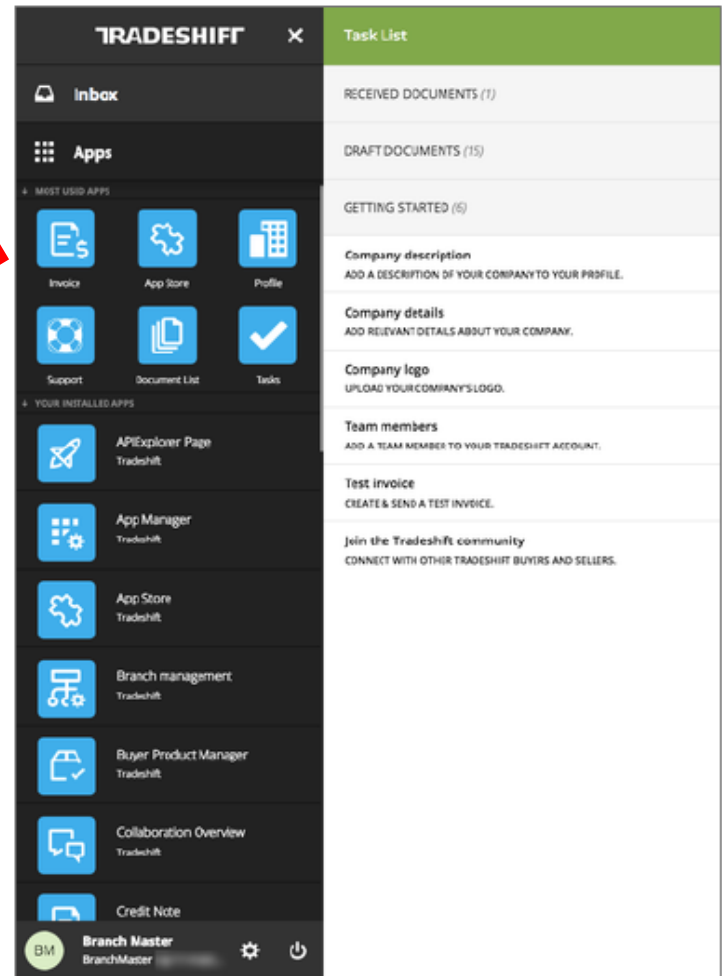
Invoice, Purchase order, Quote to be able to transact on the platform

Document list and manager to manage documents

Support in case you need further help

App Store where you can activate further applications

*Specific apps will be described later

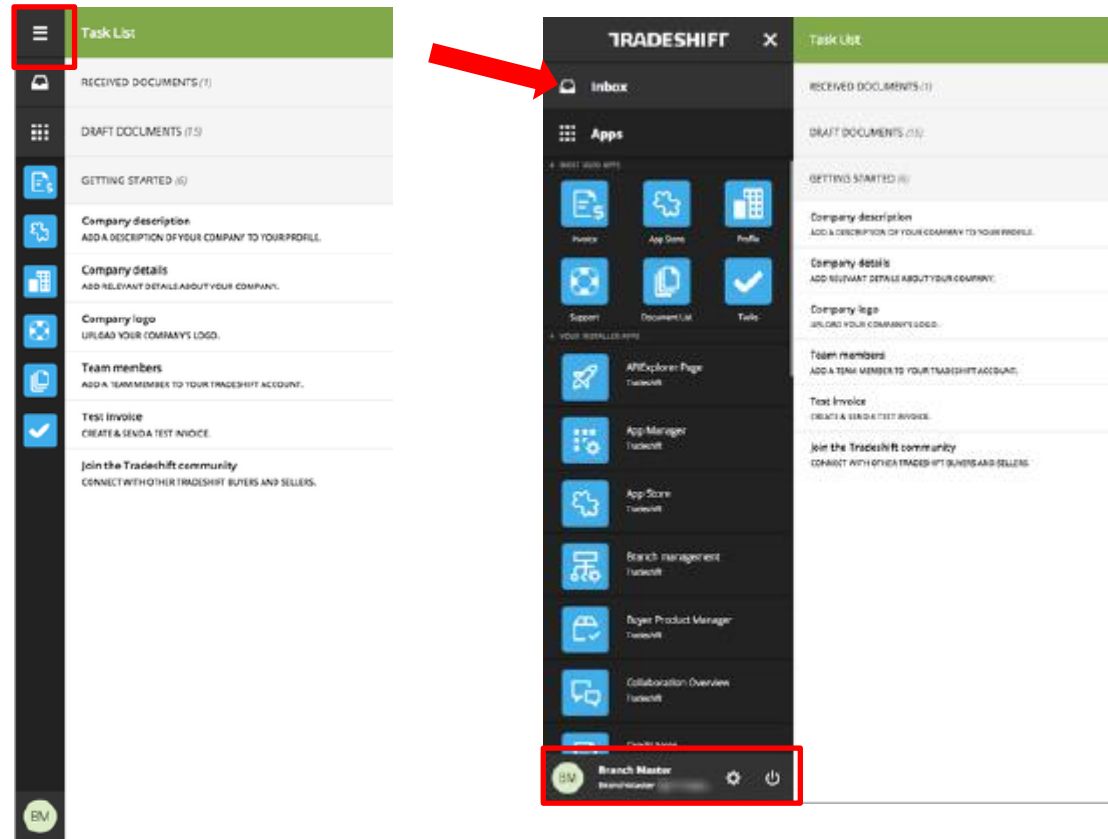


Getting started with the Tradeshift environment

The interface panel collapses by itself to free-up more space on the screen.

If you want to open it again you can do that by clicking on the circled button.

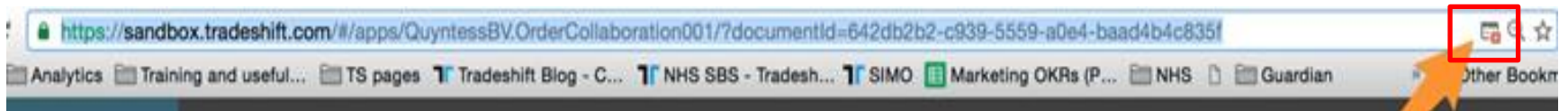
On the bottom you can then see which user you are logged in as.



Getting started with the Tradeshift environment

Popups:

Your system may be set up with pop-up blockers, in order to get to the invoice screen, you will have to allow pop-ups from Tradeshift. To accept the “pop-ups” click on the “pop-up icon” in the address bar, change the settings to allow pop ups from Tradeshift.



Browser version:

Tradeshift supports Internet Explorer 9+, Safari 6+, shipping (latest release) Google Chrome and Mozilla Firefox.

Support:

Look at Frequently Asked Questions (FAQs) or visit our Support Desk for additional information.

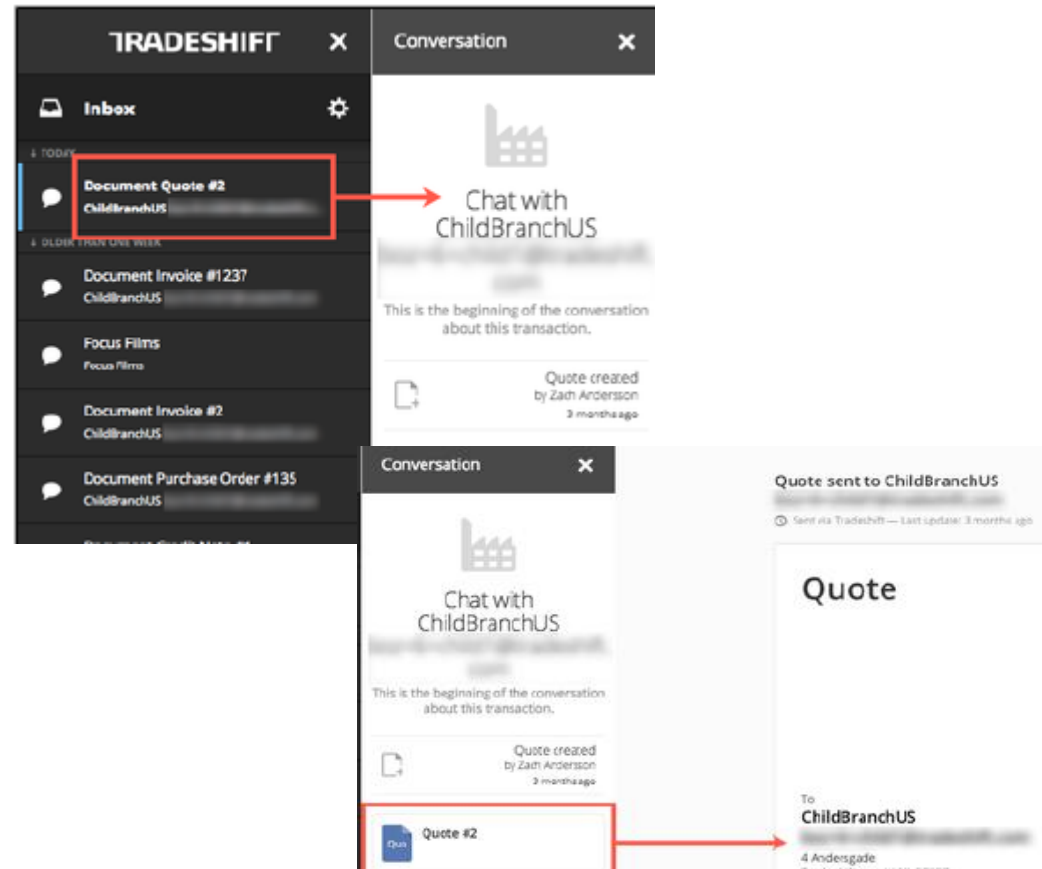
If you require any support regarding your Tradeshift account click [here](#).

Default applications and the standard functionality

The inbox:

Naturally the inbox contains the messages. They can be expanded and read fully by simply clicking on them. Note that individual users only see their messages while network owners can see everything that is linked to the account.

The user can user view documents sent via messages by once again simply clicking on them to open.

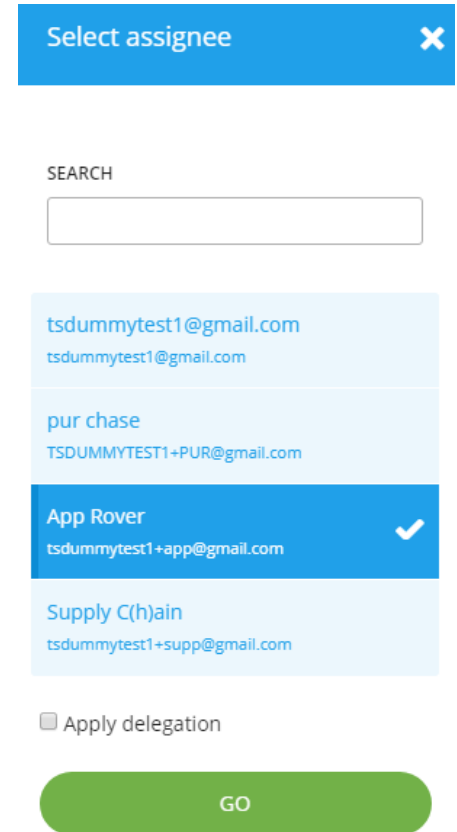
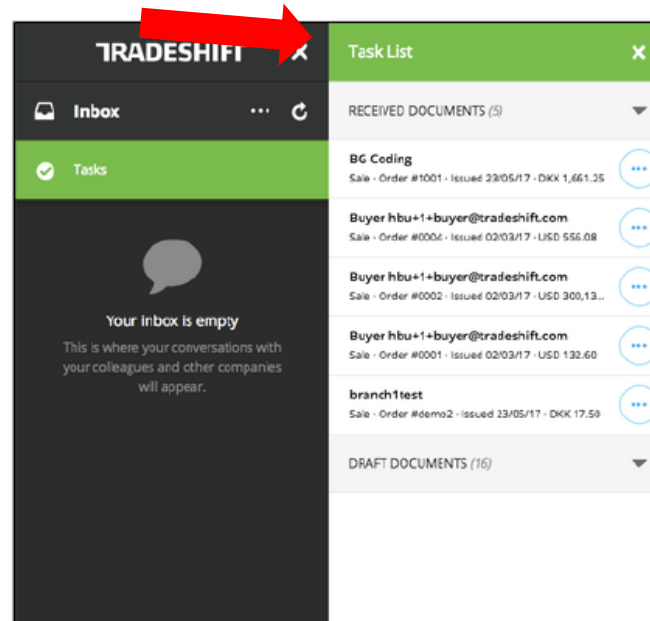


Default applications and the standard functionality

The Task list:

Here you may find your open tasks grouped appropriately. Note that a network owner may see ALL tasks while a general user will only see his or hers.

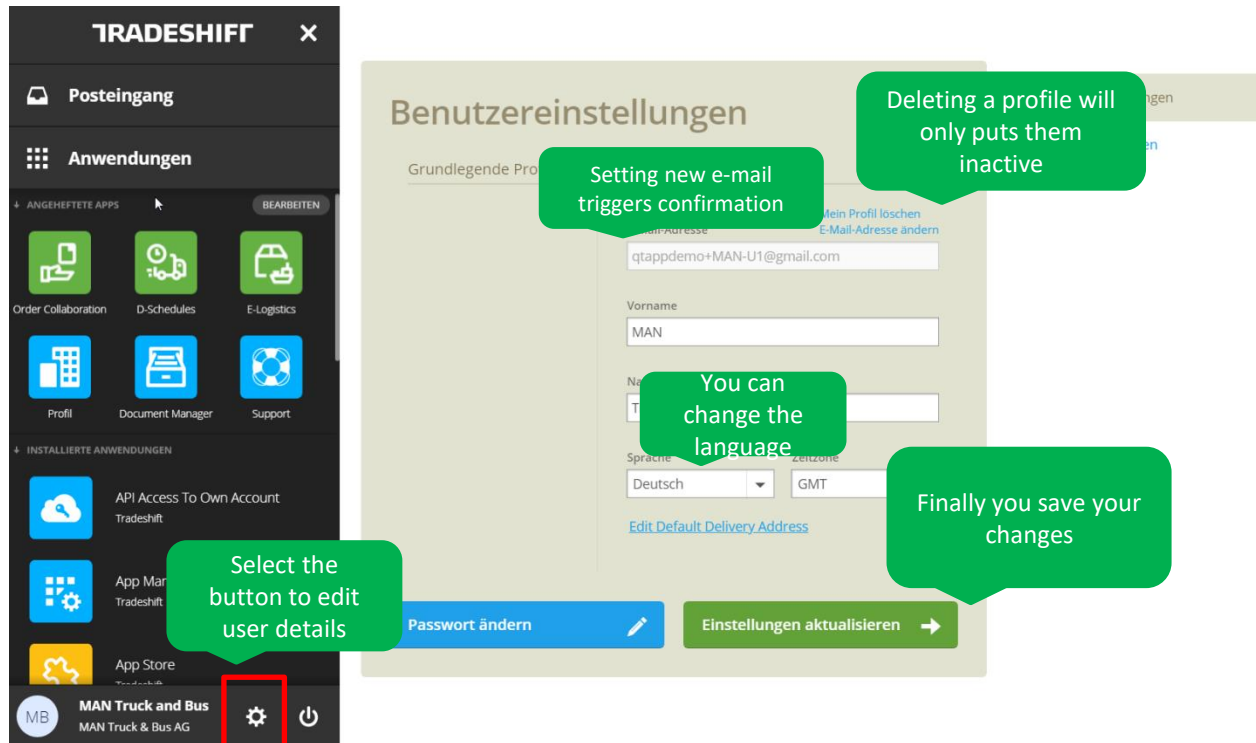
You can also delegate tasks to other team members and set it up that way that they receive all similar tasks in the future.



Default applications and the standard functionality

The User details:

This screen allows you to change your user credentials, software language and you can “delete” your profile



The image shows a mobile app interface for TRADESHIFT. On the left is a sidebar menu with options like 'Posteingang', 'Anwendungen', and 'ANGEHÄFTETE APPS'. The main screen displays 'Benutzereinstellungen' (User Settings) with fields for email, name, and language. Callouts provide instructions: 'Select the button to edit user details' points to a gear icon in the bottom bar; 'Setting new e-mail triggers confirmation' points to the email field; 'Deleting a profile will only puts them inactive' points to a 'Mein Profil löschen' link; 'You can change the language' points to the language dropdown; and 'Finally you save your changes' points to the 'Einstellungen aktualisieren' button.

TRADESHIFT X

Posteingang

Anwendungen

ANGEHÄFTETE APPS

BEARBEITEN

Order Collaboration D-Schedules E-Logistics

Profil Document Manager Support

INSTALLIERTE ANWENDUNGEN

API Access To Own Account Tradeshift

App Market Tradeshift

App Store

MAN Truck and Bus MAN Truck & Bus AG

Benutzereinstellungen

Grundlegende Profileinstellungen

E-Mail-Adresse [Mein Profil löschen](#) [E-Mail-Adresse ändern](#)

qtappdemo+MAN-U1@gmail.com

Vorname

MAN

Nachname

T

Sprache [Zeitzone](#)

Deutsch GMT

[Edit Default Delivery Address](#)

Passwort ändern

Einstellungen aktualisieren

Select the button to edit user details

Setting new e-mail triggers confirmation

Deleting a profile will only puts them inactive

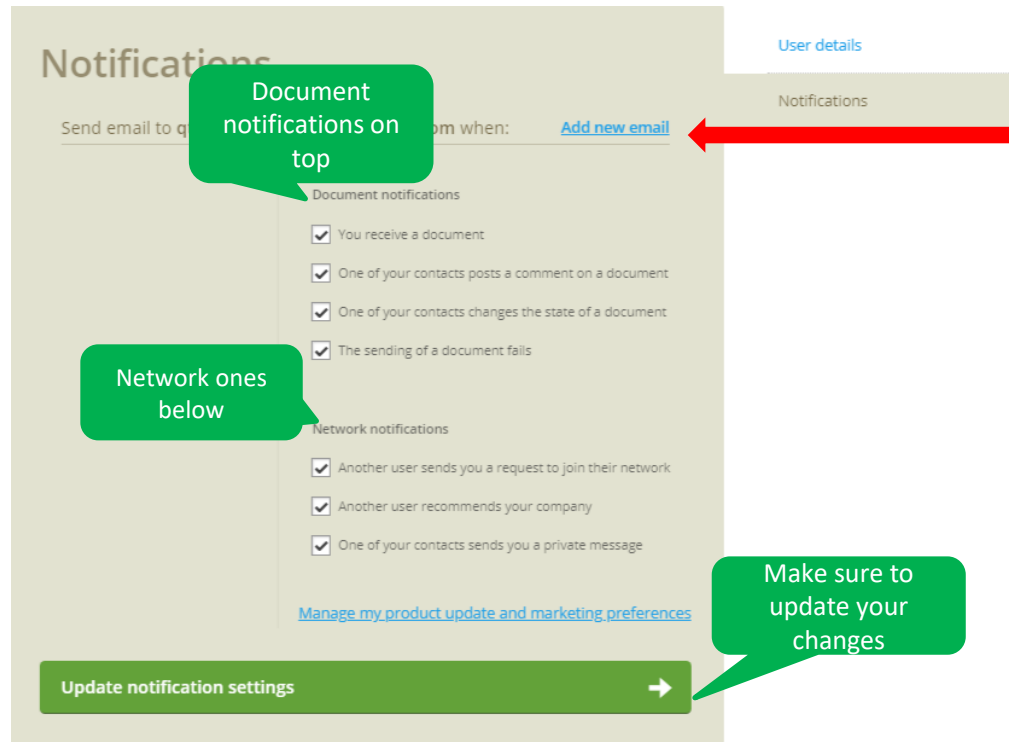
You can change the language

Finally you save your changes

Default applications and the standard functionality

The Notifications:

This is where you can set who receives general account notifications such as receiving documents, private messages and system messages



The screenshot shows the 'Notifications' settings page. At the top, there's a section for 'Send email to' with a link to 'Add new email'. Below this, there are two main categories of notifications: 'Document notifications' and 'Network notifications'. Each category has a list of checkboxes for different types of notifications. At the bottom, there's a green button labeled 'Update notification settings' with a right-pointing arrow. A red arrow points from the 'Add new email' link to a callout box on the right.

Document notifications on top

Network ones below

Make sure to update your changes

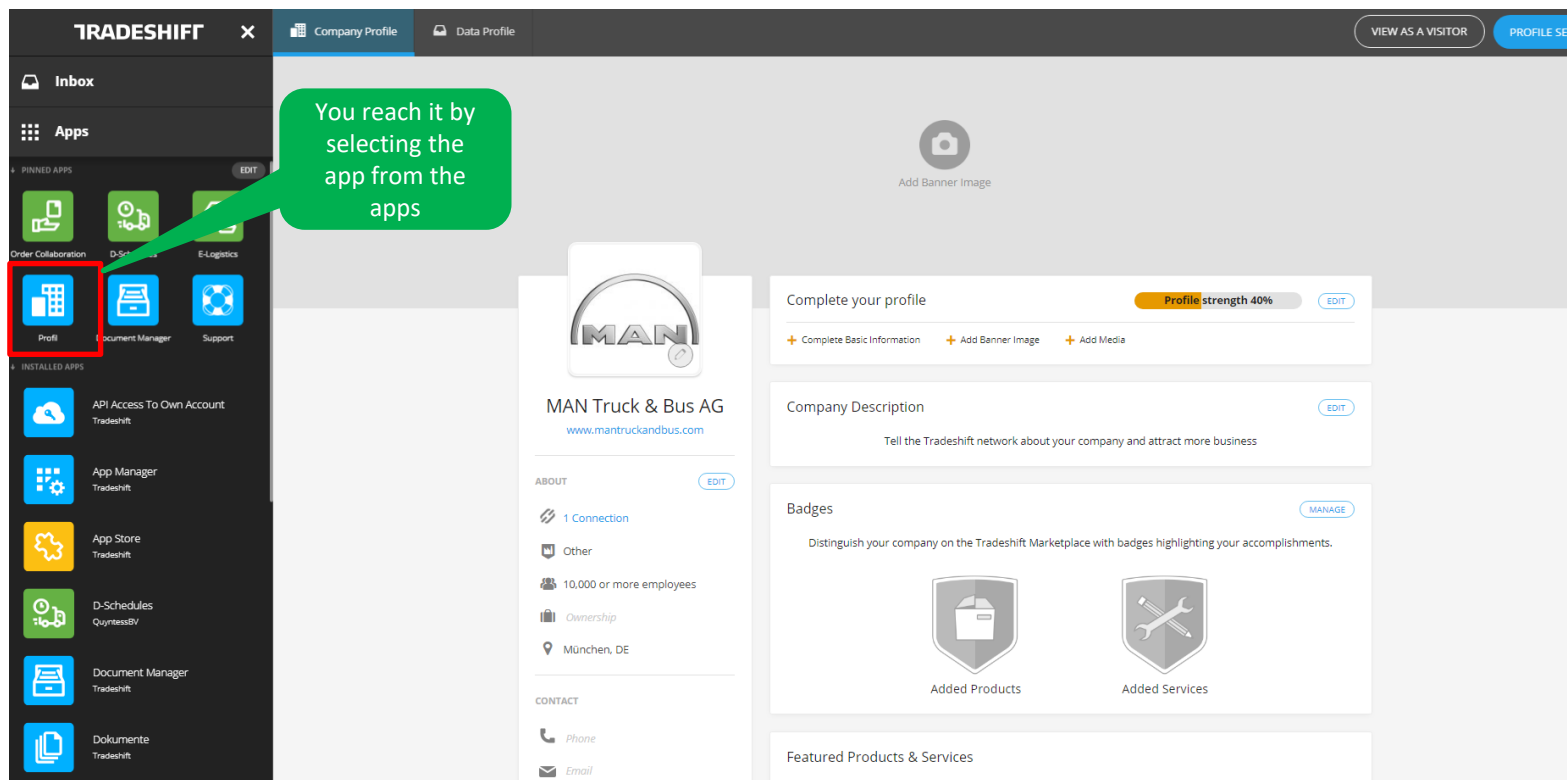
Add new email:

After adding additional recipients you can select which notifications he/she will receive

Default applications and the standard functionality

The Profile:

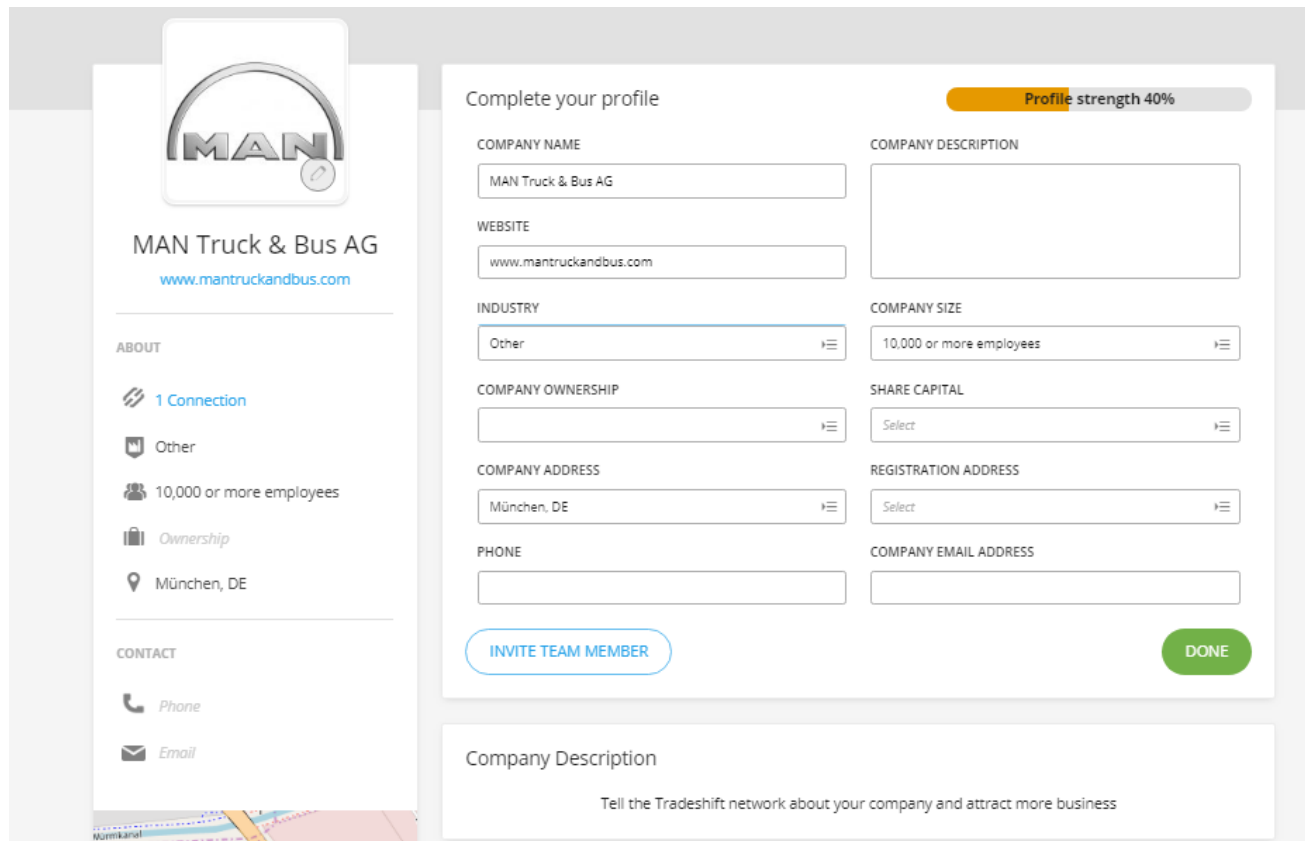
This is the app where you can maintain your company profile and all of its details



The screenshot displays the Tradeshift user interface. On the left sidebar, under the 'Apps' section, the 'Profile' app icon is highlighted with a red box. A green callout bubble points to this icon with the text: "You reach it by selecting the app from the apps". The main content area shows the 'Company Profile' for 'MAN Truck & Bus AG'. It includes a profile strength of 40%, a company description, and a list of badges for 'Added Products' and 'Added Services'. The sidebar also lists other installed apps like 'API Access To Own Account', 'App Manager', 'App Store', 'D-Schedules', 'Document Manager', and 'Dokumente'.

Default applications and the standard functionality

Here you can set up your logo, your company's general characteristics, invite team members and do a couple of other enhancements



The screenshot shows a user profile setup page for a company named MAN Truck & Bus AG. The profile is currently at 40% strength. The interface is divided into a left sidebar and a main content area.

Left Sidebar:

- Profile Header:** Displays the company logo (MAN Truck & Bus AG) and website (www.mantruckandbus.com).
- ABOUT:**
 - 1 Connection
 - Other
 - 10,000 or more employees
 - Ownership
 - München, DE
- CONTACT:**
 - Phone
 - Email

Main Content Area:

Complete your profile (Profile strength 40%)

COMPANY NAME <input type="text" value="MAN Truck & Bus AG"/>	COMPANY DESCRIPTION <input type="text"/>
WEBSITE <input type="text" value="www.mantruckandbus.com"/>	
INDUSTRY <input type="text" value="Other"/>	COMPANY SIZE <input type="text" value="10,000 or more employees"/>
COMPANY OWNERSHIP <input type="text"/>	SHARE CAPITAL <input type="text" value="Select"/>
COMPANY ADDRESS <input type="text" value="München, DE"/>	REGISTRATION ADDRESS <input type="text" value="Select"/>
PHONE <input type="text"/>	COMPANY EMAIL ADDRESS <input type="text"/>

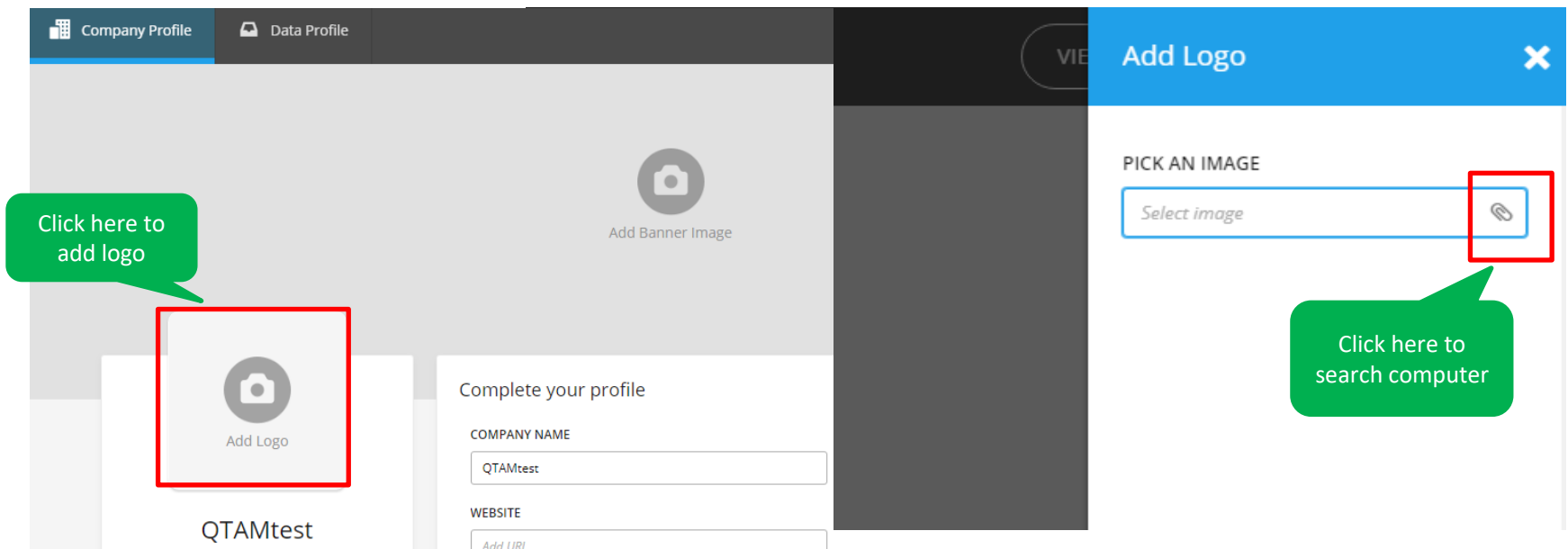
Buttons: INVITE TEAM MEMBER (blue), DONE (green)

Company Description: Tell the Tradeshift network about your company and attract more business

Default applications and the standard functionality

Company logo:

Adding a logo is rather important as it will be on **ALL** your Tradeshift documents



The screenshot displays the 'Company Profile' page in the Quyntess application. The page has a dark header with 'Company Profile' and 'Data Profile' tabs. The main content area is light gray and features a large 'Add Banner Image' button with a camera icon. Below this, there is a section titled 'Complete your profile' with input fields for 'COMPANY NAME' (containing 'QTAMtest') and 'WEBSITE' (with a placeholder 'Add URL'). A red box highlights the 'Add Logo' button, which also has a camera icon. A green callout bubble points to this button with the text 'Click here to add logo'. To the right, a blue 'Add Logo' modal is open, showing a 'PICK AN IMAGE' section with a text input field labeled 'Select image'. A red box highlights the file selection icon (a circle with a chain link) next to the input field. A green callout bubble points to this icon with the text 'Click here to search computer'.

Default applications and the standard functionality

General characteristics:

Consists of two main parts your company's generic features and it's unique identifiers

1

Complete your profile

Profile strength 40%

<p>COMPANY NAME</p> <input type="text" value="MAN Truck & Bus AG"/>	<p>COMPANY DESCRIPTION</p> <input type="text"/>
<p>WEBSITE</p> <input type="text" value="www.mantruckandbus.com"/>	
<p>INDUSTRY</p> <input type="text" value="Other"/>	<p>COMPANY SIZE</p> <input type="text" value="10,000 or more employees"/>
<p>COMPANY OWNERSHIP</p> <input type="text"/>	<p>SHARE CAPITAL</p> <input type="text" value="Select"/>
<p>COMPANY ADDRESS</p> <input type="text" value="München, DE"/>	<p>REGISTRATION ADDRESS</p> <input type="text" value="Select"/>
<p>PHONE</p> <input type="text"/>	<p>COMPANY EMAIL ADDRESS</p> <input type="text"/>

2

Company Identifiers

<p>TAX ID TYPE</p> <input type="text" value="Select"/>	
<p>COMPANY ID TYPE</p> <input type="text" value="Select"/>	
<p>CN TAX ID TYPE</p> <input type="text" value="Select"/>	
<p>STEUERNR.</p> <input type="text" value="E.g. 1234567890123"/>	<p>MWST-NR.</p> <input type="text" value="E.g. DE123456789"/>
<p>GLN</p> <input type="text" value="E.g. 1234567890123"/>	<p>INTERNAL IDENTIFIER</p> <input type="text" value="MAN"/>

You can set up your internal identifiers or use external ones as well

Dropdown bars keep data standards and also enhance user experience

Default applications and the standard functionality

Further profile enhancements:

You can further enrich your profile with badges, featured products but also display your certifications, recommendations and add media content

Badges

Distinguish your company on the Tradeshift Marketplace with badges highlighting your accomplishments.



Added Products



Added Services

Featured Products & Services

Showcase your best offerings on your profile and drive more business through Tradeshift Marketplace

ADD PRODUCTS

For example: Items on sale, special/limited offers

Certifications

MANAGE

Showcase your business credentials and qualifications

ADD CERTIFICATION

For example: ISO 9001, ISO 14001, C-TPAT, AEO

Recommendations

Companies with recommendations get more business on Tradeshift!

ASK FOR RECOMMENDATION

If you want you can also share media content

Media

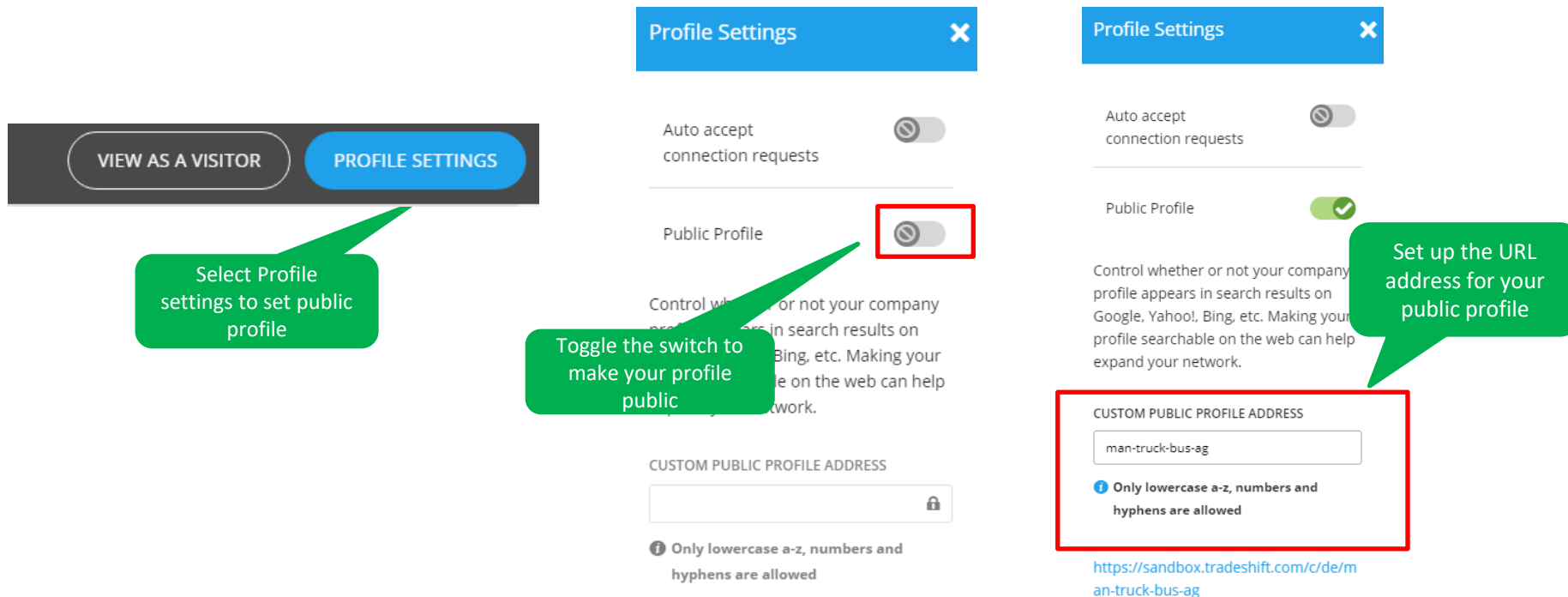
Add informational documents (PDFs, Movies, Images) for prospective buyers

ADD MEDIA

Default applications and the standard functionality

Public profile:

For expanding your network you can also make your profile public which then will make it appear using search engines such as Google or Bing



VIEW AS A VISITOR **PROFILE SETTINGS**

Select Profile settings to set public profile

Profile Settings ✕

Auto accept connection requests ☐

Public Profile ☒

Control whether or not your company profile appears in search results on Google, Yahoo!, Bing, etc. Making your profile searchable on the web can help expand your network.

CUSTOM PUBLIC PROFILE ADDRESS

Only lowercase a-z, numbers and hyphens are allowed

<https://sandbox.tradeshift.com/c/de/man-truck-bus-ag>

Profile Settings ✕

Auto accept connection requests ☐

Public Profile ☒

Control whether or not your company profile appears in search results on Google, Yahoo!, Bing, etc. Making your profile searchable on the web can help expand your network.

CUSTOM PUBLIC PROFILE ADDRESS

Only lowercase a-z, numbers and hyphens are allowed

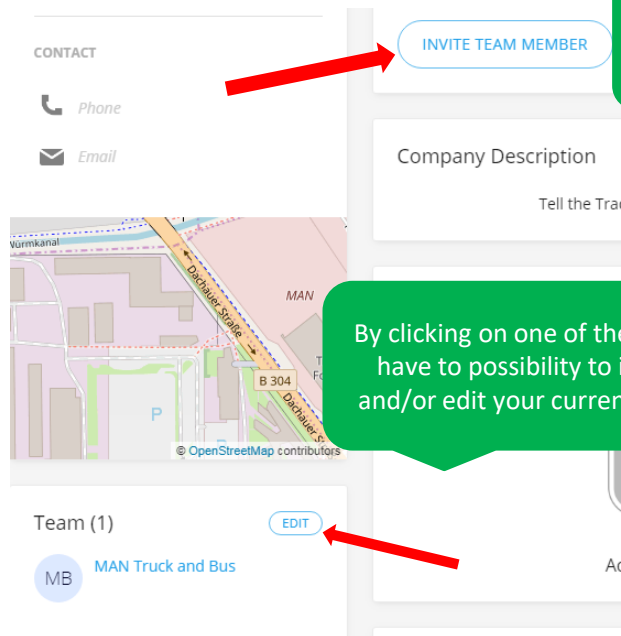
<https://sandbox.tradeshift.com/c/de/man-truck-bus-ag>

Set up the URL address for your public profile

Default applications and the standard functionality

Invite team members:

You can also add members from your organization to your profile who then will have access to the company account by simply typing in the e-mail address and clicking on the ADD USER button



CONTACT

Phone

Email

Company Description

Tell the Trai

Team (1)

MB MAN Truck and Bus

EDIT

By clicking on one of these you have to possibility to invite and/or edit your current team

As a user you can edit everything whereas as an admin you also have the chance to invite other users and edit the company profile

You can also define whether the new user will be shown on your profile or not

Add user

When registering they can fill the missing data themselves

EMAIL *

FIRST NAME

LAST NAME

TITLE

ROLE

User

SHOW ON COMPANY PROFILE?



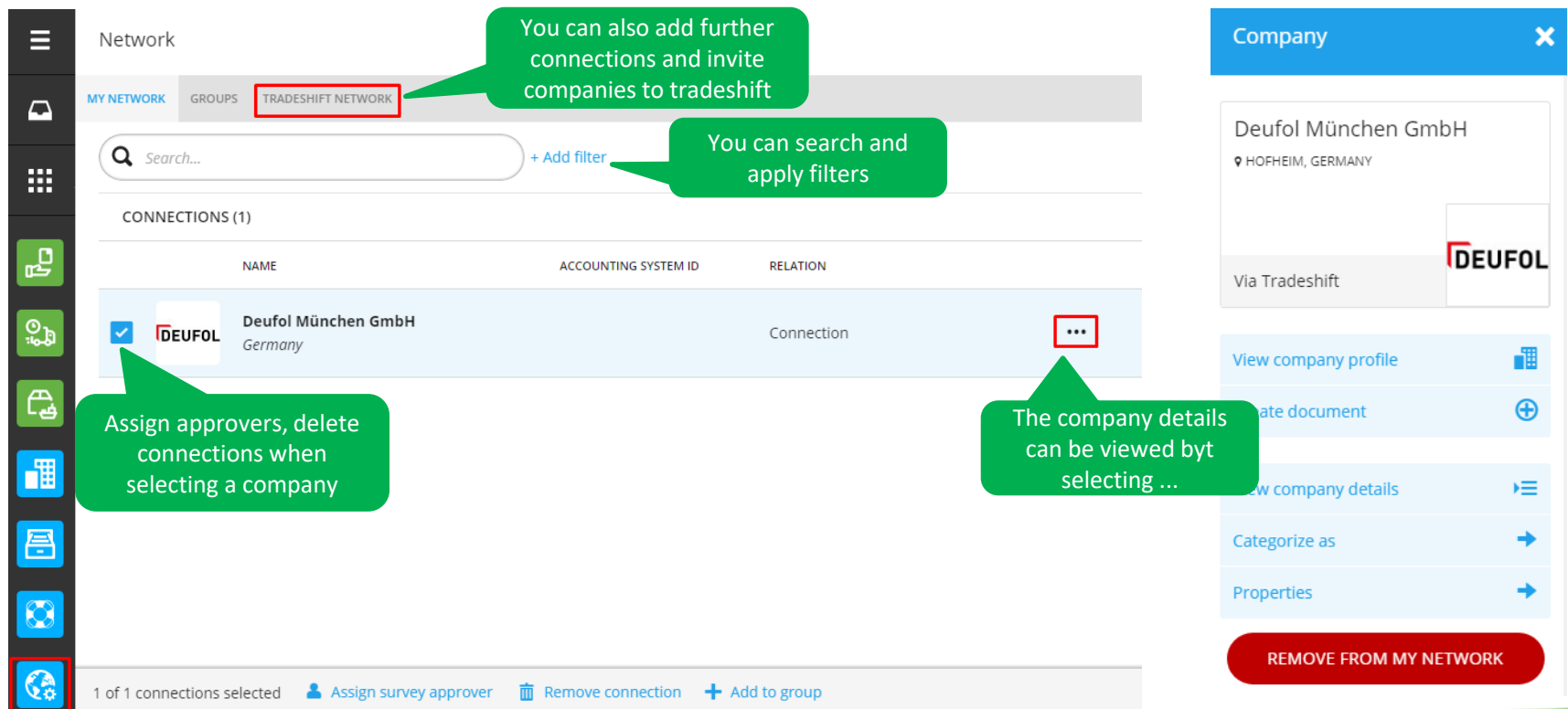
Yes, show on company profile

ADD USER

Default applications and the standard functionality

Viewing your network:

As a supplier you have to make sure that you are connected to the buyer organization to receive documents you just have to select the network app from the left side




The screenshot shows the 'Network' view in the Quyntess application. The left sidebar contains a menu with icons for various functions. The main area displays the 'TRADESHIFT NETWORK' tab, which is highlighted with a red box and an annotation: 'You can also add further connections and invite companies to tradeshift'. Below this is a search bar with the text 'Search...' and a '+ Add filter' button, with an annotation: 'You can search and apply filters'. The 'CONNECTIONS (1)' section shows a table with one entry: 'Deufol München GmbH Germany' with a 'Connection' relation. The entry is highlighted with a blue box and an annotation: 'Assign approvers, delete connections when selecting a company'. To the right of the entry is a red box containing three dots, with an annotation: 'The company details can be viewed by selecting ...'. The bottom of the main area shows '1 of 1 connections selected' and buttons for 'Assign survey approver', 'Remove connection', and '+ Add to group'. On the right side, a 'Company' panel displays details for 'Deufol München GmbH' and a list of actions: 'View company profile', 'Create document', 'View company details', 'Categorize as', and 'Properties'. A red button at the bottom right says 'REMOVE FROM MY NETWORK'.

Network

MY NETWORK GROUPS TRADESHIFT NETWORK

Search... + Add filter

CONNECTIONS (1)

NAME	ACCOUNTING SYSTEM ID	RELATION
<input checked="" type="checkbox"/>  Deufol München GmbH Germany		Connection

Assign approvers, delete connections when selecting a company

The company details can be viewed by selecting ...

Company

Deufol München GmbH
HOFHEIM, GERMANY

Via Tradeshift

View company profile

Create document

View company details

Categorize as

Properties

REMOVE FROM MY NETWORK

1 of 1 connections selected Assign survey approver Remove connection + Add to group

Default applications and the standard functionality

Document list:

Naturally this is an overview of all your sent and received documents where you can search, sort, filter or view them and navigate to particular order, forecast or shipment in the respective apps just get more information on them

Documents							
<input type="text"/> Show Insights SORT: LAST MODIFIED ADD FILTER							
TYPE	DOCUMENT ID	STATUS	SENDING PARTY	RECEIVING PARTY	STATUS MESSAGE	ACTIONS	AMOUNT
PO	Order 4501326384 ISSUED 30/08/18	SENT	MAN Truck & Bus AG	Deufol München GmbH	-	View Transaction	6870.00
ASN	Shipment Notice SHP000004580 ISSUED 07/09/18	RECEIVED	Deufol München GmbH	MAN Truck & Bus AG	-	View Transaction	
PO	Order 20160822-4 ISSUED 03/08/16	SENT	MAN Truck & Bus AG	Deufol München GmbH	-	View Transaction	
PO	Order 4501326384 ISSUED 30/08/18	VOIDED	MAN Truck & Bus AG	Deufol München GmbH	-	View Transaction	
PO	Order 4501326384 ISSUED 30/08/18	VOIDED	MAN Truck & Bus AG	Deufol München GmbH	-	View Transaction	
PO	Order 20160822-5 ISSUED 25/04/18	SENT	MAN Truck & Bus AG	Deufol München GmbH	-	View Transaction	

Add Filter

- Transaction type
- Document type
- Status
- Copy indication
- Date created
- Date issued
- Total value
- Archived documents

Default applications and the standard functionality

Sorting and filtering:

Different roles are usually interested in different types of documents or would like to view them with a different purpose which is enabled by numerous sorting and filtering methods and attributes

You have several options to just quickly sort them

Sort by... ×

Last modified	▶
Issue date	▶
Due date	▶
Value	▶
Document type	▶

Add Filter ×

Transaction type	▶
Document type	▶
Status	▶
Copy indication	▶
Date created	▶
Date issued	▶
Total value	▶
Archived documents	▶

You can select preset filters or add new one

Default applications and the standard functionality

Additionally:


You can preview the documents, if open them at the source or just simply get more information regarding them

Purchase Order **4501326384**

SUPPLIER **DEUFOL MÜNCHEN GMBH** · BUYER **MAN TRUCK & BUS AG** · STATUS **CONFIRMED** 

If it's sent in QT
app opens in the
respective app

Document Options


PO

ORDER TO
Deufol München GmbH
SENT

ID/NUMBER

4501326384

CURRENCY

EUR

ISSUED

2018-08-30

TOTAL:

EUR 6,870.00

Download document

Manage access

Archive document

OPEN DOCUMENT

You can still
download- archive
the document