

Sending an invoice via the Portal

Once you have registered and have an Accepted Connection for the NHS Org you wish to invoice please see the following steps for sending your first invoice:

Step One: Log into your account

Step 2: Check your Settings – click on your name black panel to open your settings.

The screenshot shows a web browser window displaying the Tradeshift portal. The browser's address bar shows the URL <https://sandbox.tradeshift.com/#/tasks/tradeshift.TaskList/>. The page has a dark sidebar on the left with the Tradeshift logo and navigation options: Tasks, Create, Profile, Network, Documents, Apps, Switch to..., and Get Help. At the bottom of the sidebar, the user's profile is visible, showing the initials 'KT' and the name 'Kelly Thomas' with 'KELLY THOMAS' below it. A red arrow points from the 'Tasks' header in the main content area to the user's name in the sidebar. The main content area has a green header 'Tasks' and a list of draft documents under the heading 'DRAFT DOCUMENTS (28)'. The list includes several entries, such as 'Unknown recipient' with invoice numbers and amounts, and 'OFFICIAL TEST ACCOUNT ASHFORD & ST PETERS HOSPITALS NHS FT (RTK)'. A 'SHOW MORE' button is located at the bottom of the list. Below the list is a section titled 'GETTING STARTED (2)'. The Windows taskbar is visible at the bottom of the screen.

Under **User details** ensure the language is set as English UK

The screenshot displays the 'User details' page in a web browser. The page title is 'User details' and the subtitle is 'Basic details for your Tradeshift account'. The main content area contains several input fields: 'Email address' (kelly.thomas1@nhs.net), 'First name' (Kelly), and 'Last name' (Thomas). Below these are two dropdown menus: 'Language' (set to 'English (UK)') and 'Time zone' (set to 'GMT'). A red arrow points to the 'Language' dropdown. At the bottom of the form are two buttons: 'Change password' and 'Save changes'. To the right of the form is a profile picture of a fox and a sidebar with links for 'User details', 'Company details', 'Company logo', 'Public profile', and 'Notifications'. The browser's address bar shows the URL: https://sandbox.tradeshift.com/#/apps/Tradeshift.Settings/G/account?execution=e3e1. The Windows taskbar at the bottom shows various open applications and the system clock at 10:47.

Then go to **Company Details** - Please ensure your company name and address details are shown here.

Company details

Registration details

Your company name will appear on Invoices and other business documents you send.

Company name *
Invoices for GP Surgery Kelly Thomas

Building name
[Empty field]

Number Street *
200 Demonstration Street

Locality name
[Empty field]

Town *
Cardiff

County
[Empty field]

Postcode *
CF1 4DE

User details

Company details

Company logo

Public profile

Notifications

Your company/supplier name and address

Continued....

TRADESHIFT

Tasks

Create

Profile

Network

Documents

Apps

Switch to...

Get Help

KT Kelly Thomas

Other company identifiers (optional)

VAT Reg. No.

Company ID type/name

Company number

GLN [What is a GLN?](#)

Tax ID name/type

Internal identifier

Kelly2

Network options

Auto accept any new contact requests

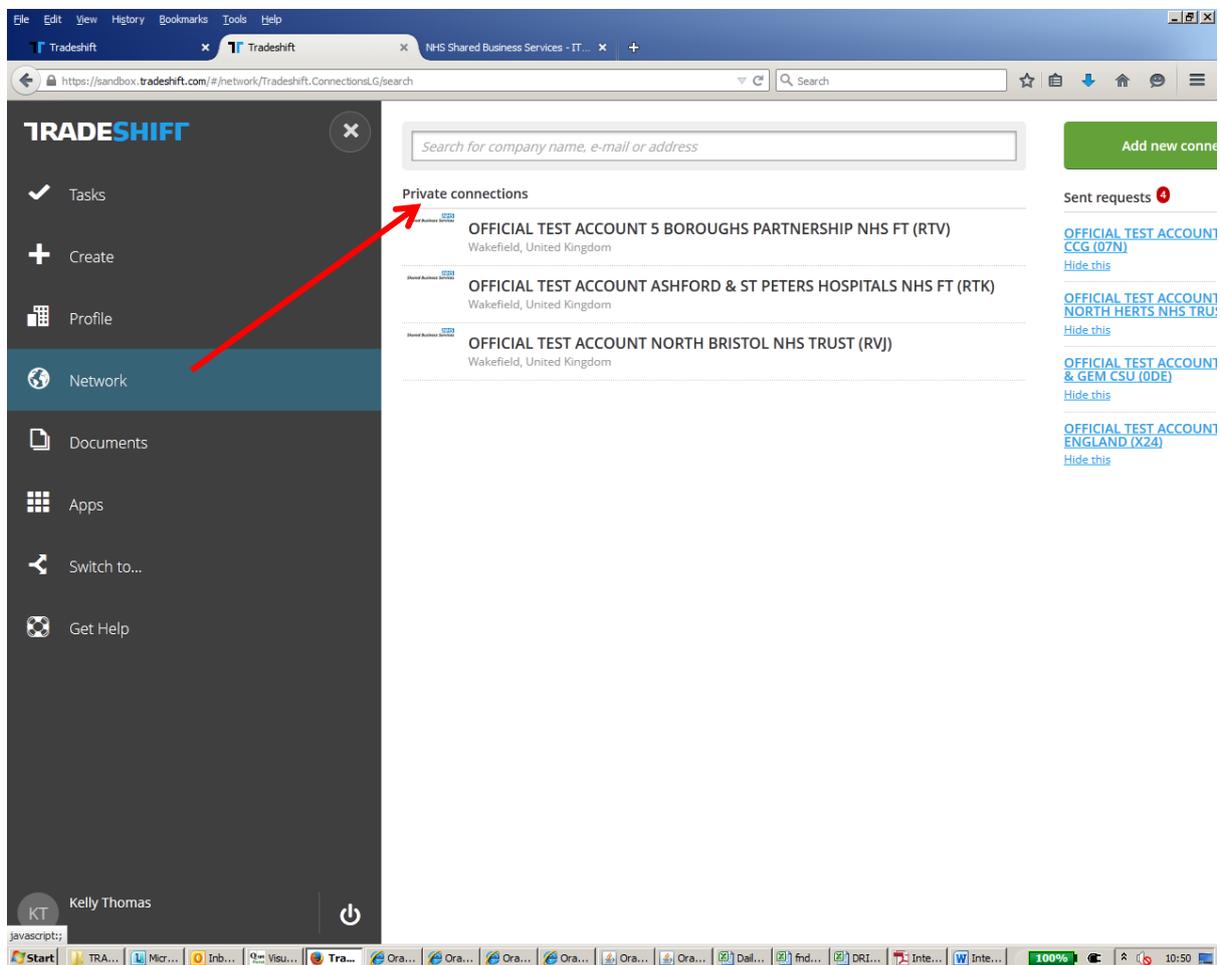
Save changes

Save Changes

Be sure to scroll down to the VAT number and company registration number and enter if applicable.

Step 3: Go to your Network Tab. In the Centre panel under Private Connections it will list your connections to the NHS Organisations (it will have the org code denoted at the end and it will say Wakefield United Kingdom). **CLICK ON THE REQUIRED CONNECTION.**

(the example is from my test account so does not show the same connections as you)



Step 4: Clicking on the connection will bring up a panel down the Right hand side. If it says Type: TRADESHIFT CONTACT this means you are correctly connected and you are now ready to create your invoice. You can then click in the GREEN button to create your invoice.

The screenshot shows a web browser window with the Tradeshift interface. On the left, there is a search bar and a list of 'Private connections'. The first connection is highlighted: 'OFFICIAL TEST ACCOUNT 5 BOROUGH PARTNERSHIP NHS FT (RTV) Wakefield, United Kingdom'. On the right, a 'Company details' panel is open for this connection. It features the NHS Shared Business Services logo and a green 'Create...' button. Below the logo are buttons for 'Send message', 'Recommend', 'Request Recommendation', and 'View profile'. At the bottom of the panel, there is a table of details:

TYPE	Tradeshift contact
VAT REG. NO.	654949292
PAYABLES CODE	B255
ADDRESS	Topcliffe Lane Phoenix House Wakefield WF3 1WE United Kingdom Show map
DELIVERY	Your documents will be delivered using the Tradeshift network
PROPERTIES	Edit

At the bottom of the panel is a 'Disconnect' link. A red arrow points from the 'Create...' button to the 'TYPE' field in the details table, which contains the text 'Tradeshift contact'. Another red arrow points from the 'TYPE' field to the 'Create...' button.

NB - (If it states manual contact – please email nhs.sbs.support@tradeshift.com and request connection to the NHS Organisation you need to invoice)

Alternatively, click on your Create Tab – Invoice, which will also bring up the template. You can then search for the organisation you wish to invoice from the drop down.

The screenshot shows the Tradeshift web application interface for creating an invoice. On the left, a blue sidebar contains a 'Create documents' menu with options: Invoice, Credit note, Quote, and Purchase Order. A red arrow points to the 'Invoice' option. The main content area is titled 'Create Invoice' and includes a search dropdown for the recipient, labeled 'To', with the placeholder text 'Search for company name, e-mail or address'. Another red arrow points to this dropdown. To the right of the search field are input fields for 'Invoice number' (12435672773), 'Issue date *' (25/08/15), 'Payment due date', and 'Delivery date'. Below these is a table for invoice items with columns: Item ID, Description, Quantity, Unit, Price per unit excl. tax, Tax %, and Total. A table with one row is visible, showing a unit of 'pcs' and a tax rate of '0%'. At the bottom right, there is a 'Total GBP' field. The browser's address bar shows the URL: https://sandbox.tradeshift.com/#/create/Tradeshift.Invoice.G/create?execution=e5s1. The Windows taskbar at the bottom shows various open applications and the system clock at 10:53.

Step 5: This will bring up an invoice template which you can complete as you would a paper invoice. Key in your own invoice number, date etc as you would your paper template.

The screenshot shows the Tradeshift invoice creation page. The recipient information is pre-filled:

To
OFFICIAL TEST ACCOUNT 5 BOROUGH PARTNERSHIP
NHS FT (RTV)
 Topcliffe Lane
 Phoenix House
 Wakefield
 WF3 1WE
 United Kingdom

VAT Reg. No.: 654949292
 Org. Code: RTV
 Payables Code: B255
[Change recipient](#)

Invoice number * Last used: 1243567

Issue Date * Currency

PO number or XX Reference

[Add optional field](#)

Item ID	Description	Quantity	Unit	Price per unit excl. tax	Tax %	Total excl. tax
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="pcs"/>	<input type="text"/>	<input type="text" value="0%"/>	0.00

[Add new line](#) [Add discount or charge \(e.g. freight\)](#)

Subtotal excl. taxes 0.00
Total GBP 0.00

[Set delivery address](#) Write a message to the recipient

You should see the full address populated for the Organisation you are invoicing.

Invoice number should be capital letters or numbers. No spaces or special characters

You can enter a PO number here if you have been given one or the name of your NHS contact in the format XXInitialSurname. Eg XXJBLOGGS (use capital letters no spaces)

Enter your invoice details here – click + to add additional lines

Item ID could be the product number or date of the service

Please enter your phone no and email in case the NHS Org has a query and any other details relevant to your invoice. Click the box to save for future invoices so you do not have to type each time.

Remember to click into the VAT box – this will open a side the correct VAT rate by clicking panel for you to select the correct VAT rate

Step 6: Add any attachments or backing documents you want to send with your invoice – attachments must be PDF, gif, tiff, png or jpeg.

Click on PREVIEW button to see the image that will be viewed by the NHS Organisation and make sure you are happy with your invoice. If you have entered any fields incorrectly they will be highlighted so you can correct. If you are happy then press the GREEN send button. The invoice will then show as Sending and then SENT

Item ID	Description	Quantity	Unit	Price per unit excl. tax	Tax %	Total excl. tax
01.08.15	Appraisal 1	2	pcs	50.00	0%	100.00
05.08.15	Appraisal 2	1	pcs	60.00	0%	60.00

Subtotal excl taxes: 160.00
VAT Exempt 0% of 160.00 GBP: 0.00
Total GBP: 160.00

Write a message to the recipient
Contact 0117 956 8978 in case of query or email kelly.thomas1@nhs.net

Save notes for future invoices

Only PDFs, TIFF, JPEG, PNG, GIF files are accepted formats. Please resubmit your attachment in one of these formats.

Choose File

Max file size is 3000 kb

Preview Send

You can add any attachments or backing documents or add your invoice as the backing document (be sure you use the same invoice number, invoice date etc)

Example of the PDF the NHS Organisation will see

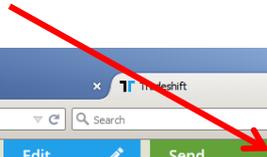
The screenshot shows a web browser window with the Tradeshift application. The URL is <https://sandbox.tradeshift.com/#/create/Tradeshift.Invoice.G/create?execution=e766>. The page has a navigation bar with 'Edit' and 'Send' buttons. The main content area is titled 'Invoice' and includes a fox image. The invoice details are as follows:

To	From	Invoice number
OFFICIAL TEST ACCOUNT 5 BOROUGHES PARTNERSHIP NHS FT (RTV) Topcliffe Lane Phoenix House Wakefield WF3 1WE United Kingdom VAT Reg. No. : 654949292 Org. Code : RTV Payables Code : B255	Invoices for GP Surgery Kelly Thomas 200 Demonstration Street Cardiff CF1 4DE United Kingdom	AUGUSTAPR08 Issue Date: 25/08/15 Currency: GBP PO number or XX Reference: XXJBLOGGS

Item ID	Description	Quantity	Unit	Unit price	Tax	Total GBP excl. taxes
01.08.15	Appraisal 1	2	pcs	50.00	0%	100.00
05.08.15	Appraisal 2	1	pcs	60.00	0%	60.00
Subtotal excl. taxes						160.00
VAT Exempt 0% of 160.00 GBP						0.00
Total GBP						160.00

Delivery address: _____ Notes: _____

Preview of my invoice. If every thing is ok – click SEND



The screenshot shows the Tradeshift web application interface. On the left is a dark sidebar with navigation options: INVOICES FOR GP SURGERY KELLY THOMAS, Tasks, Profile, Connections, DOCUMENTS (Create..., Invoice), Credit Note, Documents, APPS (Explore Apps, My Apps), SUPPORT (Get Help), and KELLY THOMAS (Switch To..., Settings, Logout). The main content area displays an invoice preview. At the top right of this area are 'Edit' and 'Send' buttons. The invoice title is 'Invoice'. Below it is a photo of a fox. The 'To' and 'From' information is as follows:

To	From
OFFICIAL TEST ACCOUNT 5 BOROUGHES PARTNERSHIP NHS FT (RTV) Topcliffe Lane Phoenix House Wakefield WF3 1WE United Kingdom VAT Reg. No. : 654949292 Org. Code : RTV Payables Code : B255	Invoices for GP Surgery Kelly Thomas 200 Demonstration Street Cardiff CF1 4DE United Kingdom

Invoice details:

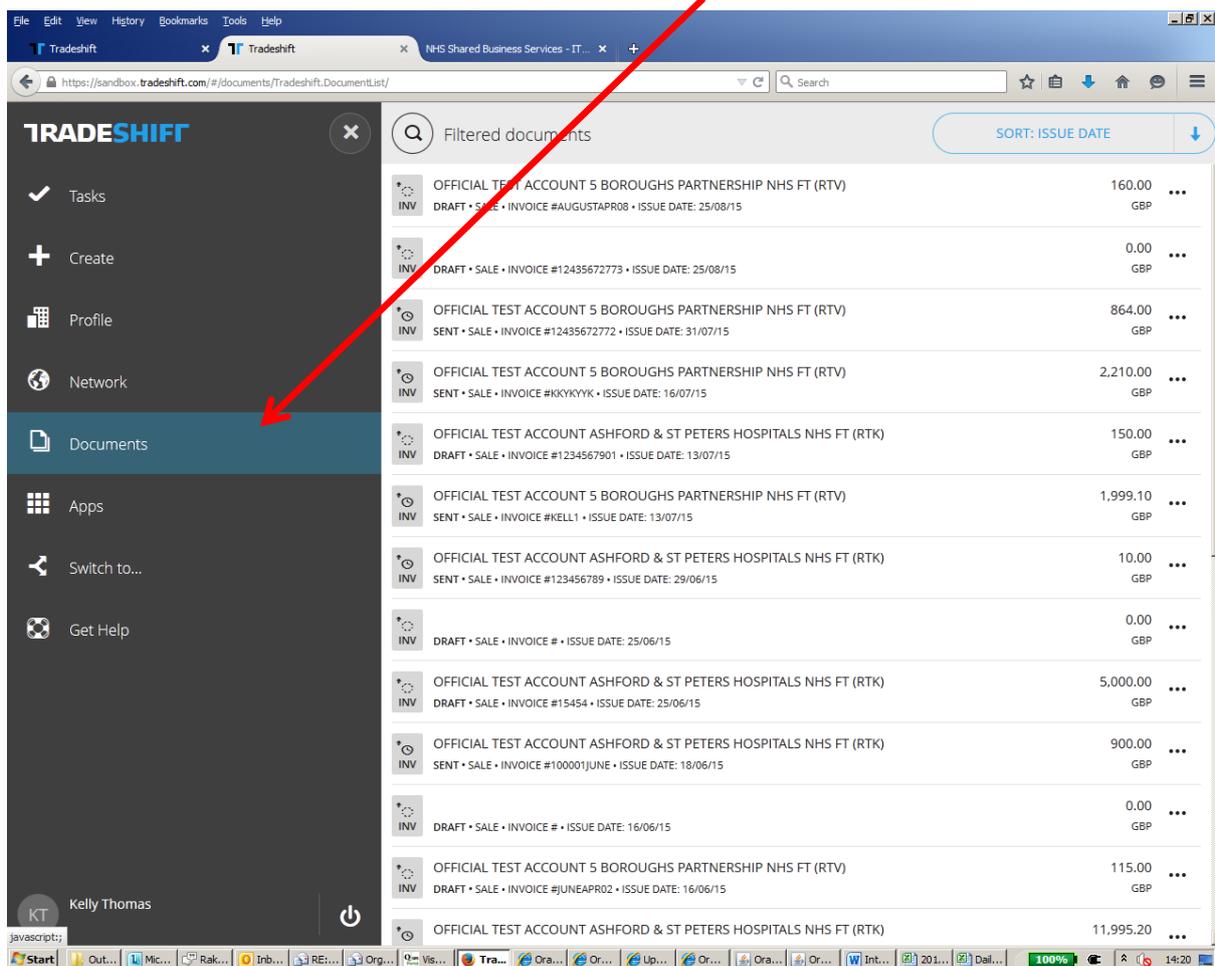
Invoice number	JUNEAPR02
Issue Date	16/06/15
Currency	GBP
PO number or XX Reference	XXJSMITH

Item list table:

Item ID	Description	Quantity	Unit	Unit price	Tax	Total GBP excl taxes
01.06.15	Appraisal 1	1	pcs	55.00	0%	55.00
05.06.15	Appraisal 2	1	pcs	60.00	0%	60.00

The Windows taskbar at the bottom shows the Start button, taskbar icons, system tray with 98% battery, and the time 09:54.

All of your invoices will be shown in the Documents Tab.



UPDATES

The following day you will receive a **DELIVERED** Status update – this means we have received your invoice and it is being processed.

Further updates you will receive:

Accepted – the invoice has now been approved and is ready for payment.

Paid – the invoice has been paid.

Rejected – the invoice has been cancelled – please contact NHS SBS on 303 123 1177 for further information of the cancellation.

Keep Track of your invoices and view the status via your Documents Tab – you can apply your own filters – eg to view those overdue or unpaid.

The screenshot displays the Tradeshift web application interface. On the left is a dark sidebar with navigation options: INVOICES FOR GP SURGERY KELLY THOMAS, Tasks, Profile, Connections, DOCUMENTS (with sub-options: Create..., Invoice, Credit Note, Documents), APPS (Explore Apps, My Apps), SUPPORT (Get Help), and KELLY THOMAS (Switch To..., Settings, Logout). A red arrow points to the 'Documents' option in the sidebar. The main content area shows a list of 'Filtered documents' sorted by 'ISSUE DATE'. The list contains six invoice entries with details such as invoice number, issue date, and amount. A 'Total Sales' summary shows 12,020.80 GBP. On the right, a blue 'Filters' panel is visible, currently set to 'Document status: DELIVERED', with options to save, select, or clear filters. The browser's address bar shows the URL: https://sandbox.tradeshift.com/app/Tradeshift.DocumentList.

Invoice ID	Description	Amount (GBP)
OFFICIAL TEST ACCOUNT ASHFORD & ST PETERS HOSPITALS NHS FT (R...)	SENT • SALE • INVOICE #999999 • ISSUE DATE: 09/06/15	11,995.20
OFFICIAL TEST ACCOUNT 5 BOROUGH PARTNERSHIP NHS FT (RTV)	SENT • SALE • INVOICE #123456A • ISSUE DATE: 22/04/15	1.20
OFFICIAL TEST ACCOUNT ASHFORD & ST PETERS HOSPITALS NHS FT (RTK)	SENT • SALE • INVOICE #123459 • ISSUE DATE: 22/04/15	1.20
OFFICIAL TEST ACCOUNT NORTH BRISTOL NHS TRUST (RVJ)	SENT • SALE • INVOICE #123456 • ISSUE DATE: 17/04/15	1.20
OFFICIAL TEST ACCOUNT NORTH BRISTOL NHS TRUST (RVJ)	SENT • SALE • INVOICE #123458 • ISSUE DATE: 18/03/15	10.00
OFFICIAL TEST ACCOUNT 5 BOROUGH PARTNERSHIP NHS FT (RTV)	SENT • SALE • INVOICE #123457 • ISSUE DATE: 23/01/15	12.00

Total Sales: 12,020.80 GBP