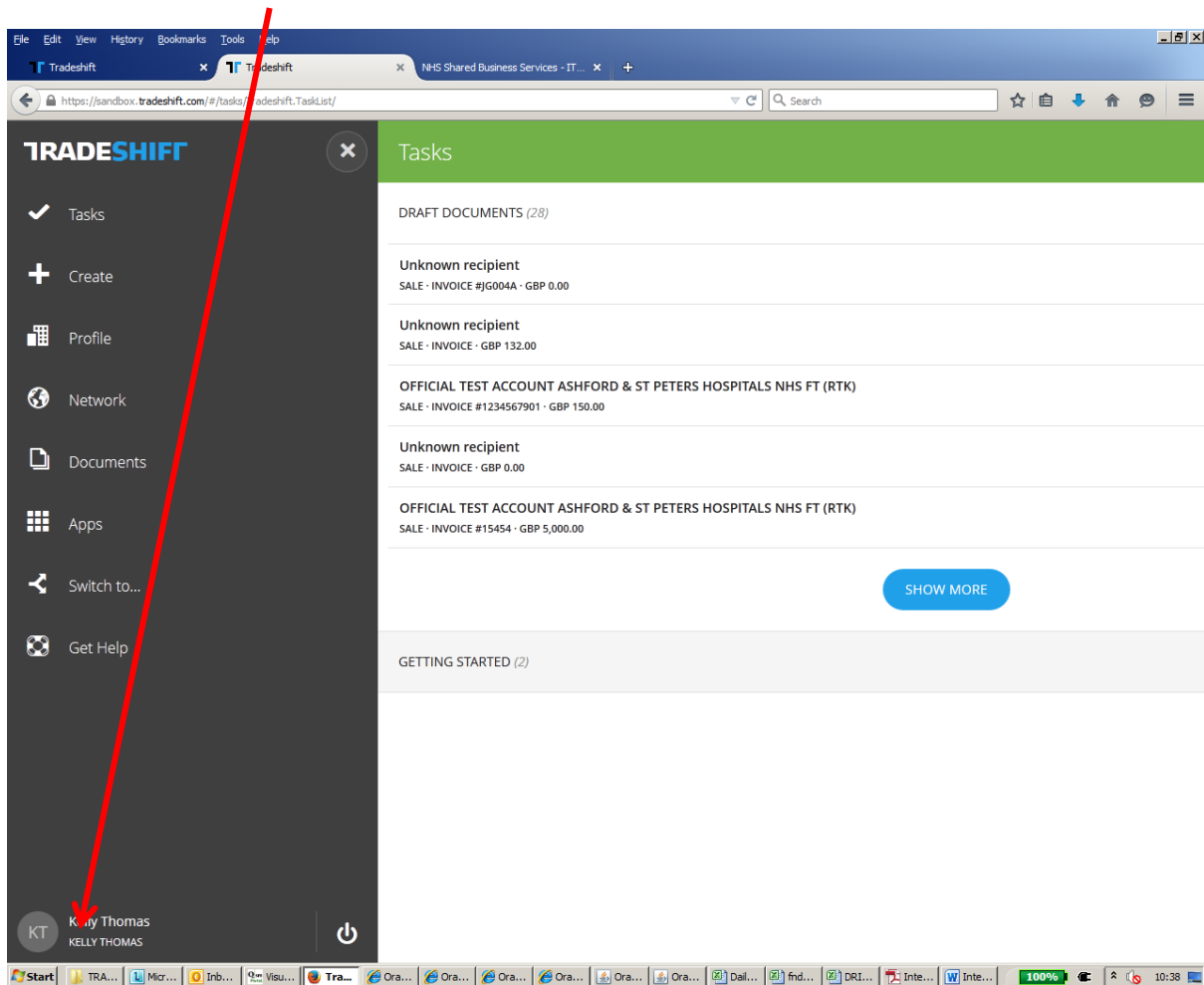


Sending an invoice via the Portal

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.



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

The screenshot shows a web browser window with the Tradeshift application. The page title is "User details" and the subtitle is "Basic details for your Tradeshift account". The user's email address is "kelly.thomas1@nhs.net", first name is "Kelly", and last name is "Thomas". The language is set to "English (UK)" and the time zone is "GMT". A red arrow points to the "English (UK)" dropdown menu. To the right of the form is a profile picture of a fox and a sidebar with links: "User details", "Company details", "Company logo", "Public profile", and "Notifications". At the bottom of the form are two buttons: "Change password" and "Save changes". 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.

File Edit View History Bookmarks Tools Help

Tradeshift NHS Shared Business Services - IT...

https://sandbox.tradeshift.com/#/apps/Tradeshift.Settings/G/account?execution=e3e1

Search

KT

User details

Basic details for your Tradeshift account

Email address [change email](#)

kelly.thomas1@nhs.net

First name

Kelly

Last name

Thomas

Language Time zone

English (UK) GMT

[Change password](#) [Save changes](#)

User details

[Company details](#)

[Company logo](#)

[Public profile](#)

[Notifications](#)

Start TRA... Mic... Inb... Visu... Tra... Ora... Ora... Ora... Ora... Ora... Dai... fnd... DRI... Inte... W Inte... 100% 10:47

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

The screenshot shows the 'Company details' page in the Tradeshift application. The page is divided into two main sections: 'Registration details' on the left and 'Company details' on the right. The 'Registration details' section contains a form with the following fields:

- Company name *: Invoices for GP Surgery Kelly Thomas
- Building name: [Empty field]
- Number: 200
- Street *: Demonstration Street
- Locality name: [Empty field]
- Town *: Cardiff
- County: [Empty field]
- Postcode *: CF1 4DE

The 'Company details' section on the right contains a profile picture of a fox and a list of links: User details, Company details, Company logo, Public profile, and Notifications. A red arrow points from the text 'Then go to Company Details' to the 'Company details' link. Another red arrow points from the text 'Please ensure your company name and address details are shown here.' to the 'Company name' field in the 'Registration details' section.

Below the form, a blue box contains the text: "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

Select

Company number

GLN [What is a GLN?](#)

Tax ID name/type

Select

Internal identifier

Kelly2

Network options

☐ Auto accept any new contact requests

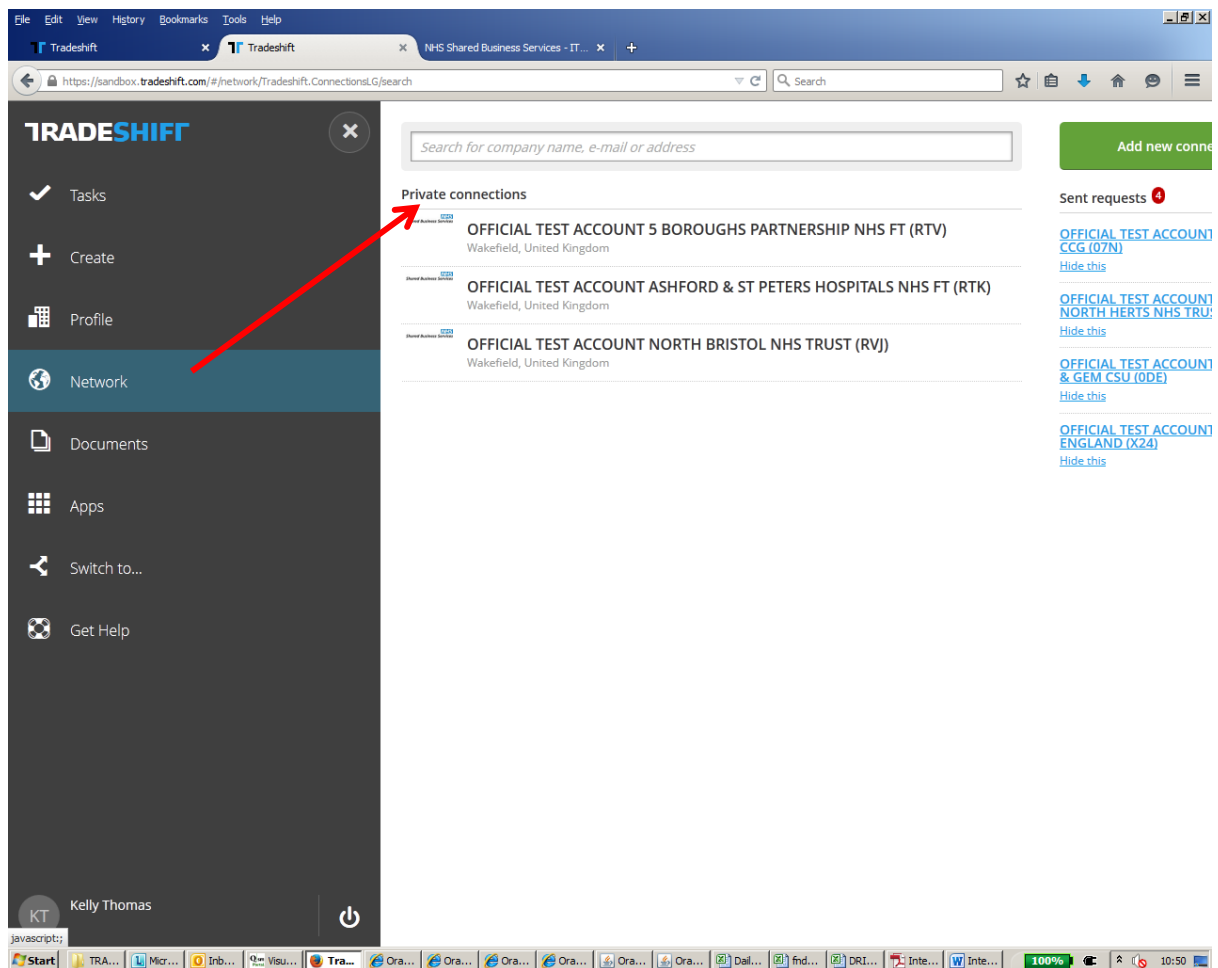
Save changes

Save Changes

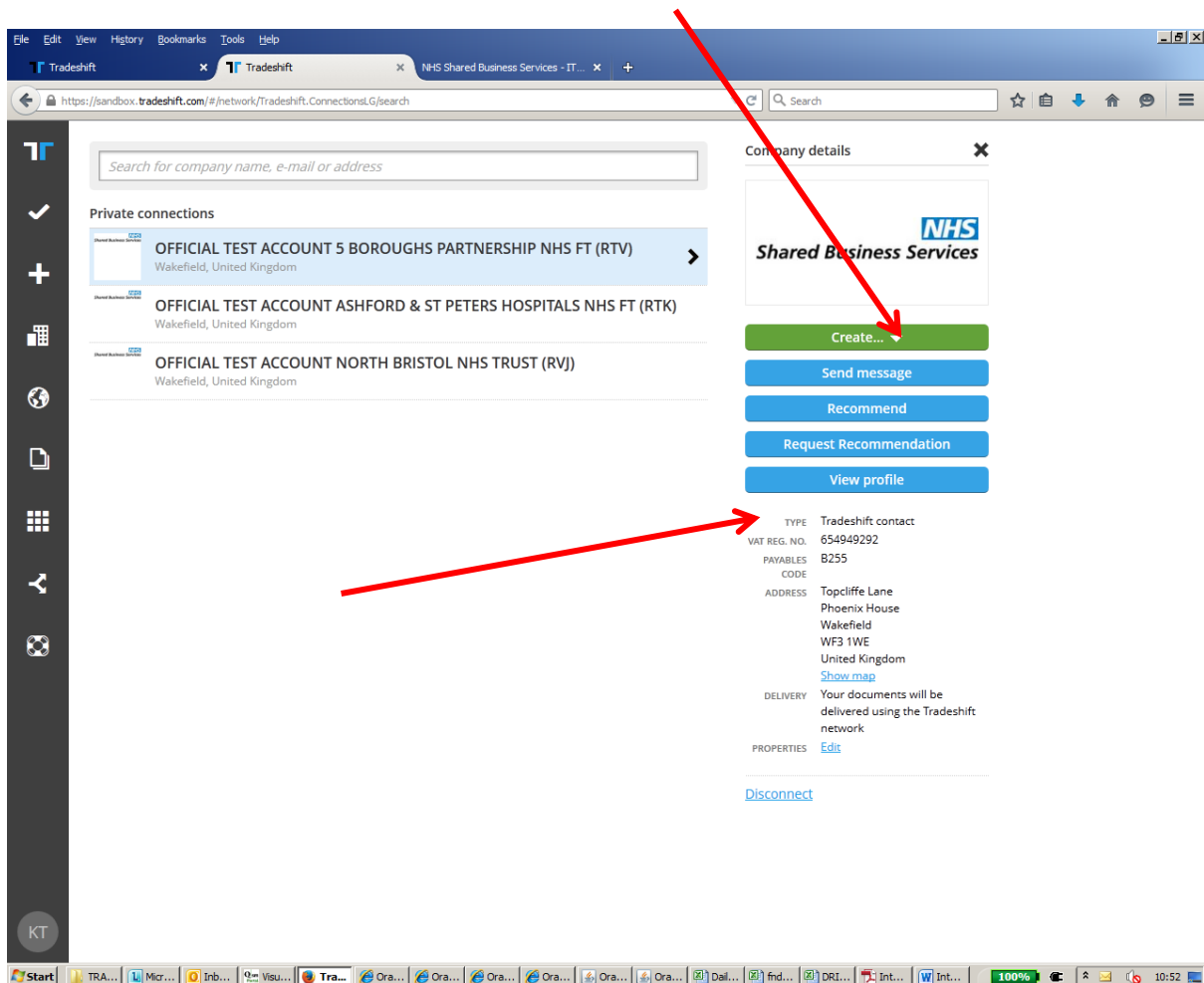
Be sure to scroll down to the VAT number and company registration number and enter if applicable.

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.



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. On the left is a blue sidebar with a 'Create documents' header and a list of document types: Invoice, Credit note, Quote, and Purchase Order. A red arrow points to the 'Invoice' button. The main area is titled 'Create Invoice' with a sub-link 'Autocomplete from document'. A red arrow points to the 'To' dropdown menu, which has a placeholder text 'Search for company name, e-mail or address'. To the right of the 'To' field are input fields for 'Invoice number' (12435672773), 'Issue date *' (25/08/15), 'Currency' (GBP), 'Payment due date', and 'Delivery date'. Below these is an 'Add optional field' button. At the bottom, there is a table with columns: Item ID, Description, Quantity, Unit, Price per unit excl. tax, Tax %, and Total. The first row shows a plus sign in the Item ID column, an empty description, an empty quantity, 'pcs' as the unit, an empty price, and '0%' as the tax. Below the table are buttons for 'Add new line' and 'Add discount or charge (e.g. freight)'. At the bottom right, there are fields for 'Subtotal excl. taxes' and 'Total GBP'. The bottom of the screen shows a Windows taskbar with various application icons and the system clock at 10:53.

Tradeshift

Create documents

- + Invoice
- + Credit note
- + Quote
- + Purchase Order

Create Invoice Autocomplete from document

To

Search for company name, e-mail or address

Invoice number Last used: 12435672773

Issue date * Currency 25/08/15 GBP

Payment due date

Delivery date

Add optional field

Item ID	Description	Quantity	Unit	Price per unit excl. tax	Tax %	Tc
+			pcs		0%	

Add new line + Add discount or charge (e.g. freight)

Subtotal excl. taxes

Total GBP

Write a message to the recipient

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 NHS Shared Business Services - IT... invoice creation page. The form is titled 'To' and contains the following information:

- Organisation:** OFFICIAL TEST ACCOUNT 5 BOROUGH PARTNERSHIP NHS FT (RTV)
- Address:** Topcliffe Lane, Phoenix House, Wakefield, WF3 1WE, United Kingdom
- VAT Reg. No.:** 654949292
- Org. Code:** RTV
- Payables Code:** B255
- Change recipient** (link)

The invoice details section includes:

- Invoice number *** (Last used: 12435672773): 12435672773
- Issue Date ***: 25/08/15
- Currency**: GBP
- PO number or XX Reference**: (empty)
- Add optional field** (dropdown)
- Item ID**: (empty)
- Description**: (empty)
- Quantity**: (empty)
- Unit**: pcs
- Price per unit excl. tax**: (empty)
- Tax %**: 0%
- Total excl. tax**: 0.00

The summary section shows:

- Subtotal excl. taxes**: 0.00
- Total GBP**: 0.00

At the bottom, there are two buttons: **Set delivery address** and **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

The screenshot shows the Tradeshift invoice creation interface. The interface includes a table with the following data:

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

Below the table, there is a section for 'Set delivery address' and 'Write a message to the recipient'. The 'Write a message to the recipient' section contains the text: 'Contact 0117 956 8978 in case of query or email kelly.thomas1@nhs.net'. There is a checkbox for 'Save notes for future invoices' which is checked. Below this, there is a section for 'Attachments' with the text: 'Only PDFs, TIFF, JPEG, PNG, GIF files are accepted formats. Please resubmit your attachment in one of these formats.' and a 'Choose File' button. A red arrow points to the 'Choose File' button.

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

FileEditViewHistoryBookmarksToolsHelp

TradeshiftTradeshiftNHS Shared Business Services - IT...+

https://sandbox.tradeshift.com/#/create/Tradeshift.Invoice.G/create?execution=e766Search


KT

✓+⌂🌐📄🗃️🔗🔍

KT

EditSend➔

Invoice



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

From

Invoices for GP Surgery Kelly Thomas

200 Demonstration Street
Cardiff
CF1 4DE
United Kingdom

Invoice number

AUGUSTAPR08

Issue Date

25/08/15

Currency

GBP

PO number or XX
Reference

XXJBLOGGS

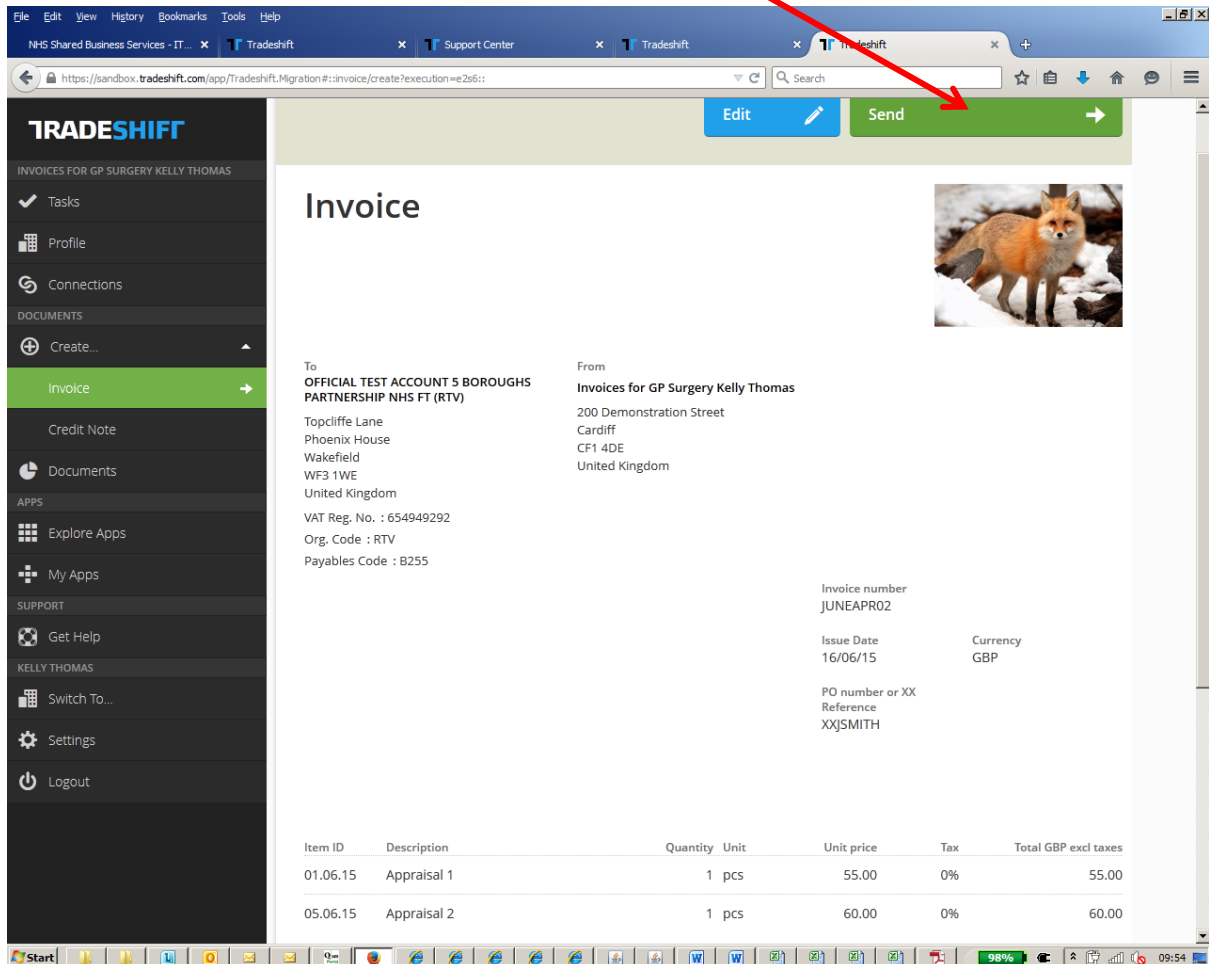
Item ID	Description	Quantity	Unit	Unit price	Tax	Total GBP excl. taxes
01.08.15	Appraisal 1	2	pcs	50.00	0%	100.00
05.08.15	Appraisal 2	1	pcs	60.00	0%	60.00
Subtotal excl. taxes						160.00
VAT Exempt 0% of 160.00 GBP						0.00
Total GBP						160.00

Delivery address

Notes

StartTR...Mic...NO...Vis...Tra...Ora...Ora...Ora...Ora...Ora...Dal...fnd...DR...Int...Int...100%11:25

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 is titled 'Invoice' and features a fox image. It displays 'To' and 'From' information, invoice details (number, date, currency, PO number), and a table of items.

Invoice

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

From
Invoices for GP Surgery Kelly Thomas
200 Demonstration Street
Cardiff
CF1 4DE
United Kingdom

Invoice number
JUNEAPR02

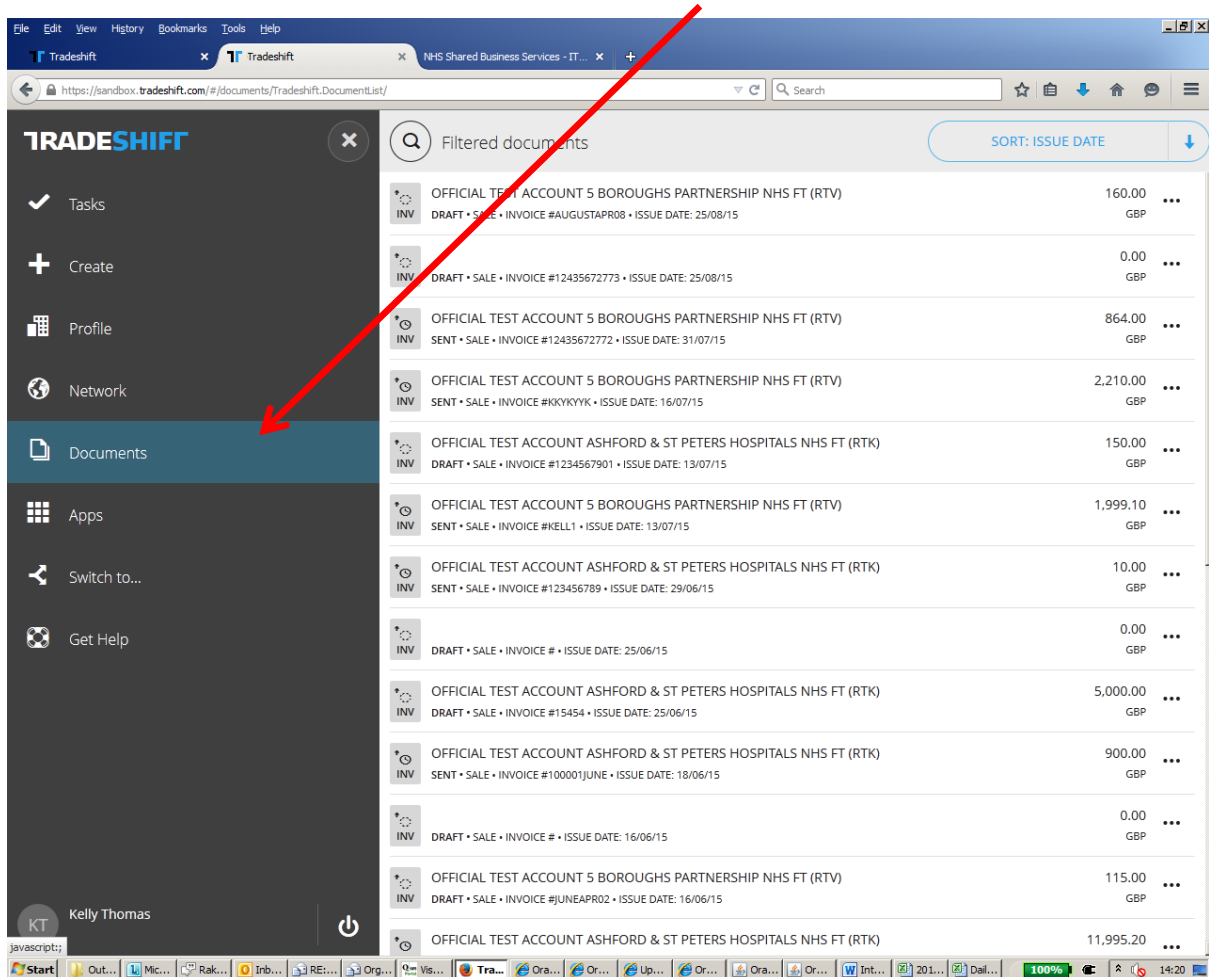
Issue Date
16/06/15

Currency
GBP

PO number or XX
Reference
XXJSMITH

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

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.

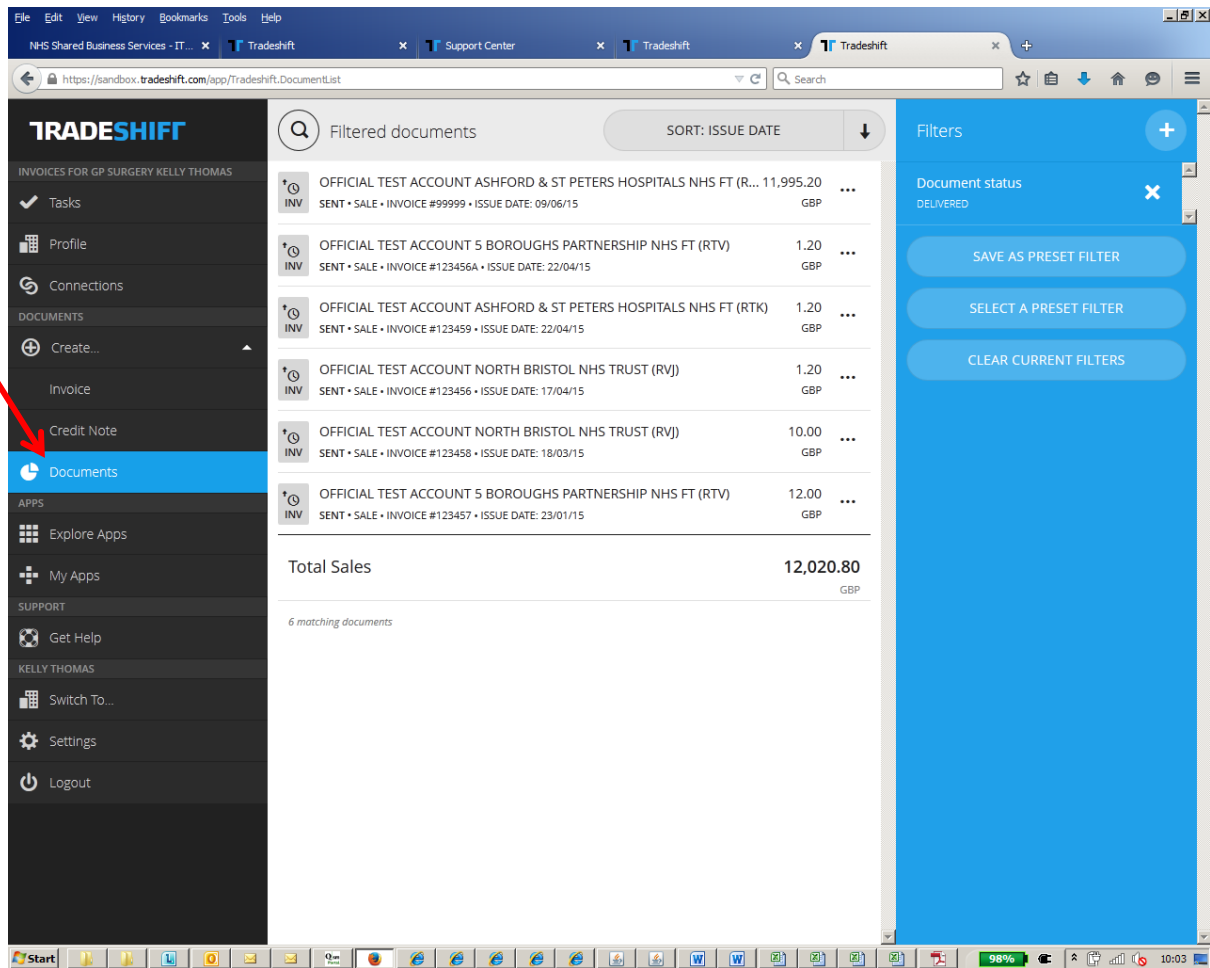
Further updates you will receive:

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 you own filters – eg to view those overdue or unpaid.



The screenshot shows the Tradeshift web application interface. The sidebar on the left contains navigation options: INVOICES FOR GP SURGERY KELLY THOMAS, Tasks, Profile, Connections, DOCUMENTS (with a sub-menu showing Create..., Invoice, Credit Note, and 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 displays 'Filtered documents' with a search bar and a 'SORT: ISSUE DATE' dropdown. The document list includes columns for invoice status (INV), description, amount, and currency (GBP). The total sales are shown as 12,020.80 GBP. A 'Filters' panel on the right allows for document status filtering, currently set to 'DELIVERED'.

INV	DESCRIPTION	AMOUNT	CURRENCY
INV	OFFICIAL TEST ACCOUNT ASHFORD & ST PETERS HOSPITALS NHS FT (R...)	11,995.20	GBP
INV	OFFICIAL TEST ACCOUNT 5 BOROUGHES PARTNERSHIP NHS FT (RTV)	1.20	GBP
INV	OFFICIAL TEST ACCOUNT ASHFORD & ST PETERS HOSPITALS NHS FT (RTK)	1.20	GBP
INV	OFFICIAL TEST ACCOUNT NORTH BRISTOL NHS TRUST (RVJ)	1.20	GBP
INV	OFFICIAL TEST ACCOUNT NORTH BRISTOL NHS TRUST (RVJ)	10.00	GBP
INV	OFFICIAL TEST ACCOUNT 5 BOROUGHES PARTNERSHIP NHS FT (RTV)	12.00	GBP

Total Sales: 12,020.80 GBP

6 matching documents

Filters: Document status (DELIVERED)

Buttons: SAVE AS PRESET FILTER, SELECT A PRESET FILTER, CLEAR CURRENT FILTERS