Tradeshift®

Marketplace Buyer Requisition to Purchase Training

Academic training & instructor led certification course provided by Tradeshift Professional Services

Date 11th & 12 October 2023 | Location: Zoom

Who we are?

Alexandra Vasile
Solutions Consultant

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Solutions Consultant

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Engagement Manager

Marketplace

Welcome!

LOITA

- Pamela Pfunye
- Kudzai Magwagwa
- Tinotenda Mangandza
- Ranganai Mukanhairi
- Ngoni Mugandani
- Raj Thiruppathy

FALMERTECH

- Gokhan Yazici
- Arda Ayyurek
- Lesedi Nchabeleng

Marketplace Buyer - Req to Purchase Training Plan

Marketplace

Online	Online	11th October	12th October	13th / 20th October
Self-Study Allego	Partner Training Account Prep (Allego)	Intro Standard Buyer Configuration exercises	Standard Buyer Configuration + Punch In Buyer Configuration exercises	Multiple choice exam
Online learning	Online Activities	Classroom / Zoom based training	Classroom / Zoom based training	Online Activities

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Agenda Day 1

Time CET	Topic	Description	Presenter
09:00-09:15	Introductions	Introduce delegates	All
09:15-09:45	Accounts Creation	Hands on exercises on Master and Branches creation	Kavita
09:45-10:15	Postman	Hands on exercises in Postman	Kavita
10:15-10:25		**Break**	
10:25-11:00	Master Account Configuration	Hands on exercises on the Master account configuration	Kavita
11:00-12:00	Branch Account Configuration	Hands on exercises on the standard/ eProcurement Branch configuration	Kavita
12:00-12:30		**Lunch Break**	
12:30-13:30	Legal Entities	Hands on exercises on Legal Entities creation	Alexandra
13:30-14:30	Coding Lists	Hands on exercises on Coding Lists creation	Alexandra
14:30-14:45		**Break**	
14:45-15:45	Users and Teams	Hands on exercises on Users and Teams creation	Alexandra
15:45-16:00	Summary, questions & wrap up		All

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Agenda Day 2

Time CET	Topic	Description	Presenter
09:00-09:15	Recap of previous day & questions		All
09:15 - 09:45	Workflow Configuration	Hands on exercises on the configuration of PR/PO workflow	Kavita
09:45 - 10:15	Network Connections	Hands on exercises on establishing Network Connections for transaction purpose	Kavita
10:15 - 10:25		**Break**	
10:25 - 10:45	Content Management	Hands on exercises on the View Creation	Alexandra
10:45 - 12:00	Unit Testing	Hands on exercises on how to test various PR-PO flows upon configuration completion	Alexandra
12:00 - 12:30		**Lunch Break**	
12:30 - 14:30	Punch In Branch Setup	Hands on exercises on the required configuration for Punch In solutions	Alexandra
14:30 - 14.40		**Break**	
14.40 - 15:45	Punch In Unit Testing	Simulation of a Punch In link into Tradeshift and the Shopping Experience	Alexandra
15:45 - 16:00	Summary, questions & wrap up		All

Training Objectives

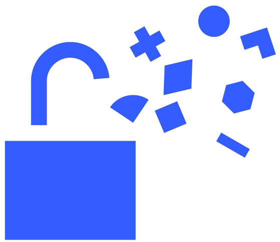
Learn how to deliver Tradeshift Marketplace **Buyer Req to Purchase** solution as a Partner:

- By understanding the functional concepts of the platform
- By knowing how to configure an integrated and robust solution
- Through hands on exercises
- Prepare participants for the certification exam

Practicalities around remote training

Marketplace

1. A laptop and a comfortable seating position
2. Check Internet access
3. For clear conversations, use a headset (headphones with a microphone)
4. A secondary monitor would be nice to have, for instance:
    a. Screen 1 for hands-on practical exercises
    b. Screen 2 to follow the trainer presentation
5. Cameras on (**preferably**)
6. Ask for breaks if needed
7. Be active and ask questions



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Day 1


Let’s go!

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Account Creation

Exercise: Creating your master account

1. Go to https://sandbox.tradeshift.com
2. Follow the steps for creating your own account - Use Email xxx.xxx+MPMasterBuyerPT@gmail.com
    a. Click on Sign up
    b. Add a Business Name(Your Name / Your Company Name MP Buyer- Master Branch)
    c. Select a Country / Region
    d. Click on Continue
    e. In step 2, fill in the First & Last Name and the Email address as advised above
    f. Accept the Tradeshift Terms of Service and Privacy Policy and click on Continue
3. Go to your gmail account and search for the email notification “Please activate your Tradeshift account”
4. Click on the Link, add a password for the account and then save it in your personal TAS.

Exercise: Creating your child branches

Marketplace

1. Login to your own Tradeshift master account - xxx.xxx+MPMasterBuyerPT@gmail.com
2. Install Branch Management App by clicking on the following link: (https://sandbox.tradeshift.com/#/apps/Tradeshift.BranchManagement)
3. Manually create **two** branches, with own information - Use following email format: xxx.xxx+MPStandardBuyerPT@gmail.com **and** xxx.xxx+MPPunchinBuyerPT@gmail.com
    a. Click on "Create new branch"
    b. Add the first branch name(eg: Your Name / Your Company Name MP Buyer - Standard Child Branch)
    c. Select Country/Region
    d. Add the branch email address as per the format xxx.xxx+MPStandardBuyerPT@gmail.com
    e. Add internal identifier - 1000
    f. Click on Create
4. Go to your gmail account and search for the "We welcome you to Tradeshift!" notification.
5. Repeat the above steps for the PunchIn branch

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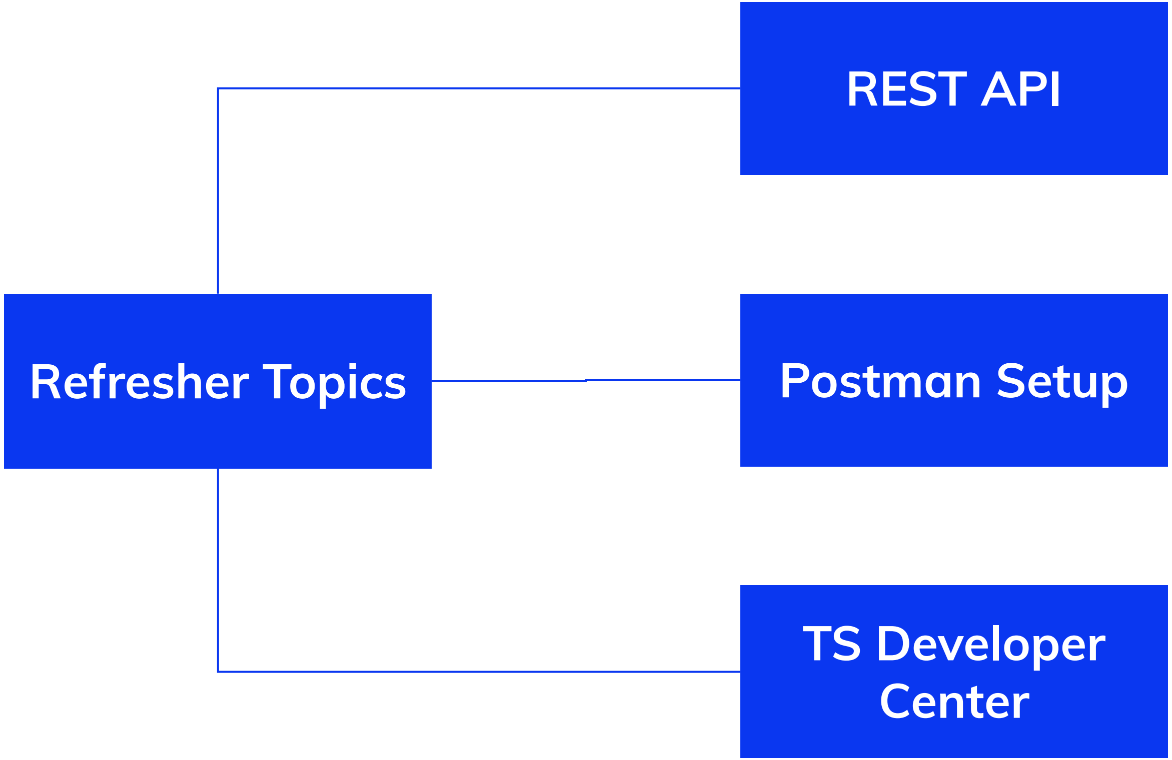
Postman

Introduction to Postman


Refresher Topics
REST API
Postman Setup
TS Developer Center

Introduction to Postman

Postman

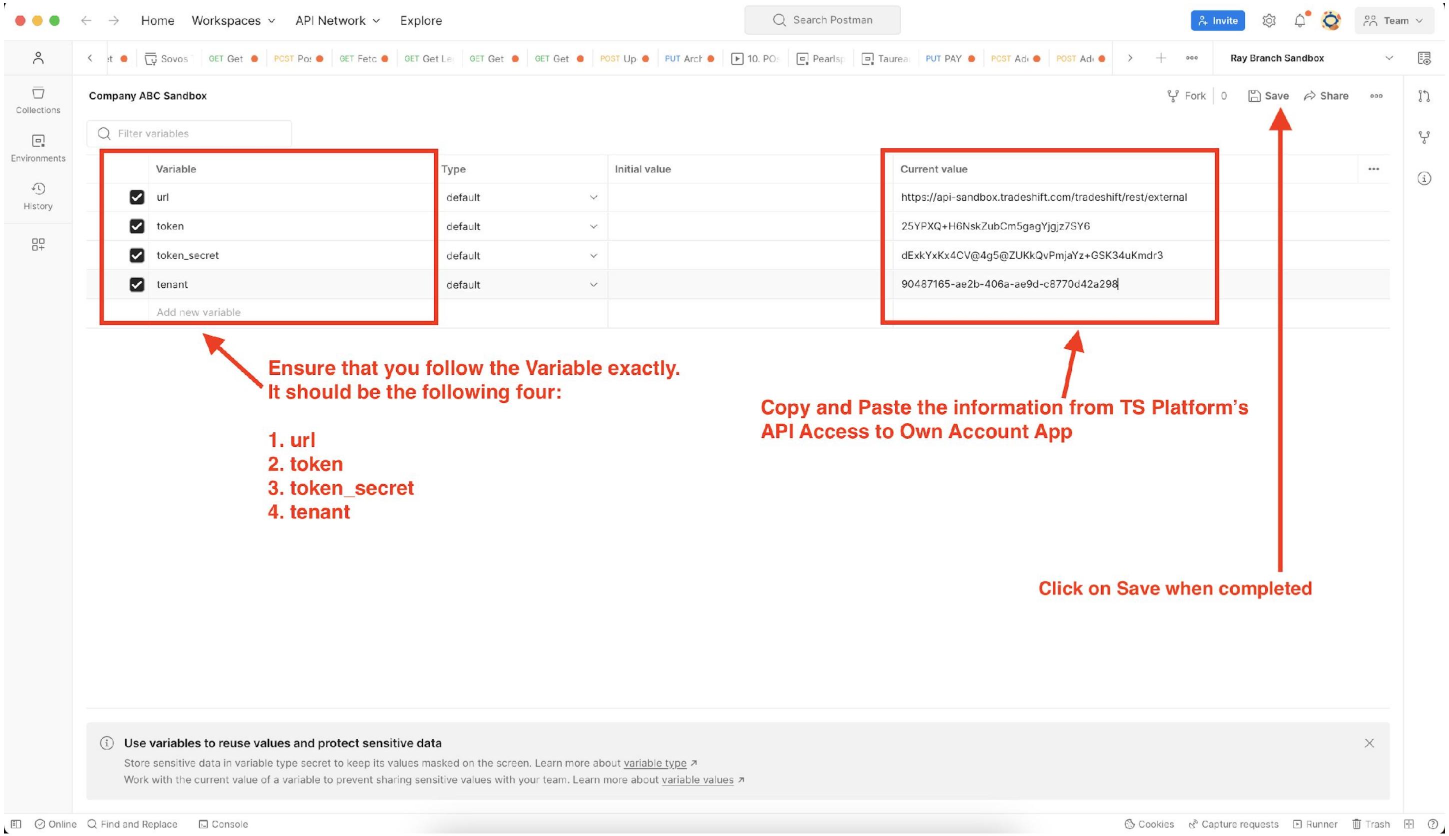
- Freeware, REST API Client
- HTTP requests – GET PUT POST DELETE
- Options to set environments
- Friendly GUI, Runner

Marketplace

Introduction to Postman

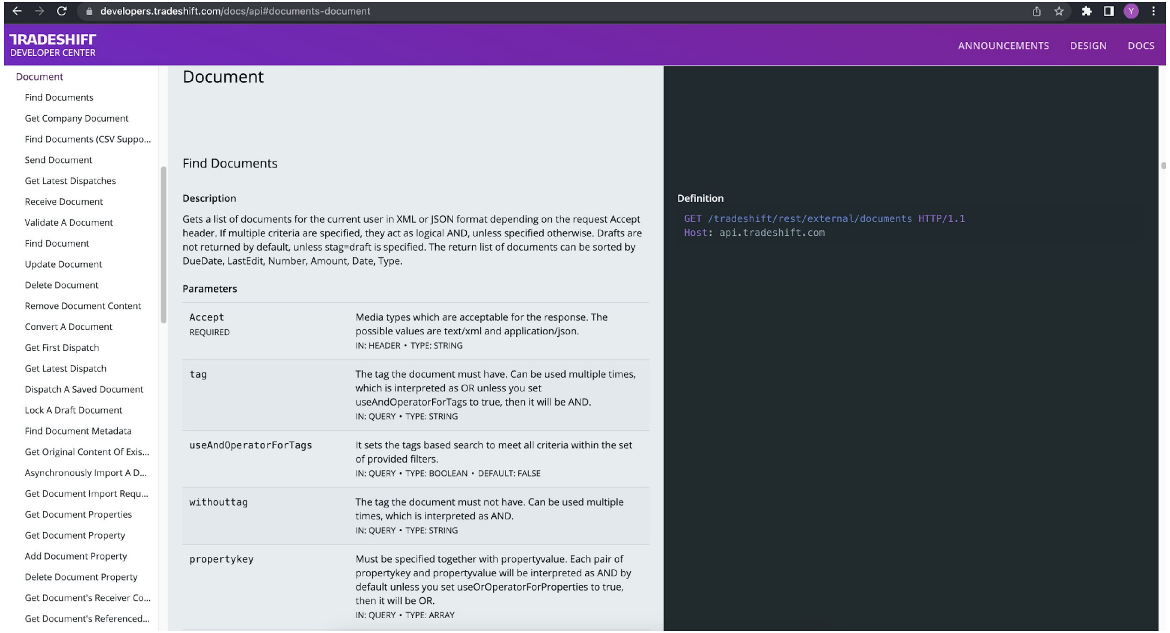
- REST API
  - OAuth1.0 and 2.0 Supported
  - JSON XML UBL
  - HTTP Protocol
  - 2 legged authentication

Postman Setup



TS Developer Center

https://developers.tradeshift.com/docs/api



Master Account Configuration

Exercise: Activate Basic Applications - Branch (Master)

Marketplace

1. Activate Tradeshift.Configurator App using https://sandbox.tradeshift.com/#/Tradeshift.Configurator
2. Activate Buyer Marketplace Manager app using https://sandbox.tradeshift.com/#/Tradeshift.BuyerMarketplaceManager
3. Activate ViewManager app using https://sandbox.tradeshift.com/#/Tradeshift.ViewManager
4. Activate API Access to Own Account app using https://sandbox.tradeshift.com/#/Tradeshift.APIAccessToOwnAccount

Exercise: Postman Environment Setup - Master

Marketplace

1. Open Postman and click on New
2. Select Environment - name it as per your Master Branch's name
3. Open the APIAccessToOwnAccount on the Master Branch
4. Start filling in the Postman fields with data from the APIAccessToOwnAccount app:
    a. Please use these exact variable names: **token**, **token_secret**, **tenantId**, **url**, as this is how they were defined in all the API calls
5. Save the Changes after completing the above details

Exercise: Key Technical Configurations - Master

Marketplace

1. Open Postman and choose your Master account environment
2. Download the "**1. Master Branch Configuration"** ***and*** **2. Master Branch -Set PRV2 Configuration** collection
3. Open the Postman application
4. Select the Environment you previously set up for your Child Branch
5. Import the 2 collections into Postman:
    a. Click on **Import**
    b. Select the 2 above mentioned files file from your computer and confirm import
    c. View the imported collections on the left panel of Postman
6. Use the "**1. Master Branch Configuration**" collection that contains 2 calls:
    a. Configure the "Customer Checkout flow" option - set it to "enterprise"
        <u>Reason</u>: This is a prerequisite for the PRV2 to be properly configured
    b. Set Buyer as "Enterprise Buyer"
        <u>Reason</u>: The offers and the product visibility will be using this key in the background
7. Set Buyer PRV2 Configuration (use "**2. Master Branch -Set PRV2 Configuration**" Postman collection)
    <u>Reason</u>: PRV2 is the key application used for the Purchase Request generated. PRV2 configuration eases the configuration to be done at Master and thereby inherited to all the Child branches.

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Exercise: Exchange Rates Upload

Marketplace

1. Open Postman and choose your Master account environment
2. Download the “**3. Master Branch - Set Exchange Rates”** collection
3. Open the Postman application
4. Select the Environment you previously set up for your Child Branch
5. Import the **3. Master Branch - Set Exchange Rates** collection into Postman
   a. Click on **Import**
   b. Select the **3. Master Branch - Set Exchange Rates.*json*** file from your computer and confirm import
   c. View the imported collection on the left panel of Postman
6. Use the “**3. Master Branch - Set Exchange Rates**” collection that contains some predefined exchange rates to be uploaded
7. Login on the Master account in the UI
8. Open Tradeshift Configurator
9. Go to Exchange Rates Configuration - the exchange rates just uploaded should be displayed here
10. Same step could be performed on the branch, as the Exchange Rates uploaded on the Master will be available for each of the buyer’s branches

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Branch Account Configuration

Exercise: Setting up Company Profile(Branch)

Marketplace

1. Login to the Child branch and open the Company Profile app from the Apps Menu
2. Or use the following link to open it
   https://sandbox.tradeshift.com/#/Tradeshift.CompanyProfile
3. Go to Complete your Profile section and fill it in with the details of your company(Industry, Company Description, Company address, Phone, Registration Address, Company Email address .

Note: If the Buyer is not using Legal Entities, the Company address will be the Billing address on the PO, this it is critical to be filled in

4. Fill in some random Company Identifiers (VAT, Company Number)

Exercise: Activate Basic Applications - Branch (Buy)

Marketplace

1. Activate Tradeshift.Configurator App

   https://sandbox.tradeshift.com/#/Tradeshift.Configurator
2. In Configurator, activate all the BUY related apps
3. Activate Shop app using https://sandbox.tradeshift.com/#/Tradeshift.Shop
4. Activate Basket App using

   https://sandbox.tradeshift.com/#/Tradeshift.AppStore/apps/Tradeshift.Basket
5. Activate Written Request app using

   https://sandbox.tradeshift.com/#/Tradeshift.WrittenRequest
6. Activate API Access to Own Account app using

   https://sandbox.tradeshift.com/#/Tradeshift.APIAccessToOwnAccount

Exercise: Postman Environment Setup - Branch

Marketplace

1. Open Postman and click on New
2. Select Environment - name it as per your Child Branch's name - the Standard Buyer(eProcurement solution)
3. Open the APIAccessToOwnAccount on the Child Branch
4. Start filling in the Postman fields with data from the APIAccessToOwnAccount app:
   a.Please use these exact variable names: **token**, **token_secret**, **tenantId**, **url**, as this is how they were defined in all the API calls
5. Save the Changes after completing the above details

Exercise: Key Technical Configurations - Branch

Marketplace

1. Download the “**4. Child Branch - Company Property Settings”** collection
2. Open the Postman application
3. Select the Environment you previously set up for your Child Branch
4. Import the **4. Child Branch - Company Property Settings** collection into Postman
   a. Click on **Import**
   b. Select the **4. Child Branch - Company Property Settings.*json*** file from your computer and confirm import
   c. View the imported collection on the left panel of Postman
5. Select the ***Runner*** option on the bottom right side of the Postman window
6. Drag the **4. Child Branch - Company Property Settings** collection
7. Click on the orange ***Run 4. Child Branch - Company Property Settings*** button
8. Review that all API calls have run successfully (201 Created or 204 No Content statuses)

Exercise: Enable Goods Receipt and Order Change Request

Marketplace

1. Download the "**5. Child Branch - Enable Document Flips(O)**" collection
2. Open the Postman application
3. Select the Environment you previously set up for your Child Branch
4. Import the **5. Child Branch - Enable Document Flips(O)** collection into Postman
   a. Click on **Import**
   b. Select the ***5. Child Branch - Enable Document Flips(O).json*** file from your computer and confirm import
   c. View the imported collection on the left panel of Postman
5. Select the ***Runner*** option on the bottom right side of the Postman window
6. Drag the **5. Child Branch - Enable Document Flips(O)** collection
7. Click on the orange ***Run 5. Child Branch - Enable Document Flips(O)*** button
8. Review that all API calls have run successfully (201 Created or 204 No Content statuses)

Exercise: Install Buy Core apps and enable Procurement Assistance for Written Request

1. Open the Tradeshift Configurator App

   https://sandbox.tradeshift.com/#/Tradeshift.Configurator

2. Go to “Install required apps”, Buy section, toggle on the “BUY Core” apps
3. Go to Procurement Assistance Setup
4. Under the Written Request section, select Required Procurement Assistance and Save

Legal Entities Creation

Exercise: Create a Legal Entity, with Billing address and Delivery Address

1. Open Postman and choose your environment
2. Import the "**6. Child Branch - Create Legal Entities**" collection to expand the list.
3. Click on the Runner button
4. Select the Legal Entities collection. Though it contains 7 API calls, please make sure that only the first three calls are ticked(create legal entity, create location(delivery) & create location(billing)
5. For Data, select the MP_buyer_legal_entities.csv file from your computer (please note you need to add the details of the Legal Entity in the file first)
6. Click 'Preview' to check if it appears correctly
7. Click Start Run
8. Review that all API calls have run successfully (201 Created status)
9. Run the "Get Legal Entity by Branch" call and ensure your legal entity was created
10. Run the "Get Addresses for Legal Entity" and ensure the Billing/Delivery addresses were created(Instead of {{LegalEntityId}} in the endpoint, please use the Legal entity Id retrieved in step #9 .

Coding Lists Configuration

Exercise: Creating coding lists and values via API

Marketplace

1. Open Postman and go to your Child Branch environment
2. Click on Import and then select the ***7. Child Branch - Create Coding Lists*** collection from your computer
3. View the imported collection on the left panel of Postman
4. Run each component call individually.
    a. The ***PUT Coding list (listname)*** calls will create the **4** coding lists: **Company Codes, Commodity Codes, Cost Centers and General Ledger Codes**
    b. The ***POST Coding lists (listname) entries*** will populate the **4** coding lists with values

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Exercise: Review created coding lists & entries

1. Log in to your Tradeshift Child Buy branch
2. Open the ***Tradeshift Configurator / Coding Configurator*** app by accessing the https://sandbox.tradeshift.com/#/Tradeshift.Configurator/coding-configurator url
3. Go to the Maintain Coding Lists Tab and open each Coding list, one by one:
   a. For each Coding List, click on **Coding List Entries** on the right side and view the respective entries
4. You could also use the Get API calls “Get Coding lists ({{listname}}) entries” in the ***7. Child Branch - Create Coding Lists*** collection

Users & Teams Creation

Exercise: Creation of users via API

Marketplace

1. Download the ***8. Child Branch - Create Users*** collection) and user input file (***MP_buyer_user_runner_input.csv*** file)
2. Open the Postman application
3. Select the Environment you previously set up for your child branch
4. Make sure that the **username** environment variable is set with your firstname.lastname details
5. Import the ***8. Child Branch - Create Users*** collection into Postman
    a. Click on ***Import***
    b. Select the ***8. Child Branch - Create Users.json*** file from your computer and confirm import
    c. View the imported collection on the left panel of Postman

Exercise: Creation of users via API (cont.)

Marketplace

7. Select the ***Runner*** option on the bottom right side of the Postman window
8. Drag the **8. Child Branch - Create Users** collection
   a. Make sure that all three PUT calls are checked (selected)
   b. For the ***Data*** field, click on ***Select File*** and choose the ***MP_buyer_user_runner_input.csv*** file from your computer.
   c. The ***Iterations*** field value should be automatically updated to 3.
   d. Click on the orange ***Run*** button
9. Review that all API calls have run successfully (201 Created status)

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Exercise: Creation of users via UI - Child Branch

1. Log in to your Tradeshift **Child** branch
2. Open the ***Users*** app by accessing the https://sandbox.tradeshift.com/#/Tradeshift.Users url
3. Click on “Add User”
4. Create the admin user with the following details:
   a. Email: **username**+PT-MP_Buyer_Admin@gmail.com
   b. First name: Admin
   c. Last name: Adam
   d. Role: Company admin
5. Add roles for the newly created user: Queue Manager

Exercise: Activate the user accounts

Marketplace

1. Log in to your gmail
2. Search for the “You have been invited to {{Child Branch name}}'s account on Tradeshift”
3. Click on “**Join our team**” of the first email notification
4. Type in a password for the user account
5. Click on **Start Using Tradeshift**
6. Repeat the steps for each of the users added as part of the previous exercises

Exercise: Review created users

Marketplace

1. Log in to your Tradeshift Child Buy branch
2. Open the ***Users*** app by accessing the https://sandbox.tradeshift.com/#/Tradeshift.Users url
3. Review the 3 newly created users
    a. Select each user from the ***Users*** tab
    b. Review the ***Email***, ***First name*** and ***Last name*** details by clicking the Edit Details button
    c. Review the ***Roles*** section
    d. Review that the ***Manager***, ***Spend limit***, ***Approval limit, Company Code*** and ***Cost Center*** fields were correctly populated in the ***Accounting and approval settings*** section
4. Additionally, you could also use the “Get Users in Account” from the Users API collection

Tradeshift

Exercise: Creation of Teams via API

1. Download the ***9. Child Branch - Create Teams*** collection and team input file (***MP_buyer_teams_input.csv*** file)
2. Open the Postman application
3. Select the Environment you previously set up for your child branch
4. Import the ***9. Child Branch - Create Teams*** collection into Postman
    a. Click on ***Import***
    b. Select the ***9. Child Branch - Create Teams.json*** file from your computer and confirm import
    c. View the imported collection on the left panel of Postman

Exercise: Creation of Teams via API (cont.)

Marketplace

7. Select the ***Runner*** option on the bottom right side of the Postman window
8. Drag the **9. Child Branch - Create Teams** collection
    a. Make sure the API call is checked (selected)
    b. For the ***Data*** field, click on ***Select File*** and choose the ***MP_buyer_teams_input.csv*** file from your computer.
    c. The ***Iterations*** field value should be automatically updated to 2.
    d. Click on the orange ***Run*** button
9. Review that all API calls have run successfully (201 Created status)

Exercise: Creation of teams via UI - Child Buy Branch

Marketplace

Add two teams to your Child branch

1. Log in to the Child branch
2. Open the ***Users*** app and select Teams
3. Click the Create Team button
4. Enter a Team Name and Description and then click Create Team to confirm. The two teams to be created are **CANSELECTOBO** and **super-accounting**
5. Add members to the two teams:
    a. Select the **CANSELECTOBO** team and click Add Members
    b. Search the ***username*+PT-MP_Buyer_Procassist**@gmail.com user and click Add to Team
    c. Select the **super-accounting** team and click Add Members
    d. Search the ***username*+PT-MP_Buyer_Procassist**@gmail.com user and click Add to Team

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Exercise: Adding Members to a Team (UI)

Marketplace

1. Log in to the Child branch
2. Open the ***Users*** app and select Teams
3. Click on EprocurementAssistanceTeam
4. Click “Add Member”
5. In the Search field, type Procure or Peter(the name of your Procurement Assistant User)
6. Select the user and click on “Add to Team”
7. Repeat the above steps for the Admin user Adam that should be added to the Admin team

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Recap
Q&A

Thank you!