TRADE SHIELD SET-UP PROCESS

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The set-up of your Trade Shield Platform is designed to be clear, structured, and collaborative.

Welcome to Trade Shield!

HI THERE!

To help us set you up for success from day one, we've created this quick guide to walk you through the set up process.

Our aim is to configure your platform correctly, process your data securely, and ensure your team is fully confident in using the system from day one of going live.

This document provides a high-level overview of the Trade Shield set-up process for the Credit Management and Onboarding Module.

Let's get started!

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WHAT TO EXPECT FROM US

- A dedicated Customer Success Manager who will run the set-up project.
- A clearly defined set-up timeline with milestones at each stage.
- Configuration managed by Trade Shield, including collaborative workshops to review and refine your setup.
- Comprehensive training and change management support.
- Credit consulting support and best practice guidelines.
- A customised digital credit application and credit limit approval process.
- A quick set-up process that is often completed in less than 4 weeks, with the aim to always complete within 8 weeks.

SET-UP TIMELINE & ACTIVITIES

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
1. Data submission (customer Masterfile + 12 months historic ageing, onboarding docs). 2. Initial workflow configuration in text environment.							
		1. Configuration workshop with your team. 2. Processing and validation of historic ageing data.					
				1. Workflow review and refinement in UAT. 2. Quality checks on processed data.			
						1. Migration of workflows into production. 2. Finalisation of user access. 3. Go-live workshop and training.	

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Weeks	Overview of Activities
1 - 2	Submission by you of data required for the Credit Management and Onboarding Modules. Trade Shield hosts an initial Workflows Setup and Configuration Workshop with you.
3 - 4	Trade Shield processes your submitted historic aging data. We finalize the workflow setup in your User Acceptance Testing (UAT) environment.
5 - 6	Trade Shield performs quality checks on all processed data. We move the approved workflow from UAT to your live Production environment.
7 - 8	Finalisation of your user list and a comprehensive Go-Live Workshop to launch the platform

SET-UP PROCESS IN DETAIL

- **Submission of your Data**

We begin by preparing your platform. You will be guided by our Data Submission Guides, which explain what information is needed and how to provide it securely. By the end of this stage, your initial data has been received and is ready for processing.

- **Configuration, Data Processing & Review**

Your platform is configured in a User Acceptance Testing (UAT) environment. We then host a workshop with your team to review the setup, confirm approval levels, and capture any adjustments. During this stage, we also process your aging and Masterfile data, enabling powerful insights like payment behaviour and limit recommendations.

- **Go-Live Workshops, User Access & Training**

Once the configuration is approved in UAT, we move your platform to the live environment. A go-live workshop is hosted where your team is introduced to the system, assisted with logging on, and trained on navigating the platform, ensuring everyone is ready from day one.

- **Ongoing Support and Account Management**

After going live, your team will be invited to our weekly online training workshops and get access to our Knowledge Centre. We will introduce you to our dedicated Support team and Account Manager and continue to monitor data submissions to ensure your platform remains accurate and valuable.

FAQ'S

How long does the Trade Shield set-up take?

The set-up process typically takes 4 - 8 weeks, beginning with data submission and ending with your team being fully trained in a go-live workshop. The timeline largely depends on the prompt submission of your data.

How do we submit our data?

All data submissions should follow the instructions in our Data Submission Guide for the Credit Management and Onboarding Module. These outline the required formats and secure submission methods, which are typically via our dedicated File Submissions email address or a secure SFTP folder.

Who from our team should be involved?

We recommend including:

- A Finance and/or Credit Manager this is often the person who primarily assists in the set-up project
- Credit Controllers and/or the Sales Manager or whoever else is will be involved in or make use of the Digital Credit Application process.

Can the Trade Shield Set-up timelines be adjusted?

Yes, the timeline is flexible. While the standard process takes around 4-8 weeks, the most significant factor influencing the speed of the project is how quickly we receive your complete and accurate data.

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