theTradeDesk®

CURRENT SUPPLIER GUIDE

Table of Contents

theTradeDesk

01 The Trade Desk & Benefits of Coupa Supplier Portal

Updating your company's information via CSP

The Trade Desk utilizes the Coupa Supplier Portal (CSP) for gathering and handling supplier information. This guide offers a step-by-step instruction for updating your company information.

Benefits of the Coupa Supplier Portal

- Easy to use interface!
- Securely manage your company's sensitive banking & contact information.
- Visibility into TTD Purchase Orders, PO-Backed invoices and payments.
- No software or hardware to download.
- Free of charge – There is no cost to you!

What kind of information can you update through the CSP?

- Securely update Contact Information, Company Address, Remittance, Banking and Tax Information.
- PO Email – Coupa will automatically send the Purchase Order to the PO email listed in the system once approved.

Why should you keep your company's information up to date?

- If your banking information does not match what is listed on the invoice or has been changed, this can cause delays in payment.
- Easily communicate with The Trade Desk.

Note: *It is your responsibility, as a supplier, to keep the information provided to The Trade Desk up to date.*

Steps to a Successful Supplier Update

1. **Receive Invitation from The Trade Desk**
2. **Create Coupa Supplier Portal (CSP) Login**
   [when applicable]
3. **Connect Your CSP Account to The Trade Desk**
   [when applicable]
4. **Complete Supplier Information Update Form**
5. **Submit Form**
6. **Verbal Bank Verification**
7. **Approval from The Trade Desk**

Let us guide you through a successful update of your company's information

02 Supplier Invitation Overview

theTradeDesk

Supplier Information Update Invitation

The Coupa Supplier Portal (CSP) streamlines business interactions with The Trade Desk for suppliers. Easily manage account details, transactions, and invoicing. The Trade Desk invites you to the portal for updates via a supplier update form.

If you are currently doing business with The Trade Desk and need to update your information, reach out to your Trade Desk Contact. **You will need to receive a request from The Trade Desk to update your information.**

If you **are not a user of the Coupa Supplier Portal (CSP),** we will **send you an invitation to create your CSP account** prior to updating your information.

Invitations to the CSP expire after 30 days.

03 Invitation to Join the Coupa Supplier Portal (CSP)

theTradeDesk

The Trade Desk Invitation – Coupa Supplier Portal (CSP)

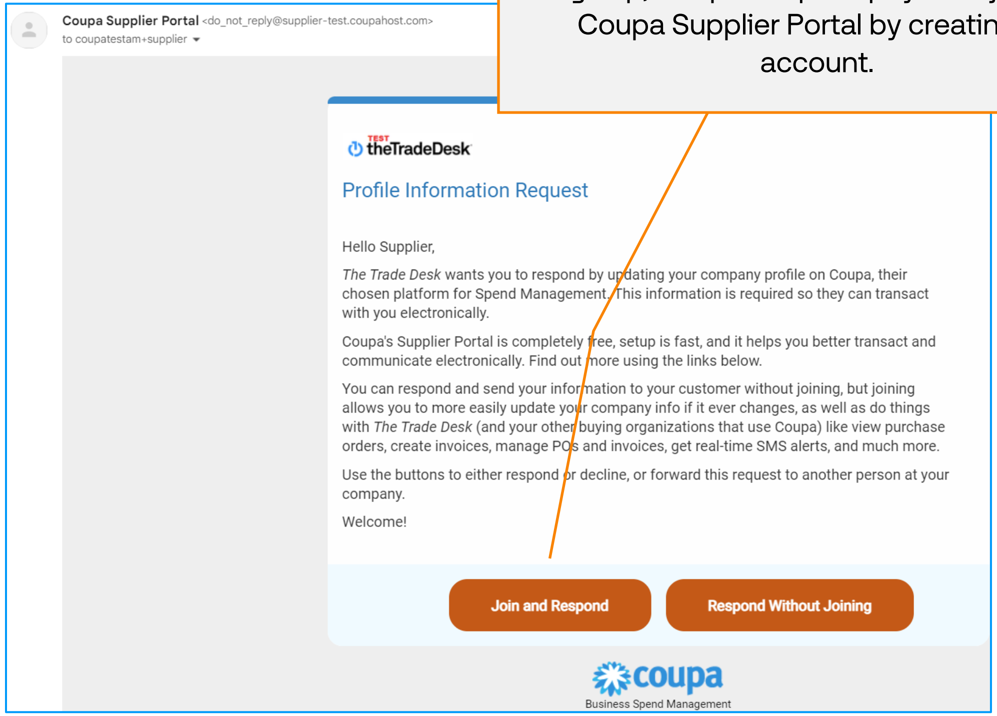
If you are not a current user of Coupa Supplier Portal and need to provide updated account information to The Trade Desk, follow this instruction.

The Trade Desk requests you create an account to update your information. **This is not required but will allow you to better manage the information you want to share with us.**

If you decide to respond without joining, The Trade Desk will need you to re-fill out the entire Supplier Update Form if there is an error with your form.

NOTE: If you are a current CSP user and need to connect your account, please navigate to the guide titled **Connect Your CSP Account with The Trade Desk.**

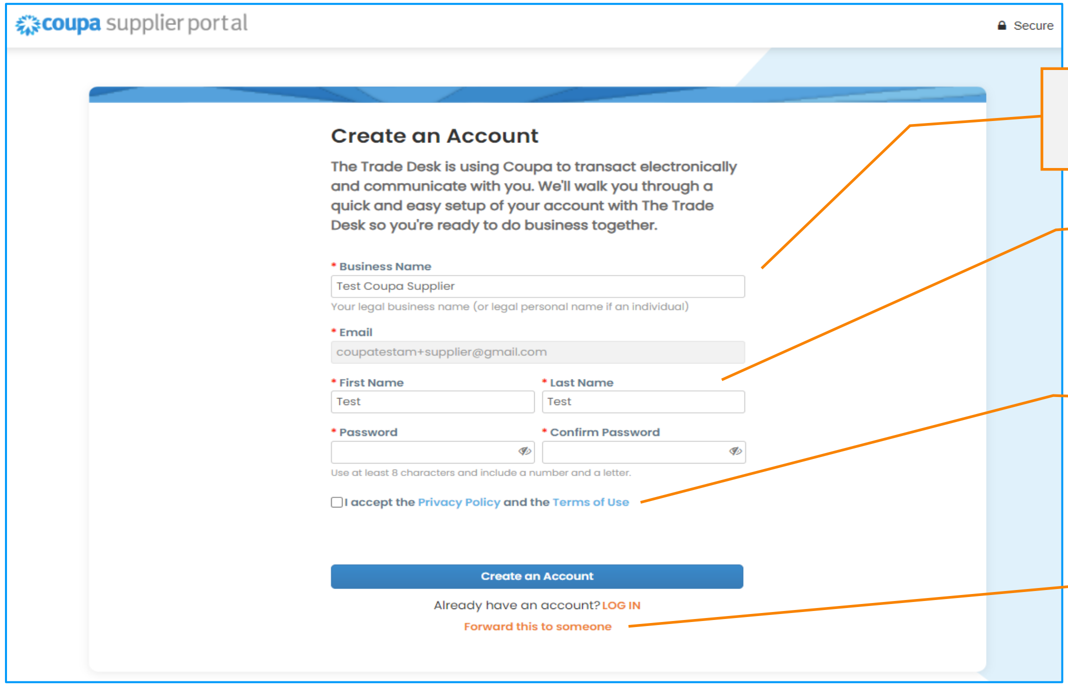
When you click on "**Join and Respond**" to sign up, Coupa will prompt you to join the Coupa Supplier Portal by creating an account.



Coupa Supplier Portal – Join and Respond

After clicking “**Join and Respond**,” you will be promoted to the page below. Here you will create your login by populating the required fields and accepting **Coupa’s** Privacy Policy and the Terms of Use.

By selecting “**Create an Account**” Coupa will automatically direct you to the Coupa Supplier Portal page.



Business Name and Email fields are prepopulated.

Create your **Password**.

Tick the “**I accept the Privacy Policy** and **Terms of Use**” and click **Get Started**.

Link to “**Forward this to someone**”

TIP: You can forward the invitation by clicking “**Forward this to someone**”, if you are not the correct point of contact at your company to fill out the form. You will need to enter an email address with the same domain.

theTradeDesk

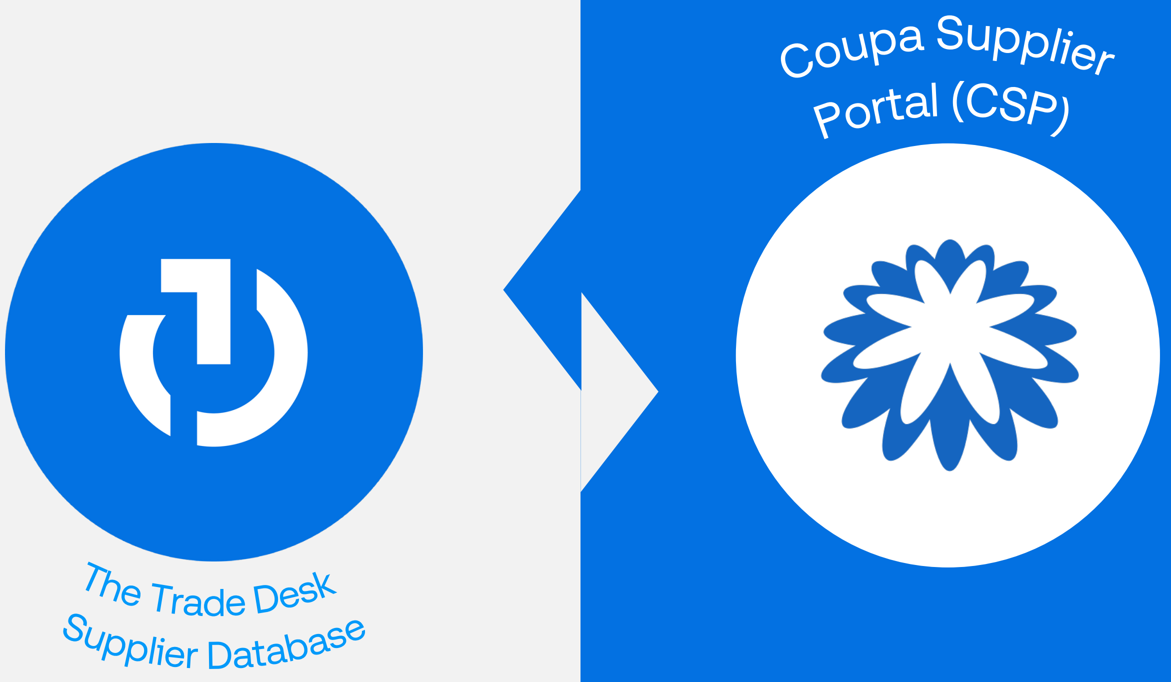
04 Connect your CSP Account with The Trade Desk

Connect your CSP Account with The Trade Desk

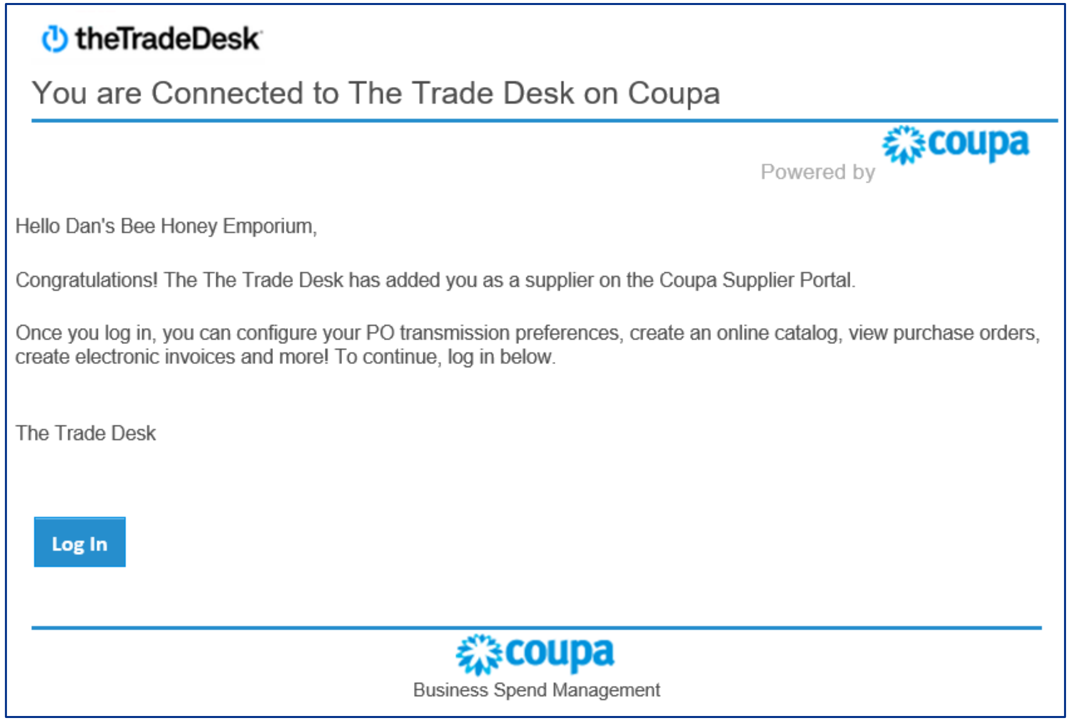
If you are a current user of the Coupa Supplier Portal and have not yet linked your account to The Trade Desk, your CSP account will need to connect with The Trade Desk to update your Supplier information and manage your POs.

You will **not** be able to request a merge through the CSP with The Trade Desk.

To ensure your account links, please reach out to your contact at The Trade Desk with the **email associated with your CSP account**.



Connect your CSP - Invitation



theTradeDesk

You are Connected to The Trade Desk on Coupa

Powered by coupa

Hello Dan's Bee Honey Emporium,

Congratulations! The The Trade Desk has added you as a supplier on the Coupa Supplier Portal.

Once you log in, you can configure your PO transmission preferences, create an online catalog, view purchase orders, create electronic invoices and more! To continue, log in below.

The Trade Desk

Log In

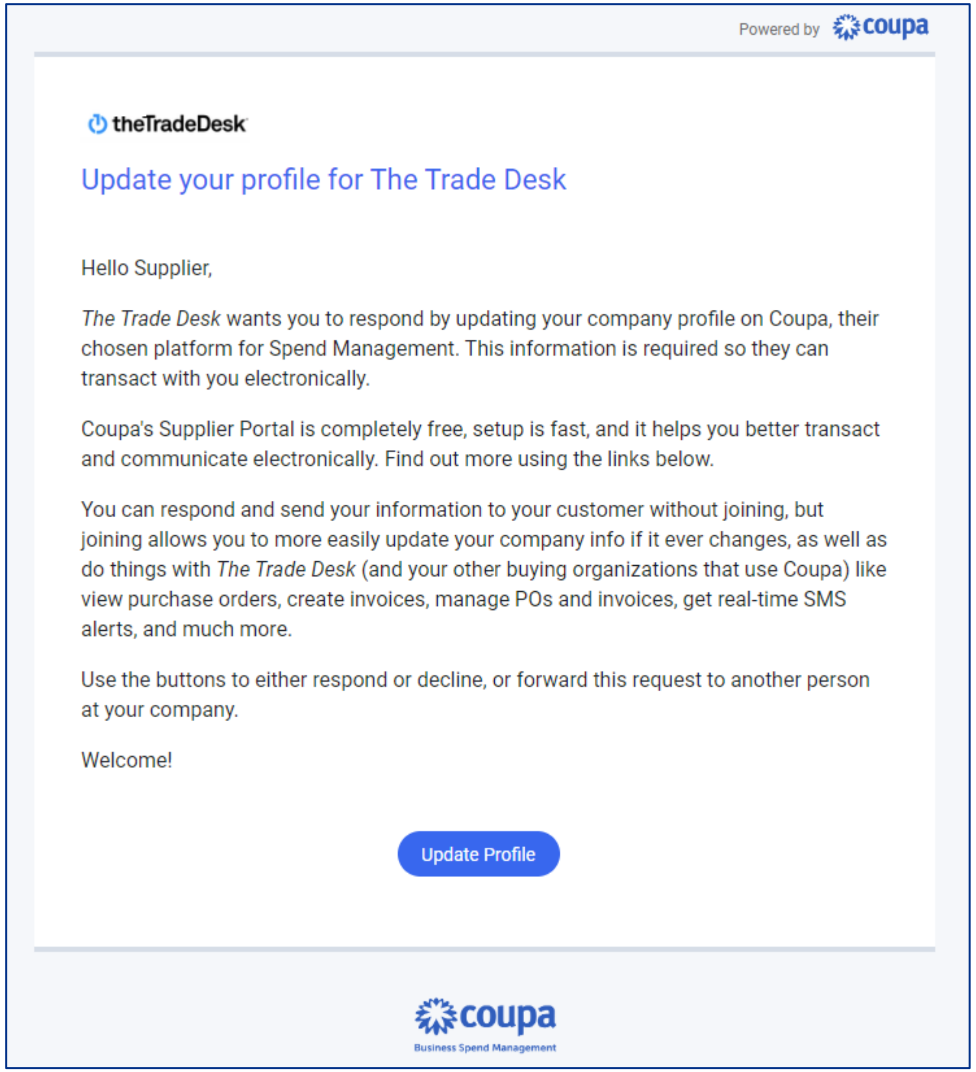
coupa
Business Spend Management

If The Trade Desk has the email associated with your CSP Account, we link your account. You will receive an email congratulating you on linking your account with us! You are now ready to transact with The Trade Desk.

When you need to update your information, contact The Trade Desk to receive our Update Information form.

05 Invitation to Update your Supplier Information

Invitation Requirements



Powered by coupa

theTradeDesk

Update your profile for The Trade Desk

Hello Supplier,

The Trade Desk wants you to respond by updating your company profile on Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

Coupa's Supplier Portal is completely free, setup is fast, and it helps you better transact and communicate electronically. Find out more using the links below.

You can respond and send your information to your customer without joining, but joining allows you to more easily update your company info if it ever changes, as well as do things with *The Trade Desk* (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

Use the buttons to either respond or decline, or forward this request to another person at your company.

Welcome!

Update Profile

coupa
Business Spend Management

Once your have created a CSP account, merged your account, or already have a CSP account connected to The Trade Desk, you will need to receive a request to update your information using the Supplier Information update form.

By selecting **Update Profile**, you will be directed to login to your Coupa Supplier Portal, where you will be actioned to update your information.

NOTE: If you do not have a CSP account , you will need to receive a request to join the CSP. Once your CSP portal has been created, we can send you a Supplier Information Update form. If you have a CSP account not connected to The Trade Desk, provide us with the contact email associated with your CSP account to link your account and update your information.

06 Supplier Information Update Form Guide

Updating your Supplier Information

Prior to updating your information, it is important to **contact the Accounts Payable team** for guidance on when a change through the CSP is required.

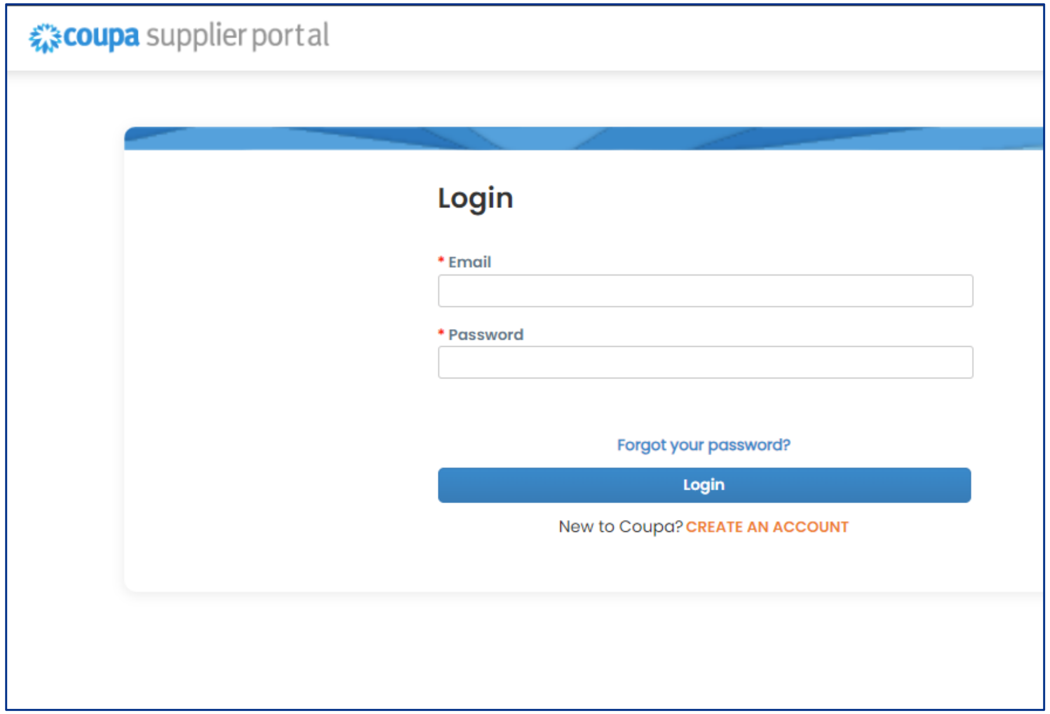
Items to keep in mind when updating your information include:

If you are only updating an email or address information and do not need to update your banking details, please contact The Trade Desk for assistance.

Tax Information should stay consistent and not be changed. If your business obtains a new Tax ID from your Tax Authority, and if you are already an active supplier with The Trade Desk, a new supplier record will need to be created. It is recommended suppliers contact The Trade Desk when Tax information is changed to ensure your information is accurately depicted in our database.

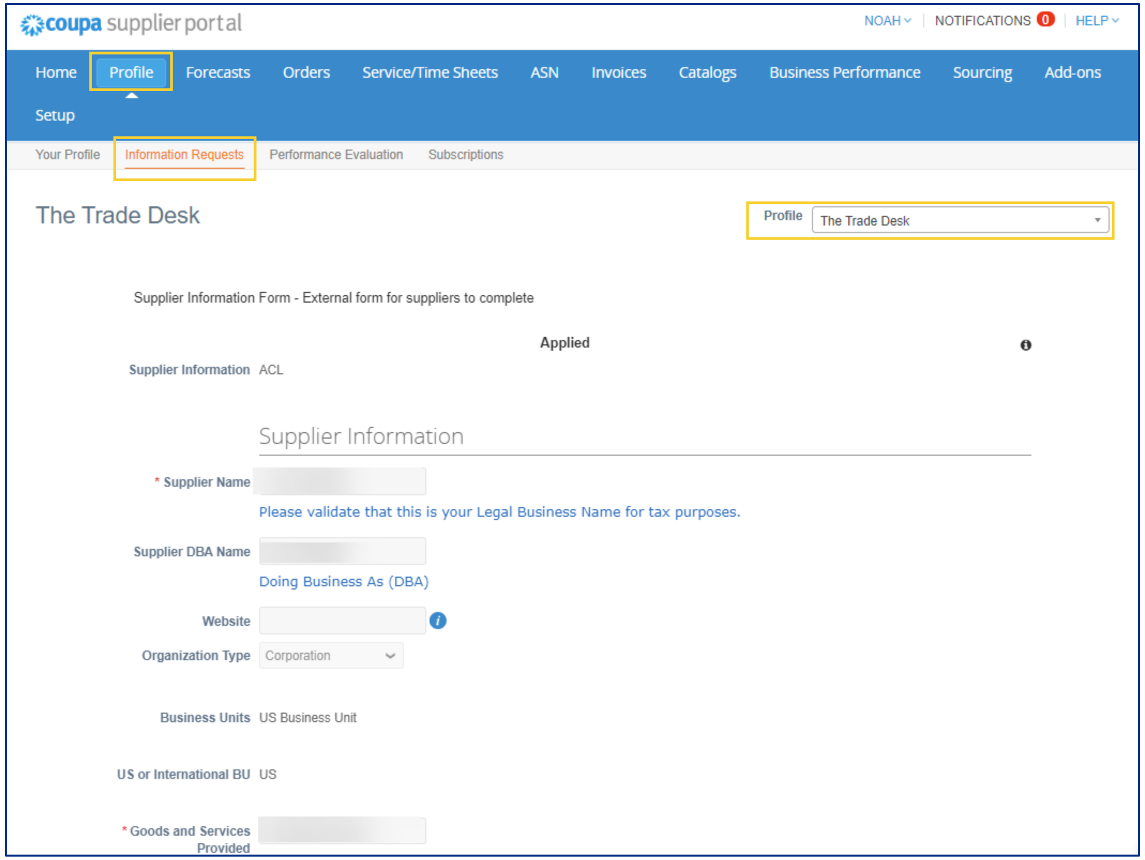
The Trade Desk's preferred payment method is Credit Card. It is your responsibility as the Supplier to ensure there is no additional fee charged to The Trade Desk. The amount issued for payment, is the amount reflected on your invoice.

Supplier Information Update Form – Login



To update your information with The Trade Desk, login to your CSP account by entering the email address and password you used with registering for an account.

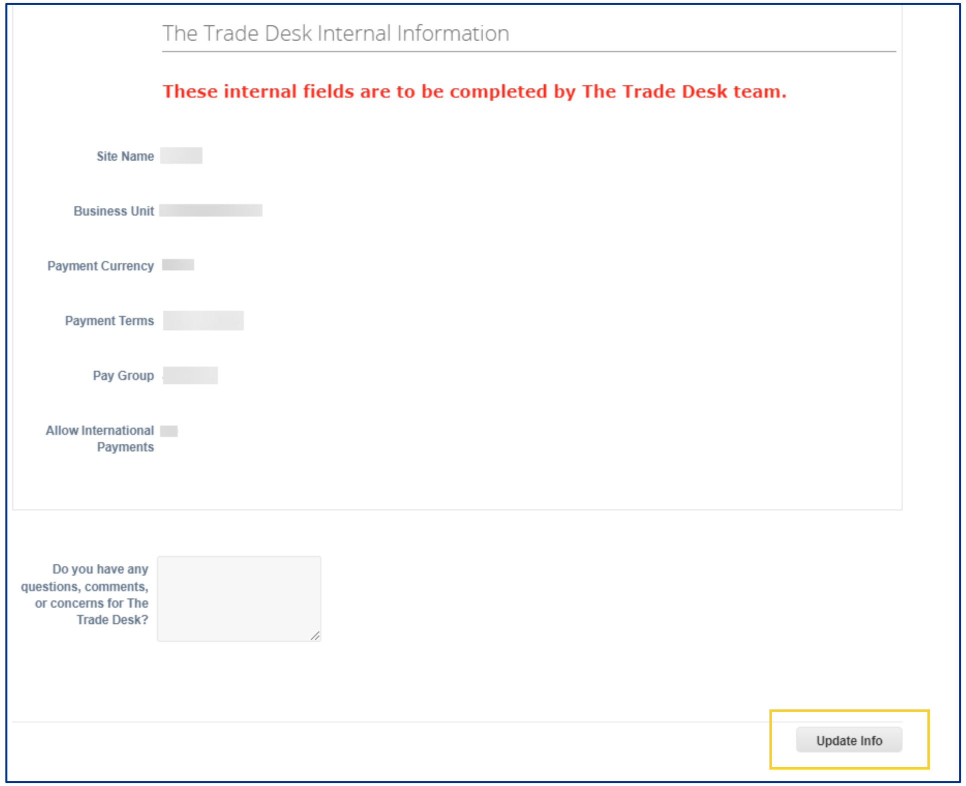
Supplier Information Update Form – Information Request



Once you are logged in, click on the **Profile** tab and click on **Information Requests** subtab.

NOTE: To ensure The Trade desk has your company's latest information, please make sure the profile is set with **The Trade Desk**.

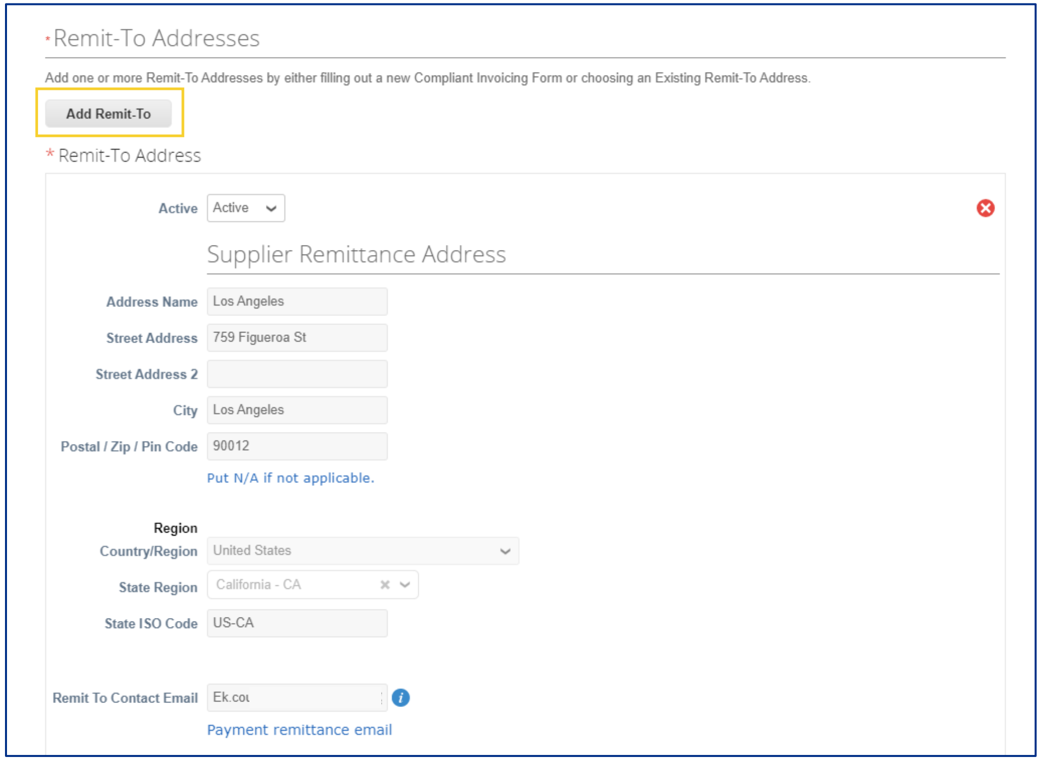
Supplier Information Update Form – Update Info



Scroll to the bottom, select **Update Info.**

NOTE: The Update Info button is only available when the original form has been approved by The Trade Desk. If you see a **Withdraw** button, the original form has not been approved by The Trade Desk. Click on the Update Info or Withdraw button if you need to make an update to your profile.

Supplier Information Update Form – Add Remit-To

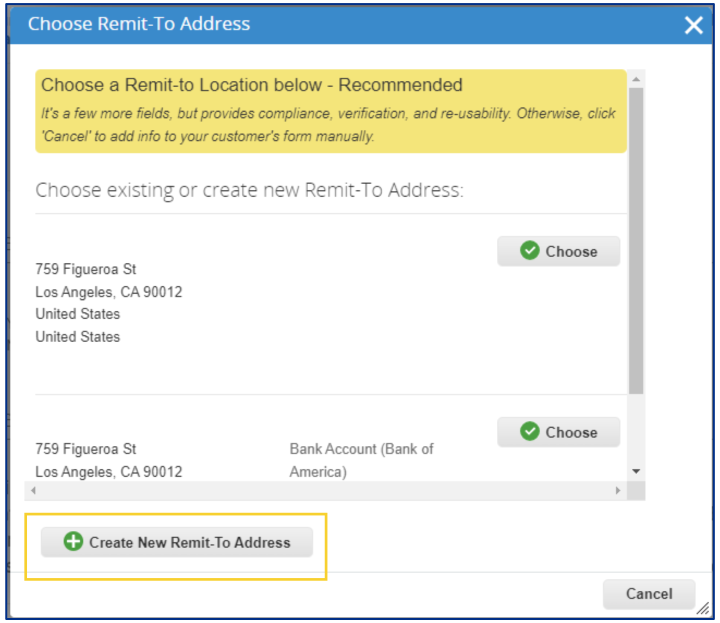


The form is now in edit mode. All fields are editable, except for your existing Remit-To section.

DO NOT change the status by deactivating or deleting your existing information. Changing the status or deleting can delay and cause errors to transactions which may be inflight or pending payment.

For any bank changes or updates to your bank account, you will need to add a new remit-to address by clicking **Add Remit-To**.

Supplier Information Update Form – Add Remit-To

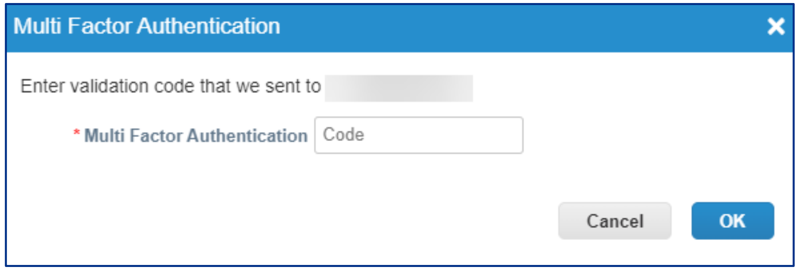


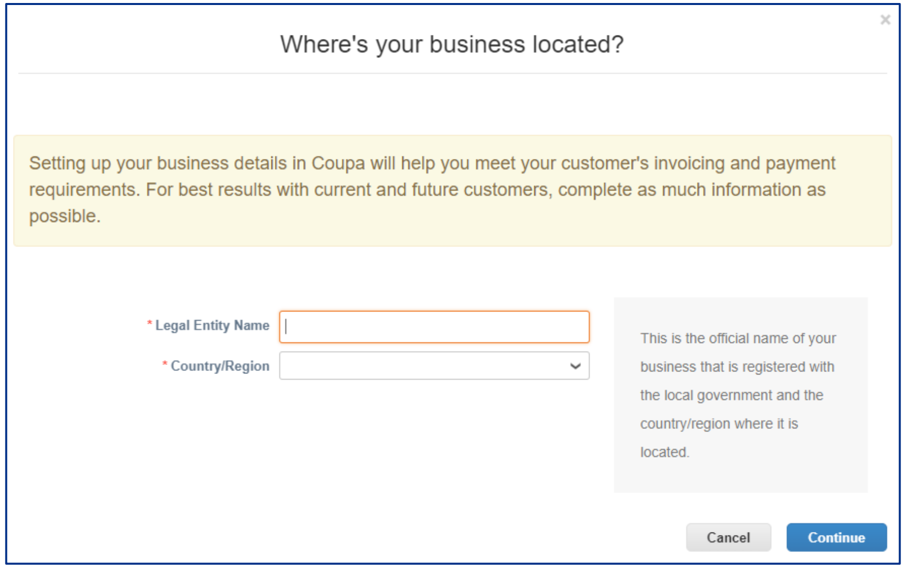
Once selecting Add Remit-To, you will receive a popup to **Choose Remit-To Address**.

Select the correct remit to which matches your company information. **DO NOT** choose the option with banking details. If you choose the option with banking details, you will not be able to update the information.

If you do not see the remittance address, select **Create New Remit-To Address**. Follow the prompts to create and add your updated information.

Supplier Information Update Form – Add Remit-To

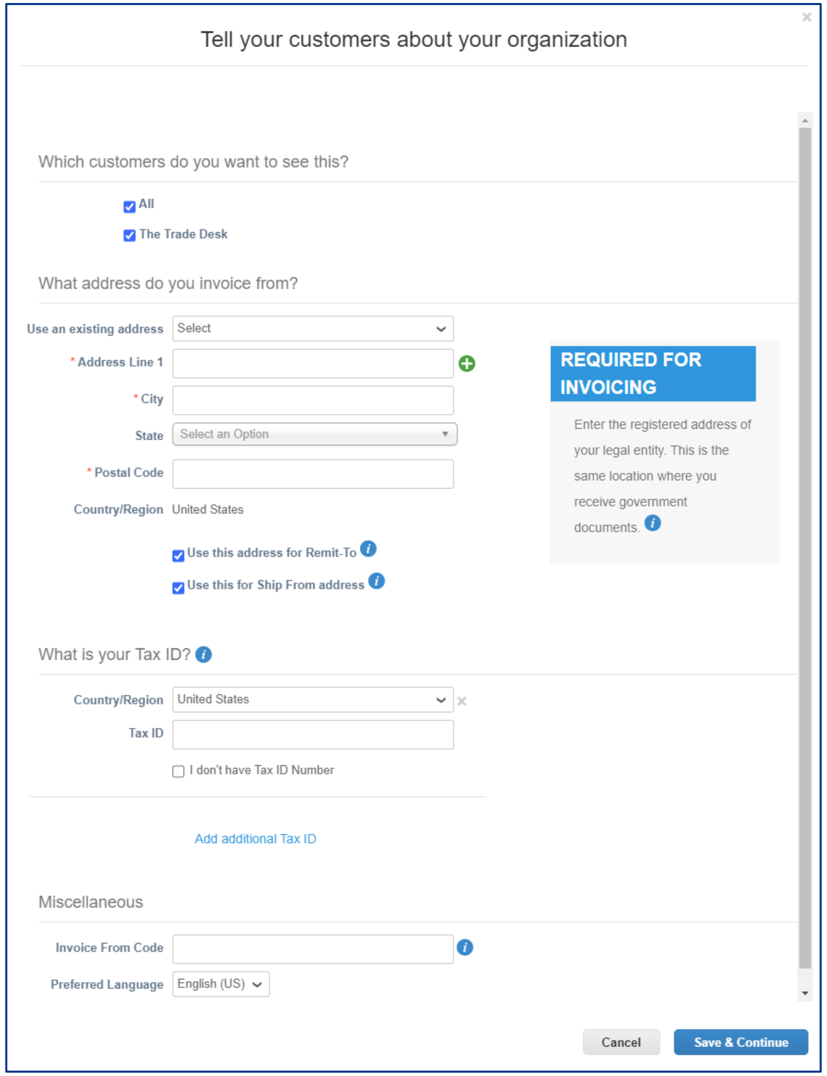




You will be prompted to authenticate your request. Coupa will send a notification with a verification code using the verification process selected when you created and registered your CSP account. Enter your verification code.

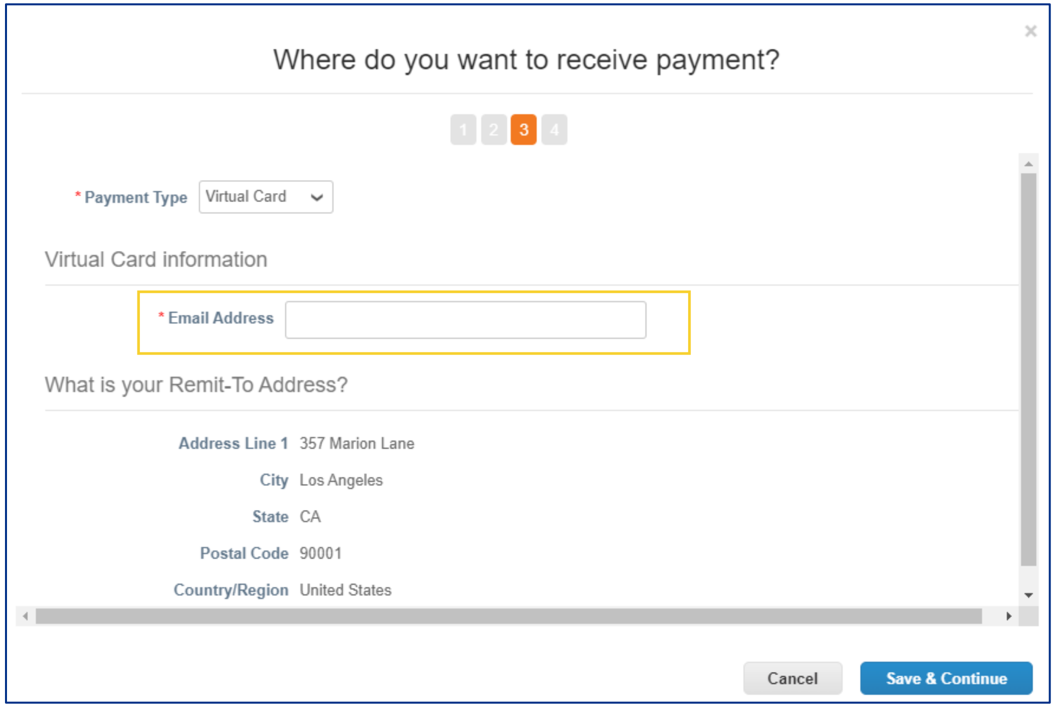
Complete the **Where's your business located?** prompt and select **Continue**.

Supplier Information Update Form – Add Remit-To



Complete the **Tell your customers about your origination** section, while being sure to select The Trade Desk to see your information and **Save & Continue**.

Supplier Information Update Form – Add Remit-To

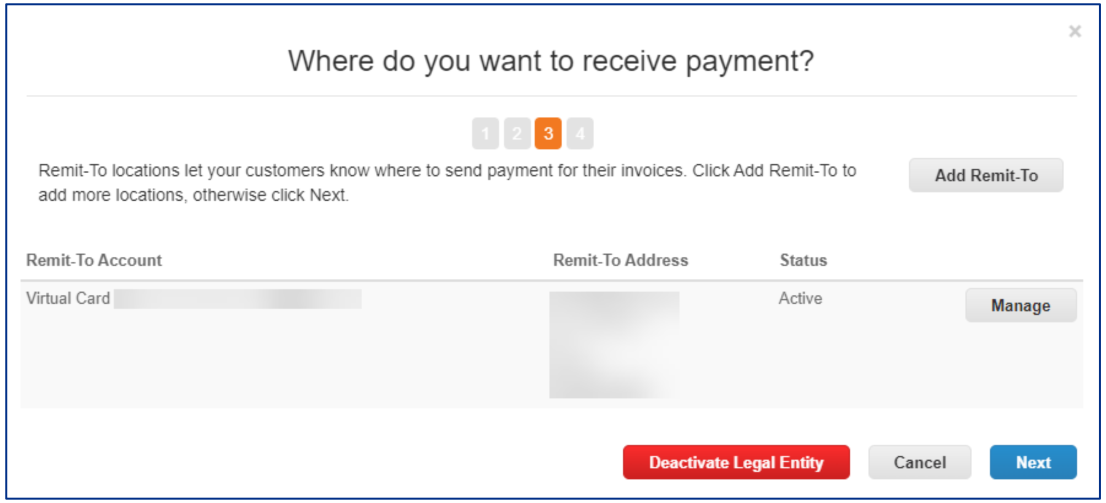


Where do you want to receive payment section will allow you to select how you want to receive payment. The Trade Desk preferred method is Virtual Card. (No Fee should be applicable to The Trade Desk, if you select Virtual Card)

Enter the required email address where virtual payment can be received.

Click **Save & Continue**.

Supplier Information Update Form – Add Remit-To

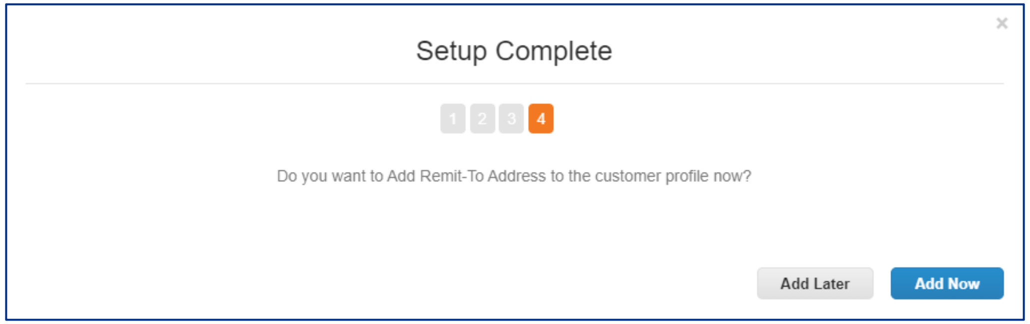


You will have an opportunity to review the details of the information you entered.

If all information look's correct, select **Next** to continue.

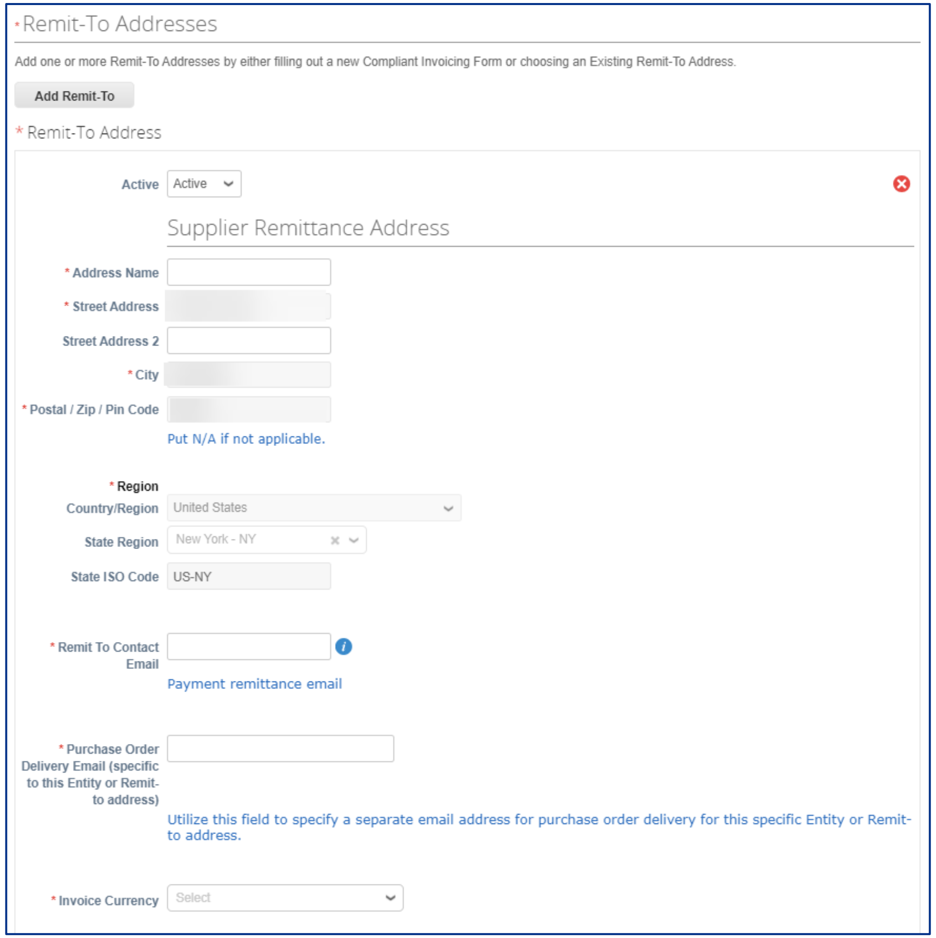
You will have an option to add another remit-to address, manage the remit-to address you just created, and deactivate the legal entity if details were entered incorrectly.

Supplier Information Update Form – Add Remit-To



Setup Complete screen will then pop-up. Click **Add Now** to move forward with the process.

Supplier Information Update Form – Add Remit-To


* Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

* Remit-To Address

Active: Active

Supplier Remittance Address

* Address Name
* Street Address
Street Address 2
* City
* Postal / Zip / Pin Code

Put N/A if not applicable.

* Region
Country/Region: United States
State Region: New York - NY
State ISO Code: US-NY

* Remit To Contact Email

Payment remittance email

* Purchase Order Delivery Email (specific to this Entity or Remit-to address)

Utilize this field to specify a separate email address for purchase order delivery for this specific Entity or Remit-to address.

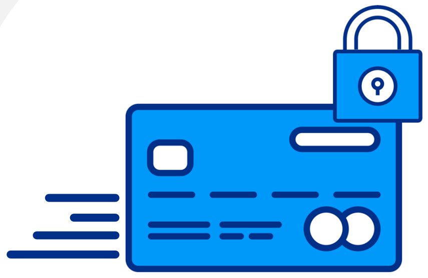
* Invoice Currency: Select

The Trade Desk form will populate and under the **Remit-To Address** section you will be able to complete the required information.

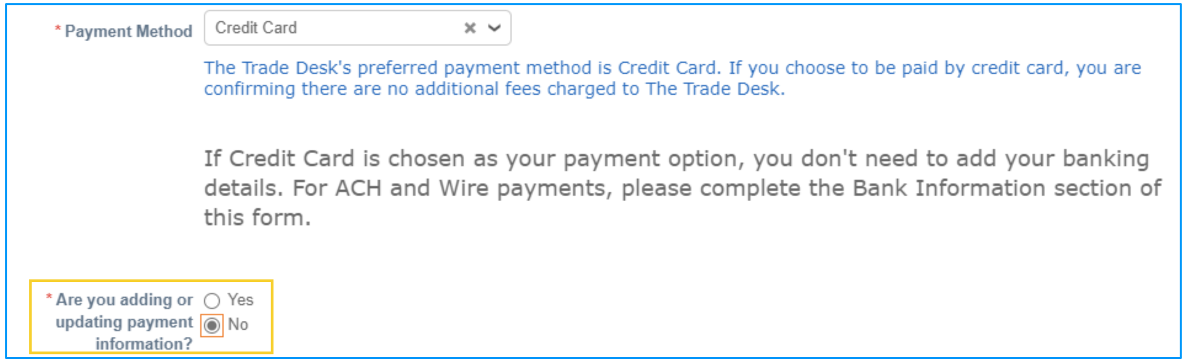
Supplier Information Update Form – Payment Method Guide

The Trade Desk approved forms of payments are Credit Card, ACH, and Wire. **We do not offer check payments.**

The Trade Desk requires a **Fraud Prevention Verbal Verification** to be conducted when banking information is added or if there is a change on a supplier record prior to payment. If **Credit Card** is your preferred method of payment, you **will not be required** to conduct a verbal verification.



Payment Method – Credit Card


* Payment Method: Credit Card

The Trade Desk's preferred payment method is Credit Card. If you choose to be paid by credit card, you are confirming there are no additional fees charged to The Trade Desk.

If Credit Card is chosen as your payment option, you don't need to add your banking details. For ACH and Wire payments, please complete the Bank Information section of this form.

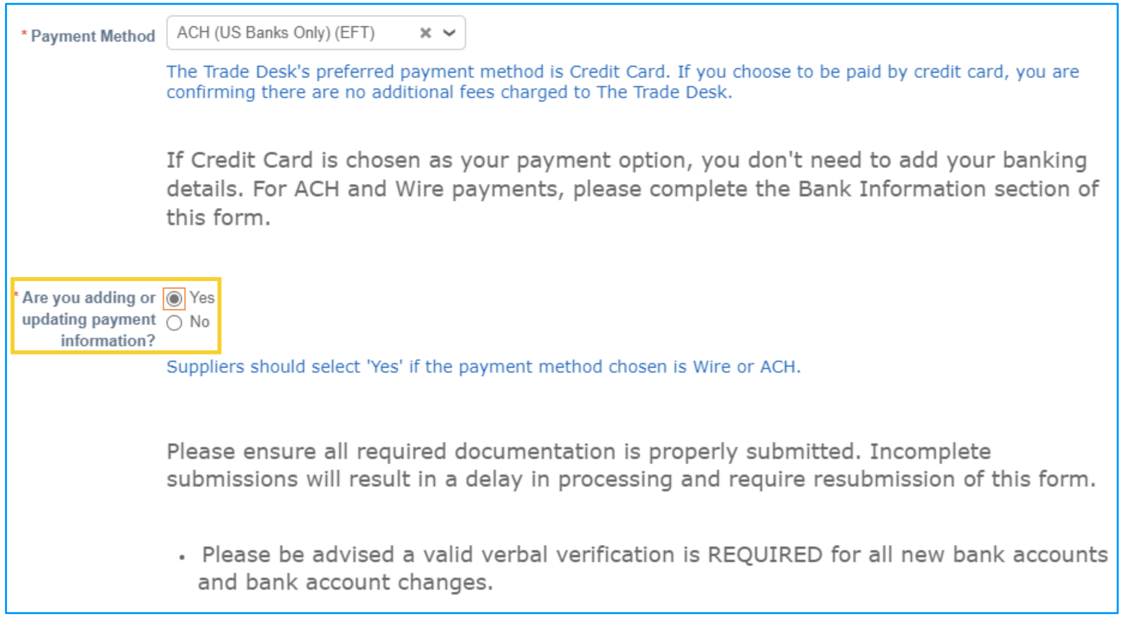
* Are you adding or updating payment information? Yes / No

The Trade Desk's default preferred payment method is Credit Card.

NOTE: If you choose to be paid by Credit Card, you are confirming there is **no additional fee and/or processing fee charged** to The Trade Desk.

If you selected to be paid by Credit Card, you are not required to provide additional banking information.

Payment Method – ACH



* Payment Method: ACH (US Banks Only) (EFT)

The Trade Desk's preferred payment method is Credit Card. If you choose to be paid by credit card, you are confirming there are no additional fees charged to The Trade Desk.

If Credit Card is chosen as your payment option, you don't need to add your banking details. For ACH and Wire payments, please complete the Bank Information section of this form.

* Are you adding or updating payment information? Yes / No

Suppliers should select 'Yes' if the payment method chosen is Wire or ACH.

Please ensure all required documentation is properly submitted. Incomplete submissions will result in a delay in processing and require resubmission of this form.

- Please be advised a valid verbal verification is REQUIRED for all new bank accounts and bank account changes.

ACH is a payment method which can be utilized to be used to and from **United States Banks**.

In addition to US banks, ACH can be used to make a local payment in Hong Kong through the local clearing system known as **Hong Kong Interbank Clearing Limited (HKICL).** For the requirements for ACH see the next slide.

If you choose ACH, Select **Yes**, under **Are you adding or updating payment information?** to add your banking details. For additional step-by-step guidance skip ahead to the instruction for Adding Banking Details.

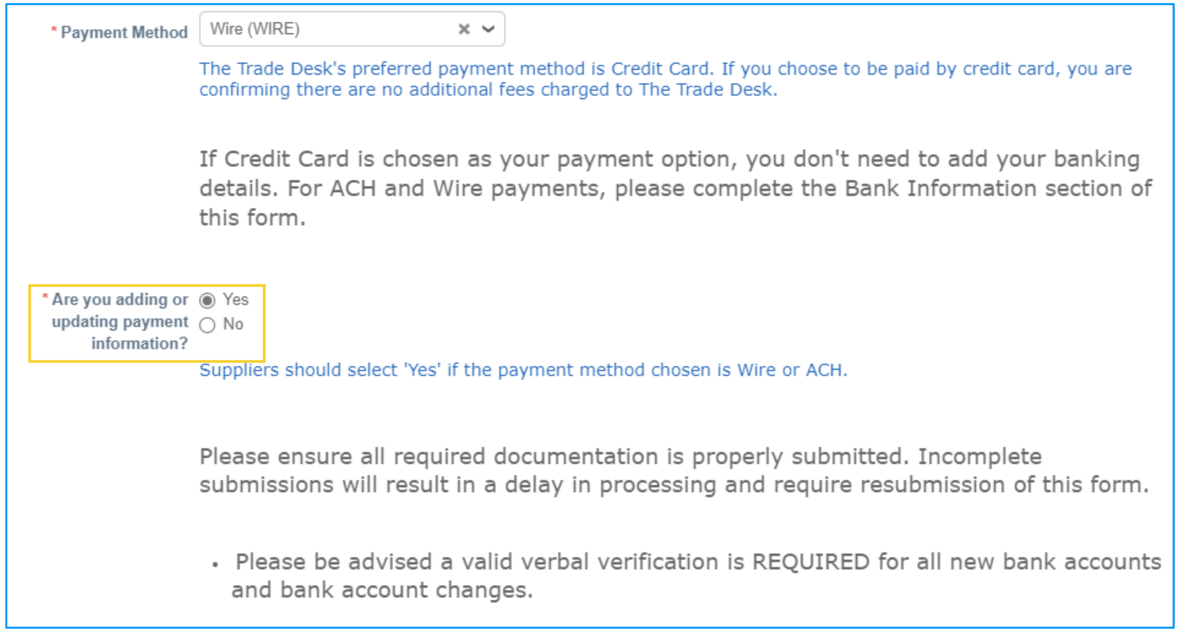
Payment Method – ACH - Requirements

If you are using a **US bank**, you will be required to add a **routing** number and **account number**.

If you are using **HKICL**, we will need the following bank details to issue payment:

- **Bank Name**: The official name of the bank holding the supplier’s account.
- **Bank Code**: A 3-digit code that identifies the recipient's bank in Hong Kong.
- **Branch Code**: A 3-digit code that identifies the specific branch of the bank where the recipient's account is held.
- **Account Number**: The full bank account number of the recipient.
- **Account Name**: The name of the account holder as recognized by the bank. This should match the name provided in the payment details to avoid any discrepancies.

Payment Method – Wire



* Payment Method: Wire (WIRE)

The Trade Desk's preferred payment method is Credit Card. If you choose to be paid by credit card, you are confirming there are no additional fees charged to The Trade Desk.

If Credit Card is chosen as your payment option, you don't need to add your banking details. For ACH and Wire payments, please complete the Bank Information section of this form.

* Are you adding or updating payment information? (●) Yes ( ) No

Suppliers should select 'Yes' if the payment method chosen is Wire or ACH.

Please ensure all required documentation is properly submitted. Incomplete submissions will result in a delay in processing and require resubmission of this form.

- Please be advised a valid verbal verification is REQUIRED for all new bank accounts and bank account changes.

Wire is a payment method which can be used by all banks globally. Select **Yes**, under **Are you adding or updating payment information?** to add your banking details.

For additional step-by-step guidance skip ahead to the instruction for Adding Banking Details.

Payment Method – Wire - Requirements

If you are expecting a **Wire** payment, some countries require specific fields to have a successful payment.

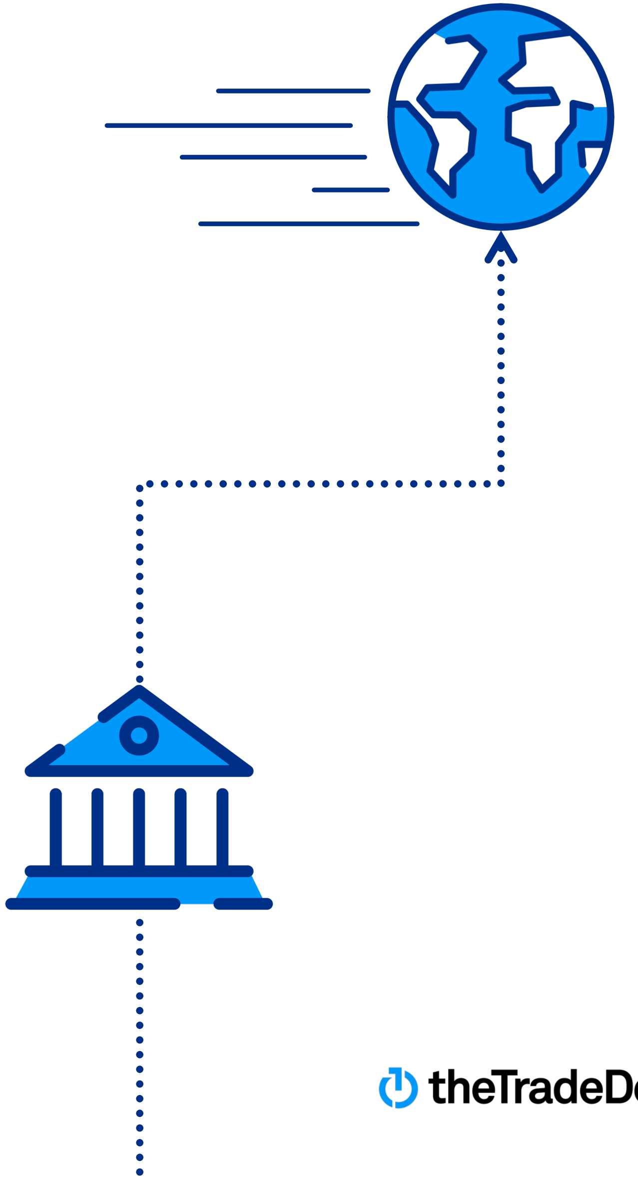
Suppliers utilizing **Australia Banks**, please add your BSB Number.

India Banks, please add your IFSC Code.

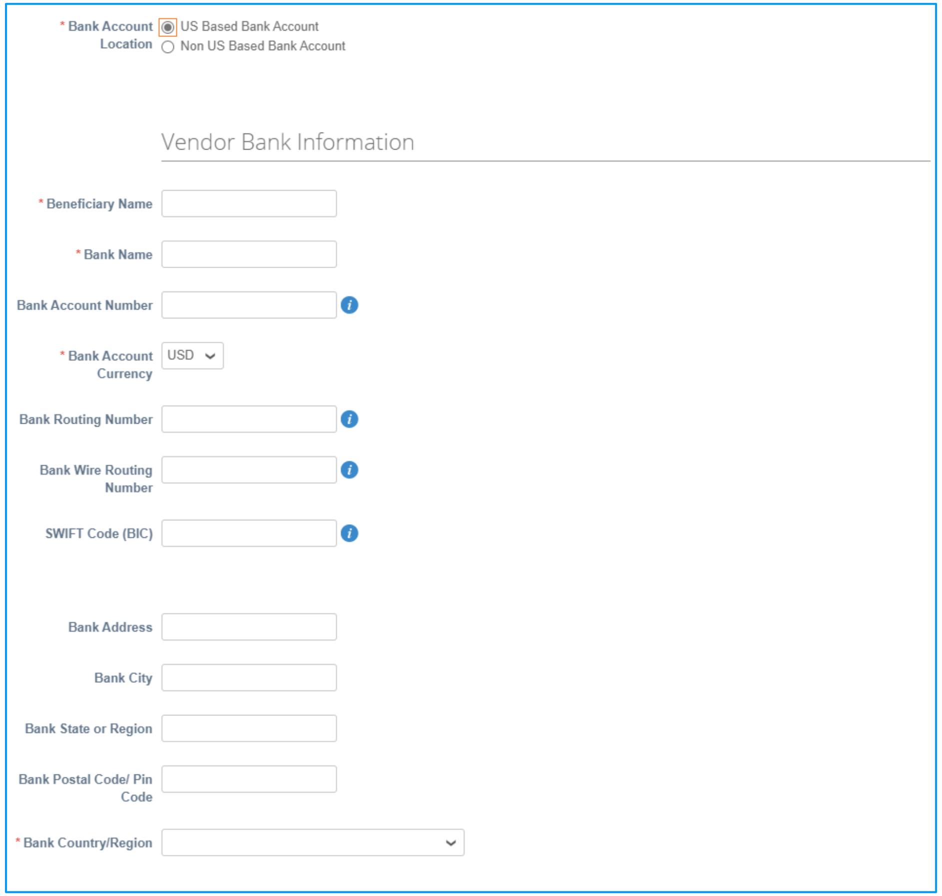
Transit Number and Institution Number is required for **Canada Suppliers**

If you are expecting a Wire payment for **Hong Kong**, you will typically need the following banking details:

- **Beneficiary Name**: The name of the company or individual receiving the funds.
- **Beneficiary Bank Name**: The official name of the bank holding the supplier's account.
- **Beneficiary Account Number**: The full bank account number of the recipient.
- **SWIFT/BIC Code:** The SWIFT or BIC code of the recipient's bank, utilized for international transfers.
- **Bank Address**: The Address of the recipient's bank.



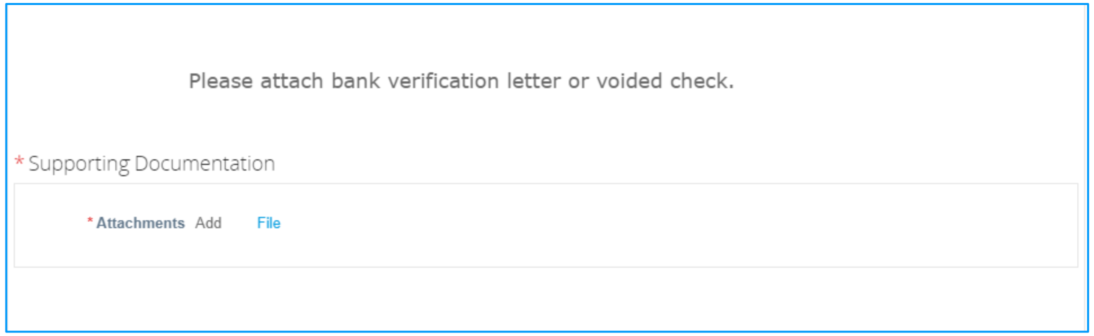
Payment Method – Adding Banking Details



For **ACH** and **Wire**, adding your banking details follows a similar process. Please be sure to refer to the requirements listed in previous slides for each payment method.

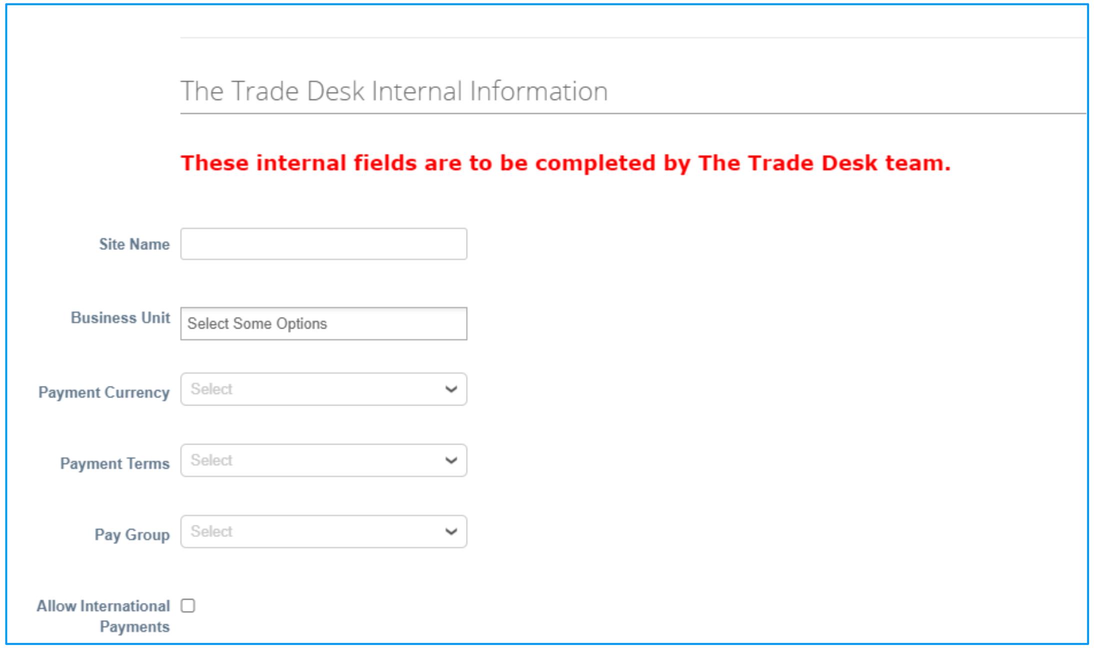
NOTE: If your invoice is in another currency than your bank account currency, please contact The Trade Desk Accounts Payable team.

Payment Method – Required Banking Documentation


Please attach bank verification letter or voided check.

* Supporting Documentation

* Attachments Add File


The Trade Desk Internal Information

These internal fields are to be completed by The Trade Desk team.

Site Name

Business Unit Select Some Options

Payment Currency Select

Payment Terms Select

Pay Group Select

Allow International Payments

Attach a **valid bank provided verification letter or voided check.**

Attach the required banking documentation to avoid delay in onboarding and payments.

Under The Trade Desk Internal Information section, kindly leave blank. These are internal fields to be completed by The Trade Desk.

Banking Documentation Requirements by Country

United States Suppliers	Voided check or bank account details on bank letterhead confirming full account information.
International Suppliers	Bank letter and/or company details on letterhead confirming full account information.

Verbal Verification - Requirements

With cybercrime on the rise, The Trade Desk takes every precaution to ensure valid information is received.

A **verbal banking verification is required** for every bank addition and/or bank changes on a supplier record before a payment can be made. The Trade Desk will contact your company independently requesting confirmation of the banking details provided.

Additionally, you will be **required to provide documentation with your company banking information**. This will be referenced during the verbal verification call.

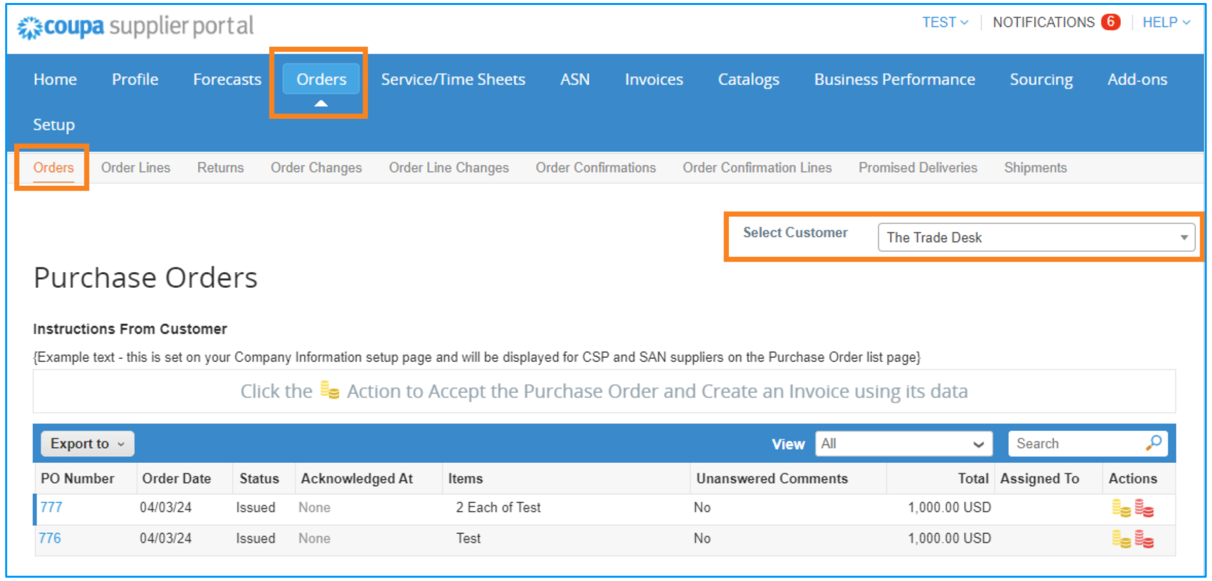
Bank letters and voided checks are accepted by The Trade Desk as backup documentation. **Bank Letter** must contain full account information from your banking institution. **Voided Check** as an image or picture is also acceptable, as long as the complete account information is visible. Temporary checks are not acceptable.

07 Purchase Order Guide

View and Manage Purchase Orders

Within the CSP you can view **Purchase Orders** created by The Trade Desk. You also have some actions you can do on the PO depending on the PO status. Soft Closed POs do not have actions available while issued POs have actions available.

Manage Purchase Orders in CSP



Navigate to Orders Tab and select The Trade Desk from the Select Customer dropdown.

Read The Trade Desk instructions.

All PO's Created by The Trade Desk should be visible in the Purchase Order table.

Actions on the PO are visible to the right of the table.

Under the Actions column in the Purchase Order table, Icons can be utilized for seamless processing.

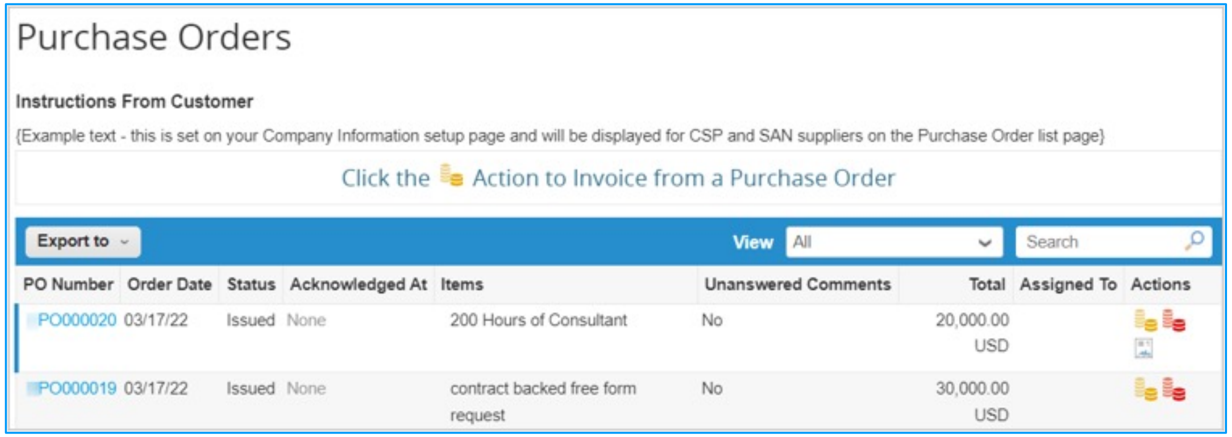
- Create (flip the PO into) an invoice
- Create a credit note
- Create (flip the PO into) an advance ship notice (ASN)

theTradeDesk

Purchase Order Status Glossary

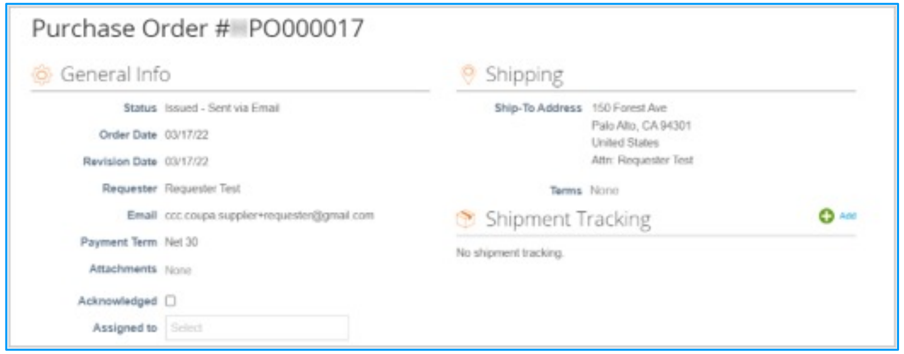
PO Status	Description
Issued	PO is approved and ready to be invoiced.
Soft Closed	PO is closed but can be reopened if an invoice or credit note is required.
Closed	PO is closed and cannot be reopened. POs in closed status cannot be invoiced again.
Cancelled	PO is cancelled by the buyer. No further action is available for this PO.
Buyer Hold	The PO is approved but requires The Trade Desk to review it.
Currency Hold	The PO is on hold due to a currency exchange rate issue.
Supplier Window Hold	The PO was approved outside of the order window schedule under contract terms.
Error	Something is wrong with the PO. Contact The Trade Desk to get the PO back on track.

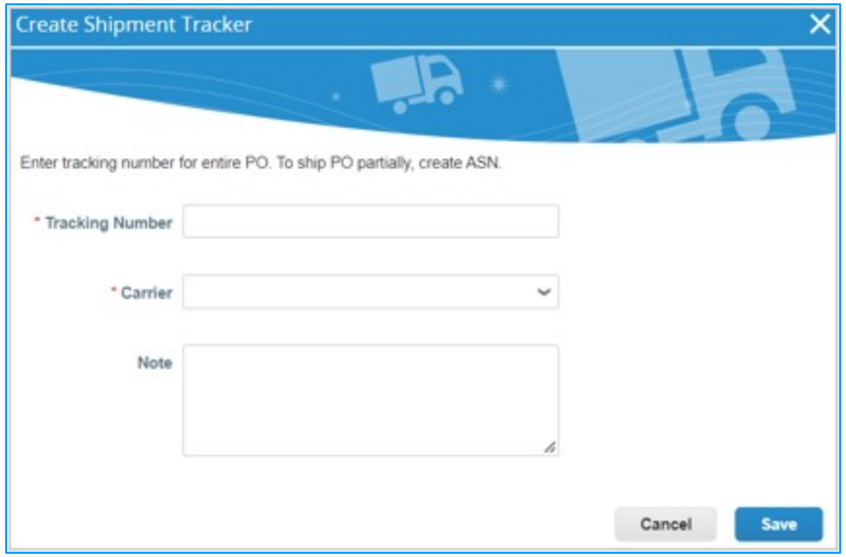
Manage Purchase Orders in CSP

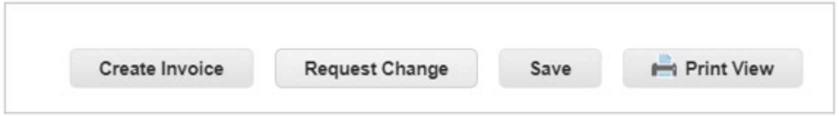


Under the Orders tab, click the PO to be acknowledged.

Manage Purchase Orders in CSP







To add shipping and tracking details, click on the green “Add” button under Shipment tracking.

To acknowledge, tick the “Acknowledged” field.

Populate the tracking number, carrier, and any additional notes. Details will be visible to the buyer in Coupa.

Save to apply changes on the PO.

08 Supplier Actionable Notice (SAN)

theTradeDesk

SUPPLIER ACTIONABLE NOTICE (SAN)

Manage your Purchase Order

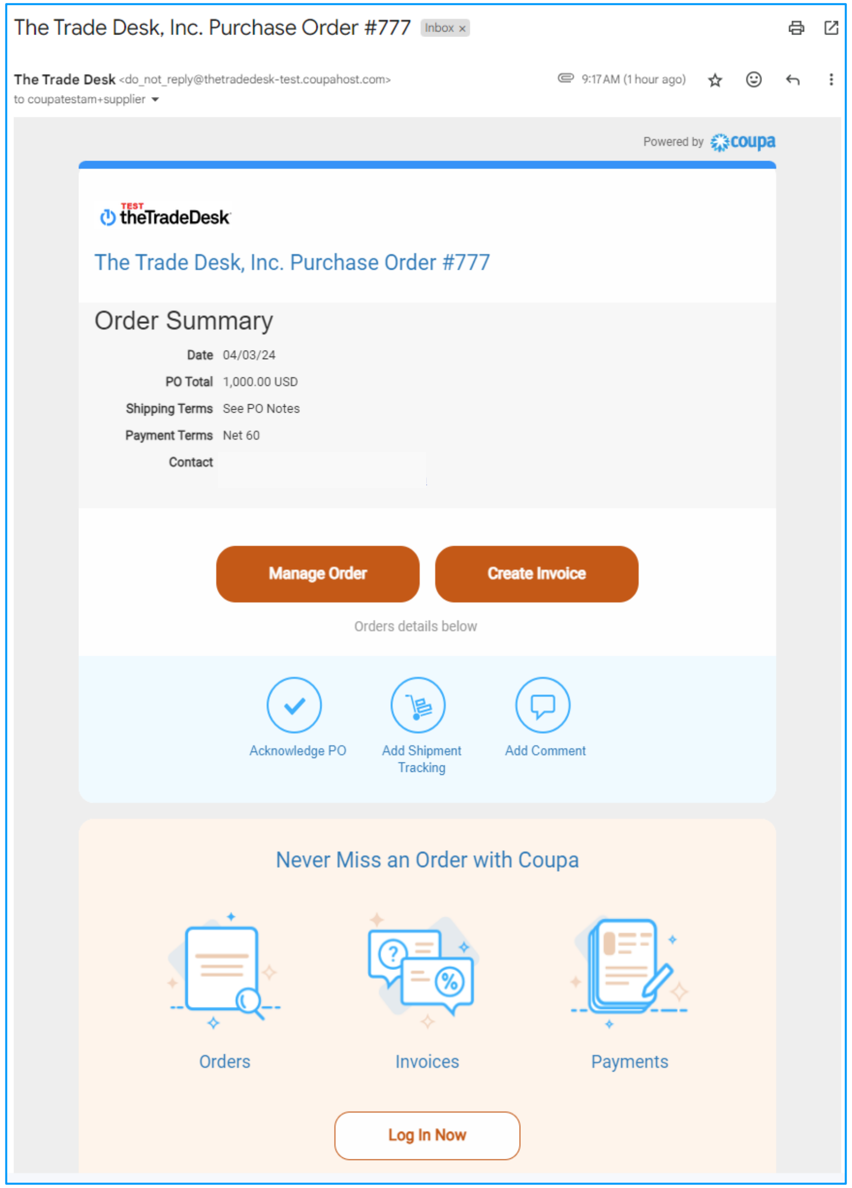
Supplier Actionable Notifications (SAN) allow you to interact with The Trade Desk without a Coupa Supplier Portal (CSP) account. You can acknowledge purchase orders, submit invoices, or add comments directly from Coupa's email notifications.

You'll get notifications upon submitting an invoice to The Trade Desk, along with updates on our actions to your invoice, enhancing transparency and minimizing the need for you as the suppliers to inquire via phone or email.

From the email you will have the option to:

- Manage Order
- Create Invoice
- Acknowledge PO
- Add Shipment Tracking
- Add Comment
- Review Payment information
- Log In Now to your CSP account (CSP account holders)

NOTE: If you have a CSP account, please provide the email associated with your CSP account to your contact at The Trade Desk.

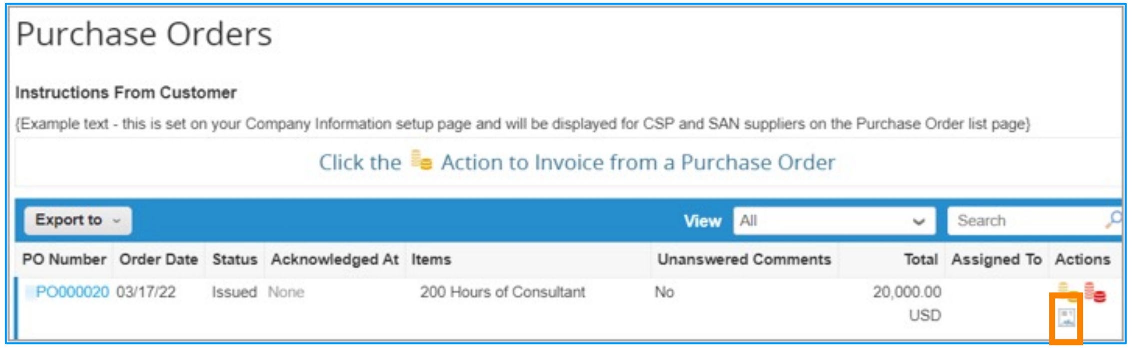


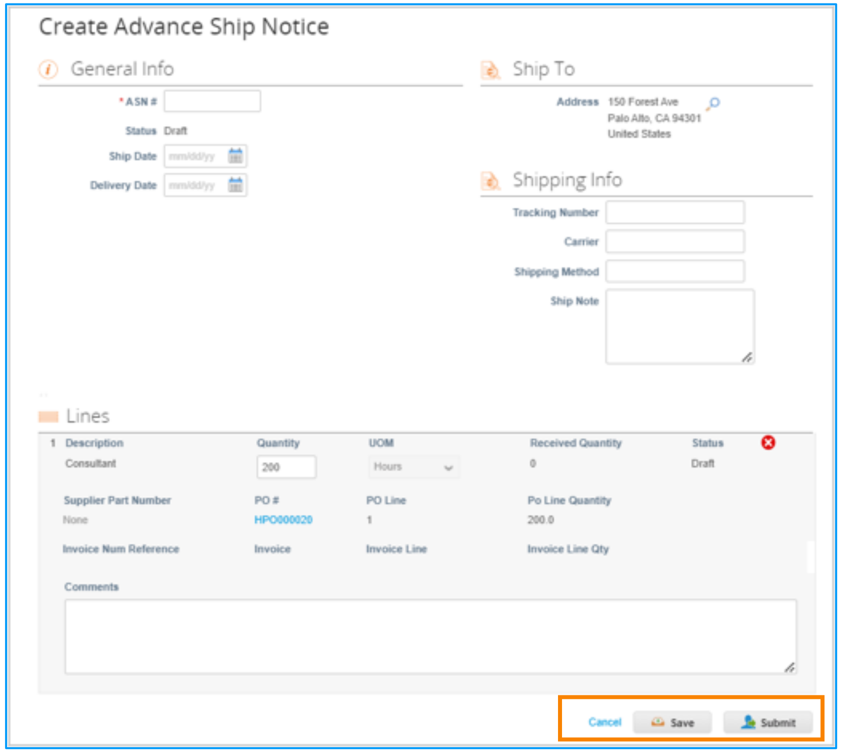
theTradeDesk

09 Advance Ship Notice (ASN)

theTradeDesk

Advance Ship Notice





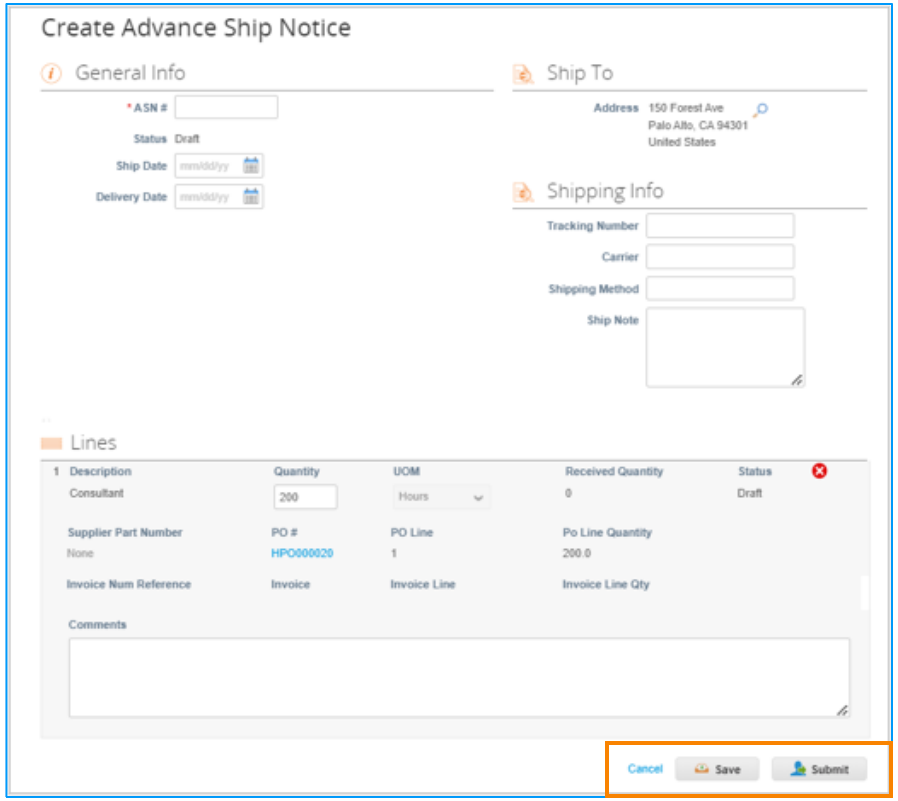
When you receive a purchase order, you can flip it into an ASN and send it to The Trade Desk by clicking on the Flip to ASN icon from the purchase orders list.

Populate the ASN#, Ship & Delivery Date, Shipping Information, and Quantity Shipped. Add comments to buyer as needed.

Save for later or submit.

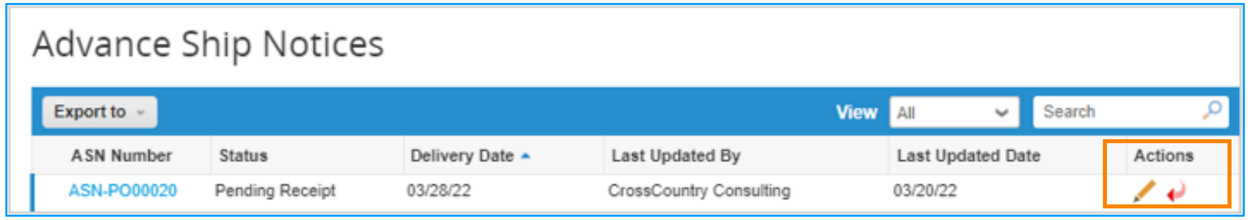
ADVANCE SHIP NOTICE (ASN)

Advance Ship Notice



Populate the ASN#, Ship & Delivery Date, Shipping Information, and Quantity Shipped. Add comments to buyer as needed.

Save for later or submit.



Navigate to ASN tab to edit or cancel ASN.

theTradeDesk

10 Invoicing Overview

Non - PO Backed Invoice Submission

Invoices which **do not** have a Purchase Order can be submitted to The Trade Desk Accounts Payable email.

The Trade Desk requests a **PDF 'Text' document** be submitted for processing when submitting an invoice or credit memo via email.

Billed to The Trade Desk International entity's:

- ap.uk@thetradedesk.com

Billed to The Trade Desk United States entity:

- ap@thetradedesk.com

theTradeDesk

PO Backed Invoice Submission

Purchase Order Invoices can be submitted in multiple different methods. How the invoice is submitted depends on if the supplier is electronically enabled.

- **Coupa Supplier Portal (CSP)** – Suppliers can manage their account, view POs, and create invoices/credit notes.
- **Supplier Actionable Notifications (SAN)** – Suppliers not registered through CSP can create an invoice from a PO email.
- **Direct Connection (cXML)** – Punchout suppliers
- **Accounts Payable Email** – A PDF 'Text' document is needed when submitting your invoice via email.
  - Billed to The Trade Desk International entity's:
    - ap.uk@thetradedesk.com
  - Billed to The Trade Desk United States entity:
    - ap@thetradedesk.com

General Invoicing Requirements

The Trade Desk's standard invoice format is **PDF 'Text' Document** for non-compliant invoicing and US based suppliers.

- Invoice Date
- Invoice Number
- Full name and Address
- Remittance Address
- Supplier Bank Details
- The Trade Desk Legal Entity
- Payment Terms
- Invoice Description
- Service dates, if applicable
- Amount Due
- Currency and Foreign Currency rate, when applicable.
- Valid PO Number (when applicable)
- Project Number (when applicable)
- The Trade Desk contact person

If the invoice does not contain all the required information, it will be rejected by the Accounts Payable team and returned to you.

Payments will not be made on statements, quotes, estimates or pro-forma invoices.

Invoice billing entity **MUST** match billing entity set up on the PO or as per The Trade Desk signing entity on the work order/SoW/contract.

Invoicing Requirements - APAC

Billing **The Trade Desk Asia-Pacific entities require the following information**.

- ☑ Invoice Date
- ☑ Invoice Number
- ☑ Full name and Address
- ☑ Remittance Address
- ☑ Supplier Bank Details
- ☑ The Trade Desk Legal Entity
- ☑ Date of payment (if prepayment required
- ☑ VAT, GST or Tax Number of The Trade Desk Entity purchasing
- ☑ VAT, GST or Tax Number of Supplier if liable for VAT, GST or Tax
- ☑ "Reverse Charge" text, when applicable
- ☑ Good or Service provided including quantity and unit price
- ☑ Net and gross amount charged
- ☑ Amount Due
- ☑ Currency and Foreign Currency rate, when applicable.
- ☑ VAT/GST or Tax amount payable and currency
- ☑ VAT/GST or Tax percentage rate applied
- ☑ Valid PO Number
- ☑ Project Number, when applicable
- ☑ The Trade Desk contact person
- ☑ Payments will not be made on statements, quotes, estimates or pro-forma invoices.

If the invoice does not contain all the required information, it will be rejected by the Accounts Payable team and returned to you.

Invoice billing entity **MUST** match billing entity set up on the PO or as per The Trade Desk signing entity on the work order/SoW/contract.

11 Invoice and Credit Memo Processing through CSP

Create an Invoice or Credit Note and View Status in CSP

Suppliers who receive **purchase orders**, can **generate an invoice or credit note from your Coupa Supplier Portal**.

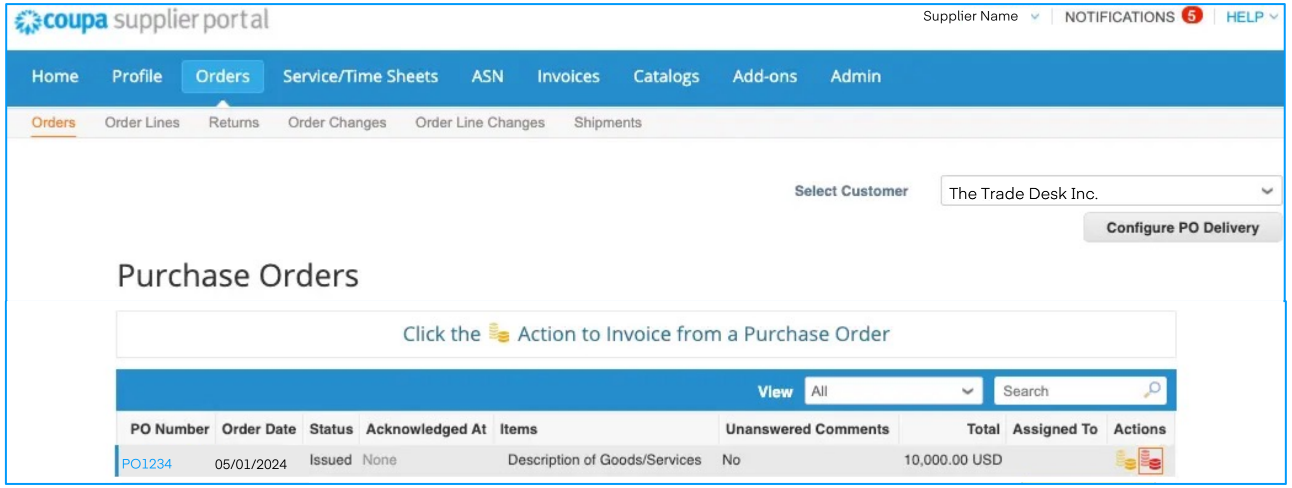
If you do not receive a PO, you will not be able to submit an invoice from the CSP. Please submit via email to our Accounts Payable teams:

- Billed to The Trade Desk International entity's:
  - ap.uk@thetradedesk.com
- Billed to The Trade Desk United States entity:
  - ap@thetradedesk.com

Invoice Glossary

Invoice Status	Description
Abandoned	Specific for compliant e-invoices for clearance countries. It indicates that a legal invoice form you sent failed validation. Invoices with this status are visible only to you, not to The Trade Desk.
Approved	The Invoice has been accepted for payment by The Trade Desk.
Disputed	The Invoice has been disputed. Additional information is displayed in the invoices table.
Draft	The Invoice has been created, but it has not been submitted The Trade Desk yet.
Invalid	Specific for compliant e-invoices for clearance countries. It indicates that a legal invoice form you sent failed validation. Invoices with this status are visible only to you, not to The Trade Desk.
Pending Approval	The Invoice is currently under review by The Trade Desk.
Processing	The Invoice is being processed by the system and should be paid soon.
Voided	Something is wrong with the invoice. Contact The Trade Desk to get the invoice back on track.

Create an Invoice in CSP

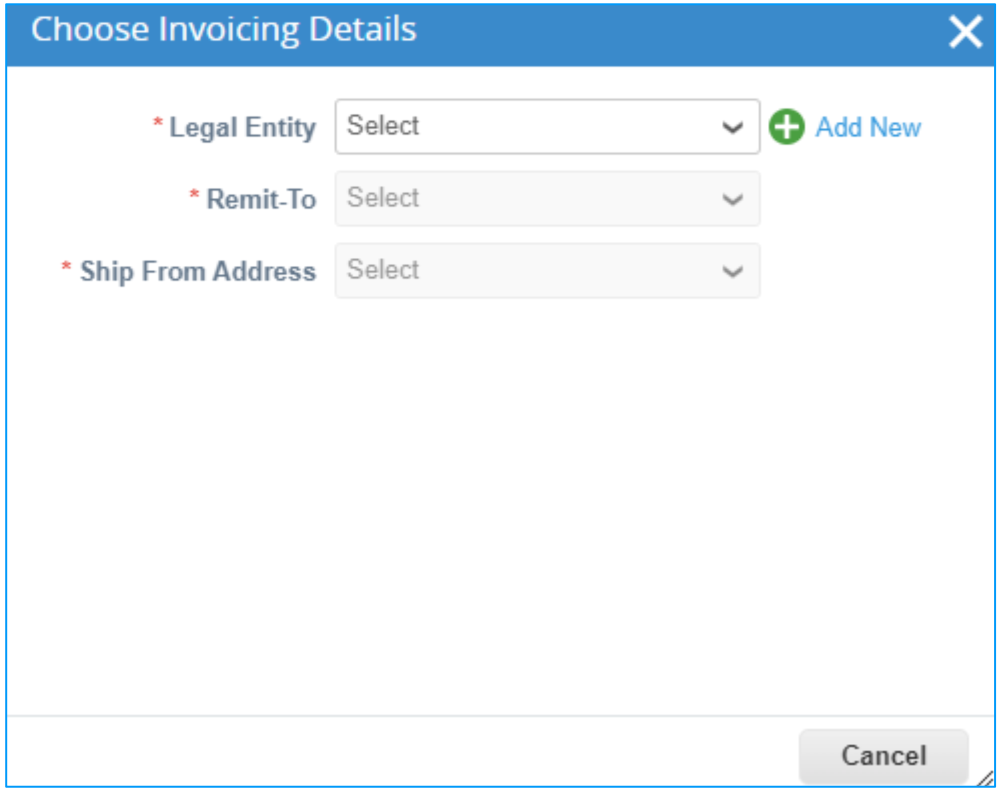


Once logged in to your CSP, click on the **Orders** tab to view your available POs with The Trade Desk.

Find the PO you need to invoice against and click on the gold coins icon to create an invoice.

To create a credit note, click on the red coins icon.

Create an Invoice in CSP



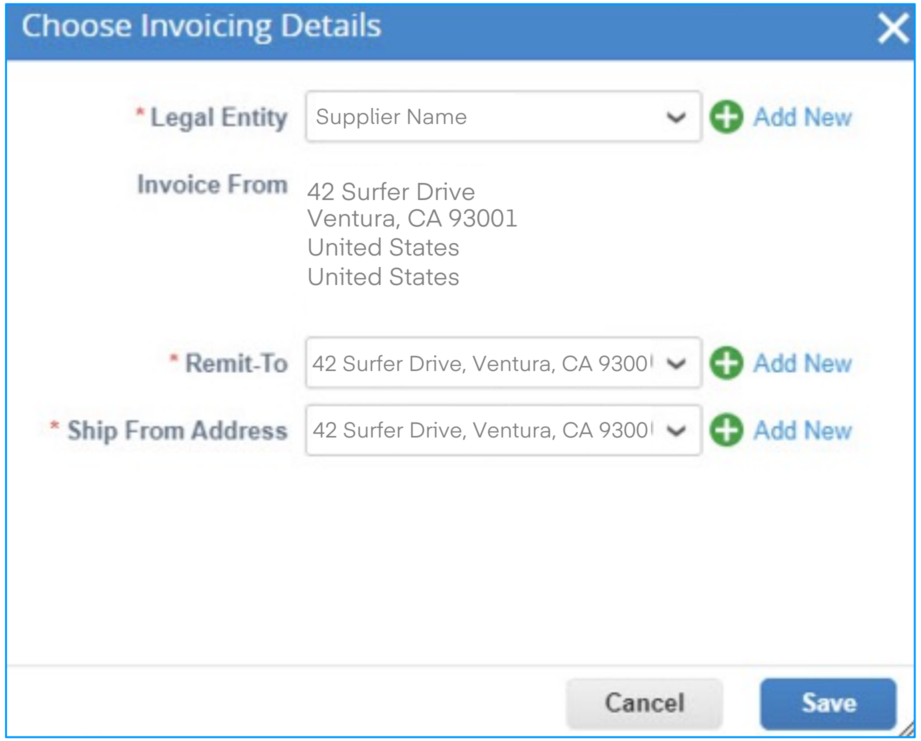
Choose Invoicing Details will appear if you have not created a legal entity.

Select your legal entity name in the drop-down.

IMPORTANT: For suppliers with multiple **Remit-To**, please be sure to select your **Remit-To** that aligns with the bank account you intend to receive payment **before** entering invoice details. If you do not select your Remit-To, the submission will fail, and your invoice entry form will be reset to blank.

If you do not see a Remit-To where your correct payment information is stored, you MUST UPDATE your profile.

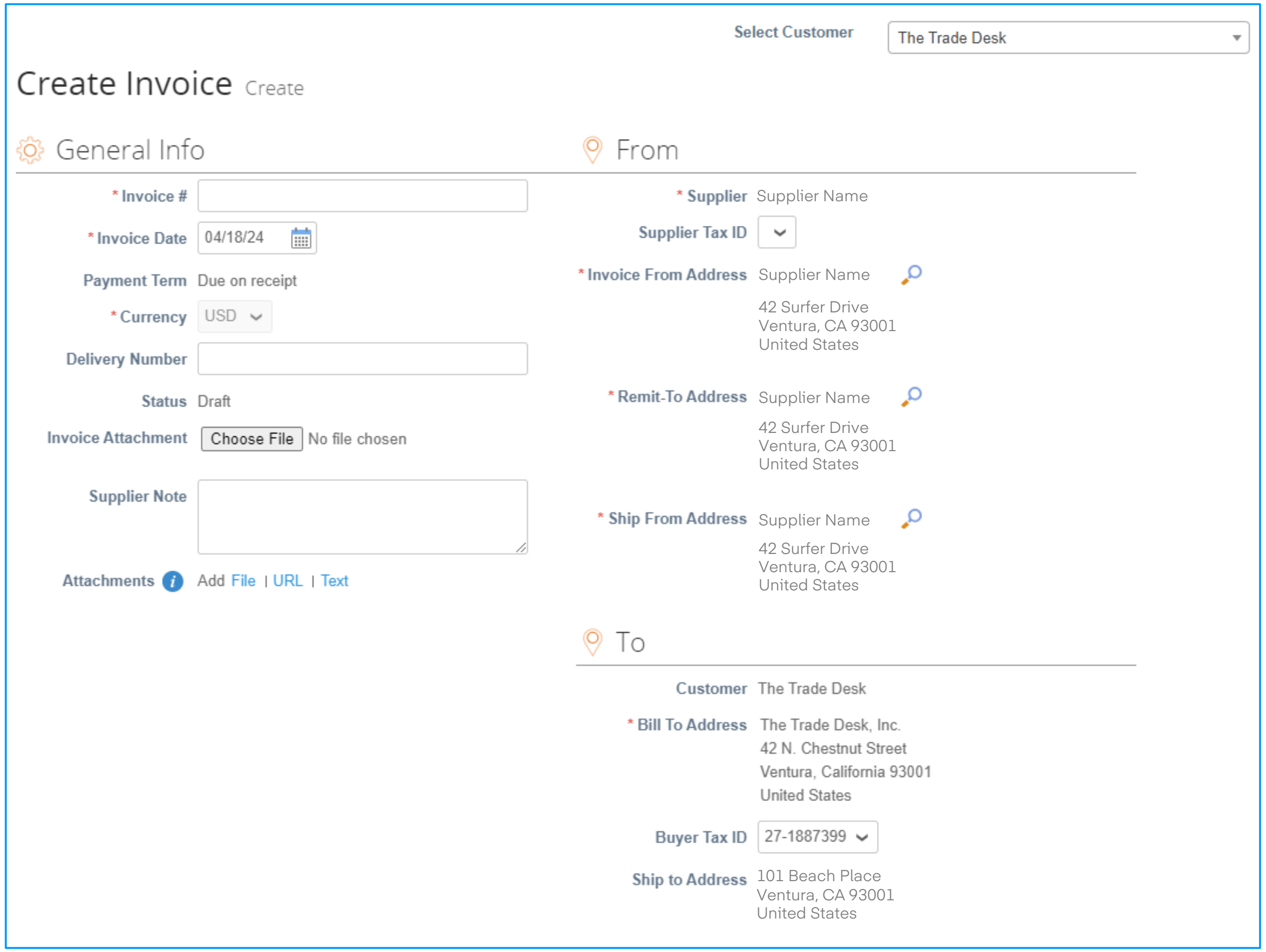
Create an Invoice in CSP



Once you select the correct Remit-To/Legal Entity, for your new invoice, the Remit-To and Ship From Address will populate automatically. If populated correctly, click **Save**.

Once the invoicing details have been selected and saved, Coupa will prompt you to **Create Invoice.**

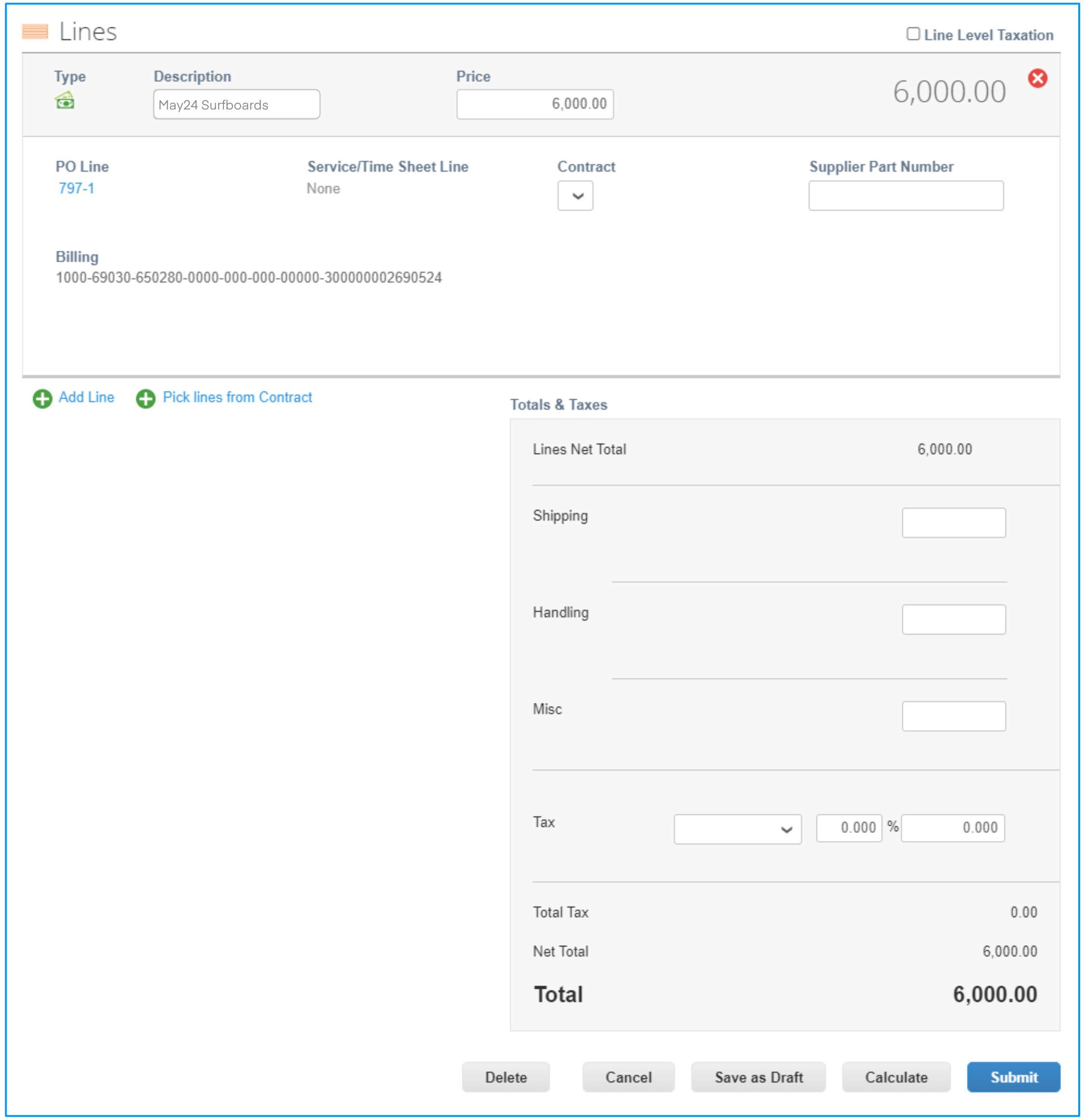
Create an Invoice in CSP



Populate all the required information when creating your invoice, noting these important items:

- Suppliers must generate their own **unique invoice number.** Duplicate Invoice number's will be rejected and delay payment.
- The **invoice date** populates to today's date but can be updated to align with when goods were shipped, or when services were delivered.
- **Currency** should align to the currency of the PO. If the currency selected does not match your agreement, please contact The Trade Desk Accounts Payable team.
- You will have the option to add **Attachments** which should only be utilized for additional support documents, not a copy of the Coupa generated or supplier generated invoice.

Create an Invoice in CSP



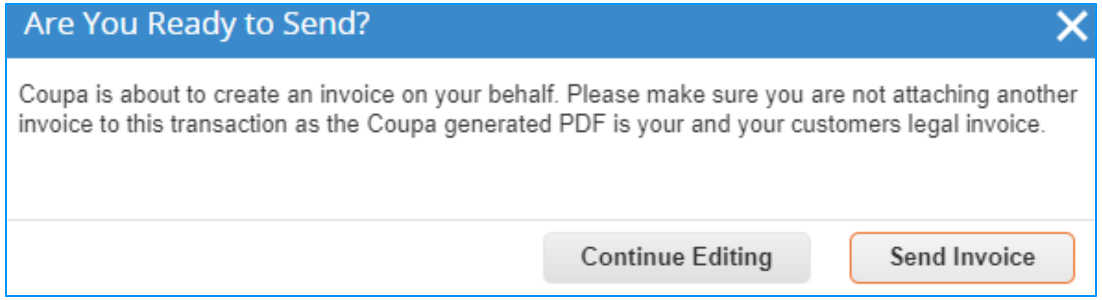
Continuing, scrolling down the page, locate the line level of the invoice and fill in the information.

If you need to delete a purchase order line or are invoicing against a purchase order with multiple lines, click on the icon next to the line you are not using.

Delete any unused lines you are not invoicing against within the purchase order.

Once all the information is accurately entered, review your invoice and click **Submit**.

Create an Invoice in CSP

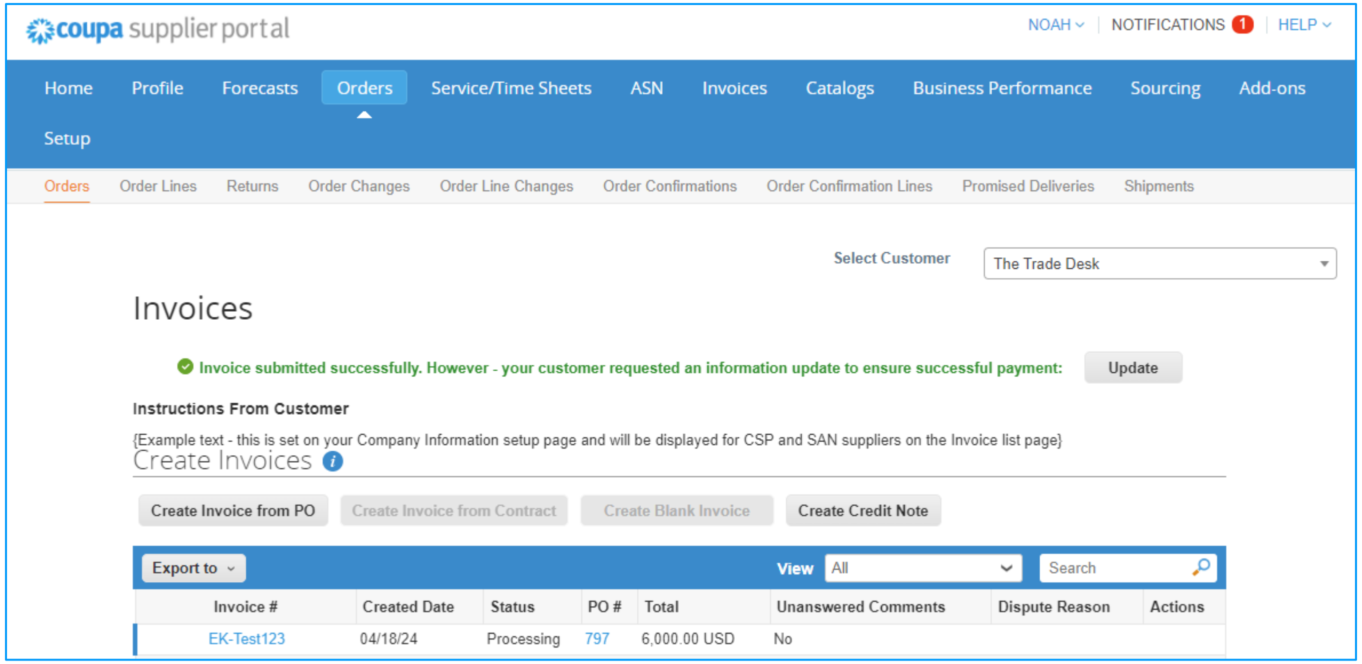


After selecting Submit, you will be prompted by Coupa to confirm creation of an invoice. Please respond accordingly.

Selecting **Continue Editing** will allow you to go back to the invoice and make changes.

Select **Send Invoice** to submit your invoice to The Trade Desk for review and processing.

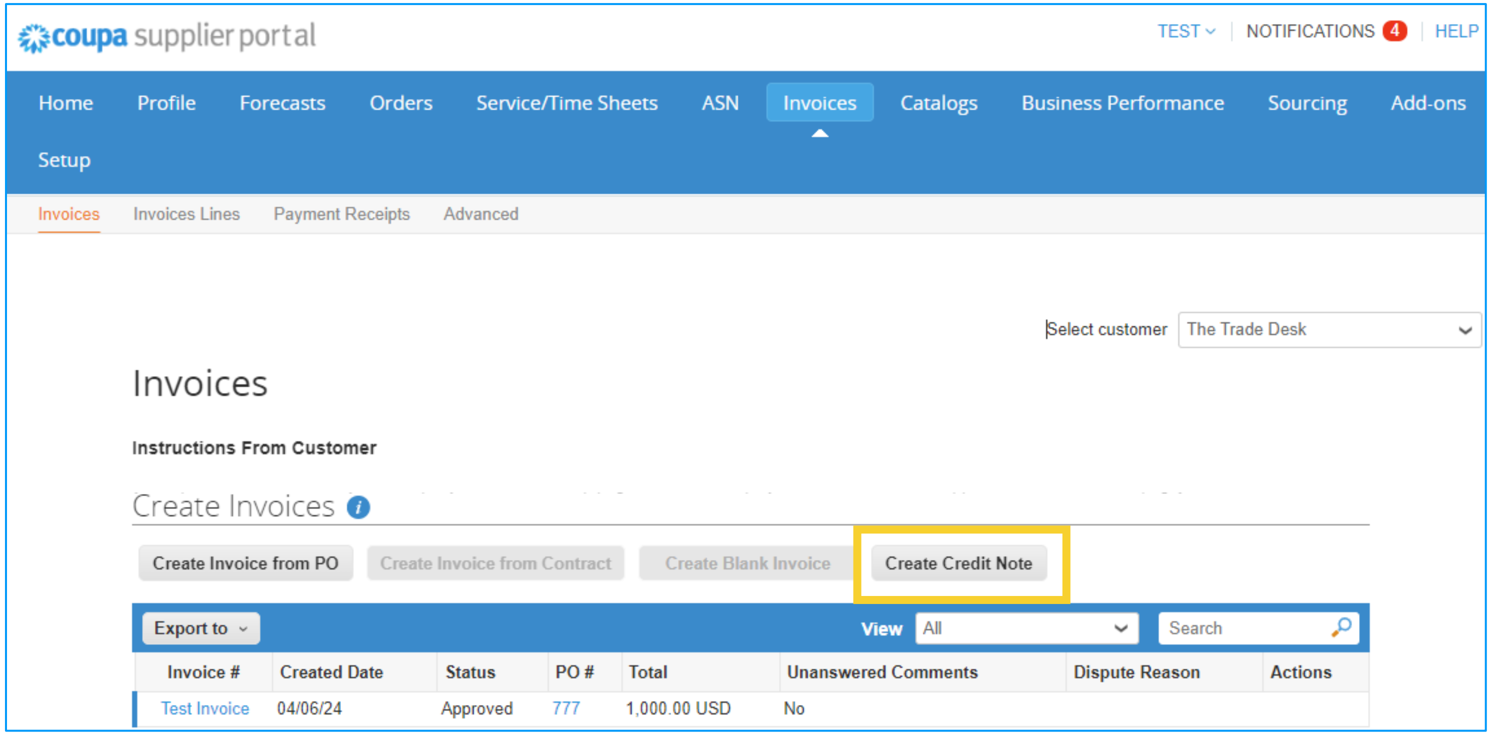
Create an Invoice in CSP



Once you have selected Send Invoice, you will see a message in green notating a successful submission. On this page you will find statuses of invoices submitted.

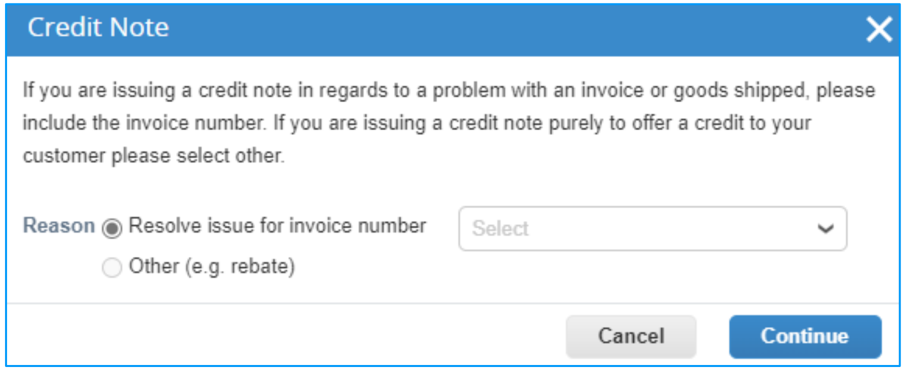
If you receive a red message, you have not submitted your invoice and will need to take action to re-submit.

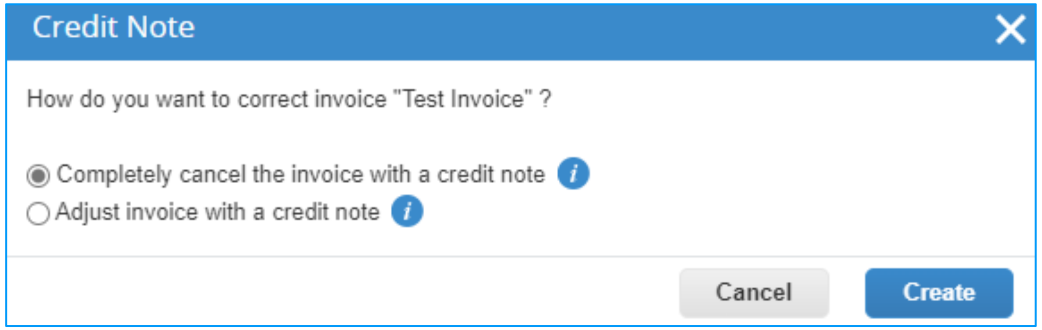
Create a Credit Note in CSP



When creating a credit note, navigate to the Invoices tab. Under your options panel you can click **Create Credit Note**.

Create a Credit Note in CSP

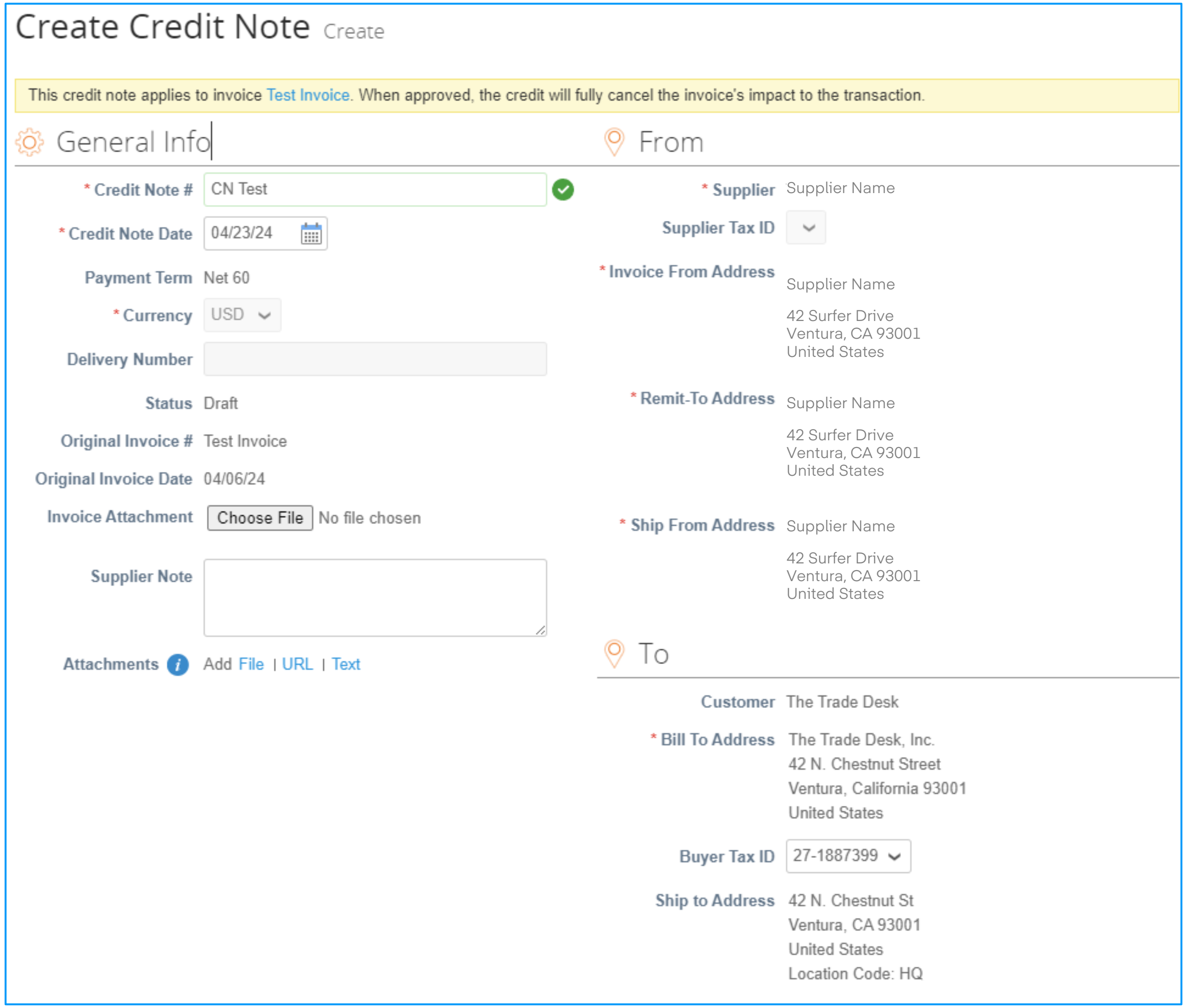




Coupa will prompt you to select **Resolve issue for invoice number** (a dropdown of applicable invoices are available for you to choose from) or **Other**.

If you have selected the invoice to apply to the credit note, you will need to select if the credit memo is to completely cancel or to adjust the invoice.

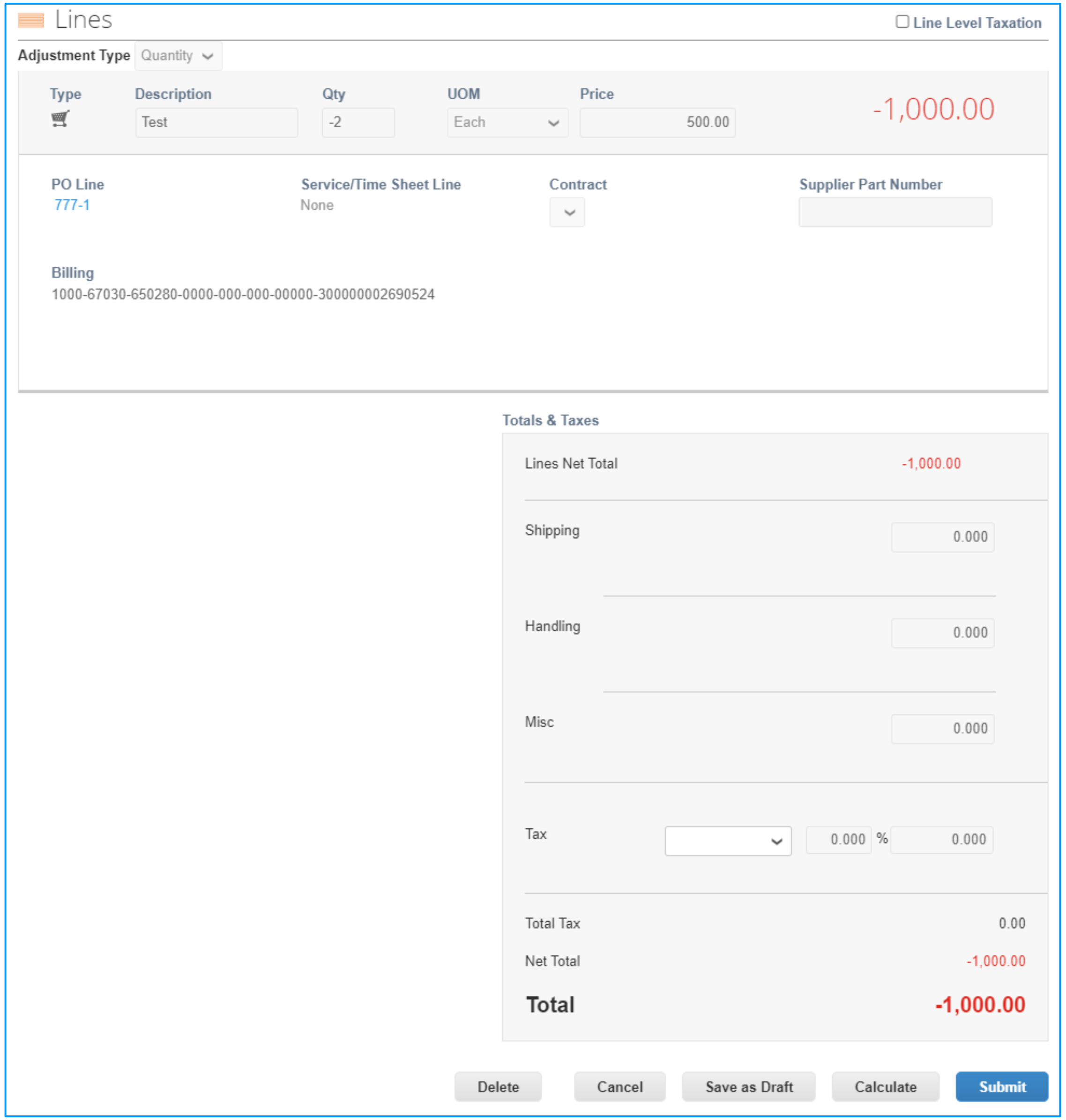
Create a Credit Note in CSP



You will then be prompted to enter Credit note number, which must be unique and differ from the invoice number.

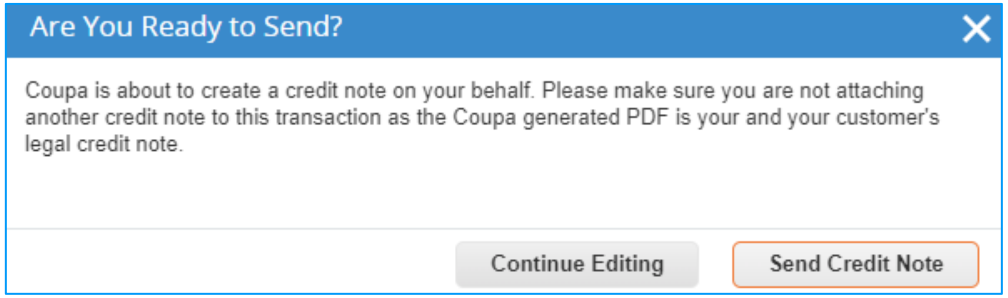
Under attachments, you will have the option to attach a PDF credit note.

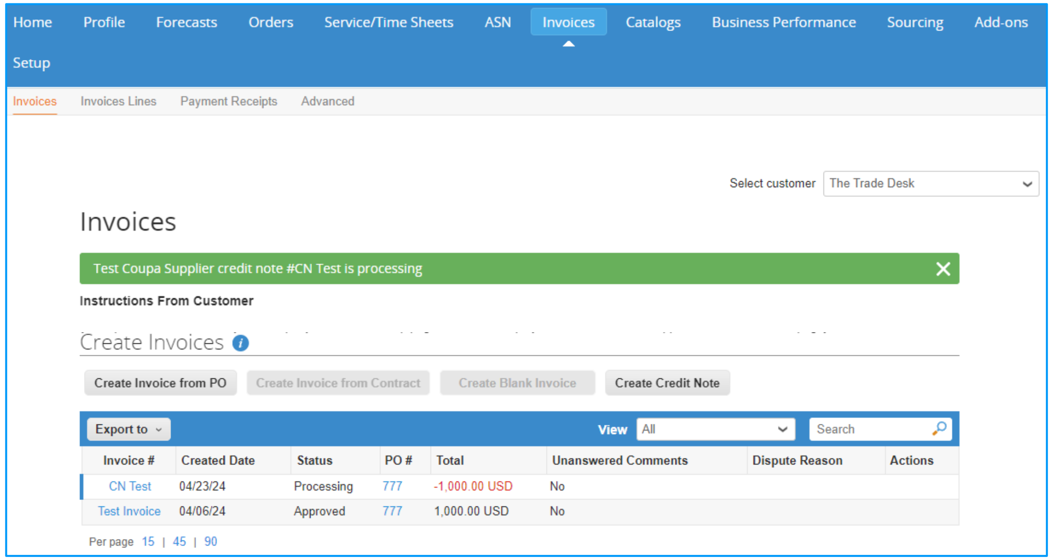
Create a Credit Note in CSP



Review the information and **Submit.**

Create a Credit Note in CSP





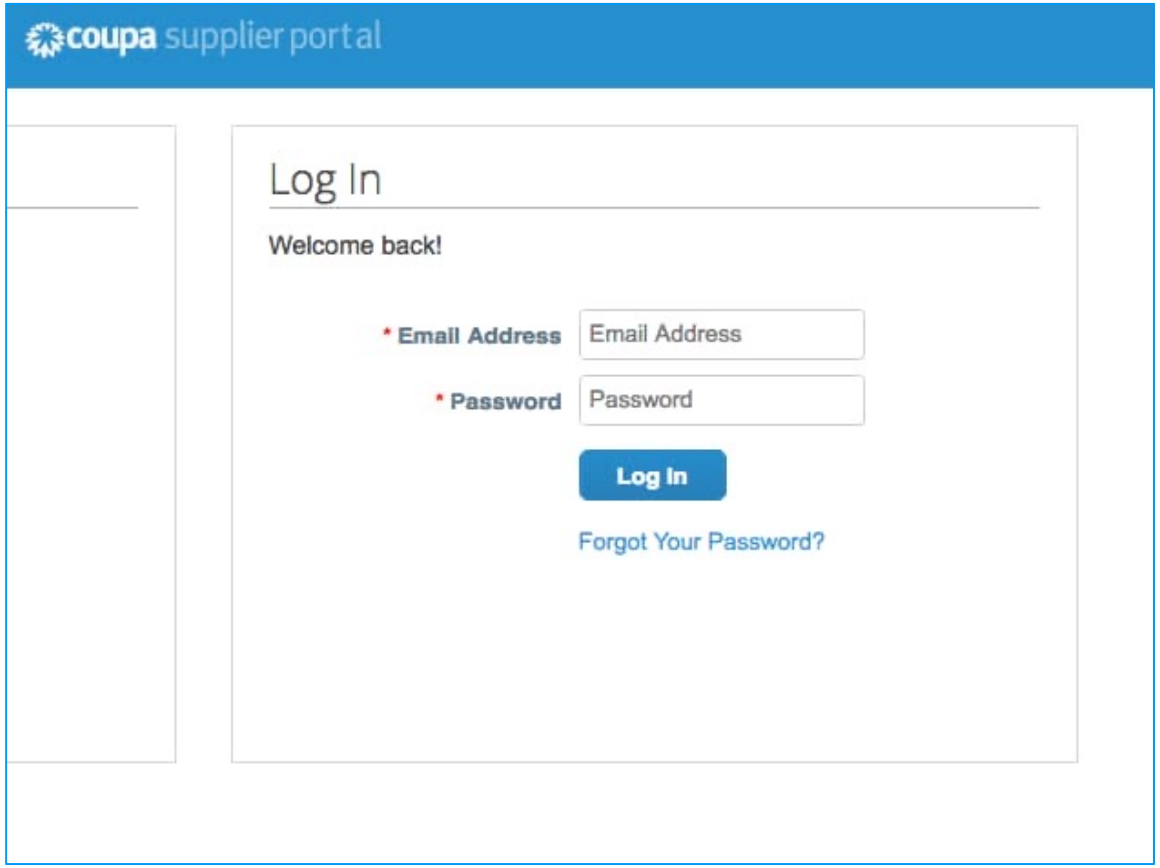
Similar to invoicing, you will be prompted by Coupa to confirm creation of a credit note. Please respond accordingly.

Once you have submitted, a green banner will appear informing you of a successful submission.

12 Coupa Supplier Portal (CSP) Overview

theTradeDesk

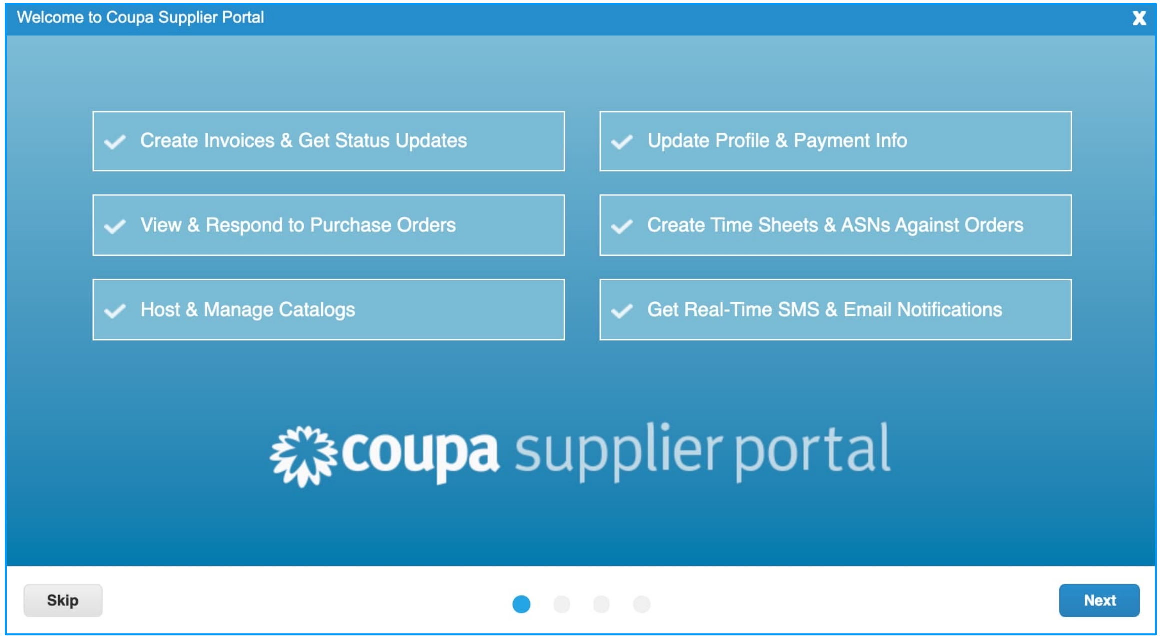
Logging In



Enter the Email Address and Password that was created when you first registered. Click Log In to access the Coupa Supplier Portal.

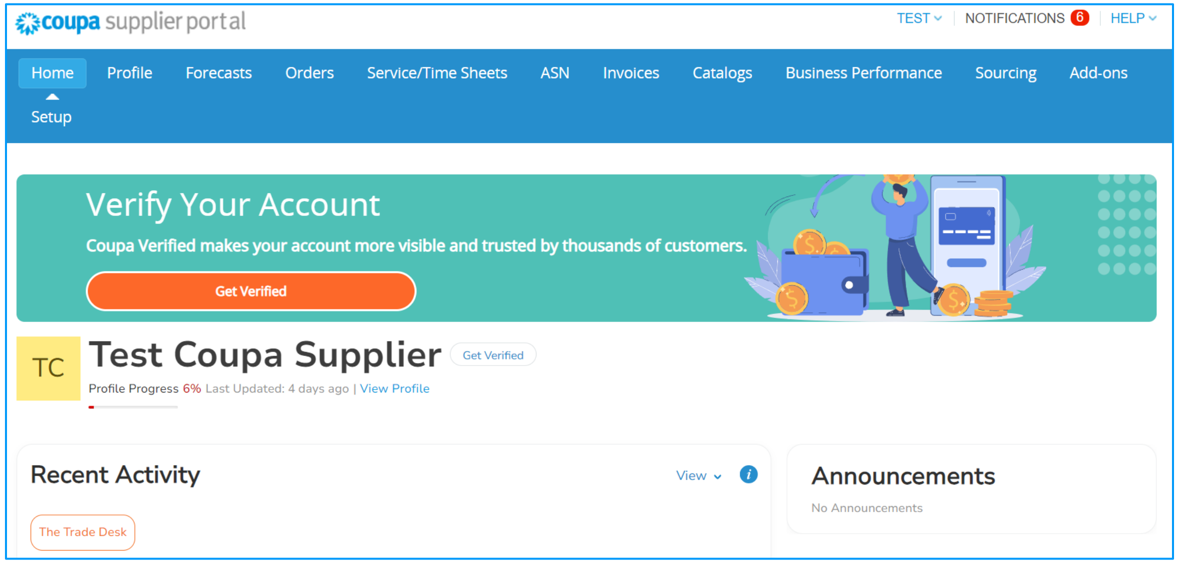
*If you forgot your password, click on "Forgot Your Password?" and Coupa will send an autogenerated email to you. If you did not receive the email, check your Spam/Junk Folder.

Coupa Supplier Portal Tour



Coupa has created a welcome tour for all new users. The Trade Desk recommends to take the tour once, after signing up.

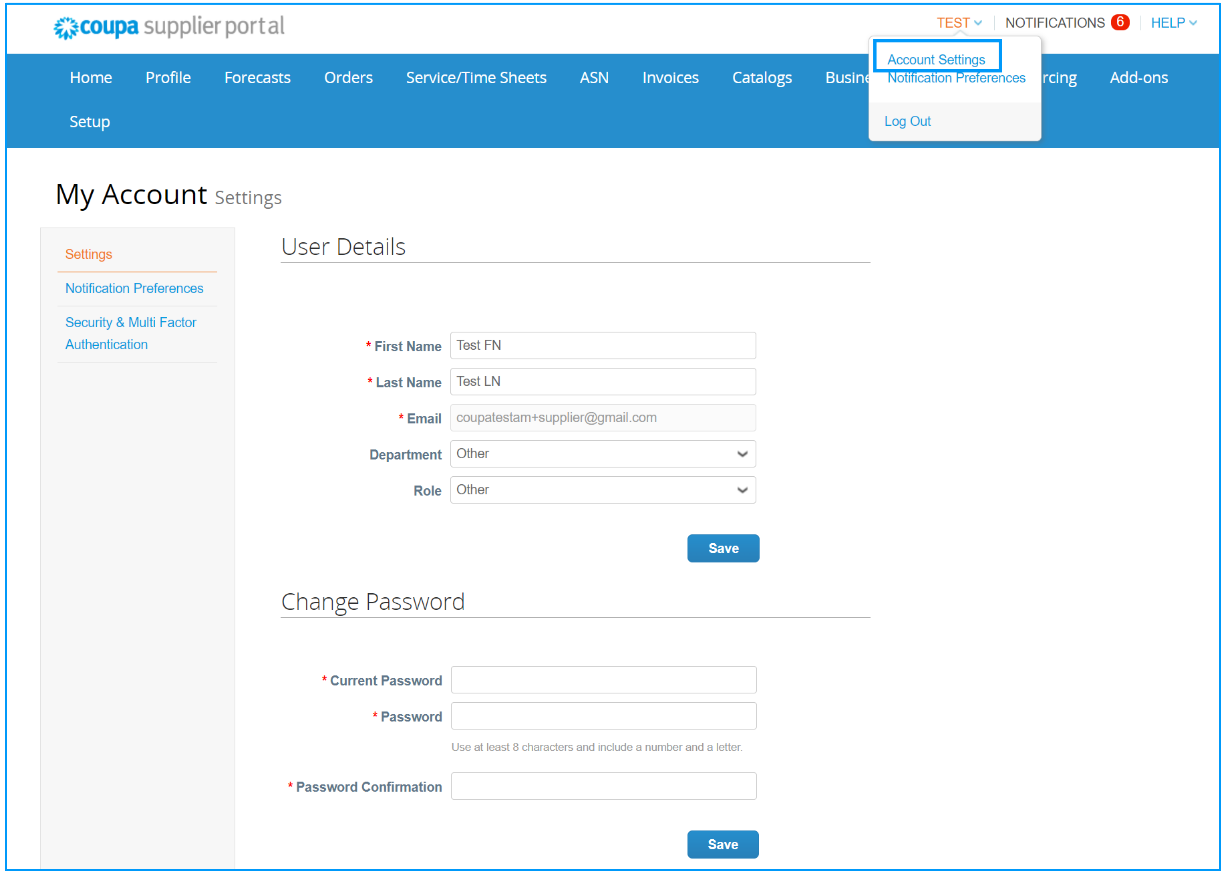
Coupa Homepage



The main tabs you will be using for The Trade Desk are: Profile, Orders, Invoices, and Admin

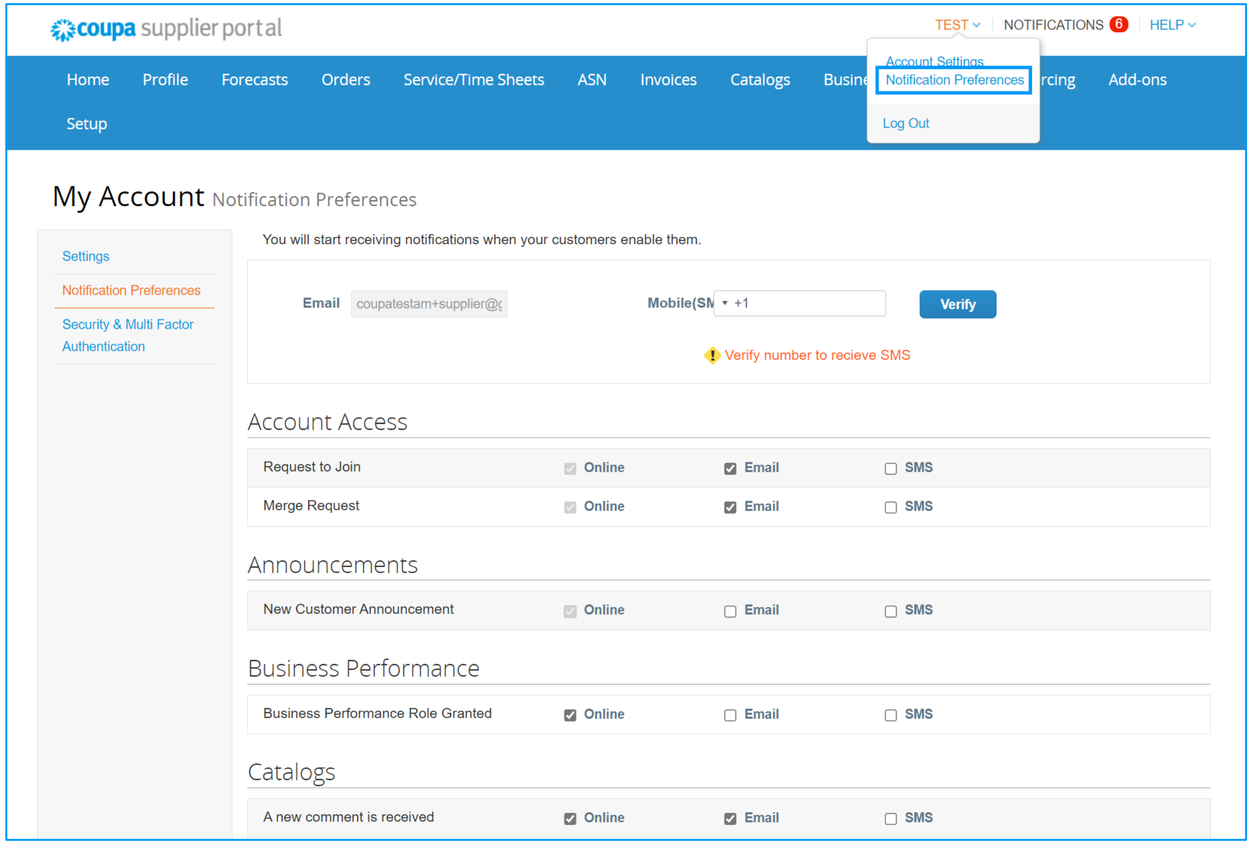
Additional features would be Account Settings, Notifications, Invite Users, and Merge Accounts. Account settings can be access by going to the top right corner and hovering or clicking on your name.

Account Settings



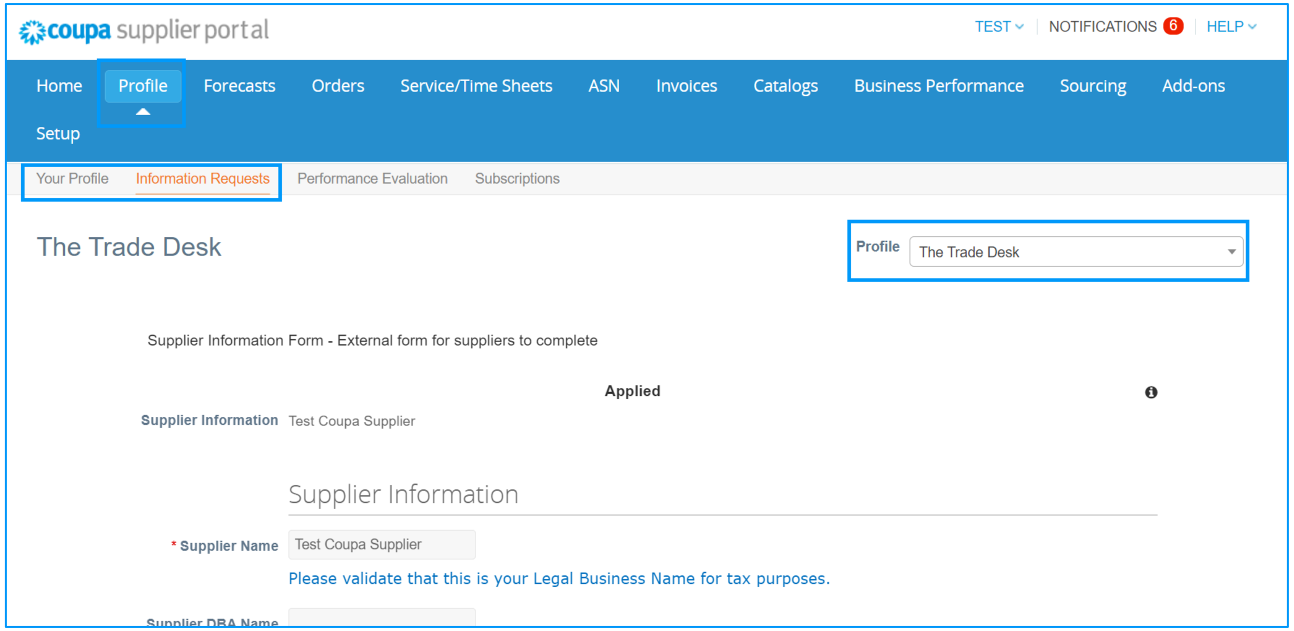
The Account Setting page allows you to change your First and Last Name, your department, your role, and your password.

Notifications and Settings



Notifications is like an Email inbox. You can set your notification preferences by clicking the "Notification Preferences" on the top right corner. Once you adjust, scroll to the bottom and click Save.

Profile



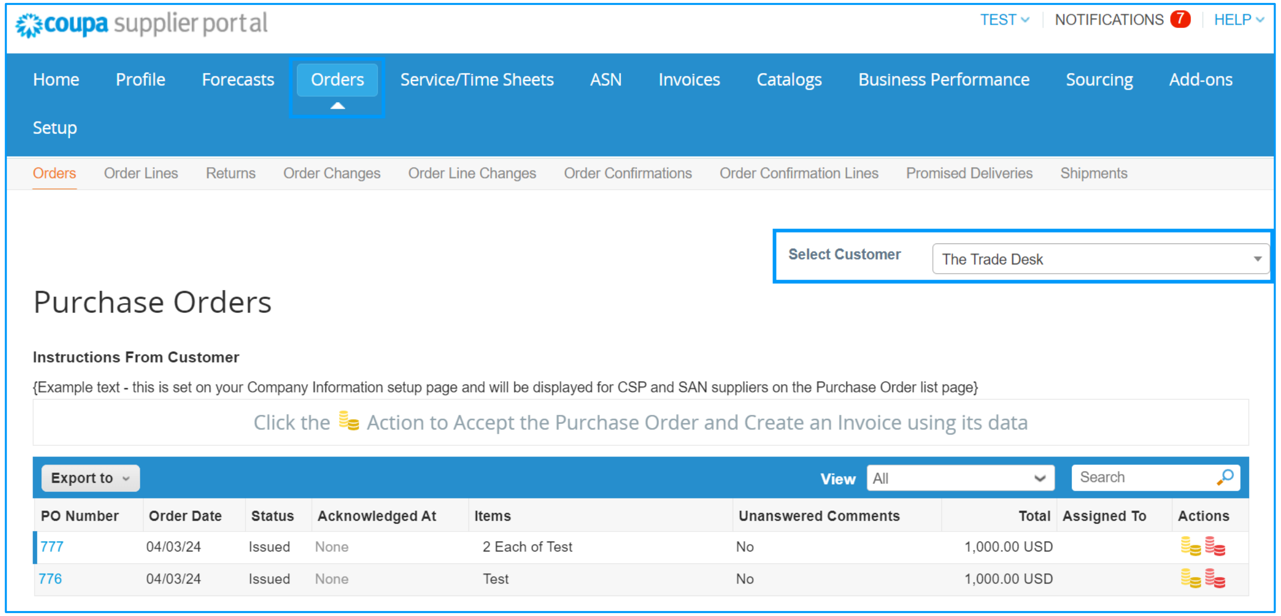
Your Profile will not update or send information to The Trade Desk.

If you need to update your company's information for The Trade Desk, you will need to contact The Trade Desk and they will send you a Supplier Update Form.

Once invited to edit supplier information, go to the Information Requests tab. Update non-greyed-out fields without deleting existing remit addresses; only add new remit addresses with updated details.

If you have completed updating your information, you must Submit for Approval.

Purchase Orders



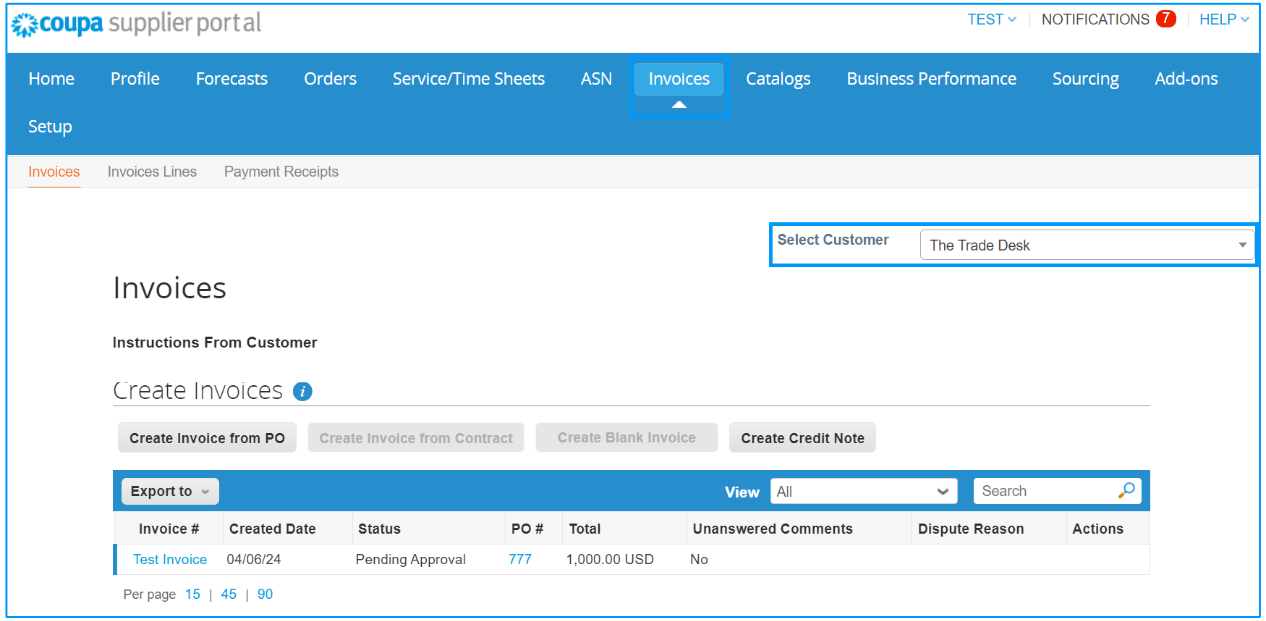
This is where you can find The Trade Desk Purchase Orders.

You will be able to view your Purchase Order details.

Under the Actions column, you will be able to click an invoice by clicking on the gold stack of coins on the PO line. You can also click the PO number to create an invoice.

If you do not see any purchase orders, and are expecting to, please reach out to your The Trade Desk contact.

Invoices

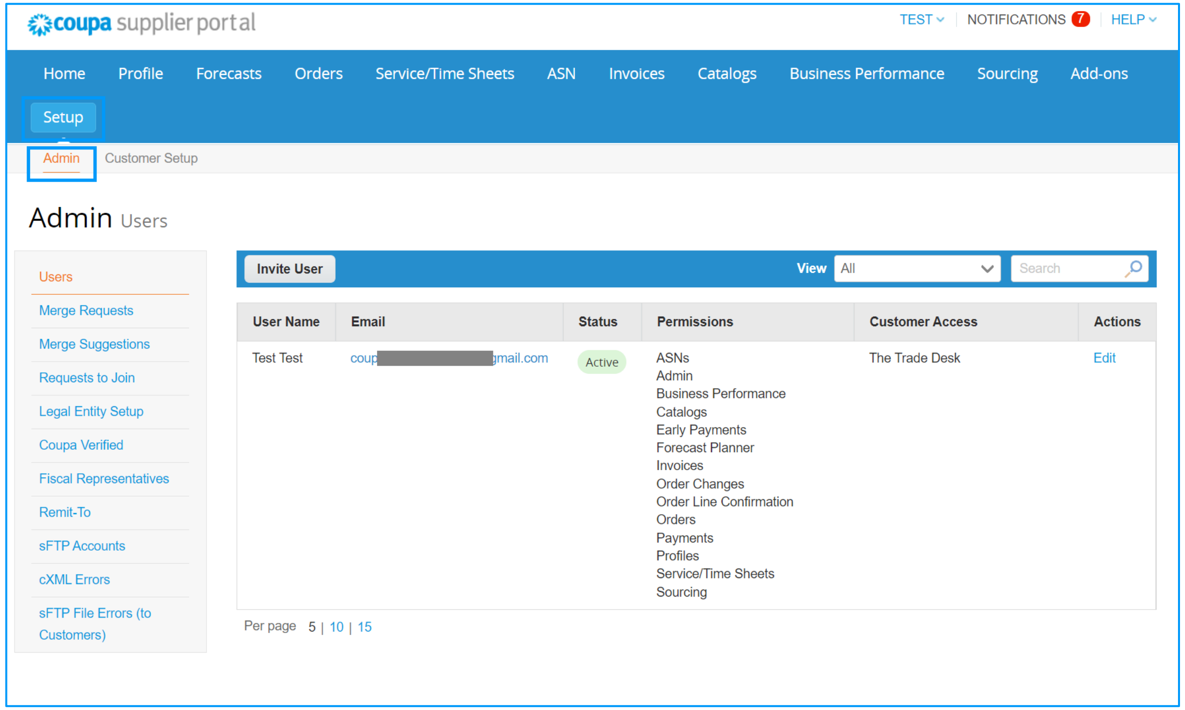


This invoices page is where you can find invoices and credit memos for The Trade Desk.

You can also create a view of your own so you may sort or search more easily.

NOTE: You will not be able to edit an invoice after it has been submitted. If there is an issue with your invoice, you will need to reach out to The Trade Desk.

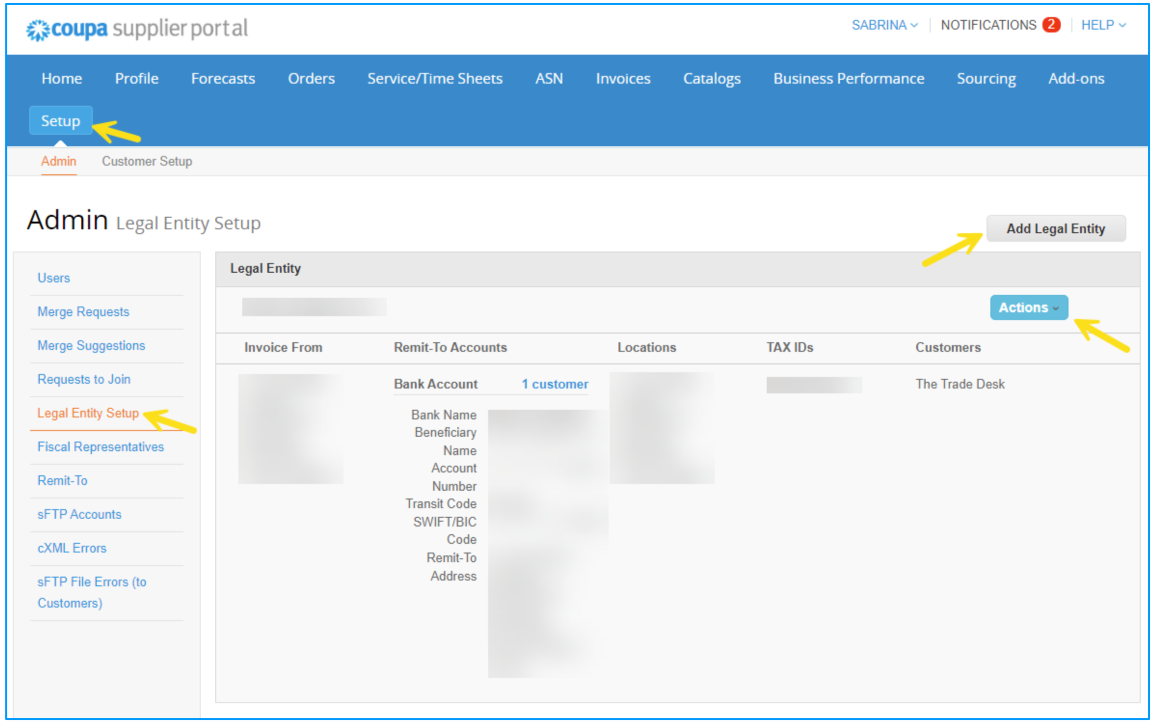
Setup, Admin, Invite Users



Within the Setup and Admin tab you will be able to add users, merge your other Coupa accounts, view your remit-to information, and complete your e-invoicing setup, as well as many more features.

To invite users, click **Invite User**, enter the user's information, and select the permissions and customer you wish to give them access to. Click **Send Invitation** and the user will receive an email from Coupa prompting them to accept and create a Password.

Add a Legal Entity



In this section, you will be able to view all the Legal Entities created. You will be able to deactivate the entities by clicking “Action” or adding new Legal Entities by clicking “Add Legal Entity”.

13 Additional Resources

ADDITIONAL RESOURCES

Next Steps

We invite you to visit our Supplier Resources webpage, where you'll discover resources designed to assist you, located within the sections for **Terms & Conditions** and **Help** pages.

We're committed to supporting you as you engage with us, and these resources are here to ensure your experience is smooth and productive.

Thank you for choosing to partner with The Trade Desk, and we look forward to our continued collaboration together!

Contact Resources

For Coupa Supplier Resources and Support visit:

Coupa Supplier Support Website - Coupa Compass

For questions on New Supplier Onboarding, Supplier Information Changes, Invoices, or Payment related inquires, please contact:

The Trade Desk Accounts Payable Team:

United States - ap@thetradedesk.com

Outside the United States - ap.uk@thetradedesk.com

For other questions about Coupa and support from TTD, please contact:

The Trade Desk Purchasing Team:

Global - purchasing@thetradedesk.com

For Purchase Order assistance:

Please reach out to your buyer contact at The Trade Desk.