

 theTradeDesk<sup>®</sup>

# CURRENT SUPPLIER GUIDE



# Table of Contents

- 01 The Trade Desk & Benefits of Coupa Supplier Portal
- 02 Supplier Invitation Overview
- 03 Invitation to Join the Coupa Supplier Portal (CSP)
- 04 Connect your CSP Account with The Trade Desk
- 05 Invitation to Update your Supplier Information
- 06 Supplier Information Update Form Guide
- 07 Purchase Order Guide
- 08 Supplier Actionable Notice (SAN)
- 09 Advance Ship Notice (ASN)
- 10 Invoicing Overview
- 11 Invoice and Credit Memo Processing through CSP
- 12 Coupa Supplier Portal-Quick Reference Guide
- 13 Additional Resources

# 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?

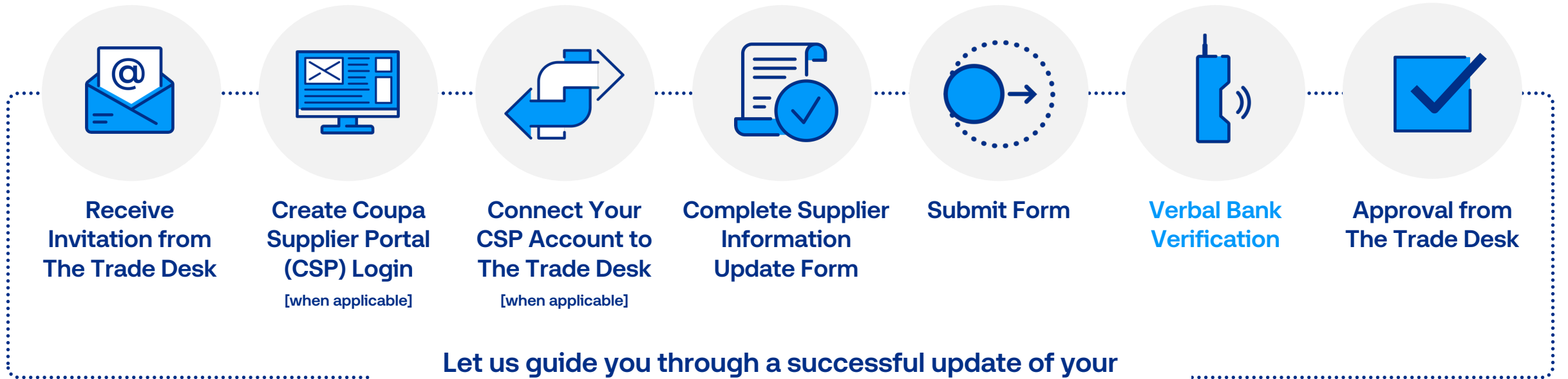
- Securely update Contact Information, Company Address, Remittance, Banking and Tax Information.
- PO Email – Coupa will automatically send the Purchase Order to the PO email listed in the system once approved.

## 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



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

# 02 Supplier Invitation Overview

# 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)



# The Trade Desk Invitation – Coupa Supplier Portal (CSP)

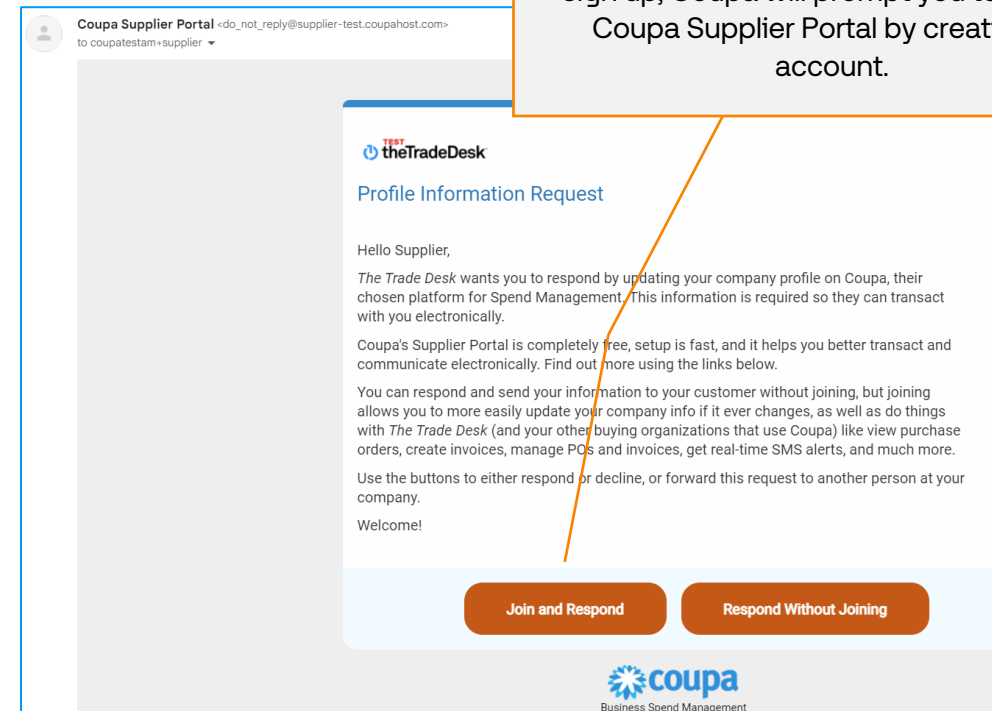
If you **are not** a current user of Coupa Supplier Portal and need to provide updated account information to The Trade Desk, follow this instruction.

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.

The screenshot shows the 'Create an Account' page in the Coupa Supplier Portal. The page title is 'coupa supplier portal' and it is marked as 'Secure'. The main heading is 'Create an Account'. Below the heading, there is a paragraph: 'The Trade Desk is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with The Trade Desk so you're ready to do business together.'

The form contains the following fields:

- Business Name:** Test Coupa Supplier (prepopulated)
- Email:** coupatestam+supplier@gmail.com (prepopulated)
- First Name:** Test
- Last Name:** Test
- Password:** (empty)
- Confirm Password:** (empty)

Below the form, there is a checkbox for 'I accept the Privacy Policy and the Terms of Use' and a blue 'Create an Account' button. At the bottom, there is a link for 'Forward this to someone' and a link for 'LOG IN'.

Callout boxes point to the following elements:

- '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.

# 04 Connect your CSP Account with The Trade Desk

CONNECT YOUR CSP ACCOUNT WITH 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**.




The Trade Desk  
Supplier Database

Coupa Supplier  
Portal (CSP)




 theTradeDesk

# Connect your CSP - Invitation



You are Connected to The Trade Desk on Coupa

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Powered by 

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](#)

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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 

 **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 you 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.

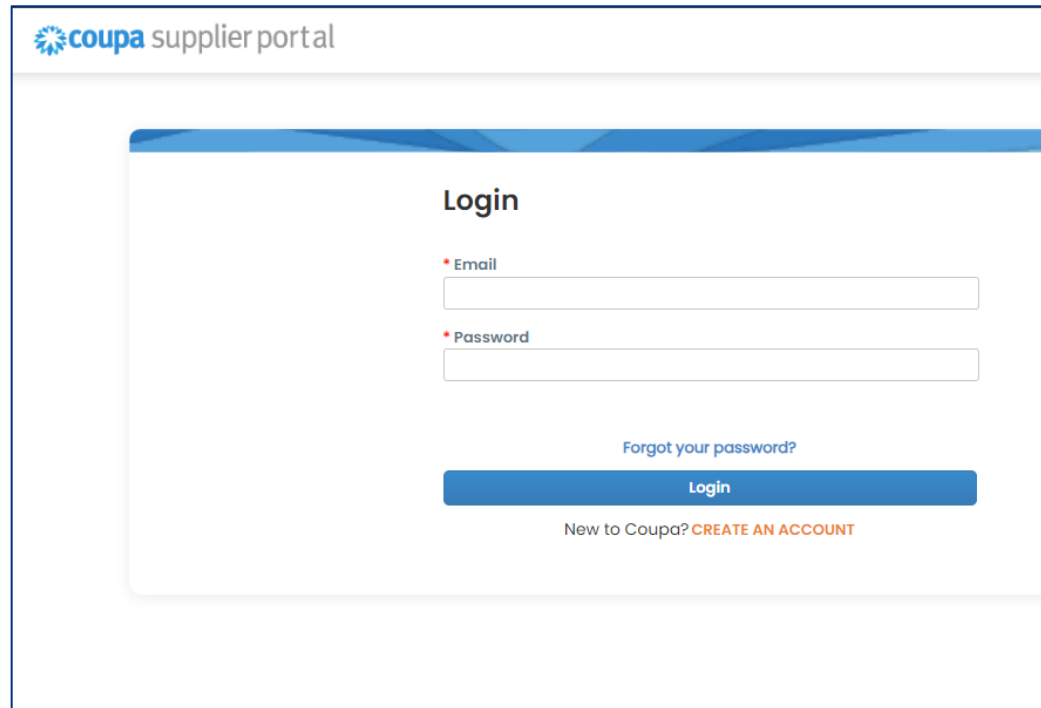
Items to keep in mind when updating your information include:

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



The screenshot shows the Coupa supplier portal login interface. At the top left, the Coupa logo and 'supplier portal' text are visible. The main content area is titled 'Login' and contains two input fields: 'Email' and 'Password', both marked with a red asterisk. Below the password field is a link for 'Forgot your password?'. A blue 'Login' button is positioned below the links. At the bottom, there is a link for 'New to Coupa? CREATE AN ACCOUNT'.

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

The screenshot displays the Coupa Supplier Portal interface. At the top, the navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Profile' tab is highlighted with a yellow box. Below this, the 'Setup' section contains 'Your Profile', 'Information Requests', 'Performance Evaluation', and 'Subscriptions'. The 'Information Requests' subtab is also highlighted with a yellow box. The main content area is titled 'The Trade Desk' and features a dropdown menu for 'Profile' set to 'The Trade Desk'. Below this, there is a section for 'Supplier Information Form - External form for suppliers to complete'. The form includes fields for 'Supplier Name', 'Supplier DBA Name', 'Website', 'Organization Type', 'Business Units', and 'Goods and Services Provided'. A note below the 'Supplier Name' field states: 'Please validate that this is your Legal Business Name for tax purposes.' The 'Applied' status is shown as 'Applied' with a small 'e' icon.

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

The Trade Desk Internal Information

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

Site Name

Business Unit

Payment Currency

Payment Terms

Pay Group

Allow International Payments

Do you have any questions, comments, or concerns for The Trade Desk?

**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

• 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: Los Angeles

Street Address: 759 Figueroa St

Street Address 2:

City: Los Angeles

Postal / Zip / Pin Code: 90012

Put N/A if not applicable.

Region

Country/Region: United States

State Region: California - CA

State ISO Code: US-CA

Remit To Contact Email: Ek.cot

Payment remittance email

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

Choose Remit-To Address

Choose a Remit-to Location below - Recommended  
*It's a few more fields, but provides compliance, verification, and re-usability. Otherwise, click 'Cancel' to add info to your customer's form manually.*

Choose existing or create new Remit-To Address:

759 Figueroa St  
Los Angeles, CA 90012  
United States

759 Figueroa St  
Los Angeles, CA 90012

Bank Account (Bank of America)

+ Create New Remit-To Address

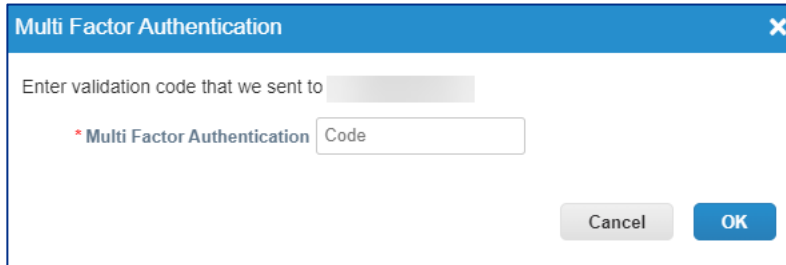
Cancel

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.

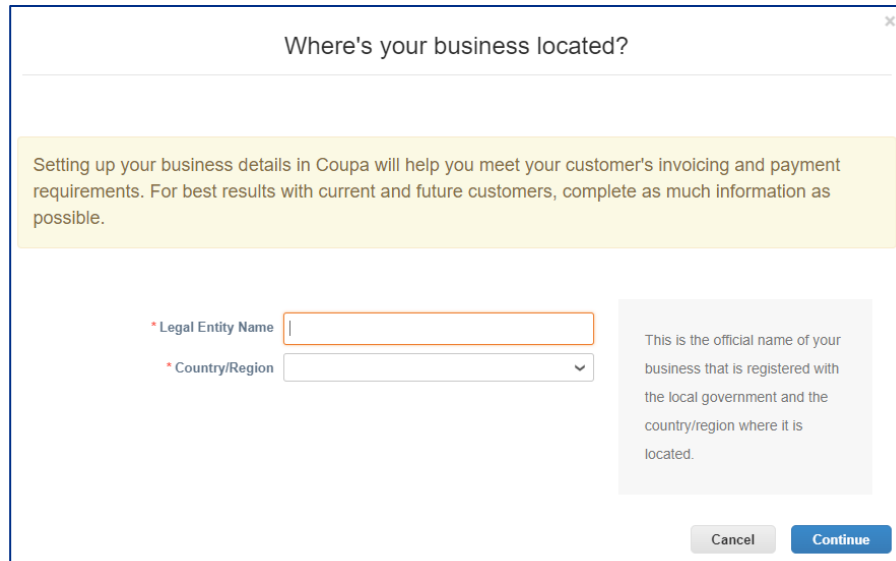
If you do not see the remittance address, select **Create New Remit-To Address**. Follow the prompts to create and add your updated information.

# Supplier Information Update Form – Add Remit-To



A dialog box titled "Multi Factor Authentication" with a close button (X) in the top right corner. The text inside says "Enter validation code that we sent to [redacted]". Below this is a label "\* Multi Factor Authentication" followed by a text input field containing the word "Code". At the bottom right are two buttons: "Cancel" and "OK".

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.



A dialog box titled "Where's your business located?" with a close button (X) in the top right corner. Below the title is a yellow informational box with the text: "Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible." Below this are two required fields: "\* Legal Entity Name" with a text input field, and "\* Country/Region" with a dropdown menu. To the right of these fields is a grey box containing the text: "This is the official name of your business that is registered with the local government and the country/region where it is located." At the bottom are two buttons: "Cancel" and "Continue".

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

# Supplier Information Update Form – Add Remit-To

Tell your customers about your organization

Which customers do you want to see this?

All  
 The Trade Desk

What address do you invoice from?

Use an existing address Select

\* Address Line 1

\* City

State Select an Option

\* Postal Code

Country/Region United States

Use this address for Remit-To i  
 Use this for Ship From address i

What is your Tax ID? i

Country/Region United States x

Tax ID

I don't have Tax ID Number

[Add additional Tax ID](#)

Miscellaneous

Invoice From Code  i

Preferred Language English (US)

Cancel Save & Continue

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?

1 2 3 4

\* Payment Type Virtual Card

Virtual Card information

\* Email Address

What is your Remit-To Address?

Address Line 1 357 Marion Lane  
City Los Angeles  
State CA  
Postal Code 90001  
Country/Region United States

Cancel Save & Continue

**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

The screenshot shows a form titled "Where do you want to receive payment?". At the top, there are four numbered steps: 1, 2, 3 (highlighted in orange), and 4. Below the steps, there is a text instruction: "Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next." To the right of this text is an "Add Remit-To" button. Below the instruction is a table with three columns: "Remit-To Account", "Remit-To Address", and "Status". The first row contains "Virtual Card" in the first column, a blurred area in the second column, and "Active" in the third column. To the right of the "Active" status is a "Manage" button. At the bottom of the form, there are three buttons: "Deactivate Legal Entity" (red), "Cancel" (grey), and "Next" (blue).

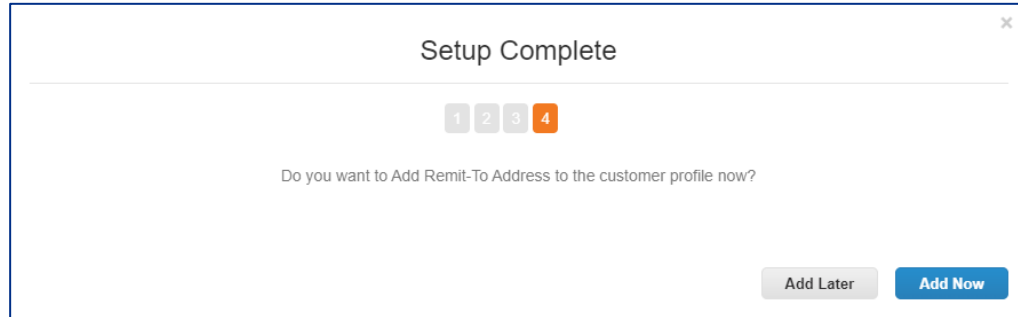
Remit-To Account	Remit-To Address	Status
Virtual Card	[Blurred]	Active

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

1 2 3 4

Do you want to Add Remit-To Address to the customer profile now?

Add Later Add Now

**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.

\* Remit-To Address

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

State Region

State ISO Code

\* 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

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  x v

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

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.

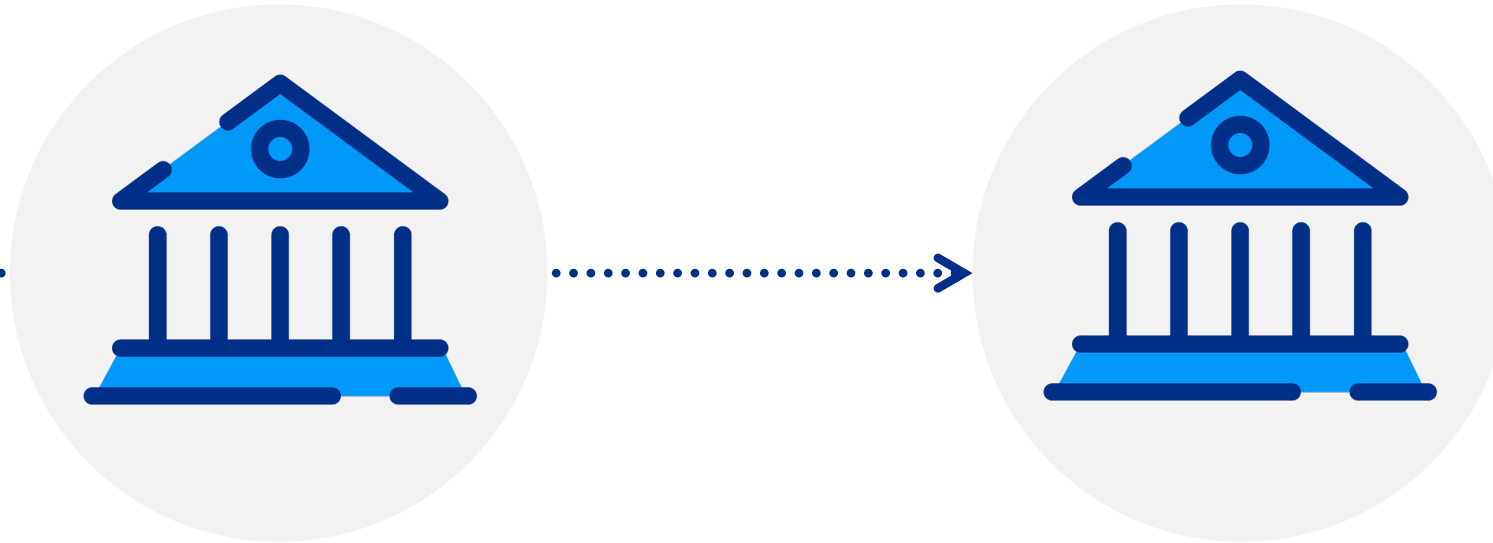
- Please be advised a valid verbal verification is REQUIRED for all new bank accounts and bank account changes.

**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

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.

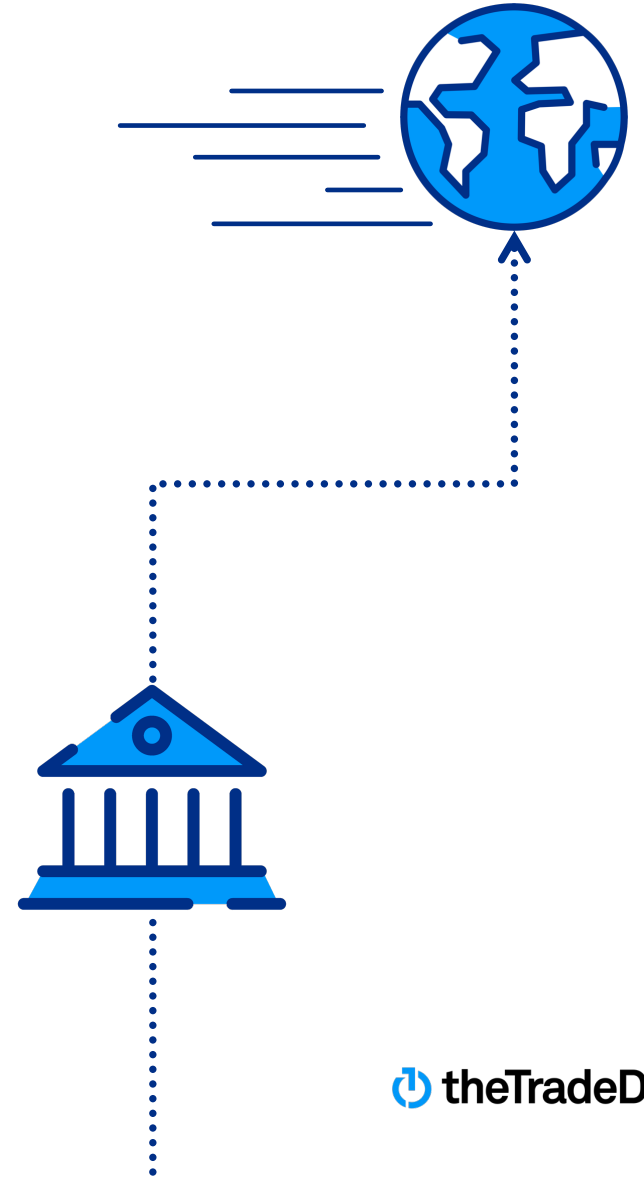
Suppliers utilizing **Australia Banks**, please add your BSB Number.

**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

\* Bank Account Location  US Based Bank Account  Non US Based Bank Account

Vendor Bank Information

\* Beneficiary Name

\* Bank Name

Bank Account Number  ⓘ

\* Bank Account Currency

Bank Routing Number  ⓘ

Bank Wire Routing Number  ⓘ

SWIFT Code (BIC)  ⓘ

Bank Address

Bank City

Bank State or Region

Bank Postal Code/ Pin Code

\* Bank Country/Region

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

Payment Currency

Payment Terms

Pay Group

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

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders' (highlighted with an orange box), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this is a 'Setup' section with a sub-menu where 'Orders' is also highlighted. A 'Select Customer' dropdown menu is set to 'The Trade Desk'. The main content area is titled 'Purchase Orders' and includes 'Instructions From Customer' with a text box containing: 'Click the Action to Accept the Purchase Order and Create an Invoice using its data'. Below this is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains two rows of data.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
777	04/03/24	Issued	None	2 Each of Test	No	1,000.00 USD		
776	04/03/24	Issued	None	Test	No	1,000.00 USD		

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)


# 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

Purchase Orders

**Instructions From Customer**  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the  Action to Invoice from a Purchase Order

Export to	View	All	Search					
PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
PO000020	03/17/22	Issued	None	200 Hours of Consultant	No	20,000.00 USD		  
PO000019	03/17/22	Issued	None	contract backed free form request	No	30,000.00 USD		  

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

# Manage Purchase Orders in CSP

Purchase Order # PO000017

General Info	Shipping
<b>Status:</b> Issued - Sent via Email	<b>Ship-To Address:</b> 150 Forest Ave Palo Alto, CA 94301 United States Attn: Requester Test
<b>Order Date:</b> 03/17/22	<b>Terms:</b> None
<b>Revision Date:</b> 03/17/22	<b>Shipment Tracking:</b> No shipment tracking. <span style="color: green;">+ Add</span>
<b>Requester:</b> Requester Test <b>Email:</b> ccc.coupa.supplier+requester@gmail.com	
<b>Payment Term:</b> Net 30	
<b>Attachments:</b> None	
<b>Acknowledged:</b> <input type="checkbox"/>	
<b>Assigned to:</b> <input type="text" value="Select"/>	

Create Shipment Tracker

Enter tracking number for entire PO. To ship PO partially, create ASN.

\* Tracking Number

\* Carrier

Note

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)

# Manage your Purchase Order

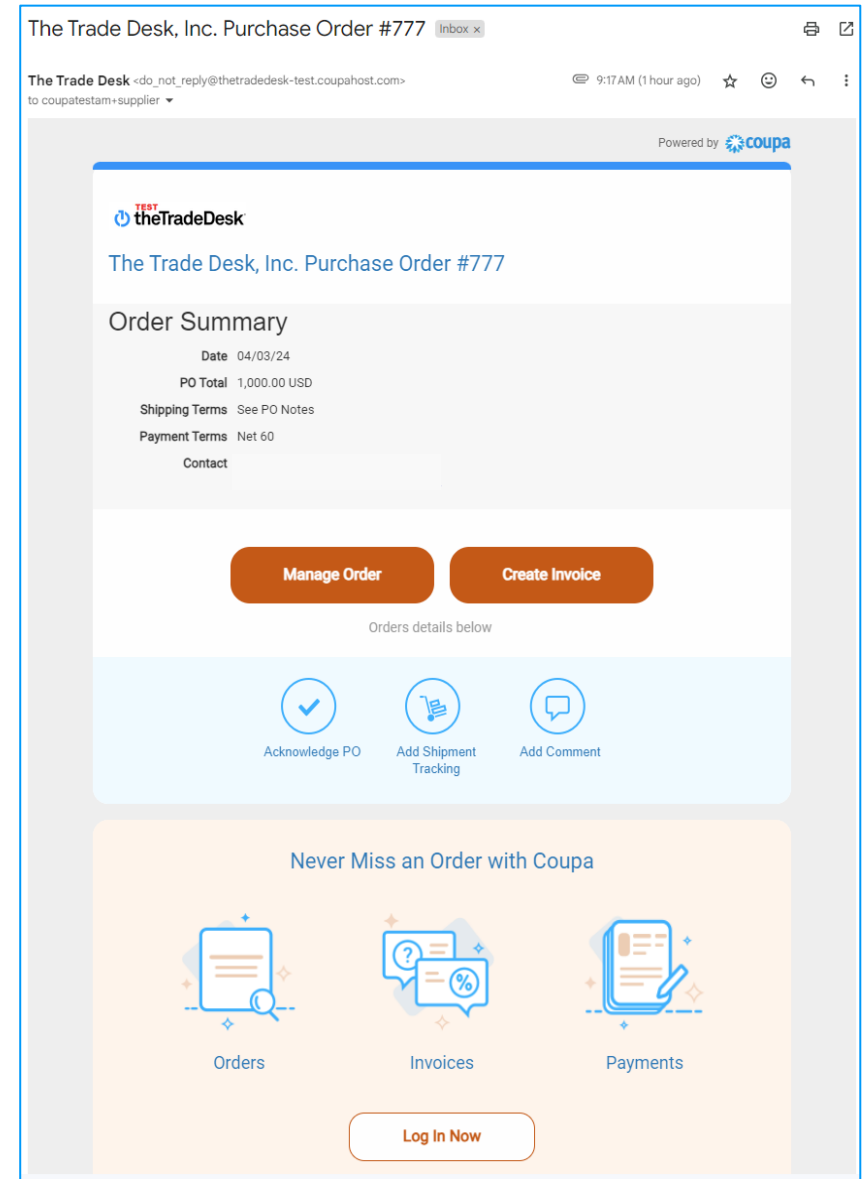
Supplier Actionable Notifications (SAN) allow you to interact with The Trade Desk without a [Coupa Supplier Portal \(CSP\)](#) account. You can acknowledge purchase orders, submit invoices, or add comments directly from Coupa's email notifications.

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.



# 09 Advance Ship Notice (ASN)

# Advance Ship Notice

Purchase Orders

Instructions From Customer  
(Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Invoice from a Purchase Order

Export to  View  All  Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
PO000020	03/17/22	Issued	None	200 Hours of Consultant	No	20,000.00 USD		

### Create Advance Ship Notice

**General Info**

\*ASN #

Status  Draft

Ship Date  mm/dd/yyyy

Delivery Date  mm/dd/yyyy

**Ship To**

Address 150 Forest Ave  
Palo Alto, CA 94301  
United States

**Shipping Info**

Tracking Number

Carrier

Shipping Method

Ship Note

**Lines**

Description	Quantity	UOM	Received Quantity	Status
Consultant	<input type="text"/> 200	Hours	0	Draft

Supplier Part Number: None  
PO #: HPO000020  
PO Line: 1  
Po Line Quantity: 200.0

Invoice Num Reference: Invoice  
Invoice Line: Invoice Line  
Invoice Line Qty: Invoice Line Qty

Comments

Cancel  Save  Submit

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

Create Advance Ship Notice

**General Info**

ASN #

Status Draft

Ship Date

Delivery Date

**Ship To**

Address 150 Forest Ave  
Palo Alto, CA 94301  
United States

**Shipping Info**

Tracking Number

Carrier

Shipping Method

Ship Note

**Lines**

Description	Quantity	UOM	Received Quantity	Status
Consultant	200	Hours	0	Draft

Supplier Part Number: None  
PO #: HPO000020  
PO Line: 1  
Po Line Quantity: 200.0

Invoice Num Reference: Invoice  
Invoice Line: Invoice Line Qty

Comments

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

Save for later or submit.

Advance Ship Notices

Export to View All Search

ASN Number	Status	Delivery Date	Last Updated By	Last Updated Date	Actions
ASN-PO000020	Pending Receipt	03/28/22	CrossCountry Consulting	03/20/22	<input type="button" value="Edit"/> <input type="button" value="Cancel"/>

Navigate to ASN tab to edit or cancel ASN.

# 10 Invoicing Overview

## INVOICING

# 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](mailto:ap.uk@thetradedesk.com)

Billed to The Trade Desk United States entity:

- [ap@thetradedesk.com](mailto:ap@thetradedesk.com)



## INVOICING

# 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](mailto:ap.uk@thetradedesk.com)
  - Billed to The Trade Desk United States entity:
    - [ap@thetradedesk.com](mailto: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 Description
- Invoice Number
- Service dates, if applicable
- Full name and Address
- Amount Due
- Remittance Address
- Currency and Foreign Currency rate, when applicable.
- Supplier Bank Details
- Valid PO Number (when applicable)
- The Trade Desk Legal Entity
- Project Number (when applicable)
- Payment Terms
- 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](mailto:ap.uk@thetradedesk.com)
- Billed to The Trade Desk United States entity:
  - [ap@thetradedesk.com](mailto:ap@thetradedesk.com)

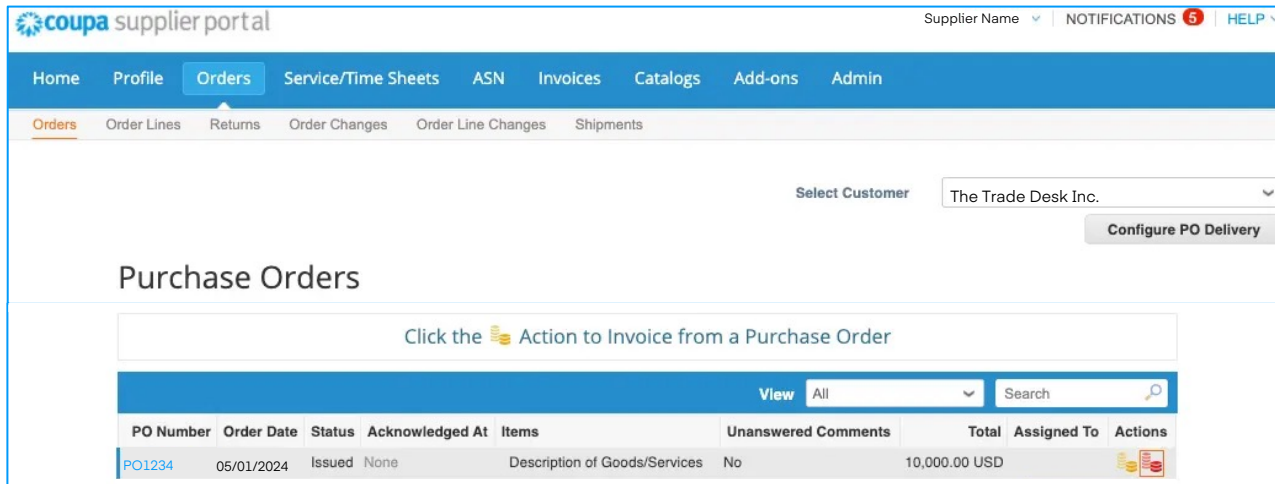




# Invoice Glossary

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

\* Legal Entity  [+ Add New](#)

\* Remit-To

\* Ship From Address

Cancel

**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

Choose Invoicing Details

\* Legal Entity  + Add New

Invoice From 42 Surfer Drive  
Ventura, CA 93001  
United States  
United States

\* Remit-To  + Add New

\* Ship From Address  + Add New

Cancel Save

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

Select Customer The Trade Desk

Create Invoice Create

**General Info**

\* Invoice #

\* Invoice Date  Calendar icon

Payment Term

\* Currency  Dropdown arrow

Delivery Number

Status

Invoice Attachment  No file chosen

Supplier Note

Attachments Info icon [Add File](#) | [URL](#) | [Text](#)

**From**

\* Supplier  Supplier Name

Supplier Tax ID  Dropdown arrow

\* Invoice From Address  Supplier Name  
 42 Surfer Drive  
 Ventura, CA 93001  
 United States

\* Remit-To Address  Supplier Name  
 42 Surfer Drive  
 Ventura, CA 93001  
 United States

\* Ship From Address  Supplier Name  
 42 Surfer Drive  
 Ventura, CA 93001  
 United States

**To**

Customer

\* Bill To Address  The Trade Desk, Inc.  
 42 N. Chestnut Street  
 Ventura, California 93001  
 United States

Buyer Tax ID  Dropdown arrow

Ship to Address  101 Beach Place  
 Ventura, CA 93001  
 United States

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

Lines  Line Level Taxation

Type	Description	Price	
	<input type="text" value="May24 Surfboards"/>	<input type="text" value="6,000.00"/>	6,000.00

PO Line: 797-1    Service/Time Sheet Line: None    Contract:     Supplier Part Number:

Billing: 1000-69030-650280-0000-000-0000-300000002690524

[+ Add Line](#)   [+ Pick lines from Contract](#)

**Totals & Taxes**

Lines Net Total	6,000.00
Shipping	<input type="text"/>
Handling	<input type="text"/>
Misc	<input type="text"/>
Tax	<input type="text"/> % <input type="text"/>
Total Tax	0.00
Net Total	6,000.00
<b>Total</b>	<b>6,000.00</b>

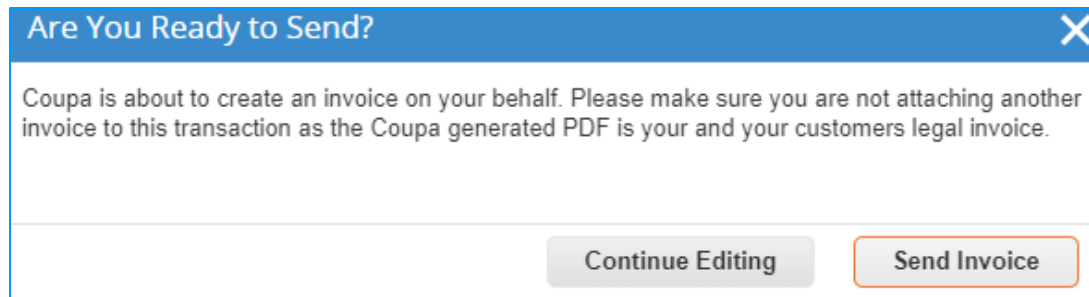
Continuing, scrolling down the page, locate the line level of the invoice and fill in the information.

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

coupa supplier portal NOAH | NOTIFICATIONS 1 | HELP

Home Profile Forecasts **Orders** Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

Setup

Orders Order Lines Returns Order Changes Order Line Changes Order Confirmations Order Confirmation Lines Promised Deliveries Shipments

Select Customer The Trade Desk

## Invoices

✔ Invoice submitted successfully. However - your customer requested an information update to ensure successful payment: Update

**Instructions From Customer**  
 (Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Invoice list page)  
 Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
EK-Test123	04/18/24	Processing	797	6,000.00 USD	No		

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

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'coupa supplier portal' on the left and 'TEST | NOTIFICATIONS 4 | HELP' on the right. Below this is a main menu with 'Home', 'Profile', 'Forecasts', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. The 'Invoices' tab is selected. Underneath, there's a sub-menu with 'Invoices', 'Invoices Lines', 'Payment Receipts', and 'Advanced'. The main content area shows 'Invoices' with a 'Select customer' dropdown set to 'The Trade Desk'. Below that, there's a section for 'Create Invoices' with an information icon. Four buttons are visible: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice', and 'Create Credit Note'. The 'Create Credit Note' button is highlighted with a yellow box. At the bottom, there's a table with columns: Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. A single row is visible with the following data: Test Invoice, 04/06/24, Approved, 777, 1,000.00 USD, No.

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

Credit Note

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason  Resolve issue for invoice number  Other (e.g. rebate)

Select

Cancel Continue

Credit Note

How do you want to correct invoice "Test Invoice" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*

Cancel Create

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

Create Credit Note Create

This credit note applies to invoice [Test Invoice](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

**General Info**

\* Credit Note #  ✓

\* Credit Note Date

Payment Term

\* Currency

Delivery Number

Status

Original Invoice #

Original Invoice Date

Invoice Attachment  No file chosen

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

**From**

\* Supplier

Supplier Tax ID

\* Invoice From Address   
42 Surfer Drive  
Ventura, CA 93001  
United States

\* Remit-To Address   
42 Surfer Drive  
Ventura, CA 93001  
United States

\* Ship From Address   
42 Surfer Drive  
Ventura, CA 93001  
United States

**To**

Customer

\* Bill To Address   
42 N. Chestnut Street  
Ventura, California 93001  
United States

Buyer Tax ID

Ship to Address   
Ventura, CA 93001  
United States  
Location Code: HQ

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

Lines  Line Level Taxation

Adjustment Type Quantity ▼

Type	Description	Qty	UOM	Price	
	Test	-2	Each	500.00	-1,000.00

PO Line  
777-1

Billing  
1000-67030-650280-0000-000-000-000000-300000002690524

Service/Time Sheet Line  
None

Contract  
▼

Supplier Part Number

**Totals & Taxes**

Lines Net Total	-1,000.00
Shipping	<input type="text" value="0.000"/>
Handling	<input type="text" value="0.000"/>
Misc	<input type="text" value="0.000"/>
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
Total Tax	0.00
Net Total	-1,000.00
<b>Total</b>	<b>-1,000.00</b>

Delete Cancel Save as Draft Calculate Submit

Review the information and **Submit.**

# Create a Credit Note in CSP

**Are You Ready to Send?** ✕

Coupa is about to create a credit note on your behalf. Please make sure you are not attaching another credit note to this transaction as the Coupa generated PDF is your and your customer's legal credit note.

Continue Editing Send Credit Note

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

Home Profile Forecasts Orders Service/Time Sheets ASN **Invoices** Catalogs Business Performance Sourcing Add-ons

Setup

**Invoices** Invoices Lines Payment Receipts Advanced

Select customer

### Invoices

Test Coupa Supplier credit note #CN Test is processing ✕

Instructions From Customer

Create Invoices ?

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to  View  Search

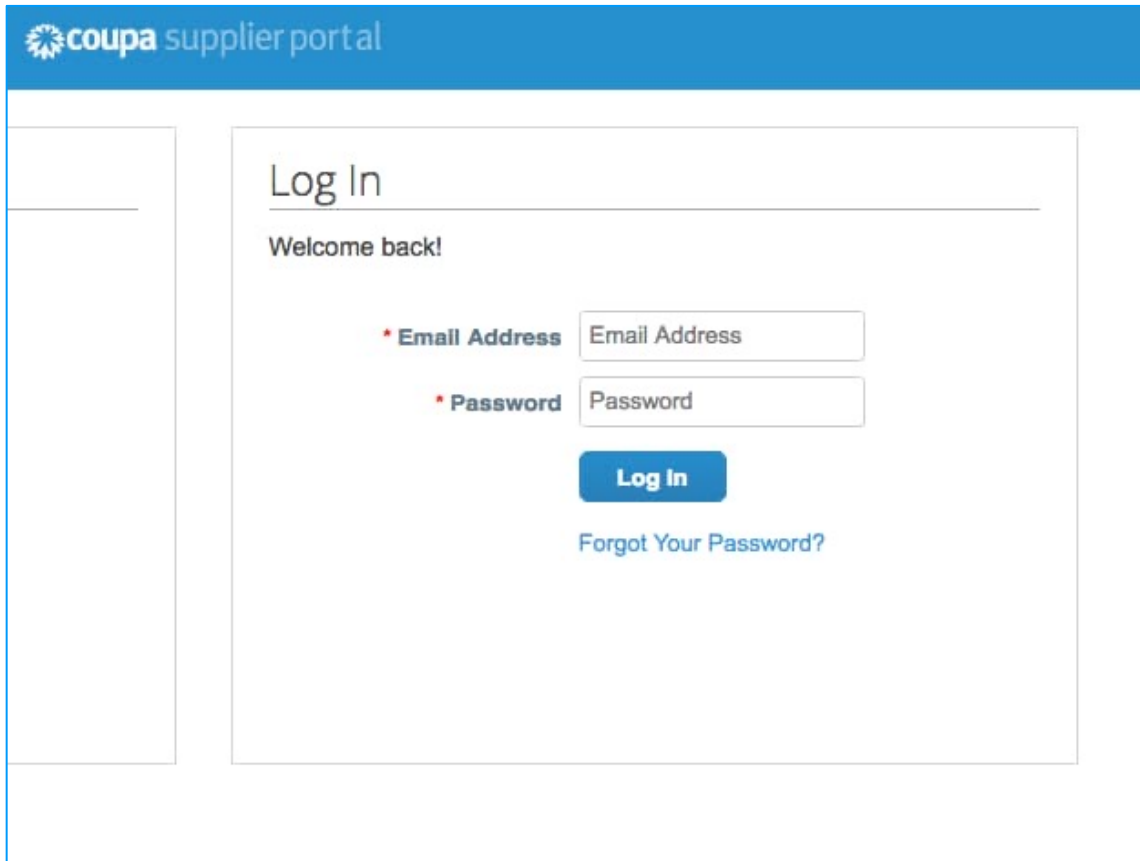
Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
CN Test	04/23/24	Processing	777	-1,000.00 USD	No		
Test Invoice	04/06/24	Approved	777	1,000.00 USD	No		

Per page 15 | 45 | 90

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

# **12** Coupa Supplier Portal (CSP) Overview

# Logging In

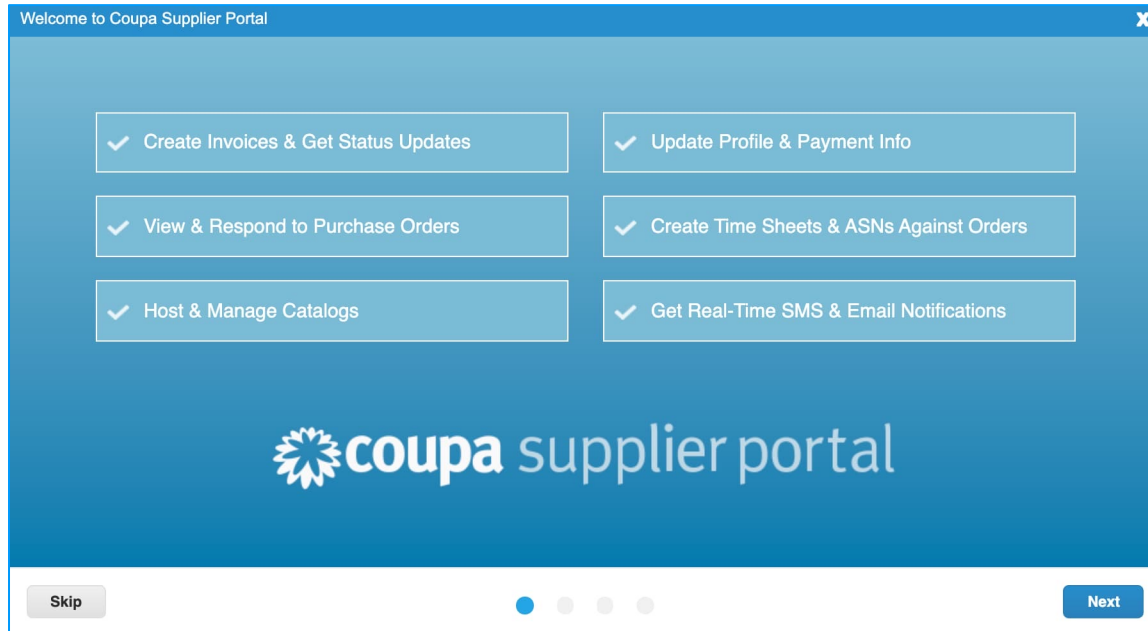


The screenshot shows the Coupa Supplier Portal login interface. At the top, there is a blue header with the Coupa logo and the text "coupa supplier portal". Below the header, the main content area is titled "Log In" and includes a "Welcome back!" message. There are two input fields: "Email Address" and "Password", both with red asterisks indicating required fields. Below the input fields is a blue "Log In" button and a link labeled "Forgot Your Password?".

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.

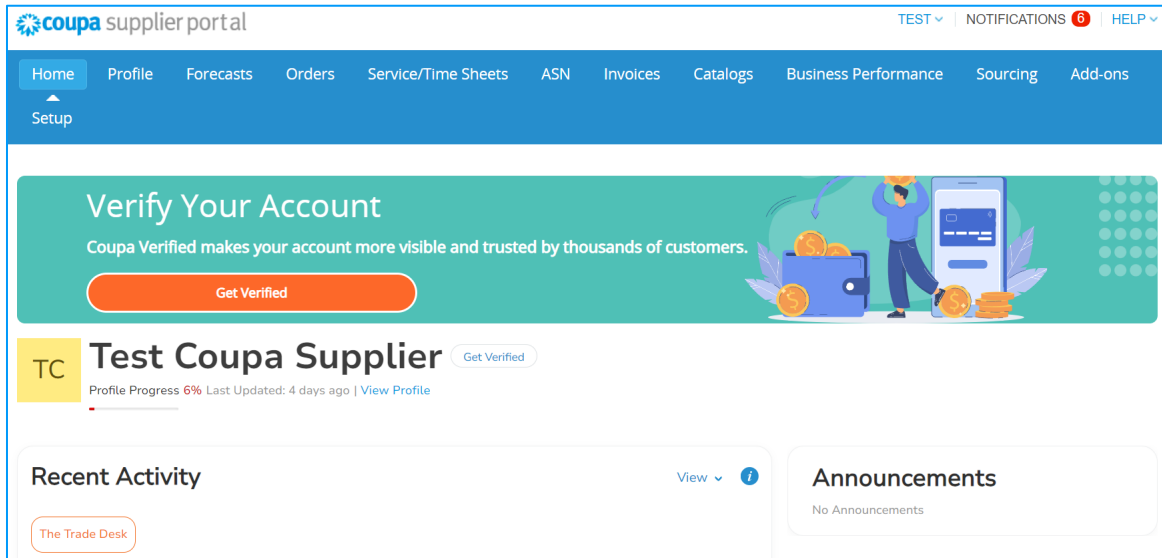
# Coupa Supplier Portal Tour



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

coupa supplier portal

TEST | NOTIFICATIONS 6 | HELP

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogs Business Add-ons

Setup

Account Settings

Notification Preferences

Log Out

### My Account Settings

**Settings**

Notification Preferences

Security & Multi Factor Authentication

#### User Details

\* First Name

\* Last Name

\* Email

Department

Role

Save

#### Change Password

\* Current Password

\* Password

Use at least 8 characters and include a number and a letter.

\* Password Confirmation

Save

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

# Notifications and Settings

coupa supplier portal

TEST | NOTIFICATIONS 6 | HELP

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Pricing Add-ons

Setup

### My Account Notification Preferences

You will start receiving notifications when your customers enable them.

Email  Mobile(SM)

⚠ Verify number to receive SMS

#### Account Access

Request to Join	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
Merge Request	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS

#### Announcements

New Customer Announcement	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
---------------------------	--	--------------------------------	------------------------------

#### Business Performance

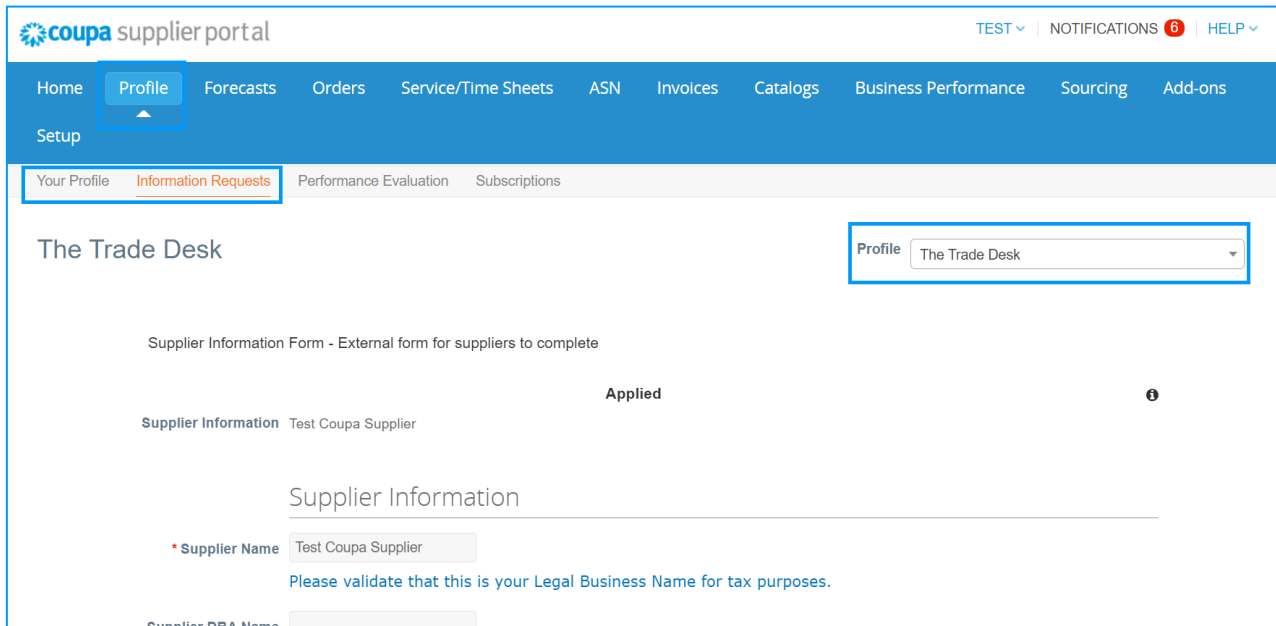
Business Performance Role Granted	<input checked="" type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
-----------------------------------	--	--------------------------------	------------------------------

#### Catalogs

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
---------------------------	--	---	------------------------------

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

The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'Home', 'Profile', 'Forecasts', 'Orders' (highlighted), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this is a sub-menu for 'Orders' with options like 'Order Lines', 'Returns', 'Order Changes', etc. A 'Select Customer' dropdown is set to 'The Trade Desk'. The main content area is titled 'Purchase Orders' and includes an 'Instructions From Customer' section with a text box containing the instruction: 'Click the [gold stack icon] Action to Accept the Purchase Order and Create an Invoice using its data'. Below this is a table of purchase orders.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
777	04/03/24	Issued	None	2 Each of Test	No	1,000.00 USD		[Gold Stack Icon]
776	04/03/24	Issued	None	Test	No	1,000.00 USD		[Gold Stack Icon]

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

coupa supplier portal TEST | NOTIFICATIONS 7 | HELP

Home Profile Forecasts Orders Service/Time Sheets ASN **Invoices** Catalogs Business Performance Sourcing Add-ons

Setup

Invoices Invoices Lines Payment Receipts

Select Customer The Trade Desk

## Invoices

Instructions From Customer

Create Invoices *i*

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to View All Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
<a href="#">Test Invoice</a>	04/06/24	Pending Approval	777	1,000.00 USD	No		

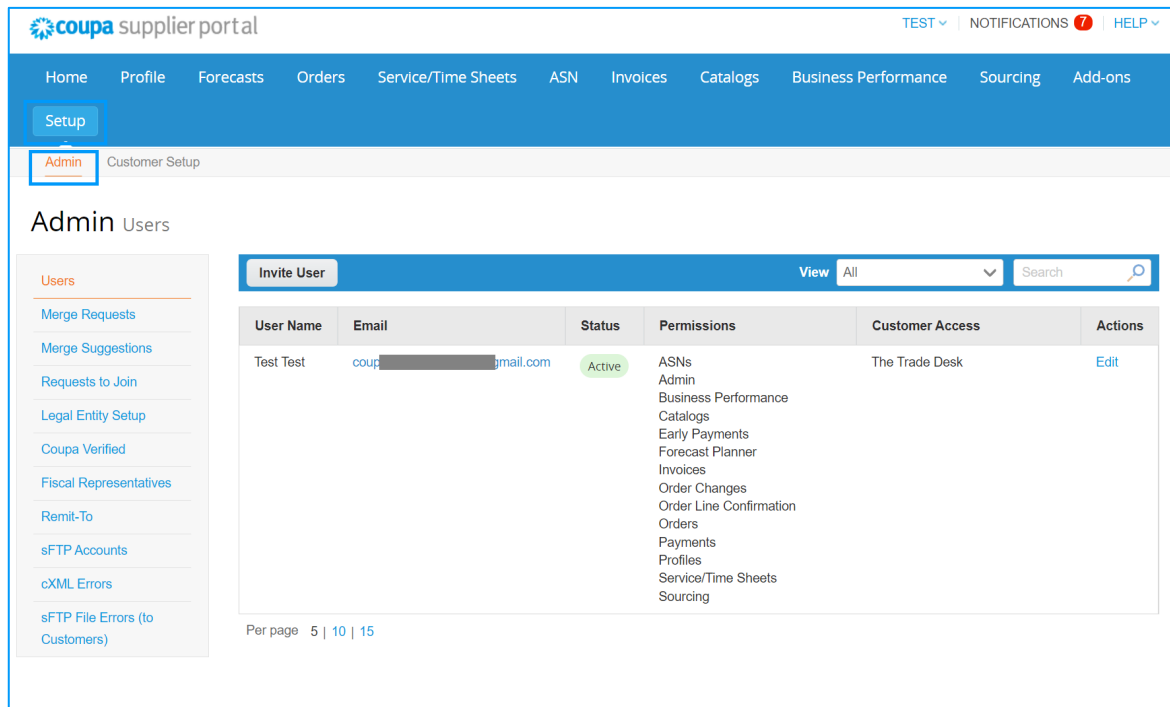
Per page 15 | 45 | 90

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



coupa supplier portal TEST NOTIFICATIONS 7 HELP

Home Profile Forecasts Orders Service/Time Sheets ASN Invoices Catalogs Business Performance Sourcing Add-ons

Setup

Admin Customer Setup

Admin Users

Users

Merge Requests

Merge Suggestions

Requests to Join

Legal Entity Setup

Coupa Verified

Fiscal Representatives

Remit-To

sFTP Accounts

cXML Errors

sFTP File Errors (to Customers)

Invite User View All Search

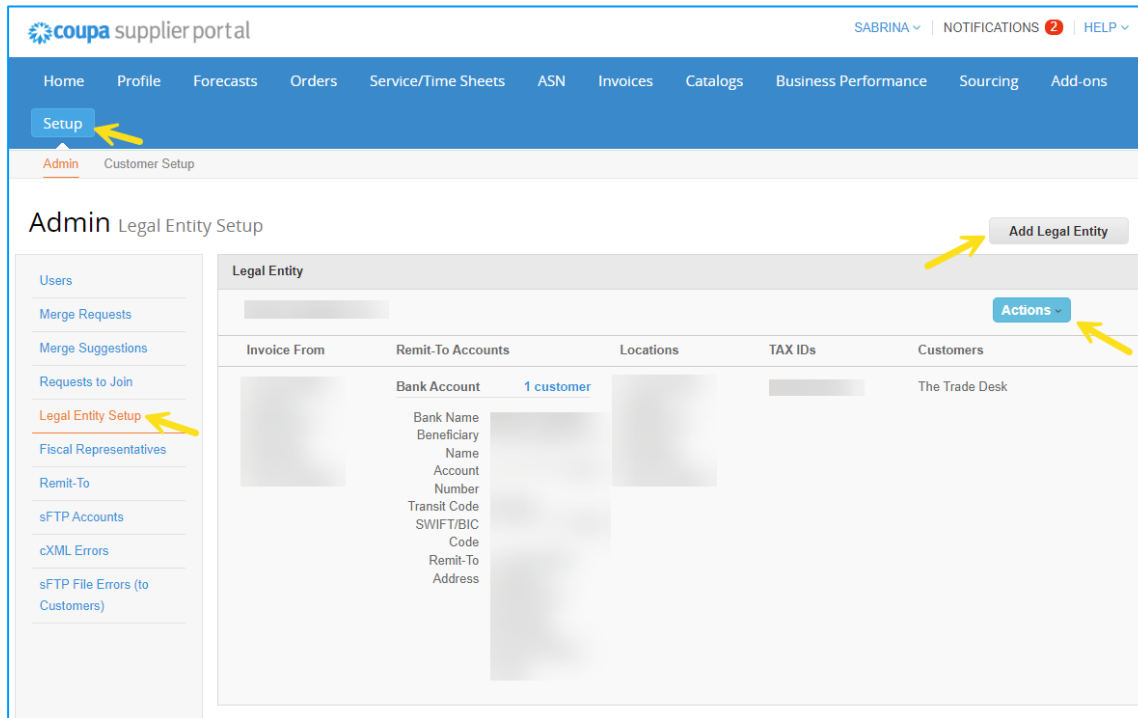
User Name	Email	Status	Permissions	Customer Access	Actions
Test Test	coup[redacted]@gmail.com	Active	ASNs Admin Business Performance Catalogs Early Payments Forecast Planner Invoices Order Changes Order Line Confirmation Orders Payments Profiles Service/Time Sheets Sourcing	The Trade Desk	Edit

Per page 5 | 10 | 15

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

## 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](mailto:ap@thetradedesk.com)

Outside the United States - [ap.uk@thetradedesk.com](mailto:ap.uk@thetradedesk.com)

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

The Trade Desk Purchasing Team:

Global - [purchasing@thetradedesk.com](mailto:purchasing@thetradedesk.com)

**For Purchase Order assistance:**

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