theTradeDesk®

NEW SUPPLIER ONBOARDING GUIDE

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01 The Trade Desk – Benefits of Coupa Supplier Portal

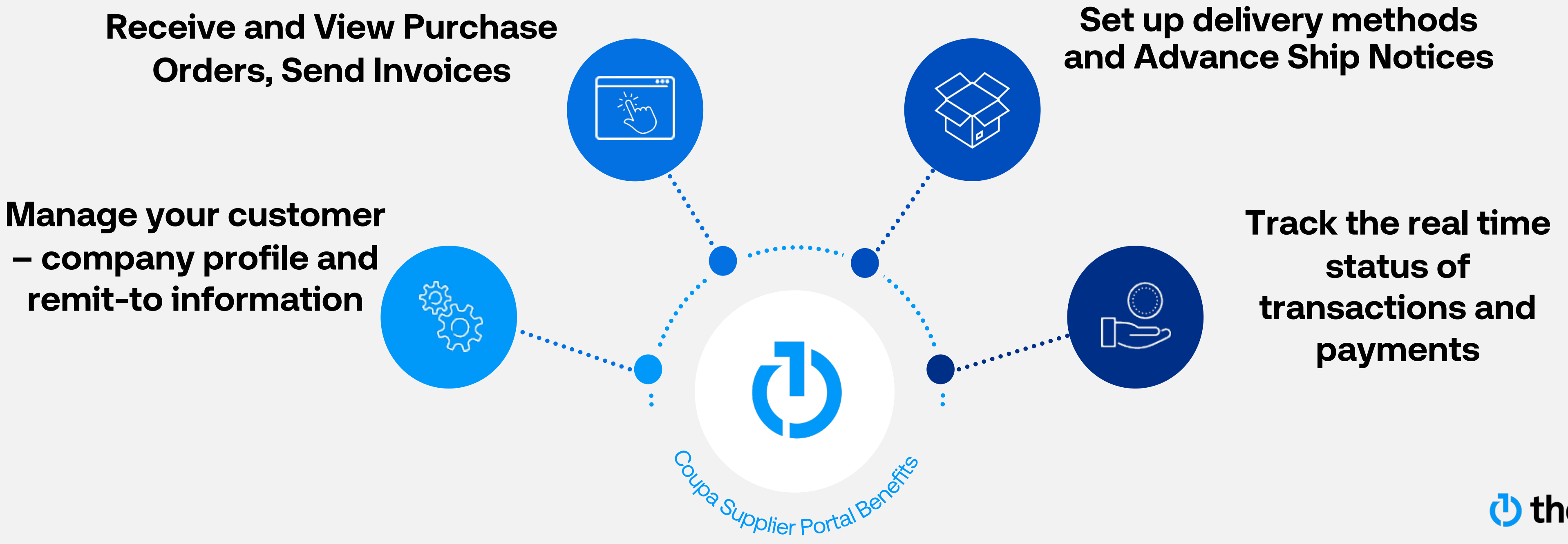
theTradeDesk

Joining The Trade Desk's Supplier Management Platform

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

Benefits of the Coupa Supplier Portal:

- Easy to use interface!
- Convenient visibility into TTD purchase Orders, the status of your invoices and payments, as well as managing your company contact information.
- No software or hardware to download
- Free of charge – There is no cost to you!



Steps to a Successful Supplier Onboarding

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

theTradeDesk

02 Invitation to The Trade Desk's Supplier Database

Supplier Database Invitation Overview

The Coupa Supplier Portal (CSP) streamlines business interactions with The Trade Desk for suppliers. Easily manage account details, transactions, and invoicing.

- The Trade Desk will invite you to the Coupa Supplier Portal to complete the supplier onboarding form and join our database of suppliers.
- If you currently use the Coupa Supplier Portal (CSP), we will need to send you an invitation to connect your CSP account prior to receiving the Supplier Onboarding Form invitation.
- Please reach out to your buyer or accounts payable to receive an invitation. Invitations to the CSP expire after 30 days.

Supplier Database Invitation Overview

The Trade Desk will need to initiate an invite to connect through the Coupa Supplier Portal. This can be initiated in two ways:

Profile Information Request

A Profile Information Request to join from The Trade Desk to you, the supplier.

Purchase Order

The option to join when receiving a Coupa Purchase Order from The Trade Desk.

If you have not already been invited, please contact us!

Suppliers within the United States

ap@thetradedesk.com

Suppliers outside the United States

ap.uk@thetradedesk.com

03 Creating an account with Coupa

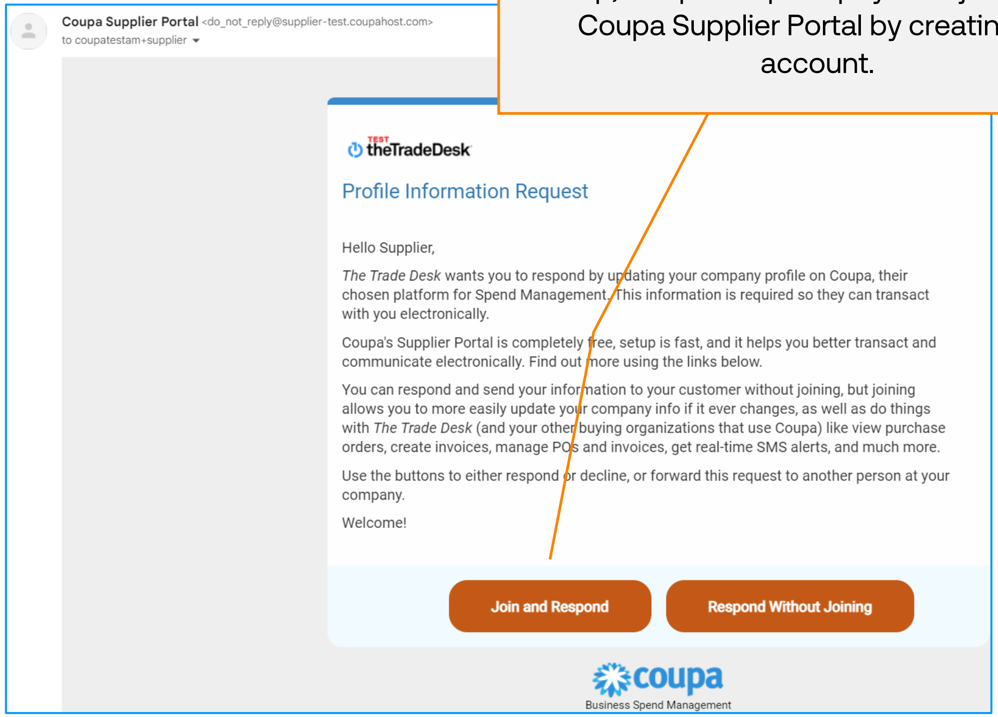
Creating a Coupa Supplier Portal (CSP) Account

Utilize this guide if you are not a current user of Coupa Supplier Portal and need to set up an account to provide updated account information to The Trade Desk.

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 may ask you to re-fill out the Supplier Update Form again if there is an error with your form.

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 <do_not_reply@supplier-test.coupahost.com>
to coupatestam+supplier

TEST theTradeDesk

Profile Information Request

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!

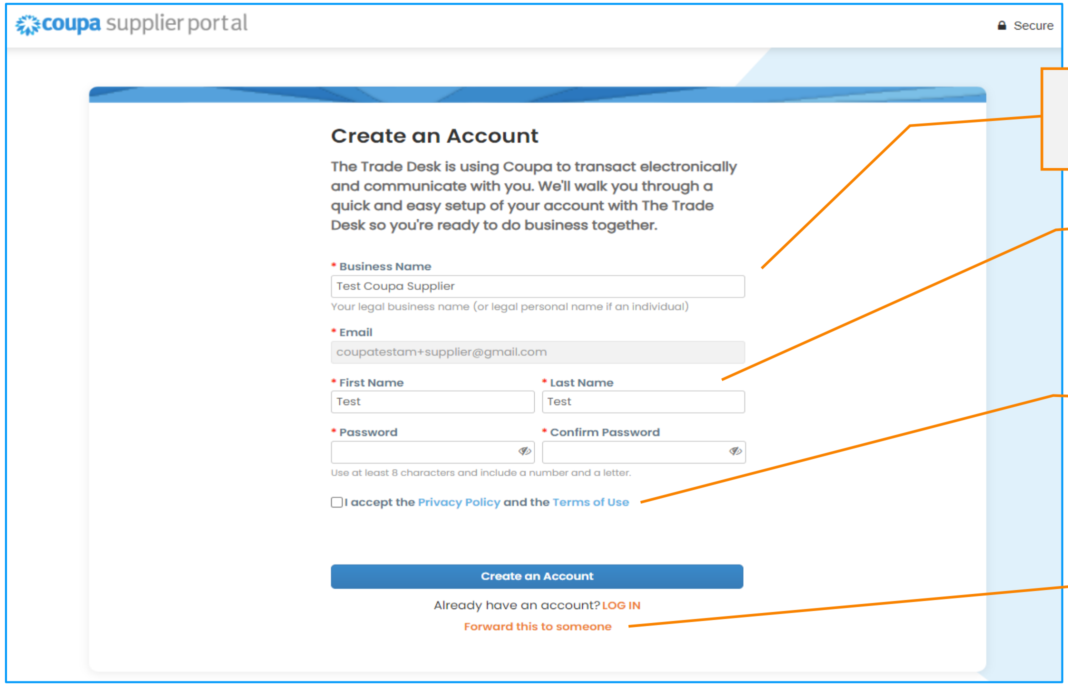
Join and Respond | Respond Without Joining

coupa
Business Spend Management

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**.

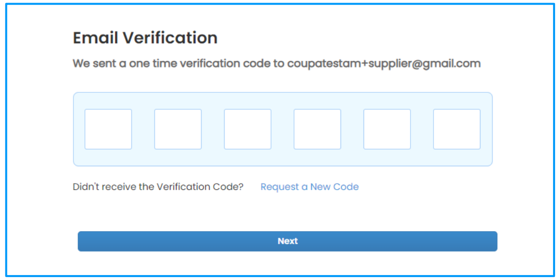
Tick the **I accept the Privacy Policy** and **Terms of Use** and click **Get Started**.

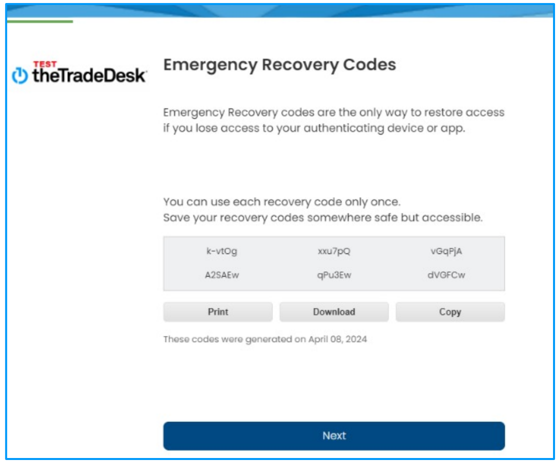
Link to **Forward this to someone**

TIP: Not the correct point of contact at your company to fill out the supplier update form? No worries! You can forward the invitation by clicking "**Forward this to someone**." You will need to enter an email address with the same domain.

theTradeDesk

Coupa Supplier Portal – Join and Respond

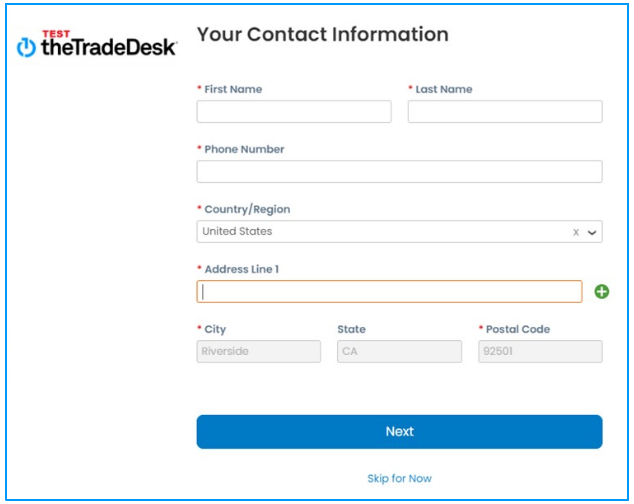


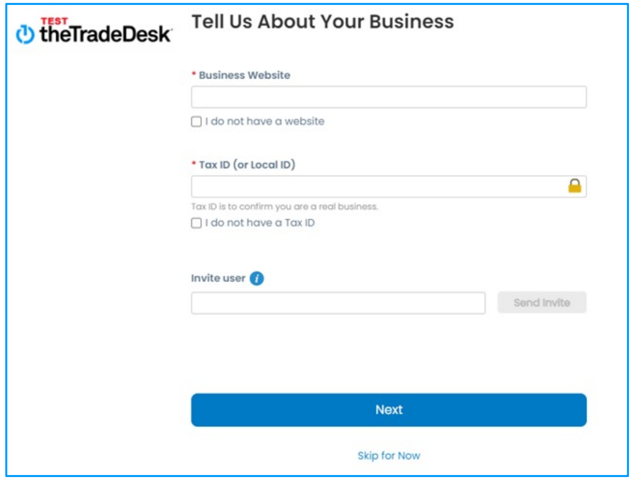


Once you have created your login, you will receive an email verification pop-up. Go to your email to find the combination and click **Next.**

Coupa requires you to Secure Your Payment Information. Follow their instructions to secure your account. Coupa will provide Emergency Recovery Codes for your account.

Coupa Supplier Portal – Join and Respond

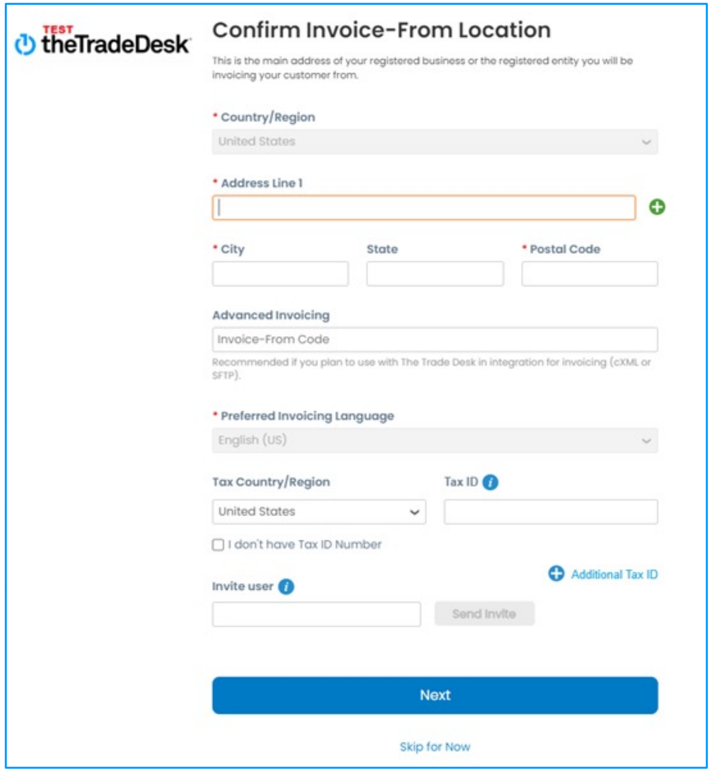




Once verification codes are provided, you will be prompted to re-confirm and add contact information details as needed. Complete the section and Select **Next** to **fully set up your profile**. It is **<u>not recommended to</u>** select the **Skip for Now** option.

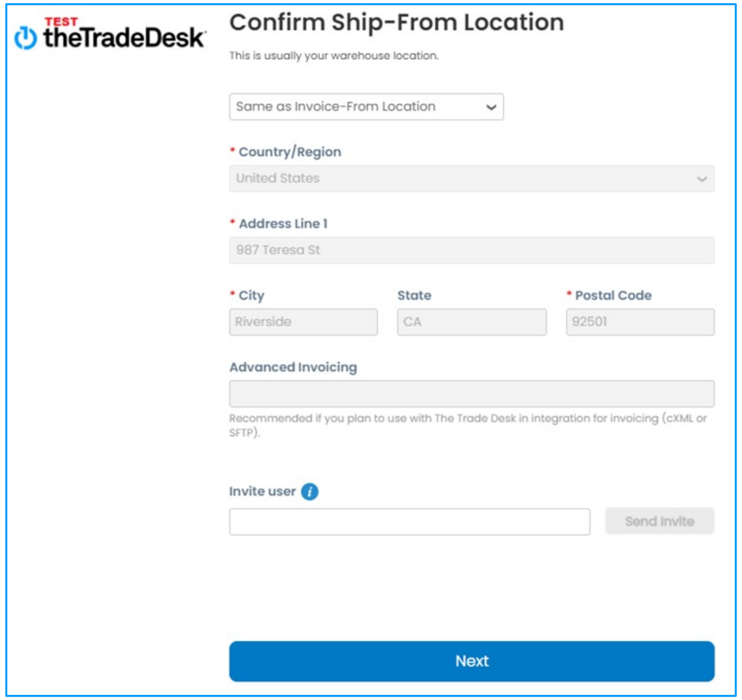
Complete the **Tell us About your Business** section and click **Next**

Coupa Supplier Portal – Join and Respond



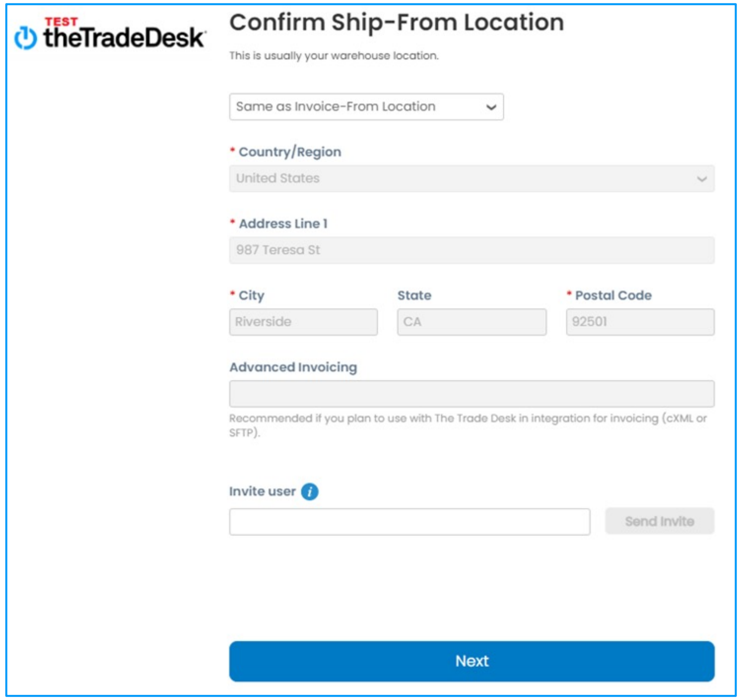
Complete the **Confirm Invoice-From Location**, your address will automatically be populated into the required fields. Please ensure to verify it is accurate. You may correct information as needed.

Coupa Supplier Portal – Join and Respond



Complete the **Confirm Ship-From** location. Your address will automatically be populated into the required fields. Please ensure to verify it is accurate. You may correct information as needed.

Coupa Supplier Portal – Join and Respond



Move to the next screen by selecting **Take Me There** to be directed to complete The Trade Desk's Supplier Onboarding Form.

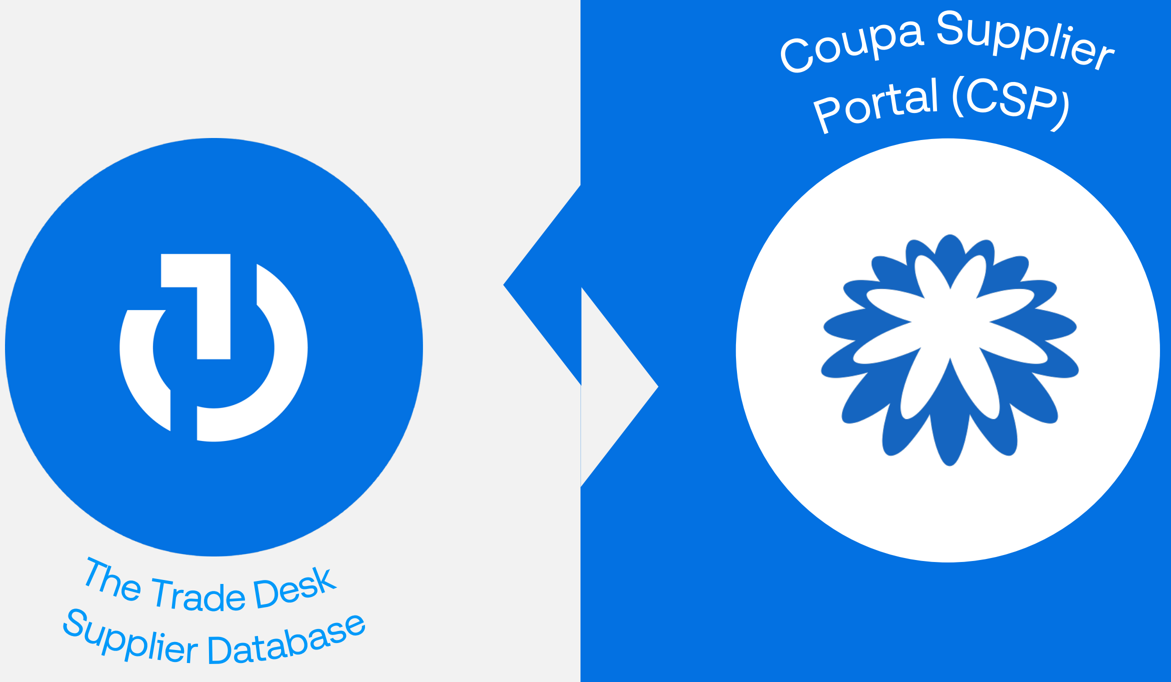
04 Connect your CSP Account with The Trade Desk

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 onboard.

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

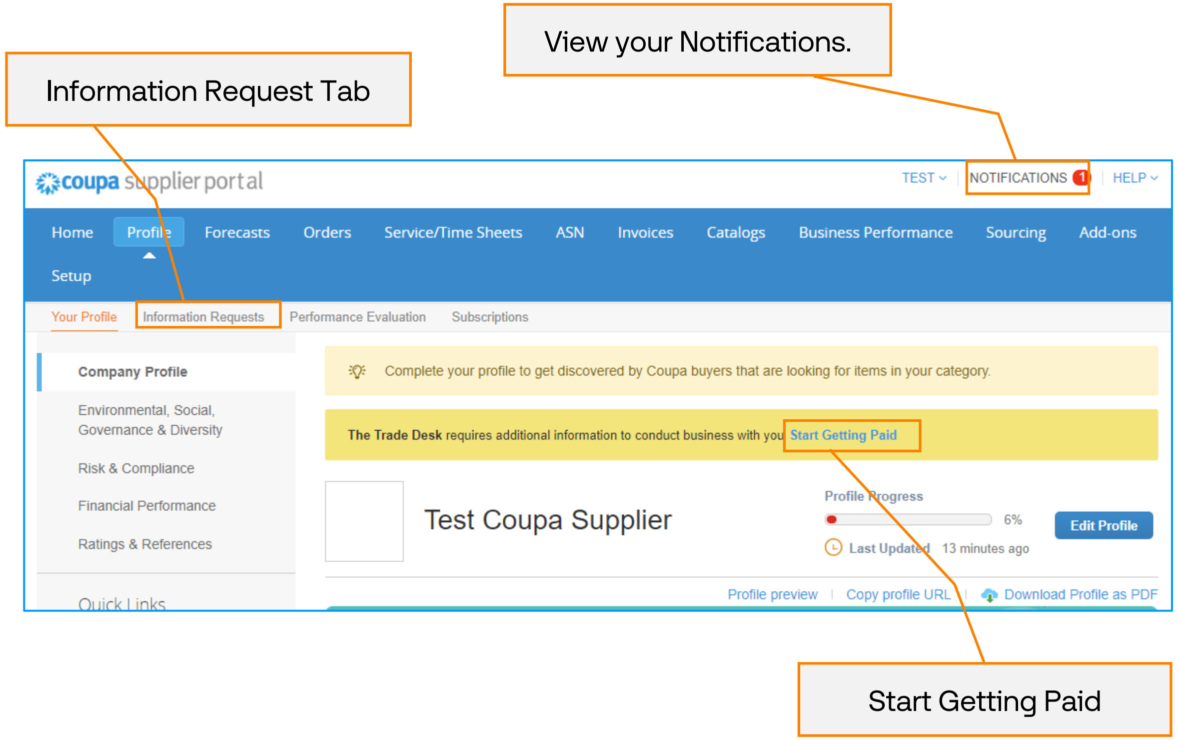
coupa
Business Spend Management

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 will be automatically prompted to complete our Supplier Onboarding Form.

05 Supplier Onboarding Form Guide

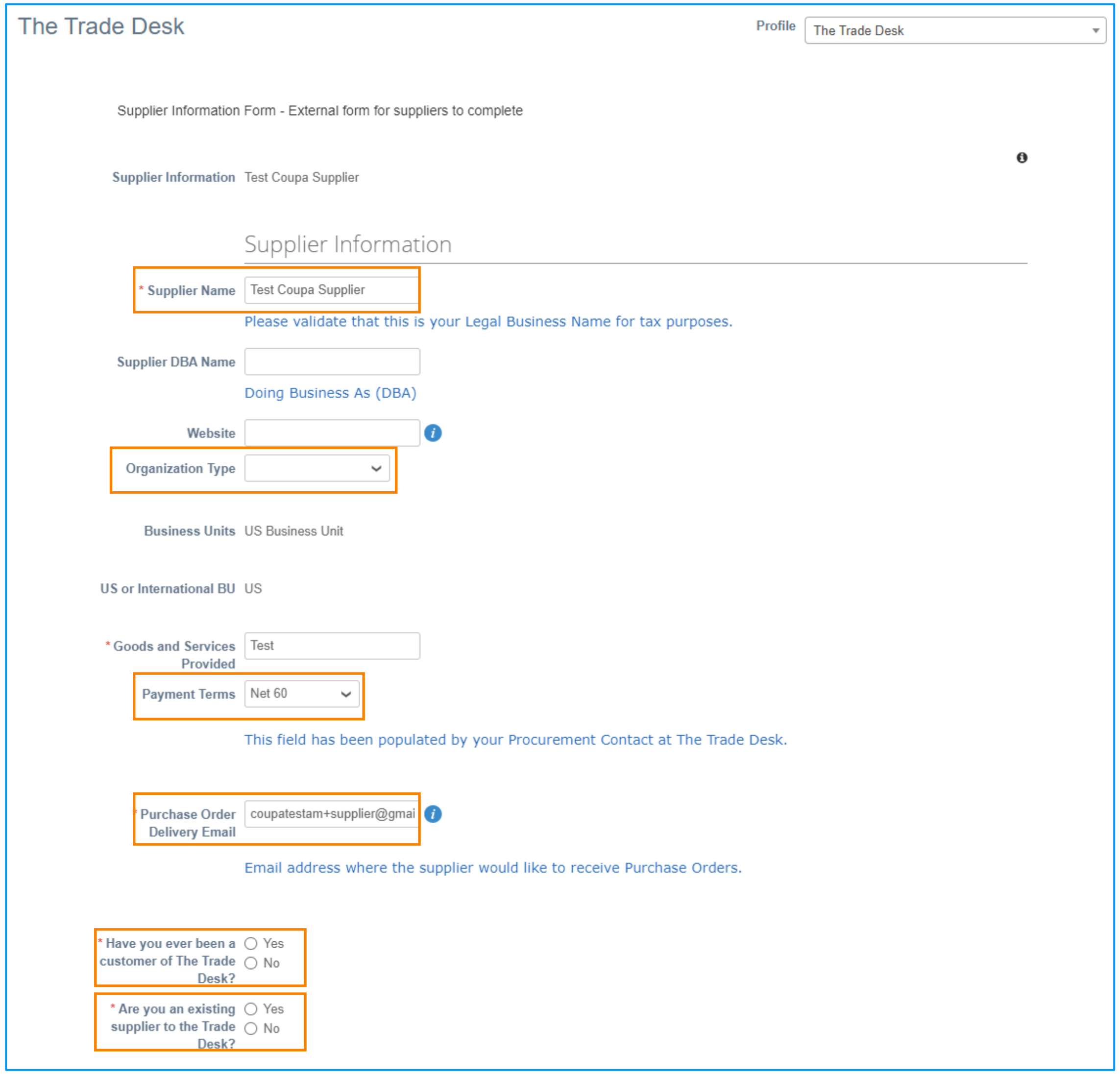
Locating the Onboarding Form



If you are joining the CSP for the first time, at the end of setting up your CSP account you will be automatically directed to fill out The Trade Desk's Supplier Onboard form. If you choose to leave and come back, there are a few places you can locate the request for information from The Trade Desk.

When selecting one of these options, The Trade Desk Supplier Information Form will populate. Some information will be prepopulated for you, but you are able to make corrections, where applicable. You will be guided to enter necessary information for The Trade Desk to pay you efficiently.

Supplier Onboard Form


The Trade Desk

Profile: The Trade Desk

Supplier Information Form - External form for suppliers to complete

Supplier Information: Test Coupa Supplier

Supplier Information

* Supplier Name: Test Coupa Supplier

Please validate that this is your Legal Business Name for tax purposes.

Supplier DBA Name:

Doing Business As (DBA)

Website:

Organization Type:

Business Units: US Business Unit

US or International BU: US

* Goods and Services Provided: Test

Payment Terms: Net 60

This field has been populated by your Procurement Contact at The Trade Desk.

Purchase Order Delivery Email: coupatestam+supplier@gmai

Email address where the supplier would like to receive Purchase Orders.

* Have you ever been a customer of The Trade Desk? Yes / No

* Are you an existing supplier to the Trade Desk? Yes / No

Enter all the information requested.

For **Supplier Name**, add your legal tax name.

Organization Type is what can typically be found on a tax form, but please note The Trade Desk has the ability to update this information.

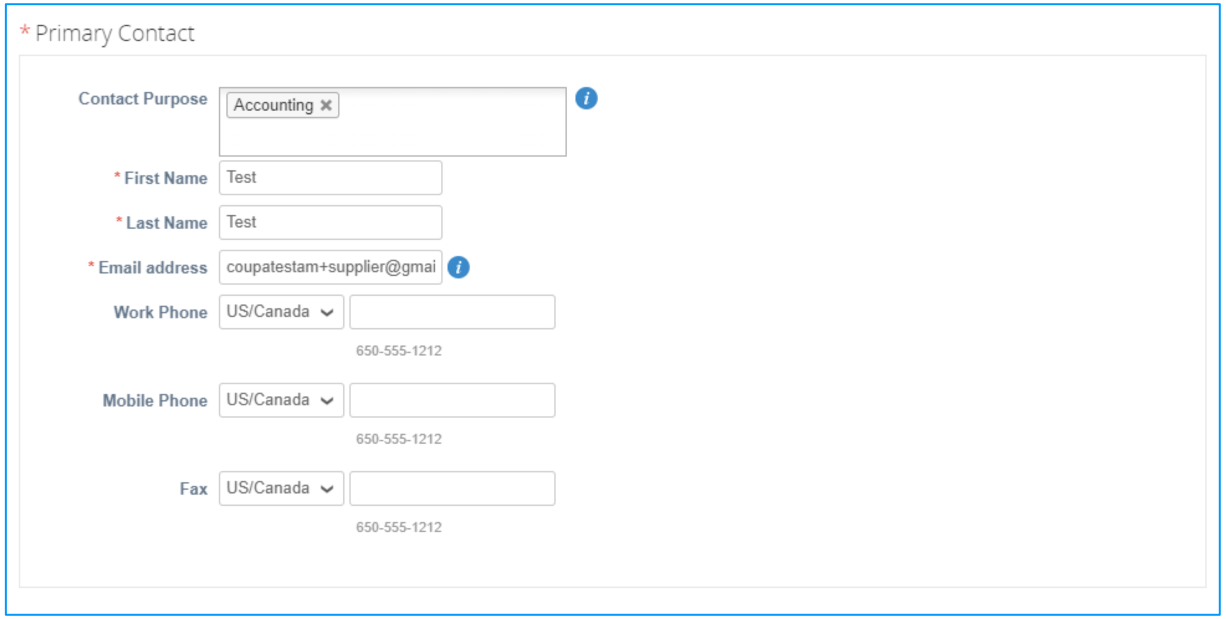
Add the **Goods or Services** description of what you are providing.

For **Payment Terms**, add the agreed upon terms should populate from your procurement contact, reach out to them if there is a discrepancy prior to making a change to your form.

Add your **Purchase Order Delivery Email** where you would like to be informed and provided with your PO.

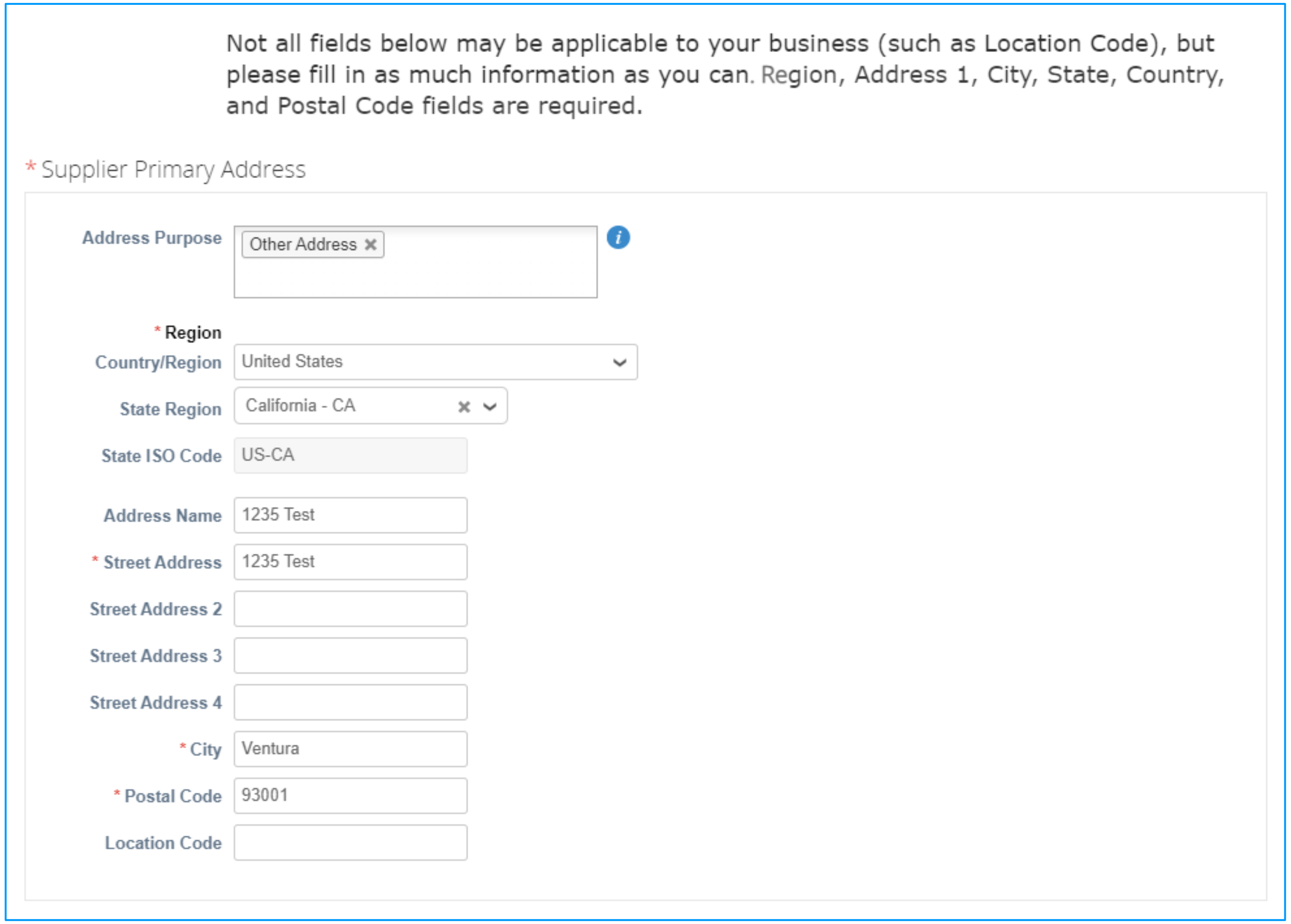
If you are a **Customer** and/or are **Currently a Supplier** with The Trade Desk, please indicate in the correct field.

Primary Contact



For **Primary Contact**, add the contact information of the person The Trade Desk can communicate with from your company.

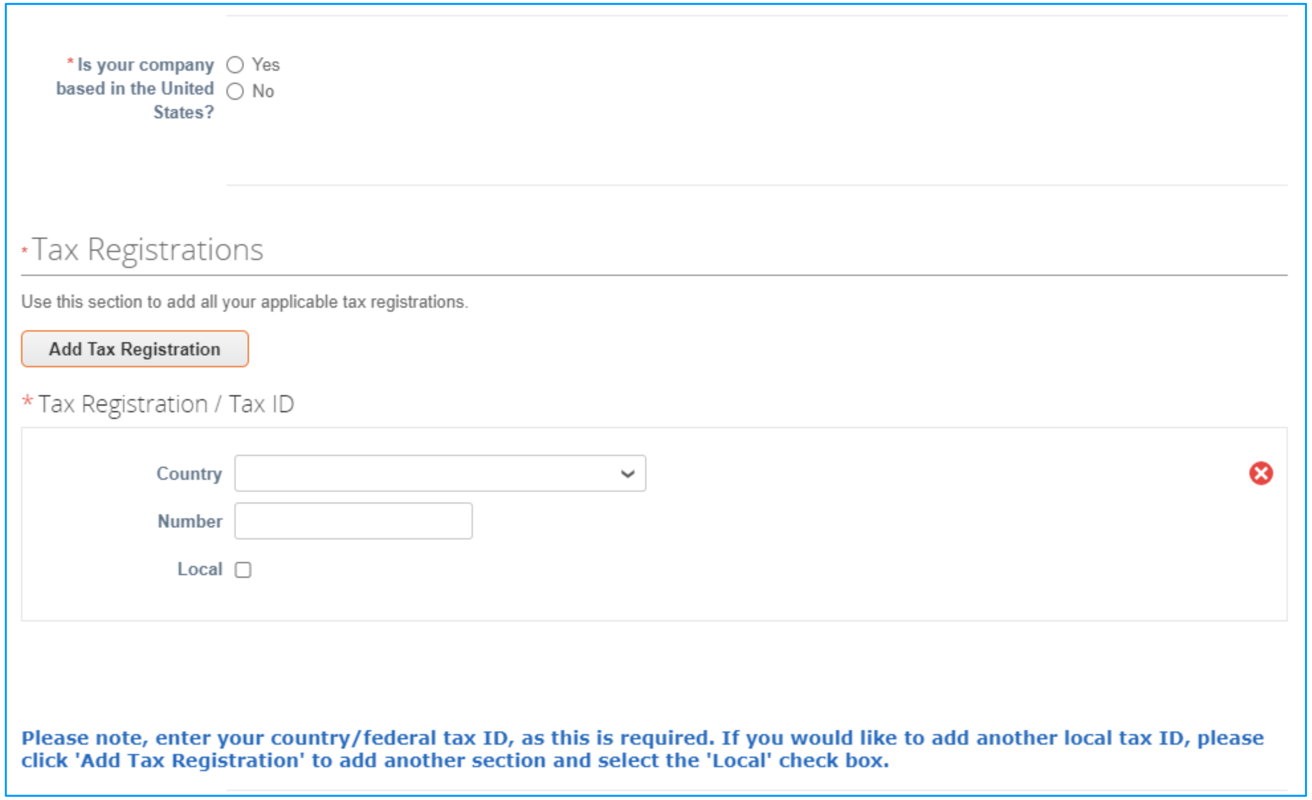
Primary Address



When adding the **Supplier Primary Address**, please indicate the address typically found on your tax registration forms. If you utilize a different address, please be sure to add the Address Purpose.

Fill out as much as you can utilizing the fields that may be applicable for your country.

Tax Registrations



* Is your company based in the United States?

- Yes
- No

* Tax Registrations

Use this section to add all your applicable tax registrations.

Add Tax Registration

* Tax Registration / Tax ID

Country

Number

Local

Please note, enter your country/federal tax ID, as this is required. If you would like to add another local tax ID, please click 'Add Tax Registration' to add another section and select the 'Local' check box.

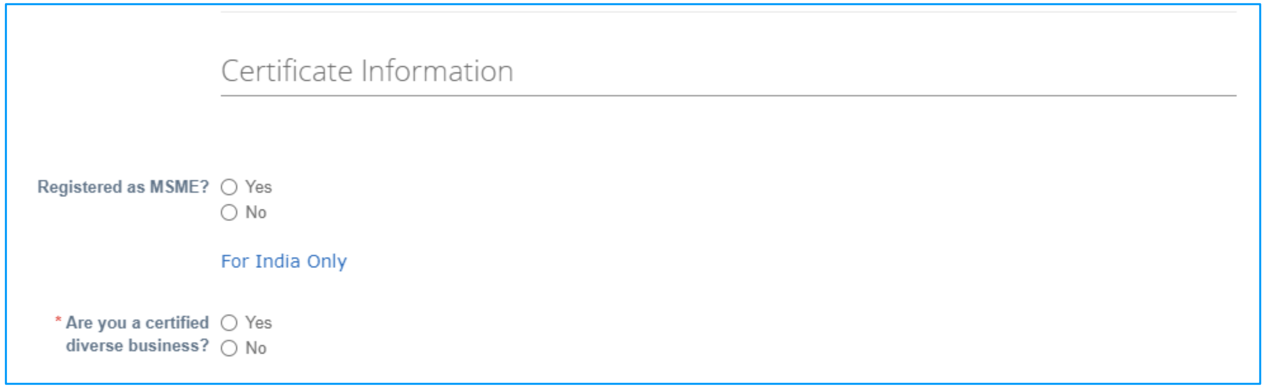
Add your **tax registration information**. If you are based within the United States, please indicate so.

If you select Yes, you will be required to attach a W9 United States Federal Tax Form.

If you select No, you will be required to attach a W8BEN (Individuals) or W8BEN-E (Business Entity's) United States Tax form.

Add the Tax Registration and Tax Id for your country.

Certificate Information

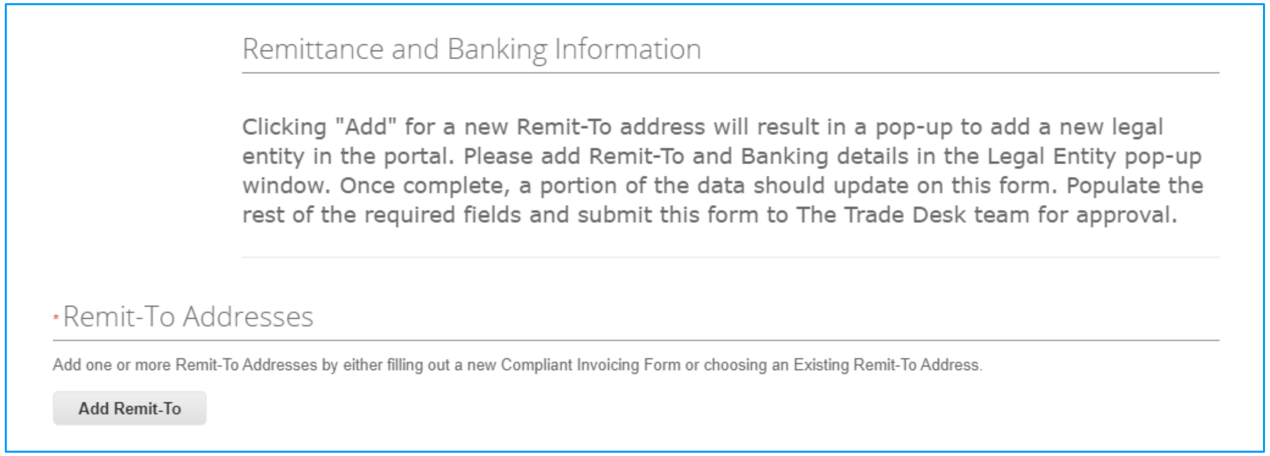


You will be able to add **Certificate Information**.

If you are located in India, please fill out the MSME selection.

Please indicate if you are a certified Diverse Business.

Remit – To Information


Remittance and Banking Information

Clicking "Add" for a new Remit-To address will result in a pop-up to add a new legal entity in the portal. Please add Remit-To and Banking details in the Legal Entity pop-up window. Once complete, a portion of the data should update on this form. Populate the rest of the required fields and submit this form to The Trade Desk team for approval.

*Remit-To Addresses

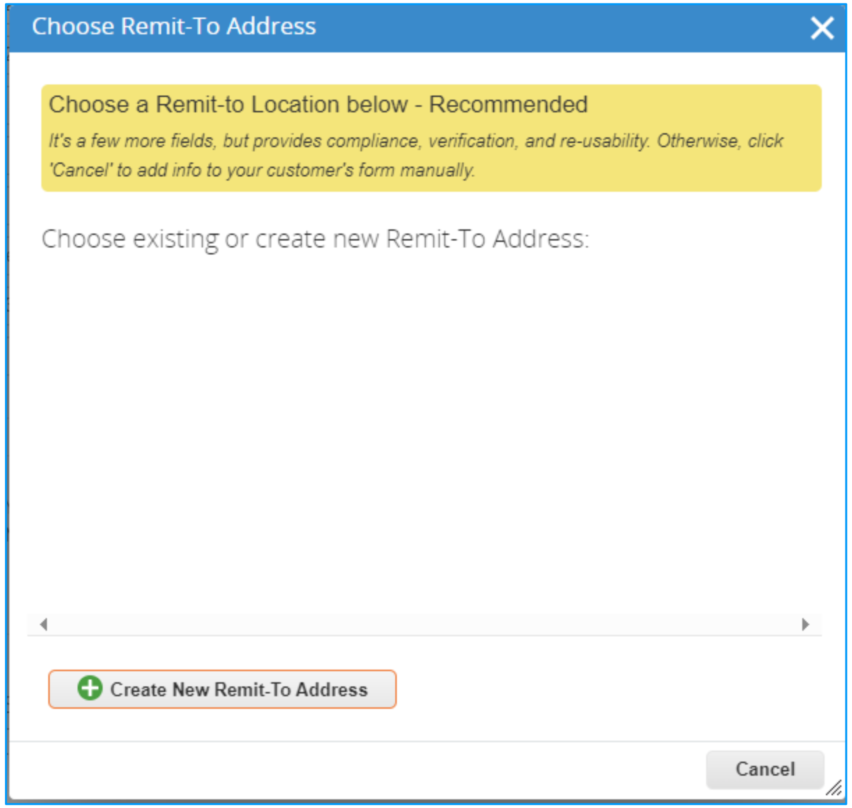
Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

Remittance Information is an important step in order for your company to receive payment.

Select **Add Remit-To**.

Remit – To Information

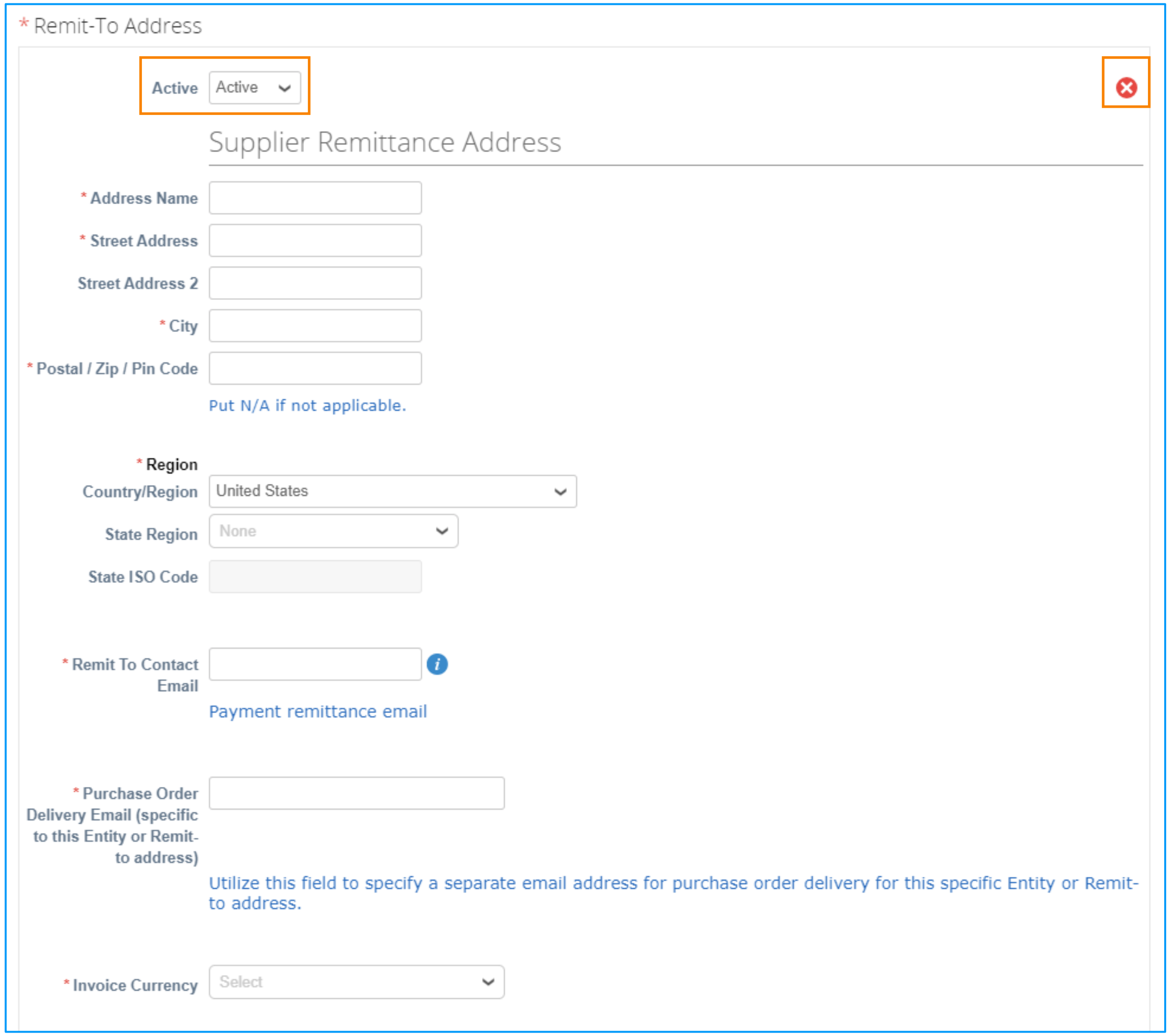


You may select from existing information which you may have filled out within your Coupa Supplier Portal prior to starting this form.

By choosing **Create New Remit-To Address,** you can add an address to your CSP profile. This address can be used for The Trade Desk and shared with other companies requesting your information.

Click **Cancel** if you would like to continue and enter directly on The Trade Desk Onboarding Form.

Remit – To Information


* 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: None

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: Select

When entering information, we kindly ask you **DO NOT change the active status** of your remit-to information or delete it.

If you deactivate or delete the information it will disrupt any inflight payments or information processing by The Trade Desk.

Complete the Supplier Remittance Address section.

Be sure to add the emails where you would like to be notified of payment and purchase orders.

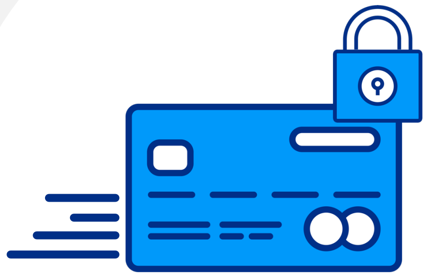
Please add the currency you expect to submit on your invoices for this remit-to location.

Supplier Information– Payment Method Guide

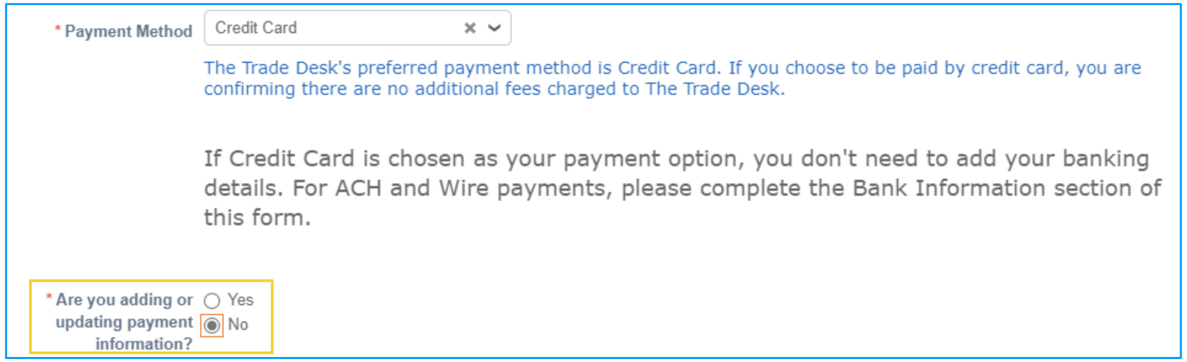
The Trade Desk approved forms of payments are Credit Card, ACH, and Wire. **We do not offer check payments.**

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

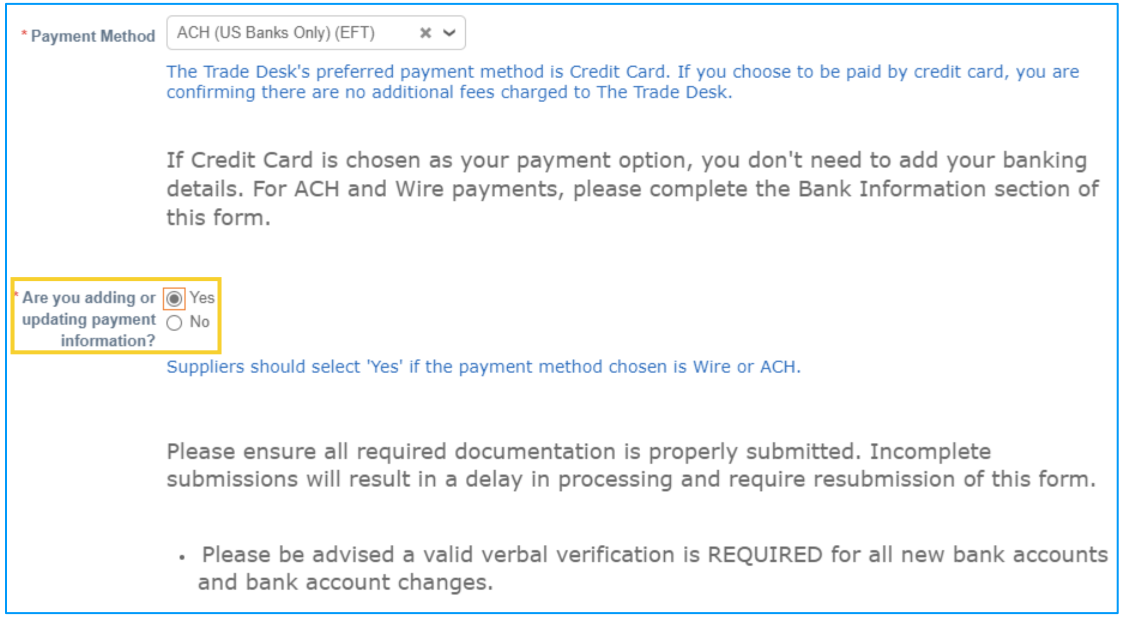


The Trade Desk's default preferred payment method is Credit Card.

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.

SUPPLIER ONBOARDING GUIDE

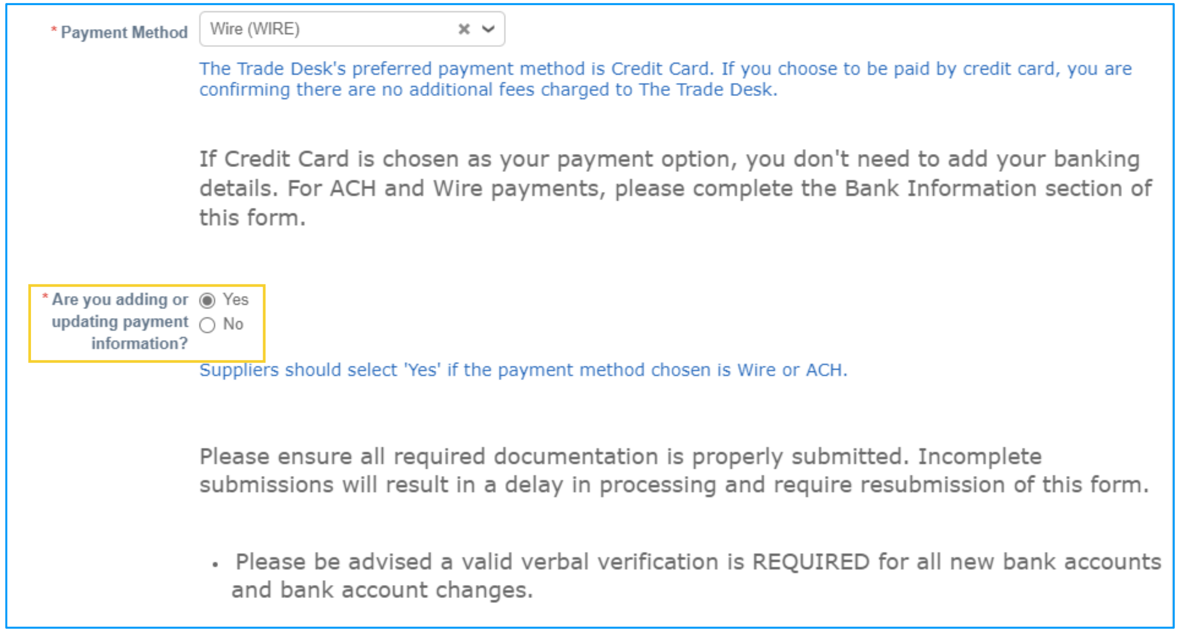
Payment Method – ACH - Requirements

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.

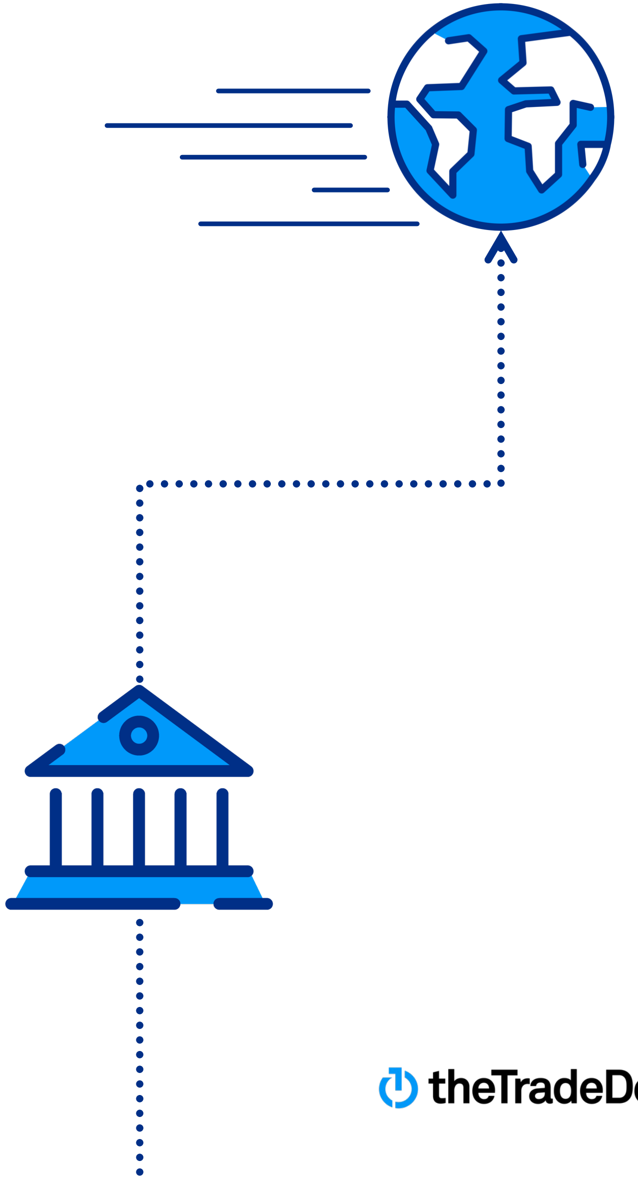
Suppliers utilizing **Australia Banks**, please add your BSB Number.

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– Wire

If your bank is located outside the US, select **Non-US Based Bank Account.**

Some countries require specific banking requirements. Please complete all necessary banking information.

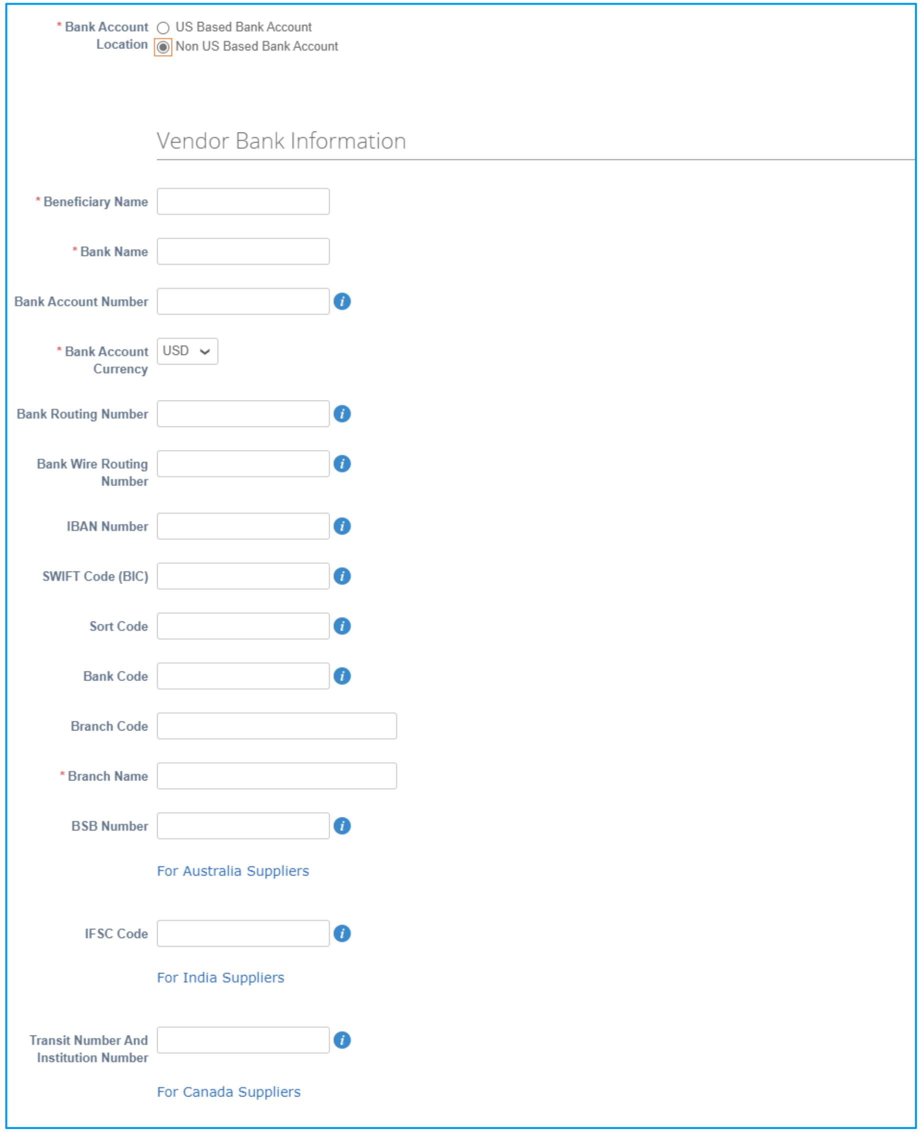
If your invoice is in another currency than your bank account currency, please contact Accounts Payable.

Branch Name is required for all international banks.

BSB Number is required for Australia Suppliers.

IFSC Code is required for India Suppliers.

Transit Number and Institution Number is required for Canada Suppliers.



* 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: USD

Bank Routing Number

Bank Wire Routing Number

IBAN Number

SWIFT Code (BIC)

Sort Code

Bank Code

Branch Code

* Branch Name

BSB Number

For Australia Suppliers

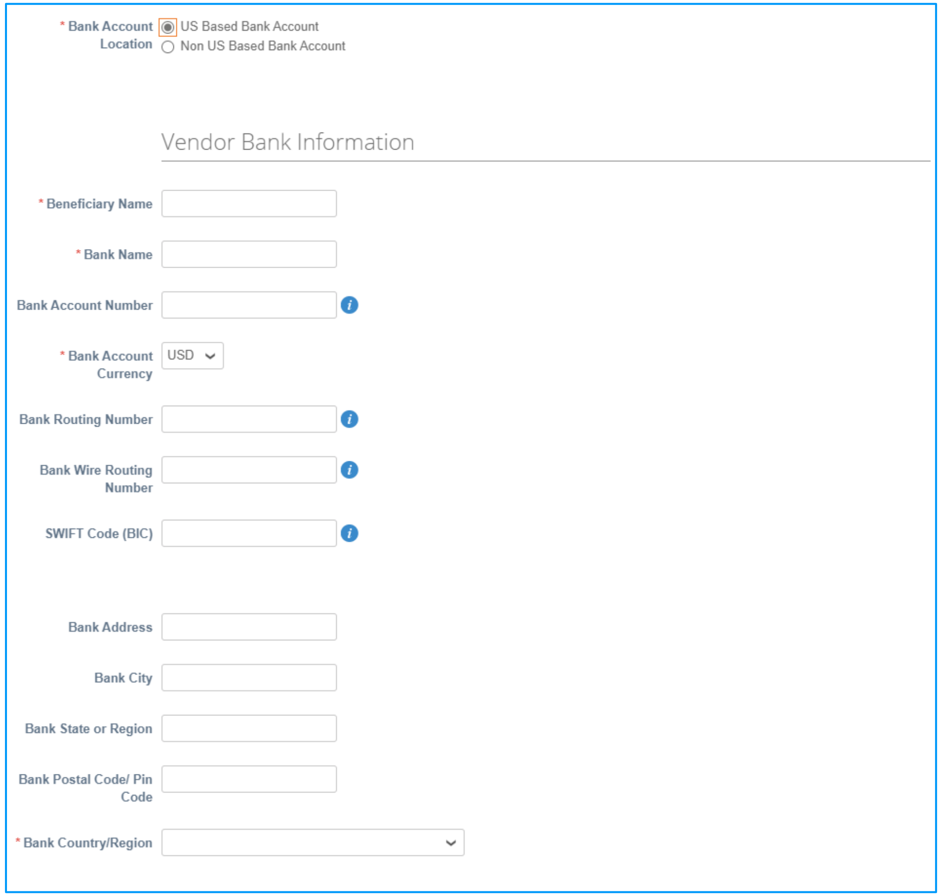
IFSC Code

For India Suppliers

Transit Number And Institution Number

For Canada Suppliers

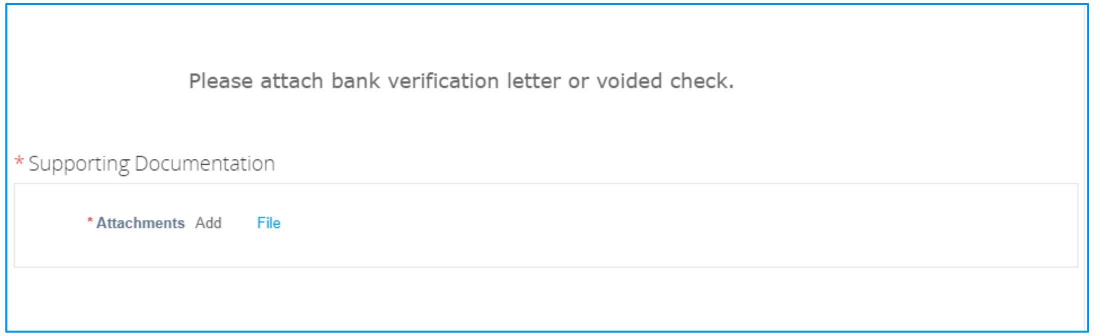
Payment Method – Adding Banking Details

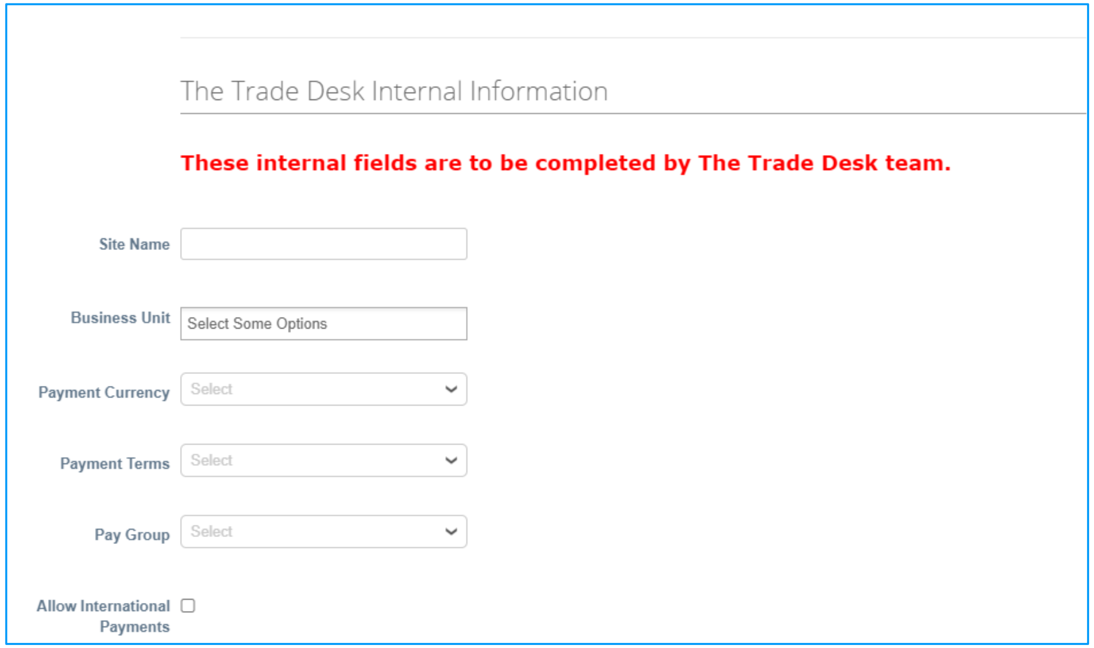


For **ACH** and **Wire**, adding your banking details follows a similar process. Please be sure to refer to the requirements listed in previous slides for each payment method.

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





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.

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

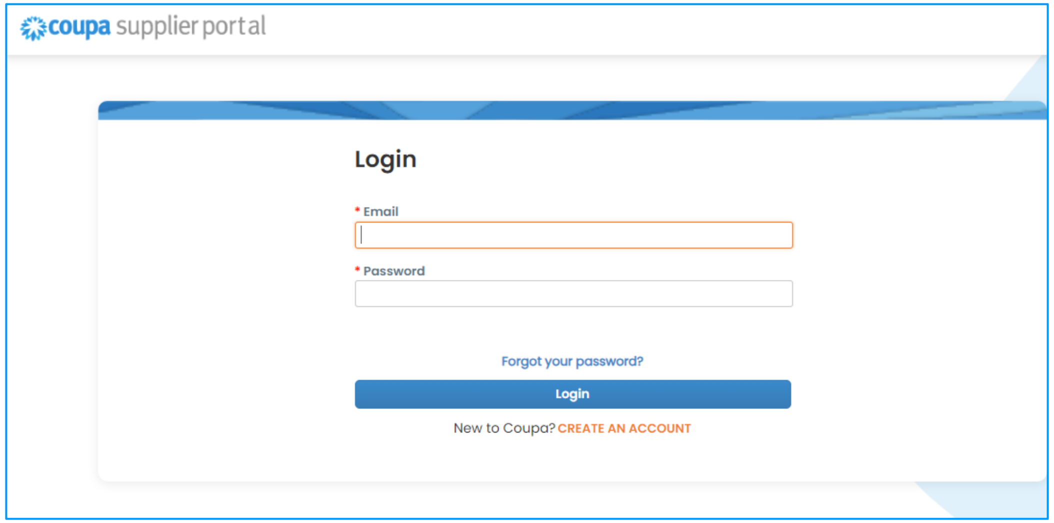
With cybercrime on the rise, The Trade Desk takes every precaution to ensure valid information is received. A **verbal banking verification is required** for every bank addition and/or bank changes on a supplier record before a payment can be made. The Trade Desk will contact your company independently 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.

06 Coupa Supplier Portal (CSP) Overview

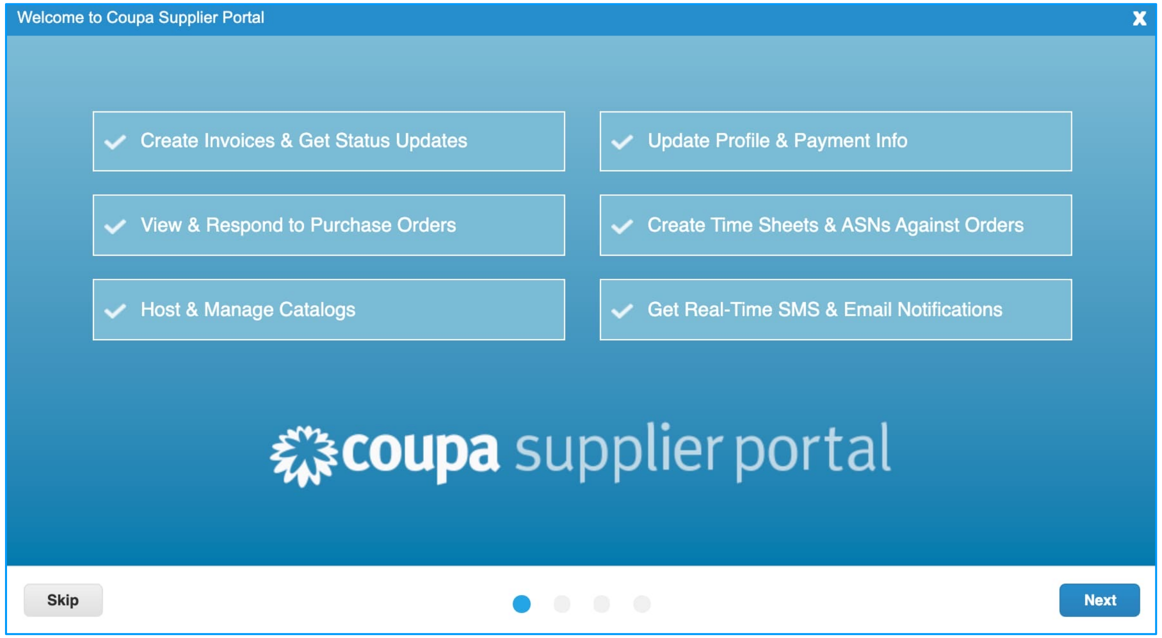
Logging In



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

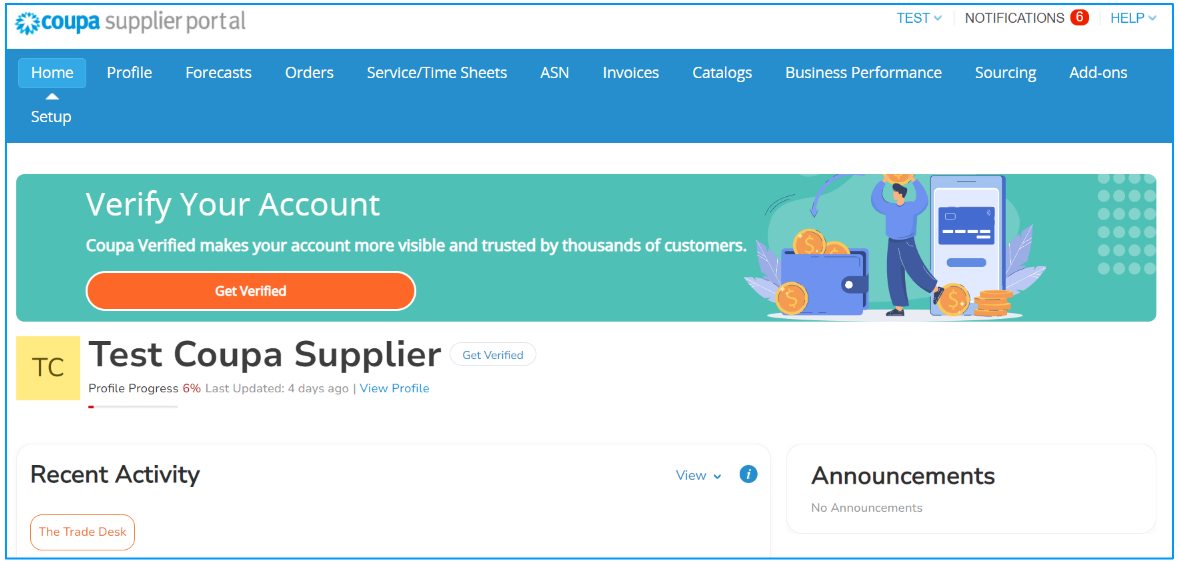
*If you forgot your password, click on “Forgot Your Password?” and Coupa will send an autogenerated email to you. If you did not receive the email, check your Spam/Junk Folder.

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.

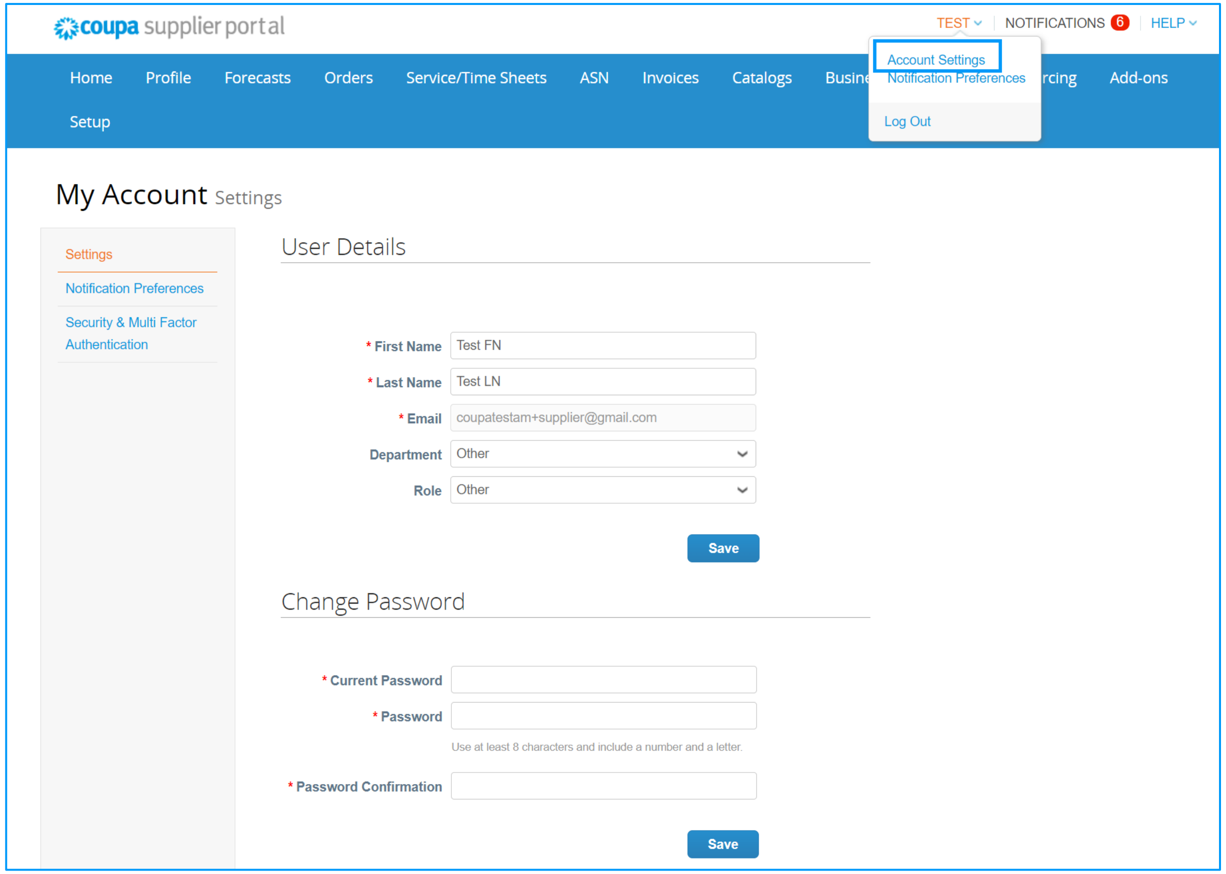
Coupa Homepage



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.

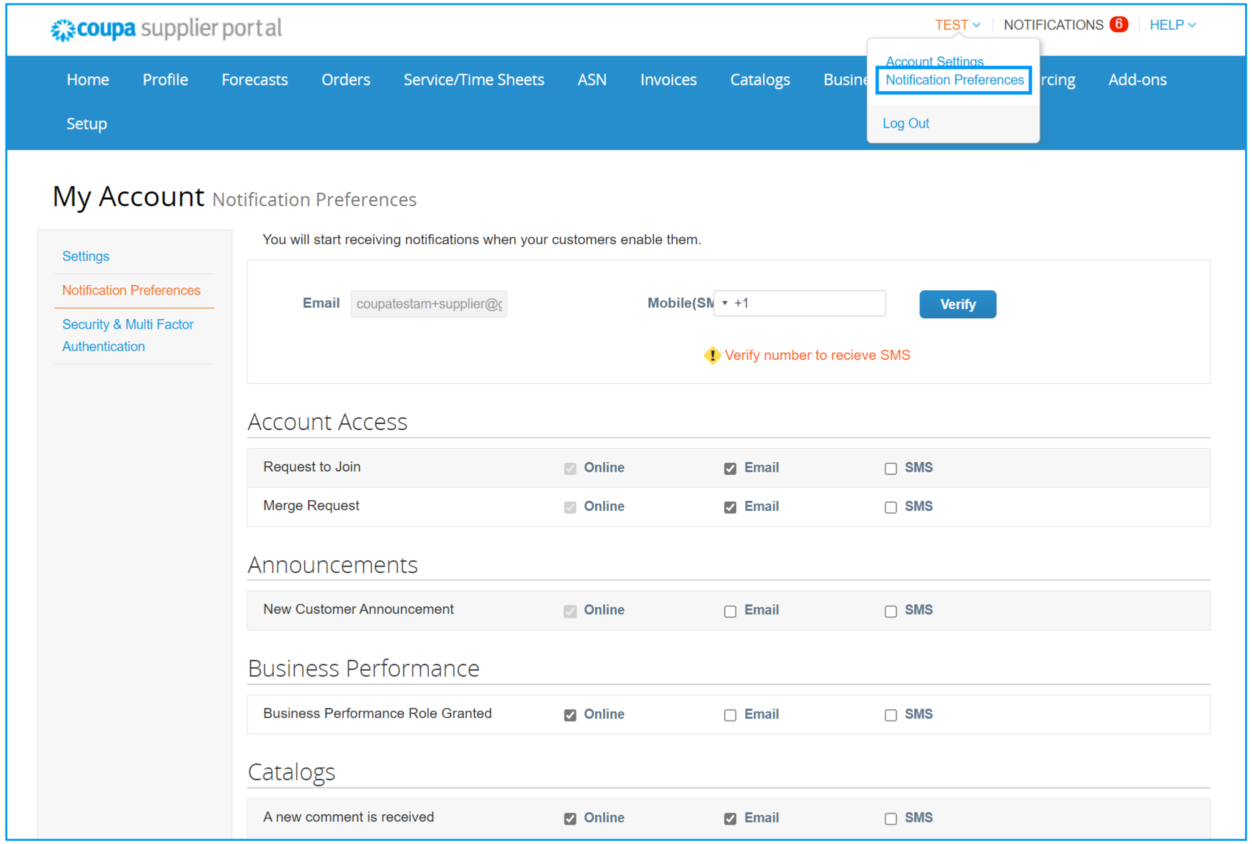
Account Settings



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

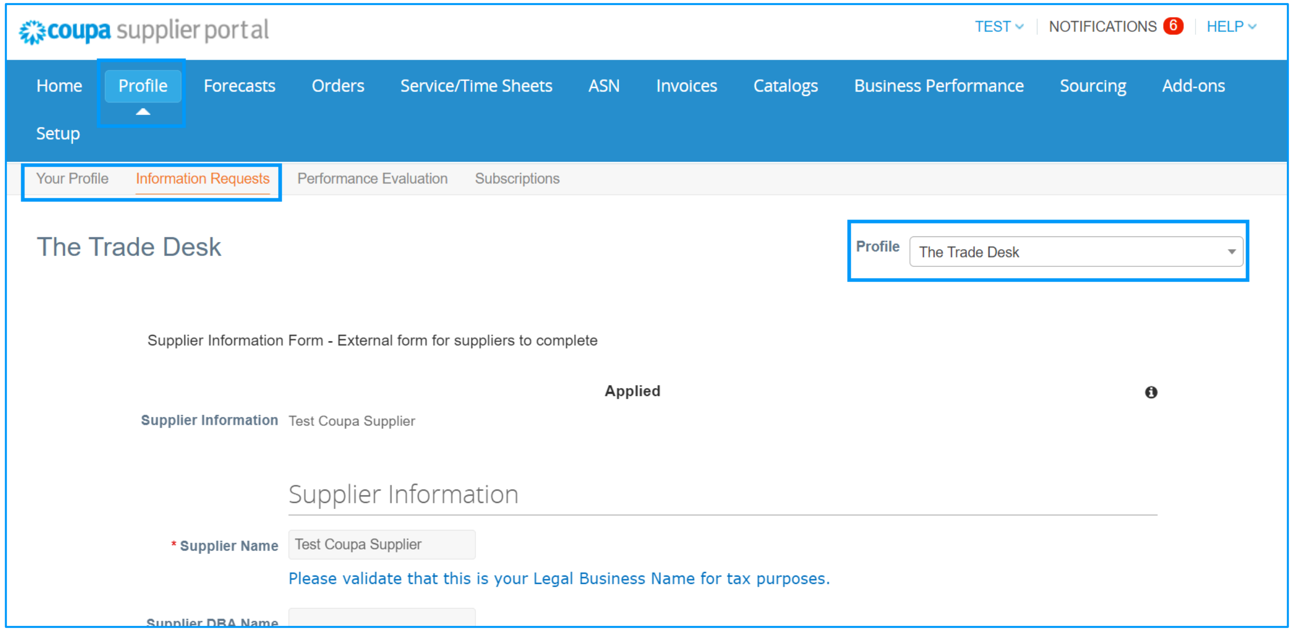
Here, you can also personalize your notification preferences and enable or disable multi-factor authentication.

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



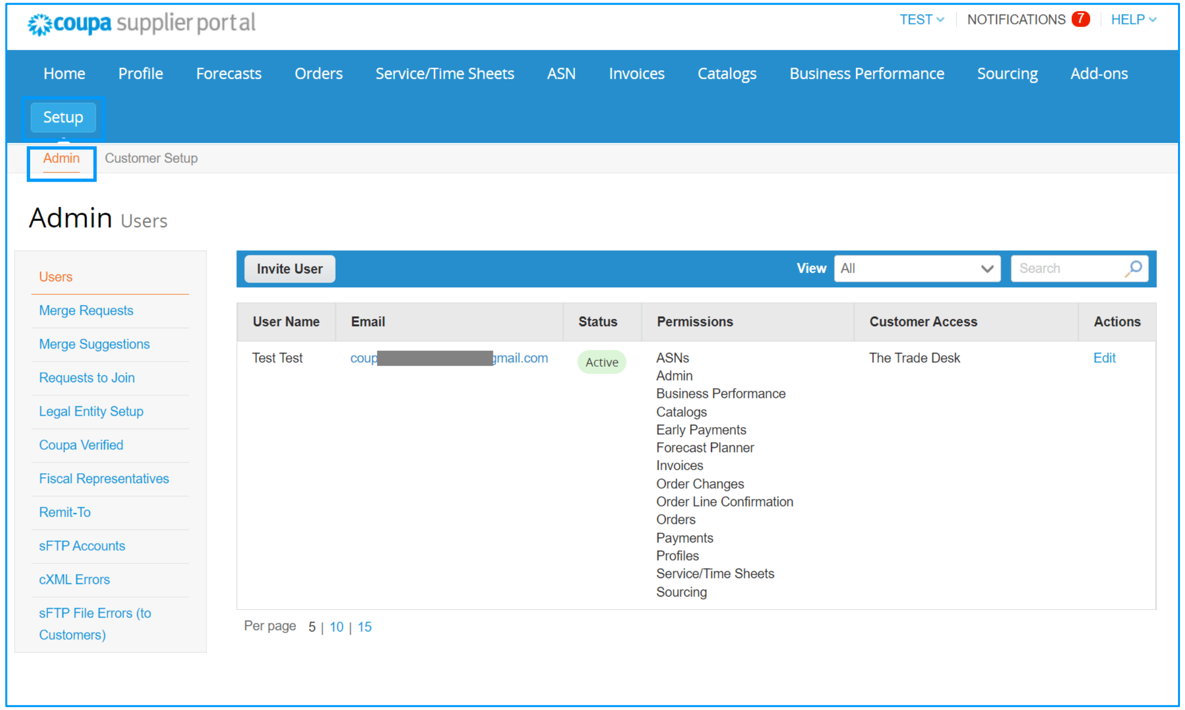
Your Profile will not update or send information to The Trade Desk.

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.

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.

07 Additional Resources

ADDITIONAL RESOURCES

Next Steps

Congratulations on successfully onboarding as a supplier with The Trade Desk! Your inclusion in our supplier database marks an important step in our partnership.

We invite you to visit our Supplier Resources webpage, where you'll discover resources designed to assist you in understanding and managing the Procure-to-Pay process with The Trade Desk, located within the sections for **Current Supplier**, **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 a successful collaboration together!

theTradeDesk

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.