



 theTradeDesk®

NEW SUPPLIER ONBOARDING GUIDE

Table of Contents

- 1 [The Trade Desk – Benefits of Coupa Supplier Portal](#)
- 2 [Invitation to Join The Trade Desk’s Supplier Database](#)
- 3 [Creating an Account with Coupa for the First Time](#)
- 4 [The Trade Desk Onboarding Process](#)

01

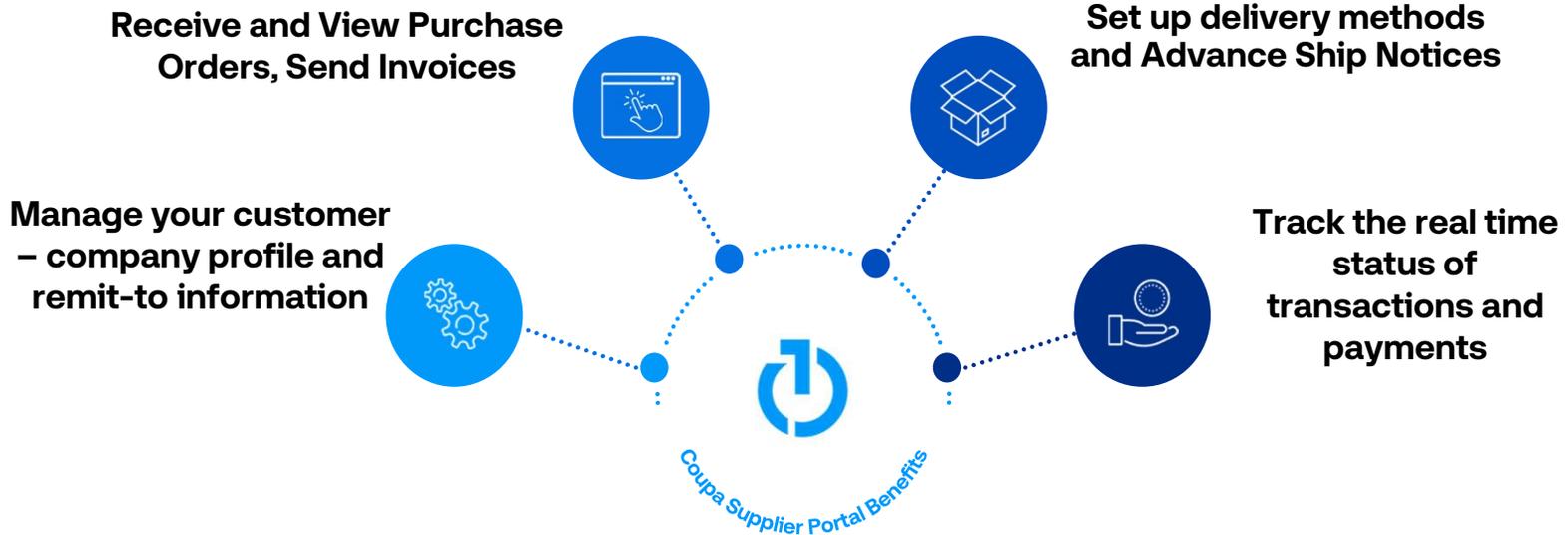
Benefits of Coupa Supplier Portal (CSP)

Joining The Trade Desk's Supplier Management Platform

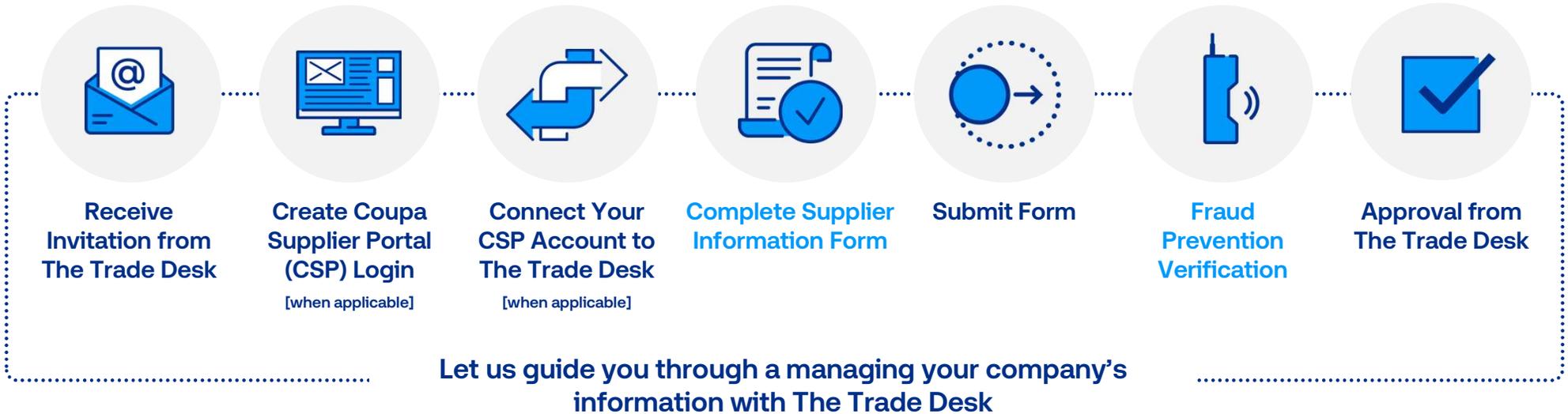
The Trade Desk uses the **Coupa Supplier Portal (CSP)** to collect and manage supplier information. This guide provides instructions for creating your account. While **joining the CSP is optional**, using the CSP helps avoid duplicate form submissions if there are discrepancies or if The Trade Desk needs more information to process your payments.

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



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), please ensure the email you received the information request invitation is the same email connected to your account.
- Please reach out to your buyer or accounts payable to receive an invitation. [Invitations to the CSP and to complete the onboard form 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

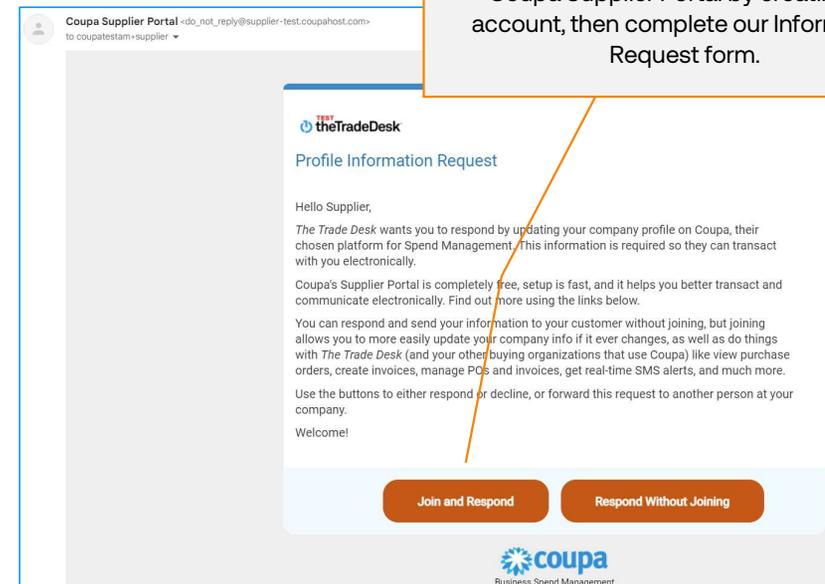
If you are not a current user of Coupa Supplier Portal and need to set up an account to provide updated account information to The Trade Desk, please select [Join and Respond](#).

Keep in mind, after you set up your CSP account, **you will need to complete a form specifically created by The Trade Desk to capture your information** in the format we need to process payments. Again, this process should be completed after you create your CSP account.

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. If you select this option, the form will automatically open for you to complete. Please visit our helpful guide for **Managing your Supplier Information with The Trade Desk** from our [Global Supplier Resource Website](#).

Select on **Join and Respond** to join the Coupa Supplier Portal by creating an account, then complete our Information Request form.



Coupa Supplier Portal – Join and Respond

The screenshot shows the 'Create an Account' page on the Coupa Supplier Portal. The page has a blue header with the Coupa logo and 'supplier portal' text. Below the header, there is a 'Create an Account' section with a brief introduction: '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 includes several fields: 'Business Name' (Sample Supplier), 'Email' (Sample.Supplier@test.com), 'First Name' (Sample) and 'Last Name' (Supplier), 'Password' and 'Confirm Password' (with a note: 'Use at least 8 characters and include a number and a letter.'), 'Country/Region' (dropdown) and 'Tax Registration' (with a note: 'I do not have a Tax ID'). At the bottom, there is a checkbox for 'I accept the Privacy Policy and the Terms of Use', a blue 'Create an Account' button, and a link for 'Already have an account? LOG IN'. A 'Forward this to someone' link is also present at the bottom.

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.

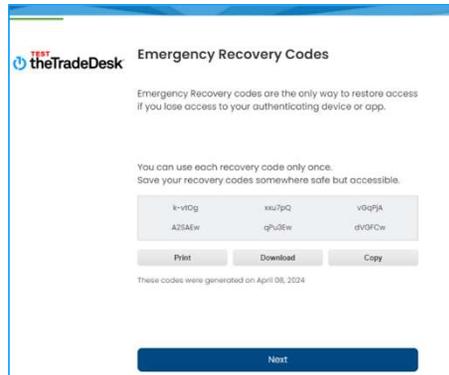
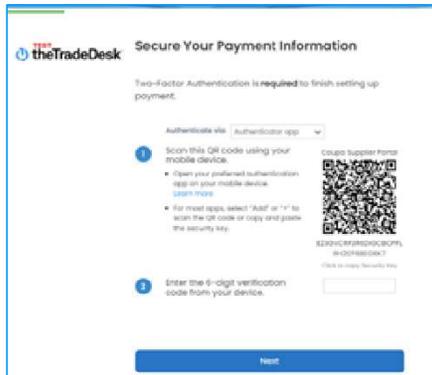
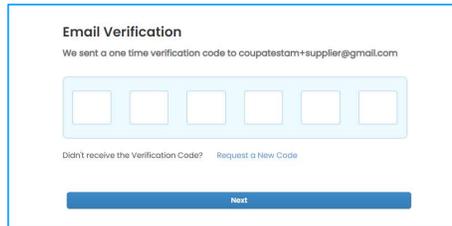
Important: Due to a recent Coupa Upgrade, Coupa will request you provide your company information with a Pop-Up titled “Tell us about your business.” It is our recommendation you **exit the Pop-Up and navigate to The Trade Desk’s Supplier Information Management Form** to avoid errors or delays in the onboarding process.

To navigate to the onboarding form, click “**Profile**,” then “**Your Customer Profiles**”

Thank you for your patience as we work to resolve these issues with Coupa. If you need additional onboarding support, please contact purchasing@thetradedesk.com

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**” at the bottom of the screen. You will need to enter an email address with the same domain.

Coupa Supplier Portal – Join and Respond



Important: When creating your account, you will need to set up **Multi-Factor Authentication (MFA)**. After setting it up, you will receive **six recovery codes**. These codes are essential for regaining access if you lose your MFA device. **Please be sure to save these codes somewhere secure.**

Once you have created your login, you may 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 Supplier Portal – Join and Respond

The screenshot shows the 'Coupa Supplier Portal Onboarding' form for a 'Sample Supplier'. The form is titled 'Coupa Supplier Portal Onboarding' and includes the instruction: 'Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal'. There are two tabs: 'Account Details' (selected) and 'Payment Information'. The 'Primary Address' section contains the following fields:

Primary Address		
* Country/Region	* Address Line 1	Address Line 2
<input type="text"/>	42 N. Chestnut St.	<input type="text"/>
* City	* State	* Postal Code
Ventura	CA	93001

A blue 'Next' button is located at the bottom right of the form.

You will then be asked to supply your information for The Coupa Supplier Portal.

Once this section is complete, you will need to continue to fill out The Trade Desk's Supplier Information Request form.

Coupa Supplier Portal – Join and Respond

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

✔ Primary Address saved successfully

Account Details Payment Information

Virtual Card ⓘ Customer Supported

Please enter the following information to receive Virtual Card payments.

* Payment Method Name ⓘ * Email Address

Do not accept Virtual Card payments from this customer

Next

Important: In the **Coupa Supplier Portal Onboarding** section we recommend clicking **Do not accept Virtual Card Payments from this customer**.

Important: In the **Coupa Supplier Portal Onboarding** section, we recommend providing your virtual card email here. Please keep in mind The Trade Desk will not incur any additional fees when paying by credit card. The amount on the invoice, is what will be paid.

Remember you will still need to fill out **duplicate information** in a form specifically created by The Trade Desk to capture your information in the format we need to process payments. The form can be found in your **Profile** under **Information Requests**.

Coupa Supplier Portal – Join and Respond

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details Payment Information

Bank Transfer Customer Supported

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

* Bank Account Country/Region * State * Bank Account Currency

United States United States USD

Beneficiary Name Bank Name

Account Number ⓘ Confirm Account Number

ACH Routing Number ⓘ Wire Routing Number ⓘ

My company expects to receive urgent/wire payments

Branch Code Bank Account Type

Business

Email Address ⓘ Remit-To Code ⓘ

Supporting Documents ⓘ

Drop or Browse Files

Browse

Do not accept Bank Transfer payments from this customer

Important: In the **Coupa Supplier Portal Onboarding** section, we recommend filling out all your bank details to help expedite filling out The Trade Desk Information Application Form.

If you complete the section and select **Next**, you will be completing information to set up your CSP account which **does not** provide banking information to The Trade Desk.

The Trade Desk Application Information Form will need to be completed and approved so we may transact with your company.

The form can be found in your **Profile** under **Information Requests**.

Coupa Supplier Portal – Join and Respond

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details Payment Information

Check Customer Supported

Please enter the following information to receive Check payments.

* Payment Method Name ⓘ

Country/Region

United States ▼

* Street 1

Street 2

+ Street 3

* City

* State

* Zip Code

Remit-To Code ⓘ

Do not accept Check payments from this customer

Important: In the **Coupa Supplier Portal Onboarding** section, we recommend filling out all your bank details to help expedite filling out The Trade Desk Information Application Form. The Trade Desk **does not** support Check Payments.

Coupa Supplier Portal – Join and Respond

Subscriptions

Registered	Most Popular Coupa Verified	Coupa Advanced
<p>Easily do business with customers who use Coupa</p> <p>Free</p> <p>Registered user includes:</p> <ul style="list-style-type: none">• Business Profile• Orders• E-Invoices• Catalogs• Payments• Sourcing Events <p>Continue</p>	<p>Amplify your trusted brand across Coupa's community of buyers</p> <p>\$549 / year</p> <p>Everything in 'Registered' plus:</p> <ul style="list-style-type: none">• Verified Badge• Priority Search Rank <p>←</p>	<p>Optimize your cash flow and increase productivity throughout your day</p> <p>\$4,800 / year</p> <p>Everything in 'Registered' plus:</p> <ul style="list-style-type: none">• Automated invoice reminders and reporting• A seamless integration with your account system <p>Continue</p>

Coupa is free to use, and we recommend registering for free to manage your account information.

04

The Trade Desk Onboarding Process

Steps to Complete the Onboard Process

Now that you have completed setting up your Coupa Supplier Portal, for The Trade Desk to transact with you, please locate our [Information Request form](#) using our guide in the next page.



Create your CSP Account

Joined and completed your Coupa Supplier Portal Account. (Not required to onboard with The Trade Desk)



Complete The Trade Desk Information Request Form

Navigate to the Information Requests section in your profile to complete the form needed for The Trade Desk to transact with you.



Verbal Verification and Confirmation of Onboarding

After completing the form, our Accounts Payable team will conduct a verbal verification to confirm your banking information. Once they have confirmed you will receive a notification that you are now an onboarded supplier!

Locating the Information Management Form

If you're joining the CSP for the first time, you'll be automatically directed to complete The Trade Desk's Supplier Onboard form **after** setting up your CSP account. If you leave and return later, you can find the request in multiple locations.

When you open the form, some details will be pre-filled, but you can make corrections as needed. You'll be guided to enter the necessary information to ensure smooth payment processing.

For resources on completing the form, please visit our helpful guide for [Managing your Supplier Information with The Trade Desk](#) from our [Global Supplier Resource Website](#).

