theTradeDesk®

CURRENT SUPPLIER
Purchase Order Resources

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Purchase Orders
Benefits of Coupa Supplier Portal

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Purchase Order Management Tool

The Trade Desk utilizes the Coupa Supplier Portal (CSP) for gathering and handling supplier information as well as Purchase Order and Invoice management.

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

If you need assistance in setting up your CSP account or want to provide us with your CSP account email for us to link, please reach out to your contact at The Trade Desk for support.

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02
Manage Purchase Orders in Coupa Supplier Portal (CSP)

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Manage Purchase Orders in CSP

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

Read The Trade Desk instructions.

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

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

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

- Create (flip the PO into) an invoice

- Create a credit note

- Create (flip the PO into) an advance ship notice (ASN)

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Manage Purchase Orders in CSP

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

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Purchase Orders in CSP – Shipping and Tracking

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.

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03
Advance Ship Notice (ASN)

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Advance Ship Notice

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

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

Save for later or submit.

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Advance Ship Notice

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

Save for later or submit.

Navigate to ASN tab to edit or cancel ASN.

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04
Purchase Order Status Glossary

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.

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05

Supplier Actionable Notification (SAN)

Supplier Actionable Notification (SAN)

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.

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