

 theTradeDesk®

CURRENT SUPPLIER

Purchase Order Resources



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01

Purchase Orders

Benefits of Coupa Supplier Portal

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.

02

Manage Purchase Orders in Coupa Supplier Portal (CSP)

PURCHASE ORDER RESOURCES

Manage Purchase Orders in CSP

The screenshot shows the Coupa Supplier Portal interface. The top navigation bar includes 'Home', 'Profile', 'Forecasts', 'Orders' (highlighted with a blue box), 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', and 'Add-ons'. Below this is a 'Setup' section with 'Orders' (highlighted with a blue box) and other options like 'Order Lines', 'Returns', etc. A 'Select Customer' dropdown menu is set to 'The Trade Desk' (highlighted with a blue box). The main content area is titled 'Purchase Orders' and includes 'Instructions From Customer' and 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		  
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 RESOURCES

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.

Purchase Orders in CSP – Shipping and Tracking

Purchase Order # PO000017

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

03

Advance Ship Notice (ASN)

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

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

1	Description	Quantity	UOM	Received Quantity	Status
	Consultant	<input type="text" value="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

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

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

Save for later or submit.

ADVANCE SHIP NOTICE (ASN)

Advance Ship Notice

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
1 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:

Cancel Save Submit

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.

Advance Ship Notices

Export to: View: All Search:

ASN Number	Status	Delivery Date	Last Updated By	Last Updated Date	Actions
ASN-PO00020	Pending Receipt	03/28/22	CrossCountry Consulting	03/20/22	

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.

05

Supplier Actionable Notification (SAN)

PURCHASE ORDER RESOURCES

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.

