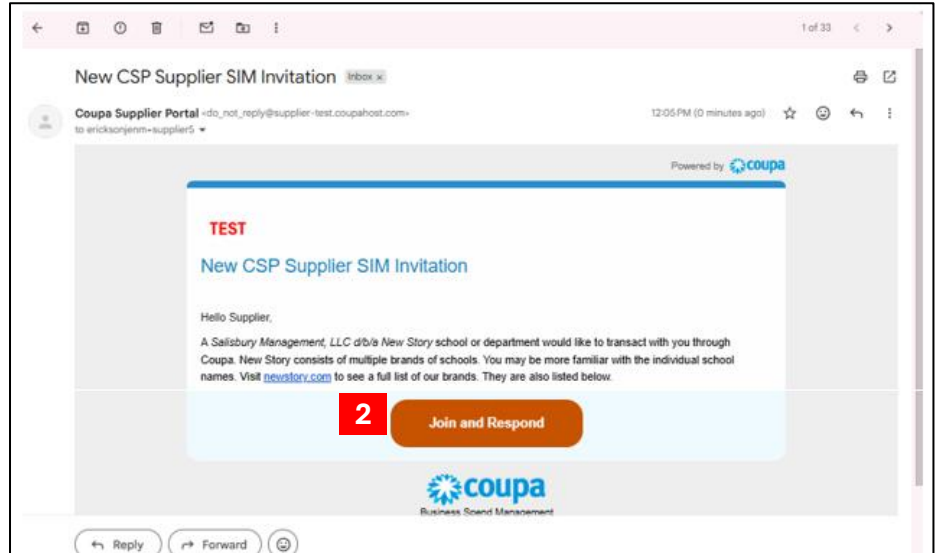


## SUPPLIER ONBOARDING – EXTERNAL GUIDE

Guide for suppliers onboarding through the Coupa Supplier Portal (CSP).

1. Open the email with subject *New CSP Supplier SIM Invitation*
2. Click Join and Respond



3. If you have an existing CSP account, click Log in and jump forward to step 5 (page 4)
4. If you do not have an existing CSP account:
  - a. Complete required fields
  - b. Click Create an account

The screenshot shows the 'Create an account' page on the Coupa Supplier Portal. The page includes the following text: 'Create an account', 'New Story uses Coupa to transact and communicate with you. If you can't provide this info, please send it to the right person who manages accounts.', 'Forward this to someone', and a form with the following fields: 'Business Name' (Shakey McShakerson), 'Email' (ericksonjenm+supplier5@gmail.com), 'First Name' (Valued), 'Last Name' (Supplier), 'Password' (.....), 'Confirm Password' (.....), 'Country/Region' (United States), and 'Tax ID' (123456789). A red box with '4a' is overlaid on the Business Name field. A red box with '4b' is overlaid on the 'Create an account' button. A red box with '3' is overlaid on the 'Log In' link.

- c. Complete required fields for your Primary Address
- d. Click Save and Next

### Onboarding for newstory-test (Coupa Supplier Portal)

Fill out the required fields so your customer can pay you.

1 Primary Address

Provide the main address associated with your business.

2 Payment Methods

(Virtual Card | Bank Transfer | Remit-To Address)

**4c** Primary Address

\* Country/Region

United States ▾

\* Address Line 1

Sesame Seed Court ✕

Address Line 2

Address Line 2 ⊕

\* City

Germantown

\* State

Maryland ▾

\* Postal Code

20874

**United States**

Invoice From Code ⓘ

Preferred Language

English (US) ▾

**4d** Save and Next

- e. Click Do not accept Virtual Card payments from New Story (we do not transaction with virtual cards at this time)
- f. Click Save and Next

### Onboarding for newstory-test (Coupa Supplier Portal)

Fill out the required fields so your customer can pay you.

✔ Primary Address saved successfully
✕

✔ Primary Address

Provide the main address associated with your business.

2 Payment Methods

(Virtual Card | Bank Transfer | Remit-To Address)

Virtual Card ⓘ

Please enter the following information to receive Virtual Card payments.

Account Nickname \* ⓘ

Email Address \*

Process credit cards automatically

**4e**  Do not accept Virtual Card payments from New Story

**4f** Save and Next

- g. To receive payment via **ACH** preferred method), complete required Bank Transfer fields
- h. To receive payment via **check**, click Do not accept Bank Transfer payments from New Story
- i. Click Save and Next

For ACH payments, New Story only accepts either a copy of a voided check or a letter noting account information on **BANK letterhead**. Bank Statements will not be accepted.

### Onboarding for newstory-test (Coupa Supplier Portal)

Fill out the required fields so your customer can pay you.

✓ **Primary Address**  
Provide the main address associated with your business.

2 **Payment Methods**  
(Virtual Card | Bank Transfer | Remit-To Address)

#### Bank Transfer

Please enter the following information to receive Bank Transfer payments.

<p style="font-size: x-small; margin-bottom: 5px;">Account Nickname * ⓘ</p> <input style="width: 95%; border: 1px solid #ccc;" type="text"/>	<p style="font-size: x-small; margin-bottom: 5px;">Beneficiary Legal Name * ⓘ</p> <input style="width: 95%; border: 1px solid #ccc;" type="text"/>
<p style="font-size: x-small; margin-bottom: 5px;">Bank Branch Country / Region *</p> <div style="border: 1px solid #ccc; padding: 2px;">United States</div>	<p style="font-size: x-small; margin-bottom: 5px;">Bank Account Currency *</p> <div style="border: 1px solid #ccc; padding: 2px;">USD</div>
<p style="font-size: x-small; margin-bottom: 5px;">Bank Branch State / Province</p> <div style="border: 1px solid #ccc; padding: 2px;"> </div>	<p style="font-size: x-small; margin-bottom: 5px;">Bank Name *</p> <input style="width: 95%; border: 1px solid #ccc;" type="text"/>
<p style="font-size: x-small; margin-bottom: 5px;">Account Number</p> <div style="border: 1px solid #ccc; padding: 2px;">4-17 digits</div>	<p style="font-size: x-small; margin-bottom: 5px;">ACH Routing Number</p> <div style="border: 1px solid #ccc; padding: 2px;">9 digits</div>
<p style="font-size: x-small; margin-bottom: 5px;">Wire Routing Number ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px;">9 digits</div>	<p style="font-size: x-small; margin-bottom: 5px;">SWIFT / BIC Code ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px;">8 or 11 characters</div>

#### Additional Information

<p style="font-size: x-small; margin-bottom: 5px;">Remittance Email ⓘ</p> <input style="width: 95%; border: 1px solid #ccc;" type="text"/>	<p style="font-size: x-small; margin-bottom: 5px;">Remit-To Code ⓘ</p> <input style="width: 95%; border: 1px solid #ccc;" type="text"/>
<p style="font-size: x-small; margin-bottom: 5px;">Supporting Documents ⓘ</p> <div style="border: 1px dashed #ccc; padding: 10px; text-align: center;"> <p style="font-size: x-small; margin: 0;">Drop or Browse Files</p> <div style="border: 1px solid #ccc; padding: 2px 10px; display: inline-block;">Browse</div> </div>	

4h  Do not accept Bank Transfer payments from New Story

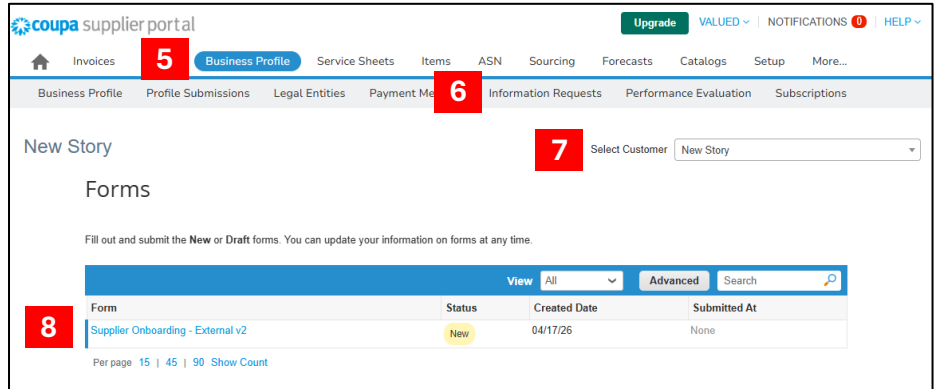
4i Save and Next

- j. For the free CSP account, click Continue in the Registered option

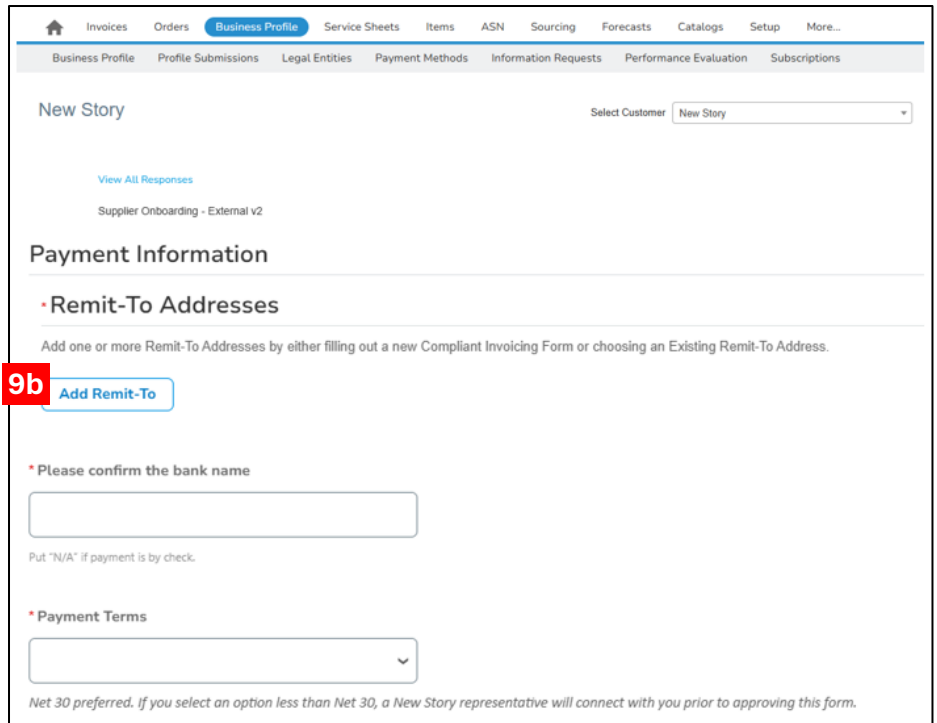
### Subscriptions

<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <h4 style="margin-top: 0;">Registered</h4> <p style="font-size: x-small; margin-bottom: 5px;">Easily do business with customers who use Coupa</p> <p style="margin-bottom: 5px;"><b>Free</b></p> <p style="font-size: x-small; margin-bottom: 5px;">Registered user includes:</p> <ul style="list-style-type: none"> <li>Business Profile</li> <li>Orders</li> <li>E-Invoices</li> <li>Catalogs</li> <li>Payments</li> <li>Sourcing Events</li> </ul> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 10px;"> <span style="background-color: red; color: white; padding: 2px 5px; font-weight: bold;">4j</span> <input style="width: 80%; border: 1px solid #ccc;" type="button" value="Continue"/> </div> </div>	<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <div style="text-align: center; background-color: #f4a460; color: white; padding: 2px 5px; font-weight: bold; font-size: x-small; margin-bottom: 5px;">Most Popular</div> <h4 style="margin-top: 0;">Coupa Verified</h4> <p style="font-size: x-small; margin-bottom: 5px;">Amplify your trusted brand across Coupa's community of buyers</p> <p style="margin-bottom: 5px;"><b>\$549 / year</b></p> <p style="font-size: x-small; margin-bottom: 5px;">Everything in 'Registered' plus:</p> <ul style="list-style-type: none"> <li>Verified Badge</li> <li>Priority Search Rank</li> </ul> <div style="display: flex; justify-content: center; align-items: center; margin-top: 10px;"> <input style="width: 80%; border: 1px solid #007bff; background-color: #007bff; color: white;" type="button" value="Purchase Verified"/> </div> </div>	<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <h4 style="margin-top: 0;">Coupa Advanced</h4> <p style="font-size: x-small; margin-bottom: 5px;">Optimize your cash flow and increase productivity throughout your day</p> <p style="margin-bottom: 5px;"><b>\$4,800 / year</b></p> <p style="font-size: x-small; margin-bottom: 5px;">Everything in 'Registered' plus:</p> <ul style="list-style-type: none"> <li>Automated invoice reminders and reporting</li> <li>A seamless integration with your account system</li> </ul> <div style="display: flex; justify-content: center; align-items: center; margin-top: 10px;"> <input style="width: 80%; border: 1px solid #ccc;" type="button" value="Purchase Advanced"/> </div> </div>
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5. From the homepage, click Business Profile
6. Click Information Requests
7. In the Select Customer field, select New Story
8. Under Forms, click Supplier Onboarding – External



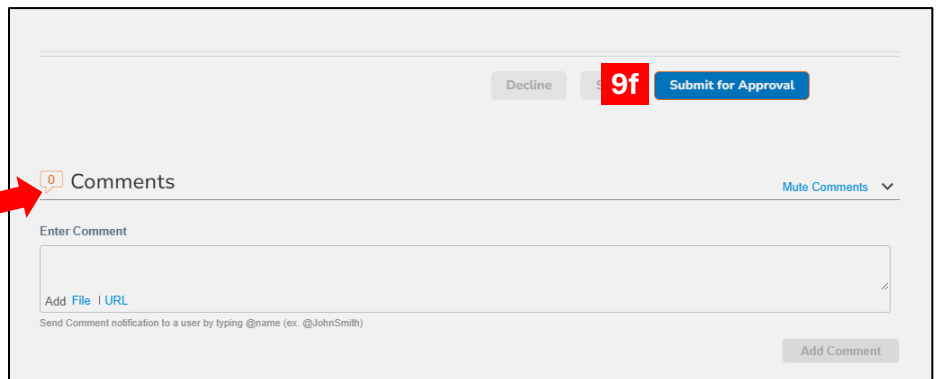
9. Fill out the form
  - a. Complete required fields
  - b. In the Payment Information section, click Add Remit-To
  - c. Select an address
  - d. Click Add Selected
  - e. Continue filling out form



**Notes:**

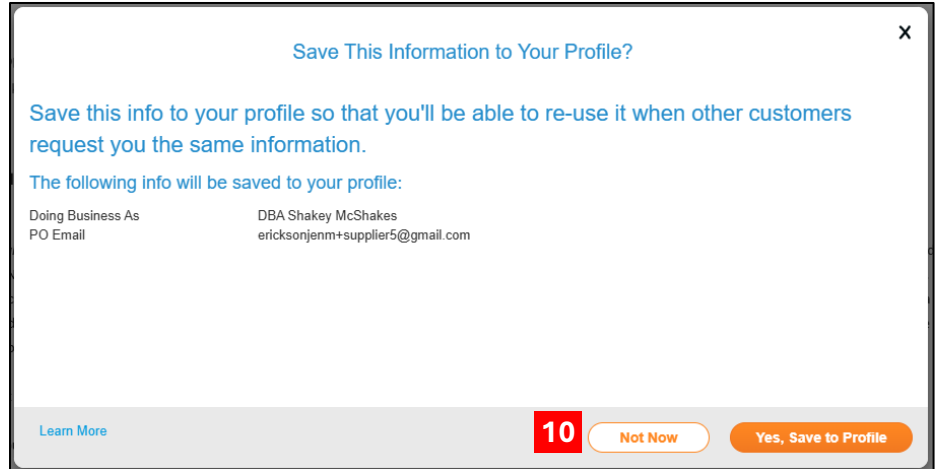
- ACH attachment must be either a copy of a voided check or a letter noting account information on **BANK letterhead**; Bank statements will not be accepted
- W-9 attachment must be fully completed, including signature and **dated within the past year**

- f. When finished filling out the form, click Submit for Approval



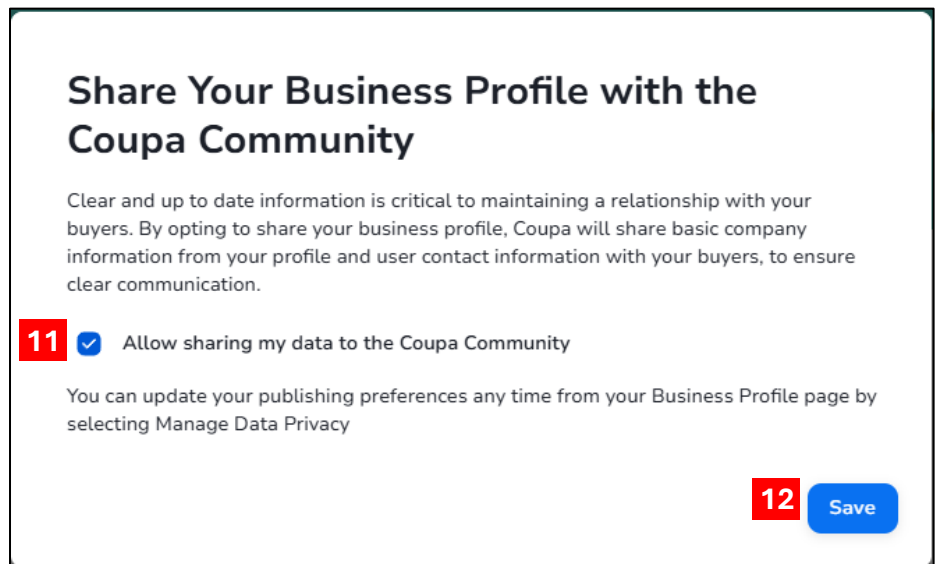
New Story will use the Comments section to communicate if changes are needed to the form; You will receive email notification of comments made to you

10. Select an option based on your preference



11. Select or deselect *Allow sharing my data to the Coupa Community* based on your preference

12. Click Save



New Story will be notified of the completion of your form and will finish the onboarding process.

We encourage you to transact with us through your CSP account to view PO's and send invoices. If you will not use the CSP to send invoices, email PDF invoices to [invoices@newstory.com](mailto:invoices@newstory.com). Invoices must reference a Coupa issued PO # to be paid timely. Contact the New Story employee requesting goods or services from you to receive a Coupa issued PO #.

Visit <https://info.newstory.com/coupa-for-vendors> to access FAQ's, guides, and links for CSP assistance.