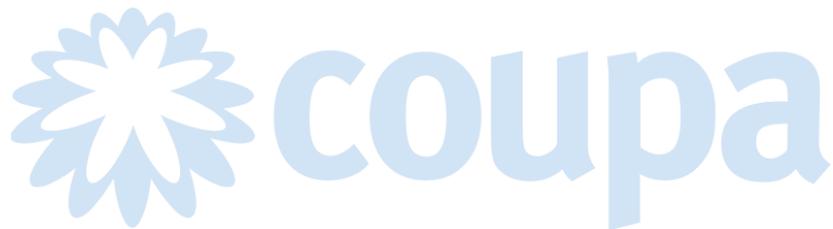


# New Story's Coupa Supplier Onboarding Guide



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Hello Valued Supplier,

Thank you for taking the time to set up your supplier account within our P2P platform Coupa and manage all future transactions digitally. The Coupa Supplier Portal (CSP) will provide real-time access to your PO, invoice, and payment details and statuses. Communication within PO and invoice digital documents will also be available to help timely processing of each transaction.

**Please find a step-by-step guide below to make your onboarding process easier.**

**If any assistance is required during the process or it has taken more than 30 minutes to submit the information request form, please contact the procurement team at [procurement@newstory.com](mailto:procurement@newstory.com).**

## I. Onboarding Steps Summary

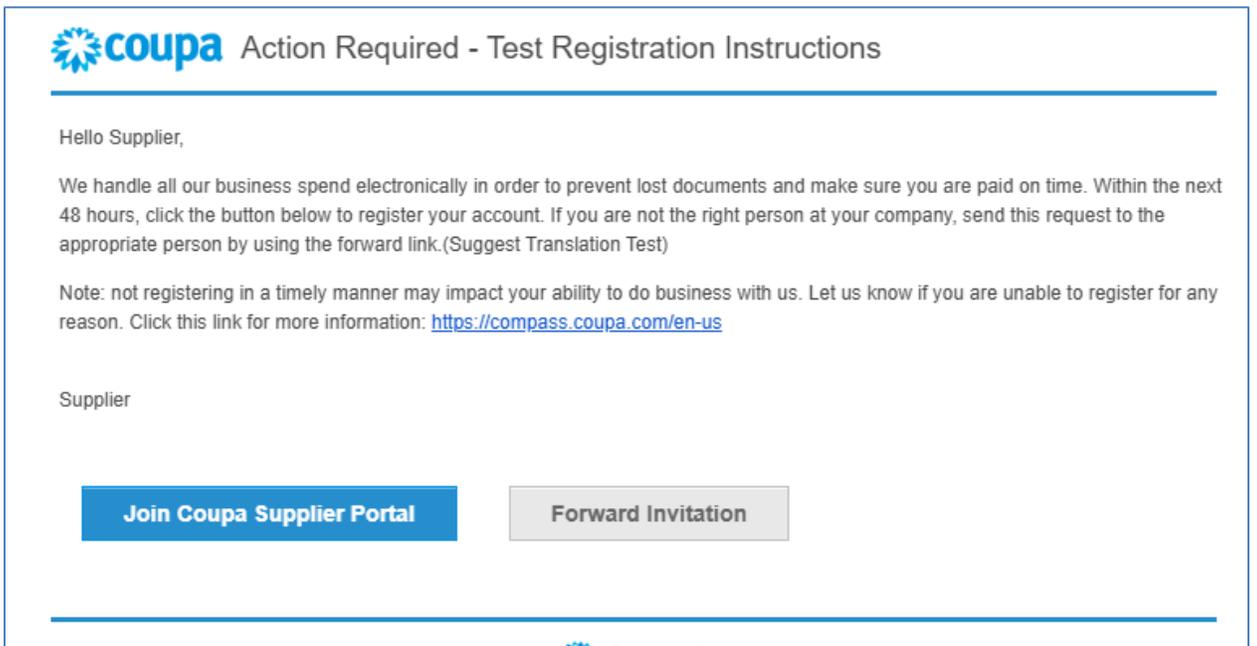
- 1. Invitation:** Accept the invitation to the Coupa Supplier Portal (CSP) by selecting the **Join & Respond** button within the email.
- 2. Account Setup:** If your company is new to the Coupa Supplier Portal, a business profile will need to be created. If your company already has an active account, it will automatically be linked. It is also important to set up your 'Multi-Factor Authentication (MFA)' for security purposes.
- 3. Creation of Legal Entity and Remittance:** Within the account creation windows, it is essential to ensure your Legal Entity and Payment Method are set up which are created automatically once all prompted fields are completed within the initial set up windows. If not completed during initial account setup, follow the respective guided sections below.

## II. Step-by-Step Onboarding Instructions

### A. Invitation

When joining New Story's supplier portal in Coupa, an invitation and request for information will be sent to the primary contact on file. If a message like the ones below was not received, the email on file may need to be updated with the customer.

**New to Coupa:** select the **Join Coupa Supplier Button** button within the invitation to create your supplier portal account. Alternatively, you can forward the invite to another team member using the **Forward Invitation** button.



The screenshot shows an email from Coupa with the subject "Action Required - Test Registration Instructions". The email content includes a greeting "Hello Supplier," followed by a paragraph explaining that business spend is handled electronically and that registration is required within 48 hours. It provides a note about the importance of timely registration and a link to <https://compass.coupa.com/en-us> for more information. At the bottom, there are two buttons: "Join Coupa Supplier Portal" (highlighted in blue) and "Forward Invitation" (grey).

**Account already active:** once New Story has sent an invitation to an active email user within your profile, the two accounts will automatically link. Continue to login. ***The account creation steps below can be skipped.***

You are Connected to **Recor Medical, Inc.** on Coupa

Powered by 

Hello Supplier,

**Recor Medical, Inc.** 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 **Recor Medical, Inc.** (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!

[Log In](#)

## B. Joining the Coupa Supplier Portal

When setting up the account for the first time, the prompt will ask for contact information and continue through the steps of creating your company business profile.



A shared email alias can be used to log in if individual logins are not required or preferred. Once the account has been created, additional users can be added under Setup.

### Create an Account

**Recor Medical, Inc.** is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with **Recor Medical, Inc.** so you're ready to do business together.

\* Business Name  
  
Your legal business name (or legal personal name if an individual)

\* Email

\* First Name  \* Last Name

\* Password  \* Confirm Password   
Use at least 8 characters and include a number and a letter.

\* Country/Region  \* Tax Registration  (i)

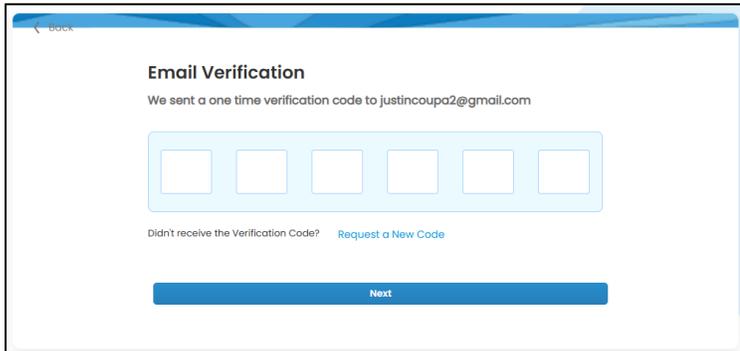
I do not have a Tax ID

I accept the [Privacy Policy](#) and the [Terms of Use](#)

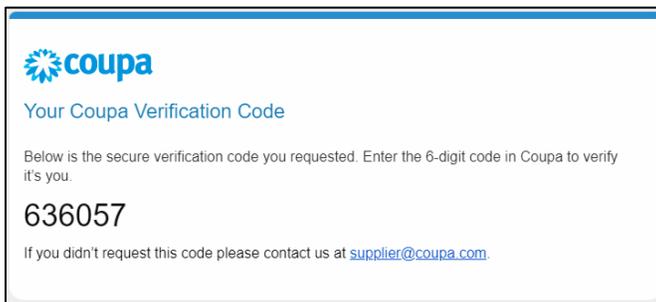
[Create an Account](#)

Already have an account? [LOG IN](#)

After clicking the Create an Account button, an email verification page is displayed, and a one-time-password is sent to your email. Enter the code. Then click 'Next' to complete your account creation.

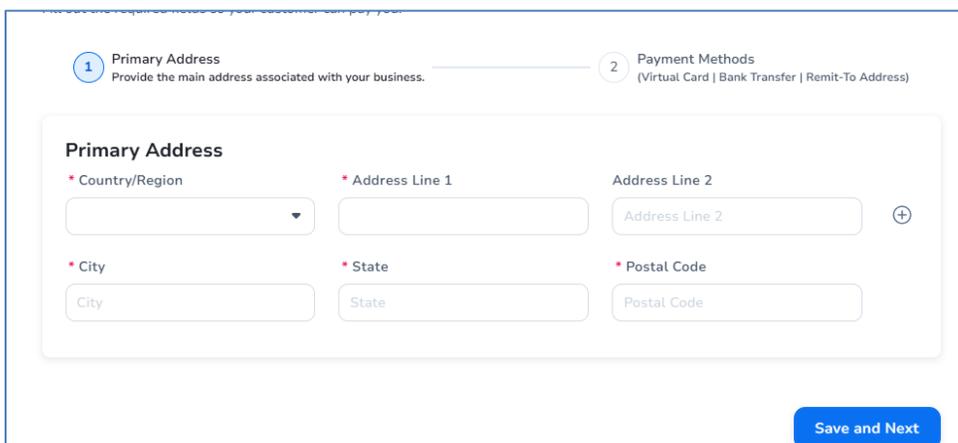


The screenshot shows an "Email Verification" page. At the top left, there is a "back" link. The main heading is "Email Verification". Below it, a message states: "We sent a one time verification code to justincoupa2@gmail.com". In the center, there is a light blue box containing six empty square input fields for a 6-digit code. Below the input fields, there is a link: "Didn't receive the Verification Code? Request a New Code". At the bottom center, there is a blue button labeled "Next".



The screenshot shows a page with the Coupa logo at the top left. Below the logo, the heading is "Your Coupa Verification Code". The text below reads: "Below is the secure verification code you requested. Enter the 6-digit code in Coupa to verify it's you." The code "636057" is displayed in a large font. At the bottom, there is a link: "If you didn't request this code please contact us at [supplier@coupa.com](mailto:supplier@coupa.com)".

Once verified, the proceeding windows will gather all pertinent information such as addresses, remittance, banking etc.



The screenshot shows a form titled "Primary Address" with a "Save and Next" button at the bottom right. At the top, there are two steps: "1 Primary Address" and "2 Payment Methods". The "Primary Address" section contains the following fields: "Country/Region" (a dropdown menu), "Address Line 1", "Address Line 2" (with a plus sign to add more lines), "City", "State", and "Postal Code". All fields are marked with an asterisk to indicate they are required.

### Bank Transfer

Please enter the following information to receive Bank Transfer payments.

Account Nickname * ⓘ	Beneficiary Legal Name * ⓘ
<input type="text"/>	<input type="text"/>
Bank Branch Country / Region *	Bank Account Currency *
<input type="text" value="United States"/>	<input type="text" value="USD"/>
Bank Branch State / Province *	Bank Name *
<input type="text"/>	<input type="text"/>
Account Number *	ACH Routing Number *
<input type="text" value="4-17 digits"/>	<input type="text" value="9 digits"/>
Wire Routing Number ⓘ	SWIFT / BIC Code ⓘ
<input type="text" value="9 digits"/>	<input type="text" value="8 or 11 characters"/>

Be sure to complete all applicable fields and it is recommended to create a banking profile in your remittance, as this is commonly requested and or required from customers to process digital payments.

Once you have finished populating your company information and banking details, you will be prompted to select a Coupa Supplier Portal subscription.

**The Free Version** is perfectly functional and recommended to select.

Great News! The payment information has been successfully shared with the following customers and has been validated: Test
✕

### Subscriptions

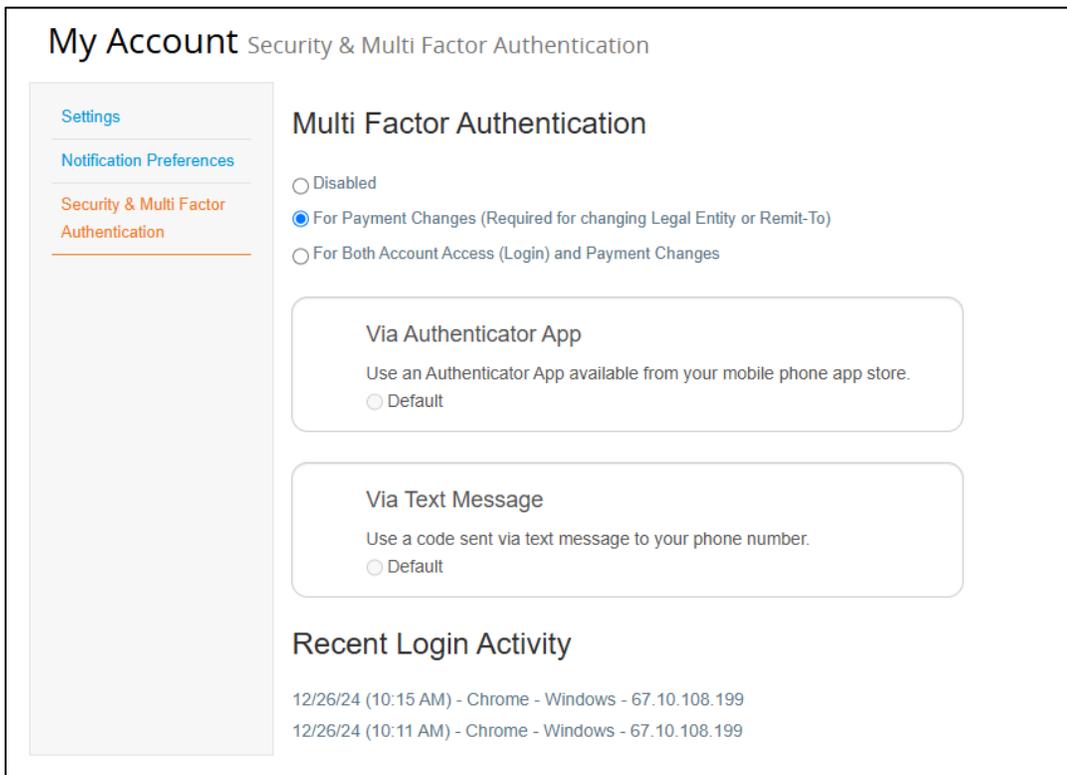
<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p><b>Registered</b></p> <p>Easily do business with customers who use Coupa</p> <p><b>Free</b></p> <p>Registered user includes:</p> <ul style="list-style-type: none"> <li>Business Profile</li> <li>Orders</li> <li>E-Invoices</li> <li>Catalogs</li> <li>Payments</li> <li>Sourcing Events</li> </ul> <p style="text-align: center; border: 1px solid #ccc; border-radius: 5px; width: 100px; margin: 10px auto;">Continue</p> </div>	<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p style="text-align: center; background-color: #f4a460; color: white; padding: 2px 5px; border-radius: 3px;">Most Popular</p> <p><b>Coupa Verified</b></p> <p>Amplify your trusted brand across Coupa's community of buyers</p> <p><b>\$549 / year</b></p> <p>Everything in 'Registered' plus:</p> <ul style="list-style-type: none"> <li>Verified Badge</li> <li>Priority Search Rank</li> </ul> <p style="text-align: center; border: 1px solid #ccc; border-radius: 5px; width: 100px; margin: 10px auto; background-color: #0070c0; color: white;">Purchase Verified</p> </div>	<div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p><b>Coupa Advanced</b></p> <p>Optimize your cash flow and increase productivity throughout your day</p> <p><b>\$4,800 / year</b></p> <p>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> <p style="text-align: center; border: 1px solid #ccc; border-radius: 5px; width: 100px; margin: 10px auto;">Purchase Advanced</p> </div>
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Cancel
Save and Next

## C. Setting up Multi Factor Authentication (MFA)

To protect your business's legal and financial information, the Coupa Supplier Portal requires the use of a multi factor authentication to ensure the person accessing the portal data is authorized to manage sensitive information. This can be configured with either the use of an **authentication app (mobile device or browser plugin)**, or **SMS texts**. If your company has a policy against using personal devices to authenticate, see the section **D** below for the steps to use a browser plugin for the Google authenticator app (**recommended**).

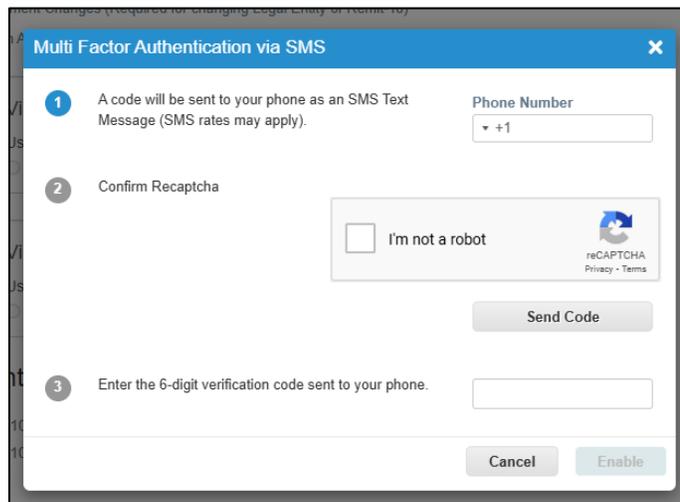
After CSP registration is complete, you will need to set up the **Security & Multi Factor Authentication** information. Navigate to **(Your Name)** in the upper right of your screen > **Account Settings** > **Security & Multi Factor Authentication**. Be sure to select the desired method of authentication within the drop down if you are choosing either to receive SMS texts or install an authenticator app on a personal device.



The screenshot shows the 'My Account' page with the 'Security & Multi Factor Authentication' section selected in the left-hand navigation menu. The main content area is titled 'Multi Factor Authentication' and features three radio button options: 'Disabled', 'For Payment Changes (Required for changing Legal Entity or Remit-To)', and 'For Both Account Access (Login) and Payment Changes'. The 'For Payment Changes' option is selected. Below these options are two rounded rectangular boxes. The first box, 'Via Authenticator App', includes the instruction 'Use an Authenticator App available from your mobile phone app store.' and a 'Default' radio button. The second box, 'Via Text Message', includes the instruction 'Use a code sent via text message to your phone number.' and a 'Default' radio button. At the bottom of the page, there is a 'Recent Login Activity' section with two entries: '12/26/24 (10:15 AM) - Chrome - Windows - 67.10.108.199' and '12/26/24 (10:11 AM) - Chrome - Windows - 67.10.108.199'.

**Setting up SMS(text) MFA:** follow the instructions below to setup the two-factor authentication.

1. Sign into your Coupa Supplier Portal account at **<https://supplier.couphost.com>**.
2. Navigate to your name at the top right of the window, click **Account Settings**.
3. In the lower left menu tabs, click **Security & Multi Factor Authentication**.
4. Select **Via Text Message** and validate your phone number, complete verification process to receive SMS notifications and verification codes via text/SMS.



Multi Factor Authentication via SMS

1 A code will be sent to your phone as an SMS Text Message (SMS rates may apply). Phone Number +1

2 Confirm Recaptcha

I'm not a robot reCAPTCHA Privacy - Terms

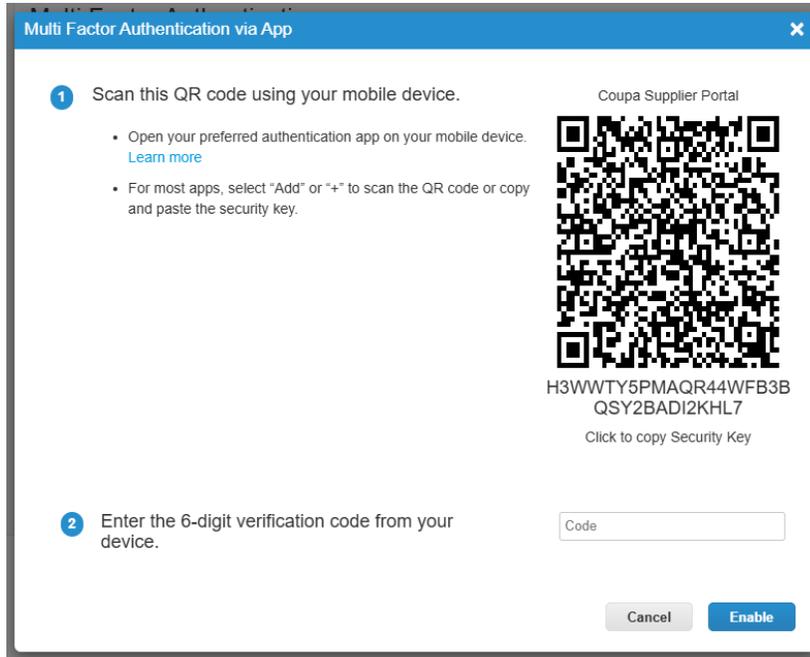
Send Code

3 Enter the 6-digit verification code sent to your phone.

Cancel Enable

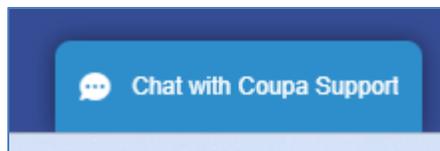
5. Once verified and the code has been entered, select **Enable**.

**Setting up authenticator app on a mobile device (browser plugin recommended instead, below in section D):** select **Via Authentication App** as the preferred method and scan the QR code prompt with the camera of your mobile device to connect to your desired authentication app. Complete the verification code and **Enable**.



Print your backup codes provided or email them to yourself before you click **OK**. If you ever lose your device, you need these to regain access to your CSP account.

**NOTE:** If you ever lose your device, you need the backup codes to regain access to your CSP account. If the backup codes are also lost, utilize the CSP website chat box (**located at the bottom of the screen**) to speak with a Coupa support rep.



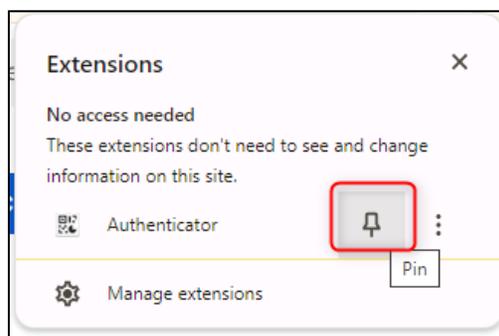
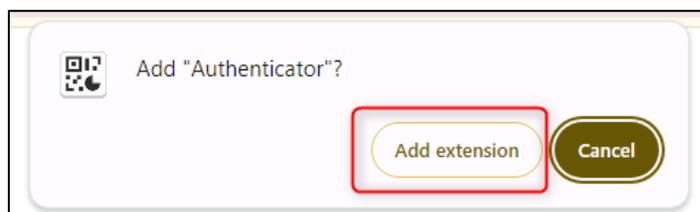
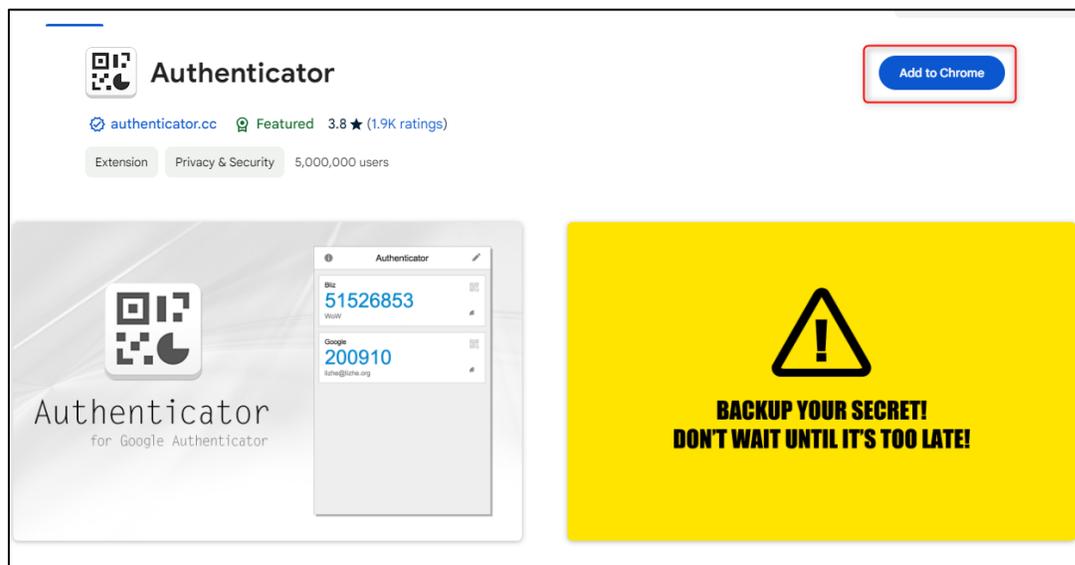
## D. Adding Google Authenticator Plugin to Browser

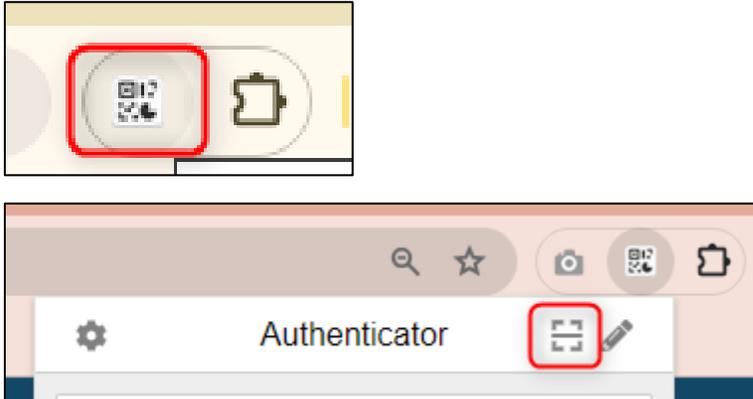
Download the Google Authenticator [extension](#) on your browser and follow the screenshots below to add your Coupa authenticator account to your internet browser. **Using Google Chrome is recommended for ease of access and avoiding the use of a personal device.**

**NOTE:** If an active user in the supplier portal has already installed the authenticator app to their personal device and additional supplier account users

want to add the browser plugin, the original user will need to disconnect the auth app connection within the portal. After being disconnected, they can reconnect and take a screenshot of the QR-code to send to all needed team members. Those users can then scan the QR-code in their browsers to connect to the same auth account.

**NOTE:** Since the scan needs to occur within the user's personal browser, an easy way to have the sent code moved into the browser, is sending it to a personal email and scanning from there. Other means could be to open the image in the browser directly.

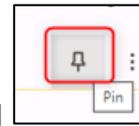




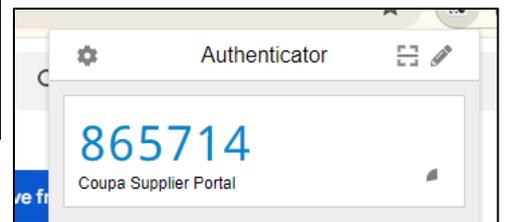
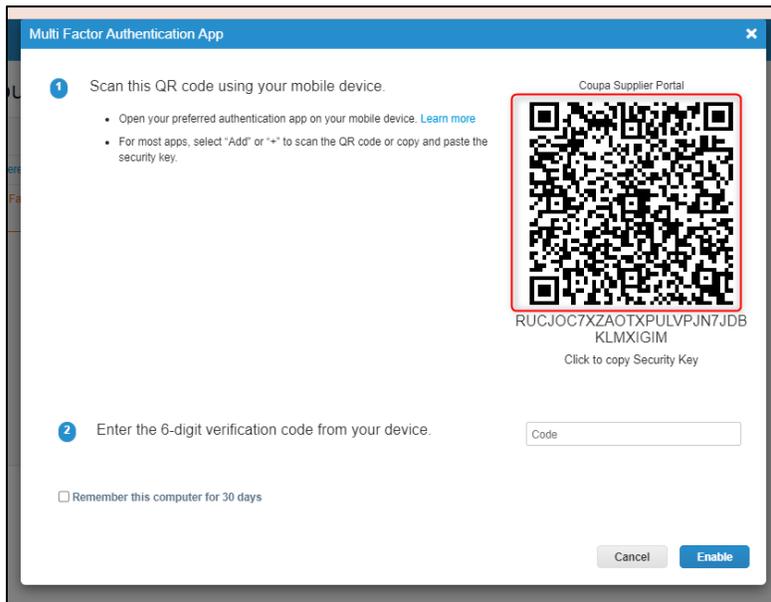
To utilize the Scan QR code function, ensure you have the **Coupa Multi Factor Authentication** window open as seen below to scan the provided QR code. **Scan**



the QR image with the authenticator plugin and when captured successfully, the authenticator plugin will activate as seen in the last image.

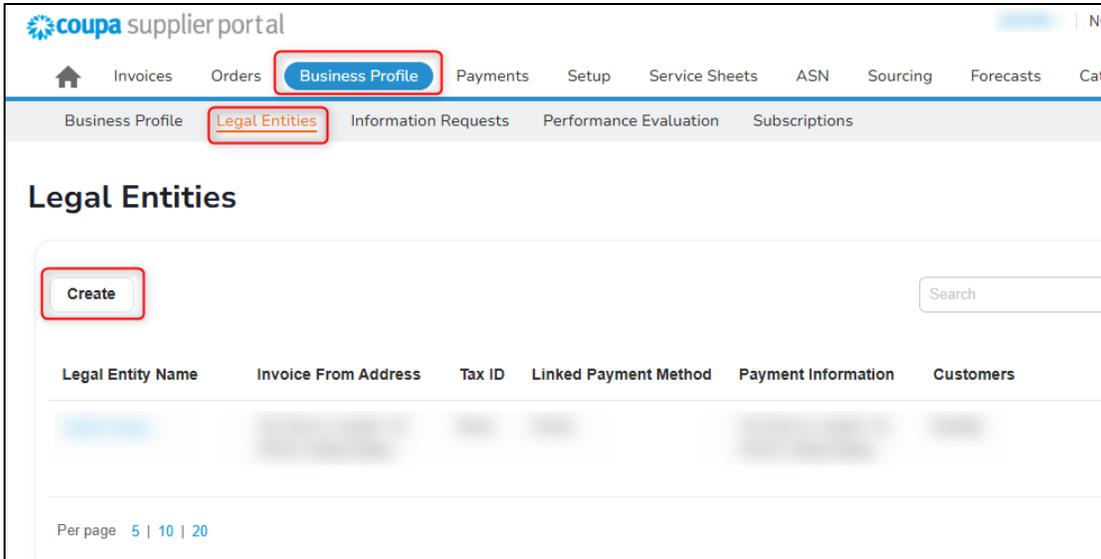


This plugin will always be available in the browser once pinned in the extensions section in the upper right corner of the browser.

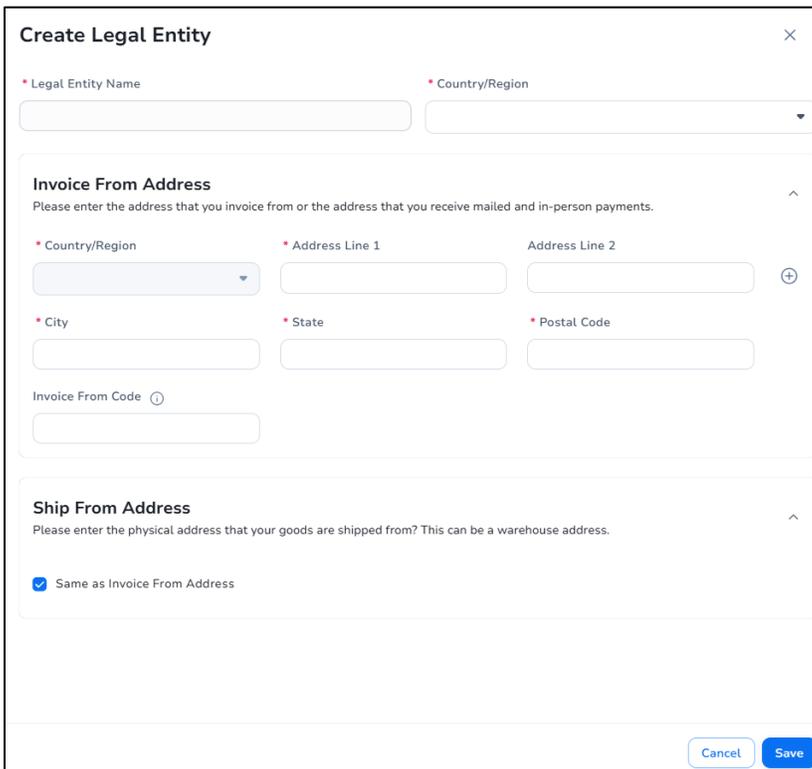


## E. Creating a Legal Entity

Upon initial creation of an account, the legal entity should have been automatically created. If an additional entity is needed to be set up, go to **Business Profile > Legal Entities > Create**. Follow the below screenshots below to complete the required profile details.

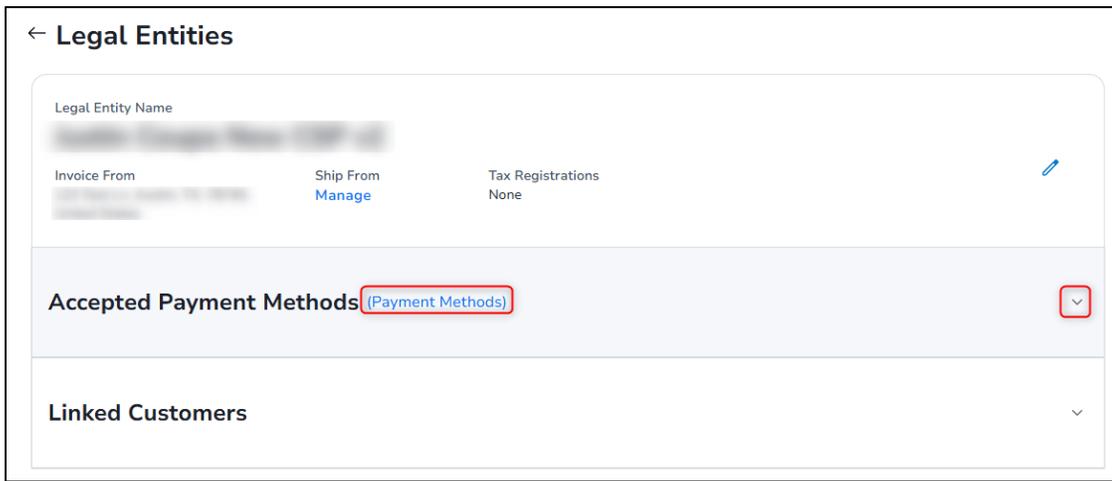


The screenshot shows the 'Legal Entities' page in the Coupa Supplier Portal. The navigation menu includes 'Business Profile' and 'Legal Entities', both highlighted with red boxes. A 'Create' button is also highlighted with a red box. Below the button is a table with columns: Legal Entity Name, Invoice From Address, Tax ID, Linked Payment Method, Payment Information, and Customers. A search bar is visible on the right side of the table.



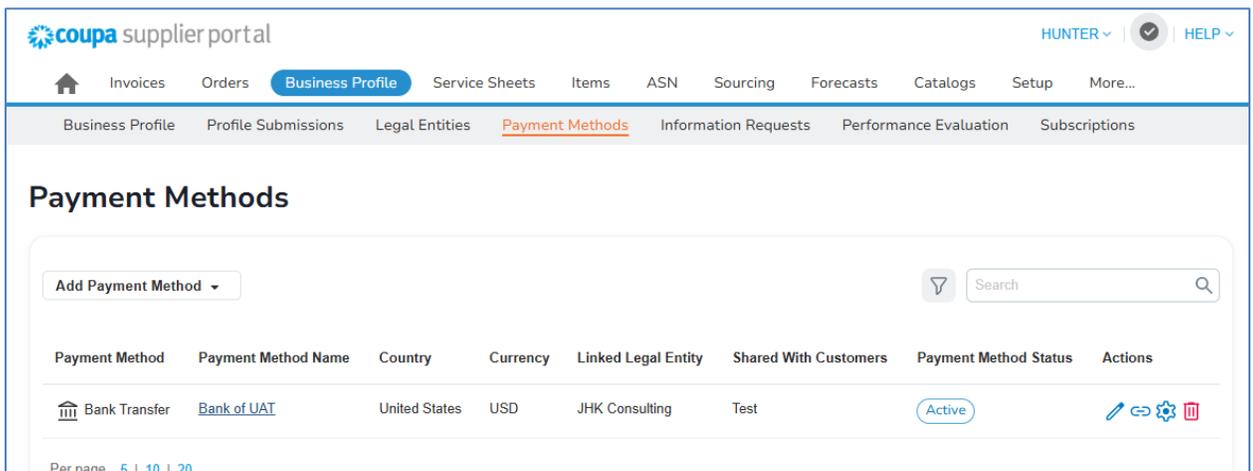
The screenshot shows the 'Create Legal Entity' form. The form includes fields for 'Legal Entity Name', 'Country/Region', 'Invoice From Address' (with sub-fields for Country/Region, Address Line 1, Address Line 2, City, State, and Postal Code), and 'Ship From Address' (with a checkbox for 'Same as Invoice From Address'). The 'Save' button is highlighted.

After the Legal Entity has been created, a **Payment Method** is required to be created for either address only or banking details (section **F** below).



## F. Creating a New Payment Method

Navigate to **Business Profile > Payment Methods > Add Payment Method** and follow the prompts for adding business and financial information. Ensure to select **Payment Type: Bank Transfer**, as this Remit-to type is the most used and required by customers.



Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
 Bank Transfer	<a href="#">Bank of UAT</a>	United States	USD	JHK Consulting	Test	Active	   

## Add Payment Method ✕

### Bank Transfer

Please enter the following information to receive Bank Transfer payments.

Account Nickname * ⓘ	Beneficiary Legal Name * ⓘ
<input type="text"/>	<input type="text"/>
Bank Branch Country / Region *	Bank Account Currency *
<input type="text" value="United States"/>	<input type="text" value="USD"/>
Bank Branch State / Province *	Bank Name *
<input type="text"/>	<input type="text"/>
Account Number *	ACH Routing Number *
<input type="text" value="4-17 digits"/>	<input type="text" value="9 digits"/>
Wire Routing Number ⓘ	SWIFT / BIC Code ⓘ
<input type="text" value="9 digits"/>	<input type="text" value="8 or 11 characters"/>

### Additional Information

Remittance Email ⓘ	Remit-To Code ⓘ
<input type="text"/>	<input type="text"/>

### Add Payment Method ✕

Great News! The payment information has been successfully saved. ✕

Select customers with whom you want to share Demo Acct and click Save.

Customer	Demo Acct
Select All	<input type="checkbox"/>
Test	<input type="checkbox"/>

Per page [5](#) | [10](#) | [20](#)

It is important to ensure all applicable customers are selected in the check boxes in the above window. Once all are selected, the necessary banking and remittance details are sent to the customer's instance who use Coupa Pay.

supplier portal
HUNTER ▼ | | HELP ▼

Home
Invoices
Orders
Business Profile
Service Sheets
Items
ASN
Sourcing
Forecasts
Catalogs
Setup
More...

Business Profile
Profile Submissions
Legal Entities
Payment Methods
Information Requests
Performance Evaluation
Subscriptions

### Payment Methods

Add Payment Method ▼

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
Bank Transfer	Demo Acct	United States	USD	JHK Consulting	Test	Active	
Bank Transfer	Bank of UAT	United States	USD	JHK Consulting	Test	Active	

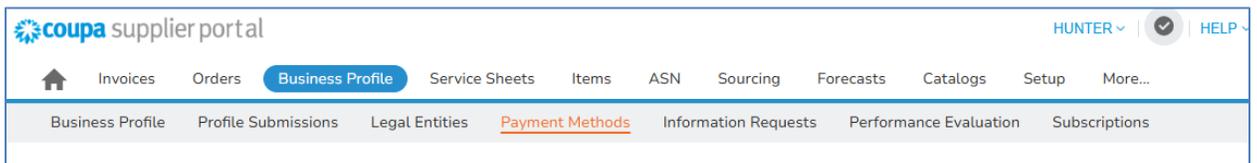
Per page [5](#) | [10](#) | [20](#)

All active payment methods will be listed under **Business Profile > Payment Methods**. To un-share with a customer, click the Gear Icon to Manage Linked Customers.

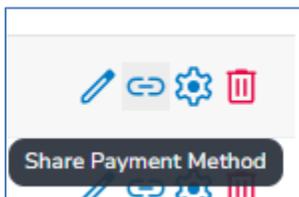
## H. Adding Customers to Active Remit-Tos

If you have linked with new customers and need to send them pertinent financial information, the below steps will outline how to add their account to your active remit-to profile.

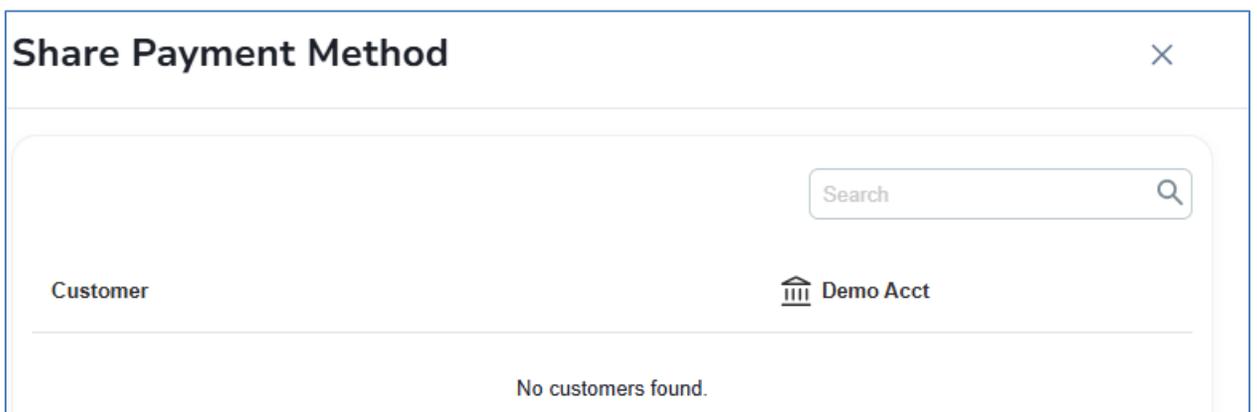
1. Scroll to the top menu bar at the top and select **'Business Profile'**.
2. In the sub bar, select **'Payment Methods'** from the menu.



3. Find your active remit-to profile with banking information under the **'Payment Method Name'** column and select the connection icon to the right under **'Actions'** that looks like a paper clip icon.



4. In the pop-up window, all new applicable customers will appear and you can share with the respective customer.



5. Once added, you will see the customer's name under the **'Shared with Customer'** column as seen below. The remit-to banking profile will then be

sent to New Story's instance to ensure they're using the banking details managed within your portal.

### Payment Methods

Add Payment Method ▾ Search

Payment Method	Payment Method Name	Country	Currency	Linked Legal Entity	Shared With Customers	Payment Method Status	Actions
 Bank Transfer	Demo Acct	United States	USD	JHK Consulting	Test	Active	   
 Bank Transfer	Bank of UAT	United States	USD	JHK Consulting	Test	Active	   