New Story's Coupa Supplier Onboarding Guide

Contents

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.
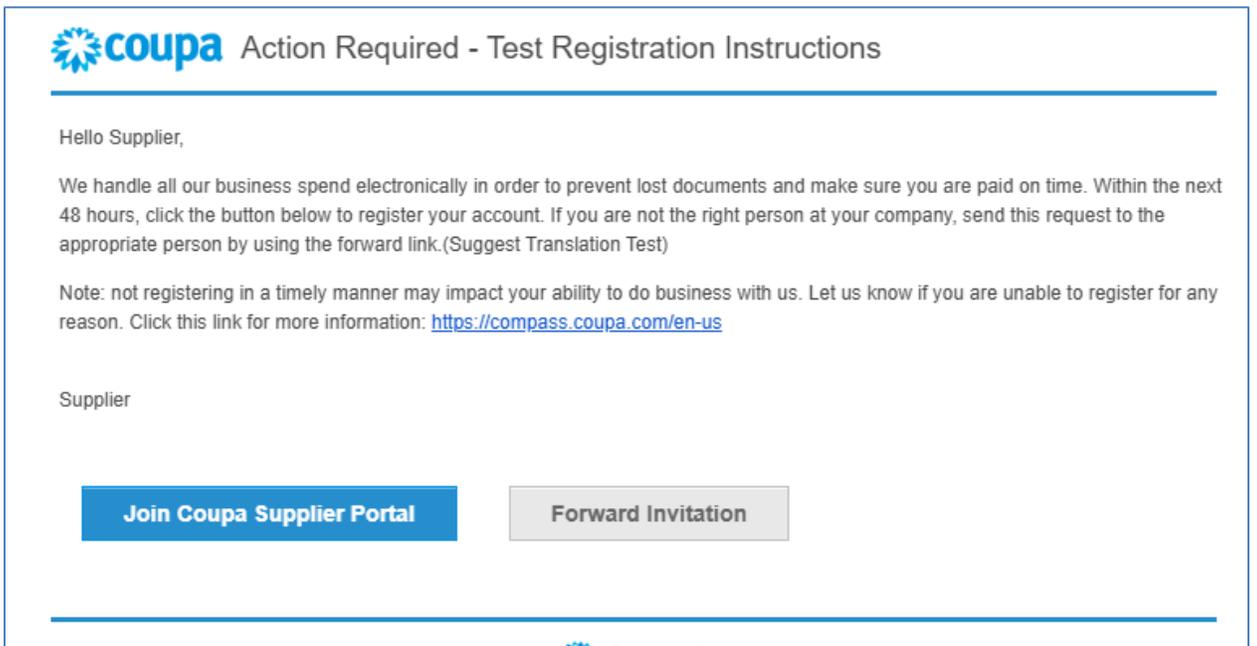
I.   Onboarding Steps Summary

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.

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.*

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.

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.
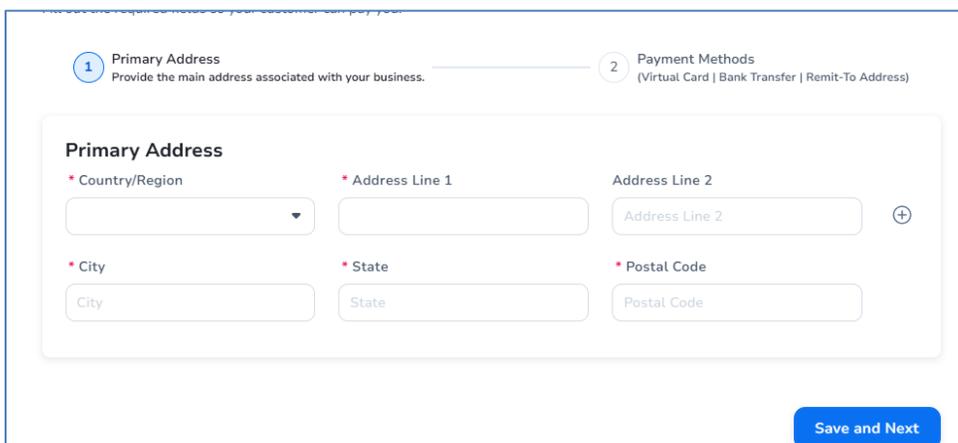

Once verified, the proceeding windows will gather all pertinent information such as addresses, remittance, banking etc.

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

Account Nickname * (i)

Beneficiary Legal Name * (i)

Bank Branch Country / Region *

United States ▼

Bank Account Currency *

USD ▼

Bank Branch State / Province *

▼

Bank Name *

Account Number *

4-17 digits

ACH Routing Number *

9 digits

Wire Routing Number (i)

9 digits

SWIFT / BIC Code (i)

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 ✕
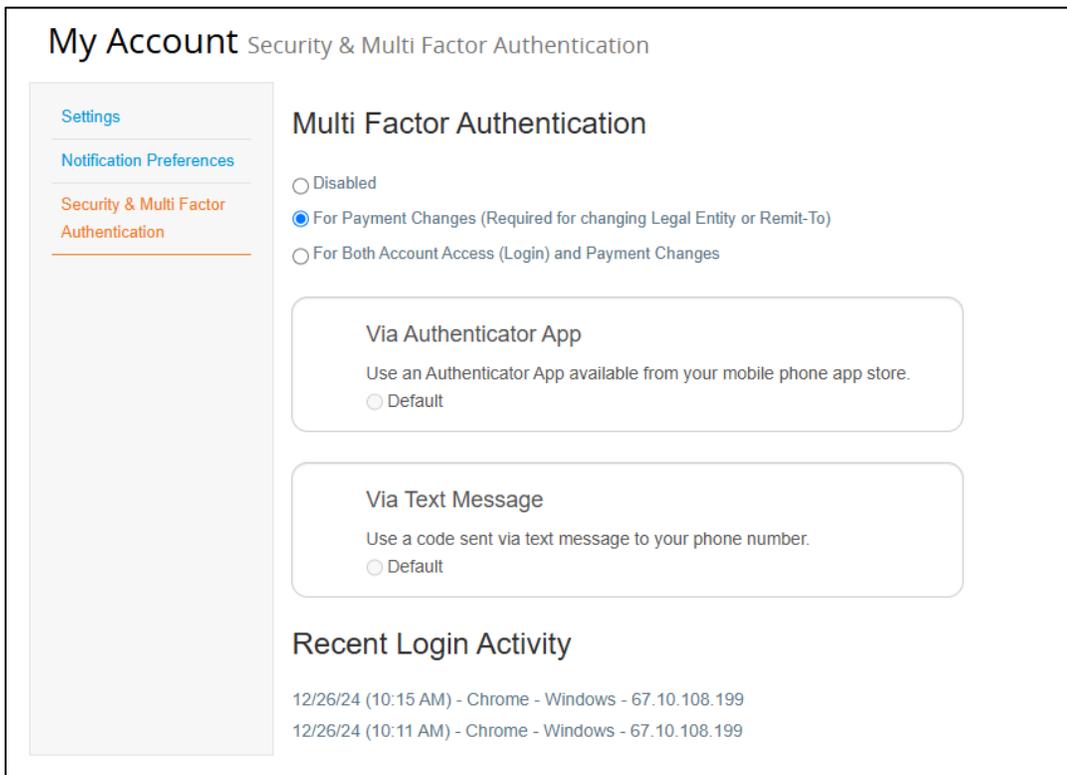
Subscriptions

Most Popular

Registered

Easily do business with customers who use Coupa

Free

Registered user includes:

- Business Profile
- Orders
- E-Invoices
- Catalogs
- Payments
- Sourcing Events

Continue

🔵 Coupa Verified

Amplify your trusted brand across Coupa's community of buyers

$549 / year

Everything in 'Registered' plus:

- Verified Badge
- Priority Search Rank

Purchase Verified

🟡 Coupa Advanced

Optimize your cash flow and increase productivity throughout your day

$4,800 / year

Everything in 'Registered' plus:

- Automated invoice reminders and reporting
- A seamless integration with your account system

Purchase Advanced

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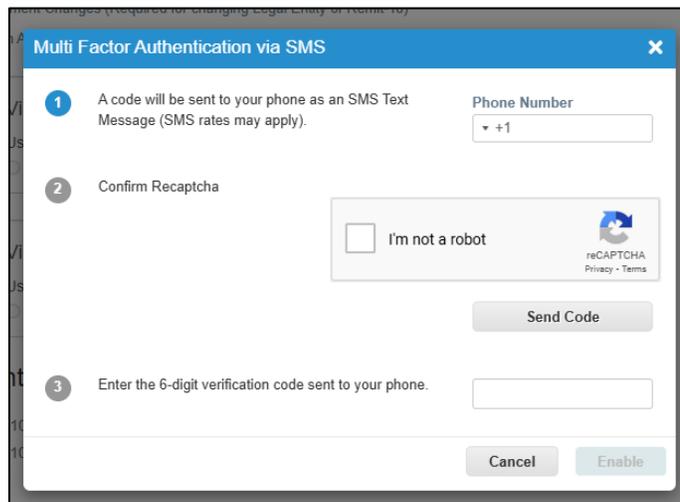
After CSP registration is complete, you will need to set up the **Security & Multi Factor Authentication** information. Navigate to **(Your Name)** in the upper right of your screen **> Account Settings > Security & Multi Factor Authentication.** Be sure to select the desired method of authentication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

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.coupahost.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.



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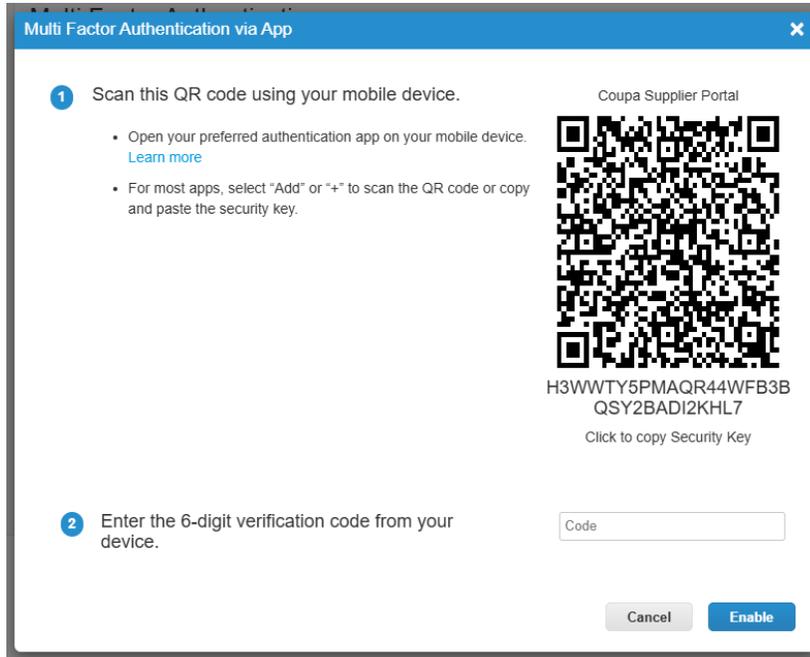
Print your backup codes provided or email them to yourself before you click **OK**. If you ever lose your device, you need these to regain access to your CSP account.

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.
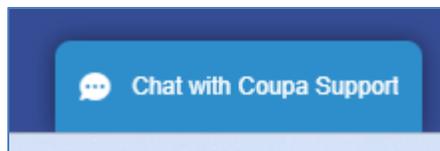

## D. Adding Google Authenticator Plugin to Browser

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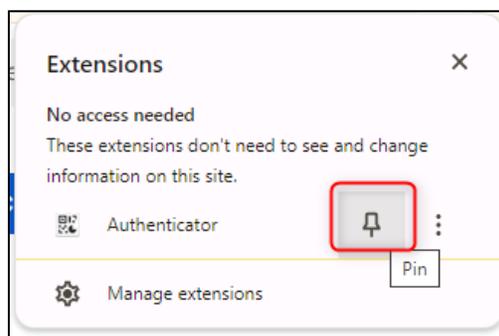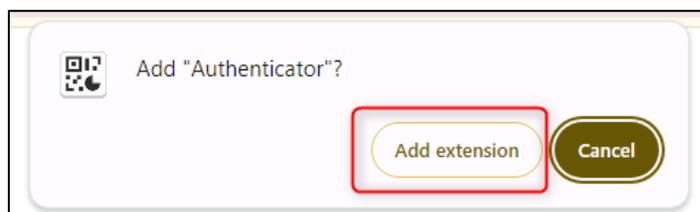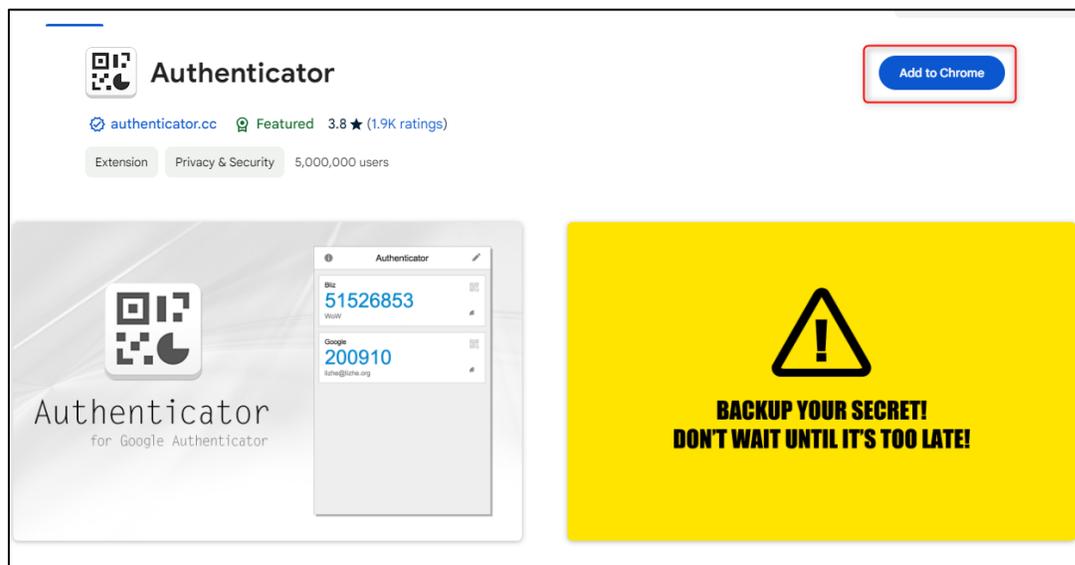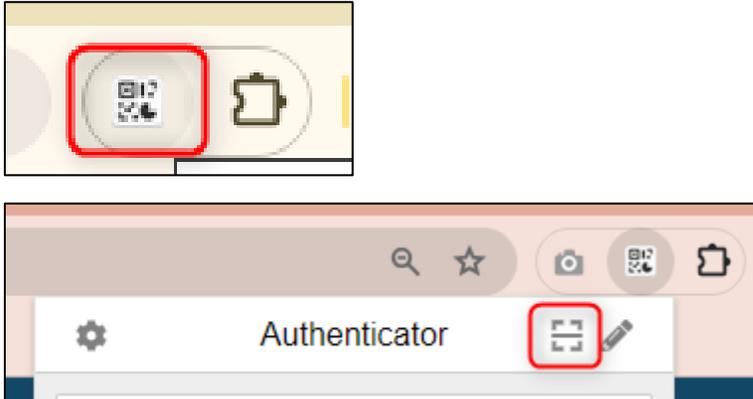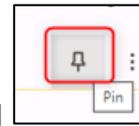
To utilize the Scan QR code function, ensure you have the **Coupa Multi Factor Authentication** window open as seen below to scan the provided QR code. **Scan**

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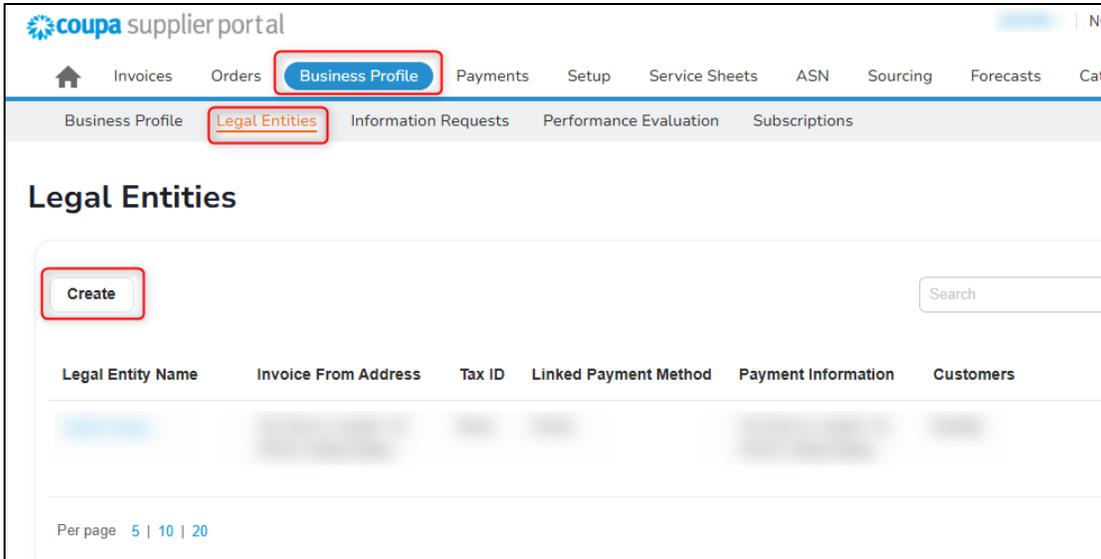

This plugin will always be available in the browser once pinned in the extensions section in the upper right corner of the browser.
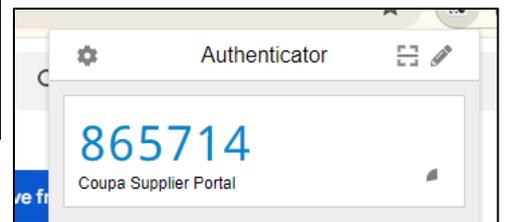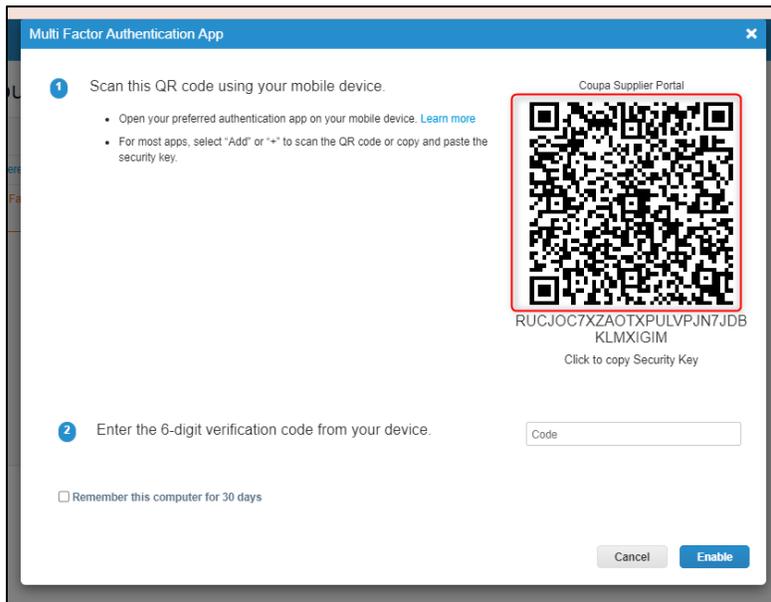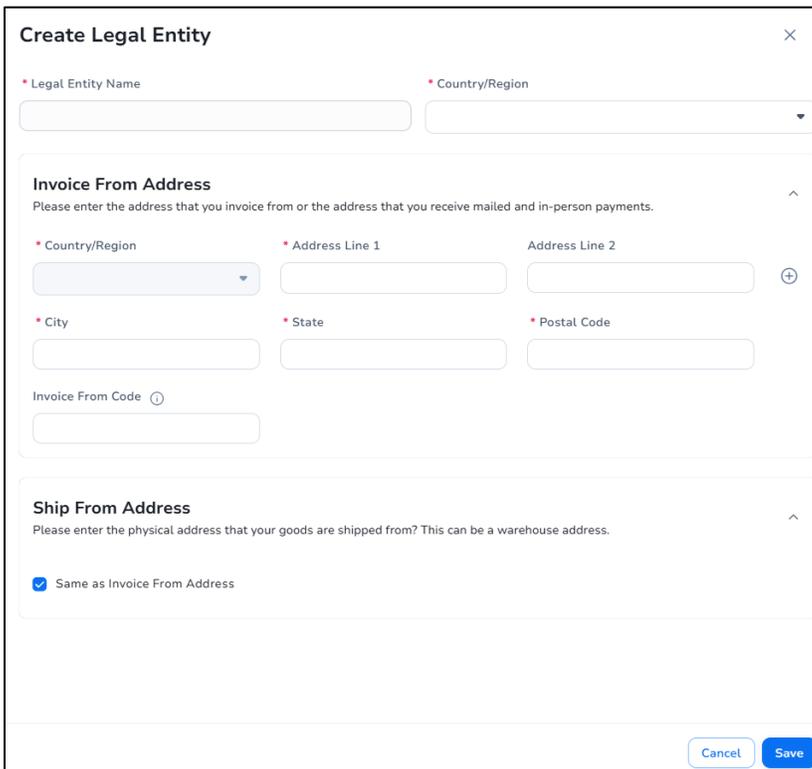
E. Creating a Legal Entity

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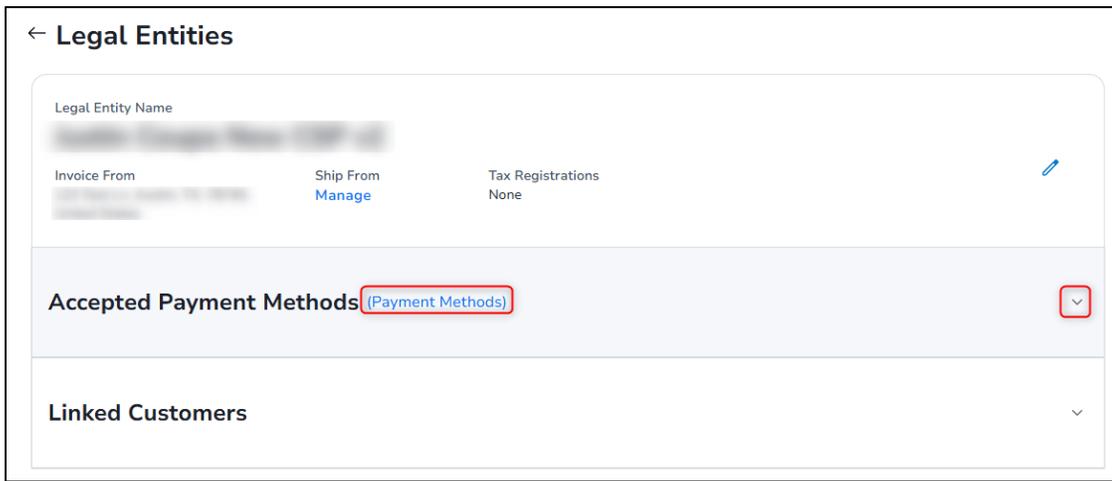
After the Legal Entity has been created, a **Payment Method** is required to be created for either address only or banking details (section **F** below).

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.

Add Payment Method ✕

Bank Transfer

Please enter the following information to receive Bank Transfer payments.

Account Nickname * ⓘ

Beneficiary Legal Name * ⓘ

Bank Branch Country / Region *

United States ▼

Bank Account Currency *

USD ▼

Bank Branch State / Province *

▼

Bank Name *

Account Number *

4-17 digits

ACH Routing Number *

9 digits

Wire Routing Number ⓘ

9 digits

SWIFT / BIC Code ⓘ

8 or 11 characters

Additional Information

Remittance Email ⓘ

Remit-To Code ⓘ

Cancel   **Save**

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.


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.
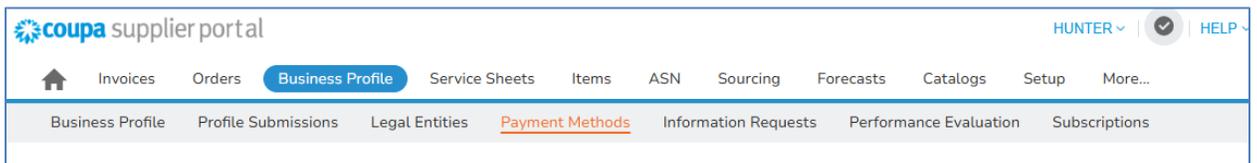
3. Find your active remit-to profile with banking information under the **'Payment Method Name'** column and select the connection icon to the right under **'Actions'** that looks like a paper clip icon.
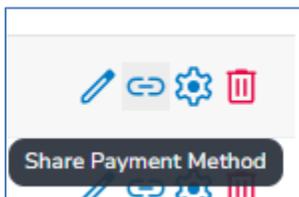
4. In the pop-up window, all new applicable customers will appear and you can share with the respective customer.
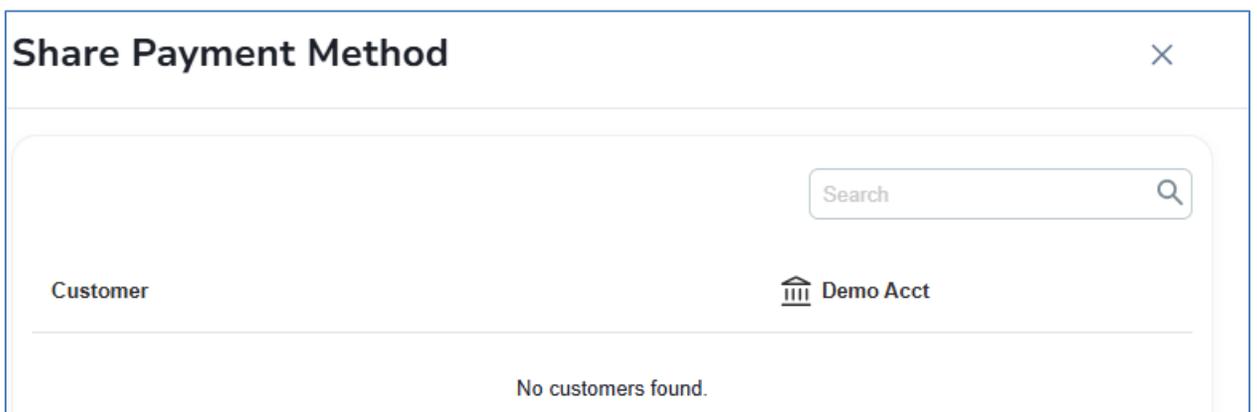
5. Once added, you will see the customer's name under the **'Shared with Customer'** column as seen below. The remit-to banking profile will then be

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

Payment Methods

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	✏ 🔗 ⚙ 🗑

Add Payment Method ▾