

Enable Multifactor and Create a Legal Entity

About this Guide

This guide is intended to show suppliers enable their multifactor authenticator and create their legal entity to begin invoicing Flynn in Coupa.

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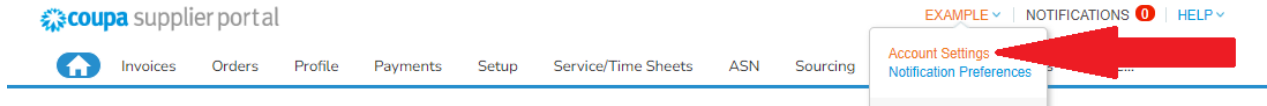
Add Payment Method.....10

Add a new Payment Method.....11

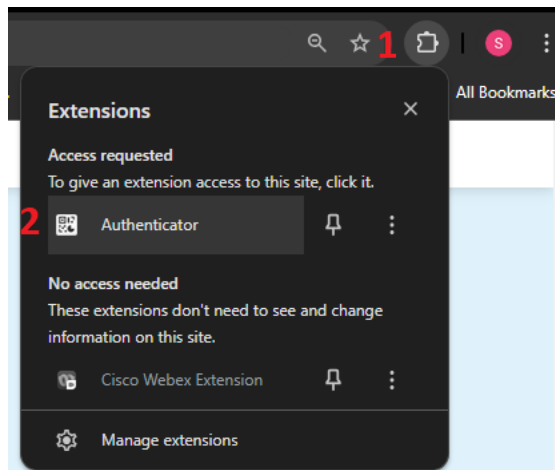
Setup Complete.....14

Establish Multifactor Authentication via Authenticator App on Google Chrome

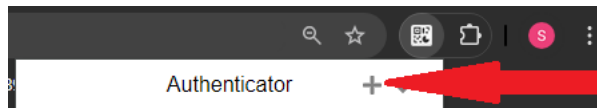
- 1.) Log in to the Coupa Supplier Portal (CSP). Hover your mouse over your name located in the top right corner, two options will appear. Click on the Account Settings option.



- 2.) Select the third option on the left side under My Account labeled "Security & Multi Factor Authenticator"
- 3.) Add the relevant extension to your browser:
 - a. Google Chrome extension [authenticator](#)
- 4.) In Coupa, a pop up labeled "Multifactor Authentication via App" will appear
- 5.) Copy the Security Key password shown **underneath** the QR code
- 6.) How to enter the information into the chrome extension:
 - a. Click the extension icon then Authenticator

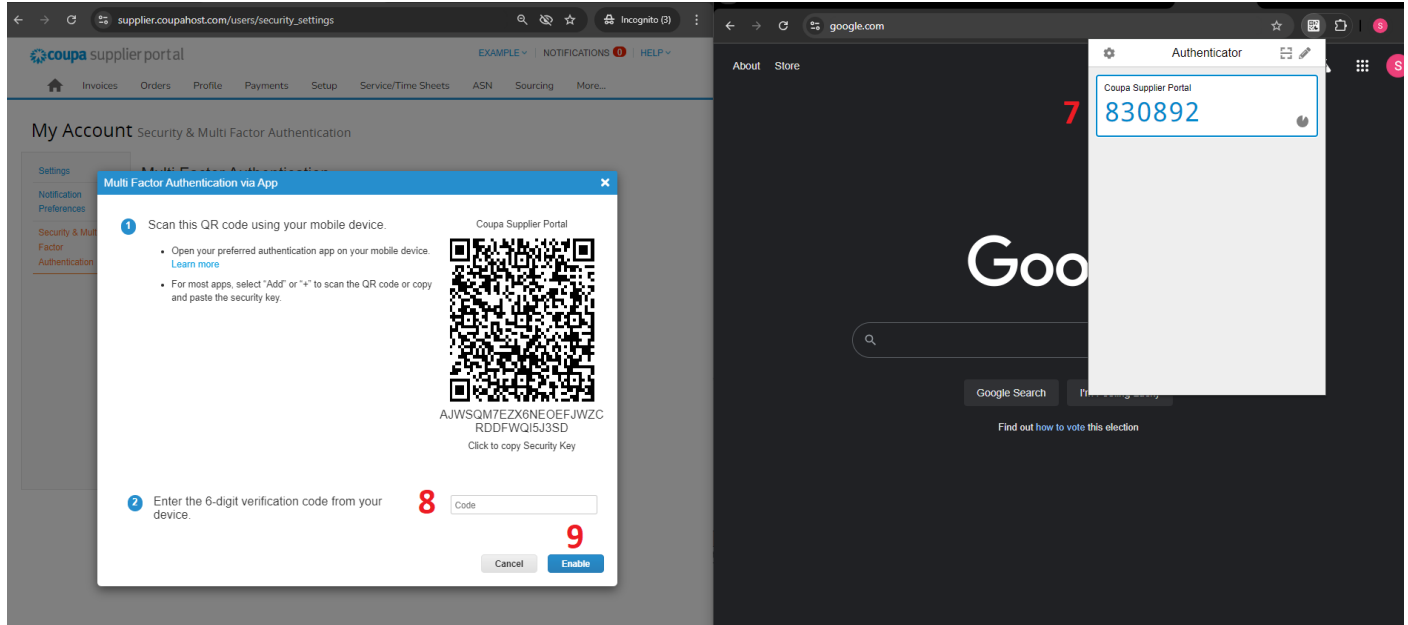


- b. Click the pencil icon
- c. Click on the "+" icon



- d. Click on "Manual Entry" option
- e. Under Issuer: Type in "Coupa Supplier Portal"
- f. Under Secret, Paste you Special Key
- g. Hit Ok
 - i. Note, a new 6-digit code will now appear every 30 seconds

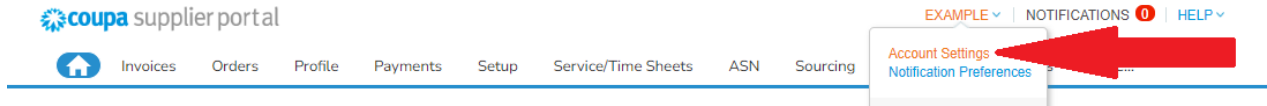
Enable Multifactor and Create a Legal Entity Reference Guide



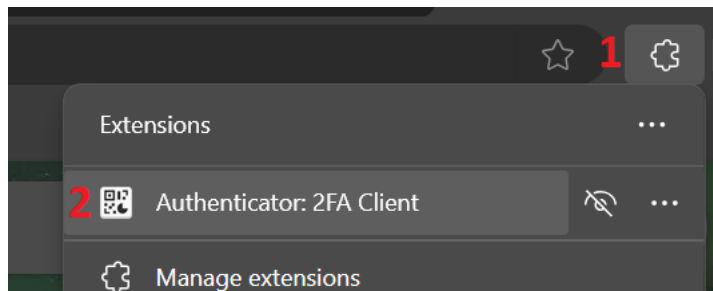
- 7.) In your browser with the Authenticator App, copy of the 6 digit code
- 8.) In Coupa, paste the 6 digit code in the text box to the right of step 2
- 9.) Click Enable
- 10.) A pop up label "Save Your Back Up Codes" will appear, save these via downloading or printing depending on your personal preference.
- 11.) Click the "X" in the top right corner of "Save Your Back Up Codes"

Establish Multifactor Authentication via Authenticator App on Microsoft Edge

- 1.) Log in to the Coupa Supplier Portal (CSP). Hover your mouse over your name located in the top right corner, two options will appear. Click on the Account Settings option.



- 2.) Select the third option under My Account labeled “Security & Multi Factor Authenticator”
- 3.) Add the relevant extension to your browser:
 - a. Microsoft Edge extension [authenticator](#)
- 4.) In Coupa, a pop up labeled “Multifactor Authentication via App” will appear
- 5.) Copy the Security Key password shown **underneath** the QR code
- 6.) How to enter the information into the extension:
 - a. click the extension icon then Authenticator



- b. Click the pencil icon

- c. Click on the “+” icon



- d. Click on “Manual Entry” option

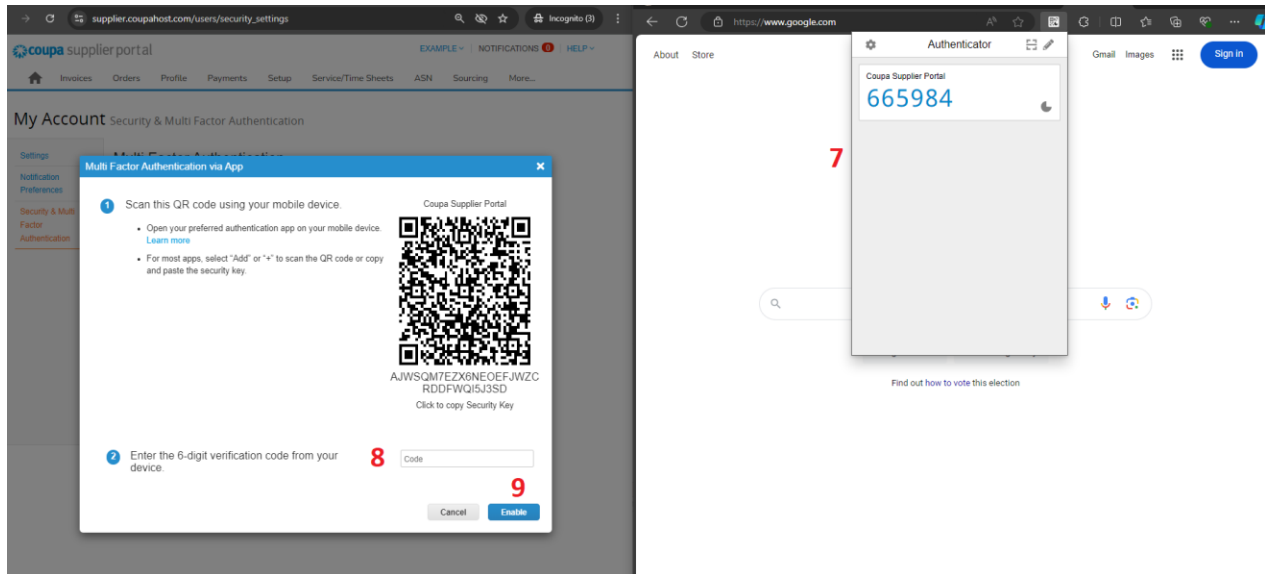
- e. Under Issuer: Type in “Coupa Supplier Portal”

- f. Under Secret, Paste your Special Key

- g. Hit Ok

- i. Note, a new 6-digit code will now appear every 30 seconds

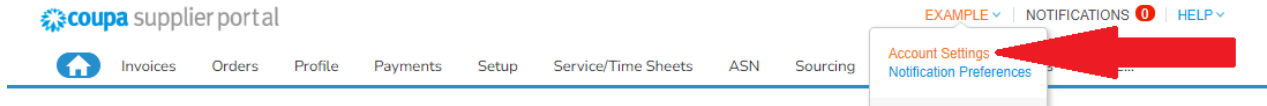
Enable Multifactor and Create a Legal Entity Reference Guide



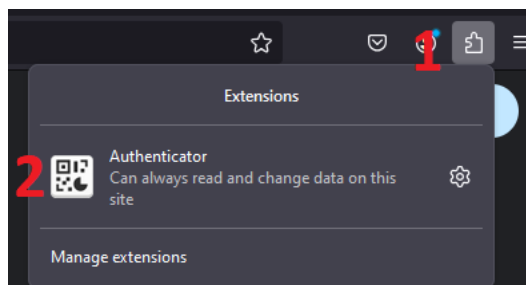
- 7.) In your browser with the Authenticator App, copy of the 6 digit code
- 8.) In Coupa, paste the 6 digit code in the text box to the right of step 2
- 9.) Click Enable
- 10.) A pop up label "Save Your Back Up Codes" will appear, save these via downloading or printing depending on your personal preference.
- 11.) Click the "X" in the top right corner of "Save Your Back Up Codes"

Establish Multifactor Authentication via Authenticator App on FireFox

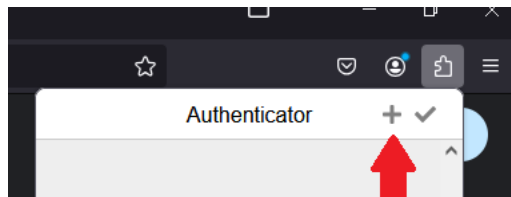
- 1.) Log in to the Coupa Supplier Portal (CSP). Hover your mouse over your name located in the top right corner, two options will appear. Click on the Account Settings option.



- 2.) Select the third option under My Account labeled “Security & Multi Factor Authenticator”
- 3.) Add the relevant extension to your browser:
 - a. Mozilla Firefox extension [authenticator](#)
- 4.) In Coupa, a pop up labeled “Multifactor Authentication via App” will appear
- 5.) Copy the Security Key password shown **underneath** the QR code
- 6.) How to enter the information into the extension:
 - a. click the extension icon then Authenticator

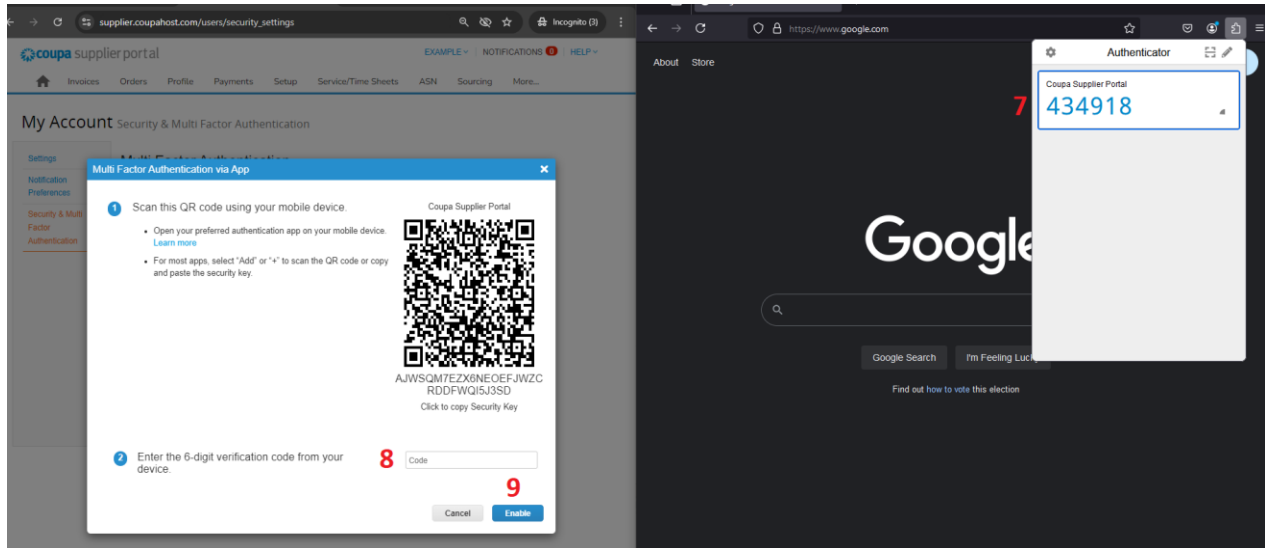


- b. Click the pencil icon
- c. Click on the “+” icon



- d. Click on “Manual Entry” option
- e. Under Issuer: Type in “Coupa Supplier Portal”
- f. Under Secret, Paste you Special Key
- g. Hit Ok
 - i. Note, a new 6-digit code will now appear every 30 seconds

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- 7.) In your browser with the Authenticator App, copy of the 6 digit code
- 8.) In Coupa, paste the 6 digit code in the text box to the right of step 2
- 9.) Click Enable
- 10.) A pop up label "Save Your Back Up Codes" will appear, save these via downloading or printing depending on your personal preference.
- 11.) Click the "X" in the top right corner of "Save Your Back Up Codes"

Establish Multifactor Authentication via SMS

- 1.) In Coupa, a pop up labeled “Multifactor Authentication via App” will appear, click on the cancel button in the button right.
- 2.) Click on the Circle located to the right of “Via Text Message”

My Account [Security & Multi Factor Authentication](#)

[Settings](#)
[Notification Preferences](#)
[Security & Multi Factor Authentication](#)

Multi Factor Authentication

☒ For Payment Changes (Required for changing Legal Entity or Remit-To)
☐ For Both Account Access (Login) and Payment Changes

Via Authenticator App

Use an Authenticator App available from your mobile phone app store.

☐ Default

Via Text Message

Use a code sent via text message to your phone number.

☐ Default

Recent Login Activity

10/02/24 (02:12 PM) - Chrome - Windows - 4.35.118.166

10/02/24 (02:08 PM) - Chrome - Windows - 4.35.118.166

Multi Factor Authentication via SMS

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

2 Confirm Recaptcha

3 Phone Number

4 ☐ I'm not a robot

5 Send Code

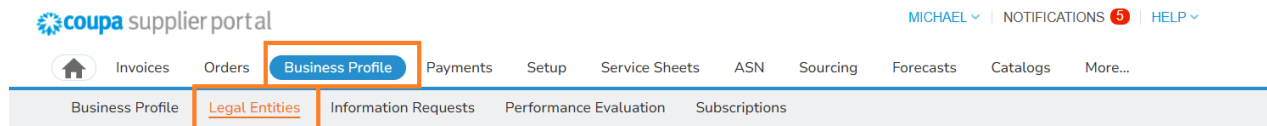
6 Enter the 6-digit verification code sent to your phone.

7 Cancel Enable

- 3.) Enter your phone number into the box provided, DO NOT REMOVE THE +1
- 4.) Click and complete the reCAPTCHA
- 5.) Click “Send Code”
- 6.) Enter the 6-digit code that was sent to you phone
- 7.) Click Enable
- 8.) A pop up label “Save Your Back Up Codes” will appear, save these via downloading or printing depending on your personal preference.
- 9.) Click the “X” in the top right corner of “Save Your Back Up Codes”

Create your Legal Entity

1.) Click the word Business Profile then click on Legal Entities



2.) A pop up will appear labeled “Multi Factor Authentication”, enter the six code that was sent to your cell phone or authenticator app/extension in the box provided

3.) Hit the blue Ok button

4.) Click the Create Button



Legal Entities



5.) Enter your business’s legal name in the box underneath Legal Entity Name

6.) Click on the drop-down box located underneath Country/Region, scroll down and click on United States

7.) Under Tax Registration, below Country/Region, scroll down and click on United States then below Tax ID enter the business’s EIN or SSN

8.) Under Address Line 1, enter the street address of business

9.) Under City, enter the city business is in

10.) Under State, from the drop down select the state the business is in

11.) Under Postal Code, enter the postal code the business is in

12.) Ensure Ship From Address check box is clicked

13.) Click Save

Create Legal Entity

* Legal Entity Name * Country/Region

Tax Registrations

* Country/Region Tax ID

☐ I don't have a Tax ID Number

[Add Tax Registration](#)

Invoice From Address

Please enter the address that you invoice from or the address that you receive mailed and in-person payments.

* Country/Region * Address Line 1 Address Line 2

* City * State * Postal Code

Invoice From Code Preferred Language

Ship From Address

Please enter the physical address that your goods are shipped from? This can be a warehouse address.

☒ Same as Invoice From Address

[Cancel](#) [Save](#)

14.) A pop up message will appear where you now enter your payment information, please click on the continue button

Business Legal Entity successfully created. Next, you must add payment info or a remittance address required for invoicing. Go to Setup > Payment Methods and click "Add Payment Method" to complete this.

Close Continue

Add Payment Method

1.) Click on the Add Payment Method Button

Admin Remit-To

Users

Add Payment Method

2.) Select the Legal Entity you just create by from the options in the drop down menu next to Legal Entity and click next

×

Add Payment Method

Legal Entity

TEST

Invoice From Address

test
cleveland, OH, 44131
United States

ⓧ

Next

Add a new Payment Method

1.) For **check payment**, click on the drop down located next to Payment type and click on **Address**. If Remit Address is correct click on the blue Save and Continue button.

Add a new Payment Method

Address

Address

Bank Account

Virtual Card

Address

Address

Bank Account

Virtual Card

* Payment Type

Address

Address

Bank Account

Virtual Card

Address

Address

Bank Account

Virtual Card

* Address Line

Address

Address

Bank Account

Virtual Card

Address

Address

Bank Account

Virtual Card

* City

Address

Address

Bank Account

Virtual Card

Address

Address

Bank Account

Virtual Card

* State

Select an Option

Select an Option

Select an Option

Select an Option

Select an Option

Select an Option

Select an Option

Select an Option

Select an Option

* Postal Code

Address

Address

Bank Account

Virtual Card

Address

Address

Bank Account

Virtual Card

* Country/Region

United States

United States

United States

United States

United States

United States

United States

United States

United States

* What is your Remit-To Integration Code? (optional)

* Which customers can use this account?

* Recommended

When you receive payments to a different location to where your business is registered, add the address here.

When you receive payments to a different location to where your business is registered, add the address here.

Cancel

Save & Continue

Cancel

Save & Continue

- 2.) For **ACH payment**, click on the drop down located next to Payment type and click on **Bank Account**. Enter the state where your bank is located, Bank's name, account number, confirm account number, ACH routing number. If you do not have access to your bank's Wire/SWIFT information, please click on the check box labeled "My bank does not have a BIC code. Once the information has been filled out, click on the blue Save and Continue button

The screenshot shows the 'Payment Type' dropdown menu open, with 'Bank Account' selected. The form contains the following fields and sections:

- Payment Type:** Bank Account (selected)
- What are your Bank Details?** (Section header)
- Address:** (Field)
- States:** (Dropdown menu)
- State:** Select an Option (Dropdown menu)
- Bank Account Currency:** USD (Dropdown menu)
- Beneficiary Name:** EXAMPLE VENDOR (Text field)
- Bank Name:** (Text field)
- Account Number:** (Text field)
- Confirm Account Number:** (Text field)
- ACH Routing Number:** (Text field)
- Wire Routing Number:** (Text field)
- SWIFT/BIC Code:** (Text field)
- My bank does not have a BIC code:** (Checkbox)
- Branch Code:** (Text field)
- Bank Account Type:** Business (Dropdown menu)
- Supporting Documents:** Choose Files (button), No file chosen (text)
- Email Address:** (Text field)
- Who is your Remit-To Contact? (optional):** (Section header)
- What is your Remit-To Address?** (Section header)
- Address Line 1:** 123 STREET (Text field)
- City:** CITY (Text field)
- State:** OH (Text field)
- Postal Code:** 12345 (Text field)
- Country/Region:** United States (Text field)
- Buttons:** Cancel, Save & Continue

Numbered steps (1-8) are overlaid on the form:

1. Click on the 'Bank Account' dropdown menu.
2. Click on the 'State' dropdown menu.
3. Click on the 'Bank Name' text field.
4. Click on the 'Account Number' text field.
5. Click on the 'Confirm Account Number' text field.
6. Click on the 'ACH Routing Number' text field.
7. Click on the 'My bank does not have a BIC code' checkbox.
8. Click on the 'Save & Continue' button.

- 3.) For payment via **virtual credit card**, click on the drop down located next to Payment type and click on **Virtual Card**. Enter a remit email address in the box located the right of Email Address. If your company processes credit card automatically, please click the appropriate check box. Once the information has been filled out, click on the blue Save and Continue button.

- 4.) click the blue Next button.

- 5.) click the blue Done button.

Setup Complete

1.) click the blue Add Now button.

Setup Complete

×



Congratulations!

This legal entity can now be used on new invoices.

To get paid - Most customers require that you send them this payment info **in addition to providing it on the invoice.** [i](#)

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

Add Later

Add Now