Registering with Coupa

About this Guide

Suppliers must register for the Coupa Supplier Portal (CSP). Suppliers will receive an invitation link from Flynn to complete their registration. To transact with Flynn, suppliers must create an account on the CSP.

After registration, suppliers must complete an **Information Request**. An Information Request, or data submission form, is required to establish and manage your account. Information needed for the Information Request is your contact , remit-to address(es), insurance and tax information.

You will need to have the below items when completing the registration form:

- Access to Mobile Device & Desktop/Laptop
- Signed W9 saved to your Desktop/Laptop
- Bank Information if preferred payment method is via ACH
- Certificate of Insurance saved to your Desktop/Laptop issued out to:
    - Flynn Restaurant Group
      ATTN: RISK
      6200 Oaktree Blvd Suite 250
      Independence, OH 44131

This guide contains the following sections:

Accepting the Coupa Invitation

1.) Once Flynn requests to add you as a new supplier, you will receive a welcome email with an Information Request. **Click on Join and Respond** to begin the registration process. **Note that you must register for the Coupa Supplier Portal (CSP) to transact with Flynn.**
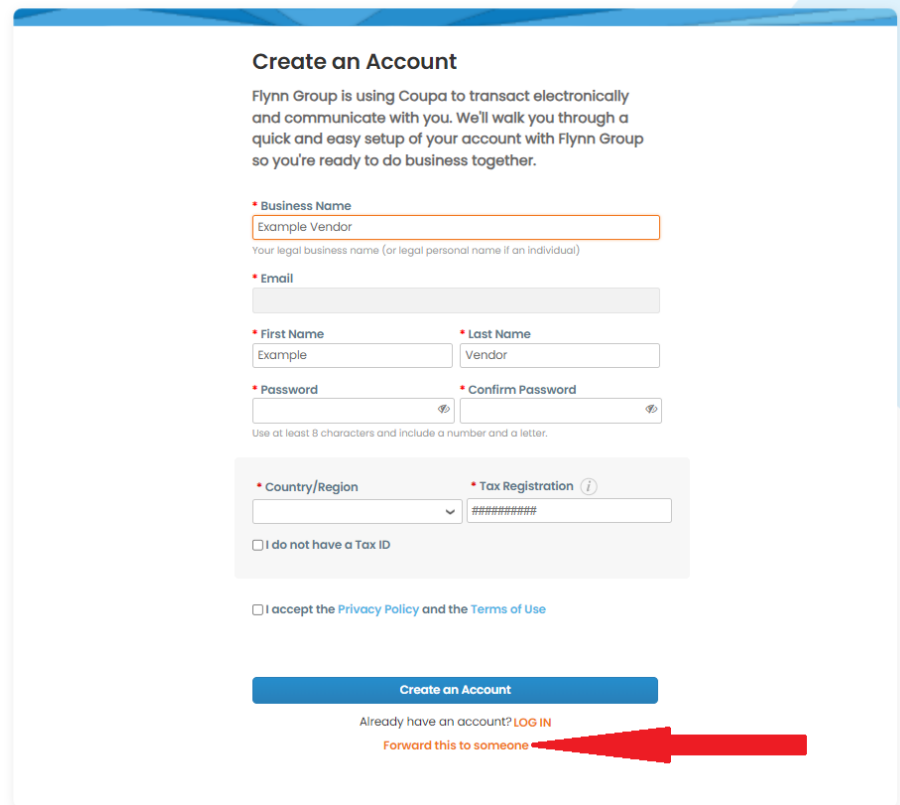

2.) If you are the correct billing contact click on Join Coupa Supplier Portal, this will open a tab on your default browser.

3.) If you are not the correct billing contact, click Forward Invitation, this will open a tab on your default browser.

    a. Click on the Forward Invitation Button
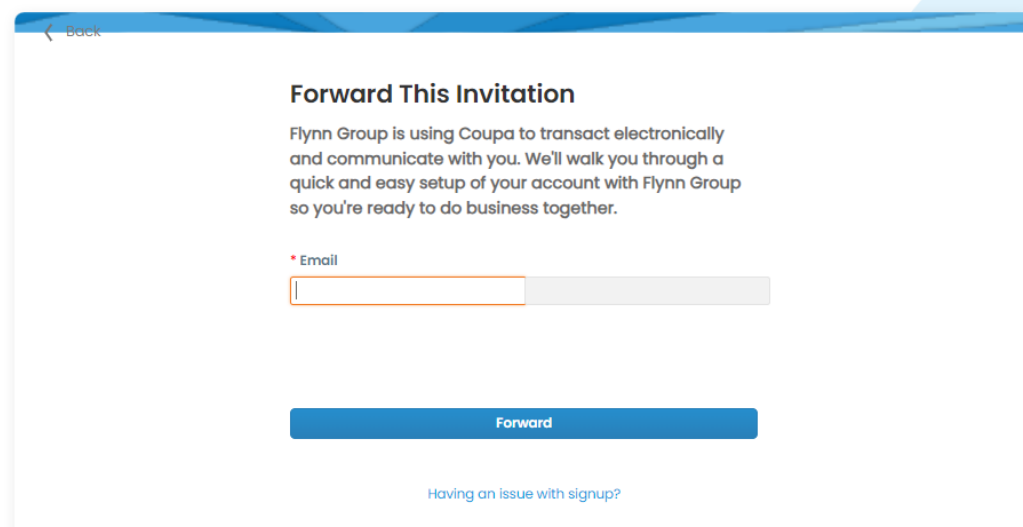
    b. Enter the email address of the person you would like to forward the invitation to

Registering for Coupa

1.) If you have any existing account, click the orange Log In text to sign into your existing Coupa account. This action will have the invitation to link with Flynn in Coupa be automatically accepted.

2.) If you do not have an existing Coupa account, please follow the prompts some information will be automatically filled out.
   a. The below information will be prepopulated and is what was entered by your Flynn point of contact to begin your onboarding. This information can be edited to be more accurate if needed.
      i. Business Name
      ii. First Name
      iii. Last Name
   b. The email address **cannot** be edited, if you need to have the email address changed please reach out to your Flynn point of contact.
   c. The below information will need to entered to create your Coupa account:
      i. Password
      ii. Confirm Password
      iii. County/Region business is located
      iv. Tax Registration (i.e. Tax ID or SSN)

3.) Accept the terms of use

4.) Click Create Account

5.) You will receive a 6 digit verification code in your email, please enter the six digit verification code in boxes provided and hit Next.

Set Up Legal Entity (First-Time Coupa Login)

1.) You will be brought to a pop up page labeled "Coupa Supplier Portal Onboarding" in the account details page

    a. If this is not your first time logging into Coupa, please continue to page 8

2.) Under County/Region select Country business is located in

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

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

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

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

7.) Ensure Ship From Address check box is clicked

8.) Click Save and Next

Set Up Payment Method (First-Time Coupa Login)

1.) You will be brought to a pop up page labeled "Coupa Supplier Portal Onboarding" in the payment information page
2.) You will be given three choices of payments methods to complete, **at least one** needs to be allowed for account creation
3.) You will first be brought to Virtual Card
   a. Please enter the payment method name such as "Flynn Credit Card" and the remittance email address under Email address
      i. Click Save and Next
   b. If you **do not wish** to receive payments via Virtual Card, check the *"Do not accept Virtual Card payments from this customer"* box
      i. Click Save and Next
4.) You will then be brought to Bank Account
   a. Please enter the payment method name such as "Flynn ACH" enter provide the below information:
      i. State where bank is located
      ii. Beneficiary Name
      iii. Bank Name
      iv. Account Number
      v. Confirm Account Number
      vi. ACH Routing Number
      vii. Click Save and Next
   b. If you **do not wish** to receive payments via Virtual Card, check the *"Do not accept Bank Account payments from this customer"* box
      i. Click Save and Next
5.) You will last be brought to Check
   a. Please enter the payment method name such as "Flynn Check" enter provide the below information:
      i. Street address
      ii. City
      iii. State
      iv. Zip Code
      v. Click Save and Next
   b. *"Do not accept check payments from this customer"* box
      i. Click Save and Next

Select Tier Status

1. Choose from any of the three Coupa options shown. However, to transact with Flynn, selecting the **free "Registered" option** is all that's required.

2. Once your option is selected, click next.

Establish Multifactor Authentication via Authenticator App on Desktop

1.) Log into 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.
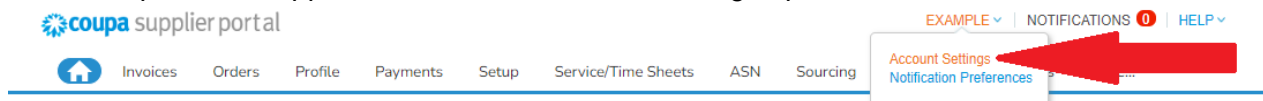
2.) Select the third option on the left side under My Account labeled "Security & Multi Factor Authenticator"

3.) Add the relevant extension to your browser:
   a. Google Chrome extension authenticator
   b. Microsoft Edge extension authenticator
   c. 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 get the authentication code in the authenticator extension:
   a. Click the extension icon then "Authenticator"
   b. Click the pencil icon
   c. Click on the "+" icon located to the right of "Authenticator"
   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
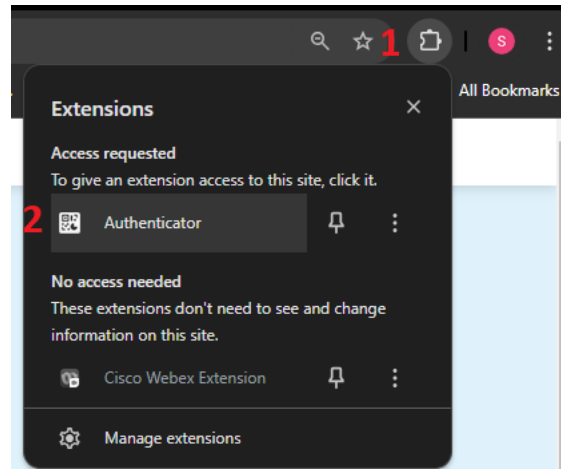
7.) In your browser with the Authenticator App, copy the 6-digit code

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 labeled "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"
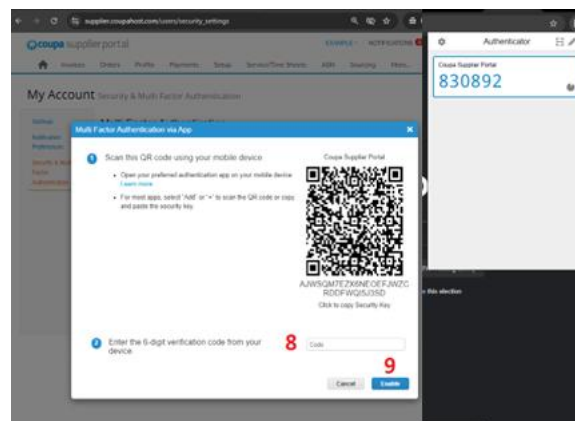
Establish Multifactor Authentication via SMS

1.) In Coupa, a pop up labeled "Multifactor Authentication via App" will appear, click on the cancel button in the bottom right

2.) Click on the circle located to the right of "Via Text Message"

3.) Complete the prompts provided in descending order, once completed click enable

4.) A pop up label "Save Your Back Up Codes" will appear, save these via downloading or printing depending on your personal preference

5.) Click the "X" in the top right corner of "Save Your Back Up Codes"

Set Up Legal Entity (Returning Coupa User)

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

2.) A pop up will appear labeled "Multi Factor Authentication", enter the 6 digit 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

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

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

7.) Under Tax Registration, below County/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

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

Set Up Payment Method (Returning Coupa User)

1.) Click the word Business Profile then click on Payment Methods
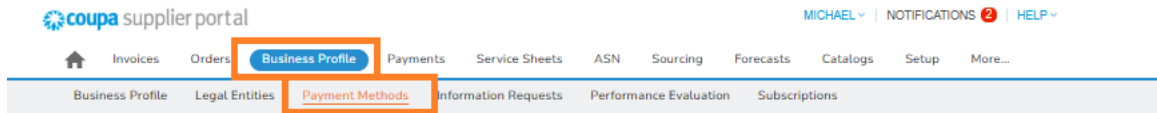
2.) Click on Payment Methods
3.) If you have your multiple authentication created, please enter the 6- digit code sent to the Authenticator App/phone number provided when you created your account or use the authenticator app and click ok.
4.) Select the option under Payment Methods

a.
b. Select the Legal Entity, enter in Payment Method Name such as "Payment For Flynn"
   i. For **Bank Transfer (ACH)**
      1. Enter the payment method name such as "Flynn ACH" enter provide the below information:
      2. State where bank is located
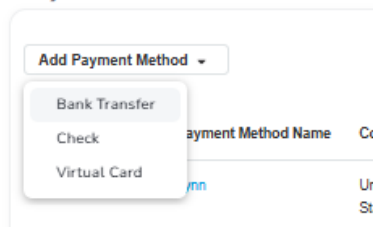   3. Beneficiary Name
      4. Bank Name
      5. Account Number
      6. Confirm Account Number
      7. ACH Routing Number
      8. Click Save and Next
   ii. For **Check**
      1. Enter the payment method name such as "Flynn Check" enter provide the below information:
      2. Street address
      3. City
      4. State
   5. Zip Code
      6. Click Save and Next

   c. For **Virtual Card (Credit Card)**
       i. Enter the payment method name such as "Flynn Credit Card"
       ii. Enter remittance email address under Email address
       iii. Click Save and Next
   iv.

5.) Click the check box for Flynn Group

   a.

6.) Click Save on the bottom right and click close.

Completing the Onboarding Form: Contact Information

1.)Click the button Business Profile and then click on Information Request
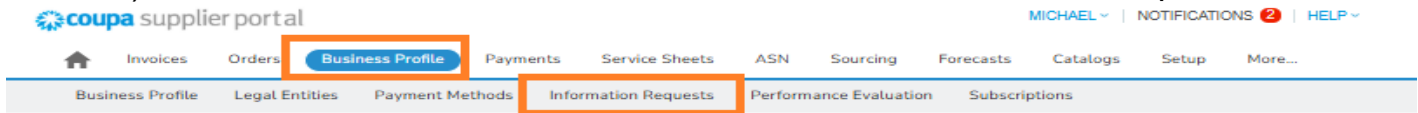
2.)Click on the drop down next select Customer and click on the option Flynn Group -, then under Form Responses click on the blue text labeled Supplier Information to open the form
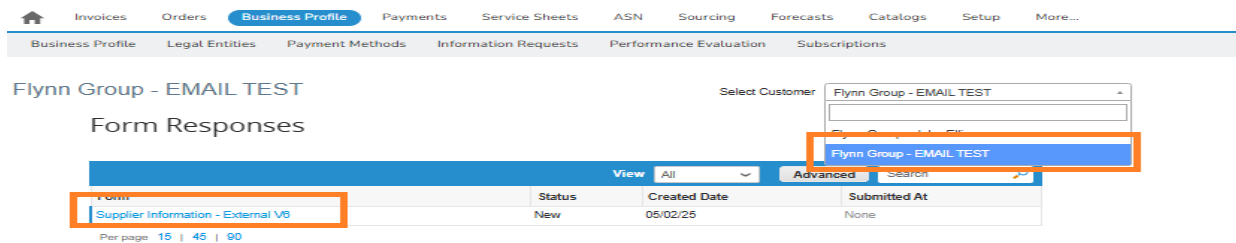
3.)Under Legal name, enter the Legal name of the business.

4.)Under Business Name, enter the dba of the business if needed

5.) Under Primary Contact enter:

    a. First Name of the person who will be Flynn's Point of Contact for your business

    b. Last Name of the person who will be Flynn's Point of Contact for your business

    c. Email of the person who will be Flynn's Point of Contact for your business

    d. Phone number of the person who will be Flynn's Point of Contact for your business

    e. PO Email of the person who will be Flynn's Point of Contact for your business

    Note, if you have no PO email, enter the email of the person who will be Flynn's Point of Contact for your business

Primary Address

Address Purpose

Select Some Options

Region
Country/Region

1

State Region

2 Ohio - OH

State ISO Code

US-OH

Address Name

3

Street Address

4 6200 OAKTREE BLVD SUITE 250

Street Address 2

5

Street Address 3

Street Address 4

City

6 INDEPENDENCE

Postal Code

7 44131

Location Code

6.) Under Primary Address enter:
- a. Under County/Region Select the County "United States" from the drop-down list
- b. State Region – Select the state in which your business is located
  - i. If your computer populates your address, state **WILL NOT** autofill
- c. Address Name: If payment need to be address or made to the attention to please enter it here
- d. Street Address of business
- e. Street Address 2: If there is a PO BOX or alternative address please enter it here
- f. City of business
- g. Zip code of business
  - Note, if your zip code starts with zero please include the leading zero when entering it

Completing the Onboarding Form: Payment Information

1.) Click Add Remit-To, your payment information may be populated already

a. If yes, click on the box to the left, till it shows as a blue checkbox and hit Add Selected, continue to step 2
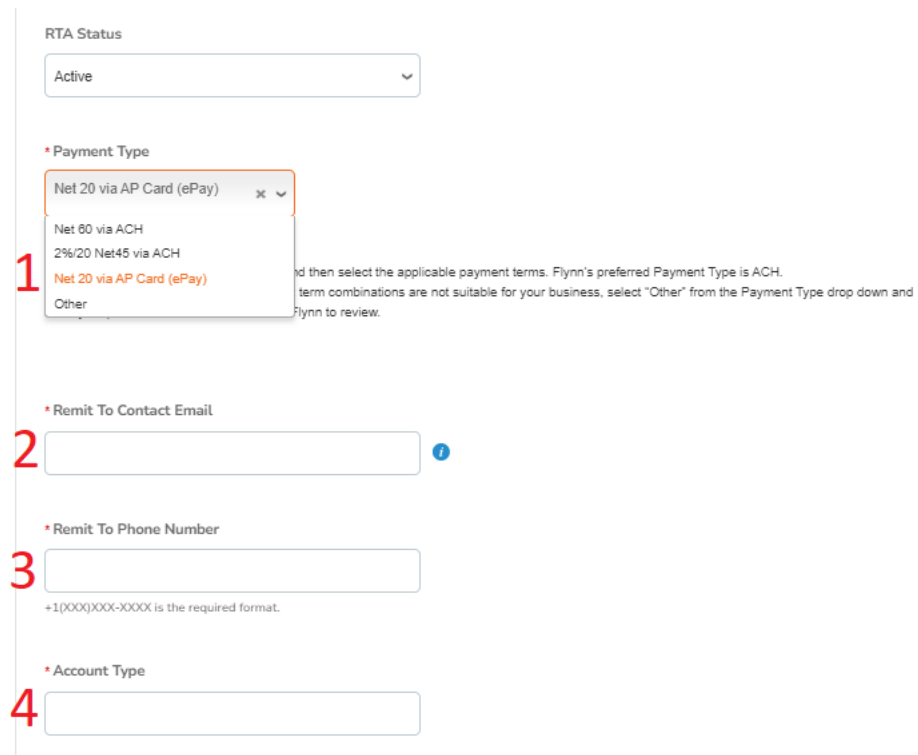

    i.

b. If not, please go back and follow steps for Establish Legal Entity and Add a new Payment Method

2.) Under the Remit-to Address now that a remit address has been entered, click on the drop down located under payment type:

a. For payment via **ACH**

    i. Click on the drop down under Payment Type

    ii. Select from the two available terms options.

    iii. Under Remit To Contact Email enter a good remit email address.

    iv. Under Remit To Phone Number, enter a good phone number in the format +1(XXX)XXX-XXXX.

    v. Under Account Type, enter either Checking or Savings

    vi. Check the box, labeled "Does the vendor accept these conditions?"

b. For payment via **virtual card**,
  i. Click on the drop down under Payment Type, select the option Net 20 via AP Card (ePay)
  ii. Under Remit To Contact Email enter a good remit email address.
  iii. Under Remit To Phone Number, enter a good phone number in the format +1(XXX)XXX-XXXX.
  iv. Under Account Type, enter either Checking or Savings.
  v. Check the box, labeled "Will the vendor have the ability to accept MasterCard Payments?"
  vi. Check the box, labeled "Does the vendor accept these conditions?"

c. For payment via **check**

    i. Click on the drop down under Payment Type, select the option Other

    ii. Under Other Payment Method and Term, type in Check at preferred terms.

    iii. Under Remit To Contact Email enter a good remit email address.

    iv. Under Remit To Phone Number, enter a good phone number in the format +1(XXX)XXX-XXXX.

    v. Under Account Type, enter either Checking or Savings.

Completing the Onboarding Form: Indemnification

    1.) Review the Indemnification section

        a.) Click the box located under Does the vendor accept these conditions?

        b.) Enter your name and position in the text box below Name and title of individual accepting conditions on behalf of vendor

1 * Does the vendor accept these conditions?

☐

2 * Name and title of individual accepting conditions on behalf of vendor

Completing the Onboarding Form: Certificate of Insurance

1.) After filling out the Remit-To Address, you will need to add a **Certificate of Insurance** if applicable.

    a. If you do not have Certificate of Insurance

        1. Select No drop the drop down

        2. Click the check box labeled "Does the supplier accept this condition?"

    b. If you do have a Certificate of Insurance select **Yes** and fill out the required information.
Please have Certificate Holder listed as:
Flynn Restaurant Group
Attn: Risk
6200 Oak Tree Blvd Suite 250
Independence, OH 44131

Note that if you do not have a certificate of insurance you may not be approved as a supplier for Flynn. Please coordinate directly with Flynn for this matter.

Completing the Onboarding Form: Tax Information

1.) The next fields you need to complete are the Tax Information/Registration fields.

2.) Under **Tax Information**, choose the type of organization that you have by clicking on the drop down below "**Organization Type**" (i.e., corporation, individual, partnership, etc).

Tax Information

* Organization Type

| |
| Corporation |
| Foreign Corporation |
| Individual |
| Foreign Individual |
| Partnership |
| Foreign Partnership |

3.) **Tax Registration**

    a. Click Add Tax Registration

    b. Select United States from the drop down located to the right of County

    c. Enter your tax ID or Social Security number with dashes, is the text box located to the right of Number

* Tax Registrations

Use this section to add all your applicable tax registrations.

1 Add Tax Registration

* Tax Registration

Country

2

Tax ID

3

Local
☐

If individual, kindly key in Social Security Number

4.) **Tax Certificate**
   a. Select your tax type (W8 or W9)
   b. Click on the blue word File
   c. Click the blue word Browse to find your copy of your W8 or W9 to upload into Coupa

* Tax Certificate

* Type

1

* Attachments
2 Add File

3 [Browse]   ×

☁ Drop files here

Submitting the Onboarding Form

1.) Once all information is completed, scroll to the bottom and click Submit for approval.

Once the Flynn team approves your account you will be able to transact with Flynn. Ensure that all information is filled out in full and correctly to avoid delays and refusals. Note that although some Information is optional, Flynn strongly recommends you fill out all of the fields for a better user experience.