

## Update Preferred Payment Method

### About this Guide

This guide is intended to show suppliers how to:

- Add/edit an existing payment method
- Update remittance address
- Update remittance email address

**Note: If you have a multifactor and legal entity currently established, begin on page 5.**

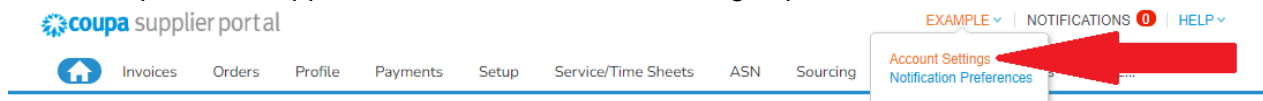
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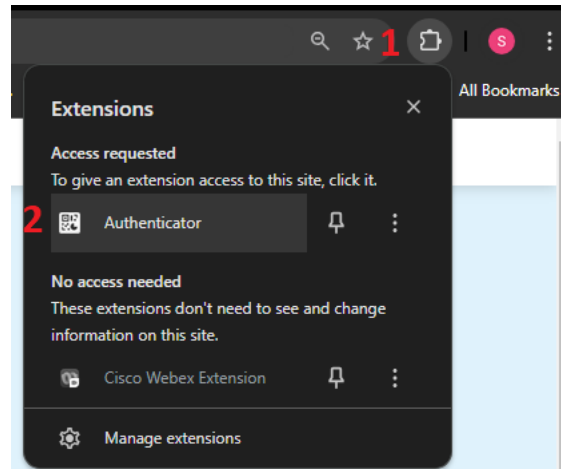
## Establish Multifactor Authentication via Authenticator App on Desktop

- 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.

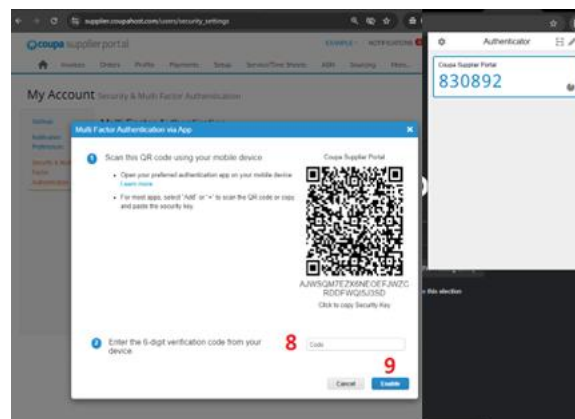


- 2.) Select the third option on the left side under My Account labeled “Security & Multi Factor Authenticator”
- 3.) Add the relevant extension to your browser:
  - a. Google Chrome extension [authenticator](#)
  - b. Microsoft Edge extension [authenticator](#)
  - c. Microsoft Edge extension [authenticator](#)
- 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 cod 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”

My Account Security & Multi Factor Authentication

The screenshot shows the 'Multi Factor Authentication' settings page. On the left is a sidebar with links: Settings, Notification Preferences, Security & Multi Factor Authentication (highlighted), and Authentication. The main content area is titled 'Multi Factor Authentication' and has two radio button options: 'For Payment Changes (Required for changing Legal Entity or Remit-To)' (selected) and 'For Both Account Access (Login) and Payment Changes'. Below these are two boxes: 'Via Authenticator App' and 'Via Text Message'. A red arrow points to the radio button next to 'Via Text Message'. Below the boxes is a section titled 'Recent Login Activity' with two entries: '10/02/24 (02:12 PM) - Chrome - Windows - 4.35.118.166' and '10/02/24 (02:08 PM) - Chrome - Windows - 4.35.118.166'.

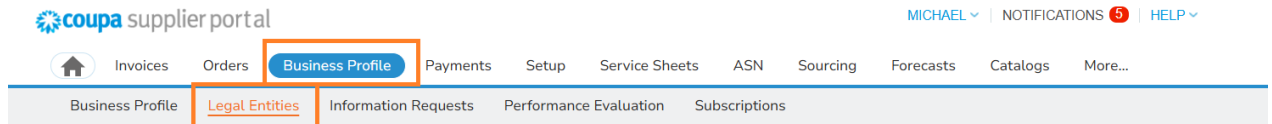
- 3.) Complete the prompts provided in descending order, once completed click enable

The screenshot shows a pop-up window titled 'Multi Factor Authentication via SMS'. It contains the following steps: 1. A code will be sent to your phone as an SMS Text Message (SMS rates may apply). 2. Confirm Recaptcha. 3. Phone Number (with a dropdown showing '+1 1234567891'). 4. A checkbox labeled 'I'm not a robot' with a reCAPTCHA logo. 5. A 'Send Code' button. 6. A text input field for the 6-digit verification code. 7. 'Cancel' and 'Enable' buttons at the bottom.

- 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”

## Establish Legal Entity

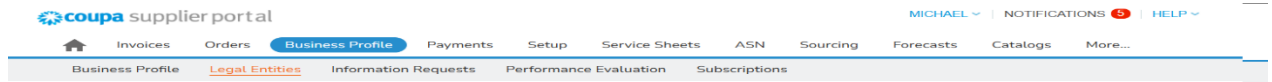
1.) Click the word Business Profile then click on Legal Entities



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



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

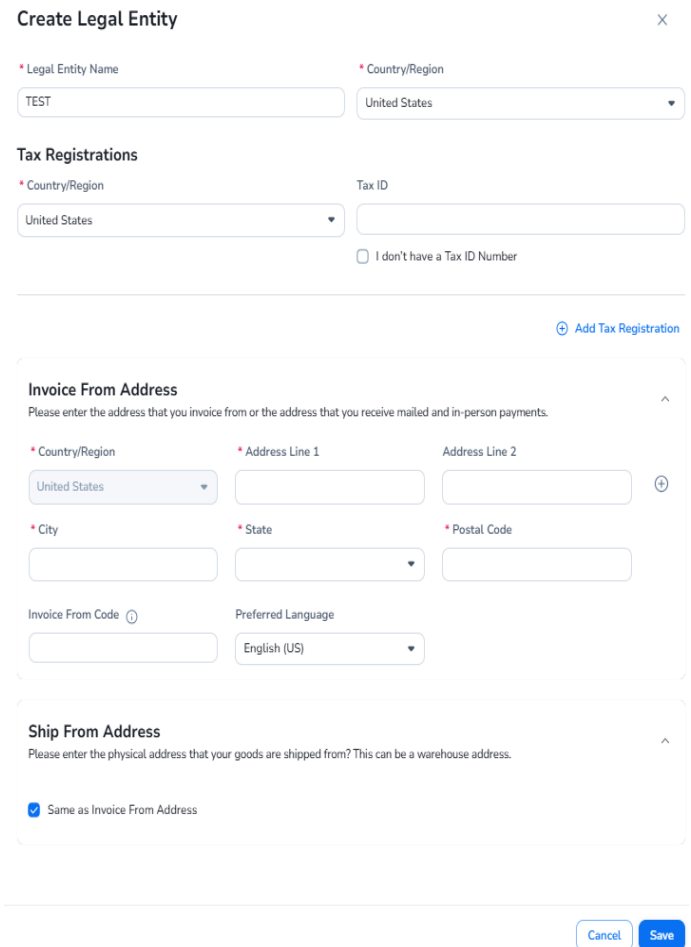
10.) Under State, from the drop down select the state the business is in

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

12.) Ensure Ship From Address check box is clicked

13.) Click Save

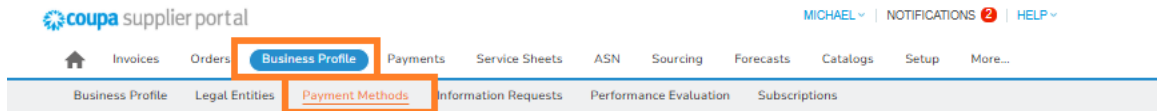
14.) A pop up message will appear where you now enter your payment information, please click on the close button



The screenshot shows the 'Create Legal Entity' form. The form includes fields for Legal Entity Name (with 'TEST' entered), Country/Region (set to 'United States'), Tax Registrations (Country/Region set to 'United States', Tax ID field, and a checkbox for 'I don't have a Tax ID Number'), Invoice From Address (Country/Region set to 'United States', Address Line 1, Address Line 2, City, State, Postal Code, Invoice From Code, and Preferred Language set to 'English (US)'), and Ship From Address (with a checkbox for 'Same as Invoice From Address'). The 'Add Tax Registration' link is visible. The 'Save' button is highlighted in blue.

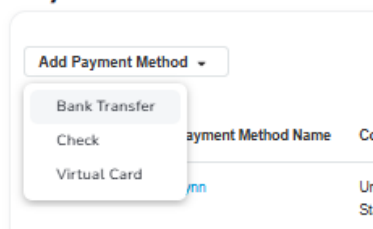
## Set Up Payment Method (Returning Coupa User)

- 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

### 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

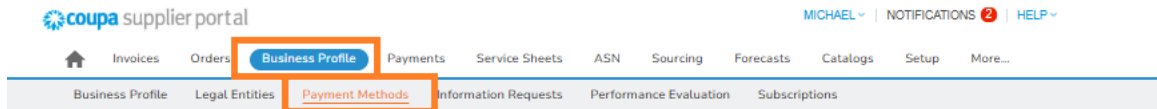
- c. For **Virtual Card (Credit Card)**
  - i. Enter the payment method name such as “Flynn Credit Card”
  - ii. Enter remittance email address under Email address
  - iii. Click Save and Next
  - iv.
- 5.) Click the check box for Flynn Group

| Customer                 | Payment for flynn                   |
|--------------------------|-------------------------------------|
| Flynn Group - John Ellis | <input type="checkbox"/>            |
| Flynn Group - EMAIL TEST | <input checked="" type="checkbox"/> |

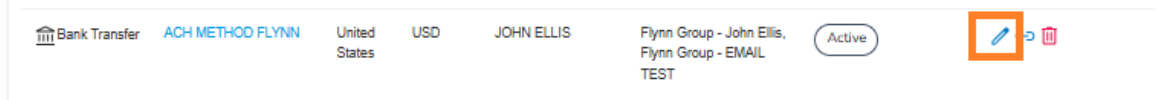
- a.
- 6.) Click Save on the bottom right and click close.

## Edit an Existing Payment Method – ACH/Credit Card

- 1.) Click the word Business Profile then click on Payment Methods



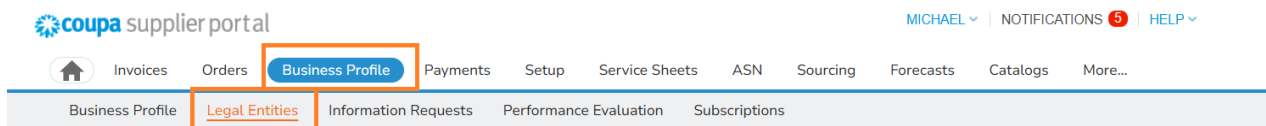
- 2.) Click on Payment Methods
- 3.) If you have your multiple authentications created, please enter the 6- digit code sent to the Authenticator App/phone number provided when you created your account or use the authenticator app and click ok.
- 4.) For ACH/Credit Card changes, find the payment method and click on the pencil icon to the right, **edit the necessary information as needed** and hit save.



- a.
  - b. If no payment methods are available, skip to page 3
- 5.) Continue to page 6

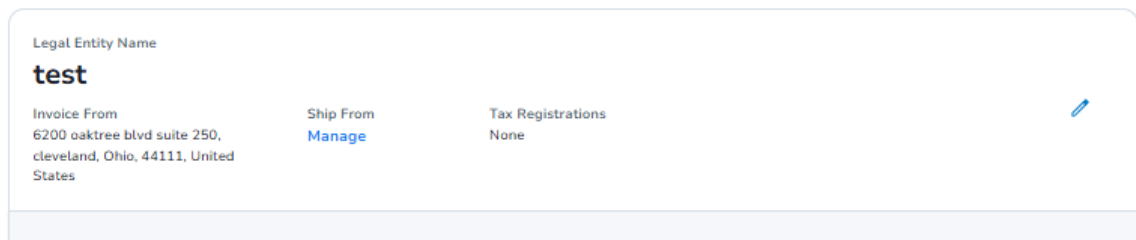
## Edit an Existing Payment Method – Check

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



- 2.) 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.
- 3.) Click on the blue text of the legal entity you wish to update the address of
  - a. If there are no legal entities, please skip to page 4
- 4.) Click on the pencil icon to the right of the existing address

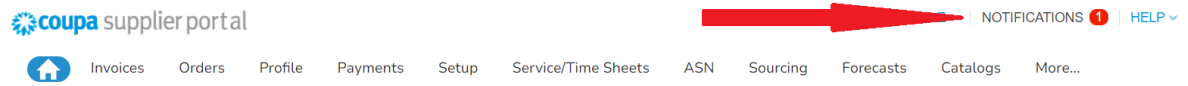
### ← Legal Entities



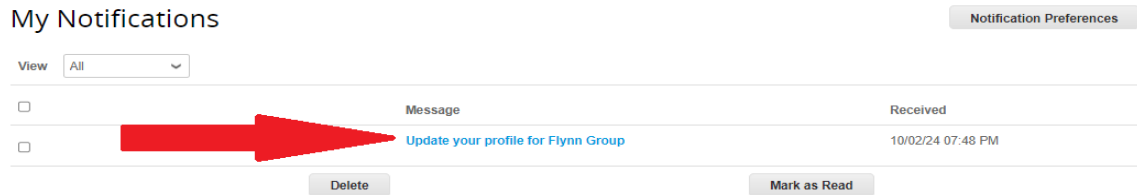
- 5.) Edit the address as needed and hit save.
- 6.) Continue to page 6

## Completing the Information Request Form: Payment Information

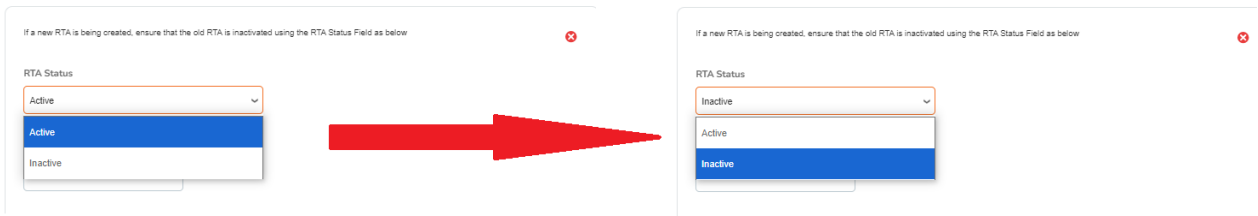
1.) Click the word Notifications in the top right corner



2.) Click on the Message in blue labeled “Update your profile for Flynn Group”



3.) Under the current RTA status change the status from active to inactive



4.) Click the Add Remit to button

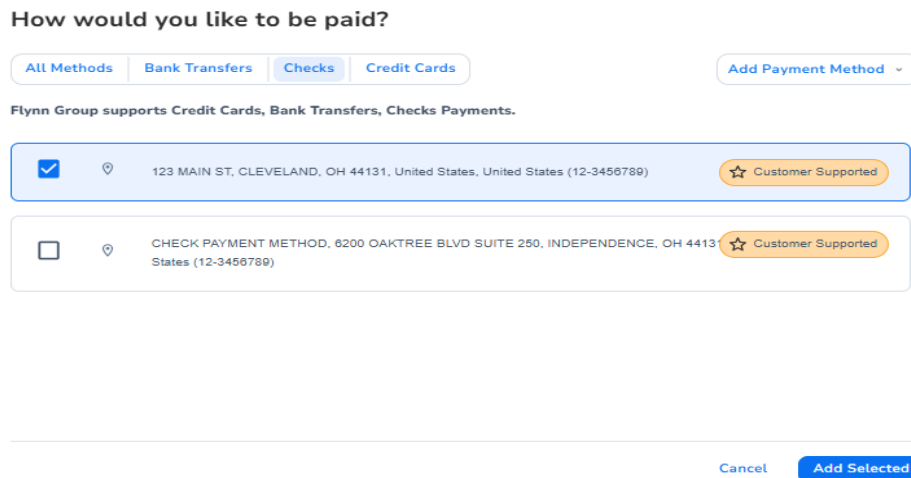
### Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

5.) Click Add Payment Method

a. If your information is already populated, click on the box to the left, till it shows as a blue checkbox and hit Add Selected



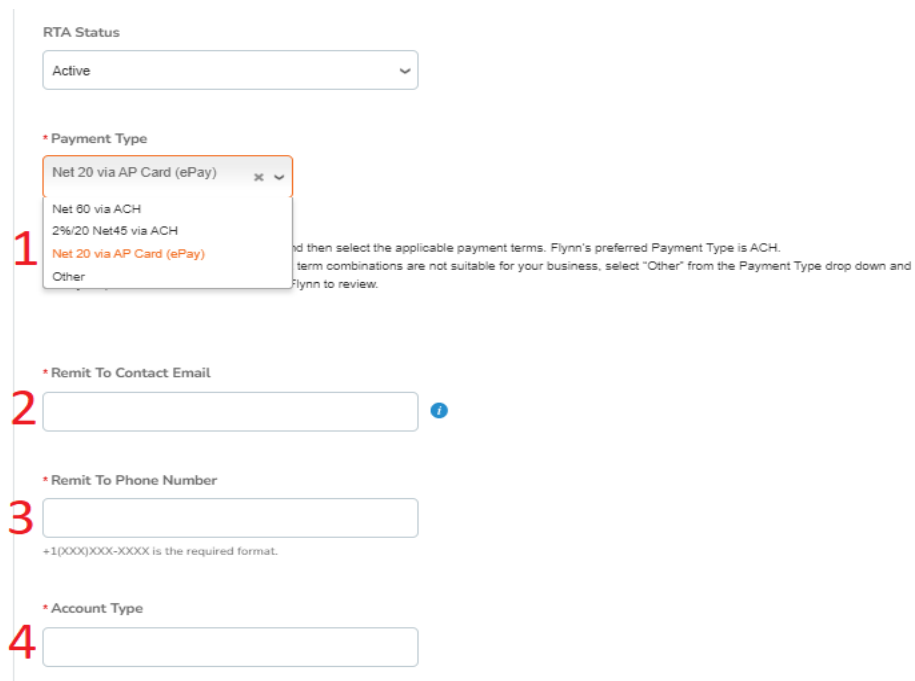
6.) Under the Remit-to Address now that a remit address has been entered, click on the drop down located under payment type:

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 valid 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 valid 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?”



The screenshot shows a web form for setting up a payment method. The form includes the following fields and annotations:

- RTA Status:** A dropdown menu with "Active" selected.
- \* Payment Type:** A dropdown menu with "Net 20 via AP Card (ePay)" selected. A red box highlights the dropdown, and a red number "1" is next to it. A tooltip is visible showing options: "Net 60 via ACH", "2%/20 Net45 via ACH", "Net 20 via AP Card (ePay)" (highlighted in orange), and "Other".
- \* Remit To Contact Email:** A text input field with a red number "2" next to it.
- \* Remit To Phone Number:** A text input field with a red number "3" next to it. Below the field, it says "+1(XXX)XXX-XXXX is the required format."
- \* Account Type:** A text input field with a red number "4" next to it.

Additional text on the right side of the form states: "and then select the applicable payment terms. Flynn's preferred Payment Type is ACH. If term combinations are not suitable for your business, select 'Other' from the Payment Type drop down and Flynn to review."

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.

\* Payment Type

Other x

Net 60 via ACH

2%/20 Net45 via ACH

Net 20 via AP Card (ePay)

Other

1

and then select the applicable payment terms. Flynn's preferred Payment Type is ACH. term combinations are not suitable for your business, select "Other" from the Payment Type drop down and Flynn to review.

\* Other Payment Method and Term

2

\* Remit To Contact Email

3

\* Remit To Phone Number

4

+1(XXX)XXX-XXXX is the required format.

\* Account Type

5

## Completing the Information Request 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 Information Request 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?”

**1** \* Add Certificate of Insurance

No

Yes

No

age as required by the state in which the work will be performed, with Statutory Limits, and Employer's Liability Insurance with minimum limit of \$1,000,00 per accident for bodily injury or disease.

If you do not have liability insurance or do not provide the requested information you may not be approved as a supplier for Flynn Group

**2** \* 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

Certificate of Insurance

\* Add Certificate of Insurance

Select

Yes

No

\* Certificate of Liability Insurance

Effective Date mm/dd/yy

\* Expiration Date mm/dd/yy

\* Attachments Add File

Description

*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 Information Request 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

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\* 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

**2** Country

**3** Tax ID

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

1 • Type

2 • Attachments

3 Add [File](#)

[Browse](#) X

Drop files here

## Submitting the Information Request Form

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

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Once the Flynn team approves your account change it will reflect on your account. 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.