

## 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

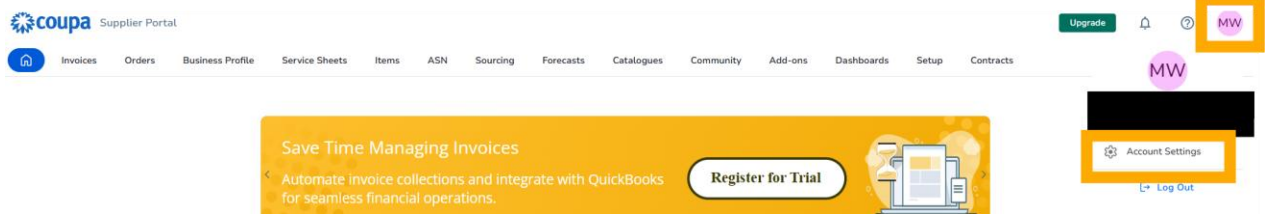
**Note: If you have a multifactor and legal entity currently established, begin on [page 8](#).**

### This guide contains the following sections:

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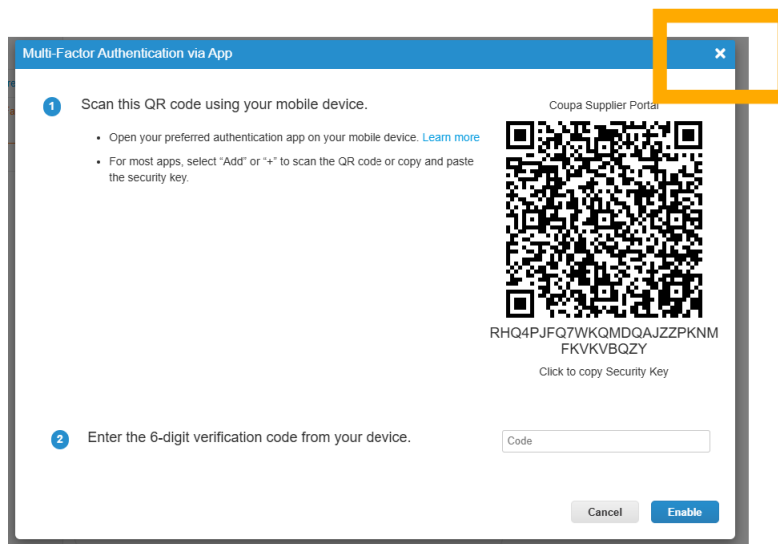
## Access Multifactor in Coupa Account

1.) Click on your initials in the top right corner, then click on Account Settings



2.) Click on Security & Multifactor Authentication


- a. You will first be prompted to complete the authentication via the App, if this is **not** your preferred method, click the X button located in the top right corner

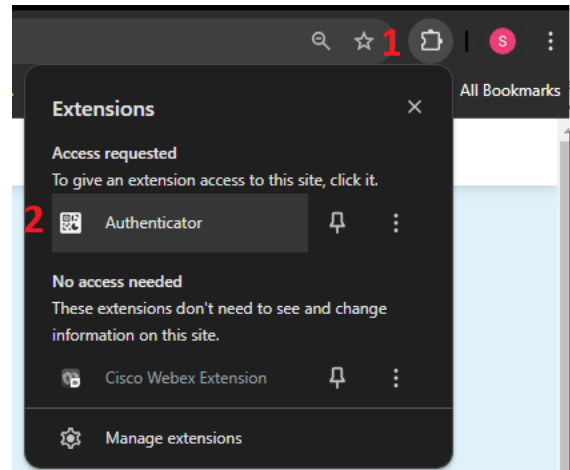


3.) You will have three options

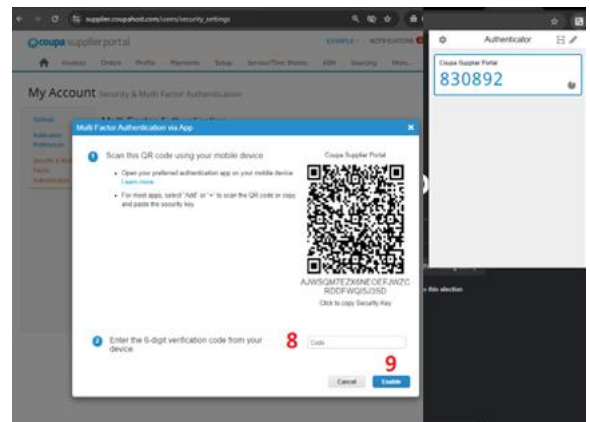
- a. [Authenticator App](#)
- b. [Text Message](#)
- c. [Passkey](#)

## Establish Multifactor Authentication via Authenticator App on Desktop

- 1.) Add the relevant extension to your browser:
  - a. Google Chrome extension [authenticator](#)
  - b. Microsoft Edge extension [authenticator](#)
  - c. Microsoft Edge extension [authenticator](#)
- 2.) In Coupa, a pop up labeled “Multifactor Authentication via App” will appear
- 3.) Copy the Security Key password shown **underneath** the QR code
- 4.) 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



- 5.) In your browser with the Authenticator App, copy the 6-digit code
- 6.) In Coupa, paste the 6-digit code in the text box to the right of step 2
- 7.) Click Enable
- 8.) A pop-up labeled “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”
- 10.) Continue on [page 8](#)



## Establish Multifactor Authentication via Text Message (SMS)

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

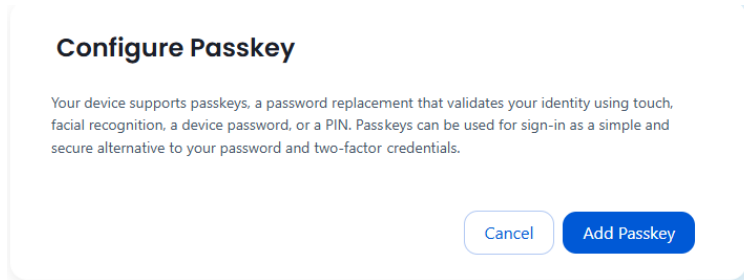
2.) A pop up label “Save Your Back Up Codes” will appear, save these via downloading or printing depending on your personal preference

3.) Click *I copied and saved the recovery codes* and click Continue or Click Download and Continue

4.) Continue on [page 8](#)

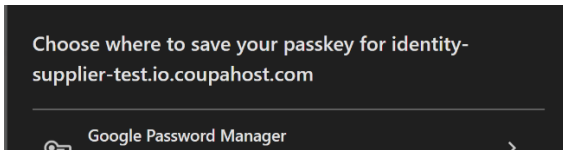
## Establish Multifactor Authentication via Passkey on Desktop

1.) Click on the Add Passkey button



2.) Based on browser you will be asked to save one of two ways:

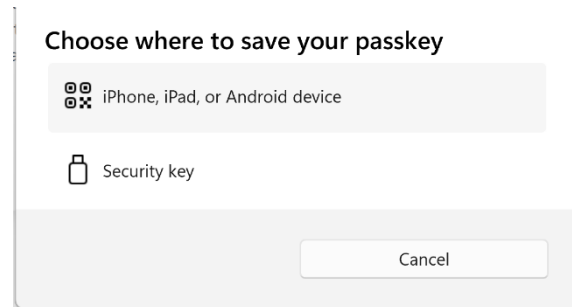
a. Browser manager (**Chrome only**)



i. On Chrome:

- A. Click Google Password Manager
- B. You will be asked Create a passkey to sign in to identify-supplier-coupa.com and hit create
- C. You will be asked to create a PIN with either 6 numbers or 4 or more letters and numbers
- D. Hit confirm

b. Use a phone, table, or security key (**other browser types**)



- i. iPhone, iPad, or Android Device
  - A. You will asked to scan QR code with phone or tablet
  - B. You will be asked use sign in using FaceID, fingerprint, or PIN code

3.) Once completed your screen will look like the below



Device connected!  
Continue on your device

1.) Continue on [page 8](#)

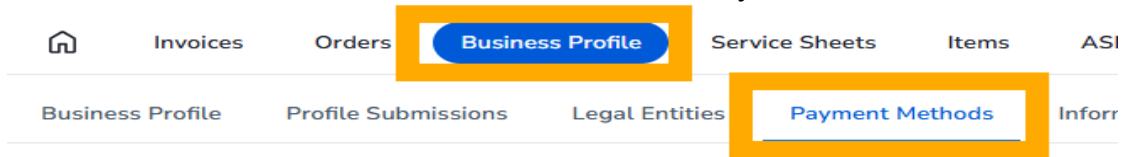
### Set Up Legal Entity (Returning Coupa User)

- 1.) Click the word Business Profile
- 2.) Opt in or opt out of sharing data with Coupa community and hit Save
- 3.) Click Legal Entities and click the Create Button
- 4.) Enter your business's legal name in the box underneath Legal Entity Name
- 5.) Click on the drop-down box located underneath Country/Region, scroll down and click on United States
- 6.) Under Tax Registration, below Country/Region, scroll down and click on United States then below Tax ID enter the business's EIN or SSN
- 7.) Under Address Line 1, enter the street address of business
- 8.) Under City, enter the city business is in
- 9.) Under State, from the drop down select the state the business is in
- 10.) Under Postal Code, enter the postal code the business is in
- 11.) Ensure Ship From Address check box is clicked
- 12.) Click Save
- 13.) A pop up message will appear where you now enter your payment information, please click on the close button

The screenshot shows the Coupa Supplier Portal interface. At the top, there are navigation tabs for Invoices, Orders, and Business Profile (highlighted with a yellow box). Below this is a section titled "Share Your Business Profile with the Coupa Community" with a "Save" button. A second navigation bar includes Business Profile, Profile Submissions, Legal Entities (highlighted with a yellow box), Payment Methods, Information Requests, and For. Below this is the "Legal Entities" section with a "Create" button (highlighted with a yellow box). The "Create Legal Entity" form includes fields for Legal Entity Name (containing "TEST"), Country/Region (dropdown menu showing "United States"), Tax Registrations (Country/Region dropdown showing "United States" and a Tax ID field), Invoice From Address (Country/Region, Address Line 1, Address Line 2, City, State, Postal Code, Invoice From Code, Preferred Language), and Ship From Address (checkbox for "Same as Invoice From Address"). At the bottom right, there are "Cancel" and "Save" buttons.

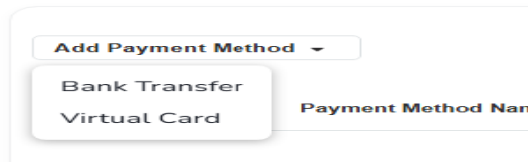
### Set Up ACH or Credit Card Payment Method (Returning Coupa User)

- 1.) If you would update check address continue to [page 8](#)
- 2.) Click the word Business Profile then click on Payment Methods



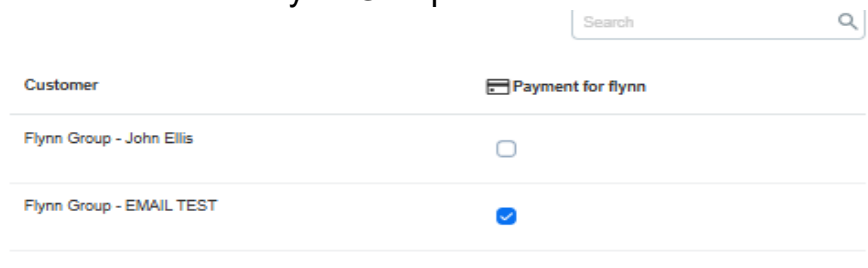
- 3.) Click on Payment Methods
- 4.) Select the option under Payment Methods

#### 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 **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

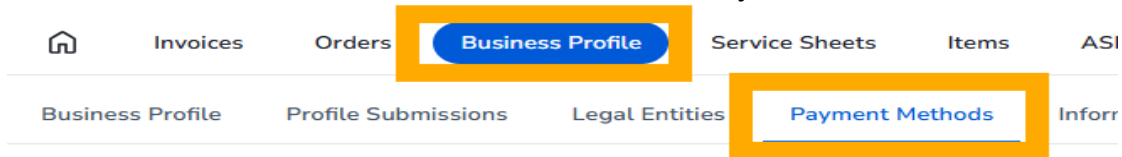
- 5.) Click the check box for Flynn Group



- a.
- 6.) Click Save on the bottom right and click close.
- 7.) Continue to [page 9](#)

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

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



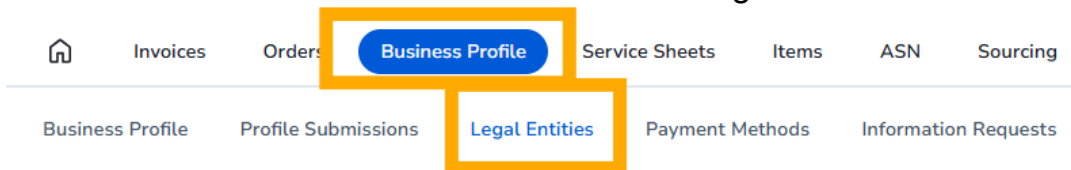
2.) For ACH/Credit Card changes, find the payment method and click on the pencil icon to the right, **edit the necessary information as needed** and hit save.



a. If no payment methods are available, skip to [page 7](#)

## Edit an Existing Payment Method – Check

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

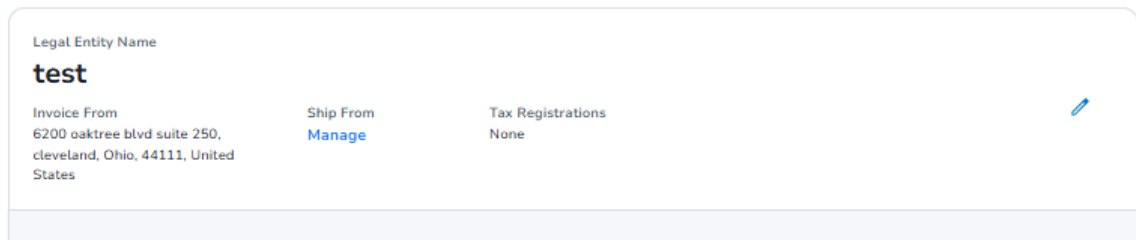


3.) Click on the blue text of the legal entity you wish to update the address of

a. If there are no legal entities, please skip to [page 6](#)

4.) Click on the pencil icon to the right of the existing address

← Legal Entities



5.) Edit the address as needed and hit save.

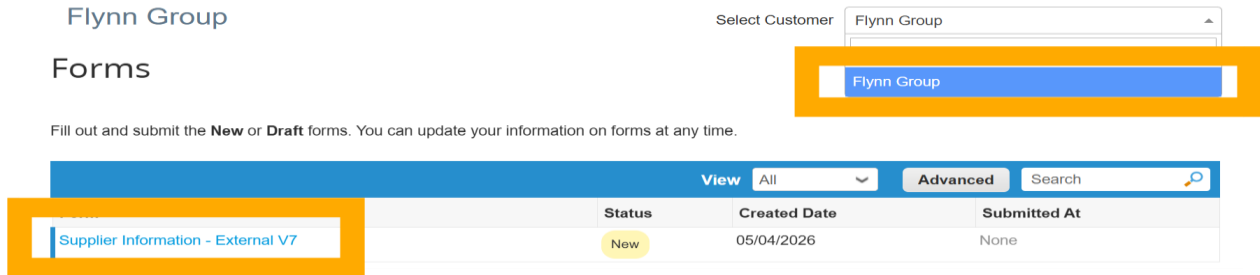
6.) Continue to [page 9](#)

## 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.

Primary Contact

Contact Purpose  
Select Some Options ⓘ

\* First Name  
1 Example

\* Last Name  
2 Vendor

\* Email address  
3 testemail@email.com ⓘ

Mobile Phone  
4 US/Canada 123-456-7890  
650-555-1212

Work Phone  
US/Canada

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

5.) Under Primary Contact enter:

- First Name of the person who will be Flynn's Point of Contact for your business
- Last Name of the person who will be Flynn's Point of Contact for your business
- Email of the person who will be Flynn's Point of Contact for your business
- Phone number of the person who will be Flynn's Point of Contact for your business
- PO Email of the person who will be Flynn's Point of Contact for your business

\* PO Email  
5 testemail@email.com ⓘ

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

## Update Preferred Payment Method

## \*Primary Address

Address Purpose  
Select Some Options ⓘ

\*Region  
Country/Region  
1

State Region  
2 Ohio - OH x v

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

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.

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

How would you like to be paid?

Flynn Group supports Credit Cards, Bank Transfers, Checks Payments.

<input checked="" type="checkbox"/>		123 MAIN ST, CLEVELAND, OH 44131, United States, United States (12-3456789)	<input type="button" value="Customer Supported"/>
<input type="checkbox"/>		CHECK PAYMENT METHOD, 6200 OAKTREE BLVD SUITE 250, INDEPENDENCE, OH 44131, United States (12-3456789)	<input type="button" value="Customer Supported"/>

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?”

## Update Preferred Payment Method

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

The screenshot shows a form for updating the preferred payment method. It includes the following fields and callouts:

- RTA Status:** A dropdown menu currently set to "Active".
- \* Payment Type:** A dropdown menu with "Net 20 via AP Card (ePay)" selected. A red callout "1" points to this dropdown. A tooltip is visible, listing options: "Net 20 via AP Card (ePay)", "Net 60 via ACH", "2%/20 Net45 via ACH", and "Other".
- \* Remit To Contact Email:** An empty text input field with a red callout "2" and an information icon.
- \* Remit To Phone Number:** An empty text input field with a red callout "3" and a note below it: "+1(XXX)XXX-XXXX is the required format."
- \* Account Type:** An empty text input field with a red callout "4".

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

## Update Preferred Payment Method

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

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 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?”

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

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

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\* Organization Type

▼

- Corporation
- Foreign Corporation
- Individual
- Foreign Individual
- Partnership
- Foreign Partnership

### 3.) Tax Registration

- c. Click Add Tax Registration
- d. Select United States from the drop down located to the right of County
- e. Enter your tax ID or Social Security number with dashes, in 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

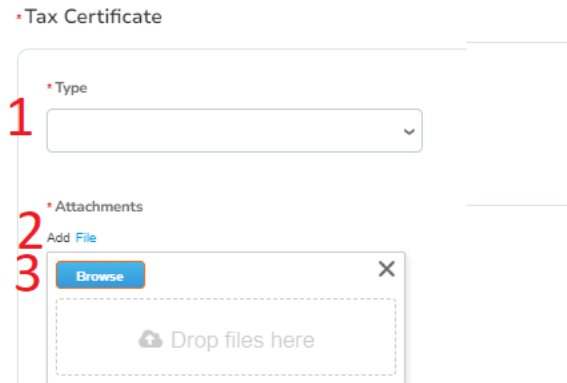
1 • Type

2 • Attachments

3 Add File

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.