



# NEW GC Bid / Pay Application Process

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Starting in January 2025

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# Introductions

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## Presenters

**Lisa Perman** – Flynn VP of Construction

**Lexi Oliver** – Flynn Procurement System Performance Administrator

## Additional Support

**Patty Wagner** – Flynn Sr Development Specialist

**Brian Innenberg** – Flynn Manager, Procurement Systems & Analytics

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# Agenda Overview

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- Overview of Coupa and What is Changing?
- Review of updated GC Bid Template / Process
- Bid Award and GC Contract – Issuance of GC PO in Coupa
- Pay Application Approval Process
- Pay Application Invoice Submittal through Coupa
- Change Order Approval and Submittal Process
- Final Retention Review
- How do you get set up in Coupa?

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# GC Bid Template - Process

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## GC Bid Template

- Required use of Flynn GC Bid Template for all project types
  - Excel file will be sent with Plans for Bid requests
- Excel file MUST be returned with Final Bids (not a PDF)
- New GC Bid Template feeds bid amounts to Payment Application

## Bid Award/Contract

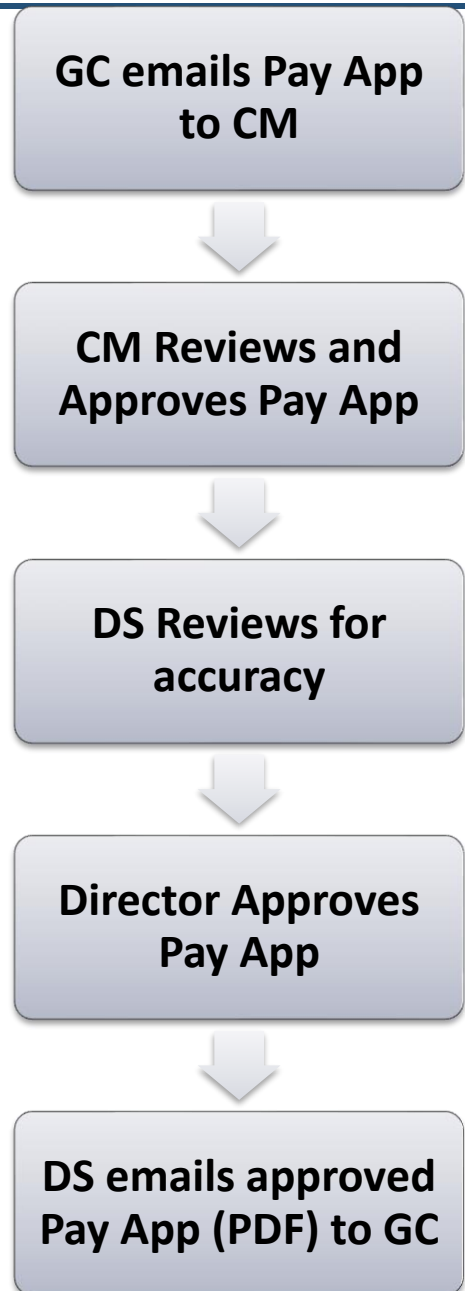
- Flynn will populate additional required data on awarded Excel Bid Form
  - Excel file will be returned to awarded GC at time of contract
  - This file will be used for all future GC Draws / Pay Applications
- Flynn will issue a PO in Coupa to the GC

[DEMO of GC Bid Template & Pay Application Form for Draws](#)

# Pay Application Approval Process

## Pay Application (GC Draw) Approval Process

- Process is similar to the existing approval process
- GC's will send completed and signed Pay Application form (as a PDF) with Lien releases to Flynn project CM/PM for review and approval via email (NOTE: WE DO NOT NEED AN EXCEL DOC)
- CM/PM will send approved Pay Applications (PDF) to the Development Specialist (DS) for review
  - DS will review Pay Application for accuracy and required Lien Releases
- Once confirmed accurate, the DS will circulate for Director of Construction's signature/approval
- Final approved Pay Application / Lien Releases will be emailed BACK to the GC (single PDF Document)
- Do **NOT** submit an invoice in Coupa until you have received the PDF of the approved Pay Application by the DS



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# Pay Application Invoicing Process

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## Pay Application Invoicing Process

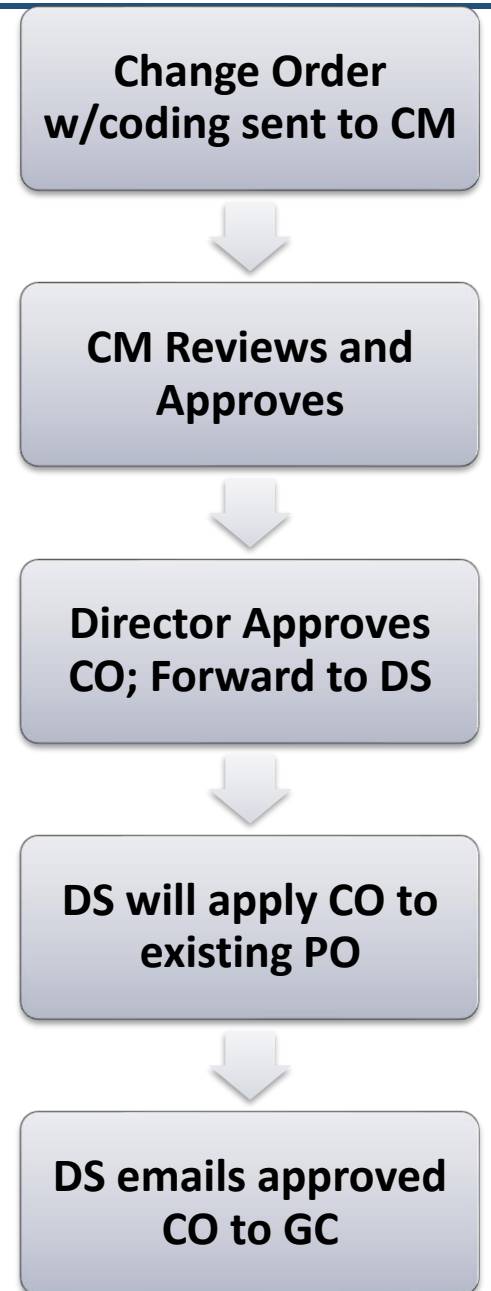
- Once the PDF of the approved Pay Application is received by the GC, the GC will generate an Invoice against the PO **IN COUPA**
  - The GC MUST attach the returned approved PDF document to the invoice in Coupa
  - Invoice MUST match the approved PDF Pay Application amounts.
- Invoice will be validated against the attached PDF by the DS
- Once DS approves the invoice match; Director of Construction will approve the invoice in Coupa for payment

[DEMO of Pay Application Invoice Process in COUPA](#)

# Change Order Process

## Change Order Process

- **NEW** Change Order Form (Excel) is required to be used [Change Order Template](#)
  - Each task must be associated to a pay request line item code (Drop down in form)
- Change Orders (PDF) to be submitted to the CM/PM for approval
  - CM/PM to validate the correct coding is being used
- CM/PM will forward approved CO to the Director of Construction for approval
- Director will forward approved CO to the Development Specialist (DS)
- **DS will apply the approved CO to the existing PO**; GC will be notified through Coupa when that is complete
  - DS will also send signed approved CO BACK to the GC for their records
- GC will **input each approved CO in the Change Order Log (Continuation Sheet)** at the bottom of the Pay Request tab as they are received as approved.



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# Final Retention Process

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## Final Retention Process

- Process is the same as the Invoice / Pay Application process
  - Only difference is using the “Retention” column on the Pay App
  - Note: Per the GC Contract; PM/CM will collect all REQUIRED documentation for closeout (e.g. signed punch list, as-builts etc) prior to Final Retention Pay Application being approved.

## [DEMO Change Order Log on Pay Application Form; Retention Columns](#)



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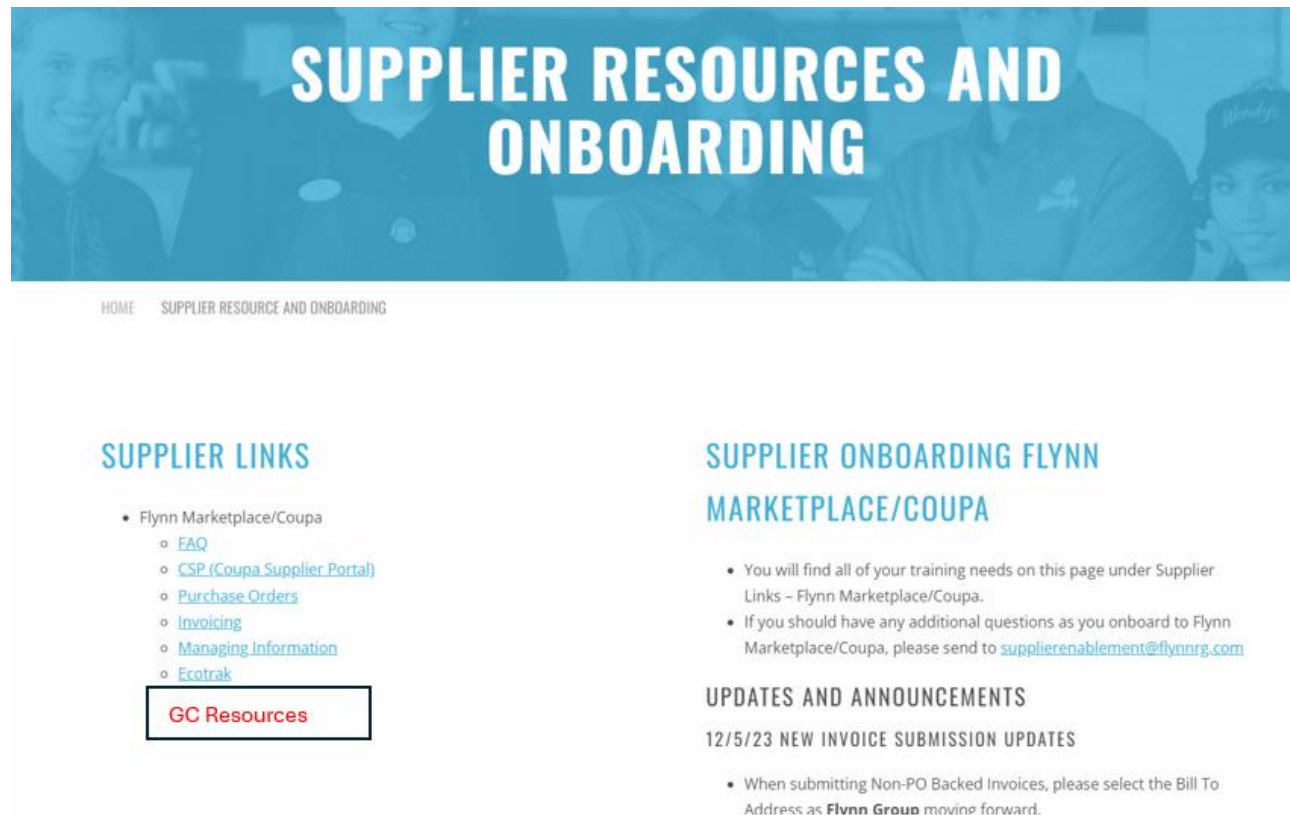
# Summary

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- Beginning with projects started in January 2025 – Pay Applications will be paid through an Invoice against a Purchase Order in Coupa
- Flynn approval process for Pay Applications and Change Orders remain fundamentally the same
- New excel files to be used for GC Bids/Pay Applications (Draw Requests) and Change Orders will be sent with EACH project bid request moving forward
- For projects already contracted or breaking ground in Jan
  - Work with your PM/CM to get new excel forms prior to 1<sup>st</sup> Draw

## Where to Find Training Materials

1. Visit the [Supplier Resource and Onboarding Site](#)
2. Select “**GC Resources**” to access this presentation along with other detailed guides



## Registering in the Coupa Supplier Portal (CSP)

1. If you are not already fully onboarded into Coupa, check your email for the portal registration invitation. If you cannot locate the email, reach out to [supplierenablement@flynnrg.com](mailto:supplierenablement@flynnrg.com).
2. Accept the invitation to begin the process
3. Create multifactor authentication and legal remit to address

### Vendor Support: Common Questions and Solutions

- If you do not receive your 6-digit verification code for account registration - please email [supplier@coupa.com](mailto:supplier@coupa.com) to have this resolved and email invoices to [acctspayable@flynnrg.com](mailto:acctspayable@flynnrg.com)
- If you need to have your multifactor reset to due to staff leaving - please email [supplier@coupa.com](mailto:supplier@coupa.com) to have this removed so you can enter a new one
- If you need your password reset, but you are NOT receiving the 6-digit verification code - please email [supplier@coupa.com](mailto:supplier@coupa.com) to have this resolved and email invoices to [acctspayable@flynnrg.com](mailto:acctspayable@flynnrg.com)
- If you cannot find Flynn Group as a customer for invoicing, please click on the drop-down next to Select Customer and select on the option label "Flynn Group"

Thank you!

