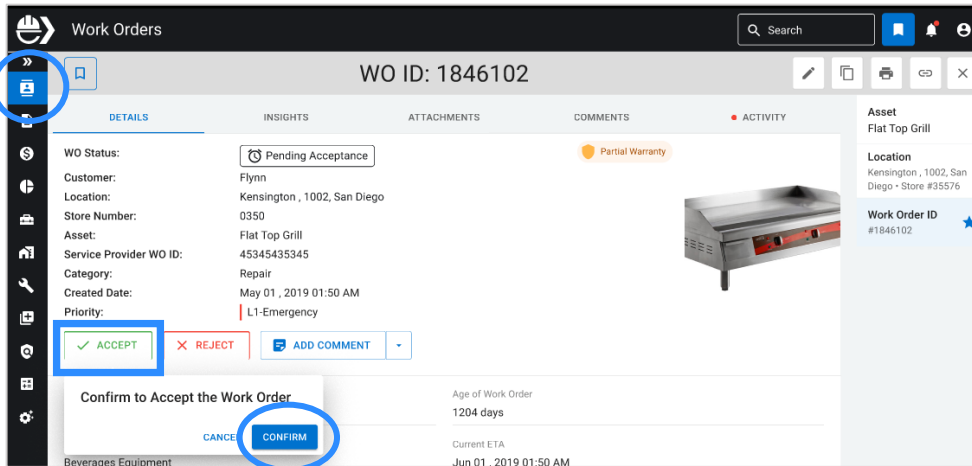




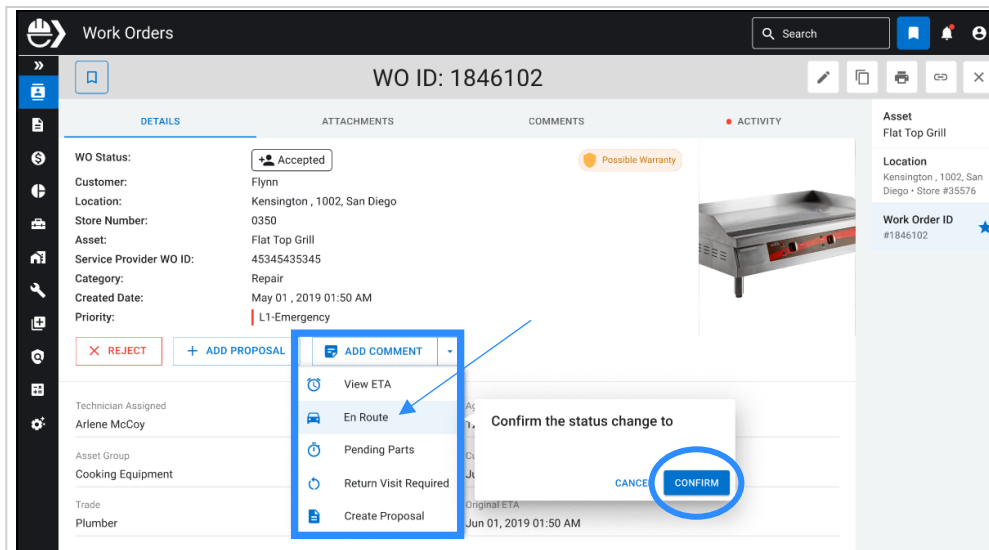
User's Guide for Service Providers

STEP 1: Accept a Work Order and Create a Proposal

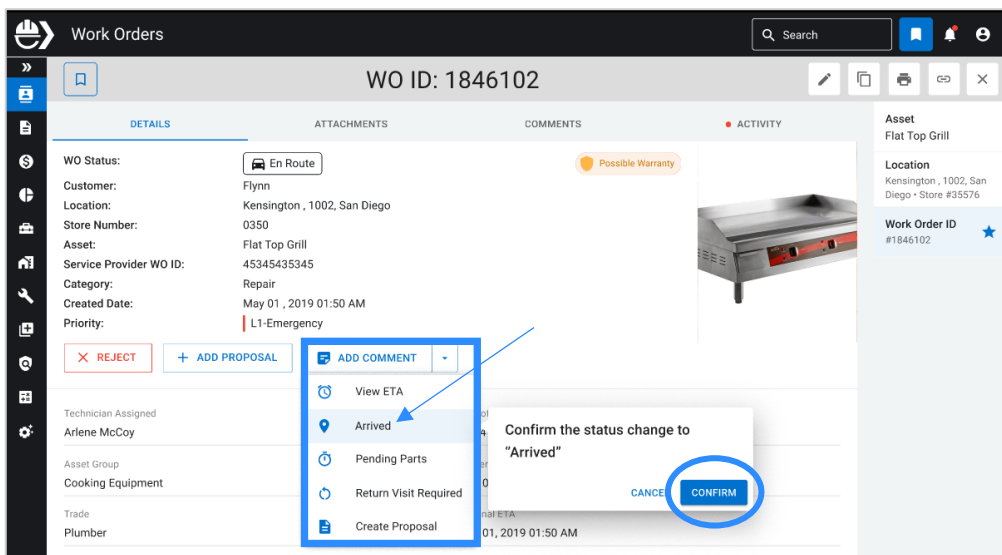
1 From Ecotrak, open the work order in the Work Orders module. Tap **Accept** to accept the work order and then select **Confirm**.



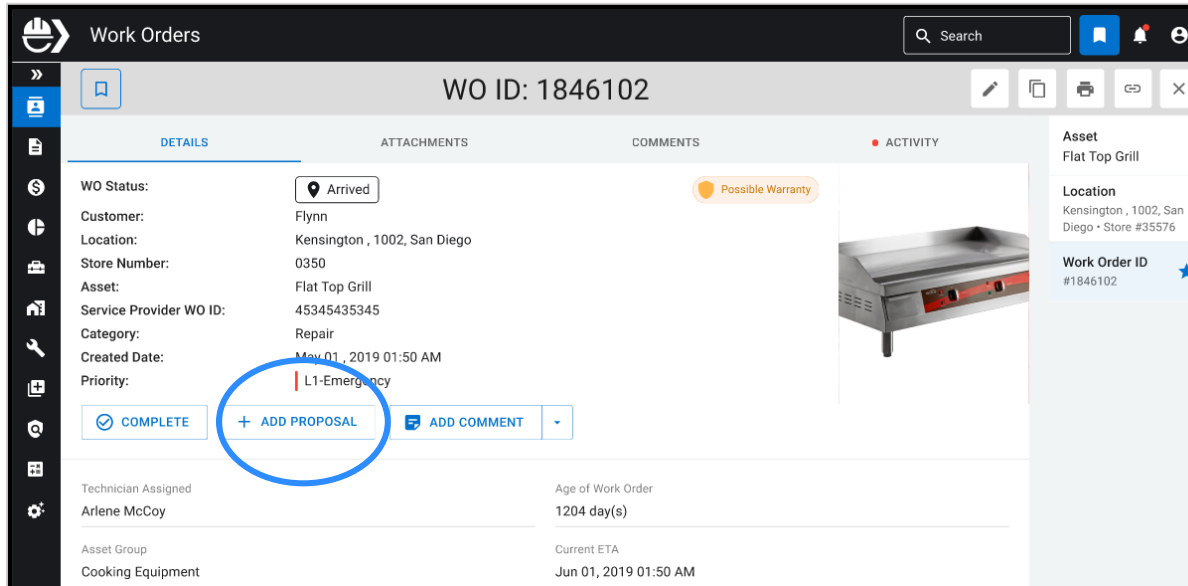
2 Let us know you are on your way by selecting **Add Comment, En Route** and then select **Confirm**.



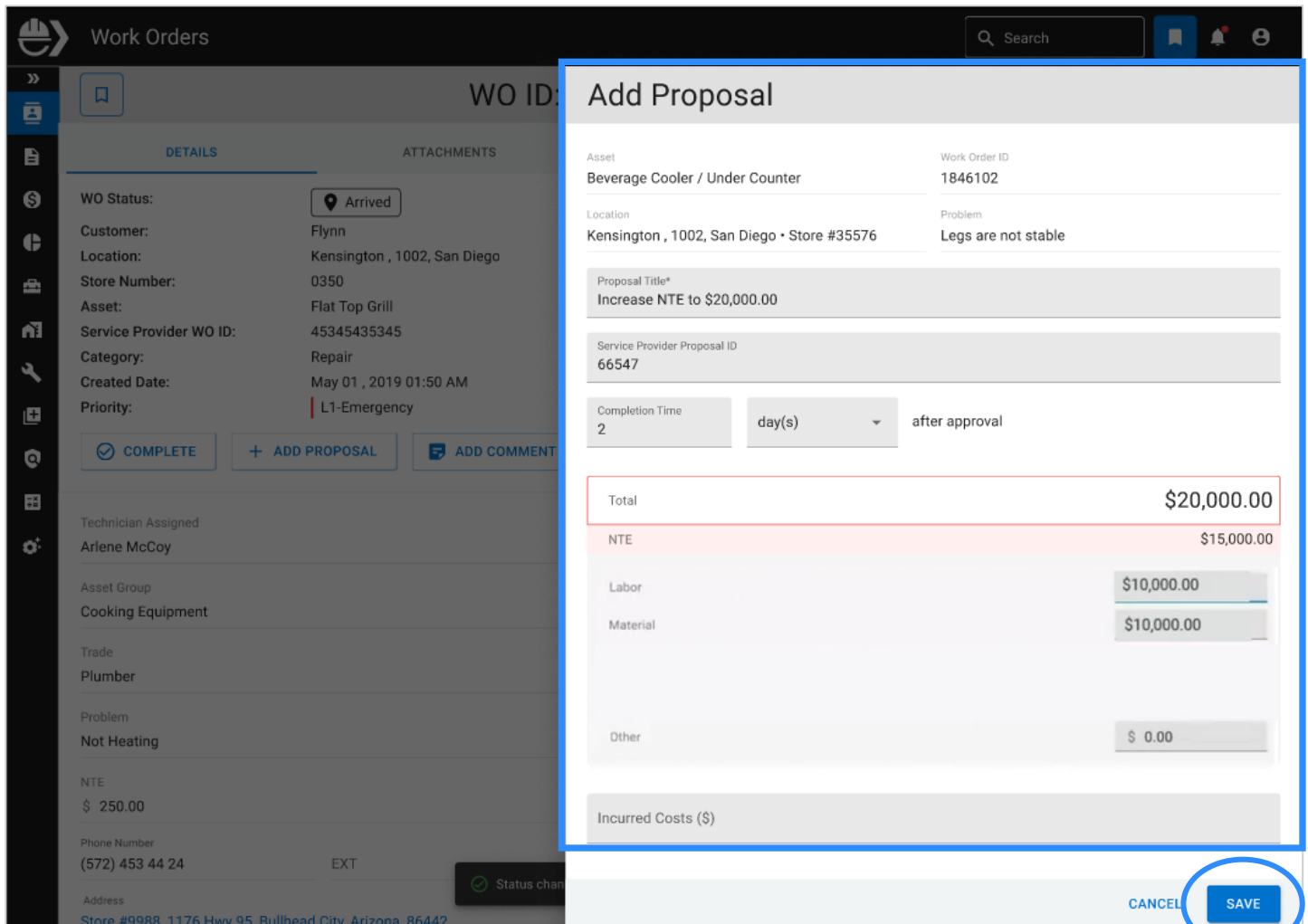
3 Let us know you arrived on-site by selecting **Add Comment, Arrived** and then select **Confirm**.



4 If Applicable, Tap **Add Proposal** in the Work Order to get started creating your proposal.

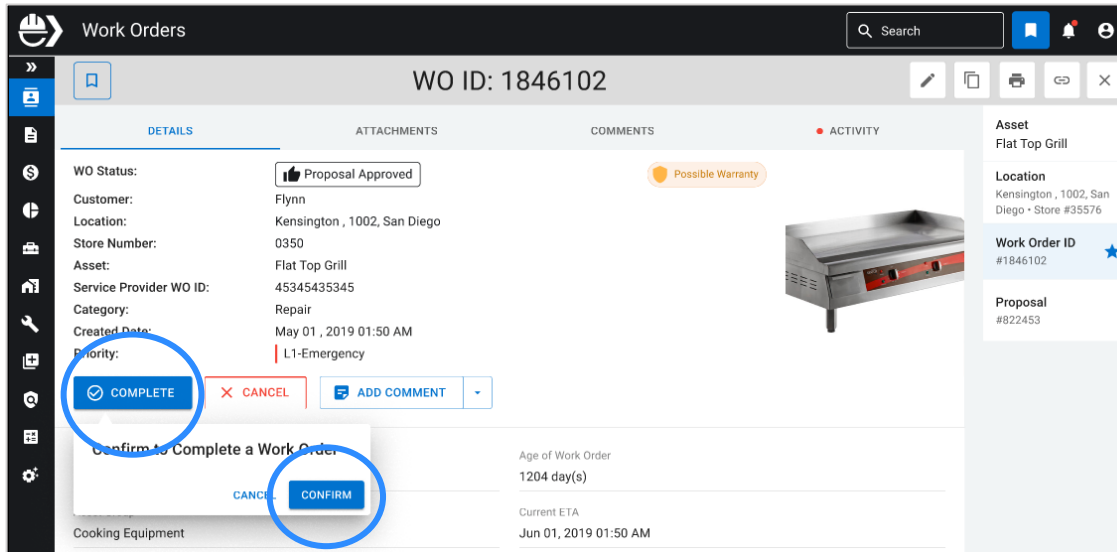


5 Fill out the proposal and tap **Save** to submit the proposal to us. The Flynn team will review the proposal and approve it if everything looks good!

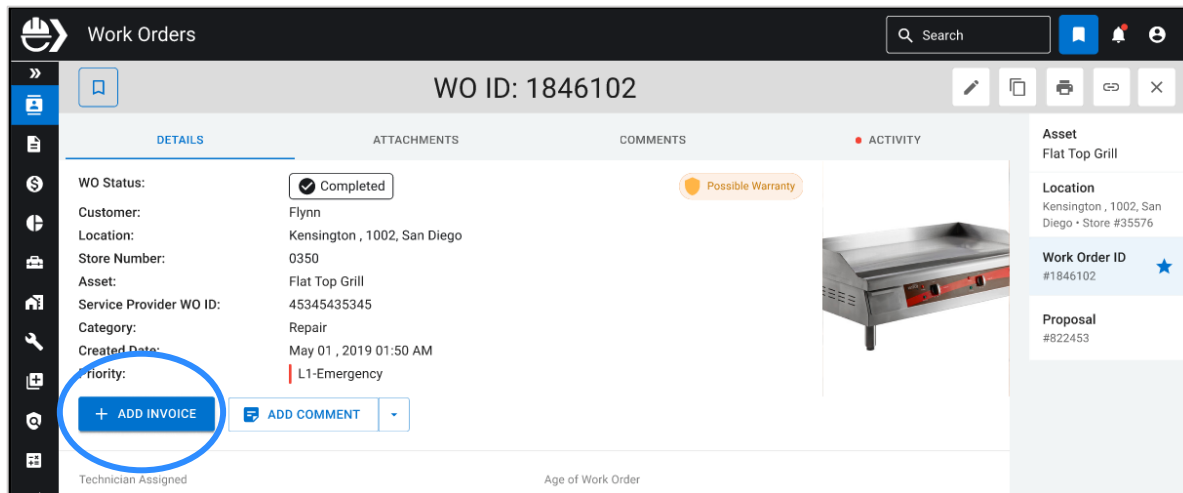


STEP 2: Create an Invoice

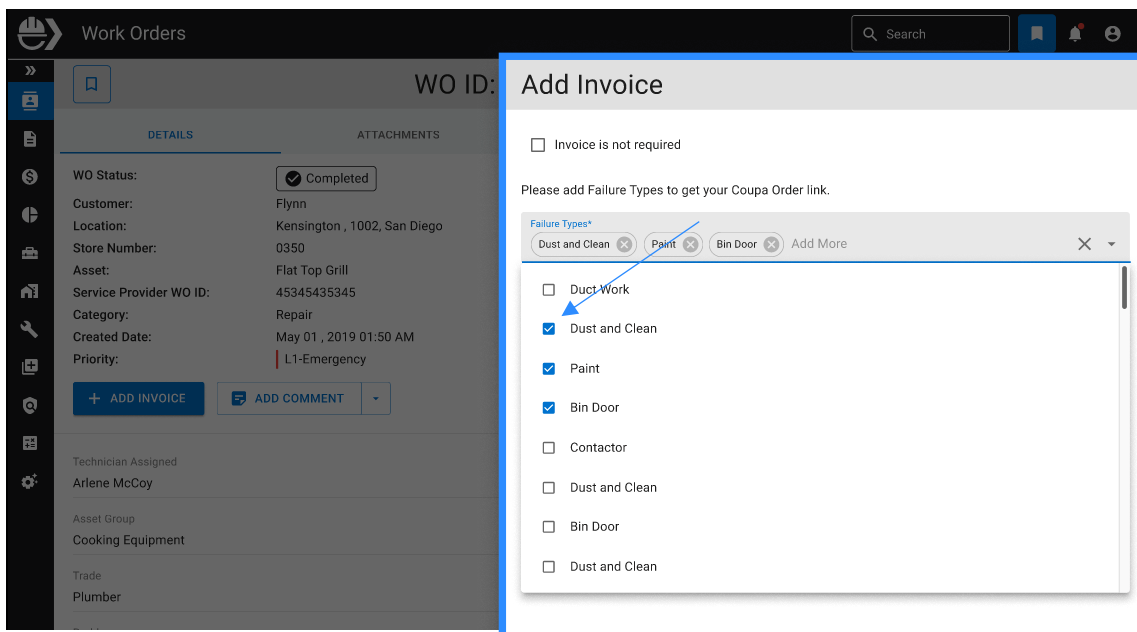
- 6 Finished with the job? Once the work order is complete, pull up the work order in Ecotrak, change the status to **Complete** and then select **Confirm**.



- 7 Tap **Add Invoice**.

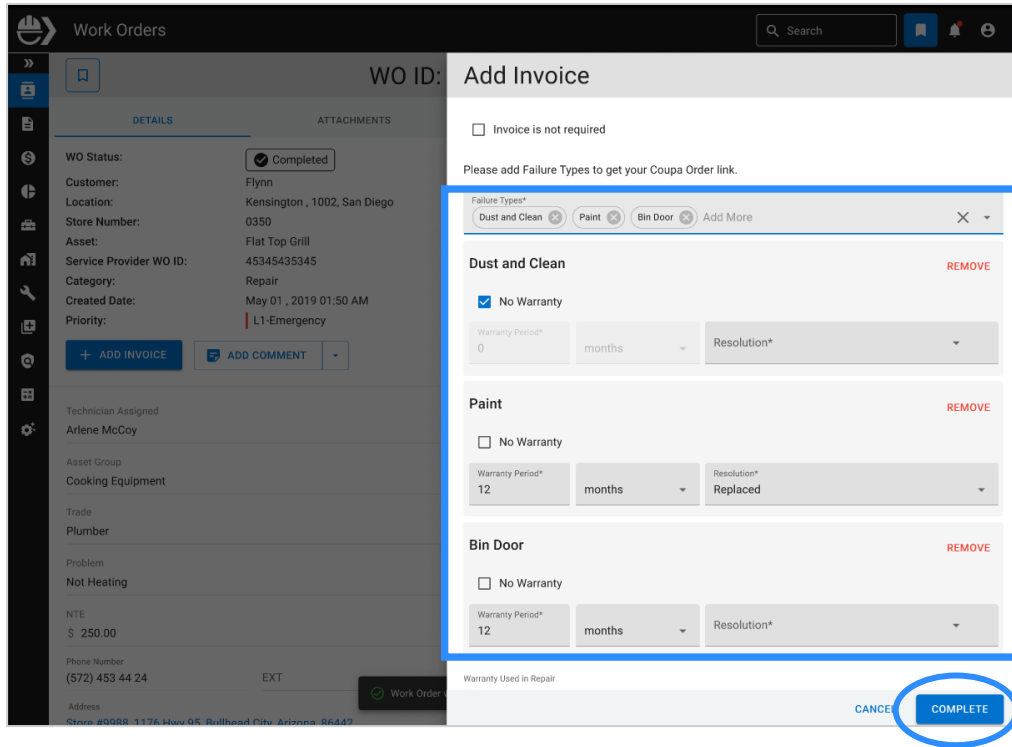


- 8 Add your **Failure Types**.

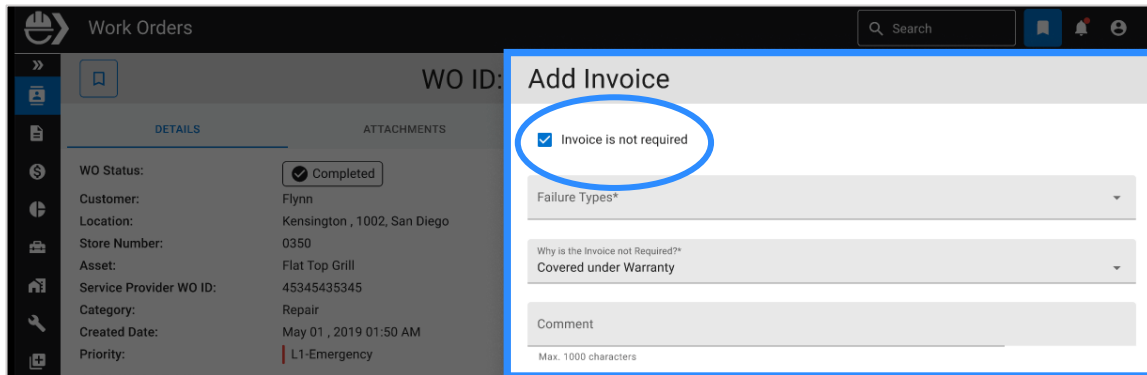


9

Add your **Resolution** and if a **Warranty** was used in the repair, then tap **Complete**.

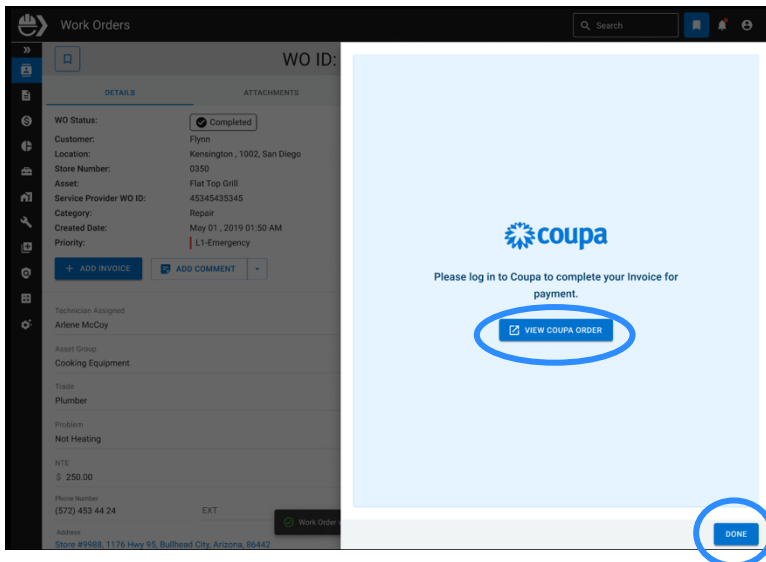


NOTE: If an invoice is not required in situations where the warranty covered the entire cost, check the “**Invoice is not Required**” box and fill out why the invoice was not required. In this case, it was covered under a warranty. You can also add comments.

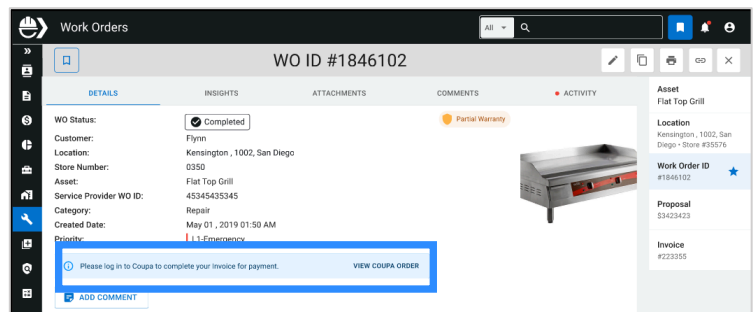


10

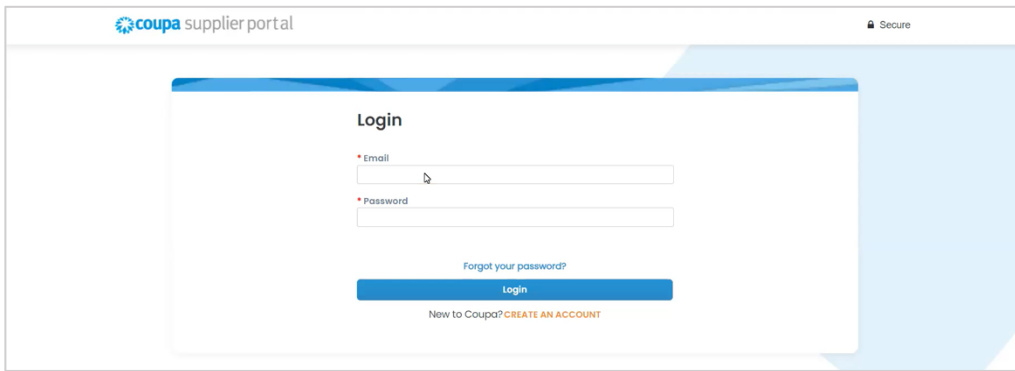
Select **View Coupa Order** to login to Coupa to complete your invoice for payment and select **Done**. You can also login on the work order too.



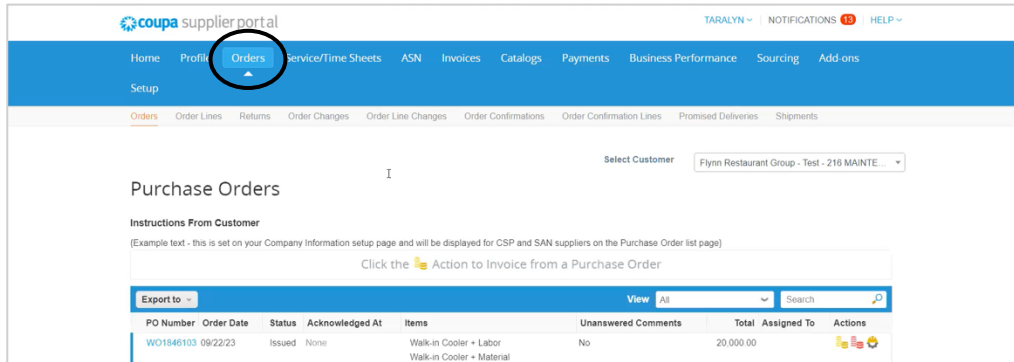
OR



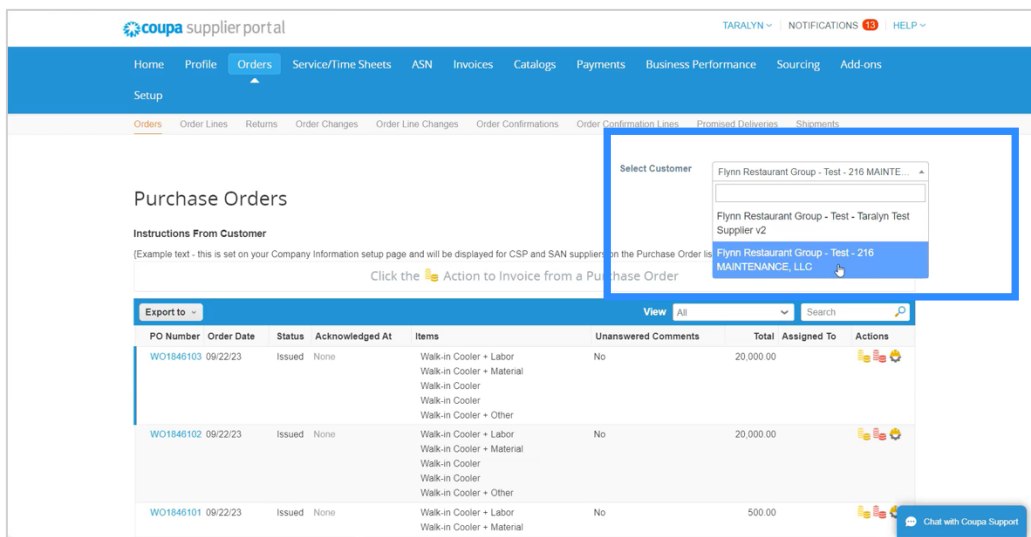
11 Login to the Coupa Supplier Portal.



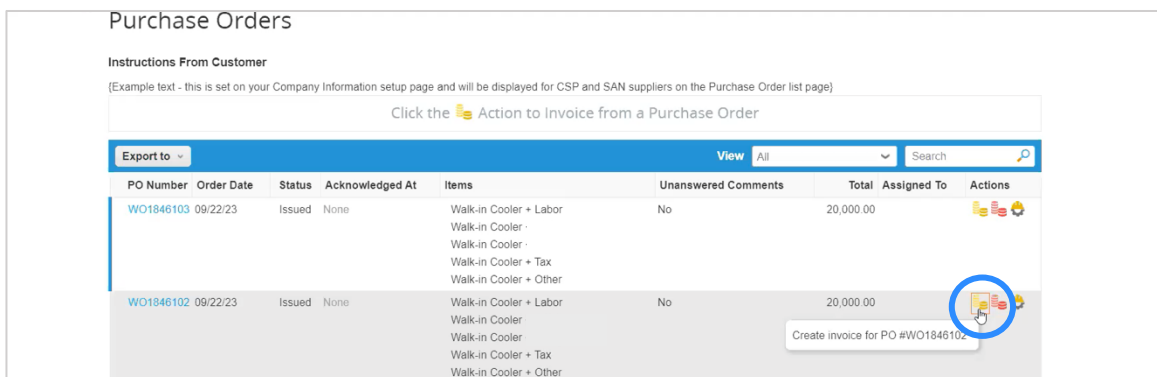
12 Select Orders from the top of the navigation.



13 Click on Select Customer to select your customer.



14 1. Find the Work Order or PO Number and select the Gold Coin Icon labeled "Create Invoice for PO #". Please note that your Work Order will become your PO number in Coupa. Note: If the amount displayed on the WO/PO line is different from the amount you invoice, you can modify it.



- 15 Under **General Info**, Add your **Invoice Number**, **Invoice Date**, **Notes** and any **Attachments**. The From and To fields will automatically populate your information from the Coupa portal.

General Info

* Invoice # ✓

* Invoice Date

Payment Term Net 14

* Currency USD

Status Draft

Supplier Note

Attachments [Add File](#) | [URL](#) | [Text](#)

From

* Supplier 216 MAINTENANCE, LLC

Supplier Tax ID

* Invoice From Address Taralyn Test Supplier
601 W MAIN AVE
SPOKANE, WA 99201
United States

* Remit-To Address No address selected

* Ship From Address No address selected

To

Customer Flynn Restaurant Group - Test

* Bill To Address Arby's
6200 oak tree blvd., Suite 250
Independence, OH 44131
United States

Ship to Address 41 W 141St
Glenpool, OK 74033
United States
Location Code: Arbys5699

- 16 When you scroll down the page, you will see all the individual line items associated with an invoice. If you are not invoicing a line, you should select the **red X**.

	Type	Description	Price	1,000.00	
		Walk-in Cooler + Mater	1,000.00		
	PO Line	Service/Time Sheet Line	Contract	Supplier Part Number	
	WO1846102-2 Clear	None	<input type="text"/>	<input type="text"/>	
	Billing	Opex-5000-L-5001051-660020-M&RRBA230001-A1300000-D017-A001			
					⋮
					⋮
	Type	Description	Price	14,000.00	
		Walk-in Cooler	14,000.00		
	PO Line	Service/Time Sheet Line	Contract	Supplier Part Number	
	WO1846102-3 Clear	None	<input type="text"/>	<input type="text"/>	
	Billing	Opex-5000-L-5001051-660020-M&RRBA230001-A1300000-D017-A002			
	Type	Description	Price	2,000.00	
		Walk-in Cooler	2,000.00		
	PO Line	Service/Time Sheet Line	Contract	Supplier Part Number	
	WO1846102-4 Clear	None	<input type="text"/>	<input type="text"/>	

- 17 Under **Totals & Taxes** you can add **Shipping, Handling, Misc and Tax** if needed. Tap **Calculate** before submitting the invoice to see the total.

The screenshot shows the 'Totals & Taxes' section of an invoice. At the top, there are three links: '+ Add Line', '+ Pick lines from PO', and '+ Pick lines from Contract'. The form contains the following fields and values:

Field	Value
Lines Net Total	20,000.00
Shipping	150.00
Handling	
Misc	
Tax	0.000 % 0.00
Total Tax	0.00
Net Total	20,150.00
Total	20,150.00

At the bottom of the form, there are five buttons: 'Delete', 'Cancel', 'Save as Draft', 'Calculate', and 'Submit'. The 'Calculate' button is circled in blue.

- 18 Select **Submit** to send to the Flynn team for proper processing, approvals, and payment. Once approved, the Coupa invoice will automatically sync in Ecotrak.

This screenshot is identical to the one above, showing the 'Totals & Taxes' form. In this version, the 'Submit' button at the bottom right is circled in blue.

Work Orders [+ CREATE SERVICE REQUEST](#)

Search

📄 🔔 👤

Invoice ID: 223355
✎ 🖨 ✕

DETAILS
SP RATES & TERMS
ATTACHMENTS
COMMENTS
ACTIVITY

Status: Paid Partial Warranty

Location: Kensington , 1002, San Diego

Store Number: 0350

Asset: Beverage Cooler / Under Counter

SP Invoice Number: 4436

Service Provider: 216 Maintenance

Category: Cap Ex

Please log in to Coupa to view your Invoice. [VIEW COUPA ORDER](#)

ADD COMMENT
VIEW APPROVAL HISTORY

Approvers Assigned
3 users


Asset Group
Refrigeration

Trade
Refrigeration Repair

Problem
Legs are not stable

Failure Types
Bin Door
Warranty Periods: 3 months
Resolution: Replaced

Door
No Warranty
Resolution: Replaced



Total	\$20,150.00
NTE	\$15,000.00
Labor	\$10,000.00
Material	\$10,000.00
Shipping	\$150.00
Tax	
Other	

Payment Method
Check

Check Number
3

Payment Date
Jun 5, 2019

Asset
Flat Top Grill

Location
Kensington , 1002, San Diego - Store #35576

Work Order ID
#1846102 ★

Proposal
\$3423423

Invoice
#223355