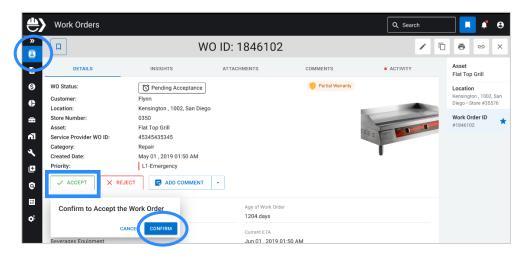


User's Guide for Service Providers



STEP 1: Accept a Work Order and Create a Proposal

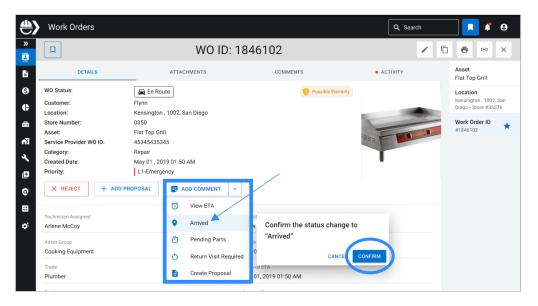
From Ecotrak, open the work order in the Work Orders module. Tap **Accept** to accept the work order and then select **Confirm**.



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

Work Orders		Q Search	🛛 🗖 🔹 Ө
	WO ID: 1846102	/	e x
DETAILS	ATTACHMENTS COMMENTS	ACTIVITY	Asset Flat Top Grill
	★ Accepted Flynn Kensington, 1002, San Diego	aible Warranty	Location Kensington , 1002, San Diego • Store #35576
Store Number: Asset:	Nation (1997) (1997) (2011) (2012) 0350 Filat Top Grill 453454353345		Work Order ID #1846102
Category: Created Date:	Repair May 01 , 2019 01:50 AM		
Priority:	L1-Emergency POSAL ADD COMMENT		
Technician Assigned	View ETA		
Arlene McCoy	En Route	hange to	
Asset Group Cooking Equipment	O Pending Parts Ct O Return Visit Required Jt		
Trade Plumber	Create Proposal Jun 01, 2019 01:50 AM		

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



#)	Work Orders			Q Search	- I I I O
≈ 11		WO ID:	1846102	/	×
Ê	DETAILS	ATTACHMENTS	COMMENTS	ACTIVITY	Asset Flat Top Grill
6) (†	WO Status: Customer: Location:	Arrived Flynn Kensington , 1002, San Diego	Possible Warranty		Location Kensington , 1002, San Diego • Store #35576
4	Store Number: Asset: Service Provider WO ID:	0350 Flat Top Grill 45345435345			Work Order ID #1846102
イ田	Category: Created Date: Priority:	Repair Moy.01, 2019 01:50 AM L1-Emerguncy		T	
0	⊘ COMPLETE + A	ADD PROPOSAL	•		
Ξ Ö	Technician Assigned Arlene McCoy		Age of Work Order 1204 day(s)		
	Asset Group Cooking Equipment		Current ETA Jun 01, 2019 01:50 AM		

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!

#>	Work Orders			Q Search	I # 0
»		WO ID:	Add Proposal		
B	DETAILS	ATTACHMENTS	Asset Beverage Cooler / Under Counter	Work Order ID 1846102	
6 C	WO Status: Customer:	Arrived Flynn	Location Kensington , 1002, San Diego • Store #35576	Problem Legs are not stable	
æ	Location: Store Number: Asset:	Kensington , 1002, San Diego 0350 Flat Top Grill	Proposal Title* Increase NTE to \$20,000.00		
ה ג	Service Provider WO ID: Category:	45345435345 Repair	Service Provider Proposal ID 66547		
Ð	Created Date: Priority:	May 01 , 2019 01:50 AM L1-Emergency	Completion Time day(s) ~	after approval	
0	⊘ COMPLETE +	ADD PROPOSAL	Total		\$20,000.00
o:	Technician Assigned Arlene McCoy		NTE		\$15,000.00
	Asset Group Cooking Equipment		Labor Material		\$10,000.00
	Trade Plumber				_
	Problem Not Heating		Other		\$ 0.00
	NTE \$ 250.00		Incurred Costs (\$)		
	Phone Number (572) 453 44 24	EXT 🔗 Status chan			
	Address Store #9988, 1176 Hwy 95, Bu				CANCEL

STEP 2: Create an Invoice



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**.

# >	Work Orders			Q Search	- I 🖡 😖
»		WO ID	: 1846102	/	×
B	DETAILS	ATTACHMENTS	COMMENTS	ACTIVITY	Asset Flat Top Grill
6) (†	WO Status: Customer: Location:	I Proposal Approved Flynn Kensington , 1002, San Diego	Possible Warranty		Location Kensington , 1002, San Diego • Store #35576
<u>a</u>	Store Number: Asset:	0350 Flat Top Grill		E CO	Work Order ID #1846102
1 1	Service Provider WO ID: Category: Created Data	45345435345 Repair May 01 , 2019 01:50 AM		148	Proposal #822453
₽	COMPLETE	CANCEL S ADD COMMENT -]		
	confirm to Comple	te a Work Order	Age of Work Order		
¢;	Cooking Equipment	CANCE. CONFIRM	1204 day(s) Current ETA Jun 01, 2019 01:50 AM		

Tap **Add Invoice**.

	Work Orders			Q Search	
»		WO ID: 1	846102	/) .
È	DETAILS	ATTACHMENTS	COMMENTS	ACTIVITY	Asset Flat Top Grill
6) (†	WO Status: Customer:	Completed Flynn	Possible Warranty		Location Kensington , 1002, San Diego • Store #35576
÷	Location: Store Number: Asset:	Kensington , 1002, San Diego 0350 Flat Top Grill			Work Order ID #1846102
۳ بر	Service Provider WO ID: Category: Created Date:	45345435345 Repair May 01 , 2019 01:50 AM			Proposal #822453
0	+ ADD INVOICE	L1-Emergency			
€. ₽	Technician Assigned		Age of Work Order		

8

7

Add your Failure Types.

	Work Orders		Q. Search 🖉 🇳 😝
»		WO ID:	Add Invoice
B	DETAILS	ATTACHMENTS	Invoice is not required
6 6	WO Status: Customer:	Completed Flynn	Please add Failure Types to get your Coupa Order link.
÷	Location: Store Number:	Kensington , 1002, San Diego 0350	Failure Types* Dust and Clean (S) Paint (S) Bin Door (S) Add More X •
۲ ۰	Asset: Service Provider WO ID: Category:	Flat Top Grill 45345435345 Repair	Duet/Work
∢ ⊡	Created Date: Priority:	May 01 , 2019 01:50 AM L1-Emergency	 Dust and Clean Paint
0	+ ADD INVOICE	ADD COMMENT +	 Bin Door
₽	Technician Assigned		Contactor
¢.	Arlene McCoy Asset Group		Dust and Clean
	Cooking Equipment		Bin Door Dust and Clean
	Trade Plumber		



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

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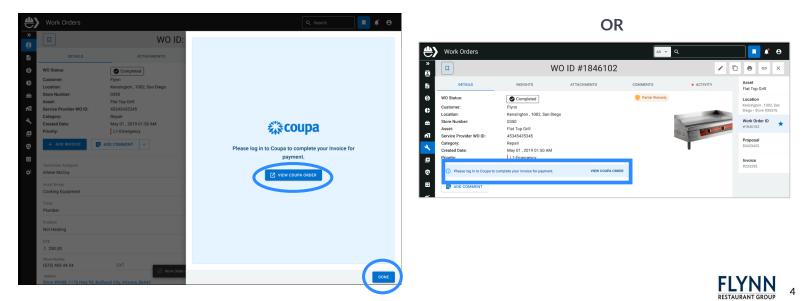
10

	Work Orders		Q. Search
»	D	WO ID:	Add Invoice
B	DETAILS	ATTACHMENTS	Invoice is not required
0	WO Status: Customer:	Completed Flynn	Please add Failure Types to get your Coupa Order link.
¢ æ	Location: Store Number:	Kensington , 1002, San Diego 0350	Failure Types* Dust and Clean (2010) Paint (2010) Add More X *
Ē	Asset: Service Provider WO ID:	Flat Top Grill 45345435345	Dust and Clean REMOVE
×.	Category: Created Date:	Repair May 01 , 2019 01:50 AM L1-Emergency	No Warranty
∎ 0	Priority: + ADD INVOICE	ADD COMMENT +	Warranty Period* 0 months - Resolution* -
₿	Technician Assigned		Paint REMOVE
Ø.	Arlene McCoy		No Warranty
	Asset Group Cooking Equipment		Warranty Period* Resolution* 12 months * Replaced *
	Trade Plumber		
	Problem Not Heating		Bin Door REMOVE
	NTE \$ 250.00		Warranty Period* 12 months Resolution*
	5 250.00 Phone Number (572) 453 44 24	EXT	Warranty Used in Repar
	(572) 453 44 24 Address Store #9988, 1176 Hwy 9	🖉 Work Order v	warranny useo in kepaar

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.

	Work Orders		Q Search		¢.	θ
×	Q	WO ID:	Add Invoice			
Ē	DETAILS	ATTACHMENTS	Invoice is not required			
6	WO Status:	Completed				
¢	Customer: Location:	Flynn Kensington , 1002, San Diego	Failure Types*			*
6 7	Store Number: Asset:	0350 Flat Top Grill	Why is the Invoice not Required?* Covered under Warranty			•
A.	Service Provider WO ID: Category: Created Date:	45345435345 Repair May 01 , 2019 01:50 AM	Comment			
ø	Priority:	L1-Emergency	Max. 1000 characters	_		

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.



🕋 coupa supp	lierportal	Secure
	Login	
	• Email	
	Password	
	Forgot your password?	
	Login New to Coupa?CREATE AN ACCOUNT	

14

Select **Orders** from the top of the navigation.

coupa supplier port al		TARALYN ~ NOTIFICATIONS 13 HELP ~
Setup		
Orders Order Lines Returns Order Changes Order Line	Changes Order Confirmations Order Confirm	rmation Lines Promised Deliveries Shipments
	St	elect Customer Flynn Restaurant Group - Test - 216 MAINTE *
Purchase Orders		
Instructions From Customer		
Example text - this is set on your Company Information setup page and	s will be displayed for CSP and SAN suppliers on th	he Purchase Order list page}
Click the	le Action to Invoice from a Purcha	ase Order
Export to ~		View All - Search O
PO Number Order Date Status Acknowledged At It	ems Unansw	wered Comments Total Assigned To Actions
	Walk-in Cooler + Labor No Walk-in Cooler + Material	20,000.00

13 Click on **Select Customer** to select your customer.

coupa supplier por	tal			TARALYN ~ NOTIFICATIO	HELP
Home Profile Order	s Service/Time Sheets		Payments Business Perf		Add-ons
Orders Order Lines Retu	ms Order Changes Orde	er Line Changes Order Confirmations	Order Confirmation Lines Pro	mised Deliveries Shipments	
			Select Customer	Flynn Restaurant Group - Test	- 216 MAINTE
Purchase Orde				Flynn Restaurant Group - Te: Supplier v2	st - Taralyn Test
(Example text - this is set on you		age and will be displayed for CSP and SA	N suppliers on the Purchase Order lis	Flynn Restaurant Group - Te	st - 216
(Example text - this is set on you	r Company Information setup p	age and will be displayed for CSP and SA k the 늘 Action to Invoice fro		Flynn Restaurant Group - Te MAINTENANCE, LLC	
(Example text - this is set on you Export to ~	r Company Information setup p				
	r Company Information setup p	k the 🧤 Action to Invoice fro	om a Pui chase Order	MAINTENANCE, LLC	
Export to 👻	r Company Information setup p Clicl	k the 🧤 Action to Invoice fro	om a Pui thase Order View All	MAINTENANCE, LLC	ر م
Export to ~ PO Number Order Date	r Company Information setup pr Clici Status Acknowledged At	k the Sea Action to Invoice fro	om a Puri hase Order View All Unanswered Comments	MAINTENANCE, LLC Search Total Assigned To	Actions

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.

Description of Oral									
Purchase Orders									
Instructions From Custome	nstructions From Customer								
{Example text - this is set on yo	ample text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)								
	Click the ≒ Action to Invoice from a Purchase Order								
						_			
Export to 🗸				View All	 Search 	₽			
PO Number Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total Assigned To	Actions			
WO1846103 09/22/23	Issued	None	Walk-in Cooler + Labor Walk-in Cooler · Walk-in Cooler · Walk-in Cooler + Tax Walk-in Cooler + Other	No	20,000.00				
WO1846102 09/22/23	Issued	None	Walk-in Cooler + Labor Walk-in Cooler Walk-in Cooler Walk-in Cooler + Tax Walk-in Cooler + Other	No	20,000.00 Create invoice for PO #WO184610				



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.

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General Info	💡 From		
* Invoice # 216TEST	* Supplier	216 MAINTENANCE, LLC	N
* Invoice Date 09/01/23	Supplier Tax ID	~	Ç₂
Payment Term Net 14	* Invoice From Address	Taralyn Test Supplier 🔎 601 W MAIN AVE	
* Currency USD		SPOKANE, WA 99201	
Status Draft		United States	
Supplier Note	* Remit-To Address	No address selected	
	* Ship From Address	No address selected	
Attachments Add File URL Text	🤗 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	

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**.

PO Line WO1846102-2	Walk-in Cooler + M	ater	1,000.00	1,000.00
	O Clear	Service/Time Sheet Line None	e Contract	Supplier Part Number
Billing Opex-5000-L-50	001051-660020-M&F	RBA230001-A1300000-D017	7-A001	
4	Description Walk-in Cooler	Pri	ice 14,000.00	14,000.00
PO Line WO1846102-3	O Clear	Service/Time Sheet Line None	e Contract	Supplier Part Number
Billing Opex-5000-L-50	001051-660020-M&F	RBA230001-A1300000-D017	7-A002	
	Description	Ρ	rice	2,000.00
	Walk-in Cooler		2,000.00	2,000.00

<u>FLYNN</u>

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Add Line	Pick lines from PO	Pick lines from Contract	Totals & Taxes	
			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	್ಧ20,150.00
		C	elete Cancel	Save as Draft Calculate Submit

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.

Add Line	• Pick lines from PO	Pick lines from Contract	Totals & Taxes	
			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	್ಧ20,150.00
		De	Cancel	Save as Draft Calculate Submit



e>	Work Orders	+ CREATE SERVICE REQUEST			Q Search		
»			Invoice ID: 223	355		∕ ē ×	
E .	DETAILS	SP RATES & TERMS	ATTACHMENTS	COMMENTS	ACTIVITY	Asset Flat Top Grill	
	Store Number: Asset: SP Invoice Number: Service Provider:	S Paid Kensington , 1002, San Diego 0350 Beverage Cooler / Under Counter 4436 216 Maintenance Cap Ex		Partial Warranty		Location Kensington , 1002, San Diego + Store #35576 Work Order ID #1846102	
√ <u>∎</u> © ⊞	Please log in to Con ADD COMMENT	upa to view your invoice.	VIEW COUPA ORDER			\$3423423 Invoice #223355	
6 ;	3 users Asset Group Refrigeration Trade		Total NTE Labor		\$20,150.00 \$15,000.00 \$10,000.00		
	Refrigeration Repair Problem Legs are not stable		Material Shipping Tax Other		\$10,000.00 \$150.00		
	Falure Types Bin Door Warranty Periods: 3 i Resolution: Replaced Door No Warranty Resolution: Replaced	1	Payment Method Check Check Number 3 Payment Date Jun 5, 2019				

