A blue and white logo

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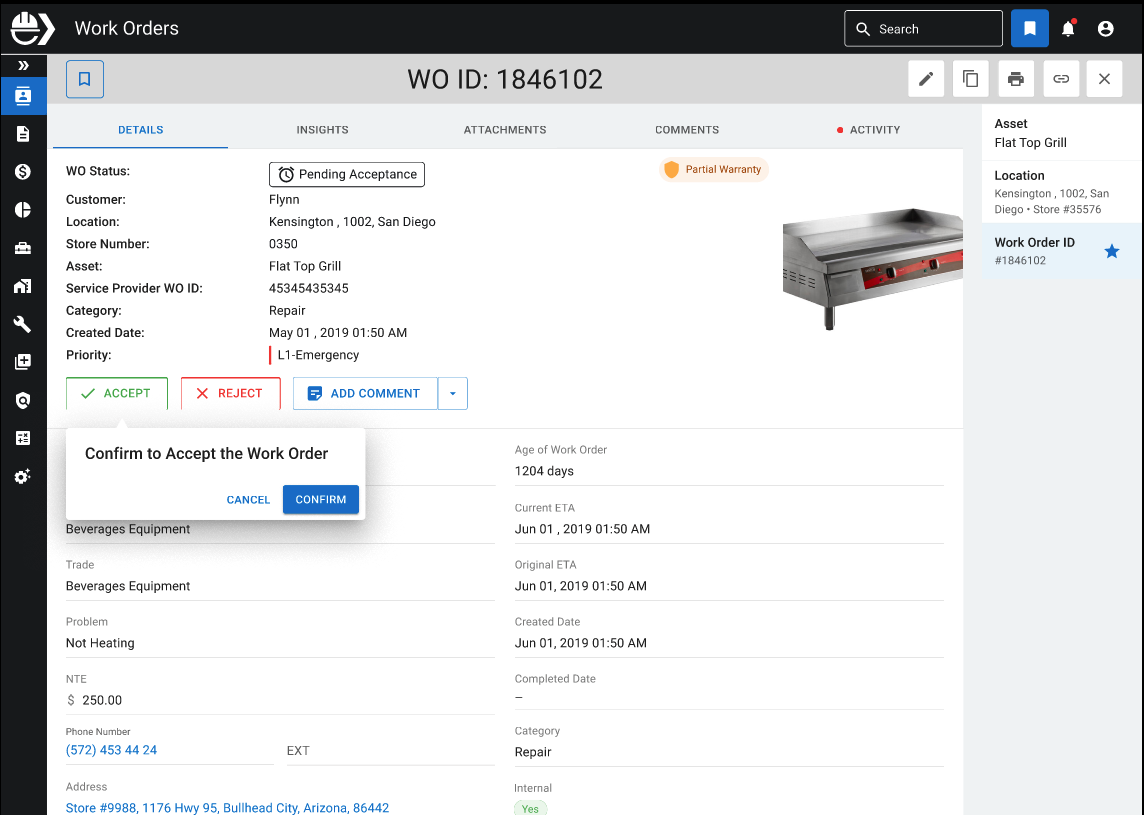
**User’s Guide for**

**Service Providers**

**STEP 1: Accept a Work Order and Create a Proposal**

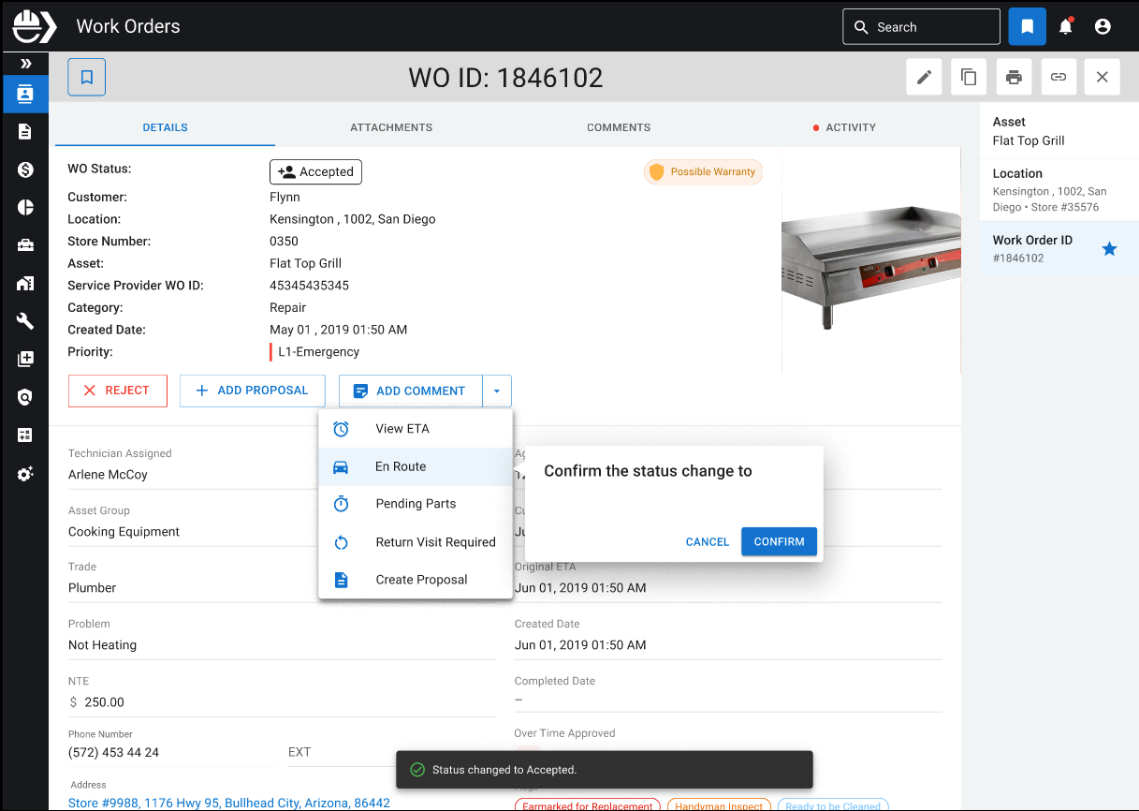
**1**

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



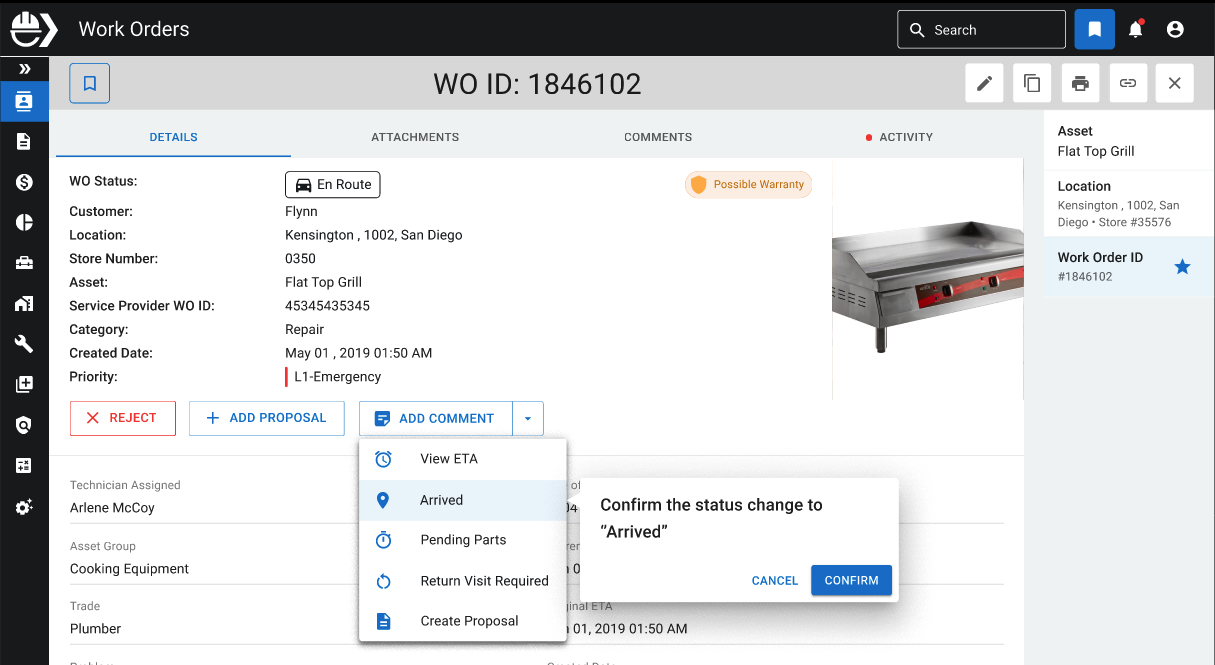
Let us know you are on your way by selecting **Add Comment**, **En Route** and then select **Confirm.**

**2**



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

**3**



**5**

A logo for a restaurant

Description automatically generated

1

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

**4**

A screenshot of a computer

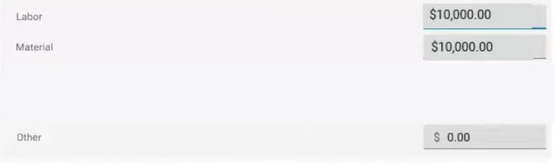
Description automatically generated

**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!

A screenshot of a computer

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A logo for a restaurant

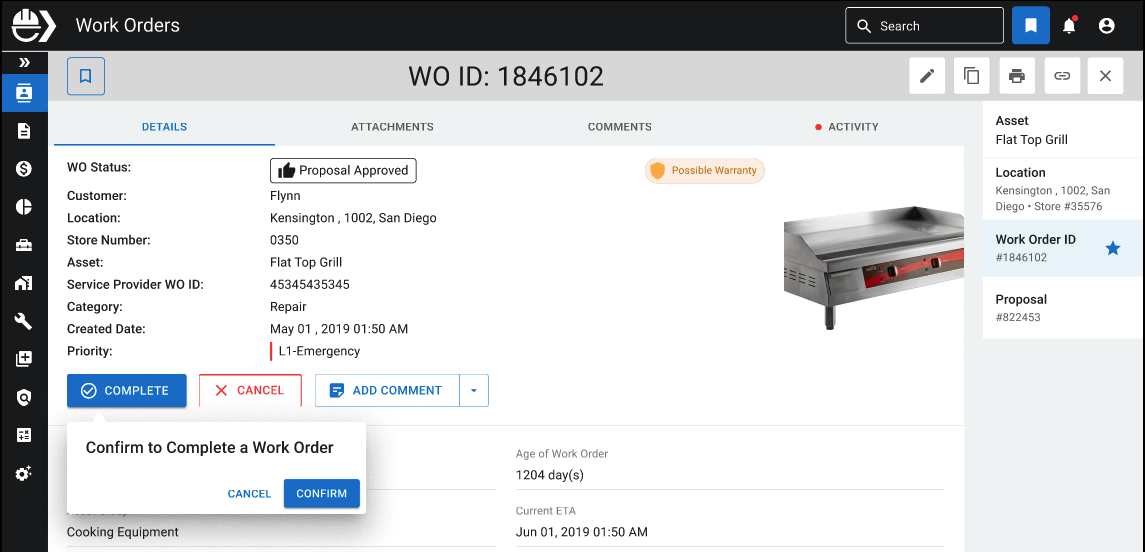
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2

**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**.

**6**

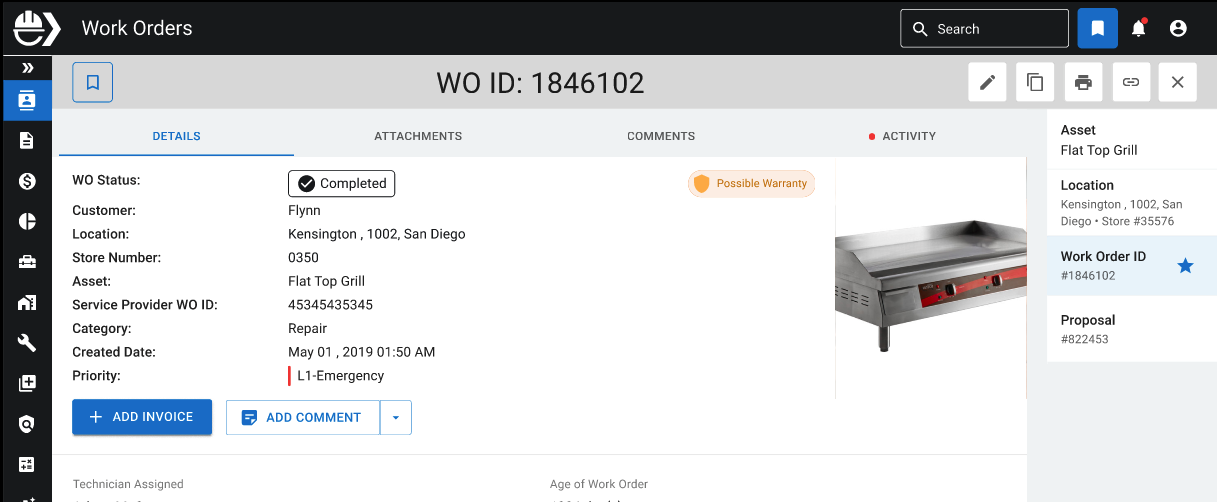


**8**

Check the boxes to add your **Failure Types.**

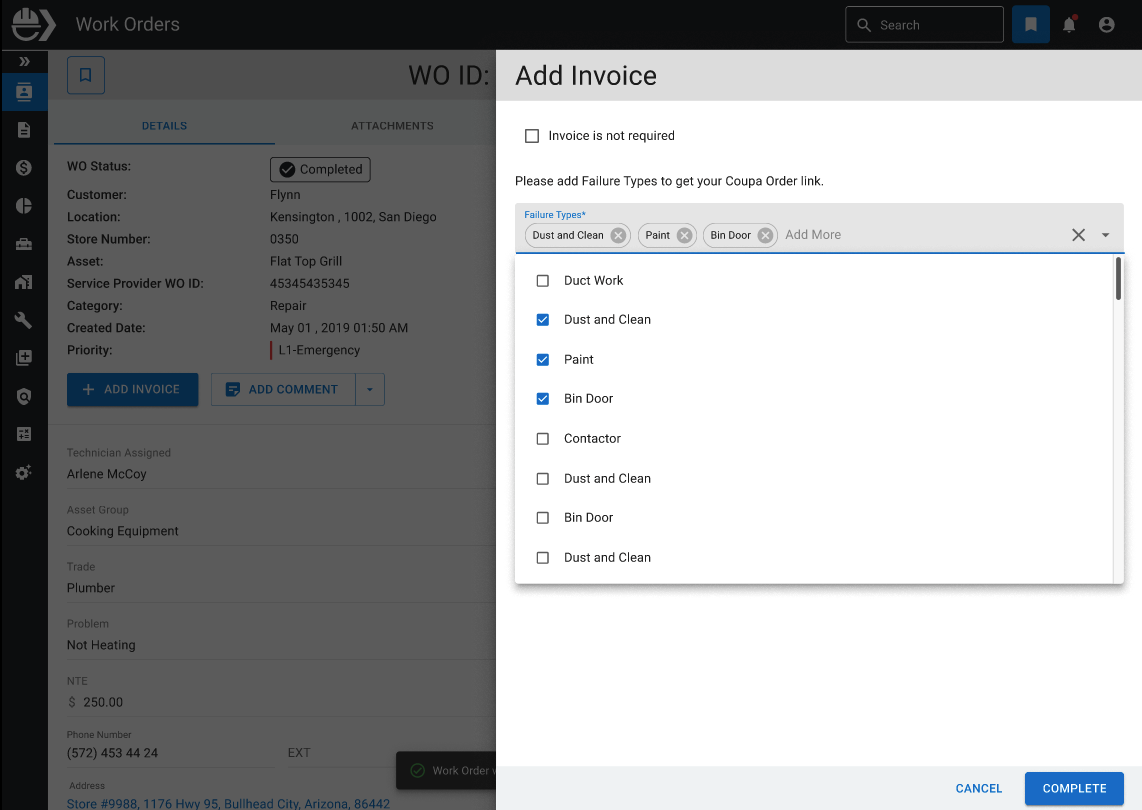
**7**

Tap **Add Invoice**.



Add your **Failure Types.**

**8**



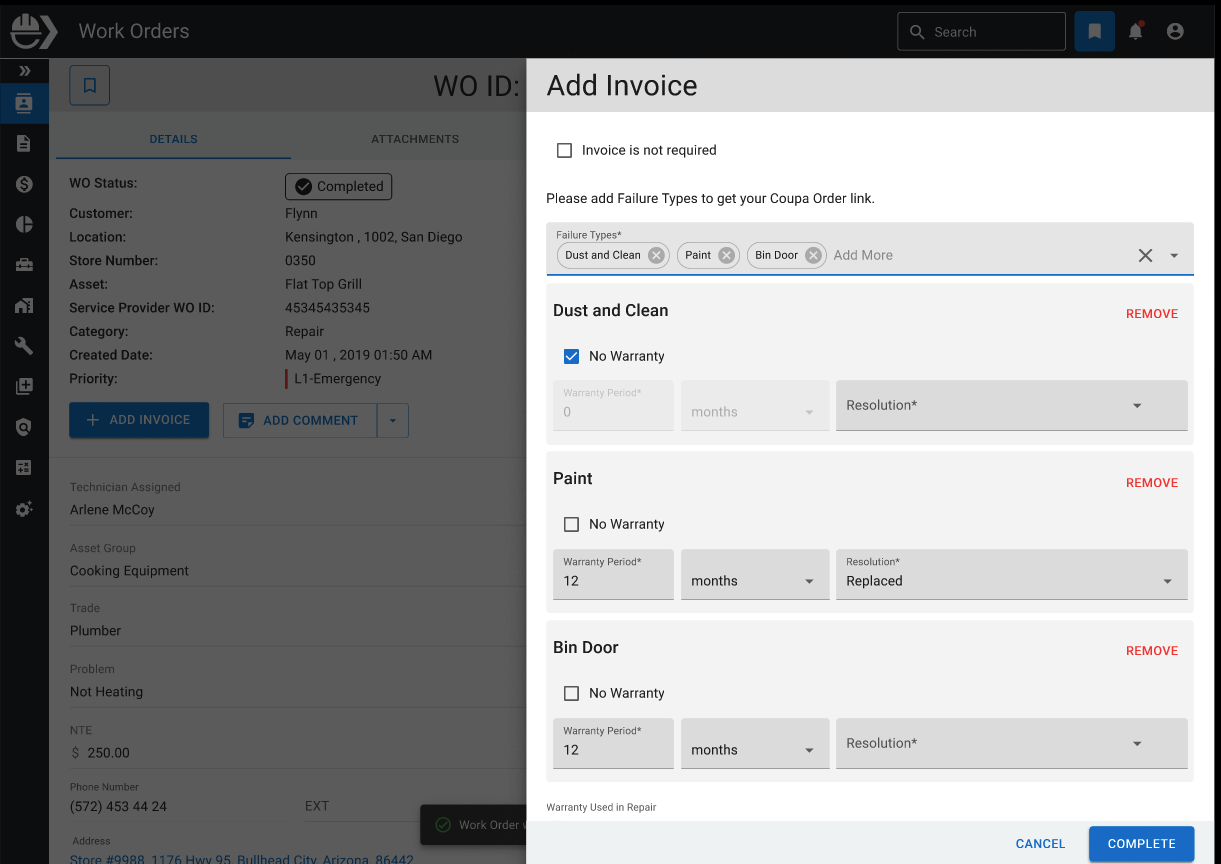
A logo for a restaurant

Description automatically generated

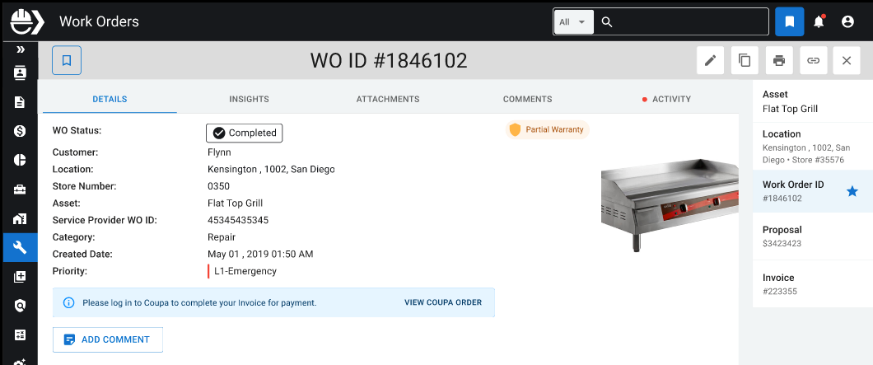
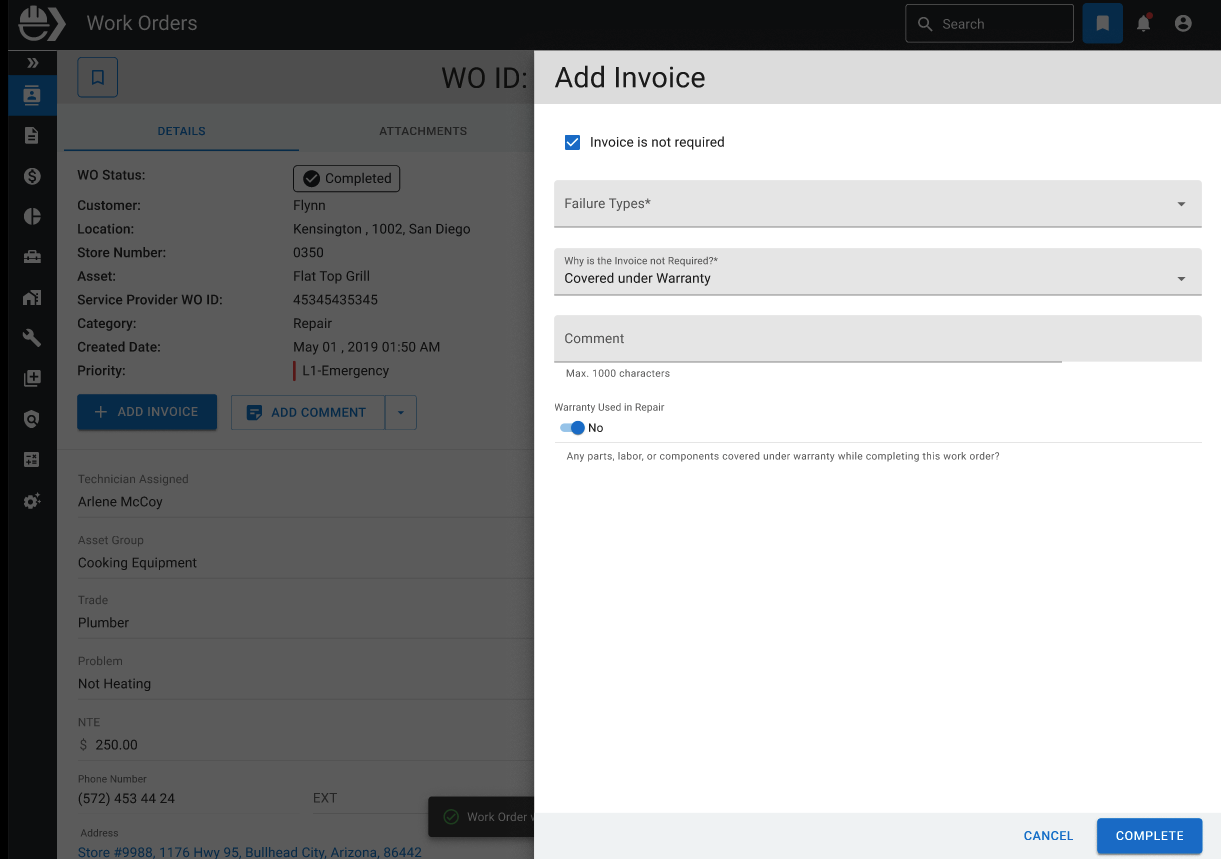
3

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

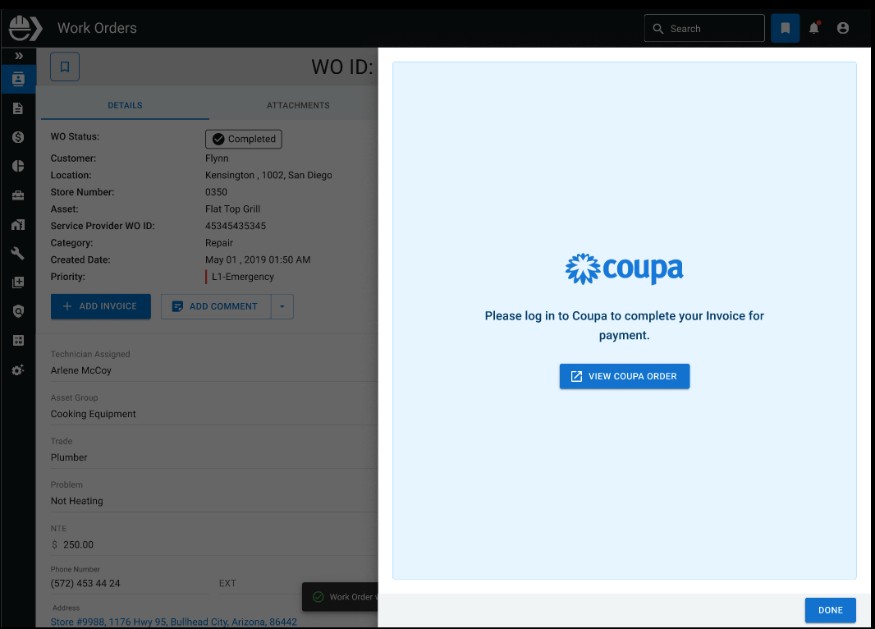
**9**



**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.



Or you can also login to Coupa from the completed work order.

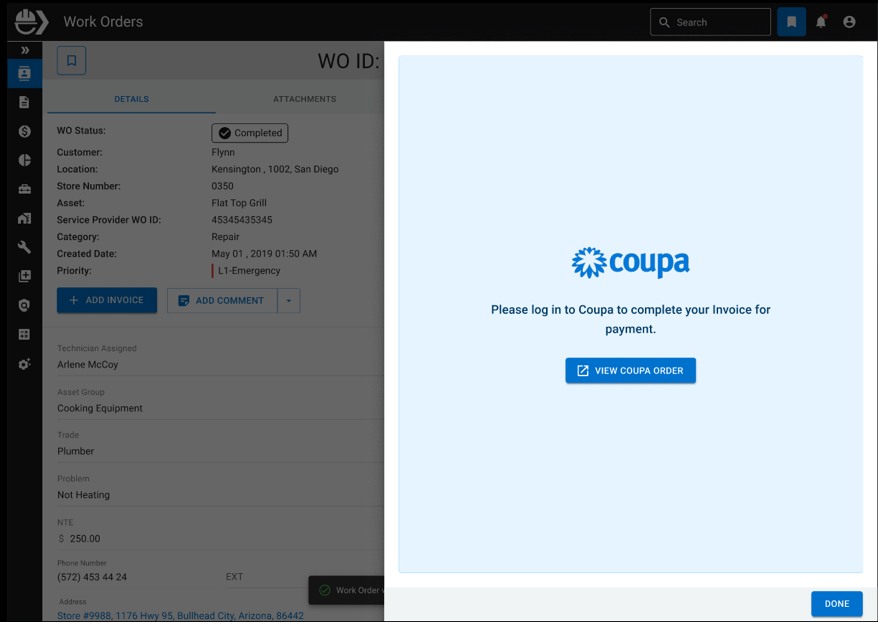


Select **View Coupa Order** to login to Coupa to complete your invoice for payment and select **Done**.

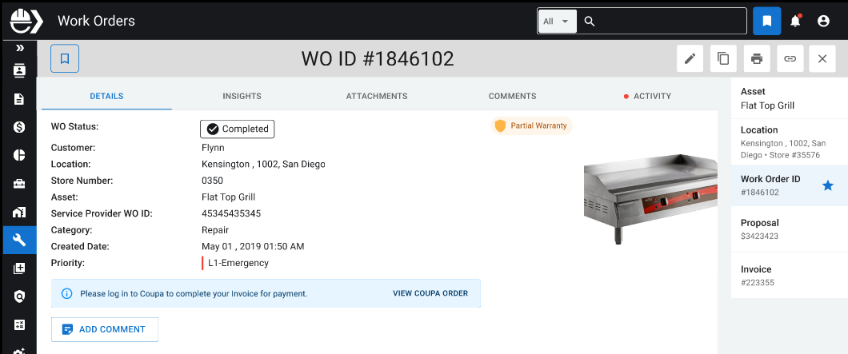
**10**

**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**



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Description automatically generated

4

A screenshot of a login screen

Description automatically generated

**Login** to the Coupa Supplier Portal.

**11**

A screenshot of a computer

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**12**

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

A screenshot of a computer

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**13**

**14**

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

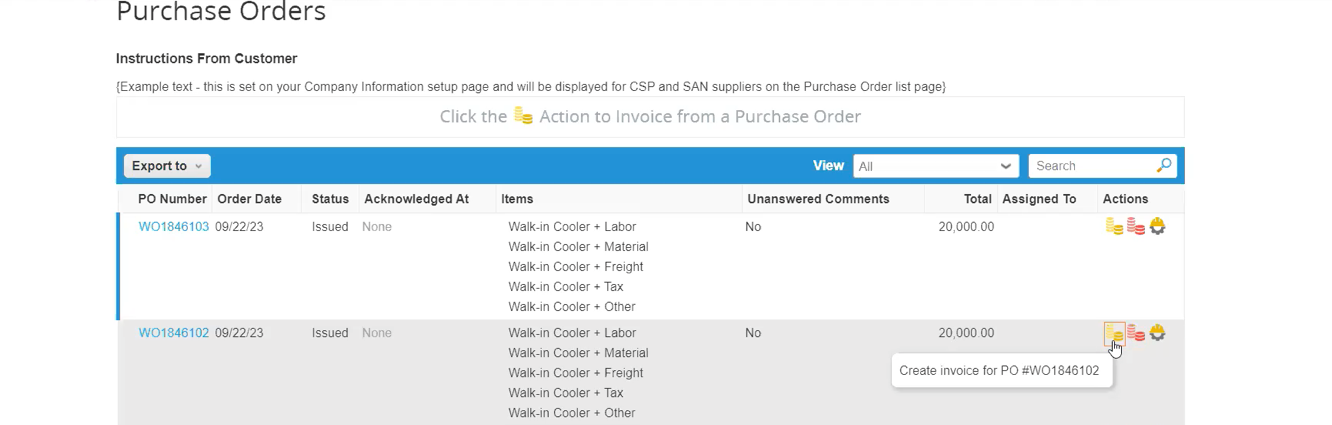
![A white background with black dots

Description automatically generated](data:image/png;base64,iVBORw0KGgoAAAANSUhEUgAAADMAAAAfCAMAAAB9EQVVAAAAAXNSR0IArs4c6QAAAARnQU1BAACxjwv8YQUAAAAGUExURf///wAAAFXC034AAAACdFJOU/8A5bcwSgAAAAlwSFlzAAAh1QAAIdUBBJy0nQAAABZJREFUOE9jGAWjYBSMglEwCigCDAwABkwAAUWqhJgAAAAASUVORK5CYII=)

![A white background with black and white clouds

Description automatically generated with medium confidence](data:image/png;base64,iVBORw0KGgoAAAANSUhEUgAAAEIAAAAgCAYAAACmaK65AAAAAXNSR0IArs4c6QAAAIRlWElmTU0AKgAAAAgABQESAAMAAAABAAEAAAEaAAUAAAABAAAASgEbAAUAAAABAAAAUgEoAAMAAAABAAIAAIdpAAQAAAABAAAAWgAAAAAAAADcAAAAAQAAANwAAAABAAOgAQADAAAAAQABAACgAgAEAAAAAQAAAEKgAwAEAAAAAQAAACAAAAAAsP0nSAAAAAlwSFlzAAAh1QAAIdUBBJy0nQAAAHVJREFUaAXt1LENgDAQBEE/cv/9fmRk8cnVwJAgHC7jq+4+y7MeDb4C+xwgbgoi5koIIcQUmNeuqjz56ZerMT9eCCFyA4gggogsQET2sBFEEJEFiMgeNoIIIrIAEdnDRhBBRBYgInvYCCKIyAJEZA8bQUSKeAF7Xwcut8MhyAAAAABJRU5ErkJggg==)

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.



![A white background with black and white clouds

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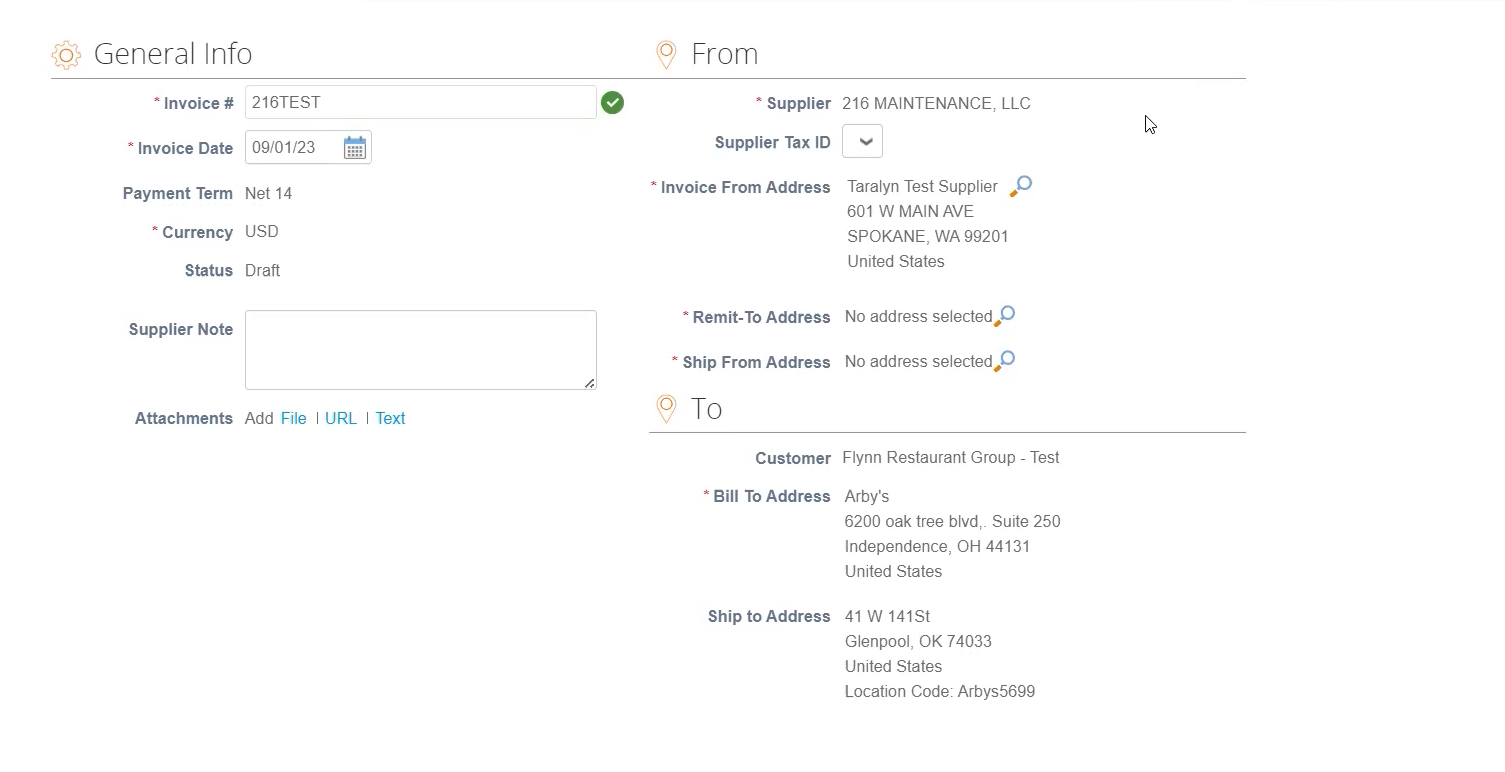
A logo for a restaurant

Description automatically generated

5

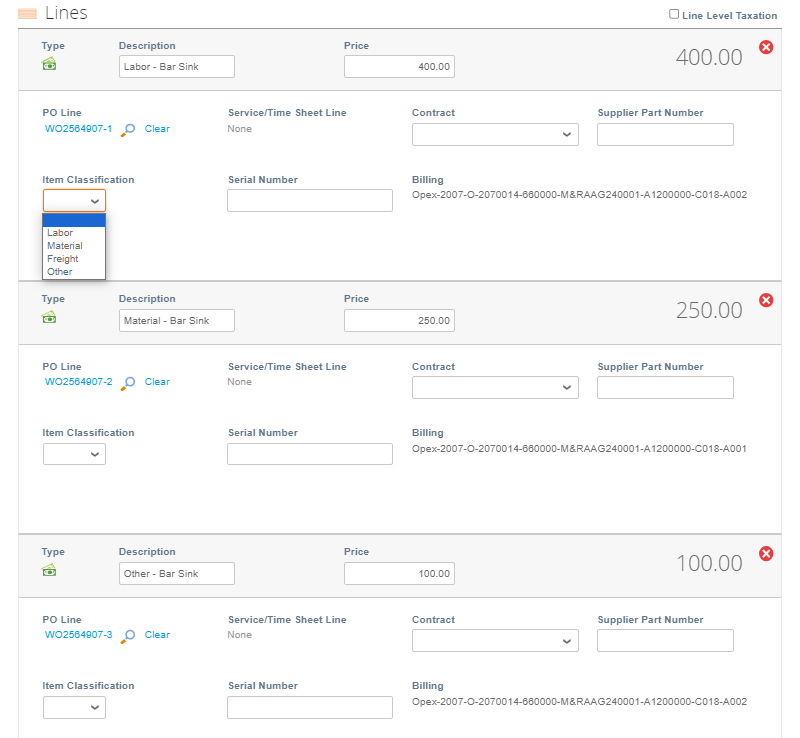
Under **General Info**, Add your **Invoice Number**, **Invoice Date, Notes** and any **Attachments**. The From and To fields will automatically populate your information from the Coupa portal.

**15**



**16**

When you scroll down the page, you will see all the individual line items associated with an invoice. For each invoice line adjust the price (if needed) to match your invoice and select the appropriate “Item Classification” field. If you are not invoicing a line, you should select the **red X**.



![A white background with black and white clouds

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![A white background with black and white clouds

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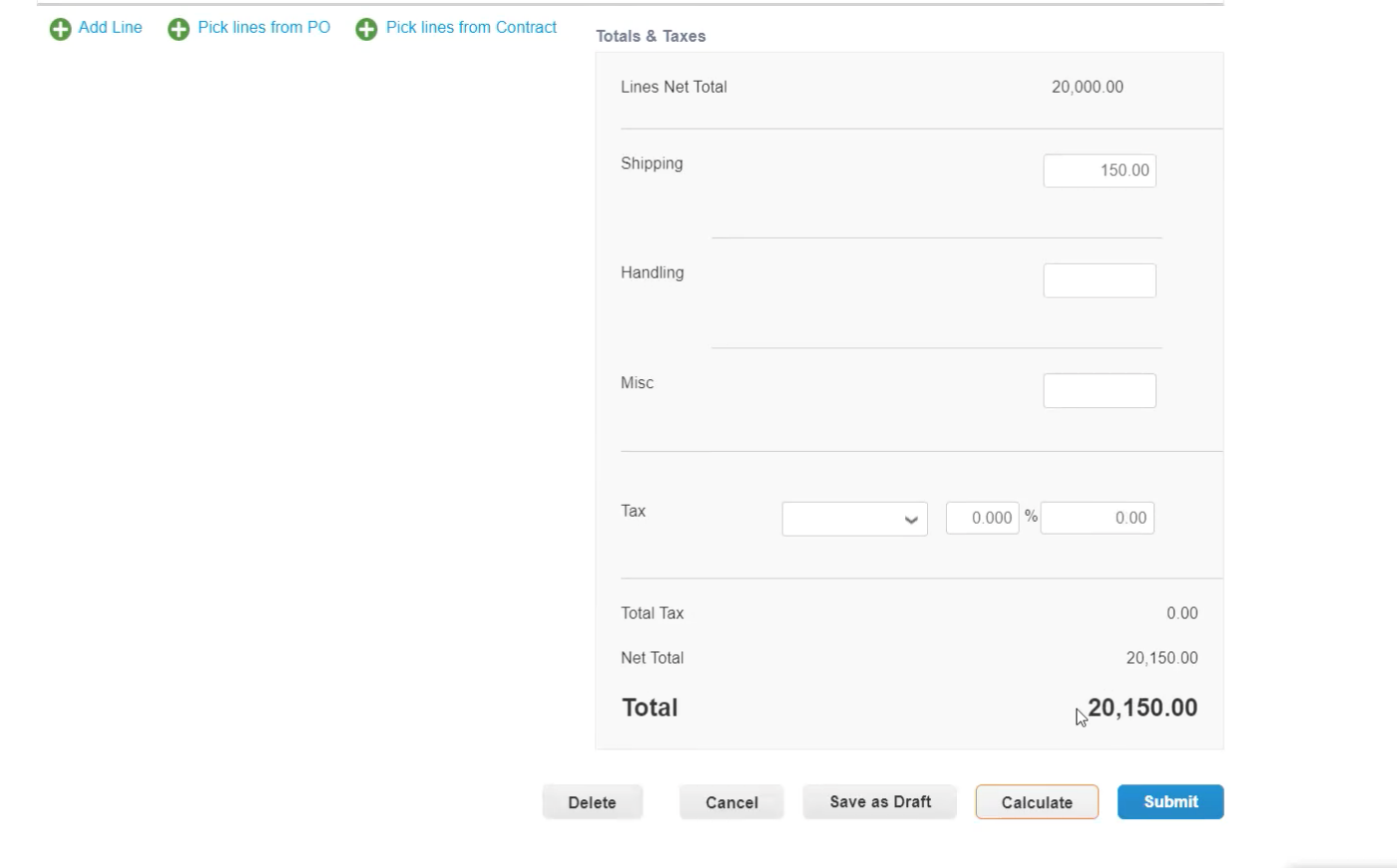
A logo for a restaurant

Description automatically generated

6

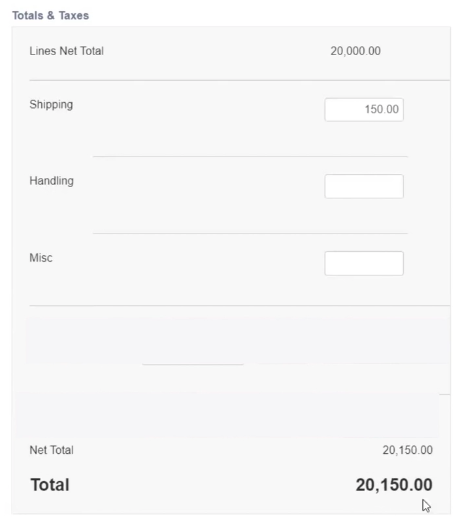
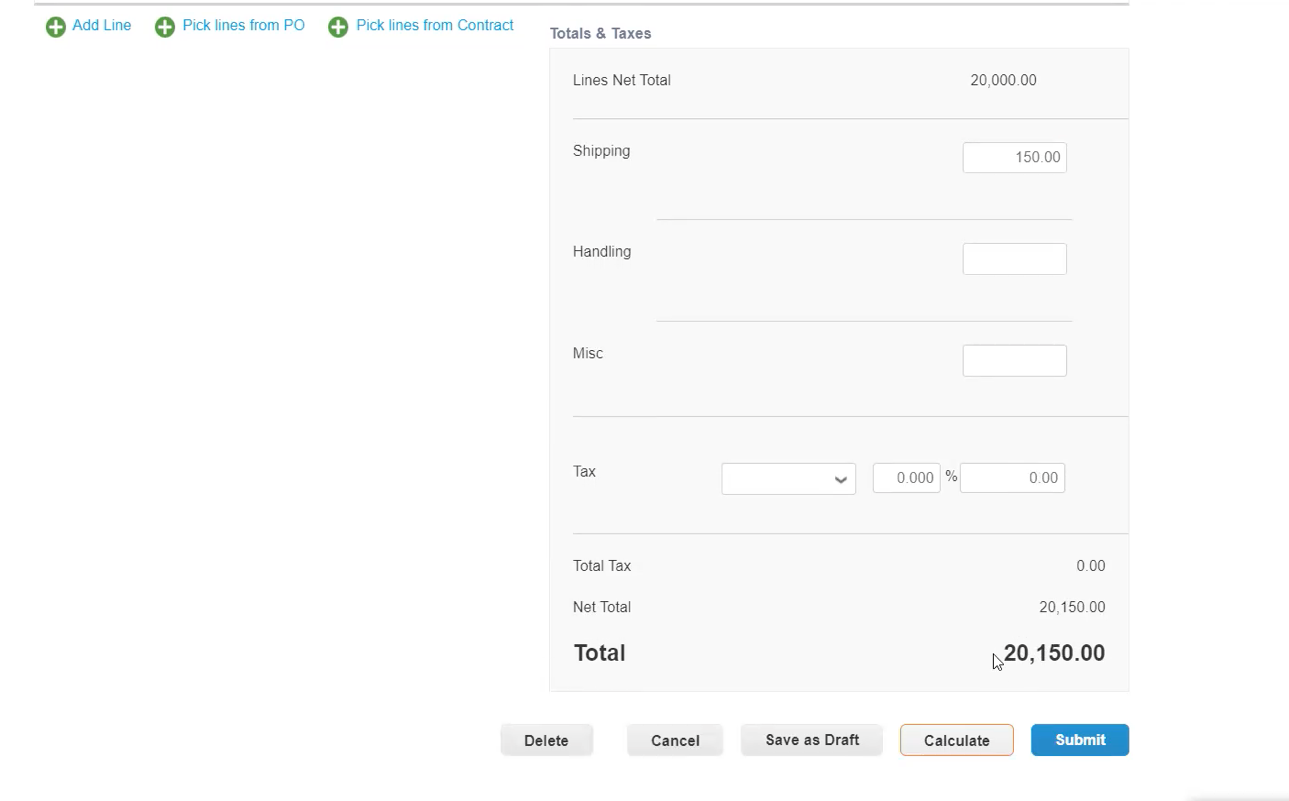
Under **Totals & Taxes** you can add **Shipping, Handling, Misc and Tax** if needed.Tap **Calculate** before submitting the invoice to see the total.

**17**



**18**

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



A logo for a restaurant

Description automatically generated

7

A screenshot of a computer

Description automatically generatedA logo for a restaurant

Description automatically generated

8