



User Guide for Service Providers

flynn
group

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**.

The screenshot shows the 'Work Orders' interface for WO ID: 1846102. The status is 'Pending Acceptance'. The 'ACCEPT' button is highlighted with a blue box. Below it, a confirmation dialog 'Confirm to Accept the Work Order' is displayed, with the 'CONFIRM' button highlighted with a blue box. The dialog also shows 'Age of Work Order: 1204 days' and 'Current ETA: Jun 01, 2019 01:50 AM'.

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

The screenshot shows the 'Work Orders' interface for WO ID: 1846102. The status is 'Accepted'. The 'ADD COMMENT' button is highlighted with a blue box, and the 'En Route' option is selected from the dropdown menu. A confirmation dialog 'Confirm the status change to' is displayed, with the 'CONFIRM' button highlighted with a blue box. The dialog also shows 'Original ETA: Jun 01, 2019 01:50 AM'.

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

The screenshot shows the 'Work Orders' interface for WO ID: 1846102. The status is 'En Route'. The 'ADD COMMENT' button is highlighted with a blue box, and the 'Arrived' option is selected from the dropdown menu. A confirmation dialog 'Confirm the status change to "Arrived"' is displayed, with the 'CONFIRM' button highlighted with a blue box. The dialog also shows 'Original ETA: Jun 01, 2019 01:50 AM'.

- 4 If Applicable, select the drop-down arrow next to Actions, a drop-down menu will appear, giving you the option to **Add Proposal**.

WO ID #3912025

DETAILS ATTACHMENTS COMMENTS ACTIVITY

Work Order ID: 3912025
 WO Status: **ARRIVED**
 Customer: Flynn Restaurant Group
 Location: Applebee's Lacey 9524
 Store Number: 9524
 Asset: GU Sink
 Service Provider WO ID: -
 Category: Repair
 Priority: L4 - 48 Hours
 Last Comment: Return visit required to cut w...

ACTIONS REASSIGN ADD COMMENT

Update ETA
Add Proposal
 Print Work Order

Allocated Inventory
 + ALLOCATE INVENTORY

Location Address: 525 Sleater Kinney Road Southeast, Lacey, WA 98503 US
 Asset Group: Sinks

- 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 Search

WO ID: 1846102

Asset: Beverage Cooler / Under Counter
 Location: Kensington, 1002, San Diego • Store #35576
 Problem: Legs are not stable

Proposal Title*: Increase NTE to \$20,000.00
 Service Provider Proposal ID: 66547

Completion Time: 2 day(s) after approval

Total	\$20,000.00
NTE	\$15,000.00
Labor	\$10,000.00
Material	\$10,000.00
Other	\$ 0.00

Incurred Costs (\$)

SAVE

- 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 Select the drop-down arrow next to Actions, a drop-down menu will appear, giving you the option to **Add Invoice**.

- 8 Add your **Failure Types**.

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

Work Orders

WO ID: 1846102

ADD INVOICE

Invoice is not required

Please add Failure Types to get your Coupa Order link.

Failure Types*

Dust and Clean

No Warranty

Warranty Period* 0 months

Resolution*

REMOVE

Paint

No Warranty

Warranty Period* 12 months

Resolution* Replaced

REMOVE

Bin Door

No Warranty

Warranty Period* 12 months

Resolution*

REMOVE

Warranty Used in Repair

CANCEL 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.

Work Orders

WO ID: 1846102

ADD INVOICE

Invoice is not required

Failure Types*

Why is the Invoice not Required?*

Covered under Warranty

Comment

Max. 1000 characters

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.

Work Orders

WO ID: 1846102

VIEW COUPA ORDER

Please log in to Coupa to complete your invoice for payment.

OR

Work Orders

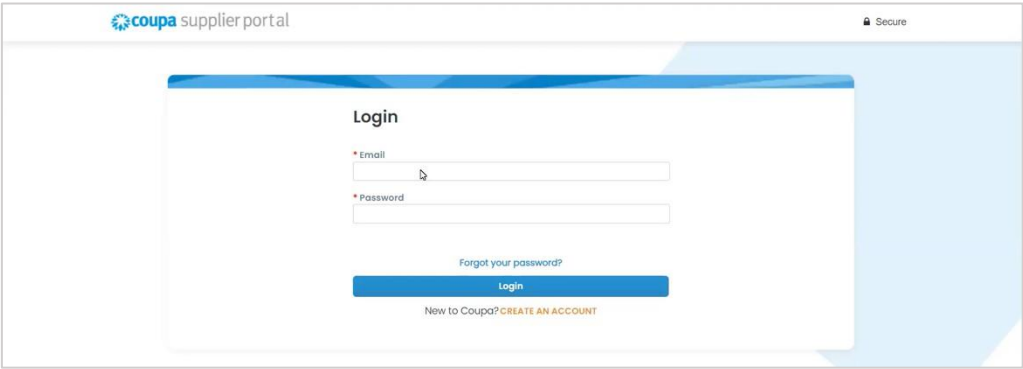
WO ID: 1846102

VIEW COUPA ORDER

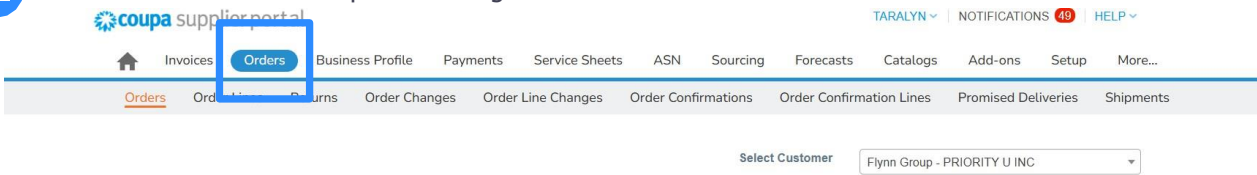
Please log in to Coupa to complete your invoice for payment.

STEP 2: Create an Invoice

11 Login to the Coupa Supplier Portal.



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



Purchase Orders

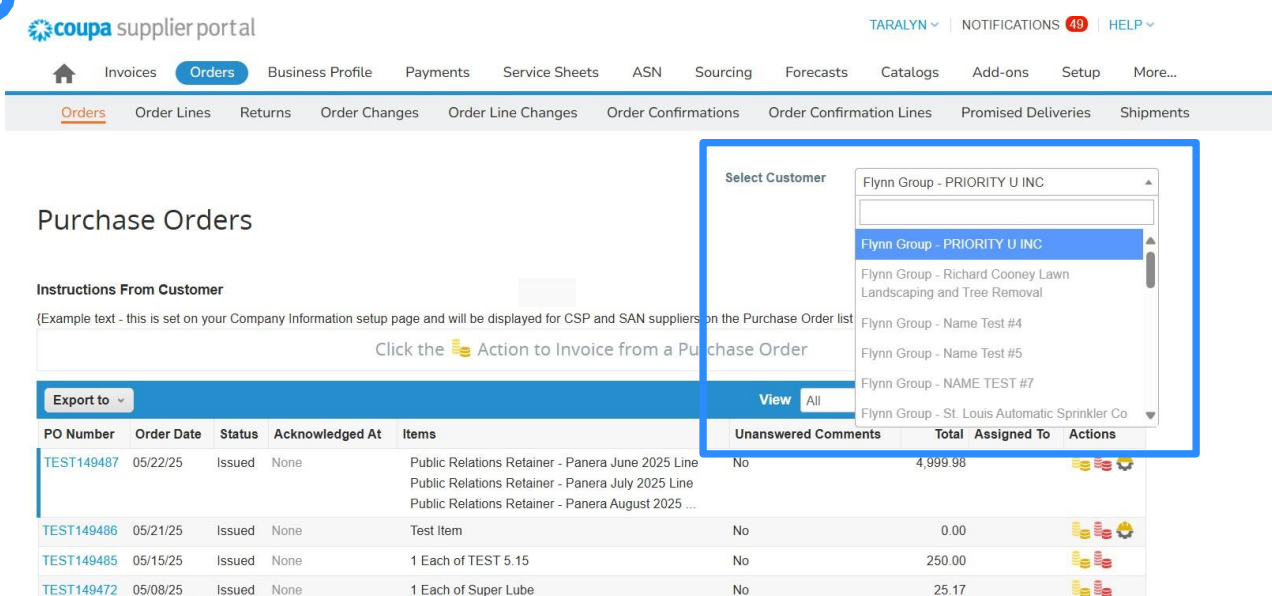
Instructions From Customer

(Example 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

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
TEST149487	05/22/25	Issued	None	Public Relations Retainer - Panera June 2025 Line Public Relations Retainer - Panera July 2025 Line Public Relations Retainer - Panera August 2025	No	4,999.98		


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








- 14 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.

Purchase Orders

Instructions From Customer
(Example 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

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 + Material Walk-in Cooler + Freight Walk-in Cooler + Tax Walk-in Cooler + Other	No	20,000.00		 
WO1846102	09/22/23	Issued	None	Walk-in Walk-in Cooler + Material Walk-in Cooler + Freight Walk-in Cooler + Tax Walk-in Cooler + Other	No	20,000.00		  

- 15 Under **General Info**, Add your **Invoice Number**, **Invoice Date**, **Notes** and the PDF invoice image is added to the **Attachments**. The From and To fields will automatically populate your information from the Coupa portal. The From and To Sections are auto populated and do not need to change.

General Info

* Invoice #

* Invoice Date


Payment Term Net 60

* Currency USD

Delivery Number

Status Draft

Supplier Note

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

From

* Supplier PRIORITY U INC

Supplier Tax ID

* Invoice From Address Priority U
6200 Oak Tree Blvd. S
Independence, OH 44139
United States

* Remit-To Address Priority U
6200 Oak Tree Blvd. S
Independence, OH 44139
United States

* Ship From Address Priority U
6200 Oak Tree Blvd. S
Independence, OH 44139
United States

To

Customer Flynn Group

* Bill To Address Flynn Group
6200 Oak Tree Blvd Ste 250
Independence, OH 44131
United States

Buyer Tax ID

* Ship to Address 6200 Oak Tree Blvd, Ste 250
Independence, OH 44131
United States
Location Code: SupportCenterCLE

Ecotrak work order number

- 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. Do not delete any invoice lines from the invoice. If you are not invoicing a line, you should select the **red X**.

Lines

Line Level Taxation

Type	Description	Price	
Labor - Bar Sink		400.00	400.00
<div> <div> <div>PO Line</div> <div>WO2564907-1</div> <div>Clear</div> </div> <div> <div>Service/Time Sheet Line</div> <div>None</div> </div> <div> <div>Contract</div> <div></div> </div> <div> <div>Supplier Part Number</div> <div></div> </div> </div>			
<div> <div>Item Classification</div> <div> <div>Labor</div> <div>Material</div> <div>Freight</div> <div>Other</div> </div> </div> <div> <div>Serial Number</div> <div></div> </div> <div> <div>Billing</div> <div>Opex-2007-O-2070014-860000-M&RAAG240001-A1200000-C018-A002</div> </div>			
Material - Bar Sink		250.00	250.00
<div> <div>PO Line</div> <div>WO2564907-2</div> <div>Clear</div> </div> <div> <div>Service/Time Sheet Line</div> <div>None</div> </div> <div> <div>Contract</div> <div></div> </div> <div> <div>Supplier Part Number</div> <div></div> </div>			
<div> <div>Item Classification</div> <div></div> </div> <div> <div>Serial Number</div> <div></div> </div> <div> <div>Billing</div> <div>Opex-2007-O-2070014-860000-M&RAAG240001-A1200000-C018-A001</div> </div>			
Other - Bar Sink		100.00	100.00
<div> <div>PO Line</div> <div>WO2564907-3</div> <div>Clear</div> </div> <div> <div>Service/Time Sheet Line</div> <div>None</div> </div> <div> <div>Contract</div> <div></div> </div> <div> <div>Supplier Part Number</div> <div></div> </div>			
<div> <div>Item Classification</div> <div></div> </div> <div> <div>Serial Number</div> <div></div> </div> <div> <div>Billing</div> <div>Opex-2007-O-2070014-860000-M&RAAG240001-A1200000-C018-A002</div> </div>			

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

+ 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	20,150.00

Delete

Cancel

Save as Draft

Calculate

Submit

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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	
Net Total	20,150.00
Total	20,150.00

Delete
Cancel
Save as Draft
Calculate
Submit

e> Work Orders
+ CREATE SERVICE REQUEST

Search

Invoice ID: 223355

DETAILS
SP RATES & TERMS
ATTACHMENTS
COMMENTS
ACTIVITY

Status: Paid
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	\$3,000.000
Material	\$1,000.000
Freight	\$14,000.00
Tax	\$2,000.00
Other	\$150.00

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

Last Updated: 9/22/2025