

Service Provider Onboarding into Coupa/Ecotrak

About this Guide

This guide provides an overview of how to become established as a vendor for Flynn in Coupa and Ecotrak, allowing you to be selected for work orders and effectively paid by Flynn Group.

This guide contains the following sections:

[Onboarding Step by Step](#)

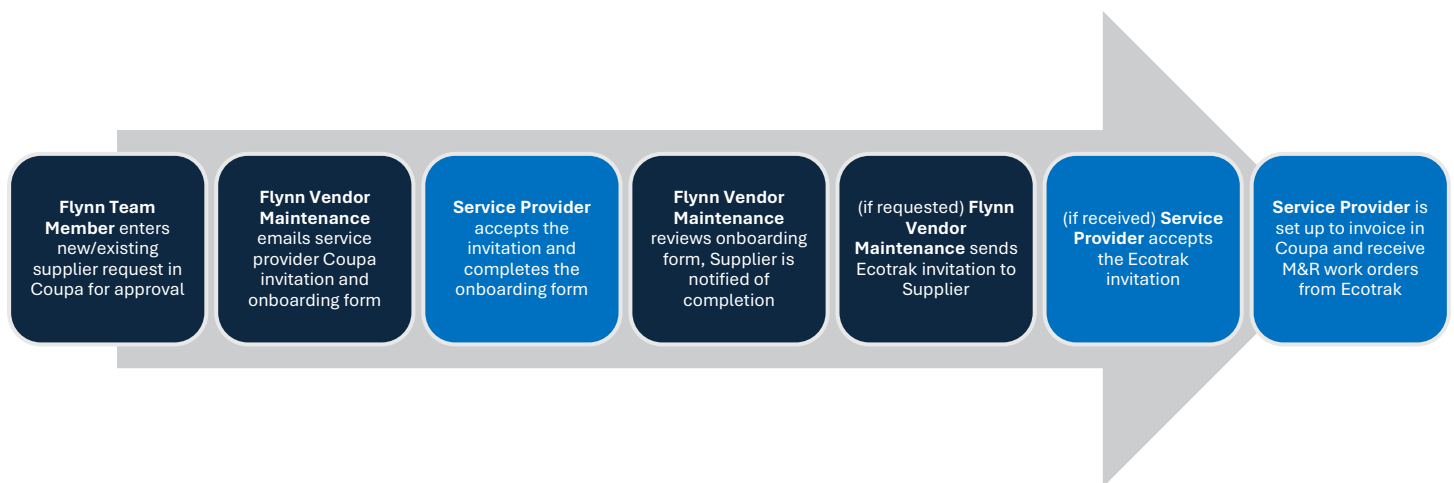
1. [Coupa Invitation & Onboarding Form](#)
2. [Onboarding Form Review](#)
3. [Ecotrak Invitation](#)

[Ecotrak Help Center](#)

[Post Service Provider Setup](#)

[Ecotrak Training and Support Reference Guides](#)

Visual Coupa and Ecotrak Process Overview



Onboarding Step by Step

1. Coupa Invitation & Onboarding Form

- Flynn Team Member** creates a New/Existing Supplier Request in Coupa, option to invite Service Provider in Ecotrak.
- Flynn Vendor Maintenance (VM)** upon approval, sends invitation to Service Provider to include the Onboarding form and [Coupa Registration Guide](#) with step-by-step instructions.
- Service Provider (SP)** accepts invitation and completes Onboarding form (see [Coupa Registration Guide](#)). Any account set up questions can be sent to vendormaintenance@flynnrg.com

Example of invitation vendor receives to link with Flynn to get established:

Hello Supplier,

Flynn Group wants you to respond by updating your company profile on Flynn Marketplace/Coupa, their chosen platform for Spend Management. This information is required so they can transact with you electronically.

You may know Flynn Group by the business listed below:

- Flynn Restaurant Group LP
- Apple American Group (Applebee's)
- Bell American Group (Taco Bell)
- RB American Group (Arby's)
- Hut American Group (Pizza Hut)
- Wend American Group (Wendy's)
- Pan American Group (Panera Bread)
- Flynn Fitness Group (Planet Fitness)

The Coupa Supplier Portal (CSP) is completely free, setup is fast, and it helps you better transact and communicate electronically. Find out more using the links below.

Joining allows you to update your company info easily if it ever changes, as well as do things with Flynn Group (and your other buying organizations that use Coupa) like view purchase orders, create invoices, manage POs and invoices, get real-time SMS alerts, and much more.

Registration Guide: <https://www.flynnrestaurantgroup.com/wp-content/uploads/2025/10/Registering-with-Coupa-Guide-9.19.pdf>

Additional Supplier Resources: <https://www.flynnrestaurantgroup.com/suppliers/>

You will need to have the below items when completing the registration form:

- Access to Mobile Device & Desktop/Laptop
- Signed W9 saved to your Desktop/Laptop
- Bank Information if preferred payment method is via ACH
- Certificate of Insurance saved to your Desktop/Laptop issued out to:
 - Flynn Restaurant Group ATTN: RISK 6200 Oaktree Blvd Suite 260 Independence, OH 44131

Use the button to either respond or forward this request to another person at your company.

Welcome!

Example of screen vendor see when they first establish Coupa account:

supplier portal

*If invitation needs to be forwarded enter the email address of the person you would like to forward the

[Join Coupa Supplier Portal](#)

[Forward Invitation](#)

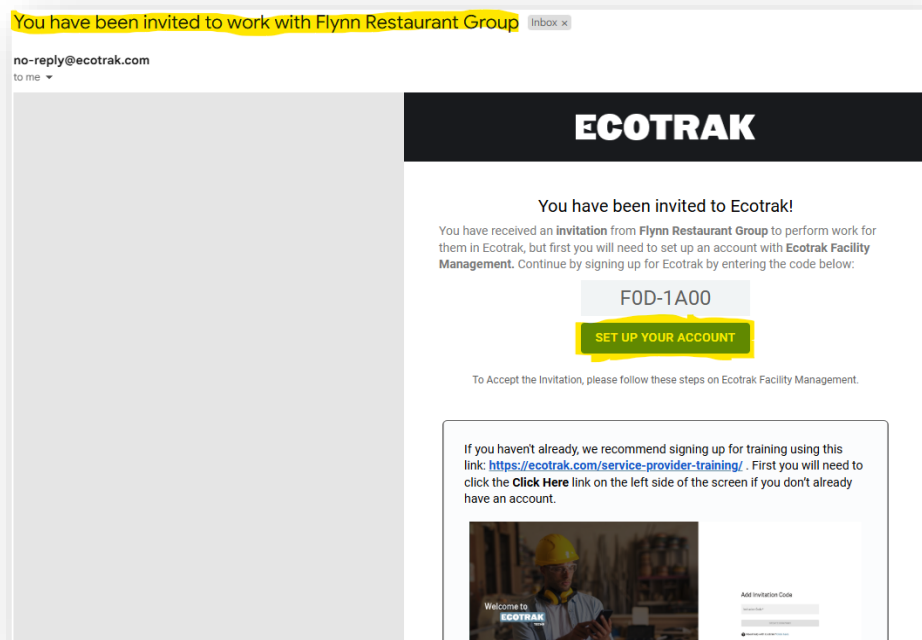
Where user can find onboarding form in Coupa

2. Onboarding Form Review

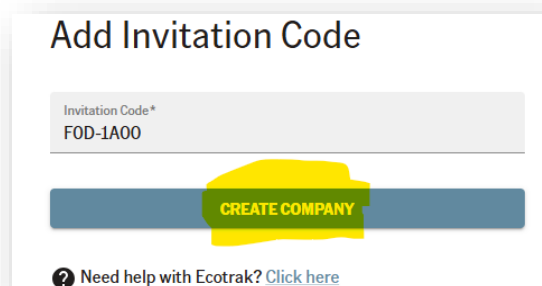
- A. **Flynn Vendor Maintenance (VM)** reviews forms to ensure accuracy.
 - Onboarding Form **may be rejected** and sent back for approval if:
 - Attachments provided do not match with sections in onboarding form
 - Legal Name and EIN/SSN from W9 do not provide an IRS match
 - Payment info not provided for chosen method
 - ***If form is rejected, Flynn team will leave a mandatory comment at the bottom of the form with notes on what needs to be corrected before resubmission***
- B. **No Errors Found** – Coupa Set Up Complete. Both the initiating Flynn employee and the service provider are notified of completion via email.
 - If a typo error is found a new corrected form will be submitted internally by Flynn Vendor Maintenance team. This will delay the onboarding process by 1-2 days.

3. Ecotrak Invitation (if requested by Flynn)

- A. **Flynn Vendor Maintenance (VM)** sends an Ecotrak invitation to service provider within 24-48 hours, post Coupa Set Up completion. The invitation link is valid for 30 days.
- B. **Service Provider (SP)** receives an email invitation (example pictured below) & selects **SET UP YOUR ACCOUNT**



- C. **SP** selects **CREATE COMPANY**



Coupa/Ecotrak Onboarding Quick Reference Guide

- D. **SP** fills in required information (company name, phone, address). **NOTE:** Being added to *Ecotrak's Service Provider Directory* provides visibility to the service provider as an option for other Ecotrak customers, **SP** can uncheck this option if desired

Company Information
This will set up your administrator account for your company account.

Company Name *
Test Joe

Company E-mail
whitacrejoseph2@gmail.com
This will be your dispatch email where new Work Orders will be sent and notifications for existing Work Orders.

Country Code US (+1) Company Phone * (111) 111-1111 EXT

Country Code US (+1) 24 Hour Phone EXT

Country *
United States of America

Address 1 *
6200 Oak Tree Boulevard

Address 2

City * Independence State/Province * OH Zip/Postal Code * 44131

☒ Use same for Billing Address

☒ Would you like to be added to Ecotrak's Service Provider Directory

- E. **SP** fills in required information (name, email address, password) and selects **CREATE COMPANY**. **SP** is now set up in Ecotrak.

Admin User
This user will be your account manager and has to share the same email as the company profile email. If you need more admin users, they can be added in the user module after the account creation.

First Name * Joe Last Name * Whitacre

E-mail * whitacrejoseph2@gmail.com

Password * Confirm Password *

☒ At least one special character
☒ At least one number
☒ At least one capital letter

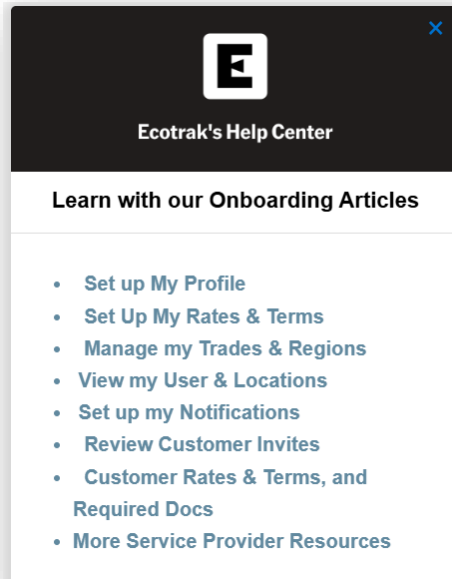
☒ 8 - 20 characters
☒ No trailing or leading spaces
☒ Passwords match

☐ I am a human

CANCEL CREATE COMPANY

Ecotrak Help Center

Upon logging into Ecotrak the **SP** will see the Help Center (pictured below). **SP** is encouraged to review these onboarding articles and add in information (NOT REQUIRED). For system related questions and support **SP** can reach out to - support@ecotrak.com



Post Service Provider Setup

Once SP is fully set up in Coupa and Ecotrak:

- **Flynn Operations** sets Trade Assignment/s to store location/s in Ecotrak to make the Service Provider an option for Work Order creation.
- **Service Provider (SP)** is notified via email when a Work Order is assigned, see [Ecotrak-and-Coupa-Users-Guide-for-Service-Providers-Updated.pdf](#) for Work Order and Invoice process flow.

Ecotrak Training and Support Reference Guides

You can access all training guides and resources for Service Providers navigating Coupa and Ecotrak by visiting our [Supplier Resource Site](#) directly or going to the link below:

<https://www.flynnrestaurantgroup.com/suppliers/>

Tab for Assistance	Task	File Name
Coupa Supplier Portal Registration	Getting Registered in Coupa	Registering with Coupa Guide
		Registering with Coupa Guide – PreExisting Vendor
Ecotrak	Receiving work order in Ecotrak and flipping to invoice in Coupa	Document – Ecotrak and Coupa Users Guide for Service Providers
		Video – Service Provider Ecotrak Coupa Training