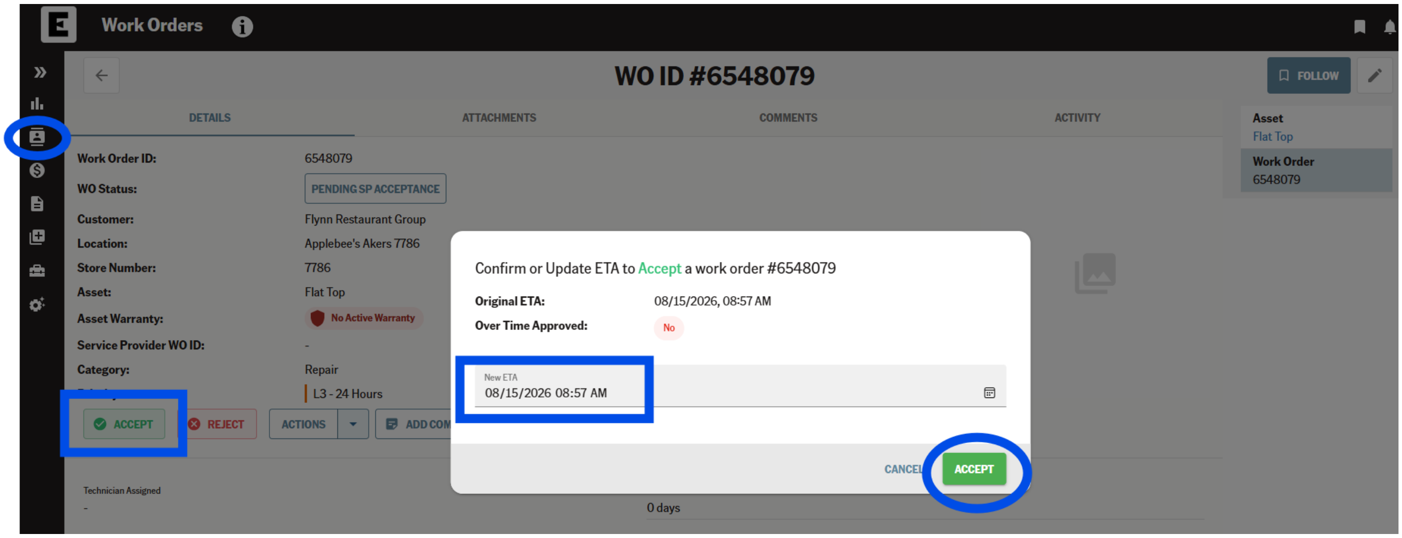
User Guide for Service Providers

STEP 1: Accept a Work Order and Create a Proposal

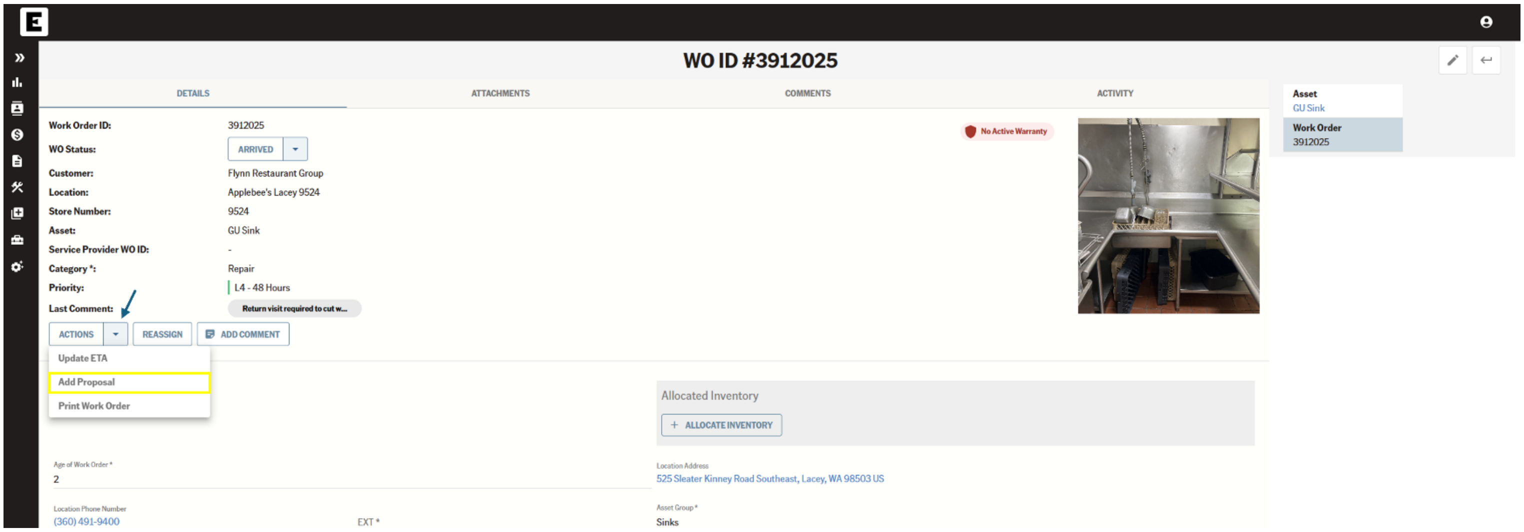
1. From Ecotrak, open the work order in the Work Orders module. Tap **Accept** to accept the work order, update the **WO ETA** as needed and then select **Accept**.



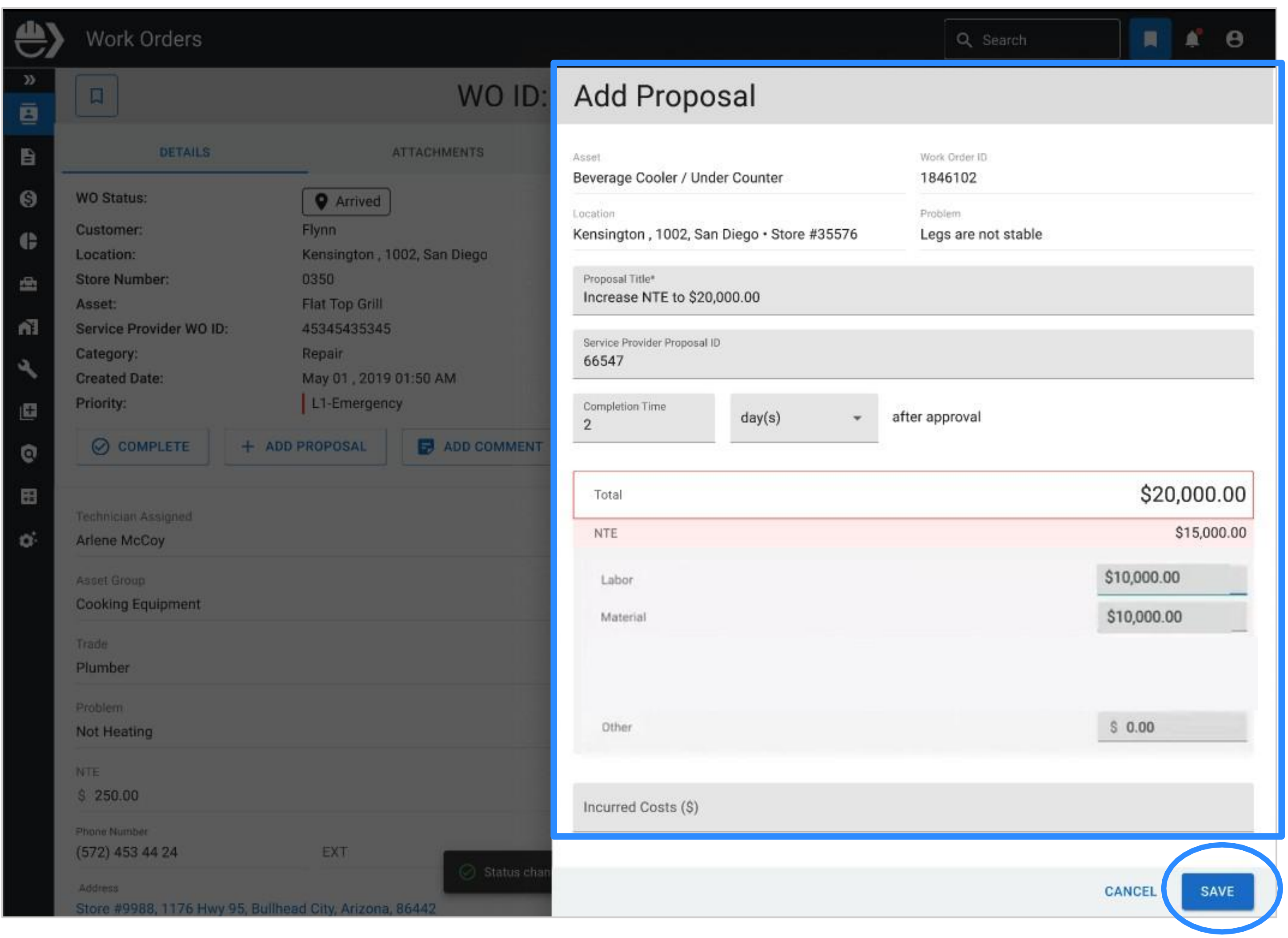
2. Let us know you are on your way by selecting **En Route** from the **WO Status** drop down selections**.**

3. Let us know you arrived on-site by selecting **Arrived** from the **WO Status** drop down selections.

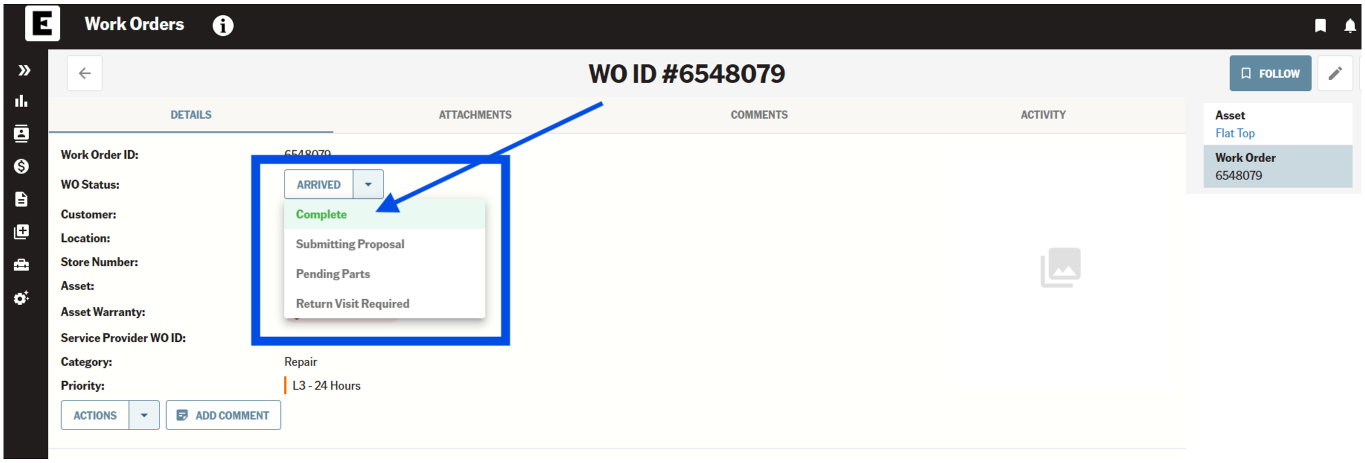
4. If Applicable, select the drop-down arrow next to Actions, a drop-down menu will appear, giving you the option to **Add Proposal**.



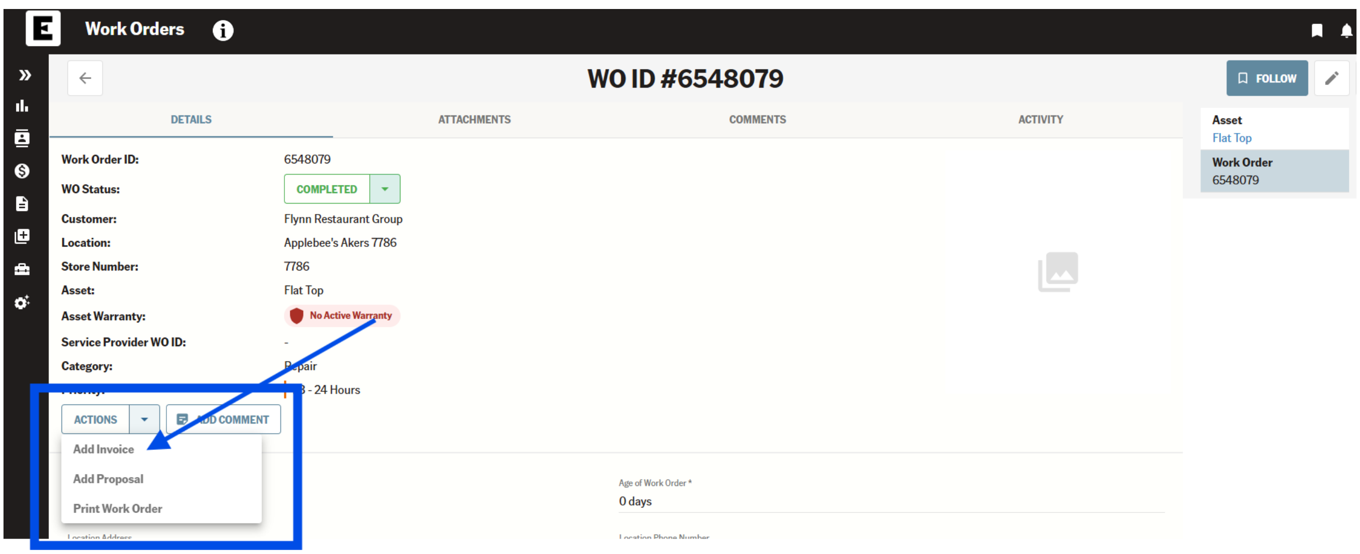
5. Fill out the proposal and tap **Save** to submit the proposal to us. The Flynn team will review the proposal and approve it if everything looks good!



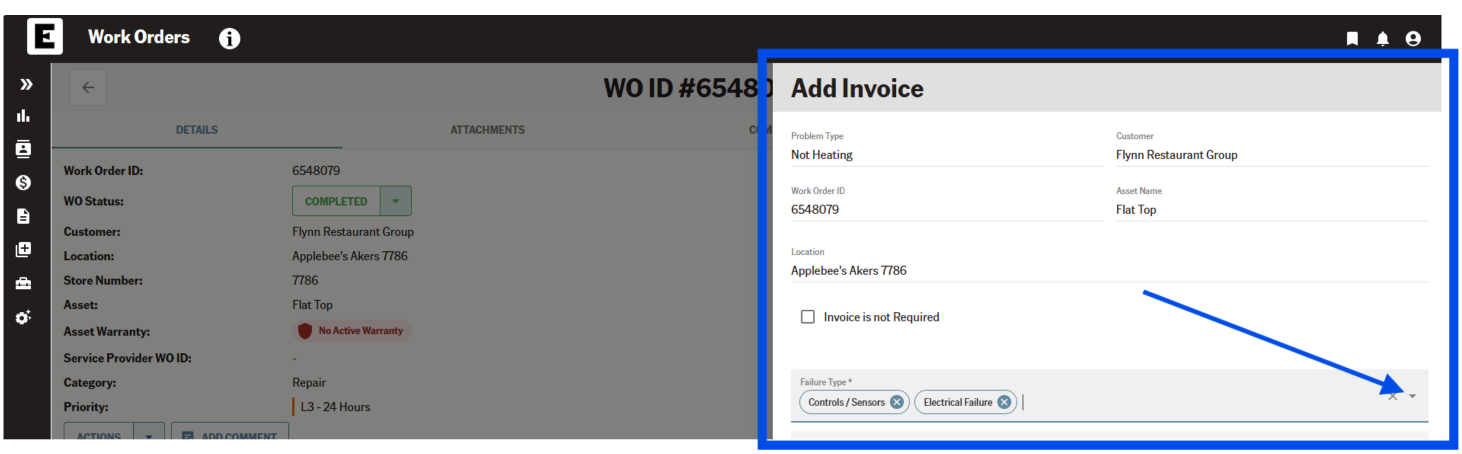
6. Finished with the job? Once the work order is complete, select **Complete** from the **WO Status** drop down selections.



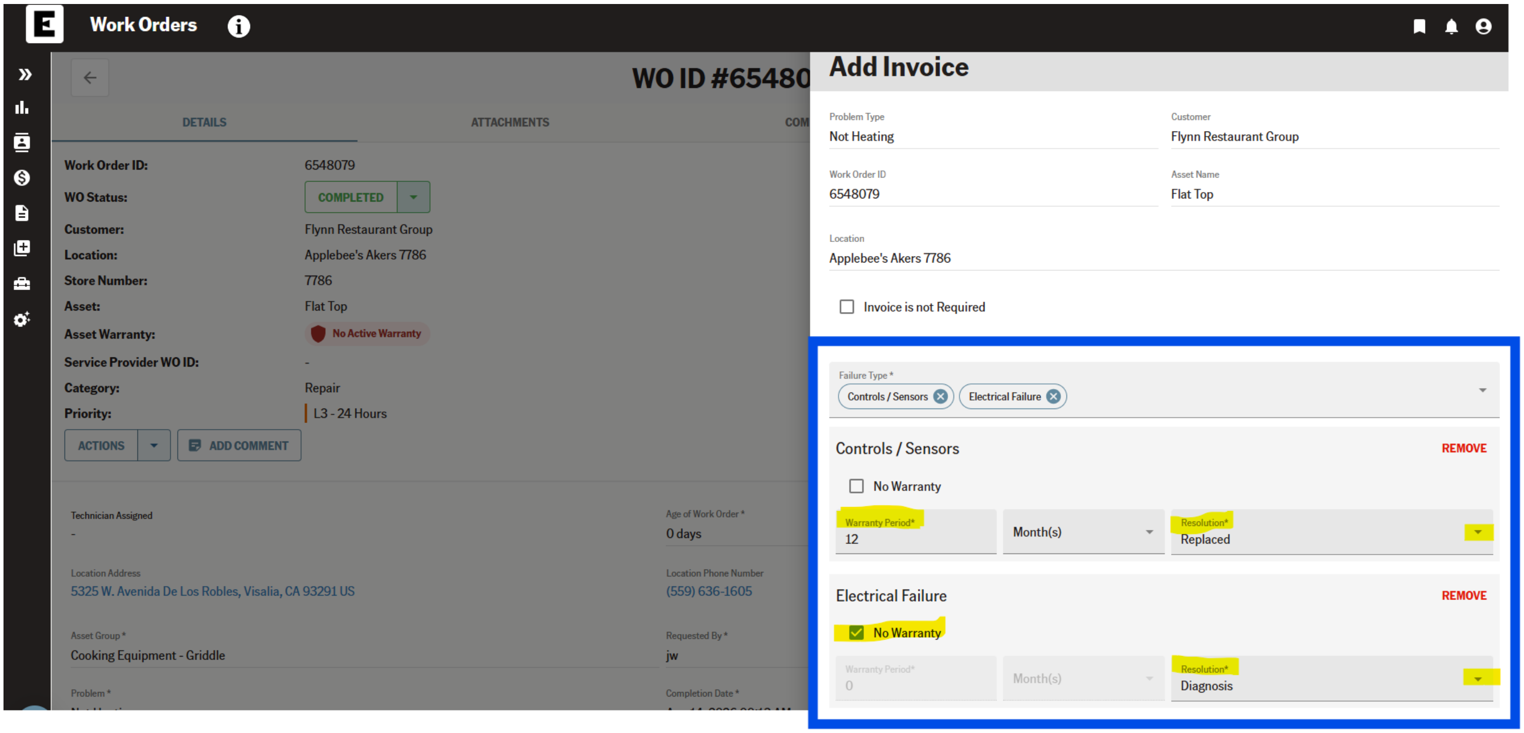
7. Select the drop-down arrow next to **Actions**, a drop-down menu will appear, giving you the option to **Add Invoice**.



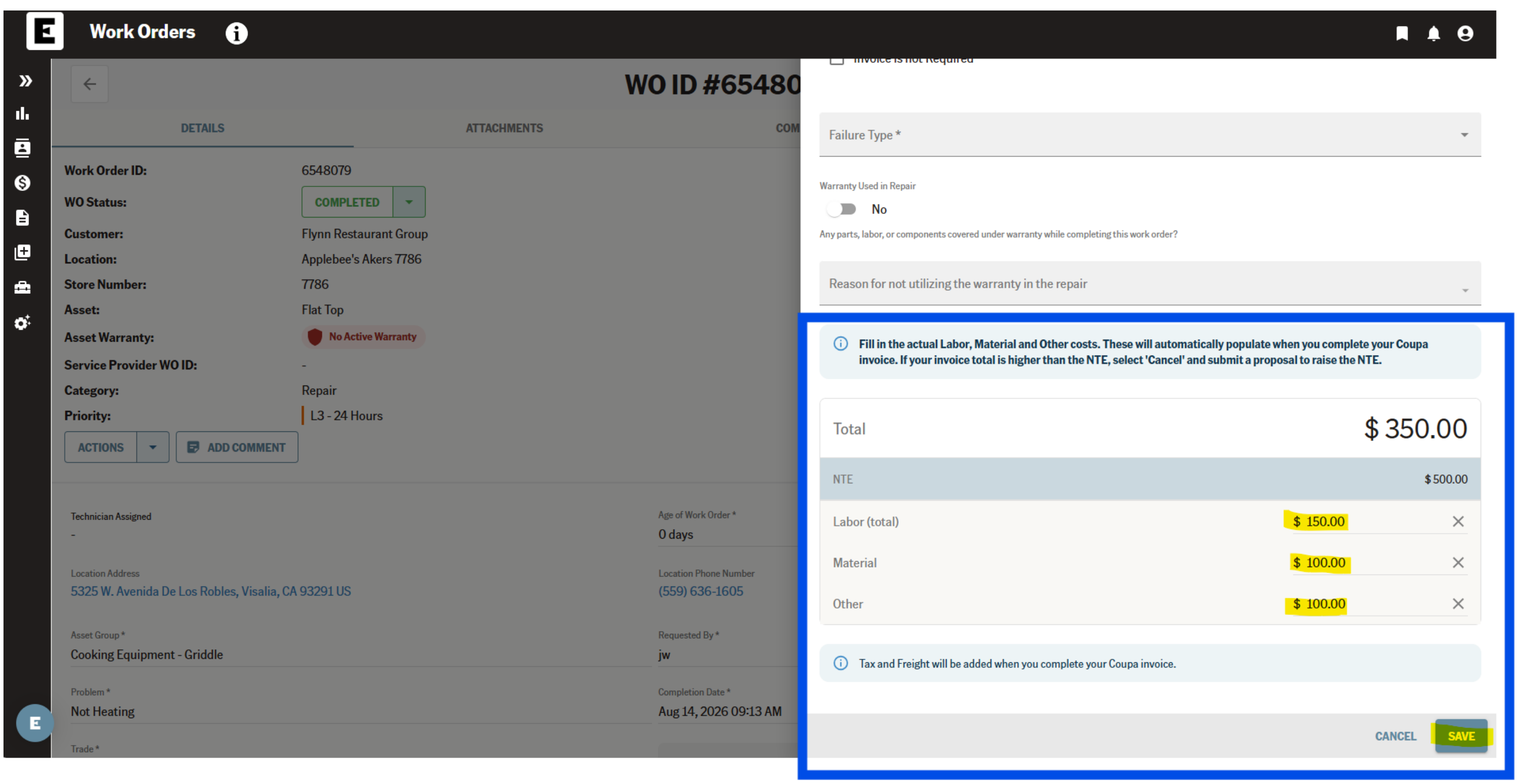
8. Select the appropriate **Failure Type/s** from the Failure Type drop down list.



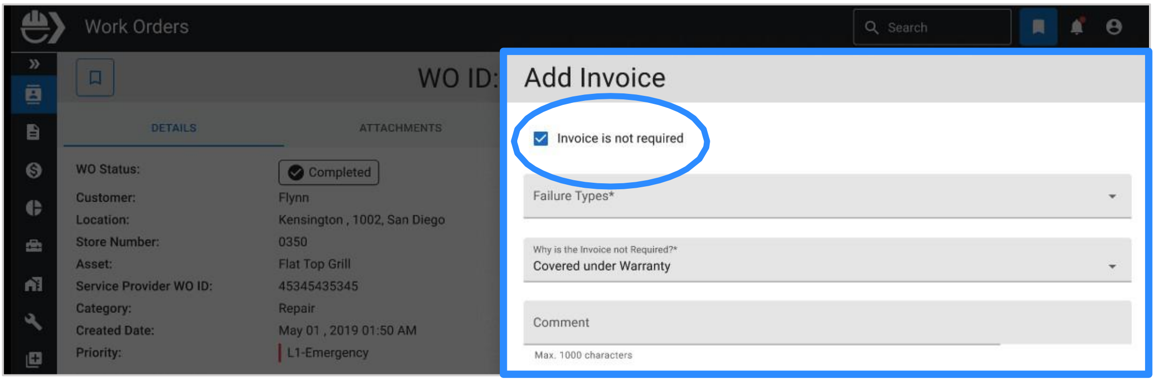
9. Add your **Resolution** by Failure Type and if the Repair has a **Warranty** applied, add that information.



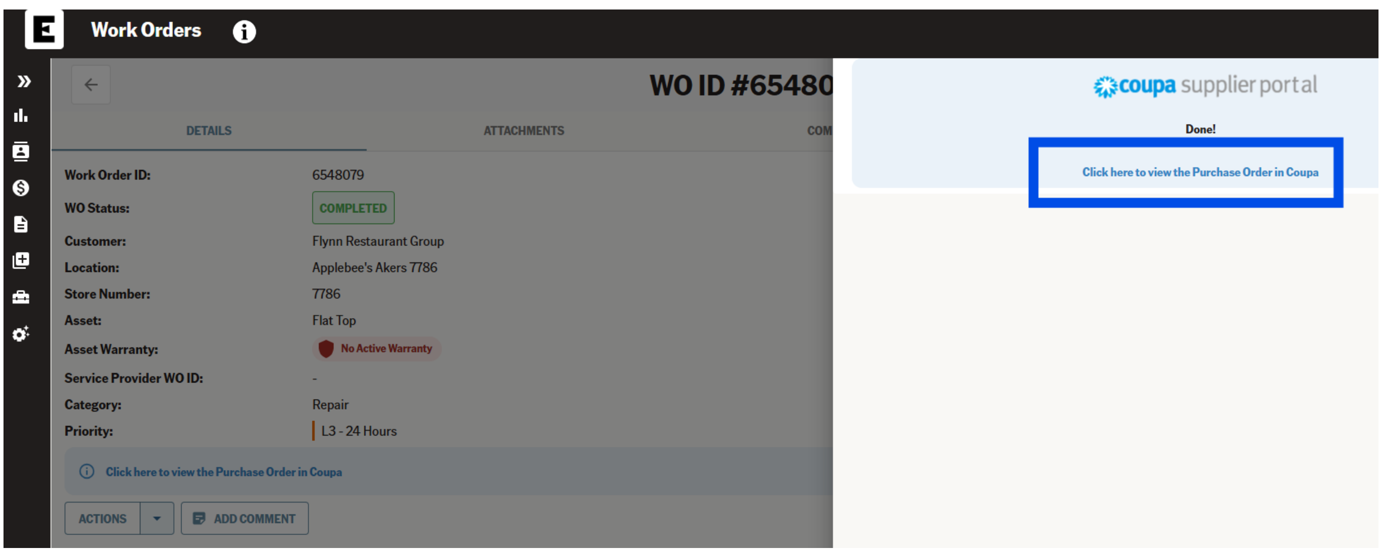
10. Fill in the total of your **Labor, Material, Other** costs and select **Save**. These costs will populate within your Coupa Invoice. Any tax or freight charges are NOT entered in Ecotrak but can be added while finalizing the Coupa invoice. If your invoice total is higher than the NTE, select Cancel and submit a Proposal (steps 4 & 5) to raise the NTE.



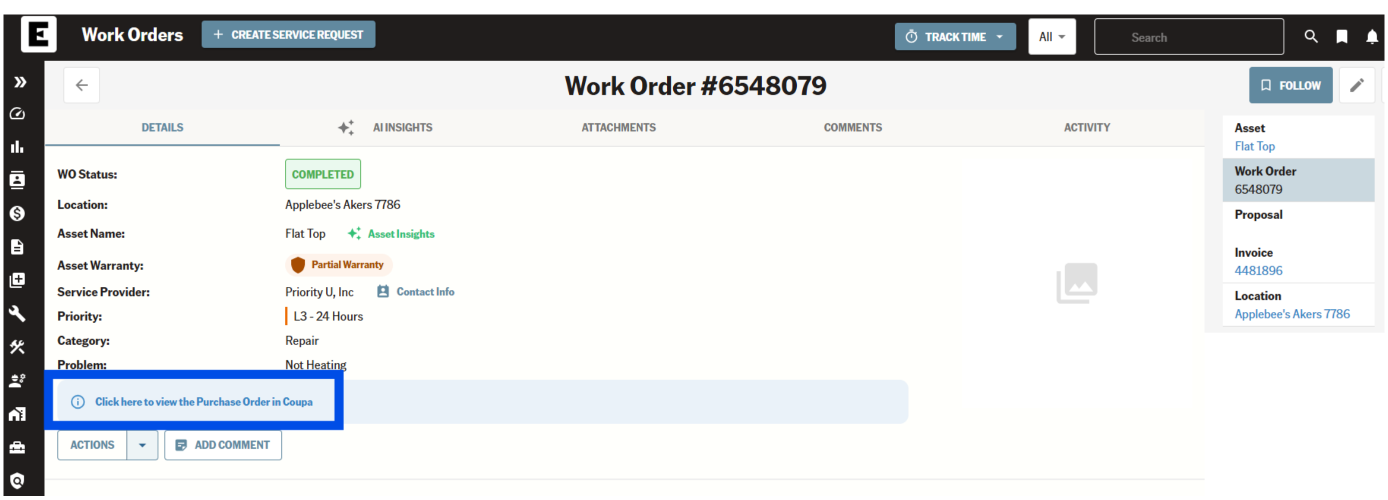
NOTE: If an invoice is not required in situations where the warranty covered the entire cost, check the **"Invoice is not Required"** box and fill out why the invoice was not required. In this case, it was covered under a warranty. You can also add comments.



11. Select **Click here to view the Purchase Order in Coupa** to login to Coupa and complete your invoice for payment and select **Done.** You can also login from the work order too.

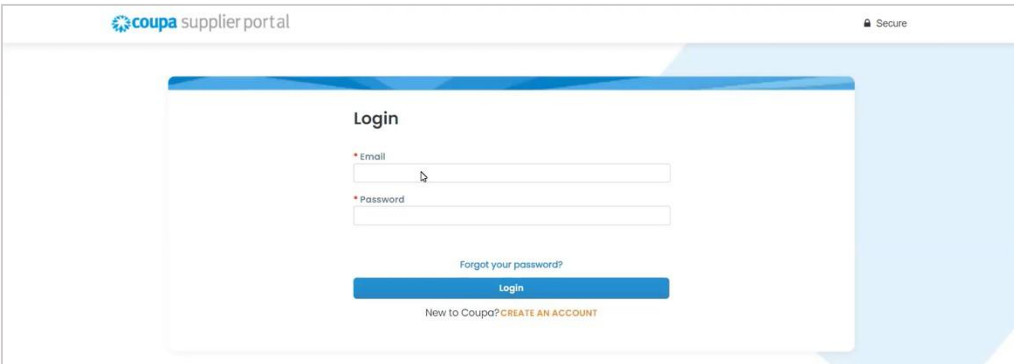


OR

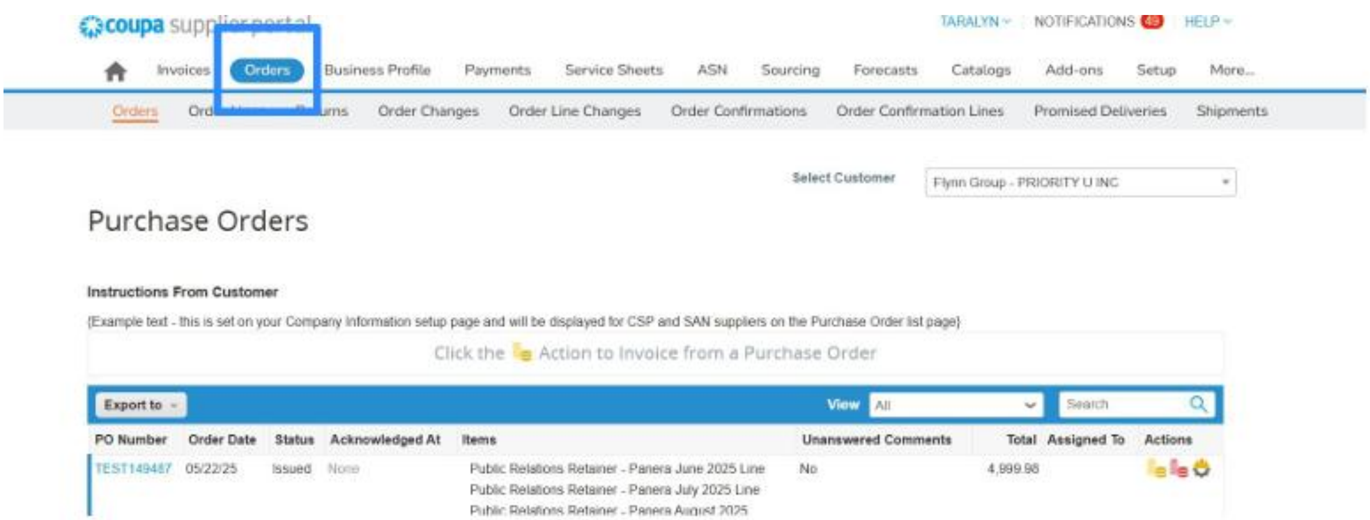


STEP 2: Create an Invoice

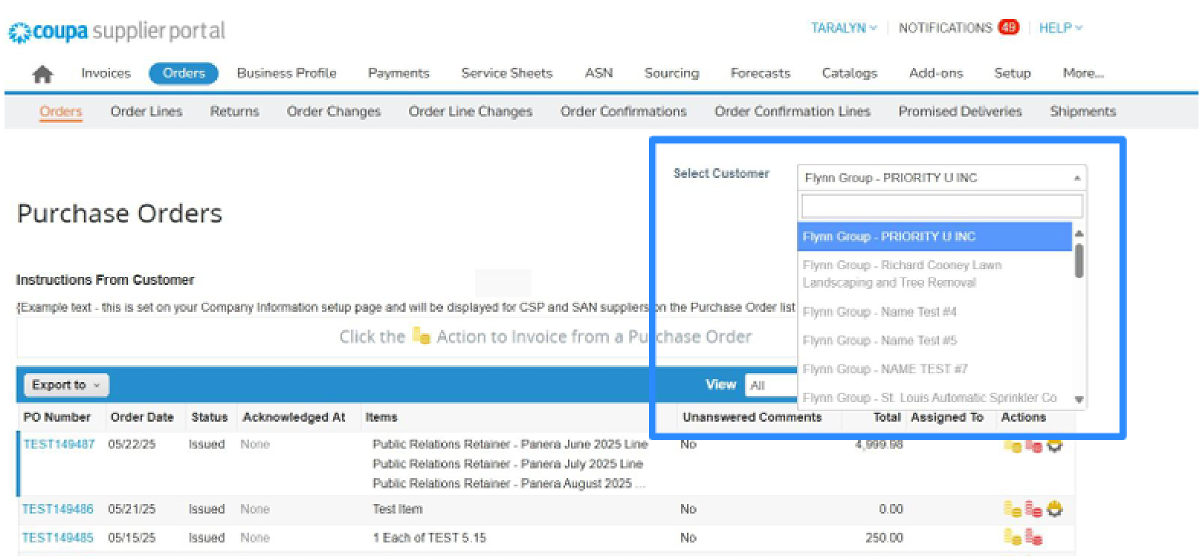
12. Login to the Coupa Supplier Portal.



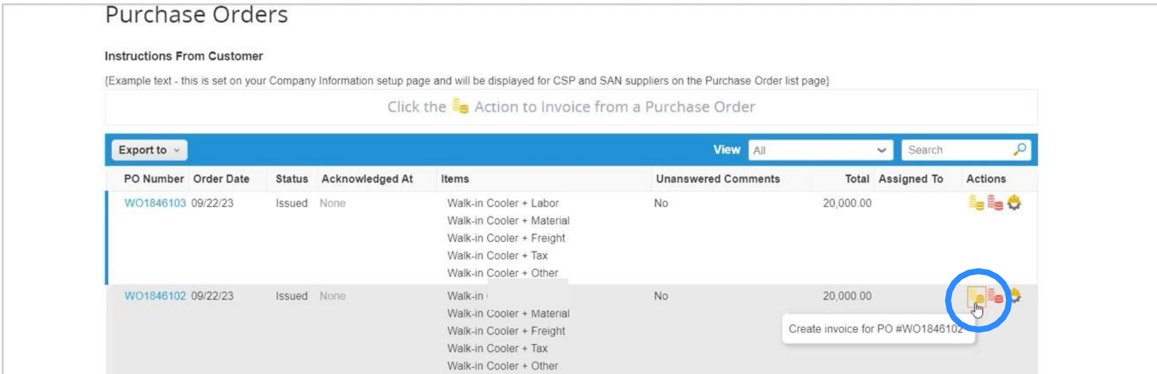
13. Select Orders from the top of the Navigation.



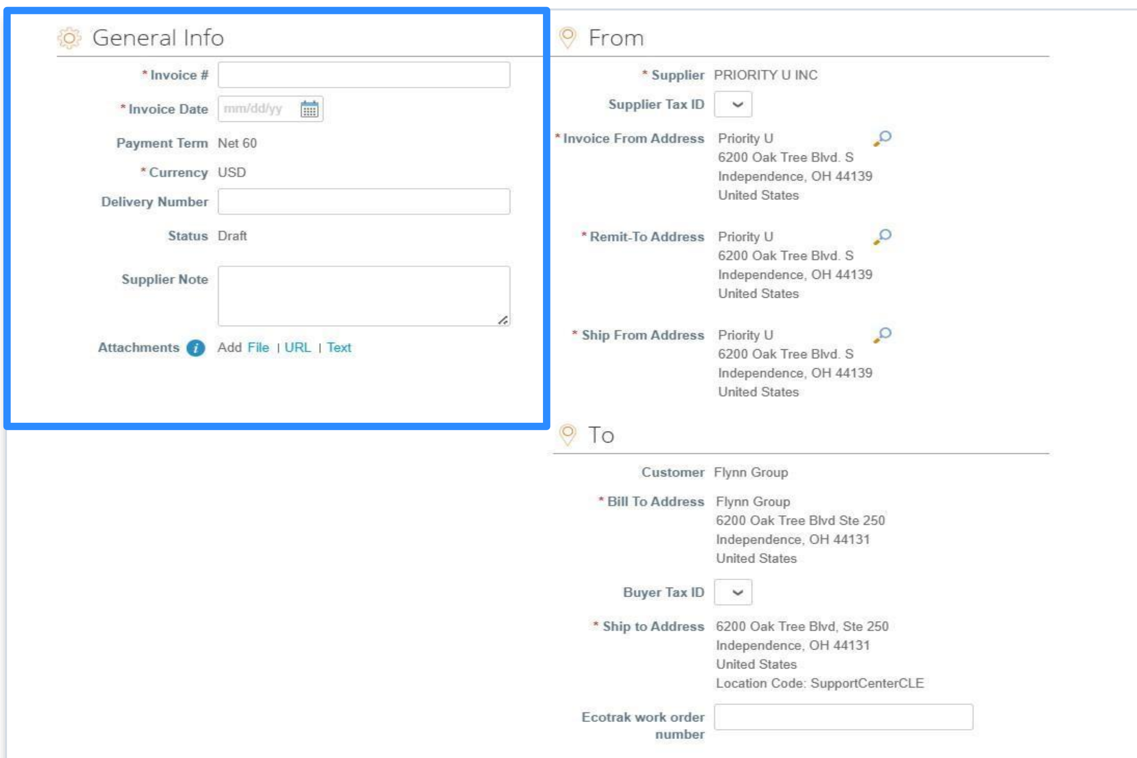
14. Click on Select Customer to select your customer.



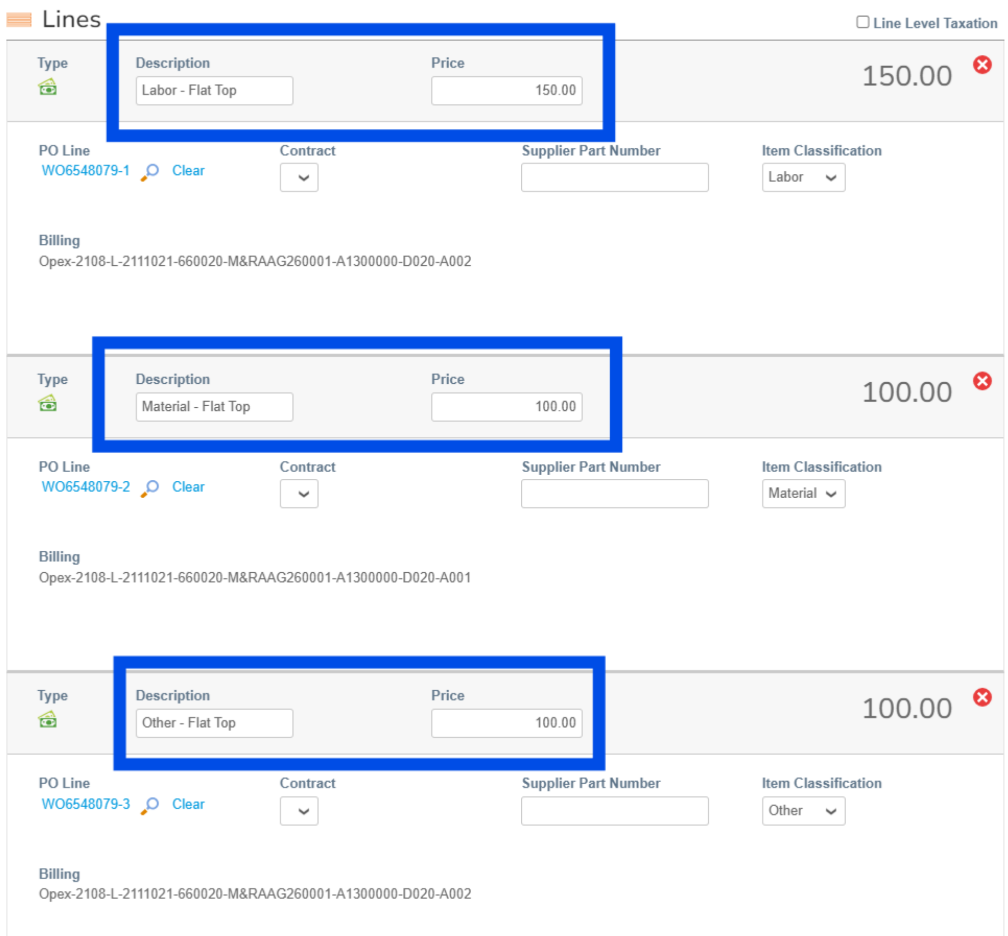
15. Find the Work Order or PO Number and select the **Gold Coin Icon** labeled **"Create Invoice for PO #".** Please note that your Work Order will become your PO number in Coupa. Note: if the amount displayed on the WO/PO line is different from the amount you invoice, you can modify it.



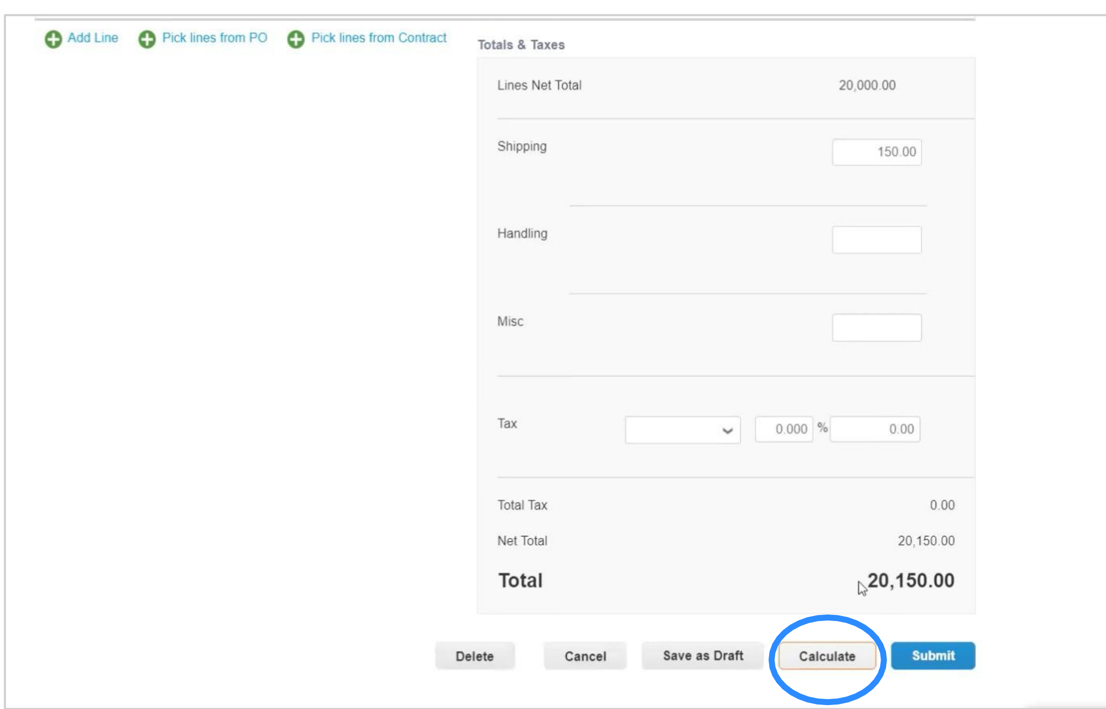
16. Under **General Info**, Add your **Invoice Number**, **Invoice Date, Notes** and the PDF invoice image within **Attachments**. The From and To fields will automatically populate your information from the Coupa portal and do not need to be changed.



17. When you scroll down the page, you will see all the individual line items associated with an invoice (Labor, Material, Other). Each invoice line will **prepopulate the amounts which were added in Ecotrak during the *'add invoice'* step**. If the line item totals are correct go to the next step. If you need to edit the price for any line item, you can do so.



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



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