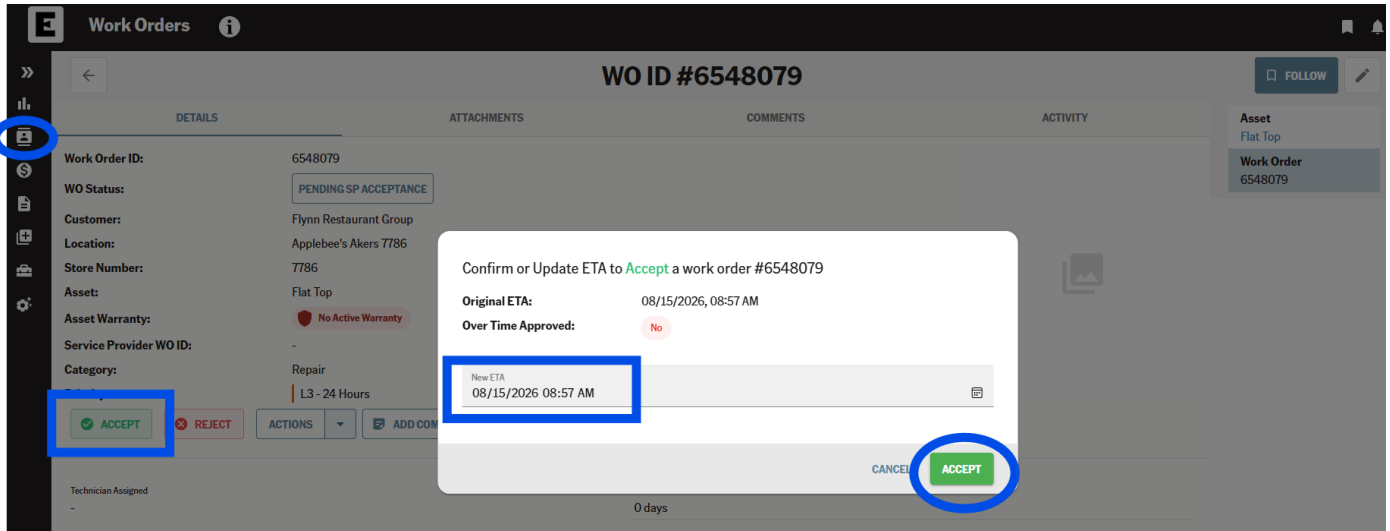




# User Guide for Service Providers

## 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.



- 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**

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** (dropdown menu open):  
 Add Proposal (highlighted)  
 Print Work Order  
 Update ETA  
 REASSIGN  
 ADD COMMENT

**ATTACHMENTS**

**COMMENTS**

**ACTIVITY**

Asset: GU Sink  
 Work Order: 3912025

Allocated Inventory  
 + ALLOCATE INVENTORY

Age of Work Order: 2

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

Asset Group: Sinks

- 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**

**WO ID: 1846102**

**DETAILS**

WO Status: **Arrived**  
 Customer: Flynn  
 Location: Kensington, 1002, San Diego  
 Store Number: 0350  
 Asset: Flat Top Grill  
 Service Provider WO ID: 45345435345  
 Category: Repair  
 Created Date: May 01, 2019 01:50 AM  
 Priority: L1-Emergency

**ATTACHMENTS**

**COMMENTS**

**ACTIVITY**

Technician Assigned: Arlene McCoy  
 Asset Group: Cooking Equipment  
 Trade: Plumber  
 Problem: Not Heating  
 NTE: \$ 250.00  
 Phone Number: (572) 453 44 24  
 Address: Store #9988, 1176 Hwy 95, Bullhead City, Arizona, 86442

**Add Proposal**

Asset: Beverage Cooler / Under Counter  
 Work Order ID: 1846102  
 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, select **Complete** from the **WO Status** drop down selections.

The screenshot shows the 'Work Orders' interface for WO ID #6548079. The 'DETAILS' tab is active. The 'WO Status' dropdown menu is open, showing options: 'ARRIVED', 'Complete', 'Submitting Proposal', 'Pending Parts', and 'Return Visit Required'. A blue arrow points to the 'Complete' option. The 'Asset' section on the right shows 'Flat Top' and 'Work Order 6548079'.

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

The screenshot shows the 'Work Orders' interface for WO ID #6548079. The 'WO Status' is now 'COMPLETED'. The 'Actions' dropdown menu is open, showing options: 'Add Invoice', 'Add Proposal', and 'Print Work Order'. A blue arrow points to the 'Add Invoice' option. The 'Asset' section on the right shows 'Flat Top' and 'Work Order 6548079'.

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

The screenshot shows the 'Add Invoice' form. The 'Failure Type' dropdown menu is open, showing options: 'Controls / Sensors' and 'Electrical Failure'. A blue arrow points to the 'Electrical Failure' option. The form also includes fields for 'Problem Type' (Not Heating), 'Customer' (Flynn Restaurant Group), 'Work Order ID' (6548079), 'Asset Name' (Flat Top), and 'Location' (Applebee's Akers 7786).

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

Work Orders

WO ID #65480

DETAILS

ATTACHMENTS

Work Order ID:

6548079

WO Status:

COMPLETED

Customer:

Flynn Restaurant Group

Location:

Applebee's Akers 7786

Store Number:

7786

Asset:

Flat Top

Asset Warranty:

No Active Warranty

Service Provider WO ID:

-

Category:

Repair

Priority:

L3 - 24 Hours

TECHNICIAN ASSIGNED

Age of Work Order \*

5325 W. Avenida De Los Robles, Visalia, CA 93291 US

Location Phone Number

Asset Group \*

Requested By \*

Cooking Equipment - Griddle

jw

Problem \*

Completion Date \*

Not Heating

Aug 14, 2026 09:13 AM

Add Invoice

Problem Type

Customer

Work Order ID

Asset Name

Location

Invoice is not Required

Failure Type \*

Controls / Sensors

Electrical Failure

No Warranty

Warranty Period \*

Month(s)

Resolution \*

Replaced

No Warranty

Warranty Period \*

Month(s)

Resolution \*

Diagnosis

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.

Work Orders

WO ID #65480

DETAILS

ATTACHMENTS

Work Order ID:

6548079

WO Status:

COMPLETED

Customer:

Flynn Restaurant Group

Location:

Applebee's Akers 7786

Store Number:

7786

Asset:

Flat Top

Asset Warranty:

No Active Warranty

Service Provider WO ID:

-

Category:

Repair

Priority:

L3 - 24 Hours

TECHNICIAN ASSIGNED

Age of Work Order \*

5325 W. Avenida De Los Robles, Visalia, CA 93291 US

Location Phone Number

Asset Group \*

Requested By \*

Cooking Equipment - Griddle

jw

Problem \*

Completion Date \*

Not Heating

Aug 14, 2026 09:13 AM

Failure Type \*

Warranty Used in Repair

Reason for not utilizing the warranty in the repair

Fill in the actual Labor, Material and Other costs. These will automatically populate when you complete your Coupa Invoice. If your invoice total is higher than the NTE, select 'Cancel' and submit a proposal to raise the NTE.

Total

\$ 350.00

NTE

\$ 500.00

Labor (total)

\$ 150.00

Material

\$ 100.00

Other

\$ 100.00

Tax and Freight will be added when you complete your Coupa invoice.

CANCEL

SAVE

**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.



### 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<br>Public Relations Retainer - Panera July 2025 Line<br>Public Relations Retainer - Panera August 2025 | No                  | 4,999.98 |             |         |

### 14. Click on Select Customer to select your customer.

Select Customer

- Flynn Group - PRIORITY U INC
- Flynn Group - Richard Cooney Lawn Landscaping and Tree Removal
- Flynn Group - Name Test #4
- Flynn Group - Name Test #5
- Flynn Group - NAME TEST #7
- Flynn Group - St. Louis Automatic Sprinkler Co

| 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<br>Public Relations Retainer - Panera July 2025 Line<br>Public Relations Retainer - Panera August 2025 ... | No                  | 4,999.98 |             |         |
| TEST149486 | 05/21/25   | Issued | None            | Test Item                                                                                                                                                    | No                  | 0.00     |             |         |
| TEST149485 | 05/15/25   | Issued | None            | 1 Each of TEST 5.15                                                                                                                                          | No                  | 250.00   |             |         |
| TEST149472 | 05/08/25   | Issued | None            | 1 Each of Super Lube                                                                                                                                         | No                  | 25.17    |             |         |

- 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.

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

| 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<br>Walk-in Cooler + Material<br>Walk-in Cooler + Freight<br>Walk-in Cooler + Tax<br>Walk-in Cooler + Other | No                  | 20,000.00 |             |                                   |
| WO1846102 | 09/22/23   | Issued | None            | Walk-in<br>Walk-in Cooler + Material<br>Walk-in Cooler + Freight<br>Walk-in Cooler + Tax<br>Walk-in Cooler + Other                | No                  | 20,000.00 |             |  Create invoice for PO #WO1846102 |

- 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.

**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

- 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.

**Lines** ☐ Line Level Taxation

|      |                  |        |        |
|------|------------------|--------|--------|
| Type | Description      | Price  | 150.00 |
|      | Labor - Flat Top | 150.00 |        |

PO Line WO6548079-1 [Clear](#) Contract  Supplier Part Number  Item Classification Labor

Billing  
Opex-2108-L-2111021-660020-M&RAAG260001-A1300000-D020-A002

---

|      |                     |        |        |
|------|---------------------|--------|--------|
| Type | Description         | Price  | 100.00 |
|      | Material - Flat Top | 100.00 |        |

PO Line WO6548079-2 [Clear](#) Contract  Supplier Part Number  Item Classification Material

Billing  
Opex-2108-L-2111021-660020-M&RAAG260001-A1300000-D020-A001

---

|      |                  |        |        |
|------|------------------|--------|--------|
| Type | Description      | Price  | 100.00 |
|      | Other - Flat Top | 100.00 |        |

PO Line WO6548079-3 [Clear](#) Contract  Supplier Part Number  Item Classification Other

Billing  
Opex-2108-L-2111021-660020-M&RAAG260001-A1300000-D020-A002

**18.** Within **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             | <input type="button" value="v"/> 0.000 % 0.00 |
| Total Tax       | 0.00                                          |
| Net Total       | 20,150.00                                     |
| <b>Total</b>    | <b>20,150.00</b>                              |

- 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.

+ 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        |
| <b>Total</b>    | <b>20,150.00</b> |

Delete
Cancel
Save as Draft
Calculate
Submit

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

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: \$3,000.00
Material: \$1,000.00
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