

Eaco: Establish a Supplier Network

USER GUIDE

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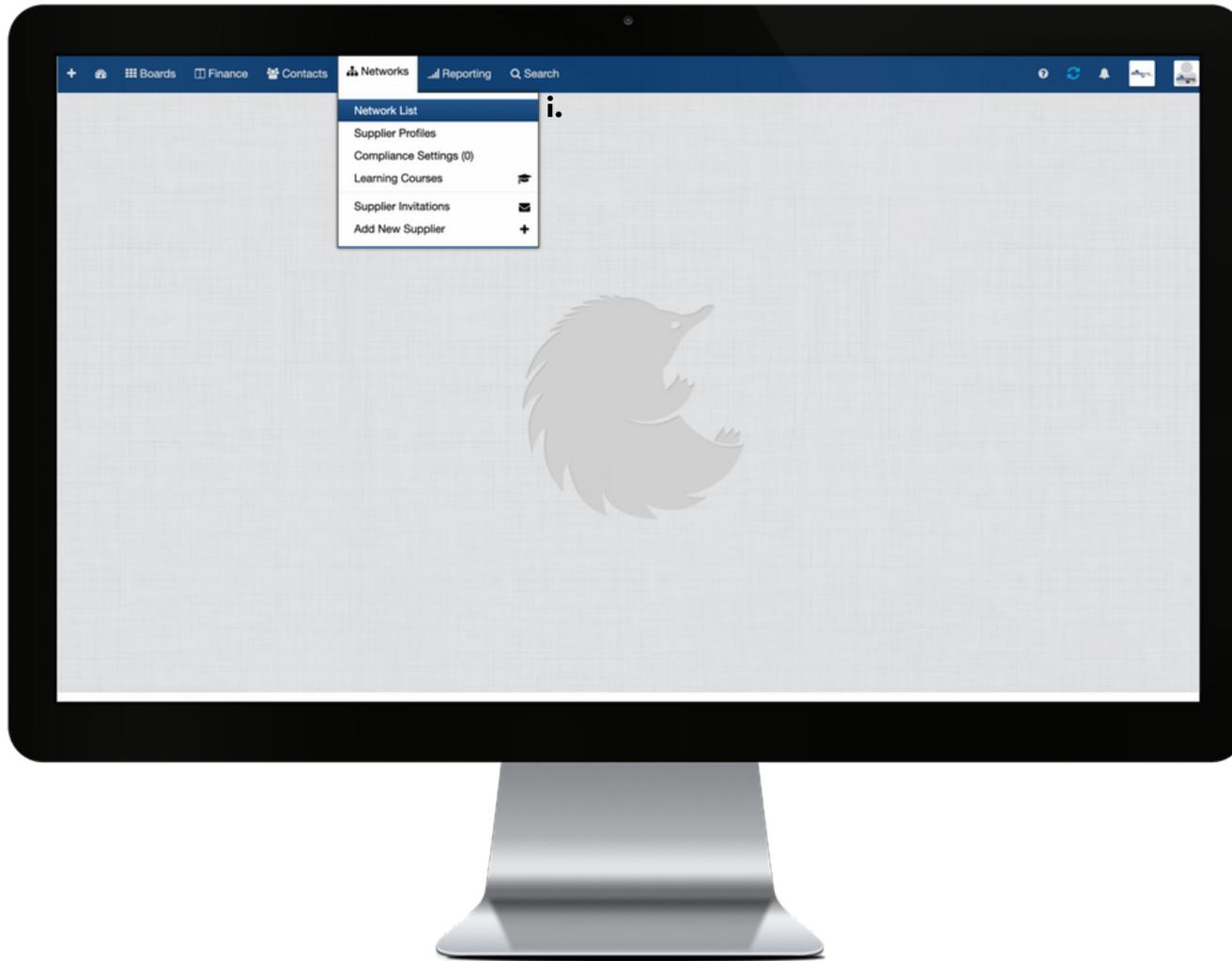
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1. GET STARTED



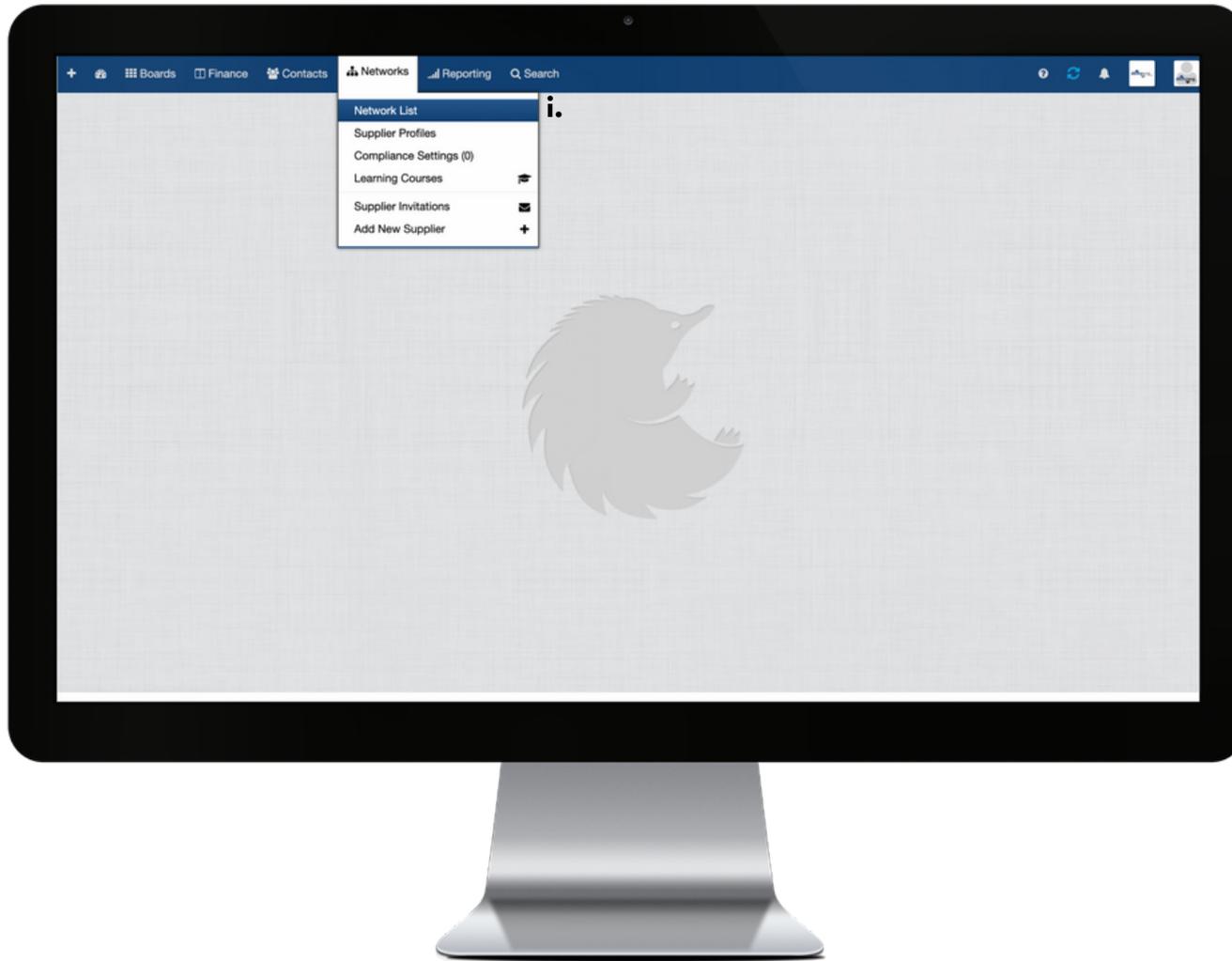
Establish a Supplier Network via your organisation's Networks module, which is accessible as a main menu item of the Eaco Control Centre's navigation bar.

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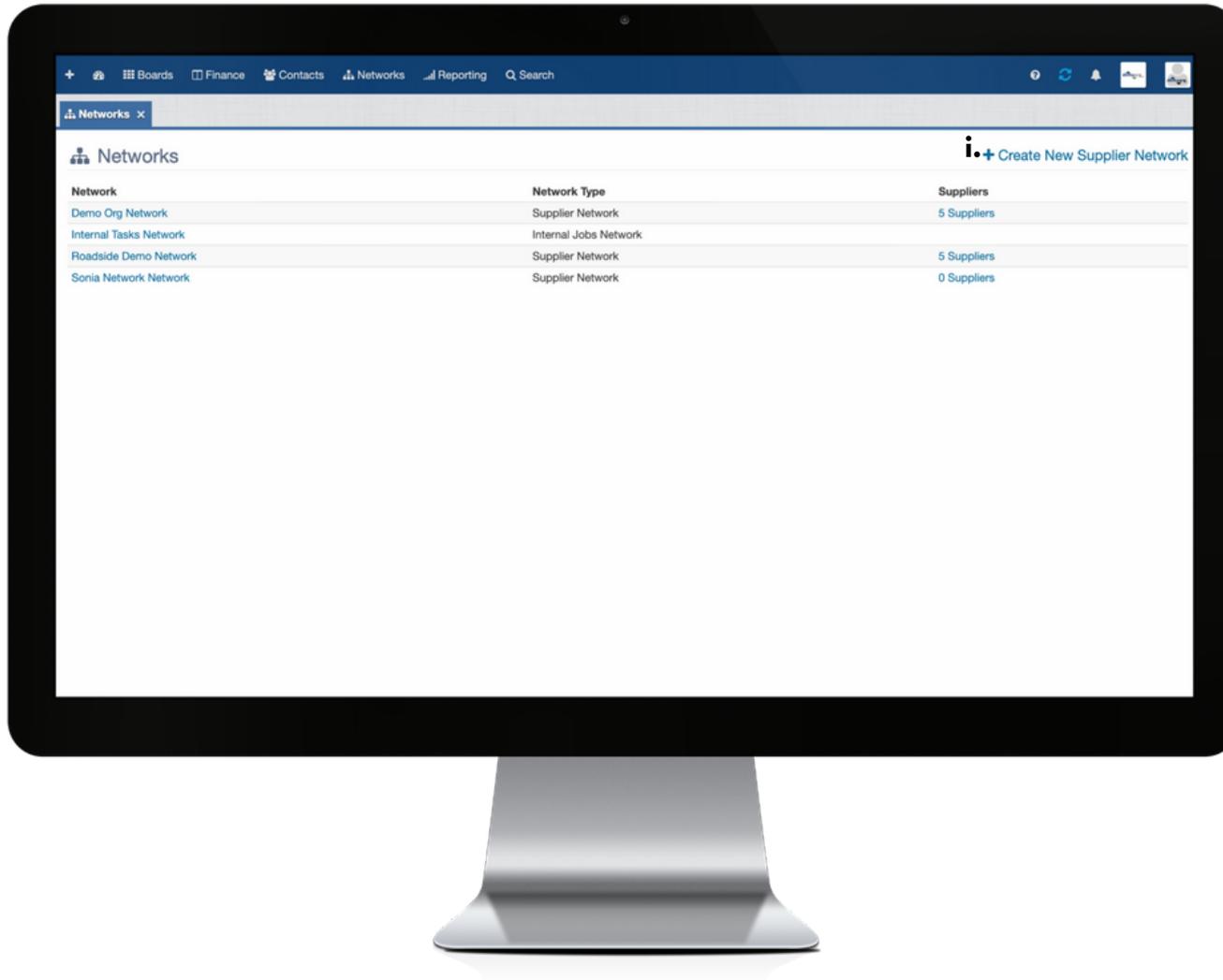


2. CREATE A NEW/EDIT A SUPPLIER NETWORK

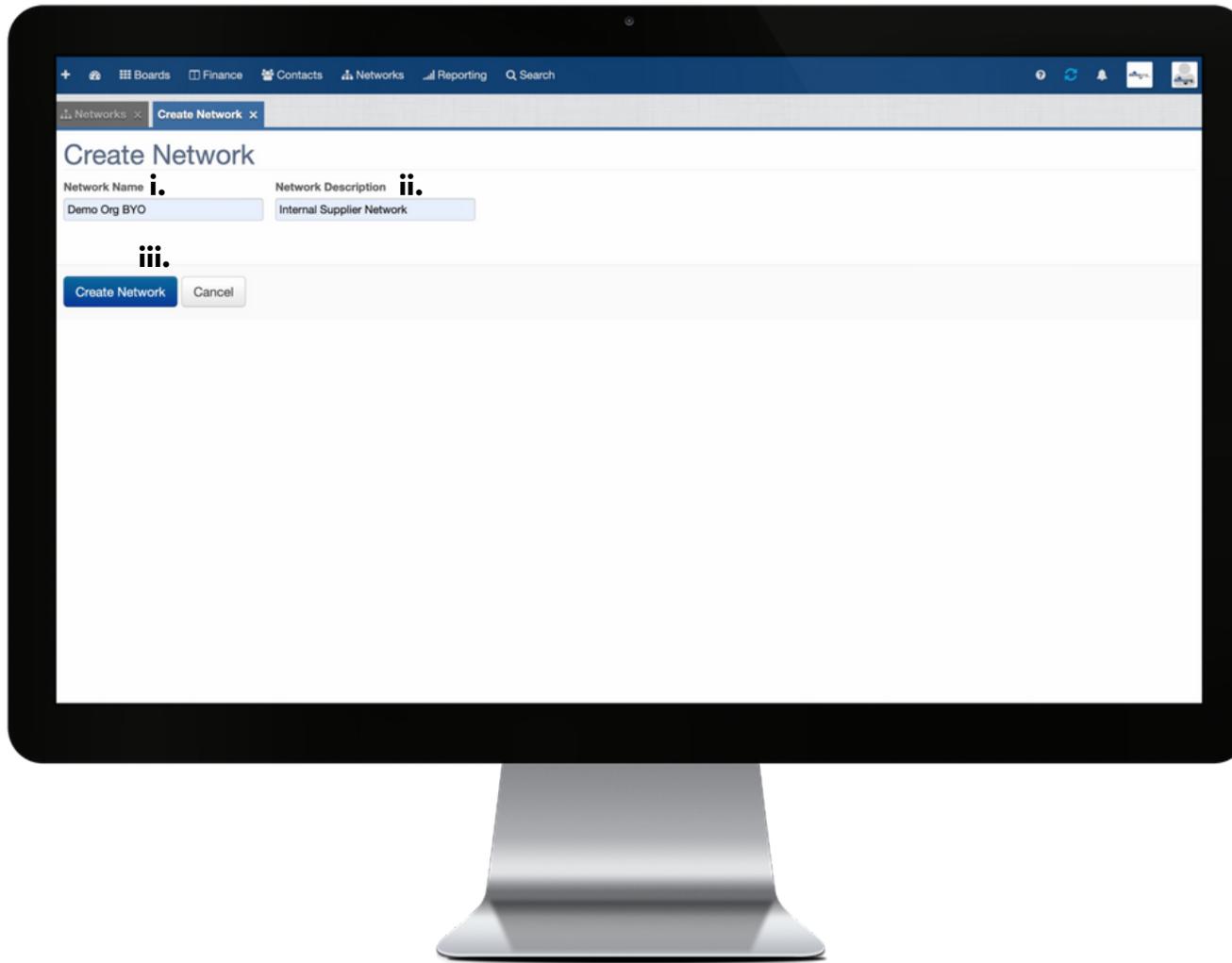




Click on the Networks menu in the Control Centre and then select the Network List from within the drop down menu (i).



i: click the + icon to open the Create New Supplier Network dialog box.

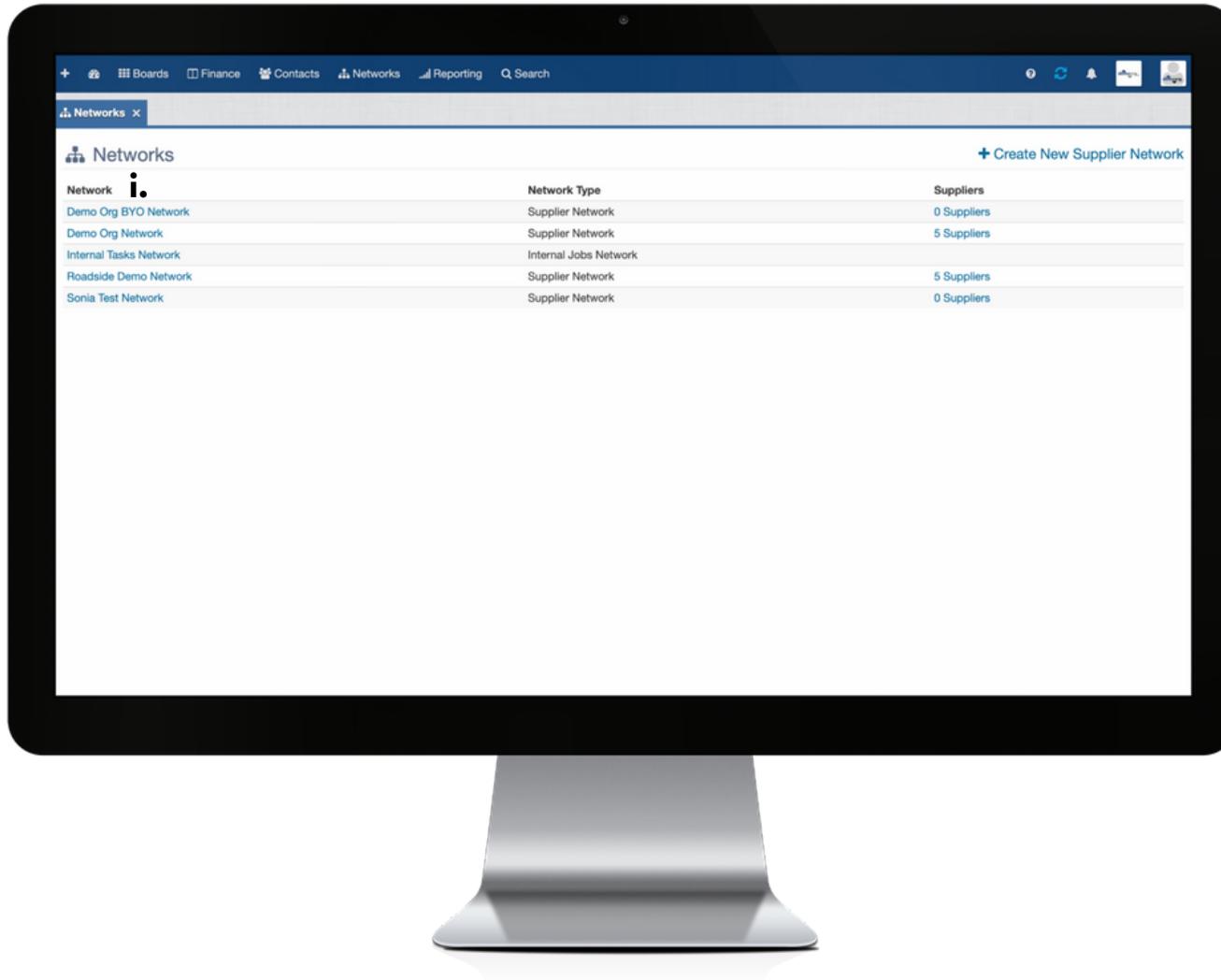


i: enter the name of the Supplier Network to be established.

ii: enter a description for the Supplier Network to be established.

iii: click the Create Network button to confirm the establishment of the Supplier Network.

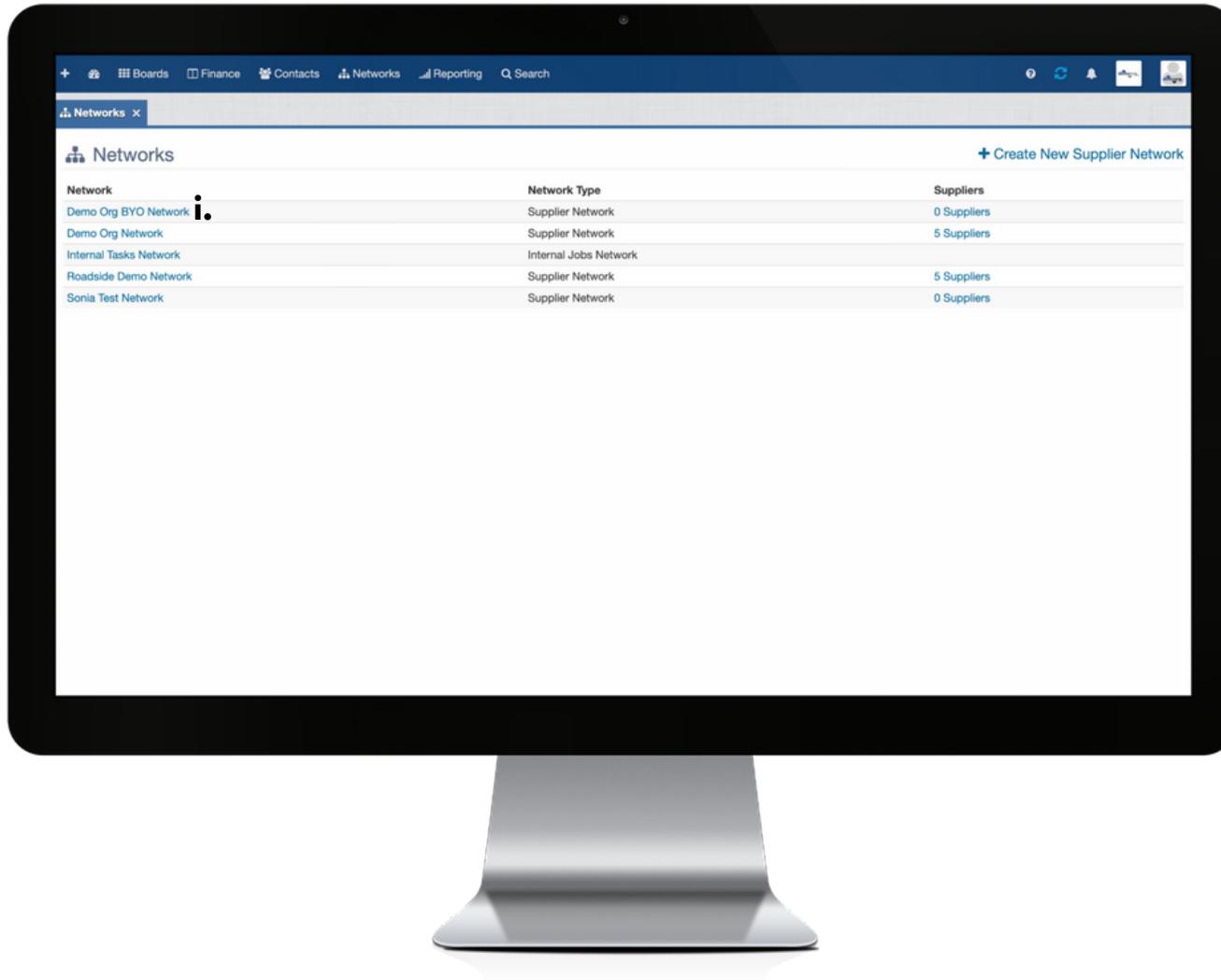
Tip: in order to create and name a Supplier Network for the management of internal ("Bring Your Own") jobs, we suggest you adopt the following naming convention -for the Network Name, make it, **[Business Name] BYO** and for the Network Description label it as **Internal Supplier Network**.



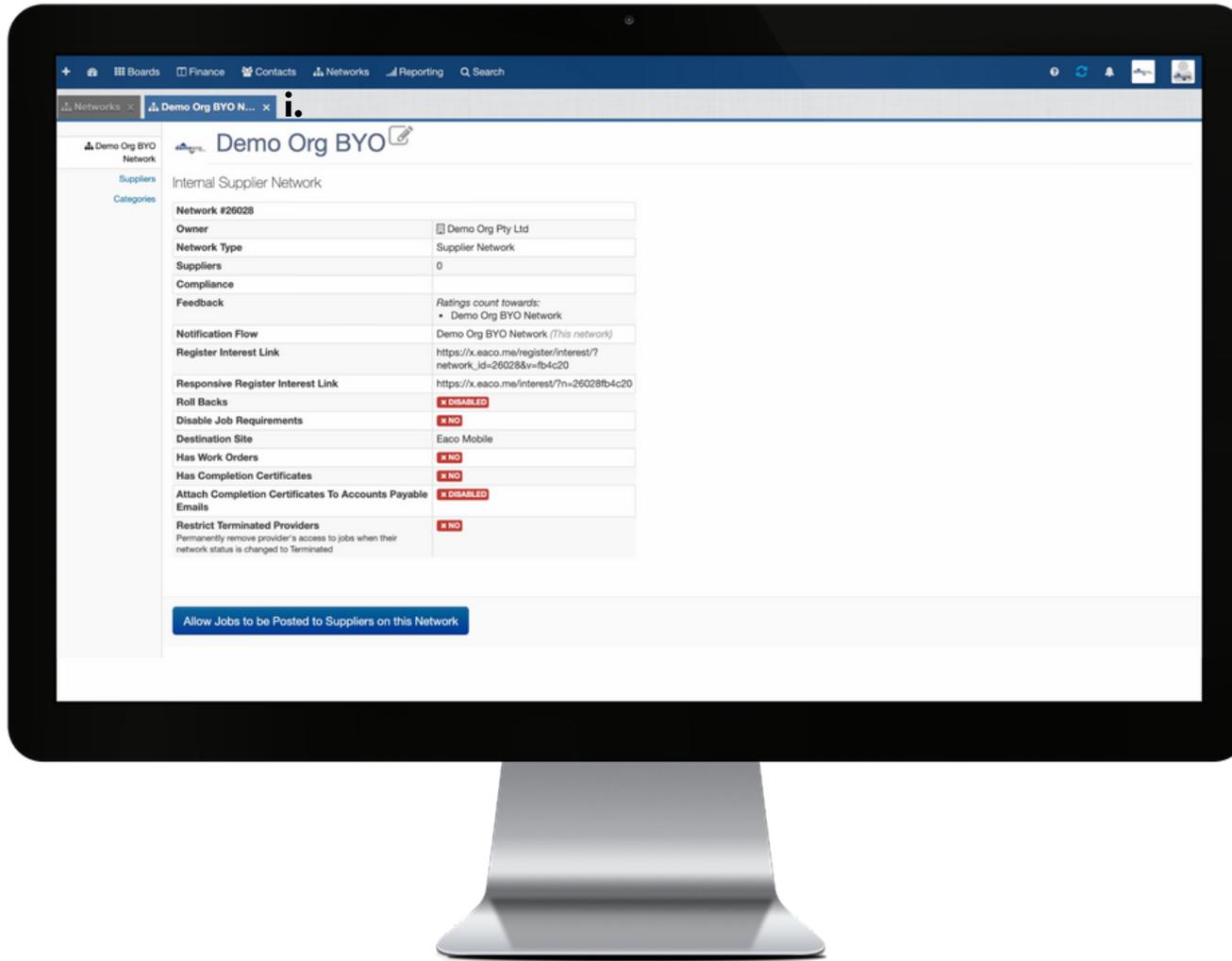
i: the newly created Supplier Network, will appear in your Networks List (accessible via the Networks menu in your Eaco Control Centre's navigation bar).

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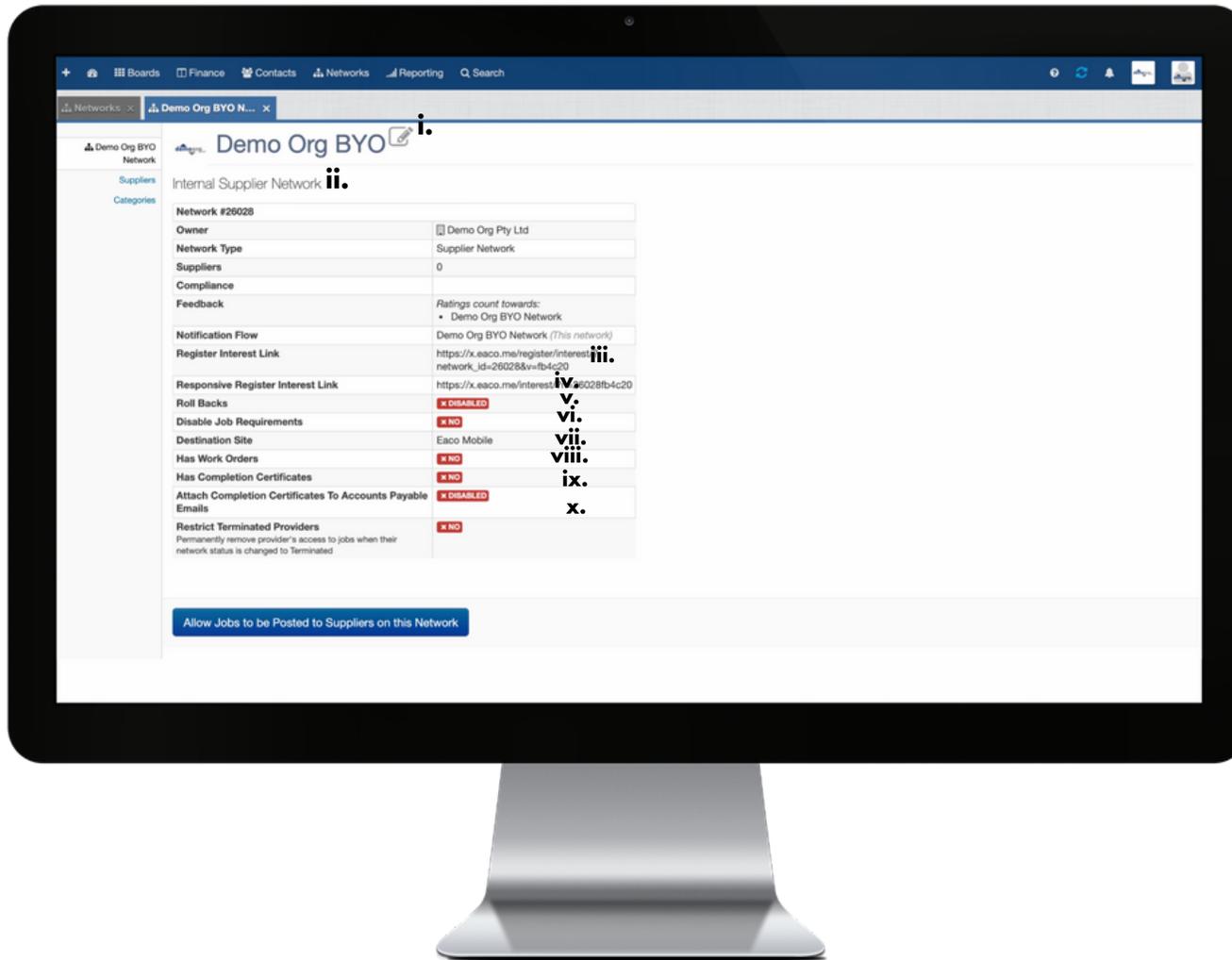
3. CONFIGURE/EDIT SETTINGS FOR A SUPPLIER NETWORK



i: to configure or edit settings for a Supplier Network, click on the Name of the Supplier Network from within your Network List.



i: upon clicking on the Name of the Supplier Network listed, the settings dialog box will appear in a new tab.



i: editable Supplier Networks fields will reveal an Edit tool button when you hover to the right of the field box - click the field or hover your mouse over to the right of the field box and click the Edit tool icon to edit the field accordingly.

Note: see following page for Legend for fields i. to x.

i. Network Name

ii. Network Description

iii. Register Interest Links - these are links that you can email to invite Suppliers that are not currently using the Eaco System, to join your Supplier Network.

Note: it is beneficial for all members of your Supplier Network to be registered to use Eaco, however, those Suppliers that join your Network via a Register Interest Link will be listed with an "Awaiting Approval" status and they will not receive job offers automatically until you have changed their status to "Active".

iv. Roll Backs - the Roll Backs functionality relates to granting permission to a Supplier that has accepted a job, to re-release it (i.e. roll back their acceptance).

v. Disable Job Requirements - provides the option to enforce or dismiss the attachment of the Network's compliance rules on the jobs.

Note: Activating the Disabling Job Requirements option still enables you to assign jobs to non-compliant suppliers. Whilst Suppliers will still see whether they are compliant or not based on your Network's compliance rules, this functionality bypasses the need to meet compliance requirements at the point of job acceptance. The Supplier will be able to finalise their profile to confirm they are compliant at a later stage of the process. The Eaco System's flexibility in this regard can be particularly useful in the case of establishing a new Supplier Network - it enables you the opportunity to keep business running as usual whilst your suppliers organise the uploading of their relevant compliance documentation (reminders will be set to serve as a follow up on suppliers whose compliance documentation remains outstanding).

vi. Destination Site - when the system send a User an email containing a link in relation to a job, the job details will open up in Eaco's Mobile Web Portal.

vii. Has Work Orders - enabling this functionality is required for the generation of a Work Order when a Supplier accepting a quote or accepting "Do & Charge" job.

Note: Marking this setting with a No, will mean a Work Order for the Supplier accepting a quote or a job will not be generated, however, they will receive confirmation of their acceptance of the quote or job.

viii. Has Completion Certificates - enabling this functionality is required for the generation of a Completion Certificate when a job has been completed.

Note: Marking this setting with a No, will mean a Completion Certificate will not be generated upon completion of a job.

ix. Attach Completion Certificates to Accounts Payable Emails - enabling this functionality is required in order to include the Completion Certificate with the invoice to be emailed for the completed job. Disabling this functionality will result in the exclusion of the Completion Certificate when an invoice for a completed job is emailed.

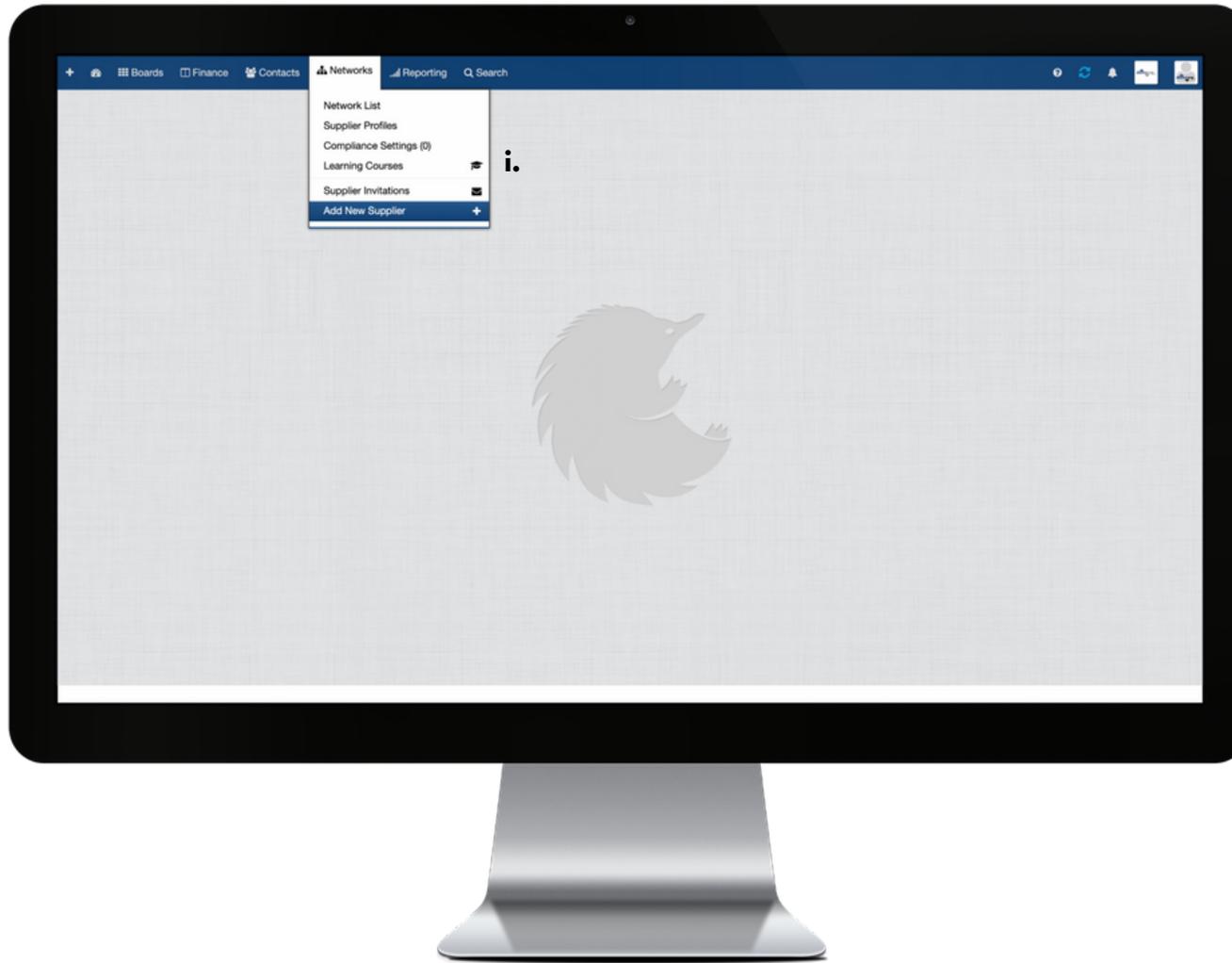
Note: to utilise this function, your organisation's Quotes and Invoices settings will need to be configured to establish your Accounts Payable group.

x. Restrict Terminated Providers - this provides you with the option to permanently remove a Supplier's access to jobs upon changing their network status to Terminated.

Note: this is useful to prevent an old Supplier, when logging into Eaco, from being able to see details of jobs they never accepted from you (e.g. customers and job details).

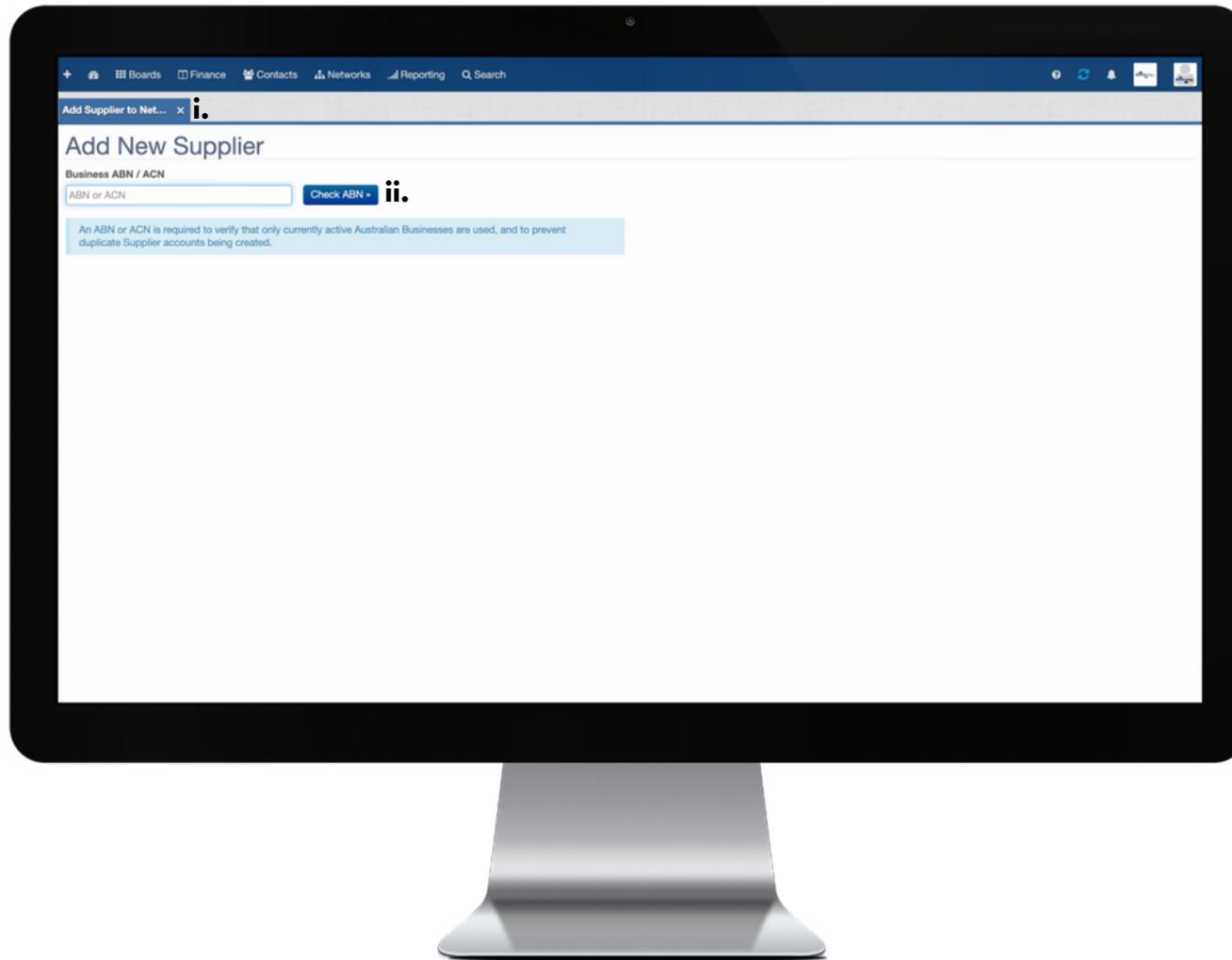
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4. ADDING SUPPLIERS TO YOUR SUPPLIER NETWORK



Adding Suppliers to a Supplier Network can be done via your organisation's Networks module, which is accessible as a main menu item of the Eaco Control Centre's navigation bar.

Click on the Networks menu in the Control Centre and then select Add New Supplier from within the drop down menu (i).



- i:** upon clicking on Add New Supplier, an Add New Supplier form will appear in a new tab.
- ii:** to commence, supply the Supplier's ABN or ACN, then click the Check ABN button. The Add Supplier to Network settings dialog box will then appear (see following page).

Add Supplier to Net...

Add New Supplier

Business ABN / ACN

84 627 232 553

This Supplier does not have an existing Eaco account.
An Eaco account will be created for the Supplier when you add them to one of your Networks.

Supplier

Registered Name
PAPPYON PTY LTD

Contact person:
Given name: Family name:

Trading Name
Pappyon

Email address:

Address

Mobile number:

Suburb / Postcode:
Start typing a suburb name...

Alternate phone number:

Network Details

A new profile will automatically be created for this Supplier using:
– the Locations around the Suburb specified above
– the Network specified below
– the Master Categories specified below

Join Network
Demo Org BYO

Initial Status
Active

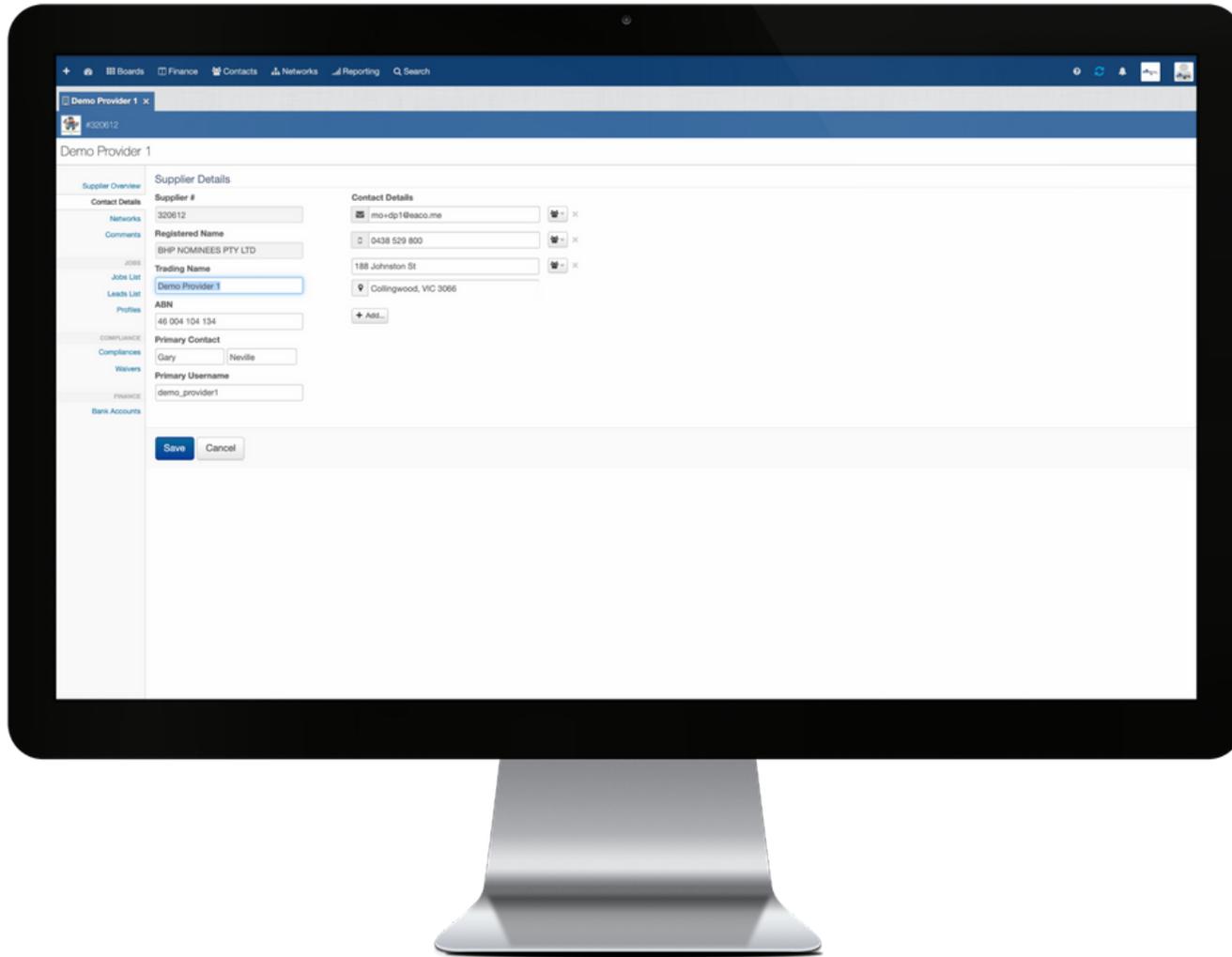
Work Profile Categories
Start typing a Category name...

Welcome Message
 Send Supplier a message welcoming them to the network.
If you select not to send this new Supplier a welcome message, their username/password to login to Eaco will not be sent to them.

Supplier Reference #
Optional

Add to Network Cancel

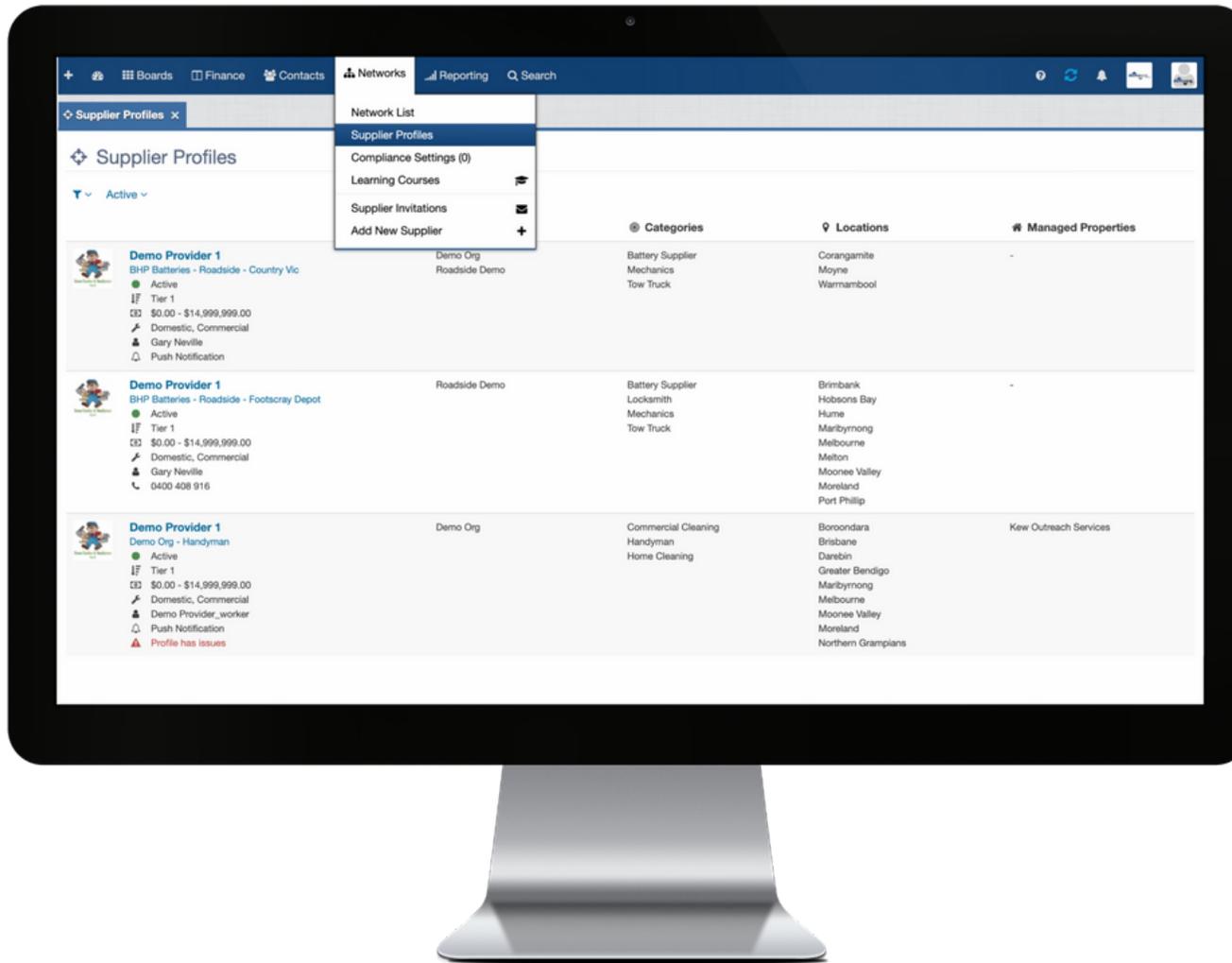
1. To set up the details for the new supplier, complete each field of the Add New Supplier form.
2. Click the Add to Network button to save.
3. Upon clicking Add to Network, a record of the Supplier's Profile will be created (see following page).



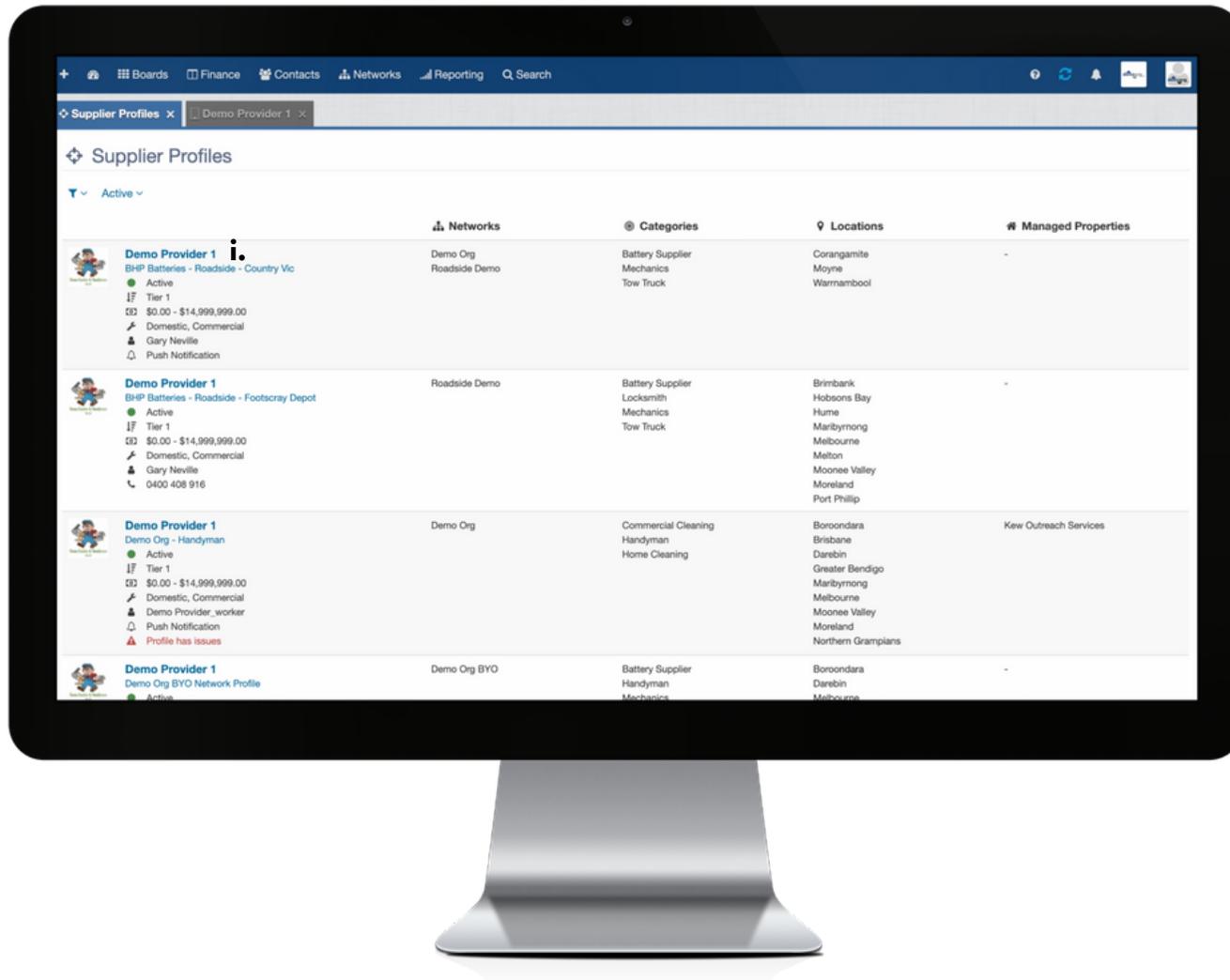
Record of a Supplier's Profile.

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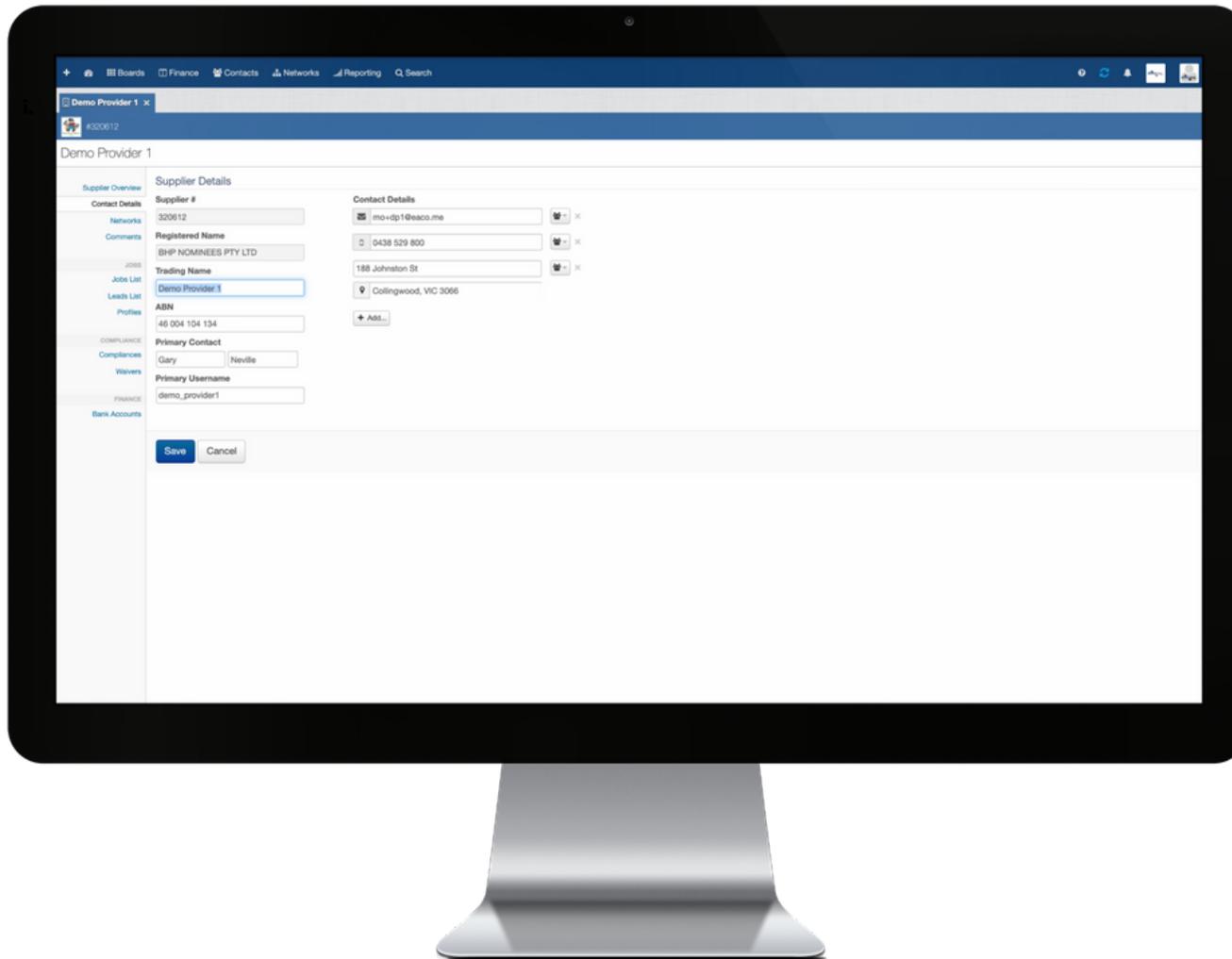
5. RETRIEVING A RECORD OF A SUPPLIER PROFILE



A record of a Supplier's Profile can also be retrieved via the Networks menu in the Control Centre - select Supplier Profiles from within the drop down menu.



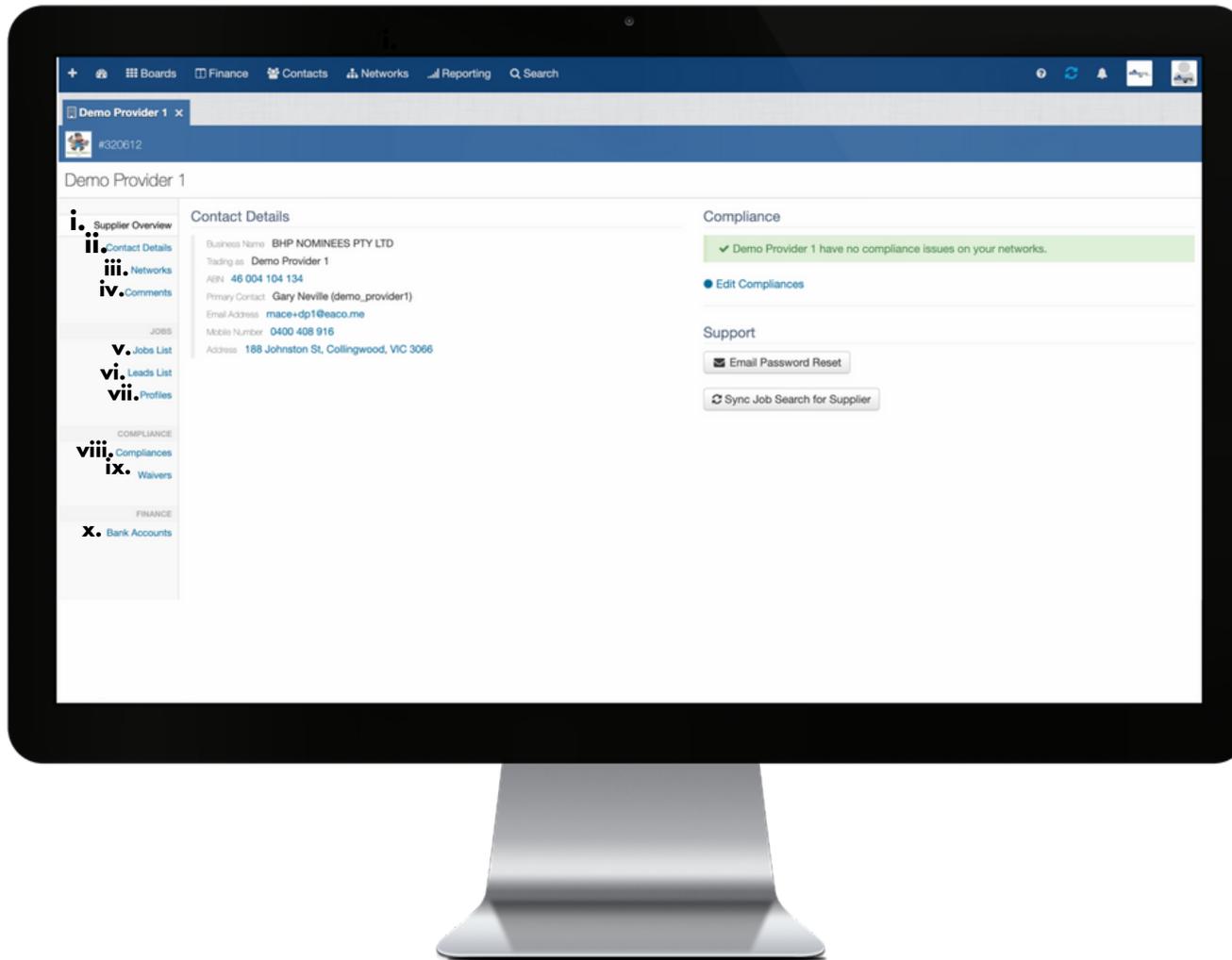
i. To retrieve a Supplier Profile, clicking on the Supplier name will open it.



Screenshot of a Supplier Profile record.

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6. SUPPLIER PROFILE RECORD IN DETAIL



Note: see following page for Legend for i. to x.

Supplier Profile Record - Legend

i. Supplier Overview - this provides a high level overview of a Supplier's Profile and includes information such as Contact Details, Compliance Status and Support functionality.

ii. Contact Details - within this section sit the supplier and contact details, all of which are editable and can be updated at any point in time.

iii. Networks - the Networks component of a Supplier's Profile enables you to view a list of your Networks and shows the Supplier's Status for each Network (e.g. Active, Terminated, Awaiting Approval, etc). Click on the Status to change it manually.

iv. Comments - use this section as deemed necessary to add comments relevant to a Supplier.

v. Jobs List - provides a list of all leads the Supplier has been associated with.

vi. Leads List - provides a list of all jobs the Supplier has been presented with over time.

vii. Profiles - lists the different Job Matching Profiles a Supplier possesses in relation to the Organisations the Supplier is registered with. Each Job Matching Profile is determined by the work the Supplier is registered to perform based on experience (job categories), location, job price range and preferred supplier status (Tier).

viii. Compliances - provides a register of compliance documents and the status of a Supplier's compliance, which may be used to determine authority to work on a job.

ix. Waivers - use this section as deemed necessary to add a Waiver to bypass the need for a Supplier to meet a specific compliance in order to get a job done.

x. Bank Accounts - lists the bank account details the Supplier has provided for payment of invoices for work done. Any changes to bank account details can be made within this section.

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7. A RECORD OF A SUPPLIER'S JOB ACTIVITY

Job ID	Description	Status	Posted	Category & Location
#1088912	Towing in Brunswick West - Thu 24/10/19	PROVIDER CLEAR OF SCENE	24 October 2019 Roadside Demo	Standard Tow Brunswick West, VIC 3055
#1088897	Towing in Brunswick West - Thu 24/10/2019	PROVIDER CLEAR OF SCENE	24 October 2019 Roadside Demo	Standard Tow Brunswick West, VIC 3055
#1085292	Change skin on Billboard 4390168	SITE ENDED	17 October 2019 Demo Org	Programmed Maintenance Brookville, NSW 2459
#1085236	Air Conditioner Maintenance - 2 Oct 2019 (Collingwood Early Learning Cen...	CANCELLED	2 October 2019 Demo Org	Air Conditioning Maintenance Collingwood, VIC 3066
#1087294	Wash Ceils	CANCELLED	1 October 2019 Demo Org	Home Cleaner South Brisbane, QLD 4101
#1085355	Test job for MO	PROVIDER ACCEPTED	25 September 2019 Roadside Demo	Roadside Assist North Melbourne, VIC 3051
#1085345	Test job for MO	PROVIDER ACCEPTED	25 September 2019 Roadside Demo	Roadside Assist North Melbourne, VIC 3051
#1083113	House Clean - Mace Liveridge	SERVICE REQUEST	20 September 2019 Demo Org	Home Cleaner The Gap, QLD 4061
#1083089	Clean up Mace's Home - 1	WORKS COMPLETE - AWAITING PAPERWORK	19 September 2019 Demo Org	Home Cleaner The Gap, QLD 4061
#1082826	Clean up Mace's Home	WORKS COMPLETE - AWAITING PAPERWORK	19 September 2019 Demo Org	Home Cleaner The Gap, QLD 4061
#1082485	Mow Mace's Lawn	WORKS COMPLETE - AWAITING PAPERWORK	18 September 2019 Demo Org	Lawn Mowing The Gap, QLD 4061
#1081930	Handyman job test for M.L.	SERVICE REQUEST	17 September 2019 Demo Org	Basic Painting The Gap, QLD 4061
#1080358	Repair Plaster in toilet	CONTRACTOR APPOINTED	13 September 2019 Demo Org	Basic Plastering Collingwood, VIC 3066
#1076396	Air Conditioner Maintenance - 4 Sep 2019 (Collingwood Early Learning Cen...	SERVICE REQUEST	4 September 2019 Demo Org	Air Conditioning Maintenance Collingwood, VIC 3066
#1077298	Kew Outreach Services Monthly Maintenance - 20 Aug 2019 (Kew Outreach Se...	INVOICE SUBMITTED	19 August 2019 Demo Org	Old Jobs Collingwood, VIC 3066
#1076671	Clear all windows in toilet room on ground floor	SITE ENDED - WORKS COMPLETE	8 August 2019 Demo Org	Home Cleaner Balaclava, VIC 3186

i: A Supplier's Profile consists of a section dedicated to all job activity related to the Supplier, including a list of a Supplier's job history.

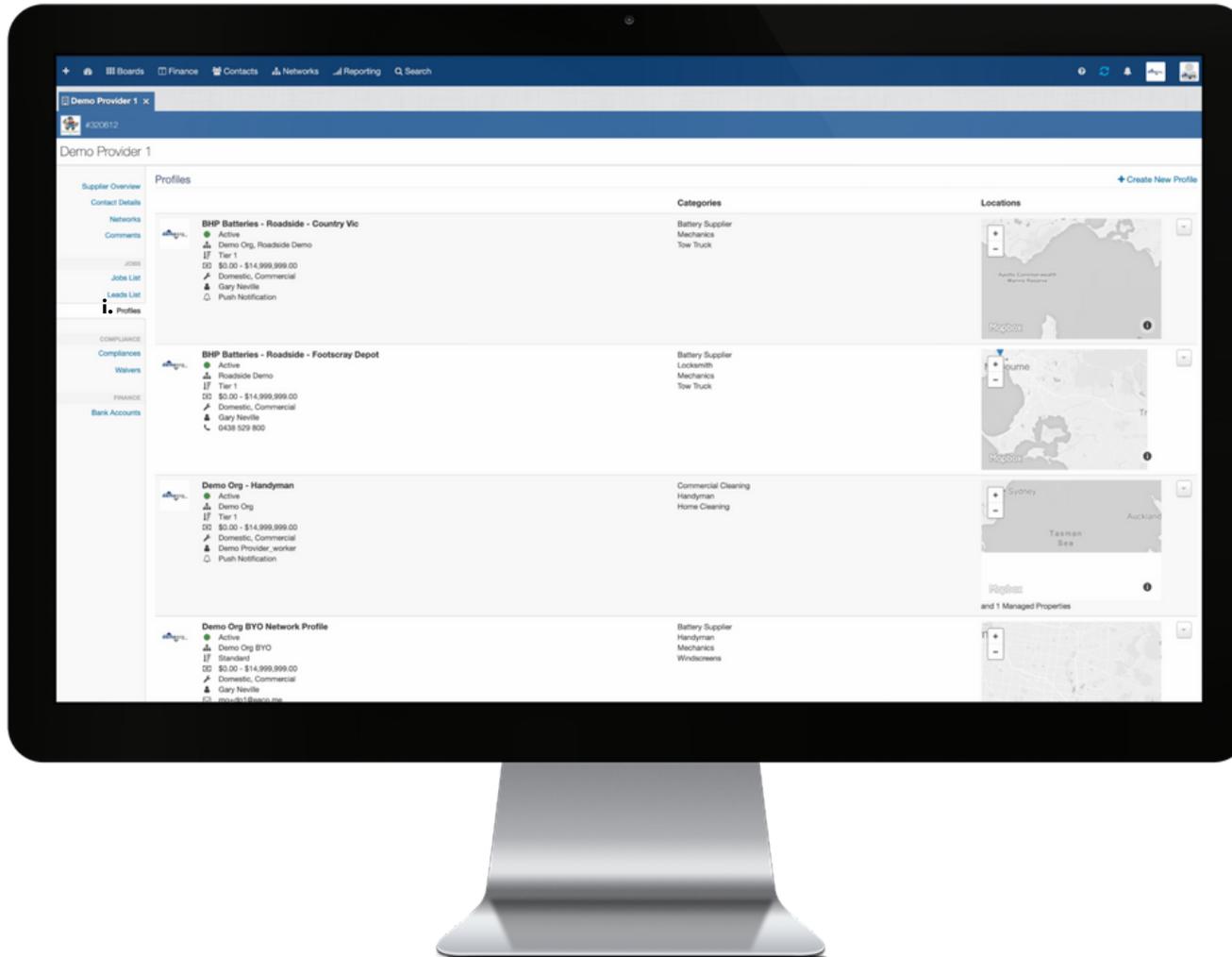
The image shows a computer monitor displaying a software interface for a supplier's profile. The interface is titled "Demo Provider 1" and features a sidebar with navigation options: Supplier Overview, Contact Details, Networks, Comments, JOBS, Jobs List, Leads List (selected), Profiles, COMPLIANCE, Compliances, Waivers, FINANCE, and Bank Accounts. The main content area displays a table of leads.

ID	Posted	Category & Location	Status
#109834 Test job for MQ	25 October 2019 Roadside Demo Network	Roadside Assist Brunswick West, VIC 3055	NOTIFIED
#109813 Towing in Brunswick West - Thu 24/10/19	24 October 2019 Roadside Demo Network	Standard Tow Brunswick West, VIC 3055	ACCEPTED
#109887 Towing in Brunswick West - Thu 24/10/2019	24 October 2019 Roadside Demo Network	Standard Tow Brunswick West, VIC 3055	ACCEPTED
#109292 Change skin on Billboard 4390168	17 October 2019 Demo Org Network	Programmed Maintenance Boggettville, NSW 2409	ACCEPTED
#109325 Kew Outreach Services Monthly Maintenance - 15 Oct 2019 (Kew Outreach Se...	14 October 2019 Demo Org Network	Odd Jobs Collingwood, VIC 3066	REFUSED
#108918 Wheel Change	2 October 2019 Demo Org Network	Roadside Assist Arenst, VIC 3377	NOTIFIED MANUAL
#108836 Air Conditioner Maintenance - 2 Oct 2019 (Collingwood Early Learning Cen...	2 October 2019 Demo Org Network	Air Conditioning Maintenance Collingwood, VIC 3066	ACCEPTED
#1087584 Wash Corolla	1 October 2019 Demo Org Network	Home Cleaner South Brisbane, QLD 4101	ACCEPTED
#1083355 Test job for MQ	25 September 2019 Roadside Demo Network	Roadside Assist North Melbourne, VIC 3051	ACCEPTED
#1083345 Test job for MQ	25 September 2019 Roadside Demo Network	Roadside Assist North Melbourne, VIC 3051	ACCEPTED
#1083313 House Clean - Mace Liveridge	20 September 2019 Demo Org Network	Home Cleaner The Gap, QLD 4081	ACCEPTED
#1083089 Clean up Mace's Home - 1	19 September 2019 Demo Org Network	Home Cleaner The Gap, QLD 4081	ACCEPTED
#1082826 Clean up Mace's Home	19 September 2019 Demo Org Network	Home Cleaner The Gap, QLD 4081	ACCEPTED
#1082485 Mow Mace's Lawn	18 September 2019 Demo Org Network	Lawn Mowing The Gap, QLD 4081	ACCEPTED
#1081930 Handyman job test for MJL	17 September 2019 Demo Org Network	Basic Painting The Gap, QLD 4081	ACCEPTED
#1081180 Kew Outreach Services Monthly Maintenance - 15 Oct 2019 (Kew Outreach Se...	16 September 2019 Demo Org Network	Odd Jobs Collingwood, VIC 3066	NOTIFIED

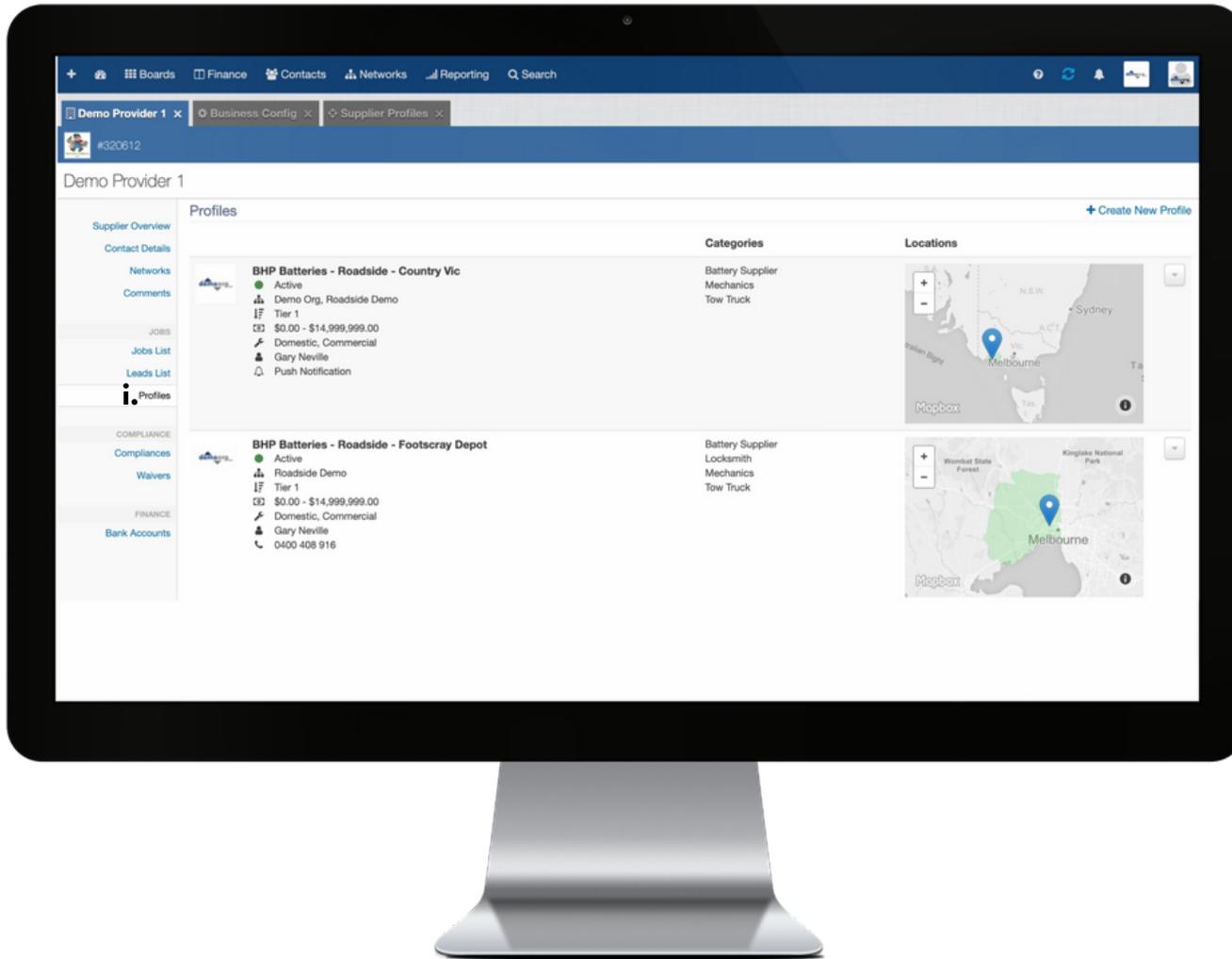
i: A Supplier's Profile consists of a section dedicated to all job activity related to the Supplier, including a list of a Supplier's history of all leads issued using Eaco.

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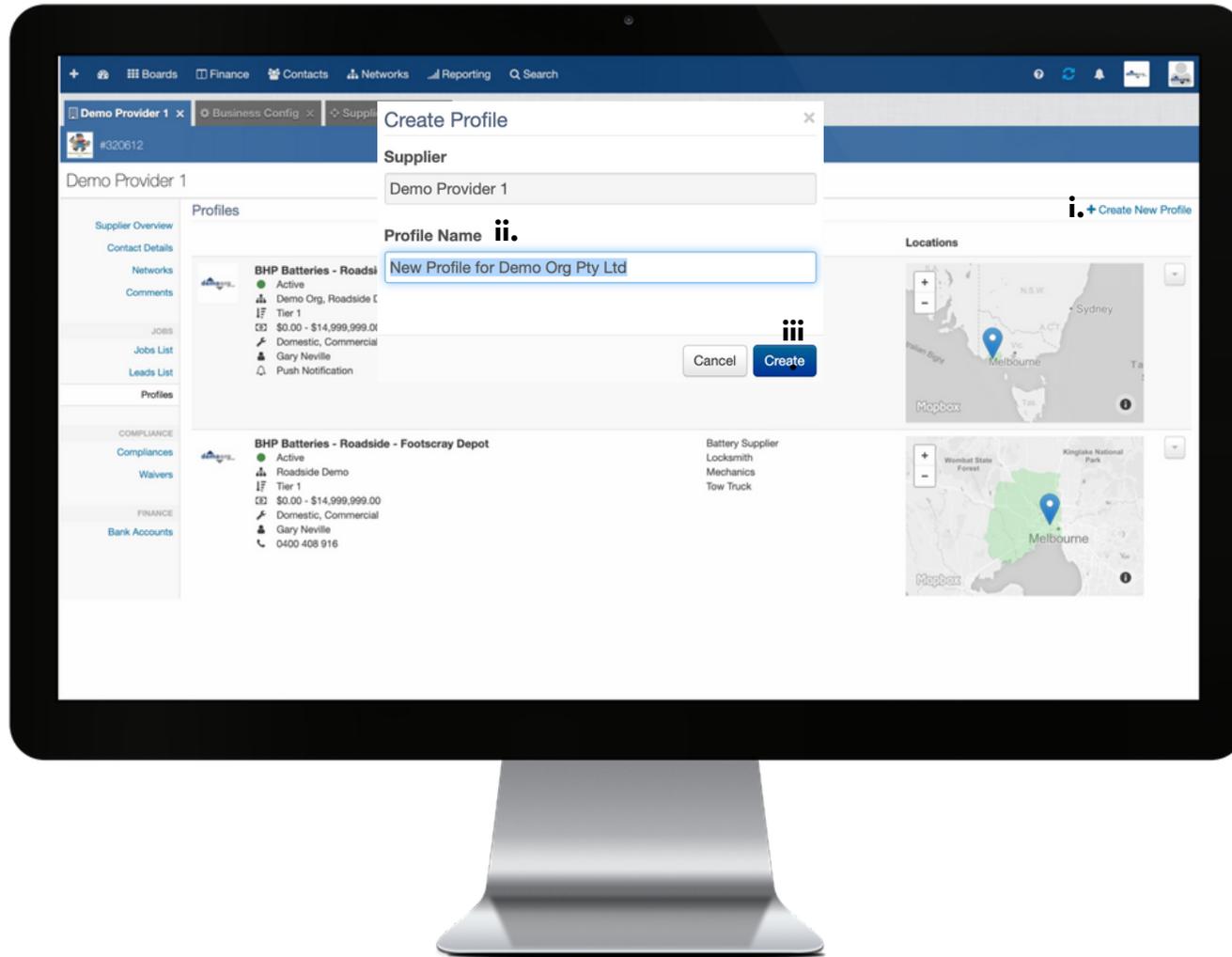
8. SUPPLIER JOB MATCHING PROFILES



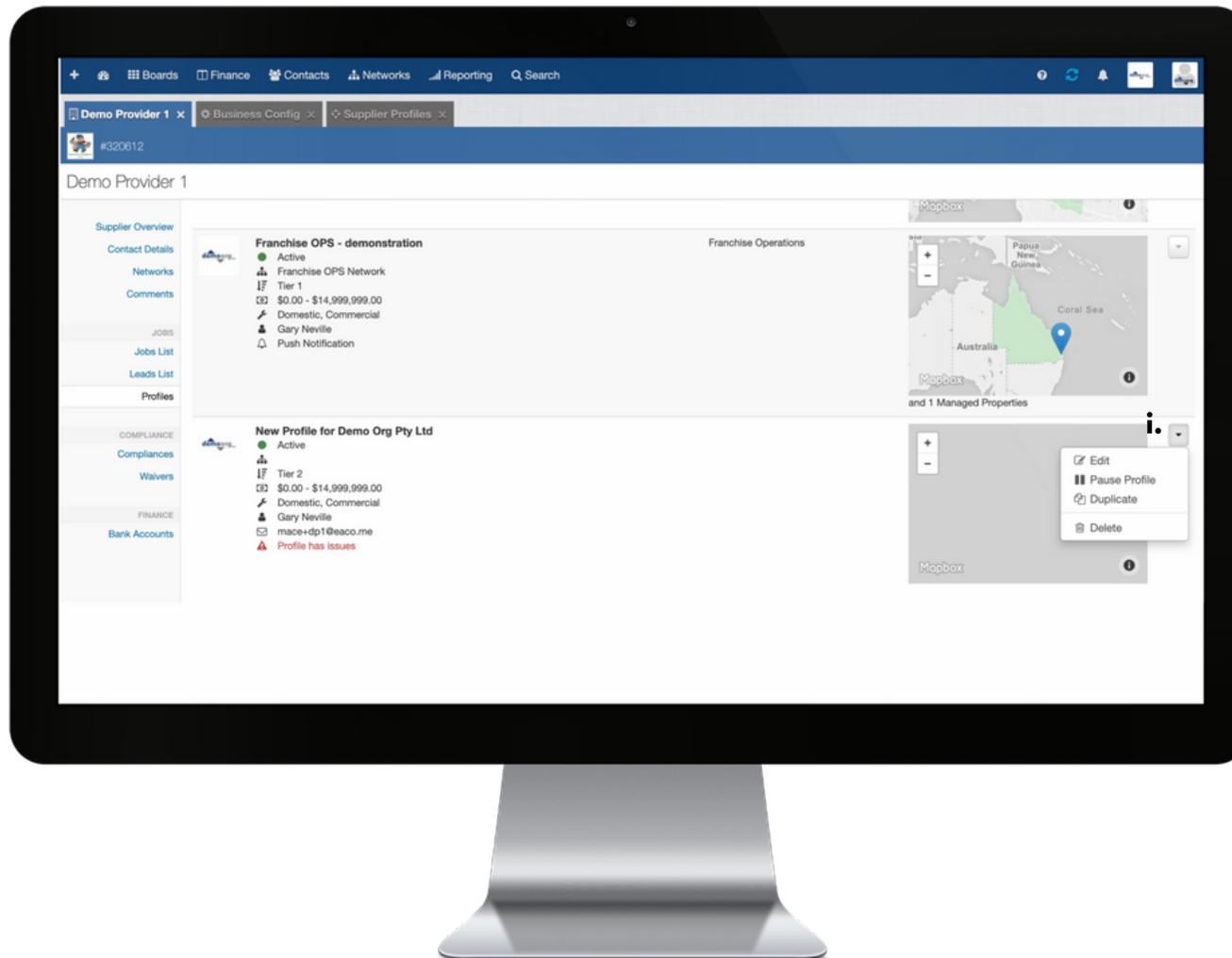
i: Within the section of a Supplier's Profile dedicated to a Supplier's job related activity, the Profiles list represents the types of jobs for which the Supplier is considered a suitable match based on factors such as skills, price range, priority level and location.



i. To view the Job Matching Profiles that have been established for a Supplier, click on **Profile** from within the left hand menu of the Supplier Profile's record.



- i. To create a new Job Matching Profile for the Supplier, click the + icon to open the Create New Profile dialog box.
- ii. Complete this field in order to name the Job Matching Profile.
- iii. Click Create to confirm creation of the new Job Matching Profile.



i. To edit or complete the establishment of the new Job Matching Profile , click the drop down menu to the right of the Job Matching Profile and select Edit from the menu to open the Profile record.

ADDRESS: Client Profiles > New Profile for Demo Org Pty Ltd

#59383 New Profile for Demo Org Pty Ltd

Profile Settings

Profile Name: New Profile for Demo Org Pty Ltd

Profile Status: Active

Address: [Field]

Profile Layer: Tier 2

Auto Accept: No

Emergency Job: Office Hours Only

Price Range: \$0.00 - \$14,888,888.00

Contact Types: Commercial

Networks: Demo Org, Demo Org BYO, Franchise OPS Network, Riverside Demo

State of Operations: [Field]

Building Info (optional): [Field]

Street Address: [Field]

Suburb: [Field]

Primary Profile Contact: User to Notify: Gary Smith

Email: gsmith@demo.me

Mobile: 2400 433 878

Notification Method: Email

Open Notification Links to: demo.me

On-Job acceptance, assign the notified user to the job? Yes

Save

Profile has no Locations or Managed Properties so will not be matched to any opportunities
Profile has no Categories so will not be matched to any opportunities
Profile has no Networks so will not be matched to any opportunities

i. To edit or complete the establishment of the new Job Matching Profile, work your way through each section listed in the the menu to the left starting with Profile Settings section.

Job Matching Profile Settings - instructions for establishing/editing settings

Profile Name - complete this field to identify the Job Matching Profile by Name.

Profile Status - use this setting to mark the Job Matching Profile as Active or Paused. Paused Profiles will not be automatically matched to any jobs.

Profile Layer - this setting enables you to select a preference Tier to determine the order in which the Supplier should be notified about a job matching their profile. Tier 1 beats Tier 2, Tier 2 beats Tier 3 and so forth.

Example: A new job is posted to a Network. All Suppliers classed as Tier 1 and Tier 2 that match the job requirements are queued to receive a notification about that job. The system sends out the notification of the job lead to the Tier 1 Supplier first who are given an hour to accept or decline the lead. After the hour-long window is up, if the job still requires responses, the system sends a notification to the Tier 2 Suppliers who are given three hours to accept or decline the lead. After this time, if the job still requires responses, the system may release the lead to a jobs board where Suppliers classed as Tier 3 or higher can be given the opportunity to accept the lead.

Note: Eaco Systems can configure custom Profile Layers and custom notification algorithms for its Enterprise clients.

Auto Accept - by default, Suppliers are notified about jobs matching their profile and they can decide whether to accept or decline each job. If Auto Accept is set to Yes, the provider will not be given the choice of accepting/declining as the system will automatically accept any job on their behalf.

This setting should be used with caution and the recommendation is to keep the setting set to No.

Emergency Job - emergency jobs require immediate attention by a Supplier, so this setting enables Suppliers to specify whether they only wish to receive emergency jobs during office hours (select the Office Hours Only option to attach to this setting), anytime (select Yes), or not at all (select No).

Price Range - jobs that are classed as a "Request for Quotes" have an estimated job cost. Do and Charge jobs have a maximum repair price. Only jobs with an estimated/authorised price within the Supplier's profiled price range will be matched.

Contract Types - this setting provides the option for Suppliers to elect whether they wish to be matched to perform domestic work, commercial work or both.

Networks - a job is posted to a Supplier Network and is then matched to Suppliers that are members of that Network. Use this Job Matching Profile Setting to link a Supplier to as many Networks as necessary.

Base of Operations - this is an optional setting, which enables you to attach an address that serves as a Supplier's base location.

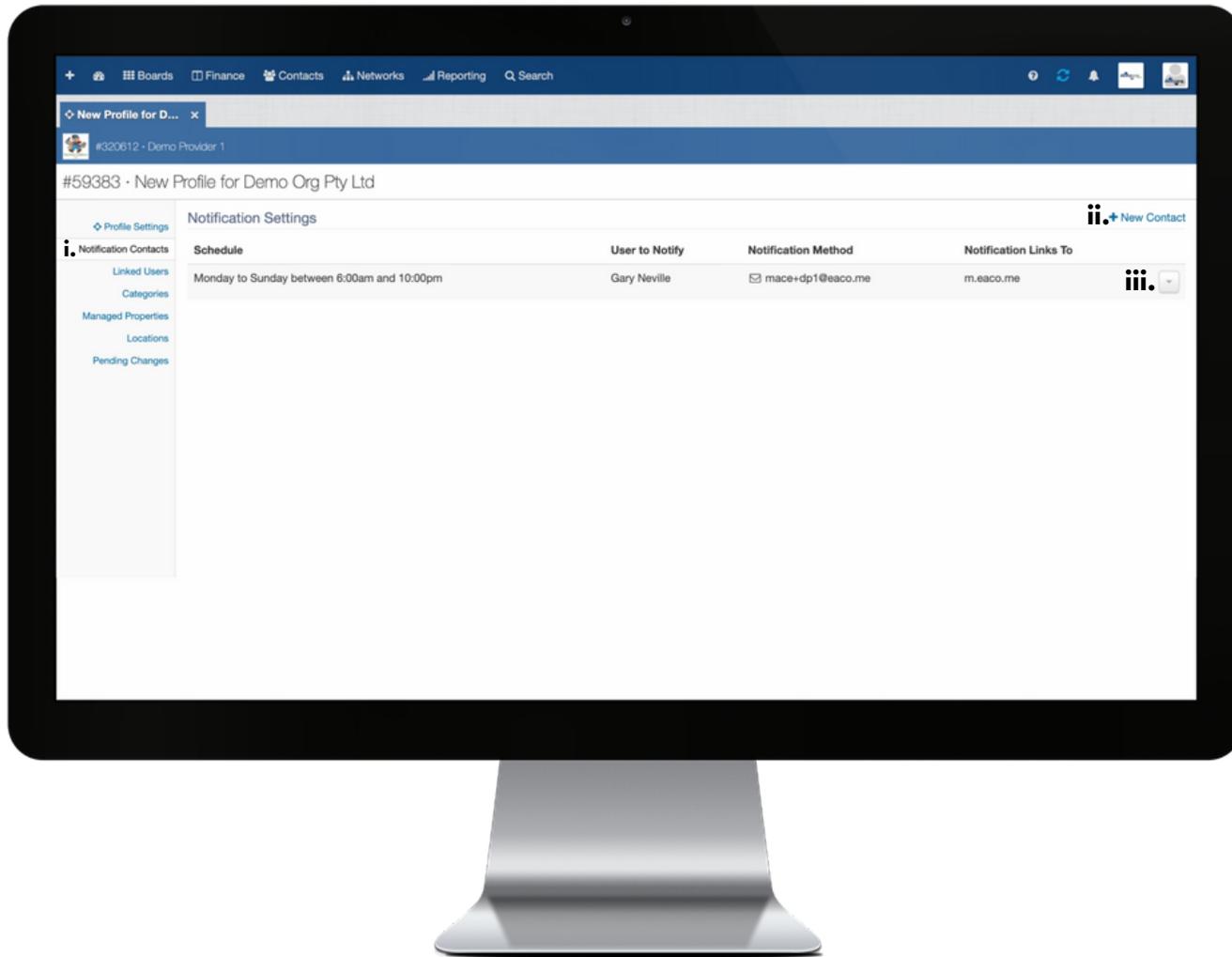
User to Notify - complete this setting based on the member of a Supplier's organisation who will be sent notifications about jobs matching their profile. A Supplier's organisation in Eaco can be made up of multiple user accounts. Upon selecting the User to Notify, their Email and Mobile (as specified by them on their user account) will be displayed.

Notification Method - this setting enables you to establish the basis on how the user should be notified.

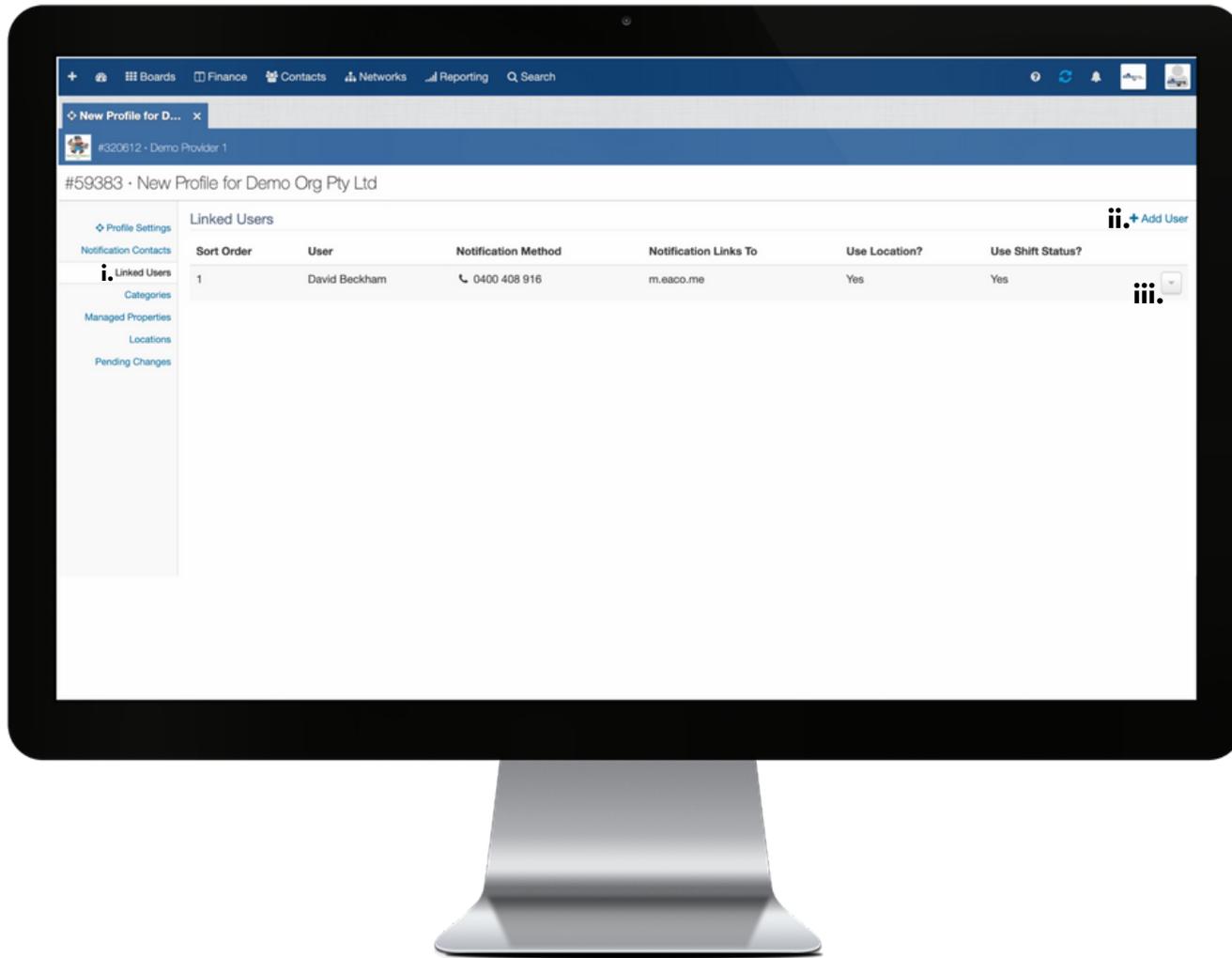
If Email is the preferred method, the user will be emailed all the job details and a link to accept/decline the job.

SMS with URL - the user will be sent an SMS message with minimal information about the job and a link to view all the job details and accept/decline the job.

SMS only - the user will be sent an SMS message with minimal information about the job and they must reply YES to accept the job (this method is not recommended).



- i. To edit or complete the establishment of the Notification Settings for the Supplier/relevant contacts, click on the Notification Contacts section listed in the the menu to the left.
- ii. To establish Notification Settings for a new Profile Contact, click + New Contact to open the Create Profile Contact form and proceed to completing the form fields.
- iii. To edit the Notification Settings for an existing Profile Contact, click here to open the drop down menu, select Edit and proceed to editing the form fields as deemed necessary.

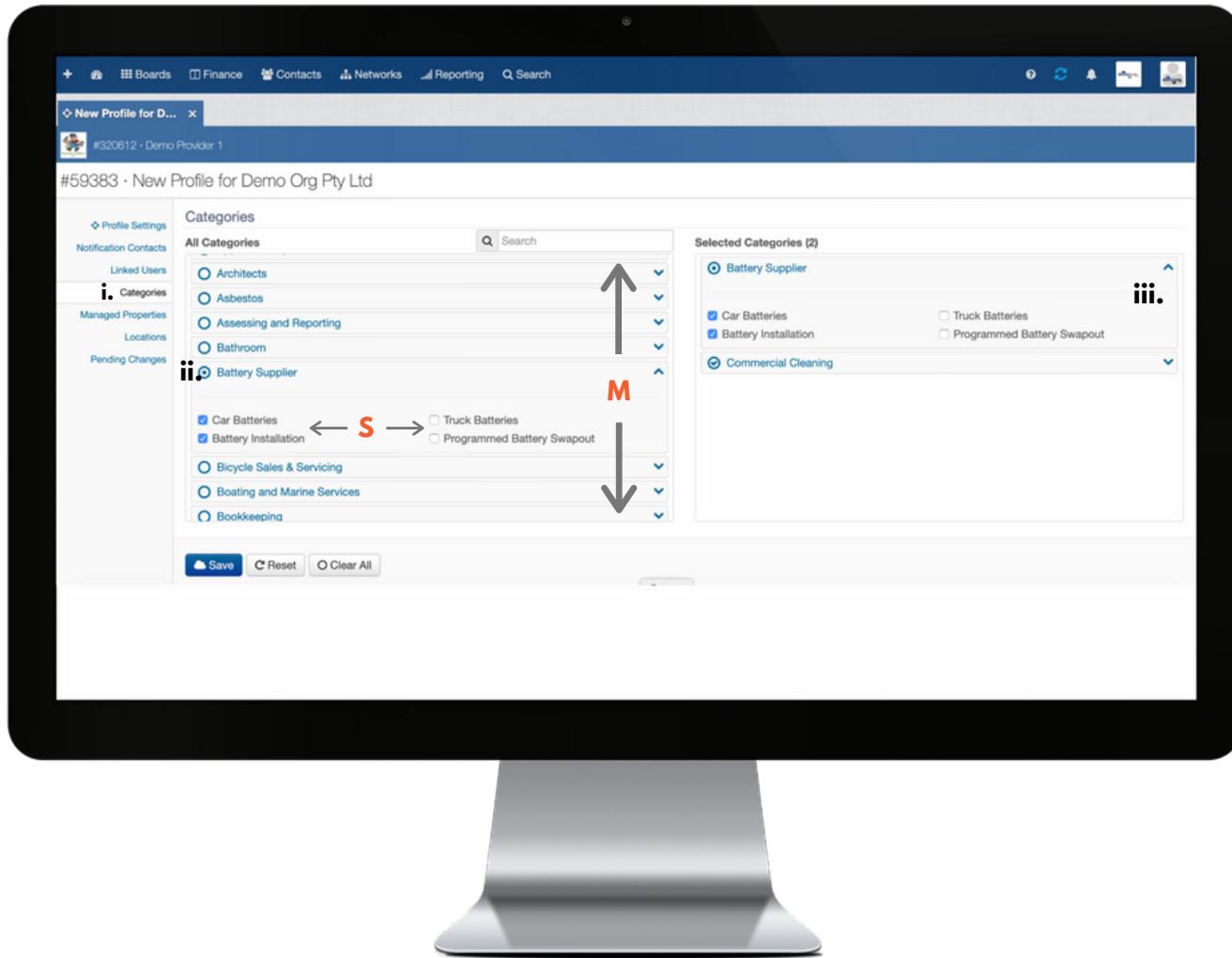


i. To edit or complete the establishment of Linked Users (i.e. the field workers) for the Supplier, click on the Linked Users section listed in the the menu to the left.

Note: nominating a Linked User is useful if the Supplier wishes to dynamically send a lead notification to a field worker (e.g send the lead to the nearest on-shift Linked User).

ii. To add a Linked User to a Supplier's Job Matching Profile, click + Add User to open the Link User to Profile form and proceed to completing the form fields.

iii. To edit the details of an existing Linked User, click here to open the drop down menu, select Edit and proceed to editing the form fields as deemed necessary.

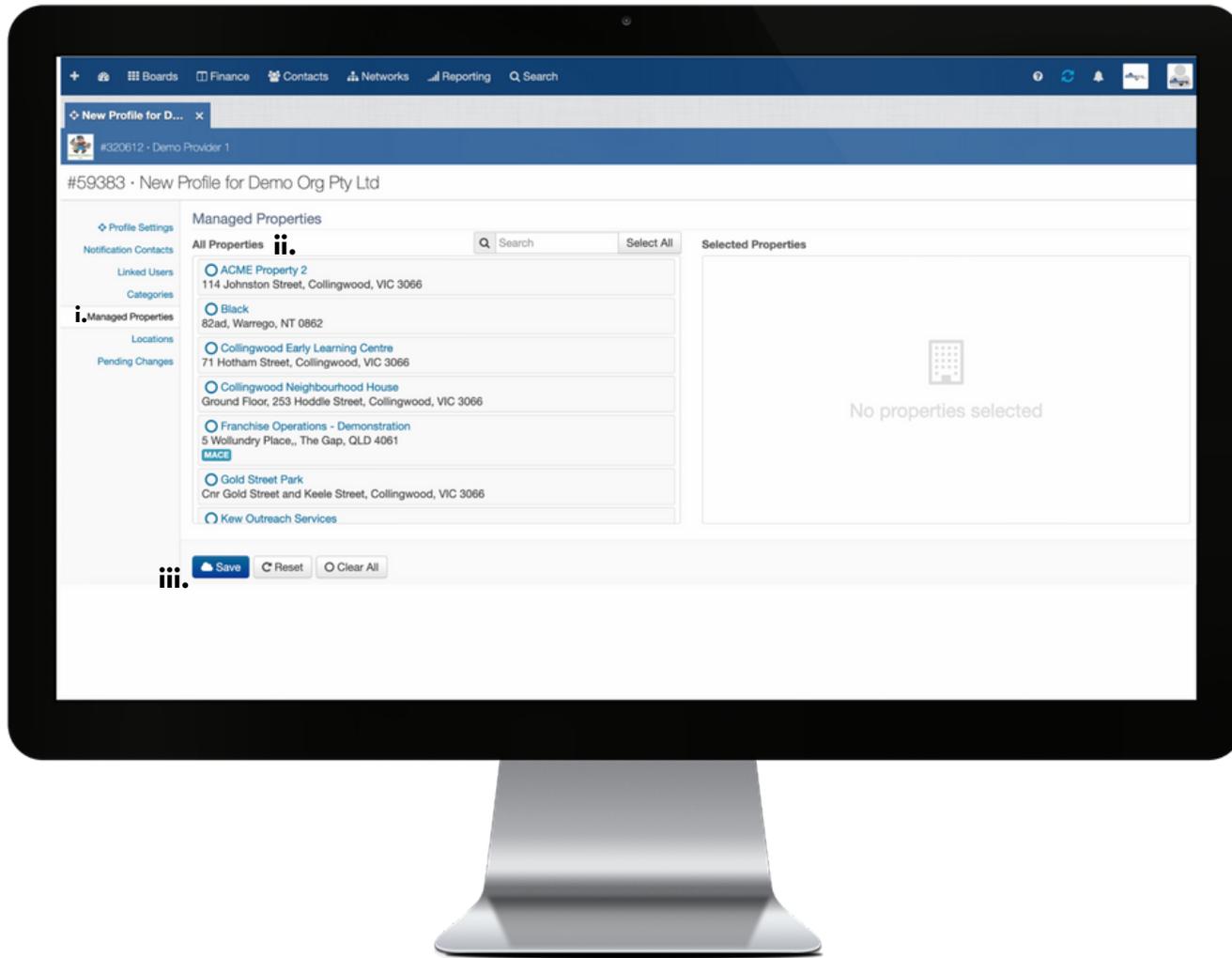


i. To attach job categories to a Supplier's Job Matching Profile, click on the Categories section listed in the the menu to the left.

Note: a category represents the basis of the type of job for which a Supplier will be matched.

ii. To add or remove a category for completion of a Supplier's Job Matching Profile, simply tick or untick the Master (M) or Sub Categories (S).

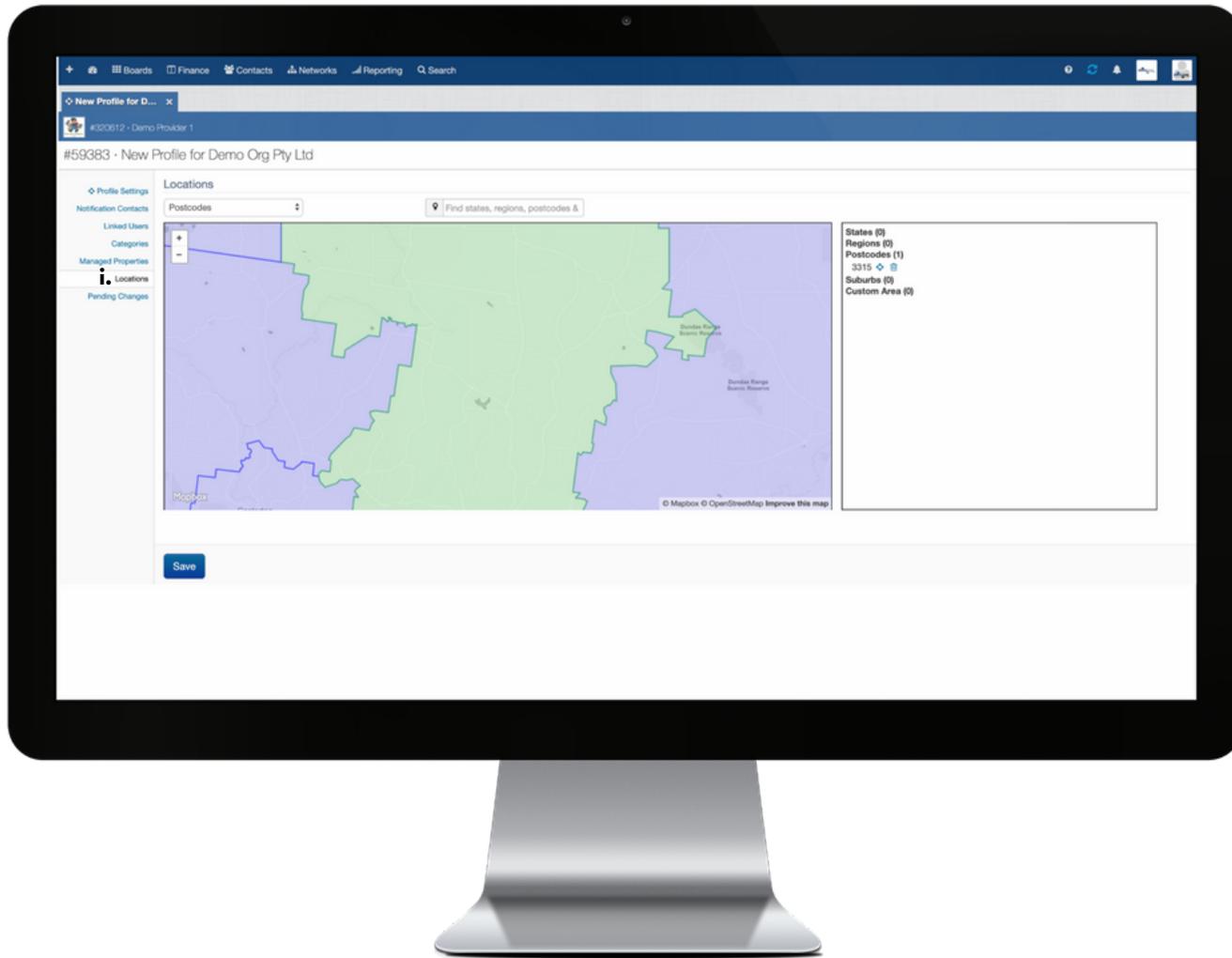
iii. To edit the details of an existing Linked User, click here to open the drop down menu, select Edit and proceed to editing the form fields as deemed necessary.



i. To attach a Managed Property to a Supplier's Job Matching Profile, click on the Managed Properties section listed in the the menu to the left.

Note: a Supplier must be linked to a Managed Property and/or a Location in order to be job-matched.

ii. To select or deselect a Managed Property for completion of a Supplier's Job Matching Profile, simply tick or untick the relevant Managed Property and click Save (iii.).

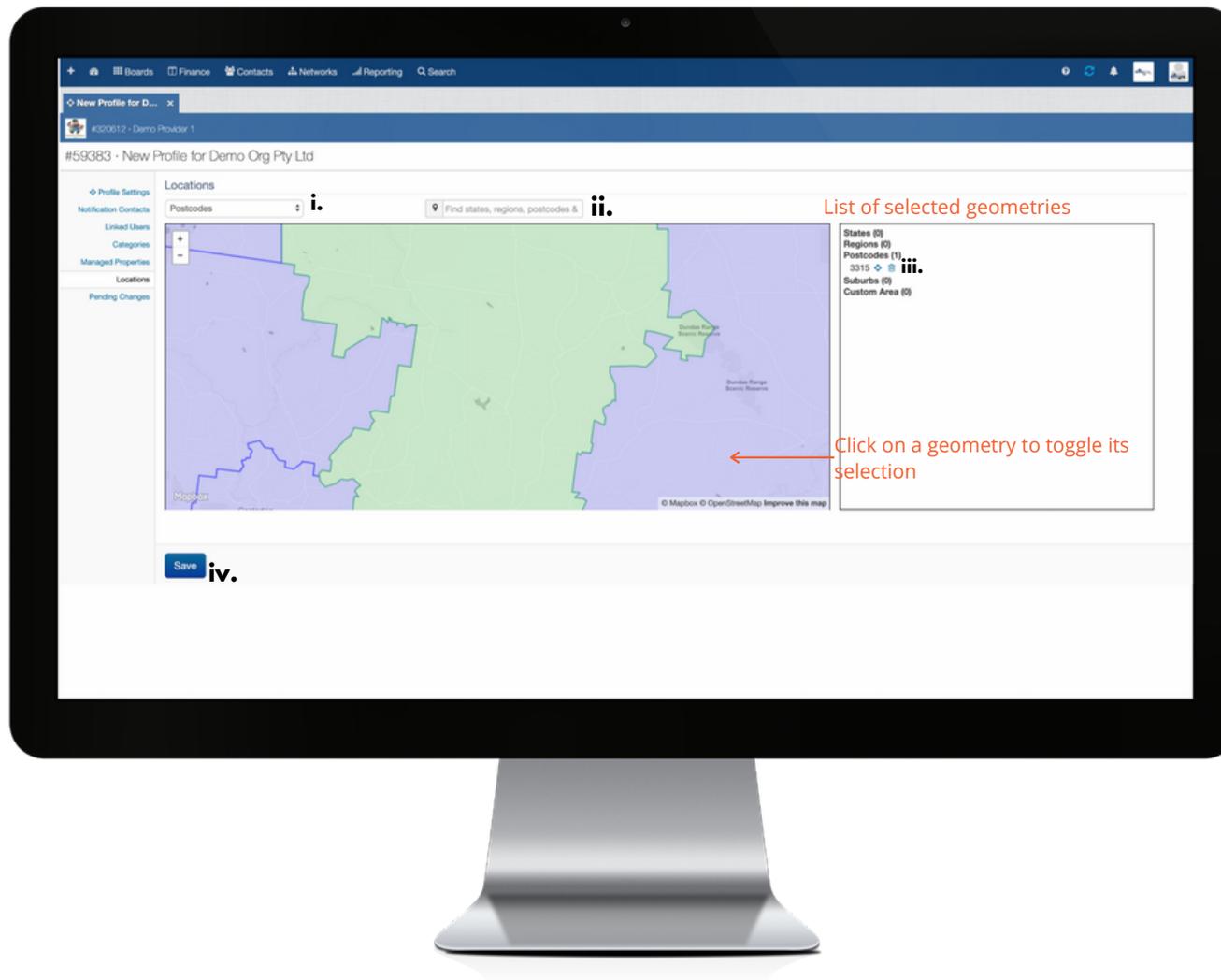


i. Each job posted to Eaco has a location (street address). The location component of a profile is made up of a selection of Geometries. A Geometry is a polygon that defines a geospatial area. If a job's street address falls inside a geometry, the Supplier Job Matching Profiles that are linked to that geometry will be matched to the job.

Eaco has a set of predefined geometries that can be selected to build up a Supplier's Job Matching Profile. These include all of Australia's state and territories and many Australian council regions, postcodes and suburbs. Suppliers can also draw their own custom polygons, or specify a distance they are willing to travel for work.

If a map does not load properly, double click on the Locations link on the left hand side of the profile editing section which will refresh the current page. **Do not do a refresh of your browser.**

Continue on to the next two pages for remaining instructions on establishing Location settings for a Supplier's Job Matching Profile.



i. From the drop-down menu, select which geometry types to show (States, Regions, Post Codes, Suburbs or Custom drawn areas).

ii. Search by a geometry by name to zoom to it on the map.

iii. Clicking on the diamond shaped icon will zoom in on the selected geometry whereas clicking on the rubbish bin icon will deselect the geometry.

iv. Click Save to apply the settings.

Draw custom polygons, rectangles or circles to customise the profiled areas.

Locations

