



**CORRIGOPRO**

# Managing Branches in CorrigoPro

Creating, Adding Users, Connecting

# During this tutorial we will cover...

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- Creating a New Branch: Slide 3
- Adding Cru to a Branch: Slide 9
- Deleting Cru From a Branch: Slide 16
- Connecting Customers to a Branch: Slide 17
- Viewing Your Branches and Customers: Slide 20

# Branches

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Branches in Corrigo allow you to separate your work orders based on one of three options –

Your Locations – Each location will have its own branch

Your Customers – Each customer's work orders would be separate

Your Services – Your work would be separated by services provided

Only the people that need access to each branch will have it, and you control who has access to your branches

There is no limit – add as many as you need

If adding multiple branches to a single customer, please consult with that customer before beginning as there is a little additional work on their side – they will need to agree to work with you on this

# Creating Your Branches

Log into your CorrigoPro Desktop using the email address and password you set up during registration

Click on your Profile to set up your branches

The screenshot shows the Corrigopro Desktop interface. At the top left, the logo reads "CORRIGOPRO" in orange and "DESKTOP" in white. The top right corner shows the user name "Thomas" and a US flag. Below the header are icons for home, user profile, and settings. The main content area features a large dark grey card for "CORRIGOPRO DIRECT: Integration for your existing work order software!". This card lists four benefits: "Automate routine data entry", "Eliminate double-entry of data into multiple systems", "Respond faster to customers", and "Check in/out of a single system". A "LEARN MORE >" button is at the bottom of this card. To the right is a white sidebar with the Corrigopro logo and the text "Connect to Your Customers. Stay Connected Anywhere." Below this is a photo of a worker. The dashboard also includes several notification tiles: a white tile for "Fowler's Testing" with a circular logo and the message "CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE" (highlighted with a green border); a blue tile with "NO NEW OPPORTUNITIES"; a blue tile with "YOUR INVOICES NEED ATTENTION"; and a white tile with a starburst icon, the number "0", and the text "YOUR AVERAGE SCORE".

# Profile – Add New Branch

## Company Profile



Fowler's Testing

[CHANGE COMPANY LOGO](#)

[CHANGE COMPANY NAME](#)

In your profile, you will find your original branch, which was set up when you registered your account - you will also see any branches that have been set up subsequently

## Business Overview [EDIT](#)

We provide Testing.

TAXPAYER IDENTIFICATION  
NUMBER (TIN) \*\*\*\*309 [EDIT](#)  
[WHAT IS A TIN NUMBER](#)

You can edit the existing information for any of your branches here if you wish, or, by clicking “Add New Branch”, you can create a new one

## Branches

[ADD NEW BRANCH](#)

NAME Fowler's Testing [EDIT BRANCH INFO](#)

PROMO [CREATE YOUR FREE AD](#)

PHONE (404) 867-5309

EMAIL [connect@corrigo.com](mailto:connect@corrigo.com)

FAX (404) 867-5308

WEB SITE [www.fowlerstesting.com](http://www.fowlerstesting.com)

Please note – if you do not have the “Add New Branch” link, please contact Corrigo to add branches – [connect@corrigo.com](mailto:connect@corrigo.com)

# Populating Your Branch

### New Branch Info ×

 The Branch Name will be automatically changed to '<ProviderName> - <BranchName>'

NAME	<input type="text" value="Boston"/>
PHONE	<input type="text" value="4048675309"/>
EMAIL	<input type="text" value="Testing1@Fowler.com"/>
FAX	<input type="text" value="4048675308"/>
WEB SITE	<input type="text" value="www.fowlertesting.com"/>
STREET	<input type="text" value="123 Main St."/>
STREET 2	<input type="text"/>
CITY	<input type="text" value="Boston"/>
COUNTRY 	<input type="text" value="USA"/>
STATE	<input type="text" value="Massachusetts"/>
ZIP	<input type="text" value="02101"/>
SERVICES	<input type="text" value="Plumbing - Backflow Prevention"/>

CorrigoPro will automatically add your company name to the front of the branch name that you provide - we've provided the name "Boston" here - once it is submitted, it will read "Fowler's Testing – Boston"

Please provide all other information that is relevant to this branch – phone, general email, fax, website, location, and the services that this branch is able to provide

Please note that this is not the email address where work order alerts will be received – this is for the general email address for this branch – work order alerts will be received by the users with access to this branch

# Smart Zones

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**NAME** Fowler's Testing - Boston [EDIT BRANCH INFO](#)

**PROMO** [CREATE YOUR FREE AD](#)

**PHONE** (404) 867-5309

**EMAIL** Testing1@Fowler.com

**FAX** (404) 867-5308

**WEB SITE** www.fowlertesting.com

**ADDRESS** 123 Main St., Boston, MA, US, 02151

**SERVICES** Plumbing - Backflow Prevention [EDIT](#)



**SMART ZONES**  
[WHAT IS SMART ZONE](#)

[EDIT](#)

Once the new branch is created, you will find it in your profile

Everything should now be populated for your new branch except your Smart Zones

To set up the Smart Zones for this branch, click “Edit” and select the areas where this branch is able to provide service

# Desktop View

The screenshot shows the CORRIGOPRO Desktop View interface. At the top left, the logo reads "CORRIGOPRO" in orange and "DESKTOP" in white. The top right corner displays the user name "Thomas" and a US flag icon. Below these are icons for home, user profile, and settings. The main content area is divided into several sections:

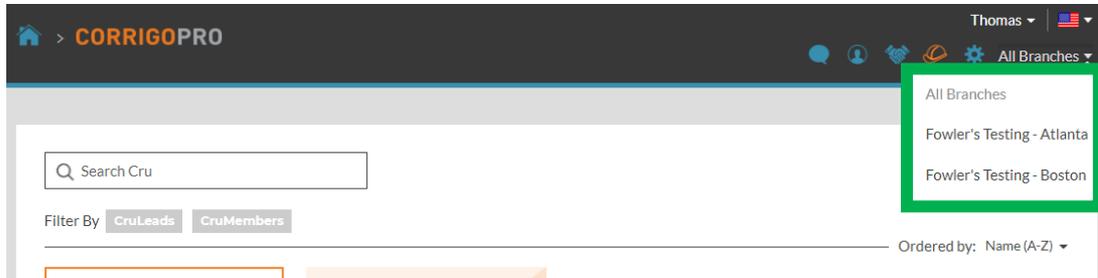
- CORRIGOPRO DIRECT:** A dark grey section with the text "Integration for your existing work order software!". It lists three benefits: "Automate routine data entry", "Eliminate double-entry of data into multiple systems", "Respond faster to customers", and "Check in/out of a single system". A "LEARN MORE >" button is at the bottom.
- Company Profile:** A white section on the left with the "Fowler's Testing" logo and the text "Fowler's Testing" and "CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE".
- Opportunities:** A blue section on the right with the text "NO NEW OPPORTUNITIES".
- Branch Selection:** A white section on the right with the CORRIGOPRO logo and a dropdown menu. The dropdown is highlighted with a green border and shows "All Branches" selected, with "Fowler's Testing - Atlanta" and "Fowler's Testing - Boston" as options.
- Stay Connected:** A white section with the text "Stay Connected Anywhere." and a photo of a worker in a hard hat.

Your new branch is now set up and ready to be connected to your customers

Notice that you can now select a single branch to view when you enter the CorrigoPro application from your Desktop

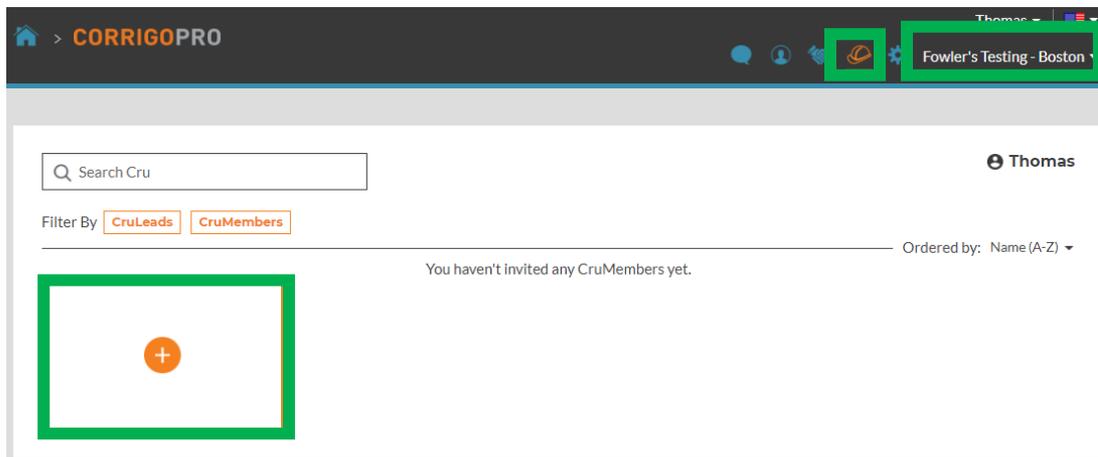
# Add Your Cru

Now that your new branch is created, you will need to add your Cru to it – At least one member of your Cru is required in each branch to be able to process work



In Corrigopro, you will now find a drop down for your branches at the top right

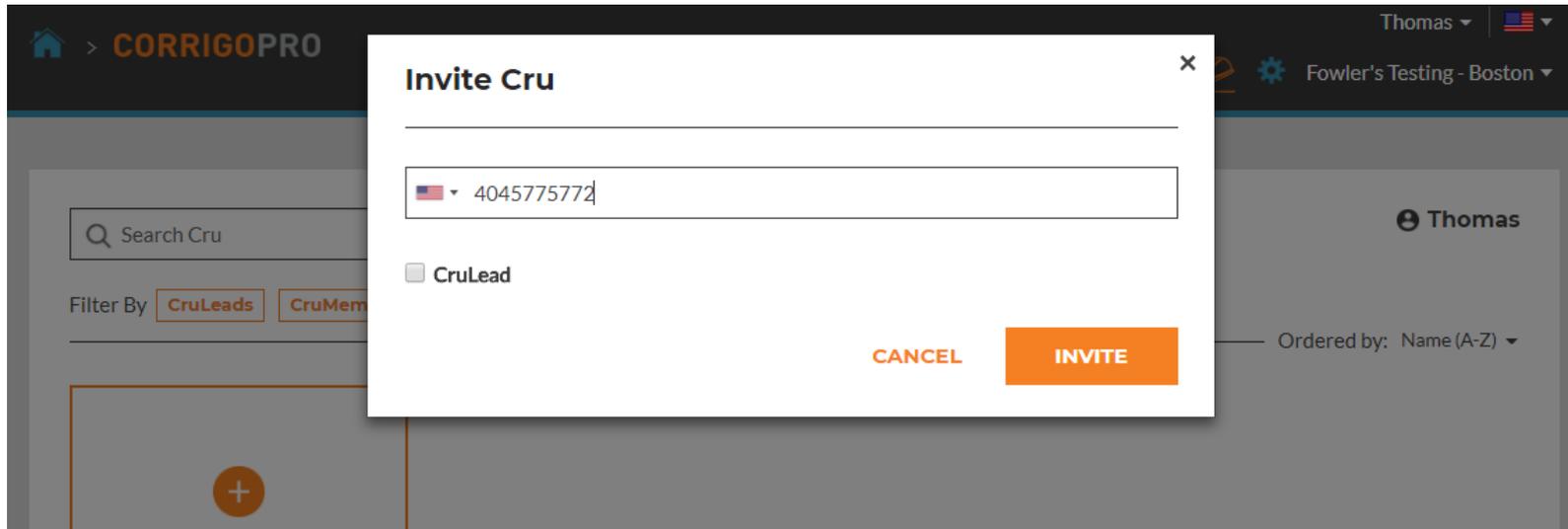
By selecting a single branch from this dropdown, you can now view work orders, customers, subs, and Cru associated with that branch



By viewing the new branch in “Our Cru”, you will see that there are not any users associated with this Cru yet

There are three ways that users can be added to a branch - click the “+” sign to see the first

# Add Your Cru – CorrigoPro Invitation

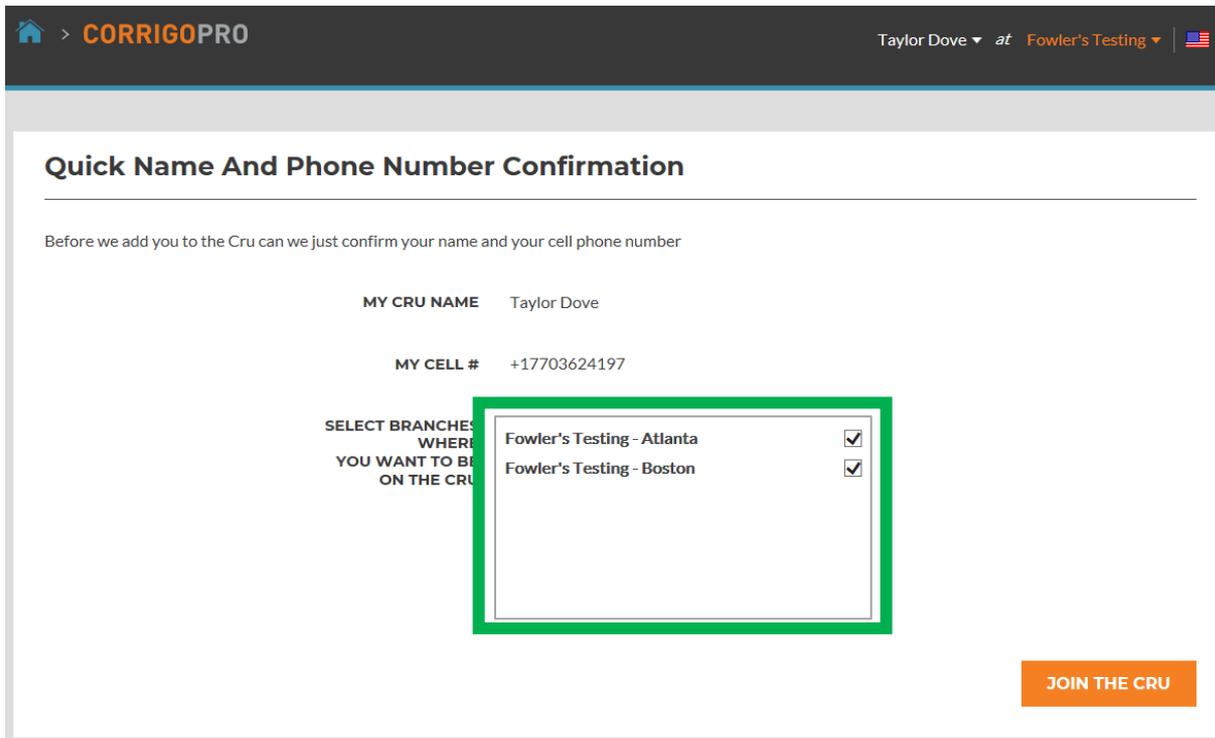
A screenshot of the CorrigoPro web application showing an 'Invite Cru' dialog box. The dialog box is white with a dark border and a close button (X) in the top right corner. It contains a text input field with a dropdown menu showing a US flag and the number '4045775772'. Below the input field is a checkbox labeled 'CruLead'. At the bottom of the dialog are two buttons: 'CANCEL' and 'INVITE'. The background shows a blurred view of the CorrigoPro interface with a search bar, filter buttons, and user information.

Enter the mobile phone number of the individual you wish to invite to join your Cru and then click “CruLead” if applicable - Mobile phone number is required when using this invitation

Once you click “Invite” the individual will receive a text message with the opportunity to register and join your Cru – please note that inviting a new user directly from the CorrigoPro application will give them mobile only access – they will not have a Desktop login

# Add Your Cru – Desktop Invitation

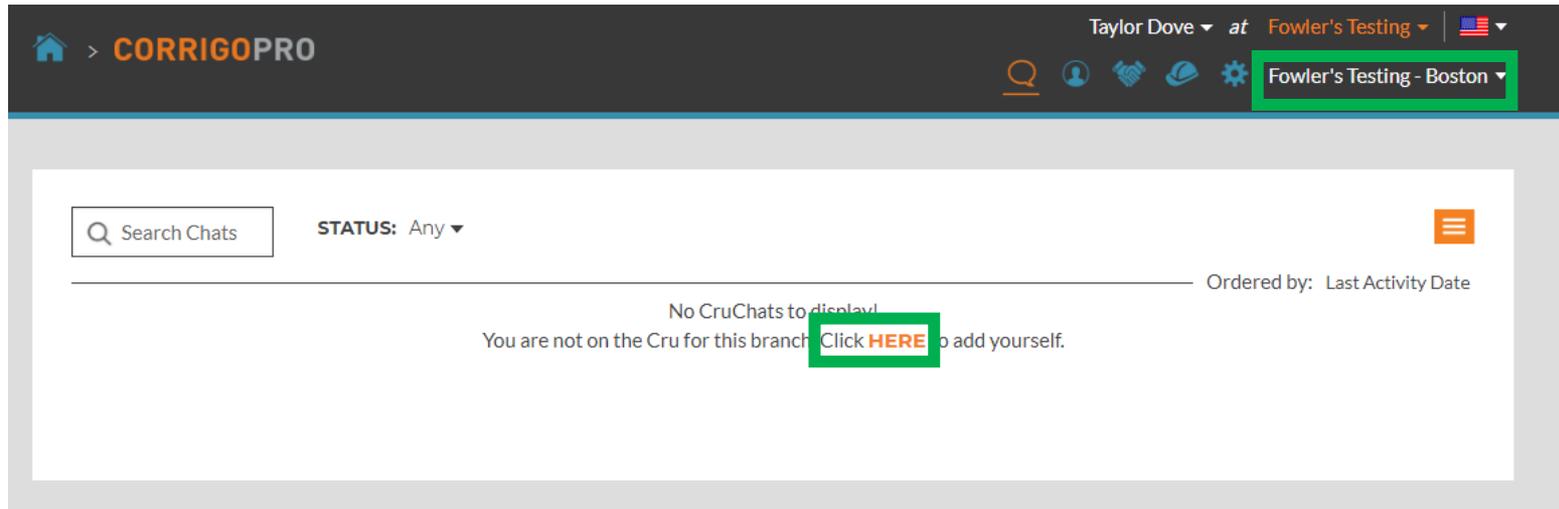
Inviting your Cru from the Desktop (the blue “People” icon at the top right of the Desktop) will give users access to both the Desktop and the mobile app



The screenshot shows a web interface for CORRIGOPRO. At the top, there is a navigation bar with a home icon, the text 'CORRIGOPRO', and user information: 'Taylor Dove' with a dropdown arrow, 'at Fowler's Testing' with a dropdown arrow, and a US flag with a dropdown arrow. Below the navigation bar is a section titled 'Quick Name And Phone Number Confirmation'. The text below the title reads: 'Before we add you to the Cru can we just confirm your name and your cell phone number'. There are two input fields: 'MY CRU NAME' with the value 'Taylor Dove' and 'MY CELL #' with the value '+17703624197'. Below these is a section titled 'SELECT BRANCHES WHERE YOU WANT TO BE ON THE CRU'. This section contains a list of two items: 'Fowler's Testing - Atlanta' and 'Fowler's Testing - Boston', each with a checked checkbox. A green rectangular box highlights this list. At the bottom right of the form is an orange button labeled 'JOIN THE CRU'.

When they join, they will have the opportunity to choose the branches that they need to have access to - these can be removed later if need be

# Add Your Cru – As Needed



The final way to join a branch occurs when an Administrator selects a branch that they are not currently a member of while in the CruChats section

They will see the option to “Click Here” to add themselves to the branch – and once again, these can be removed later if need be

This method will only work for Administrators, however.

# Our Cru – Users Added

Below you see the same Boston branch after the users have been added

The screenshot shows the CORRIGOPRO interface for the 'Fowler's Testing - Boston' branch. The top navigation bar includes the CORRIGOPRO logo, user name 'Thomas', and a dropdown menu for the branch. The main content area features a search bar, filter buttons for 'CruLeads' and 'CruMembers', and a list of users ordered by name (A-Z). The users listed are Rob, Ryan Bernardez, Thomas, and an 'INVITED' user. The 'INVITED' user is highlighted with a green border.

Name	Phone Number	Role	Status
+			
Rob	(770) 560-5884	CruMember	Accepted
Ryan Bernardez	(404) 557-1844	CruMember	Accepted
Thomas		CruLead	Accepted
INVITED	(678) 224-5233	CruMember	Not Accepted

Note that one of the individuals has not yet accepted their invitation – still appearing as “Invited”

# Our Cru – Original Branch

The screenshot shows the CORRIGOPRO web application interface. The top navigation bar includes a home icon, the text '> CORRIGOPRO', and user information 'Thomas' with a dropdown arrow and a US flag. A dropdown menu is open, showing 'Fowler's Testing - Atlanta' selected. Below the navigation bar, there is a search bar labeled 'Search Cru'. Underneath the search bar, there are filter buttons for 'CruLeads' and 'CruMembers'. To the right, it says 'Ordered by: Name (A-Z)'. The main content area displays a list of users. The first user is 'Thomas', shown as a card with a plus sign in a circle and the text 'CruLead'.

When selecting the original branch, Atlanta, you will see that it still only has the original user in it - the addition of users in the Boston branch did not affect it

# Our Cru – All Branches

The screenshot displays the CORRIGOPRO web application interface. At the top, the navigation bar includes a home icon, the text 'CORRIGOPRO', and a user profile for 'Thomas' with a dropdown arrow. A green box highlights the 'All Branches' dropdown menu. Below the navigation bar, there is a search bar labeled 'Search Cru' and filter buttons for 'CruLeads' and 'CruMembers'. The main content area shows a list of Cru members, ordered by name (A-Z). The members listed are Rob (770) 560-5884, Ryan Bernardez (404) 557-1844, and Thomas. A tooltip for Thomas is visible, showing he is a CruLead at Fowler's Testing in Atlanta and Boston. An 'INVITED' member with phone number (678) 224-5233 is also shown.

When viewing “All Branches”, you will see all Cru that have been added for all branches – if you hover your cursor over a user, you will see all of the branches they are associated with, and whether they are a CruLead or CruMember in each

# Deleting a User From a Branch

It is possible to delete a user from a branch while still leaving that user active in other branches

The screenshot shows the CORRIGOPRO user management interface. At the top right, the user 'Thomas' is logged in, and the selected branch is 'Fowler's Testing - Boston'. A search bar is present with the text 'Search Cru'. Below the search bar, there are filter buttons for 'CruLeads' and 'CruMembers'. The interface shows a list of users with their names, phone numbers, and roles. The 'DELETE' button is highlighted in orange. The user 'Rob' is highlighted with a green border, and the 'DELETE' button is also highlighted with a green border.

Name	Phone Number	Role
Rob	(770) 560-5884	CruMember
Ryan Bernardez	(404) 557-1844	CruMember
Thomas		CruLead
Invited User	(678) 224-5233	CruMember

First, select the desired branch from the dropdown at the top right

Then, select the user in question – when you do, your options will appear in orange boxes

For an active user, you can start a CruChat, change their role, or delete them

Select “Delete” to delete the user in question from this branch only

# Connecting Your Customers

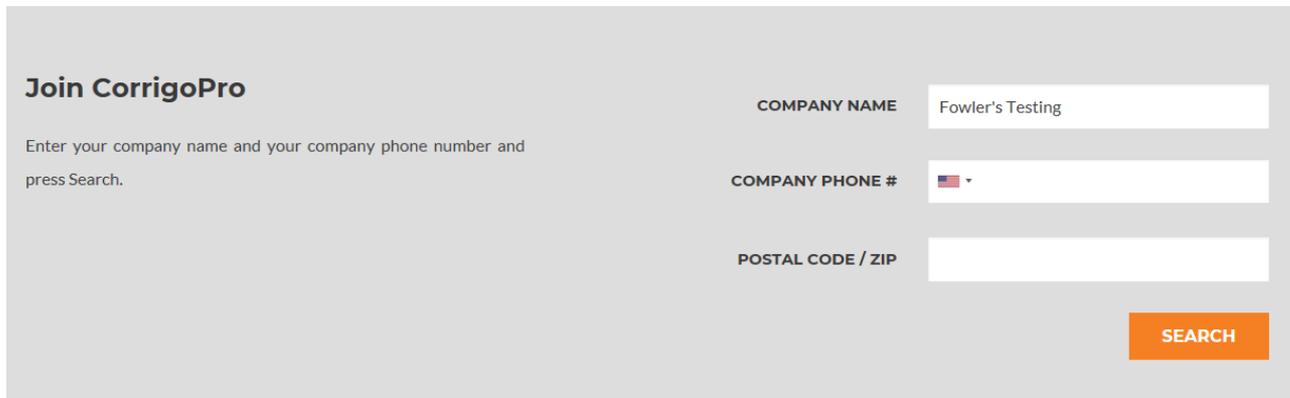
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Now that your users have been added, you will need to connect your customer(s) to it

If you are looking to move existing customer connections to this newly created branch, you are going to need Corrigo's help - Please contact us at [connect@corrigo.com](mailto:connect@corrigo.com)

If you are looking to add a new Corrigo customer to this branch, then the first step will be to receive an invitation from them – ask them for it if you have not received one

Once received, click the link in the invitation, and you will see the below screen



**Join CorrigoPro**

Enter your company name and your company phone number and press Search.

COMPANY NAME

COMPANY PHONE #

POSTAL CODE / ZIP

**SEARCH**

The process to connect is easy – first enter your company name (or the exact branch name), and then click “Search”

# Connecting Your Customers

If you searched for your company name, then all of your associated branches will appear, including the one you just created

## Found Your Company Listed?

Click your company name if you see it listed in the table below.

COMPANY NAME	PHONE #	ADDRESS
<b>FOWLER'S TESTING - BOSTON</b>	(404) 867-5309	123 Main St., Boston, MA 02151
<b>FOWLER'S TESTING - ATLANTA</b>	(404) 867-5309	1111 Alderman Drive, Suite 270, Alpharetta, GA 30005

Select the desired branch

In this case, we are selecting the Boston branch – the one that we just created

## Didn't Find Your Company Listed Above?

Add your business to the CorrigoPro

[BACK](#)

[ADD](#)

Do not click the “Add” link at the bottom of the page – if your branch did not appear, please go back and refine your search parameters

# Connecting Your Customers

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The ensuing page will let you know that this branch has already been claimed - and you are the one that claimed it

Click “Log In Here” and enter your credentials, and you will connect with your customer in your new branch

## Fowler's Testing - Boston Has Already Been Claimed

What you can do:

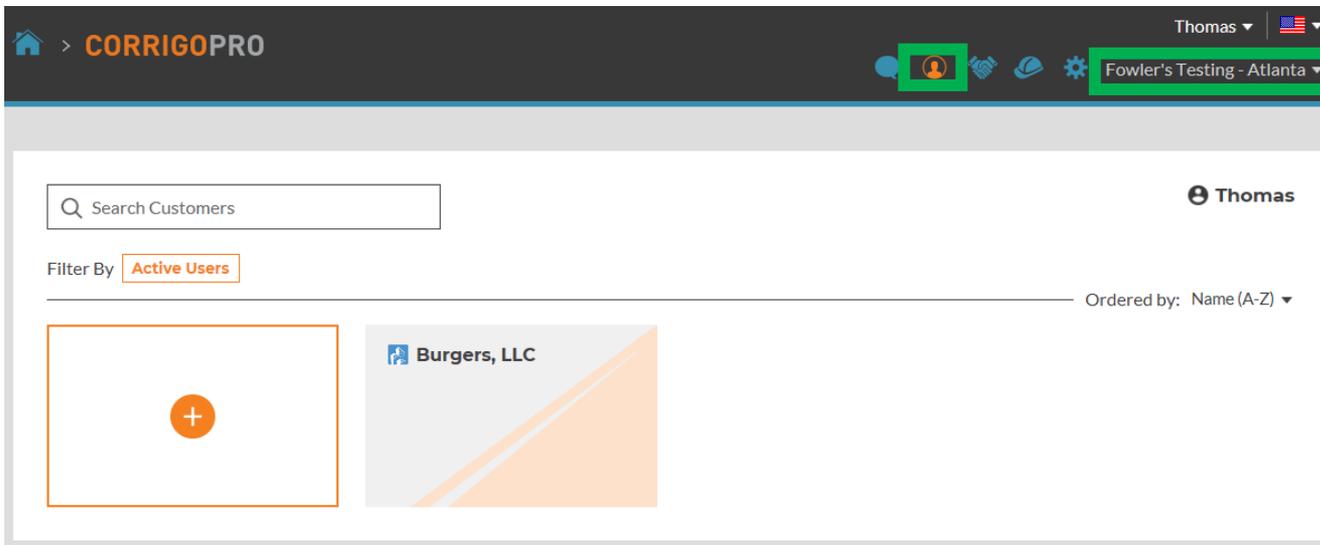
- If this is your business, please [LOG IN HERE.](#)
- If you believe this business was claimed in error, call our Support Team at +18777018326.

# Viewing Your Customers

To see the customers that you have connected in each branch, first select the desired branch from the drop down menu at the top right

Then select the “Our Customers” icon from the menu at the top

Your customers will display in individual boxes



Please note that your customers will only display here after the first work order has been received

If you have just added a customer and want to verify that it is correct, you can do so from your Scoring Tile on the Desktop

# Questions

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Contact Corrigo via phone or online:

<https://corrigo.com/contactus/>