Communicating using CruChats

Using and Managing CruChats through the CorrigoPro
Desktop and Mobile App

During this tutorial we will cover…

- Reviewing CorrigoPro Desktop CruChats

- Selecting CruChat recipients

- Initiating CruChats from CorrigoPro Desktop

- CruChats with a work order

- CorrigoPro Mobile App CruChats

- Initiating CruChats from the CorrigoPro Mobile App

- Selecting CruChat participants

- Attaching a picture to a CruChat

CorrigoPro Desktop CruChats

CruChats are instant communications between you, your team, your business partners, and your customers

Begin by clicking on the CorrigoPro tile in the CorrigoPro Desktop

CorrigoPro Desktop CruChats

This is the CruChat landing page where you will have multiple filter options, to sort and view your CruChats by specific categories

CorrigoPro Desktop CruChats

Your work orders can be filtered by a number of options. As an example, you can sort using "Unread" from the Status menu, and "This Week" from the Complete By menu

CorrigoPro Desktop CruChats

In this example, a single CruChat remains when filtering by "Unread" and "This Week"

Click anywhere on the CruChat to view the body of the message and/or the details of the work order

CorrigoPro Desktop CruChats

Click "SEND"

To send a message in this CruChat, just type
your message in the text box

Initiating a CruChat

You may initiate a CruChat with your Cru / Subs , you <u>CANNOT</u> initiate a CruChat with a customer, this has to be initiated by the customer

To start a CruChat with your CruMembers and/or CruLeads, click on the *Our Cru* icon in the upper right

Start a CruChat

Check the box for CruMembers that you'd like to include in the CruChat, then click the "CRUCHAT" button near the top of the window.

Congratulations!

You've successfully initiated a CruChat with your team
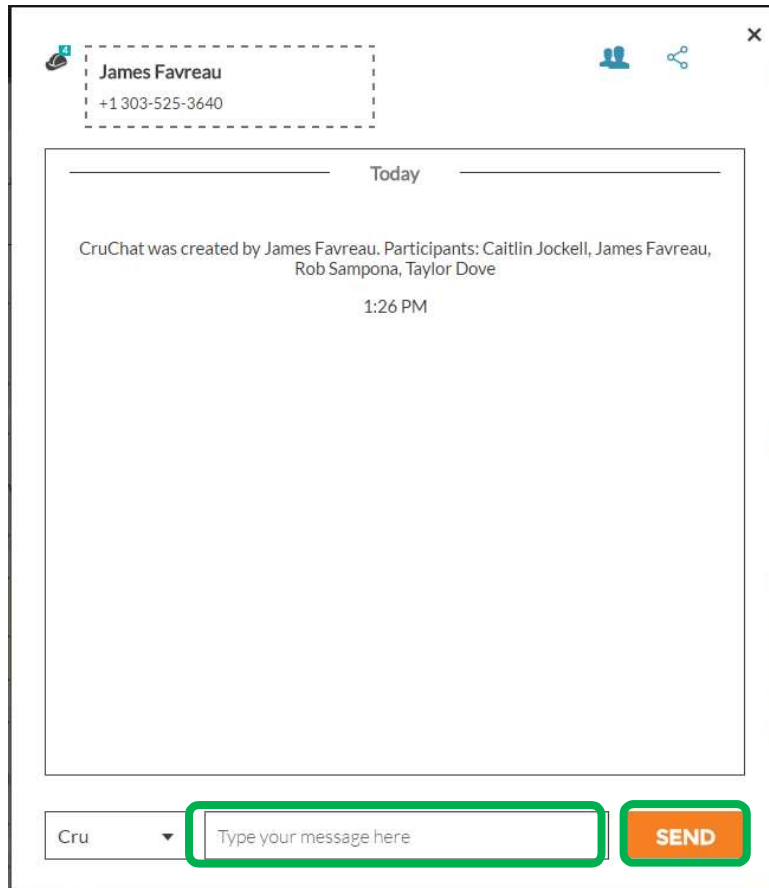
You now have a real-time, interactive communication with your Cru

To begin the discussion, type your message in the text box

Click "SEND"

Adding and Removing CruChat Participants

You can add or remove CruMembers and Subcontractors in any CruChat
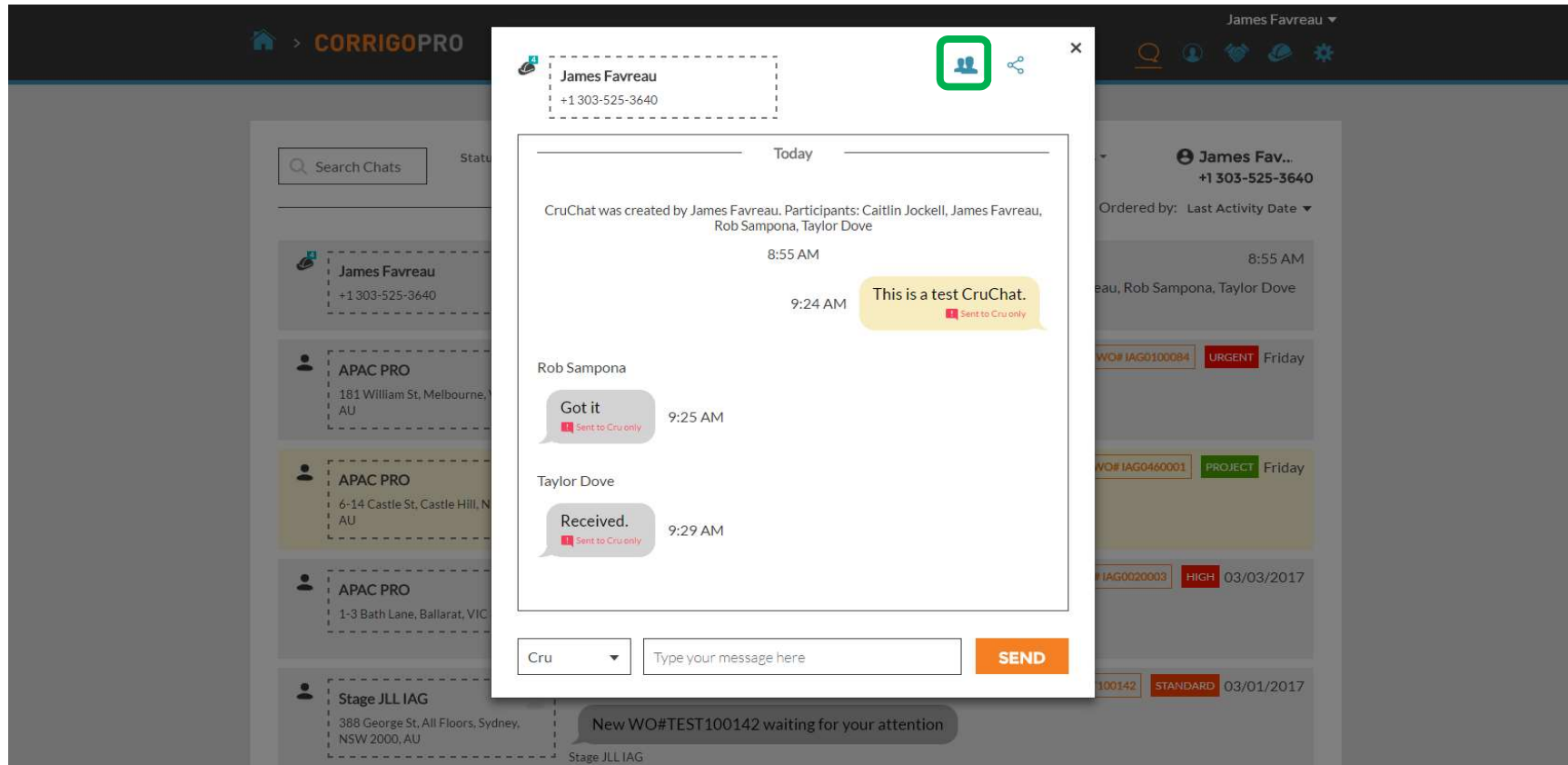
To add or remove a participant in your chat, click the two-person silhouette icon at the top of the chat box

Adding and Removing CruChat Participants
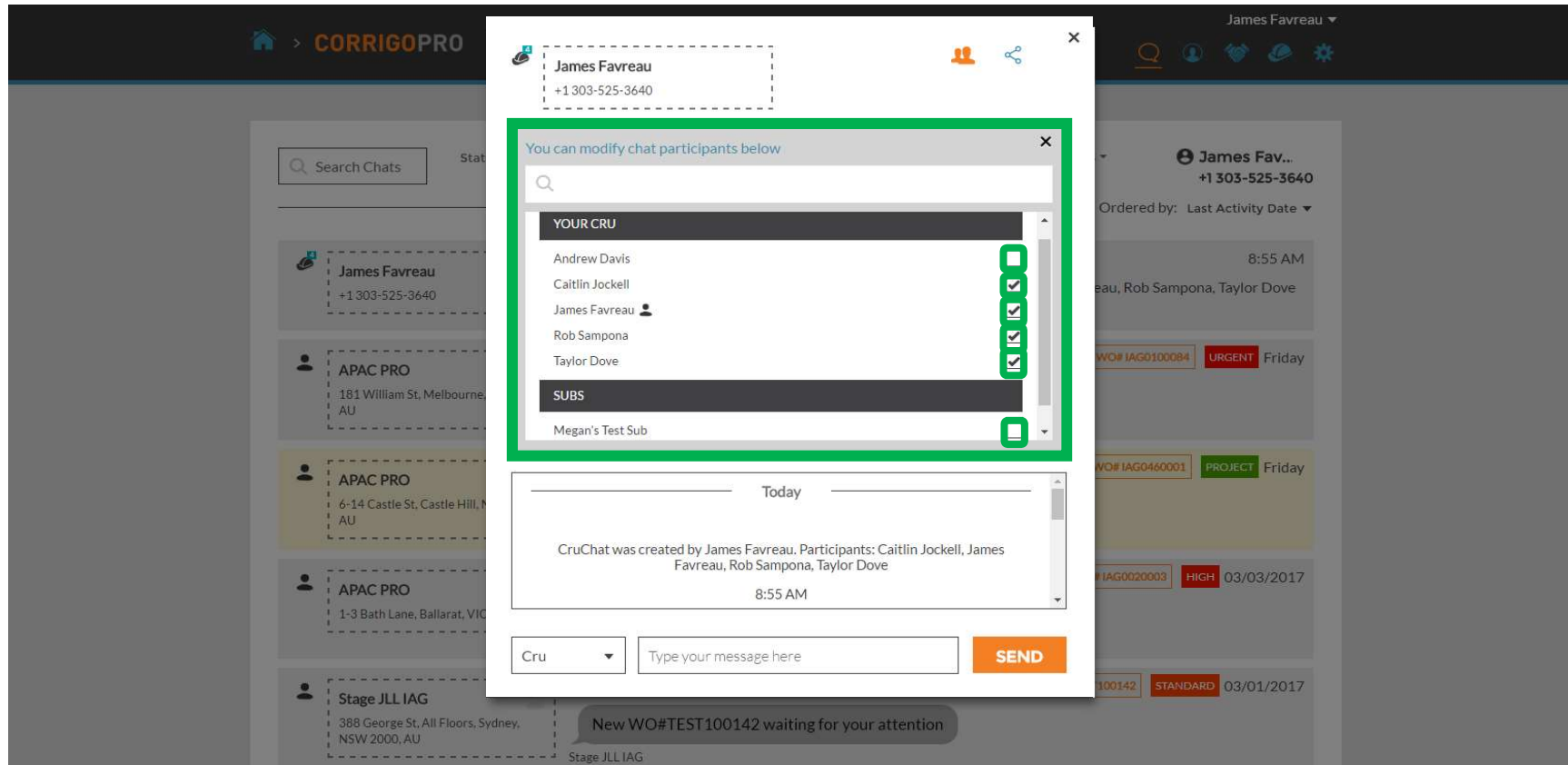
A scrollable drop-down box will open with your Cru and Subs listed

Select or deselect your CruChat participants by clicking the individual check boxes on the right

CruChats With Work Orders

CruChats from your Corrigo customers may have a work order included

A CruChat with a work order associated with it will have an orange box with the work order number, and a color coded box with the priority level indicated

Click on a work order CruChat to open the CruChat window and review the work order details

CruChats With Work Orders

Customer is indicated on the left side of the CruChat

You can choose which participants receive your CruChat messages by clicking on the menu to the left of the message box.
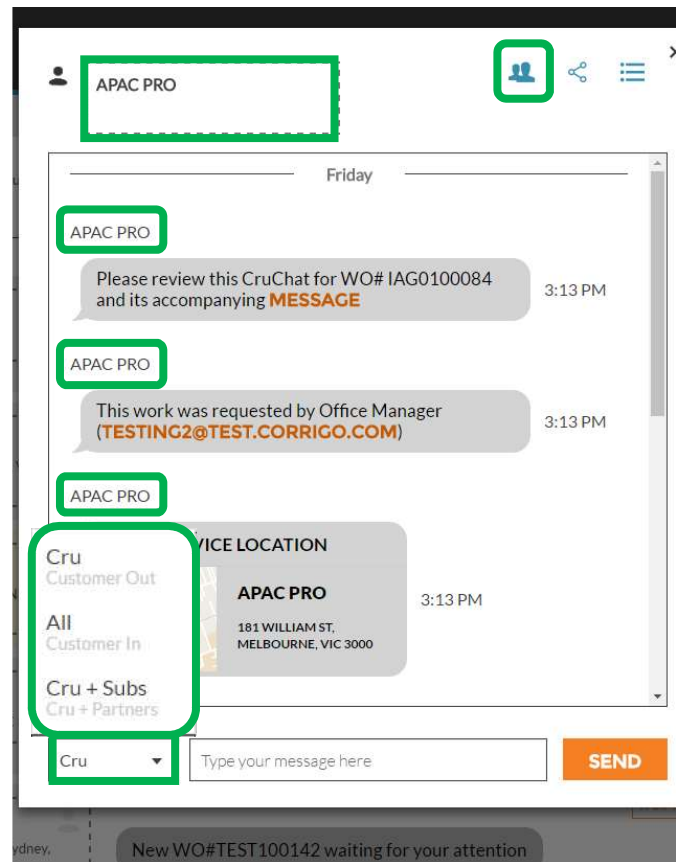
As with any CruChat, you may add or remove participants by clicking the silhouettes icon at the top.

CruChat participant group options will appear.

Choose Participants
Cru - Cru Only
Cru+Subs – Cru and Subs
All - Cru and Subs and Customer

CorrigoPro Mobile App: CruChats

You can manage all your CruChats and work orders from your mobile device
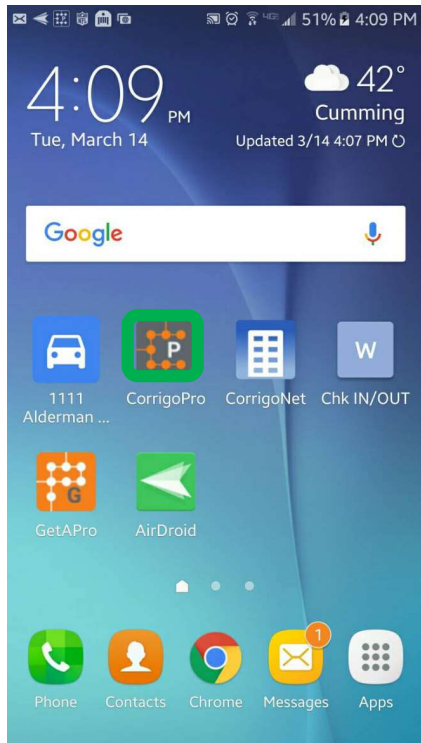
Install CorrigoPro mobile app

Tap to open the app

Your Crus will appear on the first screen.

Tap on a Cru to access the related CruChats and options.
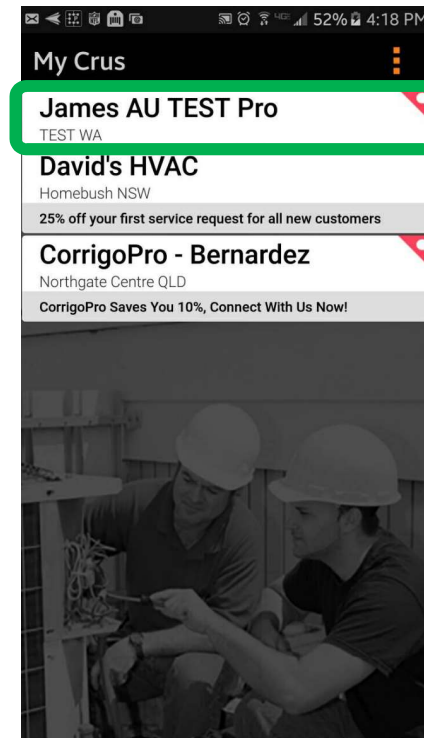
CorrigoPro Mobile App: CruChats
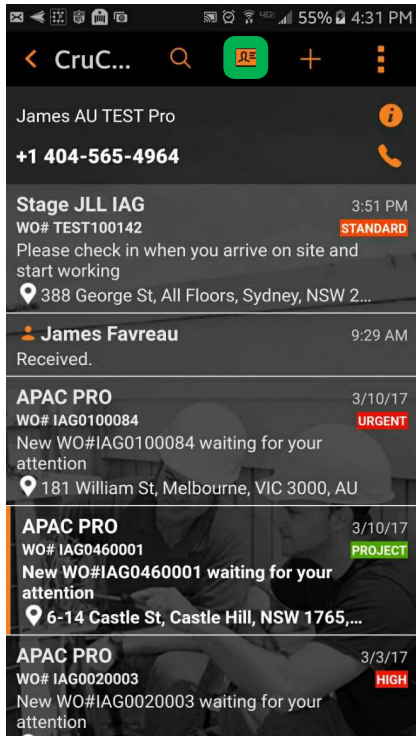
To invite someone to connect, tap on the orange business card icon

This will bring up all of your contacts including your customers/Subs/Cru
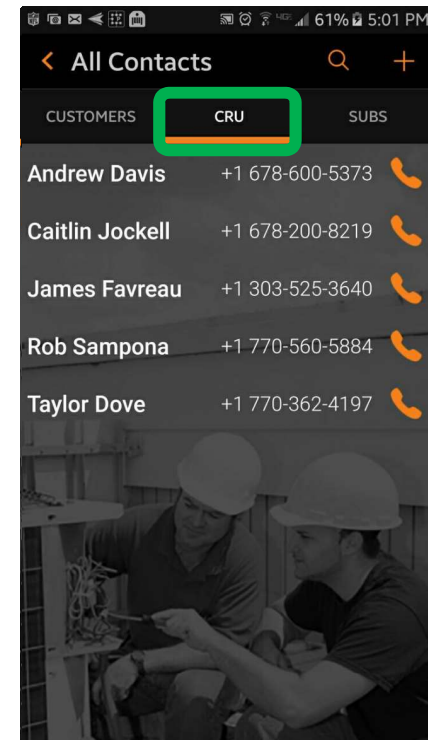
CorrigoPro Mobile App:
Invite A Customer
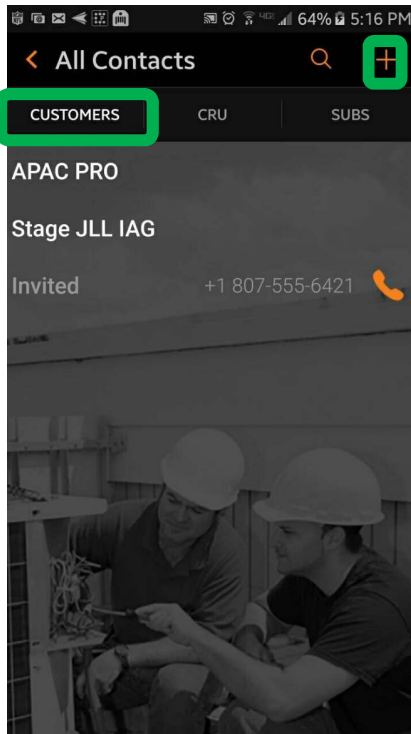
To invite a customer to connect, tap on the "CUSTOMERS" tab in

Then tap on the orange *plus* symbol

Enter your customer's mobile phone number, add a brief message, and tap "Invite"
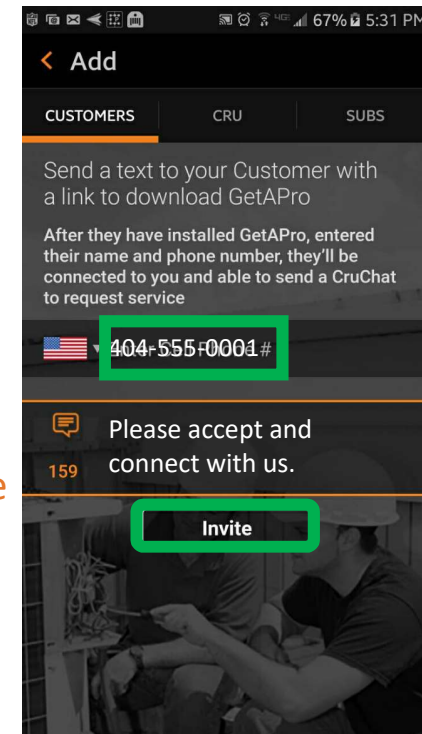
Your customer will receive a text message invitation with a link to download the CorrigoPro Request App

Once they have the CorrigoPro Request App installed, your customer will be connected to you and able to send you CruChats to request service

CorrigoPro Mobile App:
Invite A Subcontractor (Sub)
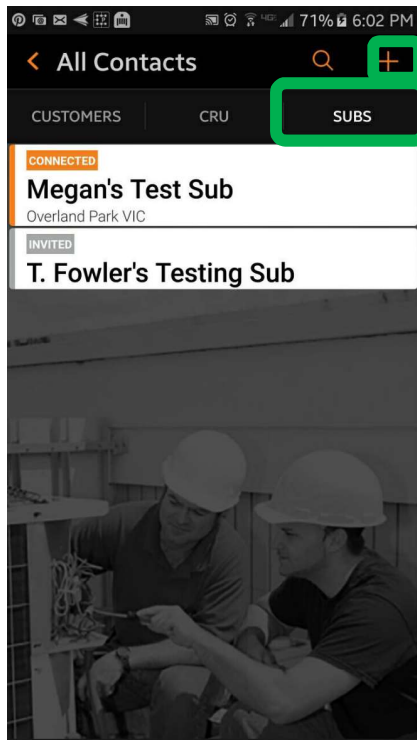
To invite a sub to connect tap on the "SUBS" tab in your contacts list.

Then tap on the orange **plus** symbol

Enter your sub's company name, and phone number, then tap "Search"

The system will perform a search to see if the sub is already connected in the CorrigoPro Network

If the sub is already on the network, you'll be able to tap on the sub and automatically connect with them

CorrigoPro Mobile App:
Invite A Subcontractor (Sub)

Add Sub

We're sorry but we couldn't find any Service Providers in our directory containing the name or the phone # you searched for.

Invite your sub company to sign up by entering their email or cell phone #
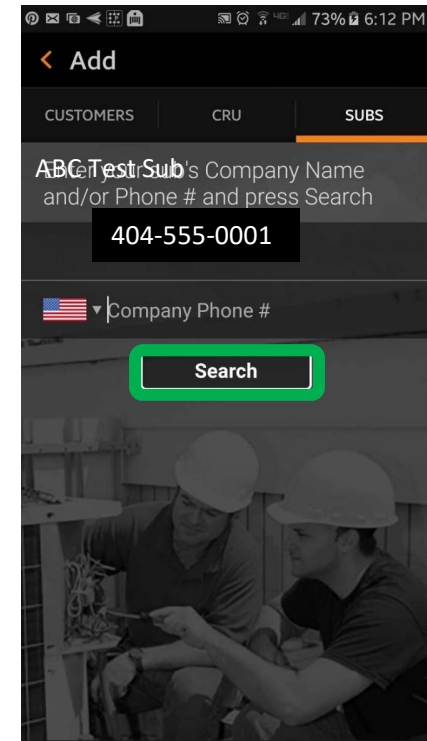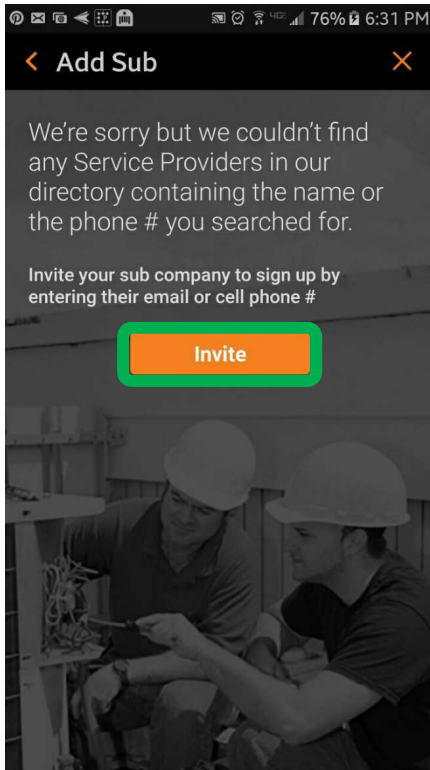
Invite

If the sub does not appear in the system, tap on "Invite"

Your sub's company name and company phone number will already be entered from the previous search

Enter a valid email address

Type in an accompanying message to your sub

Tap "Send Invite"

Invite Sub

Specify the company name, email or cell phone # where the invite will be sent to

ABC Test Sub

test@abc.com

404-555-0001

If you specify the phone #, please make sure that this is a cell phone # enabled to receive text messages. The invite will be sent through text

Message (160 characters max)
160   Please accept and connect.

Send Invite
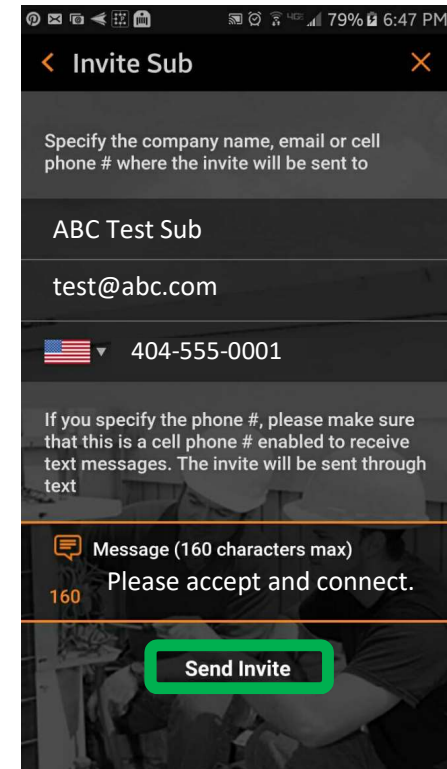
CorrigoPro Mobile App:
Invite A Subcontractor (Sub)

The sub will now be listed in your SUBS contact list with an "INVITED" status

Once your sub accepts the invitation and downloads the CorrigoPro Mobile App, their status will change to "CONNECTED"
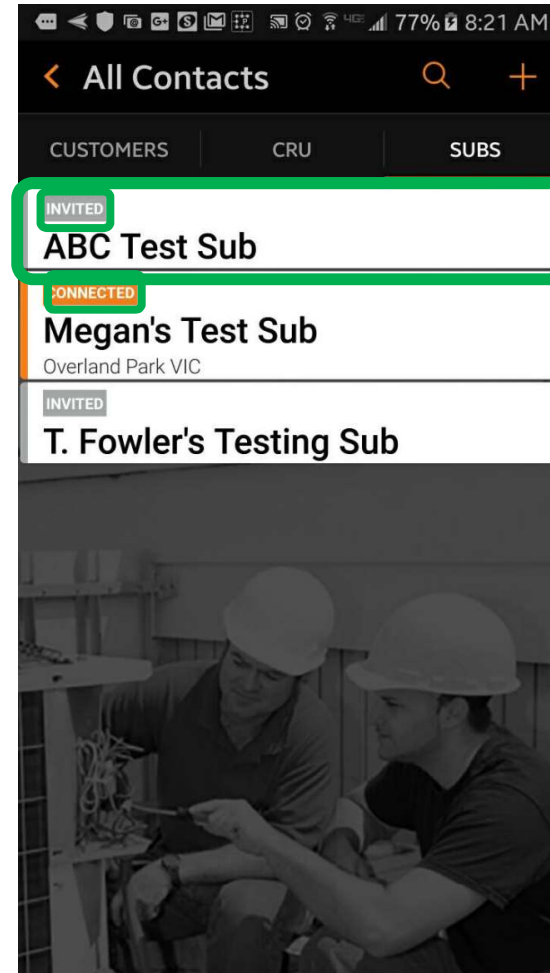
CorrigoPro Mobile App:
Invite CruMembers / CruLeads

To invite your CruMembers to connect, tap on the "CRU" tab in your contacts list

Then tap on the orange *plus* symbol
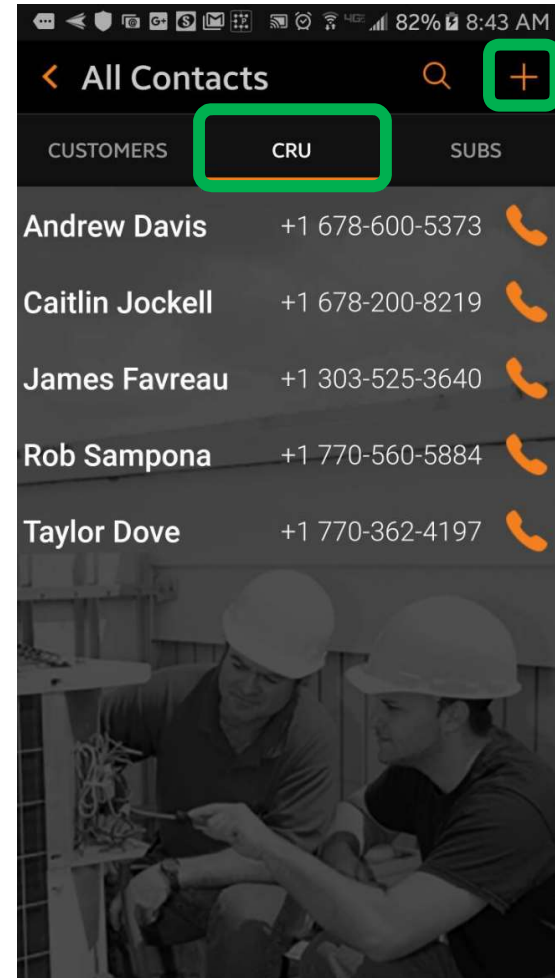
CorrigoPro Mobile App:
Invite CruMembers / CruLeads

Enter your CruMember's mobile phone number and optional invite message

You may invite your new user as a CruMember or as a CruLead

A CruLead is typically someone in a leadership or dispatch role and can see all CruChats.

A CruMember must be added to a CruChat. Typically, Curleads are technicians or field personnel that only need to be included in specific conversations

To designate the invitee as a CruLead, tap the checkbox in the CruLead section

Tap "Invite"
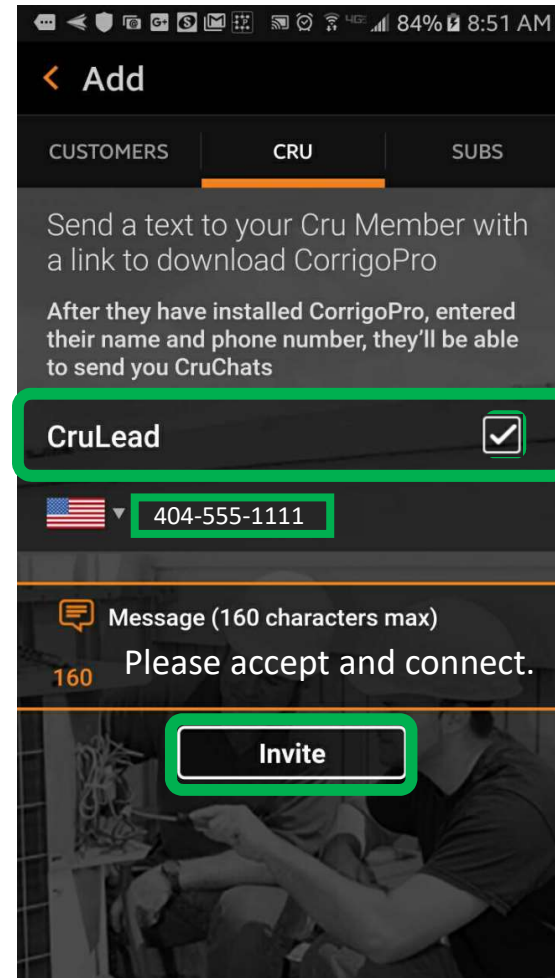
CorrigoPro Mobile App:
Invite CruMembers / CruLeads

Once a new CruMember or CruLead accepts the invitation and downloads the CorrigoPro Mobile App they will be added to your CRU contacts list and available to participate in CruChats
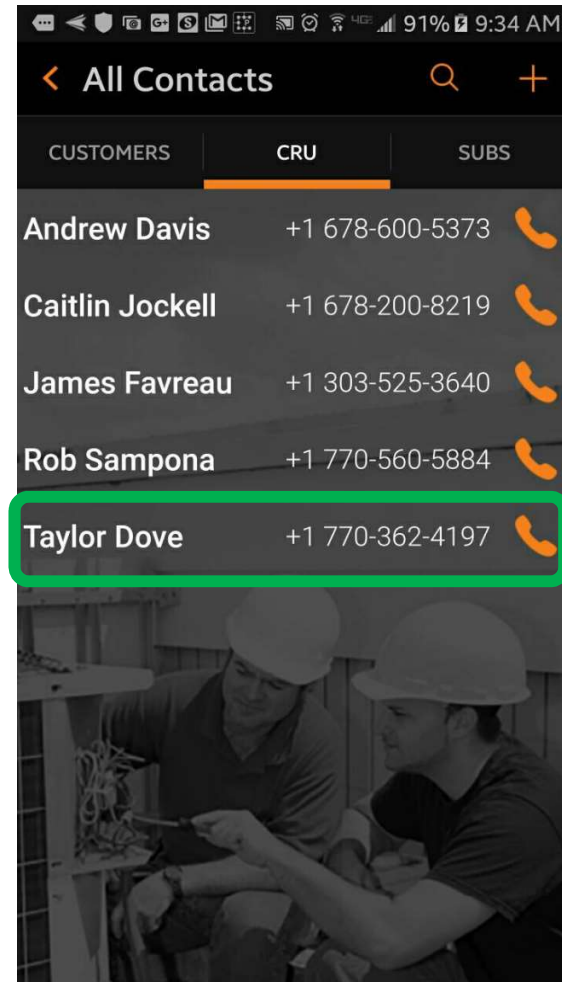
CorrigoPro Mobile App:
Start a CruChat

To create a CruChat, tap on the Cru you wish to communicate with from the initial screen

Then tap on the orange *plus* symbol in the upper right
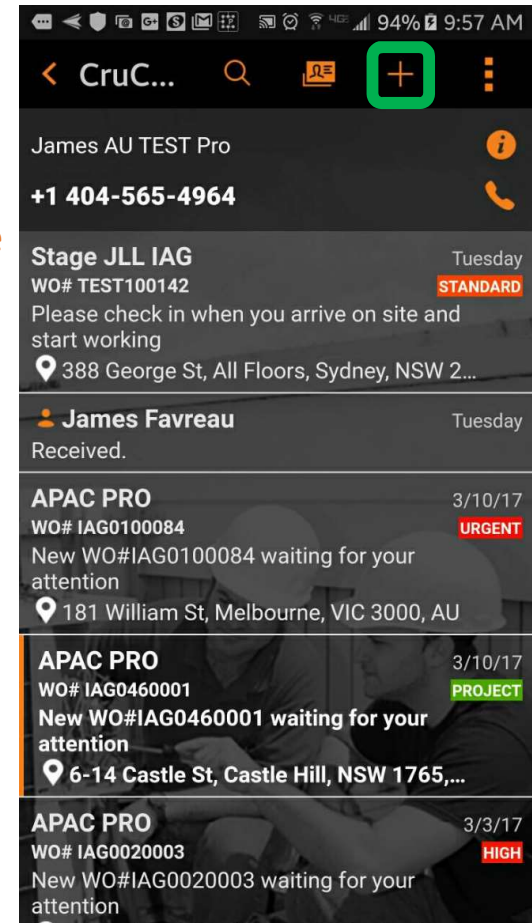
CorrigoPro Mobile App:
Start a CruChat

Next, the list of CruMembers and Subs
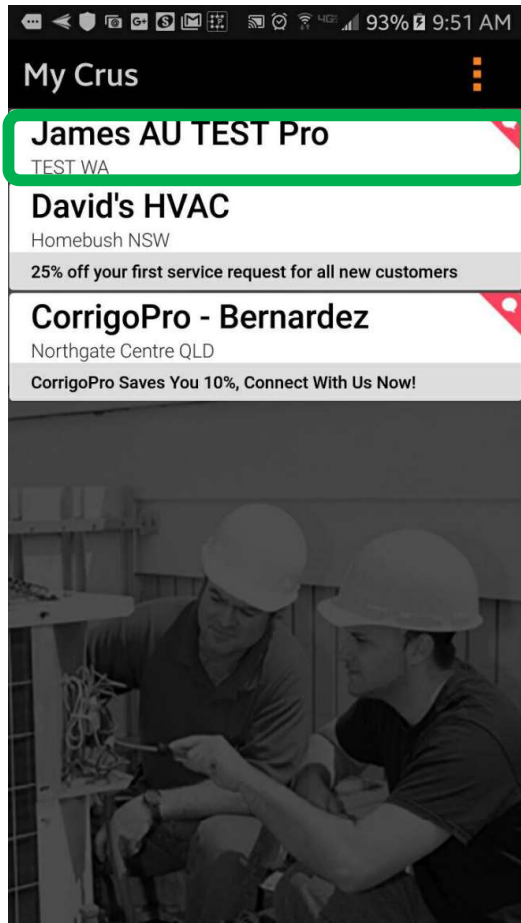you are connected with will be displayed

Select your desired CruChat participants by
tapping the checkbox to the right of their name

Tap the orange checkmark in the upper right to
initiate your CruChat (For iphone the icon is a
"create" button)

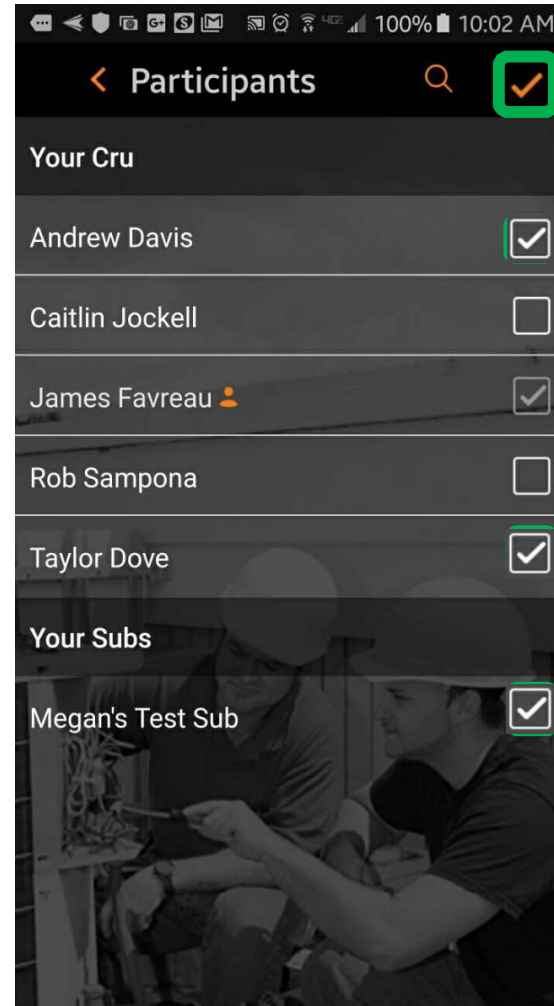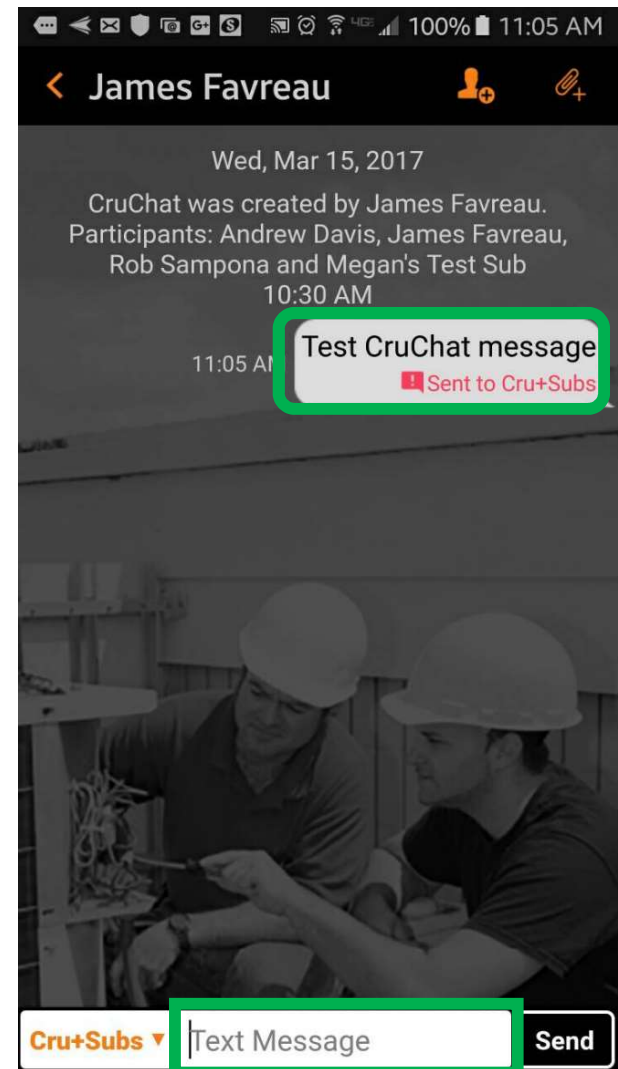# CorrigoPro Mobile App:
Start a CruChat

Now that your CruChat has been created, tap the menu to the left of the text message box to select your participant groups
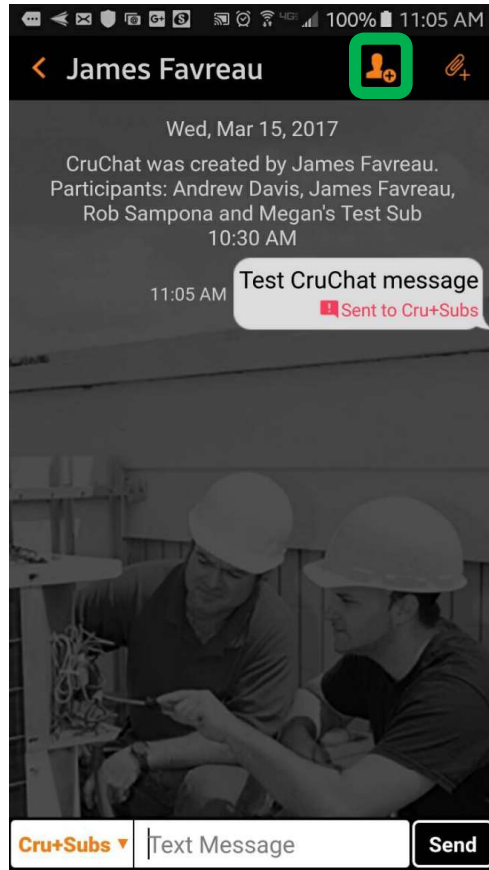
Select "Cru+Subs" or "Cru"

Enter in your message and tap "Send"

Each text bubble will show you who received the chat message

CorrigoPro Mobile:
# Add/Remove CruChat Participants

To add or remove participants of your CruChat, tap on the silhouette icon in the upper right

This will bring up the list of your connected CruMembers and Subs

The CruMembers and Subs already included in the CruChat will have a checkmark in their corresponding checkbox to the right

Select or deselect participants, as needed, by tapping on the checkbox

Then tap the orange save icon in the upper right
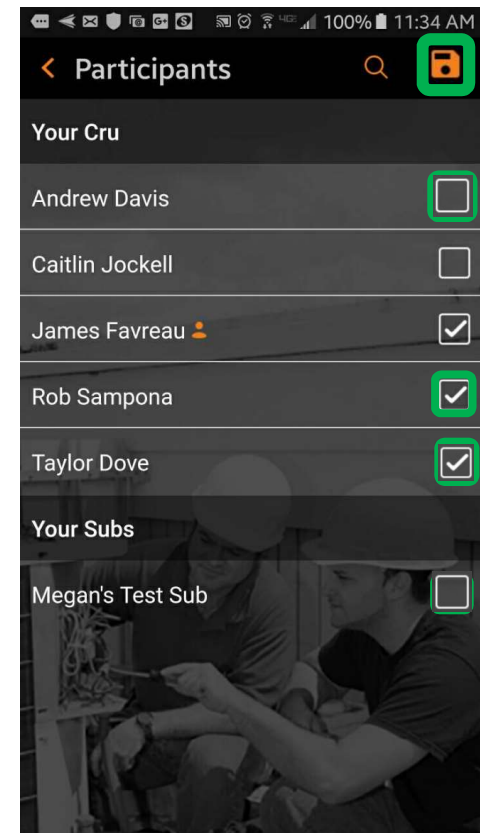
Questions

Contact Corrigo via phone or online:

https://corrigopro.com/contactus/