



CORRIGOPRO

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

The screenshot displays the CorrigoPro Desktop interface. At the top, the user is logged in as 'Waldo David' at 'David's HVAC'. The main dashboard features several tiles:

- Training Tile:** Promotes online training with the text 'SIGN UP FOR ONLINE TRAINING!' and a 'Choose Classes & Register Now' button.
- Profile Tile:** Shows 'David's HVAC' with the CorrigoPro logo and a congratulatory message: 'CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE'.
- Star Tile:** An orange tile with a white star icon.
- Unread Messages Tile:** A green-bordered tile showing a list of unread messages from 'APAC PRO'.
- Score Tile:** Displays '85 your average score' and '2 customers are connected to you'.
- Invoices Tile:** Titled 'YOUR INVOICES NEED ATTENTION', showing 33 ready to be invoiced WOs, 25 draft invoices, and 1 disputed invoice.
- Learn About Tile:** Promotes 'CORRIGOPRO DIRECT' with a puzzle piece graphic.

The CruChat window on the right shows the following unread messages:

- APAC PRO** (Sunday, 30 Carrington St, Ground Floor, Sydney, NSW 2000, ...): The customer has requested a quote for this work.
- APAC PRO** (01/02/2018, 30 Warwick Street, London, GB): Waldo David has submitted the invoice.

There are 226 more unread messages.

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

The screenshot displays the CorrigoPro Desktop CruChats interface. At the top, there is a navigation bar with a home icon, the text '> CORRIGOPRO', and the user name 'James Favreau' with a dropdown arrow. To the right of the navigation bar are several icons: a magnifying glass, a person, a handshake, a hard hat, and a gear.

Below the navigation bar, there is a search bar labeled 'Search Chats' and three filter dropdown menus: 'Status: Any', 'WO State: Any', and 'Complete By: Any'. A 'MORE...' dropdown menu is also present. The user's name 'James Fav...' and phone number '+1 303-525-3640' are displayed. A dropdown menu for 'Ordered by: Last Activity Date' is also visible.

The main content area shows a list of chat messages. Each message card includes a profile picture, the name 'APAC PRO', an address, a message bubble, and a status box. The messages are as follows:

- Message 1:** APAC PRO, 181 William St, Melbourne, VIC 3000, AU. Message: 'New WO#IAG0100084 waiting for your attention'. Status: 'WO# IAG0100084 URGENT Friday'.
- Message 2:** APAC PRO, 6-14 Castle St, Castle Hill, NSW 1765, AU. Message: 'New WO#IAG0460001 waiting for your attention'. Status: 'WO# IAG0460001 PROJECT Friday'.
- Message 3:** APAC PRO, 1-3 Bath Lane, Ballarat, VIC 3350, AU. Message: 'New WO#IAG0020003 waiting for your attention'. Status: 'WO# IAG0020003 HIGH 03/03/2017'.
- Message 4:** Stage JLL IAG, 388 George St, All Floors, Sydney, NSW 2000, AU. Message: 'New WO#TEST100142 waiting for your attention'. Status: 'WO# TEST100142 STANDARD 03/01/2017'.

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

The screenshot displays the CorrigoPro Desktop CruChats interface. At the top, the user is logged in as James Favreau. The main area shows a list of work orders (WOs) with various filters and sorting options. A search bar is visible on the left. The filters include 'WO State: Any' and 'Complete By' (set to 'This Week'). The sorting is set to 'Last Activity Date'. The work order cards are listed below, each with a status and a message.

| Company | Address | WO# | Status | Date | Message |
|---------------|---|----------------|----------|------------|--|
| APAC PRO | 181 William St, Melbourne, VIC 3000, AU | WO# IAG0100084 | URGENT | Friday | New WO#IAG0100084 waiting for your attention |
| APAC PRO | 6-14 Castle St, Castle Hill, NSW 1765, AU | WO# IAG0460001 | PROJECT | Friday | New WO#IAG0460001 waiting for your attention |
| APAC PRO | 1-3 Bath Lane, Ballarat, VIC 3350, AU | WO# IAG0020003 | HIGH | 03/03/2017 | New WO#IAG0020003 waiting for your attention |
| Stage JLL IAG | 388 George St, All Floors, Sydney, NSW 2000, AU | WO# TEST100142 | STANDARD | 03/01/2017 | New WO#TEST100142 waiting for your attention |

CorrigoPro Desktop CruChats

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

The screenshot displays the CorrigoPro Desktop CruChats interface. At the top, the user is logged in as James Favreau. The main navigation bar includes a home icon, the CorrigoPro logo, and several utility icons. Below the navigation bar, there is a search bar labeled "Search Chats" and three filter dropdowns: "Status: Unread", "WO State: Any", and "Complete By: This Week". A "MORE..." dropdown is also visible. The chat list shows a single entry for "APAC PRO" with the address "181 William St, Melbourne, VIC 3000, AU". The chat message reads "New WO#IAG0100084 waiting for your attention". The chat details include "WO# IAG0100084", "URGENT", and "Friday". The chat is highlighted with a green border.

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

CorrigoPro Desktop CruChats

The screenshot displays the CorrigoPro desktop interface. A central window titled "APAC PRO" shows a chat conversation. The chat messages are:

- APAC PRO: Please review this CruChat for WO# IAG0100084 and its accompanying **MESSAGE** 3:13 PM
- APAC PRO: This work was requested by Office Manager (**TESTING2@TEST.CORRIGO.COM**) 3:13 PM
- APAC PRO: **SERVICE LOCATION**
APAC PRO
181 WILLIAM ST,
MELBOURNE, VIC 3000 3:13 PM

At the bottom of the chat window, there is a text input box labeled "Type your message here" and a "SEND" button. A green border highlights the text input box and the "SEND" button. A red box highlights the "SEND" button with the text "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 CANNOT initiate a CruChat with a customer, this has to be initiated by the customer

The screenshot displays the CORRIGOPRO web interface. In the top right navigation bar, the 'Our Cru' icon is highlighted with a green box. Below the navigation bar, the main content area shows a list of CruChats. The interface includes a search bar, filters for Status, WO State, and Complete By, and a 'MORE...' dropdown. The chat list is ordered by 'Last Activity Date'. The first chat is from APAC PRO (181 William St, Melbourne, VIC 3000, AU) with a message 'Thank you for providing visual reference!' and a status of 'URGENT' (WO# IAG0100085) on Friday. The second chat is from APAC PRO (Caxton Road, Bedford, MK41 0EW, GB) with a message 'New WO#EO300008 waiting for your attention' and a status of 'STANDARD' (WO# EO300008) on Thursday. The third chat is from APAC PRO (6-14 Castle St, Castle Hill, NSW 1765, AU) with a message 'APAC PRO rated this work as Positive' and a status of 'PROJECT' (WO# IAG0460001) on Thursday. The fourth chat is from APAC PRO (181 William St, Melbourne, VIC 3000, AU) with a message 'Please check in when you arrive on site and start working' and a status of 'URGENT' (WO# IAG0100084) on Thursday. The fifth chat is from James Favreau (+1303-525-3640) with a message 'James Favreau has removed Andrew Davis and Megan's Test Sub from this CruChat' on Wednesday. At the bottom, it shows 'Showing CruChats 1 to 5 of 8' and navigation arrows.

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

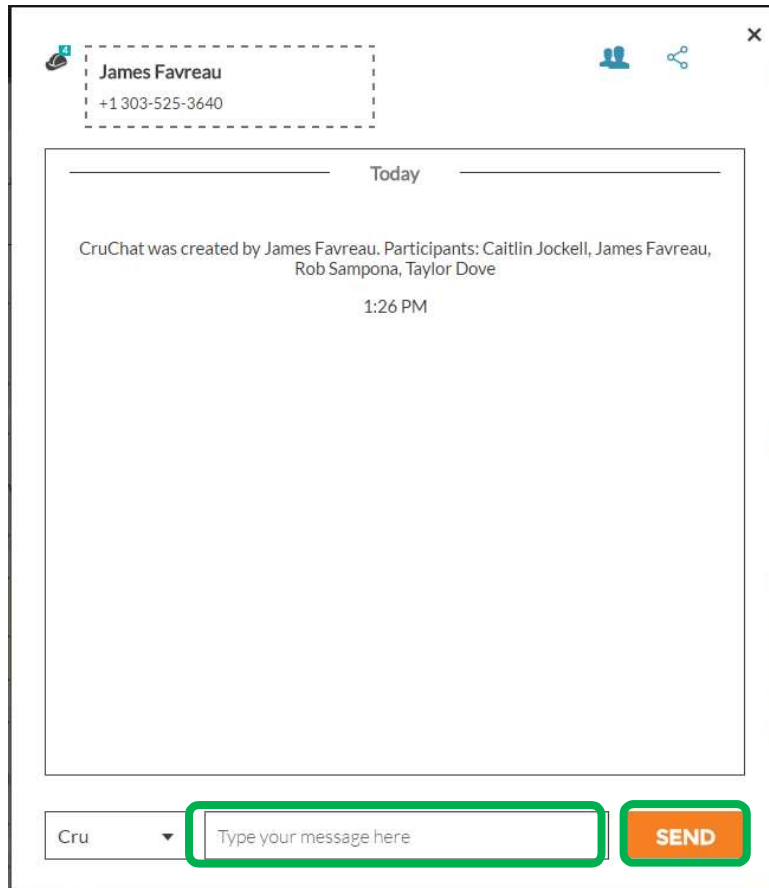
Start a CruChat

The screenshot shows the CORRIGOPRO interface for starting a CruChat. At the top, there is a navigation bar with a home icon, the text 'CORRIGOPRO', and a user profile for 'James Favreau'. Below the navigation bar, there is a search bar labeled 'Search Cru' and filter buttons for 'CruLeads' and 'CruMembers'. The interface indicates that 3 mobile users are selected, with options to 'SELECT ALL USERS' or 'SELECT NONE'. A row of action buttons is visible: 'CRUCHAT' (highlighted with a green box), 'REINVITE', 'CHANGE ROLE', and 'DELETE'. Below this, there are five user cards. The first card is a placeholder with a plus sign. The other four cards represent mobile users: Andrew Davis (CruMember), Caitlin Jockell (CruMember), James Favreau (CruLead), Rob Sampona (CruLead), and Taylor Dove (CruMember). Each user card has a checkbox in the top right corner, which is checked for Caitlin Jockell, Rob Sampona, and Taylor Dove.

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



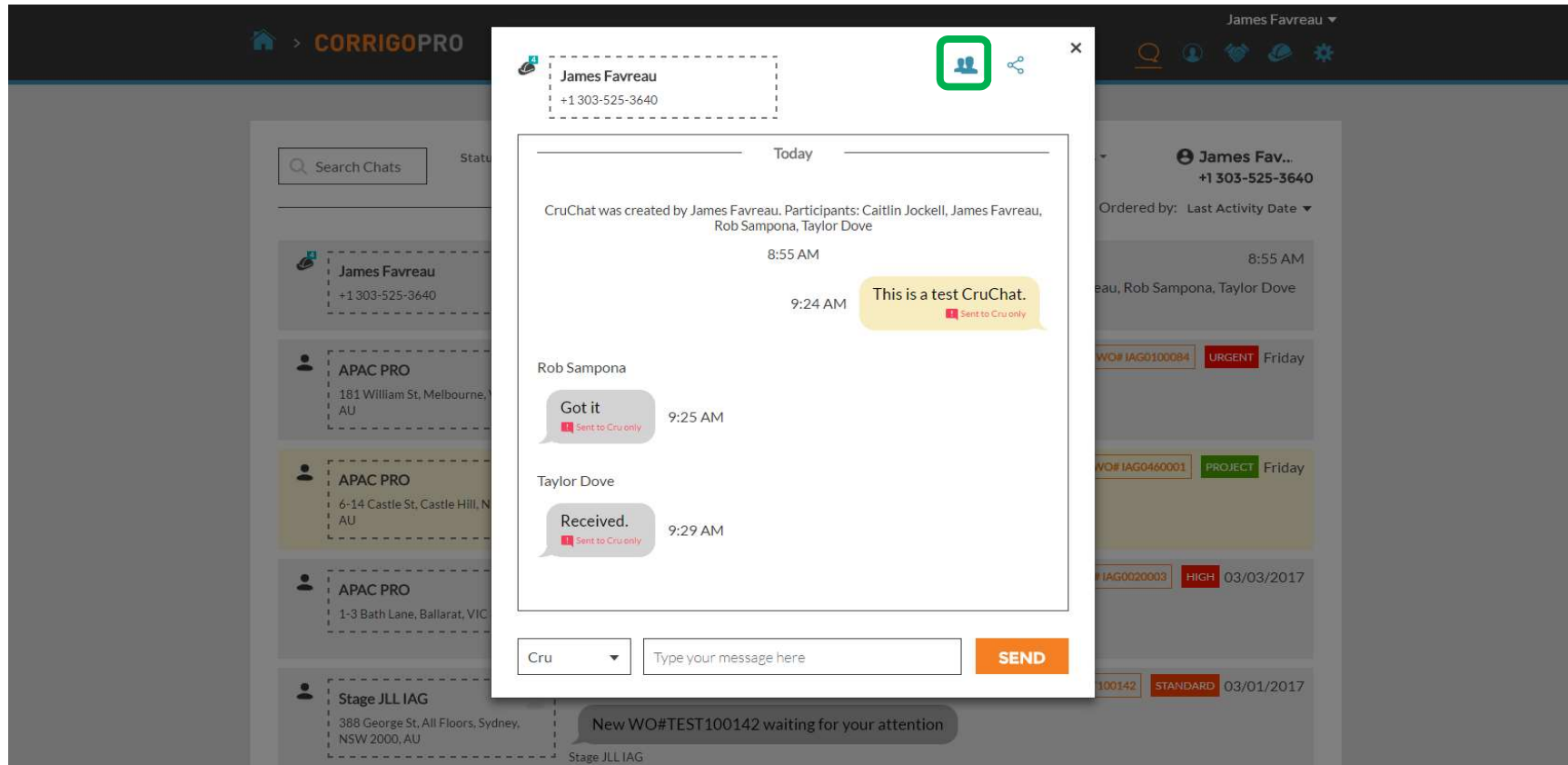
You now have a real-time, interactive communication with your Cru

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

Click "SEND"

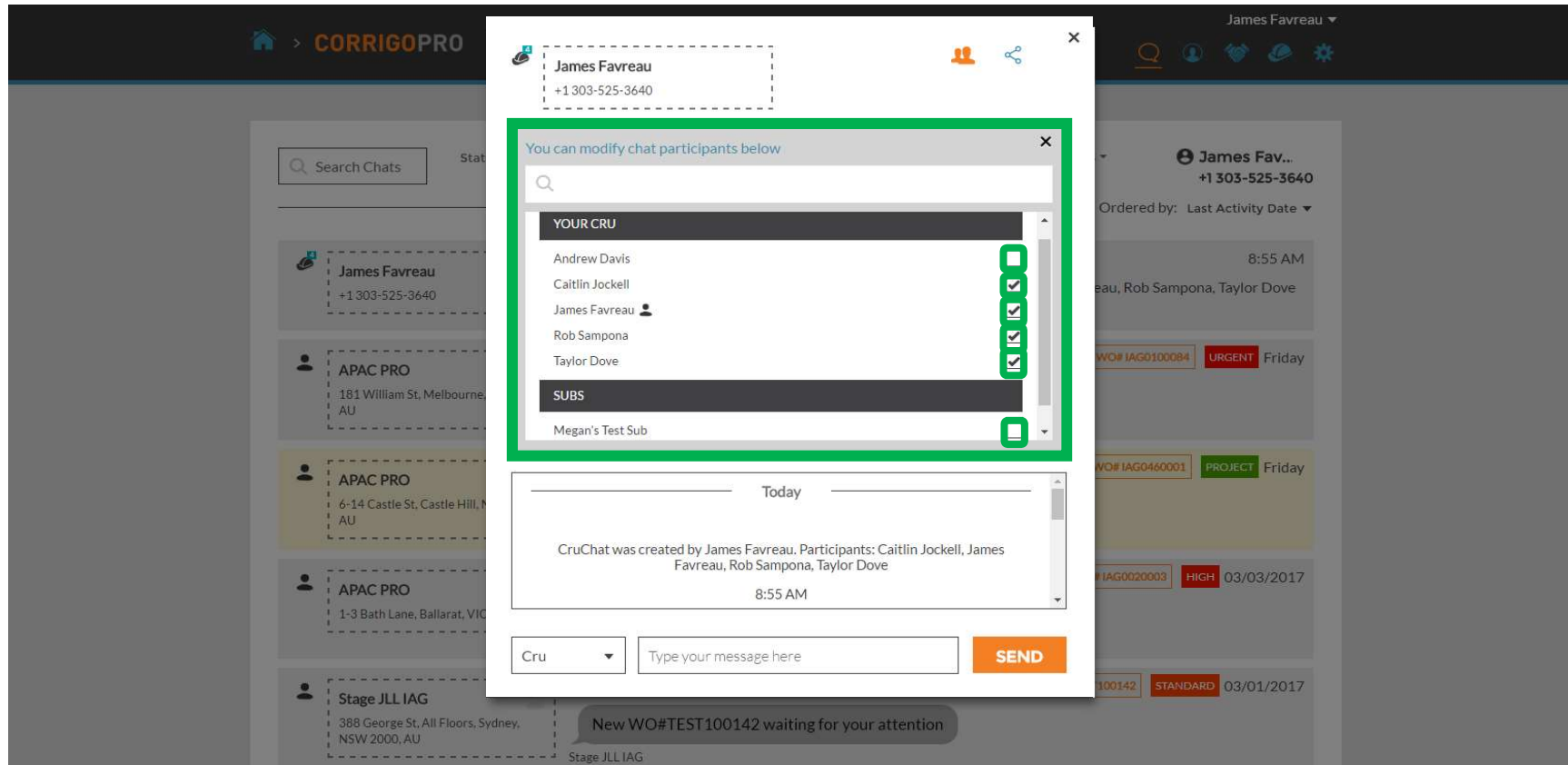
Adding and Removing CruChat Participants

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

The screenshot displays the Corrigopro interface. At the top, there is a navigation bar with a home icon, the text 'CORRIGOPRO', and a user profile for 'James Favreau'. Below this is a search bar labeled 'Search Chats' and filter options for 'Status: Any', 'WO State: Any', and 'Complete By: Any'. A 'MORE...' dropdown and a user profile for 'James Favreau' with phone number '+1 303-525-3640' are also visible. The main content area shows a list of CruChats, each with a customer profile, a message, and associated work order details. The second chat is highlighted with a green border, and the third with a yellow border. The fourth and fifth chats have orange boxes around their work order numbers and priority levels.

| Customer | Message | Work Order Number | Priority | Date |
|--|--|-------------------|----------|------------|
| James Favreau +1 303-525-3640 | Received. | | | 9:29 AM |
| APAC PRO 181 William St, Melbourne, VIC 3000, AU | New WO#IAG0100084 waiting for your attention | WO# IAG0100084 | URGENT | Friday |
| APAC PRO 6-14 Castle St, Castle Hill, NSW 1765, AU | New WO#IAG0460001 waiting for your attention | WO# IAG0460001 | PROJECT | Friday |
| APAC PRO 1-3 Bath Lane, Ballarat, VIC 3350, AU | New WO#IAG0020003 waiting for your attention | WO# IAG0020003 | HIGH | 03/03/2017 |
| Stage JLL IAG 388 George St, All Floors, Sydney, NSW 2000, AU | New WO#TEST100142 waiting for your attention | WO#TEST100142 | STANDARD | 03/01/2017 |

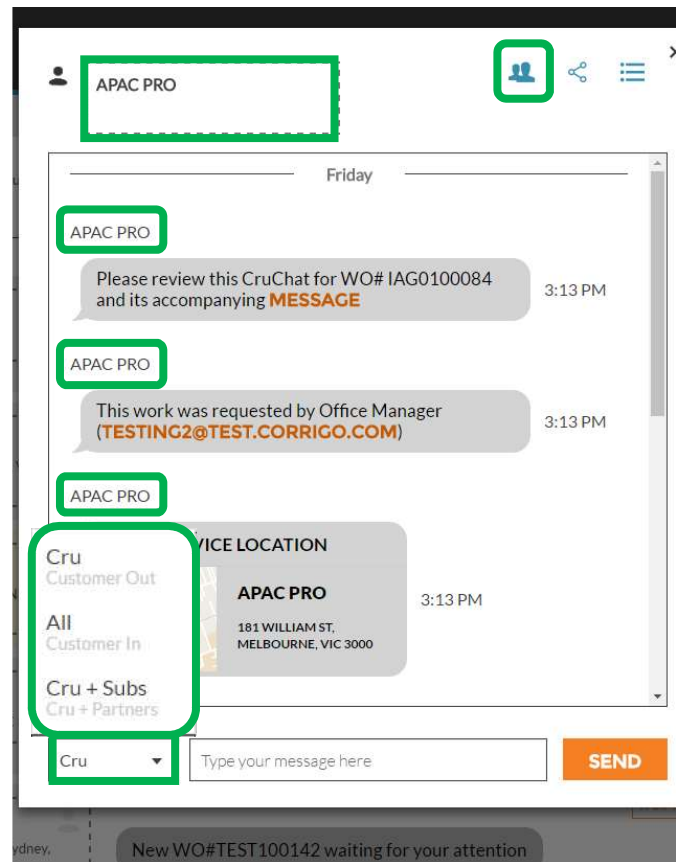
A CruChat with a work order associated with it will have an orange box with the work order number, and a color coded box with the priority level indicated

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

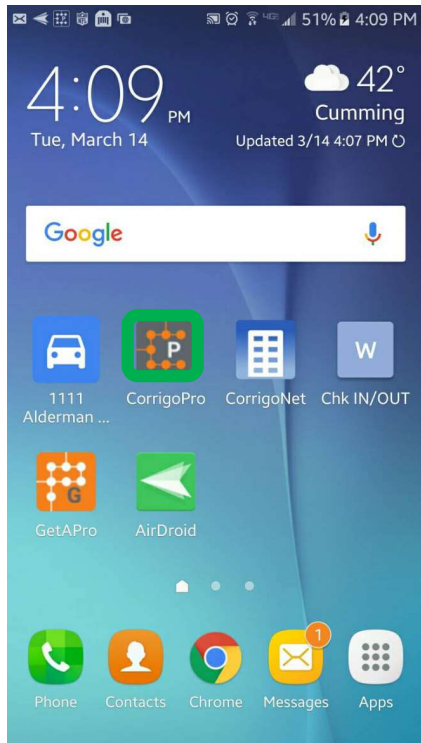
Cru - Cru Only

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

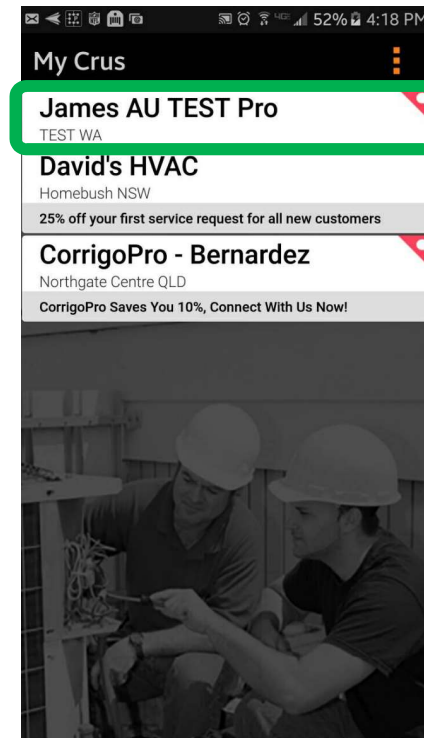


Install CorrigoPro mobile app

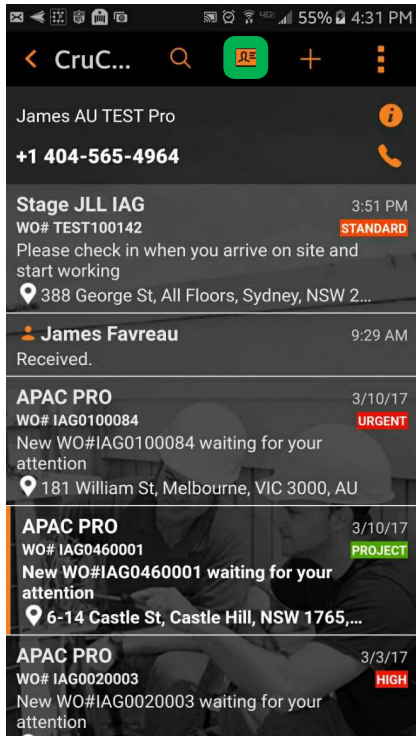
Tap to open the app

Your Crus will appear on the first screen.

Tap on a Cru to access the related CruChats and options.

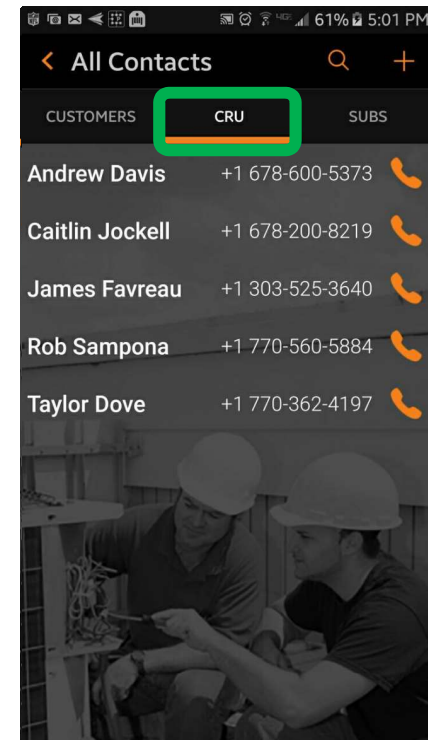


CorrigoPro Mobile App: CruChats

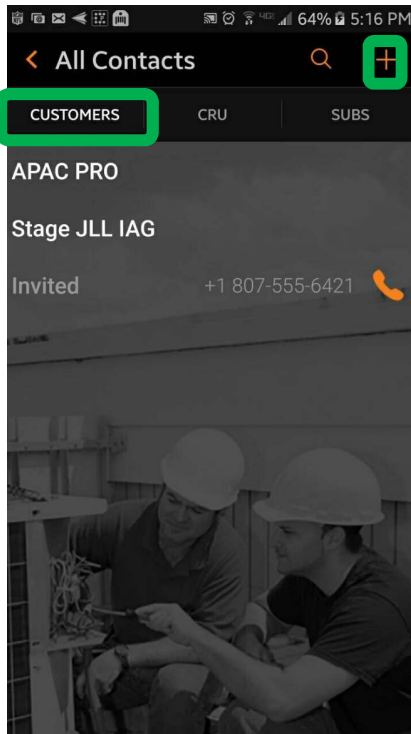


To invite someone to connect, tap on the orange business card icon

This will bring up all of your contacts including your customers/Subs/Cru



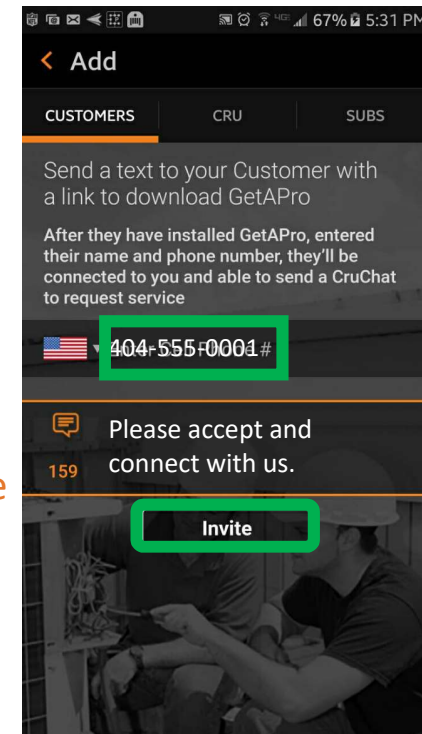
CorrigoPro Mobile App: Invite A Customer



To invite a customer to connect, tap on the “CUSTOMERS” tab in

Then tap on the orange *plus* symbol

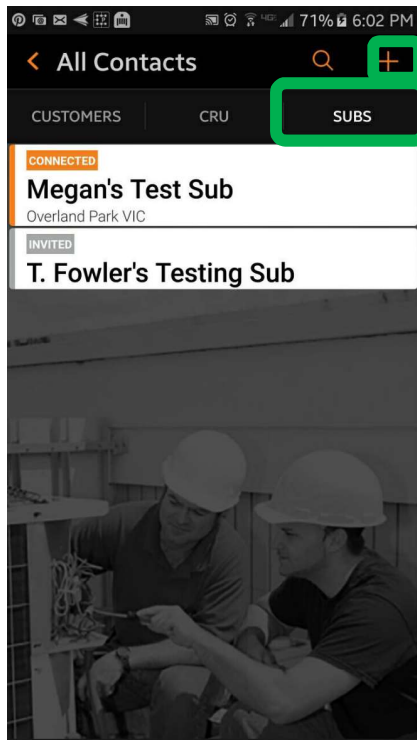
Enter your customer’s mobile phone number, add a brief message, and tap “Invite”



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)



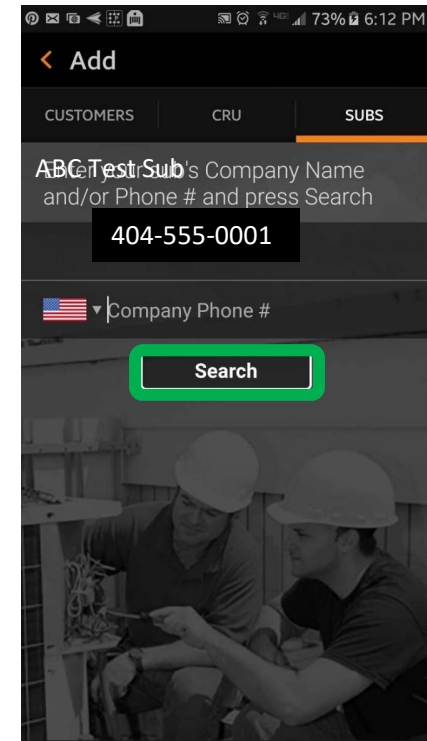
To invite a sub to connect tap on the “SUBS” tab in your contacts list.

Then tap on the orange *plus* symbol

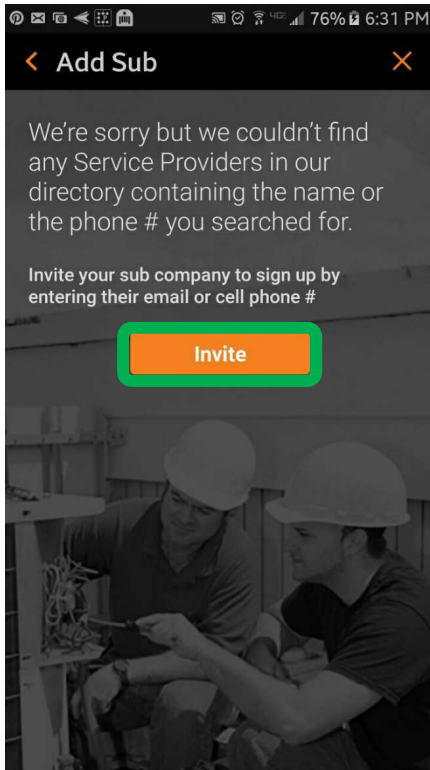
Enter your sub’s company name, and phone number, then tap “Search”

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)



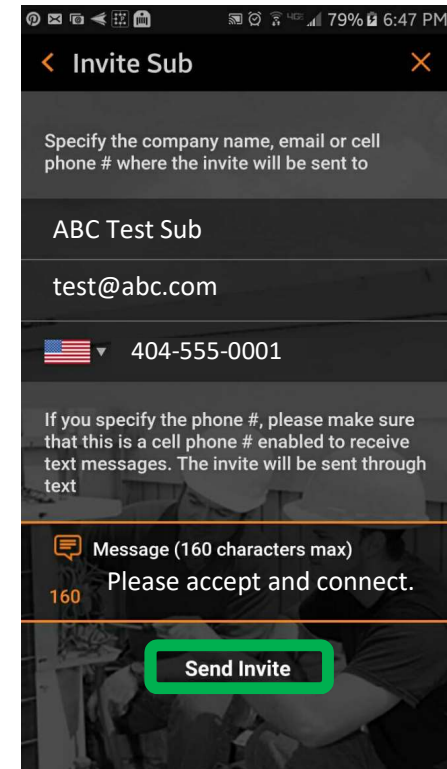
If the sub does not appear in the system, tap on “Invite”

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

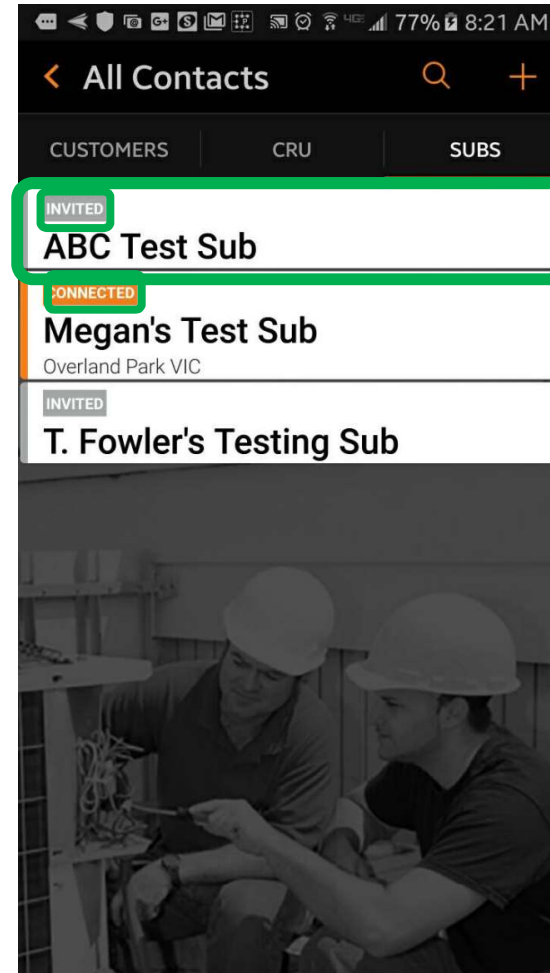
Tap “Send Invite”



CorrigoPro Mobile App: Invite A Subcontractor (Sub)

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

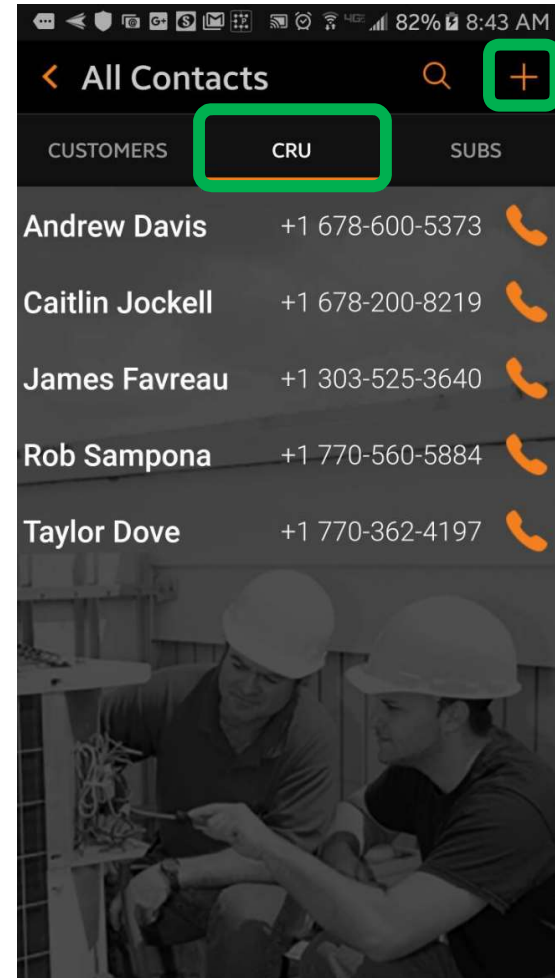
Once your sub accepts the invitation and downloads the CorrigoPro Mobile App, their status will change to “CONNECTED”



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

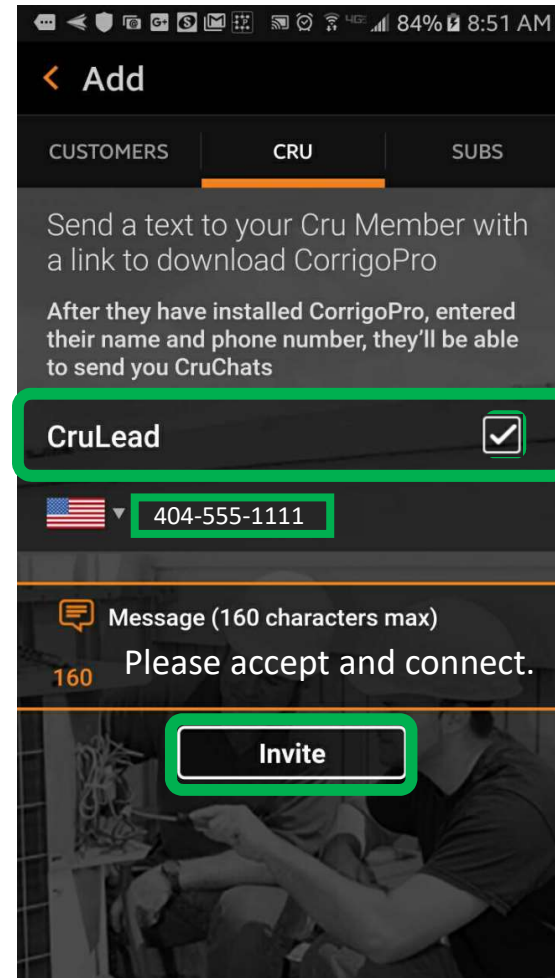
You may invite your new user as a CruMember or as a CruLead

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, CruLeads are technicians or field personnel that only need to be included in specific conversations

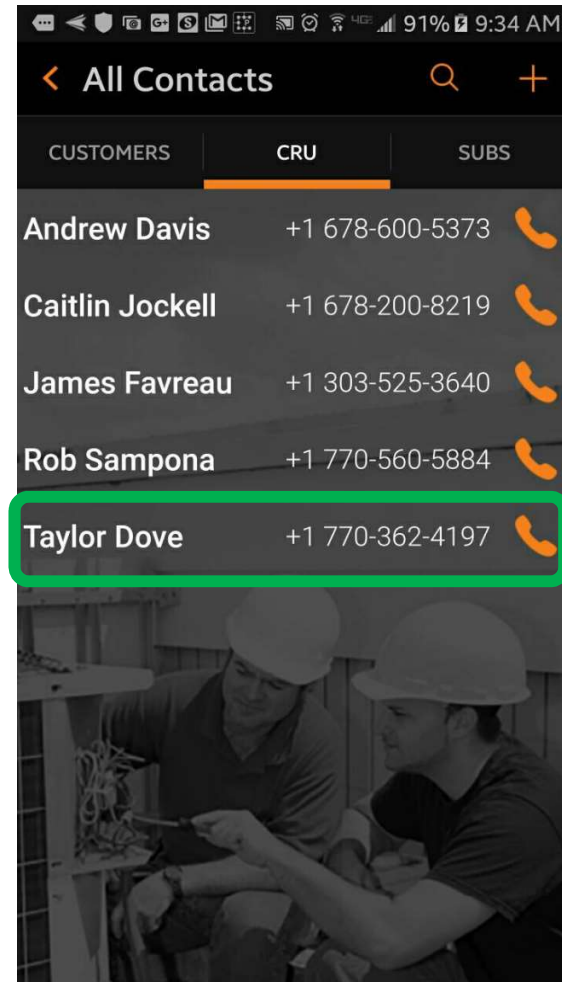
To designate the invitee as a CruLead, tap the checkbox in the CruLead section

Tap "Invite"

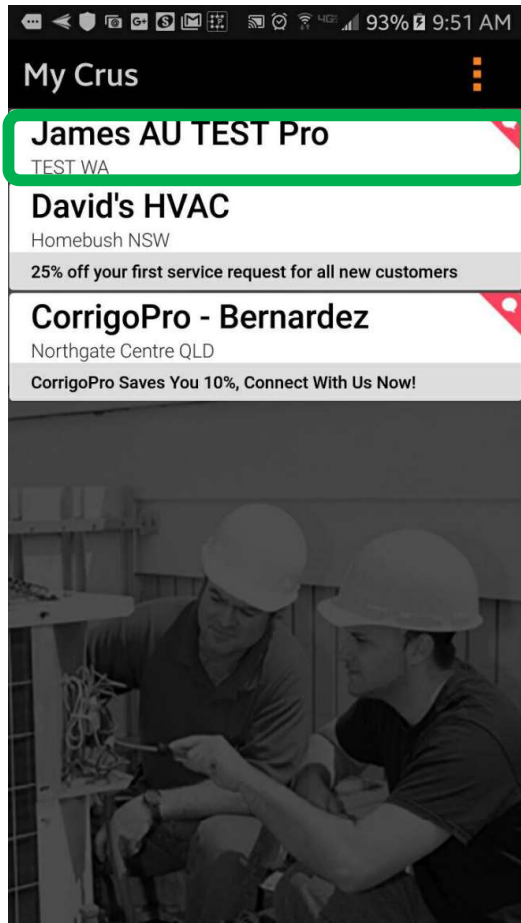


CorrigoPro Mobile App: Invite CruMembers / CruLeads

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

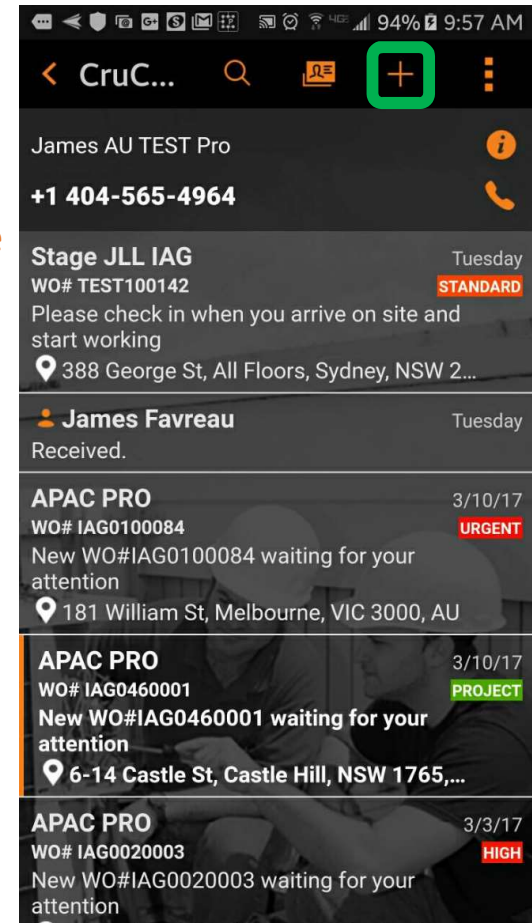


CorrigoPro Mobile App: Start a CruChat



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

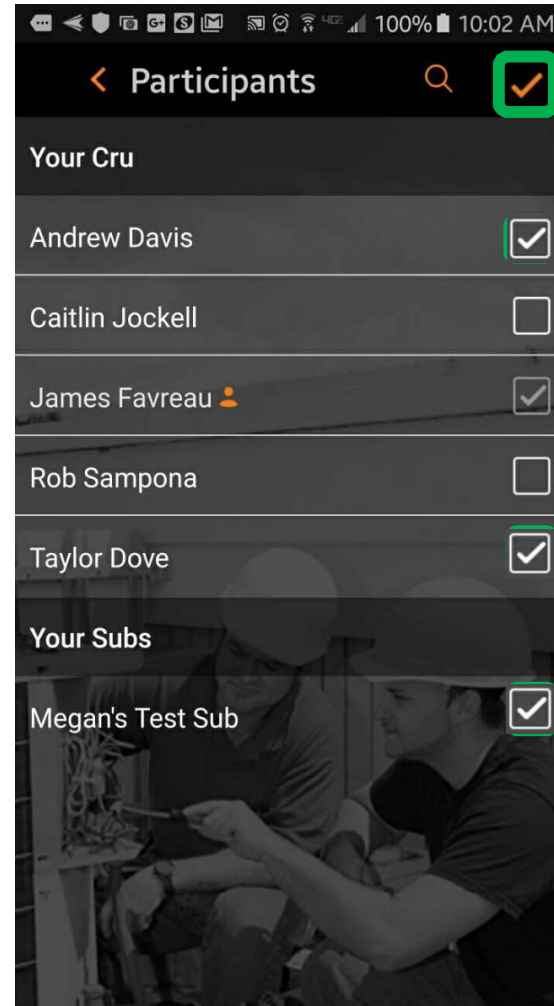


CorrigoPro Mobile App: Start a CruChat

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)



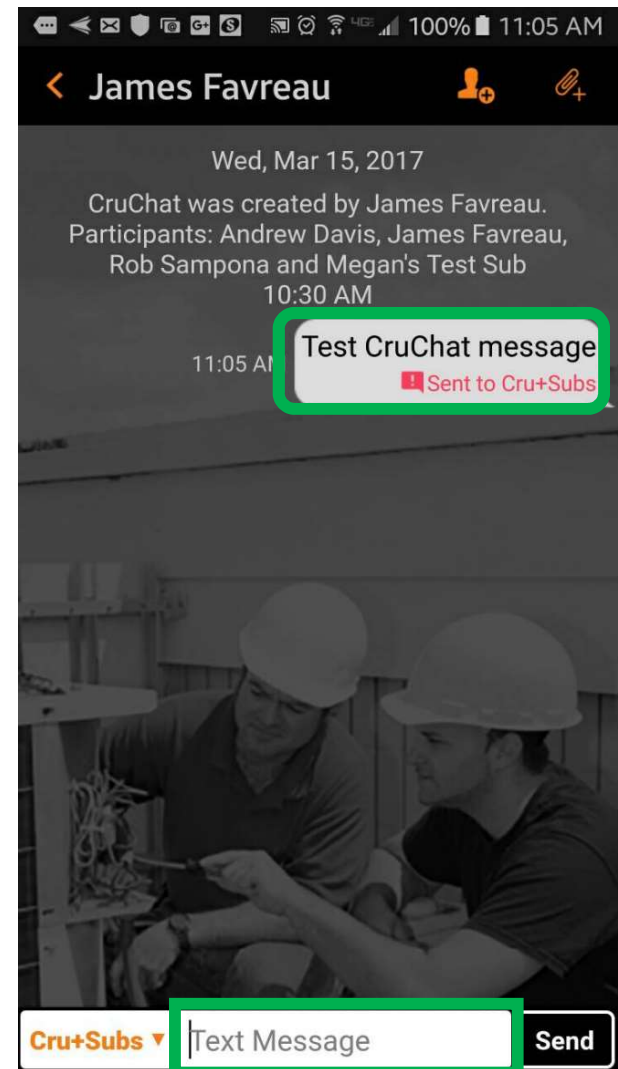
CorrigoPro Mobile App: Start a CruChat

Now that your CruChat has been created, tap the menu to the left of the text message box to select your participant groups

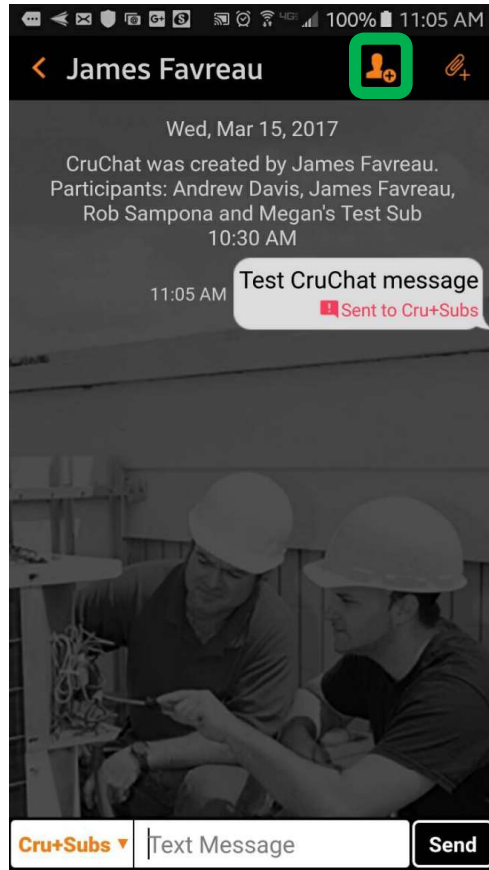
Select "Cru+Subs" or "Cru"

Enter in your message and tap "Send"

Each text bubble will show you who received the chat message



CorrigoPro Mobile: Add/Remove CruChat Participants



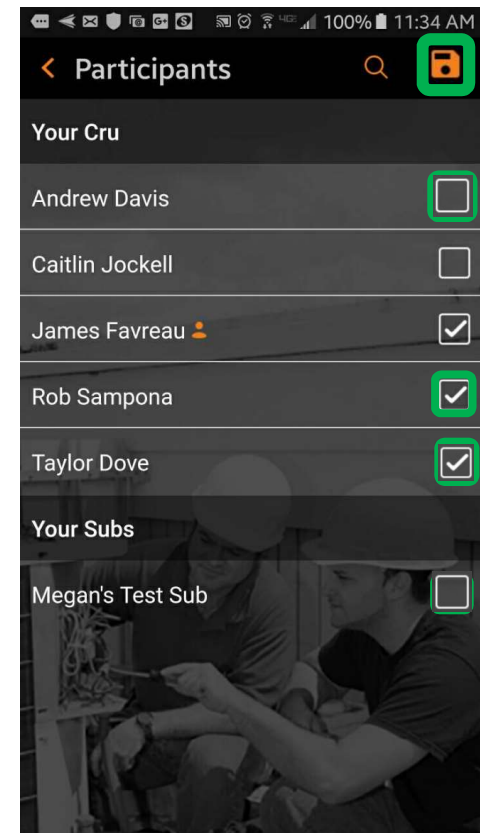
To add or remove participants of your CruChat, tap on the silhouette icon in the upper right

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://corrigo.com/contactus/>