



CORRIGOPRO

Connecting with CorrigoPro

Managing Tiles and Creating Connections

During this tutorial we will cover...

- Logging into CorrigoPro Desktop
- The Company Profile tile
- Creating your free ad (promo)
- Editing your services
- Smart Zones
- The Membership tile
- The CorrigoPro tile
- Settings and email notifications
- Our Cru
- CruMembers and CruLeads
- Our Subs
- Our Customers
- CruChats

Log into Your CorrigoPro Desktop

CorrigoPro Desktop login page URL- <https://login.corrigo.com/connect/login>

CORRIGOPRO
DESKTOP

James Favreau ▾

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

EMAIL test@Corrigo.com

PASSWORD ●●●●●●

REMEMBER ME

LOGIN

[FORGOT YOUR PASSWORD?](#)

Click "LOGIN"

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Your CorrigoPro Desktop

Logging in, you will arrive at the CorrigoPro Desktop

The dashboard features several key tiles:

- Updates:** A top-left orange tile with the text "Check out the latest updates from CorrigoPro" and a "Learn More" button. It lists features like accepting/rejecting work orders via email and capturing signatures on mobile devices.
- Work Order Summary:** A top-right white tile with the CorrigoPro logo and a table of metrics: WOs Awaiting Acceptance (43), WOs Overdue (78), Open Reactive WOs (36), Open PM/RM WOs (0), and Waiting for WO Completion Det... (0). Below is a pie chart titled "WOs BY STATUS (LAST 90 DAYS)" with a legend: Waiting for Acceptance (yellow), Open (orange), Open: In Progress (red), and Completed (green).
- User Profile:** A middle-left white tile showing the CorrigoPro logo, the name "David's HVAC", and a congratulatory message: "CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE".
- Billing:** A middle-right orange tile with a wallet icon and the text "MY CORRIGO BILLING ACCOUNT".
- Invoices:** A bottom-middle white tile with a blue header "YOUR INVOICES NEED ATTENTION" and three categories: "ready to be invoiced WOs" (31), "draft invoices" (27), and "disputed invoices" (0).
- Score and Connections:** A bottom-right white tile showing a "76 your average score" and "2 customers are connected to you".

Each of the tiles, when clicked on, will bring you to a specific section of the CorrigoPro Desktop

Invoice tile only displayed for "ADMIN" users

The Company Profile Tile

The screenshot displays the Corrigopro Company Profile Tile interface, which is divided into several sections:

- Top Left (Orange background):** Promotional text: "Check out the latest updates from Corrigopro". A "Learn More" button is present. A list of features includes: "Accept/reject work orders via email", "Capture customer signatures on your mobile device", and "Plus, so much more".
- Top Right (White background):** Header with the Corrigopro logo and an information icon. A summary table shows: "WOs Awaiting Acceptance" (43), "WOs Overdue" (78), "Open Reactive WOs" (36), "Open PM/RM WOs" (0), and "Waiting for WO Completion Det..." (0). Below this is a section titled "WOs BY STATUS (LAST 90 DAYS)" with a pie chart showing 5 Completed (green), 2 Open (yellow), and 1 Open: In Progress (orange) work orders.
- Middle Left (White background, green border):** Features the Corrigopro logo and the name "David's HVAC". A message states: "CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE".
- Middle Right (Orange background):** A circular icon representing a folder, with the text "MY CORRIGO BILLING ACCOUNT".
- Bottom Left (Blue background):** A graduation cap icon, indicating a section related to training or education.
- Bottom Middle (White background):** A section titled "YOUR INVOICES NEED ATTENTION" with three metrics: "31 ready to be invoiced WOs", "27 draft invoices", and "0 disputed invoices".
- Bottom Right (Blue background):** A section showing "76 your average score" and "2 customers are connected to you".

Let's look at the Company Profile tile

Click on the tile to access your Company Profile Profile

Managing Your Company Profile

Here you will be able to add a company logo and change your company name

Click on “EDIT” in the Business Overview section to enter details of the services your company provides

To enter or edit your physical location and contact information, click on “EDIT BRANCH INFO”

The screenshot shows the user interface for managing a company profile. At the top, the logo for CORRIGOPRO is displayed next to the text "Canada Test Pro". Below the logo, there are two buttons: "CHANGE COMPANY LOGO" and "CHANGE COMPANY NAME".

The "Business Overview" section is highlighted with a green box around the "EDIT" button. Below this, there is a description: "Multi-service provider. Going above and beyond to address any and all of our customers' needs." Underneath, the "TAXPAYER IDENTIFICATION NUMBER (TIN)" is listed as "*****255" with an "EDIT" button. A link "WHAT IS A TIN NUMBER" is also present.

The "Branches" section is also highlighted with a green box around the "EDIT BRANCH INFO" button. Below this, there is a list of fields: "PROMO" (with a link "CREATE YOUR FREE AD"), "PHONE", "EMAIL", "FAX", "WEB SITE", "ADDRESS", "SERVICES" (with "Electrical" and an "EDIT" button), and "SMART ZONES" (with "Western Australia" and an "EDIT" button").

At the bottom of the page, there is a link "HOW DO I ADD ANOTHER BRANCH?".

Managing Your Company Profile

Here, you can edit your company phone number, email, website, and physical address details

These details will be visible to your connected customers, and this email will be listed as your general email for each of these customers

Edit Branch Info

x

NAME	Canada Test Pro
PHONE	<input type="text" value="450-555-0123"/>
EMAIL	<input type="text" value="test@Corrigo.com"/>
FAX	<input type="text"/>
WEB SITE	<input type="text" value="www.companywebsite.com"/>
STREET	<input type="text" value="123 West Maple St. Suite 100"/>
STREET 2	<input type="text"/>
CITY	<input type="text" value="Montreal"/>
COUNTRY ?	Australia
STATE	<input type="text" value="Quebec"/>
POSTAL CODE	<input type="text" value="H1A 5C2"/>

Click "SAVE"

CANCEL

SAVE

PROMO / Create Your Free Ad

By clicking on the “CREATE YOUR FREE AD” link, the Create Promo window will appear

Create Promo

15% off all first-time service calls and products.

0 of 71 characters

CANCEL SAVE

Branches

[EDIT BRANCH INFO](#)

PROMO [CREATE YOUR FREE AD](#)

PHONE +1 404-565-4964

EMAIL jamesf@corrigo.com

FAX

WEB SITE

ADDRESS 123 TEST, TEST, WA, AU, 6006

SERVICES Electrical [EDIT](#)

SMART ZONES Western Australia [EDIT](#)

You may use up to 71 characters to display a promotional offer

Click “SAVE” to post your PROMO

You can return to your Company Profile page to update or remove your PROMO at any time

Editing Your Services



In the “SERVICES” section, select the specific service or services that your company provides

Your selections help current and potential clients find you in Corrigo

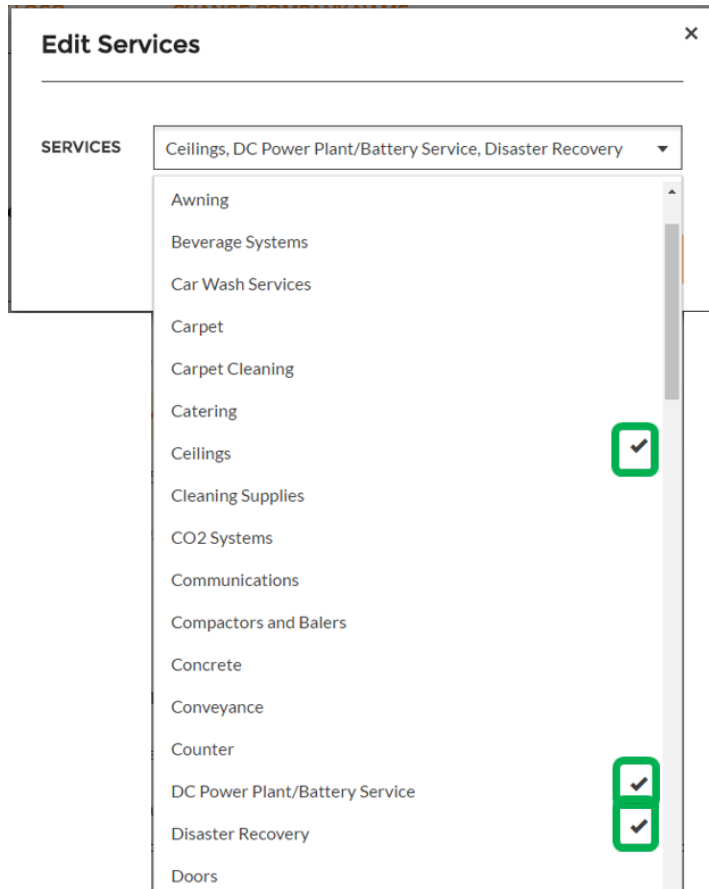
Click on the “EDIT” button and the Edit Services window will appear

Branches

EDIT BRANCH INFO

PROMO	CREATE YOUR FREE AD
PHONE	+1 450-555-0123
EMAIL	cap2nine@gmail.com
FAX	
WEB SITE	
ADDRESS	123 TEST, TEST, WA, AU, 6006
SERVICES	Disaster Recovery 
SMART ZONES	Western Australia 

Editing Your Services



Edit Services [X]

SERVICES Ceilings, DC Power Plant/Battery Service, Disaster Recovery [v]

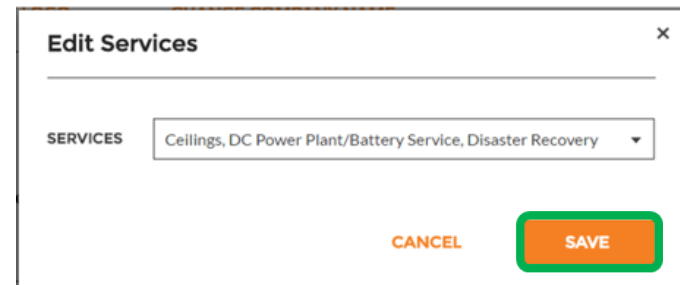
- Awning
- Beverage Systems
- Car Wash Services
- Carpet
- Carpet Cleaning
- Catering
- Ceilings
- Cleaning Supplies
- CO2 Systems
- Communications
- Compactors and Balers
- Concrete
- Conveyance
- Counter
- DC Power Plant/Battery Service
- Disaster Recovery
- Doors

Click on the drop down arrow in the “SERVICES” box to view all available services

Place a check to the right of the service you provide

Be sure to select only the services that your company provides as customers will use this information when searching for service providers on the CorrigoPro network

Once you have completed your company’s service selections, click “SAVE”



Edit Services [X]

SERVICES Ceilings, DC Power Plant/Battery Service, Disaster Recovery [v]

CANCEL **SAVE**

Select Your Smart Zones

Selecting the correct Smart Zone coverage will ensure your company is visible to customers searching for the services you provide, in the areas where needed

Smart Zones are pre-defined geographic areas

Please be sure to select the Smart Zones that match your area of service

To review and edit your Smart Zones, click on the “EDIT” button in the Smart Zones row

This will bring you to the Smart Zones information screen

Branches

[EDIT BRANCH INFO](#)

PROMO

[CREATE YOUR FREE AD](#)

PHONE

+1 404-565-4964

EMAIL

jamesf@corrigo.com

FAX

WEB SITE

ADDRESS

123 TEST, TEST, WA, AU, 6006

SERVICES

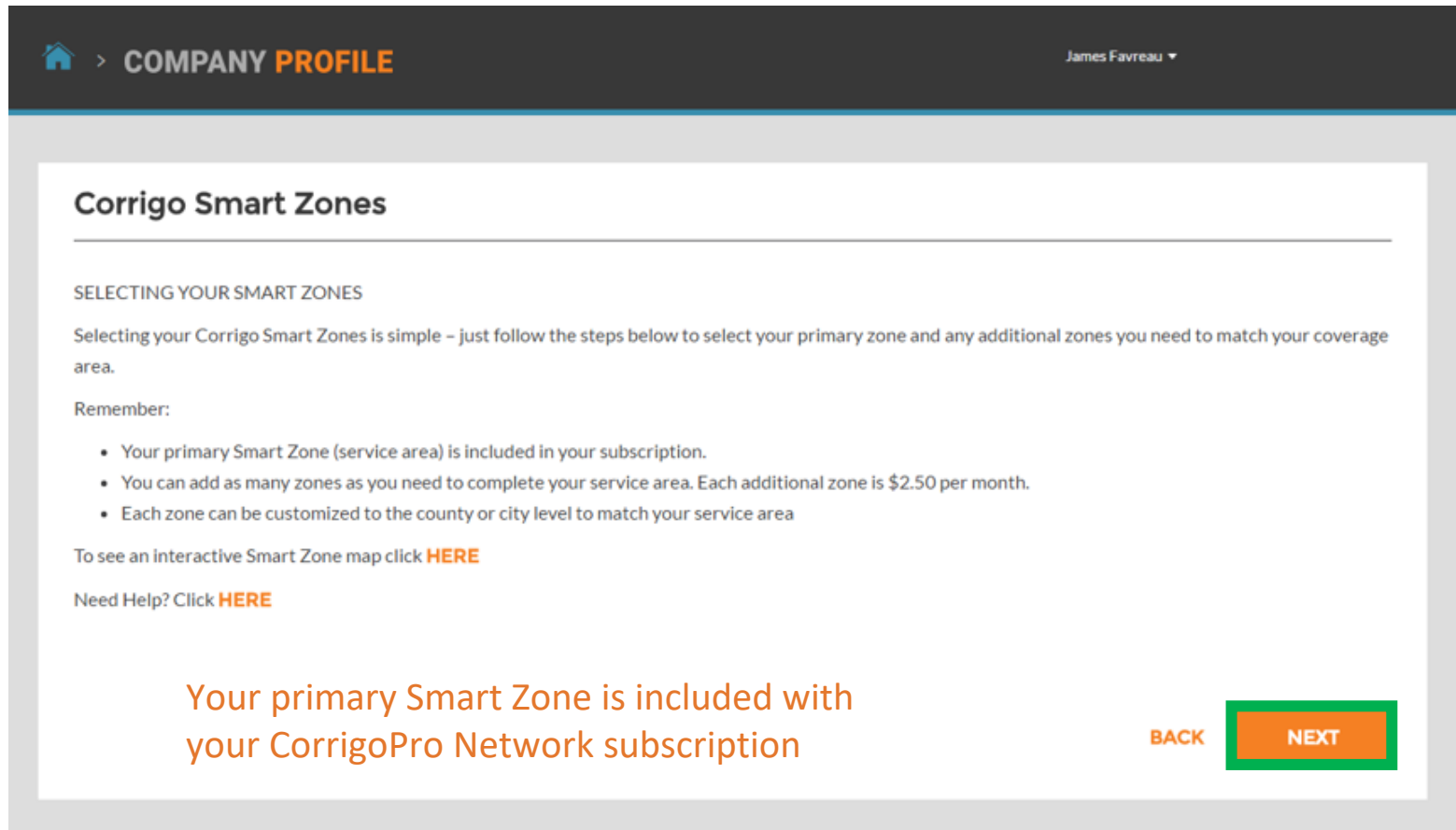
Electrical [EDIT](#)

SMART ZONES

Western Australia

[EDIT](#)

Select Your Smart Zones



The screenshot shows a web application interface for selecting smart zones. At the top, there is a dark navigation bar with a home icon, a breadcrumb '> COMPANY PROFILE', and a user name 'James Favreau' with a dropdown arrow. Below the navigation bar, the main content area has a white background with a light gray border. The title 'Corrigo Smart Zones' is displayed in bold black text, followed by a horizontal line. Underneath, the section 'SELECTING YOUR SMART ZONES' is introduced. A paragraph explains that selecting smart zones is simple and provides instructions. A 'Remember:' section lists three bullet points: the primary zone is included, additional zones cost \$2.50/month, and zones can be customized. Two links are provided: 'HERE' for an interactive map and 'HERE' for help. At the bottom, a large orange text block states that the primary zone is included with the subscription. To the right of this text are two buttons: a 'BACK' button and a 'NEXT' button, which is highlighted with a green border.

COMPANY PROFILE James Favreau

Corrigo Smart Zones

SELECTING YOUR SMART ZONES

Selecting your Corrigo Smart Zones is simple – just follow the steps below to select your primary zone and any additional zones you need to match your coverage area.

Remember:

- Your primary Smart Zone (service area) is included in your subscription.
- You can add as many zones as you need to complete your service area. Each additional zone is \$2.50 per month.
- Each zone can be customized to the county or city level to match your service area

To see an interactive Smart Zone map click [HERE](#)


Need Help? Click [HERE](#)

Your primary Smart Zone is included with your CorrigoPro Network subscription

BACK NEXT

Click “NEXT” to access the Smart Zones list

Select Your Smart Zones

 > **COMPANY PROFILE** James Favreau ▾

Set-Up Smart Zones

Country ?

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland
 - Aguathuna
 - Anchor Point
 - Aquaforte
 - Arnolds Cove
 - Aspen Cove
 - Avondale
 - Badger
 - Badgers Quay
 - Baie Verte

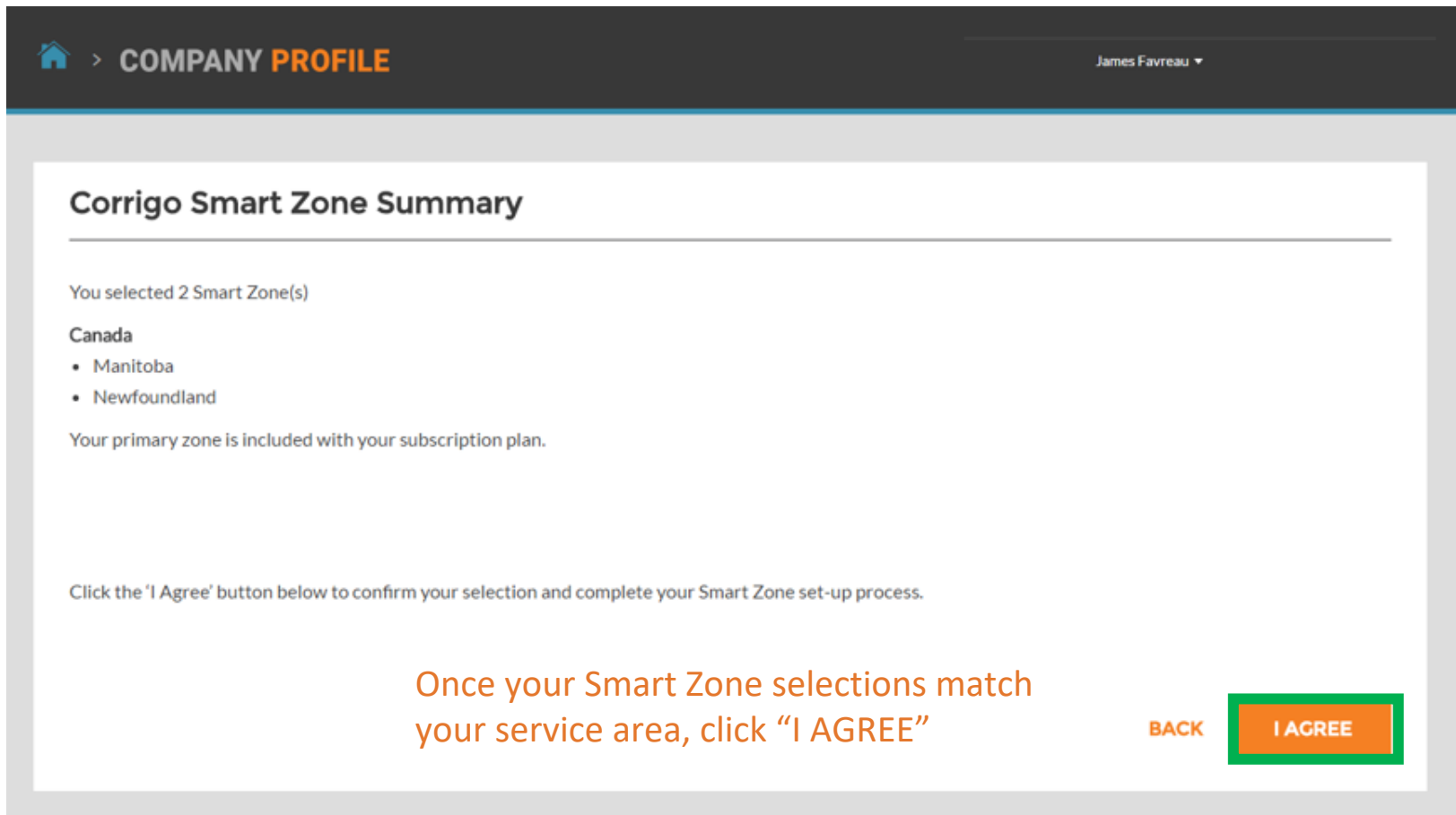
By clicking on the *plus* symbol to the left of any state, province or territory, you can drill down to specific cities and townships within the Smart Zone

Click the checkboxes beside all the areas in which you provide service

Click "NEXT" BACK NEXT

Select Your Smart Zones

You will be prompted to confirm your Smart Zone selections



The screenshot shows a web interface for a user profile. At the top, there is a dark header with a home icon and the text 'COMPANY PROFILE' on the left, and the user's name 'James Favreau' with a dropdown arrow on the right. Below the header, the main content area has a title 'Corrigo Smart Zone Summary' followed by a horizontal line. The text below the line states 'You selected 2 Smart Zone(s)' and lists 'Canada' with sub-items 'Manitoba' and 'Newfoundland'. A note says 'Your primary zone is included with your subscription plan.' At the bottom of the content area, there is a paragraph: 'Click the 'I Agree' button below to confirm your selection and complete your Smart Zone set-up process.' Below this text, there are two buttons: a 'BACK' button and an 'I AGREE' button. The 'I AGREE' button is highlighted with a green border.

COMPANY PROFILE James Favreau ▾

Corrigo Smart Zone Summary

You selected 2 Smart Zone(s)

Canada

- Manitoba
- Newfoundland

Your primary zone is included with your subscription plan.

Click the 'I Agree' button below to confirm your selection and complete your Smart Zone set-up process.

Once your Smart Zone selections match your service area, click "I AGREE"


BACK **I AGREE**

Returning To The CorrigoPro Desktop

With your Smart Zones selected, your Company Profile is now complete!

COMPANY PROFILE James Favreau

Company Profile

 Canada Test Pro

[CHANGE COMPANY LOGO](#) [CHANGE COMPANY NAME](#)

Business Overview [EDIT](#)

Multi-service provider. Going above and beyond to address any and all of our customers' needs.

TAXPAYER IDENTIFICATION NUMBER (TIN) *****255 [EDIT](#)

[WHAT IS A TIN NUMBER](#)

Branches [EDIT BRANCH INFO](#)

PROMO [CREATE YOUR FREE AD](#)

PHONE +1 404-565-4964

EMAIL jamesf@corrigo.com

FAX

You can return to the CorrigoPro Desktop, from any tile, by clicking on the blue “Home” icon at the top of the page

The Membership Tile

Within the Membership tile, you can view your membership details, update your payment method, and review or print your CorrigoPro monthly subscription statements

Check out the latest updates from Corrigopro

- Accept/reject work orders via email
- Capture customer signatures on your mobile device
- Plus, so much more

[Learn More](#)

CORRIGOPRO

David's HVAC

CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

MY CORRIGO BILLING ACCOUNT

WOs BY STATUS (LAST 90 DAYS)

WOs Awaiting Acceptance	▲	43
WOs Overdue	▲	78
Open Reactive WOs		36
Open PM/RM WOs		0
Waiting for WO Completion Det...		0

Waiting for Acceptance: 2
Open: 1
Open: In Progress: 1
Completed: 5

YOUR INVOICES NEED ATTENTION

31	27	0
ready to be invoiced WOs	draft invoices	disputed invoices

76

your average score

2

customers are connected to you

The Membership Tile

The screenshot shows a web application interface for membership management. At the top, there is a dark navigation bar with a home icon (a house inside a square) on the left, the text 'MEMBERSHIP DETAILS' in the center, and the user's name 'James Favreau' on the right. Below the navigation bar, the main content area is titled 'Company Membership Details'. On the left side of this area, there is a circular icon with a chain link and the word 'STANDARD' underneath it. To the right of the icon is a table with three rows of membership details. Each row has a label, a value, and an action button. The first row is 'MEMBERSHIP LEVEL' with the value 'Standard' and a 'VIEW / CHANGE' button. The second row is 'PAYMENT METHOD' with the value 'Credit Card' and a 'VIEW / CHANGE' button. The third row is 'EMAIL MY INVOICES' with the value 'Yes' and a 'CHANGE' button. Below the table, there is a section titled 'Billing History (last 12 months)'. It contains a table with three columns: 'DATE', 'AMOUNT', and 'ACTION'. The table is currently empty, and the text 'No billing history to display' is centered below the table headers.

MEMBERSHIP LEVEL	Standard	VIEW / CHANGE
PAYMENT METHOD	Credit Card	VIEW / CHANGE
EMAIL MY INVOICES	Yes	CHANGE

Billing History (last 12 months)

DATE	AMOUNT	ACTION
No billing history to display		

Click on the corresponding link to review or update your membership level, payment method details, and membership invoice email preferences

As always, the blue “Home” icon will return you to your CorrigoPro Desktop

The CorrigoPro Tile

To access the CorrigoPro portal from your desktop, click on the CorrigoPro tile

Check out the latest updates from CorrigoPro

- Accept/reject work orders via email
- Capture customer signatures on your mobile device
- Plus, so much more

[Learn More](#)

CORRIGOPRO | David's HVAC

CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

MY CORRIGO BILLING ACCOUNT

YOUR INVOICES NEED ATTENTION

31	27	0
ready to be invoiced WOs	draft invoices	disputed invoices

WOS BY STATUS (LAST 90 DAYS)

Waiting for Acceptance	2
Open	1
Open: In Progress	1
Completed	5

76
your average score

2
customers are connected to you

CORRIGOPRO

WOs Awaiting Acceptance	▲	43
WOs Overdue	▲	78
Open Reactive WOs		36
Open PM/RM WOs		0
Waiting for WO Completion Det...		0

Legend:
● Waiting for Acceptance (Yellow)
● Open (Orange)
● Open: In Progress (Light Green)
● Completed (Dark Green)

The CorrigoPro Tile Filters

Click on the desired filter to view work order in a specific status in your desk top portal

Check out the latest updates from CorrigoPro

- Accept/reject work orders via email
- Capture customer signatures on your mobile device
- Plus, so much more

[Learn More](#)

CORRIGOPRO

WOs Awaiting Acceptance	▲	43
WOs Overdue	▲	78
Open Reactive WOs		36
Open PM/RM WOs		0
Waiting for WO Completion Det...		0

WOs BY STATUS (LAST 90 DAYS)

Status	Count
Completed	5
Open	2
Open: In Progress	1
Waiting for Acceptance	1

Legend:
● Waiting for Acceptance (Yellow)
● Open (Orange)
● Open: In Progress (Red)
● Completed (Green)

David's HVAC

CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

MY CORRIGO BILLING ACCOUNT

YOUR INVOICES NEED ATTENTION

Category	Count
ready to be invoiced WOs	31
draft invoices	27
disputed invoices	0

76
your average score

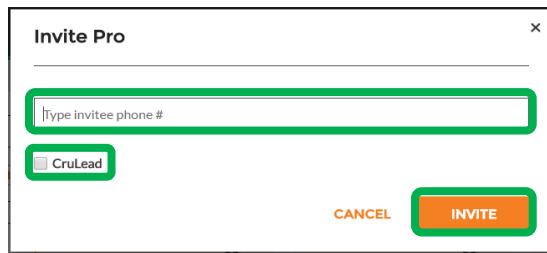
2
customers are connected to you

Our Cru

From the Our Cru page you will see all of your invited and connected internal employees

To invite a new CruMember click on the large, white box with the *plus* symbol

The “Invite Pro” window will appear



Invite Pro

Type invitee phone #

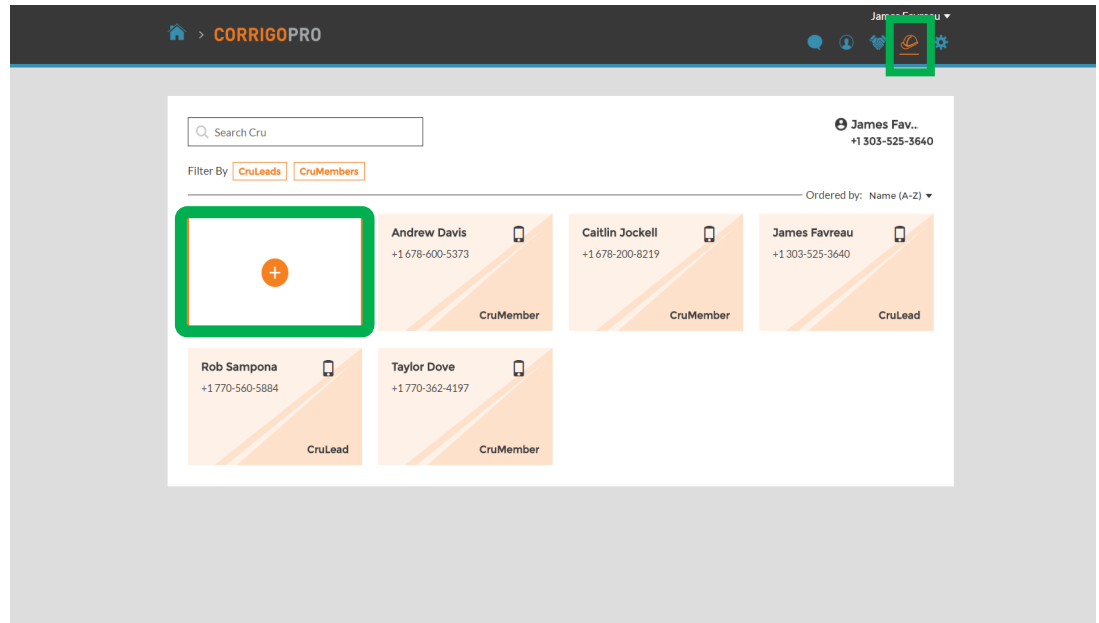
CruLead

CANCEL INVITE

Enter the employee’s mobile phone number

Click “INVITE”

By default, the invitee will be invited as a “CruMember”, however, you may select to invite them as a “CruLead”



Home > CORRIGOPRO

James Favreau +1 303-525-3640

Search Cru

Filter By CruLeads CruMembers

Ordered by: Name (A-Z)

Andrew Davis +1 678-600-5373 CruMember

Caitlin Jockell +1 678-200-8219 CruMember

James Favreau +1 303-525-3640 CruLead

Rob Sampona +1 770-560-5884 CruLead

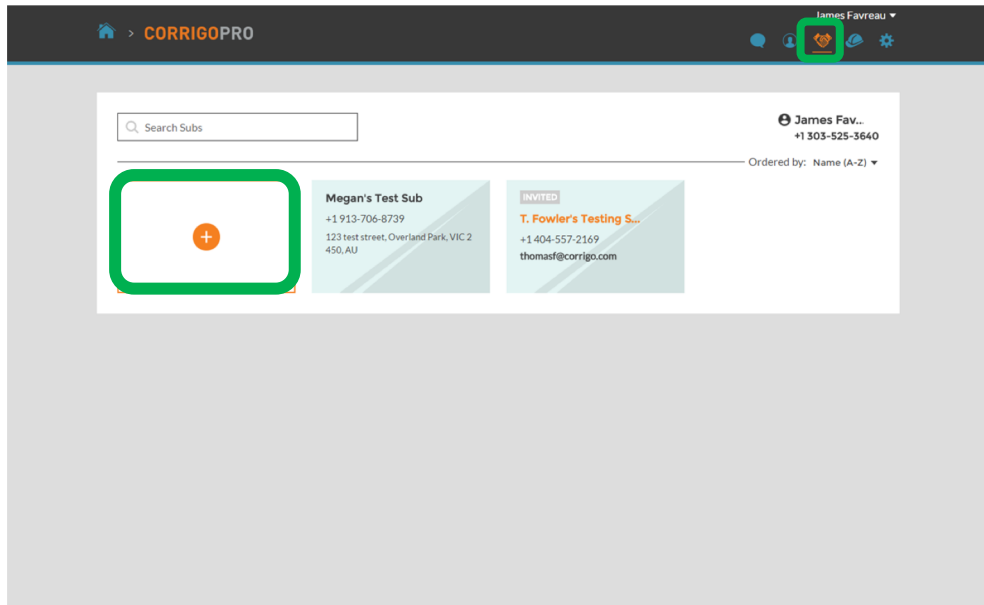
Taylor Dove +1 770-362-4197 CruMember

A CruLead, typically someone in a leadership or dispatch role, can see all CruChats

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

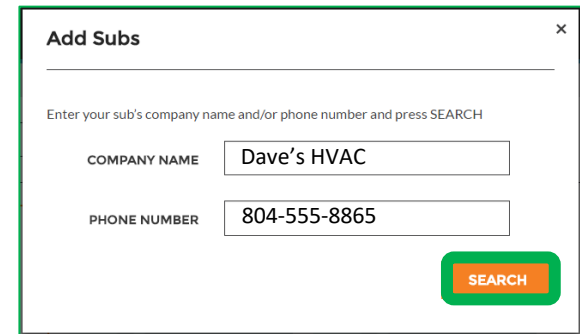
Our Subcontractors

By clicking on the “Our Subs” icon, represented by a handshake, you will see all of your invited and connected subcontractors or partner businesses



To invite a new Sub, click on the large, white box with the orange **plus** symbol

This will bring up the “Add Subs” window



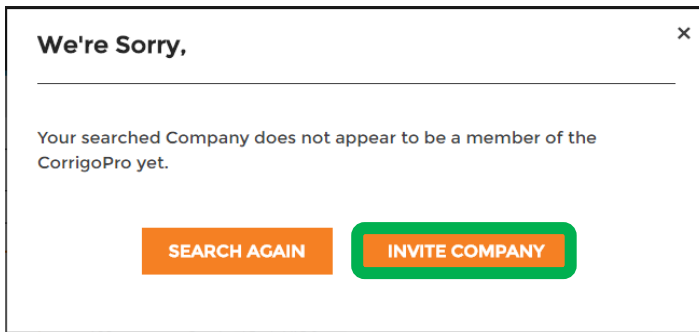
Enter the Sub's company name and mobile phone number

Then click “SEARCH”

This will initiate a search of the CorrigoPro system to see if your Sub is already connected to Corrigo

Our Subs: Inviting your subs

If your Sub's company is not found, then simply click "INVITE COMPANY"



We're Sorry, ×

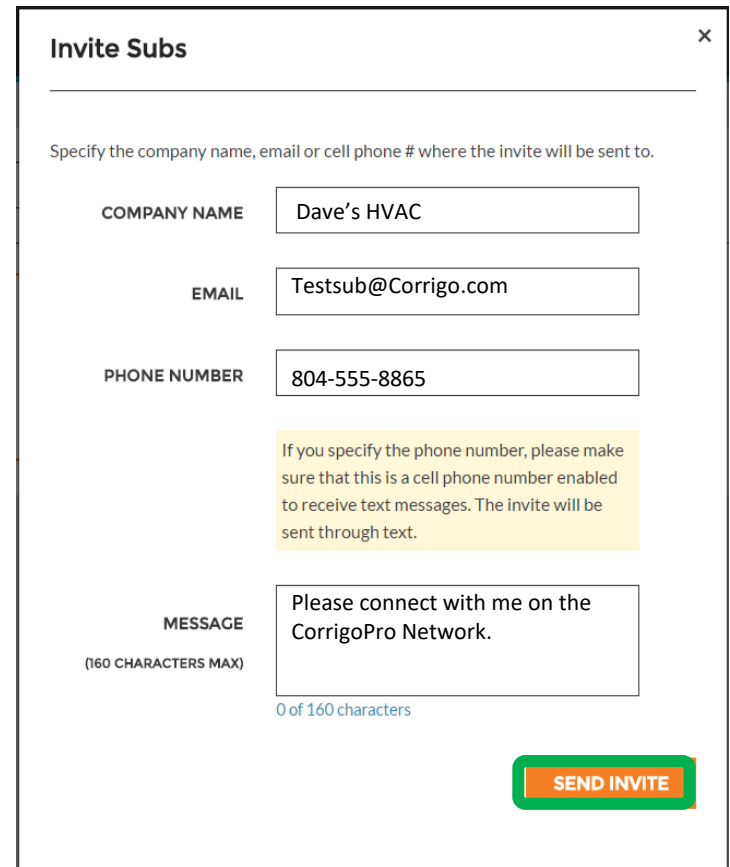
Your searched Company does not appear to be a member of the CorrigoPro yet.

SEARCH AGAIN **INVITE COMPANY**

Enter the Sub's company name, email address and mobile phone number

You may send a personalized message to your Sub or send the invite with no message
Click "SEND INVITE" to invite your Sub

The "Invite Subs" window will appear



Invite Subs ×

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

COMPANY NAME

EMAIL

PHONE NUMBER

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

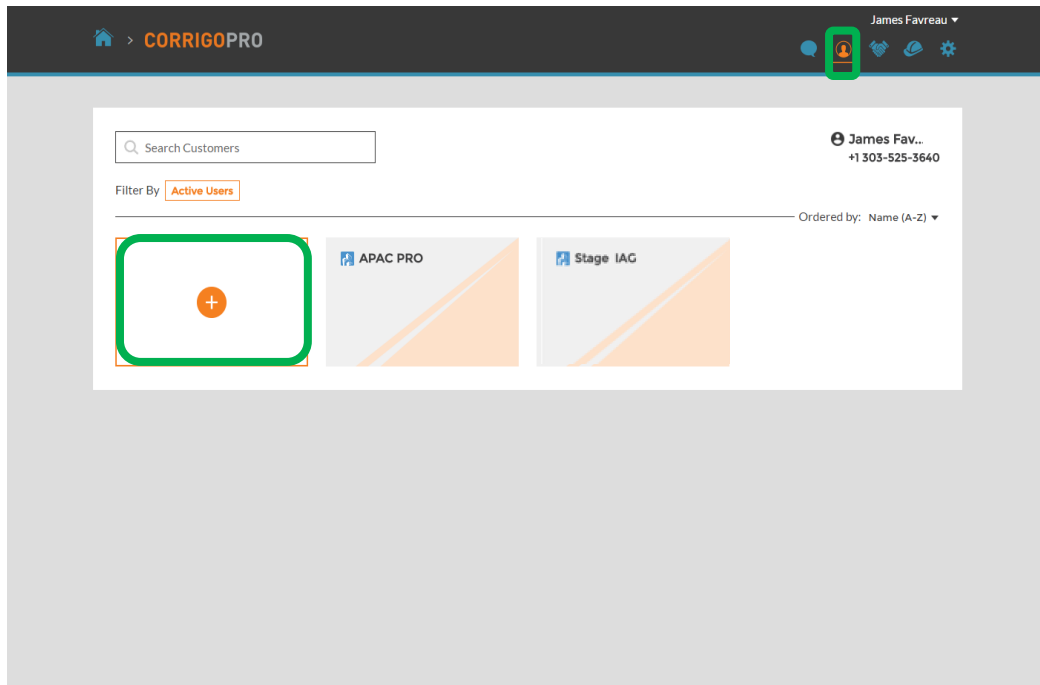
MESSAGE
(160 CHARACTERS MAX)

0 of 160 characters

SEND INVITE

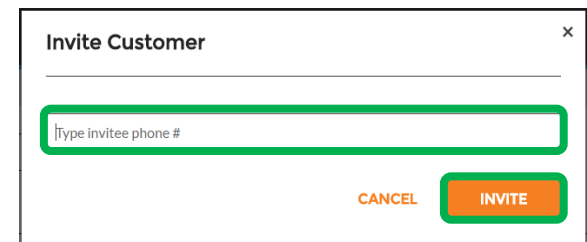
Our Customers

The next icon is a circle with a silhouette, clicking here will bring you to your “Our Customers” page where you can manage and view your invited and connected customers



To invite a non-Corrigo customer to connect, click on the large, white box with the orange *plus* symbol

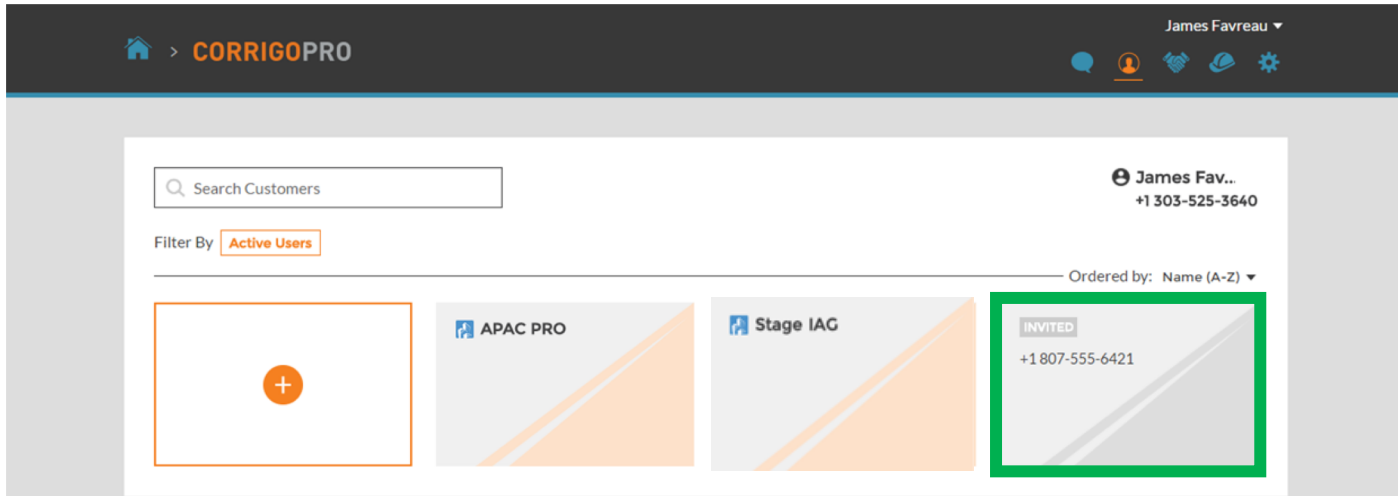
The “Invite Customer” window will appear

A screenshot of the 'Invite Customer' dialog box. The dialog has a title bar with 'Invite Customer' and a close button (X). Below the title bar is a text input field with the placeholder text 'Type invitee phone #'. At the bottom of the dialog are two buttons: 'CANCEL' and 'INVITE'.

Enter your customer’s mobile phone number and then click “INVITE”

Our Customers

Since CorrigoPro is designed to be used by anyone needing a service provider, you can invite all of your customers to connect with you



Once invited, your customer will receive a text message with instructions on connecting with you via mobile app

You will also see a new box appear on the Our Customers page with their information and “INVITED” as their status

CruChats

The last icon, which is represented by a speech bubble, is the “CruChats” icon

The screenshot displays the CruChats interface. At the top, there is a navigation bar with a home icon, the text 'CORRIGOPRO', and a user profile for 'James Favreau'. A search bar is located on the left, and a 'MORE...' dropdown menu is on the right. Below the search bar, there are filter options for 'Status: Any', 'WO State: Any', and 'Complete By: Any'. The main content area shows a list of chat items, each with a profile picture, name, address, and a message bubble. The items are: 1. APAC PRO (181 William St, Melbourne, VIC 3000, AU) with message 'New WO#IAG0100084 waiting for your attention', priority 'URGENT', and date 'Friday'. 2. APAC PRO (6-14 Castle St, Castle Hill, NSW 1765, AU) with message 'New WO#IAG0460001 waiting for your attention', priority 'PROJECT', and date 'Friday'. 3. APAC PRO (1-3 Bath Lane, Ballarat, VIC 3350, AU) with message 'New WO#IAG0020003 waiting for your attention', priority 'HIGH', and date '03/03/2017'. 4. Stage IAG (388 George St, All Floors, Sydney, NSW 2000, AU) with message 'New WO#TEST100142 waiting for your attention', priority 'STANDARD', and date '03/01/2017'. A 'CruChats' icon (a speech bubble) is highlighted in the top right corner of the interface.

Using the search and filter options from your CruChats page, you can review, filter, and access all of your CruChats and work orders

Congratulations!

You can now navigate and manage all of the tiles in the CorrigoPro Desktop portal

Check out the latest updates from CorrigoPro

- Accept/reject work orders via email
- Capture customer signatures on your mobile device
- Plus, so much more

[Learn More](#)

CORRIGOPRO | David's HVAC

CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

MY CORRIGO BILLING ACCOUNT

YOUR INVOICES NEED ATTENTION

31	27	0
ready to be invoiced WOs	draft invoices	disputed invoices

WOS BY STATUS (LAST 90 DAYS)

Waiting for Acceptance	2
Open	1
Open: In Progress	1
Completed	5

76
your average score

2
customers are connected to you

WOS Awaiting Acceptance 43
WOS Overdue 78

Open Reactive WOs: 36
Open PM/RM WOs: 0
Waiting for WO Completion Det...: 0

Questions

Contact Corrigo via phone or online:

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