



CORRIGOPRO

How to Get Paid:
Invoicing your Customers through CorrigoPro



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CorrigoPro Desktop Login

CORRIGOPRO
DESKTOP

✉

🇬🇧 ▼

davidw@corrigo.com

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REMEMBER ME

Type in your email address and password
to login to CorrigoPro

LOGIN

[FORGOT YOUR PASSWORD?](#)

CorrigoPro Invoicing Tile

Only ADMIN USERS will be able to see and access the Invoicing Tile

Click on the Invoicing tile to open the Invoicing App within CorrigoPro Desktop

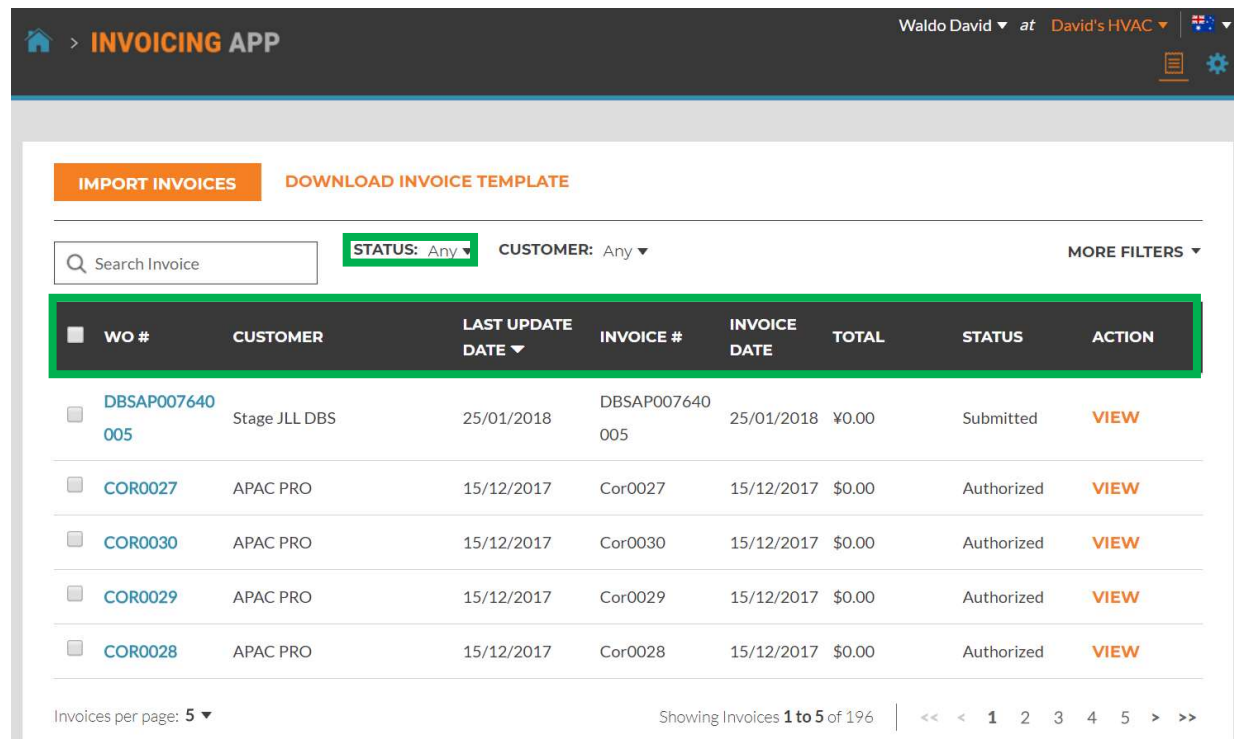
The screenshot displays the CorrigoPro Desktop interface. At the top, the user is identified as 'Waldo David' at 'David's HVAC'. The main dashboard features several tiles:

- Alert Tile:** A dark grey tile with the CorrigoPro logo and the text: "ALERT: EVERY JLL WORK ORDER REQUIRES CHECK IN AND CHECK OUT". A link below reads "Learn about adding your team to CorrigoPro".
- Unread Messages:** A white tile on the right showing two messages from 'APAC PRO' dated 11/01/2018 and 15/12/2017. It indicates "225 more unread messages...".
- Company Profile:** A white tile for 'David's HVAC' with the CorrigoPro logo and the message: "CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE".
- Invoicing Tile (Highlighted):** A white tile with a blue background and a green border. It contains the text "YOUR INVOICES NEED ATTENTION" and a summary of invoice status: 35 ready to be invoiced WOs, 24 draft invoices, and 1 disputed invoice.
- Average Score:** A white tile showing a score of 85 and "2 customers are connected to you".

Invoicing App

Data Fields

- WO#
- Customer
- Last date Updated
- Invoice #
- Invoice Date
- Total
- Status
- Action
- Search function allows you to search by WO# or Invoice#



The screenshot displays the Invoicing App interface. At the top, there is a navigation bar with a home icon, the text "INVOICING APP", and user information "Waldo David at David's HVAC". Below the navigation bar, there are two buttons: "IMPORT INVOICES" and "DOWNLOAD INVOICE TEMPLATE". A search bar labeled "Search Invoice" is present, along with filter dropdowns for "STATUS: Any" and "CUSTOMER: Any", and a "MORE FILTERS" dropdown. The main content area features a table with the following columns: WO #, CUSTOMER, LAST UPDATE DATE, INVOICE #, INVOICE DATE, TOTAL, STATUS, and ACTION. The table contains five rows of invoice data. At the bottom, there is a pagination control showing "Invoices per page: 5" and "Showing Invoices 1 to 5 of 196".

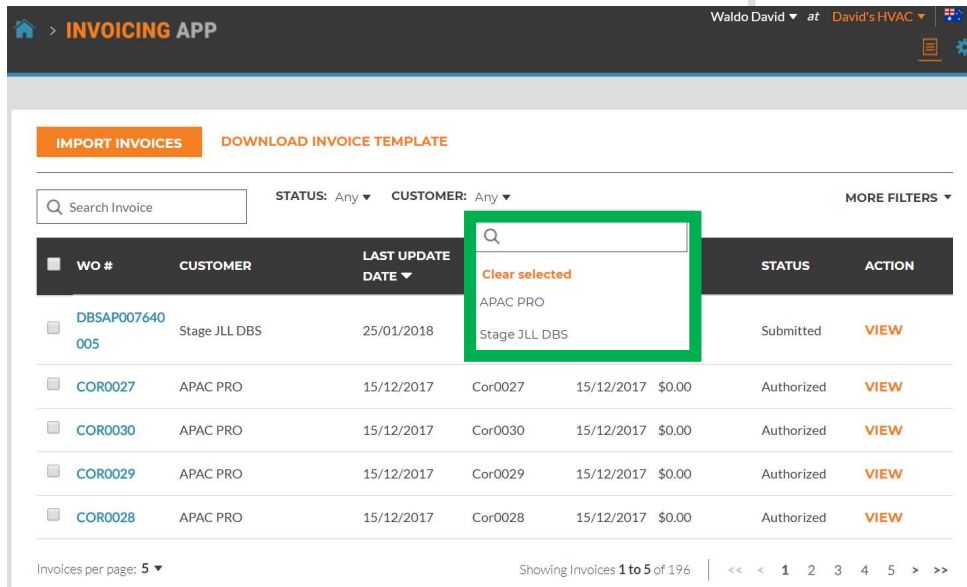
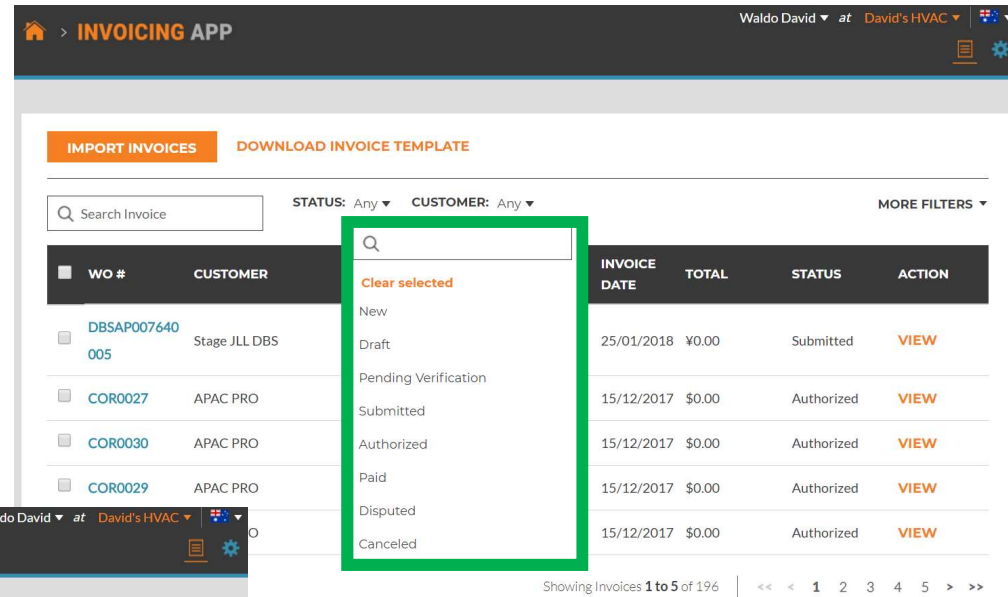
WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
DBSAP007640005	Stage JLL DBS	25/01/2018	DBSAP007640005	25/01/2018	¥0.00	Submitted	VIEW
COR0027	APAC PRO	15/12/2017	Cor0027	15/12/2017	\$0.00	Authorized	VIEW
COR0030	APAC PRO	15/12/2017	Cor0030	15/12/2017	\$0.00	Authorized	VIEW
COR0029	APAC PRO	15/12/2017	Cor0029	15/12/2017	\$0.00	Authorized	VIEW
COR0028	APAC PRO	15/12/2017	Cor0028	15/12/2017	\$0.00	Authorized	VIEW

Click on "Status"

Invoicing App: Status / Customer

Status Drop Down View

- Place a check to the right of the invoice status you wish to view
- Can view more than one status at a time
- Click “Clear selection” to view all invoices



Customer Drop Down

- View all customers or place a check to the right of the specific customer you wish to view
- Click “Clear select to view all customers

Invoicing App: More Filters

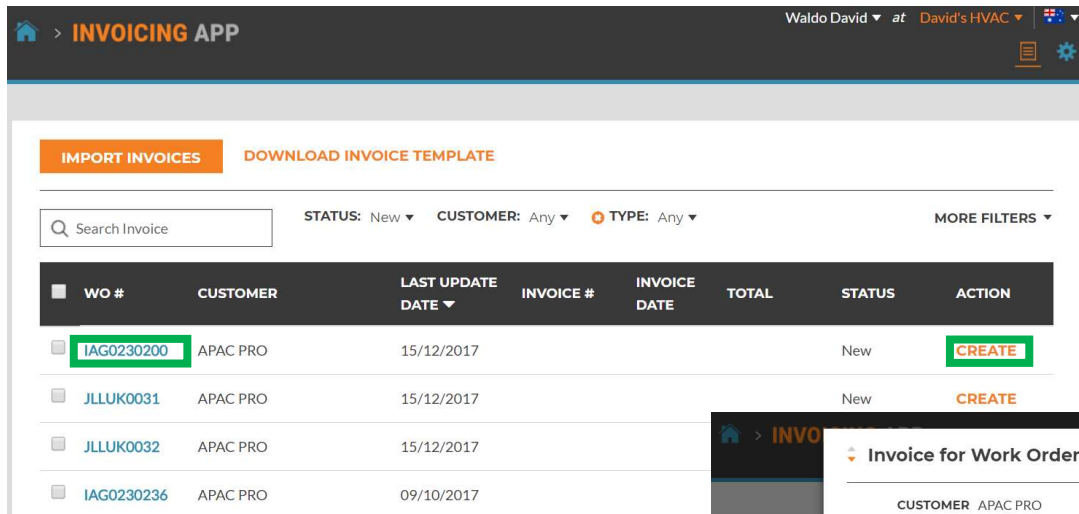
The screenshot shows the 'INVOICING APP' interface. At the top, there are navigation elements including a home icon, the app name, and user information (Waldo David at David's HVAC). Below this, there are buttons for 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. A search bar is labeled 'Search Invoice'. Filter options for 'STATUS: Any', 'CUSTOMER: Any', and 'TYPE: Any' are visible. A 'MORE FILTERS' dropdown menu is open, showing a search input, 'Clear selected', and two options: 'Reactive Work Orders' and 'PM/RM Work Orders'. The main table displays invoice data with columns for 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'INVOICE #', and 'ACTION'. The first row is highlighted with a green box. At the bottom, there are pagination controls showing 'Invoices per page: 5' and 'Showing Invoices 1 to 5 of 196'.

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	ACTION
DBSAP007640005	Stage JLL DBS	25/01/2018	DBSAP007640005	VIEW
COR0027	APAC PRO	15/12/2017	Cor0027	VIEW
COR0030	APAC PRO	15/12/2017	Cor0030	VIEW
COR0029	APAC PRO	15/12/2017	Cor0029	VIEW
COR0028	APAC PRO	15/12/2017	Cor0028	VIEW

More Filters

- Gives you the option of viewing invoices by Invoice Date, Last Update and invoice Type
- Click on "TYPE" to view invoices for Reactive Work Orders or PM/RM Work Orders
- Click "Clear select to view all invoices

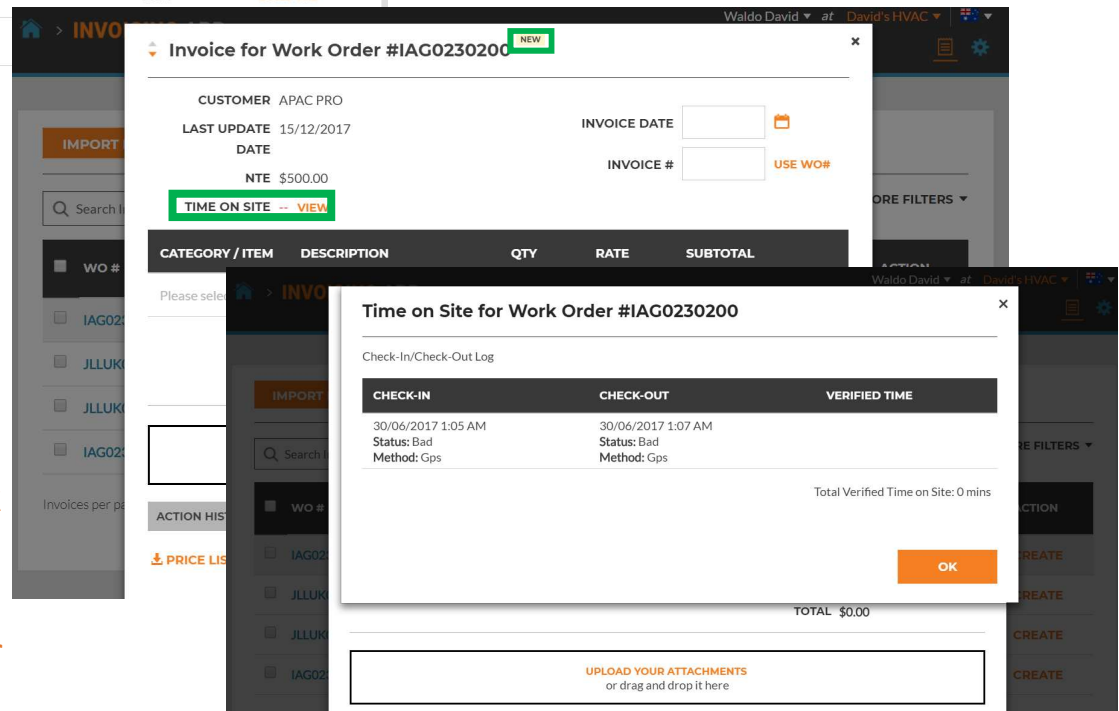
Invoicing App: Required Data / Creating a Single Invoice



- Click on the WO# to view the details of the work order
- Click on “Create” to open the desired invoice

View your Invoice

- Viewing a “New” invoice for work order #IAG00230200
- Click on “TIME ON SITE” to see how much time was spend provide this service
- Check in and Check out is recorded
- GPS location is ONLY recorded for Check in / Check Out
- “Bad is recorded if not within set distance from location, Good is recorder if within set distance



Invoicing App: Required Data fields

Waldo David at David's HVAC

Invoice for Work Order #IAG0230200 NEW

CUSTOMER APAC PRO

LAST UPDATE 15/12/2017

DATE

NTE \$500.00

TIME ON SITE -- [VIEW](#)

INVOICE DATE

INVOICE # [USE WO#](#)

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL
Please select		1	\$0.00	\$0.00

TAX \$0.00

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

ACTION HISTORY

[PRICE LIST](#) [RESET](#) [SUBMIT](#)

Start from the top

- Invoice date
- Invoice Number
- Category/Item | Description | QTY | Rate | Subtotal
- Tax
- Upload Attachments is optional

Invoicing Data Field: Date / Invoice Number

Invoice for Work Order #DEMO1000183

CUSTOMER APAC PRO

LAST UPDATE 10/11/2017

INVOICE DATE 10/12/2017

DATE

NTE \$575.00

INVOICE #

TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE
Please select		1	\$0.00

TAX 0

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS or drag and drop it here

ACTION HISTORY

PRICE LIST

RESET

Click on the "Calendar" icon

- Click on the date you wish to use for this invoice
- The date will populate in the date field
- Forward and back arrows will allow to customize the desired date used

Invoice

- By clicking on the "Use WO#" you can use the WO# as the invoice #
- Customize your invoice # by typing in the desired number you wish to use

Invoice for Work Order #IAG0230200

CUSTOMER APAC PRO

LAST UPDATE 30/01/2018

INVOICE DATE 30/01/2018

DATE

INVOICE # IAG0230200 USE WO#

NTE \$500.00

TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL
Please select		1	\$0.00	\$0.00

TAX \$0.00

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS or drag and drop it here

ACTION HISTORY

PRICE LIST

RESET

SUBMIT

Invoicing App: Required Data Fields / Itemize Invoice

Invoice for Work Order #IAG0230200

CUSTOMER APAC PRO
 LAST UPDATE 30/01/2018
 DATE
 NTE \$500.00
 TIME ON SITE -- VIEW

INVOICE DATE 30/01/2018
 INVOICE # IAG0230200 USE WO#

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ACTION
Please select		1	\$0.00	\$0.00	DELETE
	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Premium Rate - Taxable				
	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable				
	Bundled "Hard" Services - WA - Total Minimum Charge - OT Rate - Taxable				
	Bundled "Hard" Services - WA - Total Minimum Charge - Premium Rate - Taxable				
	Bundled "Hard" Services - WA - Total Minimum Charge - Reg. Rate - Taxable				
	John's Aussie-HVAC Std Labor				
	John's Aussie-OT Labor				

- Click under the “Category Item to open the text box
- If a rate card is used, select services from categories provided
- If no rate card is being used select from Labor/ Materials Parts/ Misc./Shipping/Services

- If rate card is used Category/ Item | Description | Rate and Subtotal will auto populate
- Manually populate invoice if using Labor/Material Parts/Mics/Shipping/ Services
- Tax has to manually populated

Invoice for Work Order #IAG0230200

CUSTOMER APAC PRO
 LAST UPDATE 30/01/2018
 DATE
 NTE \$500.00
 TIME ON SITE -- VIEW

INVOICE DATE 30/01/2018
 INVOICE # IAG0230200 USE WO#

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ACTION
Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE
Please select		1	\$0.00	\$0.00	
				TAX	\$0.00
				TOTAL	\$100.00

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

Invoicing App: Required Data Fields / Itemize Invoice

Invoice for Work Order #IAG0230200

CUSTOMER APAC PRO
LAST UPDATE 30/01/2018
DATE
INVOICE DATE 30/01/2018
INVOICE # IAG023020C USE WO#
NTE \$500.00
TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ACTION
Bundled "Hard" Ser...	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE
Taxable Material	Copper tubing	4.50	\$25.00	\$112.50	DELETE
Taxable Material	Trip Charge	1	\$55.00	\$55.00	DELETE

TAX \$0.00
TOTAL \$267.50

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

- NTE is the maximum amount an invoice can submit for, in this case NTE is \$500
- NTE is tax inclusive
- Add as many items as need in the invoice
- Description field is free text up to 1140 characters

- Once I have a total, taxes can be calculate and applied
- Total will be auto populated

Invoice for Work Order #IAG0230200

CUSTOMER APAC PRO
LAST UPDATE 30/01/2018
DATE
INVOICE DATE 30/01/2018
INVOICE # IAG023020C USE WO#
NTE \$500.00
TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ACTION
Bundled "Hard" Ser...	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE
Taxable Material	Copper tubing	4.50	\$25.00	\$112.50	DELETE
Taxable Material	Trip Charge	1	\$55.00	\$55.00	DELETE
Please select		1	\$0.00	\$0.00	

TAX \$26.75
TOTAL \$294.25

Invoicing App: Attaching Documents

CUSTOMER APAC PRO
LAST UPDATE 30/01/2018
DATE
NTE \$500.00
TIME ON SITE -- VIEW

INVOICE DATE 30/01/2018
INVOICE # IAG023020C USE WO#

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	
Bundled "Hard" Ser...	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE
Taxable Material	Copper tubing	4.50	\$25.00	\$112.50	DELETE
Taxable Material	Trip Charge	1	\$55.00	\$55.00	DELETE
Please select		1	\$0.00	\$0.00	

TAX \$26.75
TOTAL \$294.25

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

To attach a document click on "UPLOAD YOUR ATTACHMENTS"

File name: PM QTR HVAC Inspection

QTY	RATE	SUBTOTAL	
1	\$100.00	\$100.00	DELETE
4.50	\$25.00	\$112.50	DELETE
1	\$55.00	\$55.00	DELETE
1	\$0.00	\$0.00	

TAX \$26.75
TOTAL \$294.25

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

- The system will take you to your computer files
- Click on the file you wish to attach or you can drag and drop the file into your invoice
- Attach as many files as needed

Invoicing App: Bulk Invoice Import Template

IMPORT INVOICES **DOWNLOAD INVOICE TEMPLATE**

Search Invoice STATUS: Draft CUSTOMER: Any MORE FILTERS

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
IAG0230105	APAC PRO	15/12/2017	IAG0230105	11/05/2017	\$550.00	Draft	EDIT
IAG0230137	APAC PRO	15/12/2017	IAG0230137	28/06/2017	\$550.00	Draft	EDIT
IAG0230147	APAC PRO	15/12/2017	IAG0230147	11/05/2017	\$251.00	Draft	EDIT
IAG0230165	APAC PRO	15/12/2017	IAG0230165	29/06/2017	\$339.35	Draft	EDIT
IAG0230166	APAC PRO	15/12/2017	IAG0230166	28/06/2017	\$276.10	Draft	EDIT

Invoices per page: 5 Showing Invoices 1 to 5 of 24

IMPORT INVOICES **DOWNLOAD INVOICE TEMPLATE**

Search Invoice STATUS: Draft CUSTOMER: Any MORE FILTERS

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
IAG0230105	APAC PRO	15/12/2017	IAG0230105	11/05/2017	\$550.00	Draft	EDIT
IAG0230137	APAC PRO	15/12/2017	IAG0230137	28/06/2017	\$550.00	Draft	EDIT
IAG0230147	APAC PRO	15/12/2017	IAG0230147	11/05/2017	\$251.00	Draft	EDIT
IAG0230165	APAC PRO	15/12/2017	IAG0230165	29/06/2017	\$339.35	Draft	EDIT
IAG0230166	APAC PRO	15/12/2017	IAG0230166	28/06/2017	\$276.10	Draft	EDIT

Invoices per page: 5 Showing Invoices 1 to 5 of 24

InvoiceTemplate (3).zip

- To import multiple invoices at one time you will need to use the Invoice Template
- Click on "DOWNLOAD INVOICE TEMPLATE"

- The "Invoice Template" will appear in the lower left hand corner of your screen
- Click to open the template

Invoicing App: Bulk Invoice Import Template

	A	B	C	D	E	F	G	H
1	Work Order Number	Invoice Number	Invoice Date	Category/Item	Description	Quantity	Rate	Subtotal
2	8743	231	5/1/2016	Labor	back restroom and found	2.50	75.50	188.75
3	8743	231	5/1/2016	Labor	Handyman Services	1.00	65.00	65.00
4	43982	732	5/5/2016	Labor	Water heater installation	6.00	195.00	1,170.00
5	43982	732	5/5/2016	Parts & Materials	40-gallon Electric Water Heater	1.00	900.00	900.00
6	43982	732	5/5/2016	Miscellaneous	Trip charge	1.00	100.00	100.00
7	43982	732	5/5/2016	Miscellaneous	Administrative Fee	1.00	40.00	40.00
8	43982	732	5/5/2016	Tax	Tax	1.00	83.25	83.25

- You need to fill in the required data fields above
- DO NOT ADD any additional fields to the template

Things to Remember

- ✓ If rate card is being used, Category/Item must match rate card
 - ✓ When itemizing dates must match
 - ✓ Invoice has to be within NTE
 - ✓ Taxes must be applied
- Click on the “Help” tab to view details for filling out the template

	A	B	C	D	E	F	G	H
4	customers.							
5	This file InvoiceTemplate.xlsx contains two example invoices in the Invoices sheet. Before using this file for importing real invoices delete these example invoices. The two example invoices have numbers 231 and 732. Invoice #231 has two labor line items and no tax.							
6	Invoice #732 has 5 line items including tax.							
7								
8								
9	There is no limit on the number of invoices that can be included per file. You can include invoices for different CorrigoPro customers in the same file.							
10								
11	<u>Invoice Fields</u>							
12								
13	All invoice fields are required. The first 3 fields, Work Order Number, Invoice Number and Invoice Date, are duplicated for each invoice line item.							
14								
15								
16	The Excel format for each column is indicated in parentheses after the column name.							
17								
18	Work Order Number (Text) - the received CorrigoPro work order number.							
19								
20	Invoice Number (Text) - your invoice number. This can be any alphanumeric string from 1 to 32 characters in length. All invoice numbers for a given CorrigoPro client must be unique.							
21								
22	Invoice Date (Date) - your invoice date.							
23								
24	Category/Item (Text) - this must exactly match a valid Category/Item for this invoice. Category/Item values can differ per customer and, in unusual circumstances, different invoices for the same customer can require different Category/Items. To see the list of valid Category/Item values open the invoice page in the CorrigoPro Invoice App UI and select the Category/Item dropdown.							
25								
26								
27	Description (Text) - your additional description for the Category/Item. You can enter any description up to 1024 characters in length.							
28								
29	Note - for Canada if the Category/Item is “Tax” then the Description must be “HST”, “PST”, “GST” or “QST”. For other countries the description can be left empty (this is the only time a field can be left empty apart from the case of zero invoices - see FAQ section).							
30								
31								
32	Quantity (Number) - any non-zero integer or decimal number. For category “Labor” this should correspond to the hours and minutes in decimal format, e.g. 2 hrs is 2 or 2.0, 2 hrs 30 minutes is 2.5, etc.							
33								
34	Rate (Number) - do not include the currency type. CorrigoPro will automatically decide the currency type based on the location of the							
35								

Invoicing App: Importing Invoices

The screenshot shows the Invoicing App interface. At the top, there's a navigation bar with 'Waldo David' and 'at David's HVAC'. Below that, there are two buttons: 'IMPORT INVOICES' (highlighted with a green box) and 'DOWNLOAD INVOICE TEMPLATE'. A search bar is present with the text 'Search Invoice'. Below the search bar, there are filters for 'STATUS: Any' and 'CUSTOMER: Any'. A table of invoices is displayed with columns: WO #, CUSTOMER, LAST UPDATE DATE, INVOICE #, INVOICE DATE, TOTAL, STATUS, and ACTION. The table contains four rows of invoice data.

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
JLLUK0032	APAC PRO	01/02/2018	JLLUK0032	02/01/2018	\$93.50	Submitted	VIEW
JLLUK0031	APAC PRO	01/02/2018	JLLUK0031	02/01/2018	\$118.80	Submitted	VIEW
IAG0230200	APAC PRO	30/01/2018	IAG0230200	30/01/2018			
DBSAP007640	Stage JLL DBS	25/01/2018	DBSAP007640	25/01/2018			

- In the Invoicing App click on the “IMPORT INVOICES” button
- “IMPORT YOUR INVOCIES” box will be displayed, shown below

The screenshot shows a 'Bulk Invoice Import' dialog box. It contains the text: 'This feature allows you to import invoices from an Excel spreadsheet or a CSV file.' Below this text is a large green-bordered box with the text: 'IMPORT YOUR INVOICES or drag and drop it here'. At the bottom of the dialog, there is a link: 'If you are unsure of the right file format, click to download EXCEL AND CSV IMPORT TEMPLATES.'

- Click on “IMPORT YOUR INVOICES”
- A window will open to view your saved files
- Click on or drag and drop your saved import template
- This will start the import process

The screenshot shows a Windows File Explorer window. The address bar shows 'Documents > My Documents > Training Materials for Corriopro'. The main area displays a list of files in the 'Documents library'. The files are:

Name	Date modified	Type	Size
FEB 1st TEST	2/1/2018 12:28 PM	Microsoft Excel W...	81 KB
JLL Demo	11/7/2017 3:17 PM	Microsoft Excel W...	82 KB
Copy of ImportInvoicesErrors_2017-08-0...	8/9/2017 8:32 AM	Microsoft Excel W...	82 KB
JLL Demo 1	8/9/2017 8:31 AM	Microsoft Excel W...	82 KB
Waldo Rate Card	4/21/2017 2:13 PM	Microsoft Excel W...	14 KB

At the bottom of the window, there are 'File name:' and 'Custom Files' fields, and 'Open' and 'Cancel' buttons.

Invoicing App: Submit Bulk Imported Invoices

The screenshot shows the Invoicing App interface. At the top, there's a navigation bar with 'INVOICING APP' and user information. Below that, there are buttons for 'IMPORT INVOICES', 'DOWNLOAD INVOICE TEMPLATE', 'EXPORT', 'RESET', and 'SUBMIT'. A search bar and filter options for 'STATUS' and 'CUSTOMER' are also present. A table lists invoices with columns for 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'INVOICE #', 'INVOICE DATE', and 'TOTAL'. Two invoices, JLLUK0032 and JLLUK0031, are selected with checkboxes. A 'SUBMIT' button is highlighted in green. A confirmation dialog box asks 'Are you sure you want to submit 2 invoices? This cannot be undone.' with 'NO' and 'YES' options. Below the dialog, a table shows the submission progress and results for the two invoices, both marked as 'Success'. A 'DONE' button is highlighted in green.

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL
<input checked="" type="checkbox"/> JLLUK0032	APAC PRO	01/02/2018	JLLUK0032	02/01/2018	\$93.50
<input checked="" type="checkbox"/> JLLUK0031	APAC PRO	01/02/2018	JLLUK0031	02/01/2018	\$118.80
<input type="checkbox"/> IAG0230200	APAC PRO	30/01/2018	IAG0230200	30/01/2018	\$294.25
<input type="checkbox"/> DBSAP007640005	Stage JLL DBS	25/01/2018	DBSAP007640005	25/01/2018	¥0.00
<input type="checkbox"/> COR0027	APAC PRO	15/12/2017	Cor0027	15/12/2017	\$0.00

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	RESULT
JLLUK0031	APAC PRO	01/02/2018	JLLUK0031	02/01/2018	\$118.80	Success
JLLUK0032	APAC PRO	01/02/2018	JLLUK0032	02/01/2018	\$93.50	Success

- Imported invoices can now be submitted for payment, they will have a check next to them, shown above
- Click the "SUBMIT" button
- You are asked if you are sure you want to submit the invoices, click yes
- 2 invoices have been submitted successfully

Questions

Contact Corrigo via phone or online:

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