

How to Get Paid: Invoicing your Customers through CorrigoPro

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CorrigoPro Desktop Login

ORRIGOPRO DESKTOP		
davidw@corrigo.com		

Type in your email address and password to login to CorrigoPro	LOGIN	

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



Invoicing App

Waldo David V at David's HVAC V · • • • INVOICING APP IMPORT INVOICES DOWNLOAD INVOICE TEMPLATE STATUS: Any v CUSTOMER: Any v MORE FILTERS * Q Search Invoice LAST UPDATE INVOICE wo# CUSTOMER INVOICE # TOTAL STATUS ACTION DATE 🔻 DATE DBSAP007640 DBSAP007640 CUSTOMER VIEW 25/01/2018 25/01/2018 ¥0.00 Submitted 005 005 COR0027 15/12/2017 Cor0027 15/12/2017 \$0.00 Authorized VIEW CUSTOMER COR0030 15/12/2017 Cor0030 15/12/2017 \$0.00 Authorized VIEW CUSTOMER COR0029 CUSTOMER 15/12/2017 Cor0029 15/12/2017 \$0.00 Authorized VIEW CUSTOMER COR0028 15/12/2017 Cor0028 15/12/2017 \$0.00 VIEW Authorized Showing Involces 1 to 5 of 196 Invoices per page: 5 -<< < 1 2 3 4 5 > >>

Data Fields

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

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 selected" to view all invoices

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								Invo	ices per	r page: 5 🔻	,
0	IPORT INVOIC	ES DOW	NLOAD INVOICE 1	EMPLATE							
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•	wo #	CUSTOMER	LA DA	ST UPDATE	Q Clear select	led		STATU	s	АСТЮ	N
	DBSAP007640 005	CUSTOMER	25	/01/2018	(PRO Stage)			Submit	ted	VIEW	
	COR0027	CUSTOMER	15	/12/2017	Cor0027	15/12/2017	\$0.00	Author	ized	VIEW	
	COR0030	CUSTOMER	15	/12/2017	Cor0030	15/12/2017	\$0.00	Author	ized	VIEW	
	COR0029	CUSTOMER	15	/12/2017	Cor0029	15/12/2017	\$0.00	Author	ized	VIEW	
	COR0028	CUSTOMER	15	/12/2017	Cor0028	15/12/2017	\$0.00	Author	ized	VIEW	
Invoi	tes per page: 5 🔻				Showle	ng Invoices 1 to 5	of 196 <<	< 1	2 3	4 5	• ••

Waldo David 🔻 at David's HVA INVOICING APP IMPORT INVOICES DOWNLOAD INVOICE TEMPLATE STATUS: Any - CUSTOMER: Any -MORE FILTERS * Q. Search Invoice Q INVOICE wo# CUSTOMER STATUS TOTAL ACTION Clear selected DATE New DBSAP007640 CUSTOMER 25/01/2018 ¥0.00 VIEW Submitted Draft 00 Pending Verification COR0027 CUSTOMER 15/12/2017 \$0.00 Authorized VIEW Submitted COR0030 15/12/2017 \$0.00 Authorized Authorized VIEW CUSTOMER Paid COB0029 CUSTOMER 15/12/2017 \$0.00 Authorized VIEW Disputed ISTOMER 15/12/2017 \$0.00 Authorized VIEW Canceled Showing Involces 1 to 5 of 196 << < 1 2 3 4 5 > >>

Customer Drop Down

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

Invoicing App: More Filters

IN			OAD INVOICE TEMPLATE				
Q	Search Invoice		STATUS: Any V CUSTOME	R: Any 👻 👩 TYP	E: Any Y		MORE FILTERS
•	wo #	CUSTOMER	LAST UPDATE DATE 🔫	INVOICE #	Clear selected		ACTION
	DBSAP007640 005	CUSTOMER	25/01/2018	DBSAP007640 005	Reactive Work Orders		VIEW
	COR0027	CUSTOMER	15/12/2017	Cor0027	15/12/2017 \$0.00	Authorized	VIEW
	COR0030	CUSTOMER	15/12/2017	Cor0030	15/12/2017 \$0.00	Authorized	VIEW
	COR0029	CUSTOMER	15/12/2017	Cor0029	15/12/2017 \$0.00	Authorized	VIEW
	COR0028	CUSTOMER	15/12/2017	Cor0028	15/12/2017 \$0.00	Authorized	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 selected" to view all invoices

Invoicing App: Creating / Viewing a Single Invoice

								Waldo David 🔻 at	David's HVAC 🔻	-
		AFF								*
IN	IPORT INVOIC	ES DOWN	ILOAD INVOICE TE	EMPLATE						
Q	Search Invoice		STATUS: New •	CUSTOMER:	Any 🔻 😮 🏹	′PE: Any ▼			MORE FILTER	S ▼
	wo #	CUSTOMER	LAS DAT	T UPDATE	NVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION	
	IAG0230200	CUSTOMER	15/1	12/2017				New	CREATE	
	IAG0230137	CUSTOMER	15/1	12/2017				New	CREATE	
	IAG0230147	CUSTOMER	15/1	12/2017				New	CREATE	
	IAG0230236	CUSTOMER	09/1	10/2017				New	CREATE	
	Click	on the M	/O# to view	Λ/	• (1	ick on "	Croat	e" to oper	n the	

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

Invoicing App: Time on Site

CUSTOMED	CUSTOMER					
LAST UPDATE	15/12/2017		INVOICE DA	те	8	
DATE			INVOICI	=#	USE WO#	
I TIME ON SITE	\$500.00					ORE FILTERS
CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL		ACTION
Please select		1	\$0.00	\$0.00		
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ACTION HISTORY					•	
				RESET	SUBMIT	
± PRICE LIST				RESET	SUBMIT	
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± PRICE LIST	ite for Work Order	#IAG023020	00	RESET	SUBMIT	HVAC V T
PRICE LIST Time on S Check-In/Check-	iite for Work Order -OutLog	#IAG023020	00	RESET	SUBMIT	AHVAC - 1
PRICE LIST	Site for Work Order -OutLog CH	#IAG023020	00	RESET Walke I	SUBMIT Dade at David	Her MVAC > (*)
PRICE LIST	-OutLog	#IAG02302C	00	RESET Waldo I VERIFIED TIME	SUBMIT	
PRICE LIST Time on S Check-In/Check- CHECK-IN 30/06/2017 1: Status: Bad Method: Gps	Site for Work Order -Out Log :05 AM 300 Sta Me	#IAG02302C IECK-OUT /06/2017 1:07 AM atus: Bad atus: Gas	00	RESET Waldo I	SUBMIT	CY HVAC Y R
PRICE LIST Time on S Check-In/Check- Check-In/Check- Check-In/Check- Status: Bad Method: Gps	-Out Log -Out Log :05 AM 30 Sta Me	#IAG02302C IECK-OUT /06/2017 1:07 AM atus: Bad thod: Gps	00	RESET Waldo I VERIFIED TIME	SUBMIT	REFILTERS *
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Once you click "Create", you will see your invoice template

- Click on "TIME ON SITE" to see
 how much time was spent providing this service
- Check in and Check out times arerecorded
- GPS location is ONLY recorded for Check in / Check Out
- The status is set to "Bad" if not within set distance from location
- It is set to "Good" if within that set distance

Invoicing App: Required Data fields

					Waldo David 🔻 🛛	<i>at</i> Dav	id's HVAC 🔻	
	🗘 Invoice for V	Vork Order #IAG02	230200 NEW			×		*
	CUSTOMER (CUSTOMER		, r				
IMPORT	LAST UPDATE 1 DATE	5/12/2017		INVOICE DAT				
	NTE \$	500.00		INVOICE	USE WO	#		- 1
Q Search I	TIME ON SITE	- VIEW					ORE FILTERS	•
wo #	CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL		ACTION	Т
	Please select		1	\$0.00	\$0.00		_	
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		UPLOA or c	D YOUR ATTACHMEN Irag and drop it here	ITS			CREATE	
Invoices per pa	ACTION HISTORY					-		
				RE	SET SUBMIT			

Required Fields

- Invoice date
- Invoice Number
- Category/Item | Description | QTY | Rate | Subtotal
- Tax (If applicable)
- Uploading Attachments is optional

Invoicing Data Field: Date / Invoice Number

ñ) > INVOI	Invoice for Work Order #DEM	101000183	×	EST Pro 👻 📆 👻	<u>Click o</u>	<u>n the "Calendar</u>	" icon	
I	WPORT II Q Search In Wo # COROD DEMOS	CUSTOMER CUSTOMER LAST UPDATE 10/11/2017 DATE NTE \$575.00 TIME ON SITE - VIEW CATECORY / TEM DESCRIPTION Please select	INVOICE DATE INVOICE # Su 1 8 QTY RATE 15 22 1 \$0.00 5 TAX 0 TOTAL \$0.00	V2017 Cotostant Doctostant Vec Th 2 3 4 5 9 10 11 12, 16 17 18 19 23 24 25 26 30 31 1 2 6 7 8 9	▶ Fr Sa 6 7 13 14 20 21 27 28 3 4 10 11	 Click this The field Forv cust 	 c on the date you with the invoice date will populate ward and back arrowing the desired 	wish to us in the da ows will a date use	se for ate Ilow to d
		UPL	DAD YOUR ATTACHMENTS or drag and drop It here	☆ > INVO	÷ Invoice f	ior Work Order #	IAG0230200	Waldo David ▼ at D	avid's HVAC ▼ ₩ ▼
I	50C024 NSW00	ACTION HISTORY	RESET	IMPORT	CUSTON LAST UPD D	MER CUSTOMER ATE 30/01/2018 MATE \$500.00	INVOICE DATE 30/	'01/2018 [➡] 5023020C USE WO#	
	50C023	7 09/08/2017	\$0.00 F	Pendin Q Search II	TIME ON S CATEGORY / I Please select	SITE VIEW	QTY RATE SU	BTOTAL	
<u>Inv</u> •	OICE F By clic	Exing on the "Use Note that investigation of the Example of the Section of the Se	NO#" you can				TAX \$C TOTAL \$0.		EDIT
•	use in Custo the de	mize your invoice	# by typing in wish to use –	□ 1AG02: □ 1AG02: □ 1AG02:	ACTION HISTOR	5Å	UPLOAD YOUR ATTACHMENTS or drag and drop it here	•	EDIT
	Please	e DO NOT copy and	d paste into	Invoices per pa			RESET	SUBMIT	4 5 > >>

this field

Invoicing App: Required Data Fields / Itemize Invoice

> INVO	CUSTOMER C LAST UPDATE 3 DATE NTE \$ TIME ON SITE	Vork Order #IAGO: USTOMER 0/01/2018 500.00 VIEW	230200	INVOICE DA	Waldo Davi	id ▼ at Da ★ E WO#	vid's HVAC ¥ 👯 ¥	•	Click under "CATEGORY / ITEM" to open the text box If a rate card is used, select services from the items provided
 Wo # IAG02: IAG02: 	CATEGORY / ITEM Please select • Q Bundled "Hard" Servi	DESCRIPTION	QTY 1 C / Elec - Premium R	RATE \$0.00	SUBTOTAL \$0.00 DE	ELETE	ACTION EDIT EDIT	•	If no rate card is being used, select from Labor/ Materials Parts/ Misc./Shipping/Services
IAG02: IAG02: IAG02:	Bundled "Hard" Servi Bundled "Hard" Servi Bundled "Hard" Servi Bundled "Hard" Servi	ices - WA - Technician - HVA ices - WA - Total Minimum C ices - WA - Total Minimum C ices - WA - Total Minimum C	C / Elec - Reg. Rate - harge - OT Rate - Tay harge - Premium Rat harge - Reg. Rate - Ta	Taxable kable te - Taxable axable		¢ Invoid	EDIT ce for Work Orde	er #IA	G0230200 ^{BOARD} × <u>I</u> × <u>I</u> ×
Invoices per pa	John's Aussie-HVAC	Std Labor or			IMPORT	LAST	UPDATE 30/01/2018 DATE		INVOICE DATE 30/01/2018 INVOICE # IAG023020C USE WO#

- If rate card is used Category/ Item, Description, and Rate will autopopulate – QTY should be added
- Manually populate invoice if using Labor/Material Parts/Mics/Shipping/ Services
- Tax has to be manually populated

LAST UPDATE	30/01/2018		INVOICE DATE	30/01/2018	ö	
	;500.00		INVOICE #	IAG0230200	USE WO#	
TIME ON SITE	- VIEW					ORE FI
CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL		ACTIC
Bundled "Hard" Se▼	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE	EDIT
Please select		1	\$0.00	\$0.00		EDIT
			ТАХ	\$0.00		EDIT
			TOTAL	\$100.00		EDIT
	UPLOAD YOUF	R ATTACHME	NTS			4 5

Invoicing App: Required Data Fields / Itemize Invoice

	÷ Invoice for W	/ork Order #IAG02302	00 DRAFT		Waldo	David ▼ <i>at</i> David ▼ <i>at</i> David ▼	avid's HVAC ▼ ♥♥ ▼	•	NTE is th	e ma	aximun	n amo	ount t	hat an
IMPORT	CUSTOMER C LAST UPDATE 3 DATE	2USTOMER 20/01/2018		INVOICE DATE	30/01/2018	USE WO#			invoice care the	an b NTE	e subm is \$500	nitted C	for, i	n this
Q Search II	TIME ON SITE	- VIEW					ORE FILTERS 🔻	•	NTE is tax	x inc	lusive			
wo #	CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL		ACTION	•	Add as m	any	items	as ne	eded	in the
IAG02	Bundled "Hard" Ser	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE	EDIT	•	invoice Descripti	on fi	eld is f	ree te	ext ur	o to 1140
	Taxable Material	Copper tubing	4.50	\$25.00	\$112.50	DELETE	EDIT		character	rs			5770 O.P	
	Taxable Material	Trip Charge	1	\$55.00	\$55.00	DELETE								
IAG02:				ΤΑΣ ΤΟΤΑ	x \$0.00 L \$267.50	☆ > INV	• Invoice for	Work	Order #IAG023020	DRAFT		Waldo I	David ▼ at □	David's HVAC ▼ 👯 ▼
Invoices per pa		UPLOAD YOU or drag an	R ATTACHMEN d drop it here	ITS		IMPOR	CUSTOMER LAST UPDATE DATE	CUSTO	MER 2018		INVOICE DATE	30/01/2018 IAG0230200	📛 USE WO#	
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• (Once you	have a total,	taxes	s can			02: Bundled "Hard" Se	Bun r Tech Rate	dled "Hard" Services - WA - nnician - HVAC / Elec - Reg. e - Taxable	1	\$100.00	\$100.00	DELETE	EDIT
I	be calcula	ted and appr	lea				Taxable Material	Сор	per tubing	4.50	\$25.00	\$112.50	DELETE	EDIT
							Taxable Material	Trip	Charge	1	\$55.00	\$55.00	DELETE	EDIT
•	The total v	will be auto p	opul	ated			Please select			1	\$0.00	\$0.00		EDIT
						Invoices per	pa				κάτ Τόται	\$26.75 • \$294.25		4 5 > >>

Invoicing App: Attaching Documents

> IN\	/0	CUSTOMER C LAST UPDATE 3 DATE NTE \$ TIME ON SITE	USTOMER 0/01/2018 500.00 • VIEW		INVOICE DATE	30/01/2018 AG023020C	USE WO	d's HVAC 1 -		To at	tach a	a doci	umen	t clic	rk on		
ІМРО	RT	CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL										د "	
Q Sear	rch I. D #	Bundled "Hard" Ser	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE	ORE FILTE	RS -	UPL	UAD	YOUR	(AI IA	CHIN	VIENI	2	
		Taxable Material	Copper tubing	4.50	\$25.00	\$112.50	DELETE										
	502:	Taxable Material	Trip Charge	1	\$55.00	\$55.00	DELETE	EDIT									
	502	Please select		1	\$0.00	\$0.00		EDIT									
	502: 502:				TAT TOTA	x \$26.75 L \$294.25	0	Organize New folder Favorites	Documents libra	D/			• 0	Corrigo Enter	rprise 📘 NOC EM	IEA PRO 📘 NOC	EMEA Enterprise 🚥 JLL
Invoices p	5 02 (UPLOAD YOUR	ATTACHMEN	TS			Downloads Downloads Dropbox OneDrive - Corrig Recent Places Desktop	Training Materials for Con Name CorrigoPro Quick Refe 14. Vendor Bulletin - Go Support Model v3 revi Customer Signoff Sign	rigoPro erence Guide MOBL o Live 1st July 2017 ised 6.22 nature	Date modified 6/30/2017 8:24 PM 6/30/2017 8:16 PM 6/28/2017 8:43 AM 6/21/2017 8:45 PM	Arrange b Type Adobe Acrobat D Microsoft Word D Microsoft PowerP Microsoft Word D	yy: Folder ▼ Size ▲ D 558 K D 255 K D 1,111 K D 12 K	41	NVOICE DATE	30/01/2018 IAG0230200	USE WO#
•	Th	e system	n will take you	u to y	/our			Libraries Apps Concurnents Apps Concurnents Anusic Solutions Videos	PM QTR HVAC Inspect ATCW Form FAQ CORRIGO Austral Invoice App Comms to CORRIGOPRO Quick R CORRIGOPRO Invoice AP	tion ia (002) o Vendors Jeference Guide IP Training - Comms	6/21/2017 8:44 PM 6/21/2017 8:42 PM 6/14/2017 2:30 PM 6/9/2017 9:13 AM 6/9/2017 11:01 AM 6/5/2017 4:35 PM	Microsoft Word D Microsoft Word D Microsoft Word D Microsoft Word D Microsoft Word D Microsoft Word D	0	ĮΤΥ	RATE \$100.00	SUBTOTAL \$100.00	DELETE
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	yo	u can dra	ag and drop t	he fi	le into)			IAG02	Taxable Mater	rial Trip C	Charge	1	L	\$55.00 \$0.00	\$55.00 \$0.00	DELETE
	yo	ur invoic	e												TAX	\$26.75	
•	At	tach as n	nany files as r	need	ed										TOTAL	\$294.25	
			-						Invoices per pa			UF	PLOAD YOUR ATT or drag and dro	TACHMENTS			4

Invoicing App: Work Order Completion Details

Invoice for Work Order #Cor0054	DRAFT			=
CUSTOMER APAC PRO				
LAST UPDATE DATE 12/11/2018		INVOICE DATE	19/11/2018	Ħ
NTE \$250.00 AUD		INVOICE #	Cor0054	USE WO#
TIME ON SITE VIEW				
INVOICE BY 04/12/2018 12:00 AM				
CATEGORY / ITEM DESCRIPTION	QTY	RATE	AMOUNT	
Bundled "Hard" Ser Type in work details here	1.00	\$90.0000	\$90.00	â
Please select	1.00	\$0.0000	\$0.00	
		ТАХ	\$9.00 AUD	
None +		TOTAL	\$99.00 AUD	
WORK ORDER COMPLETION DETAILS				4
REPAIR CATEGORY Equip>Electrical VOF DON DESC		Work completed		
Closed (Circuit)				

Click on "REPAIR CATEGORY and "REPAIR CODE" to add in the details Type work order form drop down box

Type completion details in text box

Work order completion details can be added in the invoice by clicking on "WORK ORDER COMPLETION DETAILS"



Invoicing App: Work Order Print Out

CUSTOMER APAC PRO		INVOICE DA					
NTE \$250.00 AUD		INVOICE #	Cor0054	USE WO#			
INVOICE BY 04/12/2018 12:00 AM							
CATEGORY / ITEM DESCRIPTION	QTY	RATE	AMOUNT				
Bundled "Hard" Ser Type in work details here	1.00	\$90.0000	\$90.00	Ê			
Please select	1.00	\$0.0000	\$0.00				
		ТАХ	\$9.00 AUD				
None V		TOTAL	\$99.00 AUD				
WORK ORDER COMPLETION DETAILS				•			
				_			

Print out invoice as needed

Open an invoice Click on orange drop down box to print out invoice

11/19/2018		Invoice #Co	0054 Printout			
	•		INV	OICE WO Cor0054		
David's HVAC 1234 Dmytro Str, Hornet	RIGOPR	0				
	Customer APAC PRO		Invoice Date 19/11	/2018		
	egene Aplantitati vilice e envire Colocov She hybrareta, Ga 30005, US NTE \$250.00 AUD					
CATEGORY / ITEM Bundled "Hard" Services - ACT, NSW, QLD, VIC, TAS - Apprentice Technicia - Billing unit - OT Rat	DESCRIPTION Type in work details here	QТУ 1.00	RATE \$90.00 AUD	AMOUNT \$90.00 AUD		
- Taxable			Subtotal	\$90.00 AUD		
			Tax	\$9.00 AUD		
Work Done Description	: Work completed		Total	\$99.00 ADD		
If you have any ganillars, please	sal 41 2 342 1749					
https://apac-desktop.corrigopro.com	/Invoicing/Invoicing/Printout?invoiceId	1=138951				

Invoicing App: Bulk Invoice Import Template

IMPORT INVOIC	DOW	NLOAD INVOICE TEMPLATE									
Q Search Invoice STATUS: Draft V CUSTOMER: Any V											
■ wo #	CUSTOMER	LAST UPDATE DATE ▼	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION				
IAG0230105	CUSTOMER	15/12/2017	IAG0230105	11/05/2017	\$550.00	Draft	EDIT				
IAG0230137	CUSTOMER	15/12/2017	IAG0230137	28/06/2017	\$550.00	Draft	EDIT				
IAG0230147	CUSTOMER	15/12/2017	IAG0230147	11/05/2017	\$251.00	Draft	EDIT				
IAG0230165	CUSTOMER	15/12/2017	IAG0230165	29/06/2017	\$339.35	Draft	EDIT				
IAG0230166	CUSTOMER	15/12/2017	IAG0230166	28/06/2017	\$276.10	Draft	FDIT				

Showing Inv

InvoiceTem

- 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

Invoices per page: 5 -

• Click to open the template

Q	Search Invoice		STATUS: Draft - CUSTON	MER: Any V				MORE FILTERS *
	WO#	CUSTOMER	LAST UPDATE DATE 🔻	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
	IAG0230105	CUSTOMER	15/12/2017	IAG0230105	11/05/2017	\$550.00	Draft	EDIT
	IAG0230137	CUSTOMER	15/12/2017	IAG0230137	28/06/2017	\$550.00	Draft	EDIT
	IAG0230147	CUSTOMER	15/12/2017	IAG0230147	11/05/2017	\$251.00	Draft	EDIT
	IAG0230165	CUSTOMER	15/12/2017	IAG0230165	29/06/2017	\$339.35	Draft	EDIT
	IAG0230166	CUSTOMER	15/12/2017	IAG0230166	28/06/2017	\$276.10	Draft	EDIT
nvoid	ces per page: 5 🔻			Show	ring Invoices 1 to	5 of 24	<< < 1 2	3 4 5 > >>

Invoicing App: Bulk Invoice Import Template

4	А	В	С	D	F	F	G	н		
1	Work Order Number	Invoice Number	Invoice Date	Category/Item	Description	otion Quantity Rate		iption 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 Electic 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		
0										

6

q

10

11

12

16

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- 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 fill function Translation to some fill to some fill

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. Invoice #732 has 5 line items including tax.

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.

Invoice Fields

All invoice fields are required. The first 3 fields, Work Order Number, Invoice Number and Invoice Date, are duplicated for each invoice
 line item.

The Excel format for each column is indicated in parentheses after the column name.

Work Order Number (Text) - the received CorrigoPro work order number.

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.

Invoice Date (Date) - your invoice date.

24 Category/Item (Text) - this must exactly match a valid Category/Item for this invoice. Category/Item values can differ per customer and,
 25 in unusual circumstances, different invoices for the same customer can require different Category/Items. To see the list of valid
 26 Category/Item values open the invoice page in the CorrigoPro Invoice App UI and select the Category/Item dropdown.

Description (Text) - your additional description for the Category/Item. You can enter any description up to 1024 characters in length.

29 Note - for Canada if the Category/Item is "Tax" then the Description must be "HST", "PST", "GST" or "QST". For other countries the 30 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).

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.

Rate (Number) - do not include the currency type. CorrigoPro will automatically decide the currency type based on the location of the

Invoices Help

Invoicing App: Importing Invoices

>	INVOICING	АРР				Wal	do David ▼ at	David's HV	•c • ∰ • ≉	•	
		_									
IN	IPORT INVOIC	ES DOWNLOAD INV	OICE TEMPLATE								
Q	Search Invoice	STATUS: /	Any • CUSTOMER	≿ Any ▼				MORE FI	LTERS -	•	
•	wo#	CUSTOMER	LAST UPDATE DATE 🔻	INVOICE #	INVOICE DATE	TOTAL	STATUS	АСТК	N		
	JLLUK0032	CUSTOMER	01/02/2018	JLLUK0032	2 02 🏠	> INVOICING		ılk Invoi	ce Impo	ort	
	JLLUK0031	CUSTOMER	01/02/2018	JLLUK0031	1 02						
	IAG0230200	CUSTOMER	30/01/2018	IAG023020	0 30		This	feature allows	you to import i	invoices fr	om
	DBSAP007640	CUSTOMER	25/01/2018	DBSAP007	640 25	Q Search Invoice	ES		I	MPORT YO or drag an	o ur 1d d
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				ſ	Organize • New f	ments My Documents Ti	aining Materials for Cor	rigoPro	✓ ← Search Train	ing Materia)	۵
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D	ocumer	nts library			Uropbox OneDrive - Corrig Recent Places Desktop	Name FEB 1st TEST JLL Demo		Date modified 2/1/2018 12:28 PM 11/7/2017 3:17 PM	Type Microsoft Excel W Microsoft Excel W	Size 81 K 82 K	3B 3B
CI	ick on c	or drag and d	ronvour		 ▲ ○ Libraries ▶ ▲ Apps ▶ ● Documents 	JLL Demo 1	icestrors_2017-08-0	8/9/2017 8:32 AM 8/9/2017 8:31 AM 4/21/2017 2:13 PM	Microsoft Excel W Microsoft Excel W Microsoft Excel W	82 K 82 K 14 K	.в .В .В

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

- Click on of drag and drop your saved import template
- This will start the import process

	Bulk Invoice Import		×
02 	his feature allows you to import invoices from	m an Excel spreadsheet or a CSV file.	
40 25 Q Search Invoice	IMPORT YOU or drag and f you are unsure of the right file format, click	JR INVOICES drop it here to download EXCEL AND CSV IMPORT	MORE FILTERS ¥
WO # CUST	CorrigoPro	Corrigo Entermise Lin NOC EMEA PRO	ATUS ACTION
Favorites Documents library Training Materials for CorrigoPro	Arrange by: Folder •	Waldo E	David at David's HVAC
Image: Propbox Name OneDrive - Corrig Image: PEB 1st TEST Image: Paces Image: PEB 1st TEST Image: Desktop Image: PEB 1st TEST Image: Paces Image: PEB 1st TEST Image: Paces Image: PEB 1st TEST Image: Paces Image: Paces Image: Paces Image: Paces <td>Date modified Type Size 2/1/2018 12:28 PM Microsoft Excel W 81.KB 11/7/2017 3:17 PM Microsoft Excel W 82.KB 0. 8/9/2017 8:32 AM Microsoft Excel W 82.KB</td> <td>an Excel spreadsheet or a CSV file.</td> <td></td>	Date modified Type Size 2/1/2018 12:28 PM Microsoft Excel W 81.KB 11/7/2017 3:17 PM Microsoft Excel W 82.KB 0. 8/9/2017 8:32 AM Microsoft Excel W 82.KB	an Excel spreadsheet or a CSV file.	
Ibraries Image: Constraint of the second s	8/9/2017 8:31 AM Microsoft Excel W 82 K8 4/21/2017 2:13 PM Microsoft Excel W 14 K8	R INVOICES rop it here	MORE FILTERS *
Videos	ULL Custom Files	p download EXCEL AND CSV IMPORT	ATUS ACTION
		K0032 02/01/2018 \$93.50	Submitted VIEW
JLLUK0031 APAC	C PRO 01/02/2018 JLLU	UK0031 02/01/2018 \$118.80	Submitted VIEW

Invoicing App: Bulk Invoice Import

- Data errors are identified by the system, shown in "red"
- You can go ahead and import those that are correct
- Or you can cancel and fix those that need correcting first

Bulk Invoice Import Errors

If you continue, we will only be able to import 2 out of 4 invoices from FEB 1st TEST.xlsx. The list of invoices that we will not be able to import is below

	WO #	INVOICE #	INVOICE DATE	ІТЕМ	DESCRIPTION	QTY	RATE	SUBTOTAL	ERROR			
3			10/05/2017	Tax	Tax	1	10.8	10.8	The WO# is not specified. Invoice# needs to be specified.			
7	AIG023023 6	AIG023023 6	01/01/2018	Bundled "Hard" Services - ACT, NSW, QLD, VIC, TAS - Handyman - Billing unit - Premium Rate - Taxable	painted main entera	1	100	100	Work order with a matching WO# was not found.			
8	AIG023023 6	AIG023023 6	01/01/2018	Tax	Тах	1	10	10	Work order with a matching WO# was not found.			
	EXPORT CANCEL THE ENTIRE IMPORT 2 OUT OF 4 INVOICES											

	A	В	С	D	E	F	G	н	1.1	J	к	L	М	Ν	0
1	Work Order Number	Invoice Number	Invoice Date	Category/Item	Description	Quantity	Rate	Subtotal							
2	JLLUK0031	JLLUK0031	1/2/2018	Services - ACT,	NSW, QLD, VIC, TAS - Apprentice	1.20	90.00	108.00							
3			5/11/2017	Tax	Tax	1.00	10.80	10.80	The WC)# is not sp	ecified. I	nvoice# ne	eeds to be	specified	l.
4	JLLUK0031	JLLUK0031	1/2/2018	Tax	Тах	1.00	10.80	10.80							
5	JLLUK0032	JLLUK0032	1/2/2018	Bundled "Hard"	Bundled "Hard" Services - ACT,	1.70	50.00	85.00							
6	JLLUK0032	JLLUK0032	1/2/2018	Tax	Tax	1.00	8.50	8.50							
7	AIG0230236	AIG0230236	1/2/2018	Bundled "Hard"	painted main enterance door	1.00	100.00	100.00	Work o	rder with a	a matchin	g WO# wa	is not fou	nd.	
8	AIG0230236	AIG0230236	1/2/2018	Tax	Tax	1.00	10.00	10.00	Work o	rder with a	matchin	g WO# wa	is not fou	nd.	
9															
10															
11															

Invoicing App: Submit Bulk Imported Invoices

		INVOICING	АРР					Waldo David 💌 at		MC - 🔛 -							
_	_									<u> </u>							
	D	APORT INVOICE		DICE TEMPLATE				EXPORT RE	ISET	NBMIT							
	Q	Search Invoice	STATUS: A	my V CUSTOMER	≿ Any ▼				01						Waldo	David ▼ at Dav	vid's HVAC 🔻
	•	wo#	CUSTOMER	LAST UPDATE DATE 🔻	INVOICE #	INVOICE DATE	TOTAL		Sul	bmit Invoi	ce(s)						
		JLLUK0032	CUSTOMER	01/02/2018	JLLUK0032	02/01/2018	\$93.50	IMPOR	Are y T II	you sure you want	to submit 2 inv	oices? This canno	t be undone.				SUBM
		JLLUK0031	CUSTOMER	01/02/2018	JLLUK0031	02/01/2018	\$118.80								NO	YES	
	8	IAG0230200	CUSTOMER	30/01/2018	IAG0230200	30/01/2018	\$294.25	Q Search	ch Im								
		DBSAP007640 005	CUSTOMER	25/01/2018	DBSAP007640 005	25/01/2018	¥0.00	■ wo	#	CUSTOMER		LAST UPDATE DATE 🔻	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
		COR0027	CUSTOMER	15/12/2017	Cor0027	15/12/2017	\$0.00	 ✓ JLLU (A) (A) 		APAC PRO		01/02/2018	JLLUK0032	02/01/2018	\$93.50 Waldo David ▼	Draft at David's HVAC	

- 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

								*
Invoice S	Submission Pr	ogress a	nd Result	s				
You can cancel s	ubmission at any time by I	pressing the Cano	el button.					
wo #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	RESULT		
JLLUK0031	CUSTOMER	01/02/2018	JLLUK0031	02/01/2018	\$118.80	Success		
JLLUK0032	CUSTOMER	01/02/2018	JLLUK0032	02/01/2018	\$93.50	Success	APAC PRO Waldo David	X has submitted the invoi
							APAC PRO Waldo David	X



Contact Corrigo via phone or online:

https://corrigopro.com/contactus/