Managing Work Orders with CorrigoPro Desktop

Life of a work order – Desktop

During this tutorial we will cover…

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Log into Your CorrigoPro Desktop

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

CORRIGOPRO
DESKTOP

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

test@Corrigo.com

•••••••••••

☐ REMEMBER ME

LOGIN

FORGOT YOUR PASSWORD?

Then click "LOGIN"

SUPPORT   PRIVACY POLICY   TERMS OF USE

Locating Your Work Orders

From your CorrigoPro Desktop, click on the CorrigoPro tile

Locating Your Work Orders
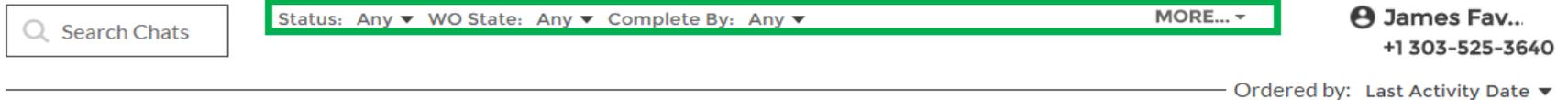
Along the top of the CruChat page you'll find clickable menus, allowing your to search and filter your CruChats.
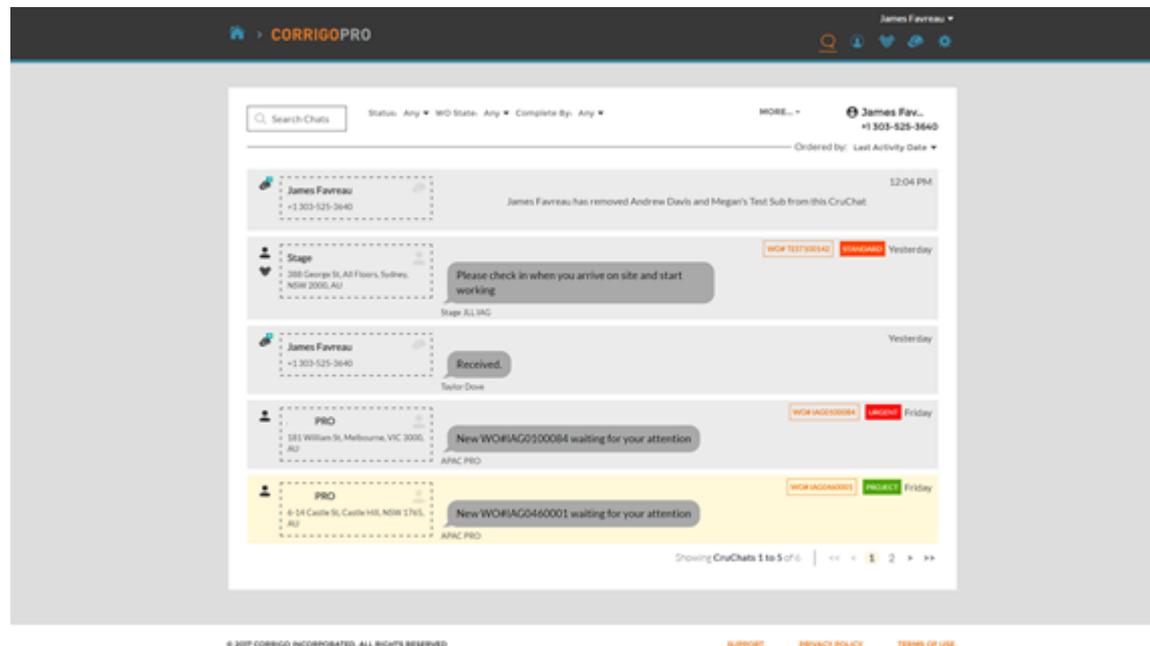
You will be taken to your CruChats page where you'll be able to locate all of the work orders sent by your connected customers

Locating Your Work Orders

Powerful filter options make it easy to sort your CruChats and work orders

Let's look for work orders still waiting for acceptance
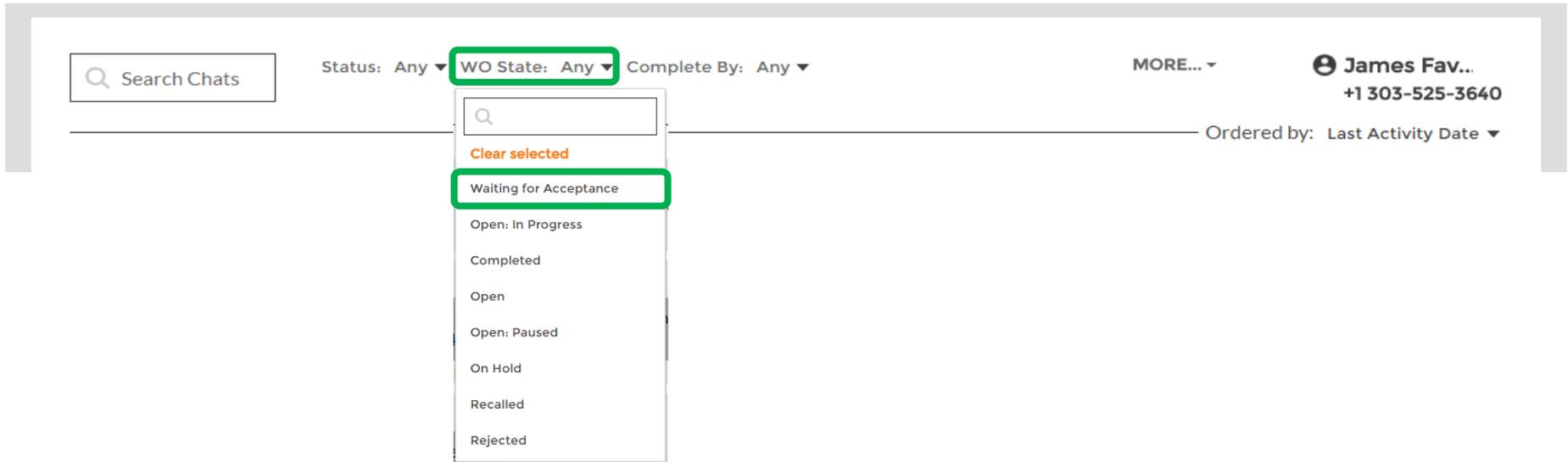
To find any CruChats with work orders that have not yet been accepted, click on the "WO State" menu, click on "Waiting for Acceptance"

Locating Your Work Orders

| Search Chats | **STATUS:** Any ▼ | **WO STATE:** Waiting for Acceptance ▼ | **COMPLETE BY:** Any ▼ | ☰ |

Ordered by: Last Activity Date ▼

APAC Demo

CorrigoPro Office
Alpharetta Office
1111 Alderman Drive, Suite 210,
Alpharetta, Ga 30005, US

WO# COR0081 WAITING FOR ACCEPTANCE URGENT 09/10/2018

New WO#Cor0081 is awaiting your attention

APAC Demo

David Waldo
+1 804-517-8865

10/04/2018

Got it.

Those in gray have already been opened

Thomas Fowler

David Waldo
+1 804-517-8865

09/04/2018

Your test is working!

Thomas Fowler

David Waldo
+1 804-517-8865

09/04/2018

James Favreau has been removed

David Waldo
+1 804-517-8865

09/04/2018

James Favreau has been removed

CruChat boxes in yellow have not been opened or have new information that needs to be read

Print a Work Order

Click on the work order you wish to print
Click on the drop down box
Click on "PRINTOUT" to print the selected work order

Reviewing a New Work Order

All details of the work order are contained within the CruChat, with every action time and date stamped

Orange text in the work order is clickable

To begin, scroll to the top of the work order

Click on the "MESSAGE" link to display information related to the work order, input by the customer

Accompanying Message

Contact information, work description, and procedural details may be included in the message

To exit the message box and return to the work order, click "CLOSE"

WO #Cor0081 Accompanying Message

Property: Corrigo alpharetta
Location: Alpharetta Office
Customer Contact: Tim Bernardez
Priority: Urgent - Please schedule technician arrival within the listed ETA.
Work Completion Due By: 9/10/2018 10:30 AM
Expanded Work Description: Roof Repairs and Maintenance:Leak:back left corner of the HQ building
Contact No: timb@corrigo.com

STANDARD PROCEDURES AND TERMS:

Prior to attending site, please ensure that you have contacted the Facilities Manager or the Onsite Contact listed below and arrange an appropriate time to attend within the Required Completion Time.

Check-in/check-out via your Corrigo Pro app is required when on-site.

The Corrigo Pro app can be downloaded from the Apple or Google App store.

For assistance or additional information related to this work order, please contact the JLL Property Service Centre at 1800 063 841.

For help with your Corrigo Pro account, please contact Corrigo Pro Support at apacsupport@corrigopro.com or call 1800 875 264

IMPORTANT OH&S and LEGAL INFORMATION:

GOOGLE TRANSLATE   CLOSE

Site Contact and Service Location
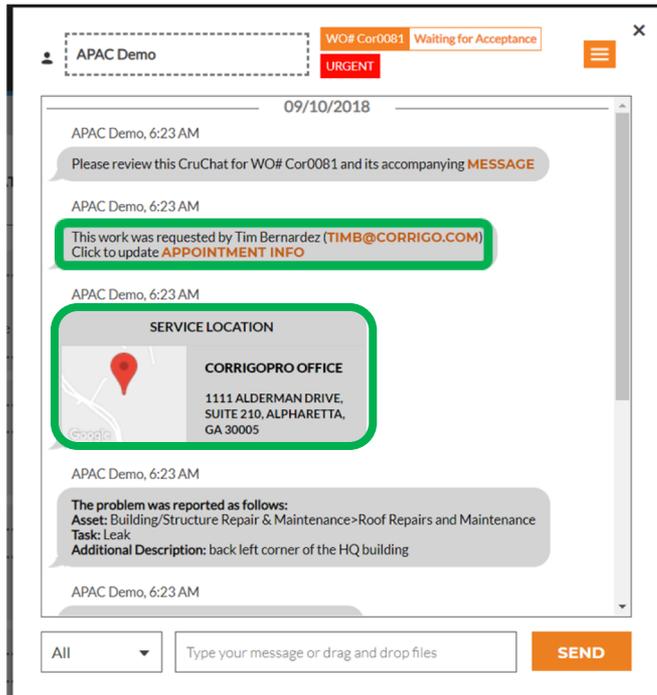
Next you will see the customer's site contact, with a clickable email or phone number link

Followed by the service location with the physical address and an interactive map link

Clicking on the map link will open the native mapping application on your PC to allow for specific directions and navigation to your customer's site
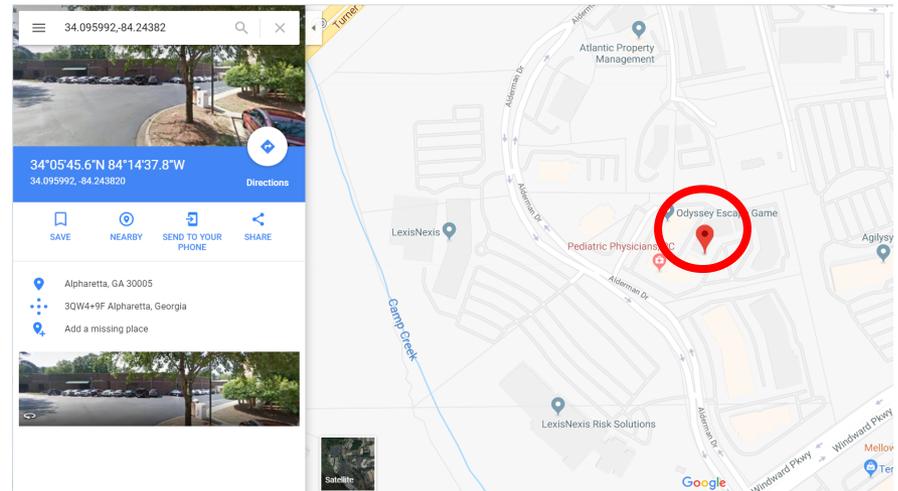
The Issue and SLA

Below the service location you will find the reported issue and/or requested task

The Service Level Agreement (SLA) for the work order is listed next

Be aware that your customer will rate you on your ability to meet the SLA timeframes

NTE: Not to Exceed

Next, you will see the Not To Exceed (NTE) amount for this work order

The NTE is determined by the customer as a ceiling cost for the requested repair or service

If you need to request an increase to the NTE amount, click on the "HERE" link, the "Submit Quote" box will appear

Submitting a Quote

Enter the quote amount for the requested service, and a description justifying the quote amount

Then click "SUBMIT"

The customer will be notified of the requested NTE increase and will have the opportunity to either accept or reject the quote
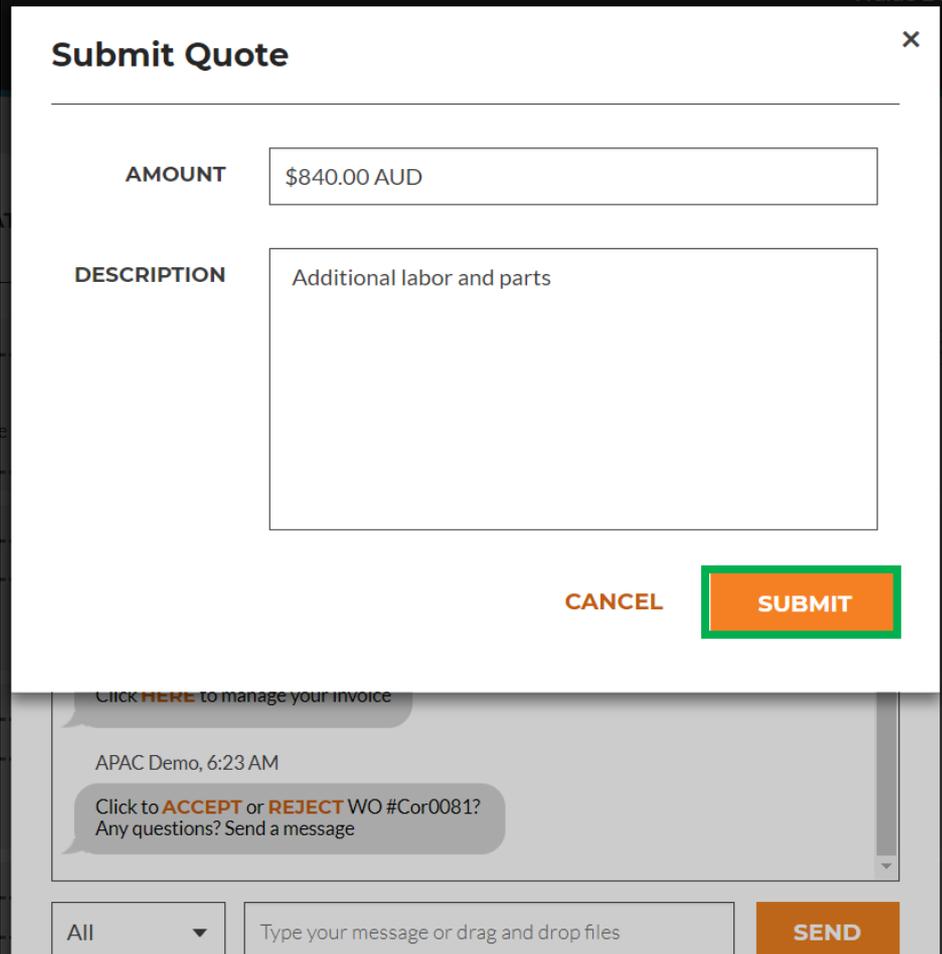
Submit Quote ✕

AMOUNT $840.00 AUD

DESCRIPTION   Additional labor and parts

CANCEL   **SUBMIT**

Click HERE to manage your invoice

APAC Demo, 6:23 AM

Click to ACCEPT or REJECT WO #Cor0081? Any questions? Send a message

All ▾   Type your message or drag and drop files   SEND

Accepted Quote and the New NTE

The details of the requested NTE increase are recorded, in real time, in the CruChat

In this example, the customer has approved the quote and the quote amount is now shown as the updated NTE amount

Accepting a Work Order

At the bottom of the original CruChat work order details, you will be prompted to either "ACCEPT" or "REJECT" the work order

Click "ACCEPT" to accept the work order or "REJECT" to reject the work order

The action will be timestamped in the CruChat, and the customer will be notified that their work order has been accepted or rejected

If you accept a work order, a new available action to "CHECK IN" and begin the work will appear

Attaching a document to a Work Order

Click on the work order
Once in the work order, click on the drop down box in the upper righthand corner
Click on "SEND FILE"

System will re-direct to the computer's Document Library
Click on the doc you wish to attach to the work order

Assigning a Work Order

When a work order is accepted, it can be assigned to a field technician or a Sub to complete the work

Click on the drop down box in the upper right corner of the screen

Click on ADD/REMOVE Participants to assign a CruMember or a Sub-contractor to the work order

Assigning a Work Order

CruMembers and connected Subs will appear, see the example on the left

Names that are grayed-out are CruLeads which are automatically included on all CruChats

To assign work, click the checkbox to the right of the desired Sub or CruMember's name

Enter a CruChat text message and click "Send"

The CruChat reflects the added CruMember and assignment of the work order

The work order is now assigned
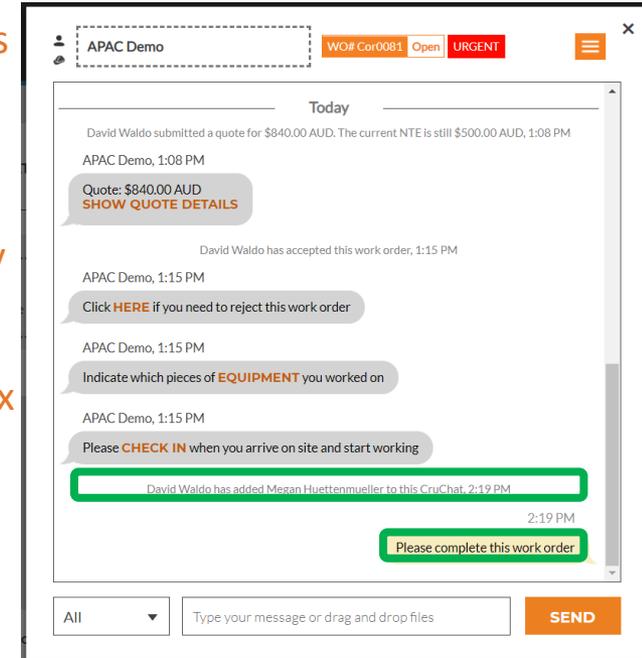
Checking In to START the Work Order
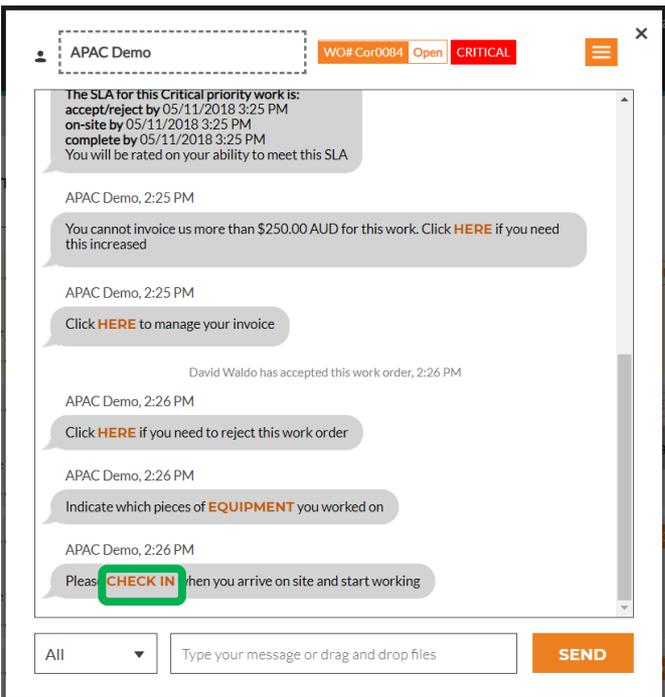
When a CruMember or Sub is assigned a work order, they will be required to check-in to start the work order

If in the Desktop, click orange "CHECK IN" to start the work order

The CruChat will update with a note indicating the location of the person that has checked in and begun work
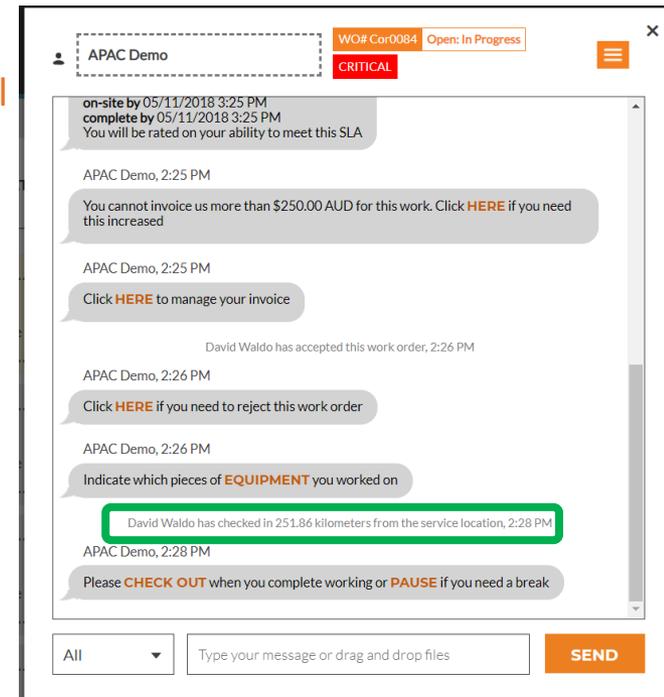
The customer will know that the technician was within a certain proximity to the site when checking in, and it begins to track time so that both the customer and service provider know how long it takes to complete the job

Pausing a Work Order

Sometimes you will need to pause the work order if the technician takes a break or leaves the site at the end of the day on a multi-day project

Click the orange "PAUSE" link

Once again the CruChat will be noted to record that the work order has been paused

When the technician is ready to recommence work they click on "CHECK IN"

Check Out and Complete the Work Order

When the work is completed, click on the orange "CHECK OUT" link

The "Complete Work Order" window will open where you should enter detailed comments about the work that was completed.

Repair Category and Repair Code

After entering your comments, select a "REPAIR CATEGORY" by clicking and accessing the repair category list

Repair Category and Repair Code

Then you will do the same for the "REPAIR CODE"
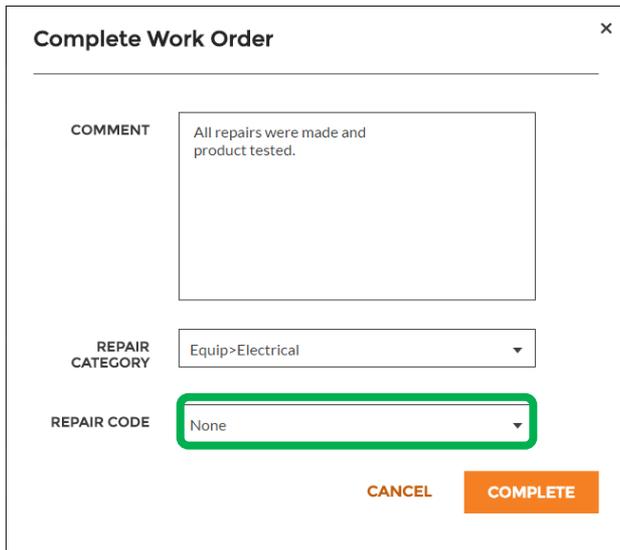
And click "COMPLETE"

Verifying and Rating the Work

When the technician has checked out and the work order has been completed, the customer will receive notification

Customers may rate the work during their verification process, and the rating will appear, with comments, in the CruChat verification message

If your customer has implemented the verification step as a requirement in the work order process, you will only be able to invoice the customer once their verification and work rating have been completed

The CruChat Link

To share a CruChat conversation via email or text, click on the link icon at the upper right of the CruChat window

This will generate an active CruChat link which you can copy and paste

Since the link is live, it will always show the current conversation - if the conversation continues, open the link again to see the new content

This is a powerful tool for archiving CruChat conversations or referencing specific work orders and details

Actions and Filters

Click on the CorrigoPro tile to view CruChats

Click on the orange box to view the Bulk / Filter options

Click on the drop down arrow next to the option you wish to use: "BULK ACTIONS"

This will open up the selectable categories within the selected option
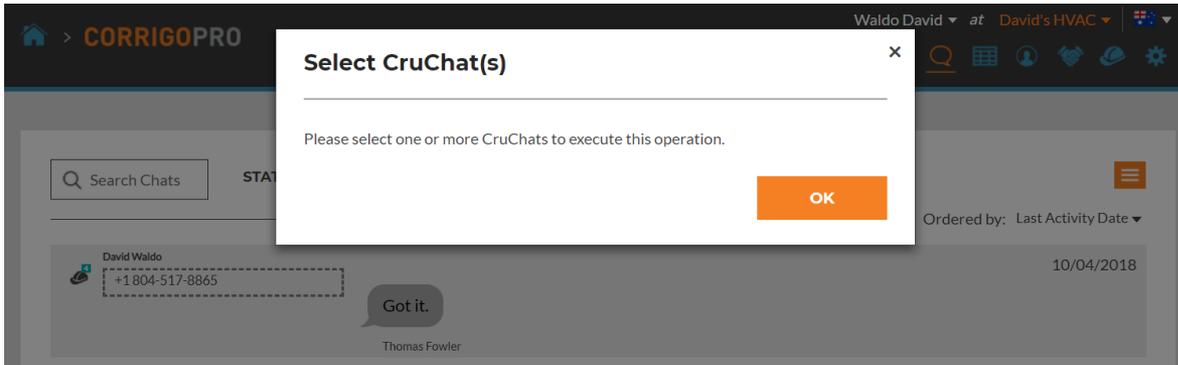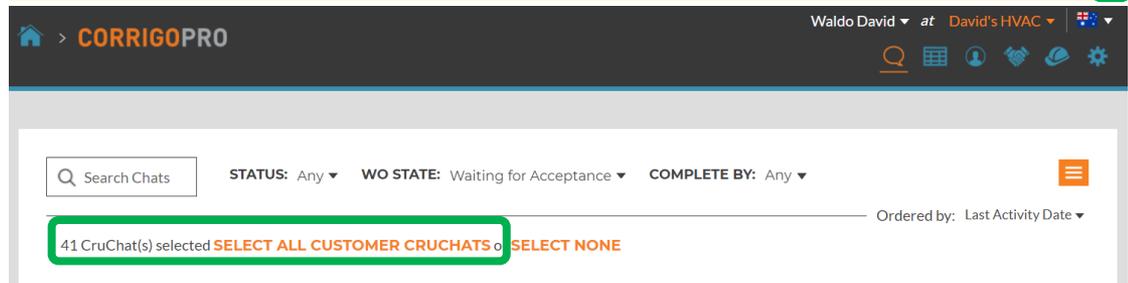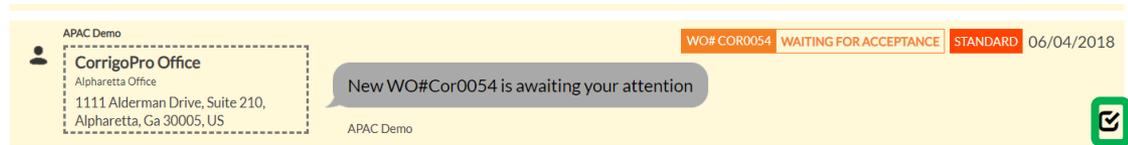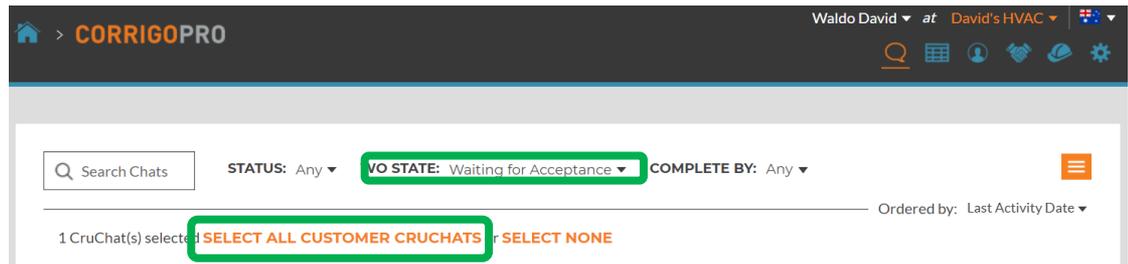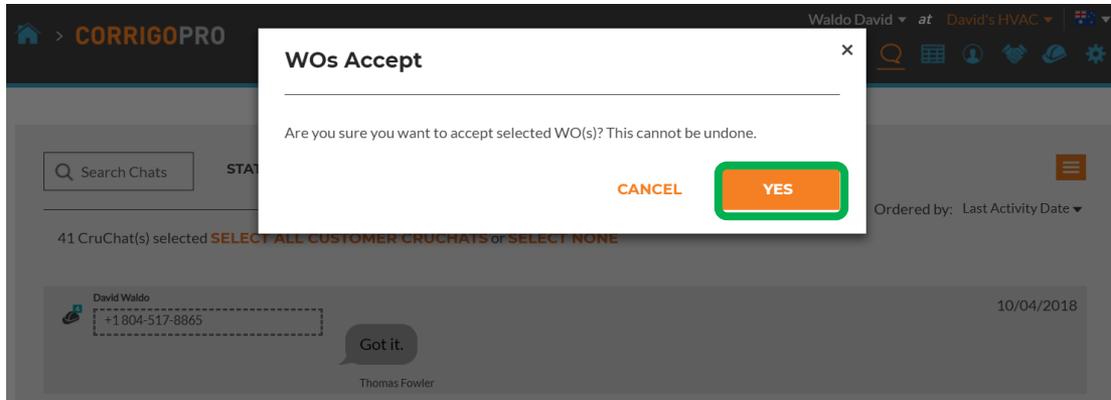
Actions and Filters

Click on the orange box to view the Bulk / Filter options
Click on the drop down arrow next to the option you wish to use:
 "BULK ACTIONS"
This will open up the selectable categories within the selected option

Actions and Filters: Bulk Accept

Work orders have been filtered by "WAITING FOR ACCEPTANCE"

Check the box to the right of the first work order Waiting for Acceptance
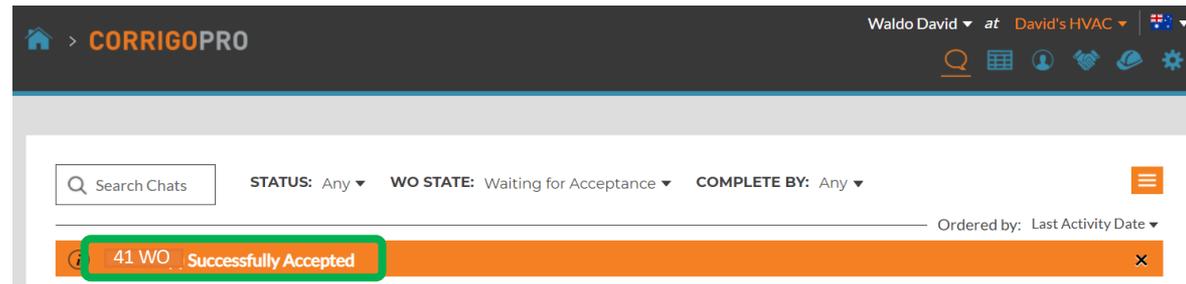
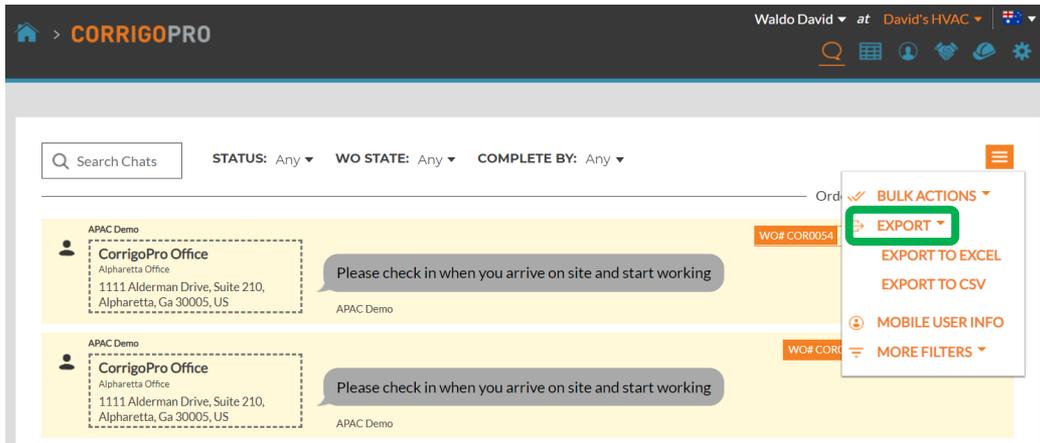Then click on "SELECT ALL CUSTOMER CURCHATS"

This will select all work orders that are waiting to be accepted

Actions and Filters: Bulk Accept

The system asks if you want to accept the selected work orders
Click "YES"
41 work orders will be Bulk Accepted

Actions and Filters: Export

The "EXPORT" function provides the ability for the user to export work order data in Excel or CSV format

Users can export all work orders at one time

To export work orders in a specific state click on "WO STATE", place a check next to the status of the work order orders to be exported

Example: WO State is "ACCEPTED WORK ORDERS", only the accepted work order would be exported
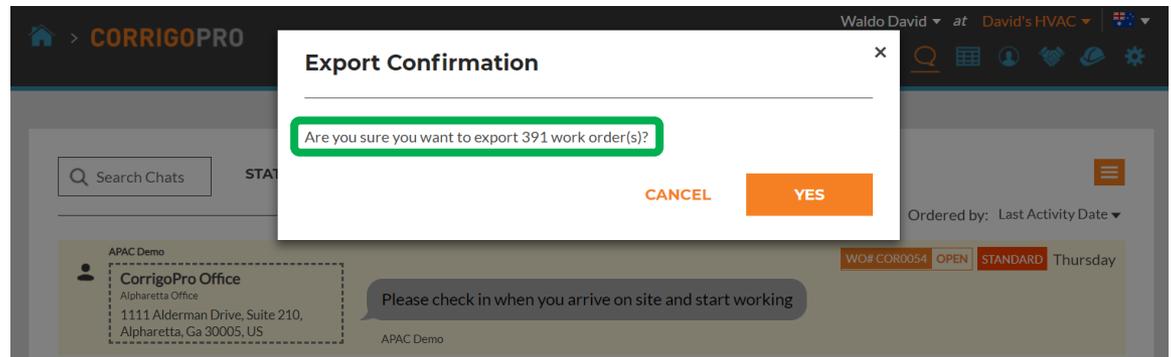
Actions and Filters: Mobile User Info

The system displays the information for the connected mobile users

Actions and Filters: Filters
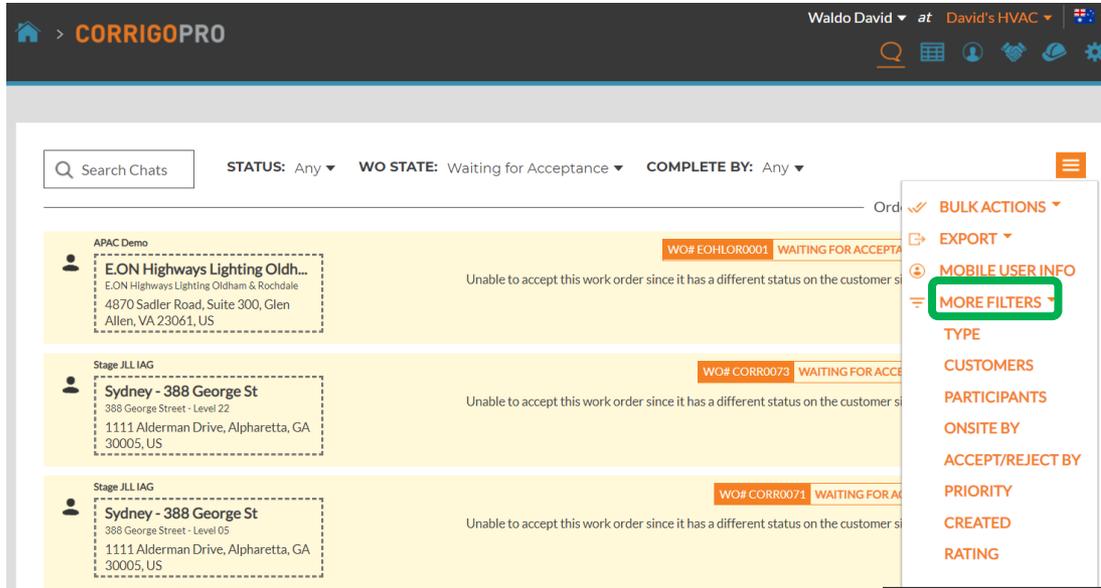
Clicking on "MORE FILTERS" allows the user to add filters to be used to provide additional details for the selected work orders

Here the user has added 'CUSTOMER' filter, "ACCEPTED/REJECTED" filter and 'TYPE' filters

This allows the user to select work orders using additional data provided by the added filters

Click on the orange "X" next to each filter to remove the filter
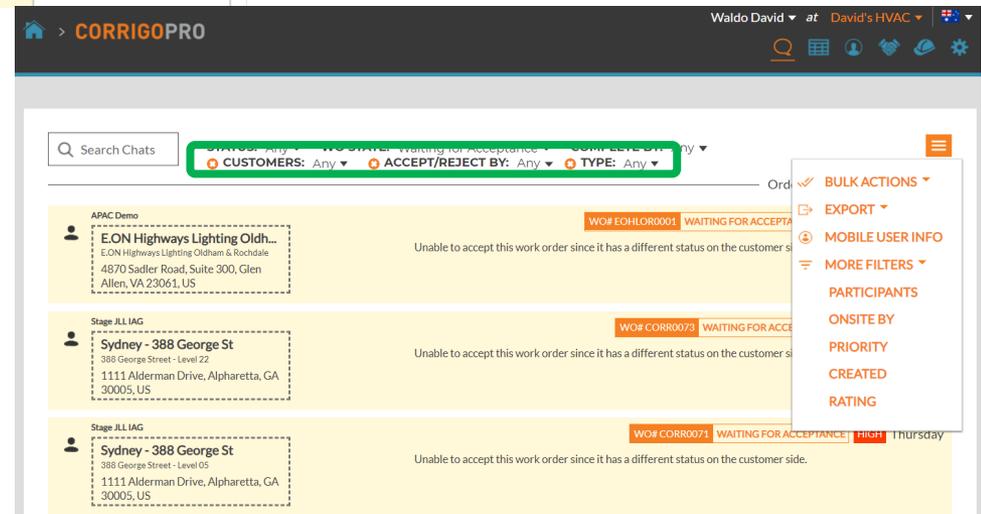
Exportable Data Table: Self Reporting

Click on the Data table icon to open the data table

Data table can be configured to fit your data needs
The table can be saved and shared with other users

Data Table: Selectable Data Categories

Using the slide bar at the bottom of the table, slide the bar all the way to the right

Click on the 3 dots in right corner of the table

Click on "Columns" to view the selectable data categories

31 selectable data categories

Data Table: Save /Share Data Tables

Click on drop down arrow to save or detect a table
Place a check in the "Shared" box if the user wishes to share the table with other users

Settings: Notifications / Advanced

Settings: Advanced

Questions

Contact Corrigo via phone or online:

https://corrigopro.com/contactus/