



CORRIGOPRO

Managing Work Orders with CorrigoPro Desktop

Life of a work order – Desktop

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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”

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Locating Your Work Orders

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	▲	42
WOs Overdue	▲	78
Open Reactive WOs		37
Open PM/RM WOs		0
Waiting for WO Completion Det...		0

81 your average score

2 customers are connected to you

INTEGRATE YOUR WORK ORDER SYSTEM DIRECTLY TO **corrigo**

Powered by **CORRIGOPRO DIRECT**

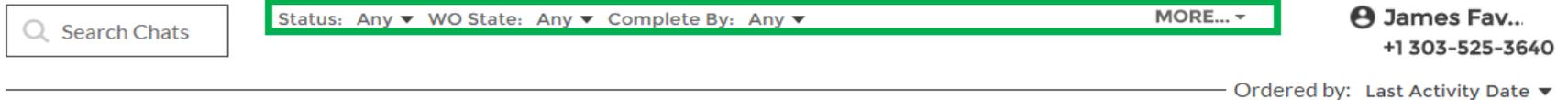
YOUR INVOICES NEED ATTENTION

32	27	0
ready to be invoiced WOs	draft invoices	disputed invoices

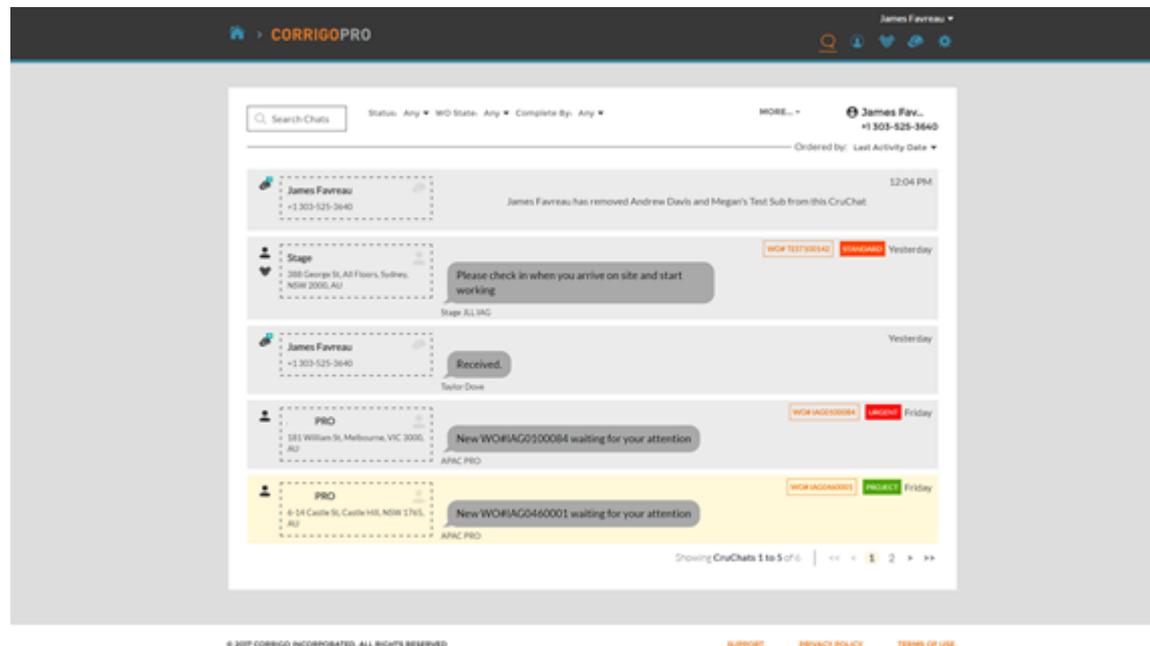
6 Completed
1 Open In Progress
2 Open
1 Waiting for Acceptance

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 you to search and filter your CruChats.

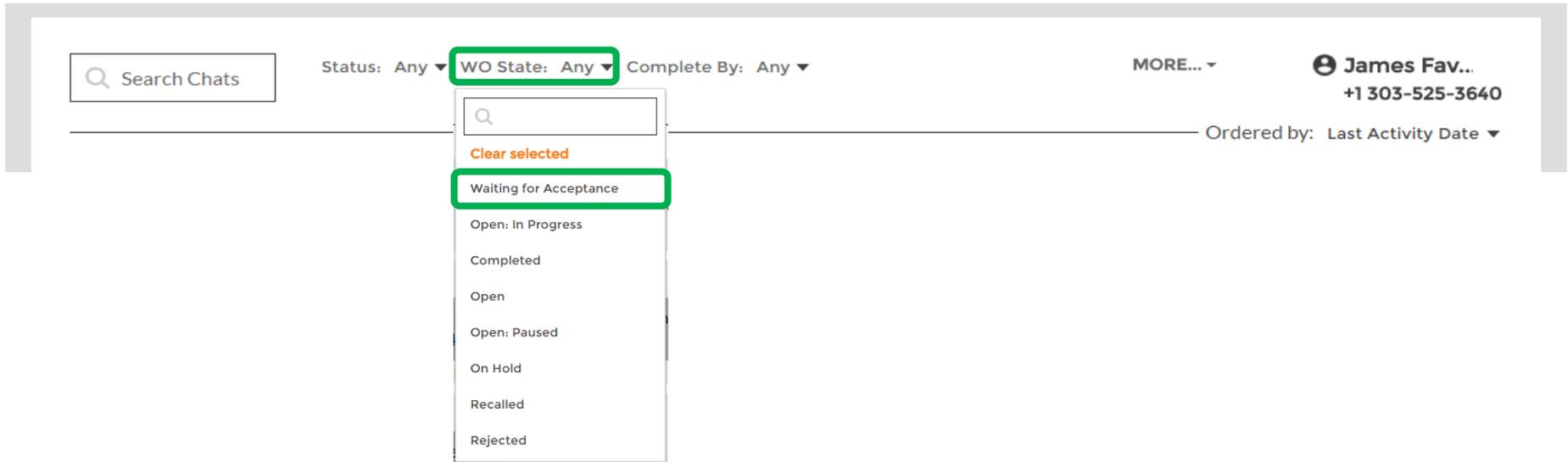


You will be taken to your CruChats page where you'll be able to locate all of the work orders sent by your connected customers

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



The screenshot shows a user interface for managing work orders. At the top left is a search bar labeled "Search Chats". To its right are filter options: "Status: Any", "WO State: Any", and "Complete By: Any". A "MORE..." dropdown is also present. On the right side, the user's name "James Fav..." and phone number "+1 303-525-3640" are displayed, along with an "Ordered by: Last Activity Date" dropdown. The "WO State: Any" dropdown menu is open, showing a search input, a "Clear selected" link, and a list of work order states: "Waiting for Acceptance", "Open: In Progress", "Completed", "Open", "Open: Paused", "On Hold", "Recalled", and "Rejected". The "Waiting for Acceptance" option is highlighted with a green box.

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 ▾

<p>APAC Demo</p> <p> CorrigoPro Office Alpharetta Office 1111 Alderman Drive, Suite 210, Alpharetta, Ga 30005, US</p>	<p>New WO#Cor0081 is awaiting your attention</p> <p>APAC Demo</p>	<p>WO# COR0081 WAITING FOR ACCEPTANCE URGENT 09/10/2018</p>
<p>David Waldo</p> <p> +1804-517-8865</p>	<p>Got it.</p> <p>Thomas Fowler</p>	<p>10/04/2018</p>
<p>David Waldo</p> <p> +1804-517-8865</p>	<p>Your test is working!</p> <p>Thomas Fowler</p>	<p>09/04/2018</p>
<p>David Waldo</p> <p> +1804-517-8865</p> <p></p>	<p>James Favreau has been removed</p>	<p>09/04/2018</p>
<p>David Waldo</p> <p> +1804-517-8865</p> <p></p>	<p>James Favreau has been removed</p>	<p>09/04/2018</p>

Those in gray have already been opened

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

Print a Work Order

The screenshot shows a mobile application interface for a work order. At the top, there's a header with 'APAC Demo', 'WO# Cor0052', 'Open', and 'HIGH'. A green box highlights a menu icon in the top right corner. Below the header is a chat window with several messages from 'APAC Demo, 1:04 AM'. The messages include: 'Please review this CruChat for WO# Cor0052 and i', 'This work was requested by Tim Bernardez (TIMB@CORRIGO.COM)', and 'The problem was reported as follows: Asset: Equipment>Security Task: Security Alarm Arming/Disarming Additional Description: Needs to be replaced'. Below the chat is a 'SERVICE LOCATION' section with a map and address: 'CORRIGOPRO OFFICE, 1111 ALDERMAN DRIVE, SUITE 210, ALPHARETTA, GA 30005'. At the bottom, there's a text input field with a 'SEND' button.

The screenshot shows a printed work order document. At the top, it says '11/15/2018' and 'Work Order #Cor0052 Printout'. The 'CORRIGOPRO' logo is prominently displayed. Below the logo is the address: 'David's HVAC, 1234 Dmytro Str, Homebush, NSW 2140, AU, (02) 3428 5749, For APAC Demo'. A box contains the text 'WORK ORDER #COR0052'. Below this, there's a section for 'Date Created: 6/04/2018 1:04:00 AM' and 'DO NOT EXCEED labor and materials of \$250.00 AUD. If you believe you will go over this amount, please submit a quote in CorriGoPro.' The 'Customer' section lists: 'Name: APAC Demo, Requested By: CorriGoPro Office, Alpharetta Office, Site Address: 1111 Alderman Drive, Suite 210, Alpharetta, Ga 30005, US, Service Contact Manager: Tim Bernardez timb@corriGo.com'. The 'Problem' section is 'Equipment > Security Security Alarm Arming/Disarming Needs to be replaced'. The 'Details' section includes: 'Status: Accept, Priority: High, Type: Reactive, Accept/Reject By: 6/04/2018 9:00:00 AM, On-Site By: 6/04/2018 1:00:00 PM, Complete By: 6/04/2018 3:00:00 PM, Appointment Type: N/A'. A 'Note' section contains: 'Property: CorriGo alpharetta, Location: Alpharetta Office, Customer Contact: Tim Bernardez, Priority: High - Please schedule technician arrival within the listed ETA, Work Completion Due By: 6/04/2018 3:00 PM, Expanded Work Description: Security Security Alarm Arming/Disarming Needs to be replaced, Contact No: timb@corriGo.com'. At the bottom, it says 'STANDARD PROCEDURES AND TERMS:' and a URL: 'https://apac-desktop.corriGo.com/ServiceChat/Chat/Printout/7964a709-5839-e811-80c0-a0369903144'. The page number '1/2' is in the bottom right corner.

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

The screenshot shows a mobile-style chat interface for a work order. At the top, the contact is identified as 'APAC Demo' with a profile icon. To the right, the work order number 'WO# Cor0081' is displayed in an orange box with the status 'Waiting for Acceptance'. Below this, a red 'URGENT' tag is visible. The date '09/10/2018' is centered above the chat messages. The first message, timestamped '6:23 AM', says 'Please review this CruChat for WO# Cor0081 and its accompanying MESSAGE', with the word 'MESSAGE' highlighted in a green box. The second message, also at '6:23 AM', states 'This work was requested by Tim Bernardez (TIMB@CORRIGO.COM) Click to update APPOINTMENT INFO', where 'APPOINTMENT INFO' is in orange. The third message, at '6:23 AM', is a 'SERVICE LOCATION' card featuring a map of 'CORRIGOPRO OFFICE' at '1111 ALDERMAN DRIVE, SUITE 210, ALPHARETTA, GA 30005'. The fourth message, at '6:23 AM', provides details: 'The problem was reported as follows: Asset: Building/Structure Repair & Maintenance>Roof Repairs and Maintenance Task: Leak Additional Description: back left corner of the HQ building'. The fifth message, at '6:23 AM', is partially visible. At the bottom, there is a dropdown menu set to 'All', a text input field with the placeholder 'Type your message or drag and drop files', and an orange 'SEND' button.

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.

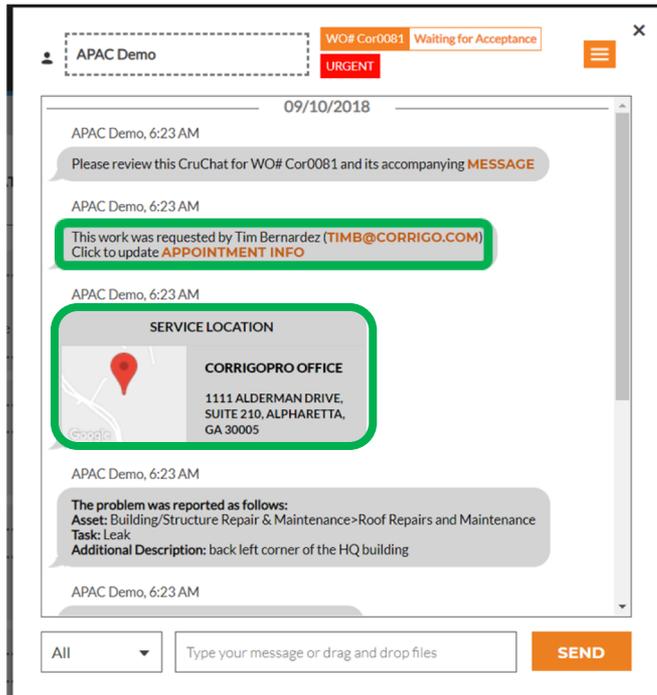
For assistance or additional information related to this work order, please contact the JLL Property Service Centre at 1800 063 841.

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

IMPORTANT OH&S and LEGAL INFORMATION:

[GOOGLE TRANSLATE](#) [CLOSE](#)

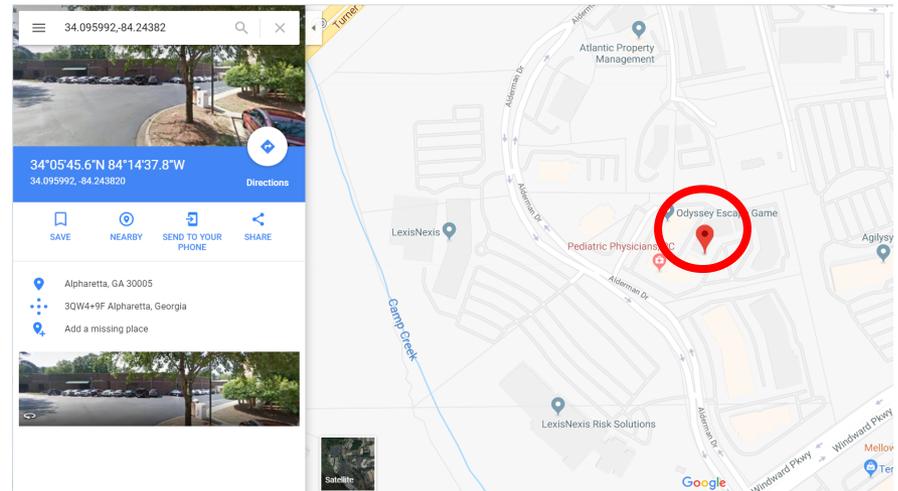
Site Contact and Service Location



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

The screenshot displays a customer communication window. At the top, there is a header with a user icon, the name "CUSTOMER", and navigation icons (share, menu, close). Below the header is a scrollable message history. The first message, highlighted with a green border, is from the customer and reads: "The problem was reported as follows: Asset: Landscaping, Task: Trees & Shrubs, Additional Description: maintenance and replacement", dated 3:11 PM. The second message, also highlighted with a green border, is from the customer and reads: "The SLA for this Project priority work is: on-site by 06/29/2017 11:00 PM, complete by 06/30/2017 3:00 AM, You will be rated on your ability to meet this SLA", dated 3:11 PM. The third message is from the customer and reads: "You cannot invoice us more than \$250.00 for this work. Click [HERE](#) if you need this increased", dated 3:11 PM. At the bottom of the window, there is a dropdown menu with "Cru" selected, a text input field with the placeholder "Type your message here", and a "SEND" button.

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

The screenshot shows a communication window for a work order titled 'APAC Demo'. At the top right, it displays 'WO# Cor0081' with a status of 'Waiting for Acceptance' and a red 'URGENT' tag. The main content area contains several messages from 'APAC Demo' at 6:23 AM:

- A message stating: 'The problem was reported as follows: Asset: Building/Structure Repair & Maintenance>Roof Repairs and Maintenance Task: Leak Additional Description: back left corner of the HQ building'.
- A message stating: 'The SLA for this Urgent priority work is: accept/reject by 09/10/2018 7:30 AM ⚠ on-site by 09/10/2018 8:30 AM complete by 09/10/2018 10:30 AM You will be rated on your ability to meet this SLA'.
- A message stating: 'You cannot invoice us more than \$500.00 AUD for this work. Click **HERE** if you need this increased'. The word 'HERE' is highlighted with a green box.
- A message stating: 'Click **HERE** to manage your invoice'.
- A message stating: 'Click to **ACCEPT** or **REJECT** WO #Cor0081? Any questions? Send a message'.

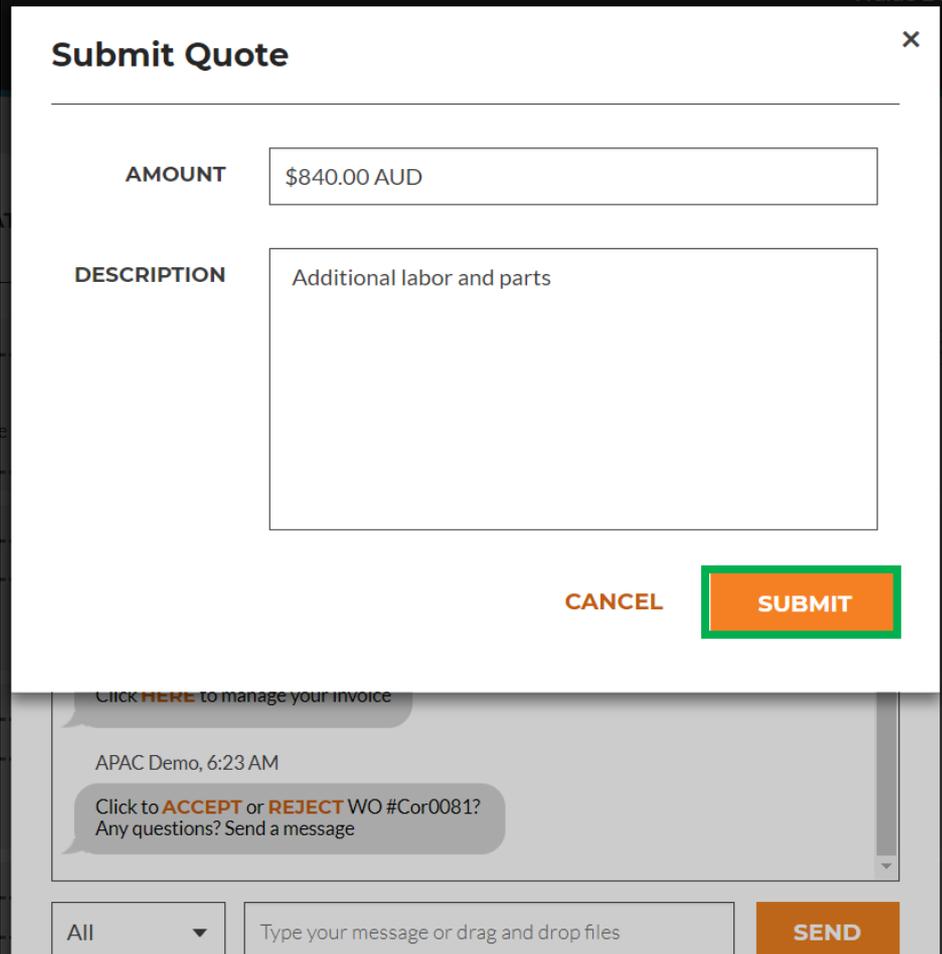
At the bottom of the window, there is a filter dropdown set to 'All', a text input field with the placeholder 'Type your message or drag and drop files', and a red 'SEND' button.

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



The screenshot shows a web interface for submitting a quote. At the top, there is a title bar with the text "Submit Quote" and a close button (X). Below the title bar, there are two main input fields: "AMOUNT" and "DESCRIPTION". The "AMOUNT" field contains the text "\$840.00 AUD". The "DESCRIPTION" field contains the text "Additional labor and parts". To the right of these fields, there are two buttons: "CANCEL" and "SUBMIT". The "SUBMIT" button is highlighted with a green border. Below the form, there is a chat window with a message from "APAC Demo, 6:23 AM" that says "Click to **ACCEPT** or **REJECT** WO #Cor0081? Any questions? Send a message". At the bottom of the chat window, there is a text input field with the placeholder "Type your message or drag and drop files" and a "SEND" button.

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

The screenshot displays a chat window for 'APAC Demo' with a work order 'WO# Cor0081' in 'Waiting for Acceptance' status and a priority of 'URGENT'. The chat history includes:

- Asset: Building/Structure Repair & Maintenance>Roof Repairs and Maintenance
- Task: Leak
- Additional Description: back left corner of the HQ building
- APAC Demo, 6:23 AM: The SLA for this Urgent priority work is: accept/reject by 09/10/2018 7:30 AM ⚠ on-site by 09/10/2018 8:30 AM complete by 09/10/2018 10:30 AM You will be rated on your ability to meet this SLA
- APAC Demo, 6:23 AM: Click [HERE](#) to manage your invoice
- APAC Demo, 6:23 AM: Click to [ACCEPT](#) or [REJECT](#) WO #Cor0081? Any questions? Send a message

A separator line indicates 'Today'.

- David Waldo submitted a quote for \$840.00 AUD. The current NTE is still \$500.00 AUD, 1:08 PM
- APAC Demo, 1:08 PM: Quote: \$840.00 AUD [SHOW QUOTE DETAILS](#)

The interface includes a dropdown menu set to 'All', a text input field with the placeholder 'Type your message or drag and drop files', and a 'SEND' button.

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

The screenshot displays a chat window for a work order. At the top, the chat is titled "APAC Demo" and shows the work order number "WO# Cor0081" with a status of "Waiting for Acceptance" and a red "URGENT" label. The chat content includes:

- Asset: Building/Structure Repair & Maintenance>Roof Repairs and Maintenance
- Task: Leak
- Additional Description: back left corner of the HQ building
- APAC Demo, 6:23 AM: "The SLA for this Urgent priority work is: accept/reject by 09/10/2018 7:30 AM ▲ on-site by 09/10/2018 8:30 AM complete by 09/10/2018 10:30 AM You will be rated on your ability to meet this SLA"
- APAC Demo, 6:23 AM: "Click [HERE](#) to manage your invoice"
- APAC Demo, 6:23 AM: "Click to **ACCEPT** or **REJECT** WO #Cor0081? Any questions? Send a message"
- Today separator
- David Waldo submitted a quote for \$840.00 AUD. The current NTE is still \$500.00 AUD, 1:08 PM
- APAC Demo, 1:08 PM: "David Waldo has accepted this work order, 1:15 PM"
- APAC Demo, 1:15 PM: "Click [HERE](#) if you need to reject this work order"
- APAC Demo, 1:15 PM: "Indicate which pieces of **EQUIPMENT** you worked on"
- APAC Demo, 1:15 PM: "Please **CHECK IN** when you arrive on site and start working"

Green boxes in the original image highlight the "ACCEPT/REJECT" prompt and the "CHECK IN" button.

Attaching a document to a Work Order

The screenshot shows a chat window for a work order titled "APAC Demo". The chat history includes messages from "APAC Demo" and "CorrigoPro Office". A dropdown menu is open in the top right corner, listing actions: "ADD/REMOVE PARTICIPANTS", "AVAILABLE ACTIONS", "PRINTOUT", "SEND FILE" (highlighted with a green box), and "SHARE CRUCHAT LINK". The work order status is "WO# Cor0052 Open HIGH".

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

The screenshot shows a Windows File Explorer window titled "Open" with the address bar set to "Documents > My Documents > Training Materials for CorrigoPro". The "Documents library" is displayed, showing a list of files. The file "CORRIGOPRO TRAINING 2018 - getting come..." is selected. The "File name" field is empty, and the "All Files" dropdown is visible.

This screenshot shows the same chat window as the first image, but with the "SEND FILE" option selected in the dropdown menu. The chat history and work order details remain the same.

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

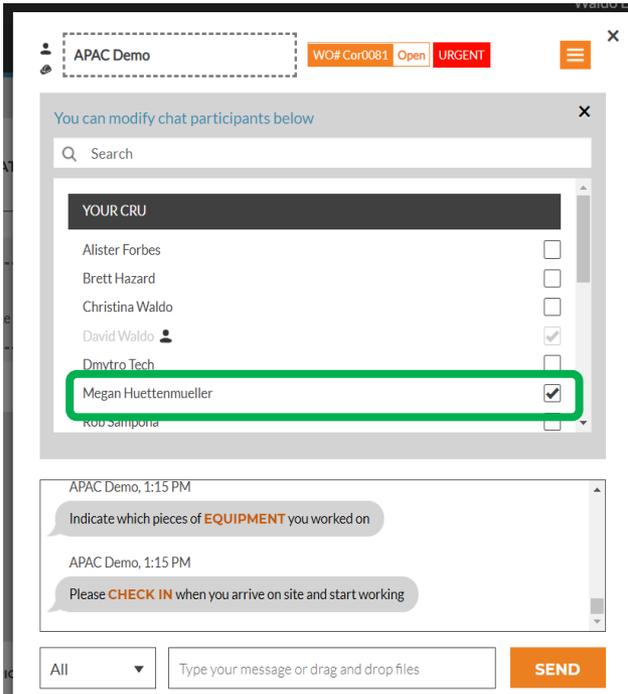
Click on ADD/REMOVE Participants to assign a CruMember or a Sub-contractor to the work order

The screenshot displays a work order interface for 'APAC Demo'. At the top, the work order number 'WO# Cor0081' is shown as 'Open' and 'URGENT'. A dropdown menu is open in the upper right corner, listing several actions: 'ADD/REMOVE PARTICIPANTS', 'AVAILABLE ACTIONS', 'PRINTOUT', 'SEND FILE', and 'SHARE CRUCHAT LINK'. The main chat area shows a timeline of messages:

- 6:23 AM: 'You will be rated on your ability to meet this SLA' (system message)
- 6:23 AM: 'APAC Demo, 6:23 AM' (sender)
- Message: 'Click **HERE** to manage your invoice'
- Separator: 'Today'
- 1:08 PM: 'David Waldo submitted a quote for \$840.00 AUD. The current NTE is still \$500.00 AUD, 1:08 PM' (system message)
- 1:08 PM: 'APAC Demo, 1:08 PM' (sender)
- Message: 'Quote: \$840.00 AUD **SHOW QUOTE DETAILS**'
- 1:15 PM: 'David Waldo has accepted this work order, 1:15 PM' (system message)
- 1:15 PM: 'APAC Demo, 1:15 PM' (sender)
- Message: 'Click **HERE** if you need to reject this work order'
- 1:15 PM: 'APAC Demo, 1:15 PM' (sender)
- Message: 'Indicate which pieces of **EQUIPMENT** you worked on'
- 1:15 PM: 'APAC Demo, 1:15 PM' (sender)
- Message: 'Please **CHECK IN** when you arrive on site and start working'

At the bottom, there is a dropdown menu set to 'All', a text input field with the placeholder 'Type your message or drag and drop files', and a 'SEND' button.

Assigning a Work Order



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

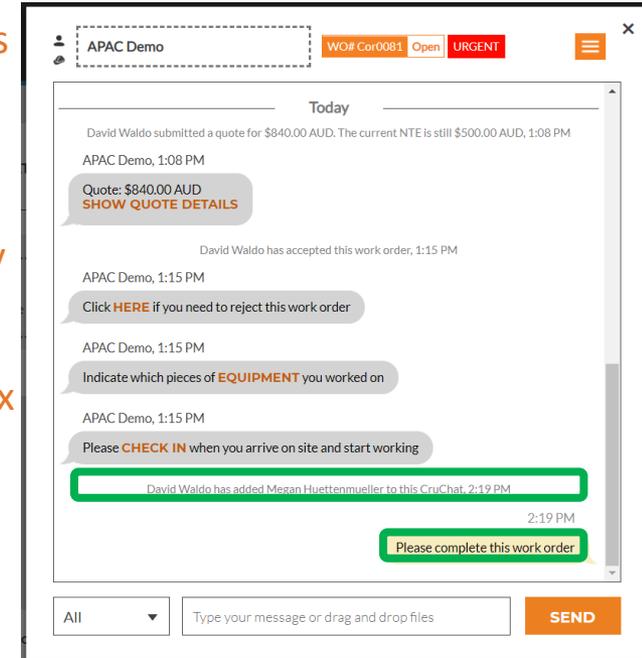
Names that are grayed-out are CruLeads which are automatically included on all CruChats

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

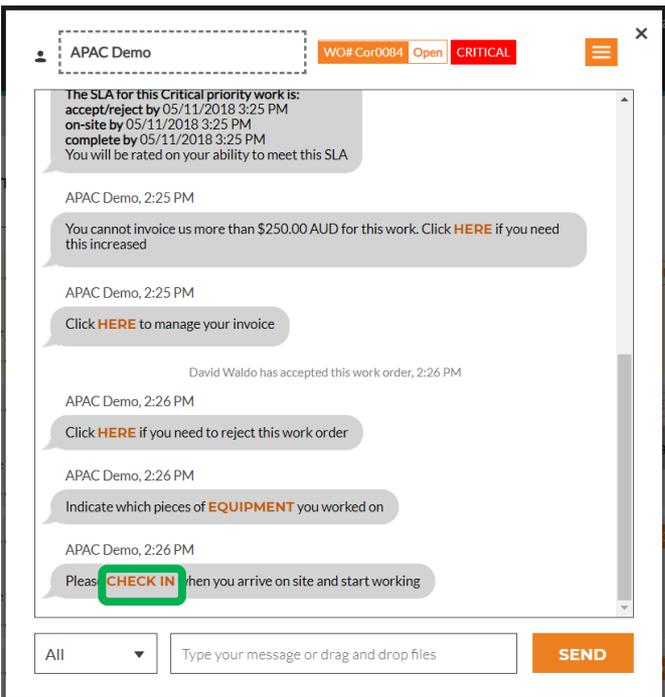
Enter a CruChat text message and click "Send"

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

The work order is now assigned



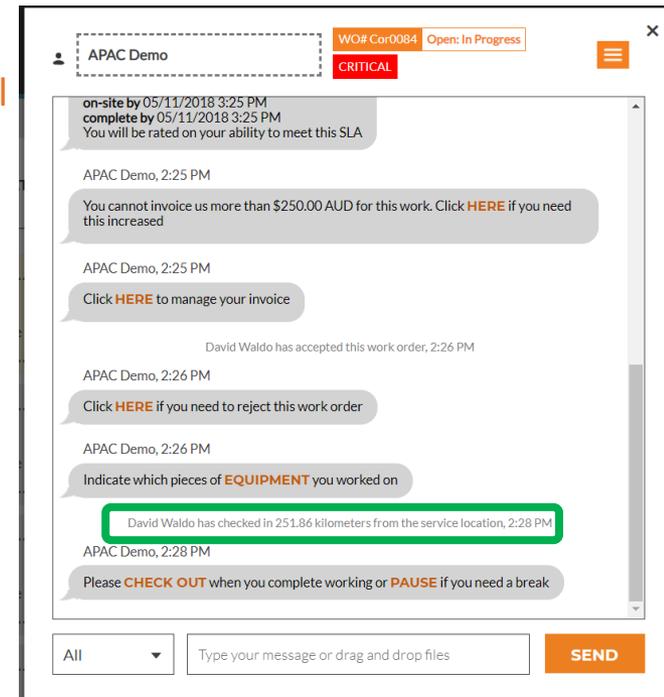
Checking In to START the Work Order



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"

APAC Demo

WO# Cor0084 Open: In Progress

CRITICAL

on-site by 05/11/2018 3:25 PM
complete by 05/11/2018 3:25 PM
You will be rated on your ability to meet this SLA

APAC Demo, 2:25 PM

You cannot invoice us more than \$250.00 AUD for this work. Click [HERE](#) if you need this increased

APAC Demo, 2:25 PM

Click [HERE](#) to manage your invoice

David Waldo has accepted this work order, 2:26 PM

APAC Demo, 2:26 PM

Click [HERE](#) if you need to reject this work order

APAC Demo, 2:26 PM

Indicate which pieces of **EQUIPMENT** you worked on

David Waldo has checked in 251.86 kilometers from the service location, 2:28 PM

APAC Demo, 2:28 PM

Please [CHECK OUT](#) when you complete working or [PAUSE](#) if you need a break

All Type your message or drag and drop files SEND

APAC Demo

WO# Cor0084 Open: Paused

CRITICAL

You will be rated on your ability to meet this SLA

APAC Demo, 2:25 PM

You cannot invoice us more than \$250.00 AUD for this work. Click [HERE](#) if you need this increased

APAC Demo, 2:25 PM

Click [HERE](#) to manage your invoice

David Waldo has accepted this work order, 2:26 PM

APAC Demo, 2:26 PM

Click [HERE](#) if you need to reject this work order

APAC Demo, 2:26 PM

Indicate which pieces of **EQUIPMENT** you worked on

David Waldo has checked in 251.86 kilometers from the service location, 2:28 PM

David Waldo has paused this work order 251.86 kilometers from the service location, 2:32 PM

APAC Demo, 2:32 PM

Please [CHECK IN](#) when you arrive on site and start working

All Type your message or drag and drop files SEND

Check Out and Complete the Work Order

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

The screenshot shows a chat window for a work order titled "APAC Demo". At the top right, it displays "WO# Cor0084" with a status of "Open: In Progress" and a red "CRITICAL" tag. The chat history includes several messages from "APAC Demo" and "David Waldo". The most recent message from "APAC Demo" at 2:36 PM says "Please **CHECK OUT** when you complete working or **PAUSE** if you need a break". The words "CHECK OUT" are highlighted with a green rectangular box. At the bottom of the chat window, there is a text input field with a dropdown menu set to "All" and a "SEND" button.

The screenshot shows a "Complete Work Order" form. The title "Complete Work Order" is at the top left, and a close button "X" is at the top right. The form has two main sections. The first section is labeled "WORK DONE DESCRIPTION" in a green box and contains the text "Circuit breaker for the main conference room has been replaced". The second section is labeled "REPAIR CATEGORY" and has a dropdown menu currently set to "None". At the bottom right of the form, there are two buttons: "CANCEL" and "NEXT". Below the form, there is a chat window showing a message from "David Waldo" at 2:36 PM: "Please **CHECK OUT** when you complete working or **PAUSE** if you need a break". At the bottom of the chat window, there is a text input field with a dropdown menu set to "All" and a "SEND" button.

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

Complete Work Order [X]

COMMENT

REPAIR CATEGORY: None

CANCEL COMPLETE

- *Not a Failure
- Equip>Catastrophic Event
- Equip>Commissioning
- Equip>Electrical**
- Equip>Environmental
- Equip>Human
- Equip>Hydraulic/Steam Systems
- Equip>Liquid Ingress
- Equip>Lubrication
- Equip>Machine Setup
- Equip>Mechanical
- Equip>Operation
- Equip>Pneumatic
- Equip>Process

Complete Work Order [X]

COMMENT: All repairs were made and product tested.

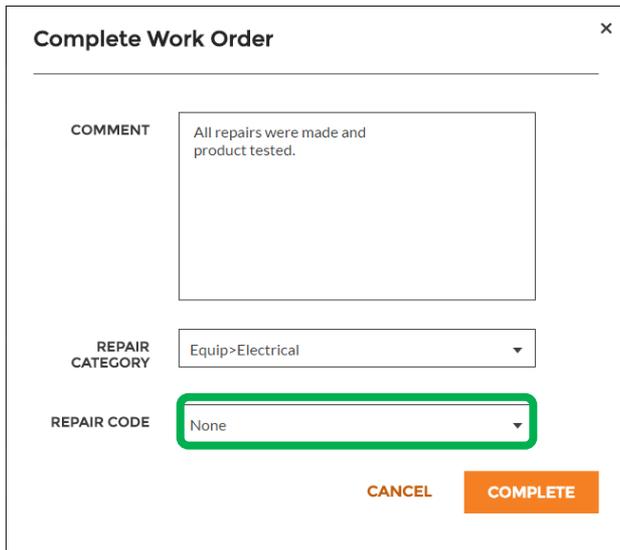
REPAIR CATEGORY: Equip>Electrical

REPAIR CODE: None

CANCEL COMPLETE

Repair Category and Repair Code

Then you will do the same for the
“REPAIR CODE”



Complete Work Order x

COMMENT
All repairs were made and product tested.

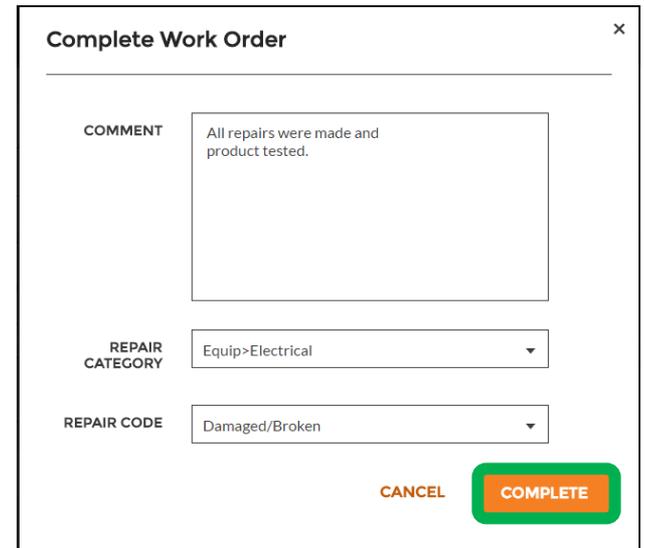
REPAIR CATEGORY
Equip>Electrical

REPAIR CODE
None

CANCEL **COMPLETE**

- Abnormal Temperature
- Arcing
- Battery Sulfation
- Cable Joint Failure
- Closed (Circuit)
- Coil/Solenoid Failure
- Damaged/Broken**
- Delamination/Exfoliation
- Dirt or Contamination
- Discharged
- Grounding/Earthing Problem
- Harmonic Distortion
- High Resistance
- Inaccurate Signal

And click “COMPLETE”



Complete Work Order x

COMMENT
All repairs were made and product tested.

REPAIR CATEGORY
Equip>Electrical

REPAIR CODE
Damaged/Broken

CANCEL **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 screenshot displays a chat window titled 'CUSTOMER'. The chat history includes the following messages:

- James Favreau has checked in from an unknown location (3:39 PM)
- CUSTOMER: Click **HERE** to indicate which pieces of equipment you worked on (4:47 PM)
- James Favreau has completed this work order from an unknown location (4:47 PM)
- PRO rated this work as Positive (5:05 PM)
- CUSTOMER: We rated this work as **Positive** 😊. Work performed and completed as agreed and within SLA. (5:05 PM)

The 'Positive' rating in the final customer message is highlighted with a green box. At the bottom of the chat window, there is a dropdown menu set to 'Cru', a text input field with the placeholder 'Type your message here', and an orange 'SEND' button.

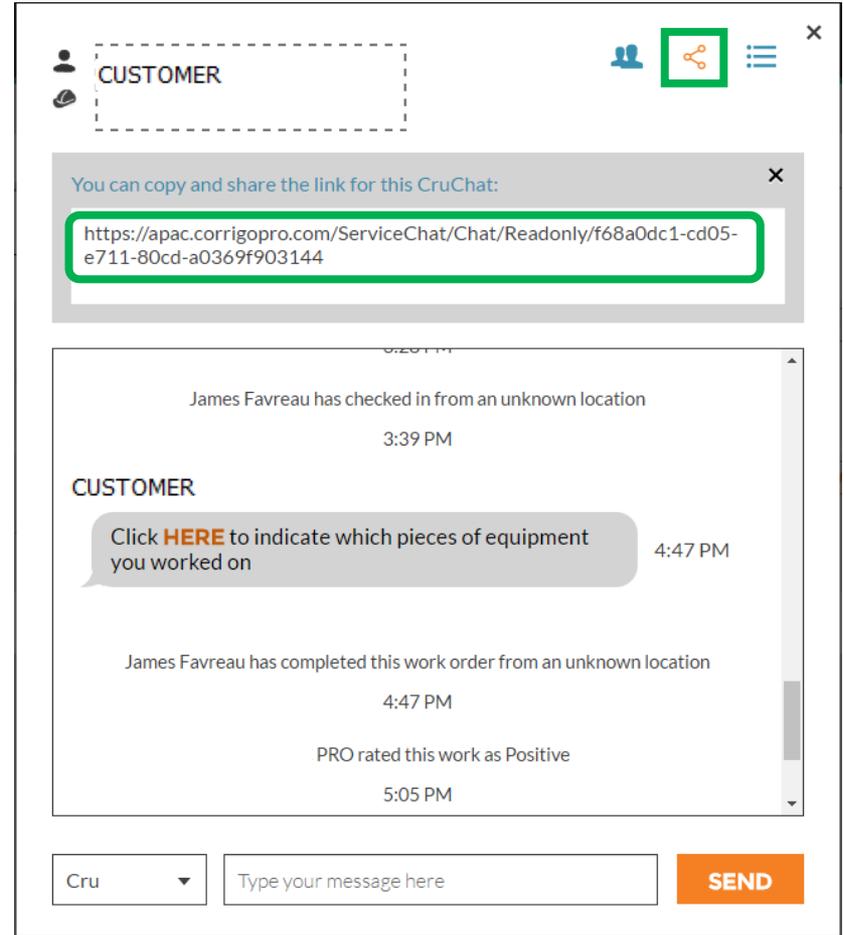
The CruChat Link

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



The screenshot displays the CruChat interface. At the top right, there is a link icon (a square with a share symbol) highlighted with a green box. Below it, a notification box states: "You can copy and share the link for this CruChat:" followed by a URL: <https://apac.corrigopro.com/ServiceChat/Chat/Readonly/f68a0dc1-cd05-e711-80cd-a0369f903144>. The chat history shows a customer message: "Click **HERE** to indicate which pieces of equipment you worked on" at 4:47 PM. Other messages include status updates from James Favreau and a PRO rating.

Actions and Filters

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

David's HVAC

CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

MY CORRIGO BILLING ACCOUNT

YOUR INVOICES NEED ATTENTION

- 32 ready to be invoiced WOs
- 27 draft invoices
- 0 disputed invoices

81 your average score

2 customers are connected to you

INTEGRATE YOUR WORK ORDER SYSTEM DIRECTLY TO corrigo

Powered by CORRIGO PRO DIRECT

CORRIGOPRO

WOs Awaiting Acceptance 42

WOs Overdue 78

Open Reactive WOs 37

Open PM/RM WOs 0

Waiting for WO Completion Det... 0

WOs BY STATUS (LAST 90 DAYS)

Waiting for Acceptance (1) Open (2)
Open: In Progress (1) Completed (6)

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

Waldo David at David's HVAC

Search Chats STATUS: Any WO STATE: Any COMPLETE BY: Any

APAC Demo

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

Please check out when you complete working or pause if you need a break

APAC Demo

WO# COR0084 OPEN: IN P

BULK ACTIONS
EXPORT
MOBILE USER INFO
MORE FILTERS

APAC Demo

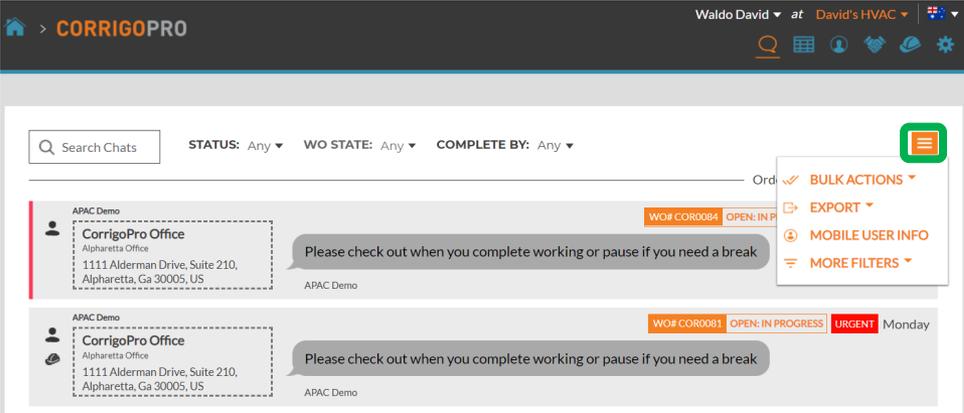
CorrigoPro Office
Alphaetta Office
1111 Alderman Drive, Suite 210,
Alphaetta, Ga 30005, US

Please check out when you complete working or pause if you need a break

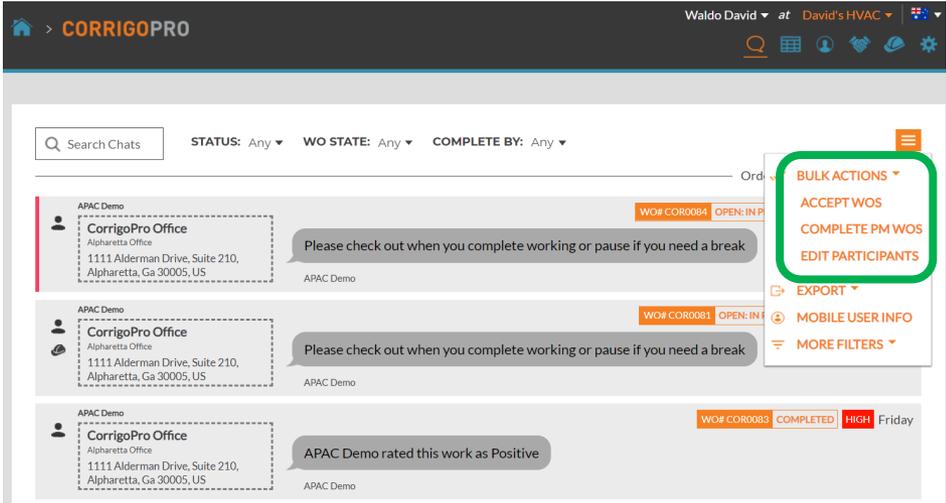
APAC Demo

WO# COR0081 OPEN: IN PROGRESS URGENT Monday

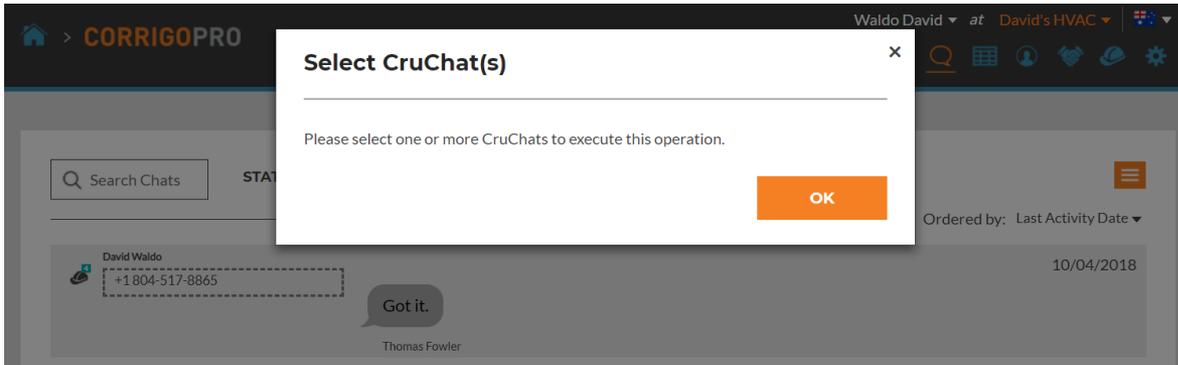
Actions and Filters



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



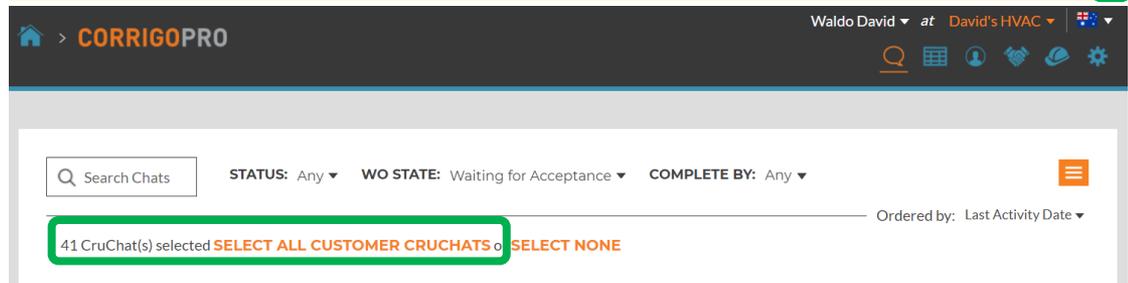
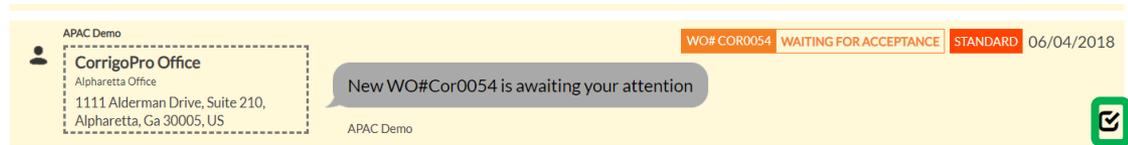
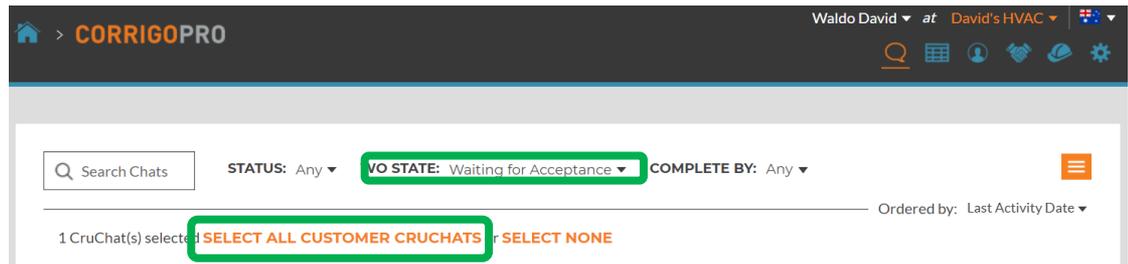
Actions and Filters: Bulk Accept



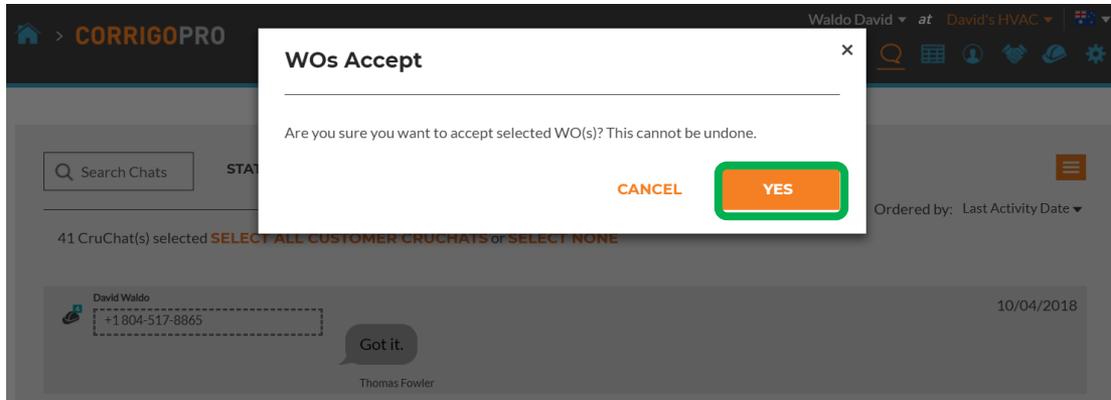
Work orders have been filtered by
“WAITING FOR ACCEPTANCE”

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

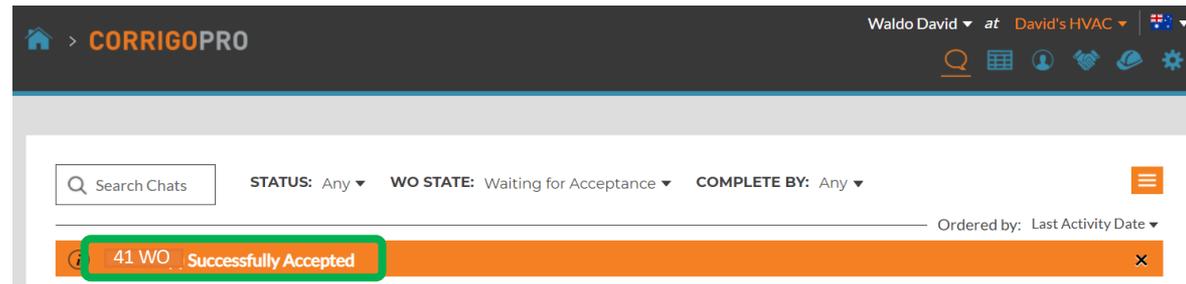
This will select all work orders that are
waiting to be accepted



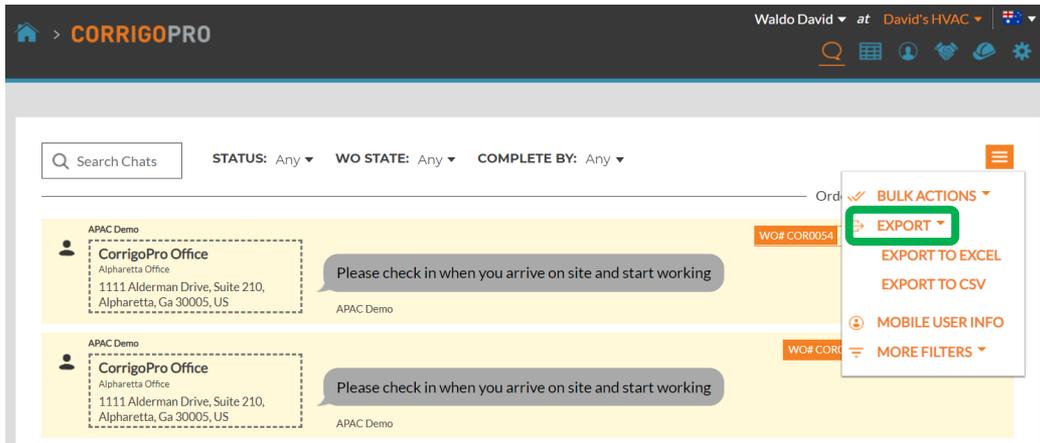
Actions and Filters: Bulk Accept



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

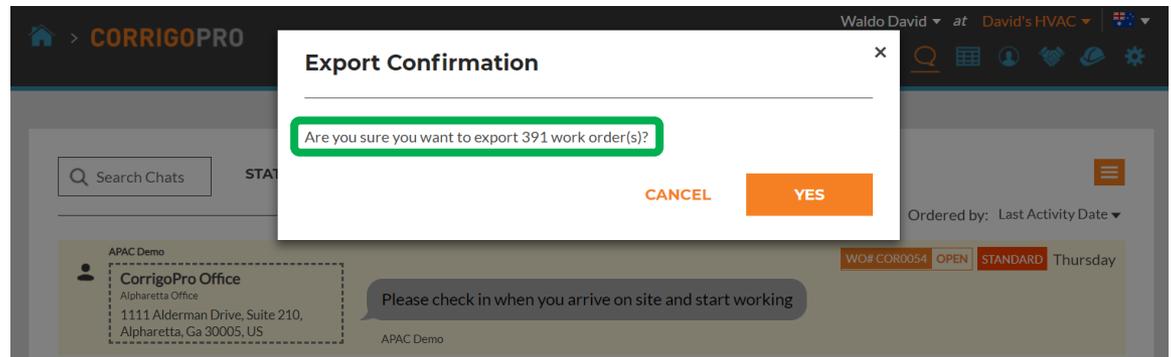


The “EXPORT” function provides the ability for the user to export work order data in Excel or CSV format

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 screenshot shows the CORRIGOPRO interface with a search bar and filter options. A dropdown menu is open over the first work order, highlighting the 'MOBILE USER INFO' option. The work order details are as follows:

Order ID	Status	Priority	Due Date
WO# EOHLOR001	WAITING FOR ACCEPTANCE		
WO# CORR0073	WAITING FOR ACCEPTANCE	URGENT	Thursday

The system displays the information for the connected mobile users

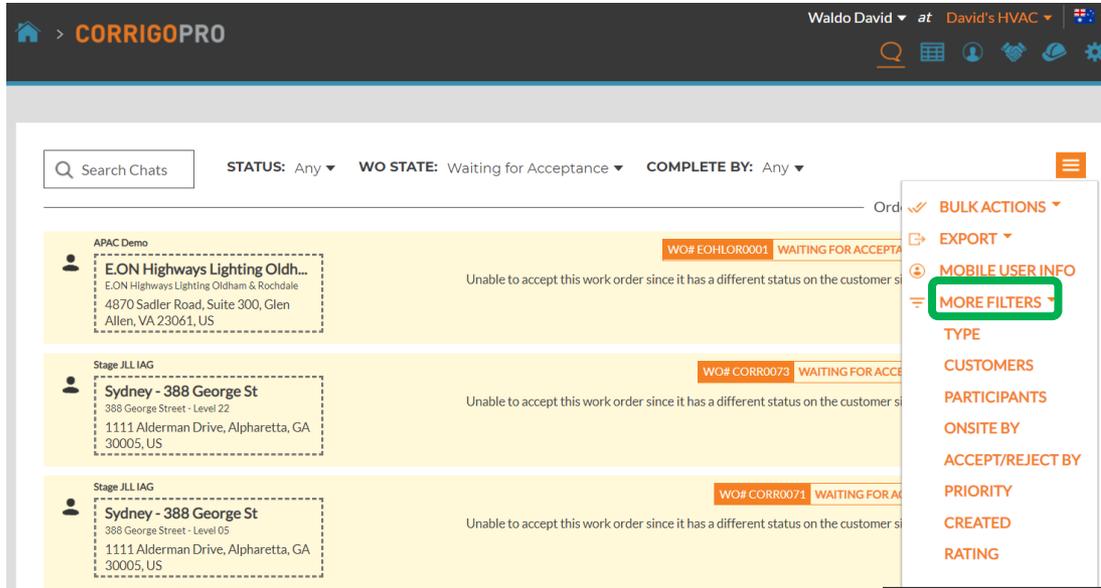
The screenshot shows the CORRIGOPRO interface with a 'Mobile User Info' modal window open. The modal displays the following information:

Your Desktop login is currently connected to the mobile user displayed below

Mobile User Name	David Waldo
Mobile User Phone #	+1 804-517-8865

The modal also includes an 'OK' button.

Actions and Filters: Filters

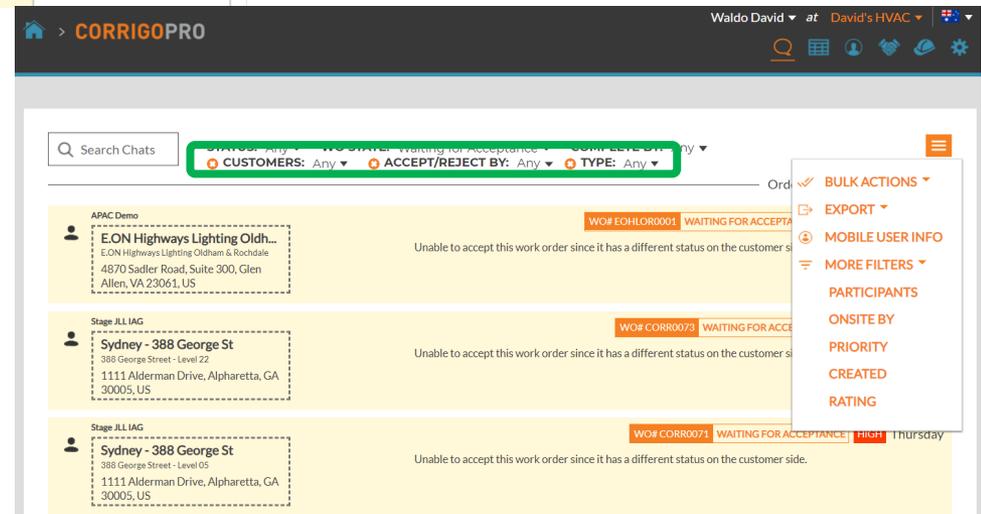


Clicking on “MORE FILTERS” allows the user to add filters to be used to provide additional details for the selected work orders

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

Waldo David at David's HVAC

Search Chats

STATUS: Any WO STATE: Waiting for Acceptance COMPLETE BY: Any

Ordered by: Last Activity Date

APAC Demo

WO# EOHLOR0001 WAITING FOR ACCEPTANCE SCHEDULED Thursday

E.ON Highways Lighting Oldh...
E.ON Highways Lighting Oldham & Rochdale
4870 Sadler Road, Suite 300, Glen
Allen, VA 23061, US

Unable to accept this work order since it has a different status on the customer side.

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

Waldo David at David's HVAC

Search Chats

STATUS: Any WO STATE: Any COMPLETE BY: Any

Waldo #2

WO NUMBER	PRIORITY	WO STATE	CUSTOMER	NTE	PROBLEM	INVOICE
<input type="checkbox"/> Cor0054	Standard	Open	APAC Demo	\$250.00 AUD	Frosting/Tinting/replace/Building/S... Repair & Maintenance;	New
<input type="checkbox"/> Cor0053	High	Open	APAC Demo	\$250.00 AUD	Glass Door - Interior/Needs to be replaced/Building/Structure Repair & Maintenance;	New
<input type="checkbox"/> Cor0052	High	Open	APAC Demo	\$250.00 AUD	Security Alarm Arming/Disarming/Needs to be replaced/Equipment;	New
<input type="checkbox"/> Cor0051	Urgent	Open	APAC Demo	\$500.00 AUD	UPS/Not working/Building/Structure Repair & Maintenance;	New
<input type="checkbox"/> Cor0050	Urgent	Open	APAC Demo	\$500.00 AUD	HVAC/Alarm in main heating room/Building/Structure Repair & Maintenance;	New
<input type="checkbox"/> Cor0049	High	Open	APAC Demo	\$500.00 AUD	Drainage/drain clogged left corner of the building/Building/Structure Repair & Maintenance;	New

Data Table: Selectable Data Categories

The screenshot displays the CORRIGOPRO web application interface. At the top, there is a navigation bar with a home icon and the text '> CORRIGOPRO'. On the right side of the top bar, the name 'Waldo' is visible. Below the navigation bar, there is a search bar labeled 'Search Chats' and three filter dropdowns: 'STATUS: Any', 'WO STATE: Any', and 'COMPLETE BY: Any'. The main content area features a data table with a dark header row containing the following columns: a checkbox, '/OICE DATE', 'COMPLETED', 'CHECKED IN', 'REPAIR CODE', 'REPAIR CATEG...', and 'PROS'. Below the header, there are six empty rows, each starting with a checkbox. To the right of the table is a vertical sidebar containing a list of 31 selectable data categories, each with a checkbox. The categories are: Priority (checked), Type (unchecked), WO State (checked), Customer (checked), On Site By (unchecked), Complete By (unchecked), Created (unchecked), Nte (checked), Problem (checked), Is Warranty (unchecked), Scheduled Start (unchecked), Pte (unchecked), Requested By (unchecked), Service Location (unchecked), Branch (unchecked), Invoice Status (checked), Invoice Date (checked), Invoice Number (unchecked), Invoice Total (unchecked), Completed (checked), Checked In (checked), Repair Code (checked), and Repair Category (checked). At the bottom of the sidebar, there is a 'Columns' button with a right-pointing arrow, which is highlighted with a green box. A dropdown menu is open next to the 'Columns' button, showing 'Sort Ascending' (with an up arrow) and 'Sort Descending' (with a down arrow). The 'Columns' button is also highlighted with a green box.

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

The screenshot shows the CORRIGOPRO interface with a data table. The table has columns for WO NUMBER, PRIORITY, WO STATE, CUSTOMER, NTE, PRO, and INVOICE. A context menu is open over the 'Waldo #2' column header, showing options: Waldo, Waldo #2, Save, and Delete. The table contains three rows of data:

WO NUMBER	PRIORITY	WO STATE	CUSTOMER	NTE	PRO	INVOICE
Cor0054	Standard	Open	APAC Demo	\$250.00 AUD	Frost Repair & maintenance;	New
Cor0053	High	Open	APAC Demo	\$250.00 AUD	Glass Door - Interior/Needs to be replaced/Building/Structure Repair & Maintenance;	New
Cor0052	High	Open	APAC Demo	\$250.00 AUD	Security Alarm Arming/Disarming/Needs to be replaced/Equipment;	New

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

The screenshot shows the 'Save View As' dialog box in the CORRIGOPRO interface. The dialog has a 'Name' field with the placeholder text 'Specify Unique View Name' and a 'Shared' checkbox that is checked. There are 'SAVE' and 'CANCEL' buttons at the bottom of the dialog.

Settings: Notifications / Advanced

Waldo David at David's HVAC

Settings NOTIFICATIONS ADVANCED

You can receive e-mail notifications about activities in your branches when you are offline. You may unsubscribe or re-subscribe at any time.

POP-UP NOTIFICATIONS

Display pop-up notifications about changes in CruChats **OFF**

EMAIL NOTIFICATIONS

- New Reactive WOs **ON**
- Unread CruChats **OFF**
- Quote Approval/Rejection **ON**
- WO Recall **OFF**
- New PM/RM WOs **OFF**
- Negative Score Received **OFF**
- Invoice Status Changed **OFF**
- Message from a Customer **OFF**
- WO is Waiting for Acceptance **OFF**
- WO Overdue Warning **ON**
- Invoice Overdue Warning **OFF**
- On Site By Warning **OFF**

Click on the "Settings" icon to view Notifications
User Notifications are toggled on or off using the toggle switch to the right of each notification
Notification are set for individual user only

SAVE

Settings: Advanced

Settings

NOTIFICATIONS ADVANCED

FINANCIAL

Do not show invoicing info on CruChats *i* OFF

Do not show invoicing info to CruMember users *i* ON

Do not show NTE to CruMember users *i* ON

WORK ORDER FLOW

Capture customer signatures *i* ON

SAVE

Click on the “Settings” icon
Click on “ADVANCED”

The option to show financial information
Users can toggled on or off using the toggle
switch to the right of each option

Toggling “Capture customer signature” will
enable signature capture functionality all
customer accounts

Click SAVE to save all changes

Questions

Contact Corrigo via phone or online:

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