Managing Work Orders with the CorrigoPro Mobile App

Life of a work order – Mobile

During this tutorial, we will cover the CorrigoPro Mobile App

# CorrigoPro Mobile App: Accessing Your Work Orders

Install the CorrigoPro app on your device

Tap to open the app

Your Crus will appear on the first screen

Any Cru that has unread CruChats will have a red bookmark icon on the right

Tap on the desired Cru to access all related CruChats
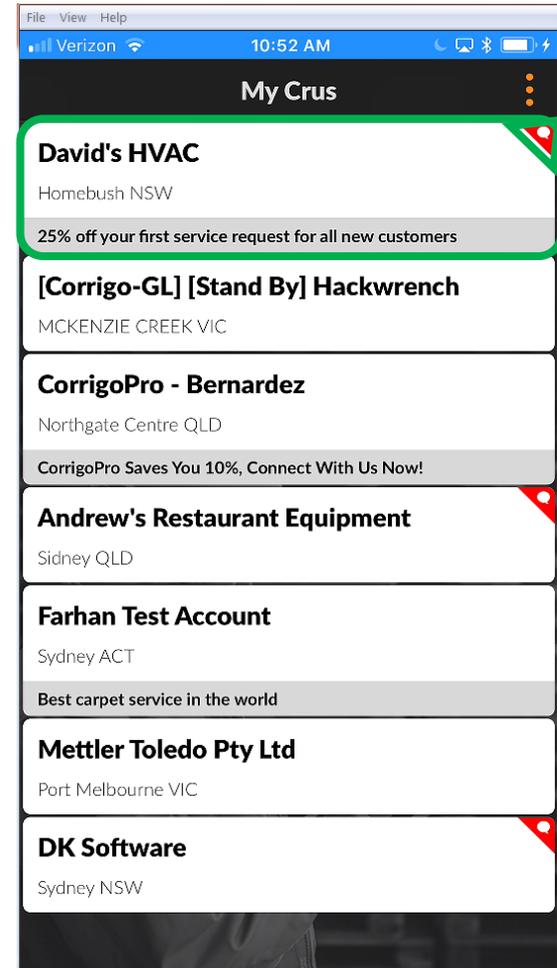
CorrigoPro Mobile App: Accessing Your Work Orders
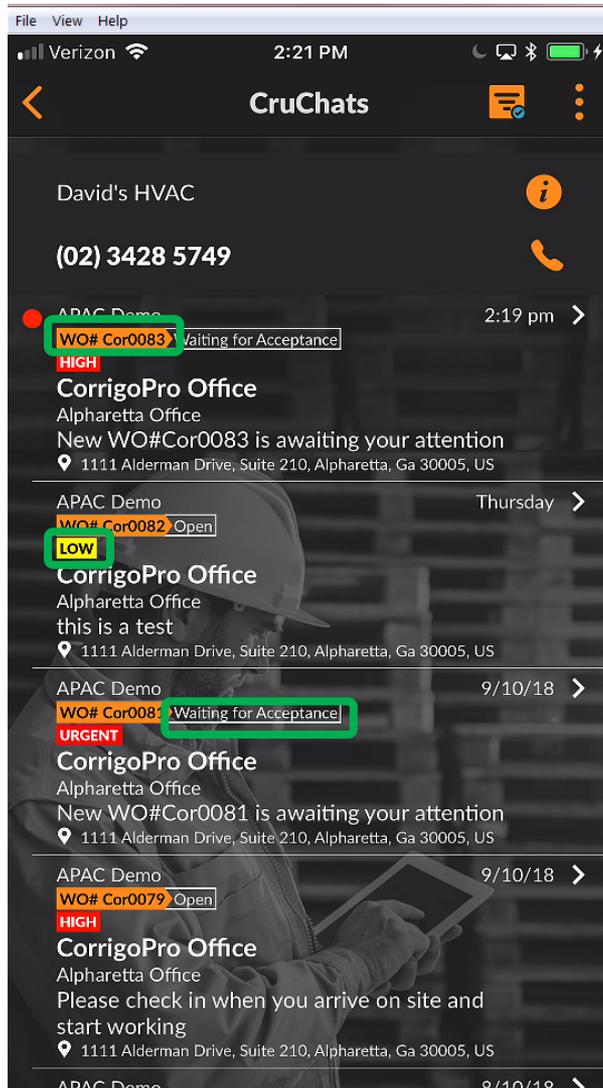
CruChats with work orders attached will show work order number, priority indicator, and work order status

Unopened or unread CruChats will have a red dot to the left

Tap on the phone screen to open the work order
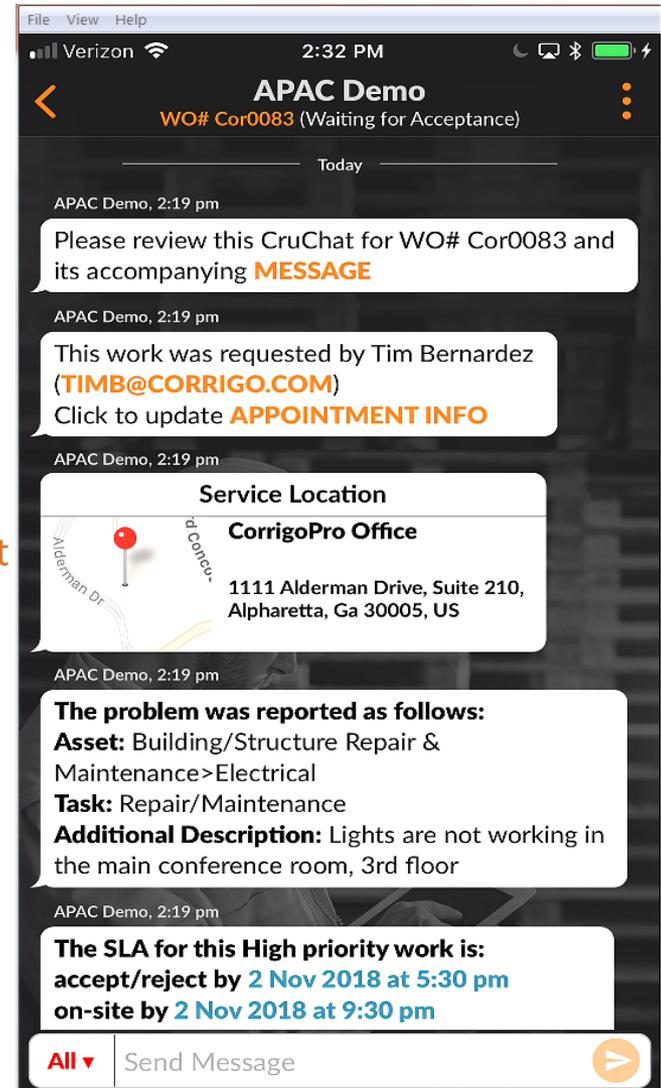
Reviewing a New Work Order Message
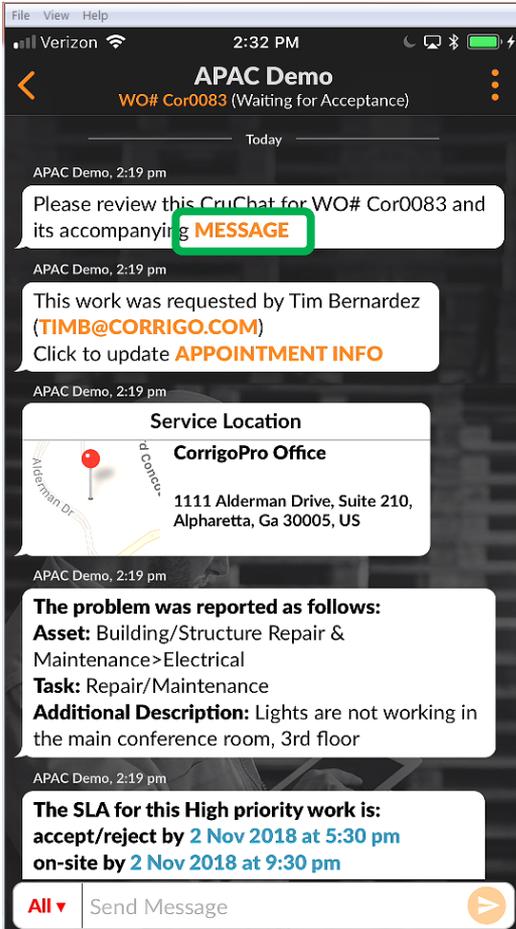
All work order details will be displayed within the CruChat

Start by tapping on the orange "Message" link

The message window will open and display customer contact information as well as the issue

Scroll up or down to view the work order
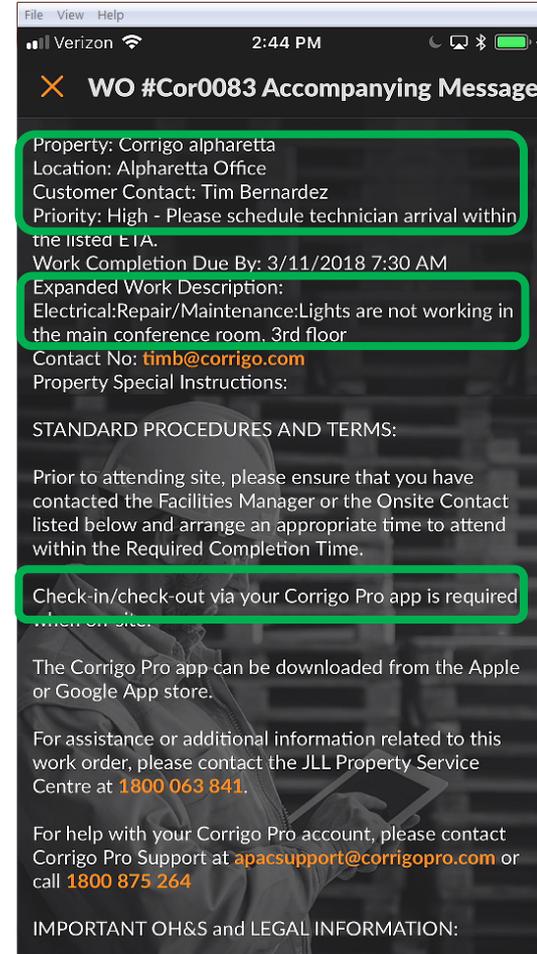
Tap "Close" to return to the CruChat
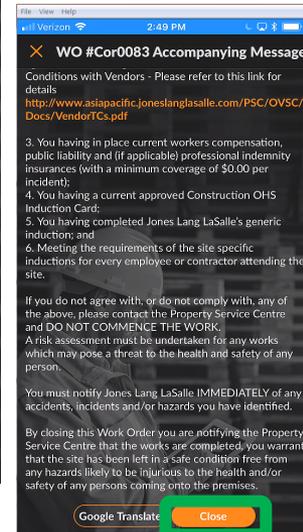
Site Contact and Service Location
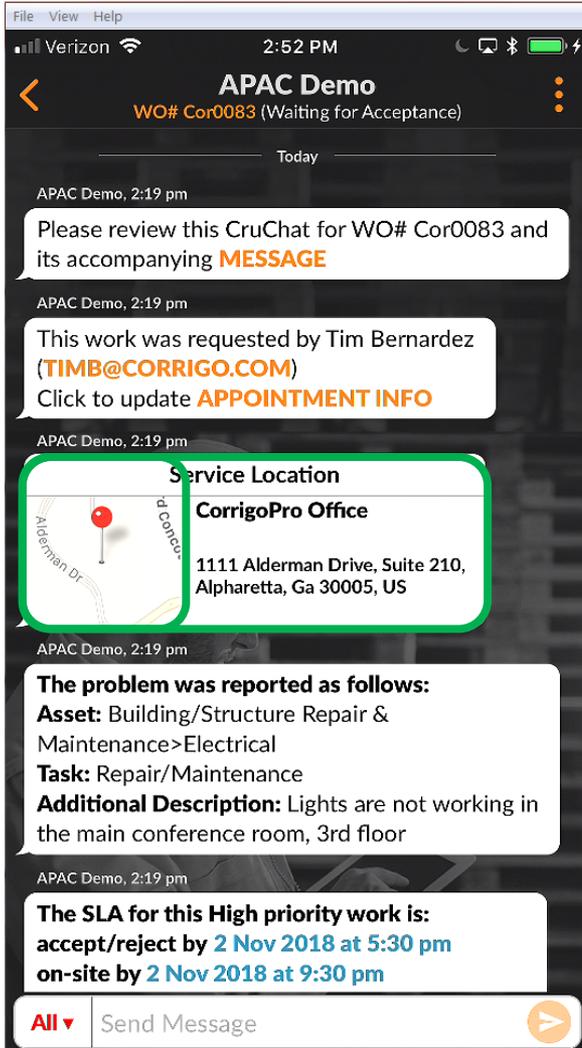
Next you will find the customer's site contact

You will also find the service location with the physical address and an interactive map link

Click on the map link to open the native mapping application

Click on the navigation icon for site directions
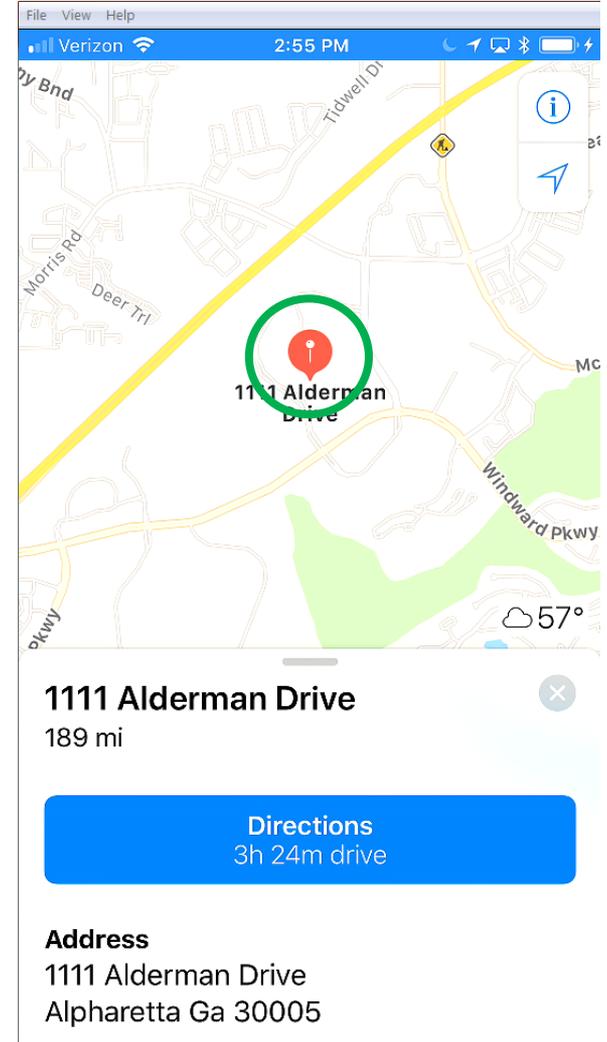
The Issue and SLA

The next item you will see in the work order CruChat is the Problem

Here you will find a brief description of the reported issue

You will also see the Priority/Service Level Agreement (SLA)

Be aware that your customer will rate you on your ability to meet the SLA timeframes
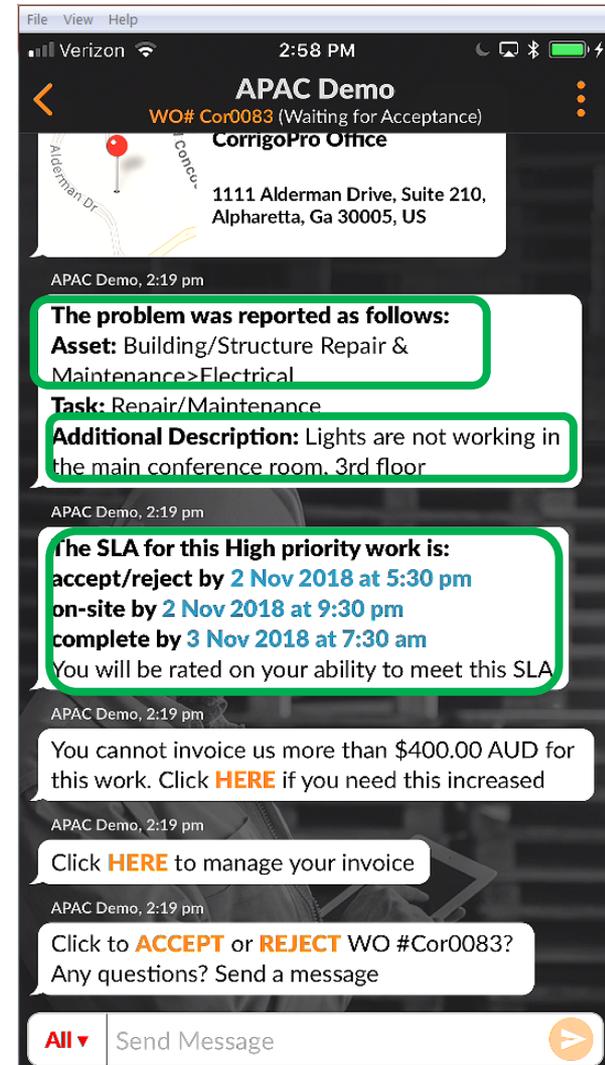
The NTE and Submitting a Quote
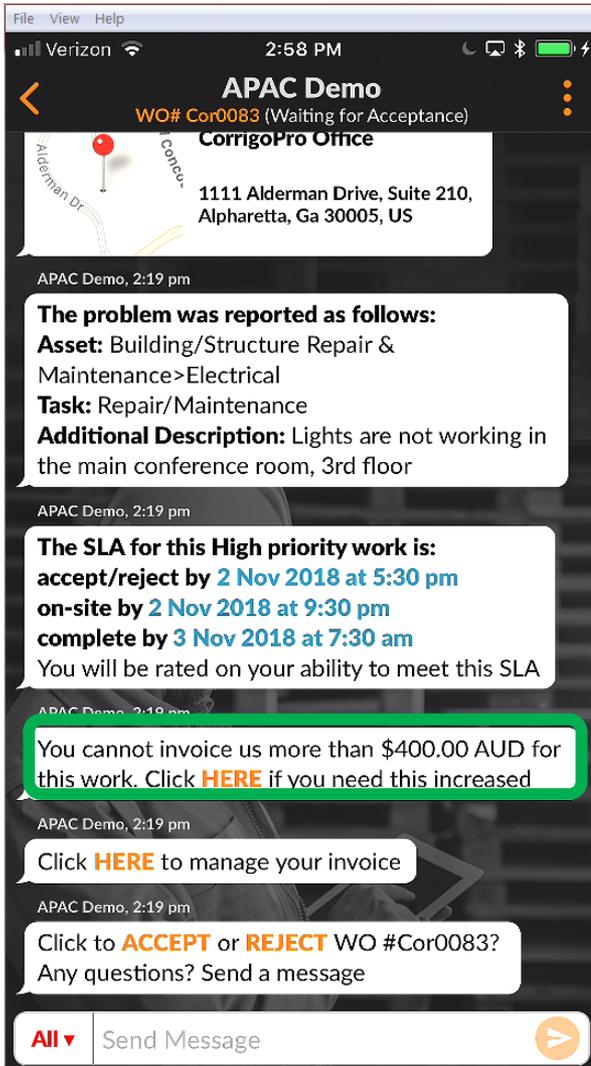
Next is NTE: Not To Exceed amount for the work order which is determined by your customer

Tap the orange "here" link to request increase in NTE

"Submit Quote" window will appear

Enter the quote amount for the requested service

Enter in a note justifying an increase to the NTE

Tap "Submit"
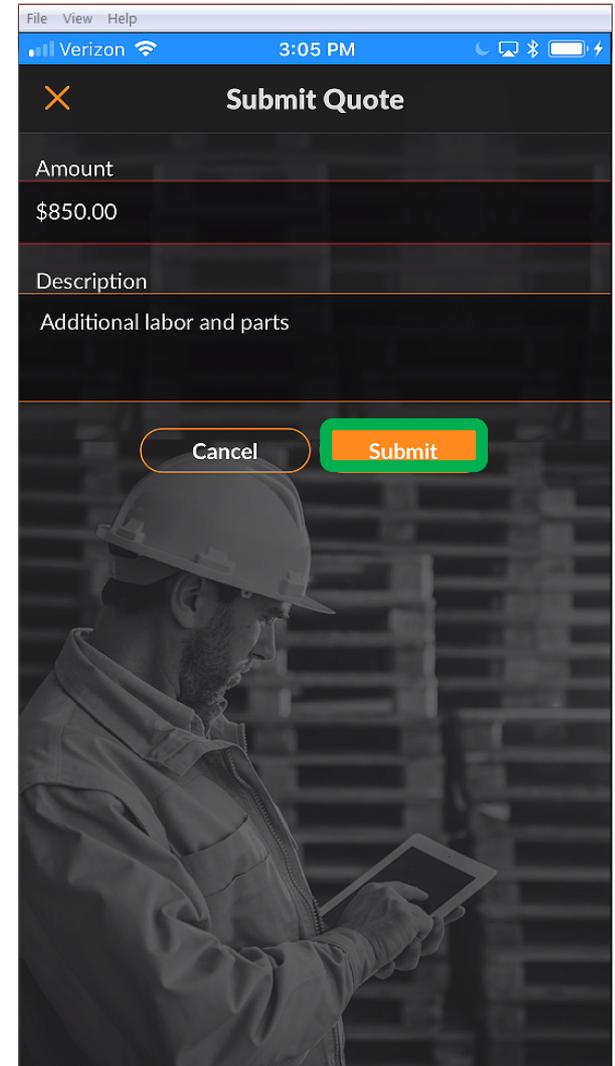
Quote Approved and the New NTE
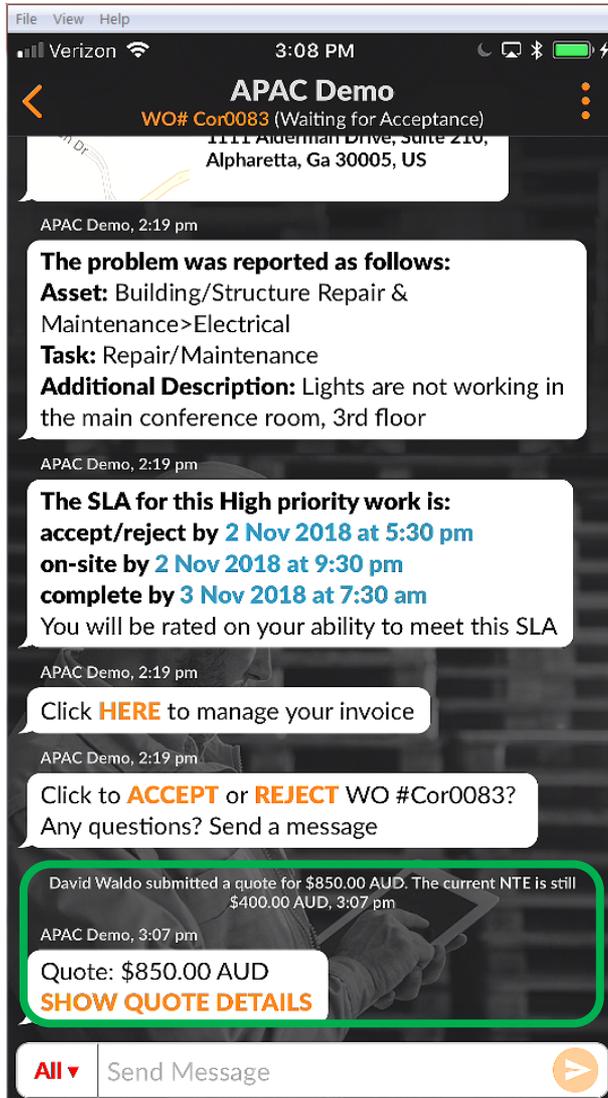
The work order is flagged in the customer portal

CruChat will show the quote amount and provide a link to the quote details

In this example, the customer has approved the quote

The quote approval is noted and timestamped in the CruChat

NTE is updated in the work order
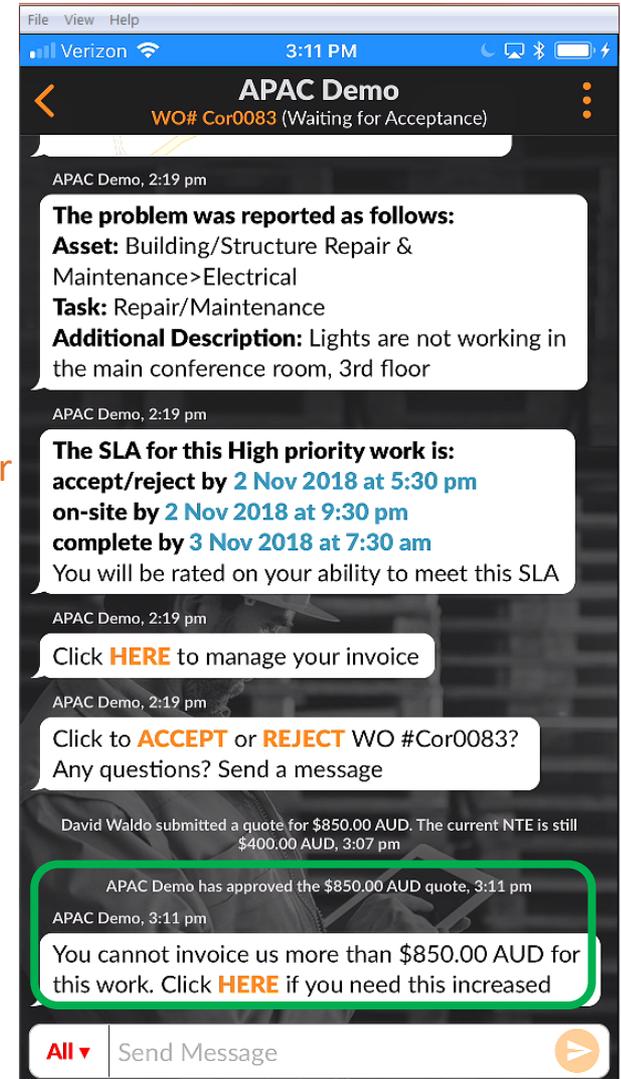
Accepting a Work Order
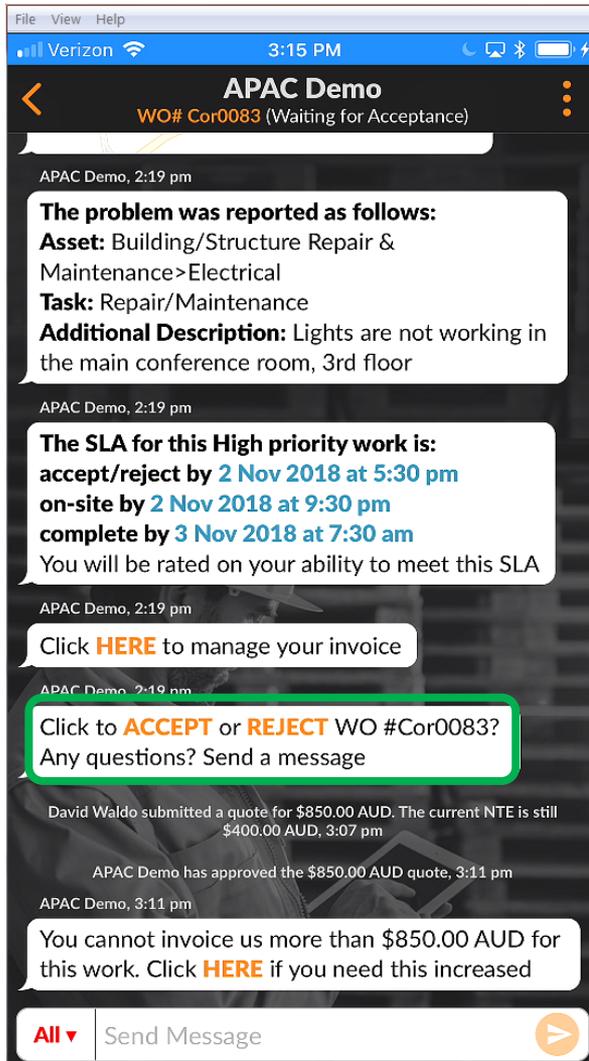
Now let's "accept" or "reject" the work order

Tap on the appropriate action

Tap on "accept" to accept a work order or "reject" to reject a work order

The action is timestamped in the CruChat, see picture to the right

Customer will be notified that their work order has been accepted

If the work order is accepted, a new action to "check in" and begin the work will appear
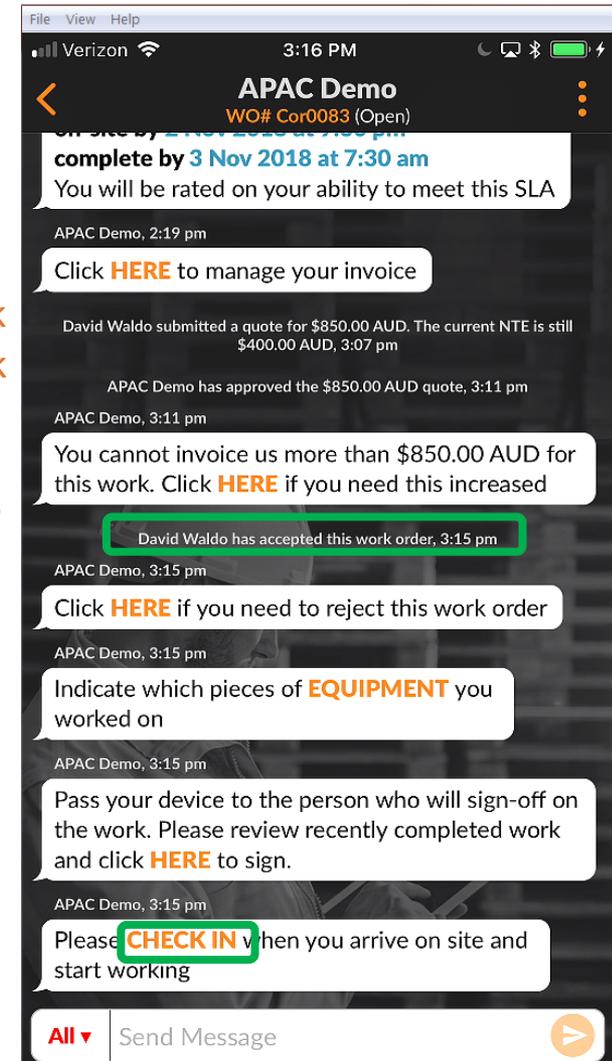
Rejecting an Accepted Work Order
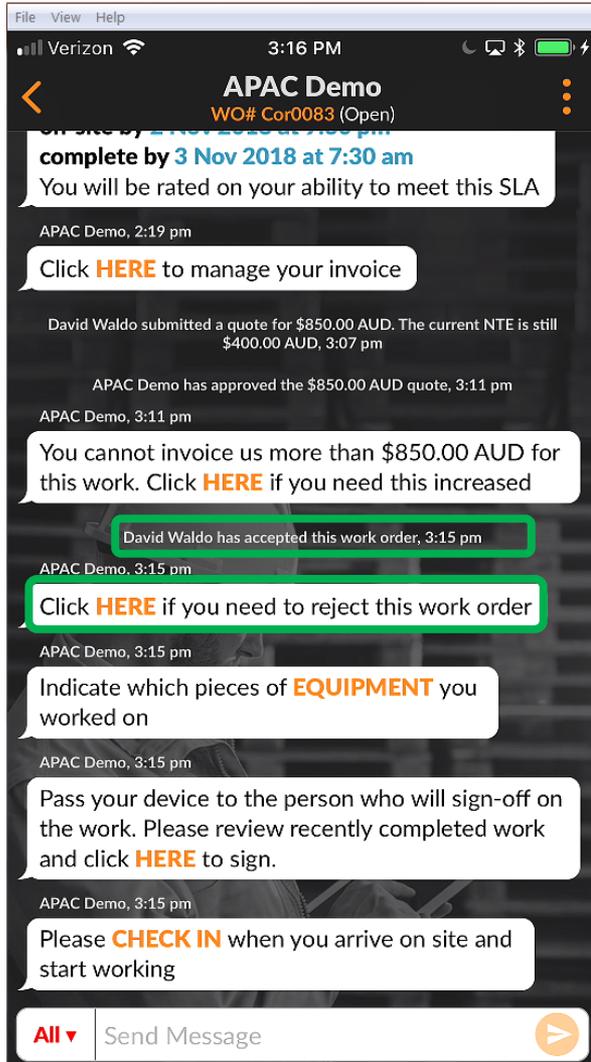
A work order can be rejected after it is accepted

Click on the orange "HERE" if you need to reject this work order

A reason for rejecting the work is required or the system will not let you reject the work order

Type in your reason for rejecting the work order an tap "Reject"
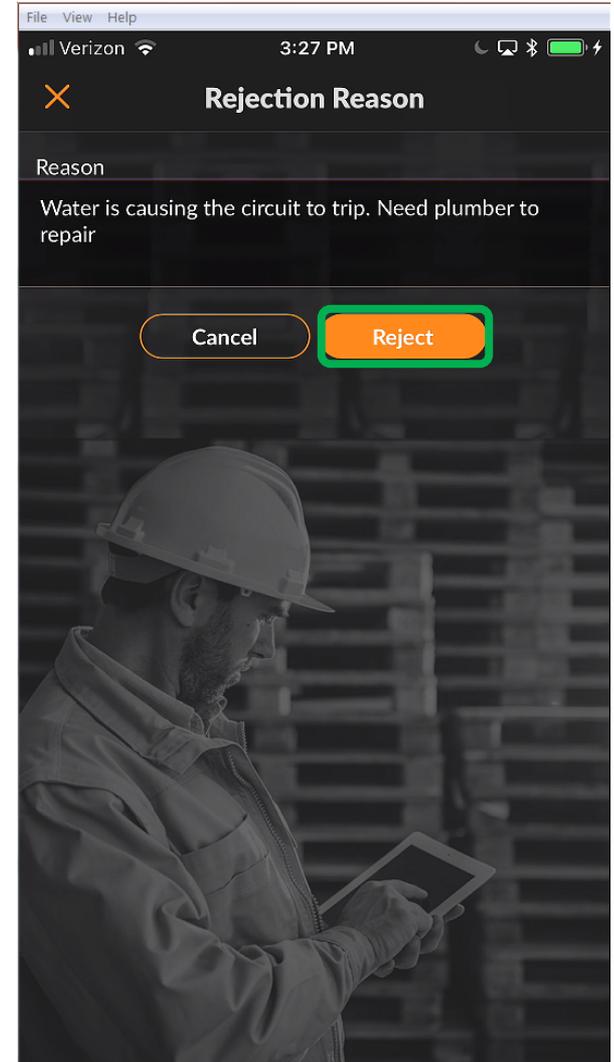
Checking In and Starting a Work Order
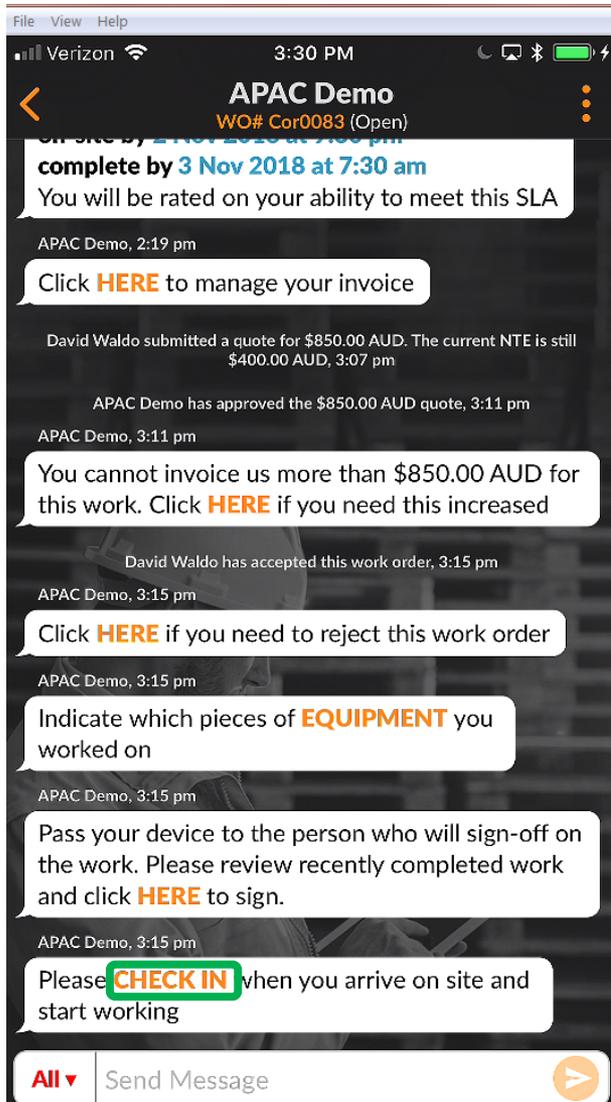
When the work order is accepted, desktop user, or the assigned Sub or CruMember, will be required to check in to begin the work

Once on site, tap the "check in" link to start the work order

If the user is not within close proximity to the work order location when checking in, they will be prompted to confirm and check-in

To continue, tap "Accept"
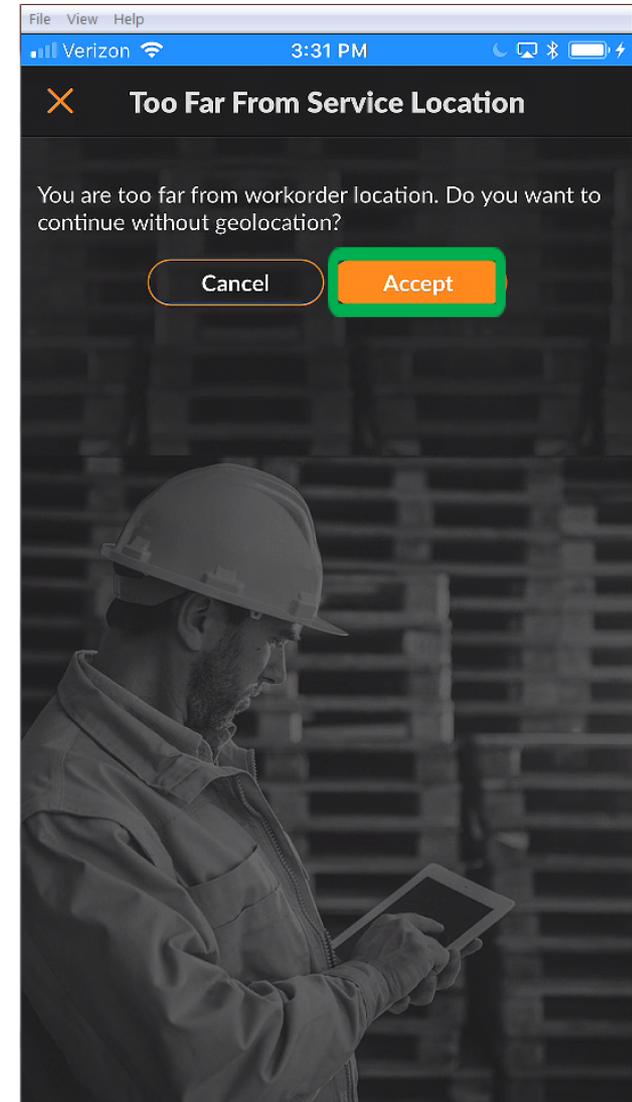
Start a Work Order using IVR
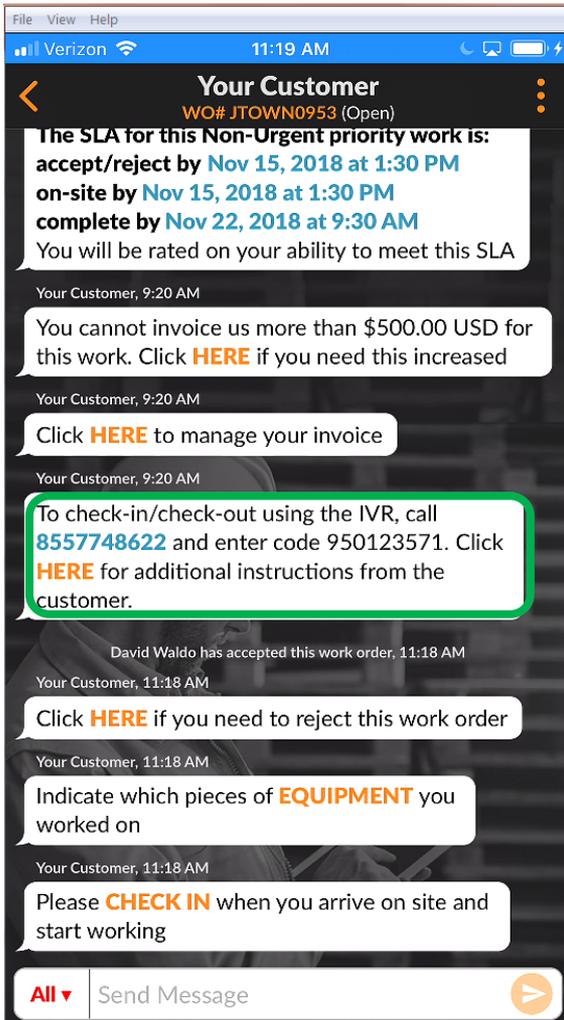
Checking in and out using the mobile app is the preferred method

If a customer subscribes to IVR the check-in / check-out IVR details will be displayed in the mobile app as shown to the left

To check-in or check-out call the phone number provided in the work order, enter in the IVR code and follow the prompts

This process must be completed when checking in, checking out or pausing a work order if leaving temporarily
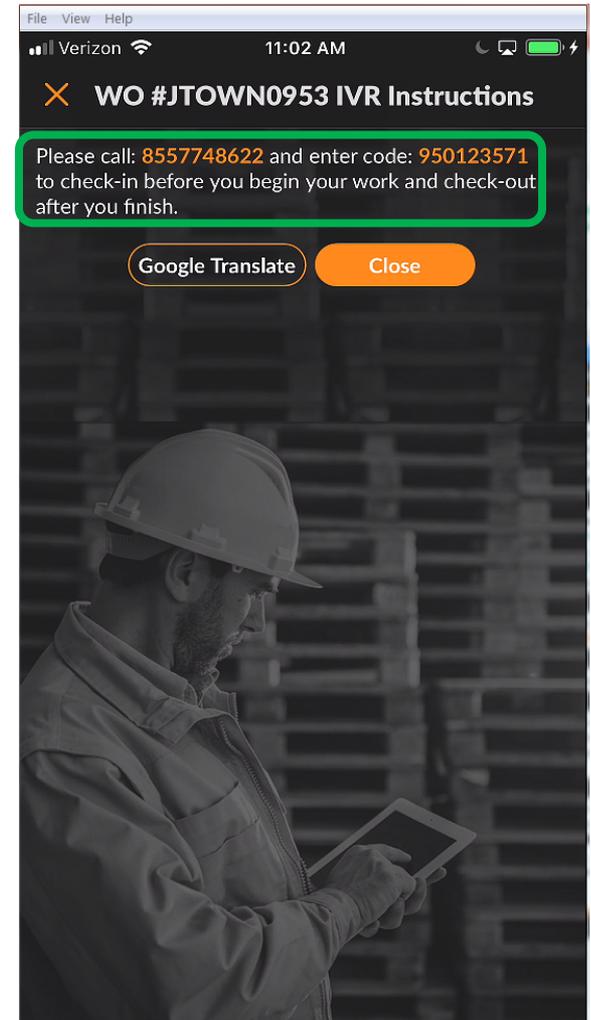
Pausing a Work Order
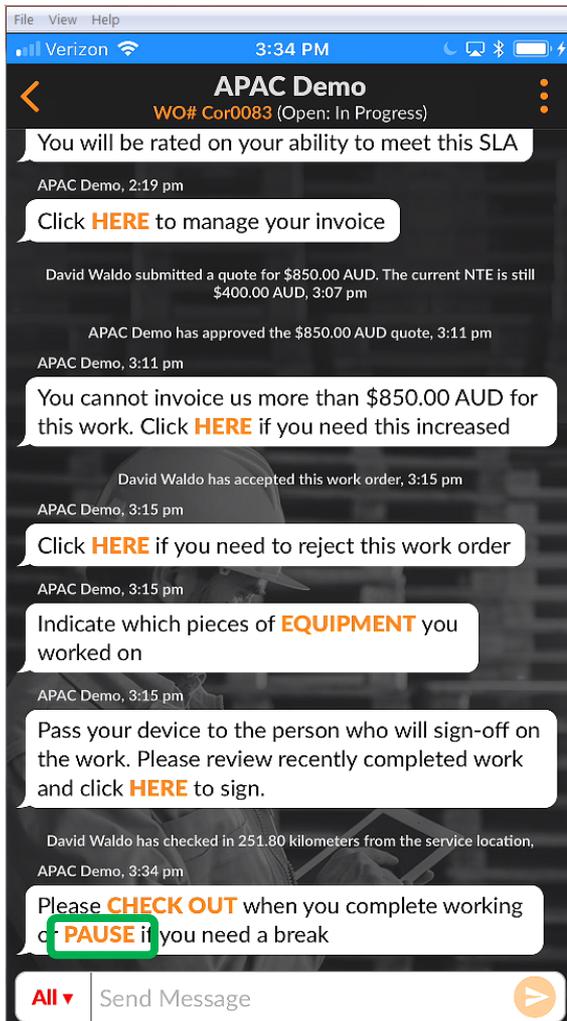
Check In is time stamped in the CruChat

If you need to leave the jobsite, user should "pause" the work order

Tap "PAUSE`" to stop the work order

Pause activity is time stamped in the CruChat

To re-start the work order, tap "CHECK IN"
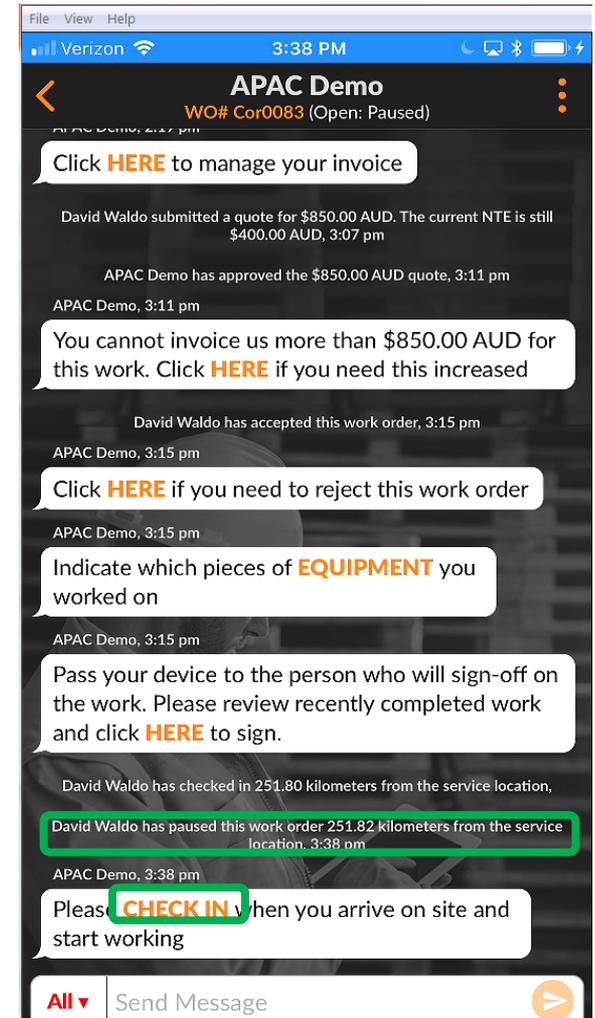
Checking out and Complete a Work Order
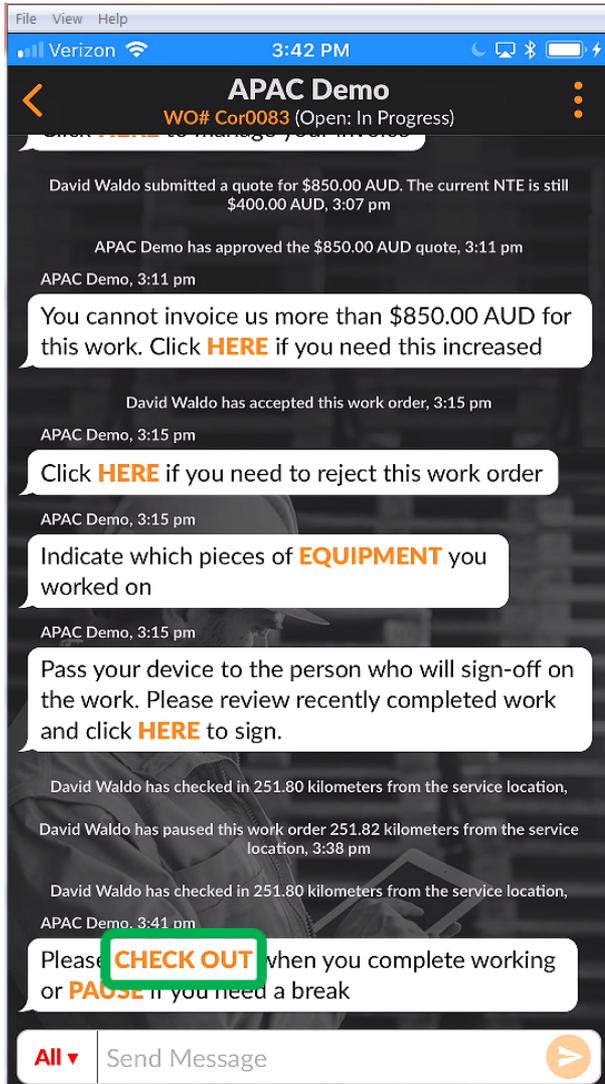
To complete a work order tap "check out"

The "Complete Work Order" window will open

Enter detailed comments about the work that was done

The more details on the work completed the better
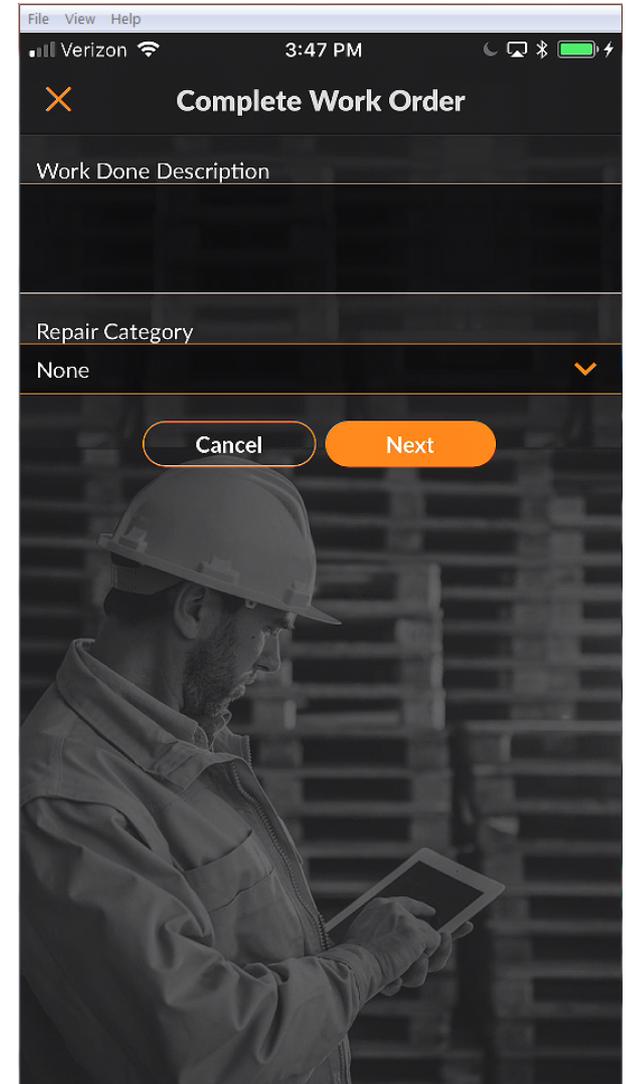
Checking out and Completing a Work Order

After entering your comments, select a "Repair Category" by tapping and accessing a scrollable repair category list
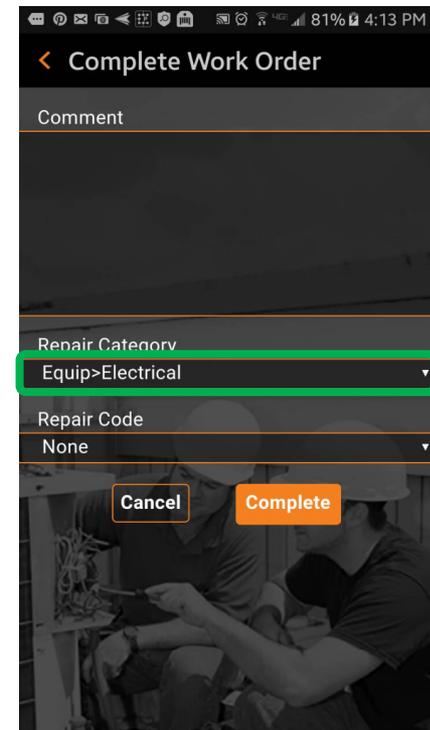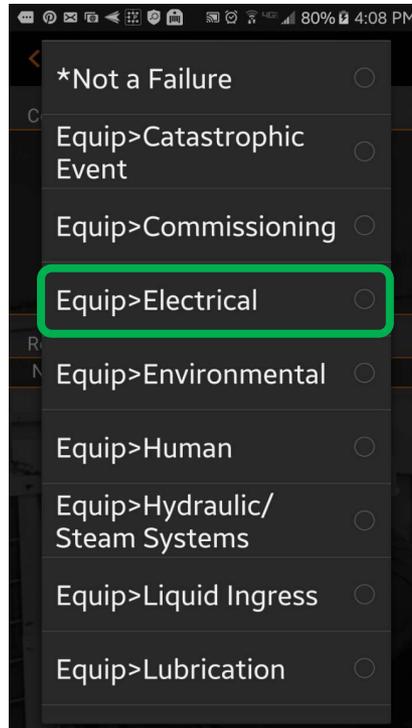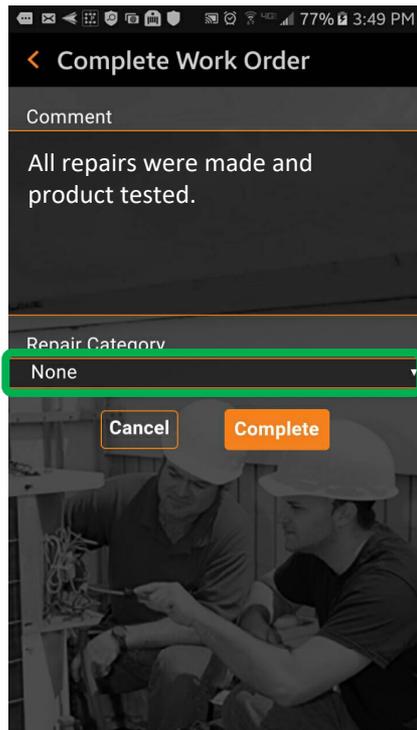
Checking out to Complete a Work Order

Perform the same steps to select the appropriate "Repair Code"
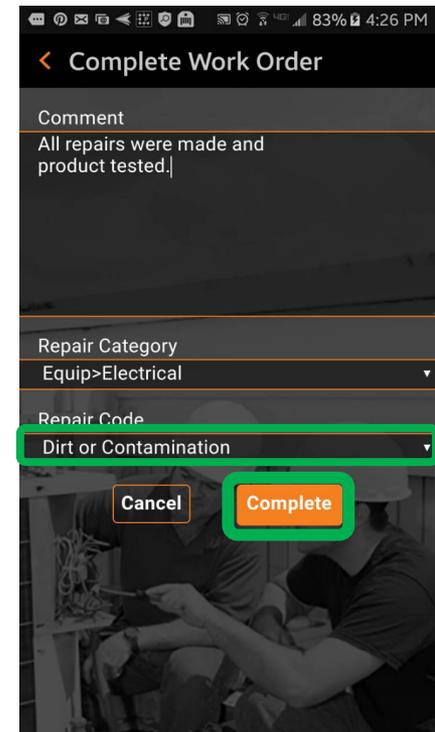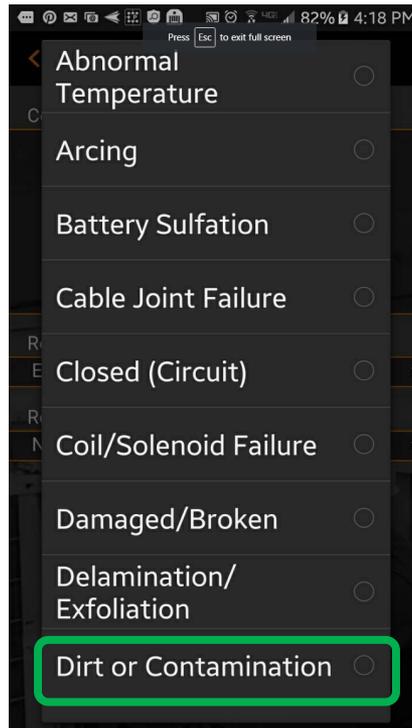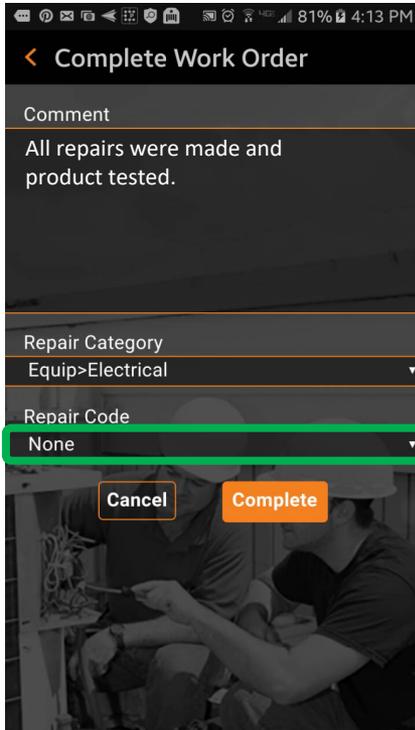
Once the Repair Category and Code are selected, tap "Complete"

Check out to Complete a Work Order

A CruChat timestamp will be added and the customer will be alerted that the work order is complete

If needed a work order can be reopened by clicking on the "HERE" to re-open this work order

To adjust the equipment worked on click on "EQUIPMENT" this will allow you to add pieces of equipment to the work order.
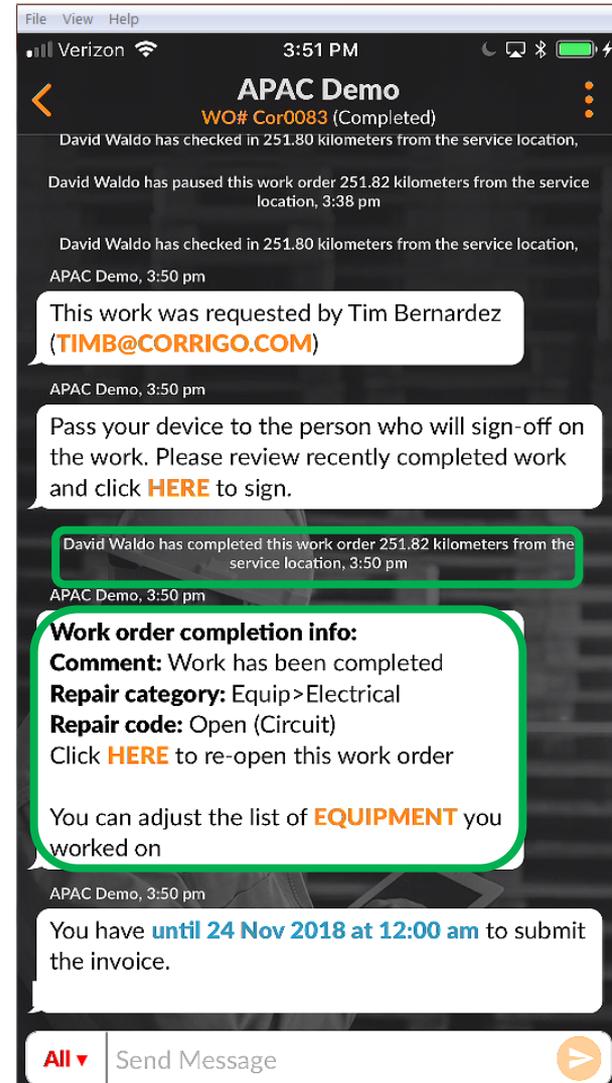
Collecting Customer Signature
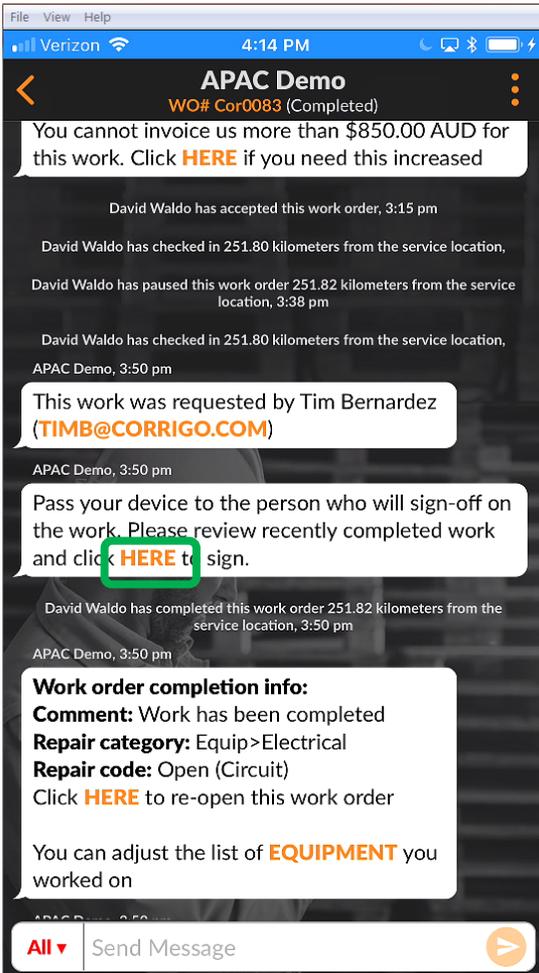
Customer signature functionality must be turned on in the desktop settings to be available on the mobile app

To capture a customer's signature Click on "HERE" to sign

WO Signature screen will appear

Hand your device to your customer and have them sign on your device

Click "Accept"
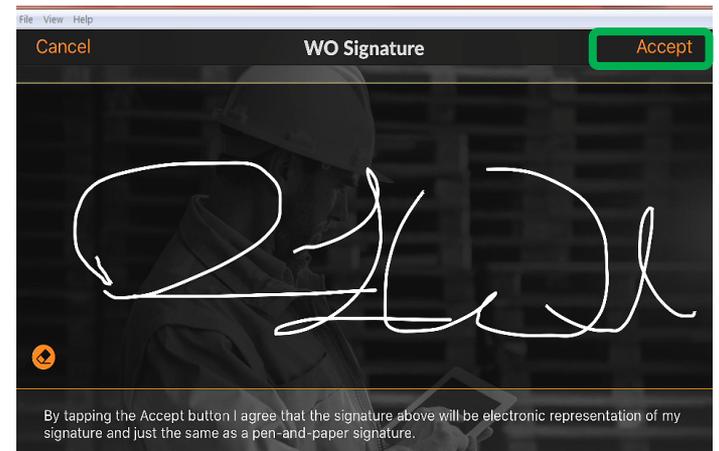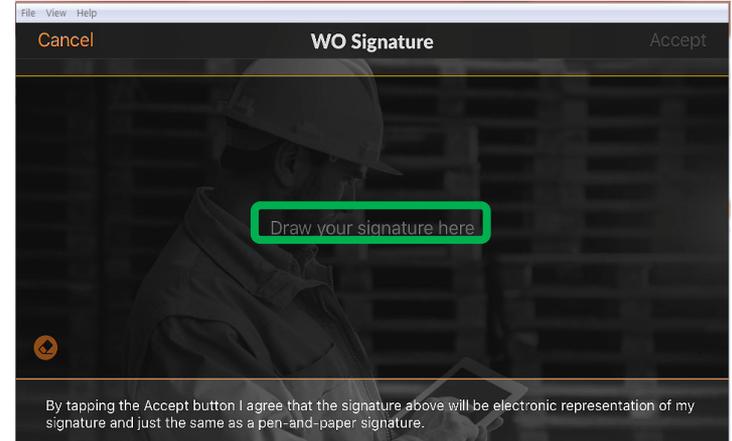
Collecting Customer Signature
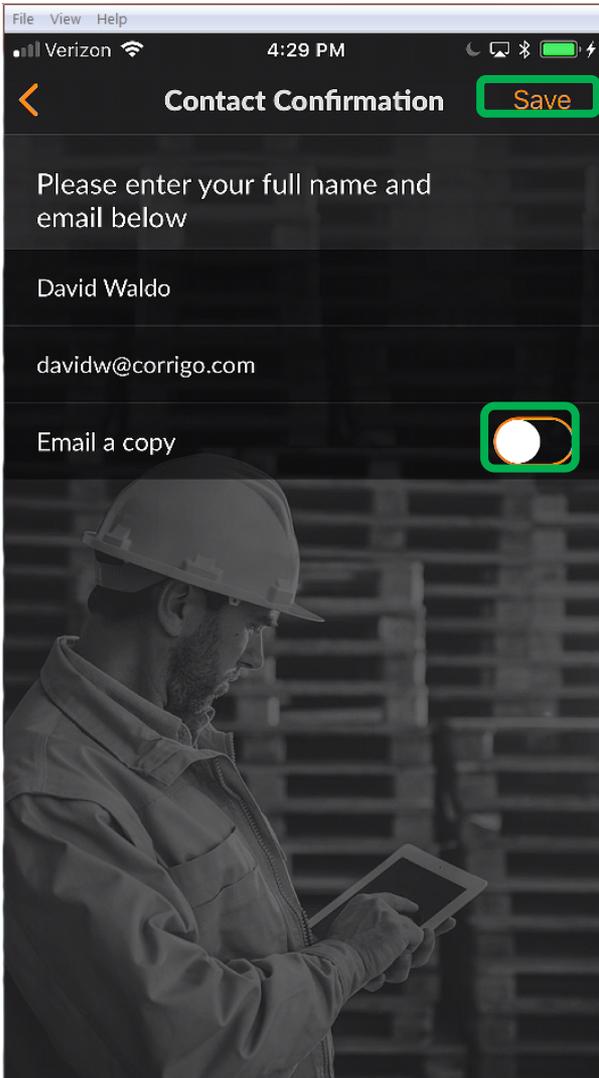
Customer name and email is required to save the signature

Email copy is an option for the customer to receive an email of the work order with the signature included

Toggle switch to the right to email work order

Click "Save" to complete the process

Signature will be displayed in the CruChat on the mobile app
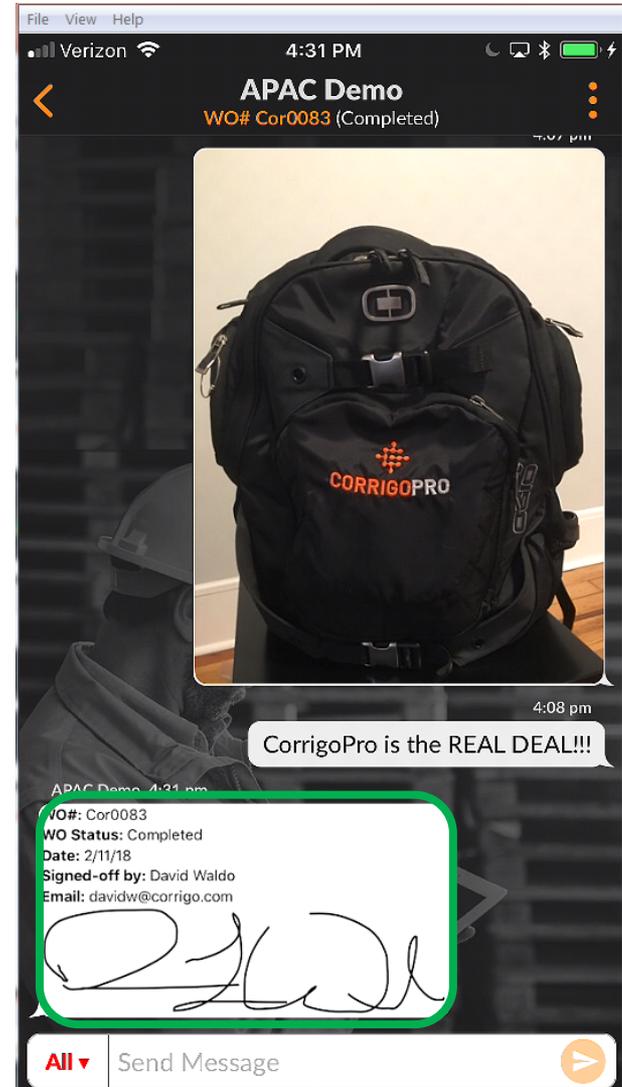
CorrigoPro Mobile App: Attaching a Picture

You can attach a picture to any CruChat

Tap the 3 dots to open the drop down

Tap "Camera" to take a new picture or "Photo Library" to select an existing picture from your device

Take or select the picture you wish to share

Attaching pictures both before and after the work is completed is highly recommended
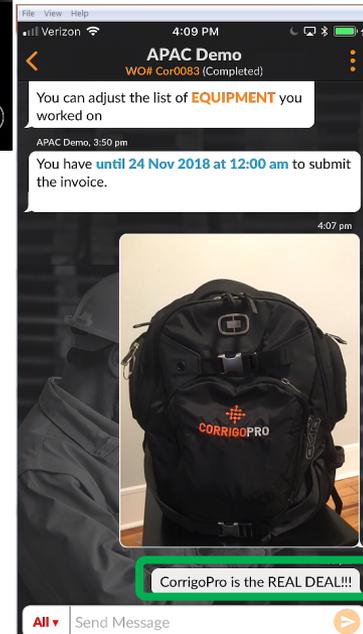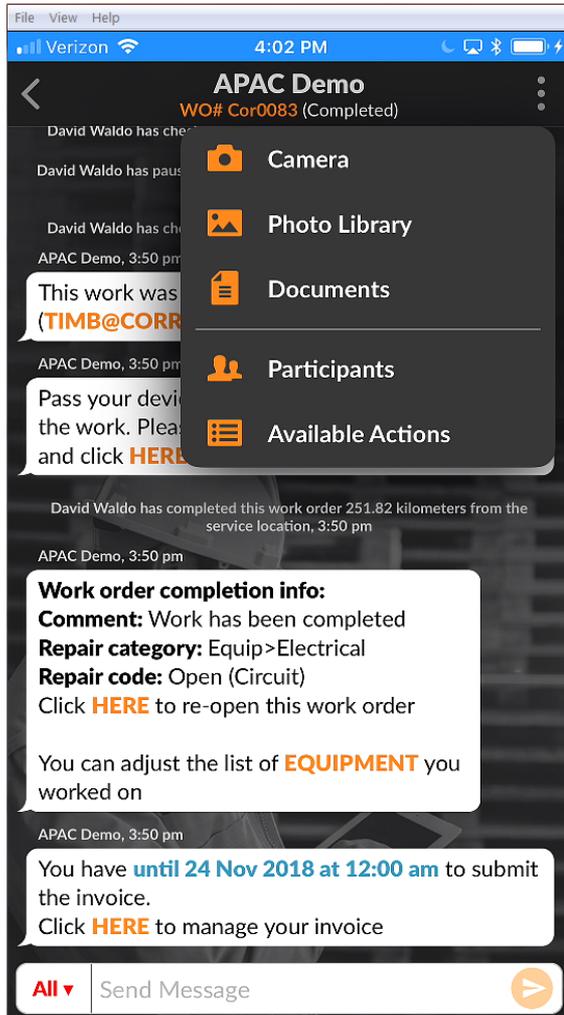
Verifying and Rating the Work

When you have checked out and completed the work order, the customer will receive a notification

Customers rate your work during the verification process

Rating will appear, with comments, in the CruChat verification message

If your customer requires verification, you will only be able to submit an invoice when the verification is completed
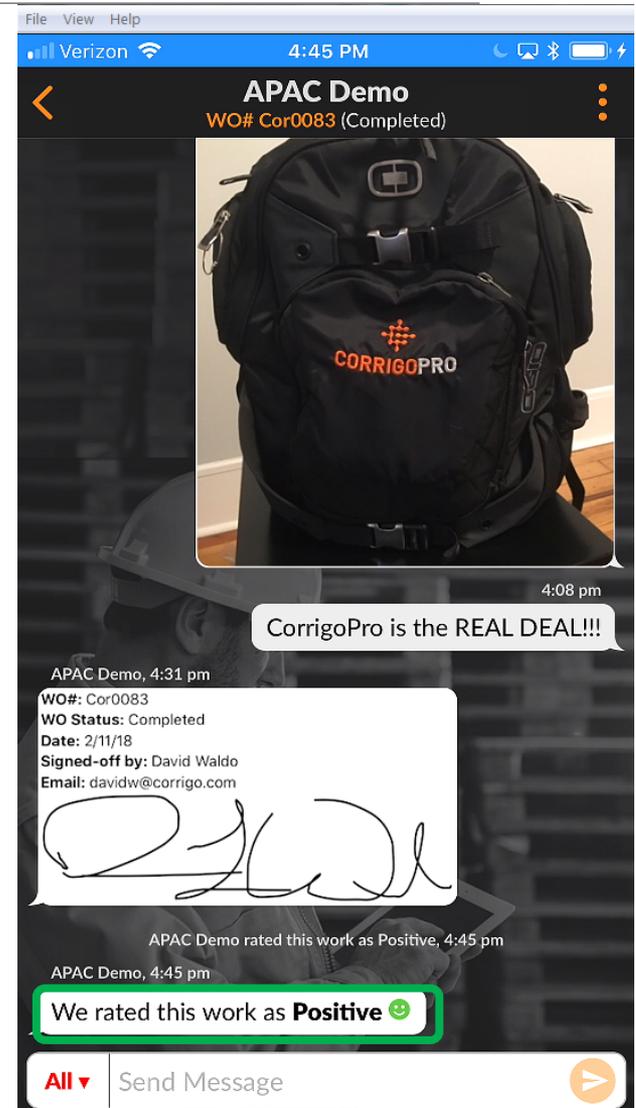
Mobile App: Work Order Filtering System

Click on the filter icon to open filter options

12 filter options are available

Click on the arrow to the right of the category that needs to be filtered

This will open the filter options

Mobile App: Work Order Filtering System
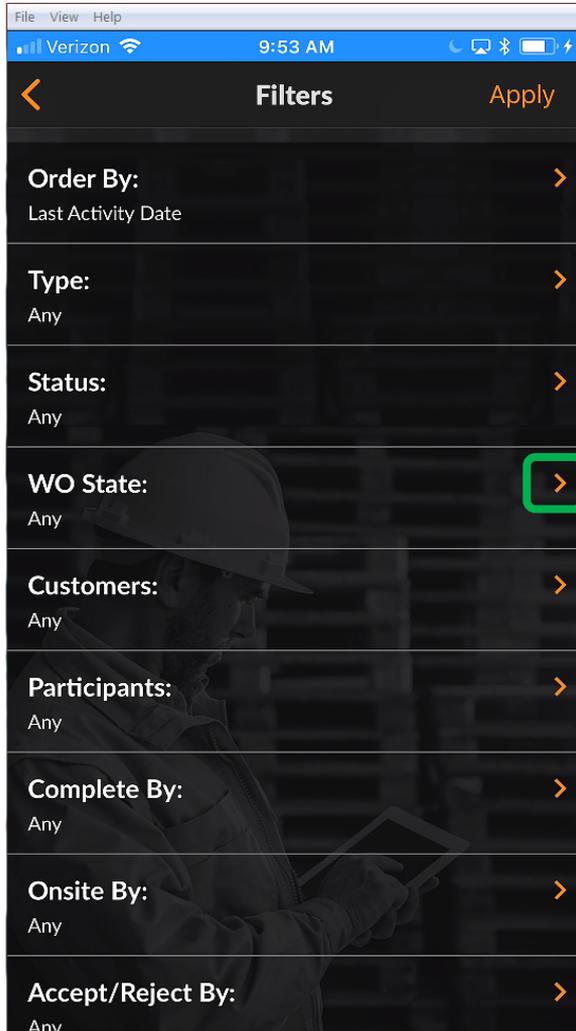
Filters screen (left):
- Order By: Last Activity Date
- Type: Any
- Status: Any
- WO State: Any
- Customers: Any
- Participants: Any
- Complete By: Any
- Onsite By: Any
- Accept/Reject By: Any

WO State screen (right):
- Waiting for Acceptance ☑
- Open ☑
- Open: In Progress ☑
- Open: Paused ☑
- Completed ☐
- On Hold ☑
- Recalled ☑
- Rejected ☑
- Waiting for WO Completion Details ☑

Click on the arrow to the right of the category that needs to be filtered

This will open the filter options shown to the right

By checking or un-checking the box a user can filter which work orders are displayed or hidden in the mobile app

In this case, completed work order is un-checked because this user does not wish to see completed work orders on their mobile app.

If the user checks the completed filter, the completed work orders will re-appear in their mobile app.
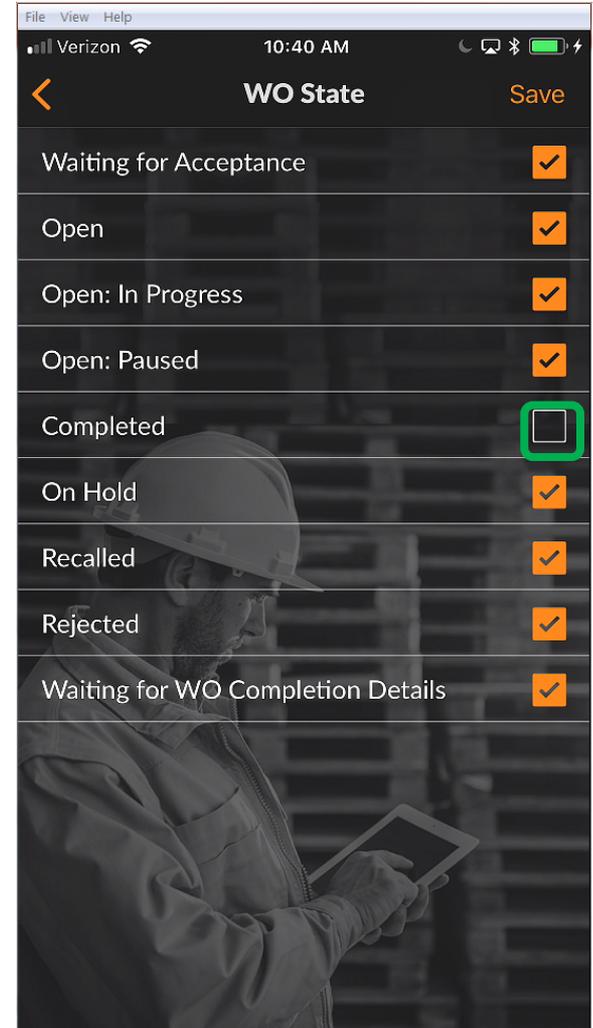
Geofencing
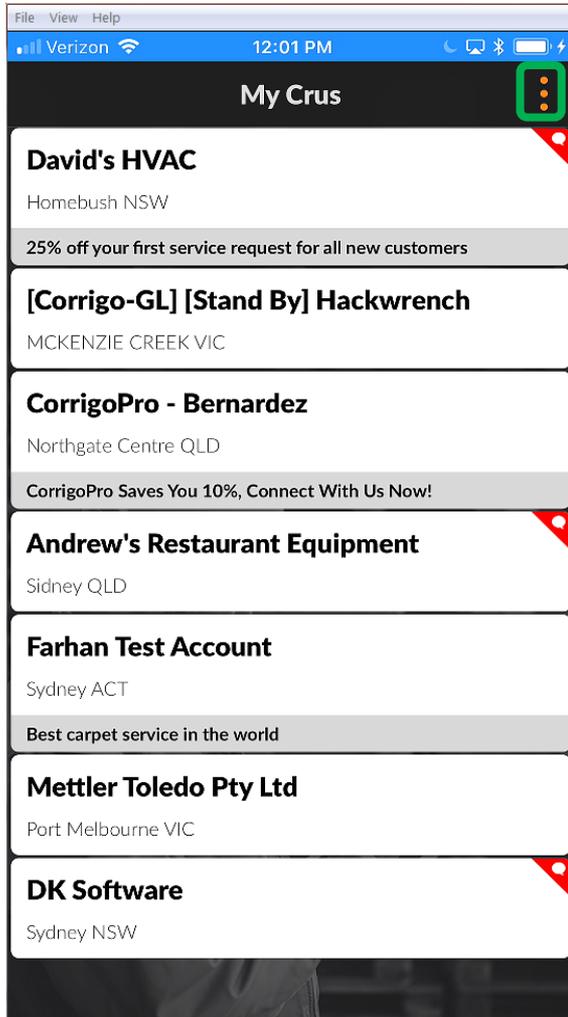
Geofensing prompts a mobile users to Check-in/Check-out or pause a work order when the users enter or exit a virtual boundary set up around a service location

The CorrigoPro platform will automatically send a notice to the users device when the is within the Geofence of the address on the work order, can identify multiple address for multiple work orders

From the My Crus screen click on the three dots in the upper right hand corner of the screen Click on "Settings"
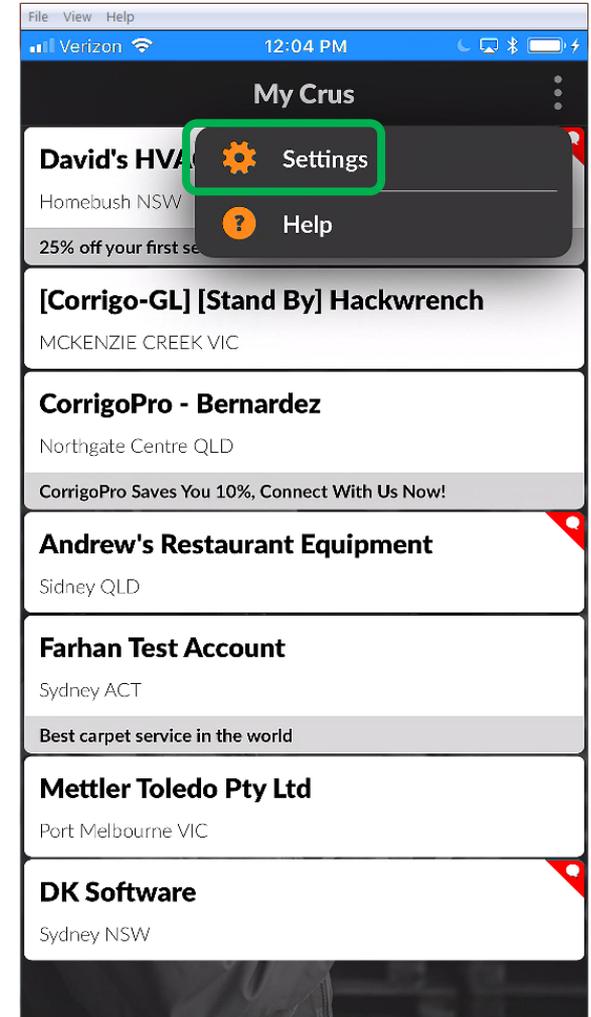
Geofencing
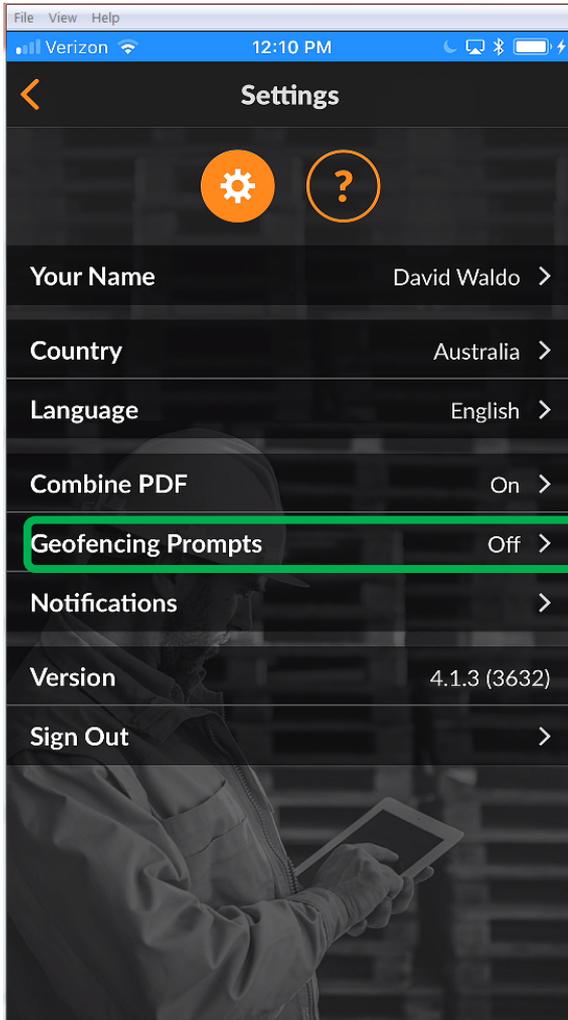
From the "Setting" screen the user can enable or disable the Geofencing function

Click on the arrow to the right of Geofencing Prompt

To enable or disable the Geofencing Prompt toggle the switch to the left or right.
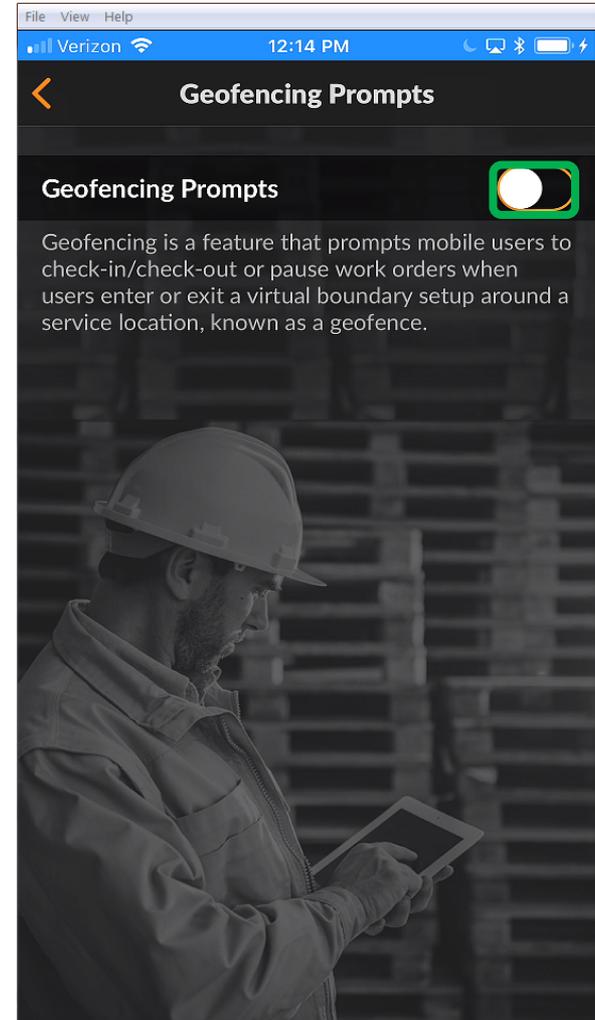
Notifications: Mobile App
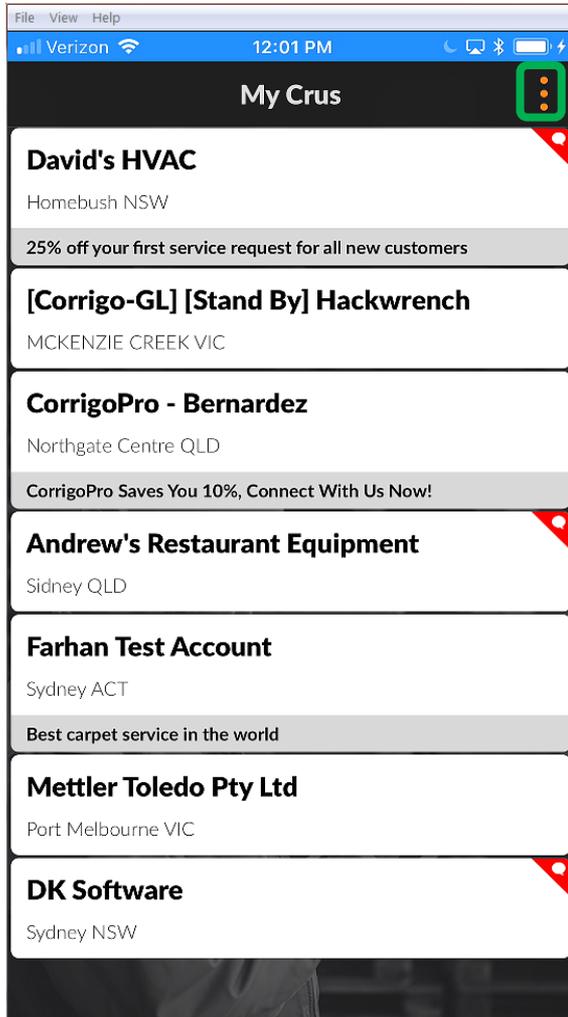
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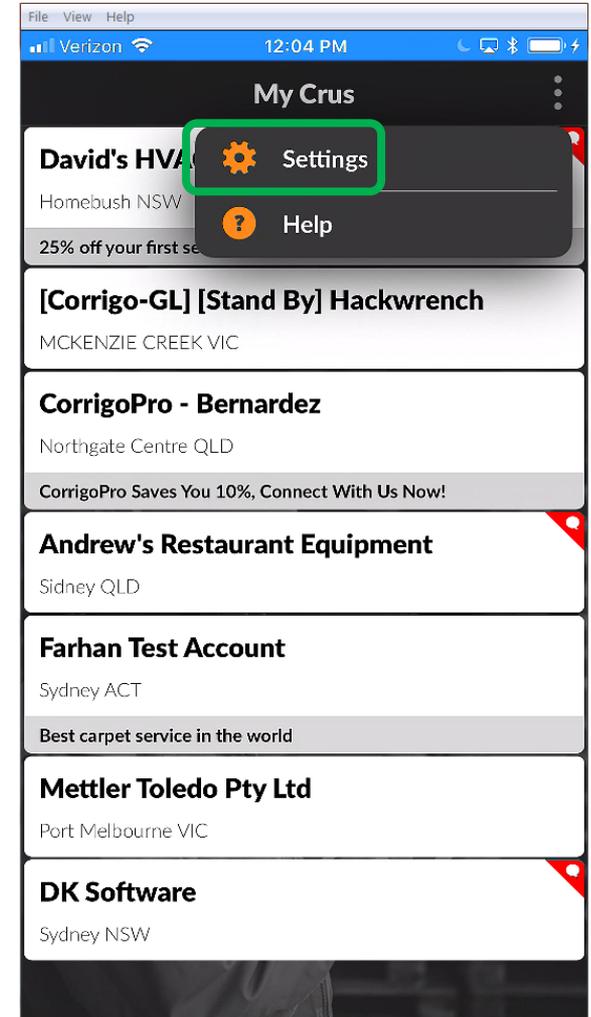
Notifications: Mobile App
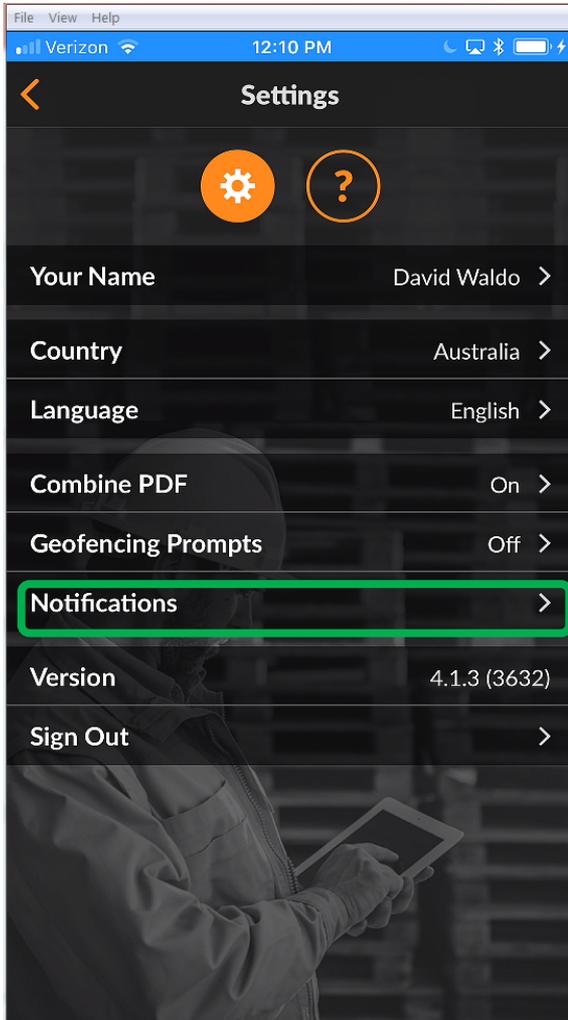
From the "Setting" screen the user can enable or disable Notifications

Click on the arrow to the right of Notifications

To enable or disable the desired notification check or un-check the box for the correspond notification

Notifications can be set for a customer, Cru, Partner(Sub-contractor) or system messages
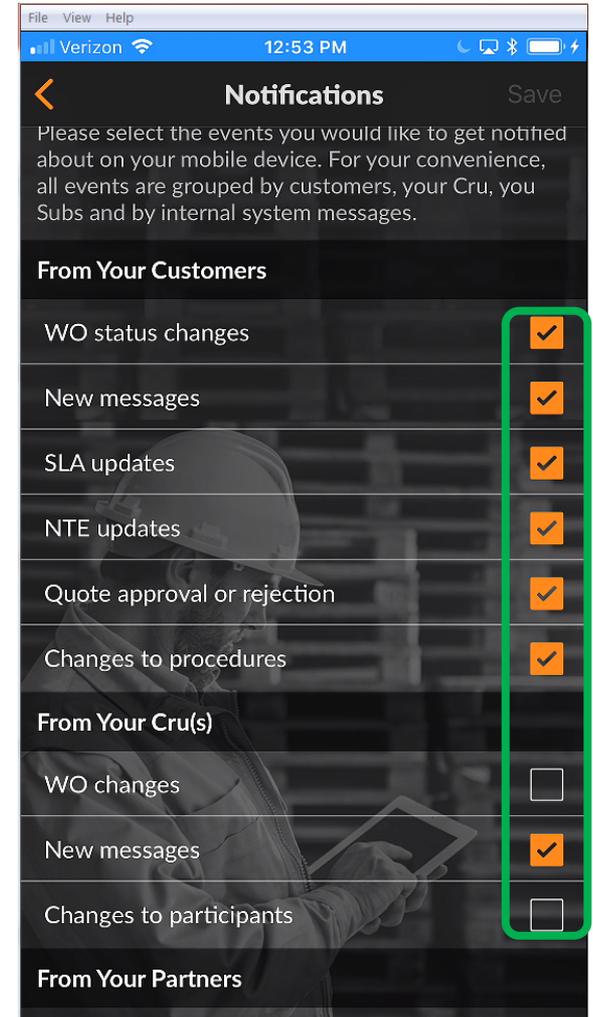
Questions

Contact Corrigo via phone or online:

https://corrigopro.com/contactus/