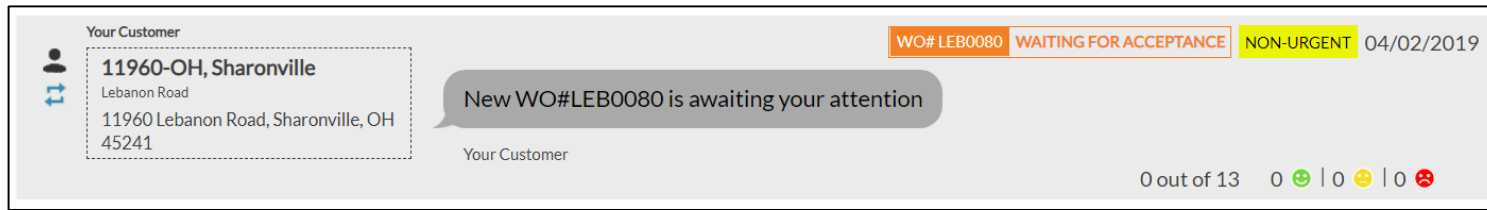


# Quick Reference - The Basic Steps of a Visit Work Order



The image above is a Visit work order in CorrigoPro. There are 5 steps to each work order for completion and invoicing. To get started, click anywhere on your work order, then follow the steps below.

1. Accept – Click “Accept” to accept your work order. Another option is to reply to your email alert with the work “Accept”.

Click to **ACCEPT** or **REJECT** WO #307860303?  
Any questions? Send a message

If the NTE is not sufficient and will need to be increased, then click “Here” where your invoicing limit is stated to submit a quote

You cannot invoice us more than \$500.00 USD for this work. Click **HERE** if you need this increased

2. Check In – This will be done on site by your tech if your customer requires it for each visit. If not, you must click “Check In” in the work order from the desktop to record the visit. Your customer may also have a schedule for each visit.

Please call {{IVRNumber}} and enter code: {{IVRCode}} to check-in at the beginning of your visit and check-out after you finish.

Visits are **SCHEDULED** to each **Wednesday, Friday, Monday**  
Customer expects you to arrive somewhere between **10:00 PM** and **2:00 AM**  
Your work order will be automatically completed after **13** visits.  
Upcoming visit is scheduled on **04/19/2019 10:00 PM - 04/20/2019 2:00 AM**

Please **CHECK IN** when you arrive on site and start working

3. Check In/Check Out - Once checked in, the system records the visit. When the visit is complete, click “Check Out”. You will be able to “Check In” again during your next visit

Please call {{IVRNumber}} and enter code: {{IVRCode}} to check-in at the beginning of your visit and check-out after you finish.  
Visits are **SCHEDULED** to each **Wednesday, Friday, Monday**  
Customer expects you to arrive somewhere between **10:00 PM** and **2:00 AM**  
Your work order will be automatically completed after **13** visits.

VISIT #	CHECK-IN	CHECK-OUT	STATUS
1	04/19/2019 6:15 PM !	-	100%

Please **CHECK OUT** when you complete visit. If you came for another visit you can **CHECK IN** and start a new visit.

- Good (visit was confirmed by mobile or GPS)
- Not Verified (customer has manually confirmed)
- Bad (visit was not verified by GPS on-site)

*(You can perform the check in and out steps from each scheduled Visit or if the customer does not have a schedule, this can be done for each Visit to the site until the work order is ready to be completed.)*

## Quick Reference - The Basic Steps of a Visit Work Order (continued)

4. Complete Work Order – When you are ready to complete the work order, click “Complete”. Keep in mind, you will not be able to add additional Visits after completion.

You have an option to **COMPLETE** this work order at any time. Once your work order is completed, you won't be able to execute any more visits.

5. Submitting Invoice – Once you are ready to enter the invoice, you will click “Here” within the Invoicing message.

You have until 05/15/2019 12:00 AM to submit the invoice. Click **HERE** to manage your invoice

To complete the invoice, you will need to fill in the items in green. Make sure you review the invoice and make sure everything is accurate.

If needed, you can also add any attachments to be sent to the customer with the invoice then click “Submit” at the bottom.

Now your work order is complete and the invoice has been submitted to your customer!

### Things to keep in mind when invoicing...

- The NTE amount on the invoice includes the billing for the Visits and any additional items list in the invoice.
- You can add additional items to the invoice by clicking “Please Select” on the next line.
- If the total exceeds the set NTE amount, a quote will need to be submitted to increase NTE from the CruChat.

**Invoice for Work Order #LEB0080**
DRAFT
☰
✕

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**CUSTOMER** Burgers, LLC

**LAST UPDATE DATE** 04/23/2019

**NTE** \$400.00 USD

**TIME ON SITE** --

**INVOICE BY** 05/15/2019 12:00 AM

**INVOICE DATE** 04/02/2019

**INVOICE #** LEB0080 USE WO#

**VISITS.** You can charge for visits no more than \$400.00 USD 🟢🟡🔴 2 ▲

#	DATE	CHECK-IN	CHECK-OUT	STATUS
1	04/19/2019	6:15 PM	-	🔴 100%
2	04/23/2019	-	5:14 PM	🔴 100% visit complete

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
(Visit Fee) Default S...	Default Services	2.00	\$200.0000	\$400.00
Please select		1.00	\$0.0000	\$0.00

**DISCOUNT** None ▼

**TAX** \$0.00 USD

**TOTAL** \$400.00 USD