



**CORRIGOPRO**

# Connecting with CorrigoPro

Managing Tiles and Creating Connections

# During this tutorial we will cover...

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- Logging into CorrigoPro Desktop
- The Company Profile tile
- Creating your free ad (promo)
- Editing your services
- Smart Zones
- The CorrigoPro tile
- Settings and email notifications
- Our Cru
- CruMembers and CruLeads
- Our Subs
- Our Customers
- CruChats

# Log into Your CorrigoPro Desktop

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

**CORRIGOPRO**  
DESKTOP

James Favreau ▾

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

EMAIL test@Corrigo.com

PASSWORD ●●●●

REMEMBER ME

**LOGIN**

[FORGOT YOUR PASSWORD?](#)

Click "LOGIN"

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# Your CorrigoPro Desktop

Logging in, you will arrive at the CorrigoPro Desktop

*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**

All Branches

WOs Awaiting Acceptance	▲	1
WOs Overdue	▲	29
Open Reactive WOs		25
Open PM/RM WOs		3
Require Completion Details		0

**WOs BY STATUS (LAST 90 DAYS)**

18 (Completed), 12 (Open), 5 (Open: In Progress)

CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

**YOUR INVOICES NEED ATTENTION**

- 18 ready to be invoiced WOs
- 15 draft invoices
- 0 disputed invoices

0 your average score

2 customers are connected to you

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

Powered by **CORRIGOPRO DIRECT**

Each of the tiles, when clicked on, will bring you to a specific section of the CorrigoPro Desktop

Invoice tile only displayed for “ADMIN” users

# The Company Profile Tile

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**0**  
your average score

**2**  
customers are connected to you

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**15** draft invoices

**0** disputed invoices

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**CORRIGOPRO**

All Branches

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Require Completion Details		0

WOs BY STATUS (LAST 90 DAYS)

● Open ● Open: In Progress ● Completed


Click on the tile to access your Company Profile Profile

# Managing Your Company Profile

Here you will be able to add a company logo and change your company name

Click on “EDIT” in the Business Overview section to enter details of the services your company provides

To enter or edit your physical location and contact information, click on “EDIT BRANCH INFO”



Canada Test Pro

[CHANGE COMPANY LOGO](#) [CHANGE COMPANY NAME](#)

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**Business Overview** [EDIT](#)

Multi-service provider. Going above and beyond to address any and all of our customers' needs.

**TAXPAYER IDENTIFICATION NUMBER (TIN)** \*\*\*\*\*255 [EDIT](#)

[WHAT IS A TIN NUMBER](#)

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**Branches** [EDIT BRANCH INFO](#)

<b>PROMO</b>	<a href="#">CREATE YOUR FREE AD</a>
<b>PHONE</b>	+1 404-565-4964
<b>EMAIL</b>	jamesf@corrigo.com
<b>FAX</b>	
<b>WEB SITE</b>	
<b>ADDRESS</b>	123 TEST, TEST, WA, AU, 6006
<b>SERVICES</b>	Electrical <a href="#">EDIT</a>
<b>SMART ZONES</b>	Western Australia <a href="#">EDIT</a>

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[HOW DO I ADD ANOTHER BRANCH?](#)

# Managing Your Company Profile

Here, you can edit your company phone number, email, website, and physical address details

These details will be visible to your connected customers, and this email will be listed as your general email for each of these customers

## Edit Branch Info ×

NAME	Canada Test Pro
PHONE	<input type="text" value="450-555-0123"/>
EMAIL	<input type="text" value="test@Corrigo.com"/>
FAX	<input type="text"/>
WEB SITE	<input type="text" value="www.companywebsite.com"/>
STREET	<input type="text" value="123 West Maple St. Suite 100"/>
STREET 2	<input type="text"/>
CITY	<input type="text" value="Montreal"/>
COUNTRY 	Australia
STATE	<input type="text" value="Quebec"/>
POSTAL CODE	<input type="text" value="H1A 5C2"/>

Click "SAVE"

CANCEL

SAVE

# PROMO / Create Your Free Ad

By clicking on the “CREATE YOUR FREE AD” link, the Create Promo window will appear

## Branches

[EDIT BRANCH INFO](#)

PROMO [CREATE YOUR FREE AD](#)

PHONE +1 404-565-4964

EMAIL jamesf@corrigo.com

FAX

WEB SITE

ADDRESS 123 TEST, TEST, WA, AU, 6006

SERVICES Electrical [EDIT](#)

SMART ZONES Western Australia [EDIT](#)

You may use up to 71 characters to display a promotional offer

Click “SAVE” to post your PROMO

You can return to your Company Profile page to update or remove your PROMO at any time



# Editing Your Services

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In the “SERVICES” section, select the specific service or services that your company provides

Your selections help current and potential clients find you in Corrigo

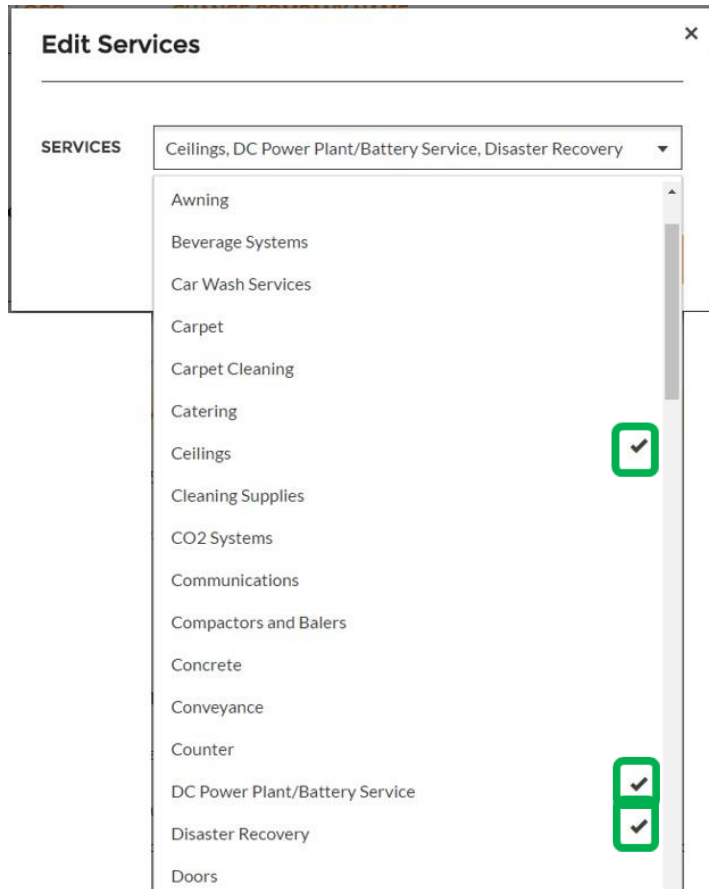
Click on the “EDIT” button and the Edit Services window will appear

## Branches

### EDIT BRANCH INFO

PROMO	CREATE YOUR FREE AD
PHONE	+1 450-555-0123
EMAIL	cap2nine@gmail.com
FAX	
WEB SITE	
ADDRESS	123 TEST, TEST, WA, AU, 6006
SERVICES	Disaster Recovery 
SMART ZONES	Western Australia 

# Editing Your Services



The 'Edit Services' dialog box features a title bar with a close button (X). Below the title bar is a 'SERVICES' section with a dropdown menu currently displaying 'Ceilings, DC Power Plant/Battery Service, Disaster Recovery'. A scrollable list of services follows, each with a checkbox to its right. The 'Ceilings' checkbox is checked and highlighted with a green box. At the bottom of the list, the 'DC Power Plant/Battery Service' and 'Disaster Recovery' checkboxes are also checked and highlighted with green boxes.


Service	Checked
Awning	
Beverage Systems	
Car Wash Services	
Carpet	
Carpet Cleaning	
Catering	
Ceilings	<input checked="" type="checkbox"/>
Cleaning Supplies	
CO2 Systems	
Communications	
Compactors and Balers	
Concrete	
Conveyance	
Counter	
DC Power Plant/Battery Service	<input checked="" type="checkbox"/>
Disaster Recovery	<input checked="" type="checkbox"/>
Doors	

Click on the drop down arrow in the “SERVICES” box to view all available services

Place a check to the right of the service you provide

Be sure to select only the services that your company provides as customers will use this information when searching for service providers on the CorrigoPro network

Once you have completed your company’s service selections, click “SAVE”



The 'Edit Services' dialog box is shown in a state where the 'SERVICES' dropdown menu is closed and the 'SAVE' button is highlighted with a green border. The 'CANCEL' button is also visible.

# Select Your Smart Zones

Selecting the correct Smart Zone coverage will ensure your company is visible to customers searching for the services you provide, in the areas where needed

Smart Zones are pre-defined geographic areas

Please be sure to select the Smart Zones that match your area of service

To review and edit your Smart Zones, click on the “EDIT” button in the Smart Zones row

This will bring you to the Smart Zones information screen

## Branches

[EDIT BRANCH INFO](#)

PROMO

[CREATE YOUR FREE AD](#)

PHONE

+1 404-565-4964

EMAIL

jamesf@corrigo.com

FAX

WEB SITE

ADDRESS

123 TEST, TEST, WA, AU, 6006

SERVICES

Electrical [EDIT](#)

SMART ZONES

Western Australia

[EDIT](#)

# Select Your Smart Zones

## Selecting Your Corrigo Smart Zones

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Selecting your Corrigo Smart Zones is simple – just follow the steps below to select your primary zone and any additional zones you need to match your coverage area.

Remember:


- Your primary Smart Zone (service area)
- In countries with multiple smart zones, each zone can be customized to the county or city level to match your service area.

Click “NEXT” to access  
the Smart Zones list

BACK


NEXT

# Select Your Smart Zones

 > **COMPANY PROFILE** James Favreau ▾

---

## Set-Up Smart Zones

Country  

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland
  - Aguathuna
  - Anchor Point
  - Aquaforte
  - Arnolds Cove
  - Aspen Cove
  - Avondale
  - Badger
  - Badgers Quay
  - Baie Verte


By clicking on the **plus** symbol to the left of any state, province or territory, you can drill down to specific cities and townships within the Smart Zone

Click the checkboxes beside all the areas in which you provide service

Click "NEXT" BACK NEXT

# Select Your Smart Zones

You will be prompted to confirm your Smart Zone selections

 > **COMPANY PROFILE** James Favreau ▾

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## Corrigo Smart Zone Summary

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You selected 2 Smart Zone(s)

**Canada**

- Manitoba
- Newfoundland

Your primary zone is included with your subscription plan.

Click the 'I Agree' button below to confirm your selection and complete your Smart Zone set-up process.

Once your Smart Zone selections match your service area, click "I AGREE"


[BACK](#) [I AGREE](#)

# Returning To The CorrigoPro Desktop

With your Smart Zones selected, your Company Profile is now complete!

**COMPANY PROFILE** James Favreau

## Company Profile

 Canada Test Pro

[CHANGE COMPANY LOGO](#) [CHANGE COMPANY NAME](#)

### Business Overview [EDIT](#)

Multi-service provider. Going above and beyond to address any and all of our customers' needs.

**TAXPAYER IDENTIFICATION NUMBER (TIN)** \*\*\*\*\*255 [EDIT](#)

[WHAT IS A TIN NUMBER](#)

### Branches [EDIT BRANCH INFO](#)

**PROMO** [CREATE YOUR FREE AD](#)

**PHONE** +1 404-565-4964

**EMAIL** jamesf@corrigo.com

**FAX**

You can return to the CorrigoPro Desktop, from any tile, by clicking on the blue “Home” icon at the top of the page

# The CorrigoPro Tile

To access the CorrigoPro portal from your desktop, click on the CorrigoPro tile

*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](#)

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CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

**YOUR INVOICES NEED ATTENTION**

18 ready to be invoiced WOs	15 draft invoices	0 disputed invoices
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0 your average score

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**CORRIGOPRO**

All Branches

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Open PM/RM WOs	3
Require Completion Details	0

**WOs BY STATUS (LAST 90 DAYS)**

Status	Count
Open	12
Open: In Progress	5
Completed	18

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

Powered by **CORRIGOPRO DIRECT**



# The CorrigoPro Tile Filters

Click on the desired filter to view work order in a specific status in your desk top portal

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**WOS BY STATUS (LAST 90 DAYS)**

WOs Awaiting Acceptance	▲	1	🗑️
WOs Overdue	▲	29	🗑️
Open Reactive WOs		25	🗑️
Open PM/RM WOs		3	🗑️
Require Completion Details		0	🗑️

**WOS BY STATUS (LAST 90 DAYS)**

● Open ● Open: In Progress ● Completed

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

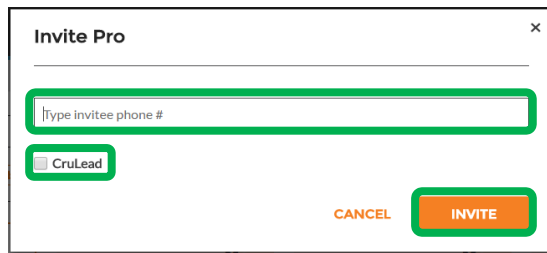
Powered by **CORRIGOPRO DIRECT**

# Our Cru

From the Our Cru page you will see all of your invited and connected internal employees

To invite a new CruMember click on the large, white box with the *plus* symbol

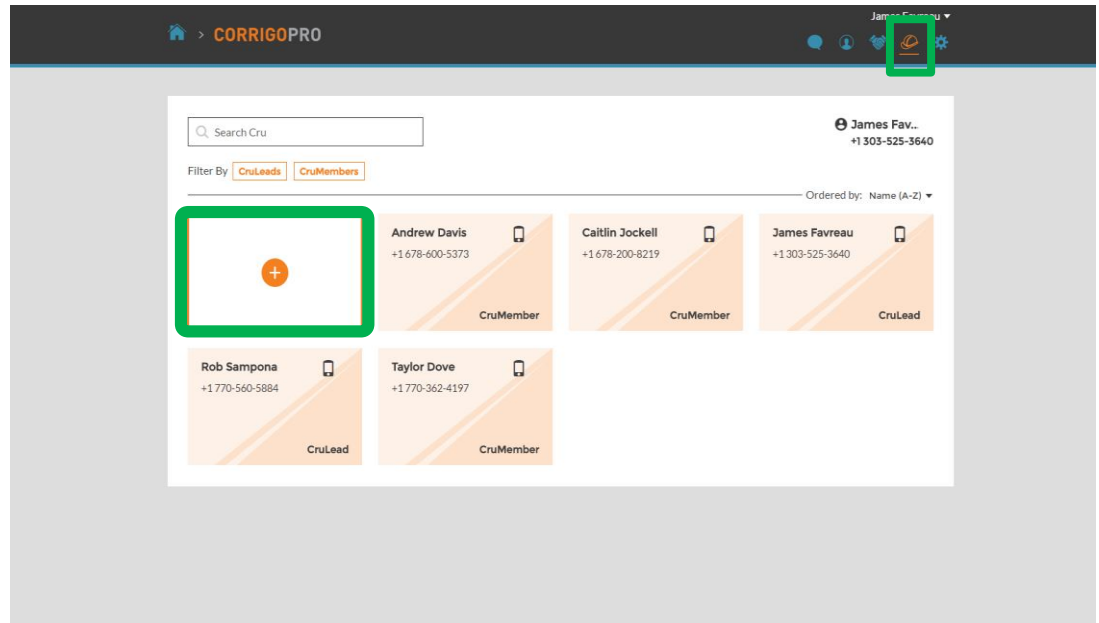
The “Invite Pro” window will appear



Enter the employee’s mobile phone number

Click “INVITE”

By default, the invitee will be invited as a “CruMember”, however, you may select to invite them as a “CruLead”

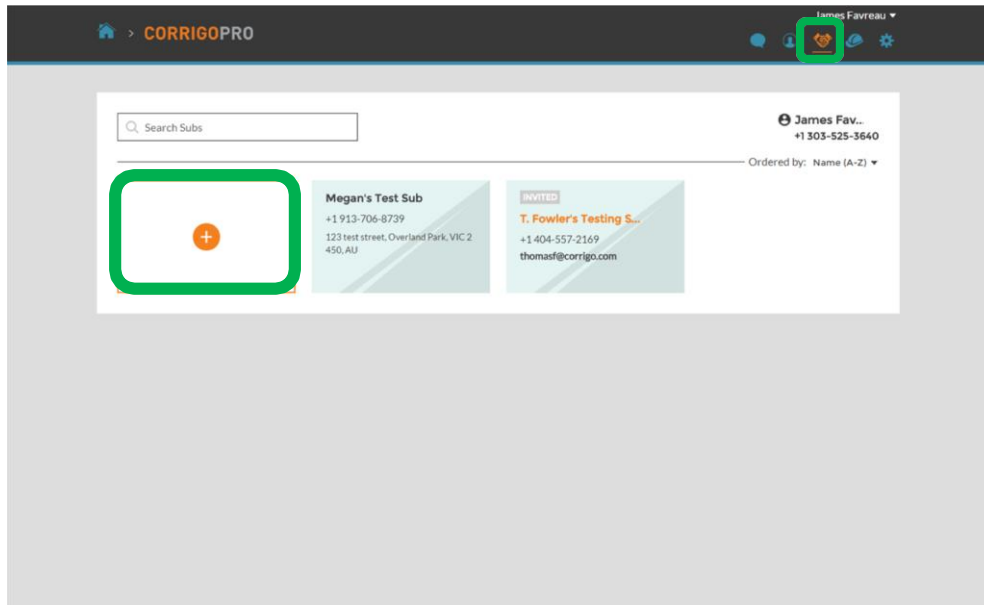


**A CruLead**, typically someone in a leadership or dispatch role, can see all CruChats

**A CruMember**, typically technicians or field personnel that only need to be included in specific conversations, must be added to a CruChat

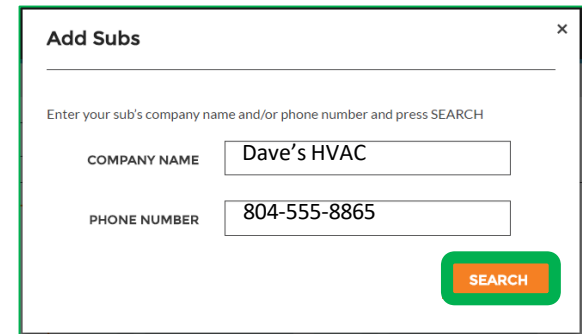
# Our Subcontractors

By clicking on the “Our Subs” icon, represented by a handshake, you will see all of your invited and connected subcontractors or partner businesses



To invite a new Sub, click on the large, white box with the orange **plus** symbol

This will bring up the “Add Subs” window



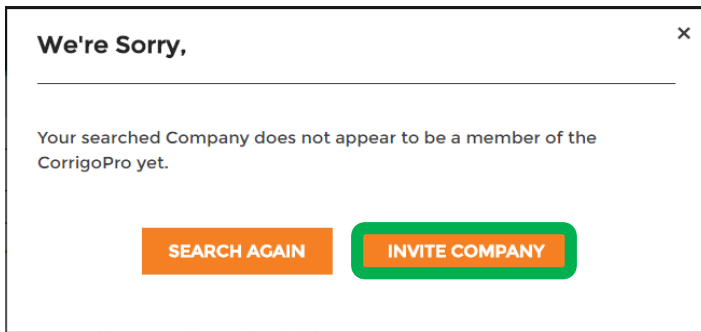
Enter the Sub's company name and mobile phone number

Then click “SEARCH”

This will initiate a search of the CorrigoPro system to see if your Sub is already connected to Corrigo

# Our Subs: Inviting your subs

If your Sub's company is not found, then simply click "INVITE COMPANY"



**We're Sorry,** ✕

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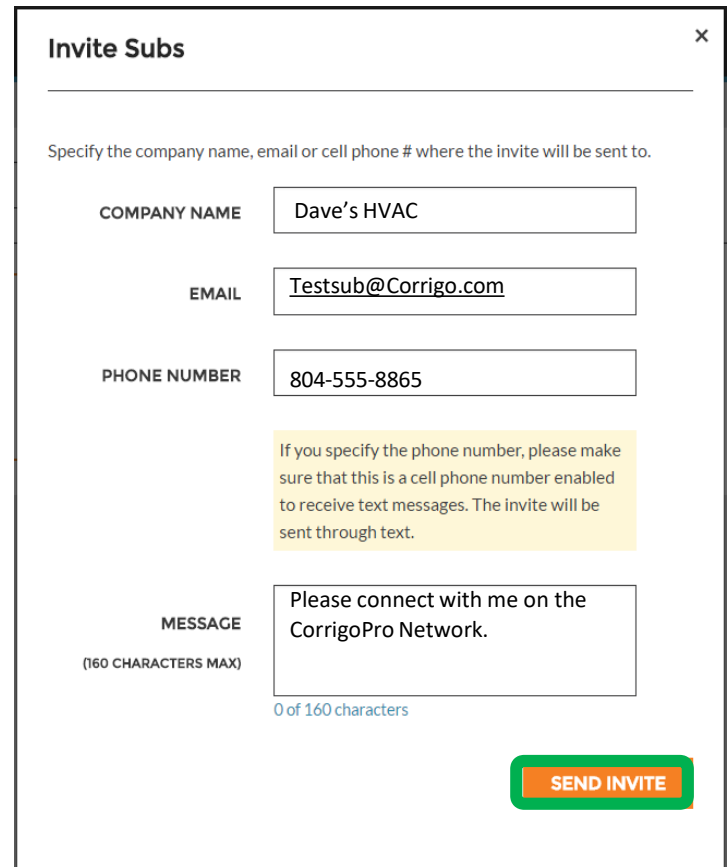
Your searched Company does not appear to be a member of the CorrigoPro yet.

**SEARCH AGAIN** **INVITE COMPANY**

Enter the Sub's company name, email address and mobile phone number

You may send a personalized message to your Sub or send the invite with no message  
Click "SEND INVITE" to invite your Sub

The "Invite Subs" window will appear



**Invite Subs** ✕

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Specify the company name, email or cell phone # where the invite will be sent to.

**COMPANY NAME**

**EMAIL**

**PHONE NUMBER**

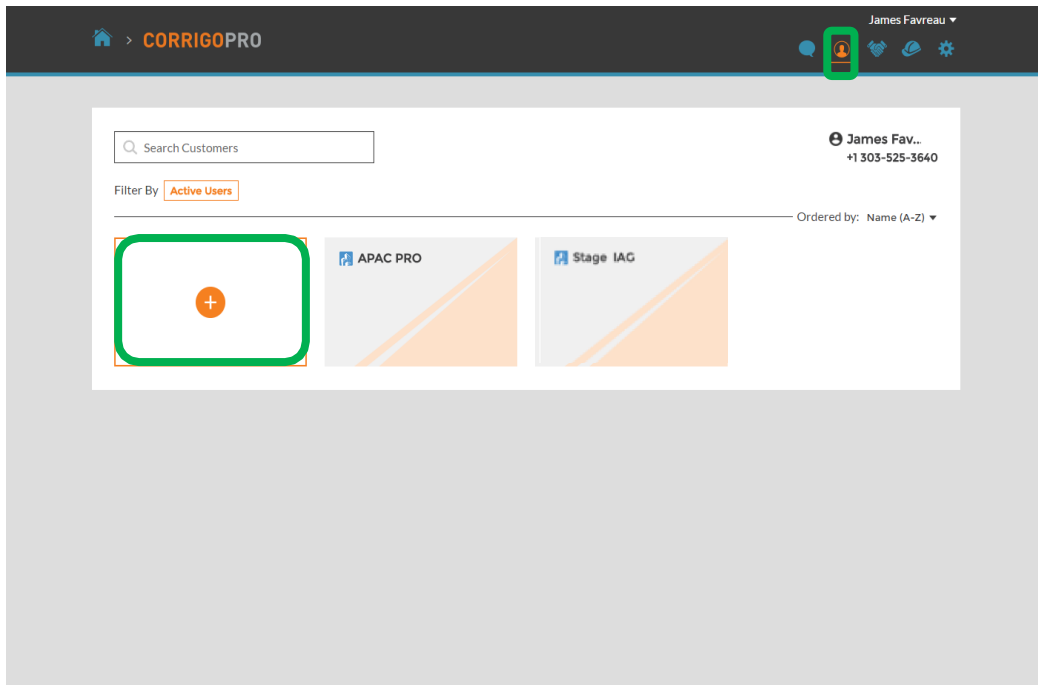
If you specify the phone number, please make sure that this is a cell phone number enabled to receive text messages. The invite will be sent through text.

**MESSAGE**  
(160 CHARACTERS MAX)  
  
0 of 160 characters

**SEND INVITE**

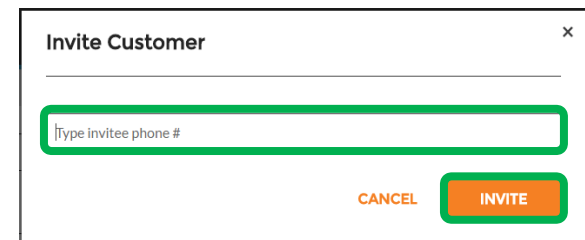
# Our Customers

The next icon is a circle with a silhouette, clicking here will bring you to your “Our Customers” page where you can manage and view your invited and connected customers



To invite a non-Corrigo customer to connect, click on the large, white box with the orange *plus* symbol

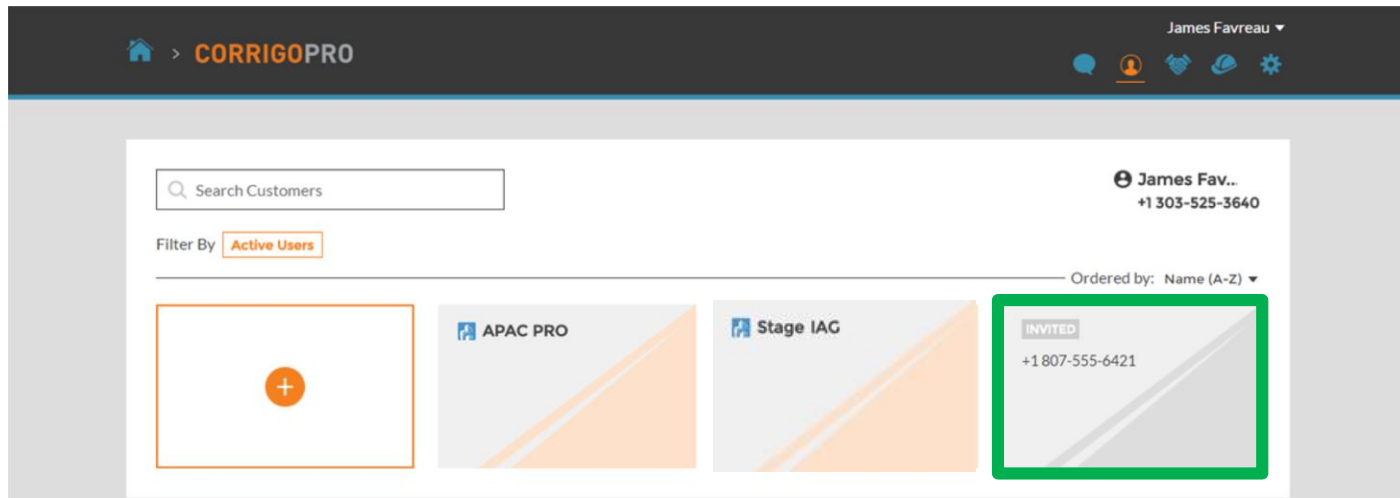
The “Invite Customer” window will appear

A screenshot of the 'Invite Customer' dialog box. The dialog has a title bar with 'Invite Customer' and a close button (X). Below the title bar is a text input field with the placeholder text 'Type invitee phone #'. At the bottom of the dialog are two buttons: 'CANCEL' and 'INVITE'.

Enter your customer’s mobile phone number and then click “INVITE”

# Our Customers

Since CorrigoPro is designed to be used by anyone needing a service provider, you can invite all of your customers to connect with you



Once invited, your customer will receive a text message with instructions on connecting with you via mobile app

You will also see a new box appear on the Our Customers page with their information and "INVITED" as their status

# CruChats

The last icon, which is represented by a speech bubble, is the “CruChats” icon

The screenshot displays the CruChats interface. At the top, there is a navigation bar with a home icon, the text 'CORRIGOPRO', and a user profile for 'James Favreau'. Below the navigation bar, there is a search bar labeled 'Search Chats' and filter options for 'Status: Any', 'WO State: Any', and 'Complete By: Any'. A 'MORE...' button is also visible. The main content area shows a list of work orders (WOs) with their details and status. The first two WOs are highlighted in yellow, and the last two are in grey. Each WO entry includes a company name, address, a message bubble, and a status label with a date.

Company	Address	Message	WO#	Status	Date
APAC PRO	181 William St, Melbourne, VIC 3000, AU	New WO#IAG0100084 waiting for your attention	WO# IAG0100084	URGENT	Friday
APAC PRO	6-14 Castle St, Castle Hill, NSW 1765, AU	New WO#IAG0460001 waiting for your attention	WO# IAG0460001	PROJECT	Friday
APAC PRO	1-3 Bath Lane, Ballarat, VIC 3350, AU	New WO#IAG0020003 waiting for your attention	WO# IAG0020003	HIGH	03/03/2017
Stage IAG	388 George St, All Floors, Sydney, NSW 2000, AU	New WO#TEST100142 waiting for your attention	WO# TEST100142	STANDARD	03/01/2017

Using the search and filter options from your CruChats page, you can review, filter, and access all of your CruChats and work orders

# Congratulations!

You can now navigate and manage all of the tiles in the CorrigoPro Desktop portal

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# Questions

Contact Corrigo via phone or online:

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