



CORRIGOPRO

How to Get Paid:
Invoicing your Customers through CorrigoPro

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CorrigoPro Desktop Login

CORRIGOPRO
DESKTOP

✚

davidw@corrigo.com

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REMEMBER ME

Type in your email address and password to login to CorrigoPro

LOGIN

[FORGOT YOUR PASSWORD?](#)

CorrigoPro Invoicing Tile

Check out the latest updates from CorrigoPro

Learn More

- Accept/reject work orders via email
- Capture customer signatures on your mobile device
- Plus, so much more

CORRIGOPRO | David's HVAC

CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

MY CORRIGO BILLING ACCOUNT

Category	Count
WOs Awaiting Acceptance	6
WOs Overdue	79
Open Reactive WOs	71
Open PM/RM WOs	2
Waiting for WO Completion Det...	0

WOs BY STATUS (LAST 90 DAYS)

7
4
35

Open In Progress
Completed

72
your average score

2
customers are connected to you

YOUR INVOICES NEED ATTENTION

Category	Count
ready to be invoiced WOs	33
draft invoices	27
disputed invoices	0

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

Powered by **CORRIGOPRO DIRECT**

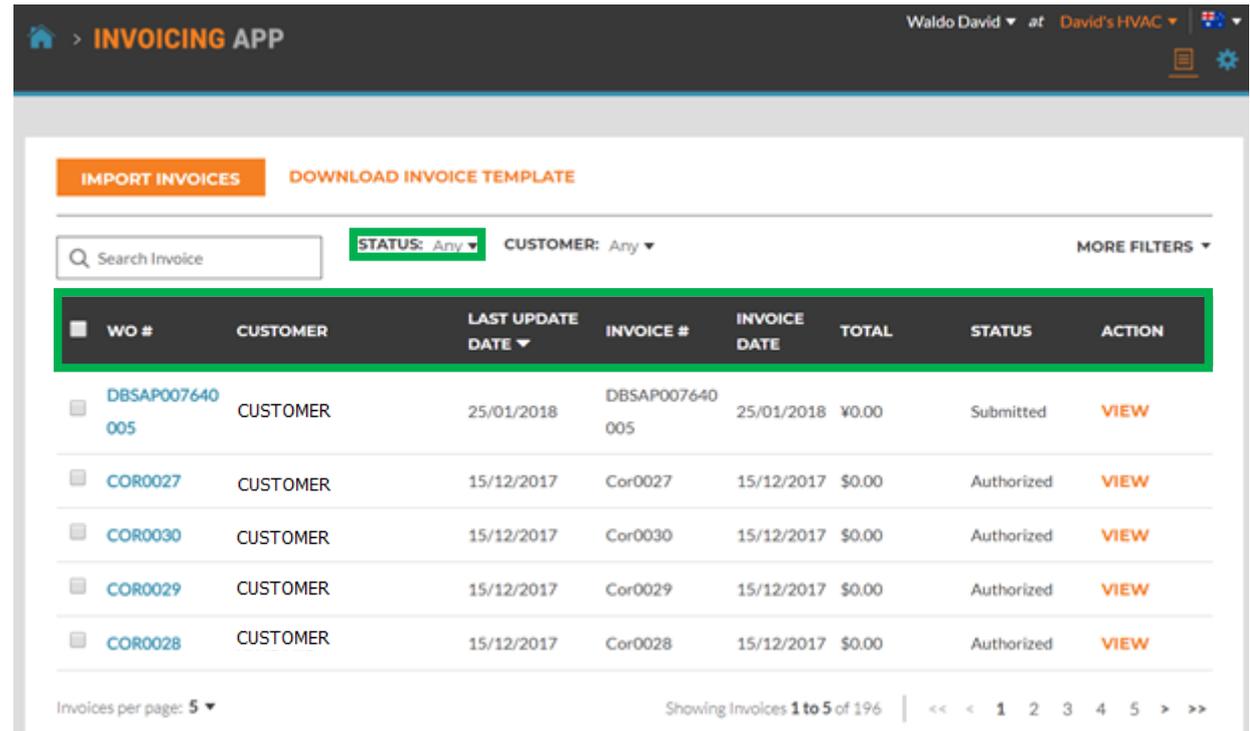
Only ADMIN USERS will be able to see and access the Invoicing Tile

Click on the Invoicing tile to open the Invoicing App within CorrigoPro Desktop

Invoicing App

Data Fields

- WO#
- Customer
- Last date Updated
- Invoice #
- Invoice Date
- Total
- Status
- Action
- Search function allows you to search by WO# or Invoice#



The screenshot shows the Invoicing App interface. At the top, there's a navigation bar with a home icon, the text "INVOICING APP", and user information "Waldo David" and "David's HVAC". Below the navigation bar, there are two buttons: "IMPORT INVOICES" and "DOWNLOAD INVOICE TEMPLATE". A search bar labeled "Search Invoice" is present, along with filter dropdowns for "STATUS: Any" and "CUSTOMER: Any", and a "MORE FILTERS" link. The main content is a table with the following columns: WO #, CUSTOMER, LAST UPDATE DATE, INVOICE #, INVOICE DATE, TOTAL, STATUS, and ACTION. The table contains five rows of invoice data. At the bottom, there's a pagination control showing "Invoices per page: 5" and "Showing Invoices 1 to 5 of 196".

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
DBSAP007640005	CUSTOMER	25/01/2018	DBSAP007640005	25/01/2018	\$0.00	Submitted	VIEW
COR0027	CUSTOMER	15/12/2017	Cor0027	15/12/2017	\$0.00	Authorized	VIEW
COR0030	CUSTOMER	15/12/2017	Cor0030	15/12/2017	\$0.00	Authorized	VIEW
COR0029	CUSTOMER	15/12/2017	Cor0029	15/12/2017	\$0.00	Authorized	VIEW
COR0028	CUSTOMER	15/12/2017	Cor0028	15/12/2017	\$0.00	Authorized	VIEW

Click on "Status"

Invoicing App: Status / Customer

Status Drop Down View

- Place a check to the right of the invoice status you wish to view
- Can view more than one status at a time
- Click “Clear selected” to view all invoices

The screenshot shows the 'INVOICING APP' interface. At the top, there are navigation links for 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. Below this is a search bar and filter options for 'STATUS: Any' and 'CUSTOMER: Any'. A table of invoices is displayed with columns for 'WO #', 'CUSTOMER', 'INVOICE DATE', 'TOTAL', 'STATUS', and 'ACTION'. A dropdown menu is open over the 'STATUS' column, showing options: 'Clear selected', 'New', 'Draft', 'Pending Verification', 'Submitted', 'Authorized', 'Paid', 'Disputed', and 'Canceled'. The 'Clear selected' option is highlighted in orange.

WO #	CUSTOMER	INVOICE DATE	TOTAL	STATUS	ACTION
DBSAP007640005	CUSTOMER	25/01/2018	\$0.00	Submitted	VIEW
COR0027	CUSTOMER	15/12/2017	\$0.00	Authorized	VIEW
COR0030	CUSTOMER	15/12/2017	\$0.00	Authorized	VIEW
COR0029	CUSTOMER	15/12/2017	\$0.00	Authorized	VIEW
COR0028	CUSTOMER	15/12/2017	\$0.00	Authorized	VIEW

The screenshot shows the 'INVOICING APP' interface. At the top, there are navigation links for 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. Below this is a search bar and filter options for 'STATUS: Any' and 'CUSTOMER: Any'. A table of invoices is displayed with columns for 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'STATUS', and 'ACTION'. A dropdown menu is open over the 'CUSTOMER' column, showing options: 'Clear selected', 'PRO', and 'Stage'. The 'Clear selected' option is highlighted in orange.

WO #	CUSTOMER	LAST UPDATE DATE	STATUS	ACTION
DBSAP007640005	CUSTOMER	25/01/2018	Submitted	VIEW
COR0027	CUSTOMER	15/12/2017	Authorized	VIEW
COR0030	CUSTOMER	15/12/2017	Authorized	VIEW
COR0029	CUSTOMER	15/12/2017	Authorized	VIEW
COR0028	CUSTOMER	15/12/2017	Authorized	VIEW

Customer Drop Down

- View all customers or place a check to the right of the specific customer you wish to view
- Click “Clear selected” to view all customers

Invoicing App: More Filters

The screenshot shows the 'INVOICING APP' interface. At the top, there are navigation elements including a home icon, the app name, and user information (Waldo David at David's HVAC). Below this, there are two buttons: 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. A search bar labeled 'Search Invoice' is present. Filter options for 'STATUS: Any', 'CUSTOMER: Any', and 'TYPE: Any' are shown. A 'MORE FILTERS' dropdown menu is open, displaying a search input, 'Clear selected', 'Reactive Work Orders', and 'PM/RM Work Orders'. The main table lists invoices with columns for 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', and 'INVOICE #'. The first row is highlighted with a green box. At the bottom, there is a pagination control showing 'Showing Invoices 1 to 5 of 196' and a 'Invoices per page: 5' dropdown.

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	ACTION
DBSAP007640005	CUSTOMER	25/01/2018	DBSAP007640005	VIEW
COR0027	CUSTOMER	15/12/2017	Cor0027	VIEW
COR0030	CUSTOMER	15/12/2017	Cor0030	VIEW
COR0029	CUSTOMER	15/12/2017	Cor0029	VIEW
COR0028	CUSTOMER	15/12/2017	Cor0028	VIEW

More Filters

- Gives you the option of viewing invoices by Invoice Date, Last Update and invoice Type
- Click on “TYPE” to view invoices for Reactive Work Orders or PM/RM Work Orders
- Click “Clear selected” to view all invoices

Invoicing App: Creating / Viewing a Single Invoice

The screenshot shows the 'INVOICING APP' interface. At the top, there's a navigation bar with a home icon, the app name, and user information: 'Waldo David at David's HVAC'. Below the navigation bar, there are two buttons: 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. A search bar labeled 'Search Invoice' is on the left. To the right of the search bar are filters: 'STATUS: New', 'CUSTOMER: Any', and 'TYPE: Any', along with a 'MORE FILTERS' dropdown. The main content is a table with the following columns: 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'INVOICE #', 'INVOICE DATE', 'TOTAL', 'STATUS', and 'ACTION'. The table contains four rows of data. The first row has 'IAG0230200' in the 'WO #' column and 'CREATE' in the 'ACTION' column. Red arrows point from the 'IAG0230200' cell to the 'CREATE' cell in the same row. The other rows have 'IAG0230137', 'IAG0230147', and 'IAG0230236' in the 'WO #' column and 'CREATE' in the 'ACTION' column.

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
IAG0230200	CUSTOMER	15/12/2017				New	CREATE
IAG0230137	CUSTOMER	15/12/2017				New	CREATE
IAG0230147	CUSTOMER	15/12/2017				New	CREATE
IAG0230236	CUSTOMER	09/10/2017				New	CREATE

- Click on the WO# to view the details of the work order

- Click on "Create" to open the desired invoice

Invoicing App: Time on Site

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER

LAST UPDATE 15/12/2017 INVOICE DATE

DATE INVOICE # USE WO#

NTE \$500.00

TIME ON SITE [VIEW](#)

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL
Please select		1	\$0.00	\$0.00

TAX \$0.00

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS or drag and drop it here

ACTION HISTORY

PRICE LIST

RESET SUBMIT

Once you click “Create”, you will see your invoice template

- Click on “TIME ON SITE” to see how much time was spent providing this service
- Check in and Check out times are recorded
- GPS location is ONLY recorded for Check in / Check Out
- The status is set to “Bad” if not within set distance from location
- It is set to “Good” if within that set distance

Time on Site for Work Order #IAG0230200

Check-In/Check-Out Log

CHECK-IN	CHECK-OUT	VERIFIED TIME
30/06/2017 1:05 AM Status: Bad Method: Gps	30/06/2017 1:07 AM Status: Bad Method: Gps	

Total Verified Time on Site: 0 mins

OK

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS or drag and drop it here

Invoicing App: Required Data fields

Waldo David at David's HVAC

Invoice for Work Order #IAG0230200 NEW

CUSTOMER CUSTOMER

LAST UPDATE 15/12/2017 INVOICE DATE

DATE INVOICE # USE WO#

NTE \$500.00

TIME ON SITE -- [VIEW](#)

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL
Please select		1	\$0.00	\$0.00

TAX \$0.00

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

ACTION HISTORY

[PRICE LIST](#) [RESET](#) [SUBMIT](#)

Required Fields

- Invoice date
- Invoice Number
- Category/Item | Description | QTY | Rate | Subtotal
- Tax (If applicable)
- Uploading Attachments is optional

Invoicing Data Field: Date / Invoice Number

Invoice for Work Order #DEMO1000183

CUSTOMER CUSTOMER

LAST UPDATE 10/11/2017

DATE

NTE \$575.00

TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE
Please select		1	\$0.00

TAX 0

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS or drag and drop it here

ACTION HISTORY

PRICE LIST

RESET

Click on the “Calendar” icon

- Click on the date you wish to use for this invoice
- The date will populate in the date field
- Forward and back arrows will allow to customize the desired date used

Invoice

- By clicking on the “Use WO#” you can use the WO# as the invoice #
- Customize your invoice # by typing in the desired number you wish to use – Please DO NOT copy and paste into this field

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER

LAST UPDATE 30/01/2018

DATE

NTE \$500.00

TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL
Please select		1	\$0.00	\$0.00

TAX \$0.00

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS or drag and drop it here

ACTION HISTORY

PRICE LIST

RESET

SUBMIT

Invoicing App: Required Data Fields / Itemize Invoice

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER
LAST UPDATE 30/01/2018 INVOICE DATE 30/01/2018
DATE INVOICE # IAG0230200 USE WO#
NTE \$500.00
TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ACTION
Please select		1	\$0.00	\$0.00	DELETE

Search

- Bundled "Hard" Services - WA - Technician - HVAC / Elec - Premium Rate - Taxable
- Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable
- Bundled "Hard" Services - WA - Total Minimum Charge - OT Rate - Taxable
- Bundled "Hard" Services - WA - Total Minimum Charge - Premium Rate - Taxable
- Bundled "Hard" Services - WA - Total Minimum Charge - Reg. Rate - Taxable
- John's Aussie-HVAC Std Labor
- John's Aussie-OT Labor

- Click under “CATEGORY / ITEM” to open the text box
- If a rate card is used, select services from the items provided
- If no rate card is being used, select from Labor/ Materials Parts/ Misc./Shipping/Services

- If rate card is used Category/ Item, Description, and Rate will auto-populate – QTY should be added
- Manually populate invoice if using Labor/Material Parts/Mics/Shipping/ Services
- Tax has to be manually populated

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER
LAST UPDATE 30/01/2018 INVOICE DATE 30/01/2018
DATE INVOICE # IAG0230200 USE WO#
NTE \$500.00
TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ACTION
Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE
Please select		1	\$0.00	\$0.00	

TAX \$0.00
TOTAL \$100.00

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

Invoicing App: Required Data Fields / Itemize Invoice

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER
LAST UPDATE 30/01/2018 INVOICE DATE 30/01/2018
DATE INVOICE # IAG023020C USE WO#
NTE \$500.00
TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ACTION
Bundled "Hard" Ser...	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE
Taxable Material	Copper tubing	4.50	\$25.00	\$112.50	DELETE
Taxable Material	Trip Charge	1	\$55.00	\$55.00	DELETE

TAX \$0.00
TOTAL \$267.50

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

- NTE is the maximum amount that an invoice can be submitted for, in this case the NTE is \$500
- NTE is tax inclusive
- Add as many items as needed in the invoice
- Description field is free text up to 1140 characters

- Once you have a total, taxes can be calculated and applied
- The total will be auto populated

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER
LAST UPDATE 30/01/2018 INVOICE DATE 30/01/2018
DATE INVOICE # IAG023020C USE WO#
NTE \$500.00
TIME ON SITE -- VIEW

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ACTION
Bundled "Hard" Ser...	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE
Taxable Material	Copper tubing	4.50	\$25.00	\$112.50	DELETE
Taxable Material	Trip Charge	1	\$55.00	\$55.00	DELETE
Please select		1	\$0.00	\$0.00	

TAX \$26.75
TOTAL \$294.25

Invoicing App: Attaching Documents

CUSTOMER CUSTOMER
LAST UPDATE 30/01/2018
DATE
NTE \$500.00
TIME ON SITE -- VIEW

INVOICE DATE 30/01/2018
INVOICE # IAG023020C USE WO#

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	
Bundled "Hard" Ser...	Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable	1	\$100.00	\$100.00	DELETE
Taxable Material	Copper tubing	4.50	\$25.00	\$112.50	DELETE
Taxable Material	Trip Charge	1	\$55.00	\$55.00	DELETE
Please select		1	\$0.00	\$0.00	

TAX \$26.75
TOTAL \$294.25

UPLOAD YOUR ATTACHMENTS

To attach a document click on "UPLOAD YOUR ATTACHMENTS"

Organize New folder

Documents library
Training Materials for CorigoPro

Name	Date modified	Type	Size
CorigoPro Quick Reference Guide MOBL...	6/30/2017 8:24 PM	Adobe Acrobat D...	558 K
4. Vendor Bulletin - Go Live 1st July 2017 ...	6/30/2017 8:16 PM	Microsoft Word D...	255 K
Support Model v3 revised 6.22	6/28/2017 8:43 AM	Microsoft PowerP...	1,111 K
Customer Signoff Signature	6/21/2017 8:45 PM	Microsoft Word D...	12 K
PM QTR HVAC Inspection	6/21/2017 8:44 PM	Microsoft Word D...	12 K
ATCW Form	6/21/2017 8:42 PM	Microsoft Word D...	12 K
FAQ CORRIGO Australia (002)	6/14/2017 2:30 PM	Microsoft Word D...	2,613 K
Invoice App Comms to Vendors	6/9/2017 9:13 AM	Microsoft Word D...	184 K
CORRIGOPRO Quick Reference Guide	6/8/2017 11:01 AM	Microsoft Word D...	940 K
CorrioPro Invoice APP Trainina - Comms	6/5/2017 4:35 PM	Microsoft Word D...	184 K

File name: PM QTR HVAC Inspection

Open Cancel

INVOICE DATE 30/01/2018
INVOICE # IAG023020C USE WO#

QTY	RATE	SUBTOTAL	
1	\$100.00	\$100.00	DELETE
4.50	\$25.00	\$112.50	DELETE
1	\$55.00	\$55.00	DELETE
1	\$0.00	\$0.00	

TAX \$26.75
TOTAL \$294.25

UPLOAD YOUR ATTACHMENTS
or drag and drop it here

- The system will take you to your computer's document library
- Click on the file you wish to attach or you can drag and drop the file into your invoice
- Attach as many files as needed

Invoicing App: Work Order Completion Details

Work order completion details can be added in the invoice by clicking on “WORK ORDER COMPLETION DETAILS”

Invoice for Work Order #Cor0054 DRAFT

CUSTOMER APAC PRO

LAST UPDATE DATE 12/11/2018 INVOICE DATE 19/11/2018

NTE \$250.00 AUD INVOICE # Cor0054 USE WO#

TIME ON SITE -- VIEW

INVOICE BY 04/12/2018 12:00 AM

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Bundled "Hard" Ser...	Type in work details here	1.00	\$90.0000	\$90.00
Please select		1.00	\$0.0000	\$0.00

DISCOUNT None TAX \$9.00 AUD

TOTAL \$99.00 AUD

WORK ORDER COMPLETION DETAILS

REPAIR CATEGORY Equip>Electrical WORK DONE DESCRIPTION Work completed

REPAIR CODE Closed (Circuit)

Click on “REPAIR CATEGORY” and “REPAIR CODE” to add in the details
Type work order form drop down box
Type completion details in text box

Invoice for Work Order #Cor0054 DRAFT

CUSTOMER APAC PRO

LAST UPDATE 19/11/2018 INVOICE DATE 19/11/2018

None INVOICE # Cor0054 USE WO#

Not a Failure

Corrigo-GL] Test no codes

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Bundled "Hard" Ser...	Equip>Catastrophic Event	1.00	\$90.0000	\$90.00
Please select	Equip>Commissioning	1.00	\$0.0000	\$0.00

DISCOUNT None TAX \$9.00 AUD

TOTAL \$99.00 AUD

WORK ORDER COMPLETION DETAILS

REPAIR CATEGORY Equip>Electrical WORK DONE DESCRIPTION Work completed

REPAIR CODE Closed (Circuit)

Invoicing App: Work Order Print Out

Invoice for Work Order #Cor0054 DRAFT

CUSTOMER APAC PRO
LAST UPDATE DATE 19/11/2018
NTE \$250.00 AUD
TIME ON SITE -- VIEW
INVOICE BY 04/12/2018 12:00 AM

INVOICE DATE
INVOICE # Cor0054 USE WO#

EXPORT PRICE LIST
PRINTOUT

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Bundled "Hard" Ser...	Type in work details here	1.00	\$90.0000	\$90.00
Please select		1.00	\$0.0000	\$0.00

DISCOUNT

TAX \$9.00 AUD
TOTAL \$99.00 AUD

WORK ORDER COMPLETION DETAILS
ATTACHMENTS
ACTION HISTORY

Open an invoice
Click on orange drop down
box to print out invoice

11/19/2018 Invoice #Cor0054 Printout

**CORRIGOPRO**
David's HVAC
1234 Dnytro Str, Homebush, NSW 2140, AU

INVOICE
WO Cor0054

Customer APAC PRO
Space Alpharetta Office
Site 1111 Alderman Drive, Suite 210,
Alpharetta, Ga 30005, US
NTE \$250.00 AUD

Invoice Date 19/11/2018
Invoice # Cor0054

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Bundled "Hard" Services - ACT, NSW, QLD, VIC, TAS - Aggressive Technician - Billing unit - OT Rate - Taxable	Type in work details here	1.00	\$90.00 AUD	\$90.00 AUD
Subtotal				\$90.00 AUD
Tax				\$9.00 AUD
Total				\$99.00 AUD

Work Done Description: Work completed

If you have any questions, please call +61 2 3028 2749

https://apac-desktop.corrigopro.com/Invoicing/Invoicing/Printout?invoiceId=138951

1/1

Print out invoice as needed

Invoicing App: Bulk Invoice Import Template

IMPORT INVOICES **DOWNLOAD INVOICE TEMPLATE**

Search Invoice STATUS: Draft CUSTOMER: Any MORE FILTERS

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
IAG0230105	CUSTOMER	15/12/2017	IAG0230105	11/05/2017	\$550.00	Draft	EDIT
IAG0230137	CUSTOMER	15/12/2017	IAG0230137	28/06/2017	\$550.00	Draft	EDIT
IAG0230147	CUSTOMER	15/12/2017	IAG0230147	11/05/2017	\$251.00	Draft	EDIT
IAG0230165	CUSTOMER	15/12/2017	IAG0230165	29/06/2017	\$339.35	Draft	EDIT
IAG0230166	CUSTOMER	15/12/2017	IAG0230166	28/06/2017	\$276.10	Draft	EDIT

Invoices per page: 5 Showing Invoices 1 to 5 of 24

- To import multiple invoices at one time you will need to use the Invoice Template
- Click on “DOWNLOAD INVOICE TEMPLATE”

IMPORT INVOICES **DOWNLOAD INVOICE TEMPLATE**

Search Invoice STATUS: Draft CUSTOMER: Any MORE FILTERS

WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	TOTAL	STATUS	ACTION
IAG0230105	CUSTOMER	15/12/2017	IAG0230105	11/05/2017	\$550.00	Draft	EDIT
IAG0230137	CUSTOMER	15/12/2017	IAG0230137	28/06/2017	\$550.00	Draft	EDIT
IAG0230147	CUSTOMER	15/12/2017	IAG0230147	11/05/2017	\$251.00	Draft	EDIT
IAG0230165	CUSTOMER	15/12/2017	IAG0230165	29/06/2017	\$339.35	Draft	EDIT
IAG0230166	CUSTOMER	15/12/2017	IAG0230166	28/06/2017	\$276.10	Draft	EDIT

Invoices per page: 5 Showing Invoices 1 to 5 of 24

InvoiceTemplate (3).zip

- The “Invoice Template” will appear in the lower left hand corner of your screen
- Click to open the template

Invoicing App: Bulk Invoice Import Template

	A	B	C	D	E	F	G	H
1	Work Order Number	Invoice Number	Invoice Date	Category/Item	Description	Quantity	Rate	Subtotal
2	8743	231	5/1/2016	Labor	back restroom and found	2.50	75.50	188.75
3	8743	231	5/1/2016	Labor	Handyman Services	1.00	65.00	65.00
4	43982	732	5/5/2016	Labor	Water heater installation	6.00	195.00	1,170.00
5	43982	732	5/5/2016	Parts & Materials	40-gallon Electric Water Heater	1.00	900.00	900.00
6	43982	732	5/5/2016	Miscellaneous	Trip charge	1.00	100.00	100.00
7	43982	732	5/5/2016	Miscellaneous	Administrative Fee	1.00	40.00	40.00
8	43982	732	5/5/2016	Tax	Tax	1.00	83.25	83.25

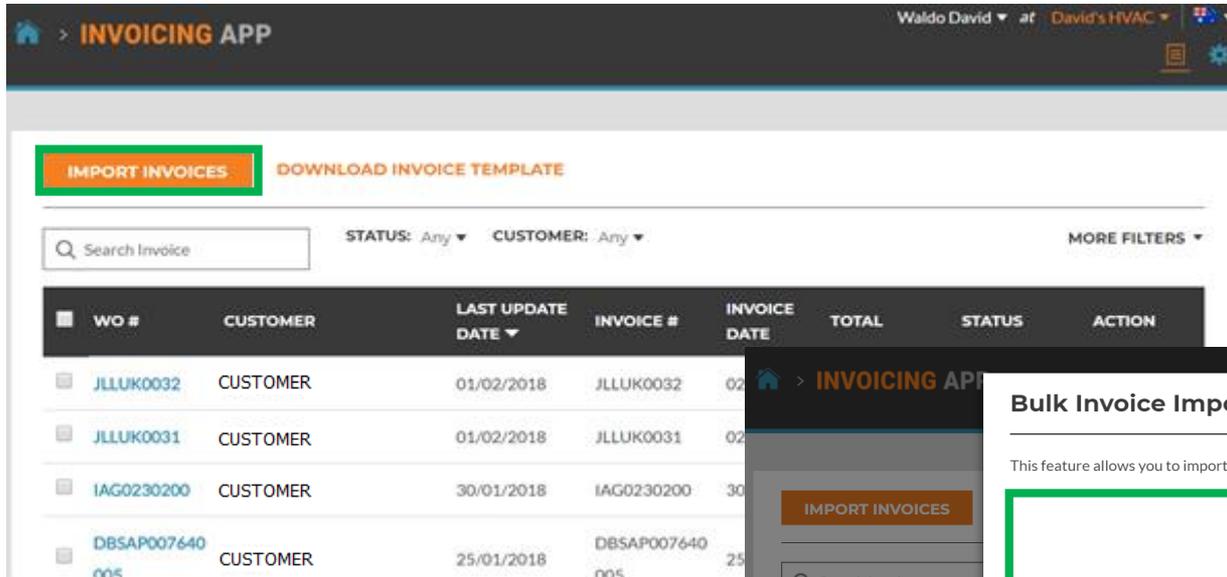
- You need to fill in the required data fields above
- DO NOT ADD any additional fields to the template

Things to Remember

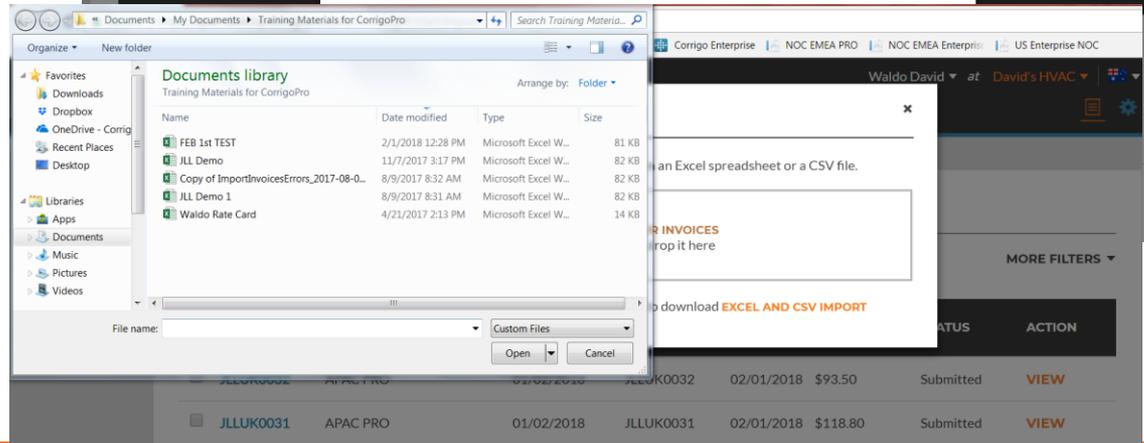
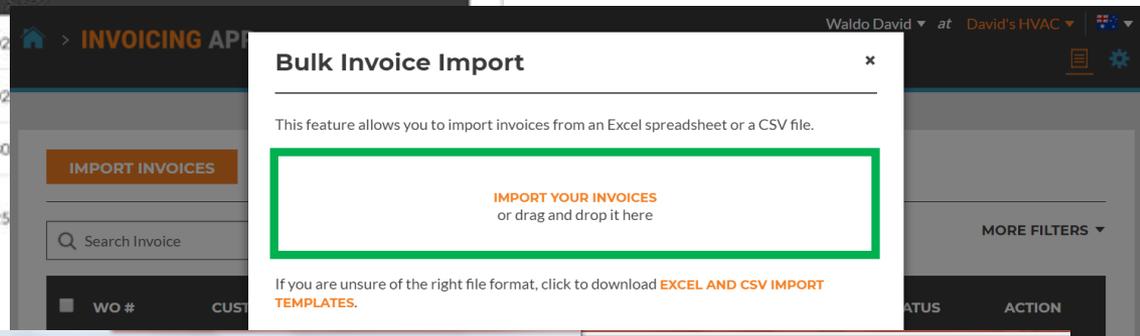
- ✓ If rate card is being used, Category/Item must match rate card
 - ✓ When itemizing, dates must match
 - ✓ Invoice has to be within NTE
 - ✓ Taxes must be applied
- Click on the "Help" tab to view details for filling out the template

	A	B	C	D	E	F	G	H
4	customers.							
5	This file InvoiceTemplate.xlsx contains two example invoices in the Invoices sheet. Before using this file for importing real invoices delete these example invoices. The two example invoices have numbers 231 and 732. Invoice #231 has two labor line items and no tax.							
6	Invoice #732 has 5 line items including tax.							
7								
8								
9	There is no limit on the number of invoices that can be included per file. You can include invoices for different CorrigoPro customers in the same file.							
10								
11	<u>Invoice Fields</u>							
12								
13	All invoice fields are required. The first 3 fields, Work Order Number, Invoice Number and Invoice Date, are duplicated for each invoice line item.							
14								
15								
16	The Excel format for each column is indicated in parentheses after the column name.							
17								
18	Work Order Number (Text) - the received CorrigoPro work order number.							
19								
20	Invoice Number (Text) - your invoice number. This can be any alphanumeric string from 1 to 32 characters in length. All invoice numbers for a given CorrigoPro client must be unique.							
21								
22	Invoice Date (Date) - your invoice date.							
23								
24	Category/Item (Text) - this must exactly match a valid Category/Item for this invoice. Category/Item values can differ per customer and, in unusual circumstances, different invoices for the same customer can require different Category/Items. To see the list of valid Category/Item values open the invoice page in the CorrigoPro Invoice App UI and select the Category/Item dropdown.							
25								
26								
27	Description (Text) - your additional description for the Category/Item. You can enter any description up to 1024 characters in length.							
28								
29	Note - for Canada if the Category/Item is "Tax" then the Description must be "HST", "PST", "GST" or "QST". For other countries the description can be left empty (this is the only time a field can be left empty apart from the case of zero invoices - see FAQ section).							
30								
31								
32	Quantity (Number) - any non-zero integer or decimal number. For category "Labor" this should correspond to the hours and minutes in decimal format, e.g. 2 hrs is 2 or 2.0, 2 hrs 30 minutes is 2.5, etc.							
33								
34	Rate (Number) - do not include the currency type. CorrigoPro will automatically decide the currency type based on the location of the							
35								

Invoicing App: Importing Invoices

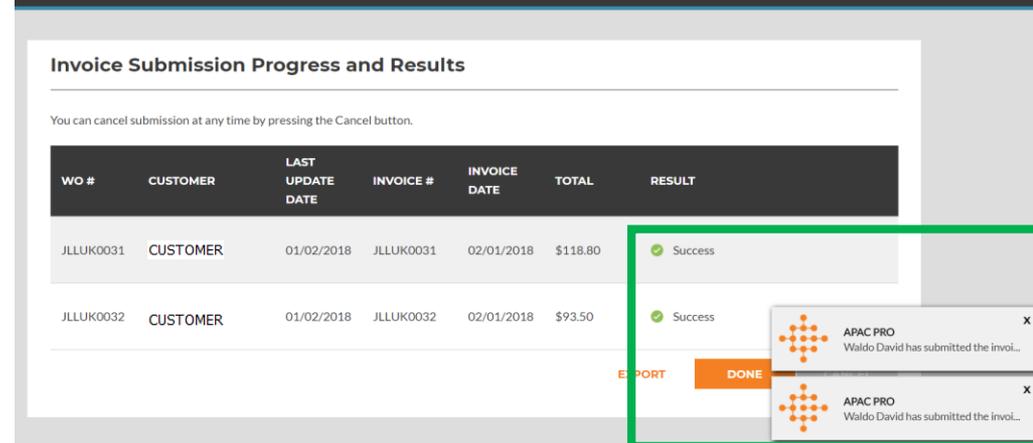
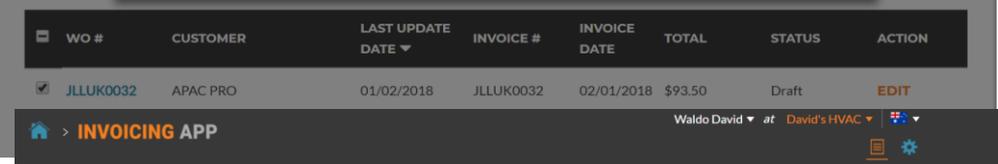
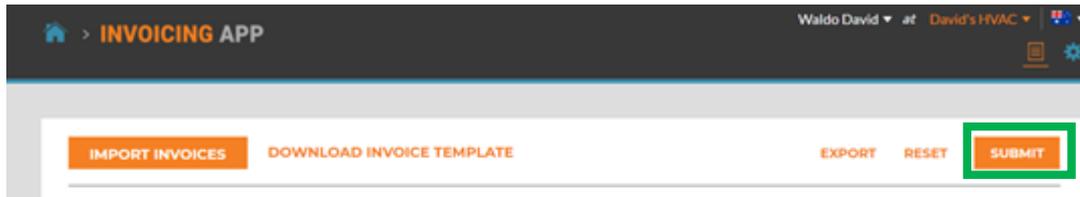


- In the Invoicing App click on the “IMPORT INVOICES” button
- “IMPORT YOUR INVOICES” box will be displayed, shown below



- Click on “IMPORT YOUR INVOICES”
- A window will open to view your Documents library
- Click on or drag and drop your saved import template
- This will start the import process

Invoicing App: Submit Bulk Imported Invoices



- Imported invoices can now be submitted for payment, they will have a check next to them, shown above
- Click the “SUBMIT” button
- You are asked if you are sure you want to submit the invoices, click “YES”
- 2 invoices have been submitted successfully

Questions

Contact Corrigo via phone or online:

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