



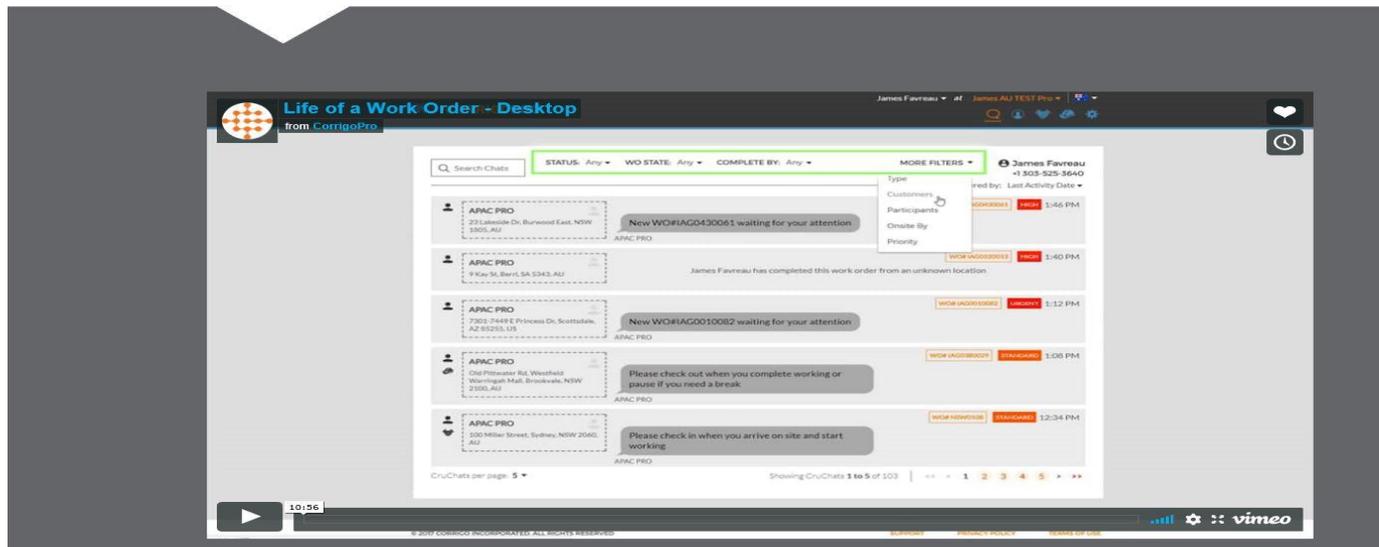
CORRIGOPRO

使用CorrigoPro Desktop管理工单
工单的全生命周期-PC端

连接到CorrigoPro & 管理工单-桌面

Manage Work Orders – Desktop

DOWNLOAD PDF



将此链接复制到您的浏览器，并观看有关如何以英语讲解
Manager Work Orders-Desk Top的视频，或按Enter键观看演示

<https://helpcorrigo.wpengine.com/videos/manage-work-orders-desktop/>

在本教程中，我们将介绍.....。

- 登录到CorrigoPro Desktop Slide 3
- 查找工作订单幻灯片4 -7
- 打印工作单幻灯片8
- 查看新的工作单幻灯片9
- 随附的留言幻灯片10
- 联系服务位置幻灯片11
- 服务水平协议（SLA）幻灯片12
- 不超过（NTE）/报价幻灯片13-15
- 接受或拒绝工作单幻灯片16
- 附加文档幻灯片17
- 分配工作单幻灯片18 – 19
- 签入幻灯片20
- 暂停工作单幻灯片21
- 签出幻灯片22
- 维修类别/维修代码幻灯片23-24
- 工作验证和评分幻灯片25
- CruChat链接幻灯片26
- 动作和筛选器幻灯片27-33
- 数据表幻灯片34 – 36
- 设置：警报/捕获客户
- 签名幻灯片37 – 38

登录到您的CorrigoPro桌面

CorrigoPro桌面登录页面URL- <https://login.corrigo.com/connect/login>

CORRIGOPRO
DESKTOP

登录到您的CorrigoPro
桌面使用您的电子邮件
地址和密码，在注册时
设置

EMAIL test@Corrigo.com

PASSWORD

REMEMBER ME

LOGIN

[FORGOT YOUR PASSWORD?](#)

然后点击“登录”

查找工作单

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

● Waiting for Acceptance ● Open
● Open: In Progress ● Completed

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

从你的
CorrigoPro桌面,
点击
CorrigoPro瓷贴

查找工作单

Search Chats

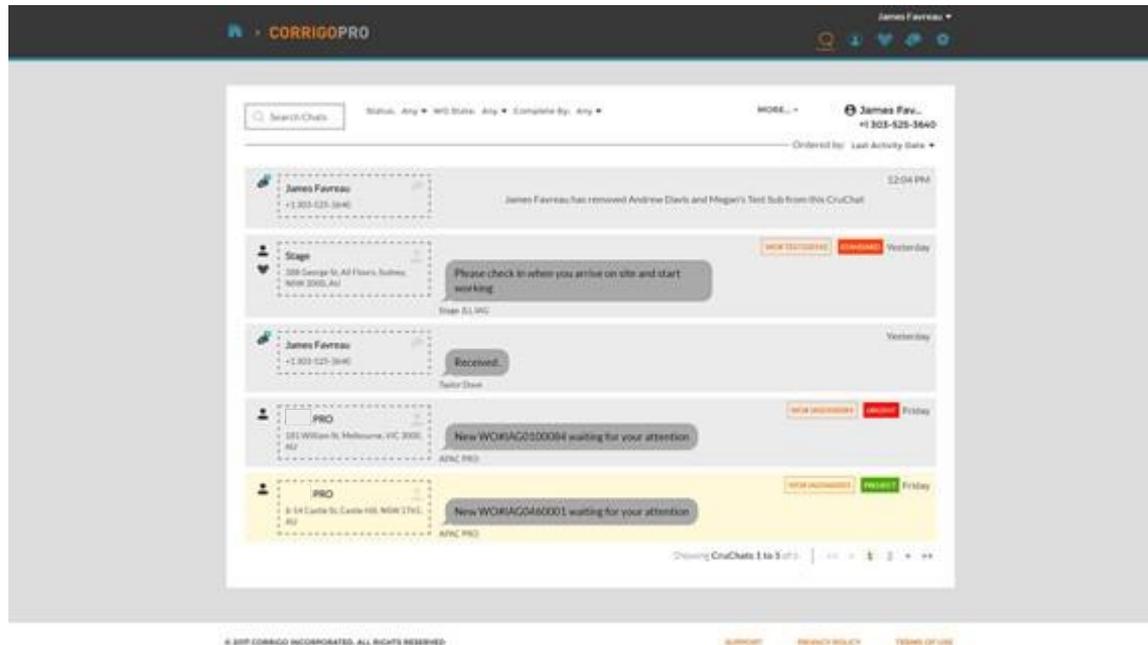
Status: Any WO State: Any Complete By: Any

MORE...

James Fav...
+1 303-525-3640

Ordered by: Last Activity Date

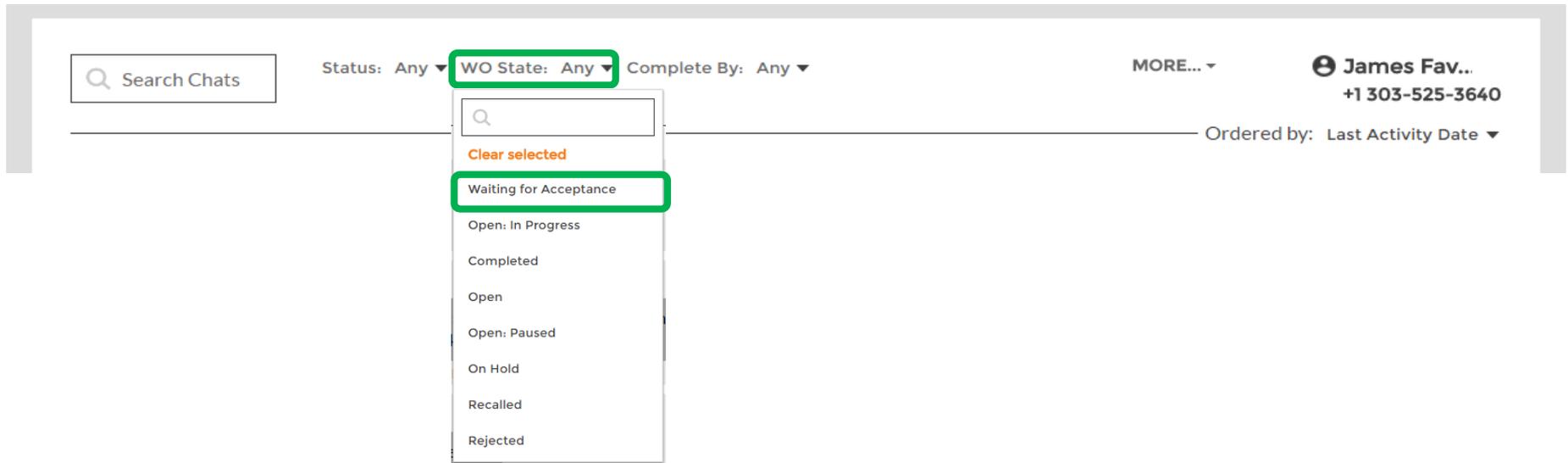
在CruChat页面的顶部，您会找到可点击的菜单，允许您搜索和过滤CruChats。



您将被带到CruChats页面，在此页面上，您将能够查找您的关联客户发送的所有工作订单

查找工作单

强大的过滤器选项使您可以轻松分类CruChats和工单
让我们寻找仍在等待接受的工作单



要查找尚未接受工作指令的任何CruChats，
单击“WO状态”菜单，单击“等待接受”

查找工作单

🔍 Search Chats

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



Ordered by: Last Activity Date ▼

- APAC Demo

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

WO# COR0081 WAITING FOR ACCEPTANCE URGENT 09/10/2018

New WO#Cor0081 is awaiting your attention

APAC Demo
- David Waldo

+1804-517-8865

Got it.

Thomas Fowler

灰色的已经打开

10/04/2018
- David Waldo

+1804-517-8865

Your test is working!

Thomas Fowler

09/04/2018
- David Waldo

+1804-517-8865

James Favreau has been removed

黄色的CruChat框尚未打开或有新的需要阅读的信息

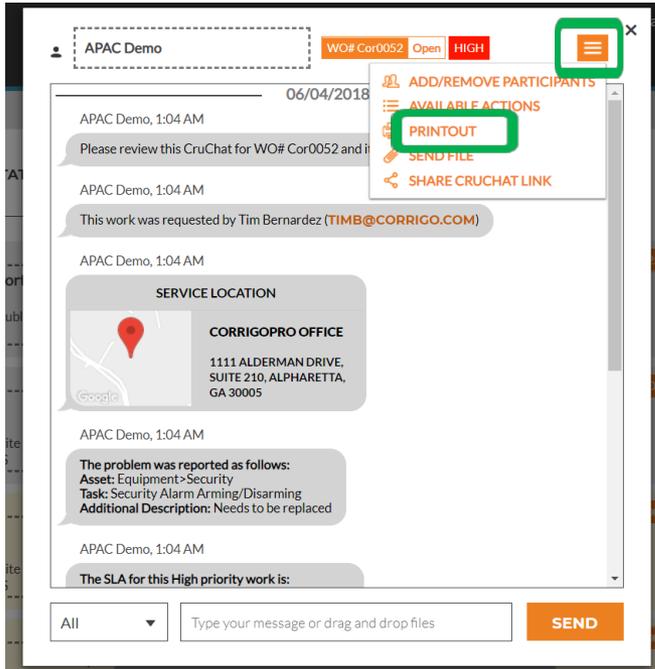
09/04/2018
- David Waldo

+1804-517-8865

James Favreau has been removed

09/04/2018

打印工作单



点击您的工作订单
希望打印

点击下拉框

单击“打印输出”以打
印选定的工作订单

11/15/2018 Work Order #Cor0052 Printout

CORRIGOPRO

David's HVAC
1234 Dmytro Str, Homebush, NSW 2140, AU
(02) 3428 5749
For APAC Demo

WORK ORDER #COR0052

Date Created: 6/04/2018 1:04:00 AM **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.

Customer

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

Problem

Equipment > Security
Security Alarm Arming/Disarming
Needs to be replaced

Details

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		

Note

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

STANDARD PROCEDURES AND TERMS:

<https://apac-desktop.corriGo.com/ServiceChat/Chat/Printout/7964a709-5839-e811-80cf-a0369903144>

1/2

审核新工作单

工作订单的所有详细信息是包含在CruChat中
每个已经确认动作的时间和日期可单击工作订单中的橙色文本
首先，滚动到工作订单的顶部
单击“消息”链接以显示与作品有关的信息
订单，由客户输入

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. A date separator '09/10/2018' is centered above the chat messages. The chat history includes several messages from 'APAC Demo, 6:23 AM':
1. A message asking to review a CruChat for WO# Cor0081, with a green box highlighting a 'MESSAGE' link.
2. A message stating the work was requested by Tim Bernardez (TIMB@CORRIGO.COM) and includes a link to update 'APPOINTMENT INFO'.
3. A 'SERVICE LOCATION' card featuring a map of 'CORRIGOPRO OFFICE' at 1111 ALDERMAN DRIVE, SUITE 210, ALPHARETTA, GA 30005.
4. A message detailing the problem: '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'.
At the bottom, there is a navigation bar with an 'All' dropdown menu, a text input field with the placeholder 'Type your message or drag and drop files', and a prominent orange 'SEND' button.

伴随讯息

客户联系信息，工作说明，
也可能包含具体的工作流程或步骤

退出消息框返回
工作单，直接点击“关闭”

WO #Cor0081 Accompanying Message

Property: Corrigo alpharetta
Location: Alpharetta Office
Customer Contact: Tim Bernardes
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.

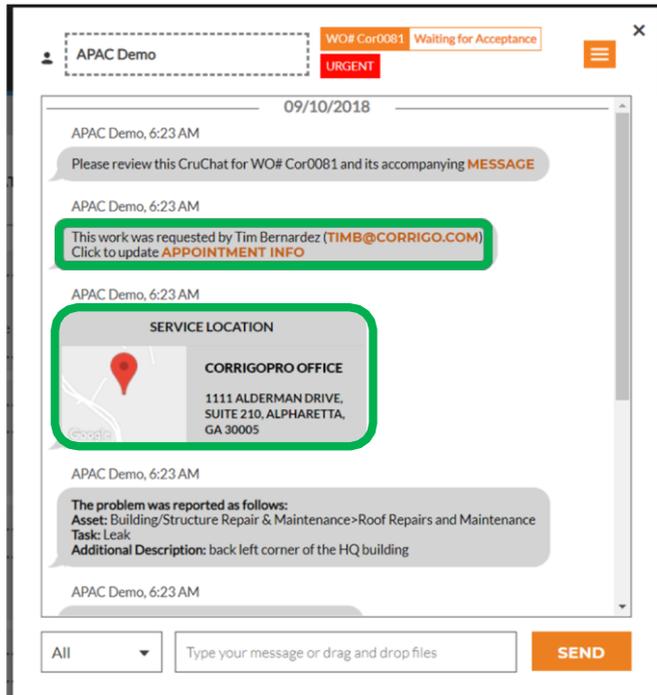
For assistance or additional information related to this work order, please contact the JLL Property Service Centre at 1800 063 841.

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:

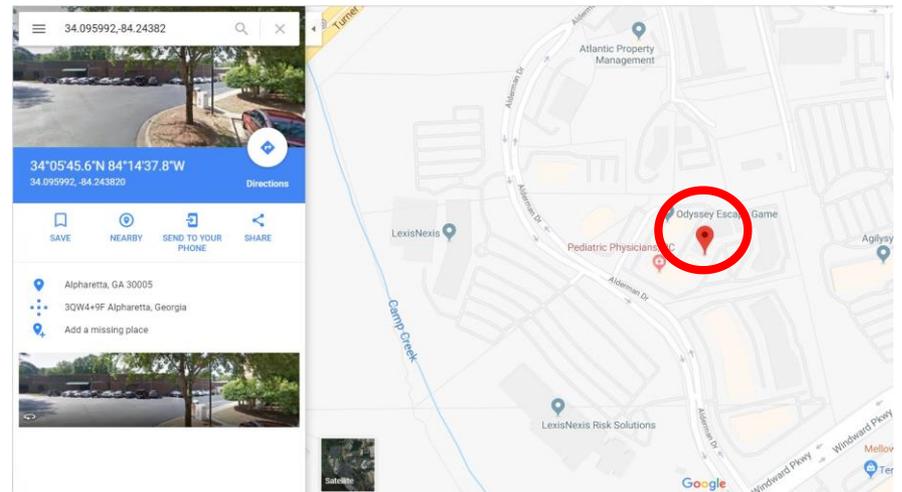
[GOOGLE TRANSLATE](#) [CLOSE](#)

站点联系和服务位置



接下来，您将看到客户的站点联系人，
可点击的电子邮件或电话号码链接
接下来是服务位置的交互式地图链接

点击地图链接将打开
PC上的本机应用程序，以允许地图程序
显示您客户的地址



问题和SLA

在服务位置下方，您将找到报告的问题描述和请求的任务

服务水平协议（SLA）

请注意，您的客户会按照SLA时间表对您的能力进行评分

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 'CUSTOMER' and reads: 'The problem was reported as follows: Asset: Landscaping, Task: Trees & Shrubs, Additional Description: maintenance and replacement', timestamped '3:11 PM'. The second message, also highlighted with a green border, is from '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', timestamped '3:11 PM'. The third message is from 'CUSTOMER' and reads: 'You cannot invoice us more than \$250.00 for this work. Click [HERE](#) if you need this increased', timestamped '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 : 不超过

接下来，您将看到“NTE金额（不能超出金额）”的工作指示

NTE金额是客户给与该项服务的维修或维护服务设定最高费用

如果您需要增加到NTE金额，请单击在“**HERE**”链接上，“提交报价”框将会出现

The screenshot shows a service request interface for 'APAC Demo'. At the top, there is a header with 'APAC Demo' in a dashed box, 'WO# Cor0081' in an orange box, and 'Waiting for Acceptance' in a white box. Below this, there is a red 'URGENT' button and a hamburger menu icon. The main content area contains a chat log with the following messages:

- APAC Demo, 6:23 AM: 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
- 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: You cannot invoice us more than \$500.00 AUD for this work. Click **HERE** if you need this increased
- 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

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 red 'SEND' button.

提交报价

输入报价
请求的服务，以及
说明理由
报价金额

然后点击“提交”

客户将收到通知
要求增加NTE，客户将审核您的报
价，可能
接受或拒绝您的报价

The screenshot shows a 'Submit Quote' form with the following fields and buttons:

- AMOUNT:** A text input field containing '\$840.00 AUD', which is highlighted with a green border.
- DESCRIPTION:** A text area containing the text 'Additional labor and parts'.
- Buttons:** 'CANCEL' and 'SUBMIT' (highlighted with a green border).
- Footer:** 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.
- Chat Window:** A chat window is visible at the bottom, showing a message from 'APAC Demo, 6:23 AM' that says 'Click to ACCEPT or REJECT WO #Cor0081? Any questions? Send a message'.

接受报价和新的NTE

要求的NTE的详细信息
实际记录增加
时间，在CruChat中
在此示例中，客户已批准报价，
并且报价金额现在显示是更新的
NTE金额

The screenshot displays a chat window for 'APAC Demo' with a 'Waiting for Acceptance' status and 'URGENT' priority. 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.

接受工作单

在原始CruChat的底部
工作订单详细信息，系统将
提示您“接受”或
“拒绝”工单

直接单击“接受”接受工作订单，或
单击“拒绝”拒绝工作订单

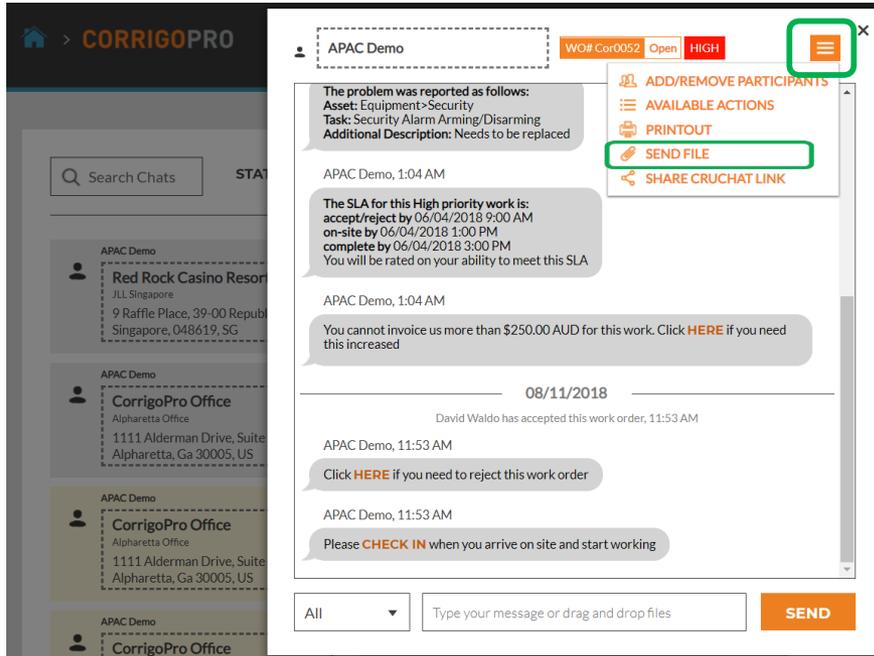
该动作将带有时间戳记录到
CruChat中，客户将
被通知他们的工作订单是否被接
受或拒绝

如果您接受工作单，并到达客户站点
可点击“签入”并开始提供服务

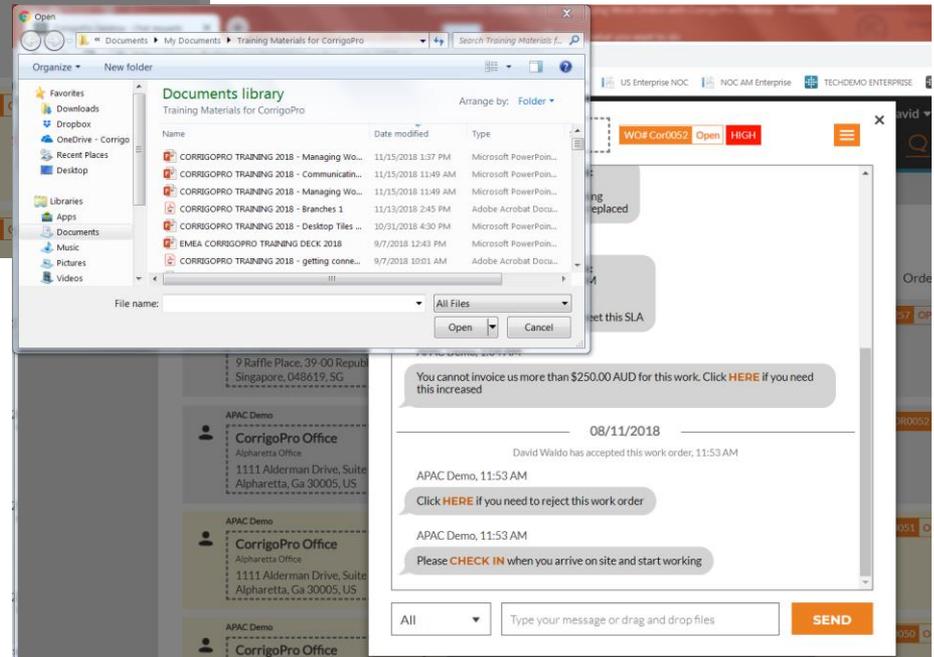
The screenshot shows a chat window for a work order (WO# Cor0081) with a status of 'Waiting for Acceptance' and a priority of 'URGENT'. The chat log includes the following messages:

- 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
- David Waldo submitted a quote for \$840.00 AUD. The current NTE is still \$500.00 AUD, 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

将文档附加到工单



点击工作单
在工作单中后，单击
在下拉菜单中
右上角
点击“发送文件”



系统将重定向到计算机的
文件库
点击您想要附加的文档
工作单

分配工作单

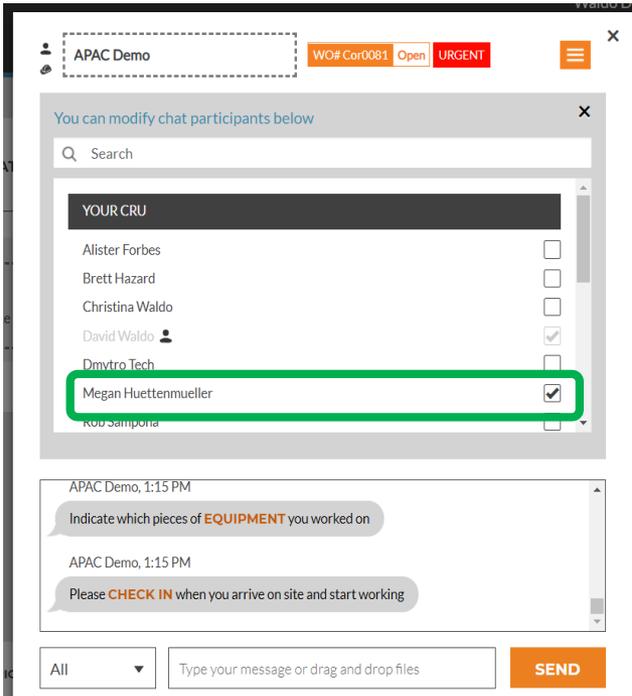
当工作单被接受时，它可以分配给现场技术人员或分包商完成工作

点击下拉菜单中的屏幕的右上角

点击添加/删除参与者以分配CruMember或分包商

The screenshot shows a work order interface for 'APAC Demo'. At the top, there is a header with 'APAC Demo' in a dashed box, 'WO# Cor0081', 'Open' status, and 'URGENT' priority. A green box highlights a menu icon in the top right corner. A dropdown menu is open, listing actions: 'ADD/REMOVE PARTICIPANTS' (highlighted in green), 'AVAILABLE ACTIONS', 'PRINTOUT', 'SEND FILE', and 'SHARE CRUCHAT LINK'. The main chat area shows a timeline of messages: 'You will be rated on your ability to meet this SLA' (6:23 AM), 'Click **HERE** to manage your invoice', a separator for 'Today', 'David Waldo submitted a quote for \$840.00 AUD. The current NTE is still \$500.00 AUD, 1:08 PM', 'Quote: \$840.00 AUD **SHOW QUOTE DETAILS**', 'David Waldo has accepted this work order, 1:15 PM', 'Click **HERE** if you need to reject this work order', 'Indicate which pieces of **EQUIPMENT** you worked on', and '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.

分配工作单



CruMembers和连接的分包商将会出现，请参见左侧的示例变灰的名称是CruLead，它们自动包含在所有CruChats中

要分配工作，请单击复选框在所需分包商的右侧或CruMember的名字

输入CruChat短信然后单击“发送”

CruChat反映了添加的CruMember和工作订单的分配



现在已分配工作订单

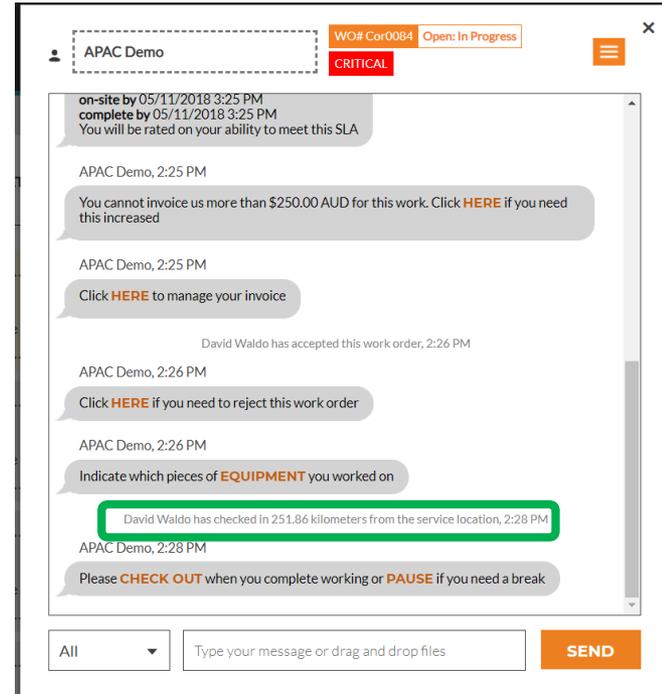
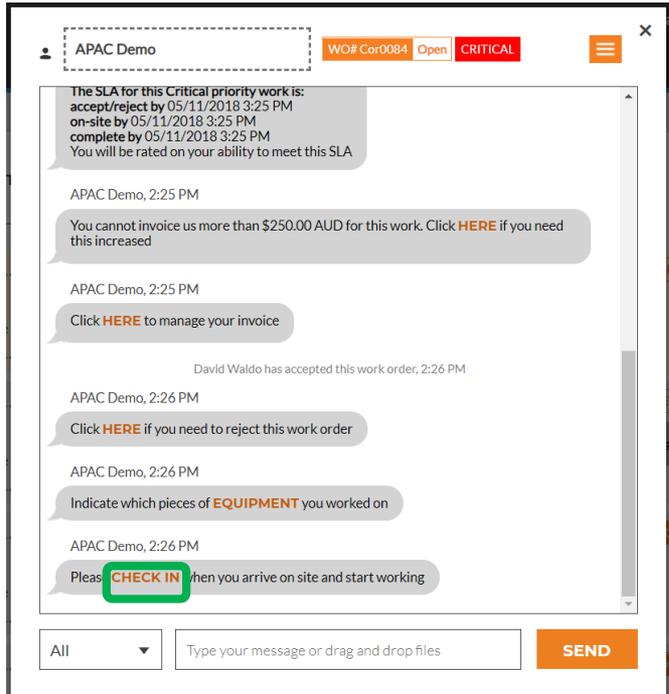
签入以开始工作单

当CruMember或Sub是分配了工作单，他们将需要签入才能开始工作单

如果在桌面中，单击橙色“签到”开始工作订购

CruChat将更新指示位置的注释
签到的人再距离服务地点多远距离开始工作

客户将知道技术员在签入时与站点一定距离，并且开始跟踪时间，以便客户和服务提供者知道完成工作需要多长时间



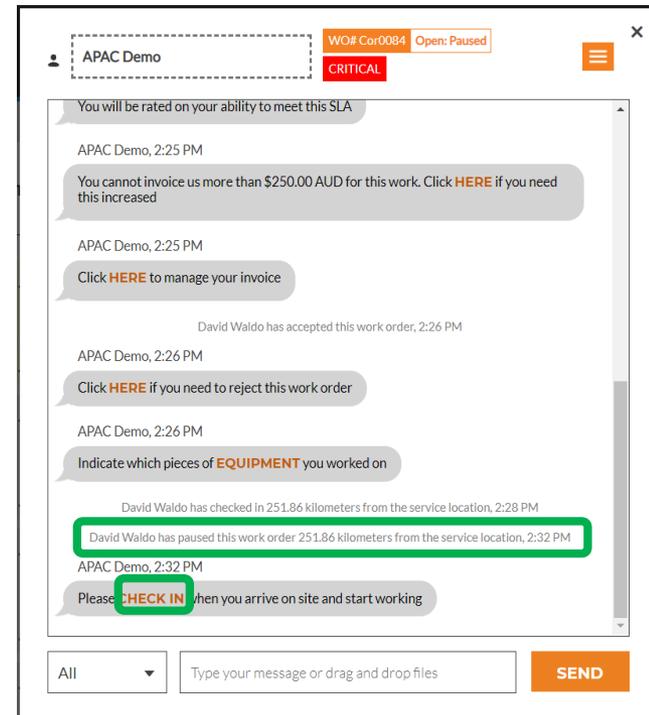
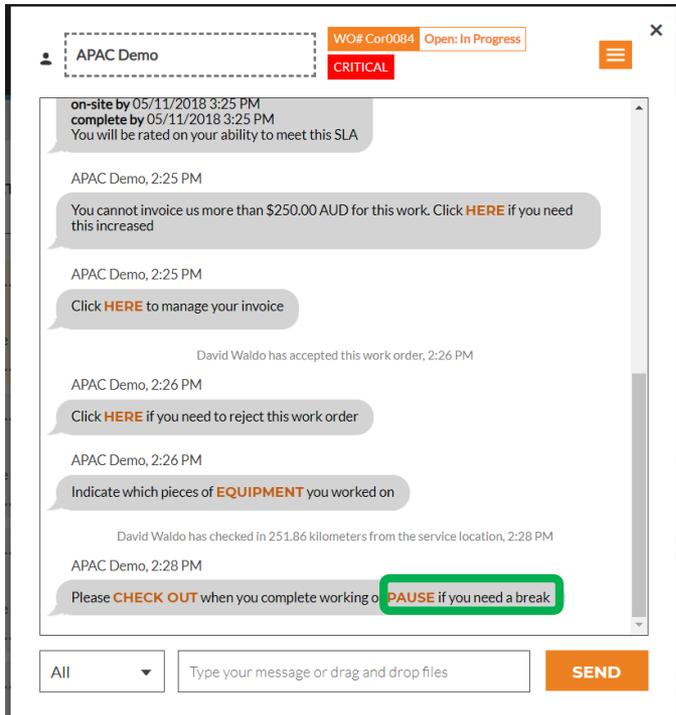
暂停工单

有时您需要
如果
技术人员休息一下或
在多天的项目中一天结束时
离开网站

点击橙色的“暂停”链接

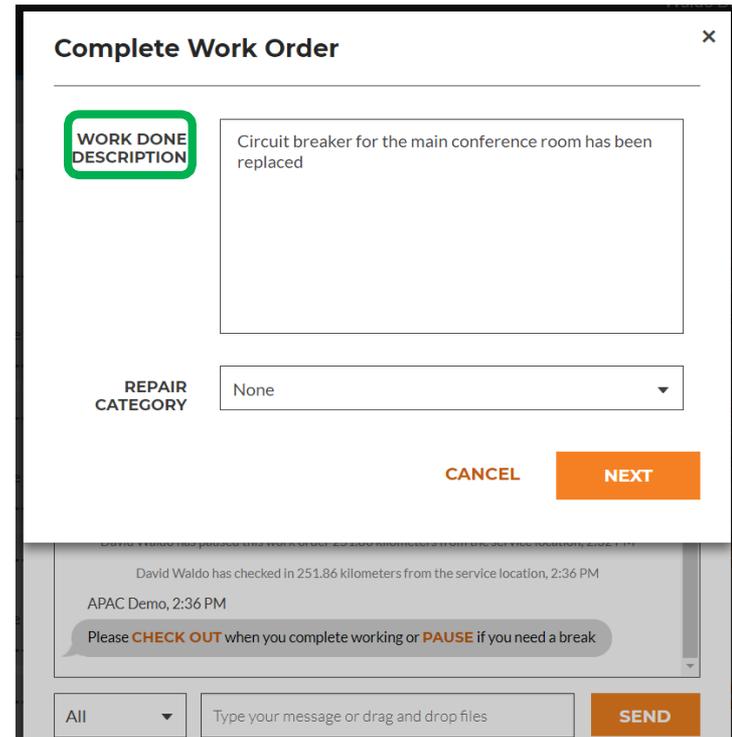
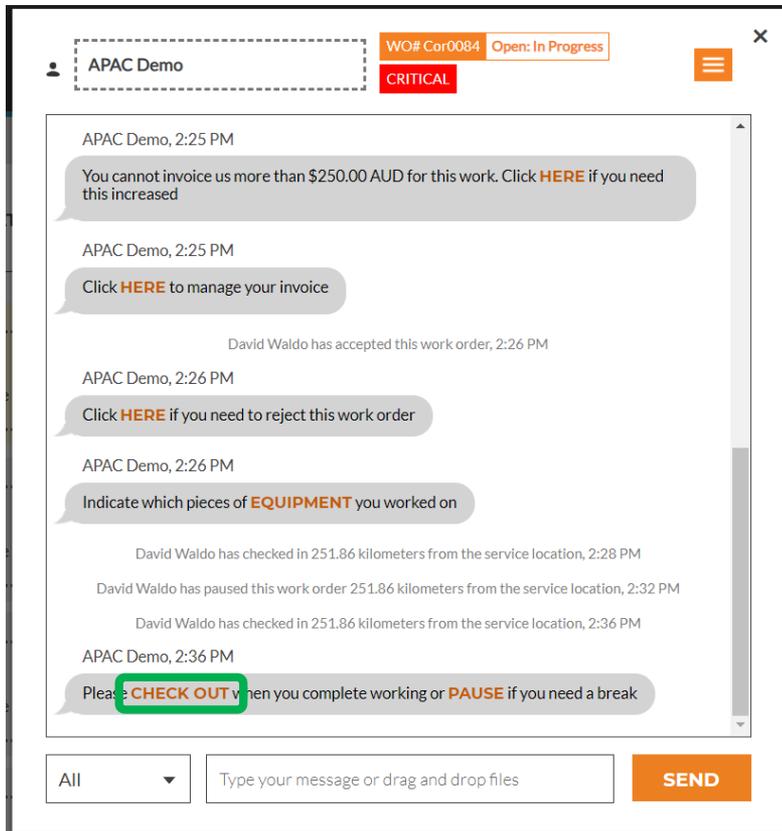
CruChat将再次
注意记录工单已被暂停
(注意暂停将不改变SLA时
间)

当技术人员准备好
他们点击的推荐工作
“报到”



签出并完成工作订单

工作完成后，请点击
橙色的“CHECK OUT”链接



“完成工作单”窗口将
打开您应该输入有关该工作的详细评
论的位置
完成。

维修类别和维修代码

输入您的评论后，选择“修复类别”
单击并访问维修类别列表

Complete Work Order

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

COMMENT

All repairs were made and product tested.

REPAIR CATEGORY

Equip>Electrical

REPAIR CODE

None

CANCEL COMPLETE

修理 分类和维修 码

然后，您将对

“维修代码”

Complete Work Order ×

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

然后点击“完成”

Complete Work Order ×

COMMENT

All repairs were made and product tested.

REPAIR CATEGORY

Equip>Electrical

REPAIR CODE

Damaged/Broken

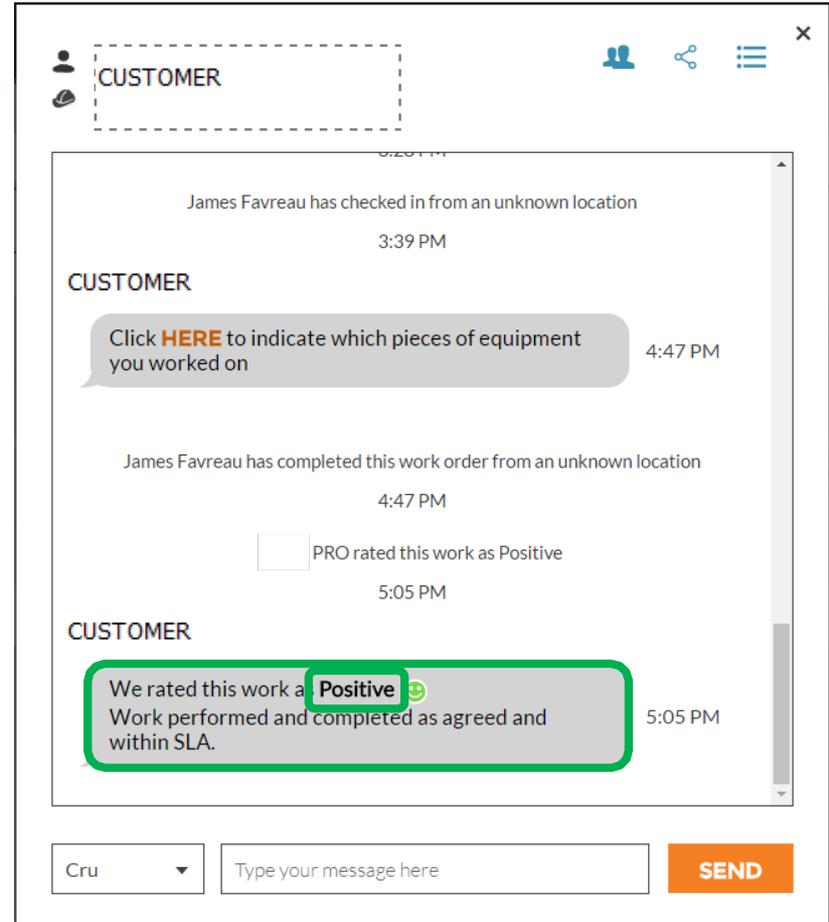
CANCEL **COMPLETE**

验证和评价工作

技术人员签出后
工单已经完成了
客户将收到通知

客户可以在他们的工作期间对工作进行
评分
验证过程，评级将
在CruChat中出现并带有注释
验证信息

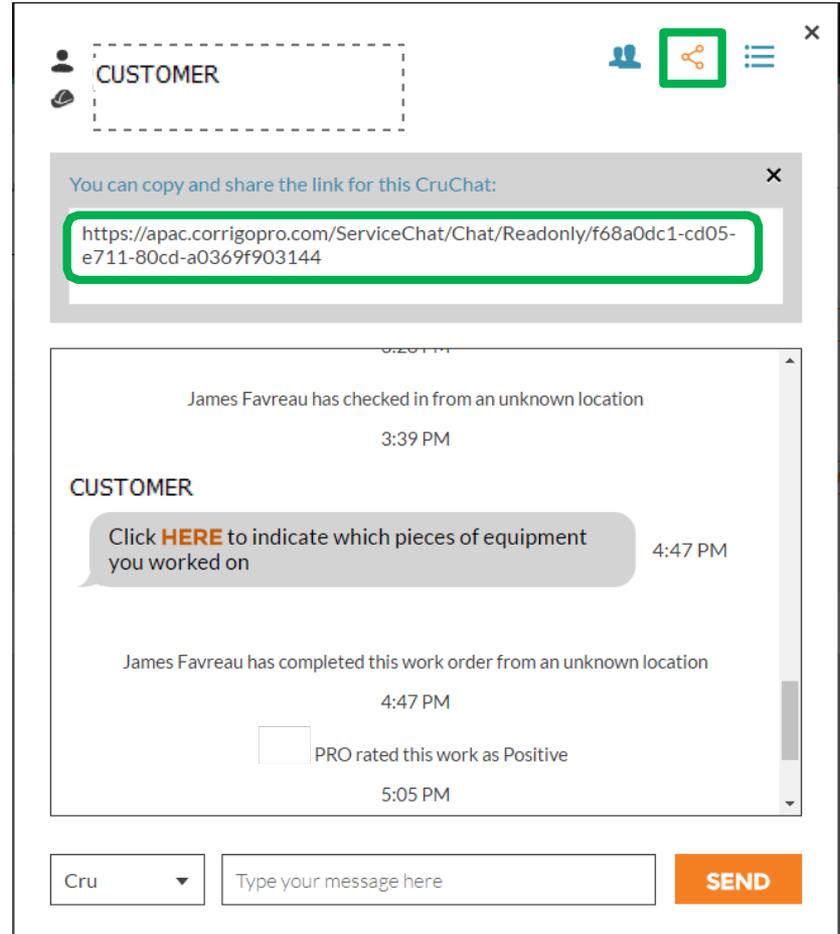
如果您的客户已实施
验证步骤是
工作订单流程，您将只能
完成验证和工作评级后向客户开具发
票



CruChat链接

通过共享CruChat对话
电子邮件或文本，单击链接图标
在CruChat的右上方
窗口
这将生成一个活动的CruChat链接，
您可以复制并粘贴该链接
由于该链接处于活动状态，因此它
将始终显示当前对话-如果对话继续，
请再次打开该链接以查看新内容

这是存档的强大工具
CruChat对话或参考
具体的工作指令和细节



动作和过滤器

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

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 **CORRIGOPRO 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

单击CorrigoPro磁贴以查看CruChats
点击橙色框以查看批量/过滤器选项

单击您要使用的选项旁边的下拉箭头：“批量操作”这将打开所选选项中的可选类别
单击CorrigoPro磁贴以查看CruChats
点击橙色框以查看批量/过滤器选项
单击您要使用的选项旁边的下拉箭头：“批量操作”这将打开所选选项中的可选类别

Waldo David at David's HVAC

Search Chats

STATUS: Any WO STATE: Any COMPLETE BY: Any

BULK ACTIONS

EXPORT

MOBILE USER INFO

MORE FILTERS

APAC Demo

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

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

APAC Demo

WO# COR0084 OPEN: IN P

APAC Demo

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

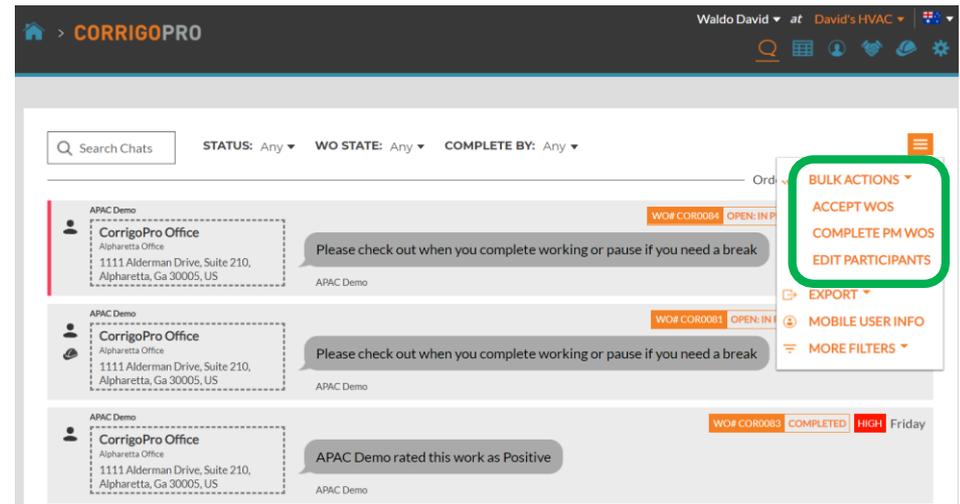
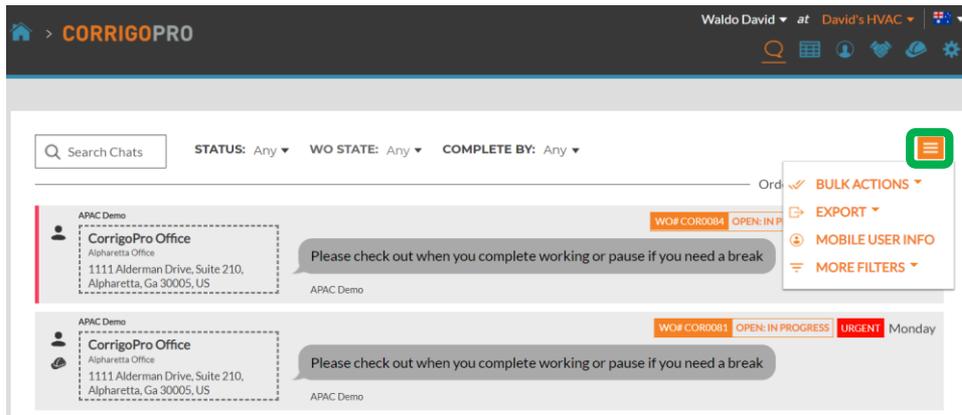
Please check out when you complete working or pause if you need a break

APAC Demo

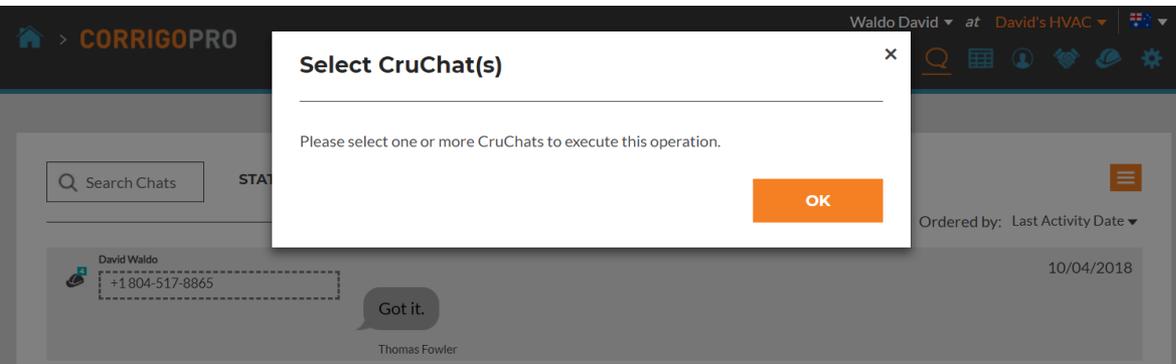
WO# COR0081 OPEN: IN PROGRESS URGENT Monday

动作和过滤器

点击橙色框以查看
批量/过滤器选项
点击旁边的下拉箭头
您希望使用的选项：“批量操作”
这将打开所选选项内的可选类别



操作和过滤器：批量接受

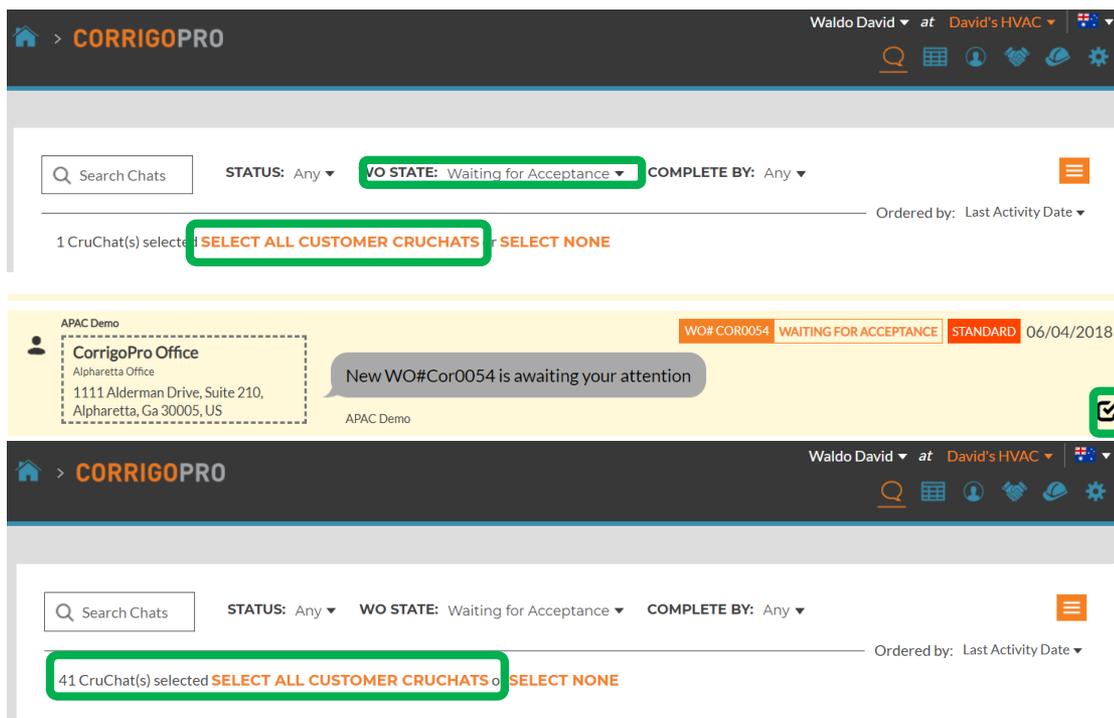


工作订单已被过滤
“等待接受”

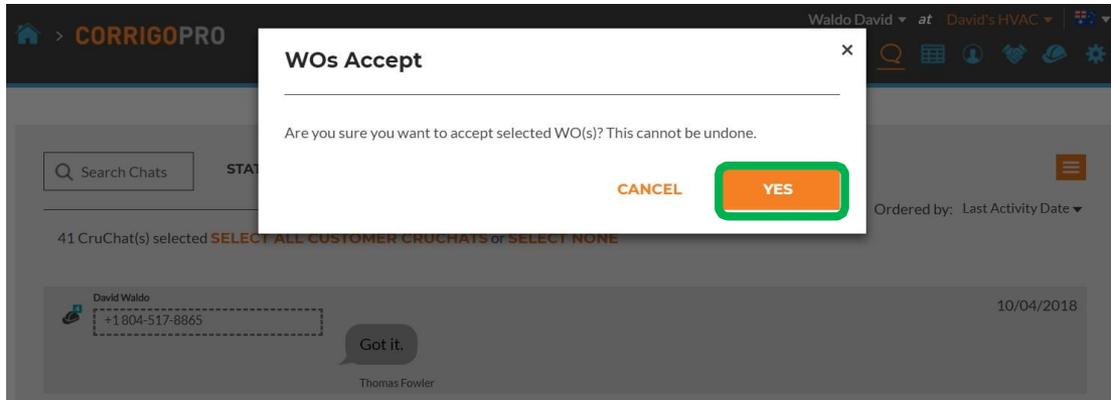
选中第一个右侧的框

工作单，等待接受，然后单击“选择所有客户小菜”

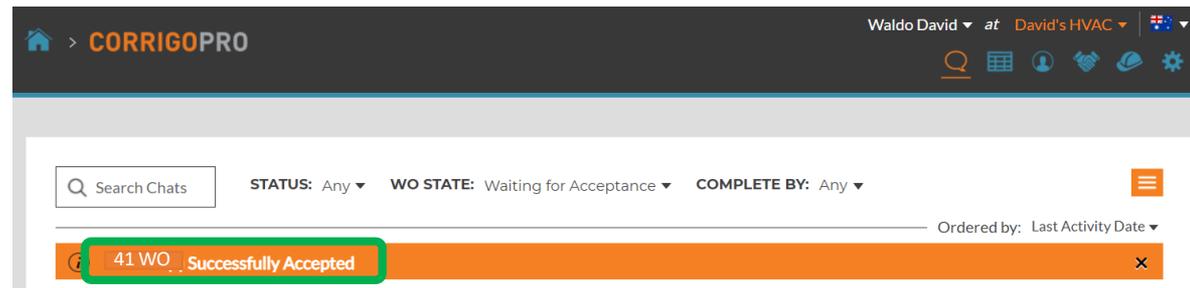
这将选择所有等待接受的工作订单



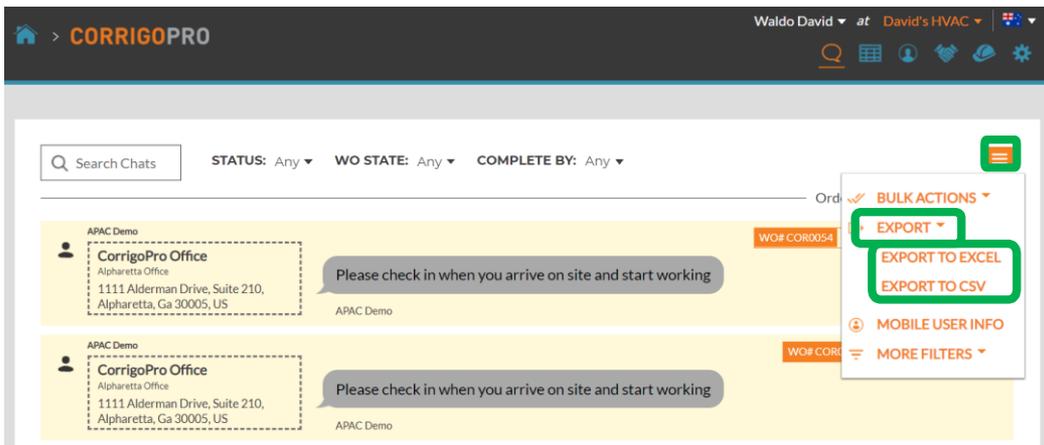
操作和过滤器：批量接受



系统询问您是否要
接受选定的工单
点击“是”
41个工作订单将被批量接受



动作和筛选器：导出



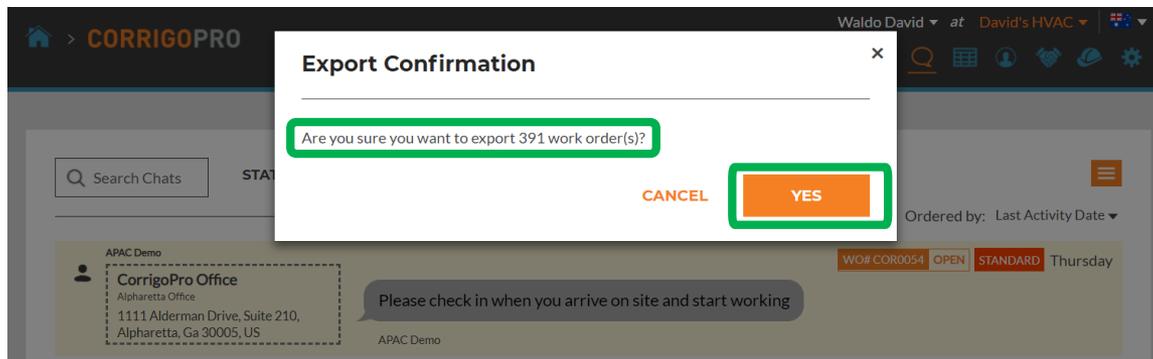
“导出”功能提供了用户能够以Excel或CSV格式导出工作订单数据

用户可以在以下位置导出所有工作订单

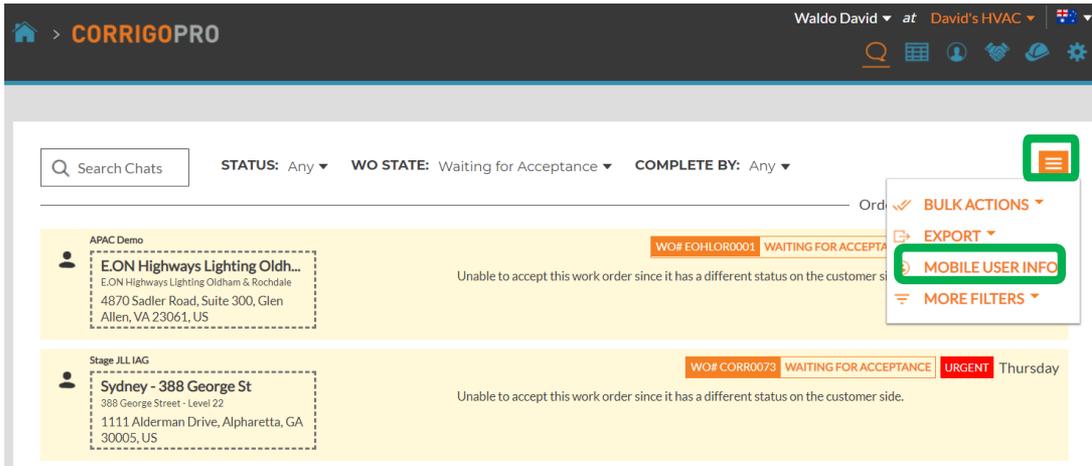
一度

导出特定工作单状态，单击“WO STATE”，在要导出的工作订单的状态旁边打勾

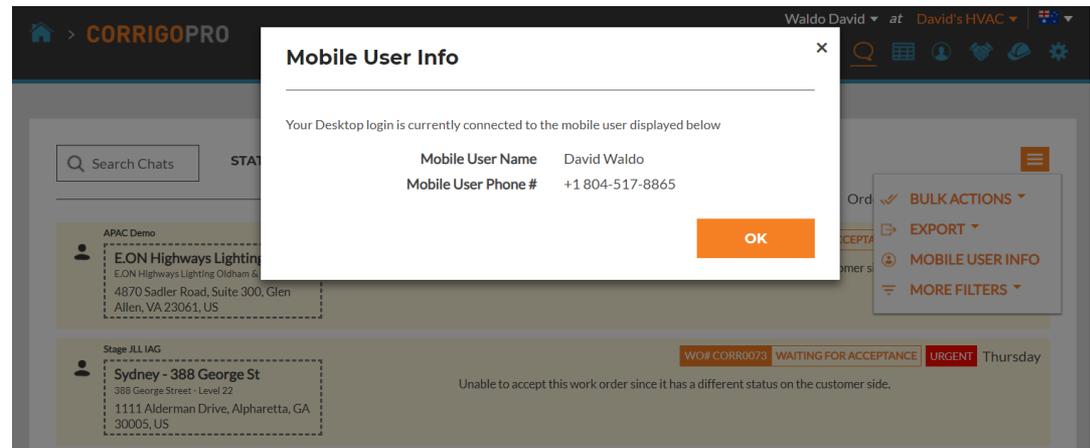
示例：WO状态为“已接受”工作订单”，则只会导出已接受的工作订单



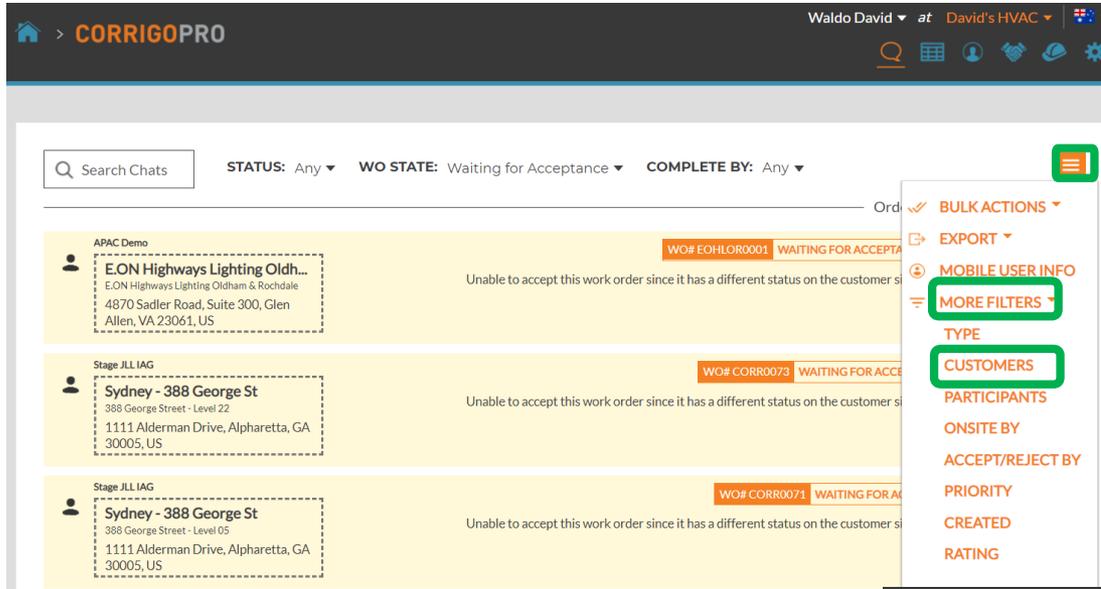
操作和过滤器：移动用户信息



系统显示信息
对于已连接的移动用户



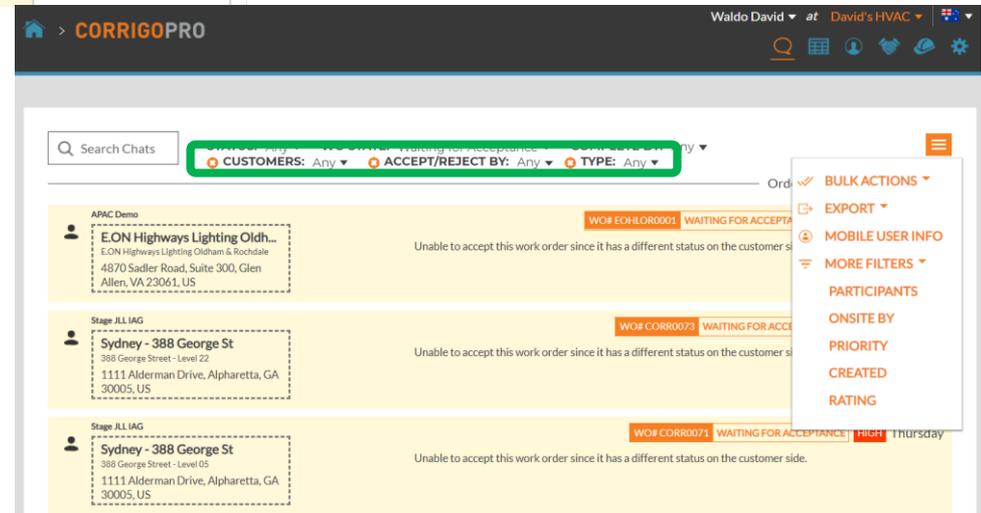
动作和过滤器：过滤器



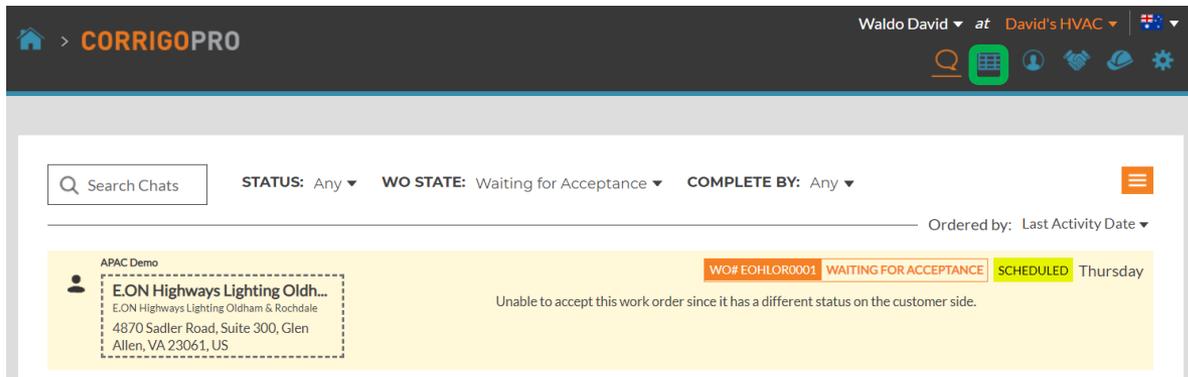
点击“更多过滤器”可以
用户添加用于提供其他详细信息的
过滤器
选定的工单

用户在此处添加了“客户”
过滤器，“接受/拒绝”过滤器和
“类型”过滤器

这允许用户使用添加的过滤器提供
的其他数据来选择工单。
单击每个旁边的橙色“X”
过滤器以除去过滤器

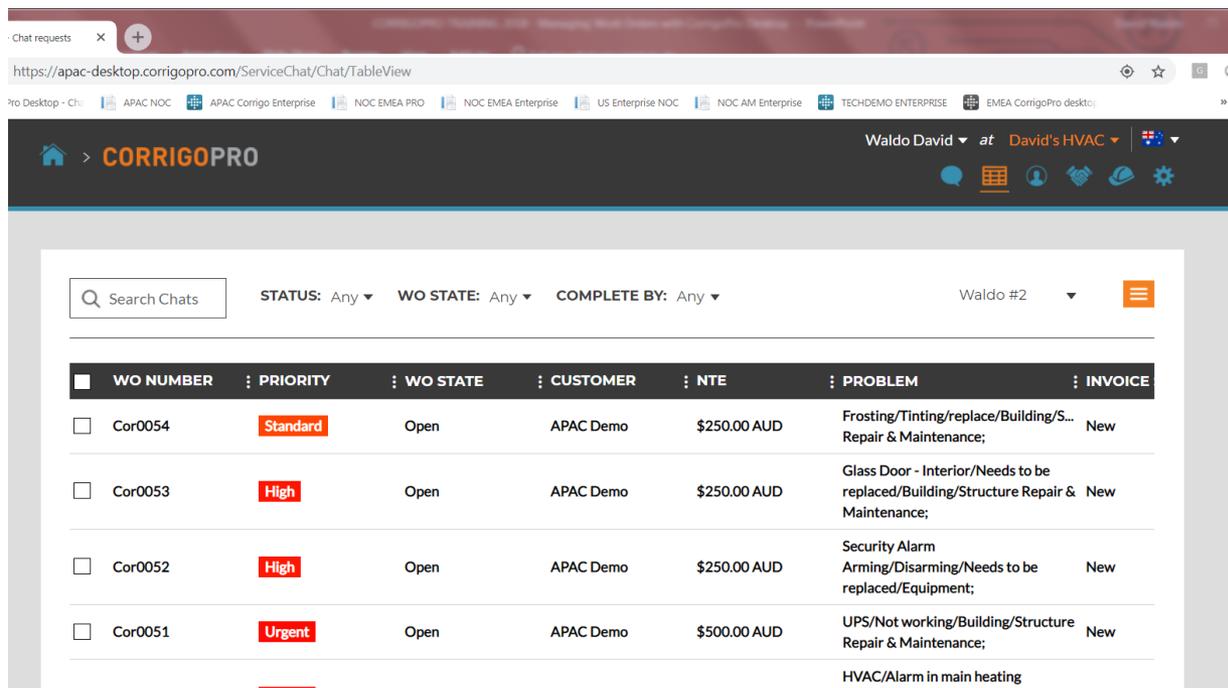


可导出数据表：自我报告



单击数据表图标
打开数据表

数据表可以配置
满足您的数据需求
该表可以保存并与其他用户共享

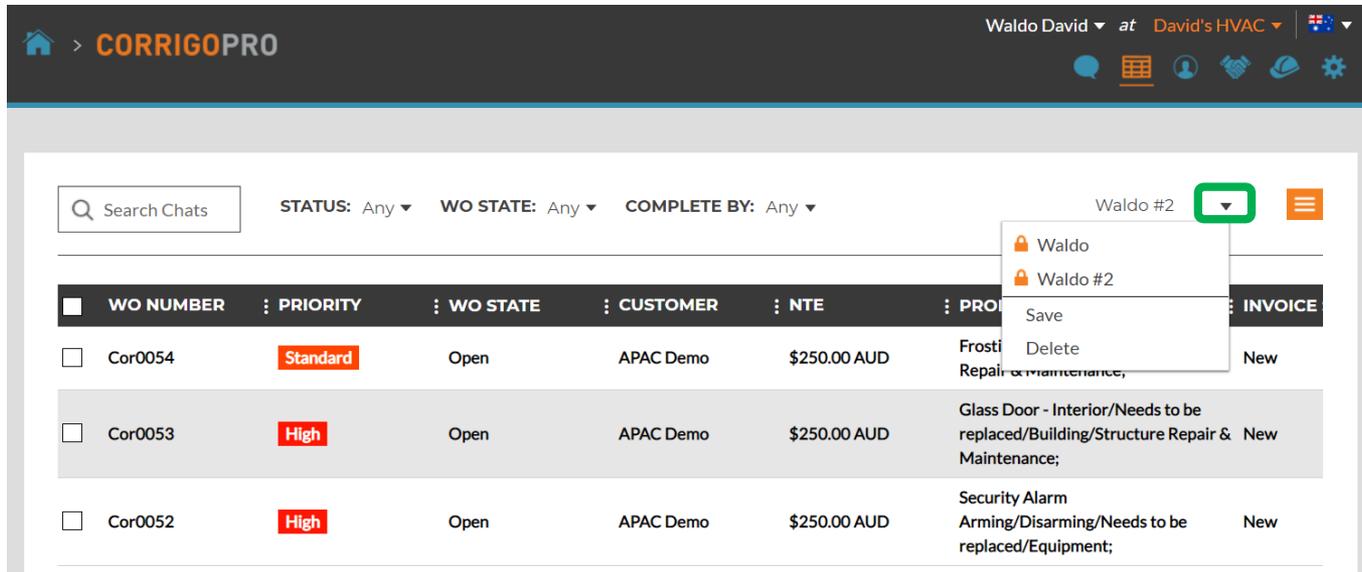


数据表：可选数据类别

The screenshot displays the CORRIGOPRO web interface. At the top, there is a navigation bar with the CORRIGOPRO logo and a user name 'Waldo'. Below the navigation bar, there is a search bar labeled 'Search Chats' and three dropdown menus for 'STATUS: Any', 'WO STATE: Any', and 'COMPLETE BY: Any'. The main content area features a table with the following columns: /OICE DATE, COMPLETED, CHECKED IN, REPAIR CODE, REPAIR CATEG..., and PROS. To the right of the table, a column selection menu is open, listing 31 data categories with checkboxes. The categories include: Priority, Type, WO State, Customer, On Site By, Complete By, Created, Nte, Problem, Is Warranty, Scheduled Start, Pte, Requested By, Service Location, Branch, Invoice Status, Invoice Date, Invoice Number, Invoice Total, and Completed. A green box highlights the 'Columns' option in the menu, which has opened a sub-menu with 'Sort Ascending' and 'Sort Descending' options.

使用桌面底部的滚动条，将滚动到正确的
单击表格右上角的3个点
单击“列”以查看可选数据类别
31种可选数据类别

数据表：保存/共享数据表



Waldo David at David's HVAC

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

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

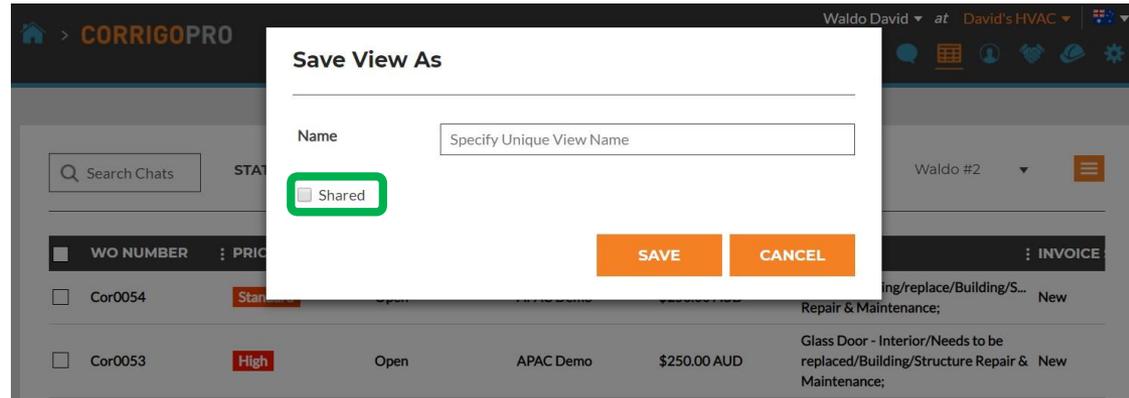
Waldo #2

- Waldo
- Waldo #2

Save

Delete

单击下拉箭头以
保存或检测表
选中“共享”中的支票
如果用户希望与其他用户共
享表



Waldo David at David's HVAC

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

Waldo #2

Save View As

Name Specify Unique View Name

Shared

SAVE CANCEL

WO NUMBER	PRIORITY	WO STATE	CUSTOMER	NTE	PRO	INVOICE
<input type="checkbox"/> Cor0054	Standard	Open	APAC Demo	\$250.00 AUD	Frost Repair & maintenance;	New
<input type="checkbox"/> Cor0053	High	Open	APAC Demo	\$250.00 AUD	Glass Door - Interior/Needs to be replaced/Building/Structure Repair & New Maintenance;	New

设置：通知/高级

The screenshot shows the 'Settings' page in the CORRIGOPRO system. At the top, the user is identified as 'Waldo David' at 'David's HVAC'. The page has two tabs: 'NOTIFICATIONS' (highlighted in green) and 'ADVANCED'. Below the tabs, there is a section for 'POP-UP NOTIFICATIONS' with a toggle switch set to 'OFF'. The 'EMAIL NOTIFICATIONS' section lists various notification types, each with an information icon and a toggle switch. The 'ON' switches are highlighted in green. A 'SAVE' button is located at the bottom right.

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 ⓘ	<input type="checkbox"/> ON
Unread CruChats ⓘ	<input type="checkbox"/> OFF
Quote Approval/Rejection ⓘ	<input type="checkbox"/> ON
WO Recall ⓘ	<input type="checkbox"/> OFF
New PM/RM WOs ⓘ	<input type="checkbox"/> OFF
Negative Score Received ⓘ	<input type="checkbox"/> OFF
Invoice Status Changed ⓘ	<input type="checkbox"/> OFF
Message from a Customer ⓘ	<input type="checkbox"/> OFF
WO is Waiting for Acceptance ⓘ	<input type="checkbox"/> OFF
WO Overdue Warning ⓘ	<input type="checkbox"/> ON
Invoice Overdue Warning ⓘ	<input type="checkbox"/> OFF
On Site By Warning ⓘ	<input type="checkbox"/> OFF

SAVE

点击“设置”图标

查看通知

切换用户通知

使用每个通知右侧的切换开关
关打开或关闭

通知设置为
仅个人用户

设定:进阶

Waldo David at David's HVAC

Settings

NOTIFICATIONS ADVANCED

FINANCIAL

Do not show invoicing info on CruChats *i*

Do not show invoicing info to CruMember users *i*

Do not show NTE to CruMember users *i*

WORK ORDER FLOW

Capture customer signatures *i*

SAVE

点击“设置”图标

点击“高级”

显示财务信息的选项用户可以使用每个选项右侧的切换开关来打开或关闭

切换“捕获客户签名”将启用所有客户帐户的签名捕获功能

单击保存以保存所有更改

问题

在线联系Corrigo :
CorrigoSupport.IFM@ap.jll.com