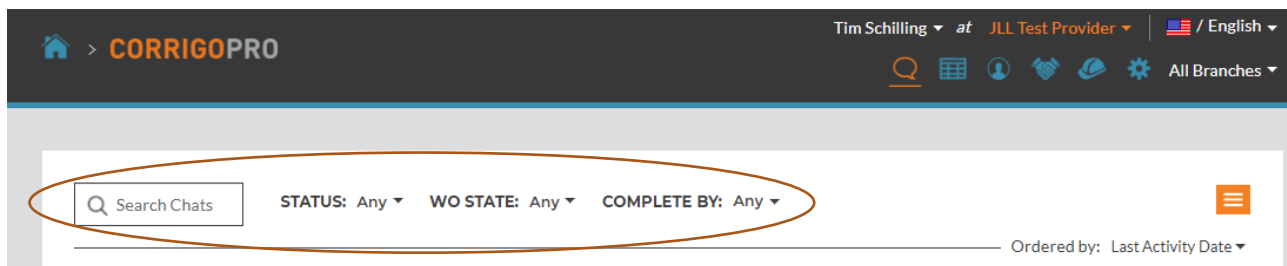


Quick Reference Guide

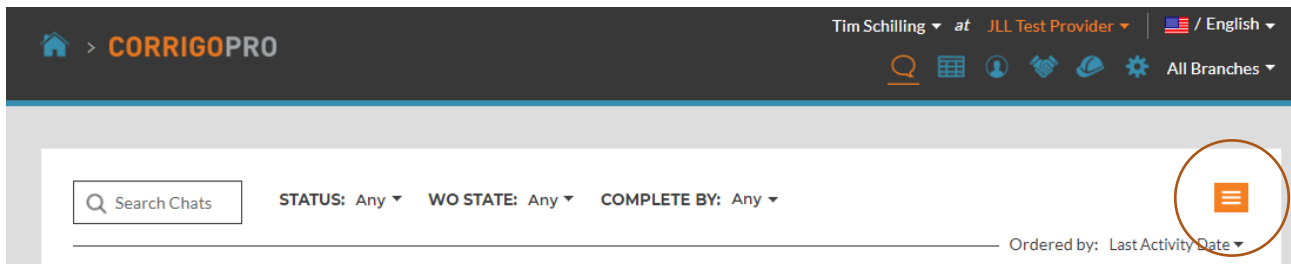
CorrigoPro – CorrigoPro Work Orders Grid (CruChats)

- Click on the CorrigoPro Work Order grid icon to jump into your CruChats
- This is where you as a service provider will manage all your work orders in the back office

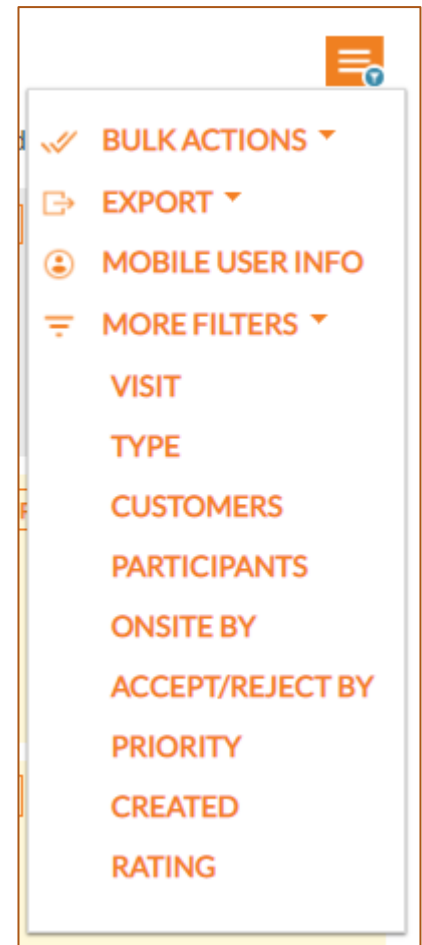
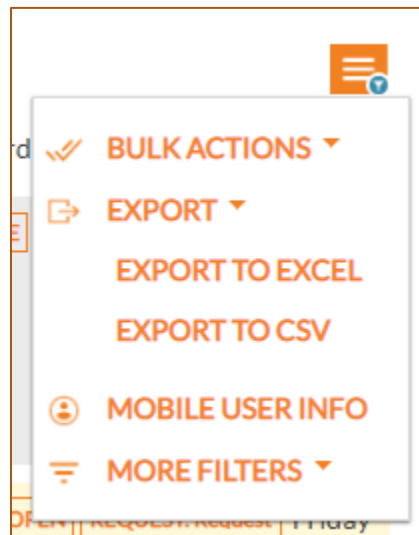
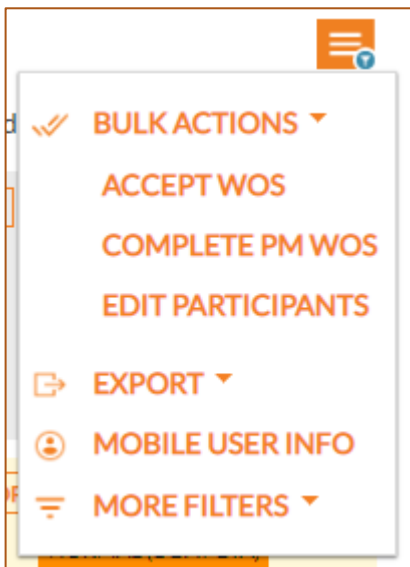


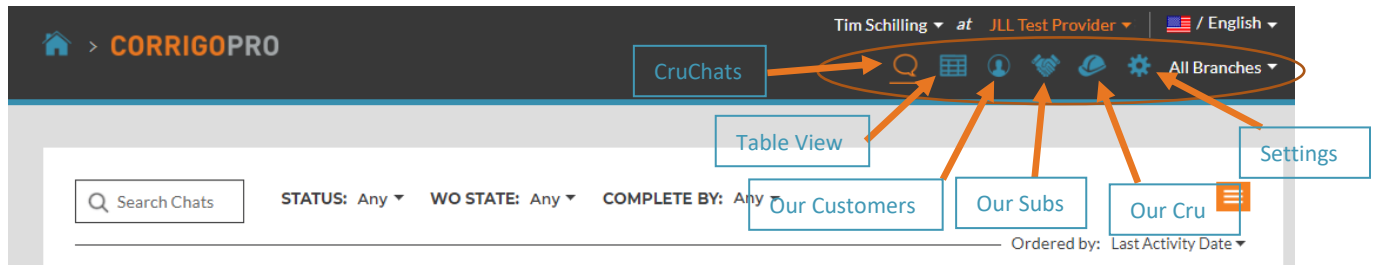
- You can Search for a specific Work Order Number on the search bar
 - If you cannot find a work order, one of the most common reasons is because the filters above. Please check to make sure that they are set to **Any** to find your work order
- You can filter out by Status, Work Order State (WO Status) and Complete By Date
 - Status:
 - Unread
 - Unassigned
 - WOs Overdue
 - WO State:
 - Waiting for Acceptance
 - Open
 - Open: In Progress
 - Open: Paused
 - Completed
 - On Hold
 - Recalled
 - Rejected
 - Require Completion Details
 - Complete By:


- Today
- Tomorrow
- Yesterday
- This Week
- Next Week
- Last Week
- Custom Range

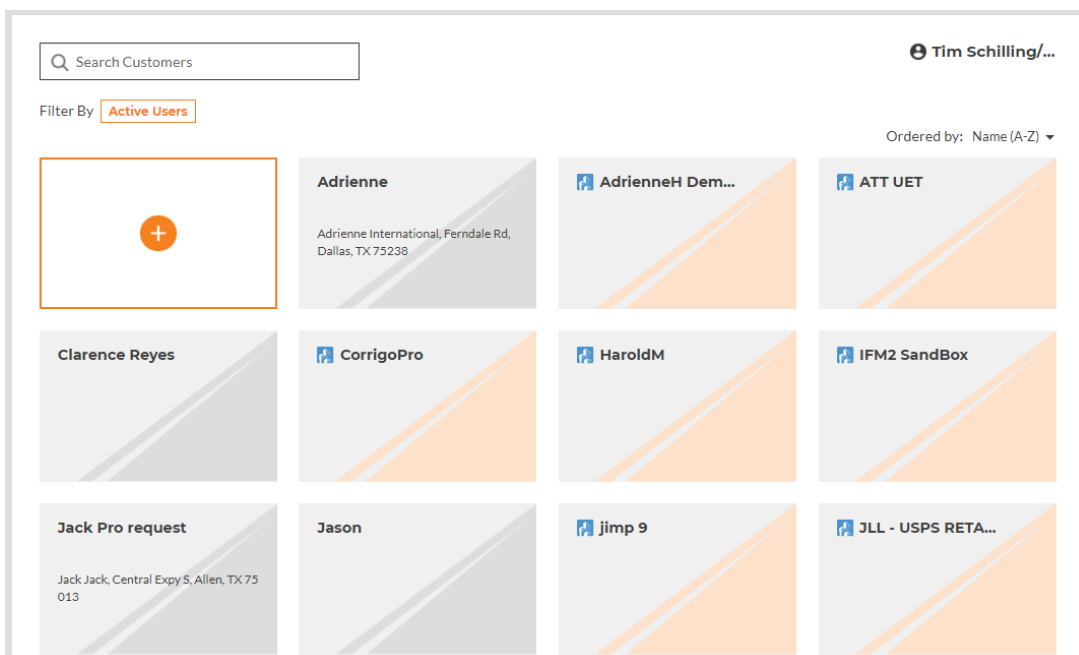


- The Orange icon on the right side allows you to complete some bulk action items, export to excel/CSV, review your mobile user information and select more filters
- Please note, you can only complete PM Work Orders in mass. Request type work orders cannot be completed in mass

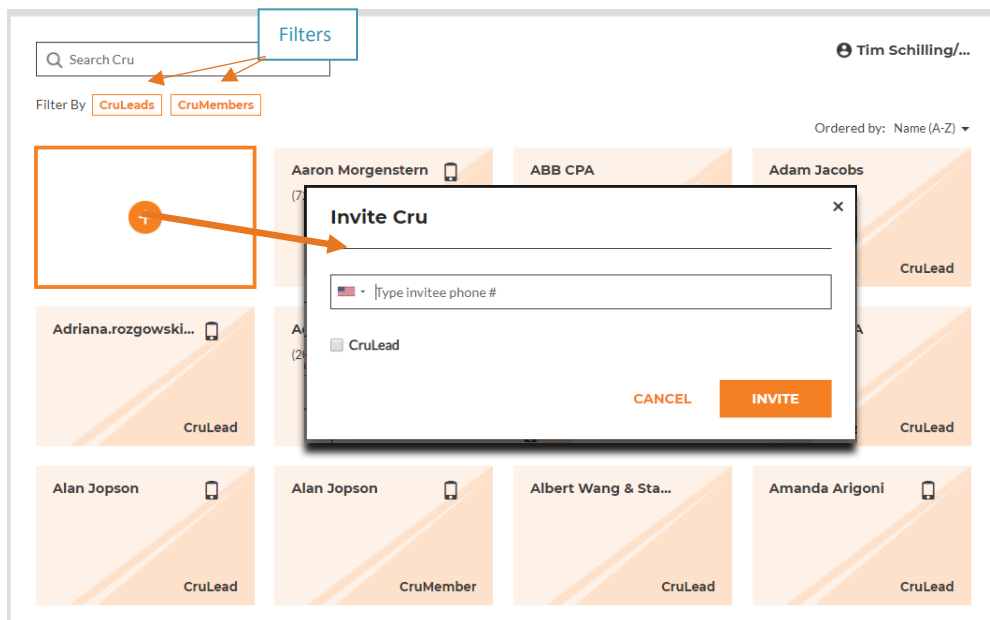




- At the top of this page you have six views that you can jump into (including the default CruChat view covered above)
- Table View is similar to CruChats. You can manage Work Orders on this page with the same filters as CruChats, but provides a more simple view of the Work Orders
- Our Customers provides a view of all the customers your Service Provider services
 - Customers are your customers that invite and connect with you via the CorrigoPro Network as well as those customers that you invite and connect with via the CorrigoPro Request app
 - Connected Customers will only show here AFTER the 1st Work Order is sent. If you need to see a list of all Connected Customers, go to the Scoring Tile
 - You can add a new customer by hitting the  box at the top left of the page



- Our Subs provides the same view the customer view shows, but provides you with a view of all your Subs
 - Subs are Your partner Service Providers that you can connect and communicate with, distribute work orders to and/ or receive work orders from
- Our Cru is similar to the Our Subs and Our Customers view. This view will also allow you to invite members to your Cru and allow you to determine if the new member will be a CruLead or just a CruMember
 - You can also filter by CruLead or CruMember on this page



- Inviting the Cru from this section will require a phone number, as seen above
- Adding from this section will create a mobile only type access, unless a separate user record is also created for them
- A Cru Lead can see all work orders
- A Cru Member can only see work orders that they are added to by a Cru Lead
 - This is one of the most common reasons a user cannot see a work order
- If you want to create a Cru Person without using their phone number, follow these steps:
 - Add the Cru Person as a User (covered under User Management)
 - Login as that user and click on the Robot to add yourself as a Cru Person
 - If you have branches, this will prompt you to choose which branch your Cru Person should be associated with



Quick Name And Phone Number Confirmation

Before we add you to the Cru can we just confirm your name and your cell phone number:

MY CRU NAME
(Your Cru Name will be seen by your customers so pick something appropriate)

MY CELL #
(You will receive a text containing a download link for the CorrigoPro mobile app. Leave the phone number empty if you don't plan to use CorrigoPro mobile app.)

SELECT BRANCHES WHERE YOU WANT TO BE ON THE CRU

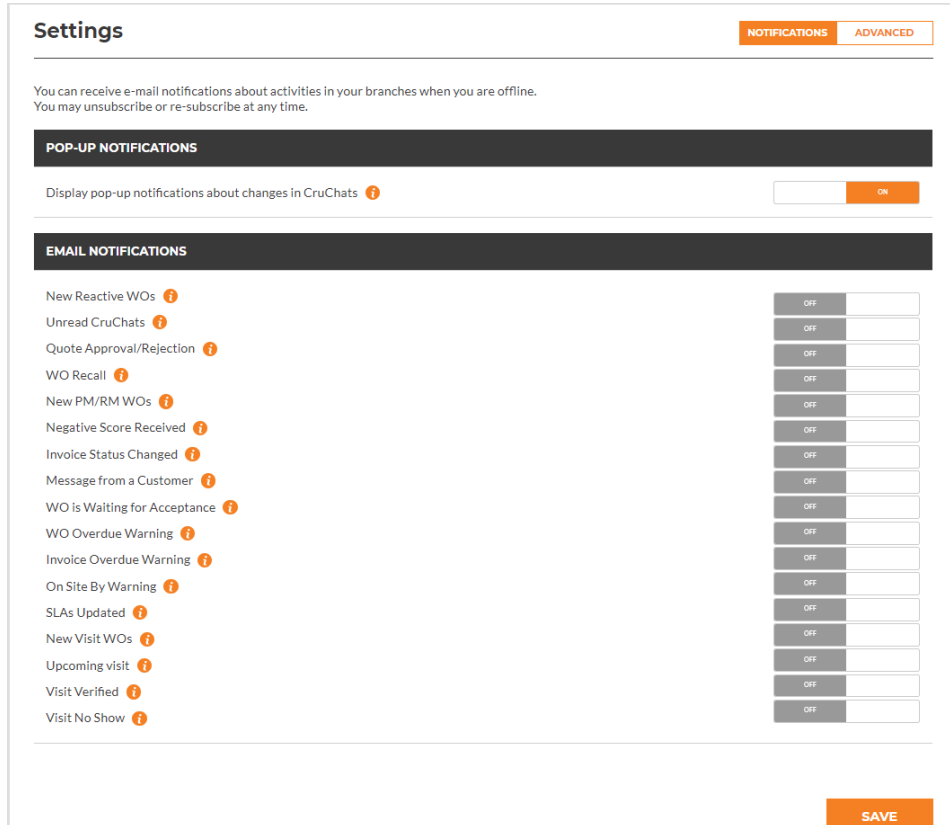
CorrigoPro Support - Dallas	<input type="checkbox"/>
CorrigoPro Support - Panama City	<input checked="" type="checkbox"/>

JOIN THE CRU

- To change the Cru Persons display name, you have to do this using the CorrigoPro mobile app



- Settings has two pages inside it, Notifications and Advanced
 - Notifications allows you to set up Pop-up and Email Notification settings
 - If a notification is toggled on/off, that will also turn that corresponding alert on/off for the user and vice versa (if an alert is toggled on/off, that will turn off/on the corresponding notification)



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

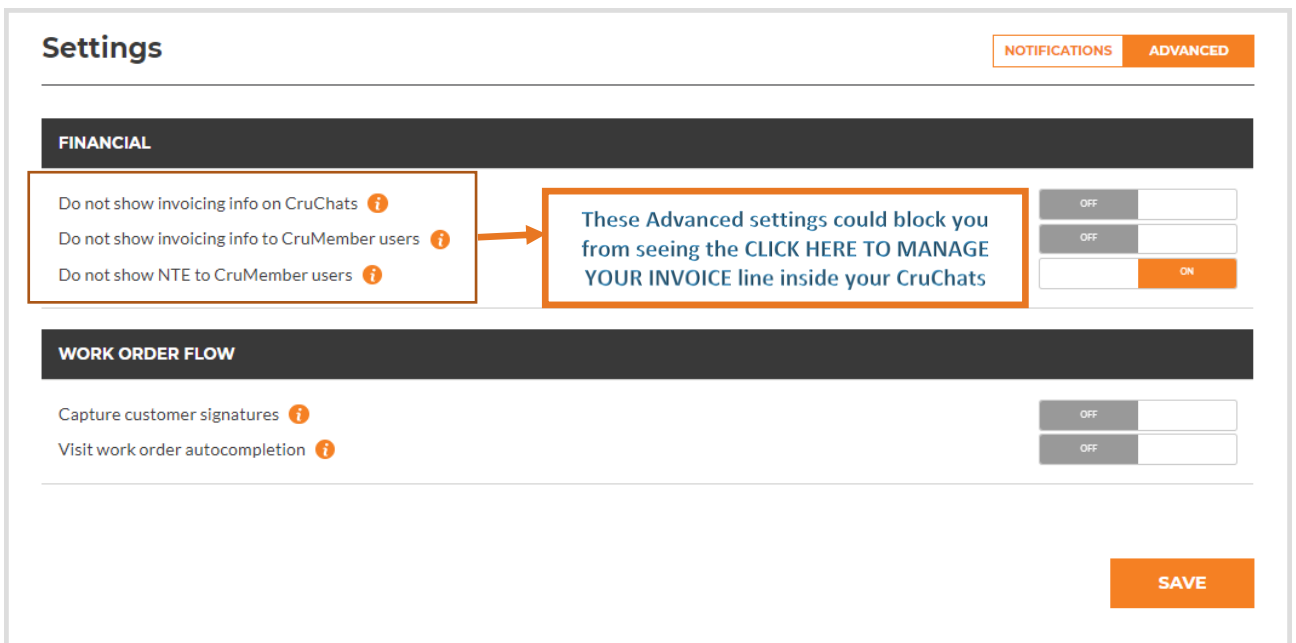
Display pop-up notifications about changes in CruChats i ☐ ON

EMAIL NOTIFICATIONS

New Reactive WOs i	<input type="checkbox"/> OFF
Unread CruChats i	<input type="checkbox"/> OFF
Quote Approval/Rejection i	<input type="checkbox"/> OFF
WO Recall i	<input type="checkbox"/> OFF
New PM/RM WOs i	<input type="checkbox"/> OFF
Negative Score Received i	<input type="checkbox"/> OFF
Invoice Status Changed i	<input type="checkbox"/> OFF
Message from a Customer i	<input type="checkbox"/> OFF
WO is Waiting for Acceptance i	<input type="checkbox"/> OFF
WO Overdue Warning i	<input type="checkbox"/> OFF
Invoice Overdue Warning i	<input type="checkbox"/> OFF
On Site By Warning i	<input type="checkbox"/> OFF
SLAs Updated i	<input type="checkbox"/> OFF
New Visit WOs i	<input type="checkbox"/> OFF
Upcoming visit i	<input type="checkbox"/> OFF
Visit Verified i	<input type="checkbox"/> OFF
Visit No Show i	<input type="checkbox"/> OFF

SAVE

- Advanced Settings allow you to update your Financial and Work Order Flow settings



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

These Advanced settings could block you from seeing the [CLICK HERE TO MANAGE YOUR INVOICE](#) line inside your CruChats

☐ OFF ☐ OFF ☐ ON

WORK ORDER FLOW

Capture customer signatures i ☐ OFF

Visit work order autocompletion i ☐ OFF

SAVE

VERSION CONTROL: *Revision: 1.0 | Tim Schilling | 11/14/19 | First Release*