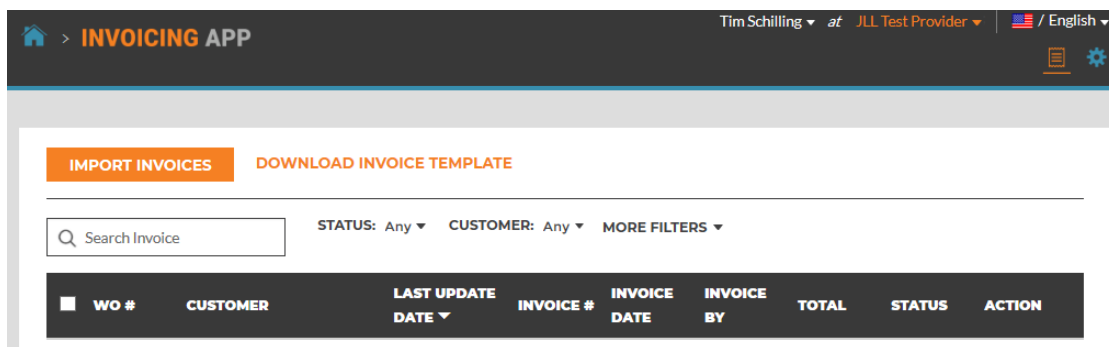



Quick Reference Guide

CorrigoPro – Invoicing App

- After clicking on the Invoice option in a Work Order thru CruChats, or clicking on the Invoicing App on the home page, you will be able to submit invoices using the Invoicing App
- The home page of the invoicing app has a search feature, a few filters and the ability to download invoice templates for bulk invoice uploads. You also can update Zero-Dollar invoice settings on the Invoice App



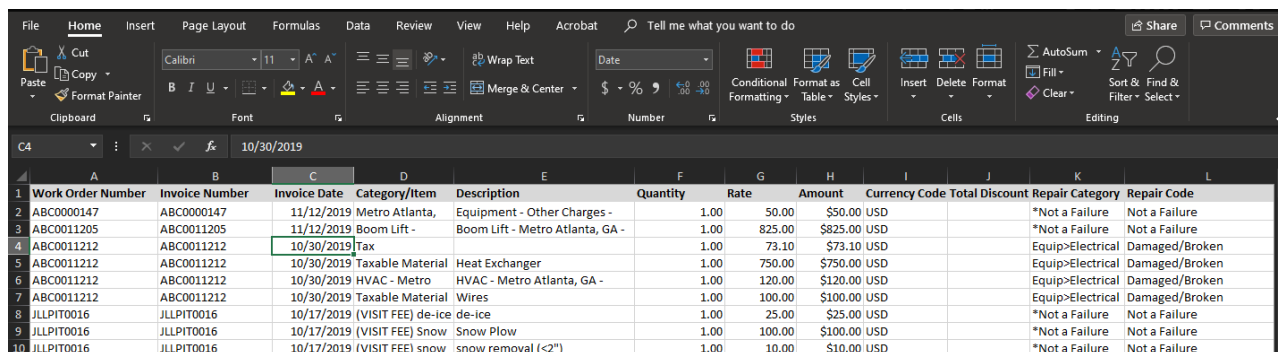
The screenshot shows the 'INVOICING APP' interface. At the top, there's a navigation bar with a home icon, the title 'INVOICING APP', and user information: 'Tim Schilling', 'at JLL Test Provider', and a language selector 'English'. Below the navigation bar, there are two main buttons: 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. A search bar labeled 'Search Invoice' is present, along with filters for 'STATUS: Any', 'CUSTOMER: Any', and 'MORE FILTERS'. Below these, there's a table with columns: 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'INVOICE #', 'INVOICE DATE', 'INVOICE BY', 'TOTAL', 'STATUS', and 'ACTION'.

- Filter by the invoice **Status**, a specific **Customer**, **Branch**, **Invoice Date**, **Last Update Date**, **Type**, **Invoice By**, or **Total**
 - In order to submit an invoice, it must be in completed status, so you may need to check in/out
- All columns with the exception of **Action** can be used to sort invoices – alphabetically or numerically
- Click on the  icon to get to Settings
 - From here you can toggle on or off the ability to Auto-Submit Zero Dollar Invoice



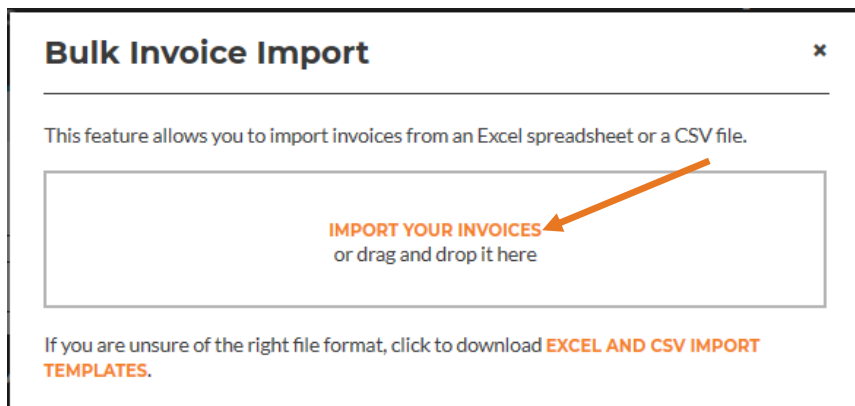
The screenshot shows the 'Settings' page. Under the 'ADVANCED' section, there's a toggle switch for 'Auto-submit invoices with NTE set to 0 (zero)'. The toggle is currently set to 'ON'. A 'SAVE' button is located at the bottom right of the settings area.

- To submit invoices in mass click on **DOWNLOAD INVOICE TEMPLATE** to get a template to help guide you in your import
- After you have reviewed the template you can select multiple WO#'s on the home page of the Invoicing App so that you get the options to **Export**, **Reset**, or **Submit** those invoices in mass
 - If you click **RESET** it will “reset” the invoice, meaning it will erase everything currently on the invoice
- Click Export to bring the current invoices into Excel and fill out the appropriate blank fields to import back in mass



1	Work Order Number	Invoice Number	Invoice Date	Category/Item	Description	Quantity	Rate	Amount	Currency Code	Total Discount	Repair Category	Repair Code
2	ABC0000147	ABC0000147	11/12/2019	Metro Atlanta,	Equipment - Other Charges -	1.00	50.00	\$50.00 USD			*Not a Failure	Not a Failure
3	ABC0011205	ABC0011205	11/12/2019	Boom Lift -	Boom Lift - Metro Atlanta, GA -	1.00	825.00	\$825.00 USD			*Not a Failure	Not a Failure
4	ABC0011212	ABC0011212	10/30/2019	Tax		1.00	73.10	\$73.10 USD			Equip>Electrical	Damaged/Broken
5	ABC0011212	ABC0011212	10/30/2019	Taxable Material	Heat Exchanger	1.00	750.00	\$750.00 USD			Equip>Electrical	Damaged/Broken
6	ABC0011212	ABC0011212	10/30/2019	HVAC - Metro	HVAC - Metro Atlanta, GA -	1.00	120.00	\$120.00 USD			Equip>Electrical	Damaged/Broken
7	ABC0011212	ABC0011212	10/30/2019	Taxable Material	Wires	1.00	100.00	\$100.00 USD			Equip>Electrical	Damaged/Broken
8	JLLPIT0016	JLLPIT0016	10/17/2019	(VISIT FEE) de-ice	de-ice	1.00	25.00	\$25.00 USD			*Not a Failure	Not a Failure
9	JLLPIT0016	JLLPIT0016	10/17/2019	(VISIT FEE) Snow	Snow Plow	1.00	100.00	\$100.00 USD			*Not a Failure	Not a Failure
10	JLLPIT0016	JLLPIT0016	10/17/2019	(VISIT FEE) snow	snow removal (<2")	1.00	10.00	\$10.00 USD			*Not a Failure	Not a Failure

- To import invoices in mass, after you edit and save the file as seen above, click the **IMPORT INVOICES** button at the top of the home page on the Invoicing App
- Upload the saved invoices document on the pop up



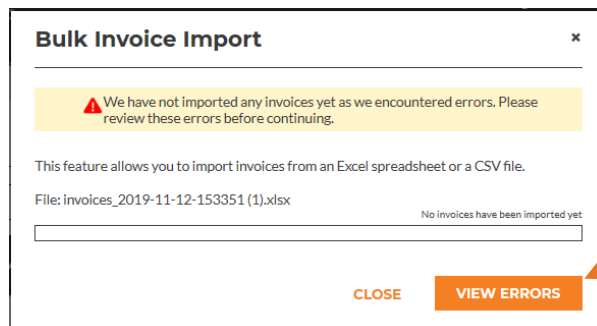
Bulk Invoice Import

This feature allows you to import invoices from an Excel spreadsheet or a CSV file.

IMPORT YOUR INVOICES
or drag and drop it here

If you are unsure of the right file format, click to download **EXCEL AND CSV IMPORT TEMPLATES**.

- If you have any errors on your import, you will receive the following error screen, click on **VIEW ERRORS** to identify what the issues are for this import



Bulk Invoice Import

⚠ We have not imported any invoices yet as we encountered errors. Please review these errors before continuing.

This feature allows you to import invoices from an Excel spreadsheet or a CSV file.

File: Invoices_2019-11-12-153351 (1).xlsx

No invoices have been imported yet

CLOSE **VIEW ERRORS**

- The Bulk Invoice Import Errors page will tell you exactly what is wrong with each individual row in your import, and let you know how many Invoices on the sheet can still be imported if you choose to continue

Bulk Invoice Import Errors

If you continue, we will only be able to import 1 out of 4 invoices from **invoices_2019-11-12-153351 (1).xlsx**. The list of invoices that we will not be able to import is below

WO #	INVOICE #	INVOICE DATE	ITEM	DESCRIPTION	QTY	RATE	AMOUNT	DISCOUNT	REPAIR CATEGORY	REPAIR CODE	COMMENT	ERROR
2	ABC0000147	ABC0000147	11/11/2019	Boom Lift - Metro Atlanta, GA - Equipment - Other Charges - Tax Exempt	Boom Lift - Metro ...	1	50	50	*Not a Failure	Not a Failure	completed	A price list item rate is incorrect, your rate is: 825.00.
4	ABC0011212	ABC0011212	10/29/2019	Tax		1	73.1	73.1	Equip>Electrical	Damaged/Broken	I replace the heat exchanger and wiring test of the unit it is up and running	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
5	ABC0011212	ABC0011212	10/29/2019	Taxable Material	Heat Exchanger	1	750	750	Equip>Electrical	Damaged/Broken	I replace the heat exchanger and wiring test of the unit it is up and running	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
6	ABC0011212	ABC0011212	10/29/2019	HVAC - Metro Atlanta, GA - Labor - Reg. Rate - Tax Exempt	HVAC - Metro Atl...	1	120	120	Equip>Electrical	Damaged/Broken	I replace the heat exchanger and wiring test of the unit it is up and running	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
7	ABC0011212	ABC0011212	10/29/2019	Taxable Material	Wires	1	100	100	Equip>Electrical	Damaged/Broken	I replace the heat exchanger and wiring test of the unit it is up and running	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
8	JLLPIT0016	JLLPIT0016	10/16/2019	(VISIT FEE) de-ice	de-ice	1	25	25	*Not a Failure	Not a Failure	snow removal	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
9	JLLPIT0016	JLLPIT0016	10/16/2019	(VISIT FEE) Snow Plow	Snow Plow	1	100	100	*Not a Failure	Not a Failure	snow removal	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
10	JLLPIT0016	JLLPIT0016	10/16/2019	(VISIT FEE) snow removal (<2")	snow removal (<2")	1	10	10	*Not a Failure	Not a Failure	snow removal	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.

EXPORT
CANCEL THE ENTIRE IMPORT
IMPORT 1 OUT OF 4 INVOICES

- You can continue the import and import all invoices that are correct or cancel the entire import to edit the sheet and fix your errors to re-upload
- You can also **EXPORT** this sheet to have an excel file showing all your errors to help you fix all errors after you navigate away from this page

- To Invoice a work order individually you can click on the Invoice here option on the Work Order in CruChats or click on the **CREATE** option under the **Actions** column in the Invoicing App to find your invoice

IMPORT INVOICES

DOWNLOAD INVOICE TEMPLATE

Q Search Invoice

STATUS: Any CUSTOMER: JLL User Training MORE FILTERS

	WO #	CUSTOMER	LAST UPDATE DATE	INVOICE #	INVOICE DATE	INVOICE BY	TOTAL	STATUS	ACTION
<input type="checkbox"/>	ABC001120 5	JLL User Training	11/12/2019	ABC001120 5	11/12/2019	11/22/2019	\$825.00 U...	Draft	EDIT
<input type="checkbox"/>	ABC000014 7	JLL User Training	11/12/2019			12/4/2019	\$50.00 USD	Draft	EDIT
<input type="checkbox"/>	ABC001121 7	JLL User Training	11/12/2019			12/4/2019		New	CREATE
<input type="checkbox"/>	ABC001121 2	JLL User Training	10/31/2019	ABC001121 2	10/31/2019		\$1,043.10 ...	Authorized	VIEW
<input type="checkbox"/>	JLLPIT0016	JLL User Training	10/18/2019	JLLPIT0016	10/18/2019		\$135.00 U...	Submitted	VIEW

Invoices per page: 5

Showing Invoices 1 to 5 of 74

<<

<

1

2

3

4

5

>

>>

You have until 12/4/2019 2:00 AM to submit the invoice. Click [HERE](#) to manage your invoice

All

Type your message or drag and drop files

SEND

- You will see the next pop up to fill out your invoice for submission

Invoice for Work Order #ABC0011217

CUSTOMER JLL User Training

LAST UPDATE DATE 11/12/2019

NTE \$1,250.00 USD

TIME ON SITE -- VIEW

INVOICE BY 12/4/2019 2:00 AM

INVOICE DATE

INVOICE #

USE WO#

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Please select		1.00	\$0.0000	\$0.00

DISCOUNT None

TAX \$0.00 USD

TOTAL \$0.00 USD

WORK ORDER COMPLETION DETAILS

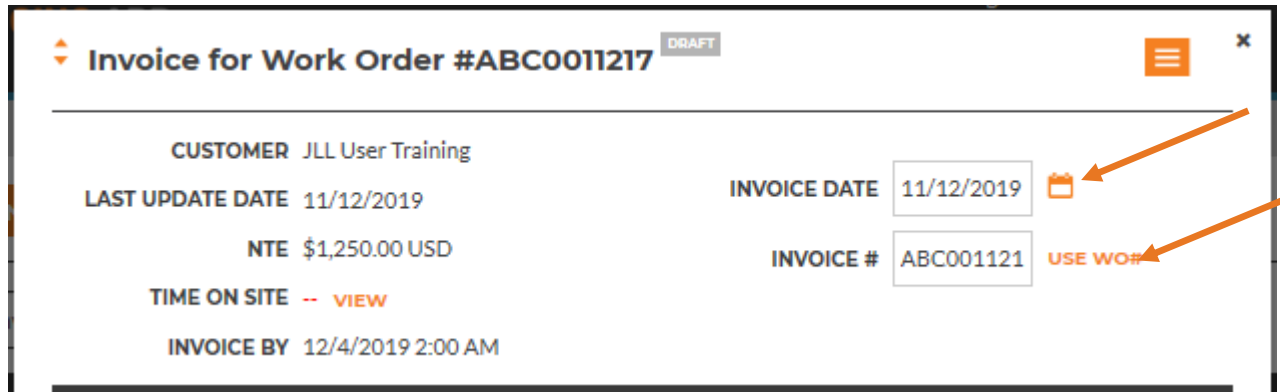
ATTACHMENTS

ACTION HISTORY

RESET

SUBMIT

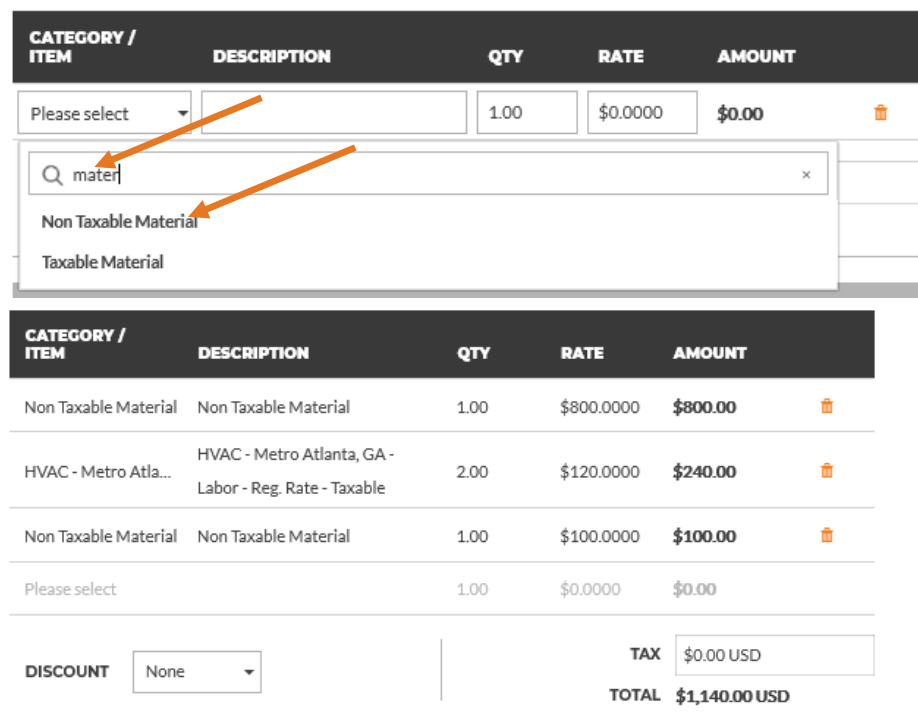
- Fill out the Invoice Date and Invoice Number. Invoice date will typically be the current date and the Invoice Number will vary depending on client, but using the WO# is the best practice to avoid duplicates and ensure a stable nomenclature per client
- You can click on the Calendar icon to fill out the date, it will default to the current date
- You can click on **USE WO#** to auto fill the invoice number field



- To add invoice line items, click on the area that says **Please select** to pull up your rate card that is pre-loaded in the instance

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Please select		1.00	\$0.0000	\$0.00

- Fill out all invoice items by typing in and clicking on what you need to add, filling out the quantity and rate (if applicable)




CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Please select		1.00	\$0.0000	\$0.00
Non Taxable Material	Non Taxable Material	1.00	\$800.0000	\$800.00
HVAC - Metro Atlanta, GA - Labor - Reg. Rate - Taxable		2.00	\$120.0000	\$240.00
Non Taxable Material	Non Taxable Material	1.00	\$100.0000	\$100.00
Please select		1.00	\$0.0000	\$0.00

DISCOUNT None **TAX** \$0.00 USD
TOTAL \$1,140.00 USD

- Click on the **TAX VALIDATION FAILURE** error notification to view what the error is

Tax Verification Details for Invoice #ABC0011217

 Please review the tax amounts and update as appropriate.


CATEGORY / ITEM	DESCRIPTION	SUBTOTAL	VERIFIED TAX RATE	VERIFIED TAX SUBTOTAL
Parts & Materials	Non Taxable Material	\$800.00 USD	0.00%	\$0.00 USD
Labor	HVAC - Metro Atlanta, GA - Labor - Reg. Rate - Taxable	\$240.00 USD	8.60%	\$20.64 USD
Parts & Materials	Non Taxable Material	\$100.00 USD	0.00%	\$0.00 USD

VERIFIED TAX TOTAL: \$20.64 USD
SUBMITTED TAX TOTAL: \$16.80 USD

CLOSE

- After viewing the error, close this page out and enter in the Verified Tax Total in the line item where the incorrect tax total was located and re-submit

Invoice for Work Order #ABC0011217
DRAFT

 Tax validation failure

CUSTOMER JLL User Training
 LAST UPDATE DATE 11/12/2019
 NTE \$1,250.00 USD
 TIME ON SITE -- VIEW
 INVOICE BY 12/4/2019 2:00 AM

INVOICE DATE 11/12/2019
 INVOICE # ABC001121 USE WO#

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Non Taxable Material	Non Taxable Material	1.00	\$800.0000	\$800.00
HVAC - Metro Atlanta	HVAC - Metro Atlanta, GA - Labor - Reg. Rate - Taxable	2.00	\$120.0000	\$240.00
Non Taxable Material	Non Taxable Material	1.00	\$100.0000	\$100.00
Please select		1.00	\$0.0000	\$0.00

DISCOUNT None

TAX \$20.64 USD
 TOTAL \$1,160.64 USD

WORK ORDER COMPLETION DETAILS

RESET SUBMIT

- Your invoice has been successfully submitted!

Invoice for Work Order #ABC0011217
SUBMITTED

CUSTOMER JLL User Training
 LAST UPDATE DATE 11/12/2019
 NTE \$1,250.00 USD
 TIME ON SITE -- VIEW

INVOICE DATE 11/12/2019
 INVOICE # ABC001121

- Please Note: once an Invoice is submitted, you cannot edit the invoice. You will need to contact the customer who can dispute the invoice in the back office, this will allow you to submit an updated invoice.

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