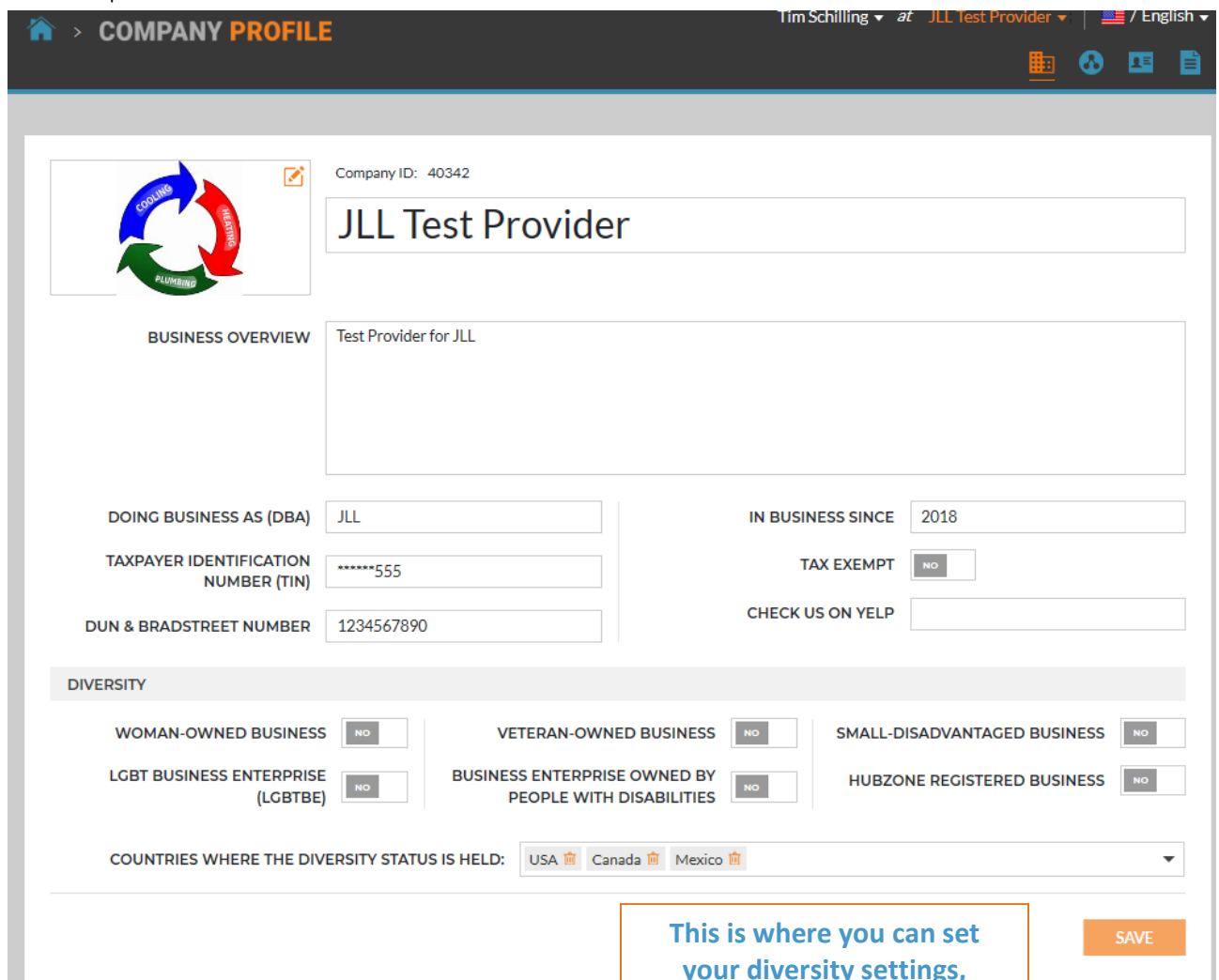


# Quick Reference Guide


## CorrigoPro – Managing Company Information

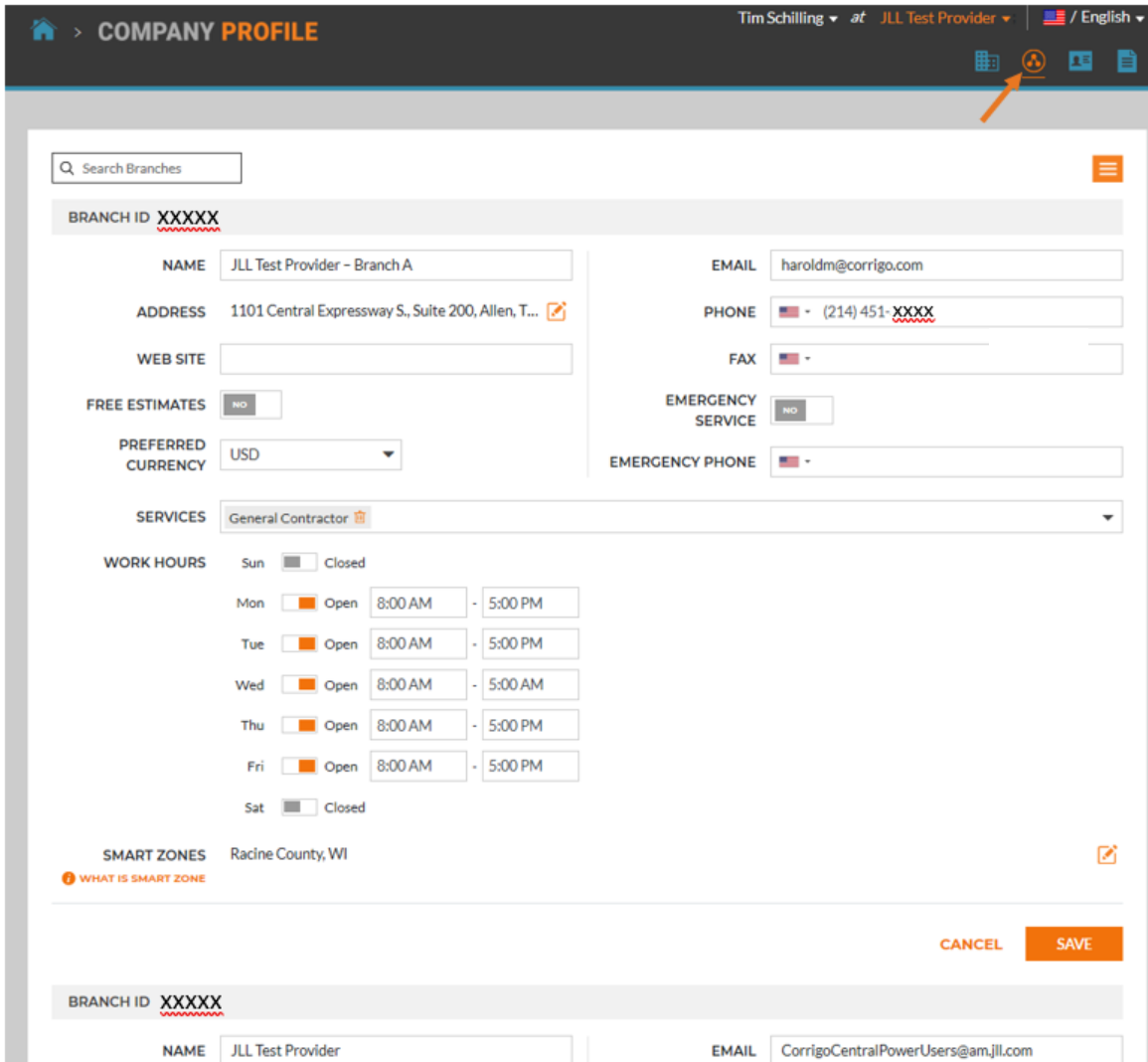
- Click on the **COMPLETE YOUR COMPANY PROFILE** to manage your company information
  - Please note, that even though your company profile may not be at 100%, you will still be able to receive work orders and be visible to customers
  - When you get into your Company Profile home page, you will be able to see an overview of your company. This is where you will make any changes necessary to keep your Company Profile up to date



The screenshot shows the 'COMPANY PROFILE' page for a user named Tim Schilling at JLL Test Provider. The page includes a navigation bar with a home icon, the title 'COMPANY PROFILE', and user information. Below the navigation bar is a main content area with a circular logo for 'COOLING', 'PLUMBING', and 'ELECTRICAL' services. The company name 'JLL Test Provider' and ID '40342' are displayed. A 'BUSINESS OVERVIEW' section contains the text 'Test Provider for JLL'. Below this are several input fields for business details: 'DOING BUSINESS AS (DBA)' (JLL), 'TAXPAYER IDENTIFICATION NUMBER (TIN)' (\*\*\*\*\*555), 'DUN & BRADSTREET NUMBER' (1234567890), 'IN BUSINESS SINCE' (2018), 'TAX EXEMPT' (NO), and 'CHECK US ON YELP'. A 'DIVERSITY' section contains checkboxes for 'WOMAN-OWNED BUSINESS', 'LGBT BUSINESS ENTERPRISE (LGBTBE)', 'VETERAN-OWNED BUSINESS', 'BUSINESS ENTERPRISE OWNED BY PEOPLE WITH DISABILITIES', 'SMALL-DISADVANTAGED BUSINESS', and 'HUBZONE REGISTERED BUSINESS', all set to 'NO'. A dropdown menu for 'COUNTRIES WHERE THE DIVERSITY STATUS IS HELD:' shows 'USA', 'Canada', and 'Mexico'. A 'SAVE' button is located at the bottom right.

**This is where you can set your diversity settings, Business overview, Tax ID number, Tax Exemption status and historical information**

- To get add or edit your company Branches, click on the  icon at the top right of your screen while on the Company Profile page
- Note: The BRANCH name is how you are listed within the CorrigoPro Network



The screenshot shows the 'COMPANY PROFILE' page for a user named Tim Schilling. The page is for a branch named 'JLL Test Provider - Branch A'. The form includes the following fields and options:

- BRANCH ID:** XXXXX
- NAME:** JLL Test Provider - Branch A
- EMAIL:** haroldm@corrigo.com
- ADDRESS:** 1101 Central Expressway S., Suite 200, Allen, T...
- PHONE:** (214) 451-XXXX
- WEB SITE:** (empty)
- FAX:** (empty)
- FREE ESTIMATES:** NO
- EMERGENCY SERVICE:** NO
- PREFERRED CURRENCY:** USD
- EMERGENCY PHONE:** (empty)
- SERVICES:** General Contractor
- WORK HOURS:**
  - Sun: Closed
  - Mon: Open 8:00 AM - 5:00 PM
  - Tue: Open 8:00 AM - 5:00 PM
  - Wed: Open 8:00 AM - 5:00 AM
  - Thu: Open 8:00 AM - 5:00 PM
  - Fri: Open 8:00 AM - 5:00 PM
  - Sat: Closed
- SMART ZONES:** Racine County, WI

At the bottom of the form, there are 'CANCEL' and 'SAVE' buttons. Below the form, the main company profile is visible with 'BRANCH ID XXXXX', 'NAME JLL Test Provider', and 'EMAIL CorrigoCentralPowerUsers@am.jll.com'.

- This is where you can determine services per branch, set work hours as well as contact information and Smart Zones
  - If you do not have the option to add a branch contact the Connection Team
    - (800) 517-2629 (x1) or [Connect@Corrigo.com](mailto:Connect@Corrigo.com)
  - You will need to set your select your services that you provide, as this will come into play with Work Order assignments in Enterprise
  - Please also note that the first Smart Zone is free, any additional Smart Zones are \$2.50 per zone per month

Not all information will transfer over to the customers view, please see below comparisons:


The image shows two side-by-side screenshots comparing the provider's view of a company profile with the customer's view.

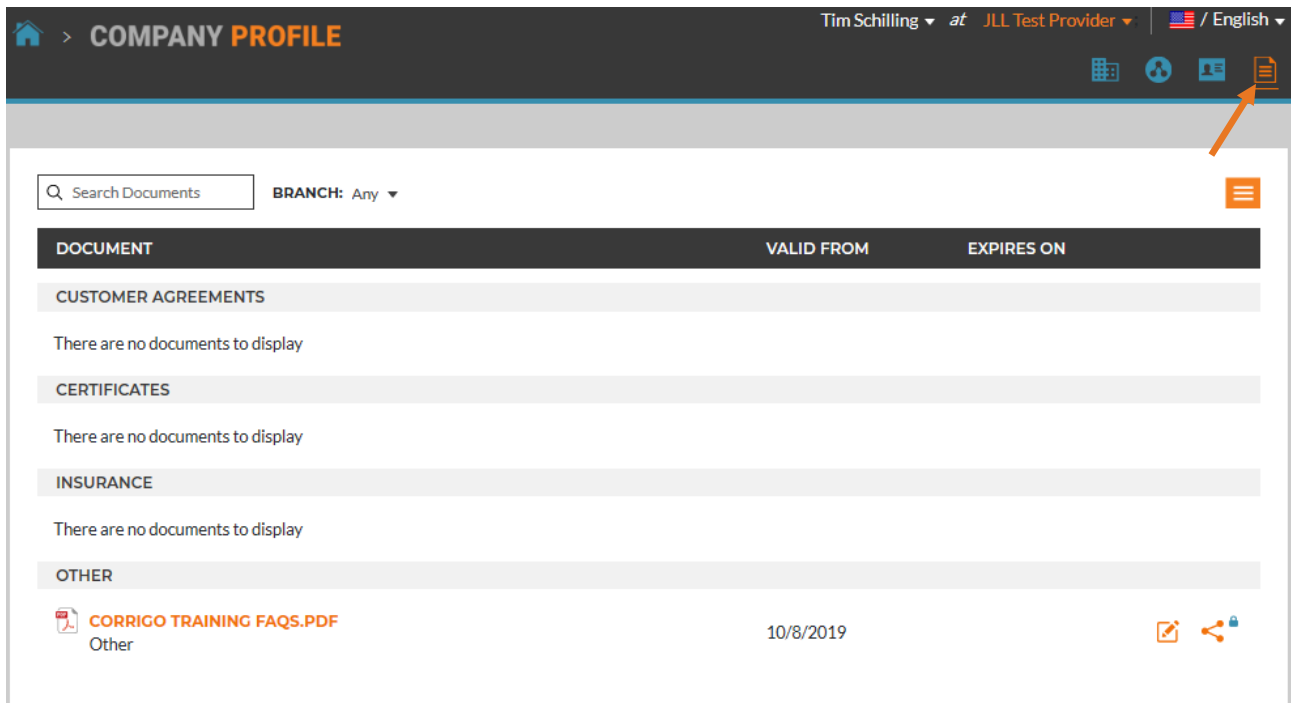
**Provider View (Left):** Shows a form for 'CorrigoPro Support - Dallas' with fields for Name, Address, Email, Phone, Fax, Website, and Services. A red box highlights the 'Branch Section in Company Profile on Provider Side'.

**Customer View (Right):** Shows the 'SERVICE PRO | CORRIGOPRO SUPPORT (TX)' page. It displays contact information like phone (+1 469-766-2262) and email (test@testemail.com). A red box highlights the 'Provider Record on Requestor's Side'.




- To add and edit contacts click on the icon at the top right of the Company Profile page

The screenshot shows the 'COMPANY PROFILE' page. At the top right, there is a navigation bar with a user icon (a person silhouette) highlighted by a red arrow. Below the navigation bar, there is a search bar for contacts and a list of contact details for 'Ms. Ann Jacobs'.

- To add/edit all documents attached to your profile click on the  icon at the top right of the Company Profile page



The screenshot shows the 'COMPANY PROFILE' page in the Corrigo system. The user is logged in as 'Tim Schilling' at 'JLL Test Provider' in 'English'. The page features a search bar for documents and a 'BRANCH: Any' dropdown. Below these are sections for 'CUSTOMER AGREEMENTS', 'CERTIFICATES', 'INSURANCE', and 'OTHER'. The 'OTHER' section contains one document: 'CORRIGO TRAINING FAQS.PDF' with a validity date of '10/8/2019'. An orange arrow points to a document icon in the top right navigation bar.

DOCUMENT	VALID FROM	EXPIRES ON
CUSTOMER AGREEMENTS		
There are no documents to display		
CERTIFICATES		
There are no documents to display		
INSURANCE		
There are no documents to display		
OTHER		
 CORRIGO TRAINING FAQS.PDF Other	10/8/2019	 

- To add a new document, click on the  to bring up the option to add new documents

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