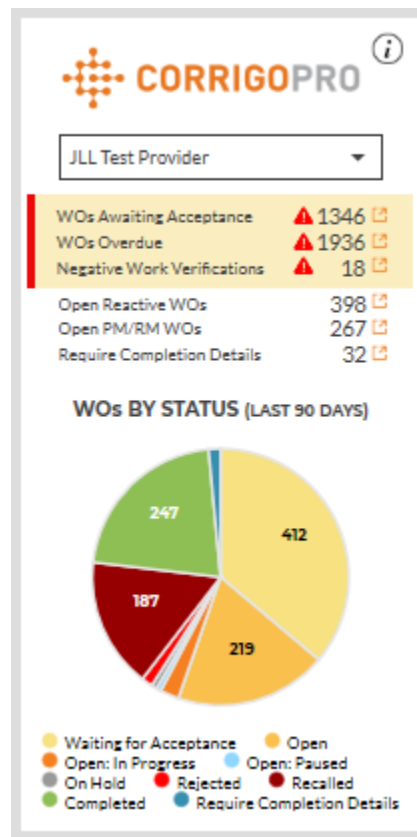


Quick Reference Guide

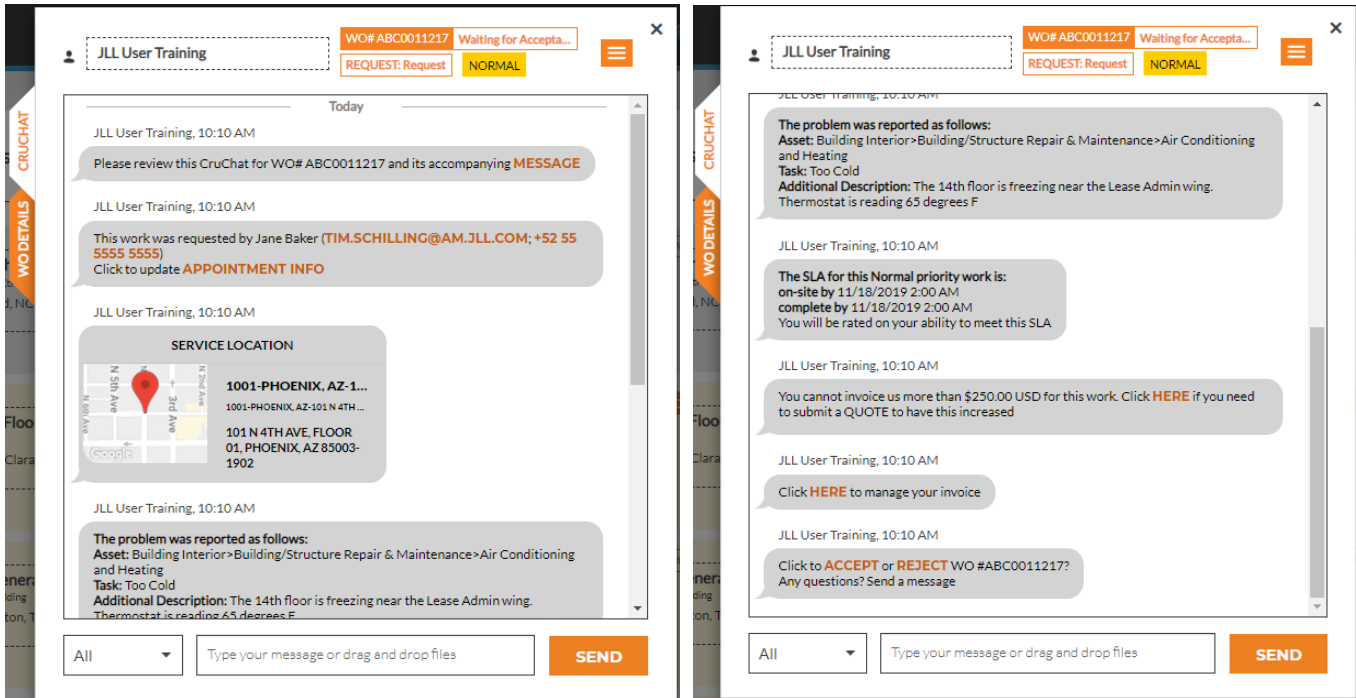
CorrigoPro – Managing a Work Order in Corrigo Pro-Desktop

- Log into Corrigo Pro and click on the Grid, or App, that looks like the one below



- This App will bring you into your CruChats/Work Orders

- On the CruChats or Table View, click on a Work Order to bring the Pop-Up view of your Work Order



WO# ABC0011217 Waiting for Acceptance

REQUEST: Request NORMAL

JLL User Training, 10:10 AM

Please review this CruChat for WO# ABC0011217 and its accompanying MESSAGE

JLL User Training, 10:10 AM

This work was requested by Jane Baker (TIM.SCHILLING@AM.JLL.COM; +52 55 5555 5555)
Click to update **APPOINTMENT INFO**

JLL User Training, 10:10 AM

SERVICE LOCATION

1001-PHOENIX, AZ-1...
1001-PHOENIX, AZ-101 N 4TH...
101 N 4TH AVE, FLOOR 01, PHOENIX, AZ 85003-1902

JLL User Training, 10:10 AM

The problem was reported as follows:
Asset: Building Interior>Building/Structure Repair & Maintenance>Air Conditioning and Heating
Task: Too Cold
Additional Description: The 14th floor is freezing near the Lease Admin wing. Thermostat is reading 65 degrees F

JLL User Training, 10:10 AM

The SLA for this Normal priority work is:
on-site by 11/18/2019 2:00 AM
complete by 11/18/2019 2:00 AM
You will be rated on your ability to meet this SLA

JLL User Training, 10:10 AM

You cannot invoice us more than \$250.00 USD for this work. Click **HERE** if you need to submit a QUOTE to have this increased

JLL User Training, 10:10 AM

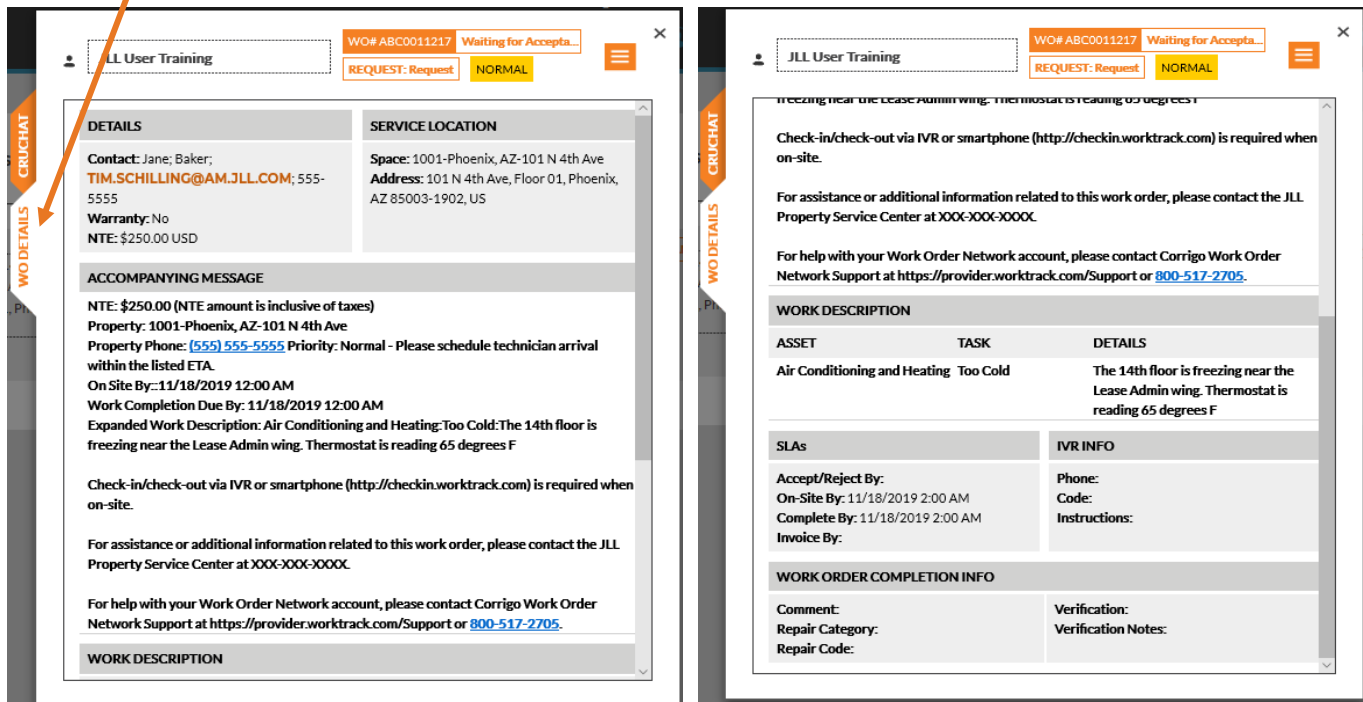
Click **HERE** to manage your invoice

JLL User Training, 10:10 AM

Click to **ACCEPT** or **REJECT** WO #ABC0011217?
Any questions? Send a message

All Type your message or drag and drop files **SEND**

- Click on the WO Details tab at the way left to view the full WO Details in a quick view page



WO# ABC0011217 Waiting for Acceptance

REQUEST: Request NORMAL

DETAILS

Contact: Jane; Baker;
TIM.SCHILLING@AM.JLL.COM; 555-5555
Warranty: No
NTE: \$250.00 USD

SERVICE LOCATION

Space: 1001-Phoenix, AZ-101 N 4th Ave
Address: 101 N 4th Ave, Floor 01, Phoenix, AZ 85003-1902, US

ACCOMPANYING MESSAGE

NTE: \$250.00 (NTE amount is inclusive of taxes)
Property: 1001-Phoenix, AZ-101 N 4th Ave
Property Phone: [555] 555-5555 Priority: Normal - Please schedule technician arrival within the listed ETA.
On Site By: 11/18/2019 12:00 AM
Work Completion Due By: 11/18/2019 12:00 AM
Expanded Work Description: Air Conditioning and Heating: Too Cold: The 14th floor is freezing near the Lease Admin wing. Thermostat is reading 65 degrees F

Check-in/check-out via IVR or smartphone (<http://checkin.worktrack.com>) is required when on-site.

For assistance or additional information related to this work order, please contact the JLL Property Service Center at XXX-XXX-XXXX.

For help with your Work Order Network account, please contact Corrigo Work Order Network Support at <https://provider.worktrack.com/Support> or 800-517-2705.

WORK DESCRIPTION

ASSET TASK DETAILS
Air Conditioning and Heating Too Cold The 14th floor is freezing near the Lease Admin wing. Thermostat is reading 65 degrees F

SLAs

Accept/Reject By:
On-Site By: 11/18/2019 2:00 AM
Complete By: 11/18/2019 2:00 AM
Invoice By:


IVR INFO

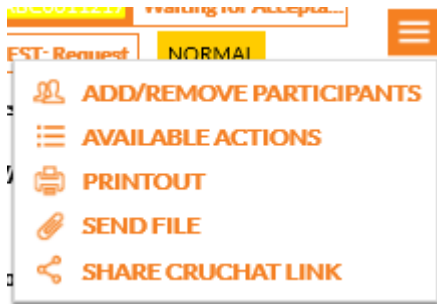
Phone:
Code:
Instructions:

WORK ORDER COMPLETION INFO

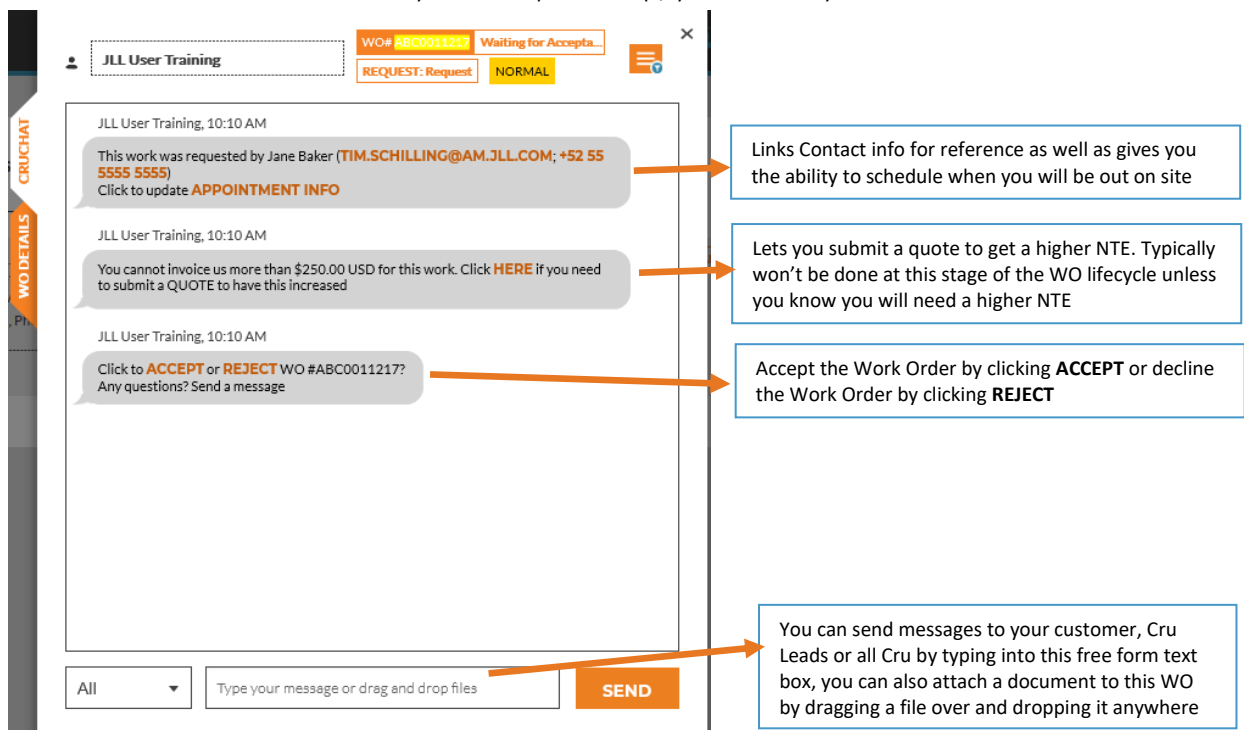
Comment:
Repair Category:
Repair Code:

Verification:
Verification Notes:

- Click on the  icon to bring up more available actions



- From here, if you select **Available Actions** it will bring you back into the CruChat tab, and only list out what the available actions are for the current state of the work order
- For a new Work Order that has yet to be picked up, you can only view the below



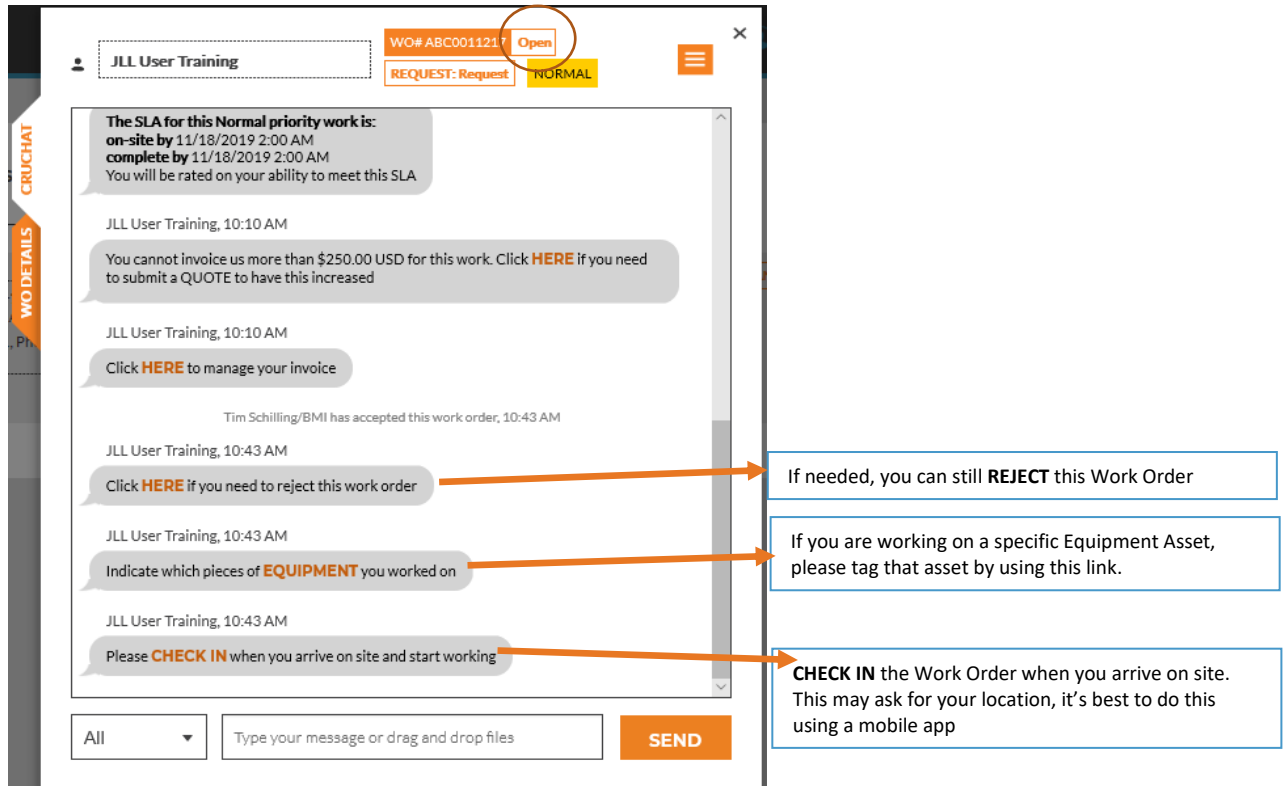
Links Contact info for reference as well as gives you the ability to schedule when you will be out on site

Lets you submit a quote to get a higher NTE. Typically won't be done at this stage of the WO lifecycle unless you know you will need a higher NTE

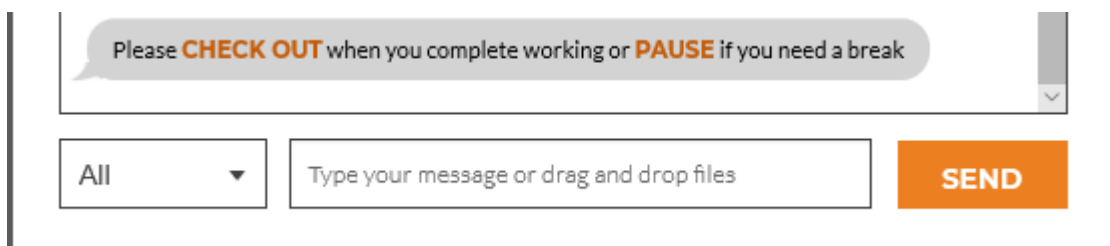
Accept the Work Order by clicking **ACCEPT** or decline the Work Order by clicking **REJECT**

You can send messages to your customer, Cru Leads or all Cru by typing into this free form text box, you can also attach a document to this WO by dragging a file over and dropping it anywhere

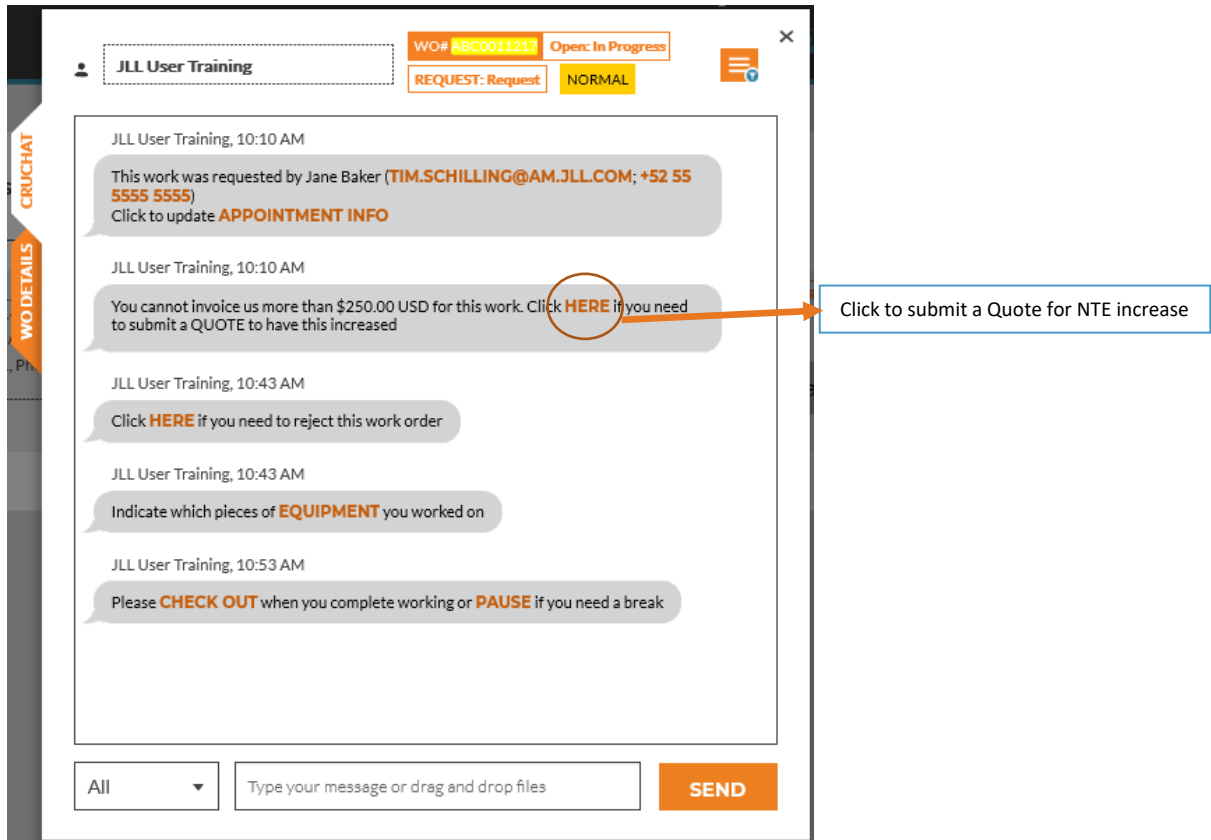
- If this work order is in scope and you will be able to service this request, accept the Work Order by clicking **ACCEPT** on the third bubble from the top, if not, click **REJECT**
- Now that the Work Order has been accepted, or "Picked Up", you will have three more available actions to you. Please also note that the WO State at the top of the pop-up has been updated from **Waiting for Acceptance** to **Open**
- You can also, at any point in time of the Work Order lifecycle, send a message to your customer, Cru Leads or all Cru, as well as attach a file to the Work Order by typing or drag/drop the file into the free form text box, as seen above



- When your technician arrives on-site, you can click **CHECK IN**
- After checking into the Work Order, please note that the state at the top changes to show **Open: In Progress**. You will also have another Available Action after checking into the work order, this action will be to either **CHECK OUT** or **PAUSE** the work order
- If you click **CHECK OUT** the Work Order will then prompt you to complete the work order. Please do not check out of a work order until the work is fully completed
- If you click **PAUSE** this will update the Work Order state to show as **Open: Paused**. This is for when you need to take a break from the work order, wait for quote approval, leave on lunch, or end your work day and come back another time.



- To submit a quote, select the below action where it says **HERE**



JLL User Training | WO# ABC0011217 | Open: In Progress | REQUEST: Request | NORMAL

JLL User Training, 10:10 AM
This work was requested by Jane Baker (TIM.SCHILLING@AM.JLL.COM; +52 55 5555 5555)
Click to update **APPOINTMENT INFO**

JLL User Training, 10:10 AM
You cannot invoice us more than \$250.00 USD for this work. Click **HERE** if you need to submit a QUOTE to have this increased

JLL User Training, 10:43 AM
Click **HERE** if you need to reject this work order

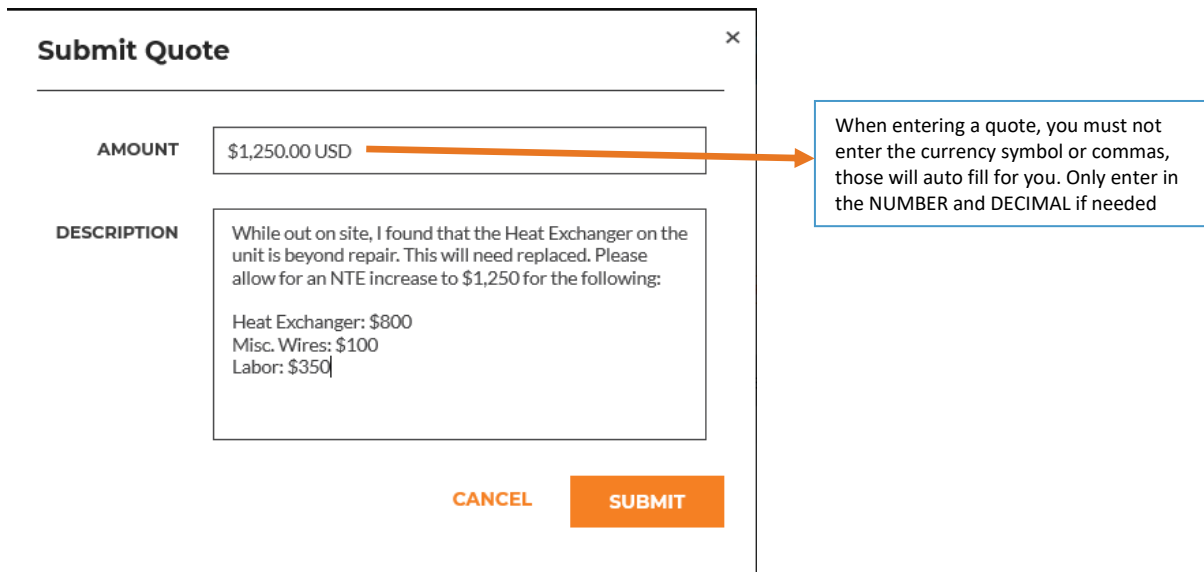
JLL User Training, 10:43 AM
Indicate which pieces of **EQUIPMENT** you worked on

JLL User Training, 10:53 AM
Please **CHECK OUT** when you complete working or **PAUSE** if you need a break

All | Type your message or drag and drop files | **SEND**

Click to submit a Quote for NTE increase

- Submitting a quote will only be for the dollar amount and description. If you have an itemized quote in another format such as word, excel, pdf, etc. please attach the document by dragging and attaching it to the Work Order



Submit Quote

AMOUNT | \$1,250.00 USD

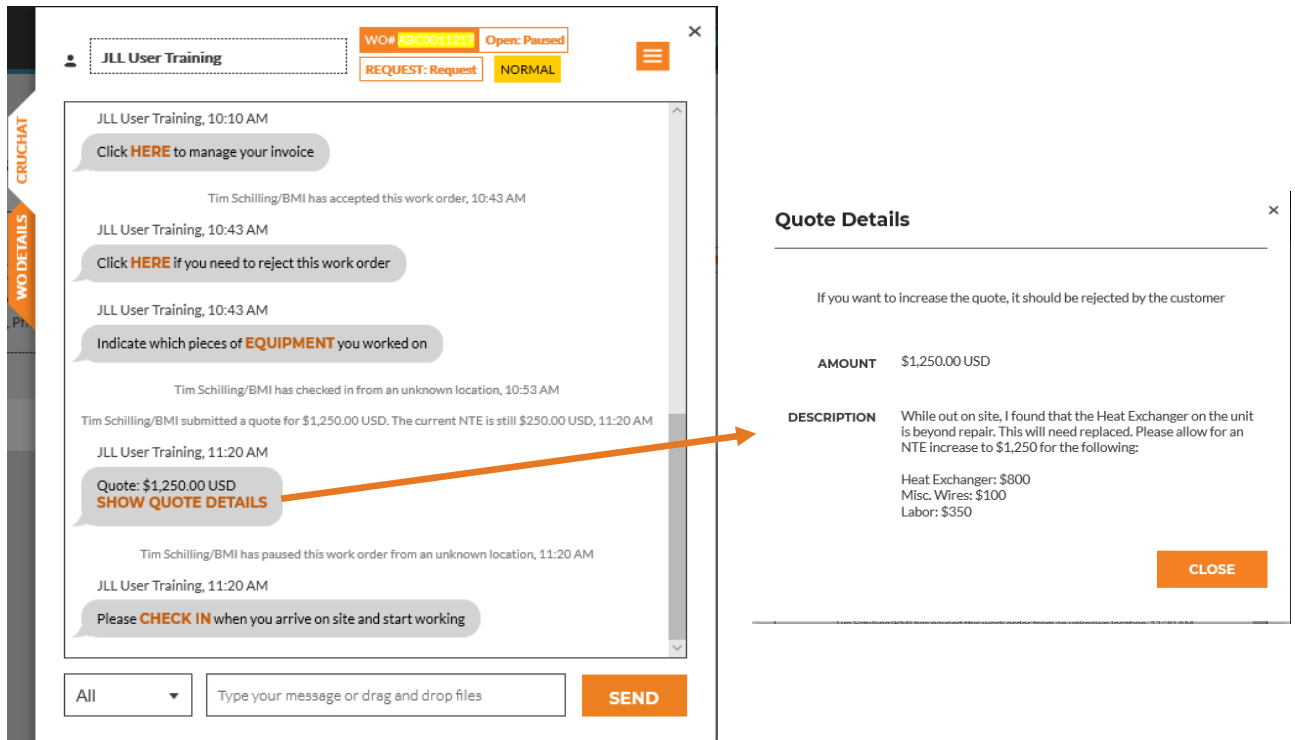
DESCRIPTION | While out on site, I found that the Heat Exchanger on the unit is beyond repair. This will need replaced. Please allow for an NTE increase to \$1,250 for the following:
Heat Exchanger: \$800
Misc. Wires: \$100
Labor: \$350

CANCEL | **SUBMIT**

When entering a quote, you must not enter the currency symbol or commas, those will auto fill for you. Only enter in the NUMBER and DECIMAL if needed

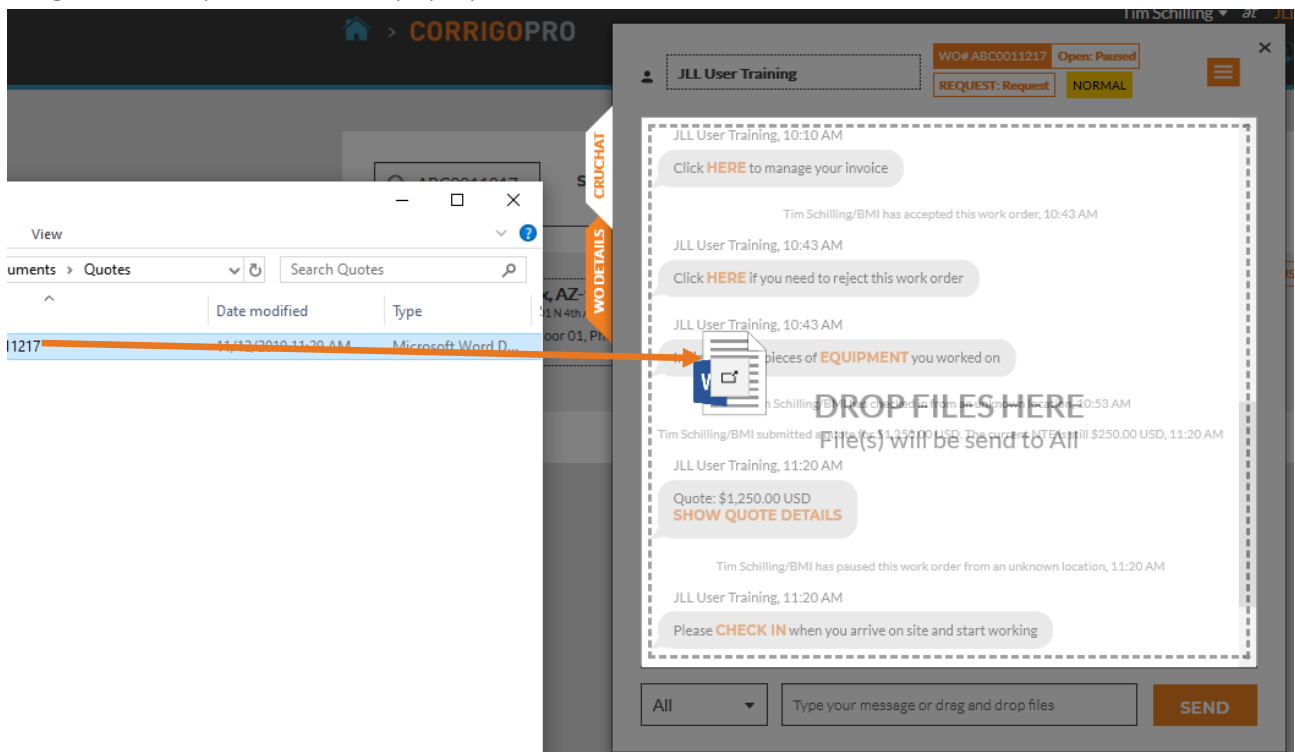
- Pause the Work Order while you are waiting for quote approval
- If you realized that the Quote amount that you submitted was not high enough, please ask for the customer to **REJECT** the quote so that you can submit another quote for approval

- After submitting for approval and pausing the WO, you will see one more Available Action, please note that the WO State at the top has again changed, this time to **Open: Paused**



The screenshot shows a chat window for 'JLL User Training' with a status bar at the top indicating 'WO# ABC0011217' and 'Open: Paused'. The chat history includes messages from 'JLL User Training' and 'Tim Schilling/BMI'. A message from 'JLL User Training' at 11:20 AM says 'Quote: \$1,250.00 USD' and 'SHOW QUOTE DETAILS'. An orange arrow points from this message to a 'Quote Details' pop-up window on the right. The pop-up shows the amount '\$1,250.00 USD' and a description: 'While out on site, I found that the Heat Exchanger on the unit is beyond repair. This will need replaced. Please allow for an NTE increase to \$1,250 for the following: Heat Exchanger: \$800, Misc. Wires: \$100, Labor: \$350'. There is a 'CLOSE' button at the bottom right of the pop-up.

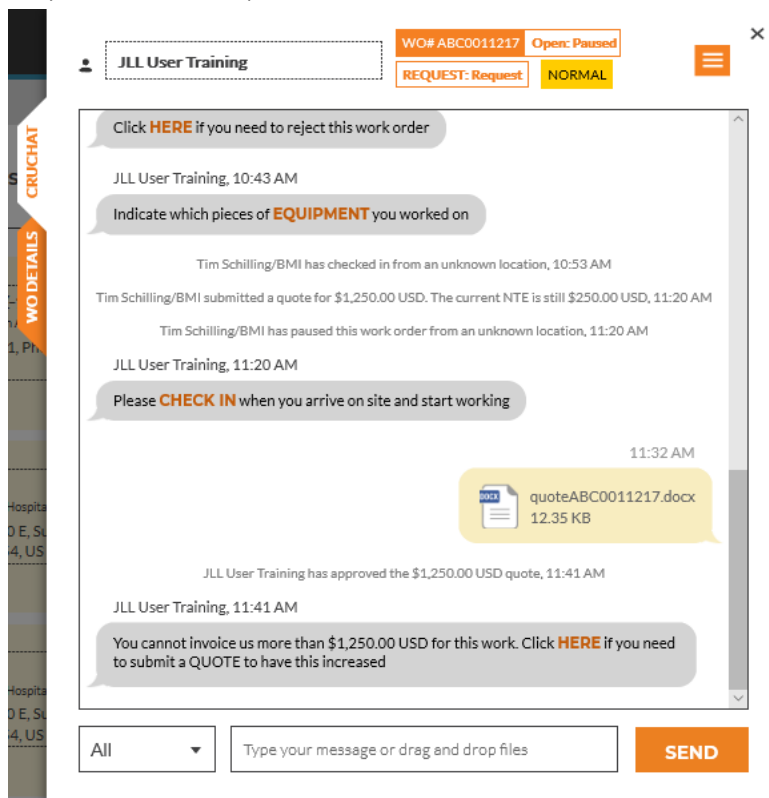
- To attach the itemized quote, pull up your documents where you have the quote saved, and drag the file anywhere on the pop up of the Work Order



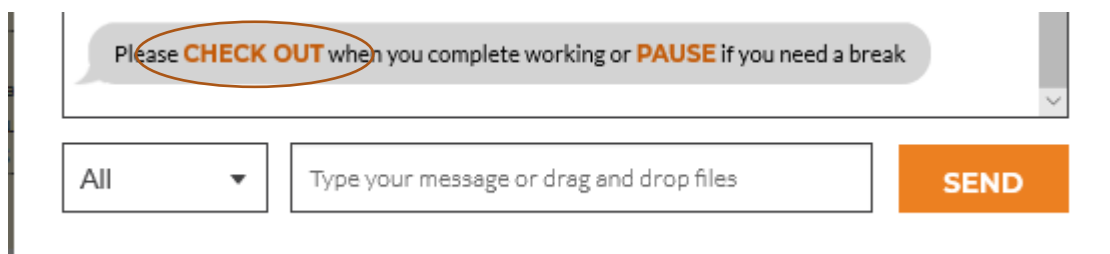
This screenshot shows a file explorer window in the foreground with a list of documents. The document '11217' is selected. An orange arrow points from this document to a 'DROP FILES HERE' area in the chat window. The chat window is the same as in the previous screenshot, but with a dashed box around the chat history and a 'DROP FILES HERE' text overlay. The status bar at the top of the chat window still shows 'WO# ABC0011217' and 'Open: Paused'.

- After quote approval has been received, you can check in the Work Order again and complete the work as scheduled

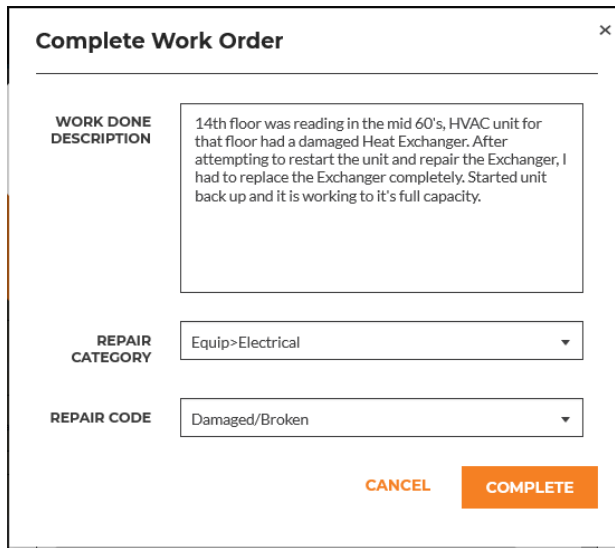
- You will be notified via email, based on your settings (covered above) when the quote is approved, you also will be notified on the CruChats view, as the Work Order will work it's way back to the top of the CruChats and have a notification telling you the new NTE



- CHECK IN** the work order to complete the work once you have all the materials acquired
- Once the work has been fully completed, please click on **CHECK OUT** to complete the Work Order



- Checking out of a Work Order will prompt you to complete the Work Order, enter in a description of the work done and fill out the failure code as necessary



Complete Work Order

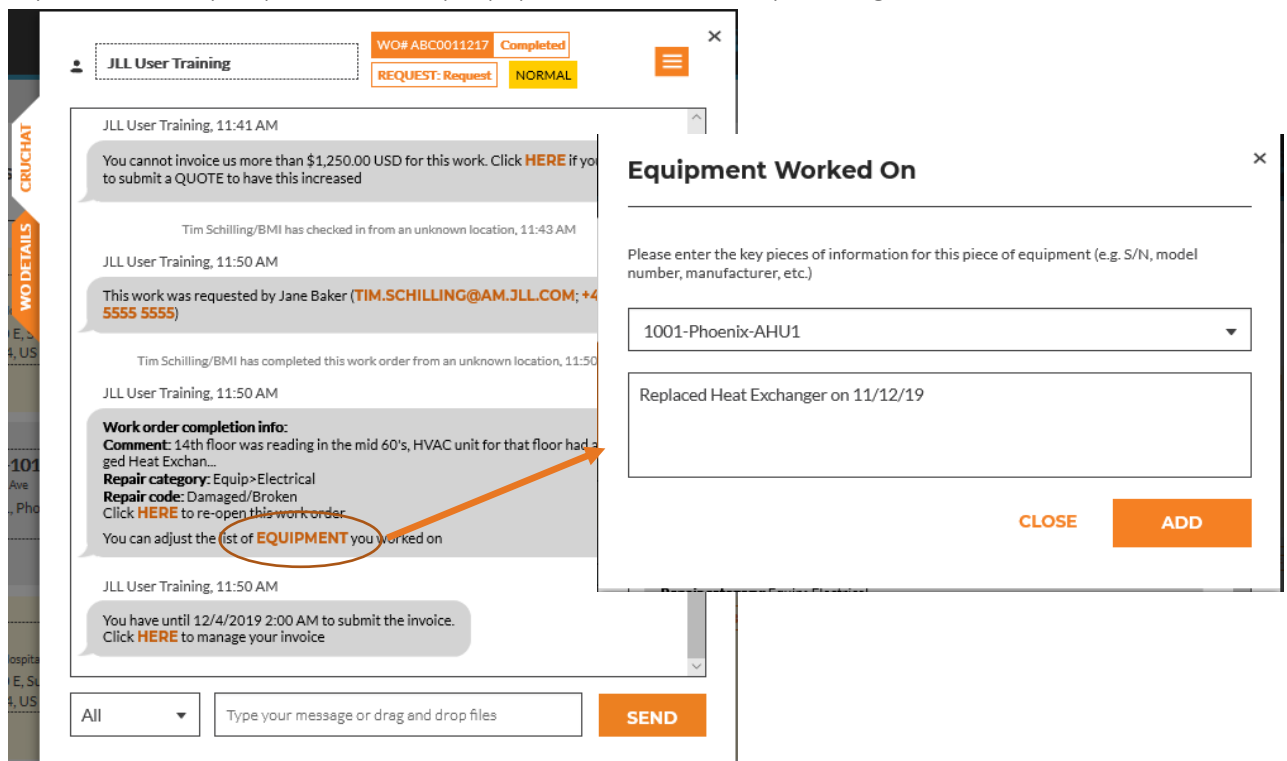
WORK DONE DESCRIPTION
14th floor was reading in the mid 60's, HVAC unit for that floor had a damaged Heat Exchanger. After attempting to restart the unit and repair the Exchanger, I had to replace the Exchanger completely. Started unit back up and it is working to it's full capacity.

REPAIR CATEGORY
Equip>Electrical

REPAIR CODE
Damaged/Broken

CANCEL **COMPLETE**

- Click on Complete to complete the Work Order
- If you have not yet, please add any Equipment worked on by clicking on **EQUIPMENT**



JLL User Training WO# ABC0011217 **Completed**
REQUEST: Request **NORMAL**

JLL User Training, 11:41 AM
You cannot invoice us more than \$1,250.00 USD for this work. Click [HERE](#) if you want to submit a QUOTE to have this increased

Tim Schilling/BMI has checked in from an unknown location, 11:43 AM

JLL User Training, 11:50 AM
This work was requested by Jane Baker (TIM.SCHILLING@AM.JLL.COM; +45555 5555)

Tim Schilling/BMI has completed this work order from an unknown location, 11:50 AM

JLL User Training, 11:50 AM
Work order completion info:
Comment: 14th floor was reading in the mid 60's, HVAC unit for that floor had a damaged Heat Exchanger...
Repair category: Equip>Electrical
Repair code: Damaged/Broken
Click [HERE](#) to re-open this work order.
You can adjust the list of **EQUIPMENT** you worked on

JLL User Training, 11:50 AM
You have until 12/4/2019 2:00 AM to submit the invoice. Click [HERE](#) to manage your invoice.

Equipment Worked On

Please enter the key pieces of information for this piece of equipment (e.g. S/N, model number, manufacturer, etc.)

1001-Phoenix-AHU1

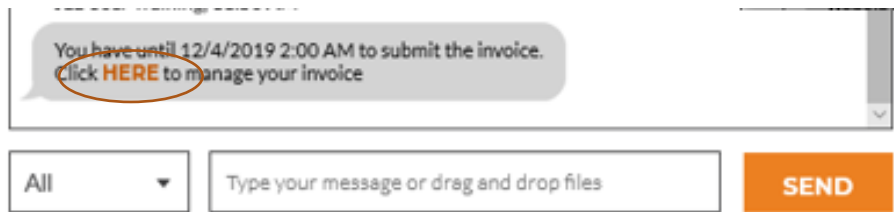
Replaced Heat Exchanger on 11/12/19

CLOSE **ADD**

SEND

- Once you have completed the Work Order and the Equipment worked on has been added, you can finally invoice the Work Order
- For some customers, you will not be able to submit an invoice or receive payment on your invoice until the Work Order is verified

- Click **HERE** to manage your invoice to bring up the Invoicing App



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