



**CORRIGOPRO**

CorrigoPro Desktop v5.2  
Release Highlights

# Internal Note



Introducing the ability to add an internal note to WO CruChat. It will not be visible to a customer, but will be available for Cru and Subs. The Internal Note tab is color coded orange when an internal note exists and blue when empty.

This screenshot shows the 'INTERNAL NOTE' tab selected in the left-hand navigation menu. The tab is orange, indicating that an internal note is present. The main content area displays the text: 'INTERNAL NOTE' followed by 'It will not be visible for a customer, but will be available for Cru, CruLeads and Subs.' Below this is a large text input field containing 'TFS3468'. At the bottom right of the input field is a 'SAVE' button. The top of the interface shows the work order details: 'QaEplCallcenter92su3', 'WO# CA2308 Completed', 'REQUEST: Request', and 'PRIORITY A'. The bottom of the interface shows an 'ACTION HISTORY' section.

This screenshot shows the 'INTERNAL NOTE' tab selected in the left-hand navigation menu. The tab is blue, indicating that no internal note is currently present. The main content area is empty. The top of the interface shows the work order details: 'QaEplCallcente'. The bottom of the interface shows a dropdown menu with 'Cru' selected.

This screenshot shows the 'INTERNAL NOTE' tab selected in the left-hand navigation menu. The tab is orange, indicating that an internal note is present. The main content area displays a chat conversation with a customer named 'QaEplCallcenter9'. The chat messages include: 'This work was rec', 'Oksana', 'QaEplCallcenter9', 'Work order comp', 'Repair category: C', 'Repair code: ""', 'date: 12/20/2019', 'Lorem ipsum dolo', 'SI TEST Currency', 'Click [HERE](#) to re', 'You can adjust the', 'QaEplCallcenter9', 'Click [HERE](#) to ma', 'QaEplCallcenter9', 'Oksana has submi'. At the bottom of the interface is a dropdown menu with 'Cru' selected.

# Internal Note



The history of the Internal Note changes will be available in the Action History section.

The top screenshot shows the 'INTERNAL N' interface with a 'SAVE' button and a collapsed 'ACTION HISTORY' section. The bottom screenshot shows the same interface with the 'ACTION HISTORY' section expanded, displaying a table of changes.

DATE	BY	NEW VALUE
1/13/2020 2:10 PM	Oksana	TFS3468
1/13/2020 2:10 PM	Oksana	Test

# Internal Note – WO export and table view



The Internal Note field is available in the table view and WO export to Excel/CSV.

STATUS: Any ▾
WO STATE: Any ▾
COMPLETE BY: Any ▾
DEFAULT\* ▾
☰

<input type="checkbox"/>	WO NUMBER	PRIORITY	CUSTOMER	INTERNAL NOTE ↓	LAST ACTIVIT...	LAST MESSAGE
<input type="checkbox"/>	CA2406	Priority B/C	QaEplCallcenter92s...	TGD578768	Friday	Attachment added
<input type="checkbox"/>	CA2308	Priority A	QaEplCallcenter92s...	TFS3468	Friday	Oksana has added My Firs Company to this CruChat
<input type="checkbox"/>	CA2259	Priority A	QaEplCallcenter92s...	Test note	2:24 PM	Test
<input type="checkbox"/>	CA2371	Priority E	QaEplCallcenter92s...	DYUG5453	1/3/2020	NTE: \$2,000.00 USD
<input type="checkbox"/>	53490269	Priority A	QaEplCallcenter92s... Visits		Friday	Test

Exported from: Oksana New Company!												
WO Number	Requestor	Requested By	Branch	NTE	Quoted NTE	Currency	Occupier	Space	Service Location	Problem	Internal note	Warrar
CA2259	QaEplCallcenter92su3	Asya Asya c37829@t	Oksana New Company!	\$0.00	\$0.00	USD	@Corrigo Te	Protasiv	Protasiv Yar St, 2,	•Asset: D	Test note	
CA2308	QaEplCallcenter92su3	Asya Asya c37829@t	Oksana New Company!	\$400.00	\$400.00	USD	@Corrigo Te	Protasiv	Protasiv Yar St, 2,	•Asset: E	TFS3468	
CA2371	QaEplCallcenter92su3	Asya Asya c37829@t	Oksana New Company!	\$2,000.00	\$0.00	USD	@Corrigo Te	Protasiv	Protasiv Yar St, 2,	•Asset: F	DYUG5453	
CA2406	QaEplCallcenter92su3	Asya Asya c37829@t	Oksana New Company!	\$0.00	\$0.00	USD	@Corrigo Te	Protasiv	Protasiv Yar St, 2,	•Asset: F	TGD578768	

# WO export extended with invoice payment info



Added 3 invoice payment related columns to both the WO table view and WO export. This information is shown to users according to visibility settings configured in CorrigoPro

STATUS: Any ▾
WO STATE: Completed ▾
COMPLETE BY: Any ▾
DEFAULT\* ▾
☰

WO NUMBER	PRIORITY	CUSTOMER	PAYMENT DATE	CHECK NUMBER	PAYMENT AMOUNT ↓	NTE
<input type="checkbox"/> CA1448	Priority A	QaEplCallcenter92s... Visits	4/10/2019	23255334	\$34,500.00 CAD	\$12.00 CAD
<input type="checkbox"/> CA1444	Priority A	QaEplCallcenter92s... Visits	5/21/2019	456543	\$5,000.00 CAD	\$400.00 CAI
<input type="checkbox"/> CA2259	Priority A	QaEplCallcenter92s...			\$0.00 USD	\$0.00 USD

<b>Exported from:</b>	Oksana New Company!						
WO Number	Requestor	Invoice Number	Invoice Total	Payment Date	Check Number	Payment Amount	Completed on
CA1444	QaEplCallcenter92su3 Vis	CA1444	\$4,800.00	5/21/2019	456543	\$5,000.00	4/24/2019
CA1448	QaEplCallcenter92su3 Vis	CA1448	\$585.00	4/10/2019	23255334	\$34,500.00	4/25/2019
CA2259	QaEplCallcenter92su3		\$0.00			\$0.00	1/17/2020

# WO search extended with new fields



WO Search has been extended to include more fields: internal note, accompanying message, contact information (name, email and phone) and problem description (asset, task, description)

STATUS: Any ▼ WO STATE: Completed ▼ COMPLETE BY: Any ▼ DEFAULT \* ▼

WO NUMBER	PRIORITY	CUSTOMER	PROBLEM	INTERNAL NOTE
<input type="checkbox"/> CA1699	Priority A	QaEplCallcenter92su Visits	<ul style="list-style-type: none"><li>Asset: Lighting</li><li>Task: Repair roof light</li><li>Details:</li></ul>	

STATUS: Any ▼ WO STATE: Completed ▼ COMPLETE BY: Any ▼ DEFAULT \* ▼

WO NUMBER	PRIORITY	CUSTOMER	PROBLEM	INTERNAL NOTE
<input type="checkbox"/> CA2406	Priority B/C	QaEplCallcenter92su3	<ul style="list-style-type: none"><li>Asset: Fire Extinguisher</li><li>Task: Due for Inspection</li><li>Details:</li></ul>	TGD578768

# Message audience confirmation in CruChats



The message audience in CruChat is determined by the system based on the user's answers for whether a message should be received by Customer, Subs and CruMembers. The feature can be disabled by pressing "Don't ask me again" (the message will be sent to user defined audience).

## 1<sup>st</sup> QUESTION

### Confirm Message Audience



Do you want your Customer to receive this message?

Don't ask me again

NO

YES

## 2<sup>nd</sup> QUESTION

### Confirm Message Audience



Do you want your Subs and CruMembers to receive this message?

Don't ask me again

NO

YES

The screenshot shows a chat interface. At the top right, the time is 4:35 PM. A message bubble contains the text "Test" and a red icon with the text "Sent to CruLeads only". Below the message is a text input field with a dropdown menu set to "CruLeads" and a "SEND" button. A red box highlights the "CruLeads" dropdown, and another red box highlights the message bubble. An orange arrow points from the "CruLeads" dropdown to the "SEND" button.

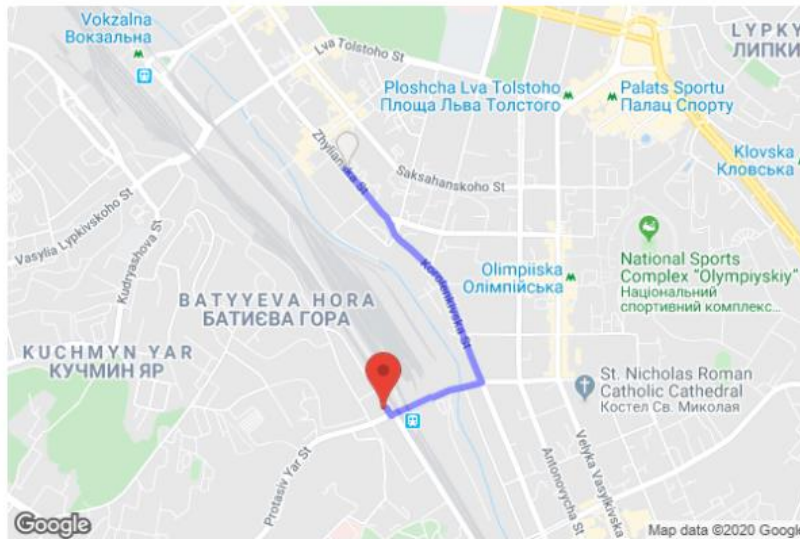
# Map with route if too far from service location



If a user tries to check-in/out or pause a WO far from service location, they will see a map with a route to the location. The user may choose to open it in their favorite map application by tapping on the route

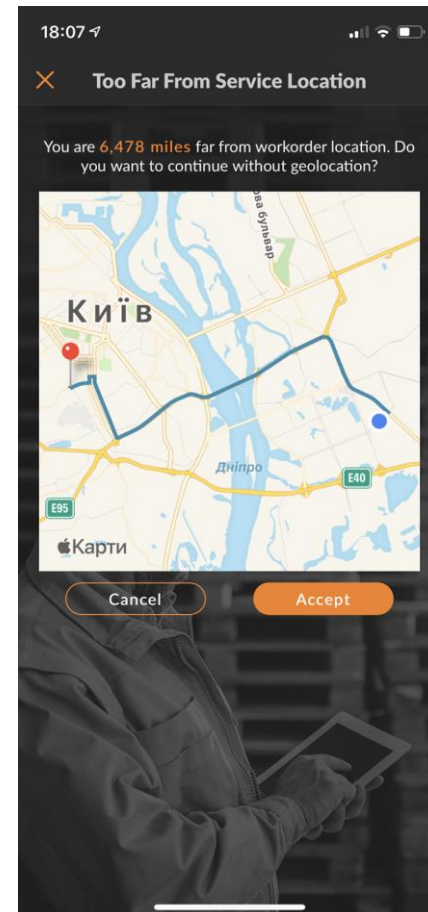
## Too Far From Service Location

You are **0.69 miles** far from workorder location. Do you want to continue without geolocation?



CANCEL

ACCEPT





# Cookies policy acceptance



Users now have to accept the Cookies Policy to continue using the CorrigoPro application. They can review the full list of used Cookies and their purpose. Cookies can be disabled using browser settings, however some parts of the application may not work properly

The screenshot shows the Corrigopro Desktop application interface. At the top left is the 'CORRIGOPRO DESKTOP' logo. The top right shows user information: 'Oksana 40 user' and 'at Oksana Test user registra...'. There are also language and location icons for 'English' and a home icon. The main content area is divided into several sections: 1. A 'HOW DO I...?' section with a background image of people working, containing links for navigation, communication, and invoicing. 2. A 'Complete your Company Profile' section with a progress indicator showing 'now at 75%' and two checklist items: 'Improves your public appearance' and 'Gets you more work'. 3. A red warning box with a white exclamation mark and the text 'Please select your membership level'. 4. A 'Manage Your Work Orders and Customer Communication in Corrigopro' section with a '0 unread messages' notification. 5. A small image of a worker in a hard hat using a tablet.

This website uses cookies





This website stores cookies on your computer. Some of them are essential, while other stores you selections and preferences, collect information about how you interact with our website. We use this information in order to improve and customize you browsing experience on this website and for analytics and metrics. To find out more about the cookies we use, see our [Cookies Policy](#).

ACCEPT

# Company profile extended with new fields



Company general information extended with social media links

	Company ID: 502107
<b>Oksana New Company</b>	
  	
<b>BUSINESS OVERVIEW</b>	Test
<b>DOING BUSINESS AS (DBA)</b>	<input type="text" value="Test DBA!"/>
<b>IN BUSINESS SINCE</b>	<input type="text" value="1992"/>
<b>TAXPAYER IDENTIFICATION NUMBER (TIN)</b>	<input type="text" value="*****123"/>
<b>TAX EXEMPT</b>	<input type="checkbox" value="NO"/>
<b>DUN &amp; BRADSTREET NUMBER</b>	<input type="text" value="121123"/>
<b>CHECK US ON YELP</b> <input type="text"/>	
<b>FACEBOOK</b> <input type="text"/>	
<b>TWITTER</b> <input type="text"/>	
<b>LINKEDIN</b> <input type="text"/>	

# Company profile extended with new fields



Branch information extended with the number of technicians per branch

BRANCH ID 502599

NAME	<input type="text" value="Oksana New Company!"/>	EMAIL	<input type="text" value="oksana.shevchuk+u1@globallogic.com"/>
ADDRESS	<input type="text" value="123, test, Los Angeles, CA, US, 02091"/>	PHONE	<input type="text" value="🇺🇦 073 210 7449"/>
WEB SITE	<input type="text"/>	FAX	<input type="text" value="🇺🇸"/>
FREE ESTIMATES	<input type="button" value="NO"/>	EMERGENCY SERVICE	<input type="button" value="NO"/>
PREFERRED CURRENCY	<input type="text" value="USD"/>	EMERGENCY PHONE	<input type="text" value="🇺🇸"/>
NUMBER OF TECHS	<input type="text" value="20 - 50"/>	<input type="text"/>	
SERVICES	<input type="text"/>		
WORK HOURS	<input type="text" value="10 AM"/> - <input type="text" value="1:30 AM"/>	<input type="text"/>	

Wed  Closed

20 - 50

Less than 20

20 - 50

50 - 100

100 - 200

200 - 500

# Multiple types of company contacts



Introducing the ability to add multi-type contacts to company profile

## Edit Contact



COMPANY-WIDE

TYPE Primary Owner/Manager Marketing ▼

TITLE Primary

FIRST NAME Owner/Manager

LAST NAME Finance

PHONE NUMBER Technical/IT

EMAIL Marketing

PREFERRED CONTACT METHOD

PREFERRED LANGUAGE(S)

SHARE WITH

**Mr. Test Contact**

+1 321-441-2098

test@gmail.com

**Preferred contact method:** Text

**Preferred language(s):** English, En...

**Primary, Marketing**



CANCEL

SAVE

# Corrigo Assure provider notifications

Three new email notification types are available for providers:

- Screening/Insurance Status Changed – notifications regarding insurance/screening status changes
  - Assure Compliance Update – notifications for when the company becomes compliant/non-compliant for a particular customer
    - Insurance Expiration Warning – reminder to upload renewed insurance policy
- All administrators are automatically subscribed to receive these notifications

## Settings

GENERAL

ALERTS

Manage email alert subscriptions.



## Company alerts

Recipient	Assure Compliance Update	Insurance Expiration Warning	Screening/Insurance Status Changed
sergii.iavtushkevych+1 ~!@#\$\$%^&*()_]" ?>>"}{<' ёБІвытав ~!@#\$... sergii.iavtushkevych+1@globallogic.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Volodymyr Test verygregy+lol1@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Oksana oksana.shevchuk+u1@globallogic.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Other Changes

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- Internal Note field is also available via CorrigoPro Direct. More information is available on our developers site <https://developer.corrigopro.com/docs/intro>
- Added new countries – Belgium, Austria, Luxembourg, South Africa, Romania and Sweden.
- Allow leaving a user in all CruChats when changing role from CruLead to CruMember.