



CORRIGOPRO

**CorrigoPro v5.2 SU1
Release Highlights**

Document Management



Introducing WO and invoice attachments management functionality, includes document adding, editing and deleting in one place – WO Details page or Invoice page.

Note that visit and procedure attachments did not change.

QaEplCallcenter92su3

WO# WOV0113 Open

REQUEST: Request PRIORITY A

WORK ORDER COMPLETION INFO

Comment: Verification:
Repair Category: Verification Notes:
Repair Code:

DOCUMENTS

CUSTOMER

- TROPHY Sent on 3/13/2020 3:07 PM by QaEplCallcenter92su3
- 2019-09-12T15_11_31.088Z_WEATHERFORECAST Sent on 3/13/2020 3:21 PM by QaEplCallcenter92su3

WORK ORDER

- APPLE-LOGO1 Sent on 3/13/2020 3:14 PM by Oksana
- CRIME INSURANCE Sent on 3/13/2020 3:22 PM by Oksana

INVOICE

- PRICE LIST Sent on 3/13/2020 3:09 PM by Oksana (Waiting to be sent to Customer)
- AWARD Sent on 3/13/2020 4:53 PM by Oksana (Waiting to be sent to Customer)

Invoice for Work Order #WOV0113 PENDING WO COMPLETION

TOTAL \$0.00 USD

WORK ORDER COMPLETION DETAILS

ATTACHMENTS

UPLOAD YOUR ATTACHMENTS or drag and drop them here

CUSTOMER

- TROPHY Sent on 3/13/2020 3:07 PM by QaEplCallcenter92su3
- 2019-09-12T15_11_31.088Z_WEATHERFORECAST Sent on 3/13/2020 3:21 PM by QaEplCallcenter92su3

WORK ORDER

- APPLE-LOGO1 Sent on 3/13/2020 3:14 PM by Oksana
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INVOICE

- PRICE LIST Sent on 3/13/2020 3:09 PM by Oksana (Waiting to be sent to Customer)
- AWARD Sent on 3/13/2020 4:53 PM by Oksana (Waiting to be sent to Customer)

ACTION HISTORY

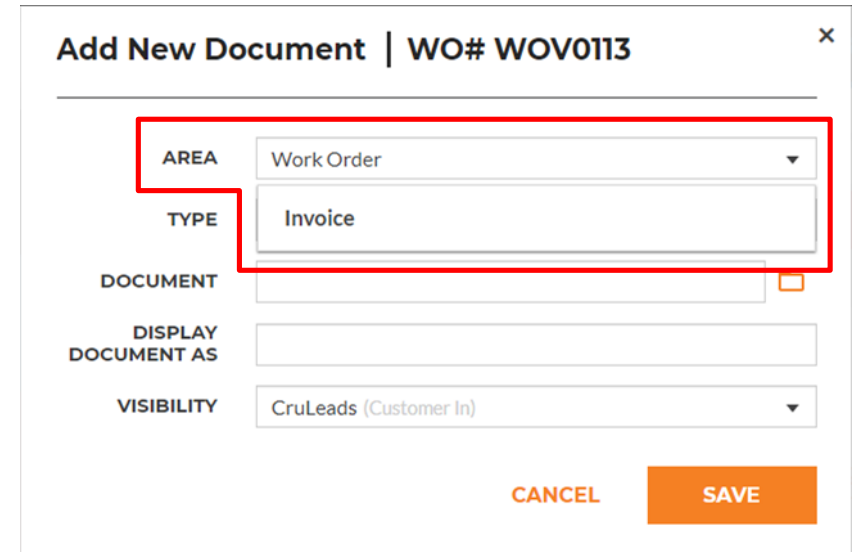
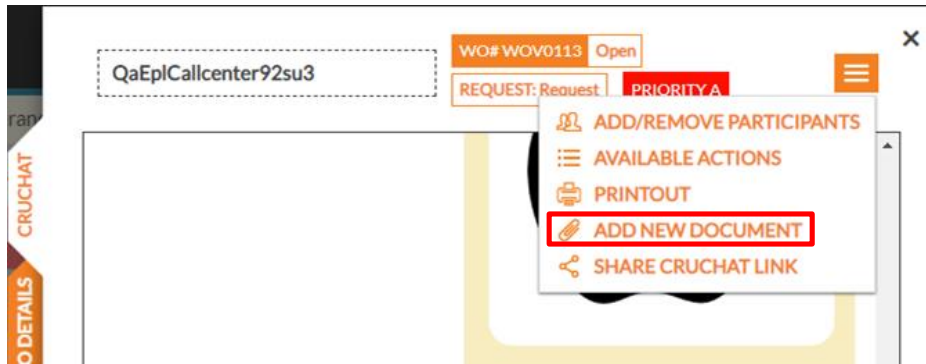
RESET

Document Management – Add document

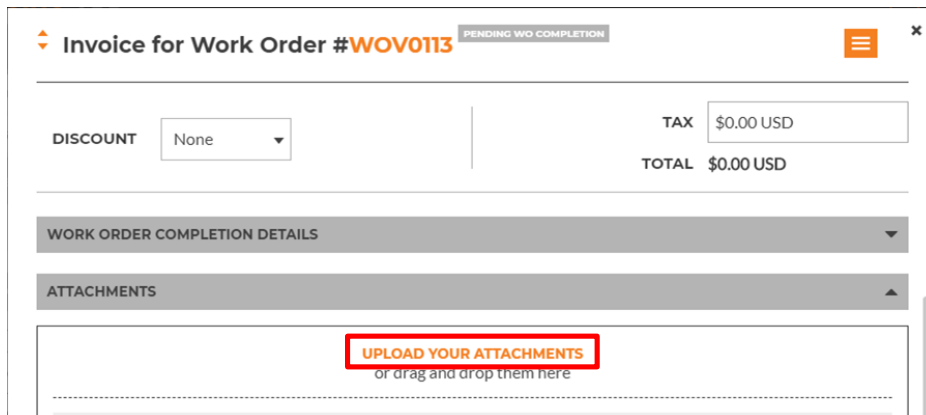


To add a document you need to select an area it belongs to, WO or Invoice. However, if you drag & drop a file it will automatically be added to the area where you drop it (e.g. drop a document into Invoice and it will be added to the invoice area).

CRUCHAT



INVOICE



Document Management – Add document



Documents have several parameters like Display As or Type you can adjust. All this information will be shared with your customer. You can also select visibility for WO documents like for other messages but all invoice documents will be shared with customer when the invoice is submitted.

Add New Document | WO# WOV0113

AREA Work Order

TYPE Picture

DOCUMENT award.png

DISPLAY DOCUMENT AS award

VISIBILITY CruLeads (Customer In)

CANCEL **SAVE**

Add New Document | WO# WOV0113

! The document will be sent to the customer when the invoice is submitted

AREA Invoice

TYPE Picture

DOCUMENT award.png

DISPLAY DOCUMENT AS award

CANCEL **SAVE**

Document Management – Edit document



Edit attachment feature can be accessed from both the invoice attachments section and documents section on the WO Details tab of a CruChat.

In addition this CruChat view allows editing a document by right-clicking on the document.

Documents shared by the customer, as well as signature documents are read-only.

QaEplCallcenter92su3

WO# WOV0113 Open

REQUEST: Request PRIORITY A

WORK ORDER COMPLETION INFO



Comment: Repair Category: Repair Code: Verification: Verification Notes:

DOCUMENTS



CUSTOMER

- TROPHY Sent on 3/13/2020 3:07 PM by QaEplCallcenter92su3
- 2019-09-12T15_11_31.088Z_WEATHERFORECAST Sent on 3/13/2020 3:21 PM by QaEplCallcenter92su3

WORK ORDER

- APPLE-LOGO1 Sent on 3/13/2020 3:14 PM by Oksana 
- CRIME INSURANCE Sent on 3/13/2020 3:22 PM by Oksana 

INVOICE

- PRICE LIST Sent on 3/13/2020 3:09 PM by Oksana  Waiting to be sent to Customer
- AWARD Sent on 3/13/2020 4:53 PM by Oksana  Waiting to be sent to Customer

QaEplCallcenter92su3

WO# WOV0113 Open



REQUEST: Request PRIORITY A

System Administrator @ QaEplCallcenter92su3, 4:03 PM

Please, fix it asap

pdf - Copy (6) - Copy - Copy.pdf document has been removed by the Dmytro, 4:07 PM

award 25.25 KB

  EDIT

Waiting to be sent to Customer

CruLeads Type your message or drag and drop files SEND

Document Management – Edit document



You can change document area, type, display as and visibility (only for WO attachments). Attachment delete is also available on this dialog.

Invoice documents can be added, edited or deleted only if invoice is not submitted to the customer.

Edit Document | WO# WOV0113


AREA: Work Order

TYPE: Picture

DOCUMENT: award.png

DISPLAY DOCUMENT AS: award

VISIBILITY: Cru (Customer Out)

 CANCEL SAVE

Invoice for Work Order #WOV0113 SUBMITTED

DISCOUNT None TAX \$0.00 USD
TOTAL \$300.00 USD

WORK ORDER COMPLETION DETAILS

ATTACHMENTS

CUSTOMER

- TROPHY Sent on 3/13/2020 3:07 PM by QaEpiCallcenter92su3
- 2019-09-12T15_11_31.088Z_WEATHERFORECAST Sent on 3/13/2020 3:21 PM by QaEpiCallcenter92su3

WORK ORDER

- APPLE-LOGO1 Sent on 3/13/2020 3:14 PM by Oksana LEADS
- CRIME INSURANCE Sent on 3/13/2020 3:22 PM by Oksana ALL

INVOICE

- PRICE LIST Sent on 3/13/2020 3:09 PM by Oksana
- AWARD Sent on 3/13/2020 4:53 PM by Oksana

ACTION HISTORY

Document Management – Delete document



In the Advanced Settings you can configure whether CruMembers are allowed to delete documents or restrict them from deleting documents.

The screenshot shows the CORRIGOPRO user interface. At the top, there is a navigation bar with the user's name 'Oksana', company 'Oksana New Company', and language 'English'. Below the navigation bar are three warning banners: 'Your Commercial Auto insurance expires in 16 days', 'Your General Liability insurance expires in 19 days', and 'Your company failed some Corrigo Assure screenings and some insurance verifications'. The main content area is titled 'Settings' and has two tabs: 'NOTIFICATIONS' and 'ADVANCED'. The 'ADVANCED' tab is selected. Under the 'FINANCIAL' section, there are three settings, all set to 'OFF': 'Do not show invoicing info on CruChats', 'Do not show invoicing info to CruMember users', and 'Do not show NTE to CruMember users'. Under the 'WORK ORDER FLOW' section, there are three settings: 'Capture customer signatures' (ON), 'Visit work order auto completion' (ON), and 'Allow CruMember users to delete documents' (OFF). The 'Allow CruMember users to delete documents' setting is highlighted with a red box. A 'SAVE' button is located at the bottom right of the settings area.

Document Management – Invoice Documents Visibility



Invoice documents will be displayed in the chat and on the WO details page based on financial settings. It will be hidden from users if Do not show invoicing info on CruChats is switched On

It will be hidden from CruMembers if Do not show invoicing info to CruMember users is On.

Settings NOTIFICATIONS **ADVANCED**

FINANCIAL

Do not show invoicing info on CruChats <i>i</i>	OFF
Do not show invoicing info to CruMember users <i>i</i>	OFF
Do not show NTE to CruMember users <i>i</i>	OFF

WORK ORDER FLOW

Capture customer signatures <i>i</i>	ON
Visit work order autocompletion <i>i</i>	ON
Allow CruMember users to delete documents <i>i</i>	OFF

Invoice documents are always hidden from subs. **SAVE**

Invoice Printout Validation



A document with the new type 'Invoice Printout' may be required to be added prior to invoice submission for some countries.

Invoice for Work Order #A13674 DRAFT

Warning: This invoice cannot be submitted because the invoice printout is missing.

CUSTOMER qa accept 9gA
LAST UPDATE DATE 3/17/2020
NTE €466.00 EUR
TIME ON SITE -- [VIEW](#)
INVOICE BY 3/19/2020 1:00 AM

INVOICE DATE 3/17/2020
INVOICE # A13674 [USE WO#](#)

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Parts & Materials	Material	1.00	€45.0000	€45.00
Shipping	Postal fee	1.00	€50.0000	€50.00
Services	Service	1.00	€100.0000	€100.00
Please select		1.00	€0.0000	€0.00

DISCOUNT None
TAX
TOTAL €195.00 EUR

Provider Operating As A Supplier – WO Complete After Accept



A new functionality allows customers to mark your company as a supplier. If your company is marked as supplier the system will allow the provider to complete all WOs after accept.

QaEplCallcenter92su3

WO# WOV0130 Open
REQUEST: Request PRIORITY A

QaEplCallcenter92su3, 6:55 PM
Click [HERE](#) to manage your invoice

QaEplCallcenter92su3, 6:55 PM
To check-in/check-out using the IVR, call +1855-288-0920 and enter code 957235349. Click [HERE](#) for additional instructions from the customer.

Oksana has accepted this work order, 6:56 PM

QaEplCallcenter92su3, 6:56 PM
Click [HERE](#) if you need to reject this work order

QaEplCallcenter92su3, 6:56 PM
Indicate which pieces of **EQUIPMENT** you worked on required by the customer

QaEplCallcenter92su3, 6:56 PM
You have an option to **COMPLETE** this work order without checking in and checking out on site. These actions will be unavailable once your work order is completed

QaEplCallcenter92su3, 6:56 PM
Please **CHECK IN** when you arrive on site and start working

All Type your message or drag and drop files SEND

QaEplCallcenter92su3

WO# WOV0132 Open PMRM: PMRM
PRIORITY B/C

QaEplCallcenter92su3, 7:04 PM
Click [HERE](#) to manage your invoice

QaEplCallcenter92su3, 7:04 PM
To check-in/check-out using the IVR, call +1855-288-0920 and enter code 990622645. Click [HERE](#) for additional instructions from the customer.

Oksana has accepted this work order, 7:04 PM

QaEplCallcenter92su3, 7:04 PM
Click [HERE](#) if you need to reject this work order

QaEplCallcenter92su3, 7:04 PM
Indicate which pieces of **EQUIPMENT** you worked on required by the customer

QaEplCallcenter92su3, 7:04 PM
You have an option to **COMPLETE** this work order without checking in and checking out on site. These actions will be unavailable once your work order is completed

QaEplCallcenter92su3, 7:04 PM
Please **CHECK IN** when you arrive on site and start working

All Type your message or drag and drop files SEND

Provider Operating As A Supplier – Bulk Reactive WO Complete



Bulk complete of WOs of any type will be available for companies marked as suppliers by their customers.

Search Chats

STATUS: Any ▼ WO STATE: Open, Open: In Progress ▼ COMPLETE BY: Any ▼
* CUSTOMERS: QaEplCallcenter92su3 ▼ * TYPE: Request, Request (qa epl 90t ▼

3 CruChat(s) selected **SELECT ALL CUSTOMER CRUCHATS** or **SELECT NONE**

BULK ACTIONS ▼
ACCEPT WOS
COMPLETE WOS
EDIT PARTICIPANTS
EXPORT ▼
MOBILE USER INFO
MORE FILTERS ▼

QaEplCallcenter92su3
@Corrigo Test @\$%^&*()_+""...
Protasiv Yar St, 2, Kyiv, 02000
Protasiv Yar St, 2, Kyiv, 02000, Kyiv, 02000, UA
Please check in when you arrive on site and start working
QaEplCallcenter92su3
WO# WOV0130 OP

QaEplCallcenter92su3
LSh Store
LSh Space
Attachment added
Dmytro
WO# 130776 OPEN: IN PROGRESS REQUEST: Request 3/2/2020
PRIORITY A

QaEplCallcenter92su3
@Corrigo Test @\$%^&*()_+""...
Protasiv Yar St, 2, Kyiv, 02000
Protasiv Yar St, 2, Kyiv, 02000, Kyiv, 02000, UA
Oksana has added Oksana Again New User and My First Company to this CruChat
WO# CA2258 OPEN REQUEST: Request 12/11/2019
PRIORITY E

QaEplCallcenter92su3
WO# <""-!@#%\$^&*()_+""...> OPEN: IN PROGRESS REQUEST: Request 12/11/2019

WO Contact Information Updates

Change of WO contact information on the customer side will now be visible in the CorrigoPro.

The screenshot displays a chat window for work order #CA2522, which is 'Waiting for Acceptance' and has a 'REQUEST: Request' and 'PRIORITY A' status. The chat history includes a system message 'Waiting to be sent to Customer', a file upload 'New Text Document 4 B' at 4:03 PM, and a system message 'QaEplCallcenter92su3 has reopened this work order, 6:09 PM'. A customer message at 6:09 PM provides IVR instructions: 'To check-in/check-out using the IVR, call +1855-288-0920 and enter code 943045132. Click **HERE** for additional instructions from the customer.' A subsequent message at 6:09 PM asks: 'Click to **ACCEPT** or **REJECT** WO #CA2522? Any questions? Send a message'. A final message at 6:09 PM, highlighted with a red box, states: 'This work was requested by Jon Snow (**JON.SNOW@TEST.COM**) Click to update **APPOINTMENT INFO**'. A system message at the bottom of the chat confirms: 'Contact information has been updated, 6:09 PM'. The chat interface includes a sidebar with 'INTERNAL NOTE', 'WO DETAILS', and 'CRUCHAT' tabs, and a bottom input area with a dropdown menu set to 'All', a text input field, and a 'SEND' button.

Open WO from Invoice page



A WO Number in the invoice dialog is now a link for quick access to the work order in the CorrigoPro.

Invoice for Work Order **#CA2522** PENDING WO COMPLETION

CUSTOMER QaEplCallcenter92su3
LAST UPDATE DATE 3/17/2020
NTE \$1,000.00 USD
TIME ON SITE --

INVOICE DATE
INVOICE # **USE WO#**

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

DISCOUNT **TAX**
TOTAL \$0.00 USD

WORK ORDER COMPLETION DETAILS

ATTACHMENTS

ACTION HISTORY

RESET

Open Invoice from WO table view



The Invoice number column of the WO Table has a quick access link to open a related Invoice.

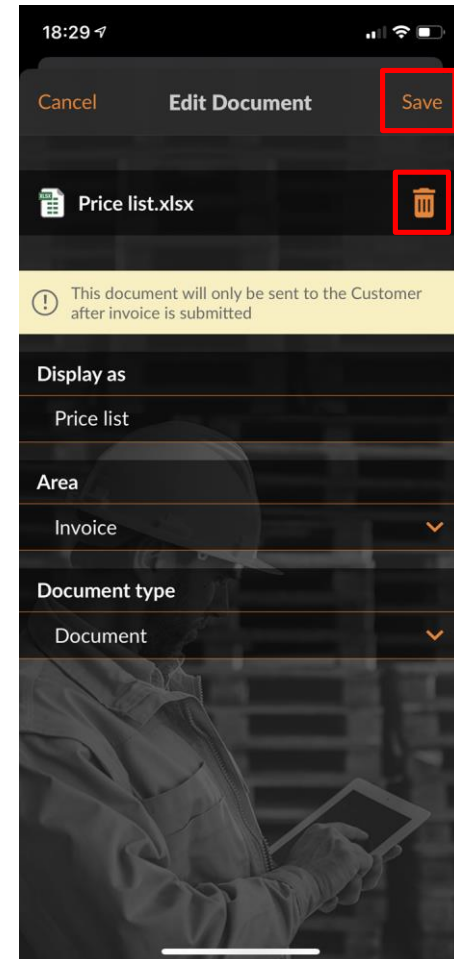
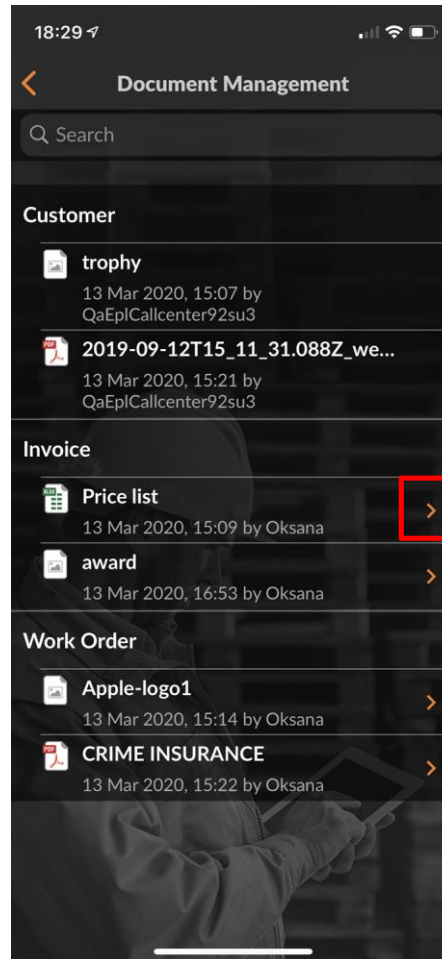
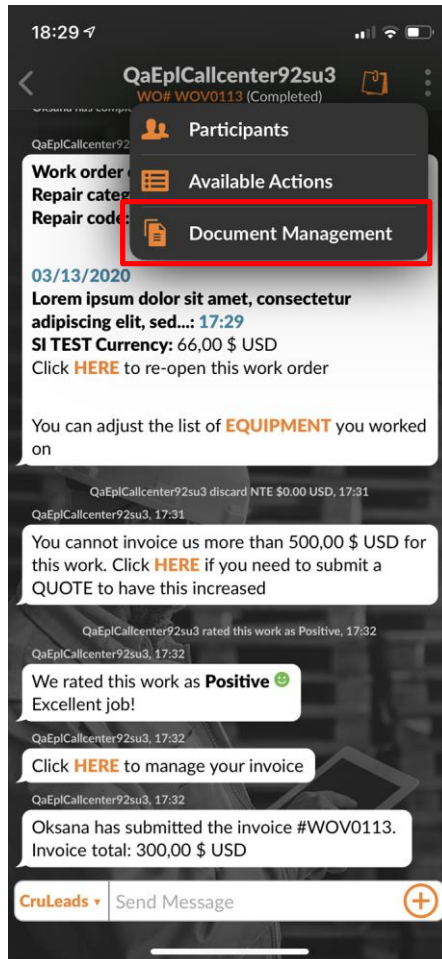
Q Search Chats STATUS: Any ▼ WO STATE: Any ▼ COMPLETE BY: Any ▼ DEFAULT* ▼ ☰

☐	WO NUMBER	PRIORITY	INVOICE NU...	CUSTOMER	NTE	SERVICE LOCATION	PROBLEM
☐	CA2308	Priority A	CA2308	QaEplCallcenter92s...	\$400.00 USD	Protasiv Yar St, 2, Kyiv, 02000, Kyiv, 02000, UA	• Asset: Electro-F Task: Need parts Details: sdfg
☐	CA2259	Priority A		QaEplCallcenter92s...	\$0.00 USD	Protasiv Yar St, 2, Kyiv, 02000, Kyiv, 02000, UA	• Asset: Doors Task: Hinges loo Details:
☐	CA2406	Priority B/C		QaEplCallcenter92s...	\$0.00 USD	Protasiv Yar St, 2, Kyiv, 02000, Kyiv, 02000, UA	• Asset: Fire Extin Task: Due for Ins Details:
☐	CA1967	Priority A	CA1967	QaEplCallcenter92s...	\$12.00 USD	Protasiv Yar St, 2, Kyiv fdgffdfgdgd, gfhghgfhfghg, fghfghfghfgh, fghfh 02000, UA	• Asset: Fire Syste Task: Discharger Details:
☐	53490269	Priority A		QaEplCallcenter92s... Visits	\$0.00 USD	Novovokzalna St, 3, Kyiv, Kyiv, 02000, UA	• Asset: BUILDIN Task: Other: Details:

Document Management – Mobile App




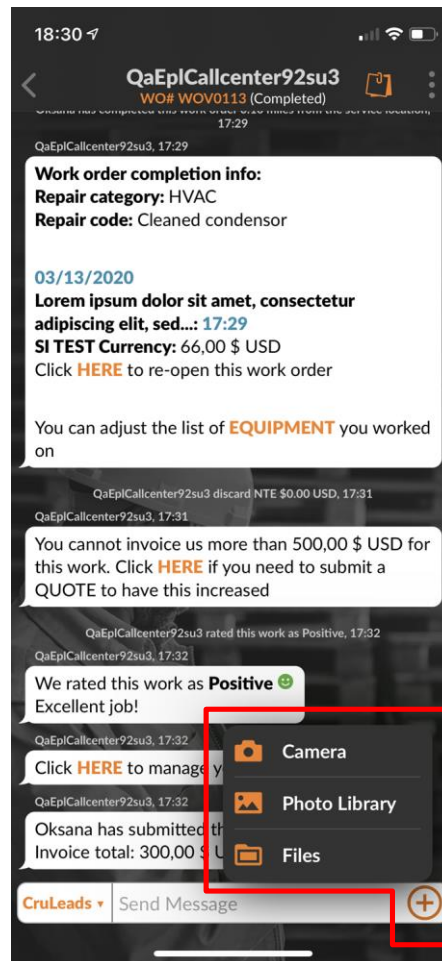
WO and Invoice document management is available via CorrigoPro Mobile application



Document Management – Mobile App



Attachments can be uploaded using  button displayed in the message box. Typing anything into message box will change the button to a 'Send'.



Other Changes

- WO and Invoice Document Management will be available in CorrigoPro Direct
- Introduce new colors to the pie chart on the CorrigoPro Dashboard to attract user's attention to WOs that require action