



**CORRIGOPRO**

CorrigoPro v5.3  
Release Highlights

# Multi-tax invoices

- Introducing functionality allowing multiple taxes to be added an invoice from a predefined list.
- This functionality is applicable only for countries which have multiple rates of Sales tax (VAT) depending on service type, your legal entity, customer agreement details etc.
- Customer can also disable this functionality if they will calculate taxes outside of Corrigo platform.

**Invoice for WO# NL0007** PENDING VERIFICATION

The list of available taxes will depend on which invoice items you select. It will be updated every time you add items to the invoice. We recommend adding taxes after all other invoice items have been added

**CUSTOMER** Crazy Raccoon

**LAST UPDATE DATE** 5/15/2020 **INVOICE DATE** 5/15/2020

**NTE** €1,000.00 EUR **INVOICE #** NL0007 **USE WO#**

**TIME ON SITE** -- **VIEW**

**INVOICE BY** 5/17/2020 1:00 AM

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT	
ON De-Ice Private ...	De-Ice Private ...	1.00	€60.0000	€60.00	
ON Partial De-Ice Lot	Partial De-Ice Lot	1.00	€100.0000	€100.00	
(TAX) NL 21%	EMEA-NLSTD	1.00	€35.0000	€35.00	
(TAX) NL 6%	EMEA-NLRED	1.00	€12.0000	€12.00	
Please select		1.00	€0.0000	€0.00	

**DISCOUNT**

**TOTAL TAX** €47.00 EUR  
**TOTAL** €207.00 EUR

# Multi-tax invoices – Dynamic tax list



- The list of available taxes is dynamic.
- It depends on price list items already added to an invoice.
- Taxes can only be added related to items. That is why all taxes are disabled initially and are becoming enabled as you are adding price list items to the invoice.

**We recommend to add taxes into the invoice after all other price list items are added.**

Invoice for WO# NL0007 DRAFT

**Warning:** The list of available taxes will depend on which invoice items you select. It will be updated every time you add items to the invoice. We recommend adding taxes after all other invoice items have been added.

CUSTOMER Crazy Raccoon  
LAST UPDATE DATE 5/15/2020 INVOICE DATE 5/15/2020  
NTE €1,000.00 EUR INVOICE # NL0007 USE WO#  
TIME ON SITE -- VIEW  
INVOICE BY 5/17/2020 1:00 AM

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

Q

- ON De-Ice Lot
- ON De-Ice Private Walks
- ON De-Ice Public Walks
- ON Partial De-Ice Lot
- ON Snow Plow 2"-4"
- ON Snow Plow 6"-10"
- (TAX) NL 6% EMEA-NLRED
- (TAX) NL 6% EMEA-NLREDNR
- (TAX) NL 21%
- (TAX) NL 0%

**Submit**

Invoice for WO# NL0007 DRAFT

**Warning:** The list of available taxes will depend on which invoice items you select. It will be updated every time you add items to the invoice. We recommend adding taxes after all other invoice items have been added.

CUSTOMER Crazy Raccoon  
LAST UPDATE DATE 5/15/2020 INVOICE DATE 5/15/2020  
NTE €1,000.00 EUR INVOICE # NL0007 USE WO#  
TIME ON SITE -- VIEW  
INVOICE BY 5/17/2020 1:00 AM

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
ON De-Ice Lot	De-Ice Lot	1.00	€50.0000	€50.00
ON De-Ice Private ...	De-Ice Private ...	1.00	€60.0000	€60.00
Please select		1.00	€0.0000	€0.00

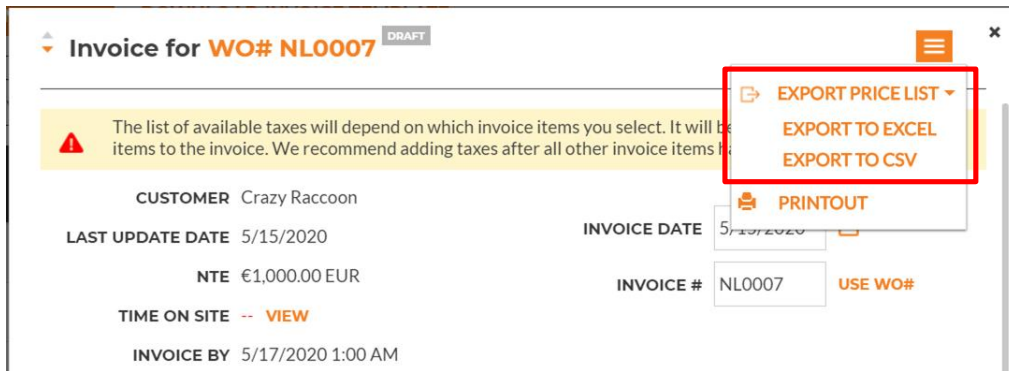
Q

- ON De-Ice Private Walks
- ON De-Ice Public Walks
- ON Partial De-Ice Lot
- ON Snow Plow 2"-4"
- ON Snow Plow 6"-10"
- (TAX) NL 6% EMEA-NLRED
- (TAX) NL 6% EMEA-NLREDNR
- (TAX) NL 21%
- (TAX) NL 0%

**Submit**

# Multi-tax invoices – Price list export

- Using the price list export, you can check which taxes are applicable to which price list item
- The price list now contains taxes related to every price list item.



	A	B	C	D	E	F
1	<b>WO #</b>	NL0007				
2	<b>Customer</b>	Crazy Raccoon				
3						
4	<b>Price List Item</b>	<b>Rate</b>	<b>Currency</b>	<b>Fixed</b>	<b>Description</b>	<b>Tax</b>
5	ON De-Ice Lot	€50.00	EUR		De-Ice Lot	(TAX) NL 6% -- EMEA-NLREDNR
6	ON De-Ice Private Walks	€60.00	EUR		De-Ice Private Walks	(TAX) NL 21%
7	ON De-Ice Public Walks	€70.00	EUR		De-Ice Public Walks	(TAX) NL 0%
8	ON Partial De-Ice Lot	€100.00	EUR		Partial De-Ice Lot	(TAX) NL 6% -- EMEA-NLRED
9	ON Snow Plow 2"-4"	€55.00	EUR		Snow Plow 2"-4"	(TAX) NL 21%
10	ON Snow Plow 6"-10"	€75.00	EUR		Snow Plow 6"-10"	(TAX) NL 6% -- EMEA-NLREDNR
11	(TAX) NL 6%	€0.00	EUR		EMEA-NLRED	
12	(TAX) NL 6%	€0.00	EUR		EMEA-NLREDNR	
13	(TAX) NL 21%	€0.00	EUR		EMEA-NLSTD	
14	(TAX) NL 0%	€0.00	EUR		EMEA-NLZERO	

# Multi-tax invoices – Calculate tax action

- Using “Calculate tax” action to calculate taxes correctly.
- You will see calculation results after it is done.
- All taxes present in the invoice will be replaced with calculated taxes if changes are “Apply”.

**Note that this action is available in all invoices (except Canadian) now if your customer has enabled tax calculation and validation functionality.**

Invoice for **WO# NL0007** DRAFT

**Warning:** The list of available taxes will depend on which invoice items you select. It will be updated every time you add items to the invoice. We recommend adding taxes after all other invoice items have been added

**CUSTOMER** Crazy Raccoon  
**LAST UPDATE DATE** 5/15/2020  
**NTE** €1,000.00 EUR  
**TIME ON SITE** -- [VIEW](#)  
**INVOICE DATE** 5/15/2020  
**INVOICE #** NL0007 [USE WO#](#)  
**INVOICE BY** 5/17/2020 1:00 AM

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT	
ON De-Ice Lot	De-Ice Lot	1.00	€50.0000	€50.00	
ON De-Ice Private ...	De-Ice Private Walks	1.00	€60.0000	€60.00	
(TAX) NL 6%	EMEA-NLREDNR	1.00	€15.0000	€15.00	
(TAX) NL 21%	EMEA-NLSTD	1.00	€10.0000	€10.00	
Please select		1.00	€0.0000	€0.00	

**DISCOUNT**

**TOTAL TAX** €25.00 EUR  
**TOTAL** €135.00 EUR

**WO COMPLETION DETAILS**

**CALCULATE TAX** **RESET** **SUBMIT**

# Multi-tax invoices – Tax verification

- Tax verification of multi-tax invoices will be done by each tax.
- Error will be displayed if amount of at least one tax differs from expected.
- You can update tax amounts in the invoice manually or press “Apply” button to override existing values with values calculated by the system.

### Tax Verification Details for Invoice #NL0007

Please review the tax amounts and update as appropriate. If you believe our tax calculation is in error and your original tax amount is correct, continue to submit the invoice.

Taxes by Price List Items

CATEGORY / ITEM	DESCRIPTION	SUBTOTAL	VERIFIED TAX RATE	VERIFIED TAX SUBTOTAL
Services	De-Ice Lot	€50.00 EUR	6.00%	€3.00 EUR
Services	De-Ice Private Walks	€60.00 EUR	21.00%	€12.60 EUR

Taxes by Tax codes

CATEGORY / ITEM	DESCRIPTION	SUBTOTAL	VERIFIED TAX SUBTOTAL	SUBMITTED TAX SUBTOTAL
NL 21%	EMEA-NLSTD	€60.00 EUR	€12.60 EUR	€10.00 EUR
NL 6%	EMEA-NLREDNR	€50.00 EUR	€3.00 EUR	€15.00 EUR

VERIFIED TAX TOTAL: €15.60 EUR  
SUBMITTED TAX TOTAL: €25.00 EUR

SUBMIT ANYWAY    CLOSE    **APPLY**

# Multi-tax invoices – Other changes

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- Taxes added to the invoice will be validated on invoice import as well. You can only add taxes related to price list items present in the invoice
- Printout of multi-tax invoice will contain “Tax Summary” section with taxable amounts and tax amounts per each tax
- CorrigoPro Direct is extended to provide a list of taxes related to price list items and support tax validation of multi-tax invoices

# Custom fields sharing



- Introducing functionality allowing to view and edit custom fields shared by your customer.
- Populated fields can be viewed in a CruChat and edited in a separate window.

**Note: that some fields are editable, others are read-only depending on your customer's configuration.**

Crazy Raccoon

WO# NL0012 Open

REQUEST: Request P720

Crazy Raccoon, 5:13 PM

Click **HERE** to manage your invoice

Oksana has accepted this work order, 5:15 PM

Crazy Raccoon, 5:15 PM

Click **HERE** if you need to reject this work order

Crazy Raccoon, 5:15 PM

Indicate which pieces of **EQUIPMENT** you worked on required by the customer

Crazy Raccoon, 5:15 PM

Please **CHECK IN** when you arrive on site and start working

Crazy Raccoon, 5:26 PM

**Custom Fields:**  
PO Number: FET56324  
Store Manager: Emilia Clark

**EDIT CUSTOM FIELDS**

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

### Custom Fields | WO # NL0012

**PO NUMBER**  
FET56324  
HISTORY

**STORE MANAGER**  
Emilia Clark  
HISTORY

**SUPPLIER STATUS**  
Waiting Delivery

**DELIVERY DATE**  
5/30/2020

**DRIVER**  
Jack Watsons

**CLOSE** **SAVE**



# Custom fields sharing



- History of value changes is available for every shared custom field.
- You can open it using “History” button on the “Edit custom fields” window.

### Custom Fields | WO # NL0012

**PO NUMBER**  
FET56324  
HISTORY

**STORE MANAGER**  
Emilia Clark  
HISTORY

**SUPPLIER STATUS**  
Waiting Delivery  
HISTORY

**DELIVERY DATE**  
6/1/2020  
HISTORY

**DRIVER**  
Jack Watsons  
HISTORY

**CLOSE** **SAVE**

### Driver

DATE	USER	VALUE
5/25/2020 12:55 PM	Oksana	Jack Watsons
5/25/2020 12:54 PM	Oksana	Tom Felps
5/25/2020 12:54 PM	Oksana	Jack Watsons

**CLOSE**

# Custom fields sharing – WO Details



Populated custom fields are displayed in the WO Details.

**CrucChat** | **WO DETAILS** | **INTERNAL NOTE**

Crazy Raccoon

WO# NL0012 [Open](#)

REQUEST: Request P720

Warranty: No 1077, NL  
NTE: €372.80 EUR

**ACCOMPANYING MESSAGE**

Send Message content: Service Contact: {{Property.ContactName}} @ {{Property.Phone}} NTE: €372.80 On-Site By: 5/16/2020 4:12 PM Customer: Crazy Raccoon Netherlands Jon Snow

**WORK DESCRIPTION**

ASSET	TASK	DETAILS
Hook floor tools	INSTALL	WO CF Text Autocomplete w Pick List: WO CF Text Autocomplete w/o Pick List: ZS CF1:

**SLAs**

Accept/Reject By: 5/16/2020 1:12 AM  
On-Site By: 5/16/2020 5:12 PM  
Complete By: 5/23/2020 5:12 PM  
Invoice By:

**IVR INFO**

Phone:  
Code:  
Instructions:

**CUSTOM FIELDS | EDIT**

PO Number: FET56324 Store Manager: Emilia Clark

**WORK ORDER COMPLETION INFO**

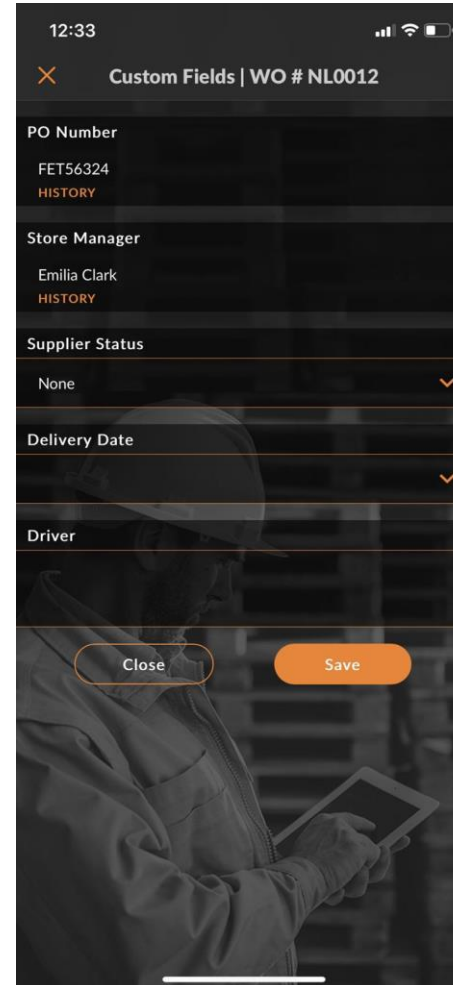
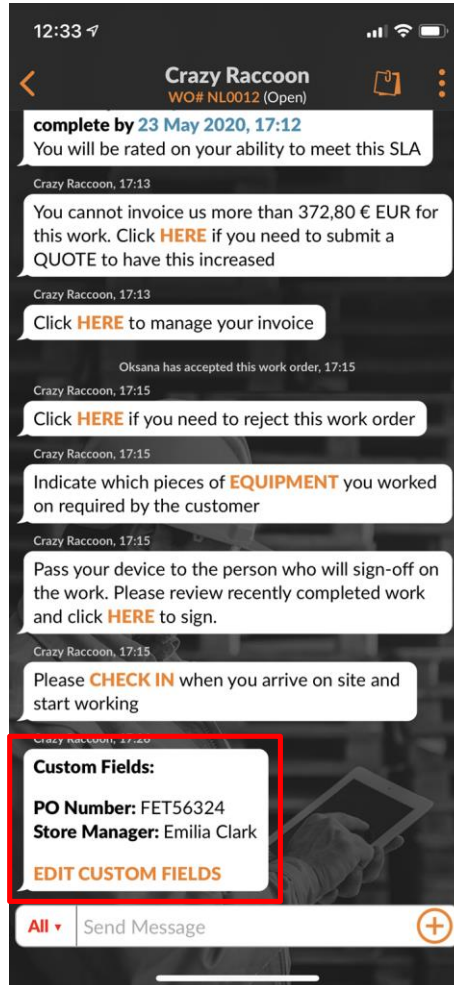
Comment:  
Repair Category:  
Repair Code:

Verification:  
Verification Notes:

# Custom fields sharing – Mobile App



Custom field editing is available via CorrigoPro Mobile application as well.



# Custom fields sharing – Other changes

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- Populated custom fields are available in WO table view and export to Excel/CSV
- Custom fields are searchable within CorrigoPro
- Custom fields sharing functionality is available also in CorrigoPro Direct

# Auto-generate invoice printout



- Some countries requires invoice printout to be attached to the invoice.
- Corrigo Pro supports such requirement by verifying this on invoice submit.
- Users can now enable the “Auto-generate invoice printout” setting, the system will automatically generate printout of the invoice and attach it during invoice submit if invoice printout attachment is initially missing.

## Settings

### ADVANCED

Auto-submit invoices with NTE set to 0 (zero) 

OFF

Auto-generate invoice printout 

ON

WO COMPLETION DETAILS 

ATTACHMENTS 

INVOICE



INVOICE NL0004 PRINTOUT | Invoice Printout

Sent on 5/15/2020 4:03 PM by ---

ACTION HISTORY 

## Other Changes

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- CorrigoPro Mobile - added a confirmation popup for check-in/out/pause when app is unable to get reliable geo coordinates
- WO export to CSV and table view are extended with 2 new columns – “Invoice By” and “Accepted” dates
- It will now be displayed if a branch is marked as a supplier by a customer. Indicator, displaying this, will be added to below a customer name on the “Our Customers” page
- WO printout is extended with rows, where you can add name of person(s), who accepted and completed WO, date of acceptance and completion date
- Performance improvements and bug fixes