



CORRIGOPRO

CorrigoPro v5.4
Release Highlights

Line Item Quotes – Concept



What is a Quote?

Quote is an estimated cost for a WO which is sent by a provider to a customer requesting an increase NTE. The customer may also create a quote on behalf of the provider.

What happens to a Quote?

CorrigoPro 5.4 introduces the option to create a detailed quote using price list items that are included on the invoice after approval.

The process is similar to invoice creation. Pro can pick price list item, add description, edit amount and rate, quote amount is calculated automatically.

There is optional general quote description as before. You need to submit a quote after you are done.

Key benefits for this feature are:

- Provider can submit detailed quotes which would eliminate the back and forth offline processes (phone calls, emails) for questions/clarifications and speed up approval
- Provider does not need to create invoices separately, it will be created from the approved quote

Line Item Quotes – Access Quote from CruChat



Quote general information can be viewed in a CruChat. It is also possible to start quote submission process in the CruChat if a quote is not submitted yet or has been rejected by a customer.

The screenshot displays the CruChat interface for work order #FULT00500205. The chat window is titled "PJ BSN" and shows a conversation with a customer. The messages are as follows:

- System message: **WO# FULT00500205** Open, **REQUEST: Request**, **URGENT (4 HR ETA)**
- Customer: **The SLA for this Urgent (4 hr ETA) priority work is: accept/reject by 7/29/2020 5:25 PM complete by 7/29/2020 9:25 PM**
You will be based on your ability to meet this SLA
- Customer: **You cannot invoice us more than \$652.00 USD for this work. SUBMIT QUOTE** if you need to have this increased
- Customer: **Click here to manage your INVOICE**
- System message: **Pria Jayaraman has accepted this work order, 1:30 PM**
- Customer: **Click here if you need to REJECT** this work order
- Customer: **Indicate which pieces of EQUIPMENT** you worked on
- Customer: **Please CHECK IN** when you arrive on site and start working

A blue arrow points to the **SUBMIT QUOTE** link in the second message. The chat window also includes a search bar, a dropdown menu, and a **SEND** button.

Line Item Quotes – Submit Quote in Invoicing app



A quote is a “draft” version of invoice, multi-line quotes are managed within Invoicing application.

New ‘Quote’ tab is added to an existing invoice details page and used to manage multi-line quotes. You will be redirected to this tab when you want to view quote details or edit details before submitting.

Quote for **WO# FULT00500244** DRAFT

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT	
Electrical & Lightin...	Electrical & Lighting Maintenance - Connecticut - 2nd Technician - Aetna Corp - OT Rate - Tax Exempt	1.00	\$112.5000	\$112.50	
Taxable Material	Taxable Material	1.00	\$0.0000	\$0.00	
Please select		1.00	\$0.0000	\$0.00	

DISCOUNT

TAX

TOTAL \$112.50 USD

DESCRIPTION

Line Item Quotes – Calculate Tax for Quote



Taxes can be added to a quote in the same way as it is done for an invoice. Use “**Calculate Tax**” button in the bottom of the quote details page or add taxes manually.

INVOICE

QUOTE

Tax Calculation Details for Quote for WO #FULT00500244 ×

 Please validate the calculated tax amounts and then press "Apply" to add them to the quote. It should be noted that already existing taxes will be replaced with the calculated ones. The changes cannot be undone after your confirmation

CATEGORY / ITEM	DESCRIPTION	SUBTOTAL	VERIFIED TAX RATE	VERIFIED TAX SUBTOTAL
Parts & Materials	Taxable Material	\$49.99 USD	6.62%	\$3.31 USD
Labor	Electrical & Lighting Maintenance - Connecticut - 2nd Technician - Aetna Corp - OT Rate - Taxable	\$112.50 USD	6.62%	\$7.45 USD
VERIFIED TAX TOTAL:				\$10.76 USD

CLOSE **APPLY**

Line Item Quotes – View Quote in Invoicing app



After a quote is submitted or approved, it can be viewed in read only mode.

Quote for WO# FULT00500244 APPROVED

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Electrical & Lightin...	Electrical & Lighting Maintenance - Connecticut - 2nd Technician - Aetna Corp - OT Rate - Tax Exempt	1.00	\$112.5000	\$112.50
Taxable Material	Taxable Material	1.00	\$49.9900	\$49.99

DISCOUNT None | TAX \$0.00 USD
TOTAL \$162.49 USD

DESCRIPTION: Any additional information on the Quote goes in here...

APPLY TO INVOICE

Line Item Quotes – Re-submit Quote in Invoicing app



A quote can be re-submitted after it is rejected. Rejection reason specified by a customer is displayed in the top of the quote details page.

Price list items marked by the customer as preventing approval is highlighted with red border.

Quote for WO# FULT00500244 REJECTED

The list of highlighted items which are blocking approval:

- Labor - Electrical & Lighting Maintenance - Connecticut - 2nd Technician - Aetna Corp

Please decrease labor rate - it is too high.

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT	
Electrical & Lightin...	Electrical & Lighting Maintena...	1.00	\$112.5000	\$112.50	
Taxable Material	Taxable Material	1.00	\$49.9900	\$49.99	
Please select		1.00	\$0.0000	\$0.00	

DISCOUNT:

TAX:

TOTAL: \$162.49 USD

DESCRIPTION:

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

Line Item Quotes – Create Invoice from Quote



An invoice will be created from a quote:

- **Automatically** – when the quote is approved, but only if the invoice has not been edited before and the invoice does not have default invoice items (the last condition is only applicable for PM/RM WOs)
- **Manually** – when clicking on ‘Apply to Invoice’ action from the quote details page to overwrite current invoice content with quote line items. See next slide for details.

Line Item Quotes – Apply to Invoice



Pressing “**Apply to Invoice**” button will override existing line items in an invoice with line items from quote as they are seen on the screen.

The action is available only if the quote is approved or waiting for approval and before the invoice submitted or if an invoice has been disputed.

Quote for WO# FULT00500244 APPROVED

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Electrical & Lightin...	Electrical & Lighting Maintenance - Connecticut - 2nd Technician - Aetna Corp - OT Rate - Tax Exempt	1.00	\$112.5000	\$112.50
Taxable Material	Taxable Material	1.00	\$49.9900	\$49.99

DISCOUNT None | TAX \$0.00 USD
TOTAL \$162.49 USD

DESCRIPTION

APPLY TO INVOICE

Apply to invoice

This action will replace existing line items in Invoice with Quote line items. This action cannot be undone

CANCEL **PROCEED**

Exempt

Taxable Material	Taxable Material	1.00	\$49.9900	\$49.99
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DISCOUNT None | TAX \$0.00 USD
TOTAL \$162.49 USD

DESCRIPTION

APPLY TO INVOICE

Line Item Quotes – WO Details

Quote amount is displayed in the WO Details tab as before. Press “**View**” button to see quote details.

PJ BSN

WO# FULT00500247

Waiting for Accept...

✕

BASIC: Basic

SCHEDULED

☰

DETAILS	SERVICE LOCATION
Contact: Warranty: No NTE: \$1,281.48 USD Quote: \$1,281.48 USD VIEW	Space: Allentown Address: 20 N Main St, Allentown, NJ 08501-1687, US

ACCOMPANYING MESSAGE

NTE: \$141.00 (NTE amount is inclusive of taxes) Property: Allentown Property Phone: (000) 000-5854 Priority: Scheduled - Please schedule technician arrival within the listed ETA. On Site By:: Work Completion Due By: 9/9/2020 10:00 AM Expanded Work Description: Landscaping/Grounds:Snow/Ice Management - RMs:Recurring; Monthly Snow and Ice Management Services. 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 Building Services Network Service Center at (470) 480-5748. 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
Landscaping/Grounds	Snow/Ice Management - RMs	Recurring; Monthly Snow and Ice Management Services.

SLAs	IVR INFO
Accept/Reject By: 9/9/2020 5:00 PM On-Site By:	Phone: Code:

CRUCHAT
WO DETAILS
INTERNAL NOTE

Line Item Quotes – Allow quotes



This feature allows quotes to be submitted if a customer has enabled appropriate setting. When it is disabled, the following message appears on quote submission attempt.

Quote for **WO# FULT00500244** DRAFT

⚠ This customer does not allow you to submit Quotes.

CATEGORY / ITEM	DESCRIPTION	QTY	RATE	AMOUNT	
Electrical & Lightin...	Electrical & Lighting Maintenance - Connecticut - 2nd Technician - Aetna Corp - OT Rate - Tax Exempt	1.00	\$112.5000	\$112.50	
Taxable Material	Taxable Material	1.00	\$49.9900	\$49.99	
Please select		1.00	\$0.0000	\$0.00	

DISCOUNT

TAX

TOTAL \$162.49 USD

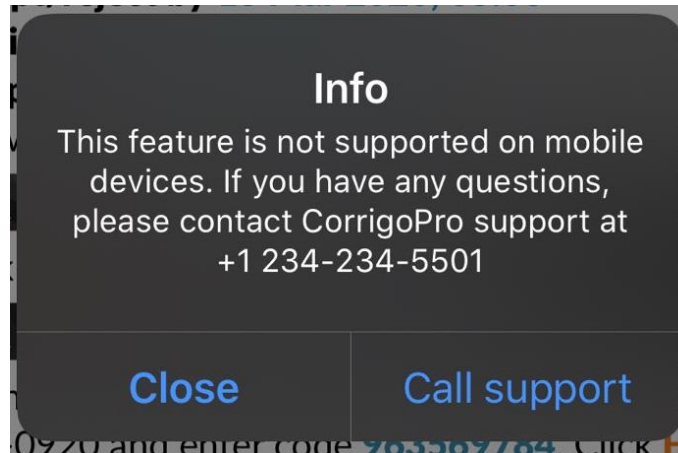
DESCRIPTION

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

Line Item Quotes – Mobile App



Line-item quotes are not available via CorrigoPro Mobile application. When a user tries to submit or view a multi-line quote from Mobile App, the following warning is displayed:



However, single value quote is still supported and should work with no changes.

Line Item Quotes – Availability



It is possible to submit multi-line quotes only if:

- **The feature is enabled by the customer.** In this case all WOs which are received before the feature is turned on will continue work as before - with single value quotes. WOs sent while the feature is turned on will be working with multi-line quotes only.
- **Price lists are configured in the customer system.**
- **E-invoicing is enabled.** Currently, it is available only in 6 countries - USA, Canada, Australia, Great Britain, Hong Kong, Singapore.

Otherwise, quotes will work in the same way as before.

Line Item Quotes – Other changes



- Invoice details page is extended with reference to quote. Pros can switch between quote and invoice using vertically oriented tabs on the left
- Introduced printout template for quote
- Export Price List feature works for quote in same manner as for invoice
- Provider will be prevented from submitting non-zero tax as a part of quote or invoice if it is tax exempt

“Re-opened WO” Email Alert




“Re-opened WO” email notification will now be available for CorrigoPro users. The email will be sent when a WO is re-opened by a customer and will contain WO details and reopen reason.





Branch alerts

Oksana Additional Company


Recipient	New Reactive WOs	New PM/RM WOs	New Visit WOs	Reopened WOs	Unread CruChats	Quote Approval/Rejection
Oksana oksana.shevchuk+u1@globallogic.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The P720 work order #NL0076 has been re-opened

 alerts@ampro.qa.corrigo.com
To oksana.shevchuk+u56@globallogic.com

6:00 PM

 If there are problems with how this message is displayed, click here to view it in a web browser.

The work order #NL0076 has been re-opened due to the following reason:
I have a problem again!!! In 2 days after you fix it.

CORRIGOPRO



Oksana New Company!
758 Ruckman Road, Oklahoma City, OK 73102, US
073 210 7449
For Crazy Raccoon
Fax this back to (800) 780-7191

Other Changes in this release

- CorrigoPro application is now available in 13 new countries: Denmark, Qatar, Czech Republic, Hungary, Slovakia, Kenya, Pakistan, Kuwait, Finland, Morocco, Serbia, Nigeria, Monaco
- Added a confirmation popup for check-in/out/pause to web application when it's unable to get reliable geo coordinates
- Clicking on the announcement widget on the CorrigoPro Desktop will redirect you to the CorrigoPro Support Center
- Messages with WO actions in CruChats are redesigned. You now will have to click on a particular action name to initiate it instead of more general "Click here"
- Bug fixes and performance improvements