

Quick Reference Guide

The purpose of this document is to cover the CorrigoPro Desktop Homepage and inform Service Providers of the purpose for each tile and how to navigate the CorrigoPro Desktop Homepage.

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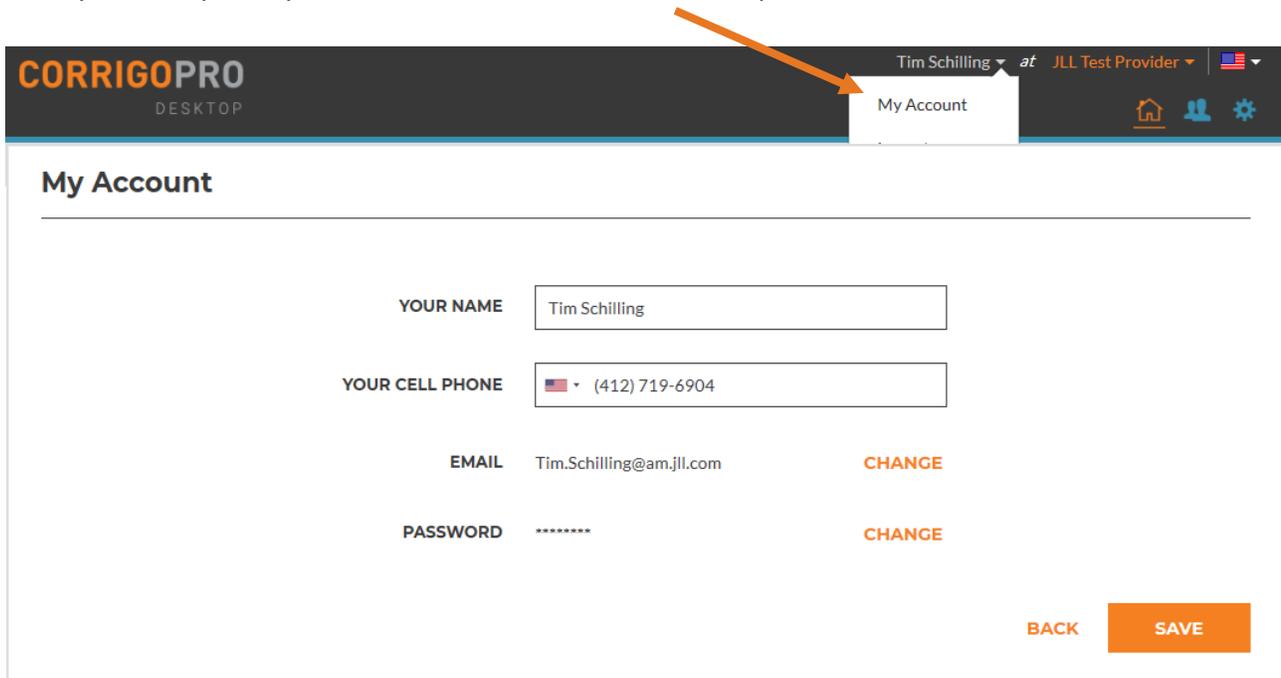
Manage your CorrigoPro Desktop Homepage

Login to CorrigoPro Desktop

1. Go to <https://www.corrigopro.com> within your web browser.
2. Next select the appropriate country flag to be directed to the login page for your region.
3. Enter the email address and password you used to register for CorrigoPro then click “Login”.
4. If needed, you can click the “Forgot Your Password” link for assistance resetting your password.

Updating User Information

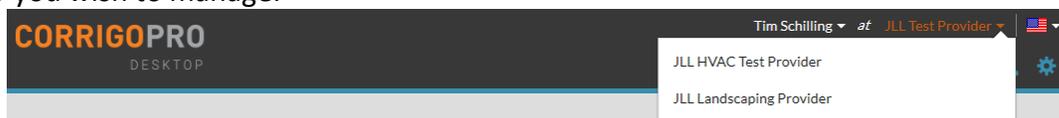
Click on the drop-down arrow next to your name at the top of the screen and select My Account. Here you can update your name, contact information and password.



Note – We advise against changing “Your Name” to another user’s name. Your “Cru” name will not update. If you need to setup an additional user or replacement user, please follow steps in the “Manage your Team within CorrigoPro” reference document

Switching Between CorrigoPro Accounts

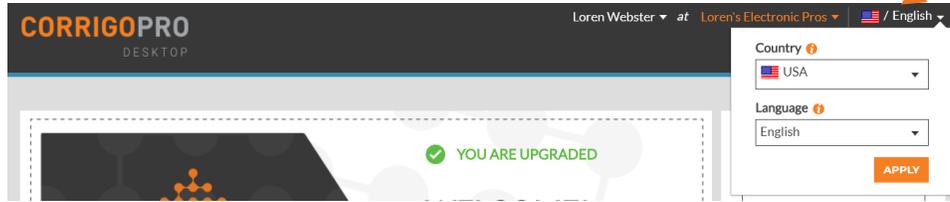
Click on the Service Provider name at the top of the page, then select the name of the Service Provider you wish to manage.



Note – You will only have this option if you are a user on more than one CorrigoPro account

Changing the Language

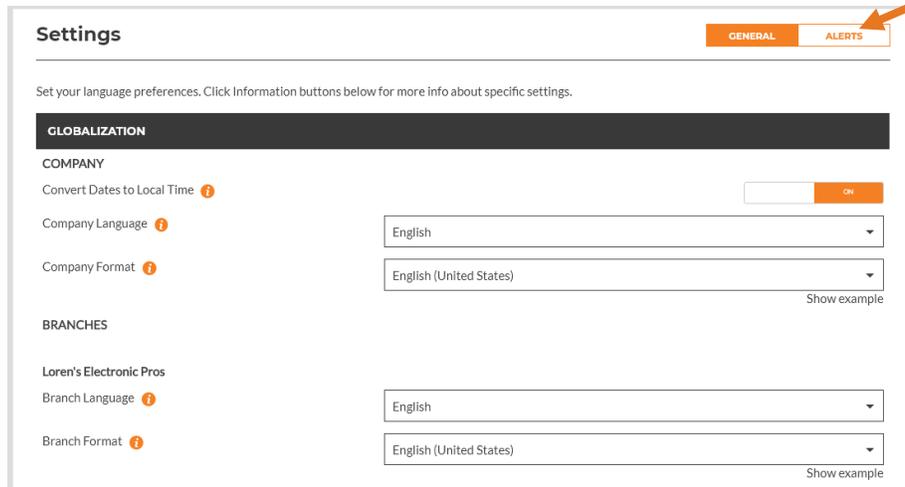
Click the flag/language icon in the top right corner of the screen to update your country and language preference while using CorrigoPro.



Settings & Email Notifications for Administrator Users

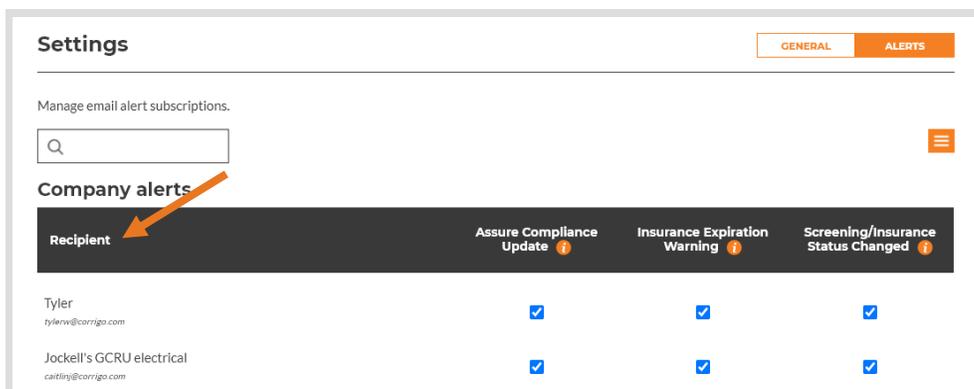
Administrators can set language preferences and email notification alerts for all desktop users

1. Click on the  icon from the top right corner of the desktop screen
2. You will be brought to the “General” tab to make changes to language preferences for your company and branches.
3. Click the “Alerts” tab to make changes to user email alerts



“Company alerts” are used for Providers enrolled in the Corrigo Assure program.

Note - Service Providers not enrolled in Corrigo Assure can leave these disabled



“Branch alerts” will be used for work order, invoicing and SLA alerts. You can also modify alerts for multiple branches. You can use the scroll bar at the top or bottom of the section to view all alerts. To enable alerts, click to “check” the box next to the user(s) to receive the email notification. To disable a notification, simply “uncheck” the box for the user.

Branch alerts

Loren's Electronic Pros

Recipient	New Reactive WOs	New PM/RM WOs	New Visit WOs	Unread CruChats	Quote Approval/Rejection	WO Recall
AtI Office iPhone <i>test2+test2@corrigo.com</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brandon <i>lwebster1985@gmail.com</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Jockell's GCRU electrical <i>caitling@corrigo.com</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Additional alerts options can be found within the  menu. You can subscribe, unsubscribe recipients for alerts and edit Advanced Alert Settings based on Service Level Agreement (SLA).

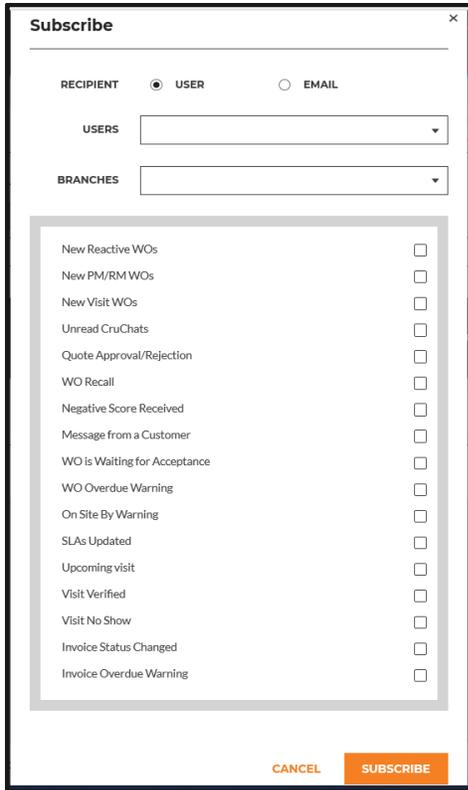
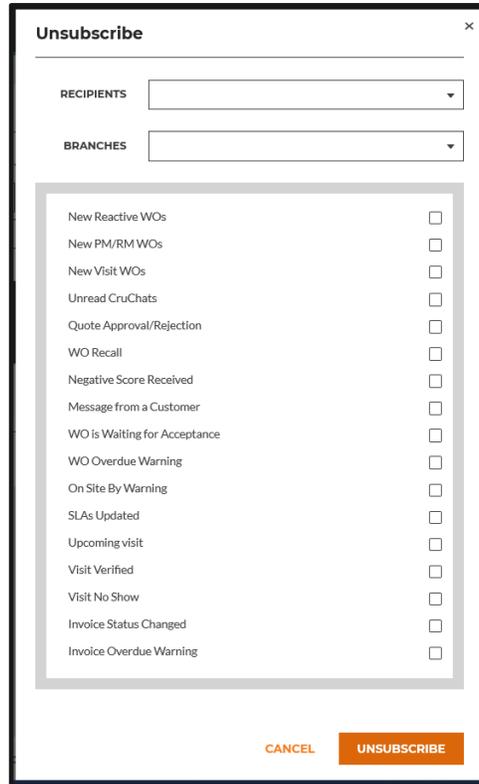
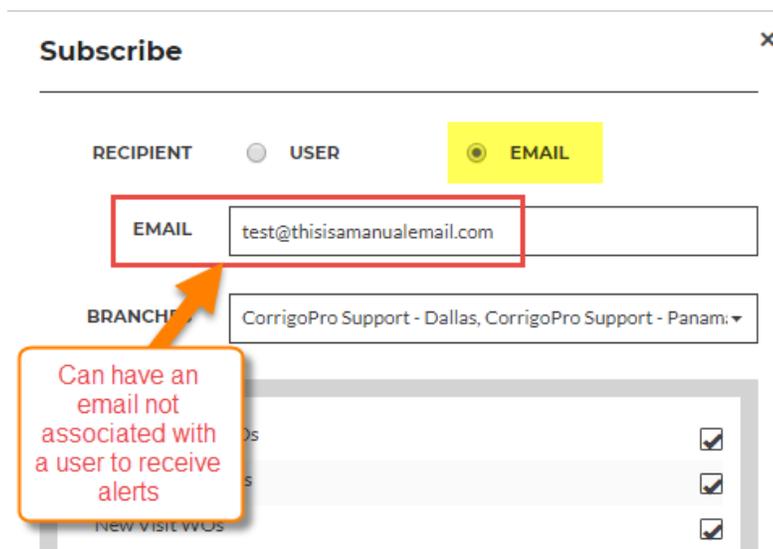
Settings

Manage email alert subscriptions.

Company alerts

Recipient	Assure Compliance Update	Insurance Expiration Warning
Tyler	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Within the “Subscribe” and “Unsubscribe” menus, you can click to select multiple branches & users to apply alert notifications to. You can also add alerts to other email addresses not associated with CorrigoPro.

Advanced Alerts settings will allow you to set how far in advance to receive email notifications for SLA's. The following are email alerts driven by SLA:

- WO is Waiting for Acceptance
- WO Overdue Warning
- On Site By Warning
- Invoice Overdue Warning

Advanced Alert Settings ×

Accept/Reject By SLA	12	hours	0	minutes in advance
Complete By SLA	48	hours	0	minutes in advance
On-Site By SLA	24	hours	0	minutes in advance
Upcoming visit	24	hours	0	minutes in advance
Invoice By SLA	48	hours	0	minutes in advance

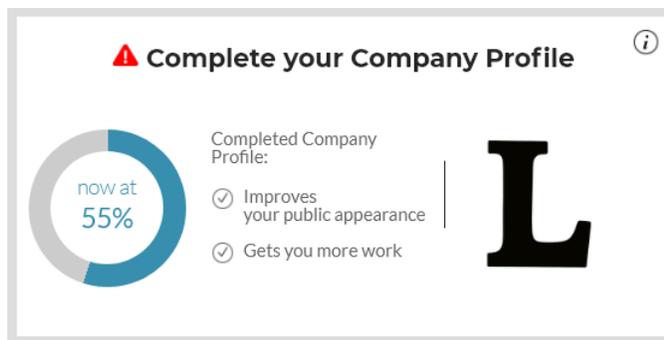
CANCEL
SAVE

Marketing Tile



The Marketing Tile is used to notify Providers of updates from the Corrigo Marketing team. It can contain information about recent product updates and announcements from Corrigo. You can click within the tile to access specific details.

Company Profile Tile



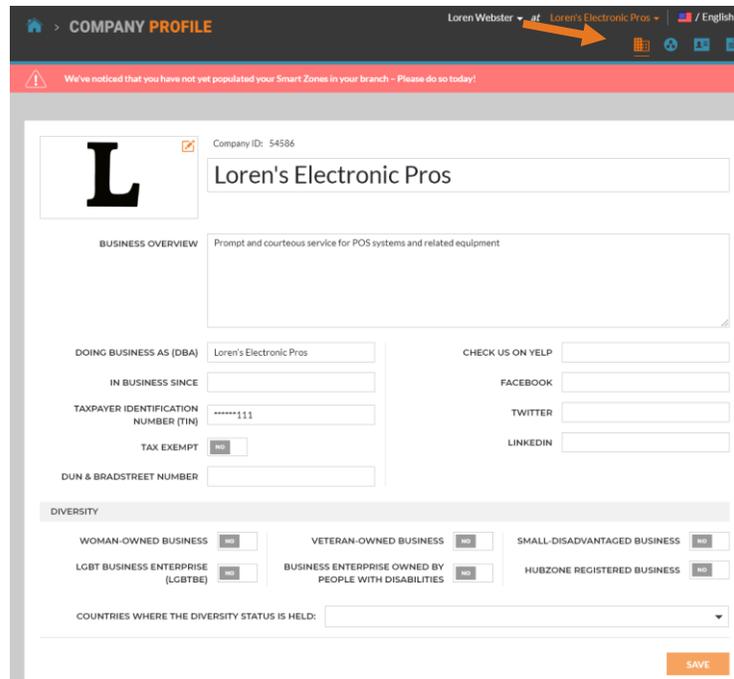
The Company Profile tile is used to maintain your company identity within the CorrigoPro Network. You can also add details to allow your business to stand out to Customers within the CorrigoPro Network.

Note – You will see a % indicator within the tile. This percentage does not affect your ability to receive work orders from your connected customers.

General Icon

This allows you to add and maintain details listed below. Details listed below will be visible to Customers within the CorrigoPro Network. Additional details will be shared and visible in the future.

- Company Logo
- Company Name
- Business Overview
- Doing Business As (DBA)
- Taxpayer ID Number – only visible to connected Customers
- Diversity Attributes for your business



The screenshot shows the 'COMPANY PROFILE' page for 'Loren's Electronic Pros'. The form includes the following sections and fields:

- Company Logo:** A large letter 'L' icon.
- Company Name:** Loren's Electronic Pros
- BUSINESS OVERVIEW:** Prompt and courteous service for POS systems and related equipment
- DOING BUSINESS AS (DBA):** Loren's Electronic Pros
- TAXPAYER IDENTIFICATION NUMBER (TIN):** *****111
- TAX EXEMPT:** NO
- DUN & BRADSTREET NUMBER:** [Empty field]
- CHECK US ON YELP:** [Empty field]
- FACEBOOK:** [Empty field]
- TWITTER:** [Empty field]
- LINKEDIN:** [Empty field]
- DIVERSITY:**
 - WOMAN-OWNED BUSINESS: NO
 - VETERAN-OWNED BUSINESS: NO
 - SMALL-DISADVANTAGED BUSINESS: NO
 - LGBT BUSINESS ENTERPRISE (LGBTBE): NO
 - BUSINESS ENTERPRISE OWNED BY PEOPLE WITH DISABILITIES: NO
 - HUBZONE REGISTERED BUSINESS: NO
- COUNTRIES WHERE THE DIVERSITY STATUS IS HELD:** [Dropdown menu]
- SAVE:** [Orange button]

Click "Save" to update any changes made.

Branches Icon

This allows you to add and maintain additional company details. Details listed below will be visible to Customers within the CorrigoPro network. Additional details will be shared and visible in the future.

- Company Name
- Address
- Email
- Phone Number

- Services
- Smart Zones

BRANCH ID 56386

NAME: Loren's Electronic Pros

ADDRESS: 1111 Alderman Dr, Alpharetta, GA, US, 30005

WEB SITE: www.lelectronicpros.com

EMAIL: lorenw@corrigo.com

PHONE: (404) 692-4299

FREE ESTIMATES: NO

PREFERRED CURRENCY: USD

NUMBER OF TECHS: <Not Selected>

SERVICES: Electrical, Alarm Systems, Beverage Systems, Disaster Recovery, IT/POS Systems, Appliances, Environmental Consulting, Communications, A/V Services

WORK HOURS: Sun Closed, Mon Open 8:00 PM - 5:00 PM, Tue Closed, Wed Closed, Thu Closed, Fri Closed, Sat Closed

SMART ZONES: Greater Huntsville, AL Area; Brown County, TX; Aragon, NM 87820; Datil, NM 87821; Pie Town, NM 87827; Quemado, NM 87829; Re...

Click the “Services” menu to display a list of available services. You can select as many services as you would like but only select services applicable to your company. The services you select will be visible to Customer searching for providers within the CorrigoPro network.

SERVICES

Electrical, Alarm Systems, Beverage Systems, Disaster Recovery, IT/POS Systems, Appliances, Environmental Consulting, Communications, A/V Services

A/V Services

Alarm Systems

Appliances

Architecture

Awning

Beverage Systems

“Smart Zones” are pre-defined geographical areas in which your company will be visible for dispatches within the CorrigoPro Network. Be sure to only select Smart Zones matching your areas of service. To edit your Smart Zones, follow the steps below.

1. Click the “Edit” icon

SMART ZONES Greater Huntsville, AL Area; Brown County, TX; Aragon, NM 87820; Datil, NM 87821; Pie Town, NM 87827; Quemado, NM 87829; Re...

2. Click “Next” on the “Selecting Your Corrigo Smart Zones” page.

Selecting Your Corrigo Smart Zones

Selecting your Corrigo Smart Zones is simple – just follow the steps below to select your primary zone and any additional zones you need to match your coverage area.

Remember:

- Your primary Smart Zone (service area) is included in your subscription.
- In countries with multiple smart zones, each zone can be customized to the county or city level to match your service area.

BACK NEXT

- You can select your Smart Zone by clicking the checkbox next to it. Smart Zones can also be filtered down to specific counties/townships and city levels.
- Click “I Agree” to update your selections.

Set-Up Smart Zones

Country: USA

Search: []

- Greater Albuquerque, NM Area
- Greater Altoona, PA Area
- Greater Amarillo, TX Area
 - Armstrong, TX
 - Claude
 - Wayside
- Beaver, OK
- Briscoe, TX
- Carson, TX
- Castro, TX
- Childress, TX
- Cimarron, OK
- Collingsworth, TX
- Cottle, TX

You selected 10 Smart Zone(s)

USA

- Greater Abilene, TX Area
- Greater Albuquerque, NM Area
- Greater Atlanta, GA Area
- Greater Austin, TX Area
- Greater Baltimore, MD Area
- Greater Charlotte, NC Area
- Greater Columbia, SC Area
- Greater Denver, CO Area
- Greater Huntsville, AL Area
- Greater San Diego, CA Area

Click the 'I Agree' button below to confirm your selection and complete your Smart Zone set-up process.

BACK I AGREE

Note – Your primary Smart Zone is included with no additional cost as a part of your CorrigoPro subscription. Each additional Smart Zone is billed at \$2.50 per zone on a monthly basis

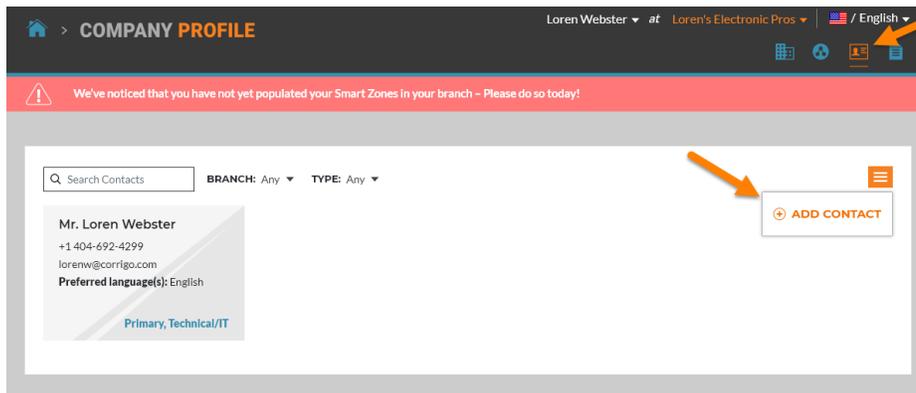
The  menu will allow you to add multiple branches within your company. Please visit “Managing Branches in CorrigoPro” within the CorrigoPro Support Center for assistance with creating and managing Branches.

Note- Some Providers will not see the “Add a branch” option. These Providers were migrated to CorrigoPro from the Worktrack system. They will need to reach out to the CorrigoPro Connection Team by email at connect@corrigo.com for assistance with creating branches

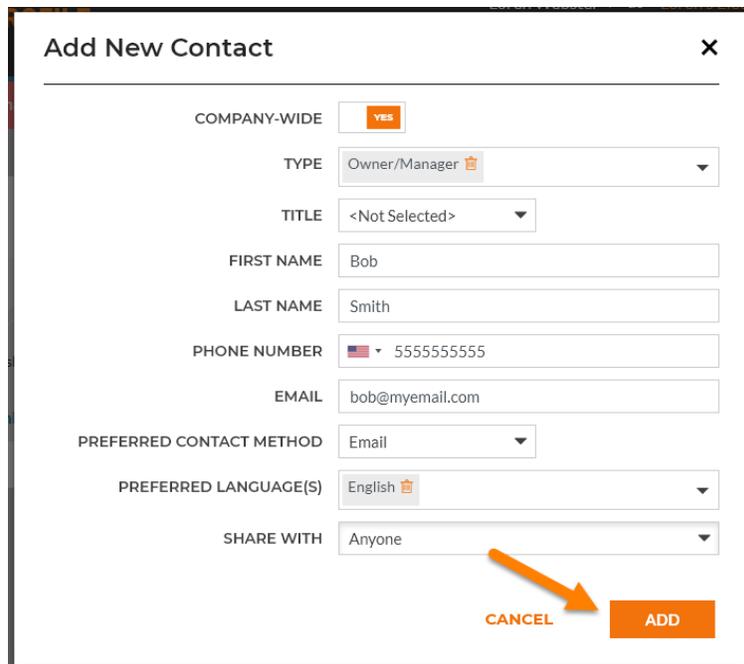
Contacts Icon

This allows you to add and manage contacts within your Company Profile. You will have the option to share these with customers in the future. To add a contact, please follow the steps below

1. Click the  menu in the top right corner of the window
2. Select “Add a Contact”



3. Enter the details for the contact you wish to create.
4. You can assign the contact to more than one branch if needed and the contact can be marked for multiple roles by selecting the “Type” category.
5. Click “Add” to finish the creation of your contact.



The 'Add New Contact' form contains the following fields and options:

- COMPANY-WIDE: YES
- TYPE: Owner/Manager
- TITLE: <Not Selected>
- FIRST NAME: Bob
- LAST NAME: Smith
- PHONE NUMBER: 5555555555
- EMAIL: bob@myemail.com
- PREFERRED CONTACT METHOD: Email
- PREFERRED LANGUAGE(S): English
- SHARE WITH: Anyone

At the bottom right, there are two buttons: 'CANCEL' and 'ADD'. An orange arrow points to the 'ADD' button.

6. If needed, you can follow steps 1 thru 5 to create additional contacts.

You can edit or delete a contact if needed by following the steps below.

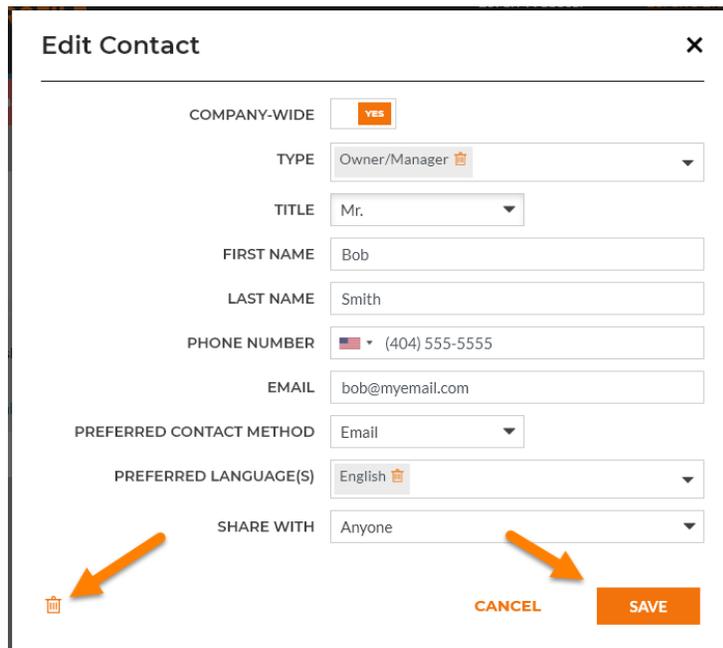
1. Click the “Edit” icon in the top left corner of the contact you wish to update.



2. Update the details for the contact.

3. Click “Save”.

4. Clicking the “Trash can” icon will delete the contact.



An "Edit Contact" form with the following fields and options:

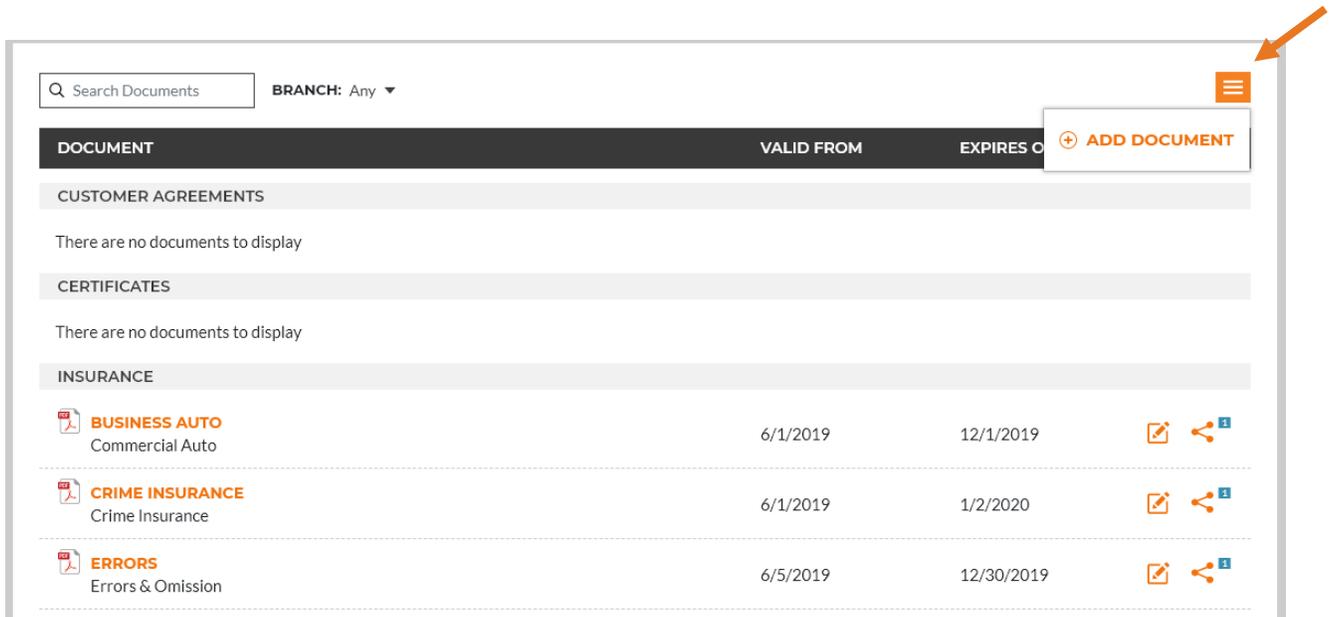
- COMPANY-WIDE: YES
- TYPE: Owner/Manager (dropdown menu)
- TITLE: Mr. (dropdown menu)
- FIRST NAME: Bob
- LAST NAME: Smith
- PHONE NUMBER: (404) 555-5555
- EMAIL: bob@myemail.com
- PREFERRED CONTACT METHOD: Email (dropdown menu)
- PREFERRED LANGUAGE(S): English (dropdown menu)
- SHARE WITH: Anyone (dropdown menu)

At the bottom of the form, there is a trash can icon on the left, a "CANCEL" button in the middle, and a "SAVE" button on the right. Orange arrows point to the trash can icon and the "SAVE" button.

Documents Icon

This allows you to add and manage documents such as Customer Agreements, Certificates, Insurance and others within CorrigoPro. You will have the option to share documents with your customers in the future. To add a document, please follow the steps below.

Note- We recommend for you to confirm whether your customer wants the document to be sent directly versus uploading to CorrigoPro.



Search Documents BRANCH: Any ▼

DOCUMENT	VALID FROM	EXPIRES ON	ADD DOCUMENT
CUSTOMER AGREEMENTS			
There are no documents to display			
CERTIFICATES			
There are no documents to display			
INSURANCE			
BUSINESS AUTO Commercial Auto	6/1/2019	12/1/2019	
CRIME INSURANCE Crime Insurance	6/1/2019	1/2/2020	
ERRORS Errors & Omission	6/5/2019	12/30/2019	

- Click the  menu
- Select “Add Document”
- Choose the category you want to add the document to
- If there are multiple branches, you can indicate whether the document is company-wide or specific to individual branch(s)
- Click the Folder icon to select the document from your computer
- Enter the document name in the “Display Document As” section
- If the document has start and expiration dates, you can enter them in the field or select the date by clicking the Calendar icon
- Select who you want the document to be shared with. You can choose not to share the document, share with only Specific Customers, all Connected Customers or with any customer within the Corrigo network
- Once you have made all your selections, click “Add” to complete

Add New Document ✕

SECTION

COMPANY-WIDE

DOCUMENT 

DISPLAY DOCUMENT AS

STARTS ON 

EXPIRES ON 

SHARE WITH

CANCEL
ADD

Once the document is listed, you can click the name to view a copy of the document or click the “Edit” icon to make any updates or changes or click the “Share” icon to update visibility preferences for the document.

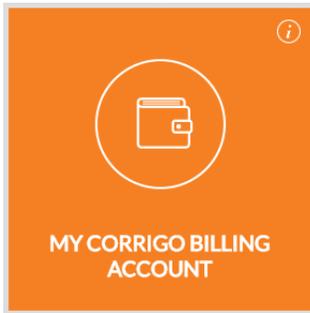
COMPANY PROFILE
Loren Webster at Loren's Electronic Pros
English

! We've noticed that you have not yet populated your Smart Zones in your branch - Please do so today!

Search Documents BRANCH: Any

DOCUMENT	VALID FROM	EXPIRES ON	
CUSTOMER AGREEMENTS			
There are no documents to display			
CERTIFICATES			
There are no documents to display			
INSURANCE			
 BUSINESS AUTO Commercial Auto	6/1/2019	12/1/2019	 
 CRIME INSURANCE Crime Insurance	6/1/2019	1/2/2020	 

My Corrigo Billing Account Tile



Within the “My Corrigo Billing Account” tile, you can manage your company’s CorrigoPro subscription details:

- Change your Membership Level
- Update the payment method on file for your subscription
- Choose if you want your monthly CorrigoPro billing invoices emailed
- Choose whether you want notifications sent when your billing credit card is to expire and needs to be updated
- You can also view your CorrigoPro billing invoices going back the last 12 months

Company Membership Details

 CONNECTED	MEMBERSHIP LEVEL	CONNECTED	VIEW / CHANGE
	PAYMENT METHOD	Credit Card	VIEW / CHANGE
	EMAIL MY INVOICES	Yes	CHANGE
	NOTIFY CREDIT CARD EXPIRATION	No	CHANGE

Billing History (last 12 months)

DATE	TOTAL
There are no billable WOs to show	

Note - If you need to update the email address that your Corrigo billing invoices are sent to or cancel your CorrigoPro account, please email probilling@corrigo.com. Cancellations can only be processed by one of the Administrators on your company’s CorrigoPro account. Please include the name of your company as it appears on your CorrigoPro account and the email address used to login to your CorrigoPro account.

Corrigo Learning Center Tile



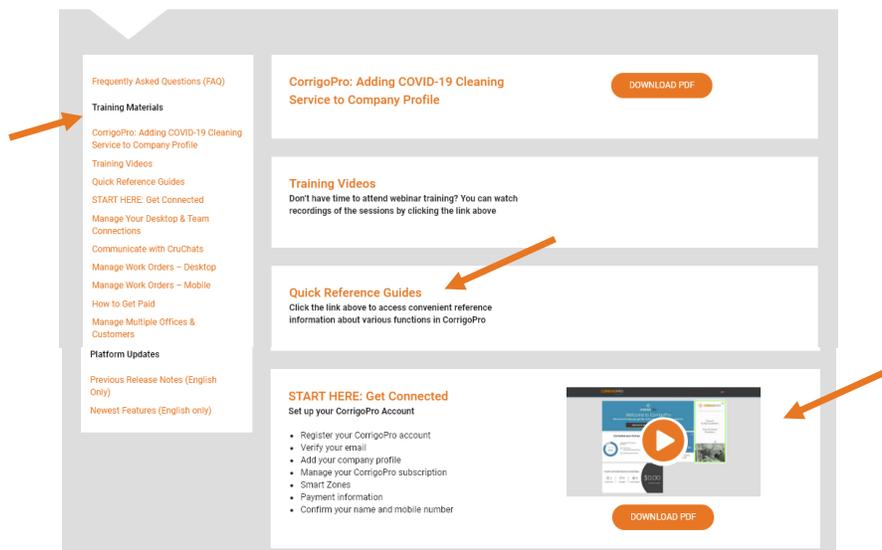
The Corrigo Learning Center is our online self-help portal for CorrigoPro. We provide helpful Tutorial, FAQ, Quick Reference guides and training videos. You can also register for upcoming online webinar training sessions to learn more about CorrigoPro.

- Click on the Support Center App on the Desktop Home Page to open a new window specific to CorrigoPro Service Provider support
- This page has self-help videos and downloadable PDF's to aid Service Providers FAQ's and help you along the way to become as proficient as possible
- There is a side bar with training material and platform updates as well as an FAQ section
- There is also a search option at the top right for service providers to try and search for a specific issue
- You can also access this site by [clicking on this link](#)



Welcome to the CorrigoPro Support Center

Learn the ins and outs of CorrigoPro by registering for online training courses and reviewing our library of tutorial videos & reference documents.



Corrigo Assure Tile



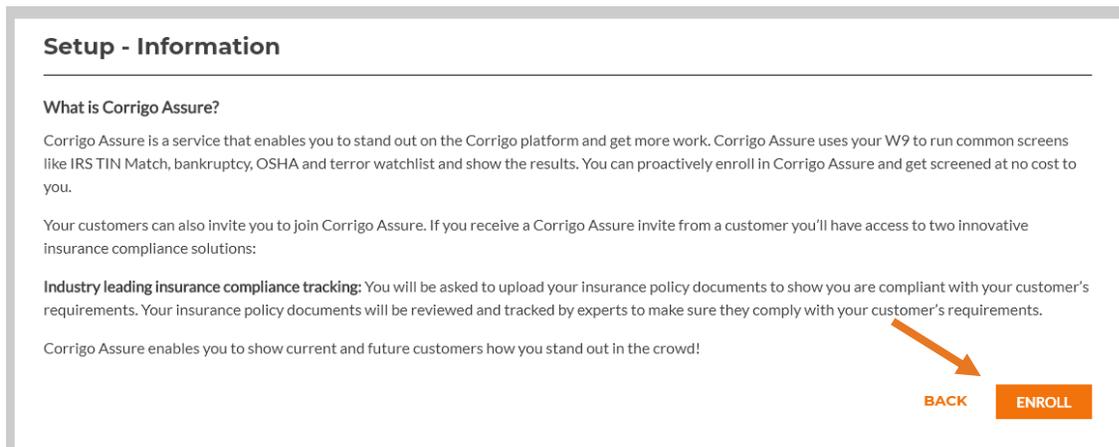
Corrigo Assure is an automated vendor screening, insurance tracking and document management solution built in to the CorrigoPro desktop. You can use the Assure functionality to be screened and labeled as Assure Complaint within the Service Provider directory which is visible to all Corrigo customers and allows you to stand out to prospective customers for work opportunities. Corrigo Assure is already included in your CorrigoPro subscription – at no additional cost to you! The screening elements include the following:

- Tax ID (TIN) & W9 Verification
- Bankruptcy screening going back to the last 5 years
- Verification from the Global Watchlist
- OSHA Inspections

Note – The Corrigo Assure program can only be used by US Service Providers/vendors at this time

To enroll in the Corrigo Assure program, please follow the following steps:

1. Click the “Corrigo Assure” tile
2. Click on “Enroll”



3. Enter the details on the “Enrollment – Company Information” page then click “Next”

Enrollment - Company Information

Please provide and review your company information

COMPANY NAME (field #1 on W-9 form)

DOING BUSINESS AS (DBA) (field #2 on W-9 form)

TAXPAYER IDENTIFICATION NUMBER (TIN)

W-9 FORM 

Your company name and TIN (Taxpayer Identification Number) will be verified against the name/TIN combination contained in the Internal Revenue Service database. The purpose of TIN Matching is to confirm your company identity, help you avoid mismatches, backup withholding notices and potential penalties to your customers.

First two lines on this form must match the information in lines 1 and 2 of your W-9.

Note – You must upload a copy of your W-9 form to complete the screening process

4. Review the company information you provided to ensure it is accurate
5. Click the checkbox “I agree to CORRIGO ASSURE TERMS OF USE” then click “Enroll”

Enrollment - Review

COMPANY NAME Loren's Restaurant Pros

DOING BUSINESS AS (DBA) Loren's Restaurant Pros

TAXPAYER IDENTIFICATION NUMBER (TIN) *****567

W-9 FORM 

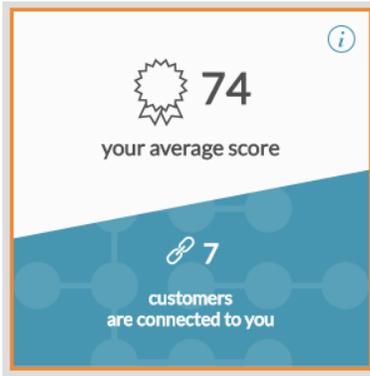
Terms Of Use

1. The following summarizes the usage of Corrigo Assure, which is a service of Corrigo Incorporated ("Corrigo") and the customer, known in this document as "you" or "your".
2. The Corrigo Assure program is governed by the **CORRIGO TERMS OF USE**.
3. You agree to provide your W9 and for that information to be used to run the following screens:
 - a. TIN match via the IRS website
 - b. OSHA violations via the OSHA website
 - c. Terror watchlist via the OFAC website
 - d. Bankruptcies via the PACER website
4. When you accept a Corrigo Assure invitation from your customer ("Customer") within the CorrigoPro Network you agree to:
 - a. Upload insurance policy documents and endorsements to show compliance to your Customer's insurance requirements. You can see those requirements in the enrollment window. Your insurance documents will be securely delivered to Corrigo's insurance vendor, Assurant, or such other vendor as Corrigo may select from time to

I agree to CORRIGO ASSURE TERMS OF USE

Once you click Enroll, the screening process will begin verifying your company information by reaching out to the appropriate resources. You will be notified within the CorrigoPro desktop of the screening progress.

Scoring Tile



The Scoring tile will display your average score with your connected Corrigo customers and show you how many customers are connected to you. By clicking on the tile, you will be able to view additional scoring details.

You will see the following details within Customer Scoring:

- Your Connected Customer(s) names
- Your Score with each customer
- Number of Completed WOs
- Amount Invoiced to date

Customer Scoring

Understand exactly how Customers are scoring you so you can work to improve your score.

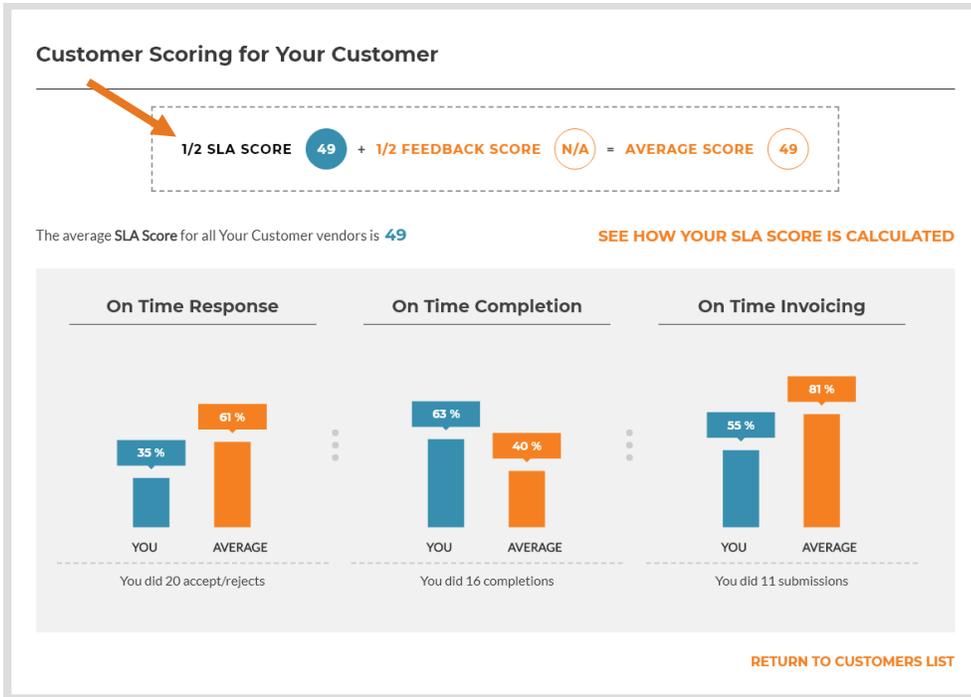
CUSTOMER NAME	SCORE	COMPLETED WOs	INVOICED TO DATE
YOUR CUSTOMER	49	237	\$28,452.87 USD
QA Requestor for CorrigoPro	100	0	No data available
STAGE BUILDING SERVICES NETWORK	N/A	6	\$759.91 USD
STAGE P&G	N/A	5	\$1,507.01 USD
LOREN REQUESTOR CUSTOMER DEMO	N/A	72	\$9,198.30 USD

Customers per page 5 ▾ Showing Customers 1 to 5 of 6 | << < 1 2 > >>

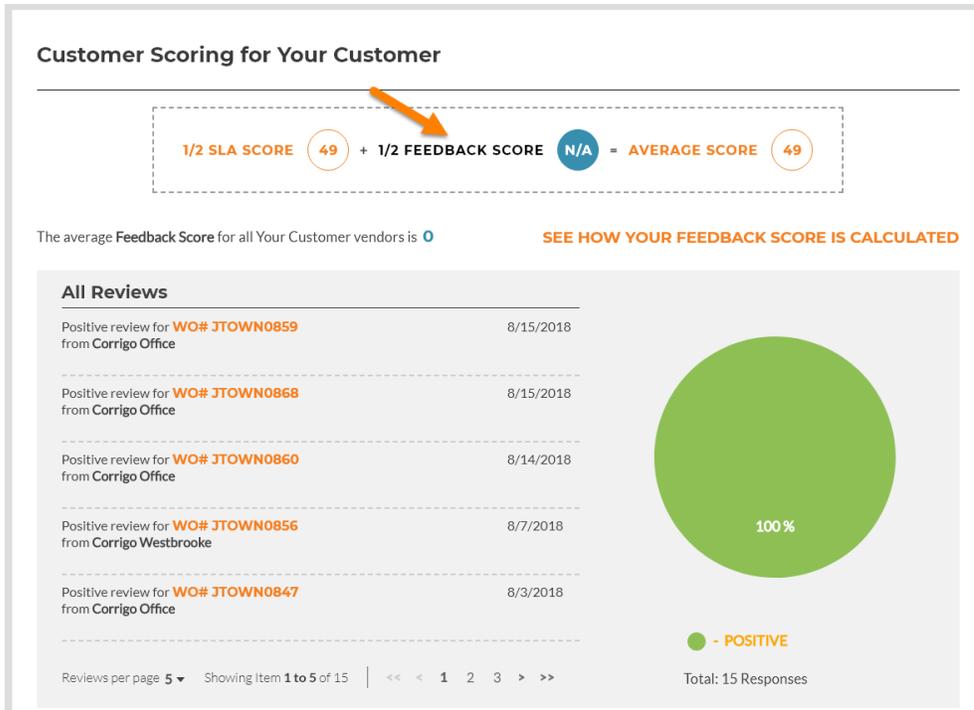
To review additional details, click a customer name shown in orange for additional information

Now you can view additional scoring details for an individual customer. You can also see how each score is calculated:

- SLA (Service Level Agreement) Score
Based on “Accepting/Rejecting”, “Check In”, “Check Out” and invoicing your work orders.
You can also click to review additional SLA score details



- Customer Feedback Score
Rated based on the following criteria – Positive, Negative, Neutral or Not Complete



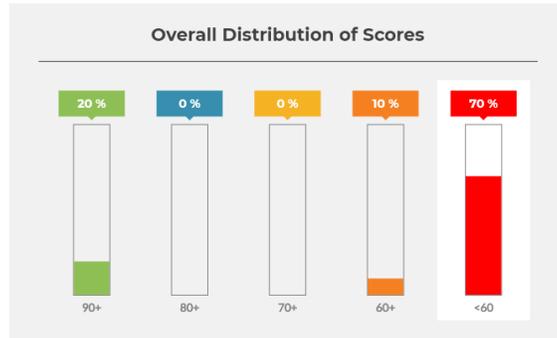
- Average Score
This is your SLA and Feedback Score combined
- Average Score for all vendors

Customer Scoring for Your Customer

$$\text{1/2 SLA SCORE } 49 + \text{1/2 FEEDBACK SCORE } \text{N/A} = \text{AVERAGE SCORE } 49$$

The Average Score for all Your Customer vendors is 46

[SEE HOW YOUR AVERAGE SCORE IS CALCULATED](#)



See how you are doing overall compared to the rest of Your Customer vendors

[RETURN TO CUSTOMERS LIST](#)

CorrigoPro Direct Tile

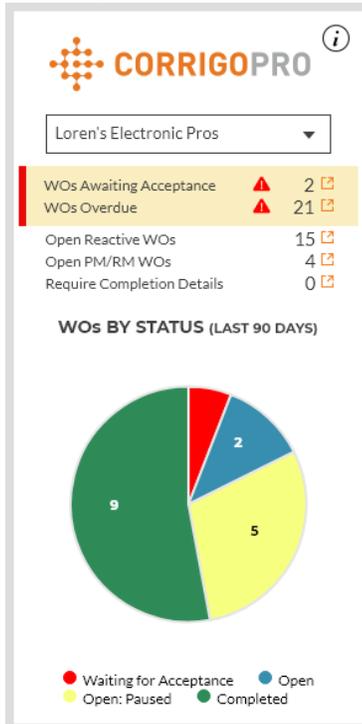


The CorrigoPro Direct is the easiest way for medium and large providers to connect your in-house systems to CorrigoPro thru integration! With CorrigoPro Direct, you can use your existing work order software and still enjoy all benefits of CorrigoPro.

- Automate routine data entry
- Eliminate multiple entries of data into multiple systems
- Save time and money
- Respond faster to customer requests and feedback
- Eliminate data entry errors

To further inquire about CorrigoPro Direct, you can follow this [link](#) to schedule a call with our CorrigoPro Direct team

CorrigoPro Tile



The CorrigoPro tile is where your work orders are located. You can see a bit of real-time work order detail within the tile:

- WOs Awaiting Acceptance
- WOs Overdue
- Open Reactive WOs
- Open PM/RM WOs
- Any WO requiring Completion Details

You can click the  to open the work order view to display work orders meeting specific criteria

A pie chart showing “WOs By Status (Last 90 days)” is displayed within the tile for a quick reference to the status of all your work orders

Click anywhere within the tile to access your work order view

Need additional assistance?

Contact CorrigoPro Support at 1-800-517-2629

or support@corrigo.com