

# Quick Reference Guide

## CorrigoPro – Communicate with CruChats (Desktop & Mobile)

#### Desktop CruChats – Without a Work Order and With a Work Order

There are two types of CruChats within CorrigoPro

 CruChats without a Work Order are instant communications between you, your Cru and Subcontractors within CorrigoPro.

#### Note: You cannot add a Customer to non-Work Order CruChats.

2. CruChats with Work Orders are assigned and sent to you by your Customer to manage within CorrigoPro. You can communicate with your Customer within these CruChats.





#### Desktop – Create & Manage a non-Work Order CruChat

- 1. Click the 🥙 "Our Cru" or 🥙 "Our Subs" icon.
- 2. Click to select each user you wish to include in the CruChat.
- 3. Click the "CruChat" button.





A > CORRIGOPRO		Loren Webster 👻 at Loren's E	Slectronic Pros ▼ │ 📑 / English ↓ Ø 🌞 Loren's Electronic Pros ▼
Q Search Subs	Sor SELECT NONE Sampona Inc (770) 560-5884 1111 Alderman Drive, Alpharetta, GA 30005, US	CRUCH Test Company (678) 591-9785 Webster 1985@gmail.com	Ordered by:     Name (A-Z) →       AT     REINVITE

Once a non-Work Order CruChat is created, users can add messages, files, documents, and add/remove users within the CruChat.

Note: Users who are greyed out are CruLeads and will be automatically included in the CruChat.

 Yeston Chal was created by Loren Wildner D Toters: D Add other CorrigoPro users bit the Curchat
Share documentaffies in the CruChat
Type a message within the Cruchat



#### Desktop – Manage a Work Order CruChat

Work Order CruChats are created by each Customer, then assigned to your company to manage within CorrigoPro. Click anywhere on the Work Order to open the CruChat.

	Requestor Demo LW	WO# 25AVE0051 WAITING FOR ACCEPTANCE REQUEST: Request 10/14/20	20
(5)	<b>25th Ave- 34623</b> <sup>25th Ave- 34623</sup> 2417 25th Ave, Gulfport, MS 39501	New WO#254VE0051 is awaiting your attention	
		New Work25/WE005115 uwarding your attention	
		Requestor Demo LW	
12 INTERNAL NOTE WOODERALS CRUCHAT	Requestor Demo LW WO# 25AVE0051 at 10/14/2020 Work Order number assigned by your Customer Requestor Demo LW, 10:17 AM This work was requested by 34623 Manager (Cl05; (000); 001-0527) Click to update APPOINTMENT INFO Requestor Demo LW, 10:17 AM SERVICE LOCATION 20th Str 20th APPOINTMENT INFO Choose the audience of who can view messages added to the CruChat UNCR Type a mer Co Requestor Demo LW, 10:17 mathematic and the comparison of the compa	Server L Molling for Acceptance C Molling for	

### Mobile – Create and Manage a non-Work Order CruChat

- 1. Tap the "CorrigoPro" app on the mobile device.
- 2. Tap "View CruChats."
- 3. Tap the icon then tap "Create ProChat."
- 4. Select the users to include in the CruChat then tap "Create."

#### Note: You can add multiple users to a non-Work Order CruChats.

Once a non-Work Order CruChat is created, users can add messages, files, documents and add/remove users within the CruChat.



## Mobile – Invite Non-Connected Customers to CorrigoPro

Non-Connected Customers do not use Corrigo back-office software to create and manage Work Orders within the Corrigo Platform. It is **optional** to reach out to them and request them to send Work Orders in the Corrigo CruChat format.

#### Note: Only CruLeads can add Non-Connected Customers within CorrigoPro Mobile

- 1. Tap "View CruChats."
- 2. Tap "All Contacts."
- 3. Tap "Customers" then tap the 🌆 icon.
- 4. Enter a mobile number for the Customer.

Only a Mobile phone number can be entered to invite a Non-Connected Customer.

5. Enter a brief introduction message to invite the Customer to join you on CorrigoPro.

6. Tap "Invite." This will send a text message to the Customer requesting for them to send Work Orders using CorrigoPro CruChats.

내 AT&T 🗢 4:00 PM	🖵 100% 🔲 🗲	ull AT&T 🗢	4:02 PM	🖵 100% 🛑 †	nii at&t 🗢	4:03 PM	🖵 100% 💼 🗲	nii atat 🗢	4:05 PM	🖵 100% 💳 🗲
CorrigoPro	1	<	Cručinats		<	All Contacto	<b>→ 1</b> 0	×	Add Custome	r
Loren's Electronic Pros	~	Loren's E	📧 All Conta	acts	Customers	Cru	Subs	Customers	Cru	Subs
View CruChats	• >	(404) 65	G Create P	roChat	Q Search			Send a te	kt to your Cust	omer with
WOs Awaiting Acceptance	<b>▲</b> 9 >	Le Corria	11. CorrigoP	ro Network	QA Request	tor for CorrigoPro	D	a link to d Request.	After they have	goPro e installed
WOs Overdue	<b>▲</b> 35 >	Participant	s: Brandon Harris,	CorrigoPr	QA Reques	tor for CorrigoPro	)	name and	phone numbe	ered their r, they'll be
Open Reactive WOs	20 >	WO# 1230011 NON-URGENT	Open: In Progress	10/29/20 /	Requestor I	Demo LW	8-1	a CruChat	to you and ab	rvice.
Open PM/RM WOs	6 >	Loren's Cu Loren's Locat Please cheo	ustomer <sup>ion</sup> tk out when you c	omplete	Stage Alorio	a		Enter	Cell Phone #	
Require Completion Details	0 >	working or 6677 Sunse	pause if you need t Hills Boulevard, Rex, GA	a break 30273, US	Stage Build	ing Services Netw	vork	戻 Messag	e (160 characters	s max)
WOs BY STATUS (LAST 90	0 DAYS)	Stage Alorica	0154 Rejected	10/15/20 🕻	Stage P&G	á '		160	Invite	
	4	Albuquerque Work order 4200 Osuna	- General r has been rejected Rd NE, Albuquerque, NN	d M 87109, US	Your Custor	mer				
		Stage Alorica	0204 Open: In Progress	10/14/20 >	Invited	(404)	692-4299 🌭			$ \rightarrow $
36		NORMAL Clovis		18	Invited	(404)	404-0000 🌜	6	to the	SP -

## Mobile – Create CruLeads & CruMembers

CruMembers and CruLeads can also be added using the CorrigoPro Mobile app. This is a way to add users while working in the field.

#### Note: Only current CruLead users will be able to add other CruLeads & CruMembers.

- 1. Tap "View CruChats."
- 2. Tap "All Contacts."
- 3. Tap "Cru" then tap the Lo icon.
- 4. Tap the slider to indicate if the user will be a CruLead.
- 5. Enter a mobile number for the user.
- 6. Type a short message to advise the user to download the CorrigoPro Mobile App.
- 7. Click "Invite."

The user will receive a text message containing instructions to download the mobile app to their iPhone or Android smartphone to begin the setup process to receive and manage Work Orders.



#### Mobile – Invite Subcontractors

CruLeads can add and invite subcontractors to join them on CorrigoPro to view/manage Work Orders. If the subcontractor currently uses CorrigoPro, you can send an invitation to connect with them.

Subcontractors who are not currently registered in CorrigoPro will be required to complete the CorrigoPro registration process before you are able to connect with them and assign them to Work Orders

- 1. Tap "View CruChats."
- 2. Tap "All Contacts."
- 3. Tap "Subs" then tap the 🔤 icon.
- 4. Enter the company name and phone number of the Subcontractor then tap "Search." This will begin the process to determine if they are using the CorrigoPro Network.
- 5. Once the search results appear, you can select the company if it appears. Tap the company name then tap "Connect."
- 6. If not, tap the "Invite" button to begin the process of inviting & adding your Subcontractor to the CorrigoPro Network.



## Mobile – Add & Remove CruChat Participants to Work Order CruChats

You can add CruLead, CruMember and Subcontractors to your Work Orders using the using the mobile app. This will give them access to and allow them to manage the Work Order. Note: You can add multiple users to Work Order CruChats. CruLeads by default will have access to all Work Order CruChats.

- 1. Tap "View CruChats" to display the list of your Work Orders.
- 2. Select and tap the Work Order you are looking to manage.
- 3. Tap the icon then select "Participants."
- 4. Select the users you wish to add to the Work Order then click "Save."





Need additional assistance? Contact CorrigoPro Support at 1-800-517-2629 or <u>support@corrigopro.com</u>

VERSION CONTROL: Revision: 1.0 | Loren Webster | 11/19/2020 | First Release