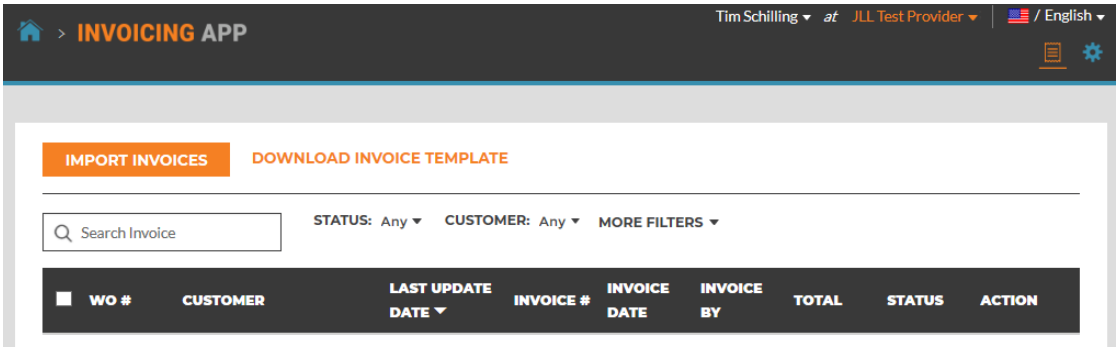
Quick Reference Guide

CorrigoPro – Invoicing App

Submitting Invoices using the Invoicing App

- After clicking on the Invoice option in a Work Order thru CruChats, or clicking on the Invoicing App on the home page, you will be able to submit invoices using the Invoicing App
- The home page of the invoicing app has a search feature, a few filters, and the ability to download invoice templates for bulk invoice uploads. You also can update Zero-Dollar invoice settings on the Invoice App.



- Filter by the invoice **Status**, a specific **Customer**, **Branch**, **Invoice Date**, **Last Update Date**, **Type**, **Invoice By**, or Total.

  In order to submit an invoice, it must be in completed status, so you may need to check in/out.
- All columns with the exception of **Action** can be used to sort invoices – alphabetically or numerically.
- Click on the icon to get to Settings.

  From here you can toggle on or off the ability to Auto-Submit Zero Dollar Invoice.

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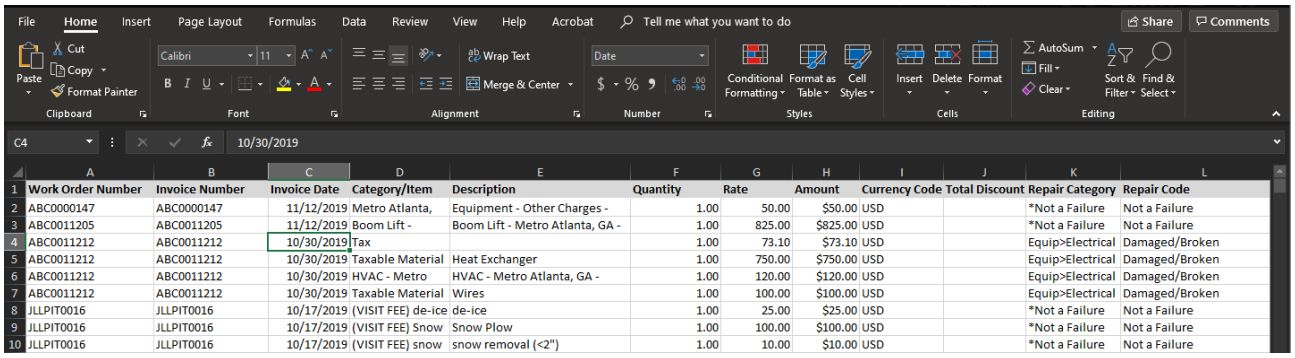
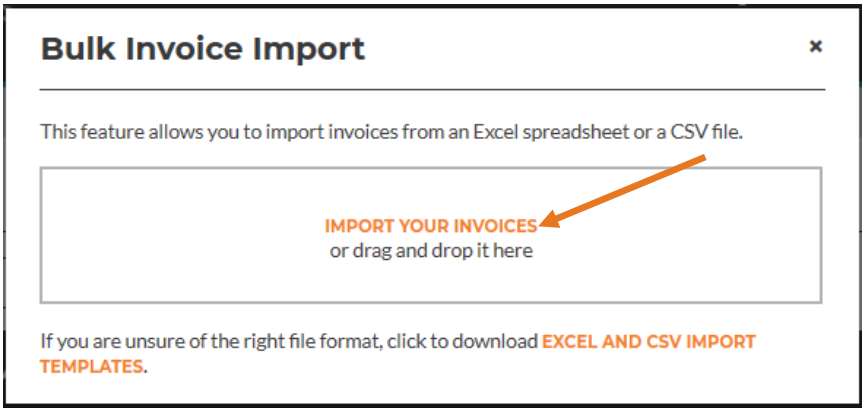
- To submit invoices in bulk, click on **DOWNLOAD INVOICE TEMPLATE** to get a template to help guide you in your import.
- After you have reviewed the template you can select multiple Work Order numbers on the homepage of the Invoicing App so that you get the options to **Export**, **Reset**, or **Submit** those invoices en masse.

  If you click **RESET** it will "reset" the invoice, meaning it will erase everything currently on the invoice.
- Click Export to bring the current invoices into a spreadsheet and fill out the appropriate blank fields to import back en masse.

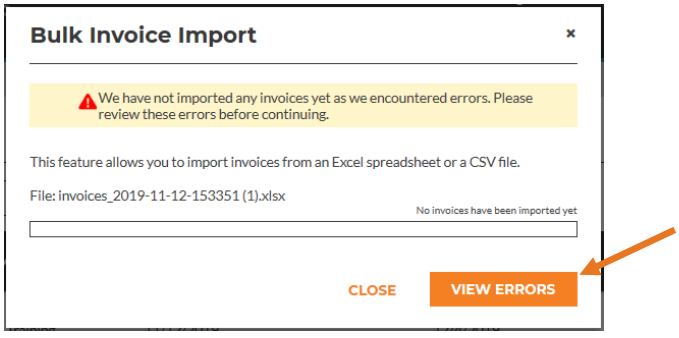


Work Order Number	Invoice Number	Invoice Date	Category/Item	Description	Quantity	Rate	Amount	Currency Code	Total Discount	Repair Category	Repair Code
ABC0000147	ABC0000147	11/12/2019	Metro Atlanta,	Equipment - Other Charges -	1.00	50.00	$50.00	USD		*Not a Failure	Not a Failure
ABC0011205	ABC0011205	11/12/2019	Boom Lift -	Boom Lift - Metro Atlanta, GA -	1.00	825.00	$825.00	USD		*Not a Failure	Not a Failure
ABC0011212	ABC0011212	10/30/2019	Tax		1.00	73.10	$73.10	USD		Equip>Electrical	Damaged/Broken
ABC0011212	ABC0011212	10/30/2019	Taxable Material	Heat Exchanger	1.00	750.00	$750.00	USD		Equip>Electrical	Damaged/Broken
ABC0011212	ABC0011212	10/30/2019	HVAC - Metro	HVAC - Metro Atlanta, GA -	1.00	120.00	$120.00	USD		Equip>Electrical	Damaged/Broken
ABC0011212	ABC0011212	10/30/2019	Taxable Material	Wires	1.00	100.00	$100.00	USD		Equip>Electrical	Damaged/Broken
JLLPIT0016	JLLPIT0016	10/17/2019	(VISIT FEE) de-ice	de-ice	1.00	25.00	$25.00	USD		*Not a Failure	Not a Failure
JLLPIT0016	JLLPIT0016	10/17/2019	(VISIT FEE) Snow	Snow Plow	1.00	100.00	$100.00	USD		*Not a Failure	Not a Failure
JLLPIT0016	JLLPIT0016	10/17/2019	(VISIT FEE) snow	snow removal (<2")	1.00	10.00	$10.00	USD		*Not a Failure	Not a Failure

- To import invoices en masse, after you edit, and save the file as seen above, click the IMPORT INVOICES button at the top of the homepage on the Invoicing App.
- Upload the saved invoices document on the pop up.



- If you have any errors on your import, you will receive the following error screen. Click on **VIEW ERRORS** to identify what the issues are for this import.



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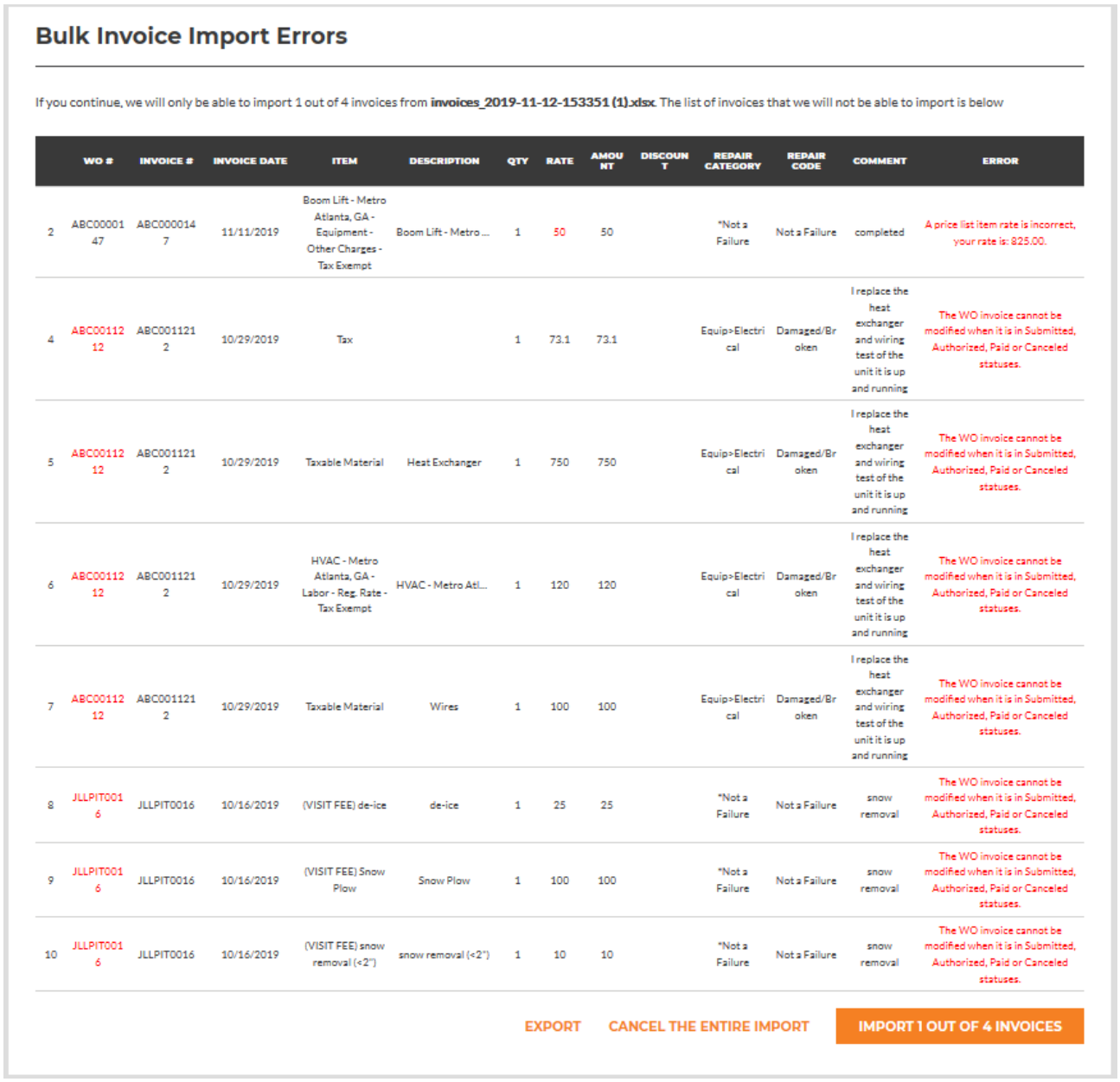
- The Bulk Invoice Import Errors page will tell you exactly what is wrong with each individual row in your import, and let you know how many invoices on the sheet can still be imported, if you choose to continue.



Bulk Invoice Import Errors

If you continue, we will only be able to import 1 out of 4 invoices from **invoices_2019-11-12-153351 (1).xlsx**. The list of invoices that we will not be able to import is below

	WO #	INVOICE #	INVOICE DATE	ITEM	DESCRIPTION	QTY	RATE	AMOUNT	DISCOUNT	REPAIR CATEGORY	REPAIR CODE	COMMENT	ERROR
2	ABC0000147	ABC0000147	11/11/2019	Boom Lift - Metro Atlanta, GA - Equipment - Other Charges - Tax Exempt	Boom Lift - Metro ...	1	50	50		*Not a Failure	Not a Failure	completed	A price list item rate is incorrect, your rate is: 825.00.
4	ABC0011212	ABC0011212	10/29/2019	Tax		1	73.1	73.1		Equip>Electrical	Damaged/Broken	I replace the heat exchanger and wiring test of the unit it is up and running	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
5	ABC0011212	ABC0011212	10/29/2019	Taxable Material	Heat Exchanger	1	750	750		Equip>Electrical	Damaged/Broken	I replace the heat exchanger and wiring test of the unit it is up and running	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
6	ABC0011212	ABC0011212	10/29/2019	HVAC - Metro Atlanta, GA - Labor - Reg. Rate - Tax Exempt	HVAC - Metro Atl...	1	120	120		Equip>Electrical	Damaged/Broken	I replace the heat exchanger and wiring test of the unit it is up and running	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
7	ABC0011212	ABC0011212	10/29/2019	Taxable Material	Wires	1	100	100		Equip>Electrical	Damaged/Broken	I replace the heat exchanger and wiring test of the unit it is up and running	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
8	JLLPIT0016	JLLPIT0016	10/16/2019	(VISIT FEE) de-ice	de-ice	1	25	25		*Not a Failure	Not a Failure	snow removal	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
9	JLLPIT0016	JLLPIT0016	10/16/2019	(VISIT FEE) Snow Plow	Snow Plow	1	100	100		*Not a Failure	Not a Failure	snow removal	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.
10	JLLPIT0016	JLLPIT0016	10/16/2019	(VISIT FEE) snow removal (<2")	snow removal (<2")	1	10	10		*Not a Failure	Not a Failure	snow removal	The WO invoice cannot be modified when it is in Submitted, Authorized, Paid or Canceled statuses.

EXPORT CANCEL THE ENTIRE IMPORT IMPORT 1 OUT OF 4 INVOICES

- You can continue and import all invoices that are correct or cancel the entire import to edit the sheet and fix your errors.
- You can also **EXPORT** this sheet to have an excel file showing all your errors to help you fix all errors after you navigate away from this page

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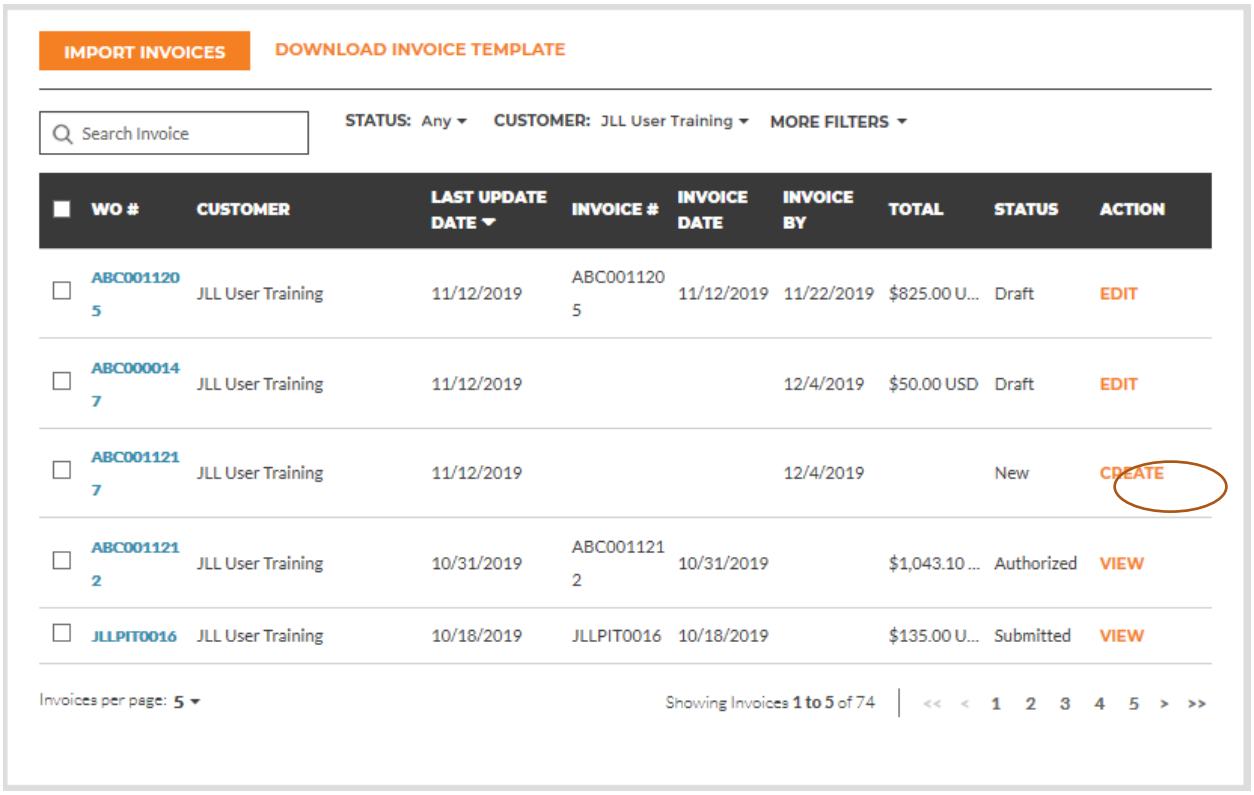
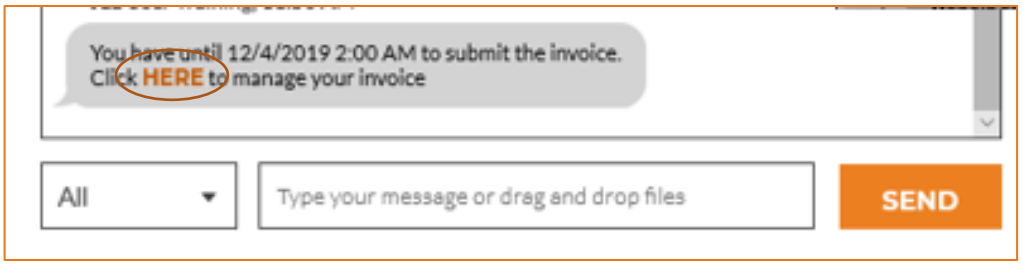
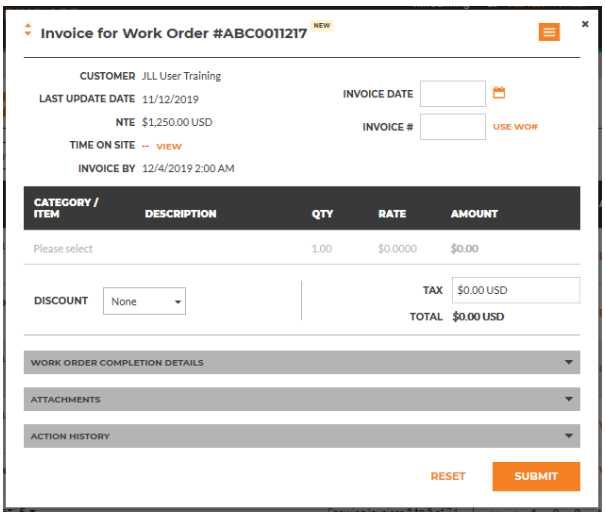
- To Invoice a work order individually you can click on the Invoice here option on the Work Order in CruChats or click on the **CREATE** option under the **Actions** column in the Invoicing App to find your invoice.





- You will see the next pop up to fill out your invoice for submission.



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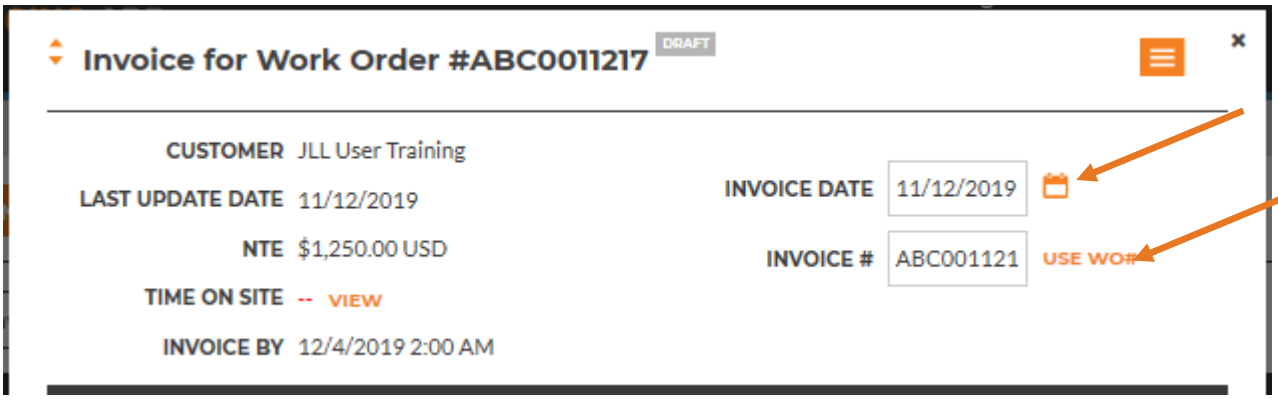
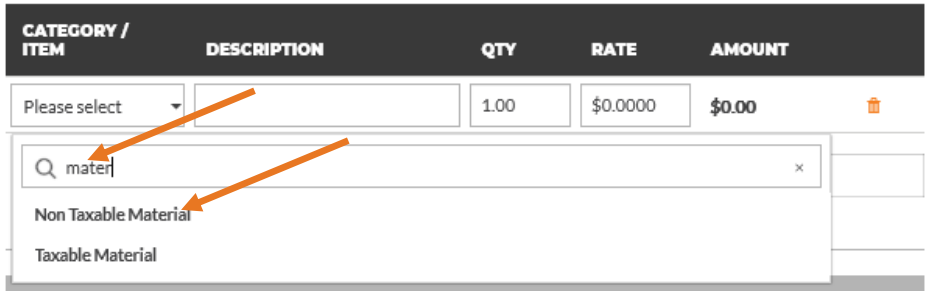
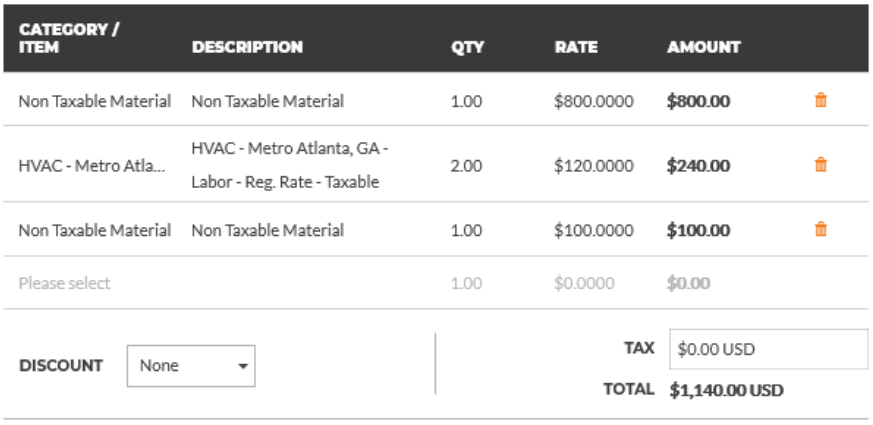
- Fill out the Invoice Date and Invoice Number. Invoice date will typically be the current date and the Invoice Number will vary depending on client but using the WO# is best practice. This will avoid duplicates and ensure a stable nomenclature per client.
- You can click on the Calendar icon to fill out the date, it will default to the current date.
- You can click on USE WO# to auto fill the invoice number field.



- To add invoice line items, click on the area that says Please select to pull up your rate card that is pre-loaded in the instance.

- Fill out all invoice items by typing in and clicking on what you need to add, filling out the quantity and rate (if applicable).





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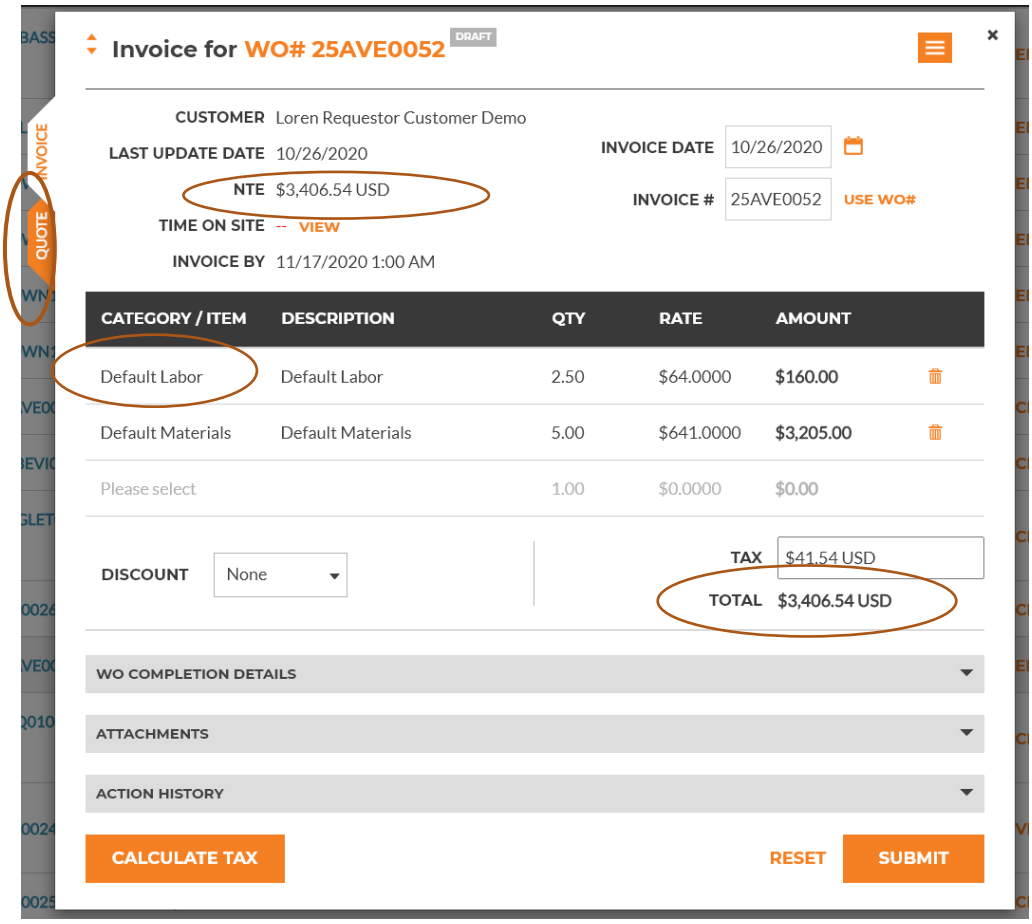
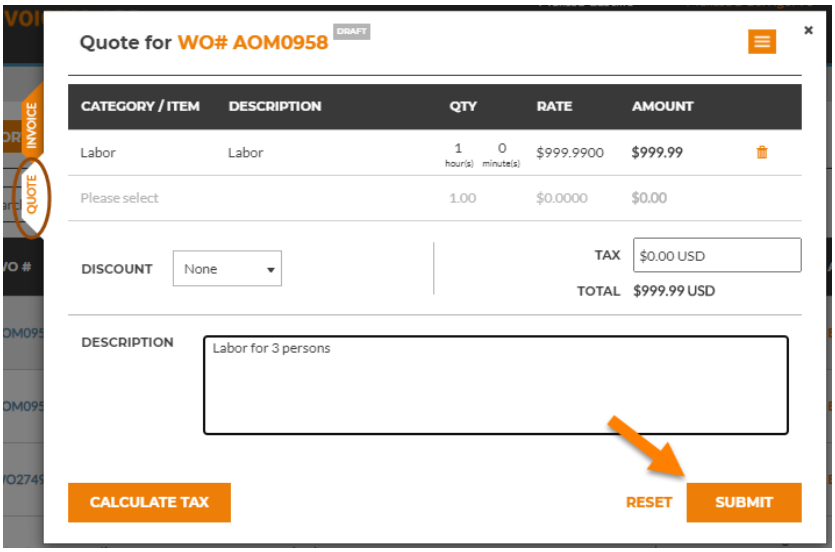
- Calculate tax on all taxable line items and add that to the tax section then double check to ensure the total is not higher than the NTE.
- If invoice total is higher than NTE, please click the “Quote” tab on the top left of the invoice. There you can enter the line item and amount of the Quote and SUBMIT that to your Requestor.





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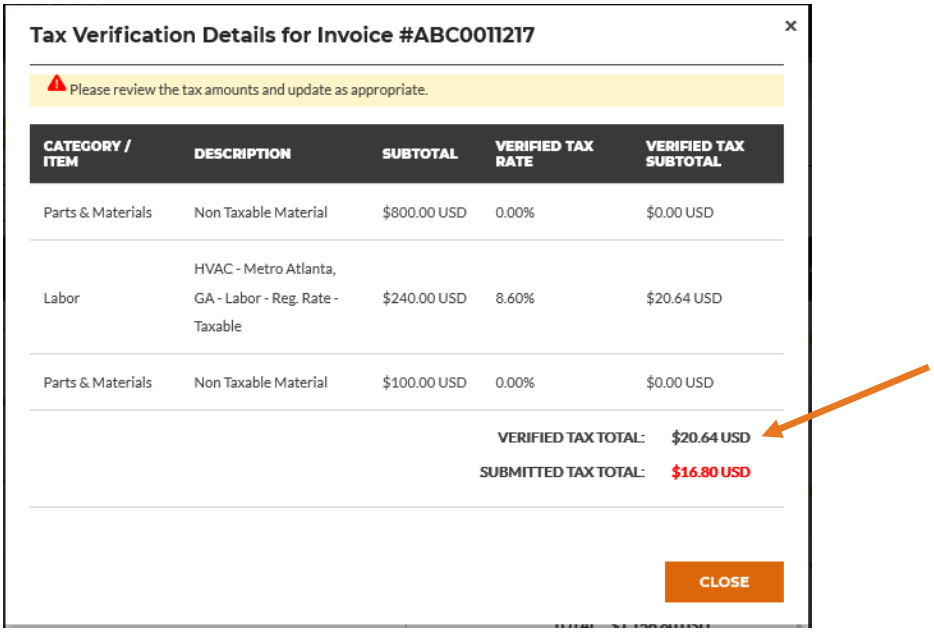
- After verifying that the correct NTE and Line Items are input on the Invoice, click SUBMIT. The system will run the taxes to ensure the taxes match up. If not you will receive a tax error that will show up at the top of the screen and it will tell you the correct amount of taxes for this WO location.

- Click on the TAX VALIDATION FAILURE error notification to view the error.



- After viewing the error, close this page out and enter in the Verified Tax Total in the line item where the incorrect tax total was located and re-submit.

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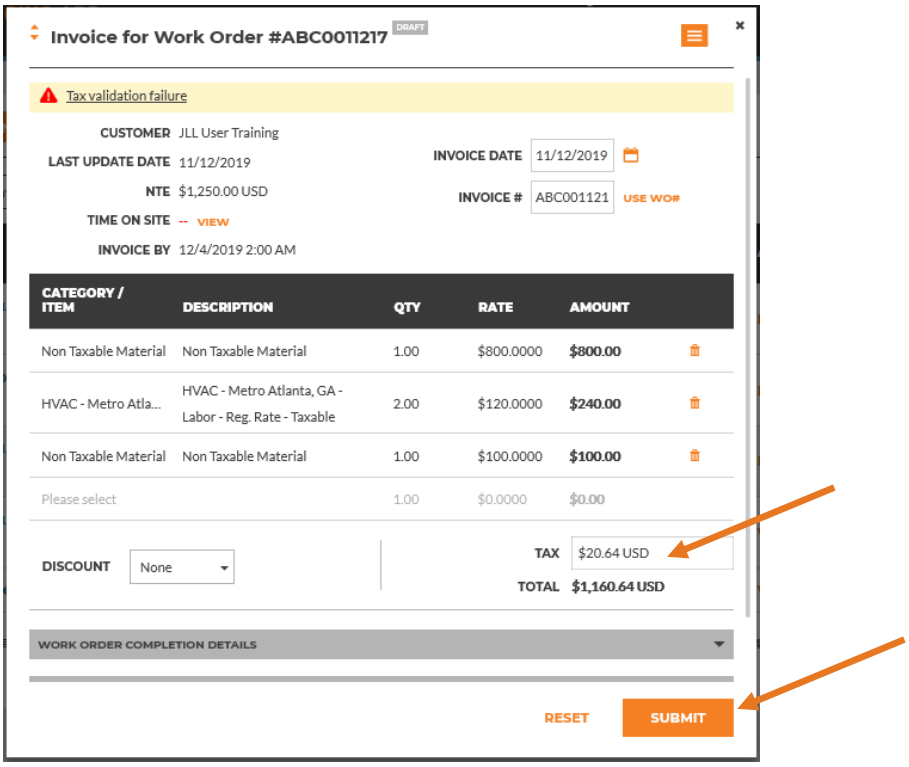
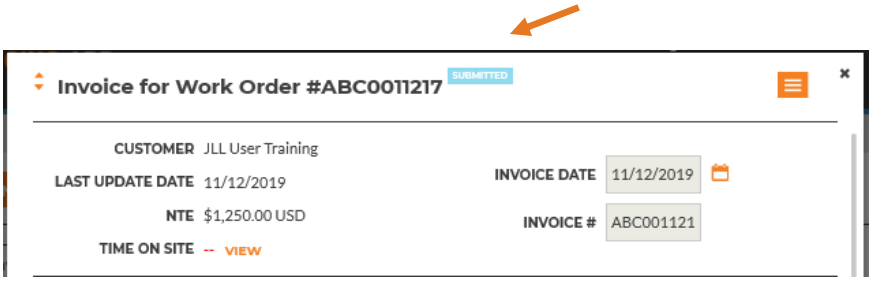


- Your invoice has been successfully submitted!



- Note: once an Invoice is submitted, you cannot edit the invoice. You will need to contact the customer who can dispute the invoice in the back office, this will allow you to submit an updated invoice.

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