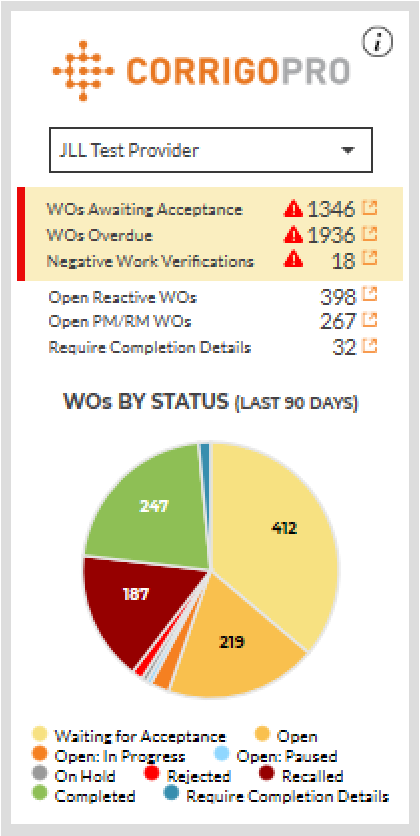
Quick Reference Guide

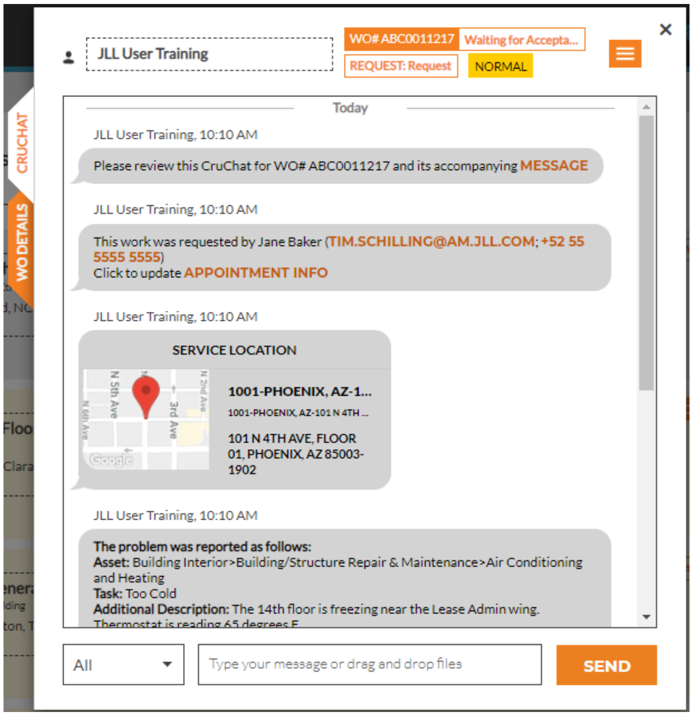
CorrigoPro – Managing a Work Order in Corrigo Pro Desktop

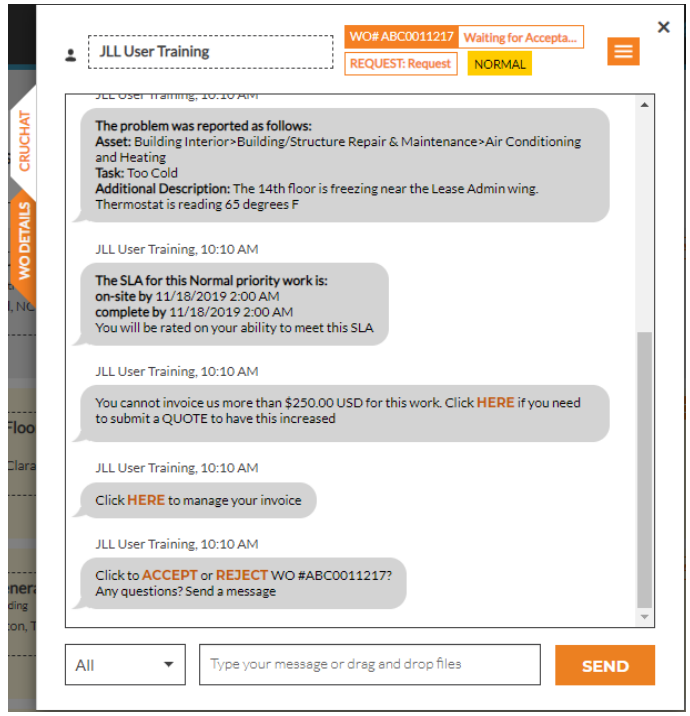
- Managing a Work Order in CorrigoPro – Desktop

  - Log in to CorrigoPro.
  - Click on the Grid, or App, that looks like the one below. This App will bring you into your CruChats/Work Orders.

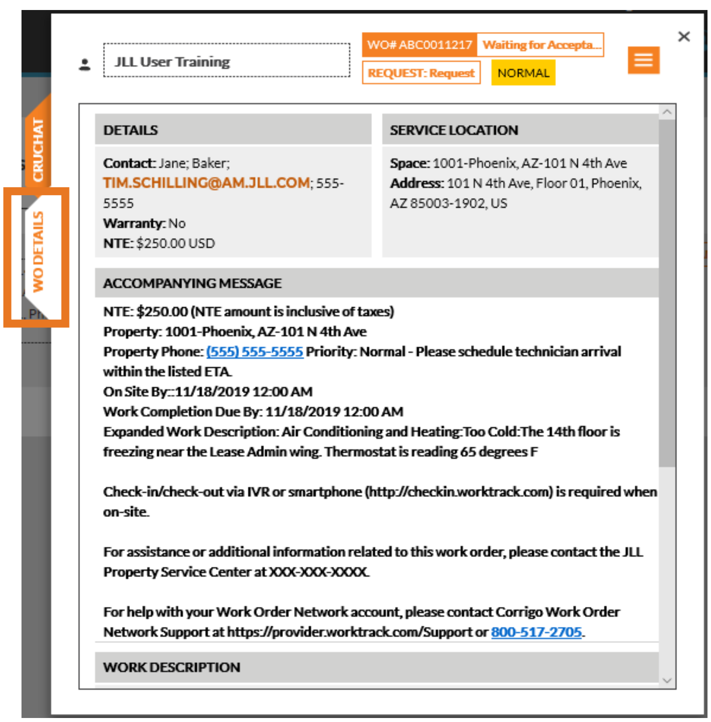


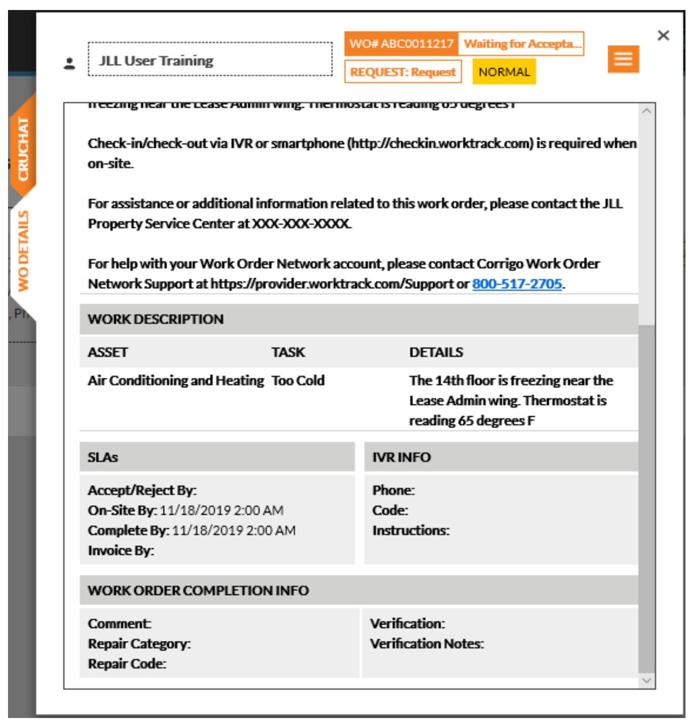
- On the CruChats or Table View, click on a Work Order to bring the pop-up view of your Work Order.



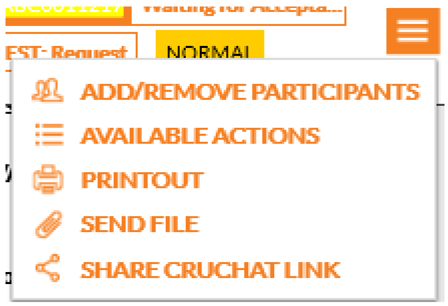


- Click on the WO Details tab to view the full work order details in a quick view page.

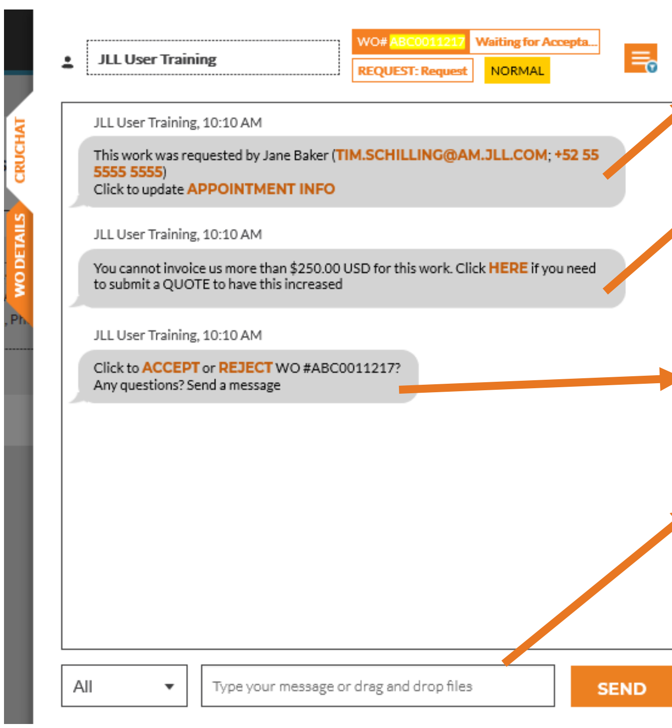




- Click on the icon to bring up more available actions.

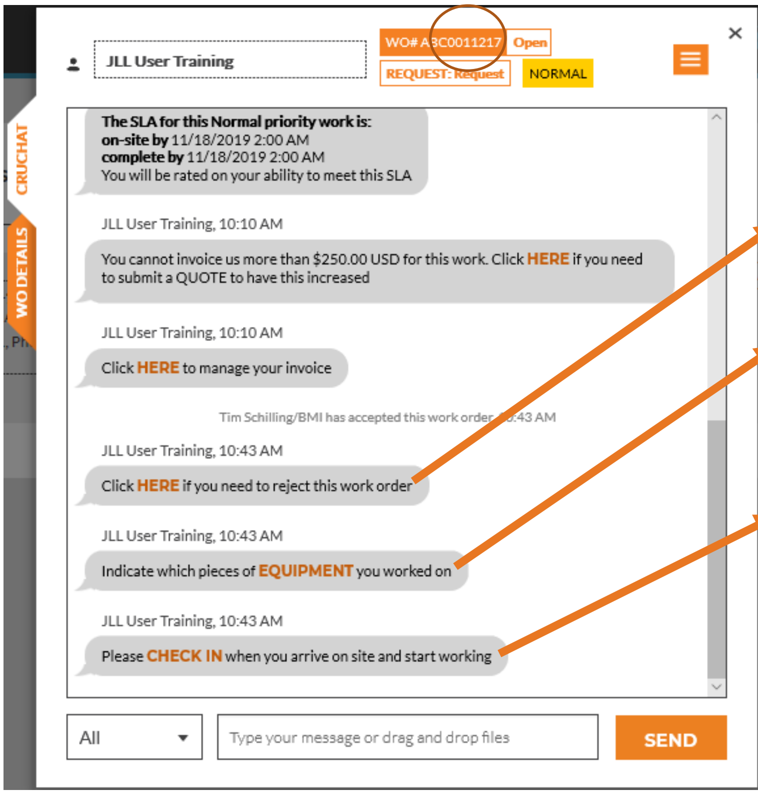


- From here, if you select **Available Actions,** it will bring you back into the CruChat tab, and only list out what the available actions are for the current state of the work order.
- For a new Work Order that has yet to be picked up, you can:



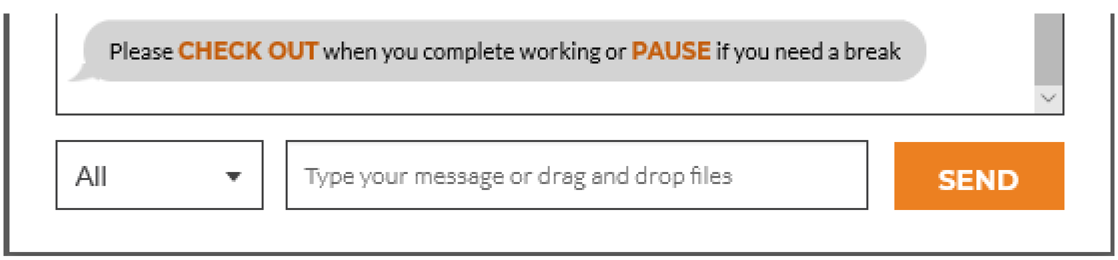
- See linked contact information for reference, as well as the ability to schedule when you will be on site.
- Submit a quote to get a higher NTE. Typically, not don't at this stage of the work order life cycle, unless you know you will need a higher NTE.
- If this work is within your scope, you can receive the Work Order by clicking **ACCEPT** or decline the Work Order by clicking **REJECT.**
- Send messages to your customer, Cru Leads, or all Cru, by typing into this free-form text box. You can also attach a document to this work order by dragging a file over and dropping it anywhere in this pop-up.

- If the Work Order has been accepted, or "picked up," you will have three more available actions. Please also note that the WO State at the top of the pop-up has been updated from **Waiting for Acceptance** to **Open.**
- You can also, at any point in time of the Work Order life cycle, send a message to your Customer, Cru Leads or all Cru, as well as attach a file to the Work Order by typing or drag/drop the file into the free form text box, as seen above.

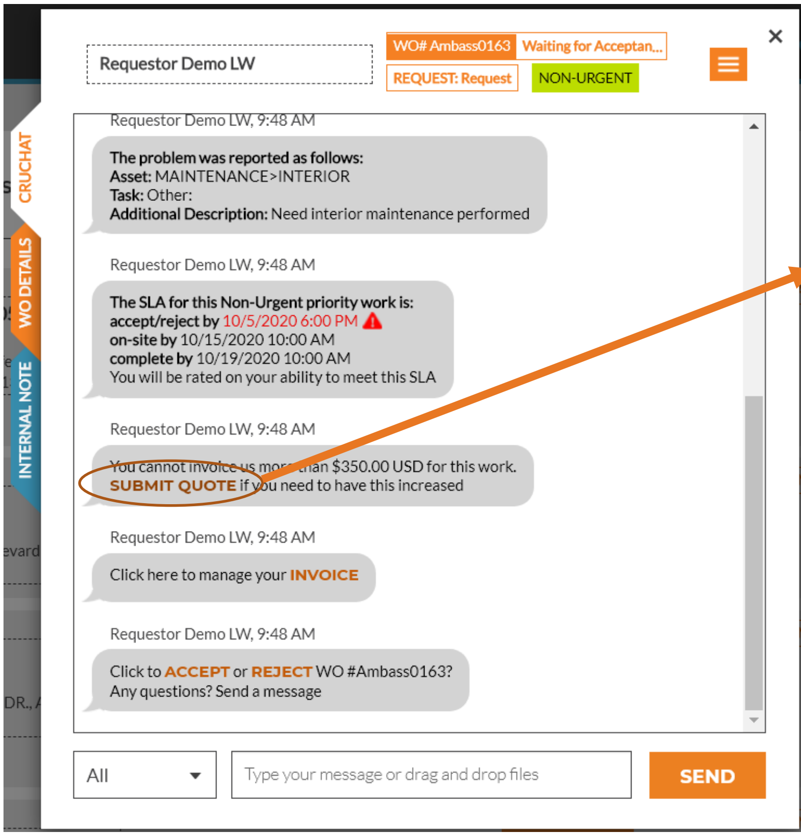


- If needed, you can still **REJECT** this work order.
- If you are working on a specific Equipment Asset, please tag that asset by using this link.
- **CHECK IN** the Work Order when you arrive on the site. This may ask for your location, it's best to do this using a mobile app.

- After checking into the Work Order, please note that the state at the top changes to show **Open: In Progress**. You will also have another Available Action after checking into the work order. This action will be to either **CHECK OUT** or **PAUSE** the work order.
- If you click **CHECK OUT** the Work Order will then prompt you to complete the work order. Please do not check out of a work order until the work is fully completed.
- If you click **PAUSE** this will update the Work Order state to show as **Open: Paused**. This is for when you need to take a break from the work order, leave on lunch, or end your workday and come back another time, and is optional while awaiting a quote approval,

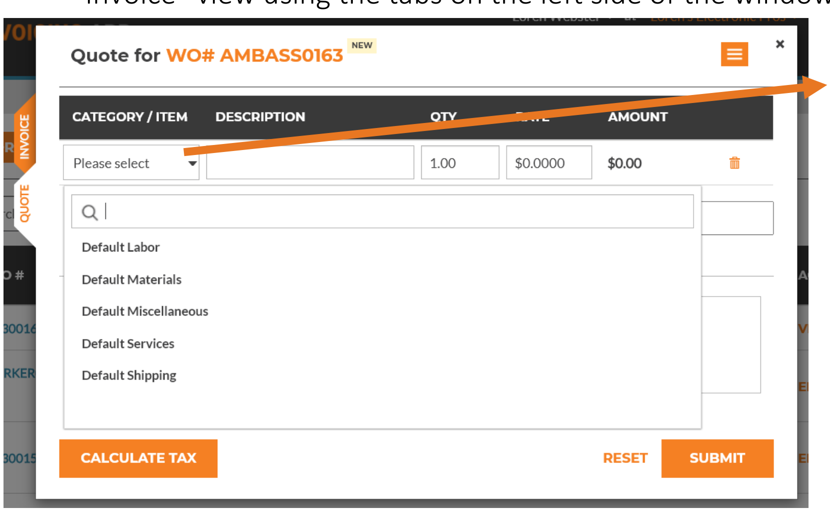


- To submit a quote, select the below action where it says “**SUBMIT QUOTE.**”
  Note: Only desktop Administrator users will be able to submit quotes.

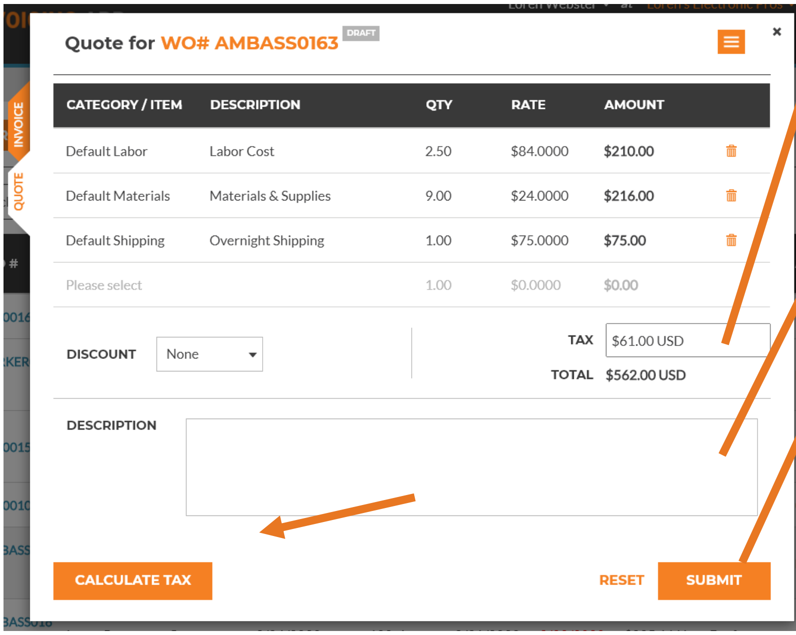


Click HERE to submit a Quote for NTE increase.

- Submitting a quote is tied to the Invoicing App. Quotes are created based on the price list/rate card on file with your customer used during the Invoicing process. You can attach additional documentation by dragging files within the CruChat window, but the Quote must still be itemized to be submitted correctly.
- Once a quote has been approved by your customer, the approved quote itemization will be automatically copied directly to the invoice. You can also toggle between the “Quote” and “Invoice” view using the tabs on the left side of the window.

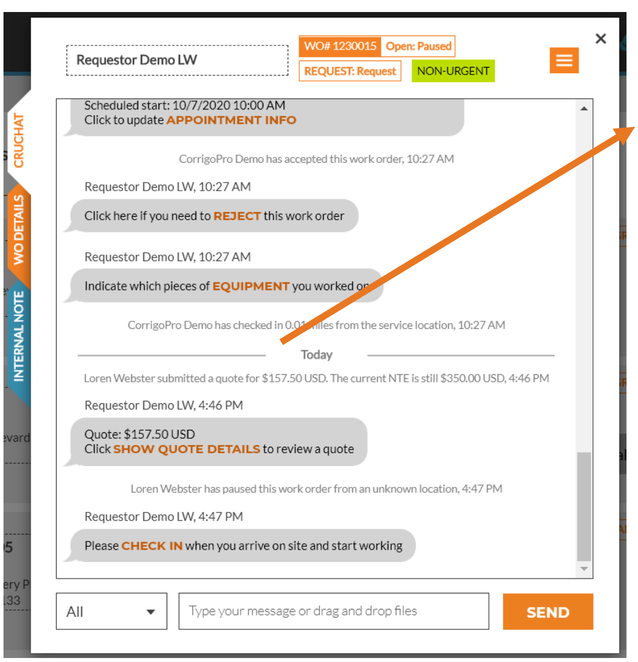


- Click “Please Select” to display a drop-down list lof your price list/rate cards items to build your Quote. You can add as amany items as need to create your Quote.



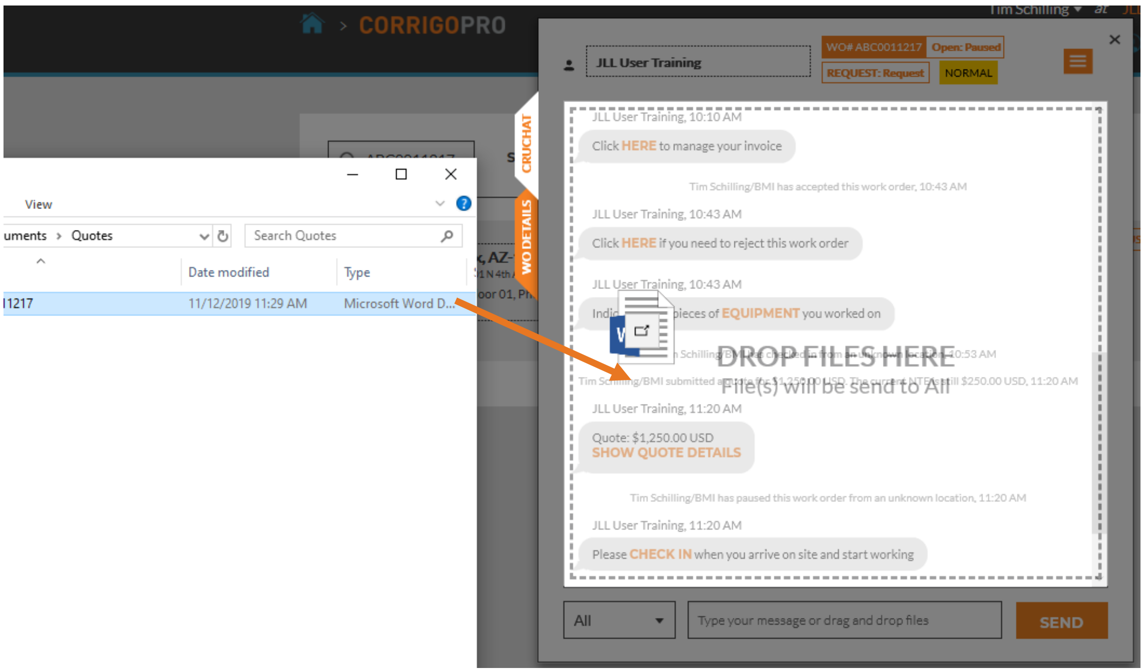
- Enter the amount of any taxes to be included in the quote. You can also use the "Calculate Tax" option if your customer offers preset tax tables.
- Add any additional description details to complete the quote.
- Click "Submit" when you have completed your quote and are ready to submit it to your customer.

- As a best practice, we encourage users to "Pause" a Work Order while awaiting quote approval, but it is not a requirement. Work Orders can still be managed and completed while a quote is pending approval from a Customer. However; Invoices should never be submitted until Quotes are approved.
- If you realized that the Quote amount that you submitted was not high enough, please ask for the customer to **REJECT** the quote so that you can submit another quote for approval
- After submitting the quote for approval, you will see one more Available Action titled **SHOW QUOTE DETAILS** which allows a view of the submitted quote information.
- Note that the WO State at the top has may change to **Open: Paused** if you Pause the Work Order, as a best practice.

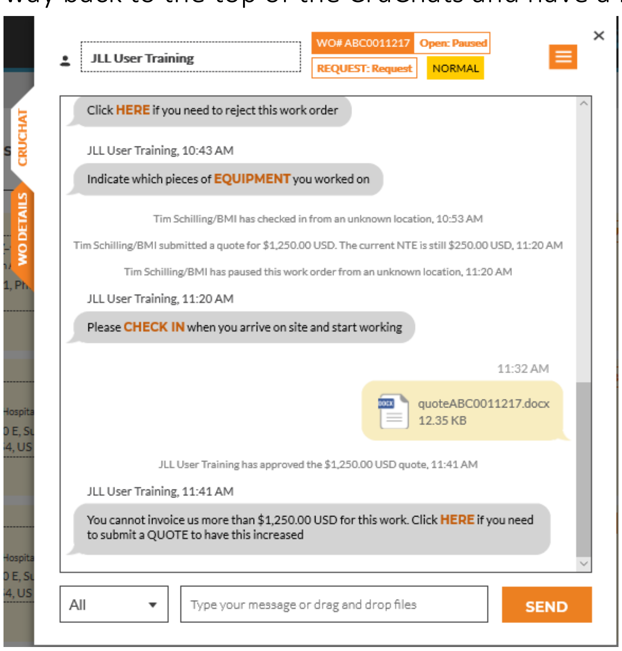


- Click "Show Quote Details" to review information for a previously submitted quite.

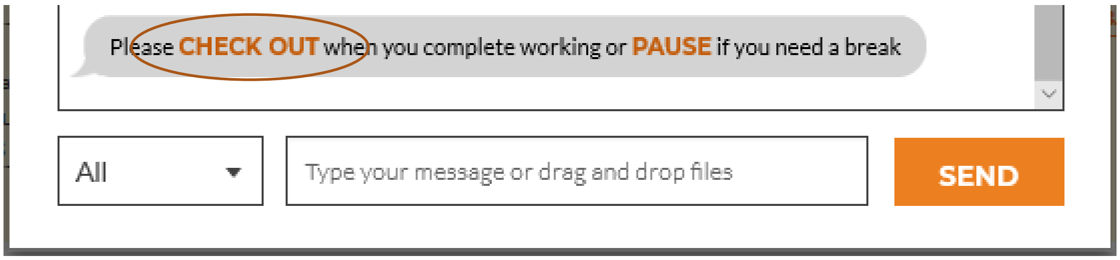
- To attach a document to support your quote, pull up your documents where you have the quote saved, and drag the file anywhere on the pop up of the Work Order.



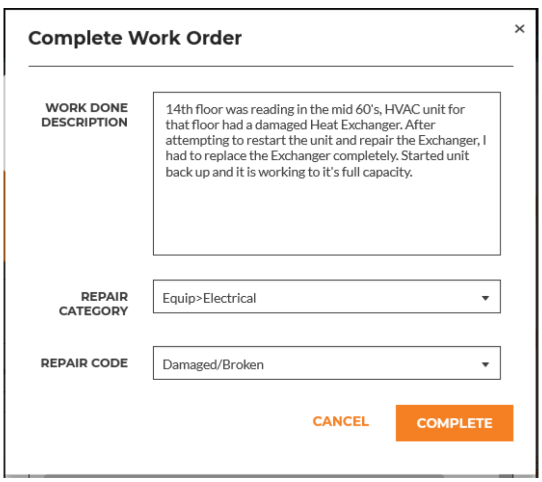
- After quote approval has been received, you can check in again and complete the work scheduled.
- You will be notified, via email, based on your settings (covered above) when the quote is approved, you also will be notified on the CruChats view, as the Work Order will work its way back to the top of the CruChats and have a notification telling you the new NTE.



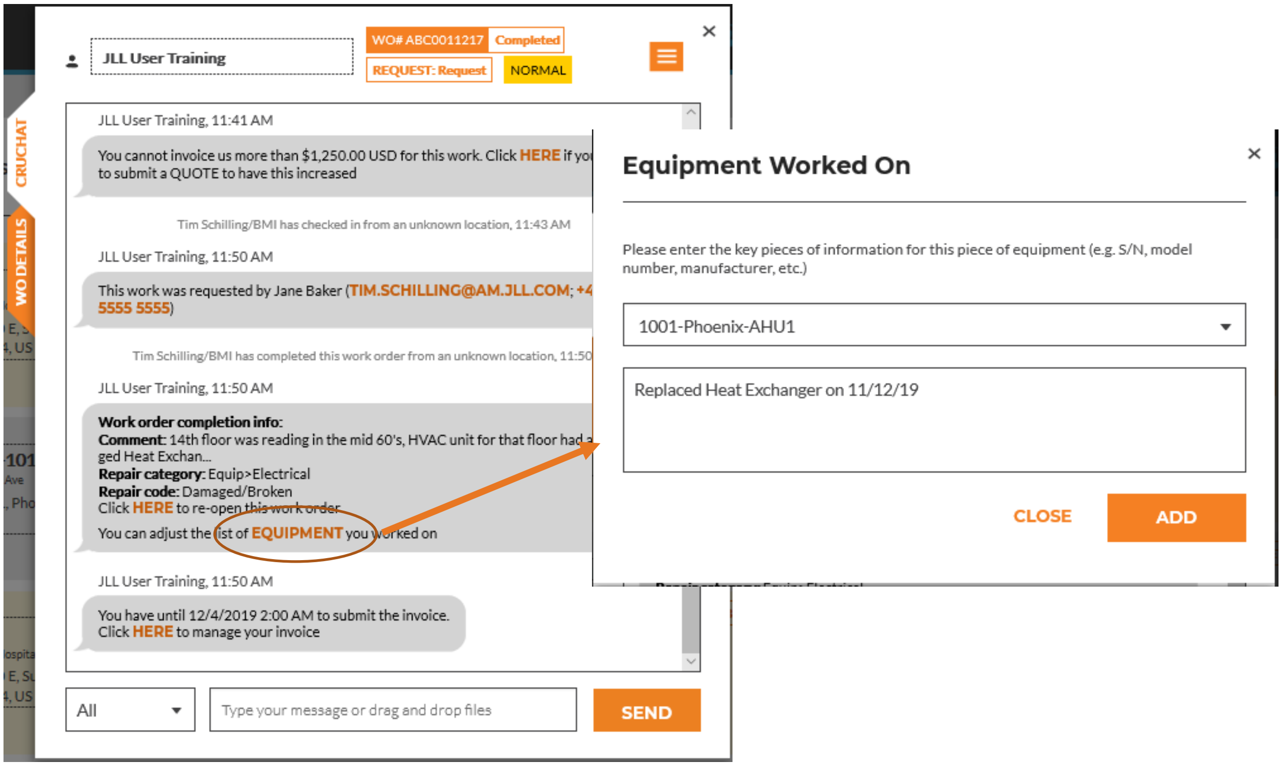
- **CHECK IN** the work order to complete the work once you have all the materials acquired.
- Once the work has been fully completed, please click on **CHECK OUT** to complete the Work Order.



- Checking out of a Work Order will prompt you to complete the Work Order, enter in a description of the work done and fill out the failure code as necessary.



- Click on Complete to complete the Work Order.
- If you have not yet, please add any Equipment worked on by clicking on **EQUIPMENT**.



- Once you have completed the Work Order and the Equipment worked on has been added, you can finally invoice the Work Order.
- For some customers, you will not be able to submit an invoice or receive payment on your invoice until the Work Order is verified.
- Click HERE to manage your invoice to bring up the Invoicing App.