

# FAQs

## CorrigoPro – North America

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## LOGGING IN

### 1. How can I log into CorrigoPro?

- a. Go to [CorrigoPro.com](https://CorrigoPro.com) and click on the orange **LOG IN** button in the top right. The correct region log in page will be indicated by the Country flag to the left of the **LOG IN** button.
- b. You can also log in at [login.corrigo.com](https://login.corrigo.com).

### 2. How can I log in to the CorrigoPro Mobile App?

- a. You will need to be added to your company's Cru before you can access Work Orders on a mobile device.
- b. Once you are added to the Cru, download the CorrigoPro Mobile App on your mobile phone from either the App Store on iPhone or the Play Store on Android.
- c. You will sign in to the Mobile App using your name and mobile number only. No username / password is required to sign in to the Mobile App.
- d. CruLeads will see all Work Orders sent to the company in CorrigoPro. CruMembers will only see Work Orders they are assigned.

## INVOICING

**For more in-depth invoice guidance, please review the Invoicing App QRG.**

### 1. Why can't I submit my invoice?

- a. Please ensure that the Work Order is completed before you try to manage / submit your invoice.
- b. Please also ensure all information on your invoice is correct, including: not exceeding the NTE, that the tax is correct, there is no missing information, and that the Invoice Number is a new number that has not yet been used.
- c. If there is an error message at the top of the invoice after you try to submit it, please follow the instructions in the message. If you need further assistance, please contact CorrigoPro Support.

## 2. My invoice shows **Pending Work Order Completion** status. Why can I not submit an invoice?

A CruChat (Work Order) must be in a “Completed” status for you to submit an invoice. You will need to perform the **check-in** and **check-out** steps from the Desktop or Mobile App to start and complete the Work Order. Once completed, you will be able to submit your invoice.

## 3. I still cannot submit my invoice. What are some common issues that I can check?

- a. Do you have a quote in pending quote status? If so, you will want to reach out to your Customer and ask them to approve/reject the quote.
- b. Is the amount you are trying to submit the invoice for greater than the NTE on the Work Order? If so, you will need to reach out to your Customer and ask them to increase the NTE or submit a quote through your CruChat and wait for your Customer to approve the quote.
- c. Was the invoice already submitted?
- d. Are you missing any required information on the invoice?

## 4. My CruChat (Work Order) is complete. How can I create my invoice?

- a. You can access your invoice through the CruChat of the Work Order or by clicking the “Your Invoices Need Attention” tile on the CorrigoPro Desktop homepage.
- b. Once you have opened the invoice, enter the invoice date and number (or use WO#).
- c. You will need to add your items to the electronic invoice by clicking “Please Select” directly below the black bar showing “Category/Item.”
- d. You can add as many items as needed to complete the invoice.
- e. Don’t forget to add Tax (if applicable) in the Tax field along with any attachment (optional).

## 5. How do I get paid and who pays me?

The payment is handled outside of Corrigo. You will be paid directly by your Customer. For questions on when you will get paid, please contact your Customer directly.

## 6. I want to use the Bulk Invoice process to submit my invoices. How do I get started?

- a. We recommend reviewing the video tutorial and PDF “How to Get Paid” on the Support Center homepage for instructions to begin the Bulk Invoice Process.
- b. You can also attend our online training webinar course “CorrigoPro Desktop Invoicing Training” from the Support Center to learn more about Bulk Invoicing.
- c. If you are not able to attend online training webinars, you can review the “CorrigoPro Desktop Invoice Training” under “Training Videos on the Support Center.”
- d. If you still need additional assistance with Bulk Invoicing, please contact CorrigoPro Support.

## BILLING/SUBSCRIPTION FEES

### 1. Are there charges to use CorrigoPro to receive and manage my Work Orders?

There are monthly fees associated with the use of CorrigoPro. These fees are billed to you directly by either a debit/credit card or EFT (from a Checking or Savings account). Please refer to the table below for details of our fee structure.

<b>CONNECTED (Per Work Order Plan)</b>	<b>PRO (Monthly Flat Fee Plan)</b>
\$5 Monthly Membership Fee	\$50 Monthly Membership Fee
\$5 per accepted Work Order	No additional charge for Work Orders received
Primary Smart Zone “Service Area” included with monthly subscription	Primary Smart Zone “Service Area” included with monthly subscription
Each additional Smart Zone “Service Area” billed at \$2.50 monthly	Each additional Smart Zone “Service Area” billed at \$2.50 monthly
1 <sup>st</sup> registered Service included with monthly subscription	1 <sup>st</sup> registered Service included with monthly subscription

Additional Services billed at \$2.50 each monthly	Additional Service billed at \$2.50 each monthly
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## 2. What are the recommended Work Order volumes for each membership level?

The following are the optimal Work Order ranges for the **CONNECTED** and **PRO** membership levels.

- Per Work Order plan (**CONNECTED**) – 9 or less WO each month.
- Monthly Flat Fee plan (**PRO**) – 10 or more WO each month.

Please consider seasonality when determining which membership level is best for your business.

You can view and make changes to your membership at any time by having an Administrator user log in to the CorrigoPro Desktop, then click on the orange “My Corrigo Billing Account” tile to update membership level.

## 3. Why did I not receive my monthly billing receipt? or How can I change the email address where my monthly billing statements are sent?

Please have an administrator email the Corrigo Billing Team at [probilling@corrigo.com](mailto:probilling@corrigo.com).

They will need to provide your Company Name (as shown in CorrigoPro), email address, and Tax ID number to allow our Billing Team to access and update your billing preferences.

## CRUCHATS WORKFLOW AND HOME PAGE NAVIGATION

**For in-depth Workflow guidance, please review the “Managing a Work Order Desktop/Mobile” video & PDF on the homepage of the CorrigoPro Support Center.**

**For in-depth Home Page Navigation guidance, please review the “Manage Your CorrigoPro Desktop Homepage” video & PDF on the homepage of the CorrigoPro Support Center.**

### 1. Why can't I check into my CruChat (Work Order)?

Please ensure you have first accepted the CruChat (Work Order) before you attempt to do any work on the actual CruChat (Work Order).

## 2. How do I Check In / Check Out of a CruChat (Work Order)?

- a. Through the CorrigoPro Mobile App access the CruChat for the Work Order and select “Check In” to start the Work Order and “Check Out” to complete the Work Order.
- b. On a computer, access the CruChat for the Work Order through the Desktop and select “Check In” to start the Work Order and “Check Out” to complete the Work Order. You are not required to be on site to check in or out, unless specified by your Customer.
- c. By using the IVR system (Interactive Voice Response). If your Customer uses IVR, you will see a phone number and code to call on your CruChat (Work Order). If your Customer does not use IVR, you will want to use either of the above-mentioned methods to check in or check out.

## 3. Why can't I find my Work Order (CruChat)?

- a. You may have filter options set preventing you from viewing your Work Orders. To reset filters, click on the filter and select the “Clear Selected” option, then click outside of the filter menu.
- b. If you are still not seeing your Work Order, you will want to confirm the Work Order was “sent” on the Customer’s end. Customers can create Work Orders but not send them.
- c. CruMembers can only see CruChats (Work Orders) that they are added to.

## 4. How can I get a raise on the CruChats (Work Orders) NTE?

You would need to submit a quote within the CruChat of the Work Order by clicking in the message that reads “You cannot invoice us more than \_\_\_\_\_ for this work. **SUBMIT QUOTE** if you need this increased” to submit your quote.

- a. When entering the quote, you may need to itemize the Quote based on your rate card/price list items.
  - i. Below “Category/Item,” you will click **PLEASE SELECT** to display your price list/rate card.

- ii. Enter the appropriate “Description,” “QTY,” “Rate” (if not preset), and Tax. Some Customers/Requestors have tax tables which will allow taxes to be calculated by clicking the **CALCULATE TAX** button.
  - iii. You can add additional items to the Quote by clicking **PLEASE SELECT** on the next line.
  - iv. Once all information is added to complete the Quote, click **SUBMIT** to send the quote to your Customer.
  - v. Once the quote is approved by your Customer, the NTE will be increased.
- b. Some Quotes will only have you enter a total dollar amount for the Quote and add a description to justify the Quote.
- i. Enter the total dollar amount that you will bill for (including tax, if applicable).
  - ii. Add a description for the quote. This is a free entry field for you to add details to justify the Quote. (There is 250-character limit in this field.) If additional documentation is needed attachments can be dragged and dropped within the CruChat of the Work Order.
  - iii. Click **SUBMIT** to send the quote to your Customer.
  - iv. Once the Quote is approved, the NTE will be increased.
  - v. If you realized that the Quote amount that you submitted was not high enough, please ask the Customer to **REJECT** the quote so that you can submit another quote for approval.

## COMPANY PROFILE

### 1. My Company Profile is not at 100%, what issues will I have with receiving bids or Work Orders?

Just because your company profile is not at 100% does not stop you from receiving Work Orders or Bids from potential Clients.

### 2. Will my Customers be able to see my Company when assigning Work Orders even though my profile is not at 100%?



Yes! Once you are listed as a Service Provider by your Customer, they will be able to see you and will be able to send Work Orders to you.

### 3. How do I add to or edit my Company Profile?


- a. Log in to your CorrigoPro Desktop Homepage as an Administrator.
- b. Click the tile “Complete your Company Profile” or “Your Company Profile is Complete.”
- c. This will open your Company Profile. You can make any changes needed from the General, Branches, Contacts, or Document menus by clicking the appropriate icon in the top right corner of the window.

## USER AND CRU MANAGEMENT

### 1. How do I add/delete a user?

- a. To add a Desktop User, click on the  icon at the top of the CorrigoPro home page and select “Invite New Users.” Fill out the New User invitation (Full Name and Email) and click on “Invite.” The new User will receive an email invitation asking them to complete sign up.
- b. To delete a Desktop User, click on the  icon at the top of the CorrigoPro home page and find the User you would like to delete. On their username, click on “EDIT” and choose “Delete.”

### 2. How do I give another desktop user Administrator access?

To change Administrator Access, click on the  icon at the top of the CorrigoPro home page and find the username you would like to change. Click on **EDIT** and check the Administrator box.

### 3. I don't want to input my Cell Phone Number, do I have to do this?

- a. If you are going to be a desktop-only user, you will not need to input a cell phone number, you can use your email address.
- b. If you are going to be a mobile application user, you will need to add your cell phone number.



#### 4. My name is showing up incorrectly or as a different user, can I change my name?

- a. If you are a desktop-only user, you will not be able to change your name. You will have to have a new user profile added with the correct name and a different email address.
- b. If you are a desktop and mobile application user or just a mobile application user, you can change your name on the CorrigoPro Mobile App under the “Settings” menu.

## WORK ORDER STATES

### 1. What do the Work Order States mean?

- a. **Waiting for Acceptance** – This is a new Work Order sent by a Customer that has not been accepted by the assigned Service Provider / Supplier.
- b. **Open** – The Work Order has been accepted by Service Provider / Supplier but has not been started in CorrigoPro indicating work is being performed.
- c. **Open: In Progress** – Work Order has been accepted and started by Service Provider / Supplier in CorrigoPro. Referred to as “Checked In.”
- d. **Open: Paused** – Work Order has been started by Service Provider / Supplier and paused within CorrigoPro (ex. parts ordered, return visit, technician break, etc.).
- e. **Completed** – Work Order has been “checked in” (started) and “checked out” (completed) and is ready to invoice in CorrigoPro (if applicable).
- f. **On Hold** – Customer has initiated a hold on the Work Order usually for approvals or reviews of large expenses. This Work Order state cannot be changed by Service Provider / Supplier until the Customer removes the on-hold state within their Corrigo software.
- g. **Recalled** – Work Order was cancelled by Customer. No further actions can be done within Work Order by Service Provider / Supplier. Messages cannot be sent within Work Order.
- h. **Rejected** – Initiated by Service Provider / Supplier. This has been indicated to the Customer that the Service Provider / Supplier will not be completing Work Order. The Work Order can only be reissued by having the Customer reissue it. Messages cannot be sent within the Work Order in this state.

- i. **Require Completion Details** – Work Order was completed either by Bulk Complete progress or by a technician using the IVR phone system. Work Order Completion Notes and Repair Category and COD will need to be added in the CruChat to move Work Order into Completed state.

## CONNECTION ISSUES

### 1. I have more than one CorrigoPro Account, how can I combine both Accounts?

You will need to work with the Connection team to combine both accounts into one.  
800-517-2629 option 1 or [connect@Corrigo.com](mailto:connect@Corrigo.com)

### 2. I am having trouble getting Connected to the CorrigoPro Network and/or my Customers. Who can I contact to get this resolved?

Please contact the Connection team for all Connection issues.  
800-517-2629 option 1 or [connect@corrigo.com](mailto:connect@corrigo.com)

### 3. I am receiving an error on CorrigoPro's website that states "Oops you don't have a company," what is causing this?

Please make sure that you are logging into the correct login region page. Please make sure the Country Flag at the top right is the correct Country.

- i. [For Service Providers/Vendors in North America, you should log in using this link.](#)

## ACCESS ISSUES

### 1. I forgot my password / login ID.

- a. On [corrigo.login.com](http://corrigo.login.com) there is a [Forgot Your Password](#) link. Please click this link to enter your email address to reset your password.
- b. If you forget the email address used, email our Support team at [support@corrigo.com](mailto:support@corrigo.com)

## 2. The email I'm trying to use for my account is no longer active? Or I forgot which email was used and I cannot login? Or how can I change the email address on my account?

- a. Contact your Company Administrator and have them add / edit your User Profile.  
You cannot edit an existing email on a profile, so you may need to delete the old profile and add as a new user.
- b. If you are still having issues, please contact the Customer Support team at 800-517-2629 option 2 or [Support@Corrigopro.com](mailto:Support@Corrigopro.com).  
You will need to verify your account information. In order to do so, please make sure you have the following information:
  1. Tax ID
  2. Debit/Credit Card or EFT payment method for Corrigo Billing (last 4 digits of account number will be used for verification)

## CONTACTING SUPPORT

### 1. Can you please complete some steps of my Work Order so I can Check Out / get paid?

Although Support is very happy to help guide you in the right direction to ensure you can easily maneuver through your CruChats (Work Orders) and process your invoices, Support cannot approve a quote, extend an SLA, or check up on payment statuses. Please contact your Customer directly for those issues.

### 2. Can you Check me in/out of a Work Order?

Unfortunately, no. Checking in and out of the Work Order is done by the Service Provider either through IVR, the desktop application, or by using the mobile app.

### 3. I have more questions, who can I contact?

- a. **CorrigoPro Support:** 800-517-2629 option 2 or [support@corrigopro.com](mailto:support@corrigopro.com)  
Miscellaneous issues / troubleshooting.
- b. **Connection Team:** 800-517-2629 option 1 or [connect@corrigo.com](mailto:connect@corrigo.com)  
US/CAN Vendor connection questions.

- c. **Visit the Support Center:** <https://help.corrigopro.com> or click the blue “Corrigo Learning Center tile from the CorrigoPro Desktop homepage.