

# Quick Reference Guide

## Manage Your Team Within CorrigoPro


*The purpose of this document is to cover managing your CorrigoPro Desktop users, User Email Notifications, Advanced Administrator Settings, Cru, Subcontractors and Non-Connected Customers*

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## Adding a User to the CorrigoPro Desktop

**Note: You can add as many desktop users as you need for your company. Only Administrator Users can add, remove or edit Desktop Users. Any Desktop user can also download and use the Mobile App.**

1. Login to the CorrigoPro Desktop.
2. Click the  icon to access User Management.
3. Click on “Invite New User.”
4. Enter the new User’s full name and email address. Click the checkbox if you want the User to be an Administrator.

**Note: “Administrators” have full access to all features and functions within the CorrigoPro Desktop. Users who are not designated as “Administrators” have access to ONLY manage work order details. Any User(s) who need submit quotes or invoicing access will need to be designated as an “Administrator.”**

5. Click “Invite” to complete. The User will receive an email with instructions to complete their registration and sign-in to their CorrigoPro account.
6. The new User will then sign in, click the tile showing “Click HERE to configure your account” to complete a one-time name and phone number confirmation.
  - a. If the User will only use the Desktop App, they only need to enter their name, then click “Join the Cru”
  - b. If the User wants to also use the Mobile App, they can enter their mobile number then click “Join the Cru”. This will begin the setup process to enable the Mobile App by sending a text message to their phone with instructions to download the Mobile App.

**Note – Mobile App users can be added at anytime by following the “Our Cru” instructions shown later in this document**

## User Management

**INVITE NEW USER**

NAME	EMAIL	STATUS	ACTION
Loren Webster	lorenw@corrigo.com	Registered	<b>EDIT</b>
Loren Webster	lwebster0709@gmail.com	Registered	<b>EDIT</b>
Test User	loren.webster@am.jll.com	Invited	<b>EDIT</b>

**BACK**

## Invite New User

FULL NAME

EMAIL


☐ Administrator

**BACK**

**INVITE**

## Editing/Deleting an existing Desktop User

You can edit the access level for an existing Desktop User by following the steps below:

1. Click the  icon to access User Management.
2. Click the "Edit" icon to the right of the User you wish to modify.
3. Click the checkbox to add or remove Administrator rights.

4. If needed, you can delete User access. Deleting a User will remove all access for the User to login to the CorrigoPro Desktop.

### User Management

INVITE NEW USER

NAME	EMAIL	STATUS	ACTION
Loren Webster	lorenw@corrigo.com	Registered	EDIT
Loren Webster	lwebster0709@gmail.com	Registered	EDIT
Test User	loren.webster@am.jll.com	Invited	EDIT

BACK

### Edit User

FULL NAME

Loren Webster

EMAIL

lwebster0709@gmail.com

☐ Administrator


DELETE


BACK

SAVE

## Managing Email and Pop-Up Notifications for Users

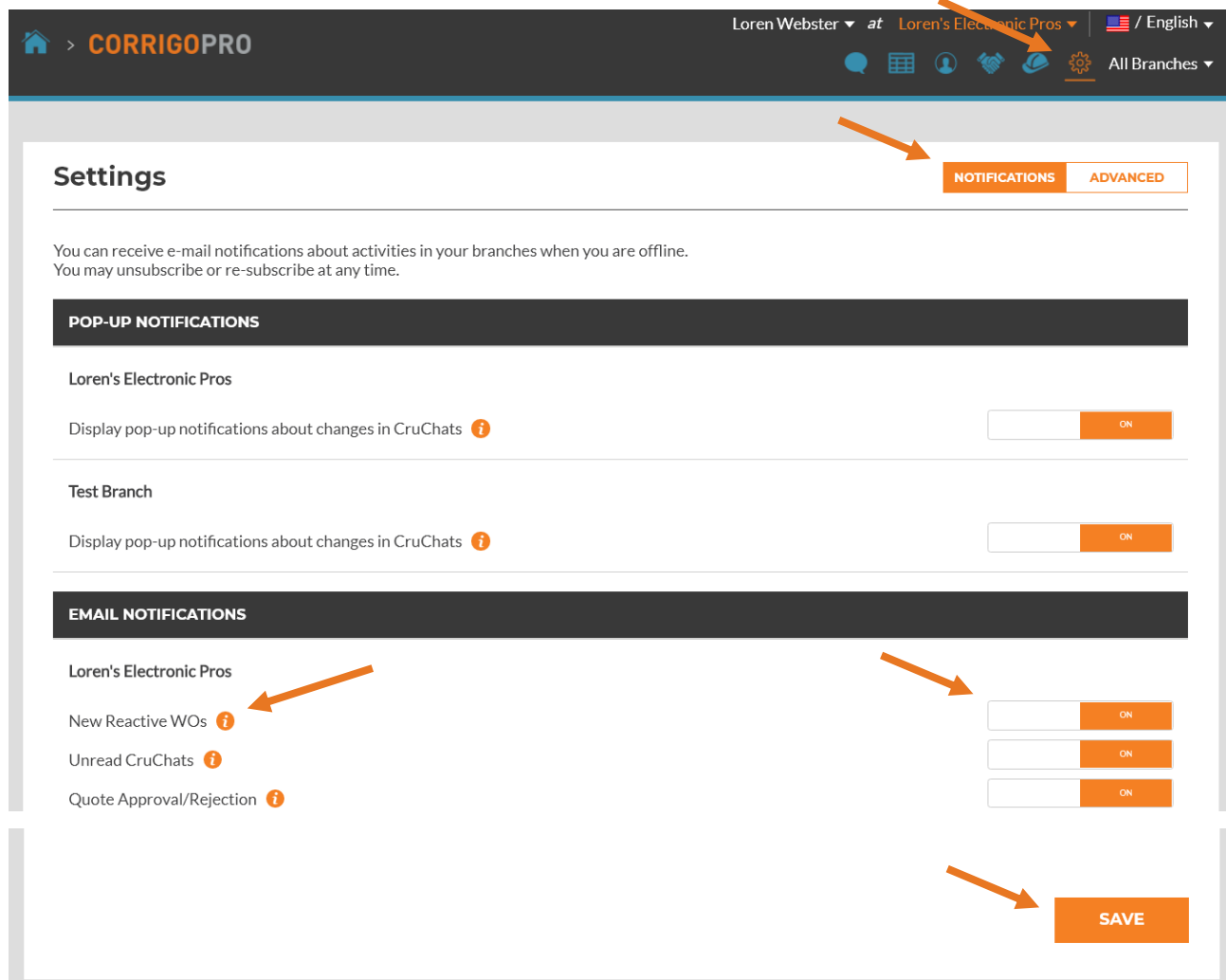
Individual Users can control email and pop-up notifications received from CorrigoPro by following the steps below:

1. Click the “CorrigoPro Work Order Tile” from the desktop homepage.
2. Click the  icon to open the “Settings” menu.

3. Within the “Notifications” tab there are options to enable or disable pop-up and email notifications.
4. Move the slider bar to enable or disable the notification. Hover over the  icon to get a description of each alert.
5. Click “Save” to update.

**Note: Any updates made with the User notifications will reflect on the Administrator view.**

**Changes made within the Administrator view will reflect on the User view.**




Settings


You can receive e-mail notifications about activities in your branches when you are offline. You may unsubscribe or re-subscribe at any time.

**POP-UP NOTIFICATIONS**

Loren's Electronic Pros


Display pop-up notifications about changes in CruChats  ☐ ON


Test Branch


Display pop-up notifications about changes in CruChats  ☐ ON

**EMAIL NOTIFICATIONS**

Loren's Electronic Pros

New Reactive WOs  ☐ ON

Unread CruChats  ☐ ON

Quote Approval/Rejection  ☐ ON

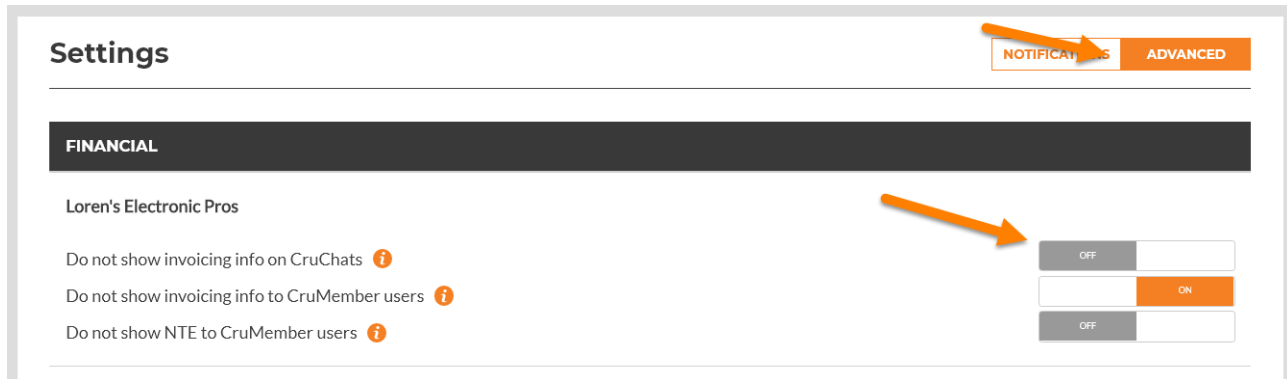
SAVE

## Advanced Settings (Administrators)

There are Advanced Settings that can only be adjusted by CorrigoPro Desktop Administrator Users.

## Financial Settings

- **Do not show Invoicing info on CruChats** – If this option is enabled, the option to invoice will not appear in CruChats. Invoicing can only be accessed from the CorrigoPro Desktop home page.
- **Do not show Invoicing info to CruMember Users** – If this option is enabled, any user designated as a “CruMember” User will not see any invoicing details within the CruChat.
- **Do not show NTE to CruMember Users** – If this option is enabled, NTE (not to exceed) amount will not be shown to CruMember Users. CruMembers also will not be able to submit quotes.





**Settings**


NOTIFICATIONS ADVANCED

**FINANCIAL**

Loren's Electronic Pros

Do not show invoicing info on CruChats 

Do not show invoicing info to CruMember users 

Do not show NTE to CruMember users 


OFF ON OFF


## Work Order Flow

- **Capture Customer signatures** – If this option is enabled, CorrigoPro Mobile app Users will be able to capture signatures for the Work Order on their mobile phone.
- **Visit work order autocompletion** – If this option is enabled, Visit Work Orders will be automatically completed once pre-calculated number of visits are completed within the Work Order
- **Allow CruMember Users to delete documents** – If this option is enabled, CruMember users will be able to delete documents within the CruChat. By default, CruMembers will not be able to delete documents.

## WORK ORDER FLOW

### Loren's Electronic Pros

Capture customer signatures 


Visit work order autocompletion 

Allow CruMember users to delete documents 

OFF	<input type="checkbox"/>
<input type="checkbox"/>	ON
OFF	<input type="checkbox"/>

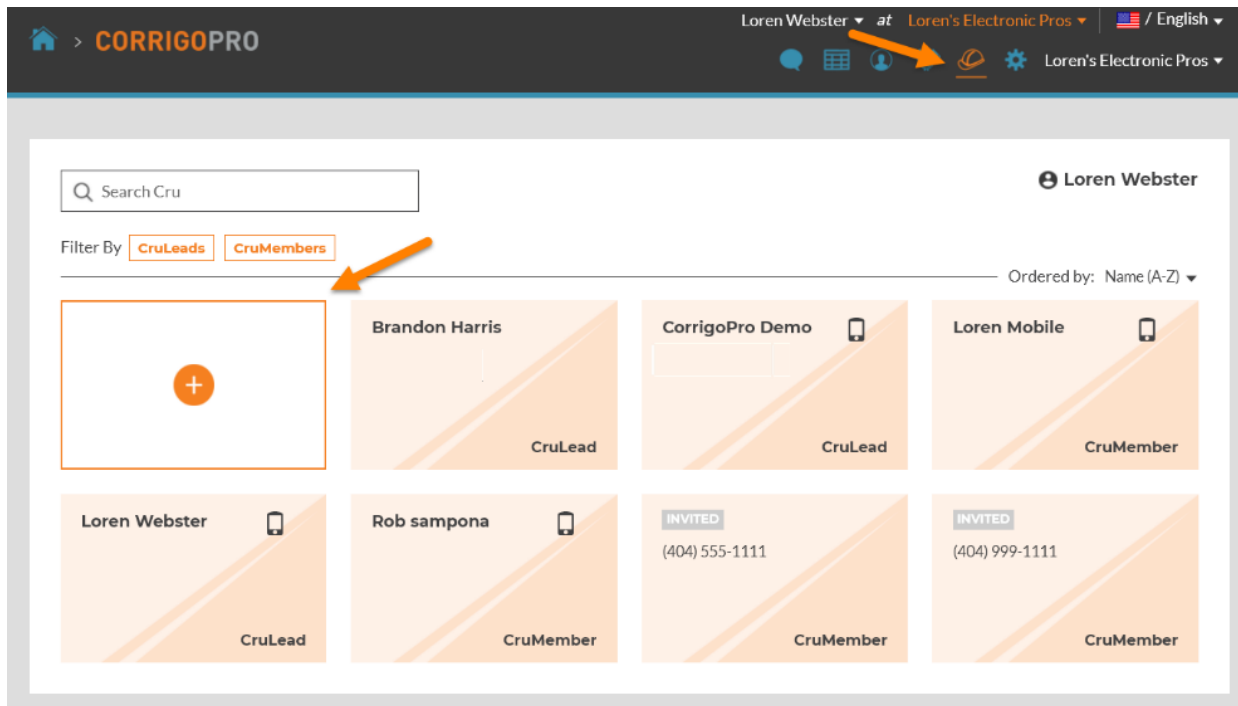
## Our Cru

Administrators can view and manage their Cru Users. Cru Users who need mobile access can be added by following the steps below:

1. Click the  icon.
2. Click the box with “+” symbol.
3. Enter the user’s mobile number.
4. Click the checkbox to designate the user as a “CruLead.”

**Note:** CruLead’s will have access to all Work Orders by default. CruMembers will only have access to Work Orders they are added to by a CruLead.

5. Click “Invite.” This will send a text message to the User’s phone with instructions to download the CorrigoPro Mobile app. Once the User has signed into the mobile app, they will appear with a “phone” icon.



You can also manage one or more Cru User by clicking the icon cards with the User's name.

**Invited Users are not signed into the mobile app. They will need to sign in before you are able to manage them.**



- CruChat – Allows you to create a non-Work Order CruChat communication with your CorrigoPro Users and Cru.
- Reinvite – Sends a reminder text to a mobile User to download the CorrigoPro Mobile app.
- Change Role – Allows you to change a desktop / mobile User's role.

**Note: You can only change roles for one User at a time**


- Delete – Removes the User from your Cru and removes them from any CruChat's they previously had accessed.

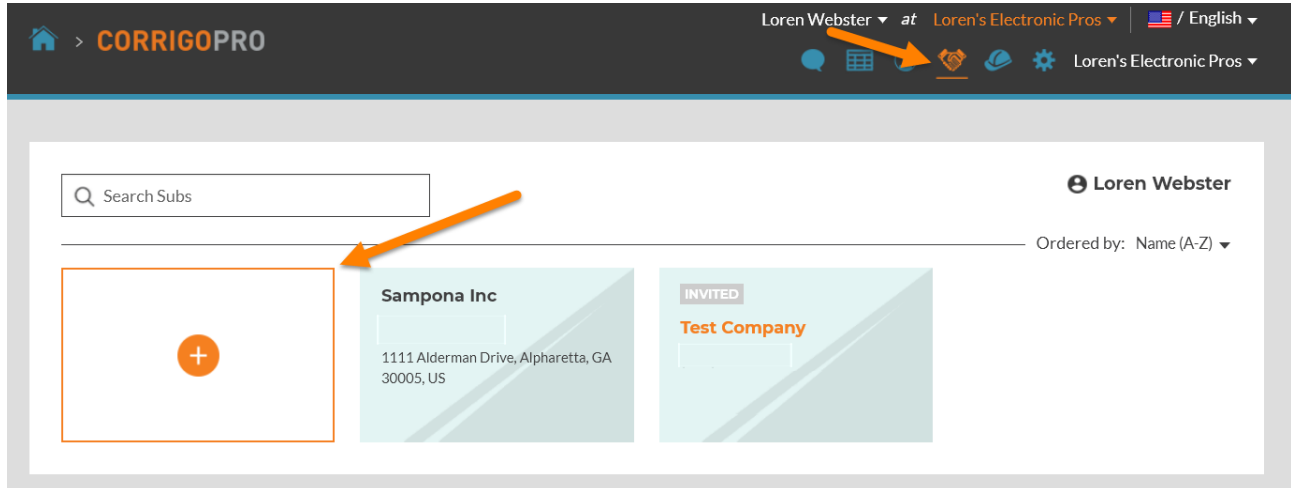


## Our Subcontractors

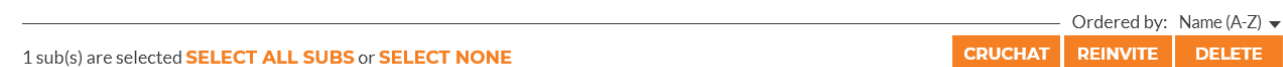
You can add and invite your Subcontractors to join you on CorrigoPro to manage Work Orders.

**Note: Subcontractors are required to complete the CorrigoPro registration process. They will need to select the “Connected” Work Order plan and provide either a credit / debit card or EFT payment to complete registration. However, they are NOT charged for the Work Orders you assign to them. The only time they are charged for Work Orders is if they connect with other Customers within the Corrigo network.**

1. Click the  icon.
2. Click the box with the “+” symbol.
3. Fill in the company name and phone number then click “Search.”
4. The system will search to locate if the Subcontractor is currently enrolled in the CorrigoPro Network. If the Subcontractor is enrolled in our network, you can click “Connect” to add them. If not, you can invite them to join.



You can manage your Subcontractors by clicking on one or more individual subcontractor cards.



- CruChats – Starts a non-Work Order CruChat communication with the Subcontractor. You can also add your Cru Users to these communications.
- Reinvite – Sends a reminder text message or email to the Subcontractor to join the CorrigoPro network.
- Delete – Removes the Subcontractor from your network. They will also be removed from any CruChats.

**Note: Subcontractors will not have access to any financial details within Work Orders.**


## Our Customers

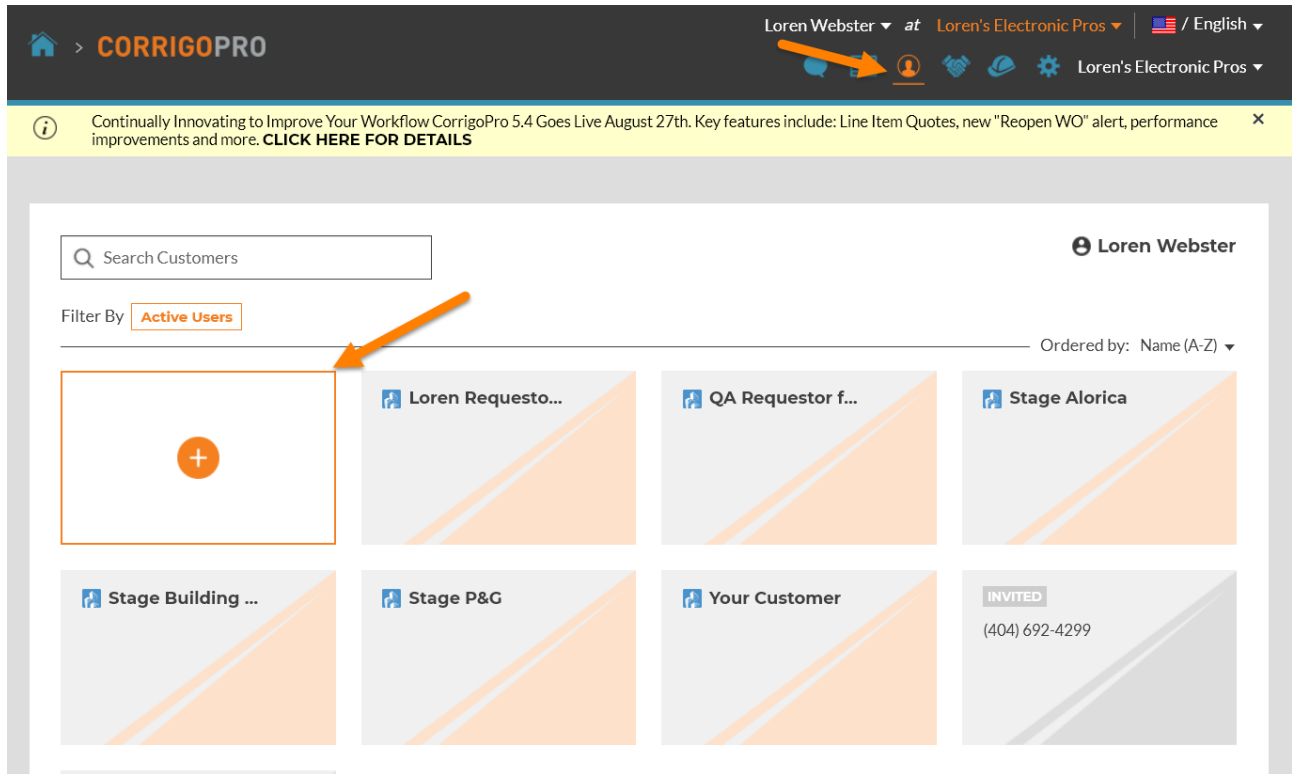
You can invite your Customers / Clients who are not using Corrigo to send you work requests.

Existing connected Corrigo Customers / Clients will appear here as well.

**Note: You will only see Corrigo Customers / Clients here after you receive your first Work Order from them. If you are not seeing a Customer you believe you are connected to, please check the Scoring tile on the desktop or reach out to our Connection Team at [connect@corrigo.com](mailto:connect@corrigo.com).**

To invite a non-Corrigo customer, please follow the steps below:

1. Click the  icon.
2. Click the box with the “+” symbol.
3. Enter a mobile number for the Customer, then click “Invite.”
4. The Customer will receive a text message explaining how they can send work requests using Corrigo.



Need additional assistance?

Contact CorrigoPro Support at 1-800-517-2629

or [support@corrigo.com](mailto:support@corrigo.com)