



**CORRIGOPRO**

# Connecting with CorrigoPro

Managing Tiles and Creating Connections

# During this tutorial we will cover...

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- Logging into CorrigoPro Desktop
- The Company Profile tile
- Creating your free ad (promo)
- Editing your services
- Smart Zones
- The Membership tile
- The CorrigoPro tile
- Settings and email notifications
- Our Cru
- CruMembers and CruLeads
- Our Subs
- Our Customers
- CruChats

# Log into Your CorrigoPro Desktop

CorrigoPro Desktop login page URL- <https://login.corrigo.com/connect/login>

**CORRIGOPRO**  
DESKTOP

James Favreau ▾

Log into your CorrigoPro Desktop using the email address and password you set up during registration

EMAIL test@Corrigo.com

PASSWORD ●●●●●

REMEMBER ME

**LOGIN**

[FORGOT YOUR PASSWORD?](#)

Click “LOGIN”

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# Your CorrigoPro Desktop

Logging in, you will arrive at the CorrigoPro Desktop

The screenshot displays the CorrigoPro Desktop interface. At the top, the user is logged in as 'Waldo David' for 'David's HVAC'. The dashboard features several tiles:

- Training Tile:** Promotes online training with the text 'SIGN UP FOR ONLINE TRAINING!' and a 'Choose Classes & Register Now' button.
- Company Profile Tile:** Shows 'CORRIGOPRO David's HVAC' and states 'CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE'.
- Billing Account Tile:** Labeled 'MY CORRIGO BILLING ACCOUNT' with a wallet icon.
- Unread Messages:** Lists messages from 'APAC PRO' regarding a quote request and an invoice submission.
- Invoices Tile:** Titled 'YOUR INVOICES NEED ATTENTION', showing 33 ready-to-be-invoiced WOs, 25 draft invoices, and 1 disputed invoice.
- Score Tile:** Displays '85 your average score' and '2 customers are connected to you'.
- Learn About Tile:** Promotes 'CORRIGOPRO DIRECT' with a puzzle piece graphic.

Each of the tiles, when clicked on, will bring you to a specific section of the CorrigoPro Desktop  
Invoice tile only displayed for "ADMIN" users

# The Company Profile Tile

The screenshot displays the CORRIGOPRO desktop interface. At the top left, the logo 'CORRIGOPRO' is shown above the word 'DESKTOP'. At the top right, the user name 'James Favreau' is displayed next to a dropdown arrow, and there are icons for home, user profile, and settings. The main content area features several tiles:

- Alert Tile:** A dark grey tile with the CORRIGOPRO logo and the text 'ALERT: EVERY WORK ORDER REQUIRES CHECK IN AND CHECK OUT'. A button below reads 'Learn about adding your team to CorriGoPro >'. This tile is highlighted with a green border.
- Complete your Company Profile Tile:** A white tile with a green border. It features a circular progress indicator showing 'now at 71%'. Text reads 'Completed Company Profile:'. Below this are two checkmarks: 'Improves your public appearance' and 'Gets you more work'. A box labeled 'Your Company Logo' is shown with a mouse cursor pointing at it. An information icon is in the top right corner.
- MY CORRIGO BILLING ACCOUNT Tile:** An orange tile with a white icon of a wallet and the text 'MY CORRIGO BILLING ACCOUNT'. An information icon is in the top right corner.
- Connect to Your Customers Tile:** A white tile with the CORRIGOPRO logo and the text 'Connect to Your Customers. Stay Connected Anywhere.' Below the text is a photo of two workers in hard hats.

At the bottom left, there is a blue square icon of a person wearing a headset. To the right of this icon, the following text is displayed:


Let's look at the Company Profile tile  
Click on the tile to access your Company Profile

# Managing Your Company Profile

Here you will be able to add a company logo and change your company name

Click on “EDIT” in the Business Overview section to enter details of the services your company provides

To enter or edit your physical location and contact information, click on “EDIT BRANCH INFO”



Canada Test Pro

[CHANGE COMPANY LOGO](#) [CHANGE COMPANY NAME](#)

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**Business Overview** [EDIT](#)

Multi-service provider. Going above and beyond to address any and all of our customers' needs.

**TAXPAYER IDENTIFICATION NUMBER (TIN)** \*\*\*\*\*255 [EDIT](#)  
[WHAT IS A TIN NUMBER](#)

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**Branches** [EDIT BRANCH INFO](#)

**PROMO** [CREATE YOUR FREE AD](#)

PHONE

EMAIL

FAX

WEB SITE

ADDRESS

**SERVICES** Electrical [EDIT](#)

**SMART ZONES** Western Australia [EDIT](#)

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[HOW DO I ADD ANOTHER BRANCH?](#)

# Managing Your Company Profile

Here, you can edit your company phone number, email, website, and physical address details

These details will be visible to your connected customers, and this email will be listed as your general email for each of these customers

## Edit Branch Info

×

NAME	Canada Test Pro
PHONE	<input type="text" value="450-555-0123"/>
EMAIL	<input type="text" value="test@Corrigo.com"/>
FAX	<input type="text"/>
WEB SITE	<input type="text" value="www.companywebsite.com"/>
STREET	<input type="text" value="123 West Maple St. Suite 100"/>
STREET 2	<input type="text"/>
CITY	<input type="text" value="Montreal"/>
COUNTRY ?	Australia
STATE	<input type="text" value="Quebec"/>
POSTAL CODE	<input type="text" value="H1A 5C2"/>

Click "SAVE"

CANCEL

SAVE

# PROMO / Create Your Free Ad

By clicking on the “CREATE YOUR FREE AD” link, the Create Promo window will appear

## Branches

[EDIT BRANCH INFO](#)

PROMO	<a href="#">CREATE YOUR FREE AD</a>
PHONE	+1 404-565-4964
EMAIL	jamesf@corrigo.com
FAX	
WEB SITE	
ADDRESS	123 TEST, TEST, WA, AU, 6006
SERVICES	Electrical <a href="#">EDIT</a>
SMART ZONES	Western Australia <a href="#">EDIT</a>

You may use up to 71 characters to display a promotional offer

Click “SAVE” to post your PROMO

You can return to your Company Profile page to update or remove your PROMO at any time



# Editing Your Services

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In the SERVICES section, select the specific service or services that your company provides

Your selections help current and potential clients find you in Corrigo

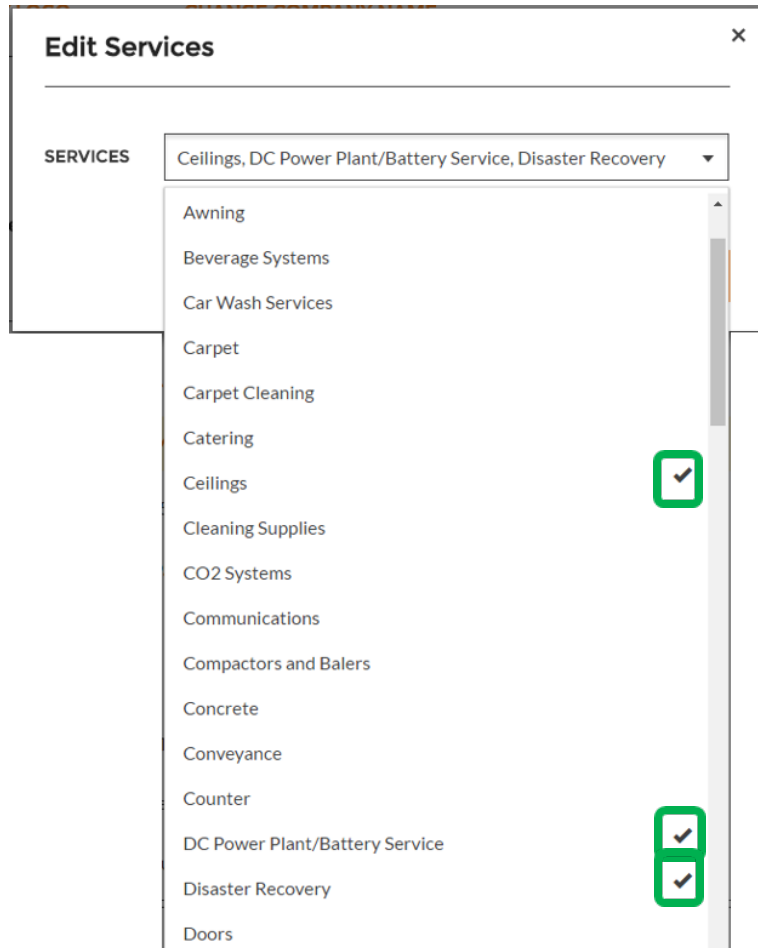
Click on the “EDIT” button and the Edit Services window will appear

## Branches

### EDIT BRANCH INFO

PROMO	CREATE YOUR FREE AD
PHONE	+1 450-555-0123
EMAIL	cap2nine@gmail.com
FAX	
WEB SITE	
ADDRESS	123 TEST, TEST, WA, AU, 6006
SERVICES	Disaster Recovery 
SMART ZONES	Western Australia 

# Editing Your Services



**Edit Services** [X]

**SERVICES** Ceilings, DC Power Plant/Battery Service, Disaster Recovery [v]

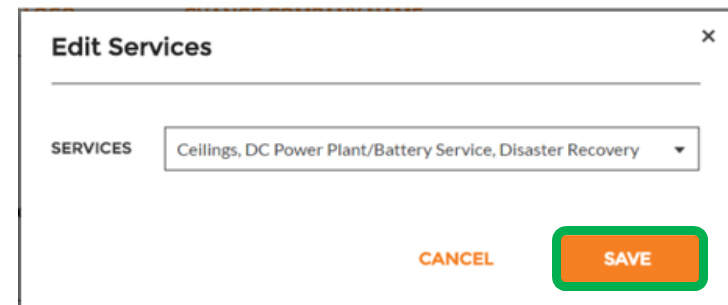
- Awning
- Beverage Systems
- Car Wash Services
- Carpet
- Carpet Cleaning
- Catering
- Ceilings
- Cleaning Supplies
- CO2 Systems
- Communications
- Compactors and Balers
- Concrete
- Conveyance
- Counter
- DC Power Plant/Battery Service
- Disaster Recovery
- Doors

Click on the drop down arrow in the “SERVICES” box to view all available services

Place a check to the right of the service you provide

Be sure to select only the services that your company provides as customers will use this information when searching for service providers on the CorrigoPro network

Once you have completed your company’s service selections, click “SAVE”



**Edit Services** [X]

**SERVICES** Ceilings, DC Power Plant/Battery Service, Disaster Recovery [v]

CANCEL **SAVE**

# Select Your Smart Zones

Selecting the correct Smart Zone coverage will ensure your company is visible to customers searching for the services you provide, in the areas where needed

Smart Zones are pre-defined geographic areas

Please be sure to select the Smart Zones that match your area of service

To review and edit your Smart Zones, click on the “EDIT” button in the Smart Zones row

This will bring you to the Smart Zones information screen

## Branches

[EDIT BRANCH INFO](#)

PROMO

[CREATE YOUR FREE AD](#)

PHONE

+1 404-565-4964

EMAIL

jamesf@corrigo.com

FAX

WEB SITE

ADDRESS

123 TEST, TEST, WA, AU, 6006

SERVICES

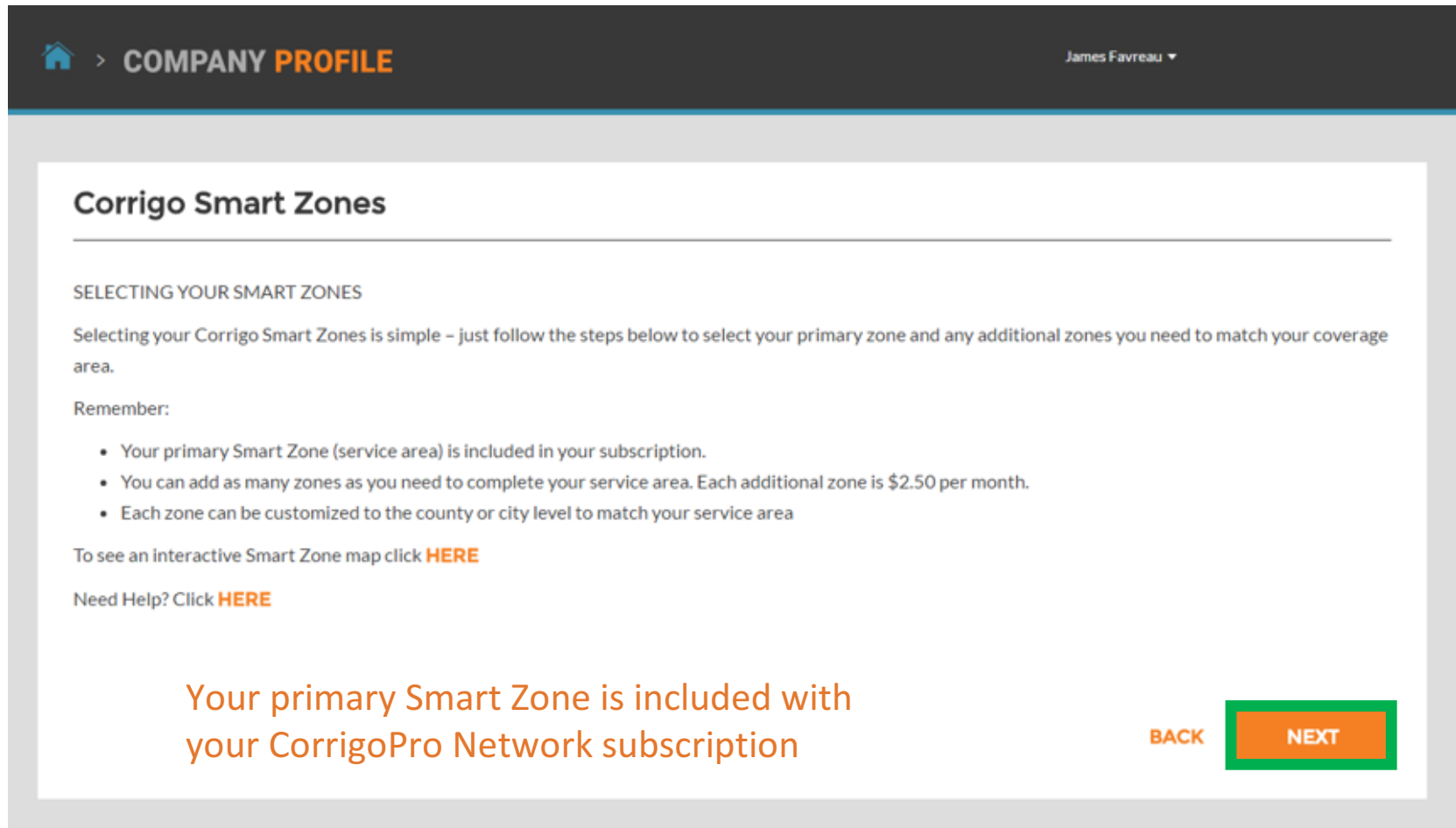
Electrical [EDIT](#)

SMART ZONES

Western Australia

[EDIT](#)

# Select Your Smart Zones



The screenshot shows a web application interface for selecting smart zones. At the top, there is a dark navigation bar with a home icon, a breadcrumb trail '> COMPANY PROFILE', and a user name 'James Favreau' with a dropdown arrow. Below this is a white content area with the title 'Corrigo Smart Zones' and a horizontal line. The main text reads: 'SELECTING YOUR SMART ZONES' followed by 'Selecting your Corrigo Smart Zones is simple - just follow the steps below to select your primary zone and any additional zones you need to match your coverage area.' Below this is a 'Remember:' section with a bulleted list: 'Your primary Smart Zone (service area) is included in your subscription.', 'You can add as many zones as you need to complete your service area. Each additional zone is \$2.50 per month.', and 'Each zone can be customized to the county or city level to match your service area'. There are two links: 'To see an interactive Smart Zone map click [HERE](#)' and 'Need Help? Click [HERE](#)'. At the bottom, there is a large orange text block: 'Your primary Smart Zone is included with your CorrigoPro Network subscription'. To the right of this text are two buttons: a 'BACK' button and a 'NEXT' button. The 'NEXT' button is highlighted with a green border.

COMPANY PROFILE James Favreau

## Corrigo Smart Zones

SELECTING YOUR SMART ZONES

Selecting your Corrigo Smart Zones is simple - just follow the steps below to select your primary zone and any additional zones you need to match your coverage area.

Remember:

- Your primary Smart Zone (service area) is included in your subscription.
- You can add as many zones as you need to complete your service area. Each additional zone is \$2.50 per month.
- Each zone can be customized to the county or city level to match your service area

To see an interactive Smart Zone map click [HERE](#)


Need Help? Click [HERE](#)

Your primary Smart Zone is included with your CorrigoPro Network subscription

BACK NEXT


Click "NEXT" to access the Smart Zones list

# Select Your Smart Zones

 > **COMPANY PROFILE** James Favreau ▾

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## Set-Up Smart Zones

Country  

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland
  - Aguathuna
  - Anchor Point
  - Aquaforte
  - Arnolds Cove
  - Aspen Cove
  - Avondale
  - Badger
  - Badgers Quay
  - Baie Verte

By clicking on the *plus* symbol to the left of any state, province or territory, you can drill down to specific cities and townships within the Smart Zone

Click the checkboxes beside all the areas in which you provide service

Click "NEXT" BACK NEXT



# Select Your Smart Zones

You will be prompted to confirm your Smart Zone selections

The screenshot shows a web interface for 'Corrigo Smart Zone Summary'. At the top left, there is a home icon and the text '> COMPANY PROFILE'. At the top right, the user's name 'James Favreau' is displayed with a dropdown arrow. The main content area has a title 'Corrigo Smart Zone Summary' followed by a horizontal line. Below the line, it states 'You selected 2 Smart Zone(s)'. Under the heading 'Canada', there is a bulleted list: '• Manitoba' and '• Newfoundland'. A note below the list says 'Your primary zone is included with your subscription plan.' At the bottom of the content area, there is a prompt: 'Click the 'I Agree' button below to confirm your selection and complete your Smart Zone set-up process.' In the bottom right corner of the content area, there are two buttons: 'BACK' and 'I AGREE'. The 'I AGREE' button is highlighted with a green border.

Home > COMPANY PROFILE James Favreau ▾

## Corrigo Smart Zone Summary

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You selected 2 Smart Zone(s)

**Canada**

- Manitoba
- Newfoundland

Your primary zone is included with your subscription plan.

Click the 'I Agree' button below to confirm your selection and complete your Smart Zone set-up process.

BACK I AGREE

# Returning To The CorrigoPro Desktop

With your Smart Zones selected, your Company Profile is now complete!

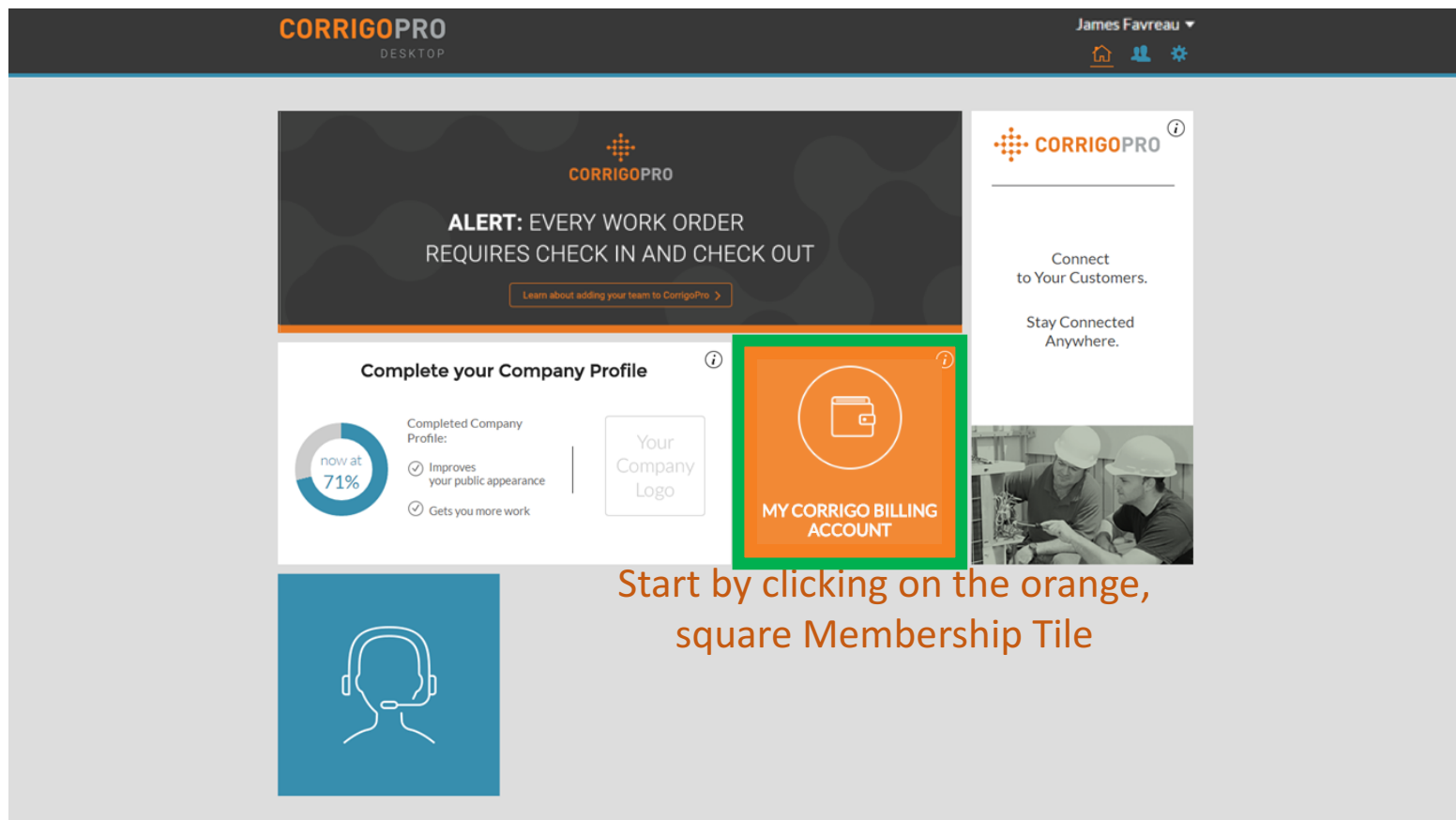
The screenshot displays the 'Company Profile' page in the CorrigoPro desktop interface. At the top, there is a navigation bar with a home icon (highlighted with a green box) and the text 'COMPANY PROFILE'. The user's name 'James Favreau' is visible in the top right corner. The main content area is titled 'Company Profile' and features the CorrigoPro logo and the company name 'Canada Test Pro'. Below the logo, there are two links: 'CHANGE COMPANY LOGO' and 'CHANGE COMPANY NAME'. The 'Business Overview' section includes an 'EDIT' link and a description: 'Multi-service provider. Going above and beyond to address any and all of our customers' needs.' The 'TAXPAYER IDENTIFICATION NUMBER (TIN)' is shown as '\*\*\*\*\*255' with an 'EDIT' link and a link to 'WHAT IS A TIN NUMBER'. The 'Branches' section has an 'EDIT BRANCH INFO' link and a table with contact information:

PROMO	CREATE YOUR FREE AD
PHONE	+1 404-565-4964
EMAIL	jamesf@corrigo.com
FAX	

You can return to the CorrigoPro Desktop, from any tile, by clicking on the blue “Home” icon at the top of the page

# The Membership Tile

Within the Membership tile, you can view your membership details, update your payment method, and review or print your CorrigoPro monthly subscription statements



The screenshot displays the CorrigoPro desktop interface. At the top, the logo 'CORRIGOPRO DESKTOP' is on the left, and the user name 'James Favreau' with navigation icons is on the right. The main content area features several tiles:


- Alert Tile:** A dark grey tile with the CorrigoPro logo and the text 'ALERT: EVERY WORK ORDER REQUIRES CHECK IN AND CHECK OUT'. A link below reads 'Learn about adding your team to CorrigoPro >'. This tile is highlighted with a green border.
- Complete your Company Profile Tile:** A white tile with a circular progress indicator showing 'now at 71%'. It lists benefits: 'Improves your public appearance' and 'Gets you more work'. A placeholder for 'Your Company Logo' is also present.
- Membership Tile:** An orange square tile with a white wallet icon and the text 'MY CORRIGO BILLING ACCOUNT'. This tile is highlighted with a green border.
- Connect to Your Customers Tile:** A white tile with the text 'Connect to Your Customers. Stay Connected Anywhere.' and a photo of two workers in hard hats.
- Support Tile:** A blue square tile with a white headset icon.

Below the tiles, a text overlay reads: 'Start by clicking on the orange, square Membership Tile'.



# The Membership Tile

The screenshot displays the 'MEMBERSHIP DETAILS' page. At the top left, there is a blue 'Home' icon and the text '> MEMBERSHIP DETAILS'. At the top right, the user's name 'James Favreau' is shown with a dropdown arrow. The main content area is titled 'Company Membership Details' and contains a table with the following information:

 STANDARD	MEMBERSHIP LEVEL	Standard	<a href="#">VIEW / CHANGE</a>
	PAYMENT METHOD	Credit Card	<a href="#">VIEW / CHANGE</a>
	EMAIL MY INVOICES	Yes	<a href="#">CHANGE</a>

Below the table is a section titled 'Billing History (last 12 months)'. It features a table with the following header:

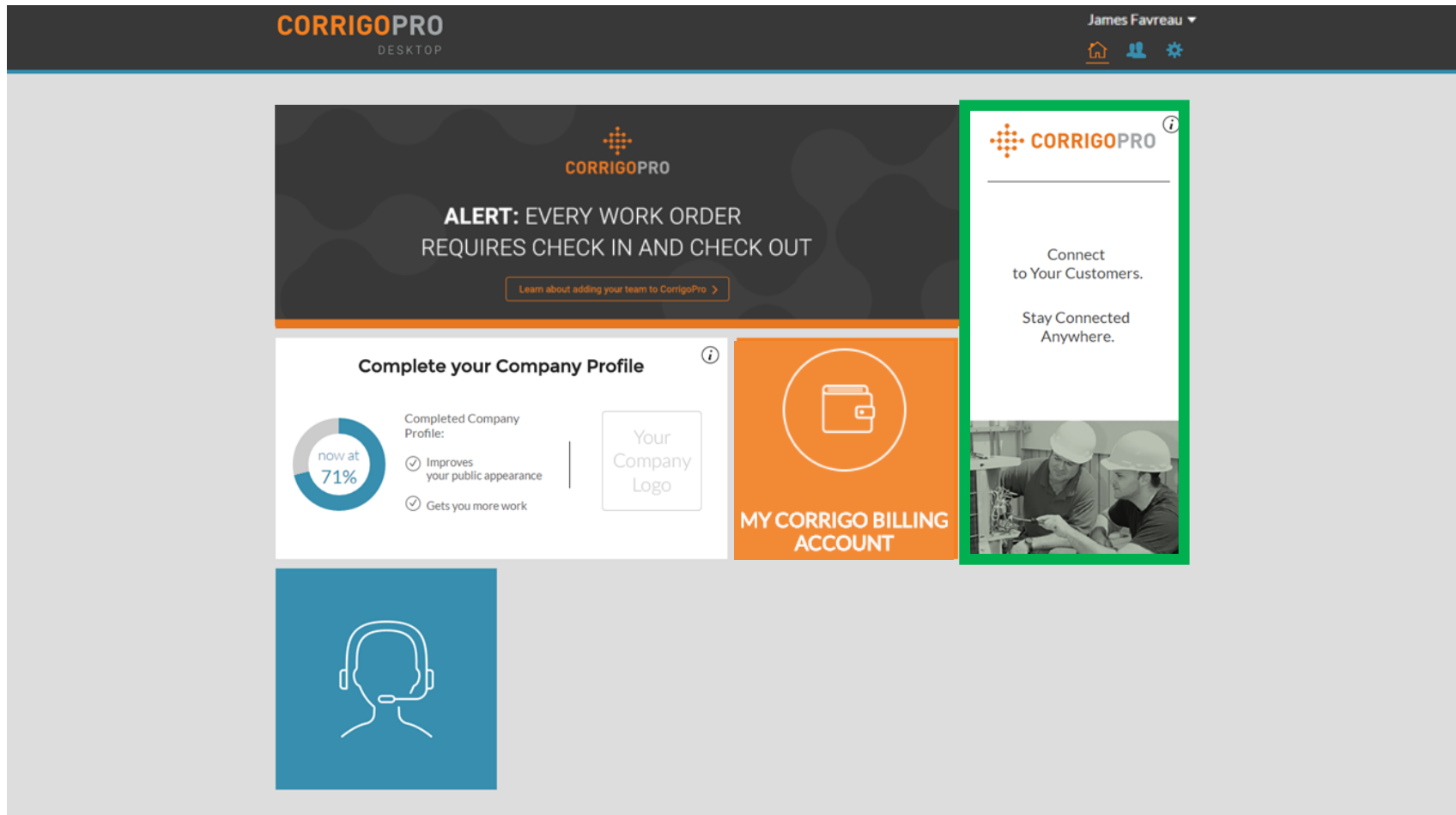
DATE	AMOUNT	ACTION
------	--------	--------

The table body contains the text 'No billing history to display'.

Click on the corresponding link to review or update your membership level, payment method details, and membership invoice email preferences

As always, the blue “Home” icon will return you to your CorrigoPro Desktop

# The CorrigoPro Tile



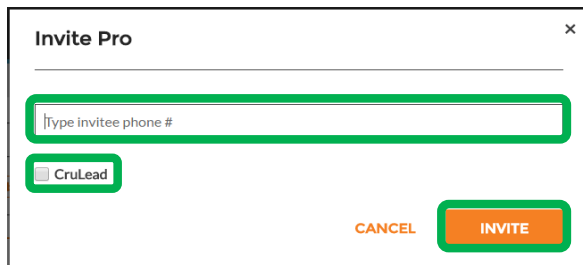
To access the CorrigoPro portal from your desktop, click on the CorrigoPro tile at the right of the screen

# Our Cru

From the Our Cru page you will see all of your invited and connected internal employees

To invite a new CruMember click on the large, white box with the *plus* symbol

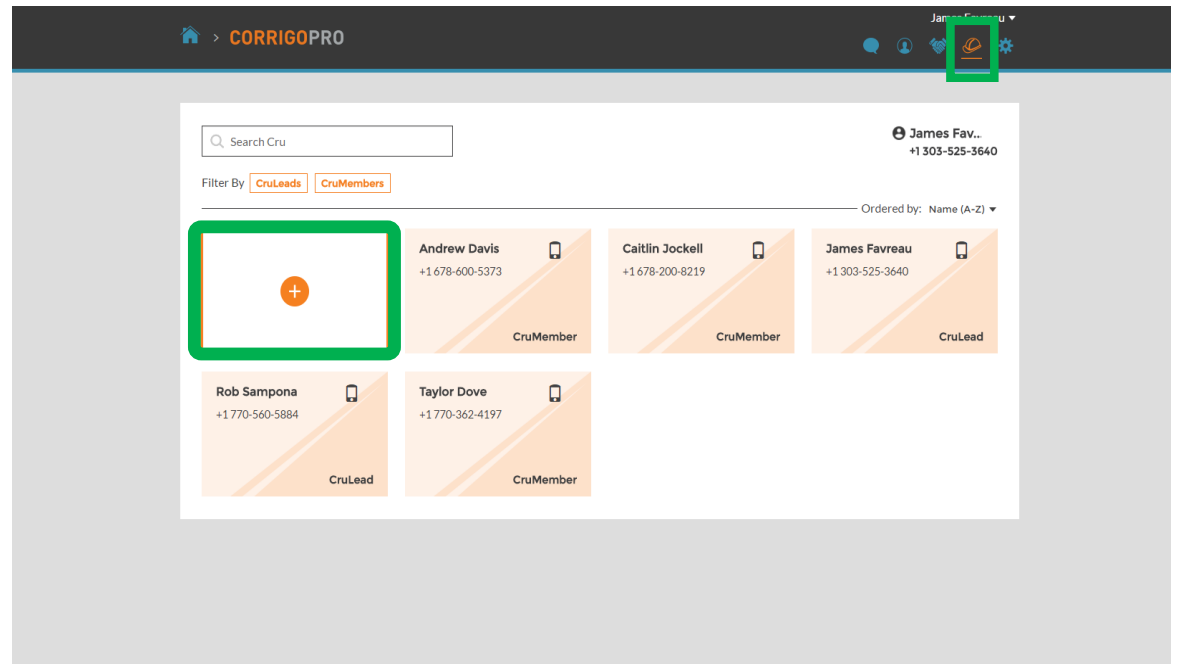
The “Invite Pro” window will appear



Enter the employee’s mobile phone number

Click “INVITE”

By default, the invitee will be invited as a “CruMember”, however, you may select to invite them as a “CruLead”

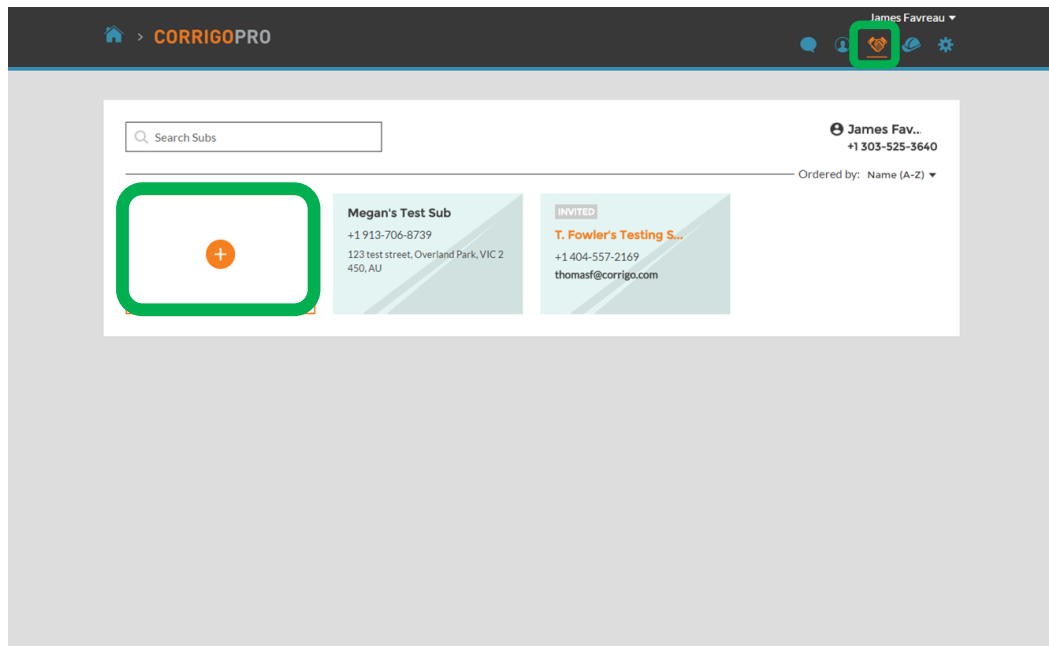


**A CruLead**, typically someone in a leadership or dispatch role, can see all CruChats

**A CruMember**, typically technicians or field personnel that only need to be included in specific conversations, must be added to a CruChat

# Our Subcontractors

By clicking on the “Our Subs” icon, represented by a handshake, you will see all of your invited and connected subcontractors or partner businesses



This will initiate a search of the CorrigoPro system to see if your Sub is already connected to Corrigo

To invite a new Sub, click on the large, white box with the orange *plus* symbol

This will bring up the “Add Subs” window

**Add Subs** ×

Enter your sub's company name and/or phone number and press SEARCH

COMPANY NAME

PHONE NUMBER

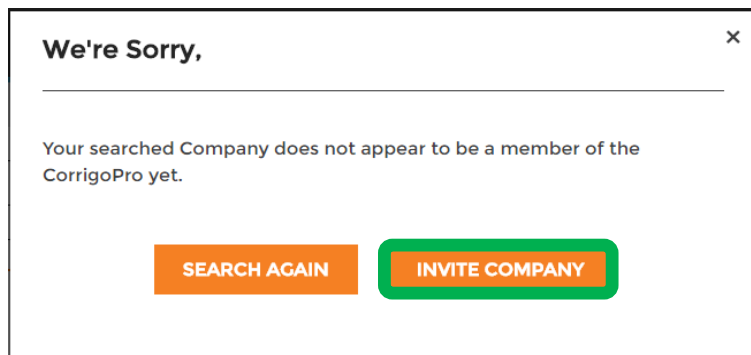
**SEARCH**

Enter the Sub's company name and mobile phone number

Then click “SEARCH”

# Our Subs: Inviting your subs

If your Sub's company is not found, then simply click "INVITE COMPANY"

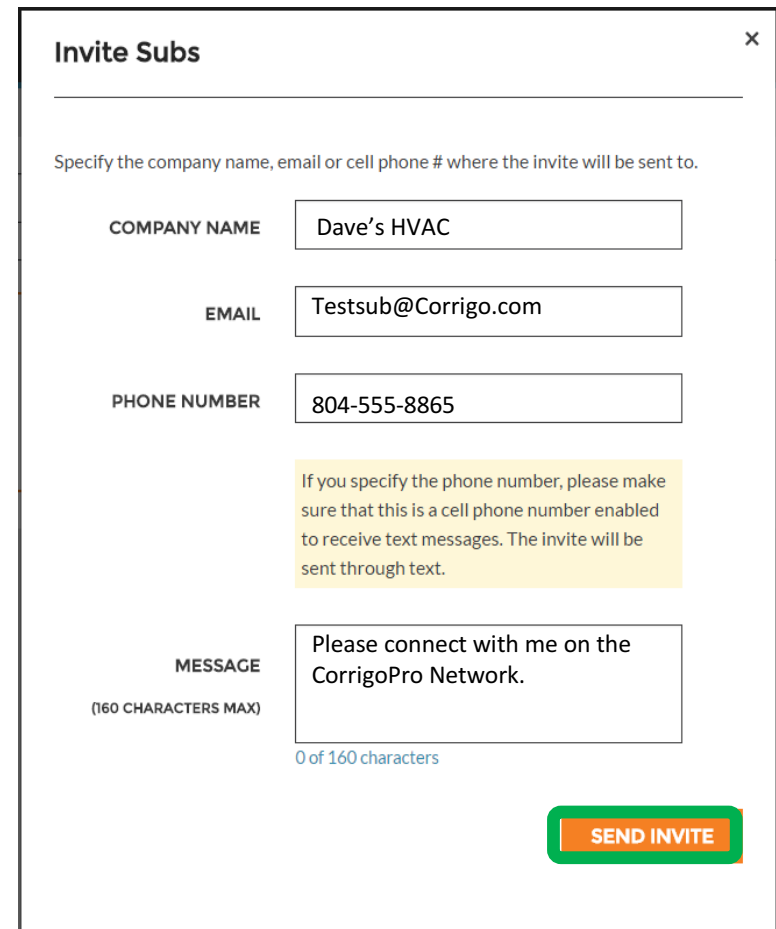


A dialog box titled "We're Sorry," with a close button (X) in the top right corner. The text inside reads: "Your searched Company does not appear to be a member of the CorrigoPro yet." At the bottom, there are two buttons: "SEARCH AGAIN" (orange) and "INVITE COMPANY" (green with orange text).

Enter the Sub's company name, email address and mobile phone number

You may send a personalized message to your Sub or send the invite with no message  
Click "SEND INVITE" to invite your Sub

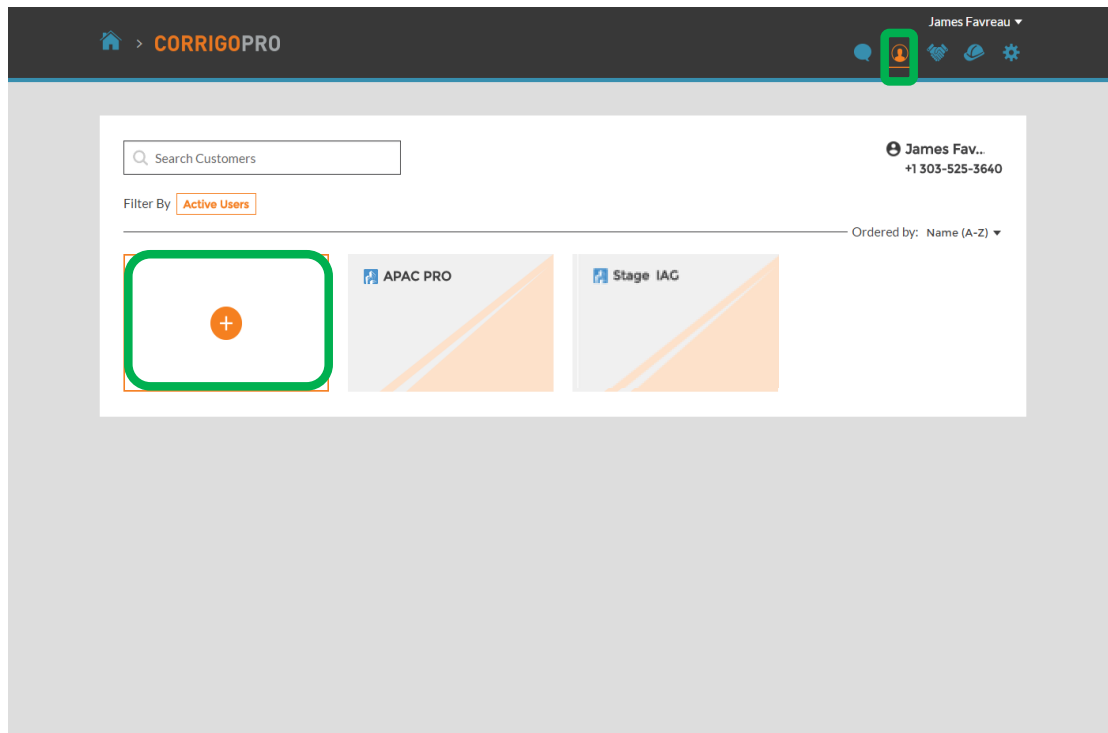
The "Invite Subs" window will appear



A window titled "Invite Subs" with a close button (X) in the top right corner. The text inside reads: "Specify the company name, email or cell phone # where the invite will be sent to." Below this are three input fields: "COMPANY NAME" (Dave's HVAC), "EMAIL" (Testsub@Corrigo.com), and "PHONE NUMBER" (804-555-8865). A yellow highlighted box contains the text: "If you specify the phone number, please make sure that this is a cell phone number enabled to receive text messages. The invite will be sent through text." Below the input fields is a "MESSAGE" field (160 CHARACTERS MAX) containing the text: "Please connect with me on the CorrigoPro Network." Below the message field is the text "0 of 160 characters". At the bottom right, there is a "SEND INVITE" button (green with orange text).

# Our Customers

The next icon is a circle with a silhouette, clicking here will bring you to your “Our Customers” page where you can manage and view your invited and connected customers



To invite a non-Corrigo customer to connect, click on the large, white box with the orange *plus* symbol

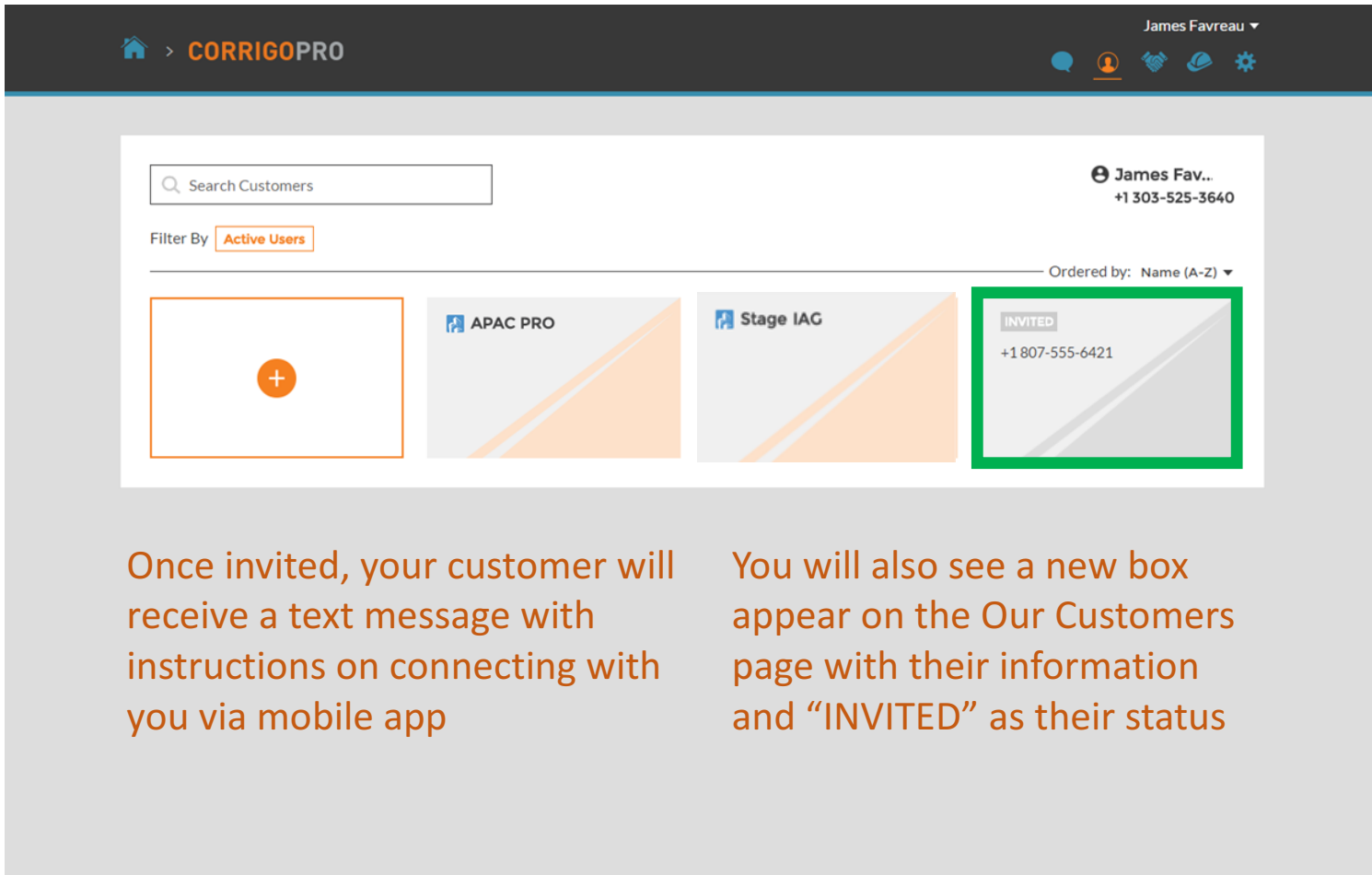
The “Invite Customer” window will appear

A screenshot of the 'Invite Customer' modal window. The window has a title bar with the text 'Invite Customer' and a close button (X). Below the title bar is a text input field with the placeholder text 'Type invitee phone #'. At the bottom of the window, there are two buttons: a 'CANCEL' button and an 'INVITE' button. The 'INVITE' button is highlighted with a green border.

Enter your customer’s mobile phone number and then click “INVITE”

# Our Customers

Since CorrigoPro is designed to be used by anyone needing a service provider, you can invite all of your customers to connect with you



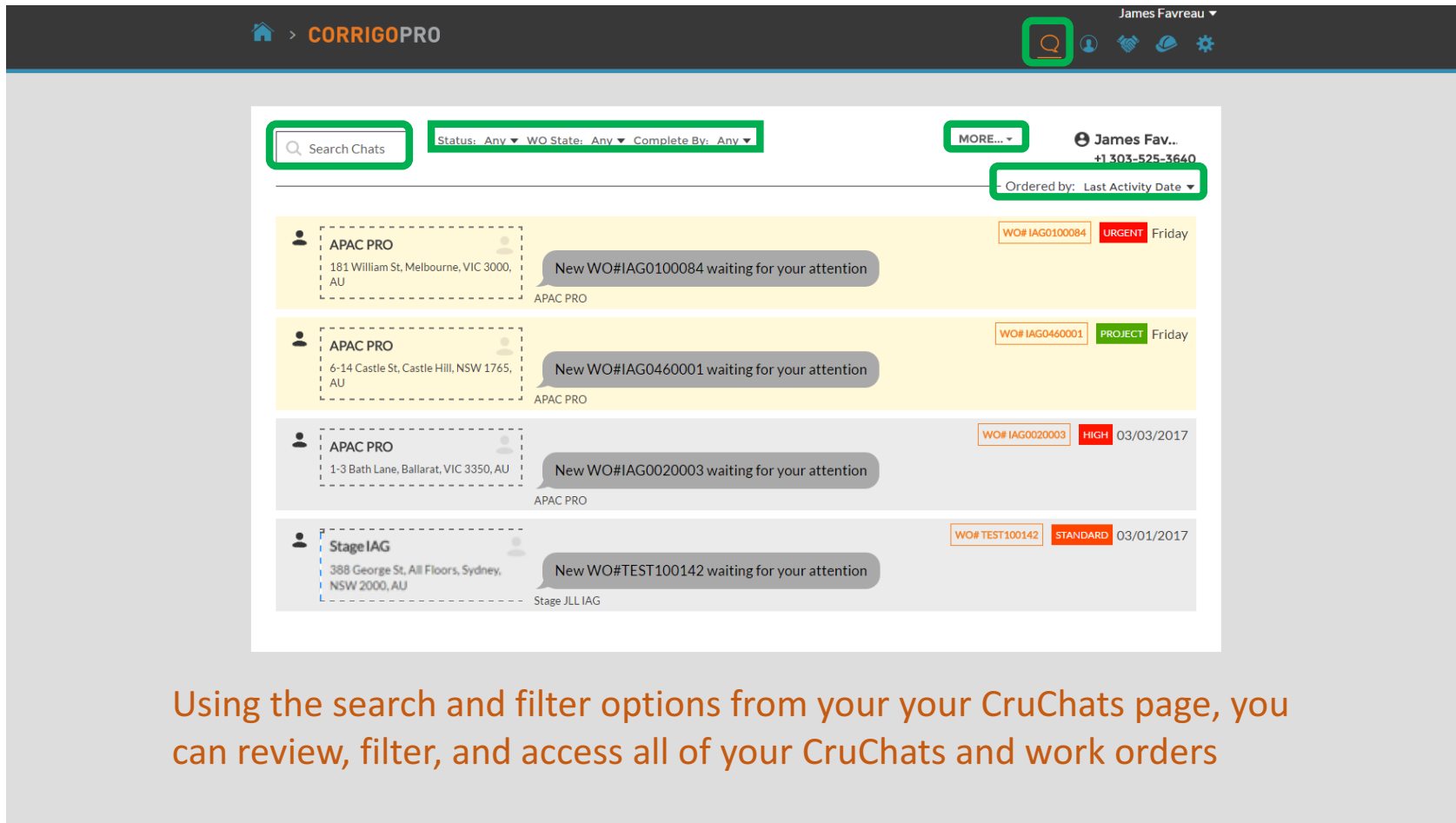
The screenshot displays the 'Our Customers' page in the CorrigoPro application. At the top, the user 'James Favreau' is logged in, with a phone number '+1 303-525-3640'. Below the search bar, the filter is set to 'Active Users'. The customer list includes 'APAC PRO', 'Stage IAG', and an 'INVITED' customer with phone number '+1 807-555-6421'. The 'INVITED' status is highlighted with a green border.

Once invited, your customer will receive a text message with instructions on connecting with you via mobile app

You will also see a new box appear on the Our Customers page with their information and “INVITED” as their status

# CruChats

The last icon, which is represented by a speech bubble, is the “CruChats” icon



The screenshot displays the CruChats interface. At the top, there is a navigation bar with a home icon, the text "CORRIGOPRO", and a user profile for "James Favreau". A search icon is highlighted with a green box. Below the navigation bar, there is a search bar labeled "Search Chats" and filter options for "Status: Any", "WO State: Any", and "Complete By: Any". A "MORE..." dropdown menu is also visible. The main content area shows a list of work orders (WOs) with chat messages. Each entry includes the company name, address, a chat message, and a status label.

Company	Address	Chat Message	WO#	Status	Date
APAC PRO	181 William St, Melbourne, VIC 3000, AU	New WO#IAG0100084 waiting for your attention	WO# IAG0100084	URGENT	Friday
APAC PRO	6-14 Castle St, Castle Hill, NSW 1765, AU	New WO#IAG0460001 waiting for your attention	WO# IAG0460001	PROJECT	Friday
APAC PRO	1-3 Bath Lane, Ballarat, VIC 3350, AU	New WO#IAG0020003 waiting for your attention	WO# IAG0020003	HIGH	03/03/2017
Stage IAG	388 George St, All Floors, Sydney, NSW 2000, AU	New WO#TEST100142 waiting for your attention	WO# TEST100142	STANDARD	03/01/2017

Using the search and filter options from your your CruChats page, you can review, filter, and access all of your CruChats and work orders



# Congratulations!

You can now navigate and manage all of the tiles in the CorrigoPro Desktop platform

The screenshot displays the CorrigoPro Desktop interface. At the top left, the logo reads "CORRIGOPRO DESKTOP". At the top right, the user name "James Favreau" is shown with a dropdown arrow, and navigation icons for Home, Users, and Settings are visible. The main content area features a large dark grey alert banner with the text "ALERT: EVERY WORK ORDER REQUIRES CHECK IN AND CHECK OUT" and a link to "Learn about adding your team to CorrigoPro". Below this, a white tile for "David's HVAC" displays the CorrigoPro logo and the message "CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE". To the right, a white panel titled "Unread Messages" lists two messages from "APAC PRO" with details on location and work order numbers. A blue tile with a headset icon is also visible. At the bottom of the interface, there is a footer with copyright information and links for Support, Privacy Policy, and Terms of Use.

**CORRIGOPRO**  
DESKTOP

James Favreau ▾

Home Users Settings

**CORRIGOPRO**

**ALERT: EVERY WORK ORDER REQUIRES CHECK IN AND CHECK OUT**

[Learn about adding your team to CorrigoPro >](#)

**CORRIGOPRO** | David's HVAC

CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE

**CORRIGOPRO** ⓘ

**Unread Messages**

- **APAC PRO** Friday  
181 William St, Melbourne, VIC 3000, AU  
New WO#IAG0100084 waiting for your attention
- **APAC PRO** Friday  
6-14 Castle St, Castle Hill, NSW 1765, AU  
New WO#IAG0460001 waiting for your attention

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Click on the blue Home icon (top of your screen) to return to the main CorrigoPro Desktop page

# Questions

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Contact Corrigo via phone or online:

<https://corrigo.com/contactus/>