How to Get Paid:
Invoicing your Customers through CorrigoPro

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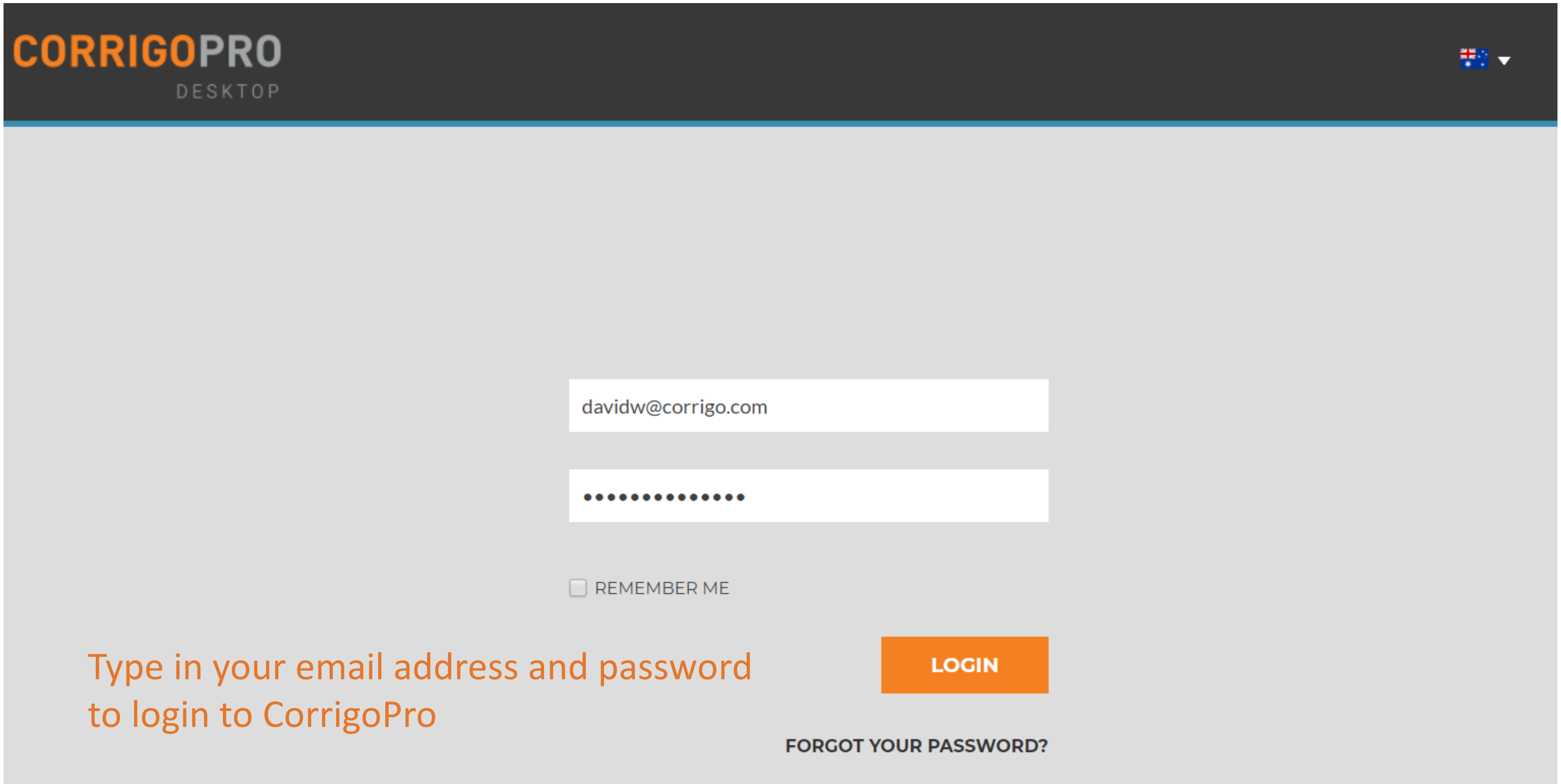
CorrigoPro Desktop Login

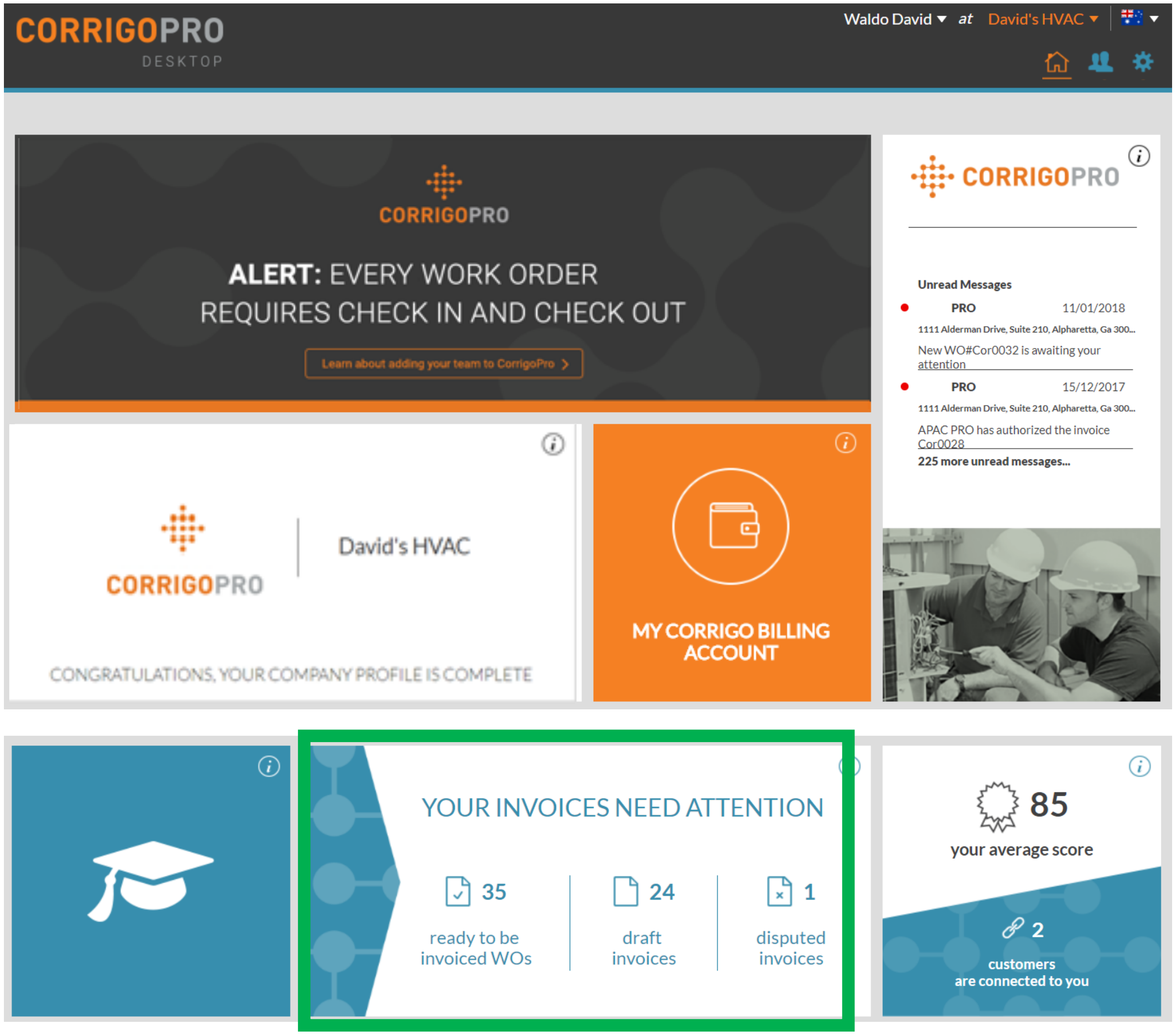


Type in your email address and password to login to CorrigoPro

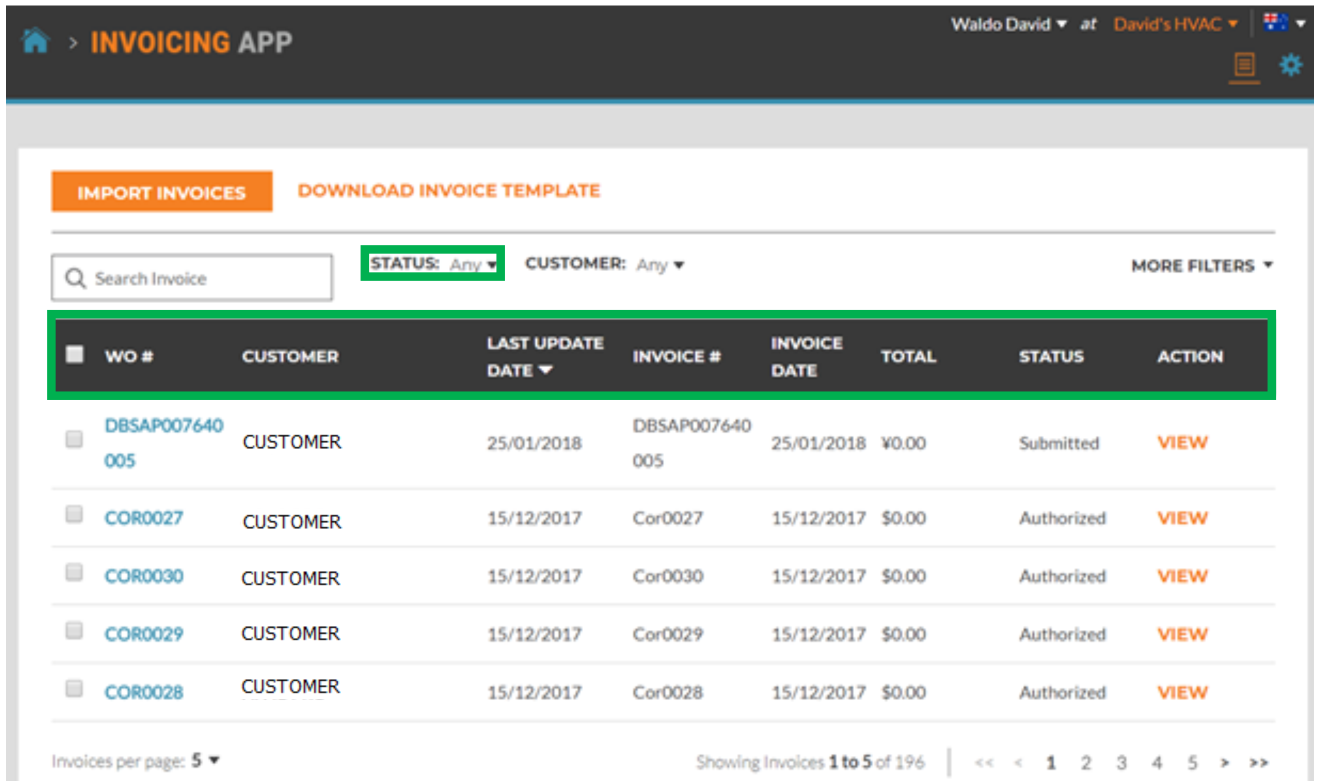
CorrigoPro Invoicing Tile

Only ADMIN USERS will be able to see and access the Invoicing Tile

Click on the Invoicing tile to open the Invoicing App within CorrigoPro Desktop



Invoicing App



Data Fields

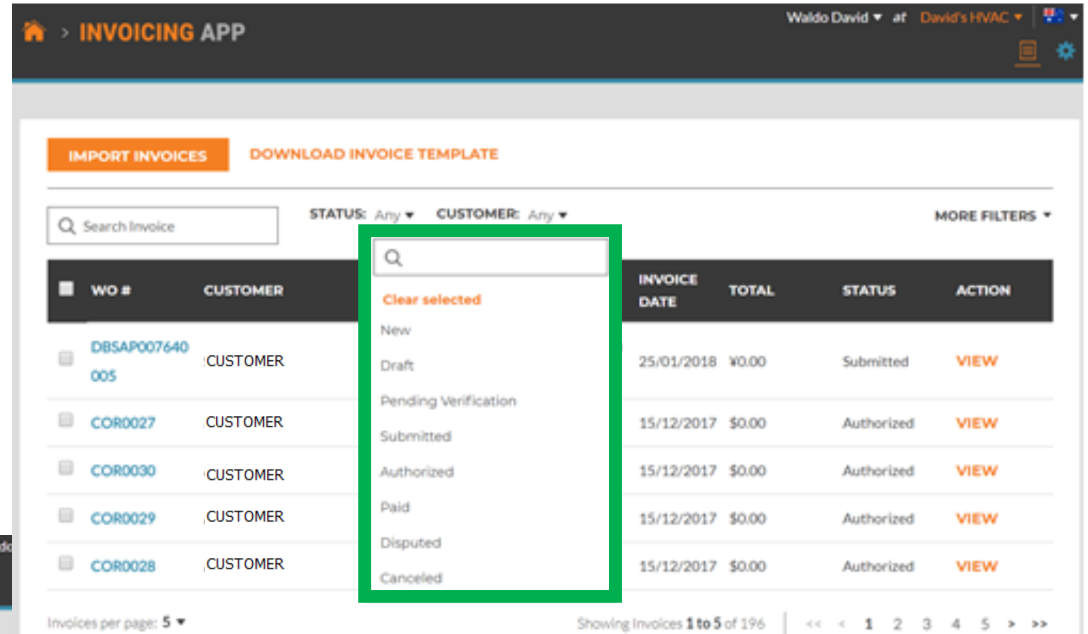
- WO#
- Customer
- Last date Updated
- Invoice #
- Invoice Date
- Total
- Status
- Action
- Search function allows you to search by WO# or Invoice#

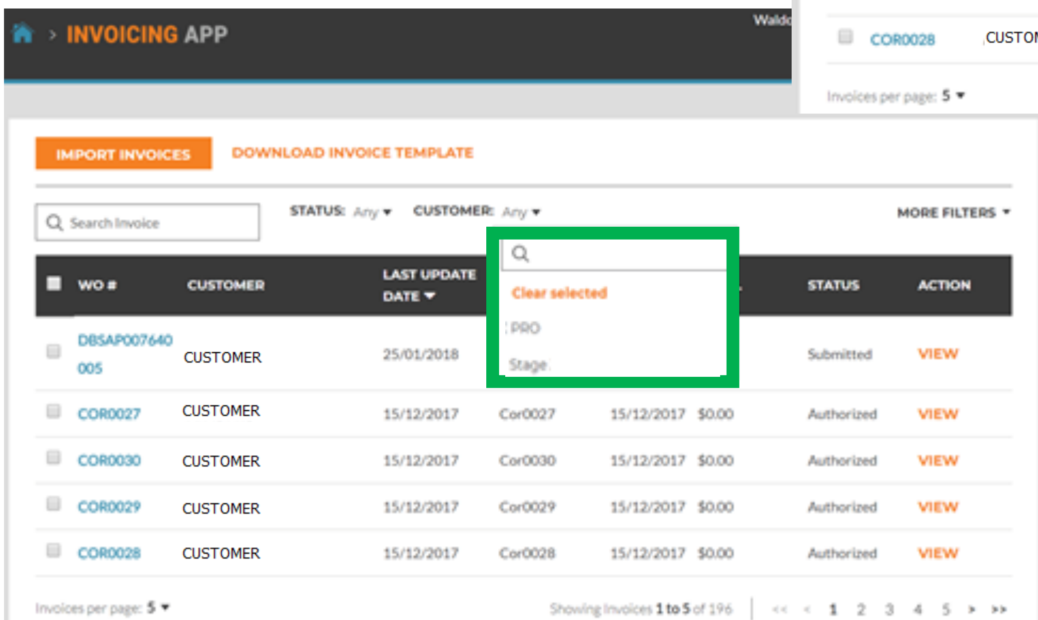
Click on “Status”

Invoicing App: Status / Customer

Status Drop Down View

- Place a check to the right of the invoice status you wish to view
- Can view more than one status at a time
- Click “Clear selected” to view all invoices

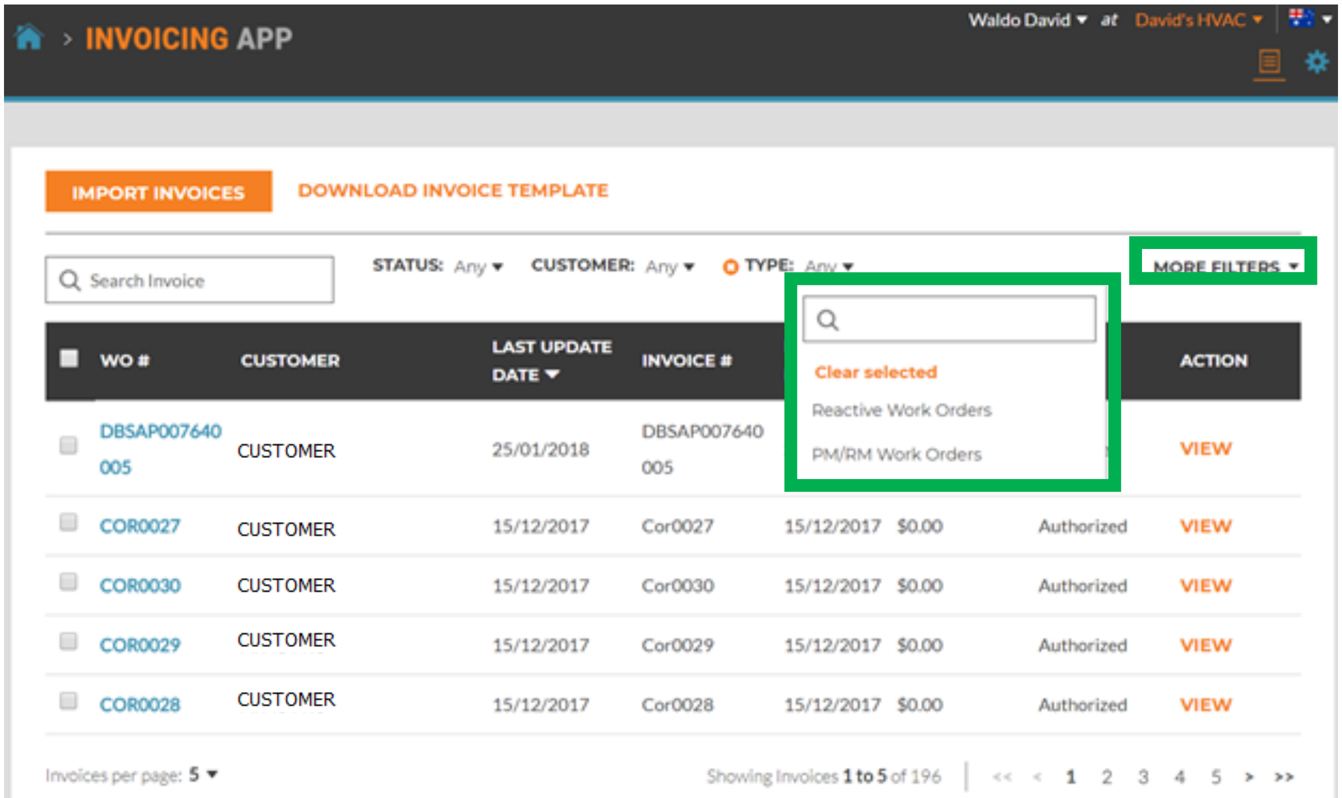




Customer Drop Down

- View all customers or place a check to the right of the specific customer you wish to view
- Click “Clear selected” to view all customers

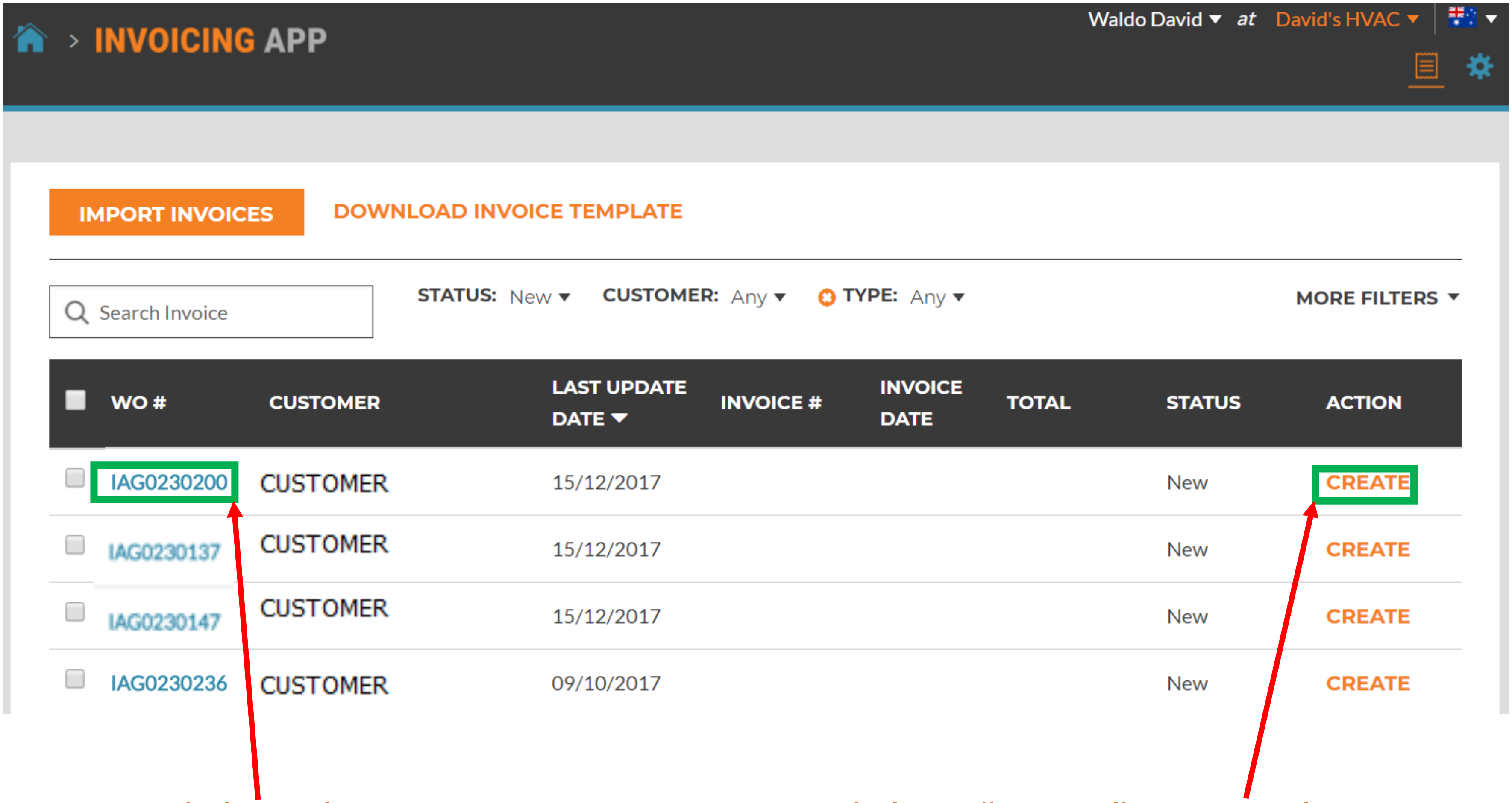
Invoicing App: More Filters



More Filters

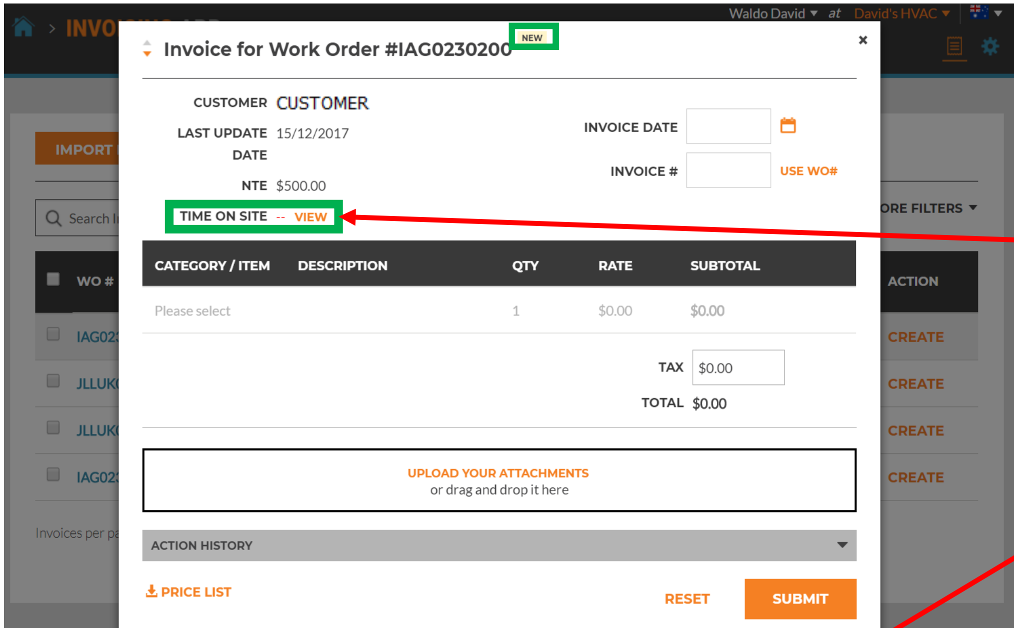
- Gives you the option of viewing invoices by Invoice Date, Last Update and invoice Type
- Click on “TYPE” to view invoices for Reactive Work Orders or PM/RM Work Orders
- Click “Clear selected” to view all invoices

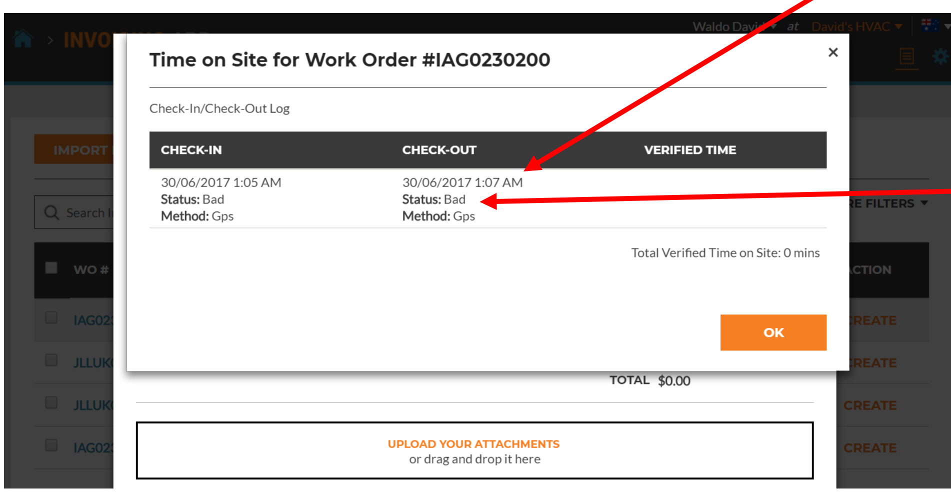
Invoicing App: Creating / Viewing a Single Invoice



- Click on the WO# to view the details of the work order
- Click on “Create” to open the desired invoice

Invoicing App: Time on Site

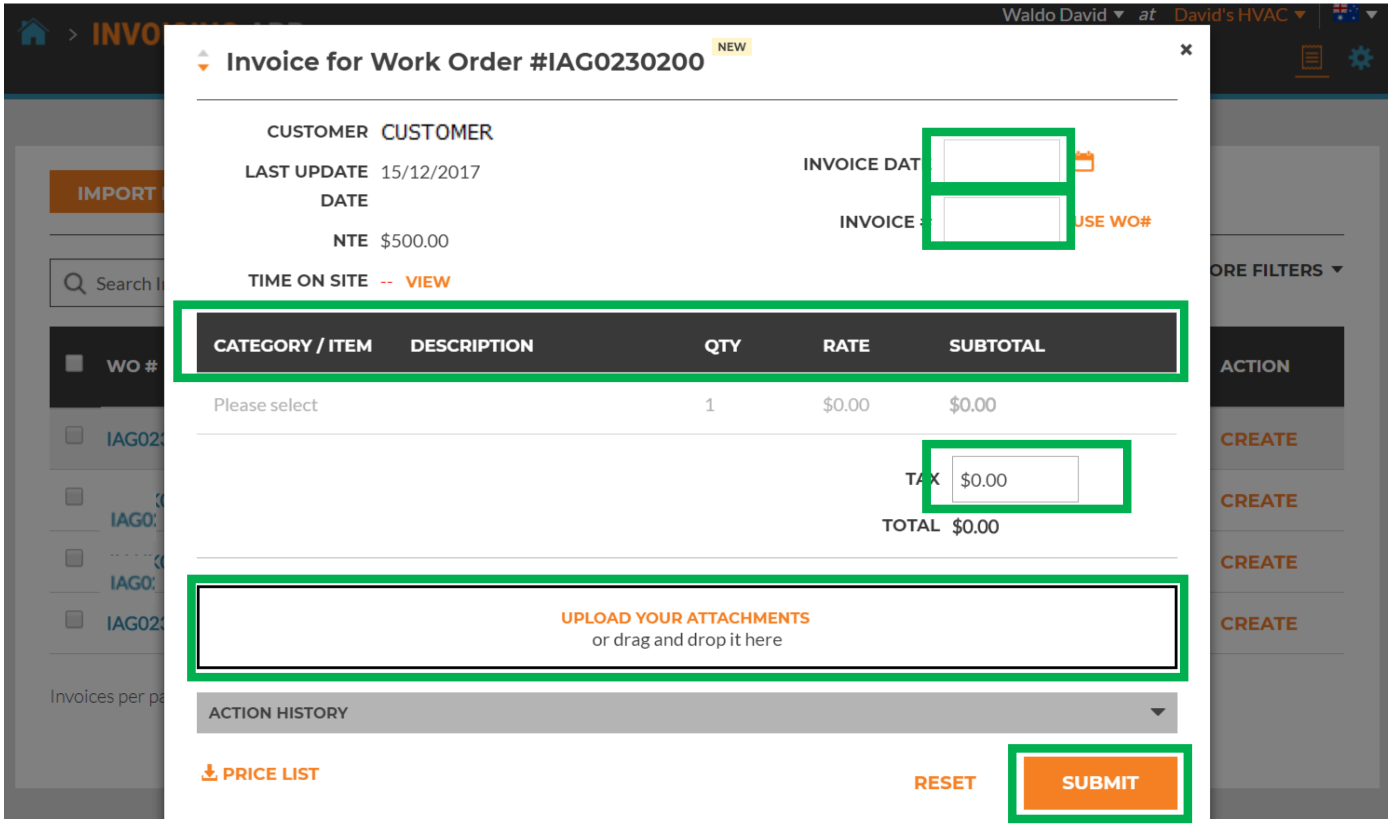




Once you click "Create", you will see your invoice template

- Click on "TIME ON SITE" to see how much time was spent providing this service
- Check in and Check out times are recorded
- GPS location is ONLY recorded for Check in / Check Out
- The status is set to "Bad" if not within set distance from location
- It is set to "Good" if within that set distance

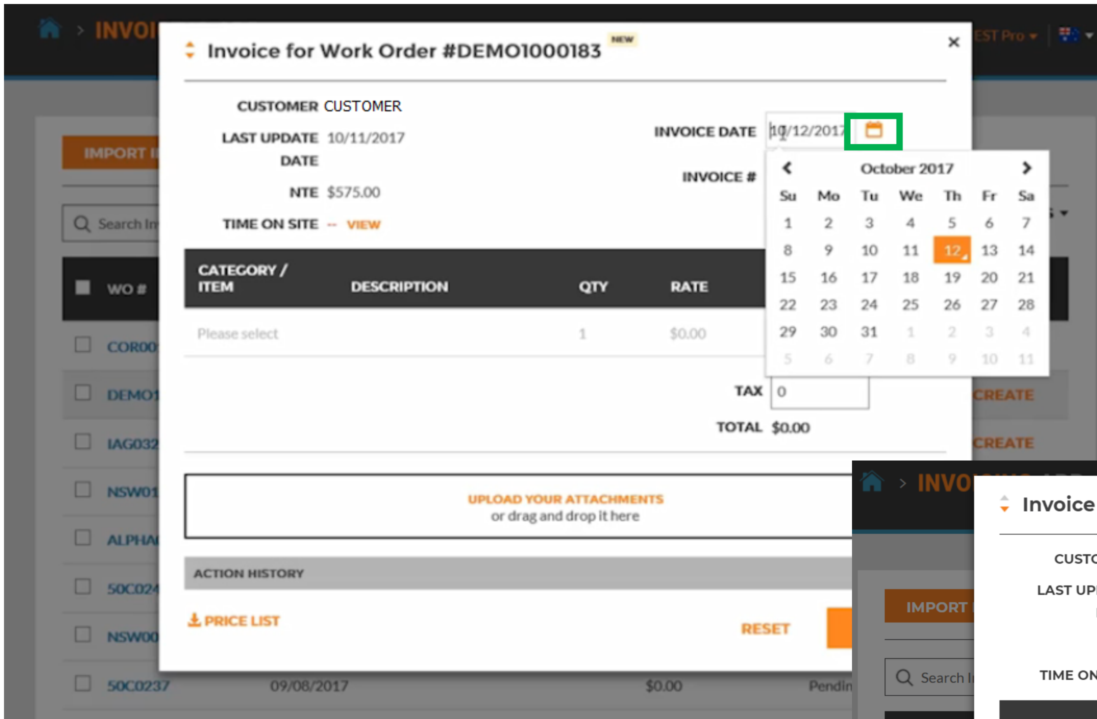
Invoicing App: Required Data fields



Required Fields

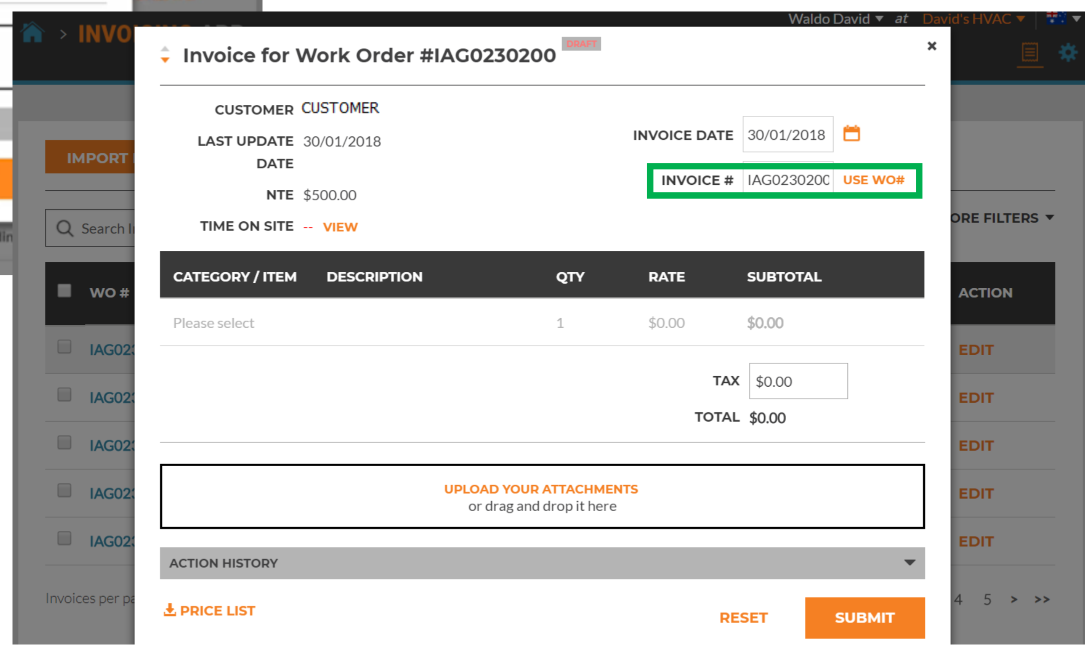
- Invoice date
- Invoice Number
- Category/Item | Description | QTY | Rate | Subtotal
- Tax (If applicable)
- Uploading Attachments is optional

Invoicing Data Field: Date / Invoice Number



Click on the "Calendar" icon

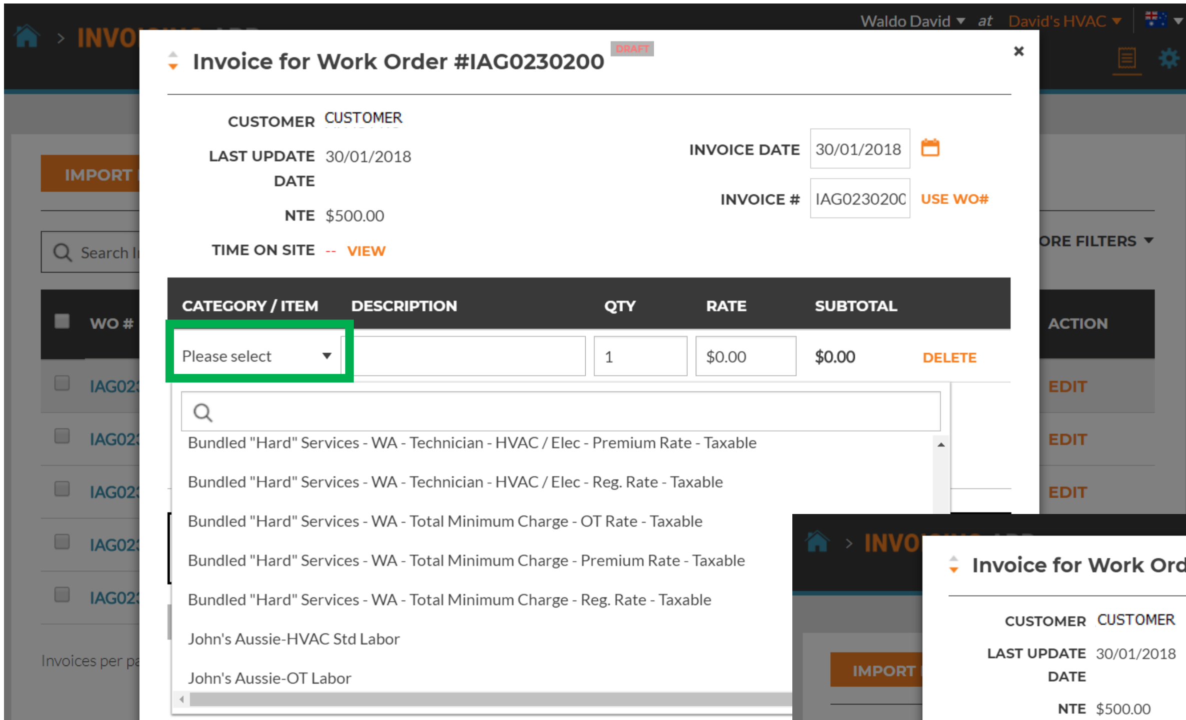
- Click on the date you wish to use for this invoice
- The date will populate in the date field
- Forward and back arrows will allow to customize the desired date used



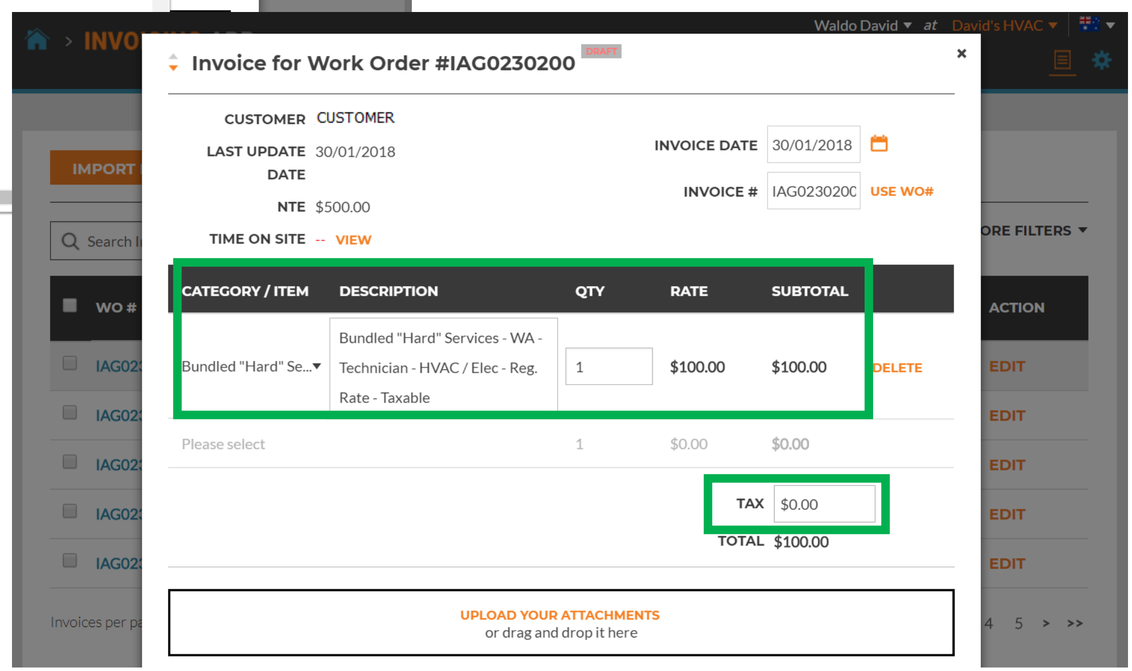
Invoice

- By clicking on the "Use WO#" you can use the WO# as the invoice #
- Customize your invoice # by typing in the desired number you wish to use – Please DO NOT copy and paste into this field

Invoicing App: Required Data Fields / Itemize Invoice

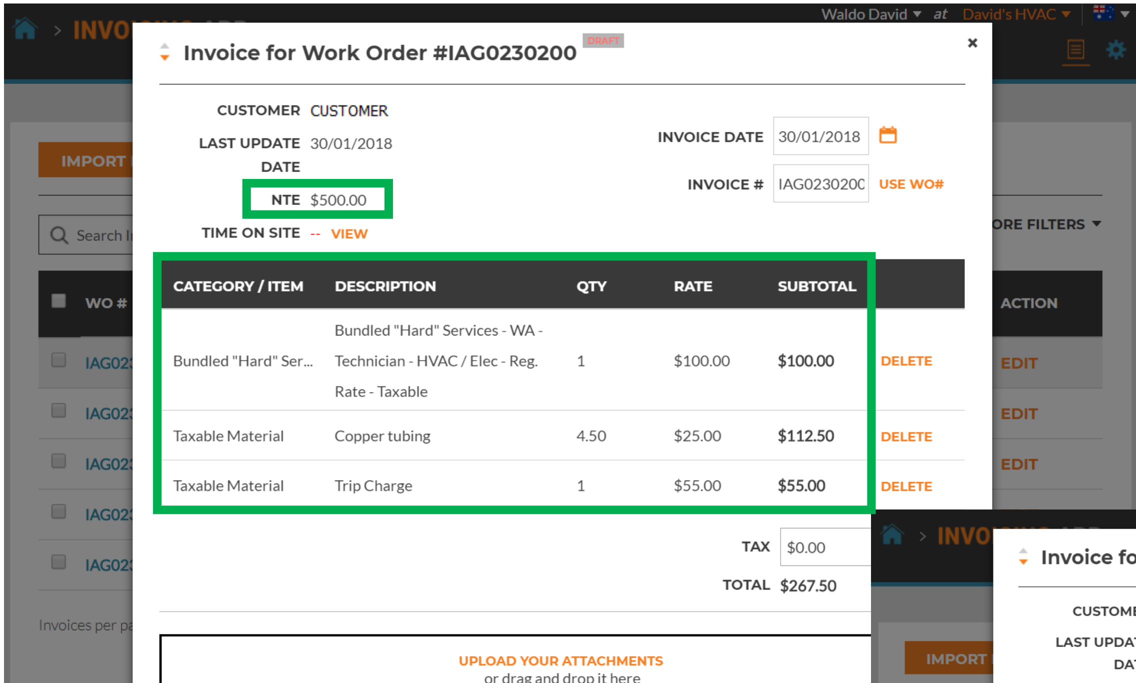


- Click under "Category / Item" to open the text box
- If a rate card is used, select services from the items provided
- If no rate card is being used, select from Labor/ Materials Parts/ Misc./Shipping/Services

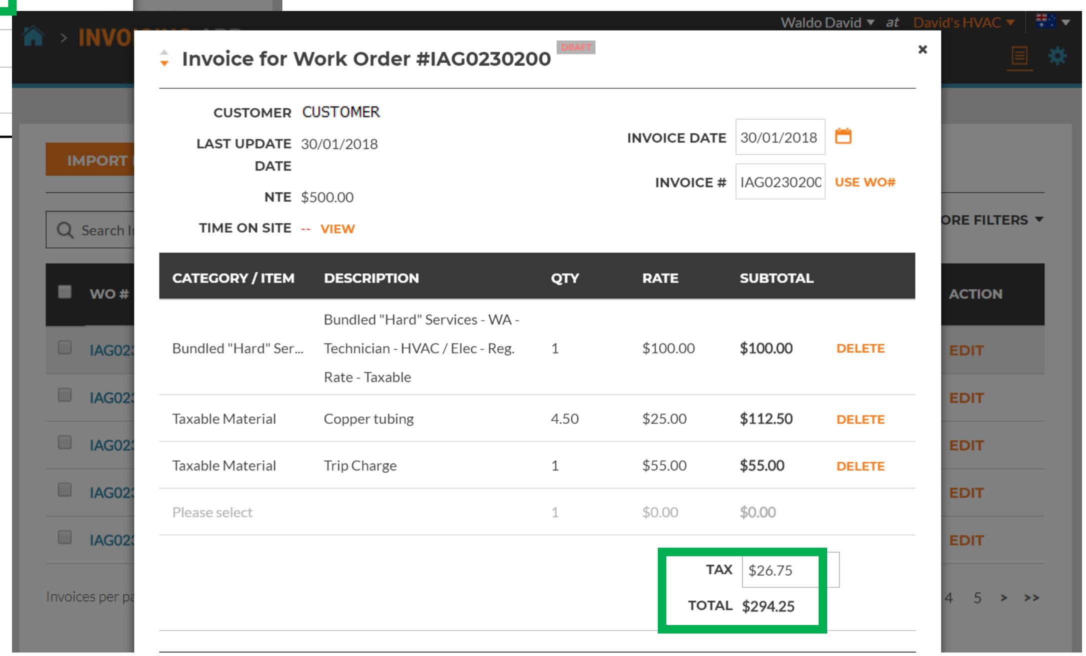


- If rate card is used Category/ Item, Description, and Rate will auto-populate – QTY should be added
- Manually populate invoice if using Labor/Material Parts/Mics/Shipping/ Services
- Tax has to be manually populated

Invoicing App: Required Data Fields / Itemize Invoice

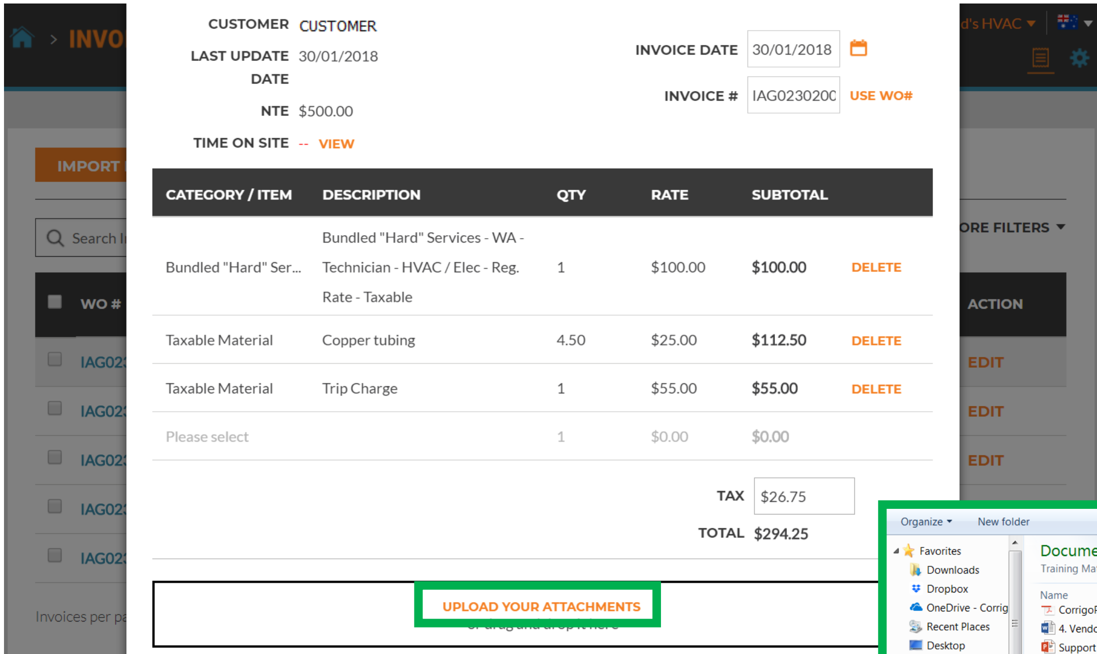


- NTE is the maximum amount that an invoice can be submitted for, in this case the NTE is $500
- NTE is tax inclusive
- Add as many items as need in the invoice
- Description field is free text up to 1140 characters



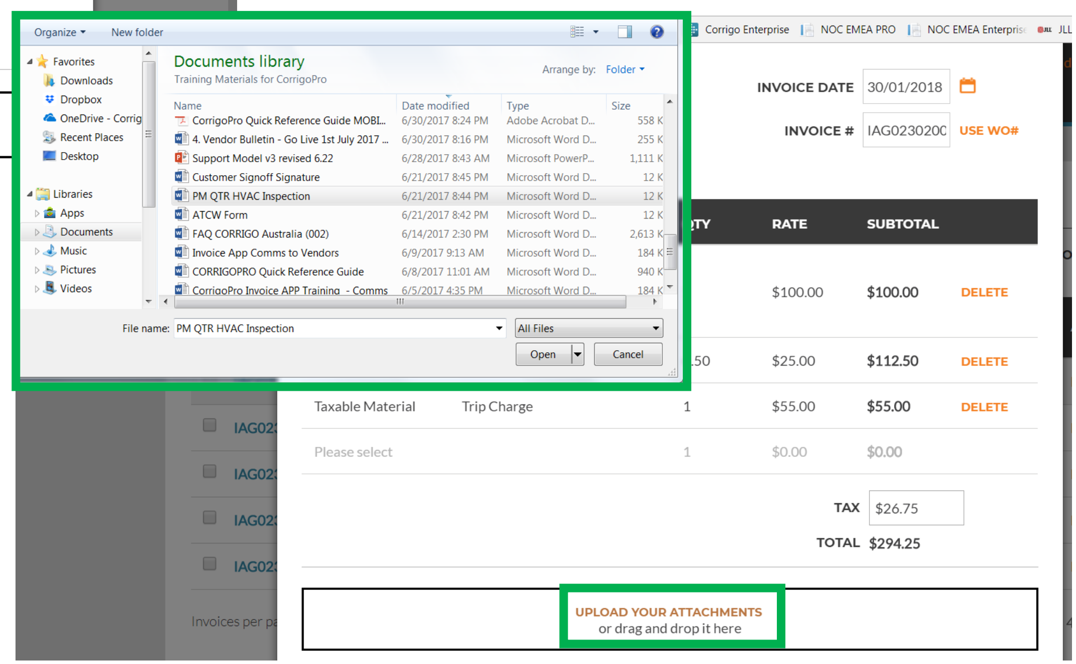
- Once you have a total, taxes can be calculated and applied
- The total will be auto populated

Invoicing App: Attaching Documents

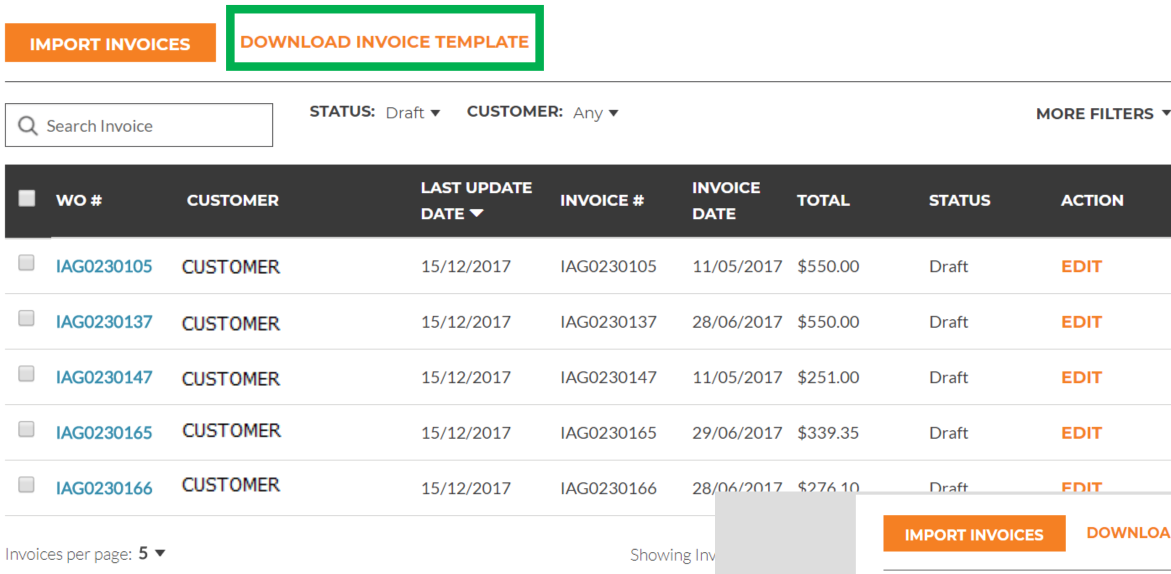


To attach a document click on “UPLOAD YOUR ATTACHMENTS”

- The system will take you to your computer’s document library
- Click on the file you wish to attach or you can drag and drop the file into your invoice
- Attach as many files as needed

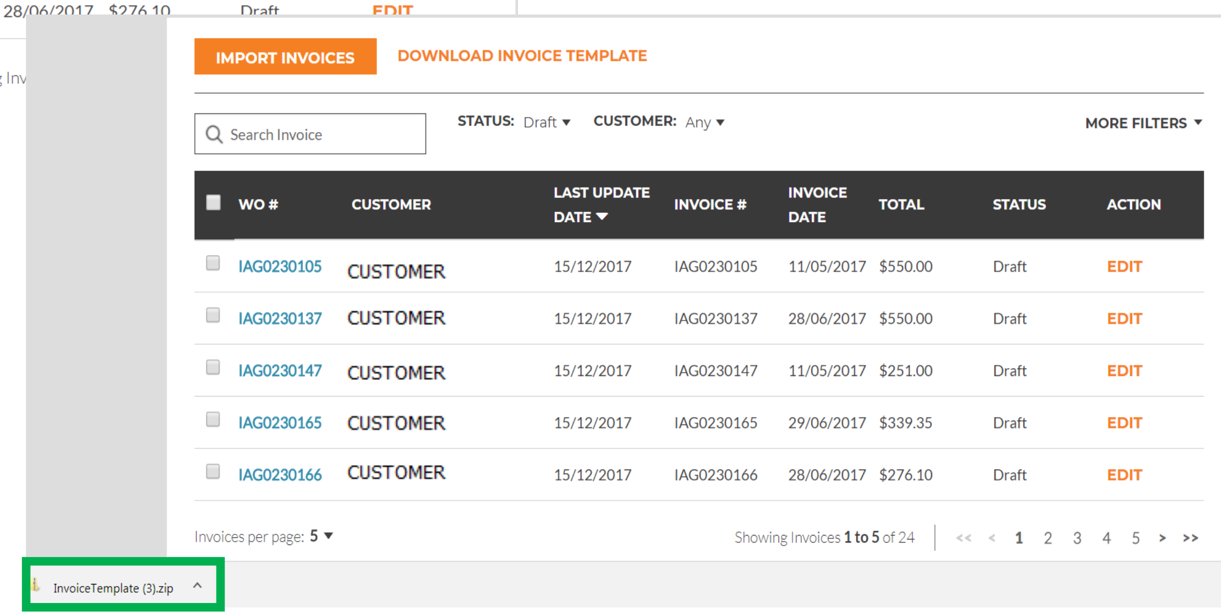


Invoicing App: Bulk Invoice Import Template



- To import multiple invoices at one time you will need to use the Invoice Template
- Click on "DOWNLOAD INVOICE TEMPLATE"

- The "Invoice Template" will appear in the lower left hand corner of your screen
- Click to open the template



Invoicing App: Bulk Invoice Import Template

Work Order Number	Invoice Number	Invoice Date	Category/Item	Description	Quantity	Rate	Subtotal
8743	231	5/1/2016	Labor	back restroom and found	2.50	75.50	188.75
8743	231	5/1/2016	Labor	Handyman Services	1.00	65.00	65.00
43982	732	5/5/2016	Labor	Water heater installation	6.00	195.00	1,170.00
43982	732	5/5/2016	Parts & Materials	40-gallon Electic Water Heater	1.00	900.00	900.00
43982	732	5/5/2016	Miscellaneous	Trip charge	1.00	100.00	100.00
43982	732	5/5/2016	Miscellaneous	Administrative Fee	1.00	40.00	40.00
43982	732	5/5/2016	Tax	Tax	1.00	83.25	83.25

- You need to fill in the required data fields above
- DO Not ADD any additional fields to the template

Things to Remember

✓ If rate card is being used, Category/Item must match rate card
✓ When itemizing, dates must match
✓ Invoice has to be within NTE
✓ Taxes must be applied

- Click on the "Help" tab to view details for filling out the template

customers.

This file InvoiceTemplate.xlsx contains two example invoices in the Invoices sheet. Before using this file for importing real invoices delete these example invoices. The two example invoices have numbers 231 and 732. Invoice #231 has two labor line items and no tax. Invoice #732 has 5 line items including tax.

There is no limit on the number of invoices that can be included per file. You can include invoices for different CorrigoPro customers in the same file.

Invoice Fields

All invoice fields are required. The first 3 fields, Work Order Number, Invoice Number and Invoice Date, are duplicated for each invoice line item.

The Excel format for each column is indicated in parentheses after the column name.

Work Order Number (Text) - the received CorrigoPro work order number.

Invoice Number (Text) - your invoice number. This can be any alphanumeric string from 1 to 32 characters in length. All invoice numbers for a given CorrigoPro client must be unique.

Invoice Date (Date) - your invoice date.

Category/Item (Text) **-** this must exactly match a valid Category/Item for this invoice. Category/Item values can differ per customer and, in unusual circumstances, different invoices for the same customer can require different Category/Items. To see the list of valid Category/Item values open the invoice page in the CorrigoPro Invoice App UI and select the Category/Item dropdown.

Description (Text) - your additional description for the Category/Item. You can enter any description up to 1024 characters in length.

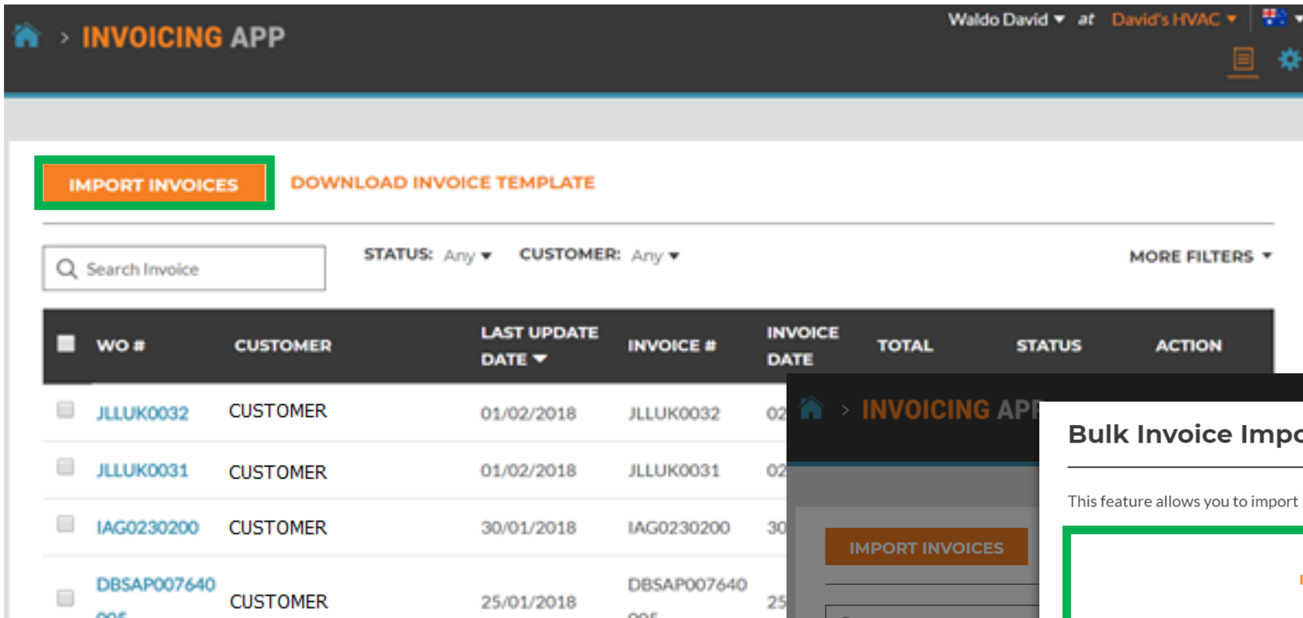
Note - for Canada if the Category/Item is "Tax" then the Description must be "HST", "PST", "GST" or "QST". For other countries the description can be left empty (this is the only time a field can be left empty apart from the case of zero invoices - see FAQ section).

Quantity (Number) - any non-zero integer or decimal number. For category "Labor" this should correspond to the hours and minutes in decimal format, e.g. 2 hrs is 2 or 2.0, 2 hrs 30 minutes is 2.5, etc.

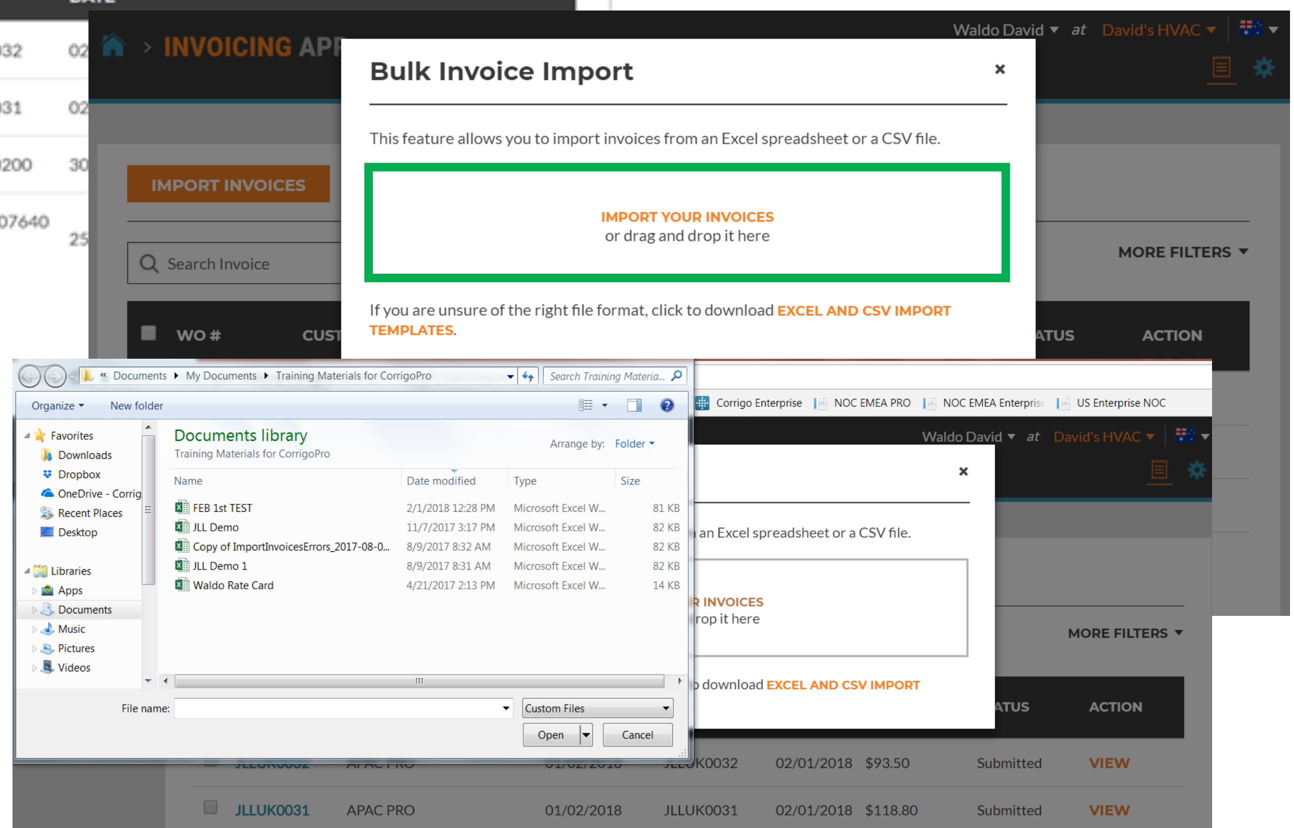
Rate (Number) - do not include the currency type. CorrigoPro will automatically decide the currency type based on the location of the

Invoices | Help

Invoicing App: Importing Invoices



- In the Invoicing App click on the "IMPORT INVOICES" button
- "IMPORT YOUR INVOCIES" box will be displayed, shown below



- Click on "IMPORT YOUR INVOICES"
- A window will open to view your Documents library
- Click on or drag and drop your saved import template
- This will start the import process

Invoicing App: Bulk Invoice Import

- Data errors are identified by the system, shown in “red”
- You can go ahead and import those that are correct
- Or you can cancel and fix those that need correcting first

Bulk Invoice Import Errors

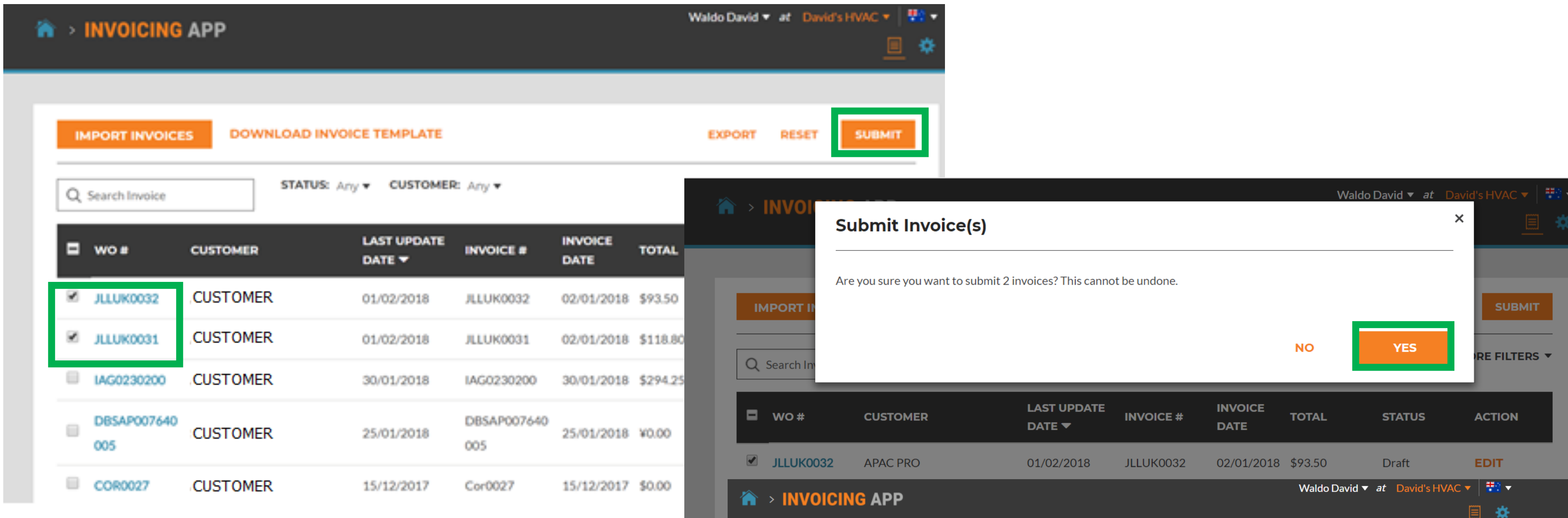
If you continue, we will only be able to import 2 out of 4 invoices from **FEB 1st TEST.xlsx**. The list of invoices that we will not be able to import is below

	WO #	INVOICE #	INVOICE DATE	ITEM	DESCRIPTION	QTY	RATE	SUBTOTAL	ERROR
3			10/05/2017	Tax	Tax	1	10.8	10.8	The WO# is not specified. Invoice# needs to be specified.
7	AIG0230236	AIG0230236	01/01/2018	Bundled "Hard" Services - ACT, NSW, QLD, VIC, TAS - Handyman - Billing unit - Premium Rate - Taxable	painted main entera...	1	100	100	Work order with a matching WO# was not found.
8	AIG0230236	AIG0230236	01/01/2018	Tax	Tax	1	10	10	Work order with a matching WO# was not found.

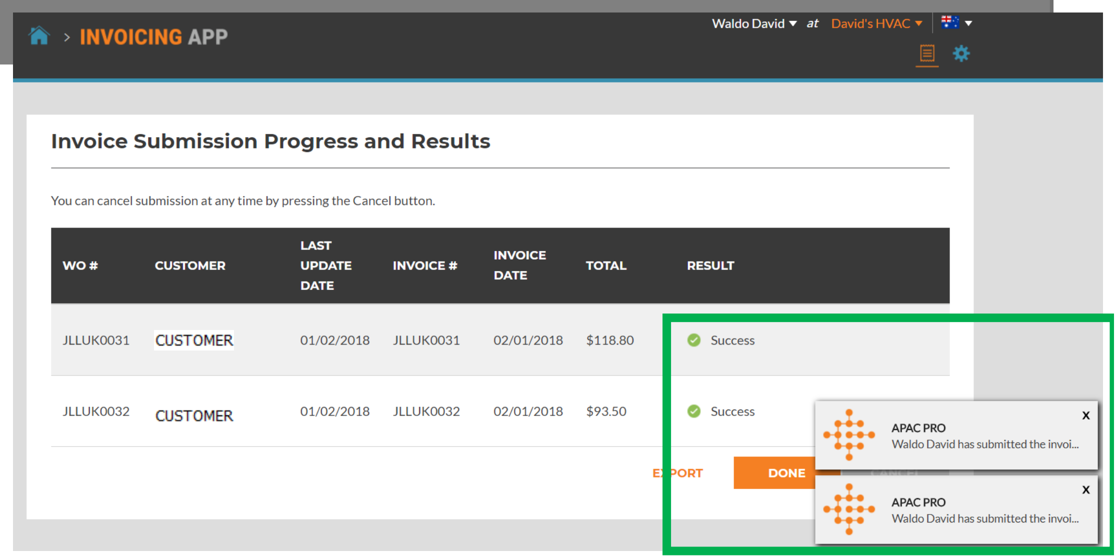
EXPORT CANCEL THE ENTIRE IMPORT **IMPORT 2 OUT OF 4 INVOICES**

	A	B	C	D	E	F	G	H	I
1	Work Order Number	Invoice Number	Invoice Date	Category/Item	Description	Quantity	Rate	Subtotal	
2	JLLUK0031	JLLUK0031	1/2/2018	Services - ACT,	NSW, QLD, VIC, TAS - Apprentice	1.20	90.00	108.00	
3			5/11/2017	Tax	Tax	1.00	10.80	10.8	The WO# is not specified. Invoice# needs to be specified.
4	JLLUK0031	JLLUK0031	1/2/2018	Tax	Tax	1.00	10.80	10.8	
5	JLLUK0032	JLLUK0032	1/2/2018	Bundled "Hard"	Bundled "Hard" Services - ACT,	1.70	50.00	85.0	
6	JLLUK0032	JLLUK0032	1/2/2018	Tax	Tax	1.00	8.50	8.5	
7	AIG0230236	AIG0230236	1/2/2018	Bundled "Hard"	painted main enterance door	1.00	100.00	100.0	Work order with a matching WO# was not found.
8	AIG0230236	AIG0230236	1/2/2018	Tax	Tax	1.00	10.00	10.0	Work order with a matching WO# was not found.
9									
10									
11									

Invoicing App: Submit Bulk Imported Invoices



- Imported invoices can now be submitted for payment, they will have a check next to them, shown above
- Click the "SUBMIT " button
- You are asked if you are sure you want to submit the invoices, click yes
- 2 invoices have been submitted successfully



Questions

Contact Corrigo via phone or online:

https://corrigopro.com/contactus/