



**CORRIGOPRO**

How to Get Paid:  
Invoicing your Customers through CorrigoPro

# Table of Contents

---

Slides 4 and 5 - CorrigoPro Invoice

Slides 6 and 7 - Invoice Statuses / Customer / Filter

Slides 8 thru 12 - Creating a Single Invoice / Required Data

Slide 13 - Attaching Documents

Slides 14 and 15 - Bulk Import Template

Slides 16 and 17 - Importing Invoices

Slide 18 - Submitting Imported Invoices

# CorrigoPro Desktop Login

---

**CORRIGOPRO**  
DESKTOP

davidw@corrigo.com

.....

REMEMBER ME

Type in your email address and password  
to login to CorrigoPro

**LOGIN**

[FORGOT YOUR PASSWORD?](#)

# 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

The screenshot displays the CorrigoPro Desktop interface. At the top, the user is identified as 'Waldo David' at 'David's HVAC'. The main dashboard 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 >'. An information icon is in the top right corner.
- Company Profile Tile:** A white tile for 'David's HVAC' with the CorrigoPro logo and the message 'CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE'. An information icon is in the top right corner.
- My Billing Account Tile:** An orange tile with a folder icon and the text 'MY CORRIGO BILLING ACCOUNT'. An information icon is in the top right corner.
- Unread Messages Panel:** A white panel on the right side showing a list of unread messages. The first message is from 'PRO' dated 11/01/2018, regarding a new work order. The second message is from 'PRO' dated 15/12/2017, regarding an authorized invoice. It indicates '225 more unread messages...'. An information icon is in the top right corner.
- Invoicing Tile (Highlighted):** A white tile with a blue background on the left showing a graduation cap icon. The main text reads 'YOUR INVOICES NEED ATTENTION'. It contains three columns of data:

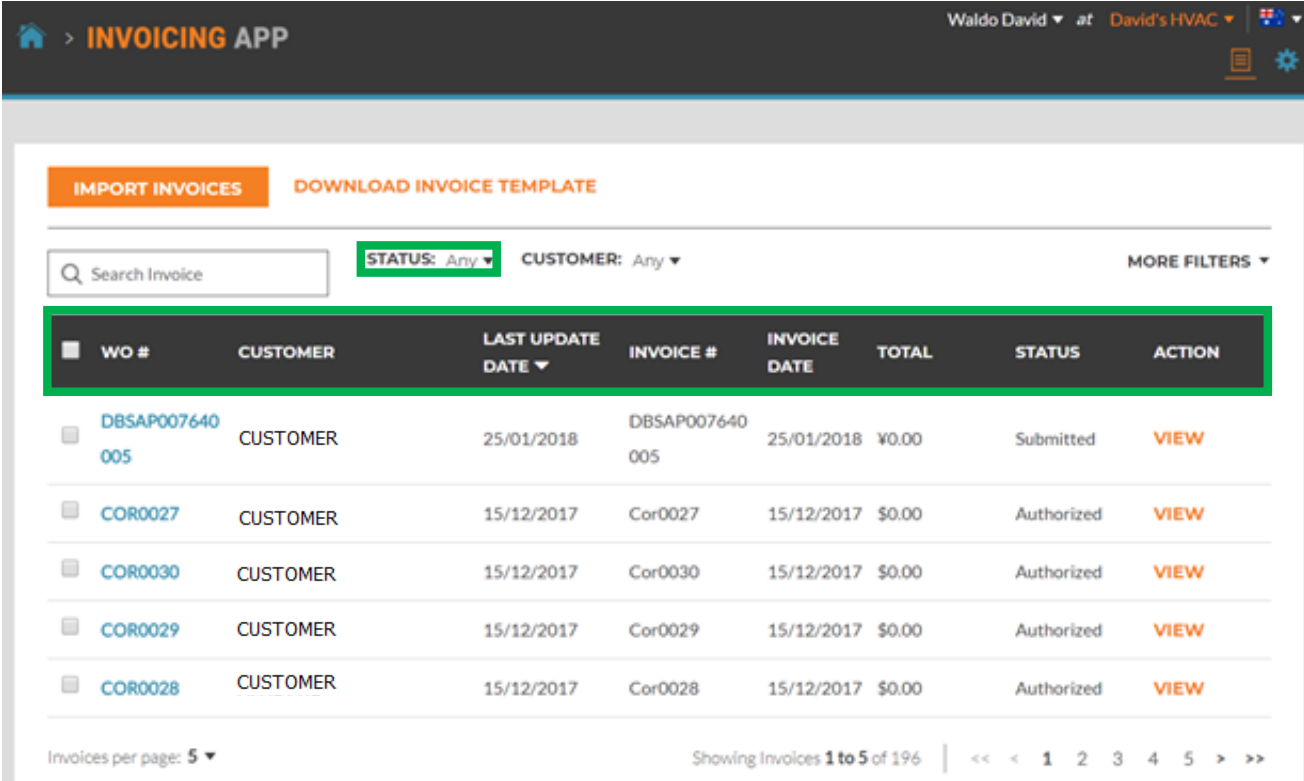
| Icon | Count | Description              |
|------|-------|--------------------------|
| ✓    | 35    | ready to be invoiced WOs |
| 📄    | 24    | draft invoices           |
| ✗    | 1     | disputed invoices        |

An information icon is in the top right corner.
- Score Tile:** A white tile with a blue background on the bottom showing a starburst icon and the text '85 your average score'. Below it, a link icon and the text '2 customers are connected to you'. An information icon is in the top right corner.

# 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#



The screenshot shows the Invoicing App interface. At the top, there is a navigation bar with a home icon, the text "INVOICING APP", and user information "Waldo David" and "David's HVAC". Below the navigation bar, there are two buttons: "IMPORT INVOICES" and "DOWNLOAD INVOICE TEMPLATE". A search bar labeled "Search Invoice" is present, along with filters for "STATUS: Any" and "CUSTOMER: Any". A "MORE FILTERS" dropdown is also visible. The main content is a table with the following columns: WO #, CUSTOMER, LAST UPDATE DATE, INVOICE #, INVOICE DATE, TOTAL, STATUS, and ACTION. The table contains five rows of data, each with a checkbox, a WO #, a customer name, a last update date, an invoice #, an invoice date, a total amount, a status, and a "VIEW" action link. The first row is highlighted with a green border.

| WO #                                    | CUSTOMER | LAST UPDATE DATE | INVOICE #      | INVOICE DATE | TOTAL  | STATUS     | ACTION               |
|---|----------|------------------|----------------|--------------|--------|------------|----------------------|
| <input type="checkbox"/> DBSAP007640005 | CUSTOMER | 25/01/2018       | DBSAP007640005 | 25/01/2018   | ¥0.00  | Submitted  | <a href="#">VIEW</a> |
| <input type="checkbox"/> COR0027        | CUSTOMER | 15/12/2017       | Cor0027        | 15/12/2017   | \$0.00 | Authorized | <a href="#">VIEW</a> |
| <input type="checkbox"/> COR0030        | CUSTOMER | 15/12/2017       | Cor0030        | 15/12/2017   | \$0.00 | Authorized | <a href="#">VIEW</a> |
| <input type="checkbox"/> COR0029        | CUSTOMER | 15/12/2017       | Cor0029        | 15/12/2017   | \$0.00 | Authorized | <a href="#">VIEW</a> |
| <input type="checkbox"/> COR0028        | CUSTOMER | 15/12/2017       | Cor0028        | 15/12/2017   | \$0.00 | Authorized | <a href="#">VIEW</a> |

Invoices per page: 5 | Showing Invoices 1 to 5 of 196 | << < 1 2 3 4 5 > >>

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

The screenshot shows the Invoicing App interface. At the top, there are buttons for 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. Below these is a search bar and filter options for 'STATUS: Any' and 'CUSTOMER: Any'. A table lists invoices with columns for 'WO #', 'CUSTOMER', 'INVOICE DATE', 'TOTAL', 'STATUS', and 'ACTION'. A dropdown menu is open over the 'STATUS' column, showing options: 'Clear selected', 'New', 'Draft', 'Pending Verification', 'Submitted', 'Authorized', 'Paid', 'Disputed', and 'Canceled'. The 'Clear selected' option is highlighted in green.

| WO #           | CUSTOMER | INVOICE DATE | TOTAL  | STATUS     | ACTION |
|----------------|----------|--------------|--------|------------|--------|
| DBSAP007640005 | CUSTOMER | 25/01/2018   | 0.00   | Submitted  | VIEW   |
| COR0027        | CUSTOMER | 15/12/2017   | \$0.00 | Authorized | VIEW   |
| COR0030        | CUSTOMER | 15/12/2017   | \$0.00 | Authorized | VIEW   |
| COR0029        | CUSTOMER | 15/12/2017   | \$0.00 | Authorized | VIEW   |
| COR0028        | CUSTOMER | 15/12/2017   | \$0.00 | Authorized | VIEW   |

The screenshot shows the Invoicing App interface. At the top, there are buttons for 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. Below these is a search bar and filter options for 'STATUS: Any' and 'CUSTOMER: Any'. A table lists invoices with columns for 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'STATUS', and 'ACTION'. A dropdown menu is open over the 'CUSTOMER' column, showing options: 'Clear selected', 'PRO', and 'Stage'. The 'Clear selected' option is highlighted in green.

| WO #           | CUSTOMER | LAST UPDATE DATE | STATUS     | ACTION |
|----------------|----------|------------------|------------|--------|
| DBSAP007640005 | CUSTOMER | 25/01/2018       | Submitted  | VIEW   |
| COR0027        | CUSTOMER | 15/12/2017       | Authorized | VIEW   |
| COR0030        | CUSTOMER | 15/12/2017       | Authorized | VIEW   |
| COR0029        | CUSTOMER | 15/12/2017       | Authorized | VIEW   |
| COR0028        | CUSTOMER | 15/12/2017       | Authorized | VIEW   |

## 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

The screenshot shows the 'INVOICING APP' interface. At the top, there are navigation links for 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. Below this is a search bar labeled 'Search Invoice' and filter options for 'STATUS: Any', 'CUSTOMER: Any', and 'TYPE: Any'. A 'MORE FILTERS' dropdown menu is open, showing a search bar and two options: 'Clear selected' and 'Reactive Work Orders'. The main table displays a list of invoices with columns for 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'INVOICE #', and 'ACTION'. The first row is highlighted in blue and has a green box around it. The table also includes a 'VIEW' button for each row. At the bottom, there is a pagination control showing 'Showing Invoices 1 to 5 of 196' and a 'Invoices per page: 5' dropdown.

| WO #               | CUSTOMER | LAST UPDATE DATE | INVOICE #          | ACTION |
|--------------------|----------|------------------|--------------------|--------|
| DBSAP007640<br>005 | CUSTOMER | 25/01/2018       | DBSAP007640<br>005 | VIEW   |
| COR0027            | CUSTOMER | 15/12/2017       | Cor0027            | VIEW   |
| COR0030            | CUSTOMER | 15/12/2017       | Cor0030            | VIEW   |
| COR0029            | CUSTOMER | 15/12/2017       | Cor0029            | VIEW   |
| COR0028            | CUSTOMER | 15/12/2017       | Cor0028            | VIEW   |

## 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

The screenshot shows the 'INVOICING APP' interface. At the top, there is a navigation bar with a home icon, the app name, and user information: 'Waldo David at David's HVAC'. Below the navigation bar, there are two buttons: 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE'. A search bar labeled 'Search Invoice' is present, along with filter options for 'STATUS: New', 'CUSTOMER: Any', and 'TYPE: Any'. A 'MORE FILTERS' dropdown is also visible. The main content is a table with the following columns: 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'INVOICE #', 'INVOICE DATE', 'TOTAL', 'STATUS', and 'ACTION'. The table contains four rows of data. The first row has 'IAG0230200' in the 'WO #' column and 'CREATE' in the 'ACTION' column. The other three rows have 'IAG0230137', 'IAG0230147', and 'IAG0230236' in the 'WO #' column and 'CREATE' in the 'ACTION' column. Red arrows point from the 'IAG0230200' cell and the 'CREATE' button in the first row to the explanatory text below.

| WO #       | CUSTOMER | LAST UPDATE DATE | INVOICE # | INVOICE DATE | TOTAL | STATUS | ACTION |
|------------|----------|------------------|-----------|--------------|-------|--------|--------|
| IAG0230200 | CUSTOMER | 15/12/2017       |           |              |       | New    | CREATE |
| IAG0230137 | CUSTOMER | 15/12/2017       |           |              |       | New    | CREATE |
| IAG0230147 | CUSTOMER | 15/12/2017       |           |              |       | New    | CREATE |
| IAG0230236 | CUSTOMER | 09/10/2017       |           |              |       | New    | CREATE |

- 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

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER  
LAST UPDATE 15/12/2017  
DATE  
NTE \$500.00

INVOICE DATE  
INVOICE # USE WO#

**TIME ON SITE -- VIEW**

| CATEGORY / ITEM | DESCRIPTION | QTY | RATE   | SUBTOTAL |
|-----------------|-------------|-----|--------|----------|
| Please select   |             | 1   | \$0.00 | \$0.00   |

TAX \$0.00  
TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS  
or drag and drop it here

ACTION HISTORY

PRICE LIST

RESET SUBMIT

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

Time on Site for Work Order #IAG0230200

Check-In/Check-Out Log

| CHECK-IN   | CHECK-OUT  | VERIFIED TIME |
|--|--|---------------|
| 30/06/2017 1:05 AM<br>Status: Bad<br>Method: Gps | 30/06/2017 1:07 AM<br>Status: Bad<br>Method: Gps |               |

Total Verified Time on Site: 0 mins

OK

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS  
or drag and drop it here

- 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

Invoice for Work Order #IAG0230200 NEW

CUSTOMER CUSTOMER

LAST UPDATE 15/12/2017

DATE

NTE \$500.00

INVOICE DATE

INVOICE #  USE WO#

TIME ON SITE -- VIEW

| CATEGORY / ITEM | DESCRIPTION | QTY | RATE   | SUBTOTAL |
|-----------------|-------------|-----|--------|----------|
| Please select   |             | 1   | \$0.00 | \$0.00   |

TAX

TOTAL \$0.00

UPLOAD YOUR ATTACHMENTS  
or drag and drop it here

ACTION HISTORY

PRICE LIST

RESET

SUBMIT

## 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

Invoice for Work Order #DEMO1000183

CUSTOMER CUSTOMER  
LAST UPDATE 10/11/2017  
DATE  
NTE \$575.00  
TIME ON SITE -- VIEW

| CATEGORY / ITEM | DESCRIPTION | QTY | RATE   |
|-----------------|-------------|-----|--------|
| Please select   |             | 1   | \$0.00 |

TAX 0  
TOTAL \$0.00

## 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 for Work Order #IAG0230200

CUSTOMER CUSTOMER  
LAST UPDATE 30/01/2018  
DATE  
NTE \$500.00  
TIME ON SITE -- VIEW

INVOICE # IAG0230200 USE WO#

| CATEGORY / ITEM | DESCRIPTION | QTY | RATE   | SUBTOTAL |
|-----------------|-------------|-----|--------|----------|
| Please select   |             | 1   | \$0.00 | \$0.00   |

TAX \$0.00  
TOTAL \$0.00

## 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

Invoice for Work Order #IAG0230200 **DRAFT**

CUSTOMER CUSTOMER

LAST UPDATE 30/01/2018 INVOICE DATE 30/01/2018

DATE INVOICE # IAG0230200 USE WO#

NTE \$500.00

TIME ON SITE -- VIEW

| CATEGORY / ITEM | DESCRIPTION | QTY | RATE   | SUBTOTAL | ACTION |
|-----------------|-------------|-----|--------|----------|--------|
| Please select   |             | 1   | \$0.00 | \$0.00   | DELETE |

Search

- Bundled "Hard" Services - WA - Technician - HVAC / Elec - Premium Rate - Taxable
- Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable
- Bundled "Hard" Services - WA - Total Minimum Charge - OT Rate - Taxable
- Bundled "Hard" Services - WA - Total Minimum Charge - Premium Rate - Taxable
- Bundled "Hard" Services - WA - Total Minimum Charge - Reg. Rate - Taxable
- John's Aussie-HVAC Std Labor
- John's Aussie-OT Labor

- 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

Invoice for Work Order #IAG0230200 **DRAFT**

CUSTOMER CUSTOMER

LAST UPDATE 30/01/2018 INVOICE DATE 30/01/2018

DATE INVOICE # IAG0230200 USE WO#

NTE \$500.00

TIME ON SITE -- VIEW

| CATEGORY / ITEM      | DESCRIPTION   | QTY | RATE     | SUBTOTAL | ACTION |
|----------------------|---|-----|----------|----------|--------|
| Bundled "Hard" Se... | Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. Rate - Taxable | 1   | \$100.00 | \$100.00 | DELETE |
| Please select        |   | 1   | \$0.00   | \$0.00   |        |

TAX \$0.00

TOTAL \$100.00

UPLOAD YOUR ATTACHMENTS or drag and drop it here

# Invoicing App: Required Data Fields / Itemize Invoice

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER  
LAST UPDATE 30/01/2018 INVOICE DATE 30/01/2018  
DATE INVOICE # IAG0230200 USE WO#  
NTE \$500.00  
TIME ON SITE -- VIEW

| CATEGORY / ITEM                | DESCRIPTION                                    | QTY  | RATE     | SUBTOTAL | ACTION |
|--------------------------------|--|------|----------|----------|--------|
| Bundled "Hard" Services - WA - | Technician - HVAC / Elec - Reg. Rate - Taxable | 1    | \$100.00 | \$100.00 | DELETE |
| Taxable Material               | Copper tubing                                  | 4.50 | \$25.00  | \$112.50 | DELETE |
| Taxable Material               | Trip Charge                                    | 1    | \$55.00  | \$55.00  | DELETE |

TAX \$0.00  
TOTAL \$267.50

UPLOAD YOUR ATTACHMENTS  
or drag and drop it here

- 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

Invoice for Work Order #IAG0230200

CUSTOMER CUSTOMER  
LAST UPDATE 30/01/2018 INVOICE DATE 30/01/2018  
DATE INVOICE # IAG0230200 USE WO#  
NTE \$500.00  
TIME ON SITE -- VIEW

| CATEGORY / ITEM                | DESCRIPTION                                    | QTY  | RATE     | SUBTOTAL | ACTION |
|--------------------------------|--|------|----------|----------|--------|
| Bundled "Hard" Services - WA - | Technician - HVAC / Elec - Reg. Rate - Taxable | 1    | \$100.00 | \$100.00 | DELETE |
| Taxable Material               | Copper tubing                                  | 4.50 | \$25.00  | \$112.50 | DELETE |
| Taxable Material               | Trip Charge                                    | 1    | \$55.00  | \$55.00  | DELETE |
| Please select                  |  | 1    | \$0.00   | \$0.00   |        |

TAX \$26.75  
TOTAL \$294.25

# Invoicing App: Attaching Documents

The screenshot displays the Invoicing App interface. At the top, it shows customer information: CUSTOMER, LAST UPDATE 30/01/2018, INVOICE DATE 30/01/2018, INVOICE # IAG023020C, NTE \$500.00, and TIME ON SITE -- VIEW. Below this is a table with columns: CATEGORY / ITEM, DESCRIPTION, QTY, RATE, SUBTOTAL, and DELETE. The table contains four rows: Bundled "Hard" Services - WA - Technician - HVAC / Elec - Reg. (1, \$100.00, \$100.00), Taxable Material - Copper tubing (4.50, \$25.00, \$112.50), Taxable Material - Trip Charge (1, \$55.00, \$55.00), and Please select (1, \$0.00, \$0.00). At the bottom right, it shows TAX \$26.75 and TOTAL \$294.25. A green box highlights the 'UPLOAD YOUR ATTACHMENTS' button. An inset window shows a Windows file explorer with a document selected.

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

The screenshot displays the Invoicing App interface. At the top, there are two buttons: 'IMPORT INVOICES' and 'DOWNLOAD INVOICE TEMPLATE', with the latter highlighted in green. Below these is a search bar and filter options for 'STATUS: Draft' and 'CUSTOMER: Any'. A table lists five draft invoices with columns for WO #, CUSTOMER, LAST UPDATE DATE, INVOICE #, INVOICE DATE, TOTAL, STATUS, and ACTION. A file download notification at the bottom shows 'InvoiceTemplate (3).zip' with a green border around it.

| WO #       | CUSTOMER | LAST UPDATE DATE | INVOICE #  | INVOICE DATE | TOTAL    | STATUS | ACTION |
|------------|----------|------------------|------------|--------------|----------|--------|--------|
| IAG0230105 | CUSTOMER | 15/12/2017       | IAG0230105 | 11/05/2017   | \$550.00 | Draft  | EDIT   |
| IAG0230137 | CUSTOMER | 15/12/2017       | IAG0230137 | 28/06/2017   | \$550.00 | Draft  | EDIT   |
| IAG0230147 | CUSTOMER | 15/12/2017       | IAG0230147 | 11/05/2017   | \$251.00 | Draft  | EDIT   |
| IAG0230165 | CUSTOMER | 15/12/2017       | IAG0230165 | 29/06/2017   | \$339.35 | Draft  | EDIT   |
| IAG0230166 | CUSTOMER | 15/12/2017       | IAG0230166 | 28/06/2017   | \$276.10 | Draft  | EDIT   |

InvoiceTemplate (3).zip

- 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

|   | A                 | B              | C            | D                 | E                               | F        | G      | H        |
|---|-------------------|----------------|--------------|-------------------|---------------------------------|----------|--------|----------|
| 1 | Work Order Number | Invoice Number | Invoice Date | Category/Item     | Description                     | Quantity | Rate   | Subtotal |
| 2 | 8743              | 231            | 5/1/2016     | Labor             | back restroom and found         | 2.50     | 75.50  | 188.75   |
| 3 | 8743              | 231            | 5/1/2016     | Labor             | Handyman Services               | 1.00     | 65.00  | 65.00    |
| 4 | 43982             | 732            | 5/5/2016     | Labor             | Water heater installation       | 6.00     | 195.00 | 1,170.00 |
| 5 | 43982             | 732            | 5/5/2016     | Parts & Materials | 40-gallon Electric Water Heater | 1.00     | 900.00 | 900.00   |
| 6 | 43982             | 732            | 5/5/2016     | Miscellaneous     | Trip charge                     | 1.00     | 100.00 | 100.00   |
| 7 | 43982             | 732            | 5/5/2016     | Miscellaneous     | Administrative Fee              | 1.00     | 40.00  | 40.00    |
| 8 | 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

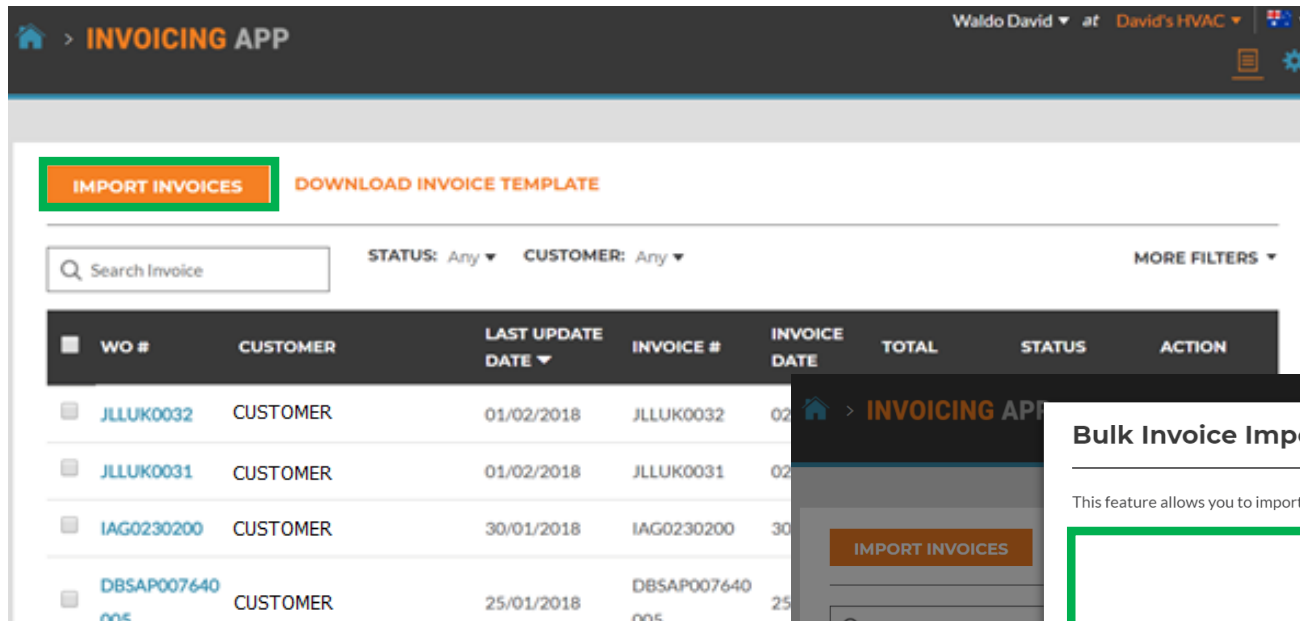
## Things to Remember

- ✓ 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

|    | A  | B | C | D | E | F | G | H |
|----|--|---|---|---|---|---|---|---|
| 4  | customers.   |   |   |   |   |   |   |   |
| 5  | 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.   |   |   |   |   |   |   |   |
| 6  | Invoice #732 has 5 line items including tax.   |   |   |   |   |   |   |   |
| 7  |  |   |   |   |   |   |   |   |
| 8  |  |   |   |   |   |   |   |   |
| 9  | 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.   |   |   |   |   |   |   |   |
| 10 |  |   |   |   |   |   |   |   |
| 11 | <b>Invoice Fields</b>  |   |   |   |   |   |   |   |
| 12 |  |   |   |   |   |   |   |   |
| 13 | All invoice fields are required. The first 3 fields, Work Order Number, Invoice Number and Invoice Date, are duplicated for each invoice line item.  |   |   |   |   |   |   |   |
| 14 |  |   |   |   |   |   |   |   |
| 15 | The Excel format for each column is indicated in parentheses after the column name.  |   |   |   |   |   |   |   |
| 16 |  |   |   |   |   |   |   |   |
| 17 | <b>Work Order Number</b> (Text) - the received CorrigoPro work order number.   |   |   |   |   |   |   |   |
| 18 |  |   |   |   |   |   |   |   |
| 19 | <b>Invoice Number</b> (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.   |   |   |   |   |   |   |   |
| 20 |  |   |   |   |   |   |   |   |
| 21 | <b>Invoice Date</b> (Date) - your invoice date.  |   |   |   |   |   |   |   |
| 22 |  |   |   |   |   |   |   |   |
| 23 | <b>Category/Item</b> (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. |   |   |   |   |   |   |   |
| 24 |  |   |   |   |   |   |   |   |
| 25 | <b>Description</b> (Text) - your additional description for the Category/Item. You can enter any description up to 1024 characters in length.  |   |   |   |   |   |   |   |
| 26 |  |   |   |   |   |   |   |   |
| 27 | 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).   |   |   |   |   |   |   |   |
| 28 |  |   |   |   |   |   |   |   |
| 29 | <b>Quantity</b> (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.   |   |   |   |   |   |   |   |
| 30 |  |   |   |   |   |   |   |   |
| 31 | <b>Rate</b> (Number) - do not include the currency type. CorrigoPro will automatically decide the currency type based on the location of the   |   |   |   |   |   |   |   |
| 32 |  |   |   |   |   |   |   |   |
| 33 |  |   |   |   |   |   |   |   |
| 34 |  |   |   |   |   |   |   |   |
| 35 |  |   |   |   |   |   |   |   |

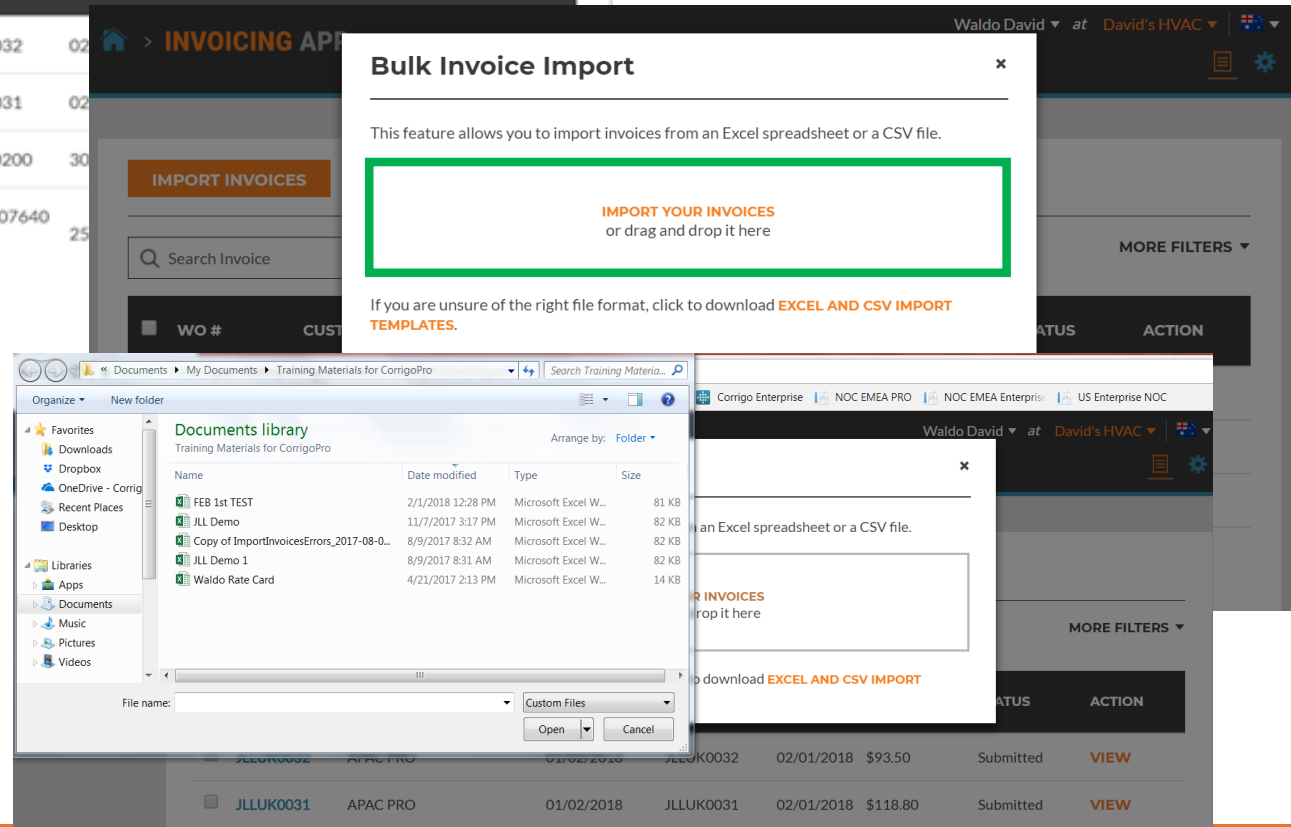


# Invoicing App: Importing Invoices



- 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: Submit Bulk Imported Invoices

The screenshot shows the 'INVOICING APP' interface. At the top, there are buttons for 'IMPORT INVOICES', 'DOWNLOAD INVOICE TEMPLATE', 'EXPORT', 'RESET', and 'SUBMIT'. Below these is a search bar and filters for 'STATUS: Any' and 'CUSTOMER: Any'. A table lists several invoices. Two invoices, JLLUK0032 and JLLUK0031, are selected, indicated by checkmarks in the first column. The 'SUBMIT' button is highlighted with a green box.

| WO #                                | CUSTOMER       | LAST UPDATE DATE | INVOICE #  | INVOICE DATE   | TOTAL      |          |
|-------------------------------------|----------------|------------------|------------|----------------|------------|----------|
| <input checked="" type="checkbox"/> | JLLUK0032      | CUSTOMER         | 01/02/2018 | JLLUK0032      | 02/01/2018 | \$93.50  |
| <input checked="" type="checkbox"/> | JLLUK0031      | CUSTOMER         | 01/02/2018 | JLLUK0031      | 02/01/2018 | \$118.80 |
| <input type="checkbox"/>            | IAG0230200     | CUSTOMER         | 30/01/2018 | IAG0230200     | 30/01/2018 | \$294.25 |
| <input type="checkbox"/>            | DBSAP007640005 | CUSTOMER         | 25/01/2018 | DBSAP007640005 | 25/01/2018 | \$0.00   |
| <input type="checkbox"/>            | COR0027        | CUSTOMER         | 15/12/2017 | Cor0027        | 15/12/2017 | \$0.00   |

The screenshot shows a confirmation dialog box titled 'Submit Invoice(s)'. The text inside asks, 'Are you sure you want to submit 2 invoices? This cannot be undone.' There are two buttons: 'NO' and 'YES'. The 'YES' button is highlighted with a green box.

- 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

The screenshot shows the 'Invoice Submission Progress and Results' page. It includes a table with columns for 'WO #', 'CUSTOMER', 'LAST UPDATE DATE', 'INVOICE #', 'INVOICE DATE', 'TOTAL', and 'RESULT'. Two rows are shown, both with a 'Success' result. A 'DONE' button is visible at the bottom right. A notification box is open, showing 'APAC PRO' and 'Waldo David has submitted the invo...'. The notification box is highlighted with a green box.

| WO #      | CUSTOMER | LAST UPDATE DATE | INVOICE # | INVOICE DATE | TOTAL    | RESULT  |
|-----------|----------|------------------|-----------|--------------|----------|---------|
| JLLUK0031 | CUSTOMER | 01/02/2018       | JLLUK0031 | 02/01/2018   | \$118.80 | Success |
| JLLUK0032 | CUSTOMER | 01/02/2018       | JLLUK0032 | 02/01/2018   | \$93.50  | Success |

# Questions

---

Contact Corrigo via phone or online:

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