



**CORRIGOPRO**

# Managing Work Orders with CorrigoPro Desktop

Life of a work order – Desktop

# During this tutorial we will cover...

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- Logging into CorrigoPro Desktop
- Locating your work orders
- The message
- The work order contact
- The service location
- The issue
- Service Level Agreement (SLA)
- Not To Exceed (NTE) amount
- Accepting or rejecting a work order
- Checking in
- Check lists
- Pausing a work order
- Checking out
- Work verification and rating
- The CruChat link

# Log into Your CorrigoPro Desktop

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

**CORRIGOPRO**  
DESKTOP

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

test@Corrigo.com

● ● ● ● ● ● ● ● ● ●

REMEMBER ME

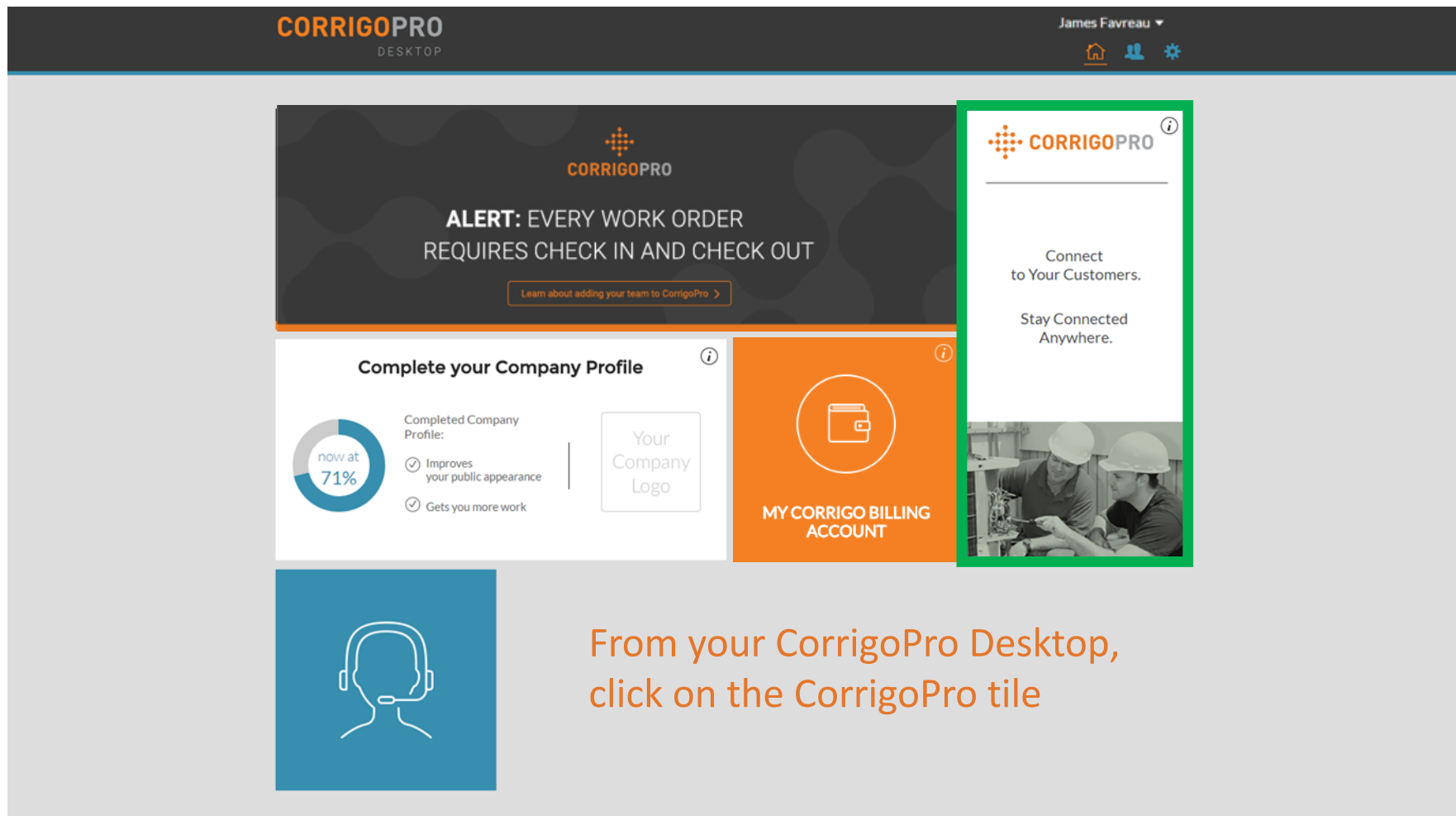
**LOGIN**

[FORGOT YOUR PASSWORD?](#)

Then click “LOGIN”

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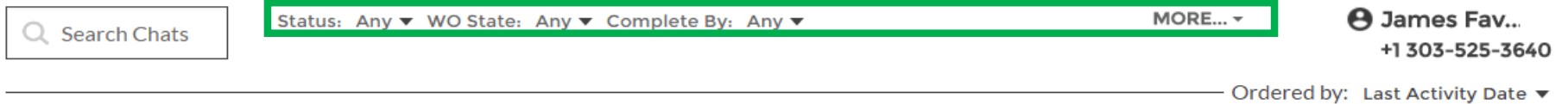
# Locating Your Work Orders



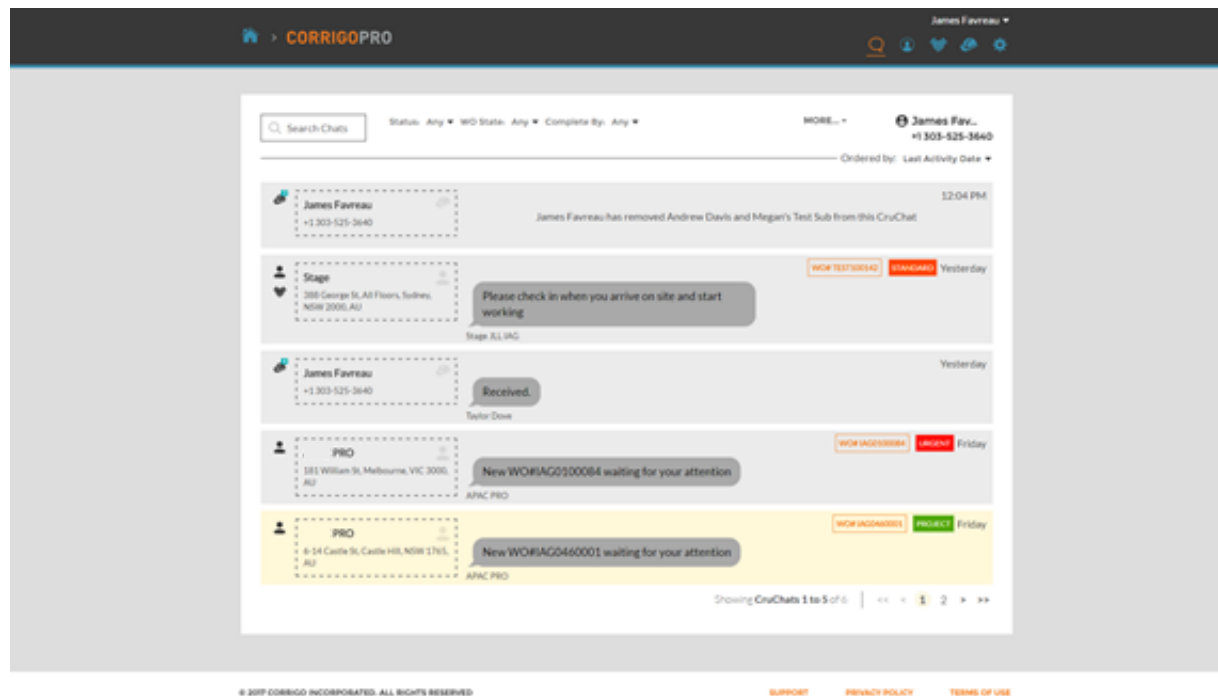
The screenshot displays the CorrigoPro Desktop interface. At the top left, the logo reads "CORRIGOPRO DESKTOP". At the top right, the user name "James Favreau" is shown with a dropdown arrow, and navigation icons for home, user profile, and settings are present. The main content area features a dark banner with the CorrigoPro logo and an alert: "ALERT: EVERY WORK ORDER REQUIRES CHECK IN AND CHECK OUT", with a link to "Learn about adding your team to CorrigoPro". Below this are three tiles: "Complete your Company Profile" (with a 71% progress indicator and two benefits), "MY CORRIGO BILLING ACCOUNT" (with a wallet icon), and a "CORRIGOPRO" tile (with a help icon and text: "Connect to Your Customers. Stay Connected Anywhere."). A green border highlights the CorrigoPro tile. In the bottom left, there is a blue square with a white headset icon. To the right of this icon, the text reads: "From your CorrigoPro Desktop, click on the CorrigoPro tile".

From your CorrigoPro Desktop,  
click on the CorrigoPro tile

# Locating Your Work Orders



Along the top of the CruChat page you'll find clickable menus, allowing you to search and filter your CruChats.

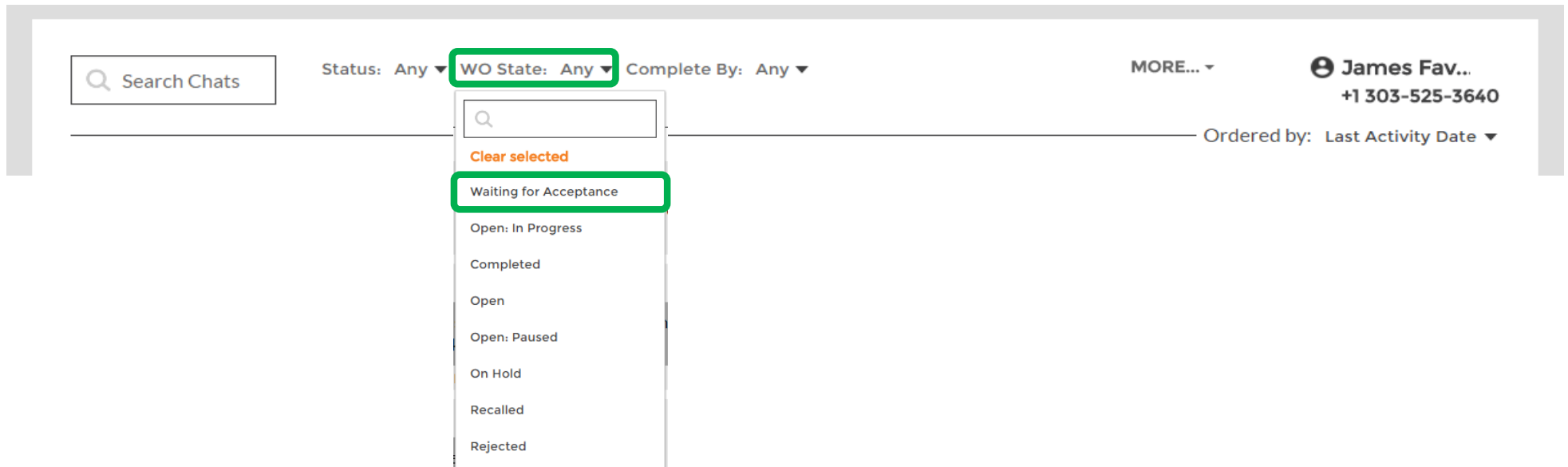


You will be taken to your CruChats page where you be able to locate all of the work orders sent by your connected customers

# Locating Your Work Orders

Powerful filter options make it easy to sort your CruChats and work orders

Let's look for work orders still waiting for acceptance



The screenshot displays a user interface for filtering work orders. At the top left, there is a search bar labeled "Search Chats". To its right are filter dropdowns: "Status: Any", "WO State: Any", and "Complete By: Any". A "MORE..." dropdown is also present. On the right side, the user's name "James Fav..." and phone number "+1 303-525-3640" are shown, along with a sorting option "Ordered by: Last Activity Date". The "WO State: Any" dropdown is open, showing a search input, a "Clear selected" button, and a list of work order states: "Waiting for Acceptance", "Open: In Progress", "Completed", "Open", "Open: Paused", "On Hold", "Recalled", and "Rejected". The "Waiting for Acceptance" option is highlighted with a green box.

To find any CruChats with work orders that have not yet been accepted, click on the “WO State” menu, click on “Waiting for Acceptance”

# Locating Your Work Orders

The screenshot shows the CORRIGOPRO user interface. At the top, there is a navigation bar with a home icon, the text 'CORRIGOPRO', and a user profile for 'James Favreau'. Below this is a search bar and several filter dropdowns: 'Status: Any', 'WO State: Waiting for Acceptance', and 'Complete By: Any'. A 'MORE...' dropdown is also present. The main content area displays a list of work orders, each with a contact card, a message, and a status indicator. The second work order is highlighted with a green border, indicating it is unread. The first and third work orders are in gray boxes, indicating they have been read.

Work Order ID	Priority	Due Date	Status
WO# IAG0100084	URGENT	Friday	Read
WO# IAG0460001	PROJECT	Friday	Unread
WO# IAG0020003	HIGH	03/03/2017	Read

CruChat boxes in yellow have not been opened or have new information that needs to be read  
Those in gray have already been opened

Let's click on the unread work order still waiting for acceptance

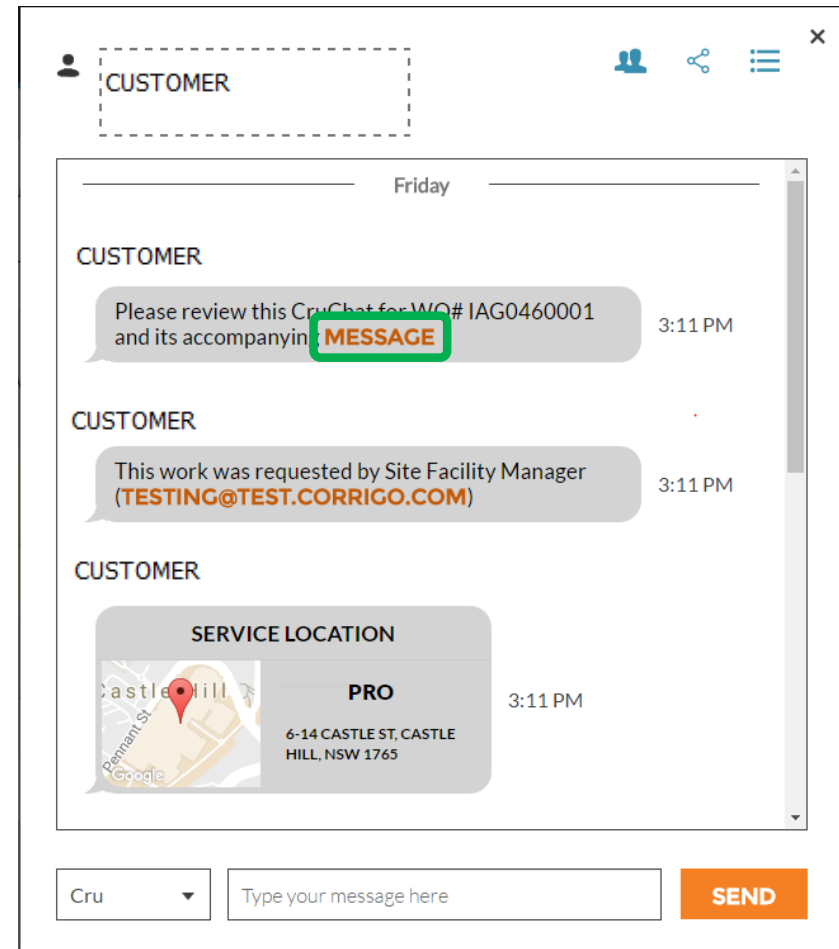
# Reviewing a New Work Order

All of the details of the work order are contained within the CruChat, with every action time and date stamped

Orange text in the work order is clickable

To begin, scroll to the top of the work order

Click on the “MESSAGE” link to display information related to the work order, input by the customer



The screenshot displays a chat window titled "CUSTOMER" with a dashed border. At the top right, there are icons for a group of people, a share icon, and a menu icon. The chat history shows three messages from the customer, all timestamped "3:11 PM". The first message says "Please review this CruChat for WO# IAG0460001 and its accompanying MESSAGE", with the word "MESSAGE" highlighted in a green box. The second message says "This work was requested by Site Facility Manager (TESTING@TEST.CORRIGO.COM)". The third message is a "SERVICE LOCATION" card featuring a map of Castle Hill, NSW, with a red location pin and the text "PRO 6-14 CASTLE ST, CASTLE HILL, NSW 1765". At the bottom of the chat window, there is a dropdown menu set to "Cru", a text input field with the placeholder "Type your message here", and an orange "SEND" button.



# Accompanying Message

Contact information, work description, and procedural details may be included in the message

To exit the message box and return to the work order, click "CLOSE"

## WO #IAG0460001 Accompanying Message ×

Property: Castle Hill - 6-14 Castle St  
Location: Shop 277 Level 2, Castle Towers Shopping Centre - Level 03  
Customer Contact: Site Facility Manager  
Priority: Project - Please schedule technician arrival within the listed ETA.  
Work Completion Due By: 6/30/2017 5:00 PM  
Expanded Work Description: Landscaping:Trees & Shrubs:maintenance and replacement  
Contact No: testing@test.corrigo.com

STANDARD PROCEDURES AND TERMS:

Prior to attending site, please ensure that you have contacted the Facilities Manager or the Onsite Contact listed below and arrange an appropriate time to attend within the Required Completion Time.

Check-in/check-out via your Corrigo Pro app is required when on-site.

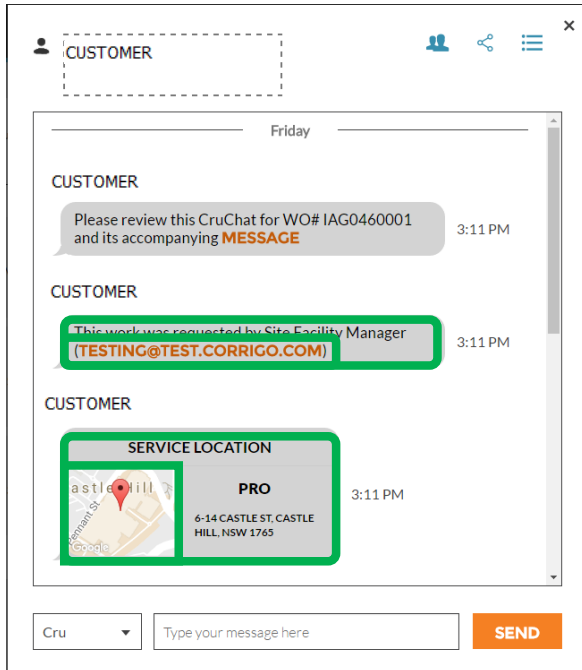
The Corrigo Pro app can be downloaded from the Apple or Google App store.

For assistance or additional information related to this work order, please contact the Property Service Centre

For help with your Corrigo Pro account, please contact Corrigo Pro Support

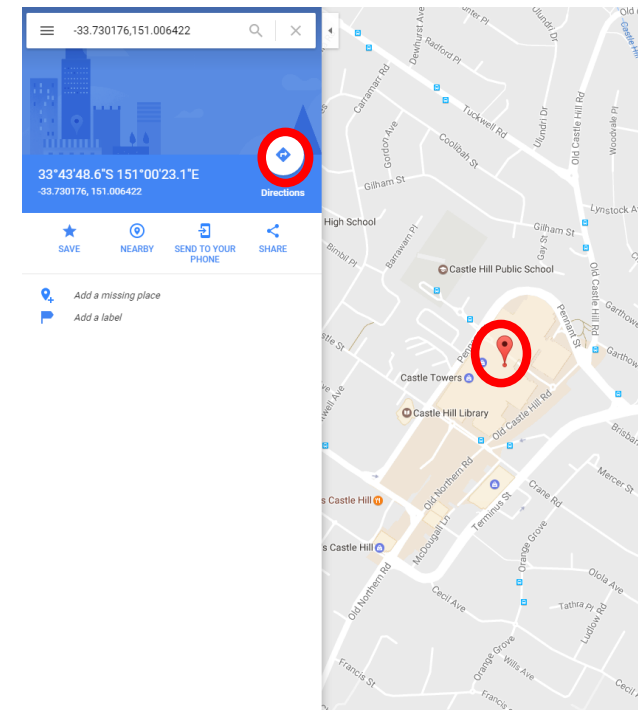
**CLOSE**

# Site Contact and Service Location



Next you will see the customer's site contact, with a clickable email or phone number link

Followed by the service location with the physical address and an interactive map link



Clicking on the map link will open the native mapping application on your PC to allow for specific directions and navigation to your customer's site

# The Issue and SLA

Below the service location you will find the reported issue and/or requested task

The Service Level Agreement (SLA) for the work order is listed next

Be aware that your customer will rate you on your ability to meet the SLA timeframes

The screenshot shows a customer communication interface. At the top, there is a header with a person icon, the word "CUSTOMER" in a dashed box, and icons for user, share, and menu. Below this is a scrollable message history with three entries, each from "CUSTOMER" and timestamped "3:11 PM". The first message is highlighted with a green border and contains: "The problem was reported as follows: Asset: Landscaping Task: Trees & Shrubs Additional Description: maintenance and replacement". The second message is also highlighted with a green border and contains: "The SLA for this Project priority work is: on-site by 06/29/2017 11:00 PM complete by 06/30/2017 3:00 AM You will be rated on your ability to meet this SLA". The third message contains: "You cannot invoice us more than \$250.00 for this work. Click **HERE** if you need this increased". At the bottom, there is a dropdown menu with "Cru" selected, a text input field with the placeholder "Type your message here", and a "SEND" button.

# NTE: Not to Exceed

Next, you will see the Not To Exceed (NTE) amount for this work order

The NTE is determined by the customer as a ceiling cost for the requested repair or service

If you need to request an increase to the NTE amount, click on the “HERE” link, the “Submit Quote” box will appear

The screenshot shows a customer communication window titled "CUSTOMER". The window contains a chat history with three messages from the customer, all timestamped at 3:11 PM. The first message states: "The problem was reported as follows: Asset: Landscaping, Task: Trees & Shrubs, Additional Description: maintenance and replacement". The second message states: "The SLA for this Project priority work is: on-site by 06/29/2017 11:00 PM, complete by 06/30/2017 3:00 AM, You will be rated on your ability to meet this SLA". The third message states: "You cannot invoice us more than \$250.00 for this work. Click [HERE](#) you need this increased". The word "HERE" in the third message is highlighted with a green box. At the bottom of the window, there is a dropdown menu with "Cru" selected, a text input field with the placeholder "Type your message here", and a "SEND" button.

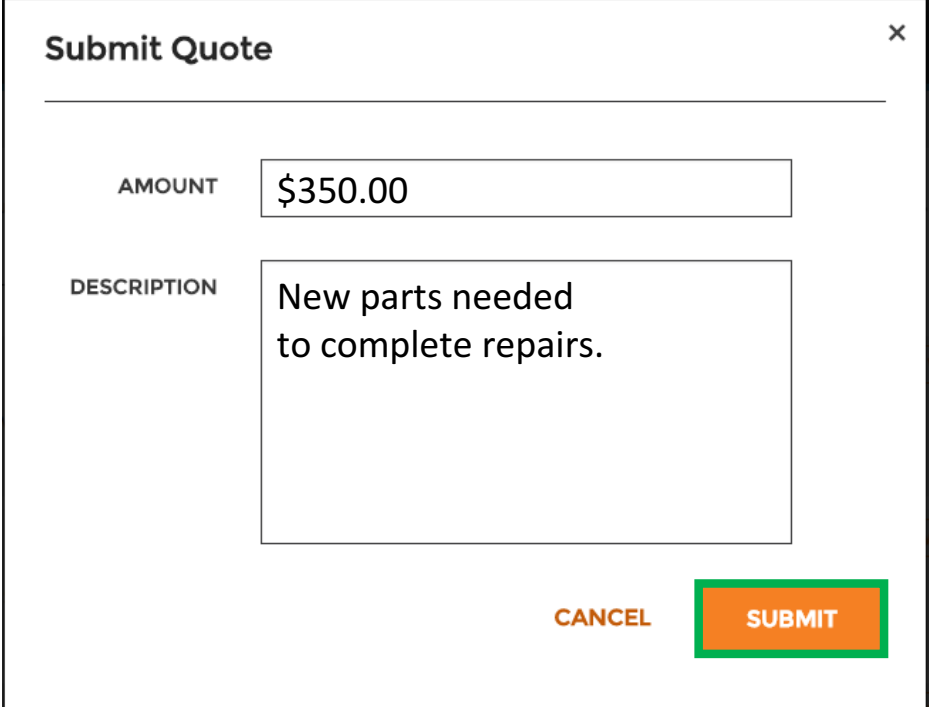
# Submitting a Quote

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Enter the quote amount for the requested service, and a description justifying the quote amount

Then click “SUBMIT”

The customer will be notified of the requested NTE increase and will have the opportunity to either accept or reject the quote



The screenshot shows a web form titled "Submit Quote" with a close button (X) in the top right corner. The form contains two input fields: "AMOUNT" with the value "\$350.00" and "DESCRIPTION" with the text "New parts needed to complete repairs.". At the bottom right of the form, there are two buttons: "CANCEL" and "SUBMIT". The "SUBMIT" button is highlighted with a green border.

# Accepted Quote and the New NTE

The details of the requested NTE increase are recorded, in real time, in the CruChat

In this example, the customer has approved the quote and the quote amount is now shown as the updated NTE amount

The screenshot shows a chat window titled "CUSTOMER" with a close button (X) in the top right corner. The chat history includes:

- A system message: "You will be rated on your ability to meet this SLA"
- A customer message: "Do you **ACCEPT** or **REJECT** WO #IAGO460001? Any questions? Send a message" (3:11 PM)
- A separator line with "Today" in the center.
- A message from James Favreau: "James Favreau submitted a quote for \$350.00. The current NTE is still \$250.00" (9:54 AM)
- A message from PRO: "PRO has approved the \$350.00 quote" (10:02 AM)
- A customer message: "You cannot invoice us more than **\$350.00** for this work. Click **HERE** if you need this increased" (10:02 AM)

The bottom of the chat window features a dropdown menu set to "Cru", a text input field with the placeholder "Type your message here", and a "SEND" button.

# Accepting a Work Order

At the bottom of the original CruChat work order details, you will be prompted to either “ACCEPT” or “REJECT” the work order

Click “ACCEPT” to accept the work order or “REJECT” to reject the work order

The action will be timestamped in the CruChat, and the customer will be notified that their work order has been accepted or rejected

If you accept a work order, a new available action to “CHECK IN” and begin the work will appear

The screenshot displays a chat window titled "CUSTOMER" with a dashed box around the title. The chat history includes:

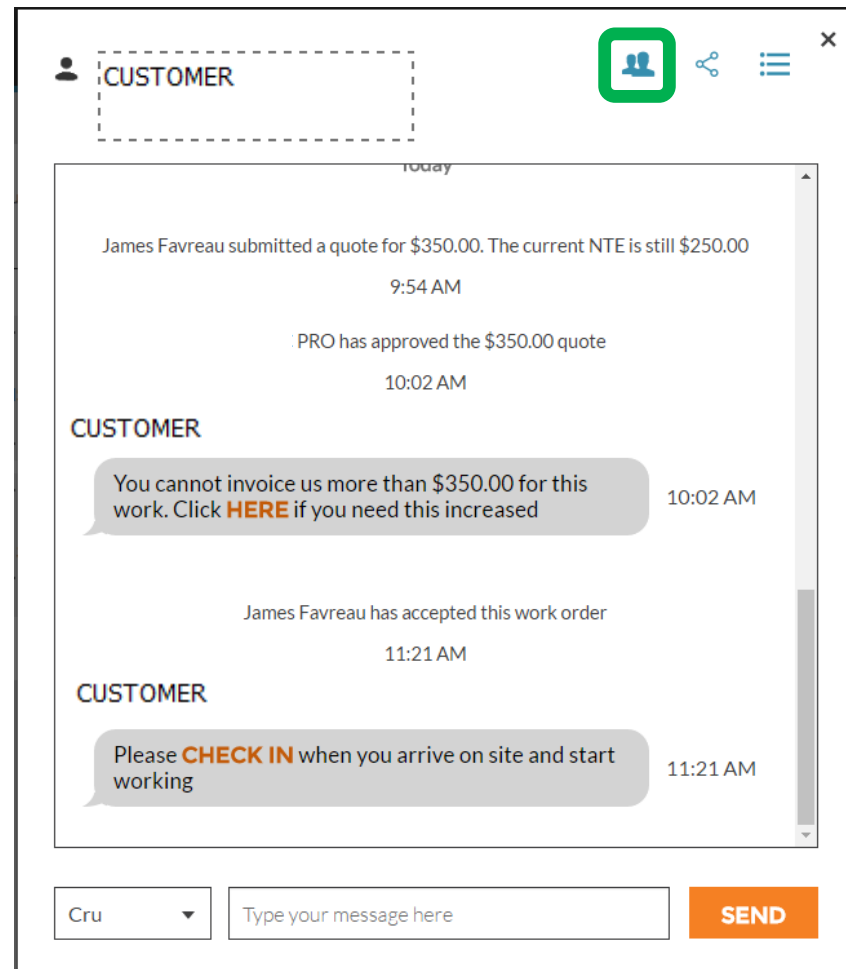
- A system message: "James Favreau submitted a quote for \$350.00. The current NTE is still \$250.00" at 9:54 AM.
- A system message: "PRO has approved the \$350.00 quote" at 10:02 AM.
- A customer message: "You cannot invoice us more than \$350.00 for this work. Click **HERE** if you need this increased" at 10:02 AM.
- A system message: "James Favreau has accepted this work order" at 11:21 AM, highlighted with a green border.
- A customer message: "Please **CHECK IN** when you arrive on site and start working" at 11:21 AM, also highlighted with a green border.

The chat interface includes a header with a user icon, a share icon, and a menu icon. At the bottom, there is a dropdown menu set to "Cru", a text input field with the placeholder "Type your message here", and a "SEND" button.

# Assigning a Work Order

When a work order is accepted it can be assigned to a field technician or a Sub to complete the work

Click on the two-person silhouette icon at the upper right of the CruChat



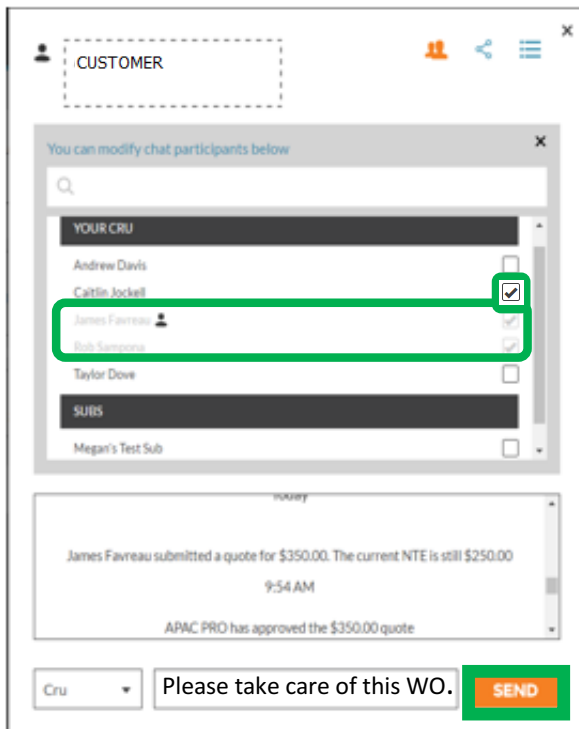
The screenshot displays a chat window titled "CUSTOMER" with a dashed box around the name. In the top right corner, there is a green icon of two people, a share icon, a menu icon, and a close icon. The chat history shows the following messages:

- 9:54 AM: James Favreau submitted a quote for \$350.00. The current NTE is still \$250.00
- 10:02 AM: PRO has approved the \$350.00 quote
- 10:02 AM: CUSTOMER: You cannot invoice us more than \$350.00 for this work. Click **HERE** if you need this increased
- 11:21 AM: James Favreau has accepted this work order
- 11:21 AM: CUSTOMER: Please **CHECK IN** when you arrive on site and start working

At the bottom, there is a dropdown menu with "Cru" selected, a text input field with the placeholder "Type your message here", and a "SEND" button.



# Assigning a Work Order



CruMembers and connected Subs will appear, see the example on the left

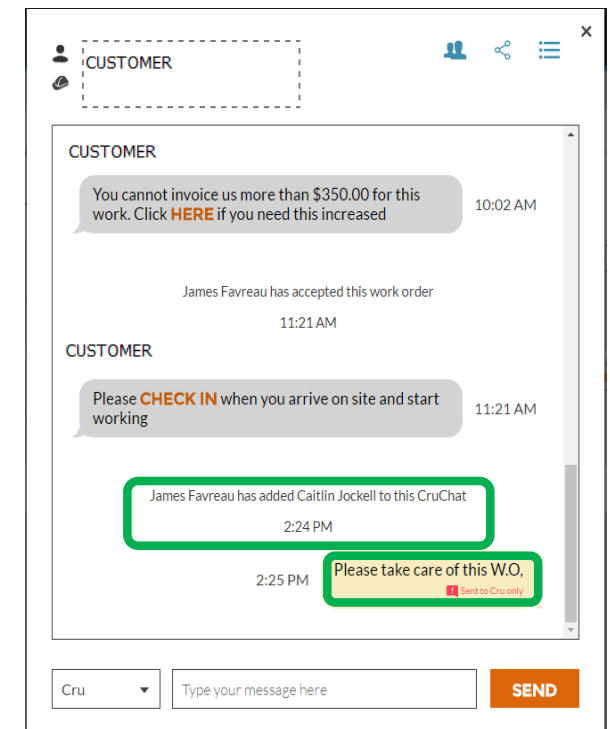
Names that are grayed-out are CruLeads which are automatically included on all CruChats

To assign work, click the checkbox to the right of the desired Sub or CruMember's name

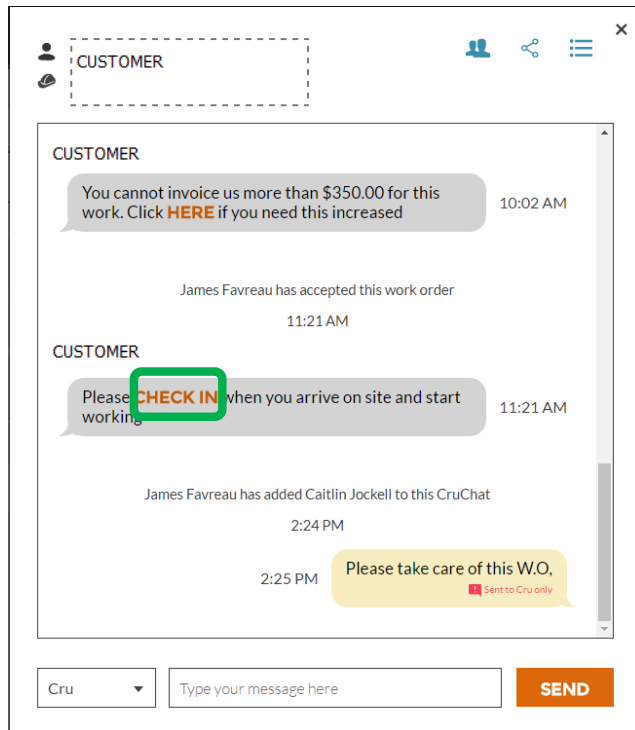
Enter a CruChat text message and click "Send"

The CruChat reflects the added CruMember and assignment of the work order

The work order is now assigned



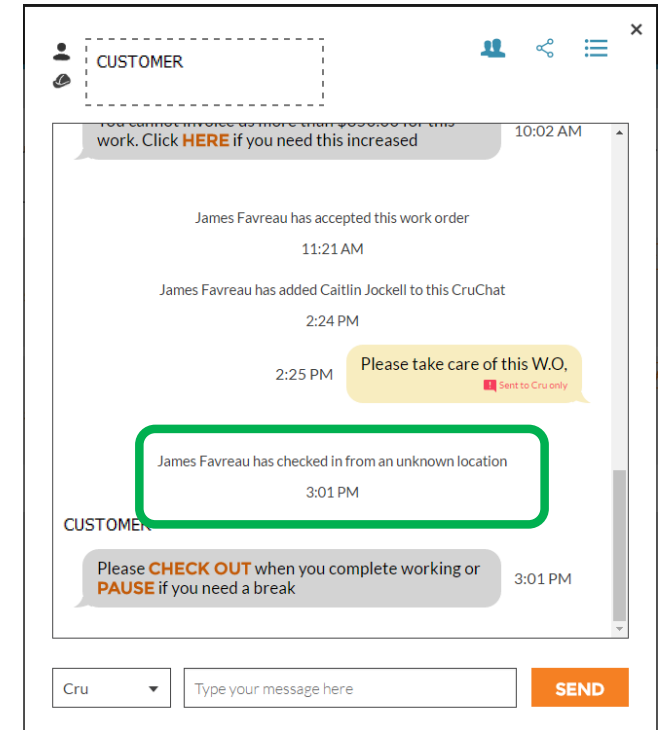
# Checking In to START the Work Order



When a CruMember or Sub is assigned a work order, they will be required to check-in to start the work order

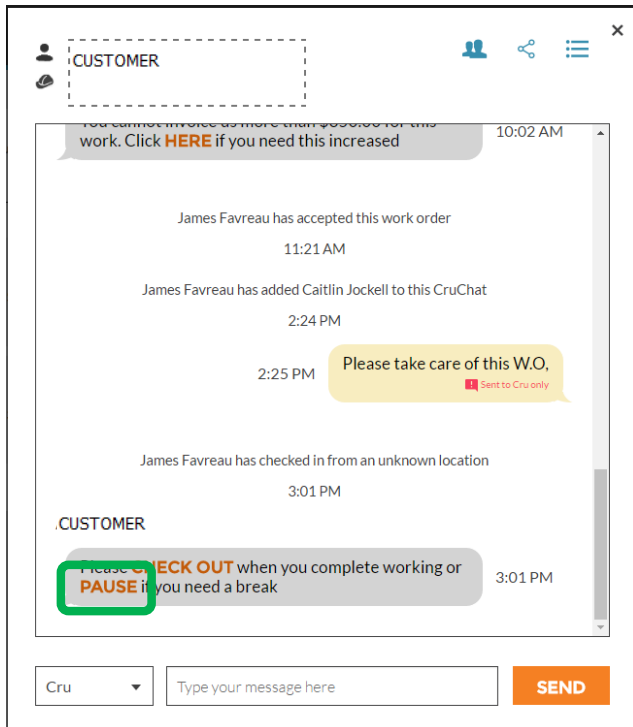
If in the Desktop, click orange "CHECK IN" to start the work order

The CruChat will update with a note indicating the location of the person that has checked in and begun work



The customer will know that the technician was within a certain proximity to the site when checking in, and it begins to track time so that both the customer and service provider know how long it takes to complete the job

# Pausing a Work Order

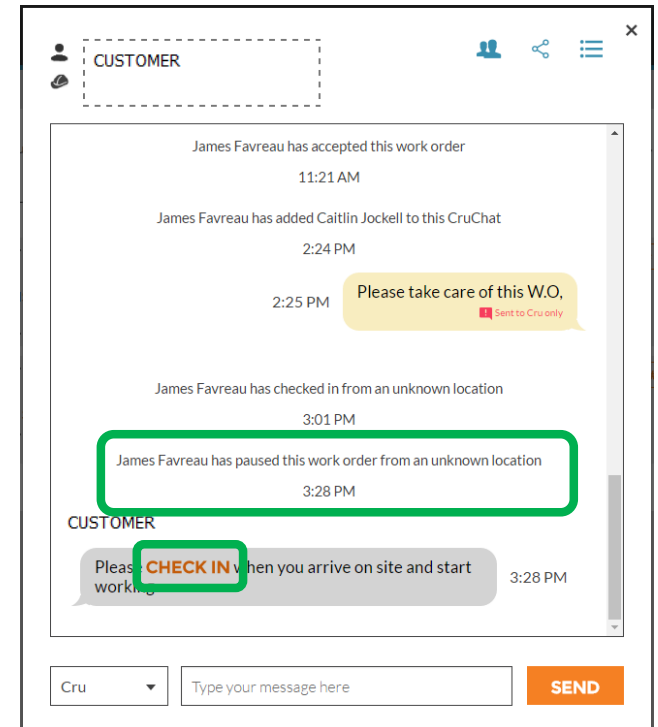


Sometimes you will need to pause the work order if the technician takes a break or leaves the site at the end of the day on a multi-day project

Click the orange "PAUSE" link

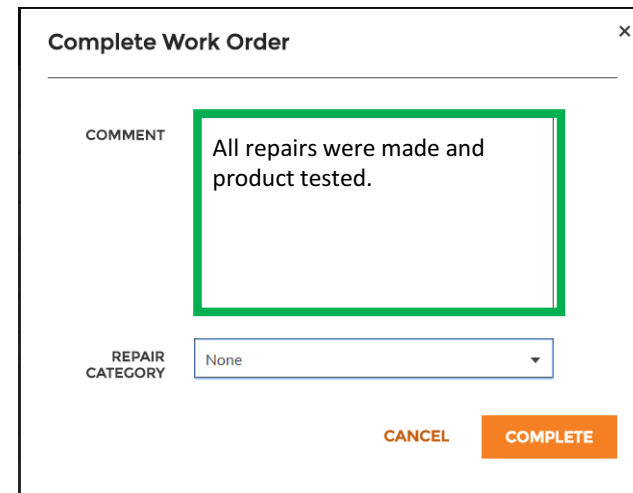
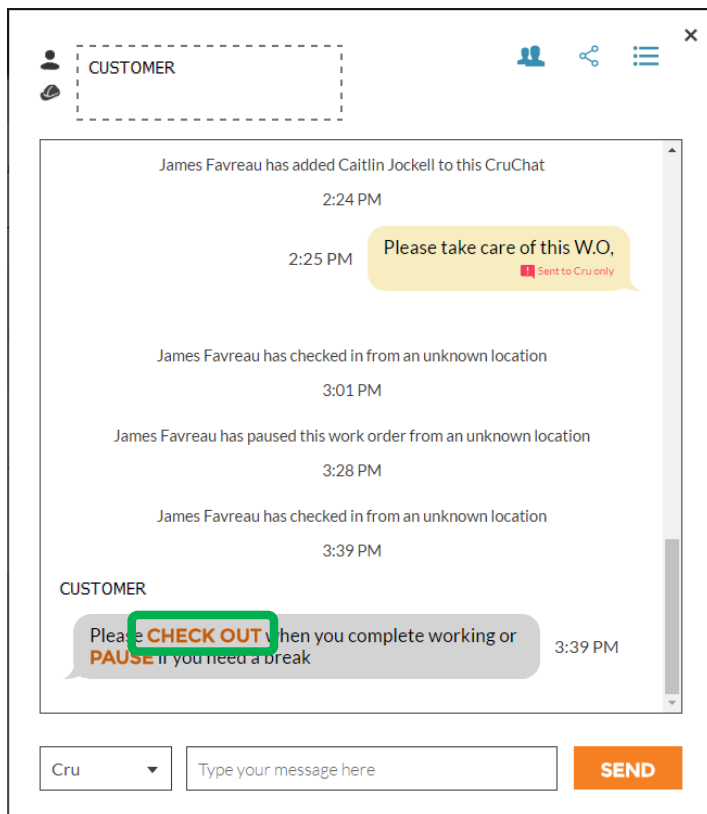
Once again the CruChat will be noted to record that the work order has been paused

When the technician is ready to recommence work they click on "CHECK IN"



# Checking Out and Completing the Work Order

When the work is completed, click on the orange “CHECK OUT” link



The “Complete Work Order” window will open where you should enter detailed comments about the work that was completed - these comments will be a valuable source of information and record for both you and your customer

# Repair Category and Repair Code

After entering your comments, select a “REPAIR CATEGORY” by clicking and accessing the repair category list

**Complete Work Order** x

COMMENT

REPAIR CATEGORY: None

CANCEL COMPLETE

- \*Not a Failure
- Equip>Catastrophic Event
- Equip>Commissioning
- Equip>Electrical**
- Equip>Environmental
- Equip>Human
- Equip>Hydraulic/Steam Systems
- Equip>Liquid Ingress
- Equip>Lubrication
- Equip>Machine Setup
- Equip>Mechanical
- Equip>Operation
- Equip>Pneumatic
- Equip>Process

**Complete Work Order** x

COMMENT: All repairs were made and product tested.

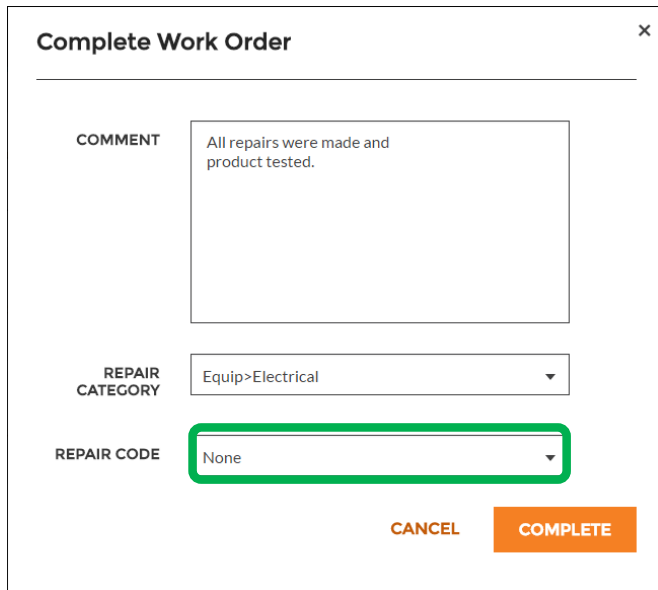
REPAIR CATEGORY: Equip>Electrical

REPAIR CODE: None

CANCEL COMPLETE

# Repair Category and Repair Code

Then you will do the same for the  
“REPAIR CODE”



**Complete Work Order** [X]

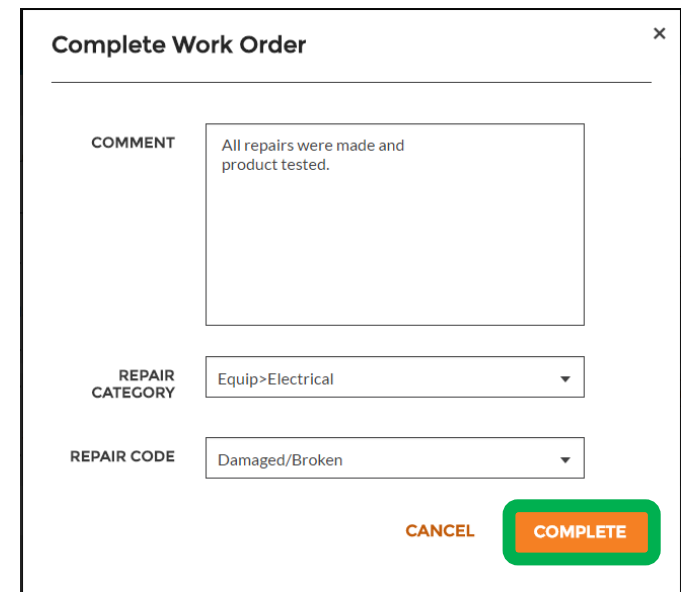
**COMMENT**  
All repairs were made and product tested.

**REPAIR CATEGORY**  
Equip>Electrical

**REPAIR CODE**  
None

**CANCEL** **COMPLETE**

- Abnormal Temperature
- Arcing
- Battery Sulfation
- Cable Joint Failure
- Closed (Circuit)
- Coil/Solenoid Failure
- Damaged/Broken**
- Delamination/Exfoliation
- Dirt or Contamination
- Discharged
- Grounding/Earthing Problem
- Harmonic Distortion
- High Resistance
- Inaccurate Signal



**Complete Work Order** [X]

**COMMENT**  
All repairs were made and product tested.

**REPAIR CATEGORY**  
Equip>Electrical

**REPAIR CODE**  
Damaged/Broken

**CANCEL** **COMPLETE**

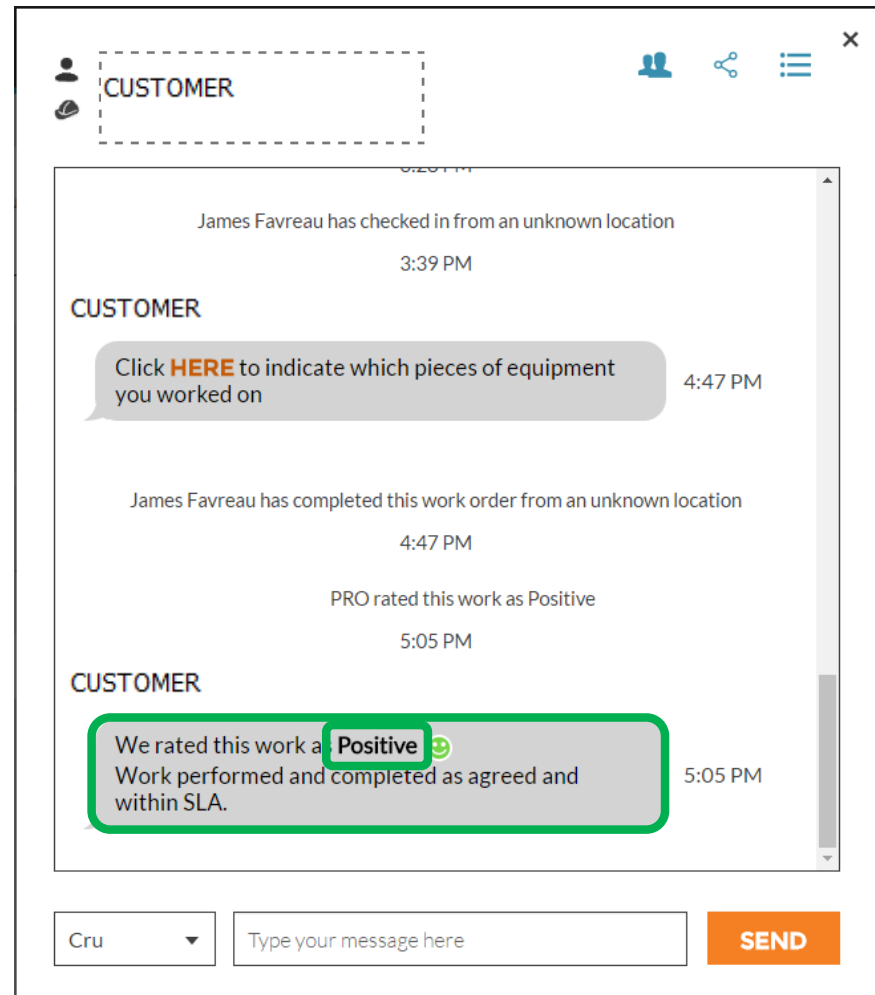
And click “COMPLETE”

# Verifying and Rating the Work

When the technician has checked out and the work order has been completed, the customer will receive notification

Customers may rate the work during their verification process, and the rating will appear, with comments, in the CruChat verification message

If your customer has implemented the verification step as a requirement in the work order process, you will only be able to invoice the customer once their verification and work rating have been completed



The screenshot displays a chat window titled 'CUSTOMER'. The chat history includes the following messages:

- James Favreau has checked in from an unknown location (3:39 PM)
- CUSTOMER: Click **HERE** to indicate which pieces of equipment you worked on (4:47 PM)
- James Favreau has completed this work order from an unknown location (4:47 PM)
- PRO rated this work as Positive (5:05 PM)
- CUSTOMER: We rated this work as **Positive** 😊. Work performed and completed as agreed and within SLA. (5:05 PM)

The 'Positive' rating and the customer's comment are highlighted with a green border. At the bottom of the chat window, there is a 'Cru' dropdown menu, a text input field labeled 'Type your message here', and a 'SEND' button.

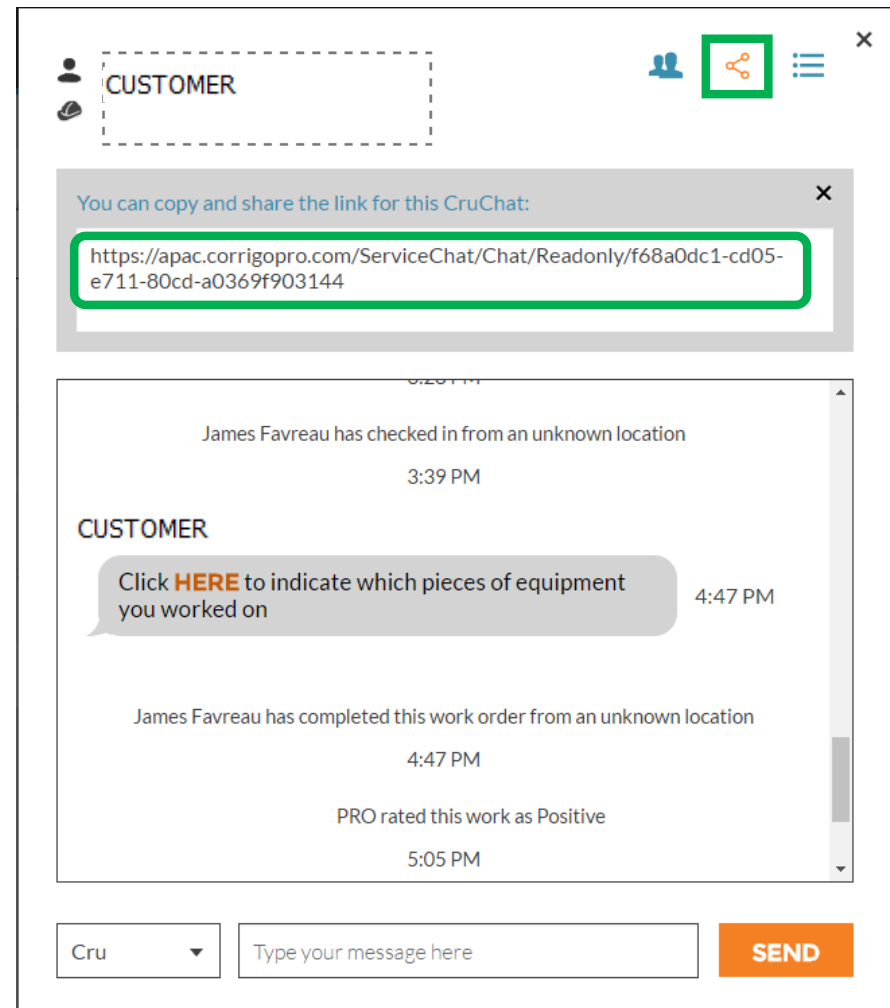
# The CruChat Link

To share a CruChat conversation via email or text, click on the link icon at the upper right of the CruChat window

This will generate an active CruChat link which you can copy and paste

Since the link is live, it will always show the current conversation - if the conversation continues, open the link again to see the new content

This is a powerful tool for archiving CruChat conversations or referencing specific work orders and details



The screenshot displays the CruChat interface. At the top left, there is a 'CUSTOMER' label next to a person icon. At the top right, there is a link icon (a square with a chain link) highlighted with a green box, along with a close button (X) and a menu icon (three horizontal lines). Below this, a notification box states 'You can copy and share the link for this CruChat:' followed by a URL: <https://apac.corrigopro.com/ServiceChat/Chat/ReadOnly/f68a0dc1-cd05-e711-80cd-a0369f903144>. The URL is also highlighted with a green box. The main chat area shows a scrollable history of messages: 'James Favreau has checked in from an unknown location' at 3:39 PM; 'CUSTOMER' message: 'Click **HERE** to indicate which pieces of equipment you worked on' at 4:47 PM; 'James Favreau has completed this work order from an unknown location' at 4:47 PM; and 'PRO rated this work as Positive' at 5:05 PM. At the bottom, there is a dropdown menu with 'Cru' selected, a text input field with the placeholder 'Type your message here', and a 'SEND' button.



# Questions

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Contact Corrigo via phone or online:

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