



**CORRIGOPRO**

## Communicating using CruChats

Using and Managing CruChats through the CorrigoPro  
Desktop and Mobile App

# During this tutorial we will cover...

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- Reviewing CorrigoPro Desktop CruChats: Slides 3 – 7
- Initiating CruChats from CorrigoPro Desktop: Slides 8 – 12
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# CorrigoPro Desktop CruChats

CruChats are instant communications between you, your team, your business partners, and your customers

Begin by clicking on the CorrigoPro tile in the CorrigoPro Desktop

The screenshot displays the CorrigoPro Desktop interface with several key components:

- Top Banner:** Promotes the latest updates from CorrigoPro with a "Learn More" button. It lists features: "Accept/reject work orders via email", "Capture customer signatures on your mobile device", and "Plus, so much more".
- Left Column:**
  - CorrigoPro Profile:** Shows the CorrigoPro logo and "David's HVAC" with a congratulatory message: "CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE".
  - Account Management:** A button labeled "MY CORRIGO BILLING ACCOUNT" with a folder icon.
- Right Column (Summary Dashboard):**
  - Key Metrics:**

WOs Awaiting Acceptance	▲	6
WOs Overdue	▲	79
Open Reactive WOs		71
Open PM/RM WOs		2
Waiting for WO Completion Det...		0
  - WOs BY STATUS (LAST 90 DAYS):** A pie chart showing the distribution of work orders: 35 Open (yellow), 7 Open: In Progress (orange), and 4 Completed (green).
  - Performance:** A badge showing a "72 your average score" with a gear icon.
  - Customer Connection:** A badge showing "2 customers are connected to you" with a link icon.
- Bottom Section:**
  - Invoice Attention:** A section titled "YOUR INVOICES NEED ATTENTION" with three categories: "33 ready to be invoiced WOs", "27 draft invoices", and "0 disputed invoices".
  - Integration:** A section titled "INTEGRATE YOUR WORK ORDER SYSTEM DIRECTLY TO corrigo" with the logo "Powered by CORRIGOPRO DIRECT".

# CorrigoPro Desktop CruChats

This is the CruChat landing page where you will have multiple filter options, to sort and view CruChats by specific categories

The screenshot displays the CorrigoPro Desktop CruChats interface. At the top, there is a dark navigation bar with a home icon, the text 'CORRIGOPRO', and user information 'Waldo David at David's HVAC'. A search bar is located on the left, and a filter bar is in the center. The filter bar includes 'STATUS: Any', 'WO STATE: Waiting for Acceptance', and 'COMPLETE BY: Any'. On the right, there is a menu icon and a sort dropdown set to 'Ordered by: Last Activity Date'. Below the filter bar, two work order entries are shown. Each entry includes a user icon, a title, address, status, and a note.

Environment	Work Order Title	Address	Work Order Number	Status	Priority	Day	Note
APAC Demo	E.ON Highways Lighting Oldh...	E.ON Highways Lighting Oldham & Rochdale 4870 Sadler Road, Suite 300, Glen Allen, VA 23061, US	WO# EOHLOR0001	WAITING FOR ACCEPTANCE	SCHEDULED	Thursday	Unable to accept this work order since it has a different status on the customer side.
Stage JLL IAG	Sydney - 388 George St	388 George Street - Level 22 1111 Alderman Drive, Alpharetta, GA 30005, US	WO# CORR0073	WAITING FOR ACCEPTANCE	URGENT	Thursday	Unable to accept this work order since it has a different status on the customer side.



# CorrigoPro Desktop CruChats

Work orders can be filtered by a number of options. As an example, you can sort using “Unread” from the Status menu, and “This Week” from the Complete By menu

The screenshot displays the CorrigoPro desktop interface. At the top, the user is identified as 'Waldo David' at 'David's HVAC'. The main navigation bar includes a search bar for 'Search Chats' and several filter menus: 'STATUS: Any', 'WO STATE: Waiting for Acceptance', and 'COMPLETE BY: Any'. A dropdown menu is open over the 'COMPLETE BY' filter, showing options: 'Today', 'Tomorrow', 'Yesterday', 'This Week', 'Next Week', 'Last Week', and 'Custom Range'. The 'Unread' option is highlighted in the 'STATUS' dropdown menu. The main content area shows a list of work orders. The first work order is 'E.ON Highways Lighting Oldham & Rochd' with status 'SCHEDULED' and due on Thursday. The second and third work orders are 'Sydney - 388 George St' with status 'WAITING FOR ACCEPTANCE' and 'HIGH', both due on Thursday. The interface also shows a search bar for 'Search Chats' and a 'Clear selected' button.

# CorrigoPro Desktop CruChats

In this example, a single CruChat remains when filtering by “Unread” and “This Week”

The screenshot displays the CorrigoPro desktop interface. At the top, the navigation bar includes a home icon, the text 'CORRIGOPRO', and the user name 'James Favreau'. Below the navigation bar, the main content area features a search bar labeled 'Search Chats' and a filter section. The filter section includes a 'Status' dropdown menu set to 'Unread', a 'WO State' dropdown menu set to 'Any', and a 'Complete By' dropdown menu set to 'This Week'. To the right of the filter section is a 'MORE...' dropdown menu and the user's name 'James Fav...' with a phone number '+1 303-525-3640'. Below the filter section, the chat list is ordered by 'Last Activity Date'. A single chat is visible, highlighted with a green border. The chat header shows a profile card for 'PRO' with the address '181 William St, Melbourne, VIC 3000, AU' and a 'New WO# IAG0100084 waiting for your attention' message. The chat details include 'WO# IAG0100084', 'URGENT', and 'Friday'. The chat body contains the message 'New WO# IAG0100084 waiting for your attention' and the name 'APAC PRO'.

Click anywhere on the CruChat to view the body of the message and/or the details of the work order

# CorrigoPro Desktop CruChats

The screenshot displays the CorrigoPro Desktop CruChats interface. The main window is titled "APAC Demo" and shows a chat history with several messages. The first message is a service location card for "CORRIGOPRO OFFICE" at "1111 ALDERMAN DRIVE, SUITE 210, ALPHARETTA, GA 30005". The second message states: "The problem was reported as follows: Asset: Building/Structure Repair & Maintenance>General Door Repair Task: Glass Door - Interior Additional Description: Needs to be replaced". The third message provides SLA information: "The SLA for this High priority work is: accept/reject by 06/04/2018 9:00 AM on-site by 06/04/2018 1:00 PM complete by 06/04/2018 3:00 PM You will be rated on your ability to meet this SLA". The fourth message says: "You cannot invoice us more than \$250.00 AUD for this work. Click [HERE](#) if you need this increased". At the bottom, there is a text input field with a green border containing the placeholder text "Type your message or drag and drop files" and a "SEND" button.

Waldo David at David's HVAC

APAC Demo

WO# Cor0053 Open: In Progress

HIGH

APAC Demo, 1:07 AM

SERVICE LOCATION

CORRIGOPRO OFFICE

1111 ALDERMAN DRIVE, SUITE 210, ALPHARETTA, GA 30005

APAC Demo, 1:07 AM

The problem was reported as follows:  
Asset: Building/Structure Repair & Maintenance>General Door Repair  
Task: Glass Door - Interior  
Additional Description: Needs to be replaced

APAC Demo, 1:07 AM

The SLA for this High priority work is:  
accept/reject by 06/04/2018 9:00 AM  
on-site by 06/04/2018 1:00 PM  
complete by 06/04/2018 3:00 PM  
You will be rated on your ability to meet this SLA

APAC Demo, 1:07 AM

You cannot invoice us more than \$250.00 AUD for this work. Click [HERE](#) if you need this increased

All

Type your message or drag and drop files

SEND

Ordered by: Last Activity Date

IN PROGRESS HIGH Yesterday

COMPLETED STANDARD Monday

COR0052 OPEN HIGH Thursday

OR0051 OPEN URGENT Thursday

To send a message in this CruChat, just type your message in the text box, then click "Send"

# Initiating a CruChat

You may initiate a CruChat with your Cru/Subs , but you CANNOT initiate a CruChat with a customer, this has to be initiated by the customer

The screenshot displays the CORRIGOPRO interface. At the top right, the user 'Waldo David' is logged in at 'David's HVAC'. A green box highlights the 'Our Cru' icon in the top navigation bar. Below the navigation bar, there is a search bar for 'Search Chats' and filters for 'STATUS: Any', 'WO STATE: Any', and 'COMPLETE BY: Any'. The chat list is ordered by 'Last Activity Date'. Three chat entries are visible, each for 'CorrigoPro Office' (Alpharetta Office, 1111 Alderman Drive, Suite 210, Alpharetta, Ga 30005, US). The first chat (WO# COR0053) is 'OPEN: IN PROGRESS' and 'HIGH' priority, dated 'Yesterday', with the message 'Please check out when you complete working or pause if you need a break'. The second chat (WO# COR0054) is 'COMPLETED' and 'STANDARD' priority, dated 'Monday', with the message 'You can start managing invoice for this WO'. The third chat (WO# COR0052) is 'OPEN' and 'HIGH' priority, dated 'Thursday', with the message 'Please check in when you arrive on site and start working'.

To start a CruChat with your CruMembers and/or CruLeads, click on the **Our Cru** icon in the upper right

# Start a CruChat

Waldo David at David's HVAC

Search Cru

Filter By **CruLeads** **CruMembers**

Ordered by: Name (A-Z)

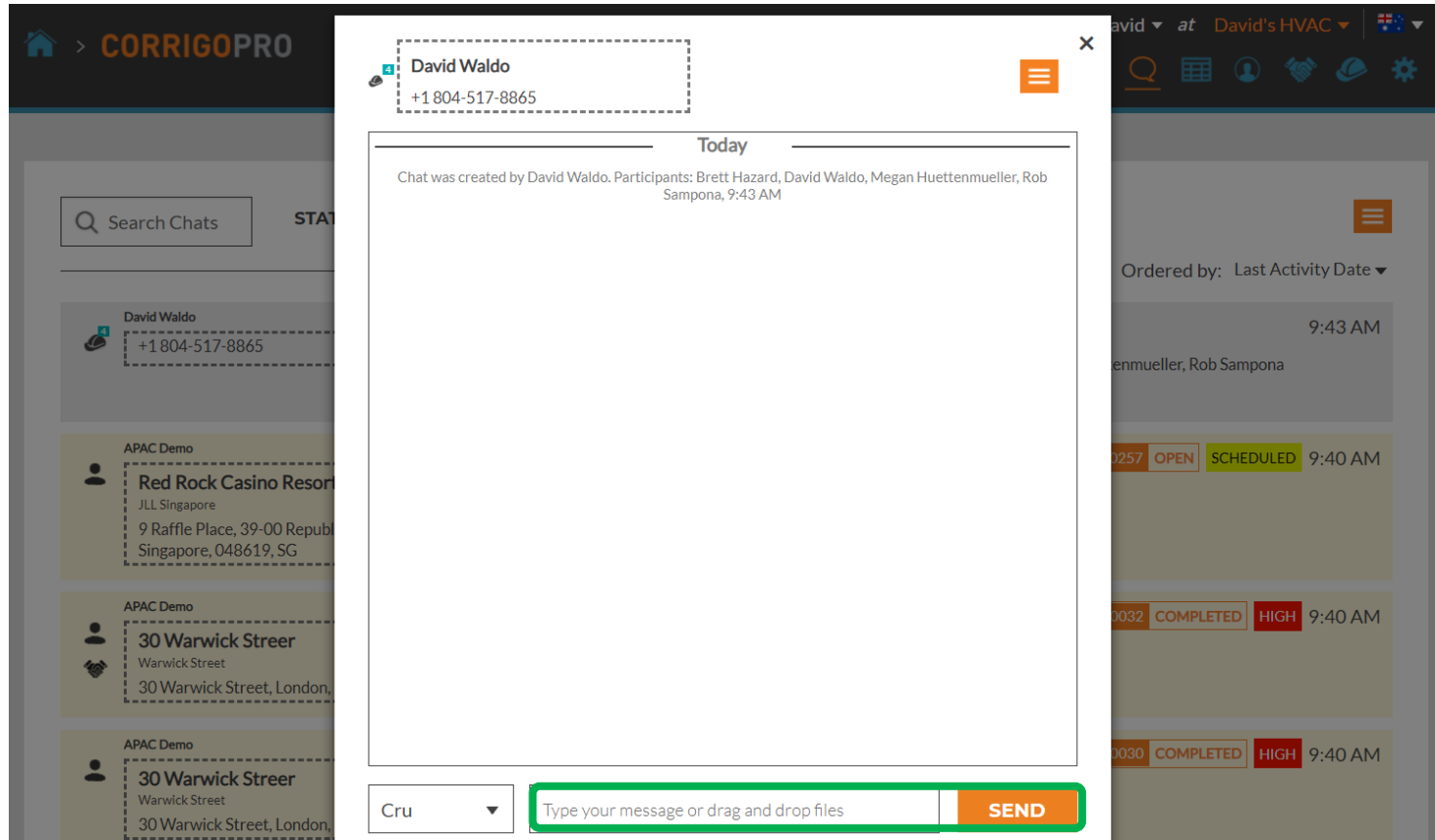
3 mobile user(s) are selected **SELECT ALL USERS** or **SELECT NONE**

**CRUCHAT** REINVITE CHANGE ROLE DELETE

	<b>Alister Forbes</b> 0423 929 173 CruMember	<b>Brett Hazard</b> +1 216-533-8203 CruMember	<b>David Waldo</b> +1 804-517-8865 CruLead
<b>Dmytro Tech</b> +1 650-222-7005 CruMember	<b>Megan Huettenmu...</b> +1 913-706-8739 CruMember	<b>Rob Sampona</b> +1 770-560-5884 CruMember	<b>Thomas Fowler</b> +1 404-557-2169 CruMember

Check the box for CruMembers that you'd like to include in the CruChat, then click the "CRUCHAT" button near the top of the window

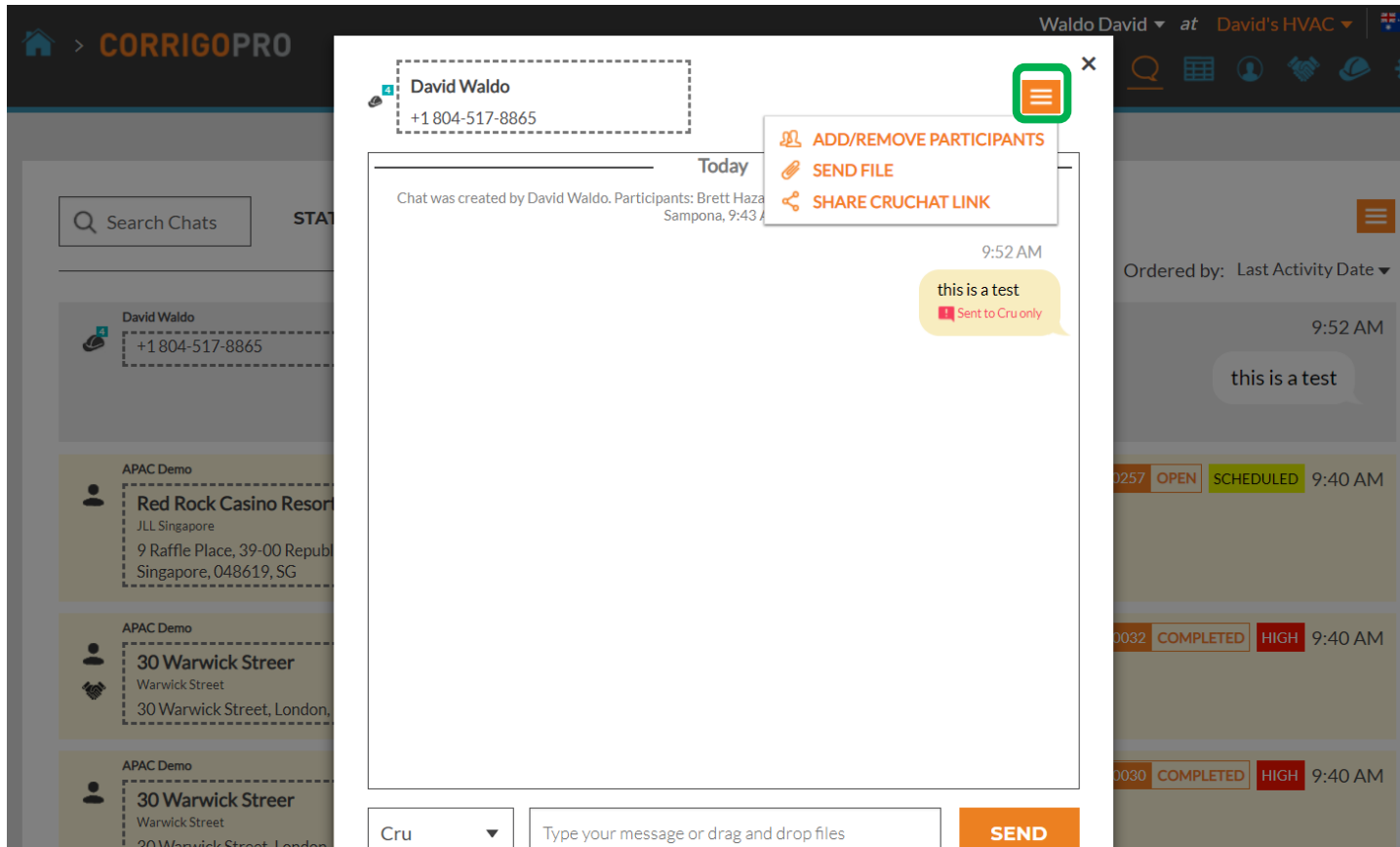
# Congratulations!



You have successfully initiated a CruChat with you team  
You now have a real-time, interactive communication with your Cru  
To begin the discussion, type your message in the text box  
Click "SEND"

# Adding and Removing CruChat Participants

You can add or remove CruMembers and Subcontractors in any CruChat



To add or remove a participant in your chat, click the drop down box, click ADD/REMOVE PARTICIPANTS

# Adding and Removing CruChat Participants

The screenshot shows the CORRIGOPRO interface with a chat participant management window open. The window title is "David Waldo" with the phone number "+1 804-517-8865". Below the title, it says "You can modify chat participants below". There is a search bar and a list of participants under the heading "YOUR CRU". The participants listed are Alister Forbes, Brett Hazard, David Waldo (with a person icon), Dmytro Tech, Megan Huettenmueller, Rob Sampona, and Thomas Fowler. To the right of each name is a checkbox. A green rectangular box highlights these checkboxes. Below the list, there is a text area showing "Chat was created by David Waldo. Participants: Brett Hazard, David Waldo, Megan Huettenmueller, Rob Sampona, 9:43 AM". Below the text area is a message input field with a "Cru" dropdown, a text input field containing "Type your message or drag and drop files", and a "SEND" button. The background shows a chat interface with a message "this is a test" sent at 9:52 AM.

A scrollable drop-down box will open with your Cru and Subs listed

Select or deselect your CruChat participants by clicking the individual check boxes on the right



# CruChats With Work Orders

CruChats from your Corrigo customers may have a work order included

The screenshot displays the CorrigoPro interface. At the top, the user is identified as 'Waldo David' at 'David's HVAC'. The interface includes a search bar for chats and filters for status (Unread), work order state (Any), and completion date (Any). The chat list is ordered by 'Last Activity Date'. Three chat entries are shown, each from 'CorrigoPro Office' in Alpharetta, GA. Each entry includes a message: 'Please check in when you arrive on site and start working'. The first entry is highlighted with a green box and shows a work order 'WO# COR0052' with 'OPEN' status and 'HIGH' priority. The second and third entries show work orders 'WO# COR0051' and 'WO# COR0050' respectively, both with 'OPEN' status and 'URGENT' priority.

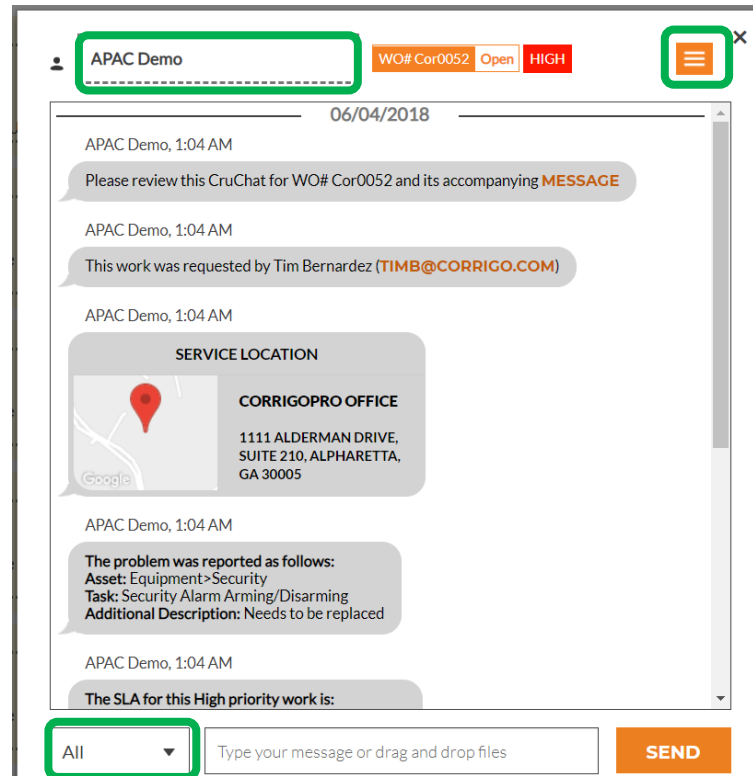
A CruChat with a work order associated with it will have an orange box with the work order number, status, and a color coded box with the priority level indicated

Click on a work order CruChat to open the CruChat window and review the work order details

# CruChats With Work Orders

Customer is indicated on the left side of the CruChat

You can choose which participants receive your CruChat messages by clicking on the menu to the left of the message box.



As with any CruChat, you may add or remove participants by clicking the drop down box in the right corner of the CruChat.

CruChat participant group options will appear.

Choose Participants: located at the bottom left of the screen

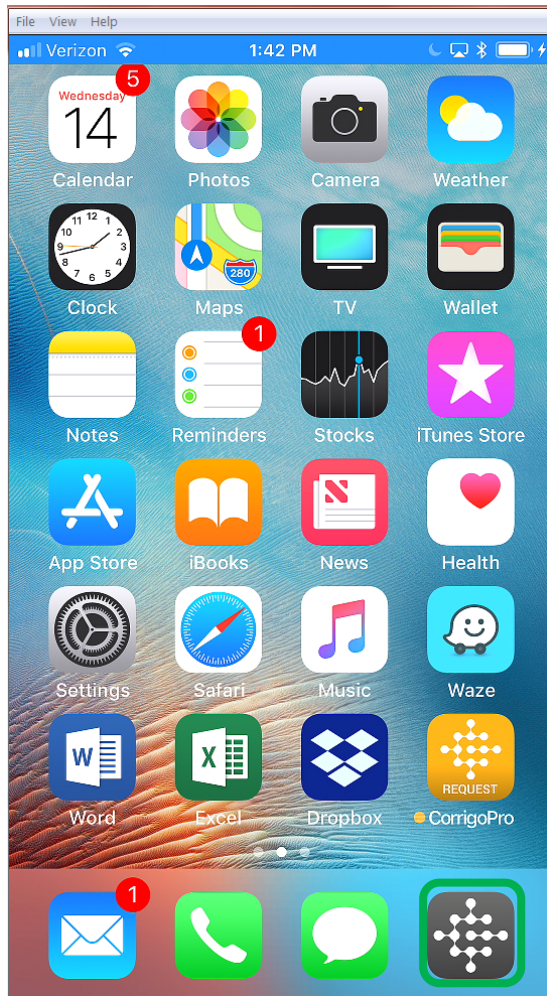
Cru - Cru Only

Cru+Subs – Cru and Subs

All - Cru and Subs and Customer

# CorrigoPro Mobile App: CruChats

You can manage all of your CruChats and work orders from your mobile device

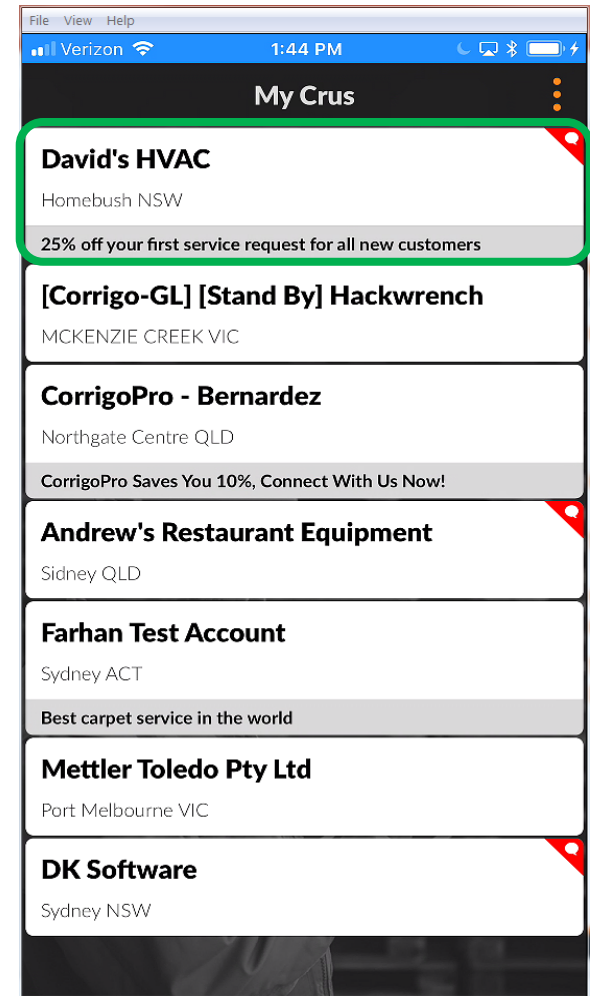


Install CorrigoPro mobile app

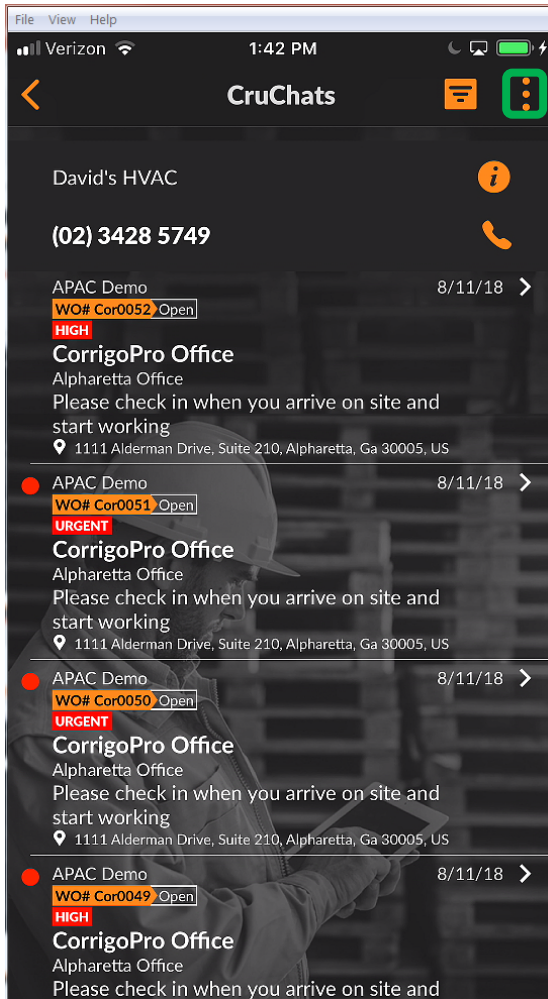
Tap to open the app

Your Crus will appear on the first screen

Tap on a Cru to access the related CruChats and options

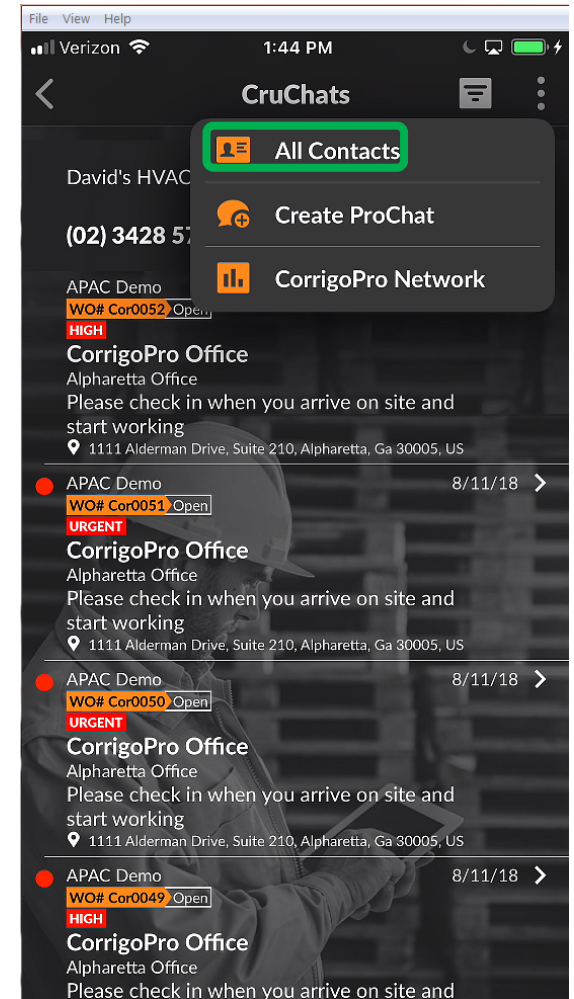


# CorrigoPro Mobile App: CruChats



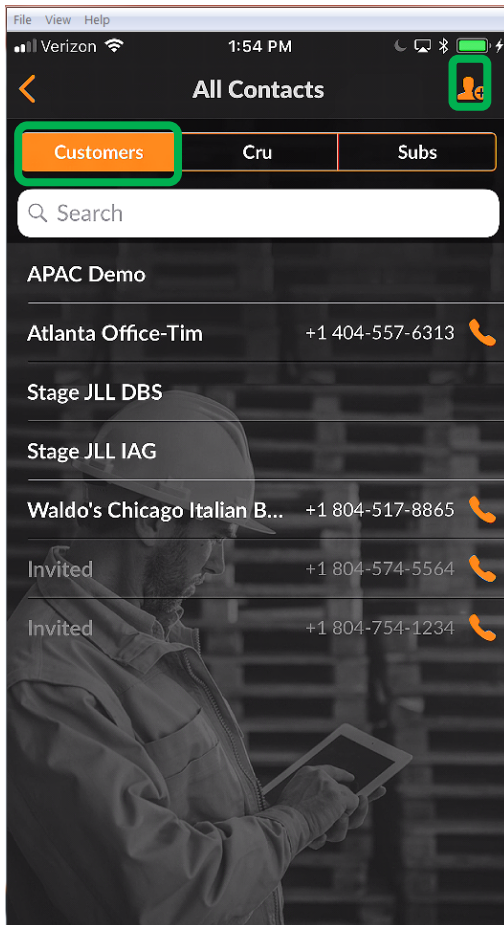
To invite someone to connect, tap on the 3 dots in the upper right of the screen, may appear differently for Android devices

Click on "All Contacts"





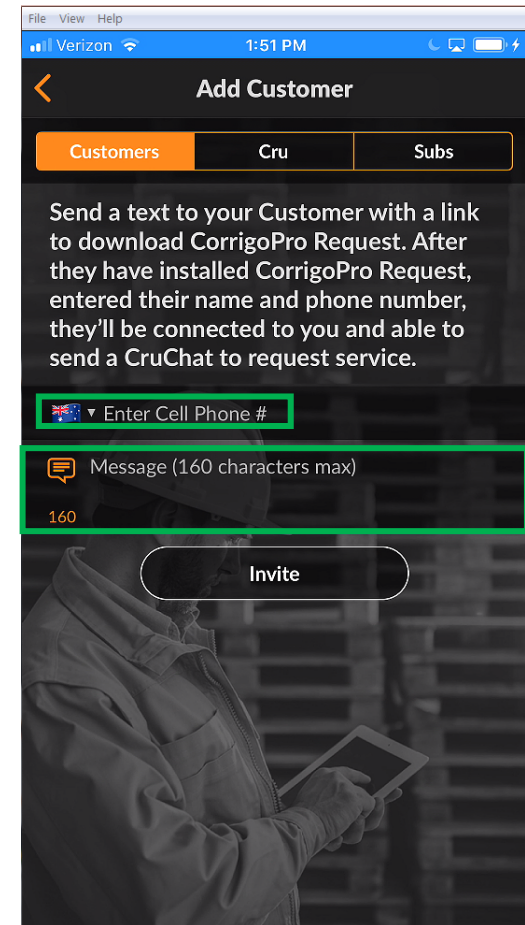
# CorrigoPro Mobile App: Invite A Customer



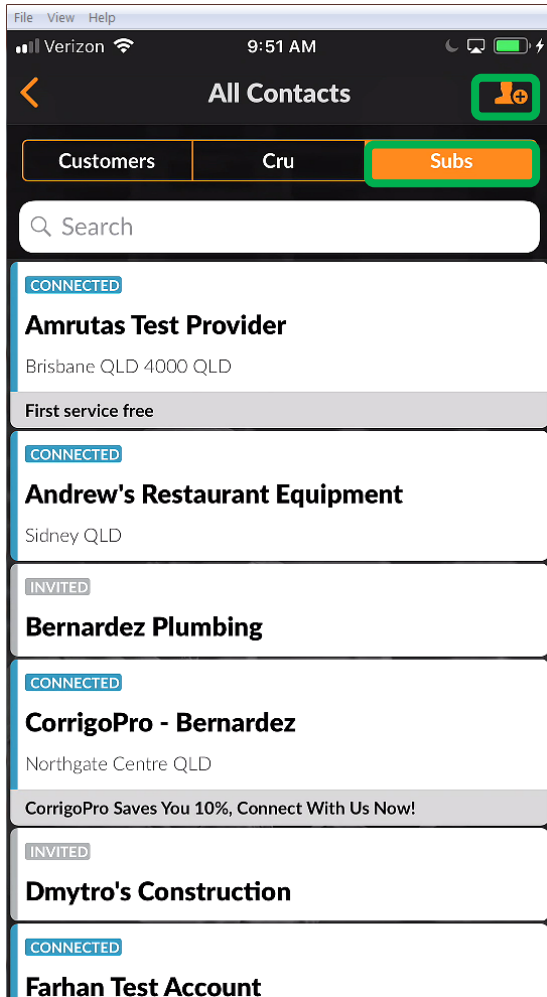
To invite a customer to connect, tap on the “CUSTOMERS” tab  
Tap on the orange silhouette  
Enter your customer’s mobile phone number, add a brief message, and tap “Invite”

Your customer will receive a text message invitation with a link to download the CorrigoPro Request App

Your customer will receive a text message invitation with a link to download the CorrigoPro Request App



# CorrigoPro Mobile App: Invite A Subcontractor (Sub)



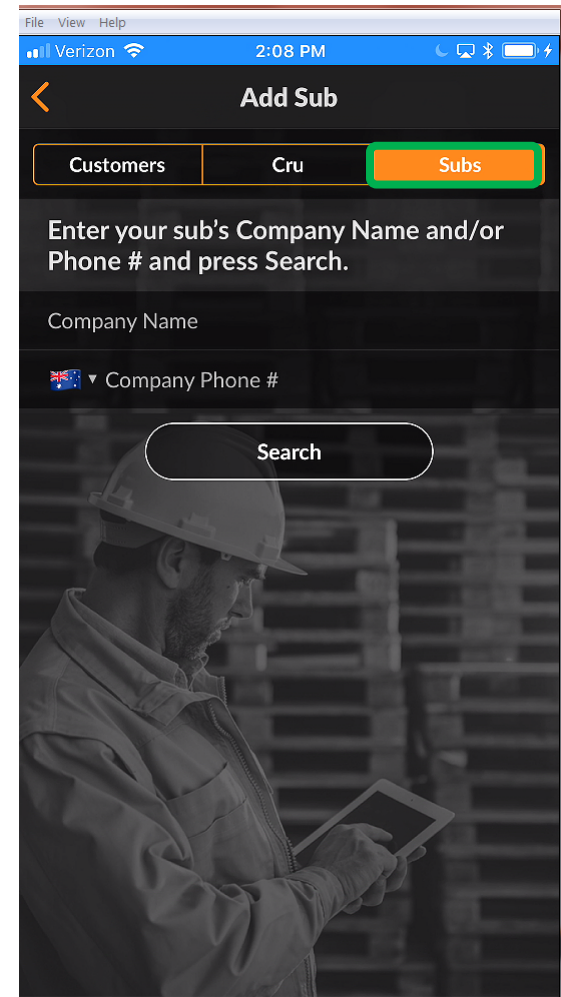
To invite a sub to connect, from the All Contacts screen, tap on "Subs" tab

Next tap on the orange silhouette

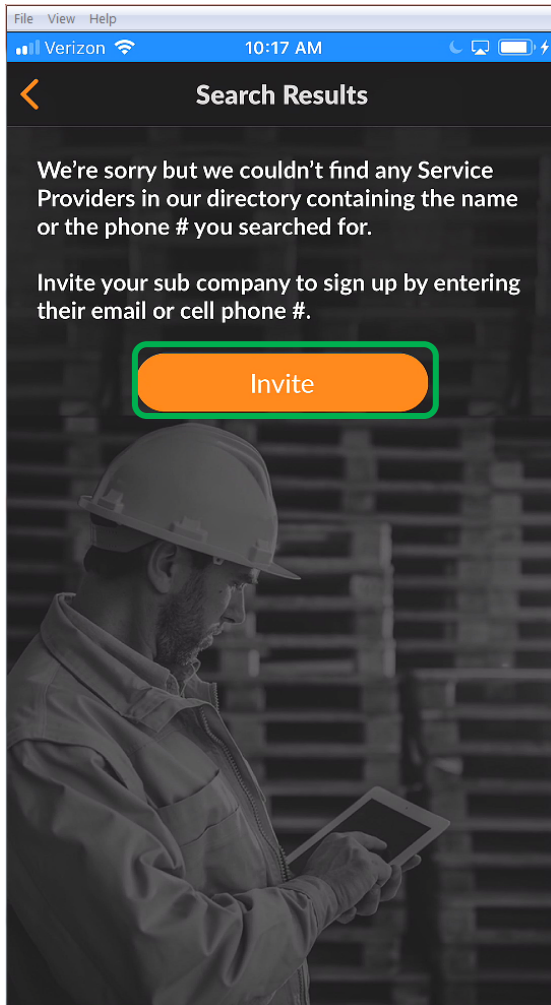
Enter your sub's company name, and phone number, then tap "Search"

The system will perform a search to see if the sub is already connected in the CorrigoPro Network

If the sub is already on the network, you'll be able to tap on the sub and automatically connect with them



# CorrigoPro Mobile App: Invite A Subcontractor (Sub)



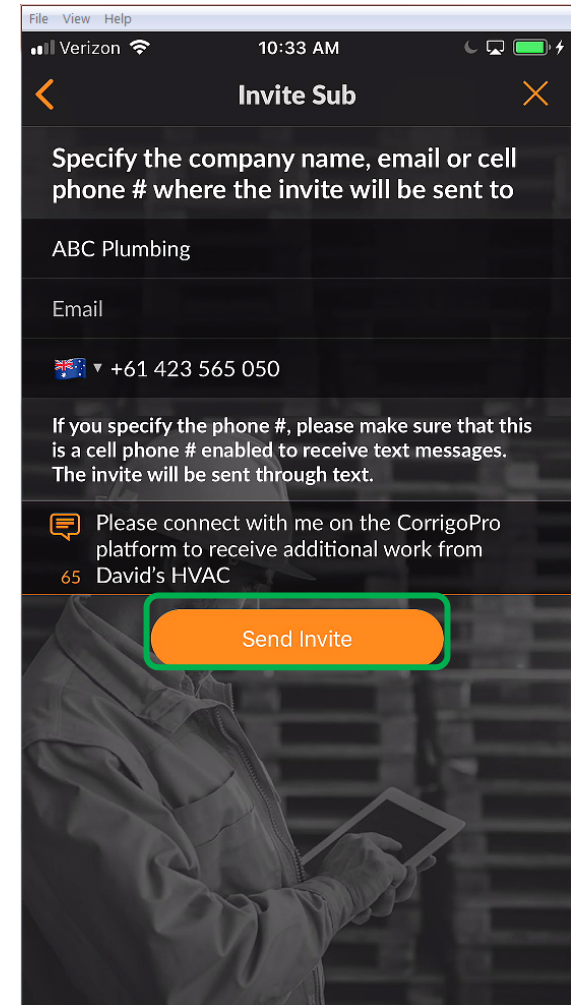
If the sub does not appear in the system, tap on "Invite"

Your sub's company name and company phone number will already be entered from the previous search

Enter a valid email address

Type an accompanying message to your sub

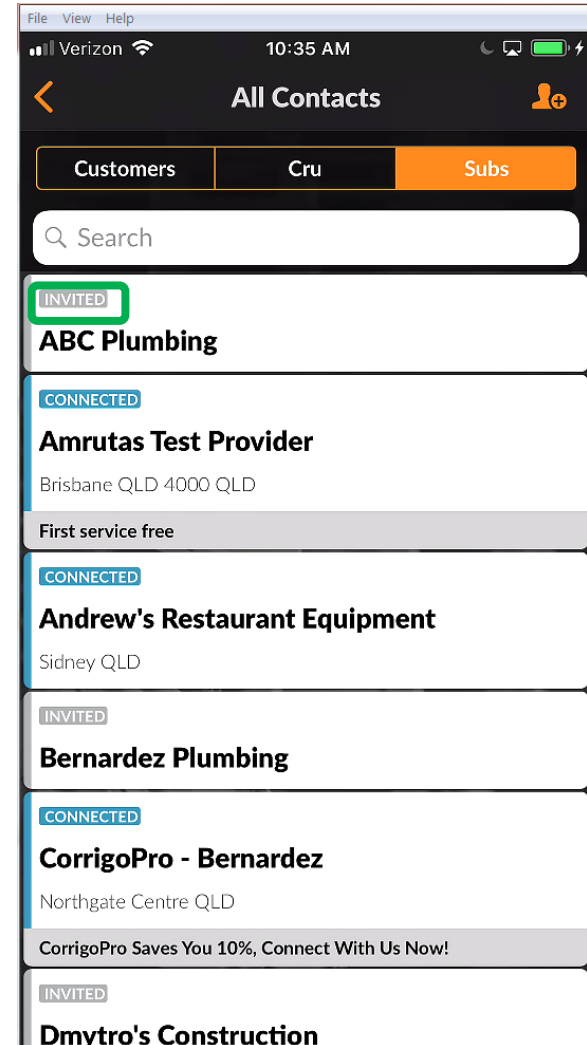
Tap "Send Invite"



# CorrigoPro Mobile App: Invite A Subcontractor (Sub)

The sub will now be listed in your SUBS contact list with an “INVITED” status

Once your sub accepts the invitation and downloads the CorrigoPro Mobile App, their status will change to “CONNECTED”

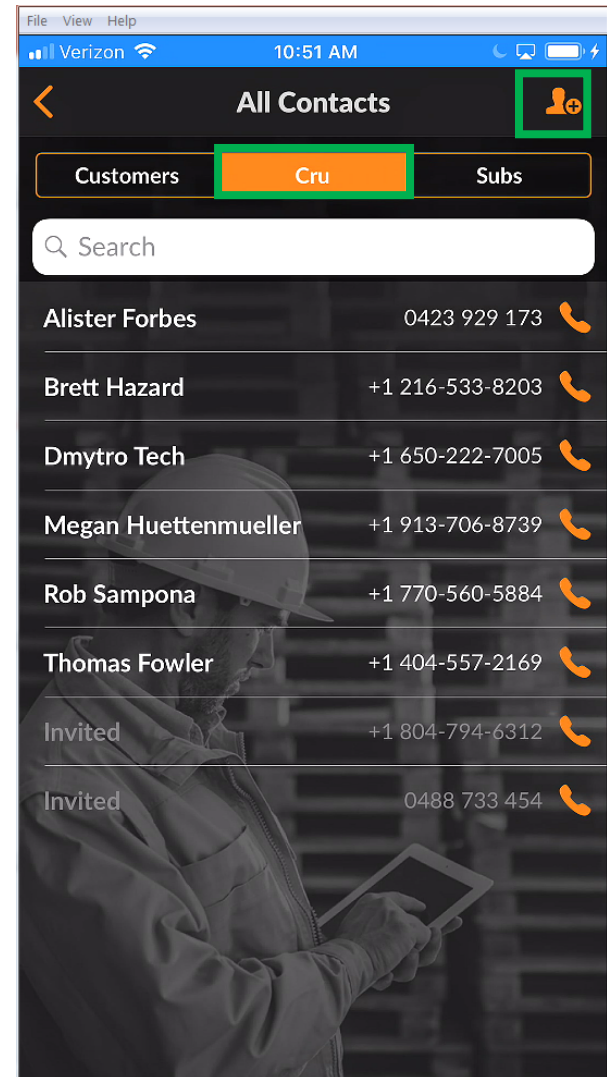




# CorrigoPro Mobile App: Invite CruMembers / CruLeads

To invite your CruMembers to connect, tap on the “CRU” tab in your contacts list

Then tap on the orange *plus* symbol



# CorrigoPro Mobile App: Invite CruMembers / CruLeads

Enter your CruMember's mobile phone number and optional invite message

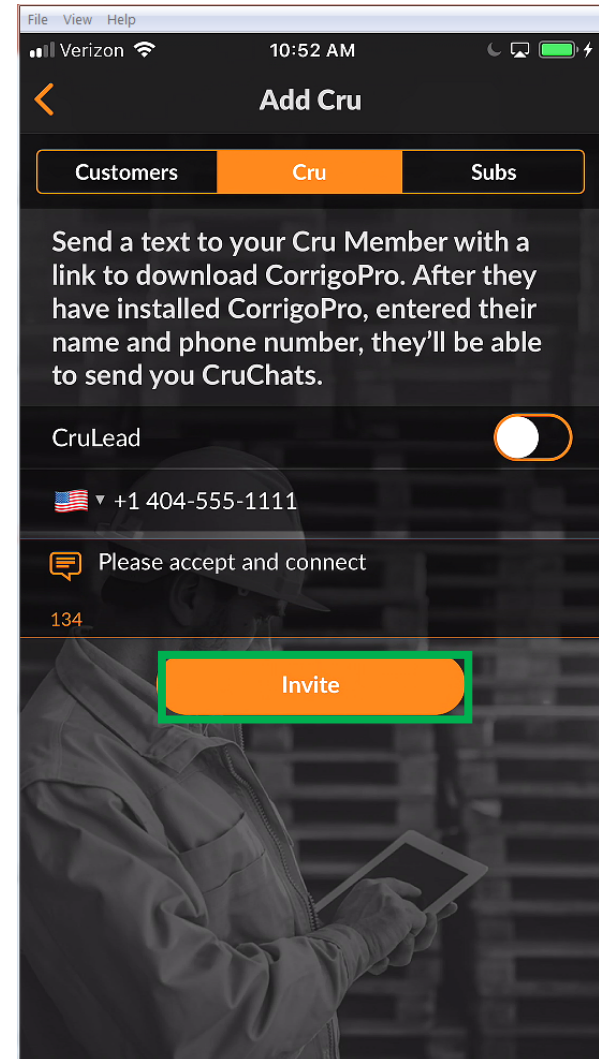
You may invite your new user as a CruMember or as a CruLead, toggle the switch to change the member status

A CruLead is typically someone in a leadership or dispatch role and can see all CruChats.

A CruMember must be added to a CruChat. Typically, CruLeads are technicians or field personnel that only need to be included in specific conversations

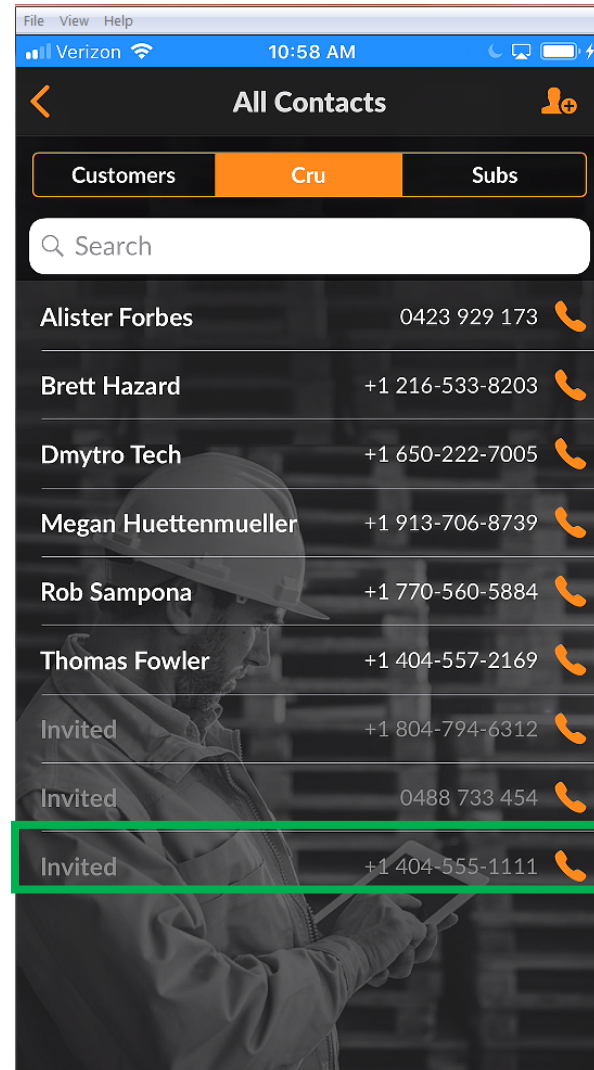
To designate the invitee as a CruLead, tap the checkbox in the CruLead section

Tap "Invite"

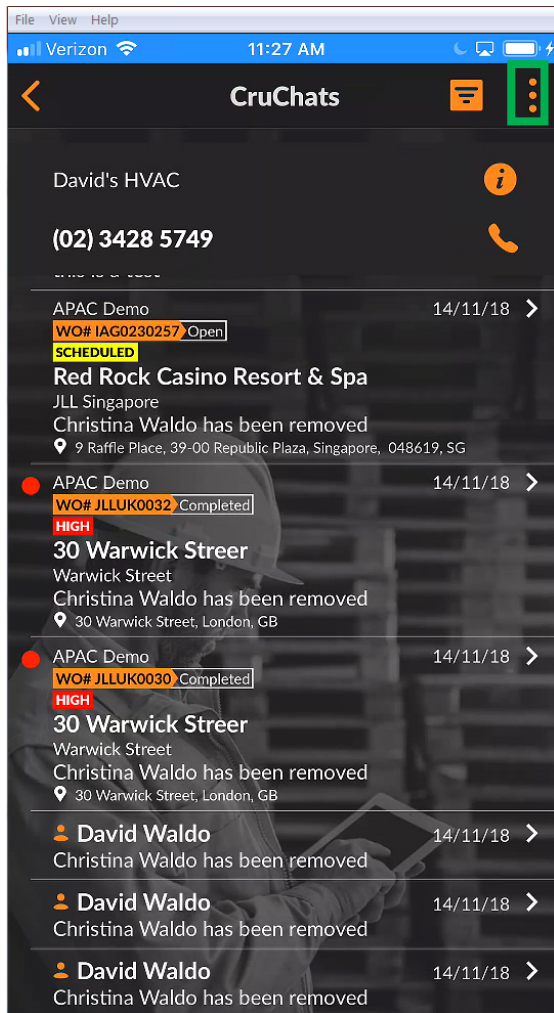


# CorrigoPro Mobile App: Invite CruMembers / CruLeads

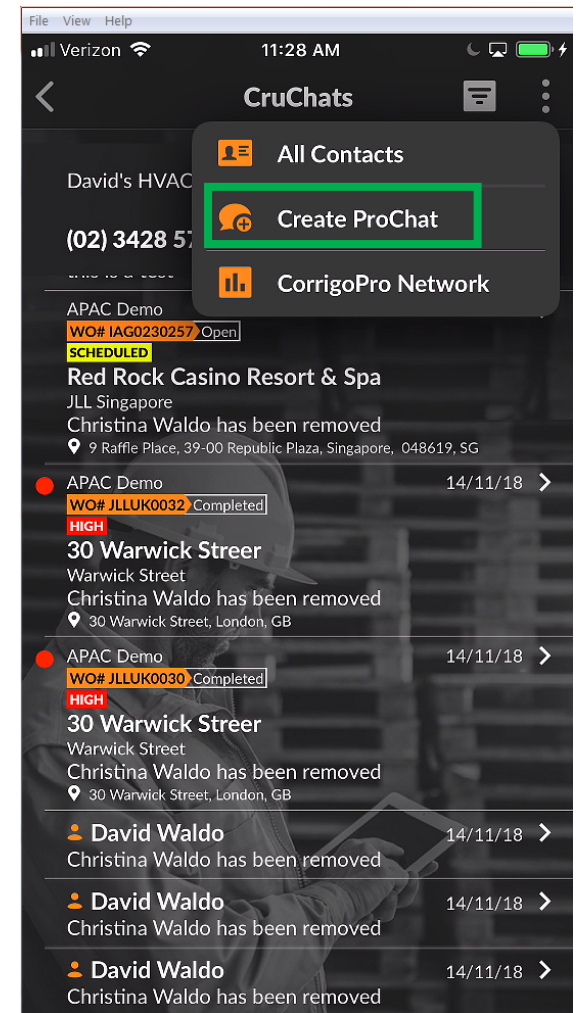
Once a new CruMember or CruLead accepts the invitation and downloads the CorrigoPro Mobile App they will be added to your CRU contacts list and available to participate in CruChats



# CorrigoPro Mobile App: Start a CruChat



To create a CruChat, tap on the three dots in the upper right hand corner of the screen, may appear different for Android devices  
Tap on "Create ProChat"

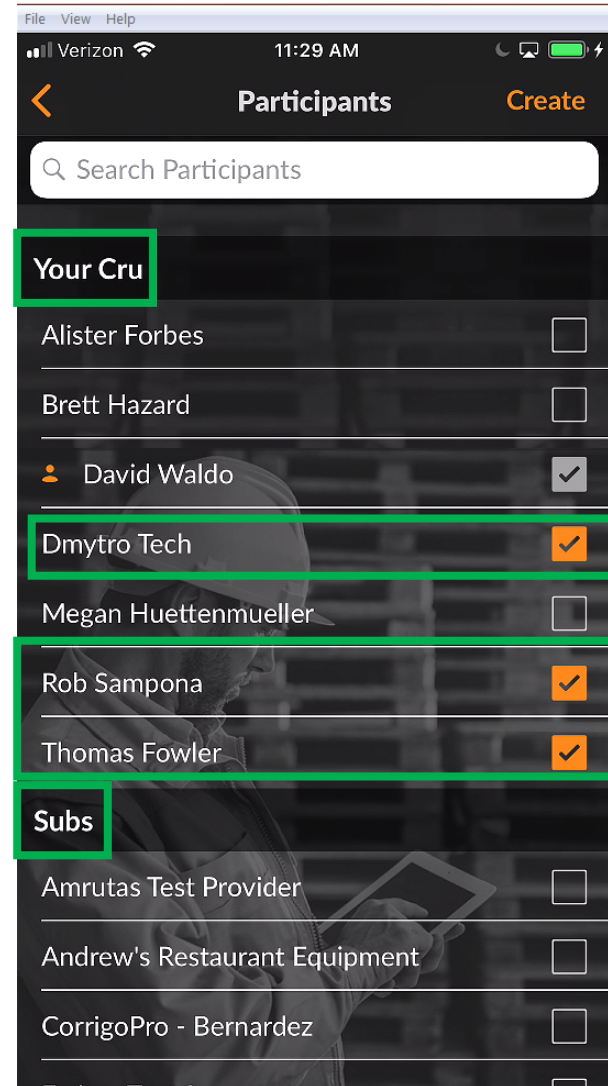


# CorrigoPro Mobile App: Start a CruChat

Next, the list of CruMembers and Subs you are connected with will be displayed

Select your desired CruChat participants by tapping the checkbox to the right of their name

Tap the orange “Create” in the upper right to initiate your CruChat (For android devices it is a checkmark )





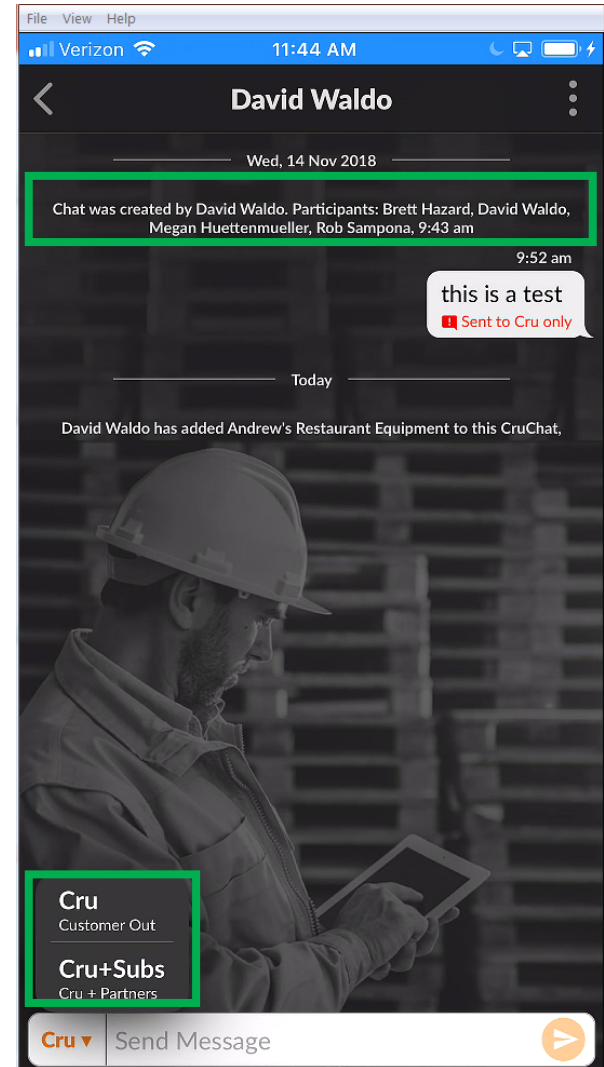
# CorrigoPro Mobile App: Start a CruChat

Now that your CruChat has been created, tap the menu to the left of the text message box to select your participant groups

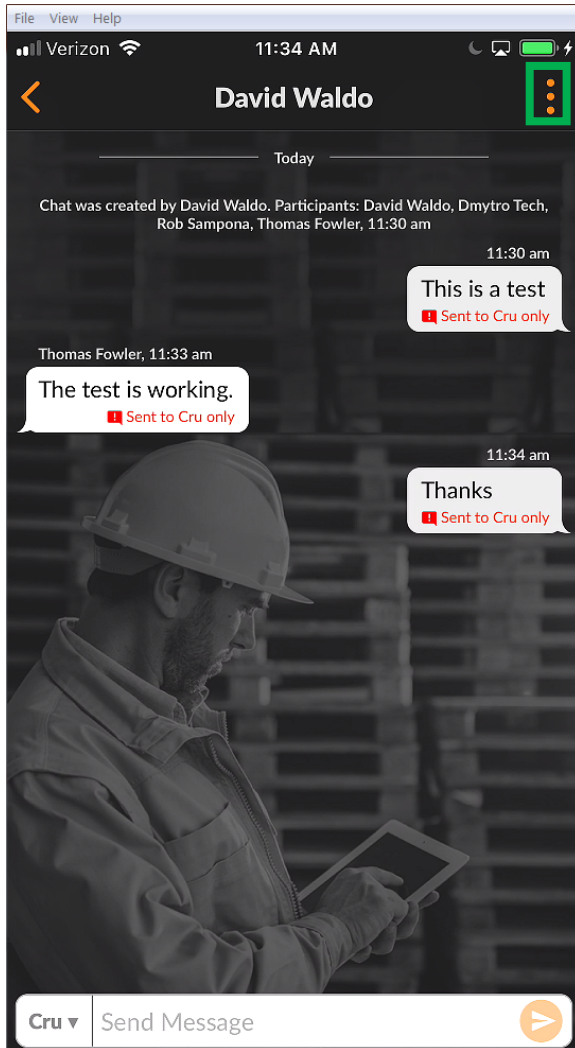
Select to communicate with just your Cru or Cru+Subs

Enter in your message and tap "Send"

Each text bubble will show who received the chat message



# CorrigoPro Mobile App: Add/Remove Participants



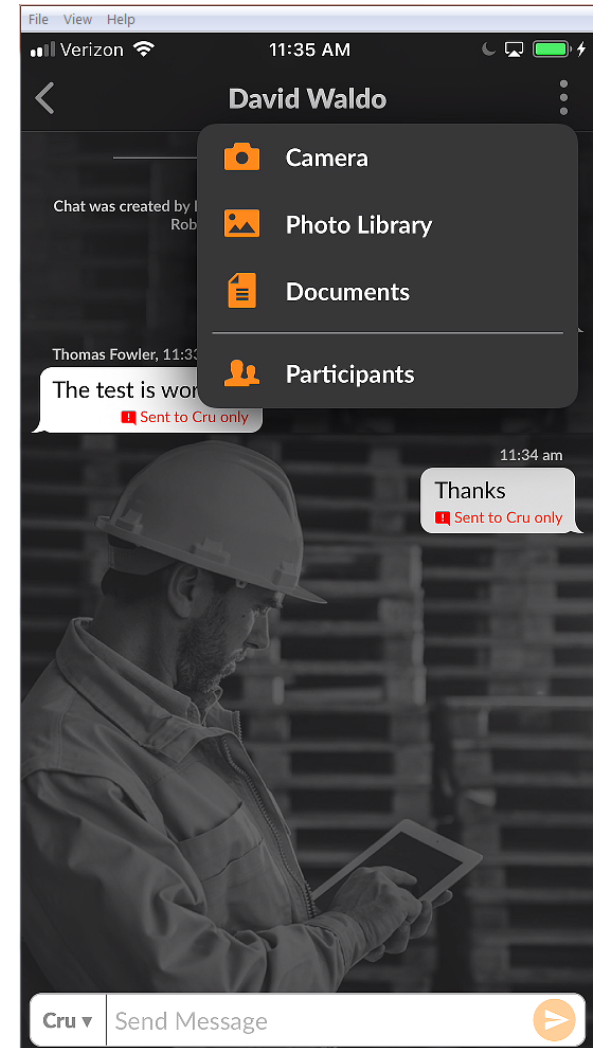
To add or remove participants of your CruChat, tap on the three dots in the upper right hand corner

Click on "Participants"

The CruMembers and Subs already included in the CruChat will have a checkmark in their corresponding checkbox to the right

Select or deselect participants, as needed, by tapping on the checkbox

Tap on the orange "Save" icon in the upper right



# Questions

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Contact Corrigo via phone or online:

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