

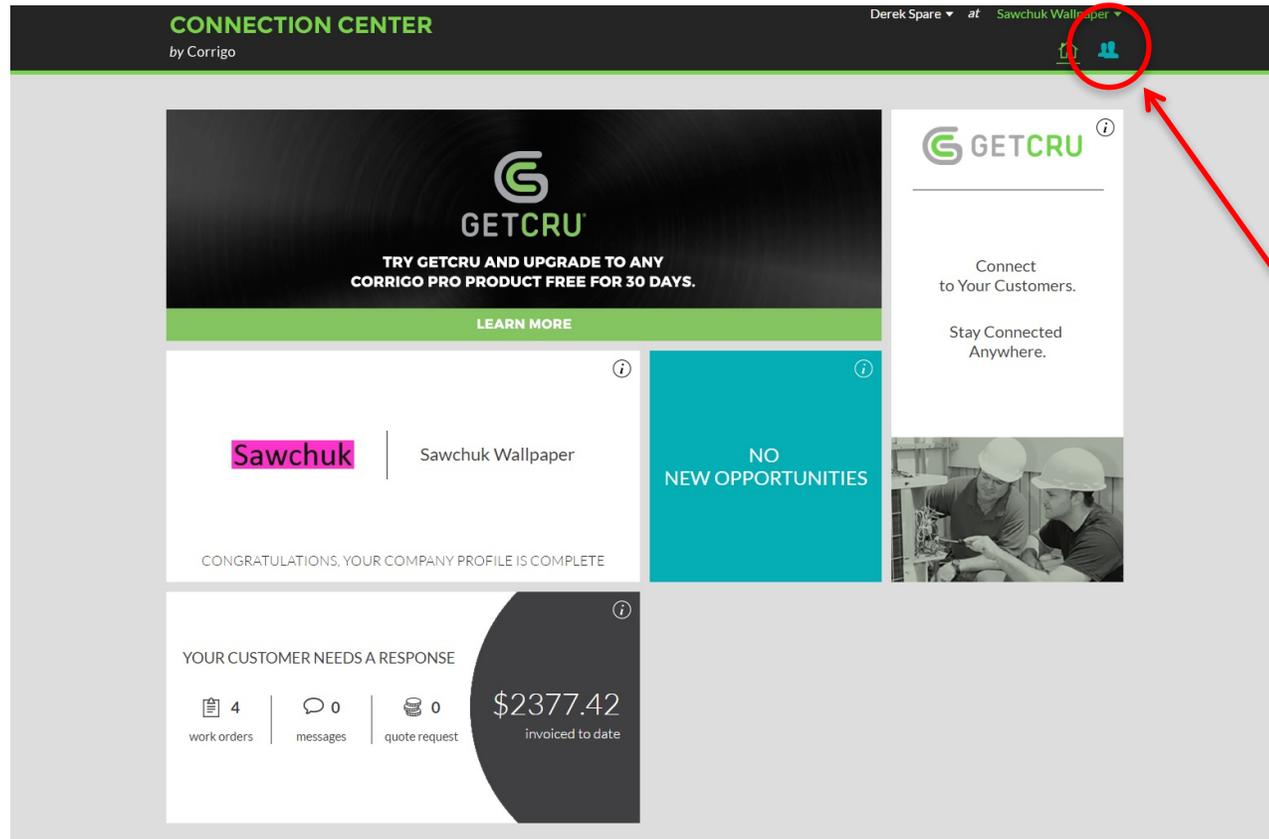


*We are what we repeatedly do. Excellence, therefore, is not an act but a habit.
- Aristotle.*

CORRIGO PRO

Guide to Adding New Users and Alerts

To add a user to your work order portal, first add them to your Connection Center page – click the “People” icon to get started.



Then select “Invite New User” on the User Management page.

The screenshot shows the 'User Management' page within the 'CONNECTION CENTER' interface. The page header includes the user name 'Derek Spare' and the role 'at Sawchuk Wallpaper'. The main content area features a 'User Management' section with a table of users. A red circle highlights the 'INVITE NEW USER' button located above the table. The table has columns for NAME, EMAIL, STATUS, and ACTION. One user is listed: Derek Spare with email dereks@corrigo.com and status Registered. An 'EDIT' button is visible next to the user's name. A 'BACK' button is located at the bottom right of the table area.

NAME	EMAIL	STATUS	ACTION
Derek Spare	dereks@corrigo.com	Registered	EDIT

Fill in the new invitee's name and email address, decide whether or not they need to be an administrator, and select "Invite".

The screenshot shows a web interface for 'CONNECTION CENTER by Corrigo'. The user is logged in as 'Derek Spare' at 'Sawchuk Wallpaper'. The main content area is titled 'Invite New User' and contains a form with the following fields:

- FULL NAME:** Bruce Dickinson
- EMAIL:** bruce@dickinson.com
- Role:** Administrator

At the bottom right of the form, there are two buttons: a grey 'BACK' button and a green 'INVITE' button.

Now your new invite is in “Invited” status. They will need to accept before you can continue. Once their status states “Registered,” you can add them to Pro Connect.

CONNECTION CENTER
by Corrigo

Derek Spare ▾ at Sawchuk Wallpaper ▾

Home User

User Management

INVITE NEW USER

NAME	EMAIL	STATUS	ACTION
Bruce Dickinson	bruce@dickinson.com	Invited	EDIT
Derek Spare	dereks@corrigo.com	Registered	EDIT

BACK

To add them to Pro Connect, select the work order widget, which states “Your customer needs a response.”

The screenshot displays the 'CONNECTION CENTER' dashboard for 'Sawchuk Wallpaper'. The interface includes a top navigation bar with the user's name 'Derek Spare' and the company name 'Sawchuk Wallpaper'. The main content area features several widgets:

- A large banner for 'GETCRU' with the text 'TRY GETCRU AND UPGRADE TO ANY CORRIGO PRO PRODUCT FREE FOR 30 DAYS.' and a 'LEARN MORE' button.
- A 'GETCRU' logo and a message: 'Connect to Your Customers. Stay Connected Anywhere.'
- A 'Sawchuk' logo and the text 'Sawchuk Wallpaper'.
- A teal widget stating 'NO NEW OPPORTUNITIES'.
- A 'CONGRATULATIONS, YOUR COMPANY PROFILE IS COMPLETE' message.
- A red-bordered widget titled 'YOUR CUSTOMER NEEDS A RESPONSE' containing:
 - 4 work orders (represented by a clipboard icon)
 - 0 messages (represented by a speech bubble icon)
 - 0 quote requests (represented by a document icon)
 - \$2377.42 invoiced to date (represented by a dollar sign icon)

Now select the yellow “People” tab at the top, and then “New Person” on the left.

The screenshot shows the WORKTRACK interface. At the top left is the WORKTRACK logo with 'Service Provider' below it. At the top right, it says 'Powered by corrigo' and 'Derek Spare | Learning Center | Logout'. Below the header is a search bar with 'Find: Person Name' and a 'Search' button. To the right of the search bar is a 'Recent Items' dropdown menu. Below the search bar is a navigation bar with three tabs: 'Service Requests', 'People', and 'Home'. The 'People' tab is highlighted in yellow and circled in red. Below the navigation bar is a yellow header bar with a 'New Person' button (circled in red) and an 'Edit' button. Below this is a table with columns for 'Name', 'Email', and 'Role'. The table contains two rows of data: Alex Sawchuk and Derek Spare, both with the role of 'Primary User'. At the bottom of the page, there is a copyright notice: 'Copyright © 2007-2010 Corrigo, Inc. All rights reserved. Terms of Use Privacy Statement'.

WORKTRACK
Service Provider

Powered by corrigo
Derek Spare | Learning Center | Logout

Find: Person Name [Search] Recent Items [v]

Service Requests **People** Home

» People ?

New Person Edit

Name	Email	Role
Alex Sawchuk	alexs@sawchuk.com	Primary User
Derek Spare	dereks@sawchuk.com	Primary User

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Click the drop down arrow in the “Connection Center Account” box and select the user that you just added to the Connection Center.

WORKTRACK
Service Provider

Powered by **corrigo**
Derek Spare | [Learning Center](#) | [Logout](#)

Find: Person Name Search Recent Items

[Service Requests](#) [People](#) [Home](#)

» [People](#) > Add New Person ?

Connection Center Account Required Field

Select the Connection Center user that you are creating this account for.

General Information Required Field

First Name:

Last Name:

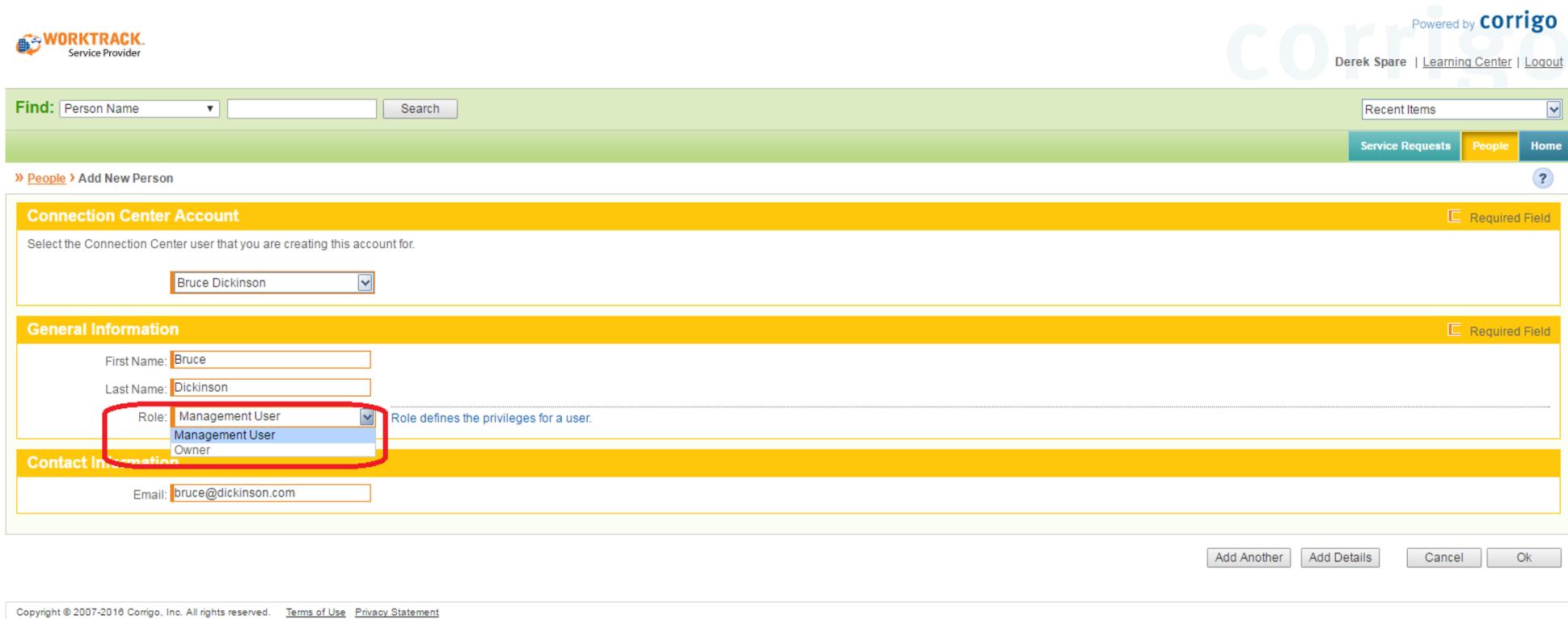
Role: Role defines the privileges for a user.

Contact Information

Email:

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The name and email will fill in automatically. You will need to select a role for the new user.



WORKTRACK
Service Provider

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Derek Spare | [Learning Center](#) | [Logout](#)

Find: Person Name Search Recent Items

[Service Requests](#) [People](#) [Home](#)

» [People](#) > Add New Person ?

Connection Center Account Required Field

Select the Connection Center user that you are creating this account for.

General Information Required Field

First Name:

Last Name:

Role: Role defines the privileges for a user.

Contact Information

Email:

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Congratulations! Your new user has been created.

To set up alerts for this user, please click on their name.

 New Person [Bruce Dickinson](#) has been created.

[New Person](#) [Edit](#)

<input type="checkbox"/>	 Name ▲	Email ⇅	Role ⇅
<input type="checkbox"/>	 Alex Sawchuk	alexs@sawchuk.com	Primary User
<input type="checkbox"/>	 Bruce Dickinson	bruce@dickinson.com	Management User
<input type="checkbox"/>	 Derek Spare	dereks@sawchuk.com	Primary User

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Now select “Edit” in the Alerts box to the right.

The screenshot shows the 'People Details' page for Bruce Dickinson. At the top left is the 'WORKTRACK Service Provider' logo. At the top right, it says 'Powered by corrigo' and 'Derek Spare | Learning Center | Logout'. Below the header is a search bar with 'Find: Person Name' and a 'Search' button. A 'Recent Items' dropdown is on the right. A navigation bar contains 'Service Requests', 'People', and 'Home'. The main content area shows 'Bruce Dickinson' with a 'Delete' button. Below this are two sections: 'Profile' and 'Alerts'. The 'Profile' section has an 'edit' link and lists: Name: Bruce Dickinson, Display As: Bruce Dickinson, Email: bruce@dickinson.com, Role: Management User. The 'Alerts' section has an 'edit' link circled in red and a checkbox for 'Receive alerts by email? Yes'. At the bottom, there is a footer with 'Copyright © 2007-2016 Corrigo, Inc. All rights reserved.' and links for 'Terms of Use' and 'Privacy Statement'.

If you would like for the new user to receive alerts for all new work orders and updates, ensure that the “Notify me immediately” button is selected. Then select OK.

The screenshot shows the 'Edit Alerts' configuration page for Bruce Dickinson. At the top, there is a search bar with 'Person Name' selected and a 'Search' button. Below the search bar, there are navigation tabs for 'Service Requests', 'People', and 'Home'. The main content area is titled 'Bruce Dickinson Status: Logged Out' and contains a form with the following options:

- Do you want to receive alerts by e-mail? Yes No
- Alerts I receive for Service Requests assigned to others**
- Flagged: On Off
- Overdue: On Off
- Missed Appointments: On Off
- Visit Overdue: On Off
- When a new WON Service Request is received: Notify me immediately Only for emergencies not accepted after minutes Off

The 'Notify me immediately' radio button is circled in red. A red arrow points to the 'Ok' button at the bottom right of the form. The footer contains the copyright notice: 'Copyright © 2007-2016 Corrigo, Inc. All rights reserved. Terms of Use Privacy Statement'.

Thank You!!

For Questions:

support@corrigo.com
