

CorrigoNet™/CorrigoConnect™

User's Guide



Customer Web Portal

Release 4.4

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# Table of Contents

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<b>Table of Contents .....</b>	<b>iii</b>
<b>Customer Web Portal .....</b>	<b>1</b>
About the Customer Web Portal.....	1
Logging in to the Customer Web Portal.....	2
Self Registering .....	3
Creating a Service Request from the Customer Web Portal.....	4
Viewing Requests.....	9
Canceling Requests .....	10
Changing requests.....	11
Additional Features .....	12
<b>Glossary .....</b>	<b>13</b>

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# Customer Web Portal

## About the Customer Web Portal

The Customer Web Portal lets customers log onto your company-branded web site to place and check the status of service requests. This site is completely separate from your Corrigo application instance and provides an interface that is tailored to the needs of your customers. It provides limited functionality but can ease the burden on your call center by allowing customers to place service requests unaided.

When you create a service request through the Customer Web Portal, your request is automatically relayed to a dispatch center where it is then assigned to a service technician who will resolve your problem.

To access the Customer Web Portal, you need a valid URL that points to your Company's customer web interface.

### To get to the Customer Web Portal:

1. Start your Internet Explorer web browser.
2. In the browser Address field, enter the URL for the Customer Web log-in page, then press Enter. You will arrive at the Customer Web log-in page.



The screenshot shows the Corrigo Customer Web Portal sign-in page. At the top left is the Corrigo logo. To the right is a banner image with the text "Improving your quality of living" and the date "1/16/2004". The main heading is "Sign In to Your Account". Below this is a box titled "Account Sign-in" containing the following text: "Please enter the lease holder's Sign-in identification and password, and then click Sign-in." There is a link "New user? Sign up now!". Below that are two input fields: "Sign-in ID:" and "Password:". A checkbox labeled "Remember Sign-in ID and Password" is to the left of a "Sign In" button. At the bottom, there is a link: "If you are having problems accessing this site or would like to request a Login and Password, please click [here](#)".

## Logging in to the Customer Web Portal

To log in to the Customer Web Portal, you need to have a valid Sign In ID and Password, unless your company has enabled self registration. Your system administrator is responsible for providing you with your ID and password.

### To log in to the Customer Web Portal:

1. Enter the URL to the company-branded Customer Web Portal log-in page in your browser's address field.
2. Enter your Sign In ID.
3. Enter your Password. The password is encrypted as appears as asterisks (\*\*\*) for security purposes.
4. Click the Sign In button.

### Tips:

- You have three chances to log in. If your sign-in ID or password are incorrect, after your third attempt you will see a page with a phone number to call for assistance.
- To enable auto-login, check the Remember Sign-In ID and Password check box when logging in. You should see a check mark in the box. This lets you log in to the Customer Web Portal without having to re-enter your sign-in ID or password each time.
- If you have trouble logging in, click the "**click here**" link at the bottom of the Account Sign-in page. This launches an email window where you can type a request for assistance and click Send.
- To log off, click the Log Off link on the Customer Web Portal main page.

## Self Registering

Companies have the option of allowing self registration for their customers. Self registration means that you can log in and register without first being assigned a sign-in ID and password by the system administrator. Check with your system administrator to find out if you can self register.

### To self register:

1. Enter the URL to the company-branded Customer Web Portal log-in page in your browser's address field.
2. Click on the 'Sign up now!' link and the New User Sign Up page opens containing the following text entry boxes. You must complete every field on this page.
  - **First Name** – Enter your first name.
  - **Last Name** – Enter your last name.
  - **Password** – Enter a password of your choosing. It appears encrypted as asterisks (\*\*\*\*) for security purposes.
  - **Confirm Password** – Enter the password again for verification. Be careful to enter it exactly as you did in the previous box.
  - **Email** – Enter your email address. This will be your sign-in ID until changed. Your email domain must be the same as your company's. For example, if your company's email addresses follow the convention "name@mycompany.com," your email address would be something like "myname@mycompany.com."
  - **Phone** – Enter your home or office phone number.
  - **Home Office State** – Select a state from the pull-down list. This determines the locations that will be available on the next page of this registration process.
3. Click Ok. The Select Default Location page opens.
4. Make a selection from the Default Location list. This list contains locations in the state specified on the previous page. Click Back if you need to go back and change the state.
5. Click Ok. The Additional Information page opens. Click Ok, and your registration is complete. You can now log in any time with your email address and password.

## Creating a Service Request from the Customer Web Portal

A service request is a solicitation for work such as repair, maintenance, or installation services.

### Tip:

- When creating service requests, always get as specific as possible in choosing assets and symptoms. Drill down to the most specific level of detail you can.

### To create a service request:

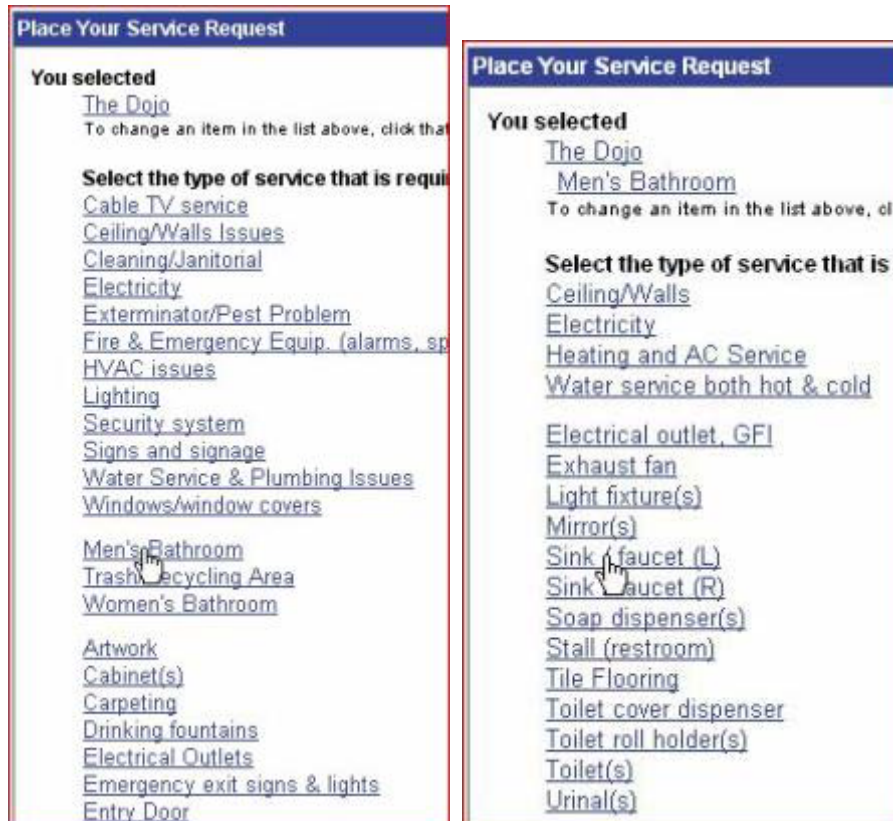
1. Log in to the Customer Web Portal.
2. Click Request Maintenance Service near the top of the page. A page opens with all valid locations and buildings where you can request service.
3. Click the link for the location where service is needed. You may have to click down several levels to get to the specific location you want, like your suite or apartment for instance. Once you enter the specific location, a page opens with a list of assets. (Click the Other link to specify a location in the building that is nowhere in the hierarchical lists.)

The screenshot shows a web page titled "Your Service Request" with a sub-header "Place Your Service Request". Under "You selected", the text "The Dojo" is displayed, followed by the instruction "To change an item in the list above, click that link." Below this is a section titled "Select the type of service that is required:" followed by a list of asset categories, each as a clickable link: Cable TV service, Ceiling/Walls Issues, Cleaning/Janitorial, Electricity, Exterminator/Pest Problem, Fire & Emergency Equip. (alarms, sprinklers, extinguishers, hoses), HVAC issues, Lighting, Security system, Signs and signage, Water Service & Plumbing Issues, Windows/window covers, Men's Bathroom, Trash/Recycling Area, Women's Bathroom, Artwork, Cabinet(s), Carpeting, Drinking fountains, Electrical Outlets, Emergency exit signs & lights, Entry Door, and Other. At the bottom of the list are two buttons: "Back" and "Cancel Request".

List of assets

4. Click the item from the list that needs attention. Again, you may have to drill down through more than one level. Once you have clicked on the specific asset, a page opens with a list of symptoms. (Click Other if the problem pertains to some asset not in the hierarchical lists.)

**Example of drilling down to specific asset and symptom**  
(your asset hierarchy will probably differ from this example)



Clicking on Men's Bathroom asset accesses assets within the bathroom, where you can click on the left faucet (the specific asset with a problem).

**Place Your Service Request**  
**You selected**  
[The Dojo](#)  
[Men's Bathroom](#)  
[Sink / faucet \(L\)](#)  
To change an item in the list above, click that link.  
**Select the type of problem**  
[Faucet doesn't work properly.](#)  
[Faucet has a leak.](#)  
[Garbage disposal is not working properly.](#)  
[Repair sink](#)  
[Replace sink](#)  
[Sink has dripping faucet.](#)  
[Sink is chipped or damaged](#)  
[Sink is chipped or damaged.](#)  
[Sink is clogged](#)  
[Sink is clogged.](#)  
[Sink is leaking underneath](#)  
[Sink is leaking underneath.](#)  
[Sink leak](#)  
[Sink leaks underneath.](#)  
[Unclog sink](#)

After clicking on faucet, the list of symptoms for that asset appears.

5. Click the most appropriate symptom. If the symptom is not in the list, click Other and enter a description of the problem on the page that opens.
6. Now you have the option of adding additional information to the request. Skip to the next step now if you do not wish to add additional information, or do one of the following:

**Place Your Service Request**

**You selected**  
[The Dojo](#)  
[Men's Bathroom](#)  
[Sink / faucet \(L\)](#)  
[Faucet has a leak.](#)  
 To change an item in the list above, click that link.

To change selections you've made so far click appropriate link here

Enter any additional information:

Type additional info here

If you believe this is an **emergency** [click here](#).

If you wish to add another item to your request, select one below

[The Dojo](#)  
[Men's Bathroom](#)  
[Sink / faucet \(L\)](#)

To add another item to request click appropriate link here

**How do you want to schedule this request?**

I want to grant the technician permission to enter.  
 Please call me first.

- Make this a [multi-line request](#) if there is more than one problem that needs attention. Multi-line requests contain more than one specified work item. This prevents you from having to create multiple service requests unnecessarily. This option is available only if it has been enabled at your site.
  - a. Click a link under "If you wish to add another item..." You are returned to the page where you can select additional assets that require attention.
  - b. Follow the steps above to select an item and its symptoms.
  - c. When you return to the page you left to begin this multi-line process, continue with the next step in this procedure.

**Tip:**

- Click [Show details](#) on the scheduling page if you wish to remove any of the line items you have added. Click [Remove](#) to delete the item, then click [Back](#) to continue with the work order.
- Mark this request as an [emergency](#). Emergency requests are assigned the highest priority, and alerts are sent out to on-call personnel. This option is available only if it has been enabled at your site.

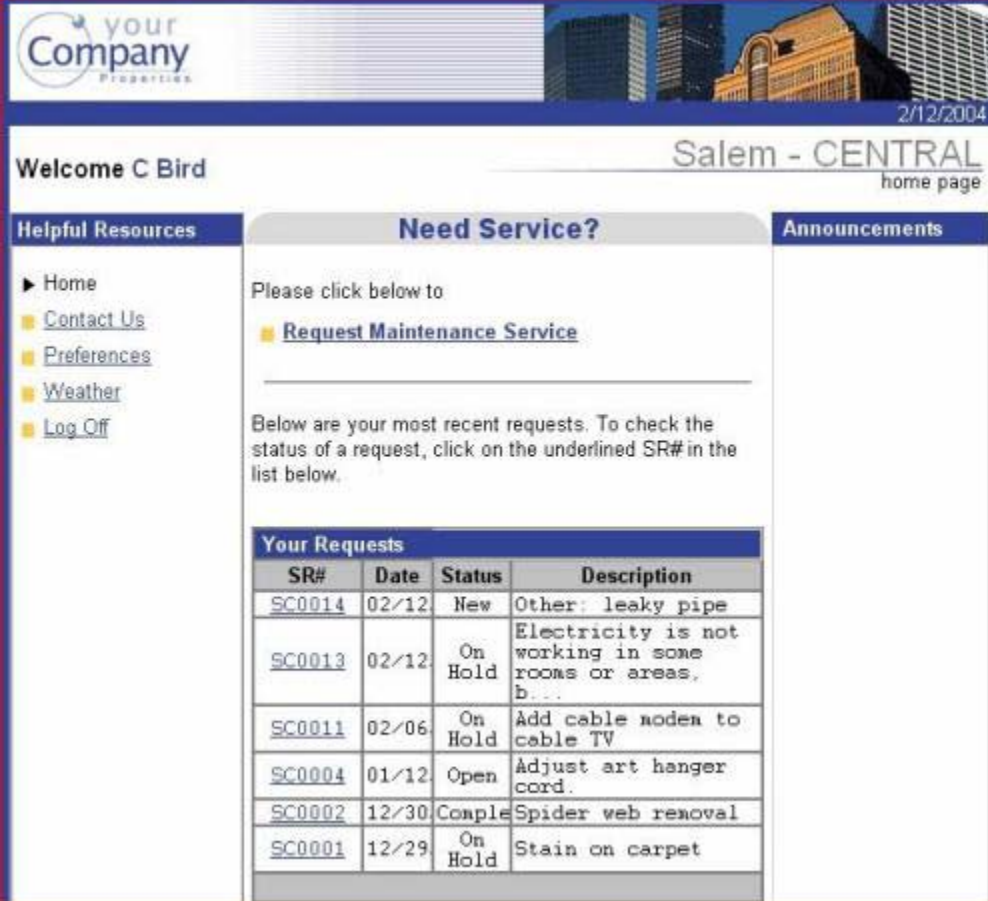
- a. Click the link in the sentence that reads, "If you believe this is an emergency click here." The Emergency Service page opens.
- b. Click one of the radio buttons in the list of pre-defined emergencies.
- c. Click Mark as Emergency. You are returned to the previous page.
- d. Continue with the next step in this procedure.

**Note: Emergency requests cannot be scheduled. They are automatically granted PTE status and are responded to immediately.**

7. Now select a scheduling option at the bottom of the page. Depending on your configuration, there can be as many as three options here: PTE, Appointment, and Call First. You can either grant permission to enter (PTE: this means you give the technician your permission to enter even if you are not there), require a call before the technician comes (Call First), or schedule an appointment. Select one of the buttons, and click Continue. If you choose to schedule an appointment, a calendar appears.
8. Select a date on the calendar, or click the arrow to go to the next month and select a date. When you have finished, click Continue.
9. Choose an appointment time or appointment block, and click Request Appointment. The Service Request Details page opens.
10. Click Submit Request. A Confirmation page opens with a confirmation number for tracking the request.
11. Click Back Home, and your request appears in the Your Requests list.

## Viewing Requests

You can view your service requests in the Your Requests list on the Customer Web Portal home page. Simply log in and view the page.



The screenshot shows the Customer Web Portal home page for Salem - CENTRAL. The page includes a navigation menu on the left, a central section for service requests, and an announcements section on the right. The central section is titled "Need Service?" and contains a "Request Maintenance Service" link. Below this is a table of "Your Requests" with columns for SR#, Date, Status, and Description.

SR#	Date	Status	Description
<a href="#">SC0014</a>	02/12	New	Other: leaky pipe
<a href="#">SC0013</a>	02/12	On Hold	Electricity is not working in some rooms or areas, b...
<a href="#">SC0011</a>	02/06	On Hold	Add cable noden to cable TV
<a href="#">SC0004</a>	01/12	Open	Adjust art hanger cord.
<a href="#">SC0002</a>	12/30	Comple	Spider web removal
<a href="#">SC0001</a>	12/29	On Hold	Stain on carpet

The list includes:

- Request number (SR#)
- Date (Date Submitted)
- Status
  - New: Request has been submitted, but not opened by a technician.
  - Open: A technician has accepted responsibility for that work order.
  - On Hold: The technician has paused work on the service request; typically waiting on parts, approval, assistance, etc.

- Completed: The work has been finished
- Description

**Tip:**

- To view request details, click the request's number in the list. The Service Request Status page opens.

### Service Request Status

<b>Service Request:</b> SC0014		
<b>Status:</b> New		
<b>Submitted:</b> 2/12/2004		
<b>Work Order #:</b> SC0014		<b>Status:</b> New
<b>Schedule:</b> Permission to Enter		
<b>Location:</b>	<b>Item:</b> Water Service & Plumbing Issues	Cancelled
<b>Task:</b> Other:		
<b>Additional Information:</b> leaky pipe		
You asked us to use the following contact information if we have questions:		
<b>Name:</b>	C Bird	
<b>Phone/Email:</b>	test@corrigo.com	
<input type="button" value="Home"/>		

**Canceling Requests**

You can cancel a request if you determine that service is not needed.

**To cancel a request:**

1. Click the request's number in the Your Requests list on the Customer Web Portal home page. The Service Request Status page opens.
2. Click the Cancel button. You will be prompted to confirm or Cancel.
3. Click Ok.

## Changing requests

You can change the scheduling options of your request to grant permission to enter and to set or change the appointment date and time if these scheduling options are enabled in your work zone preferences.

Depending on your configuration, there can be as many as three scheduling options: PTE, Appointment, and Call First. You can either grant permission to enter (PTE: this means you give the technician your permission to enter even if you are not there), require a call before the technician comes (Call First), or schedule an appointment.

### To change a request:

1. Click the request's number in the Your Requests list on the Customer Web Portal home page. The Service Request Status page opens.
2. Click Grant PTE to give the service person permission to enter without a customer present.

OR

Click Call First to require the service person to call you before coming.

OR

Click Set Appointment. Click Ok in the confirmation box. A calendar page opens.

3. Click a date on the calendar, or click the arrow next to the name of the month to switch to another month. When you have selected a date, click Continue. The Set Appointment page opens.
4. Select an appointment time or block, and click Request Appointment.

## Additional Features

The Customer Web Portal home page contains other features that you may find useful:

- [Contact Information](#)

Click Contact Us on the Helpful Resources area of the home page to access contact information. Use this information to give feedback or if you require to communicate something other than a request for service.

- [Links of interest](#)

Your site may be configured with a Weather link.

- a. Click the desired link.
- b. Enter your zip code in the box that opens.
- c. Click Go.

- [Preferences](#)

Use the Preferences link to update personal information including name, contact information, and password.

- a. Click the Preferences link. The preferences page opens.
- b. Click in any box to enter text there. Select any existing text that you want to delete, and press the Delete key on your keyboard.
- c. Enter the new information by typing it on your keyboard.
- d. Click Save when finished.

**Tip:**

- If you change your password, remember that it will appear encrypted for security purposes. Be sure you enter it exactly the same in both the New Password and Confirm New Password boxes.
- [Announcements](#)

Announcements appear in a column on the right side of the Customer Web Portal home page. Check here for important or informative messages.

## Glossary

**Action Log:** A work order feature showing the chronological history of actions on the work order.

**Alerts:** Automatic notification received by email or mobile device, such as an Internet-ready phone. Alerts notify personnel of work orders assigned to them.

**Assets:** The real property, commodities, or chattel against which work orders are created. Examples of assets are buildings, appliances and utilities in a suite, and equipment in a restaurant.

**Attributes:** Custom fields for models to be used in any way the user wants. Some examples of uses for attributes are for physical features of an asset, serial and model numbers, condition, and inspection date.

**Cancel:** A work order status rendering the request inactive. Work orders can be cancelled at any point in their life cycle.

**Company:** See Enterprise.

**Complete:** A work order status indicating that the request for service has been satisfied and the objective met. Only work orders in the following conditions can be completed: open, needs attention, on hold.

**Contract:** The feature within Corrigo application by which customers are associated with assets and the services performed on those assets on behalf of customers. Contract is a generic term that has various synonyms in the Corrigo application interfaces themed for specific industries. For example, contracts are called "leases" in some implementations.

**Customer:** The entity serviced by the enterprise. Customer is a generic term that has various synonyms in the Corrigo application interfaces themed for specific industries. For example, customers are called "tenants" or "residents" in some implementations.

**Enterprise:** Referred to as "Company" in Corrigo application. The enterprise is the highest-level entity in the hierarchy consisting of the assets and property work zones around which work orders are generated.

**In-Progress:** A work order status indicating that work has started. Work orders are in progress when a user indicates via WIT that work has begun.

**Item:** A specific asset for which a work order is created.

**Labor code:** A specification for a rate of compensation or remuneration for specific type of labor (e.g., straight time and overtime). Labor rates may differ from work zone to work zone.

**Lease:** A type of contract. Contract is the generic Corrigo application term; lease is specific to an industry.

**Materials:** Parts and accessories used to complete the work order objective.

**Models:** Definitions for all of the assets in the system on which work is to be done. Models have associated attributes and tasks defining them and the work to be done on them.

**Needs Attention:** A work order status indicating urgency. Any open work order can be flagged as needing attention, and new work orders can be flagged as such automatically if desired.

**On-Hold:** A work order status indicating that work has ceased temporarily. Any open work order can be placed on hold.

- Open:** A work order status indicating that work has begun. When work orders are picked up their status is set to open.
- Permissions:** Rights assigned to users governing access and use of the system. A user's permissions determine his or her role. Each role has a specific, defined subset of the system which it can see and use.
- Personnel:** Human resources, either employees or vendors, who perform the work to complete work orders. These are the technicians or service people who perform the actual labor or provide service. All personnel are "users" in Corrigo application.
- PM/RM:** Preventive maintenance and routine maintenance. PM/RM work orders are generated automatically as scheduled, not in response to service calls.
- Portfolio:** A collection of work zones.
- Priority:** A ranking of relative urgency assigned to each work order.
- Property:** A type of work zone. Work zone is the generic Corrigo application term; property is specific to an industry or implementation.
- Punch List:** A task list that can be attached to a work order to assist in ensuring satisfaction of the objective of the work order.
- Reports:** Statistical data generated by the system in various forms and levels of detail. Data related to work zones and work order generation and completion can be tracked for analysis.
- Role:** Personnel designation comprising a collection of permissions assigned to each user. Examples of roles are system administrator and technician.
- Service Request:** A solicitation for work to be performed originating from the Customer Portal or the Call Center. Service requests are distinct from other work orders only in their point of origin.
- Specialty:** A specialized service associated with a user.
- Task:** The action to be completed in satisfying the work order. This is the central issue for which service is being requested.
- Team:** A group of users associated with a work zone.
- Time Card:** A record entered by personnel to log the amount of time worked.
- Unit:** An asset to which a contract can be attached. Examples of units are suites, apartments, and stores.
- User:** A person registered in Corrigo application with access via user ID and password. Each user has an assigned role determined by the associated permissions granted by the system administrator.
- Wireless Internet Terminal (WIT):** A device used for creating, receiving and opening work orders and tracking their progress. WITs include Internet-ready phones, pocket PCs and some types of PDAs and are generically referred to as mobile devices in the documentation.
- Work Order Tool Box:** The lower section of the Work Order Details page for viewing additional details and attachments to the work order.
- Work Orders:** The basic unit around which work is organized, consisting of a request for a discreet amount of work usually assigned to a single personnel to be completed in a single session. Work orders are created using the Customer Portal, the Customer tab, or a WIT.

**Work Zone:** An area in which service is provided and work accomplished. Work zones are defined by the assets they contain and are the top-level organizing asset to which all other assets are attached. Work zone is a generic term that has various synonyms in the Corrigo application interfaces themed for specific industries. For example, work zones are called "properties" or "job sites" in some implementations.