# corrigo®

v.t., *Latin*, to set right; to correct



Release Notes Summer 2007 Update Release 5.3a

CorrigoNet™ CorrigoConnect™

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# **Release Notes**

#### CorrigoNet Summer 2007 Update (version 5.3a) Client Availability: September 2007

**Notice:** These release notes provide an overview of the enhancements, modifications and intended defect fixes in Release 5.3a (CorrigoNet Summer 2007 Update). Actual implementation may differ from descriptions in these notes. No guarantees are made or implied about the inclusion of specific features or functionality in the Summer 2007 Update. These notes contain summary descriptions and do not cover all changes to the system.

### Summary/Purpose

The Summer 2007 Update is intended for deployment to a relatively small subset of Corrigo clients who have specifically requested or require the functionality included in the release. As well, some new clients may be taken live on this version. The existing version of CorrigoNet (5.2 also known as "Winter '07") will remain live, and all clients remaining on 5.2 will be migrated to 5.3 after the Winter '08 release (5.3b).

# Highlights

#### **Corporate Web**

#### Work Order Communication Log

A Communication Log is now available from the Work Order Details page showing all alerts and send/prints created for a specific work order (see Figure 1). The log provides a communication "trail" for the work order helping to identify who and when someone was contacted.

Work Order # W	00080	Type: Request		<u>S</u> ave   Send/Print   <u>C</u> lose
Status: New	P	Pick Up     Start   Atte	nt <u>i</u> on  On- <u>H</u> ol	d  Complete   Cancel    <u>R</u> eOpen
<b>Customer Informatio</b>	n			Demo Service Area
Customer:				
Location: 1717 :	Service History Atta Action Log Punch Lis	t ToDo List Commu	nication Log	Fields Financial
Work Description	Send Time	Address	Source Log	Status/Notes
Sanica	03/22/2007 10:03 AM	facilitiest@dell.com	Alert	No persons and/or valid contact addresses were found to A
Service	03/22/2007 10:03 AM	Benjamin_Martin@dell.com	Alert	Sent
AVC Compressor	03/16/2007 8:00 AM	facilities@dell.com	Alert	No persons and/or valid contact addresses were found to
	03/15/2007 8:04 PM	facilities_dispatcher@dell.co	Alert	Sent
Assignment and Sch	03/15/2007 7:54 PM	facilities_dispatcher@dell.co	Alert	Sent
Assignment and Sch	03/15/2007 7:43 PM	facilities_dispatcher@dell.co	Alert	Sent
Priority: Regu	03/15/2007 7:33 PM	facilities_dispatcher@dell.co	Alert	Sent
Start Time:				
Duration: 1	hrs UU mins Inv	olce: UNo UYe	No	t to Exceed: \$U
			P.(	0. Number:
Service History A	Attachments Notes	Logs/Lists Art Fie	lds Financia	1
Action Log Punch	List ToDo List	Communication Log		
Send Time	Address	Source Log	Status/Notes	

Figure 1: Communication Log within the Work Order Details Page

#### Associate Punch Lists with Tasks and Auto-Populate in Work Orders

This feature automatically attaches punch lists to work orders based on a defined association between punch lists and tasks. This helps to ensure process compliance and that proper measures are taken to complete a task instead of relying on the dispatcher to associate the proper punch list to a work order after it has been created.

Administrators can associate punch lists with tasks through the Task Details page (click Edit Tasks on the Model Summary page, under Our Company>Knowledge Base) as shown in Figure 2. When a non-PM work order is created with that task, or the task is added to a work order, the punch list will automatically be attached.

Custom Tab	Home	Work Orders	Assets	User	Customer	Our Company	Reports	Materials	Financial
Task - De	tails						0	K    Can	el
*Descriptio *Type(s):	n:	Coils symptom preventative routine corrective							
Expected Ti Complete: *Skill:	ime to	2 Hou	urs : 0	Minute	5	¥			
*Priority:		Regular				*			
Punch List:						Sele	ct    Cle	ar	
To attach button.	n <b>Ch List</b> nch List	- Web Page : g Punch List, sele	<b>Dialo</b> s	<b>g</b> the list a	nd click the At	tach	X		
Available	e Punch L	.ists		Tasks					
Safety Ins	spection		~	Select a	n item at the	left.	~		
				Atta	ch Punch Lis	t   Cancel			
http://sf17.c	orrigo.con	n/CorpNet/asp/le	gacy/shar	ed/punch	list, 🥑 Intern	et			

Figure 2: Associating Punch List with Task

#### Note:

Punch lists will not be automatically attached to work orders created through mobile devices, import/export, work plans (children work orders), and the Turns Board.

#### Ability to Specify URL for Document Attachments

Users with the "Document – Basic" privilege can now specify URLs as source locations for document attachments. This is convenient for customers that already have a document management system in place and simply need to reference this system instead of physically uploading files to the CorrigoNet database. In the description field in the Attach Document dialog box, users can specify the correct URL (see Figure 3)

Custom Tab Home Work Orde	rs Assets User	Customer Our Company	Reports Materials	Financial
Task - Details			ок	Cancel
Work Orders Assets Customer				
Work Order # HB0061	Туре		<u>S</u> ave   Send/Print	t   <u>C</u> lose
Status: New	Pick <u>U</u> p     S	tart   Attention  On- <u>H</u> olo	Comp <u>l</u> ete   Ca <u>n</u> cel	<u>R</u> eOpen
Customer Information				Super Suburbia
Customer: 💌 The Smith's	Document De	tail Web Page Di	alog	×
Location: Z027 Halford Ave	Document Detai	1		
Work Description				
Service				
A Exhaust Fan - HVAC	*Document Type:	Warranty	~	
Assignment and Scheduling	*Title:	Home Warranty Agreement		
Priority: Regular	Document:	(None Selected)	Select Shared Do	c    Upload
Start Time: 7/28/2007 06:30 PM	Description:	http://files.corri		
Duration: 1 hrs 00 mins		go.com/Warrant y/2008/HomeWa rranty.pdf	escription may be up to 4 ne. If description is a valio as a document source.	1 lines long, 16 character 1 hyperlink the hyperlink
Service History Attachments				
Work Order Documents	*Start Date: 8/21/	2007 🗉 Unlimited	: 💿 End Date: 🔾 🔤	4
Title D				
Add New    Delete				
				OK     Cancel

Figure 3: Attachments Tab showing a URL as document source

No uploaded (or "shared") document is associated with the document record. Once created, selecting the document hyperlink will reference the URL to retrieve the document.

Note: Currently the URL is limited to 64 characters.

#### Modifications to the Turns Board and List Pages

#### **Dispatch Board Changes**

The following changes have been made to the Dispatch Board:

- The board will now save the scope that was selected when it was closed, meaning that dispatchers will no longer have to select the scope every time the Dispatch Board is launched.
- Turn –type work orders will now display on the Dispatch Board. This allows dispatchers to monitor turn type work orders directly from the Dispatch Board, where other types of work orders are also monitored. A "Display Turn Type Work Orders" setting is available to configure this capability.

• The work order codes used with the Voice Portal may now be displayed on the Dispatch Board. In addition, the work order codes will be visible when placing the mouse over the work order number on the Work Order Details page. This field can be configured in the Dispatch Board Configuration page to be shown or hidden within the Dispatch Board.

#### Vendor Invoice Page Changes

In order to locate relevant invoices more conveniently, a team scope option and contact name search parameters are available, as shown in Figure 4.

LEG Home Work Orders* Assets Employee	* *Customer* Our Company Reports Materials Financial	
Vendor Invoices	Team* .ZS Vendor Team	•
Show All Invoices		
Show available Invoices where (None Selected)	Search	
(None Selected) WO#* Number Double-click a row to see the de Vendor Invoice Numbe Vendor Last Name	er	
Invoices Employee* ID	it   📕 Invoice Status Filter: Off 🛛   Save	
W0#* \er[Contact Name	ubmit Auth. # Amount Check # AP Status	
ZSQA0004 zs_vendor2 \$870.0	00 05/30/2006 \$0.00 🔻 Vendo	
ZSQA0006.01 zs_vendor2 \$75.0	00 \$0.00 <b>v</b> Waiting	
ZSQA0021 zs_vendor2 \$0.0	00 \$0.00 🔻 Waiting	
Update all selected Work Orders* to status:	Authorized VI Update	

Figure 4: Vendor Invoice Page showing Team scope and Contact Name search parameter

#### Survey List Changes

In order to locate surveys in a timelier manner, a team scope selection option is provided as shown in Figure 5. Previously, surveys were displayed per work zone or community only.

LEG	Home	Work Orders*	Assets Employ	yee* *Customer*	Our Company R	eports Mater	rials Financial			
Mar	nual Sur	veys			Team* .CC	T20		-		
Time	Frame:	Current Year	~							
Se	Service Requests*									
W	0#*	Completed	Contact	Number	Description	1	Location			
AE	3CD1005	01/16/07	ARARA		Multi-item: H	andyman	Shopping mall\Lot	~		
<u>Z5</u>	<u>5000122</u>	07/19/07	Bob Platt	(650) 444-77	77 :Water treatr	ment:Make-uj	Location 3.2			
AE	3CD009223	01/24/07	BBB BBB	(222) 123-12	34 Bedroom:Ce	iling:Ceiling ł	Building A\Building			
AE	3CD009225	07/14/07	Lyte Paulson	alexb@corrig	o.com Multi-item: H	andyman	Shopping mall\Suit			
MF	R0019	08/09/07	Cartman	1231231234	Multi-item: H	VAC	Our House			
KS	0001	08/02/07	Bob B	1231231234	:AC service t	to the room o	Suite 210	$\sim$		
	A	Ask By Phone		Send By Email		Sk	ip (			

Figure 5: Perform Survey Page showing Team scope option

#### Map Board Changes

Previously, the Map Board had to be closed and re-opened to view the updated list of work orders. A refresh button is now available, which will refresh the board with the most current work order list.

Μ	Map Board									
Em	nployee* Work	Orders* *C	ustomer* Locations Landmarks Breadcrumb Map Current Location	on Map						
w	ork Orders	* (5) 🗈 īn	ne Window Today 🔻 🛛 Status Filter: Off 💙 Work Zone .CCT20		•					
Dra	Drag a column header here to group by that column									
	Status	WO#*	Description*	Assigned To	*Custo					
	Needs Attention	ABCD009628	:Dining Room:Clean up dining room.:	jeff, hiller						
	Needs Attention	ABCD009629	:Dining Room:Clean up dining room.:do it!	jeff, hiller						
	Needs Attention	ABCD009630	Kitchen Area:Dishwasher:Dishwasher does not fill with water.:	NONE	david r					
	New	ABCD009631	Multi-item: Cabinets	NONE	AAA22					
	New	ABCD009632	Coat Closet:Carpeting:Acrylic paint spilled on carpet.:	Acheson, Pat	david r					

#### Figure 6: Map Board with Refresh Button and Status Filter

In addition, the capability to filter the list by status is now available.

#### Turns Board Changes

Previously, the Turns Board displayed turns in the order where the farthest in the future were displayed first. It is more logical for users to be able to view turns that are most likely happening in the near future first as they must be addressed first. Thus, turns for vacant units will be displayed first sorted by the make-ready time (earliest to latest). Turns for units that are on notice will be displayed next, followed by units that are occupied.

	Turns* Board	🗾 📕 Fil	<b>F</b> ilter					<u>Unit* Status Board</u>				
	Unit*	Move Out*	Make Ready	Move In	Final	Inspe	Paint	Plumb	Maint	5 min	More	
	Building A/WEEWEW	10/29	01/05			30	<u>H</u>	<u>H</u>	<u>H</u>		Yes	^
Vacant Units	Jay's Home	01/31	02/10		Sc	<u> √ 02/02</u>	▼ <u>02/06</u>	▼ 02/07	▼ <u>02/03</u>		Yes	
	Building A/Suite 500	01/31	02/10			▼ <u>02/02</u>	▼ <u>02/06</u>	▼ <u>02/07</u>	<u> √ 02/03</u>		No	
	Maiki's Home One	01/31	02/10		30	<u> √ 02/02</u>	▼ <u>02/06</u>	▼ 02/07	▼ 02/03		No	
	J's Place	01/31	02/10		▼ Open	<u> √ 02/02</u>	▼ <u>02/06</u>	▼ 02/07	▼ <u>02/03</u>		No	
	Building A/ARA2	11/19	02/10		<u> </u>	<u> √ 02/02</u>	▼ <u>02/06</u>	▼ 02/07	▼ <u>02/03</u>		No	
On-Notice —	Building A/test	01/31	02/10		<u>!!!</u>	<u> √ 02/02</u>	▼ <u>02/06</u>	▼ 02/07	▼ <u>02/03</u>		No	
Units	Building A/Lot 433	02/08	03/23		✓ Open		<u>!!!</u>	<u></u>	<u>!!!</u>		No	~
	Print Turns* Bo	ard	Print Tu	rn* Activ	ites							

Figure 7: Turns Board Sorted by Status and Make Ready Date

#### Scope-less User Management Page

A *super-administrator*-only feature, the scope-less Manage User page, called Manage All Users (or Employees), allows administrators to rapidly find any user n the system regardless of the user's scope. Previously, an administrator had to find the user according to Work Zone or Team. Here, all users are displayed, making it easy for super-administrators to locate and manage users. Access to this page is granted through a new "User – Manage All" privilege.

JTOPIAN PROPERTIE	Ĩ Ŵ			5	<b>Velco</b> Systen	<b>me,</b> Administra n Administrator	torlong, Syste	m	<u>Help</u> Loqout
inger Cat Home	Work Orders* Asse	ets	Employee*	*Customer*	0	ur Company	Reports	Materials	Financi
mployees*			Team* Summ	iary					
			On-Call						
how All Employees*			Escalation						
earch for Employees*	where (None Selected	H) 🗸	TimeCard			Search			
Employees* - 828	8 records found		My Password					Add N	lew
Display As	UserID	Ту	Manage Empl	oyees*		Role		Activ	e
Bill Tech	4545454	En	Manage All Er	nplovees*		Advance	d Employee	N/A	~
Cal Tech	1234	En	Leesed To Em			Advance	d Employee	N/A	
Sue Tech	1234-445	En	Logged in Em	ployees.		Baldis Re	ole Test	N/A	
Tom Tech	qweerqw12	En	Reassign Emp	loyees*		Advance	d Employee	N/A	
aaa bbb,	aabbb111	En	Manage Team	IS*		Advance	d Employee	N/A	
aaa112222aa	aaaaaa1111	En	n al a dan ini al			Advance	d Employee	N/A	
aaaqqqq,	123qwe	En	Role Administ	ration •		Advance	d field special	list N/A	
Abad Parra	AbadP	En	Organizations			Maintena	ance Technica	n N/A	
Abby Redman	abbyr	Emp	ol.	2		Store Ma	anager	N/A	
Acheson, Pat	Patrick	Emp	AL AL	. Team		Maintena	ance Lead - II	I N/A	
Adam, Byron	adam2	Emr	d IN	TALL		Advance	d Employee	N/A	~

Figure 8: Scope-less Manage User Page

#### New Privilege Allowing Users to Add Customers

A new "Permissions – Customer Addition" privilege has been added that specifically grants users the ability to create customers. Previously, all users with the "Customer – Search" privilege were able to create customers, which will not be allowed in this release. This additional flexibility will allow some clients to restrict users with customer search privileges, such as dispatchers, from also creating new customers.

#### Mass Manage Work Order Changes

#### Ability to Make Mass Attachments

Users will have the ability to attach documents to multiple work orders. This allows terms and conditions, manufacturer warranty, asset diagrams, and other documents that may be relevant for multiple work orders to be easily associated to work orders through a single action, rather than having to attach the document to each work order. To do this, select "Attach Document" from the drop-down menu on the Mass Manage Work Orders page, then click Execute.

#### Ability to Send to Assignees

Users now have the ability to mass email or fax print outs to the primary assignees of multiple work orders. This provides a convenient method of sending out multiple work orders to an assignee or assignees at once. Execute the "Send to Assignee" action on the Mass Manage Work Orders page, as shown in Figure 9.

Custom Mass	Tab Home W Manage Work	ork Orders Assets User Orders	Customer O	ur Company Rep tfolio Region All S	orts Materials ervice Areas	Financial	•
Searc	Send Optio Send Options	ns Web Pag	ge Di 🔀	*	Sea	arch	
W	Settings:	O Fax 💿 Email		ork Order Filter: On rk Description	Assigned To	Type Filter: 0 Priority	ff
. ▼ ▼ ▼ ▼ ▼ ▼ ▼	*Email From: Email Subject: Comments:	alexb@corrigo.test.com CorrigoNet Work Order*		Compressor:Safe Filter:Replaceme Compressor:Dir Compressor:Da Compressor:Sa laust Fan - HVAC Handler:Monthly	Joe Technician Joe Technician Joe Technician	Regular Regular Regular Regular Regular Regular	
				Compressor:Da	Alex Smith Alex Smith Assignees	Regular Regular   Execute	•
		ОК	Cancel				

Figure 9: Send To Assignees action

#### Ability to Re-open Mass Work Orders

Users can also "Re-open" multiple work orders at once for those that are:

- Cancelled
- Completed
- On-Hold
- Needs Attention



Figure 10: Re-opening Multiple Work Orders

All work orders re-opened would contain the same reason, as described in the Re-Open dialog box, and will be set status of "New."

#### Ability to Filter by Type

A type filter will also be available on the Mass Manage Work Orders page (see Figure 9) to make it easier to quickly view the types of work orders that users wish to manage.

#### Ability to Mass Update On-Call Schedules

To make management of the On-Call schedule more efficient, this feature allows a user to change all Regular or all After-hours escalations. As shown in Figure 11, the user can select: "Update All Regular" or "Update All After Hours" from the On-Call Page, launching a dialog where the user can then select a single user and have the system populate all 7 days of either the regular or afterhour assignments.



Figure 11: Mass Update on the On-Call Schedule page

#### Ability to Mass Delete PMRM Schedules

PMRM schedules can now be deleted in mass through two mechanisms:

- PM/RM List Page. Schedules can be multi-selected and then deleted as shown in Figure 12, below.
- Import/Export PM/RMs can be exported to a spreadsheet, deleted within the spreadsheet, and then re-imported back into the system, which will permanently delete these records from the system.

Custom Tab Home Work	Orders Assets U	ser Customer Our Com	npany Reports I	Materials Financial					
Preventive or Routine Maintenance List   Portfolio Region All Service Areas									
Show All PM/RM Schedules Search for schedules with (None Selected) starting with Search									
Preventive or Routine	e Maintenance Lis	t	1	Create New PM/RM	1				
Schedule Name	Location	Item	Next	Previous					
<ul> <li>Weekly Safety Inspect</li> </ul>	io 906 SW Taylor Stre	et A/C Compressor	08/31/0	08/24/07	~				
Quarterly Safety Inspe	<u>ci</u> 700 SW 5th	A/C Compressor	11/26/0	6 11/09/06	~				
Delete				Mass Update	I.				

#### Figure 12: PM/RM Schedule Page

This allows for easier maintenance of PM/RM schedules as, previously, each schedule had to be deleted one by one.

#### Support for Tax Exempt Customers

Customers can now be specified as tax exempt, which in conjunction with the Bill To category, determines whether or not taxes should be included in the customer invoice. This provides a more robust billing solution that can prevent tax-exempt customers from being mistakenly charged taxes. The Bill To category selected within each invoice specifies whether a tax exemption is applicable.

To enable and apply tax-exempt status for a customer:

- 1. Define or edit the appropriate Bill To category (Financial>Settings>Bill To Categories) by setting Apply Tax Exemption Setting to Yes.
- 2. In the Customer Details page, select the Yes radio button for Tax Exempt.:
- 3. When the Bill To category is chosen for the customer invoice, the system checks whether tax exemption is supported for that category, then checks the tax exempt setting in the Customer Details page. If yes, the tax fields are excluded from the invoice.

After this process is completed, the system will continue calculating the invoice using the contract details, tax region associated to the service area, and the service costs.

Customer Detail	S Active WOs: 1	Service Requ	uest    Save    Print    Bac	<b>k</b>
* Name: GAR * DBA: 1046	CIA,ENRIQUE G. 6 QUEENS LANE	Billing Address Address 1:	12857 Homeridge Lane	
Customer #: 195	330-10	Address 2:	Lot - 10	
Tax Exempt:	Unspecified No <ul> <li>Yes</li> </ul>	<u>State/Prov.</u> Zip/Postal Code:	CA 91709	
	Bill To Categories			Back
Special Instruction	Double-click a row to edit Bill To Categor	y. Bill To Catego	ory Webpage Dialog 🔀	L Add Novi
Contacts	Bill TO Category	Edit Bill To	Category	Add New
Name ENRIQUE G. GARCI	CAM	*Label: Tena	nt	
Delete Contact	Construction Non-CAM Services Tenant   Delete     Edit	Customer Bill Must Enter TJ	back: O Yes No	
		Export Code:		
		Apply Tax Ex Setting:	emption 💿 Yes 🔘 No	Back
			OK    Cancel	
		http://v53a.qa.corrig	io.con 😜 Internet	

**Figure 13: Tax Exempt Settings** 

#### Actual Date/Time Recorded When Performing Backdate Action

Currently, the application allows work orders to be backdated, which is essential for some customers who may complete work orders before the work order record itself has been created. Recording when this action took place is necessary for tracking and auditing purposes.

When backdating actions like Create, Pickup, Start, Stop and Complete, a comment will now be added to indicate when the action was really performed, as shown in the figure below:

Service History	Attachments	Notes	Logs/Lists	Add'l Fields	Financial		
Action Log Pun	ch List* ToE	Do List C	ommunicatio	n Log			
Action Time	Perfor	ned By	Action		Comm	ents	
08/20/2007 08:19	PM Adminis	tratorlong, S	Assignment	Changed			~
08/15/2007 08:25	PM Adminis	tratorlong, S	Backdate: (	Completed	Backda	ate on 8/20/2007 08:	25 PM
08/14/2007 08:23	PM Adminis	tratorlong, S	Backdate: 9	Stopped	Backda	ate on 8/20/2007 08:	23 PM
08/12/2007 08:22	PM Adminis	tratorlong, S	Backdate: 9	Started	Backda	ate on 8/20/2007 08:	22 PM
08/11/2007 08:19	PM Adminis	tratorlong, S	Backdate: F	Picked Up	Backda	ate on 8/20/2007 08:	19 PM
08/10/2007 08:17	PM Adminis	tratorlong, S	Backdate: \	NO Item Added	Blinds:	Blinds do not close:	
08/10/2007 08:17	PM Adminis	tratorlong, S	Backdate: A	Appointment Cl	nanged Chang	ed from to N/A.	
08/10/2007 08:17	PM Adminis	tratorlong, S	Backdate: (	Created	Backda	ate on 08/20/2007 5:	14 PM 🗸

Figure 14: Work Order Details page showing the backdating log

#### Ability to View User Custom Fields in Assignee Info Dialog

Based on a "Display User Custom Fields in Info dialog" configuration setting (in Work Orders>Settings>Details), user custom fields can now be displayed on the dialog that appears when pressing the "Info" button on Work Order Details pages (see Figure 15). This provides additional information for dispatchers when selecting a user to assign to the work order.

Work Order # HE	Contact Information	n Webpage Dialog	X	<u>S</u> ave   Send/Print   <u>C</u> lose
Status: New	Contact Informa	ation		n- <u>H</u> old    Comp <u>l</u> ete    Ca <u>n</u> cel     <u>R</u> eOpen
Customer Informatio	Туре	Value		Super Suburbia
Customer:	User Name:	Joe Technician		Phone/Email: (913) 555-2424
Location:	UserID:	Joe Technician		Park, KS 66223
	Emergency Phone:			
Work Description	Office Phone:	(503) 218-4280		Add    Dalata    Wowa
Work Description	Mobile Phone:			
Service	Pager:			Disposition
A Electricity	Fax:			ty Not Selected 🔻
	Home Phone:	(000) 012-3456		Work Plan
	Email1:			
Assignment and Sch	Email2:			Update Work <u>f</u> low Settings
Priority: Regu	Email3:			Assigned To: 🔽 Joe Technician 🔽 Info
Start Time:	Insurance:	Not Applicable		Due But 11/2007 01:05 AM
Start Time:	Dog?	Yes		Due By: 7/23/2007 01:00 AM 됩
Duration: 1	Breed?	Rottweiler	_	Not to Exceed: \$0
	Birthdate	04/01/2000		P.O. Number:
		ОК		
Service History A				iancial
	50000 0 10	ab above to view more details for	una	Work Order.

Figure 15: Work Order Details Page showing Info Dialog with User Custom Fields

#### **Custom Tab**

A custom tab, based on a new module and privilege setting, may be made available to end users if the user has been granted the "Custom Tab – Display" privilege and the "Custom Tab" module has been enabled, as shown below:

Home Work Orders Assets	User Customer	Our Company	Reports Materials	Financial	
Role - URL Privileges					
Role Name: Admin *Home Tab Customer (Search)	×				
All Privilege Groups			*Assigned Groups		
Company - Documents Company - Lead Generation Sett Company - Project Mgt Company - Security Groups Company - Themes Customer - Groups Customer - Groups	ings	Grant	Assets - Asset Search Assets - Portfolios Assets - Properties Company - Custom Fie Company - Import/Exp Company - Import/Exp Company - Landmarks Company - Settings	ids lort Base	
Customer - Letters Customer - Requests Customer - Yacant Units	Modules				Save
Customer Portal - Announcemer					
Facility Manager - Announcemer	Enabled	Mod	dule Name		
Facility Manager - My Info Facility Manager - Requests		.NET	Dispatch Application		
		Crys	stal Reports Advanced		
R-Demined Field		Crys	stal Reports Basic		
Required Pield	<b>V</b>	Cust	tom Tab		
Copyri	V	Cust	tomer Integration		
		Cust	tomer Portal		

Figure 16: Custom Tab Privilege and Module

Administrators can define the tab's label and its content by configuring the system to bring up a URL within the tab's frame. The Custom Tab will be the first tab displayed. In the example below, the Custom Tab has been configured (Figure 17) to display Grainger's website (see Figure 18).

Company Preferences	01	K    Cancel
* Company Name: * Business Contact: * Technical Contact :	Your Company Properties Administratoriong, System Arbor@Pointe, Vendor	View     View
<ul> <li>* Customer* Service Phone/Email:</li> <li>Work Zone Short Names Unique:</li> <li>* Theme:</li> <li>* International Address:</li> <li>* Phone Number Format (xxx) xxx-xxxx:</li> </ul>	1231231234	
Voice Portal Inbound Phone Number:		
Custom Tab Label: Custom Tab URL:	Grainger Cat (Max. 12 characters) http://www.grainger.com/Grainger/wwg/start.shtml	Test

Figure 17: Custom Tab configuration in Company Settings, displayed only if module is active



Figure 18: Custom Tab showing Grainger's website displayed within CorrigoNet.

#### Repair Category and Code Added to Action Log

In order to provide better visibility into what repair category and code was used when the work order was completed, the action log on the Work Order Details page displays these fields as shown in the figure below:

Custom Ta	b Home	Work Orders Assets	User	Customer	Our Compar	ny Repo	rts Materials Financial	
Wor	· · · · · · · · · · · · · · · · · · ·		<b>D 1</b> - 1				e   Send/Print   <u>C</u> los	e
Statu	now Actio	on web Page	Dialog				np <u>l</u> ete    Ca <u>n</u> cel     <u>R</u> eOp	en
Custe A	ction: Comp	pieted					Demo Servic	e Area
Custo Pe	erformed By Joe	e Technician at 04/25/20	07 3:30 F	M			ii.	-
Re	eason: N/A						15	
Locat Co	omments							
Worl	Comments						dd    <u>D</u> eleie    <u>M</u> ov	e I
S							Disposition	848 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 - 1976 -
AA							Not Selected	-
11	0.000	Dass	vintion					
Assic De	enn anair Category	Heatin	nption				Update Work <u>f</u> low Settin	
Priori Re	epair Code	Adjus	ted therm	ostat			. 🗾 Joe Technician 💌	Info
Charle Ci	ause Description	n Comr	leted ove	r the phone			4/35/3007 04:00 PM	
Start							4/25/2007 04:00 PM	臣
Durat							ed: \$0	
						~	er:	
Sen					1	Close		
Actic								
Act http:/	//sf17.corrigo.c	om/CorpNet/asp/legacy	/maintmg	r, 💽 Internet				_
04/25/200	17 03·30 PM	loe Technician	Complet	ed			-	
04/25/200	17 03-29 PM	loe Technician	Started	00				
04/25/200	07 03:29 PM	Joe Technician	Picked U	n				
04/25/200	07 10:39 AM	System Administrat	WO Item	Added	A	/C Compre	ssor:Safety inspection requir	ed:
04/25/200	07 10:39 AM	System Administrat	Assignm	ent Changed				
04/25/200	07 10:39 AM	System Administrat	Appointr	nent Changed	С	hanged from	m to PTE.	
04/25/200	07 10:39 AM	System Administrat	Created			-		~
								10000000

Figure 19: Action Log Showing Repair Category and Code

#### **Vendor Portal**

#### Ability to Add a Decline Reason

Vendors will now be able to provide a reason for declining work orders so that dispatchers can determine why the work order needs to be reassigned. Previously, vendors could only decline work orders with no reason as to why it was declined. This provided limited information to dispatchers for reassignment. After a work order is declined and a reason is added, the decline reason will be displayed on the action log in the Work Order Details page.

Work Orders* My Info My Organizatio	n
Work Order* # ABCD0404	<u>S</u> ave   Send/Print   <u>C</u> lose
Status: New	Decline     Pick <u>U</u> p     <u>St</u> art    Attent <u>i</u> on   Comp <u>l</u> ete
*Customer* Information	.CCT20
Company: Your's Company Properties	*Customer*: AASASA Info Contact:
Location: OWOWOW	Address: 🕺 Veterans Redwood City_ Contact At*:
Decline Web Page Dialo	g 🛛 🔀
Decline	
Please enter any additional information the	at may be helpful.
Not certified to work on Yoyodyne unit	
F	Assigned To: BVendor
A	Not to Exceed: \$0
e	OK   Cancel   P.O. Number:
http://devsrv53.corrigo.com/CorpNet/asp/le	gacy 🧐 Internet Assigned Date: 2/14/2006
Created Date: 12/14/2005 09:25 PM	

#### Figure 20: Work Order Decline Reason in the Vendor Portal

#### Ability to Disallow Work Order Completion

There are several clients that do not wish to allow vendors to be able to complete work orders from the Vendor Portal because the work must be verified before the work order should actually be marked as "Completed". Thus, an "Allow Vendor to Complete Work Orders from Vendor Portal" setting can be set at the Work Order Settings – Workflow page that will enable or disable the "Complete" button on the Vendor Portal Work Order Details page.

#### **Portfolio View**

A portfolio scope has been added to several Vendor Portal pages so that work orders and invoices can be viewed for a portfolio as opposed to just a particular work zone. The following Vendor Portal pages will include the portfolio scope selector:

- Work Order Summary
- Work Order List
- Work Order Search
- Organization Summary
- Organization List
- Invoice

#### **Customer Portal**

#### WO Custom Fields on Service Request Wizard

Based on the configuration option "Display work order custom fields as part of the request wizard" (in Customer Portal settings), Work Order custom fields can now be displayed to customer contacts (i.e. the requestor) through the Service Request Wizard. This allows requestors to add more relevant and specific information to the work order than the asset/task/description provides. Previously, this feature was available only on the Corporate Web Portal's Service Request Wizard.

Company			Improving your quality of li	iving
	Serv	ice Request Detail	ils	20/2007
	This re	equest has not yet been submitted.	d.	
Verify Contact Infor Name: Phone/Email: Schedule: You gran	mation: Andrew Paik 9998887777 ted our technicians perm	nission to enter.		
Location	Item	Symptom	Add Another Item	
Exterior General Key Details: Additional Info:	Fencing / Railing	Gate Door / Latch		
Add Service Request Active alarm system Code VIN#	et Information ? O Yes O No			
	Submit	Request Cancel Reques	est	
	Copyright (c) 1	999-2007 Corrigo, Inc. All rights r	reserved.	

Figure 21: Service Request Wizard showing work order custom fields

#### Ability to Overwrite Contact Name on Service Request Wizard

When creating a service request, the contact name and phone / email fields can now be edited. This is convenient in the case where users share the same Customer Portal login information or where a user creates a request on another person's behalf. This is a configurable option which can be controlled by the "Allow to overwrite contact name in request wizard" setting.

#### Ability to Link Defined Printout to the Service Request Details page

Based on the "Show Link to Print Out" configuration setting, defined printouts can be viewed from the Service Request details page, as shown in the figures below.

S	Service Request Status			2/12/2007	
Service Request: CTP00019	A http://52.dell.ga.corrigo.com/?woid=125238tem	olD=95 - Rep	port - Wi	ndows Internet Explorer	
Status: New	File Edit View Favorites Tools Help	192			
Notes: Created	Print   15	and Tol   (	Close		
Link to Display Additional Details	🔆 Acme HVAC				
Request #: CTP00019	DELL Excelling Management			Week Order CTDI	
Schedule: N/A	PROPERTY INFORMATION	CONTA	TINEO	TON ODE: CIPO	
Task: Other:	Name: 0Corrigo Test Property	Contact	unro	Tony's Boozy's	
Additional Information:	Office: 000000001	Contact /	Phone:	111222333	
	Address: 123 my street , Pt Richmond CA 94801 , US	Fax	t thene.		
Name: Tony's Boozy's Phone/Email: 111222333	Name: Apostrophe's Customer Primary Phone: 111222 Fax: Email Tony's Boozy's@gmail.com				
Home	Service Request Details Contact Name: Tony's Boozy's Created By: Offine Client Created By: Offine Client	Contact Num Not To Excee	ber: 1112 id: 50.00	22333	
Home	Service Request Details Contact Name: Tony's Boozy's Created By: Offine Client Created By: Offine Client Work Order Details	Contact Num Vot To Excee	ber: 1112 id: \$0.00	22333	
Home	Service Request Details Contact Name: Tony's Boozy's Created By: Offine Client Created By: Offine Client (Work Order Details Co Status: New Due By: 0/1/2/2007 8:00 AM	Priority: Li Appointme	ber: 1112 td: \$0.00	22333	
Home	Service Request Defails Contact Name: Tony's Boozy's Created By: Offine Client Created By: Offine Client Work Order Details Cc Status: New Due By: 02/12/2007 8:00 AM Street Address: LB 12 road Kharkov's , P9 00123666 , O	Priority: L Appointme BType: Req	ber: 1112 ed: \$0.00 ow ent: N/A uest	22333	
Home	Service Request Defails Contact Name: Tony's Boozy's Created By: Offine Client Created By: Offine Client Created By: Offine Client Work Order Details Cc Status: New Due By: 02/12/2007 8:00 AM Street Address: LB 12 road Kharkov's , P9 00123666 , O Location: test LB Request Type Task Dis	Priority: Li Appointmi B Type: Req PO#: position	ber: 1112 ed: \$0.00 ow ent: N/A uest	22333	
Home	Service Request Details       Contact Name: Tony's Boozy's       Created By: Offine Client       Created By: Offine Client       Work Order Details       Status: New       Due By: 02/12/2007 8:00 AM       Street Address: LB 12 road Kharkov's , P9 00123666 , O       Location: test LB       Request Type       Task     Dis       Ocorrigo Test Property	Priority: Li Appointme B Type: Req PO#: position	ber: 1112 ed: \$0.00 ow ent: N/A uest	22333 Description	
Home	Service Request Defails       Contact Name: Tony's Boozy's       Created By: Offine Client       Created By: Offine Client       Work Order Defails       Status: New       Due By: 02/12/2007 8:00 AM       Street Address: LB 12 road Kharkov's , P9 00123666 , O       Location: test LB       Request Type       Task       Director Test Property       Other:	Priority: Li Appointme B Type: Req PO#: position	ber: 1112 ed: \$0.00 ow ent: N/A uest	Description	
Home	Service Request Details       Contact Name: Tony's Boozy's       Created By: Offine Client       Created By: Offine Client       Created By: Offine Client       Work Order Details       Status: New       Due By: 02/12/2007 8:00 AM       Street Address: LB 12 road Kharkov's , P9 00123666 , C       Location: test LB       Request Type       Task       OCorrigo Test Property       Other:       REQUIRED SIGNATURES       Work Accepted by:	Priority: Li Appointme BType: Req PO#: position	ber: 1112 ed: \$0.00 ow ent: N/A uest COMP Started Notes:	Description LETION INFORMATION Finished:	

Figure 22: Customer request details showing link to print details

When the user clicks on the link, a separate window displays the corresponding printout that is defined with the ".html file to display" setting that is enabled if the "Show Link to Print Out" setting is enabled. This provides a mechanism by which customers can associate whatever pertinent data they desire and can create in an HTML printout.

This allows clients to provide customers and contacts with access to whatever information they desire.

#### Ability to Default to "In Unit" when Creating a Service Request

A "Create Service Request inside Location" Customer Portal setting controls the ability to default the customer's unit when creating a service request if the user has access to only one location. This will alleviate the hassle of having to select the unit asset every time when adding multiple line items in the service request.

Customer Self-Service Portal Settings	Save
* Allow Empty Password (Applicable for Import/Export only):	Yes ○ No     No
* Allow Self Registration:	Yes ○ No     No
Domain:	corrigo.com
Email for Customer login id/password requests:	andrewi2@corrigo.com
Allow Customers to create emergency Service Requests via the self-service interface:	Yes ○ No     No
Backup phone for Customers to call in case of emergency:	2112223333
* Allow auto assignment from the Customers interface:	⊙ Yes ○ No
* Allow Customers to update their own information:	⊙ Yes ○ No
* Allow Customers to update passwords:	⊙ Yes ○ No
* Display contact custom fields in preferences:	⊙ Yes ○ No
* Maximum number of days Customers can view Completed or Cance Orders	lled Work 360 days
Disable "Cancel" button after Work Order has been picked up?	Yes ○ No
Constant Detaile	
<u>Service Request Details</u> * Display contact custom fields as part of the request wizard:	
* Display Work Order custom fields as part of the request wizard	
* Allow to overwrite Contact Name in request wizard	
* Show Assigned To:	Vas ONO
* Show Due By Date	
* Show Scheduled Start Date:	
Show Invoice Total for	Vender V Custemer
Show DMDM:	
* Show Action Notes:	
Show Link to Print Out	Vac No
html file to dicelou	Custemar
Create Service Dequest inside Space	
create service kequest filside space:	U TES U NO
*=Required Field	Save

#### Figure 23: Customer Portal Settings page

#### **Mobile Devices**

This section summarizes mobile device client changes coinciding with the Summer 2007 release. For more details on these features, please refer to the separate **Corrigo Mobile Device Client 5.3a Release Notes.** 

The following mobile devices will be supported with this release:

- Pocket PC 6700 and 6800
- HP iPAQ 6900
- Blackberry 8300

The following table lists the corresponding server locations necessary to upgrade to the new 5.3a supported mobile client:

Device	Client URL
Windows Mobile 5 Pocket PC Phone and above	http://ota.corrigo.com/WM5/5.3a/CMInstall.cab

BlackBerry with OS 4.1 and above	http://ota.corrigo.com/RIMg/5.3a/CorrigoMJ.jad
BlackBerry with OS 4.0	http://ota.corrigo.com/RIM/5.3a/CorrigoMJ.jad

#### Note:

5.3a mobile clients are not compatible with CorrigoNet version 5.2. Clients must first be on 5.3a before upgrading the device clients and taking advantage of the new features. However, clients may still use the 5.2 mobile client with the 5.3 mobile device server.

#### Daylight Savings Time Patch

**!Important!** Because of a change in the dates for the beginning and end of Daylight Savings Time beginning in 2007, Pocket PC-Windows Mobile users must download and install a patch form Microsoft to ensure accurate times and proper Corrigo operation on the device. Full instructions are available at the Windows Mobile website, http://www.microsoft.com/windowsmobile/daylightsaving/default.mspx.

#### Work Plans on Windows Mobile PPC

Work plan functionality, previously restricted to RIM Blackberry devices, is now supported on the Pocket PC device, the fastest-growing and most desirable device to handle field service operations. Work plans are particularly important for homebuilder clients, who use this functionality to manage the warranty service request process.

For a complete discussion of work plans on the Pocket PC, please refer to the separate **Corrigo Mobile Device Client 5.3a Release Notes.** 

#### Free-Text Punch List Notes

When completing Punch List tasks, technicians have been able to choose from a list of predefined exception notes to explain why an item cannot be completed, but there is no way to enter a free-text notes for the task. Punch List Notes, which are associated with a specific Punch List item, allow the technician to enter specific values or other comments for a particular item (see Figure 24).

19	Corrigo	Mobile		ii. ∳eii	% <b>  </b> ⊀€	×
Punc	h List: O	016		3 of	7 Com	olete
X	Check fo	or prope	r op			
X	🗐 Check fo	or leaks (	on s			Ŧ
X	Check p	ump and	l mo			
Π	Check a	lignment	of			19
	Lubricat	e pump a	and			Ŧ
	Clean e:					
	Fill out r	naintena	nce			
				A	tions	)
			1	A	ld note	2
			L -	Re	efresh	
Cust	om fields	Notes	Punch	M Ex	y Work tit	
	Back			r	Menu	

Figure 24: Adding Notes to a Punch List Item

#### **Re-Open Needs Attention and On-Hold Work Orders**

On-Hold and Needs Attention work orders can be displayed on the user's mobile device, but device users have not been able to re-open them. Users with the new "Mobile - Re-Open" privilege shall be able to re-open both On-Hold and Needs Attention work orders, giving a reason for the action as well (see Figure 25).

🏄 Corrigo	Mo	bile	- #i ¥i +€ Þ	×
BRIA0349 [Ne	BRIA0349 [Needs Attn]			
Reason:	Ne	ed Mgr R	eview / Approval	•
Customer:	<u>C/</u>	ASTELO,E	RLINDA	
Contact:	EF	RLINDA CA	ASTELO	
Email:	te	st@test	<u>.corrigo.com</u>	≡
Address:	35	6423 COY	OTE CREEK	
		DURT, ואַ 1. 92531	Tools	•
Asset pat	Re	Open	Actions	Þ
Asset:	Ð	chaust	Reassign	
Task:	D	ryer Ve	Asset details	
Disp:	<u>Ca</u>	ancelle	Asset History	
Desc:	<u>H</u>	/O said	Refresh	
	Di th	i <mark>at dry</mark> i	My Work	-
Summary Ite	ms	Childre	Exit	
Back			Menu	

Figure 25: Reopening a work order with status of Needs Attention

#### Editing of PO# and NTE

Mobile clients can now support the ability to edit the following work order fields:

- Access/appointment Time
- PO#
- NTE



Figure 26: New Privileges allow Appointment, PO#, and NTE to be edited

Access/Appointment Time and PO# shall be editable with the privilege: "Mobile – Create/Edit WOs". If the user does not have the privilege, then the fields are visible as read-only.

NTE can be edited by users with the "Mobile – Modify NTE" privilege only.

#### Historical Asset Attribute Values

Users can view the history of an asset attribute's historical values on their mobile device, which can potentially help to diagnose problems. The historical asset attribute values are available from a link within the asset attribute list, as shown in Figure 27. The History menu option appears when an attribute that is historical is highlighted.



Figure 27: Asset Attribute List and Attribute History Page

## **List of New Privileges**

The following privileges have been added in Release 5.3a:

New Privilege	Description
Permissions - Customer Addition	Allows users to create a customer record.
Custom Tab – Display	Allows users to access the custom tab.
User – Manage All	
Mobile – Reopen	Allows users to re-open work orders from a mobile device.
Mobile – Modify NTE	Allows users to modify the NTE field on a mobile device.

The following privileges have been renamed in Release 5.3a:

Old Privilege Name	New Privilege Name
Mobile Java - Manager Interface	Mobile - Manager
Mobile Web-All WO	Mobile - All WO
Mobile Web-Cancel	Mobile - Cancel
Mobile Web-Create/Edit WOs	Mobile - Create/Edit WO
Mobile Web-Edit Asset Attributes	Mobile - Edit Asset Attributes
Mobile Web-Find My WO	Mobile - Find My WO
Mobile Web-Find WO	Mobile - Find WO
Mobile Web-Material Search	Mobile - Material Search
Mobile Web-My Wos	Mobile - My WOs
Mobile Web-On Hold	Mobile - On-Hold
Mobile Web-PM List	Mobile - PM List
Mobile Web-Reassign WO	Mobile - Assign WO
Mobile Web-Set Bill back	Mobile - Invoice
Mobile Web-Time Card	Mobile - Time Card
Mobile Web-Unassigned	Mobile - Unassigned
Mobile Web-Unassigned PM	Mobile - Unassigned PMs
Mobile Web-Work Plan	Mobile - Work Plans
Mobile Web-Display Configuration	Mobile Configuration - Display
Mobile Web-Bookmarks	Mobile Configuration - Bookmarks

## **Additional Defects and Extensions Addressed**

The following is a list of other issues (Defect Fixes, Extensions and Modifications) covered in the Summer Update, by Tracking ID#:

#### Corporate Web:

Issue Id	Subject
46	Work order dependency is correctly displayed in the view/edit dialog box on the Dispatch Board
601	Survey emails appear correctly in email clients
1331	Closed "Loophole" which allowed access to PMRM schedules without the correct privileges
2259	Privacy policy is up to date
2338	Attached warranty policy is displayed in the WO print out
3843	Added two more entries for Cylinder type field

5080	Map Board correctly displays the "Landmarks" tab
4076	Special characters are now allowed in almost all text fields allowing for the use of non-English keyboards and alphabets. (Note: does not support double-byte characters like Chinese, etc.)
4266	PMRM WO assigned to a vendor with expired insurance does not change to needs attention status
4829	Surveys are allowed on work orders created through WO details page
4831	Upgrade does not overwrite print template visibility settings
5135	All work orders can now be viewed in work order list pages
5270	Roles with higher ranks are restricted to users with lower ranked roles
5326	PM schedules with assignment to a non-default team generate work orders assigned correctly to the non-default team
5403	More than three digits are allowed on WO Search cancelled/completed filters
5436	Size limitations in Letters increased to 20K chars
5440	Added Last Web Log-in to "Assigned to" Info dialog. Addresses: request to have Vendor Portal user info identified in the WO Details screen
5445	Added ability to enter comments when Manually Sending WO's via email
5773	Duplicate request is no longer created if the user presses refresh on the Confirmation page of SR Wizard
5893	Work plan age stops accruing when all child work orders are completed
6004	PMRM Schedules can no longer be imported with assignment to 'Inactive' users
6384	Invoice print out services total and tax field in the Costs section displayed correctly
12943	Notification By Mobile Device contact notification is still available if the Mobile Web module is disabled

#### **Customer Portal:**

Issue Id	Subject
2360	Customer portal does not stay active when a site is offline
4887	The display of the Submitted and Status fields are swapped

#### Vendor Portal:

Issue Id	Subject
4690	Visibility of space start/end dates to vendor WO details page is now available
5908	Tax' description is now optional when adding costs to vendor invoices.
6498	Removed "Edit" button from the Decline work order dialog
	Users can no longer enter more characters in the Decline dialog than what can be
6499	saved
	Vendors completing a parent WO with active children get meaningful error
12814	message than displaying "4"

#### **Reports:**

Issue Id	Subject
1628	Added "move out date" as a reporting column
2320	Added "labor code description" to the available columns in the User > Time Card report
2938	Other assigned (e.g.: Secondary) users can now be reported on from the WO Details wizard report template.

4267	Email format handled properly for report subscribers
5572	Customer Custom Fields in Report Wizard - WO Details are now exposed
5672	5.2 report exporting (TIFF, PDF) does not add blank page between data
	"Employee ID" in the Financial/Vendor Invoice report type of the wizard is now
6190	exposed
6190 6193	exposed Weekly report subscriptions get sent correctly
6190 6193 6431	exposed Weekly report subscriptions get sent correctly Added Customer Notes to the customer wizard template.
6190 6193 6431 6447	exposed Weekly report subscriptions get sent correctly Added Customer Notes to the customer wizard template. Mis-named report column in "Portfolio Performance - By Team" report is fixed

#### **Miscellaneous:**

Issue Id	Subject
4398	Upgraded Telenav Integration Servers
5097	Replaced Phone/Email field for KHOV's theme
5490	Re-importing work orders with custom field values results in the values being removed
5793	Added "CUSTOMER GROUP" to Import/Export
5863	Created new theme for Turner.
6586	Created a new customer portal theme for Airserv.

#### **Devices:**

Issue Id	Subject
96	WO created from Mobile Java gets created with the correct selected team
4443	Completion note length is consistent with Corp
6405	Content and length of PO# field on devices are consistent with Corp
6406	Content and length of NTE field on devices are consistent with Corp
6434	User can save cleared PO# field after it was previously saved with a value
	PO# and NTE values entered from Corp are properly reflected on the mobile
6448	device
6548	Count of completed children on the work plan list page is displayed correctly
6594	Deleted Labor Codes are no longer available for selection on java

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