Summary

The spring 2014 7.9a release supplements the features released in version 7.9. Combined, 7.9 and 7.9a encompass the 7.9 release. Upon upgrade, please be sure to review both sets of release notes to understand the full scope of the release.

There are 2 main features that highlight the 7.9a release:

- **Service Provider Tax Verification**

  Users of the CorrigoNet Enterprise application now have the ability to verify the exact tax amounts being invoiced by their Service Providers over the Work Order Network by utilizing the Avalar AvaTax Engine. Upon invoice review charged tax amounts can now be audited proactively through the CorrigoNet Enterprise system to alleviate the manual burden imposed upon users AP Departments. Service Provider Tax Verification is suitable for any client using Providers who invoice the client “retail”, and therefore charge tax.

- **Mobile Feature Updates to iOS and Android**

  Much of the 7.9a release is related to mobility and includes major feature upgrades to both the Android and iOS CorrigoNet Mobile Apps. Some of these features include: access to documents, mobile service fees, mobile work plan views, localized language customization, updates to equipment records, and much more. As stated in detail below, Mobile Updates will come in two phases with an initial release occurring Mid-May followed by a final release, which will include all new mobile features, in Mid-June.
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Work Order Network Enhancements

Service Provider Tax Verification

Users of the CorrigoNet Enterprise application now have the ability to verify the exact tax amounts being invoiced by their Service Providers over the Work Order Network by utilizing the Avalara AvaTax Engine. Upon invoice review charged tax amounts can now be audited proactively through the CorrigoNet Enterprise system to alleviate the manual burden imposed upon users AP Department. Service Provider Tax Verification is suitable for any client using Providers who invoice the client “retail”, and therefore charge tax.

When enabled and configured properly, Service Providers will now be warned, upon invoice submission, when the tax amount they specified on their invoice does not match the tax rate as calculated by using Avalara AvaTax.

For tax verification to work for your Corrigo Enterprise Account you must first enable the tax verification feature by working directly with your account manager.

How it Works

Once properly configured, the process would work as follows:

1. The Service Provider creates and submits and invoice online, over the work order network as they have always done
2. At the moment it’s submitted, the invoice is now analyzed and the tax amount is compared to that in Avalara’s AvaTax system
3. If the tax amounts:
   a. **Match,** the invoice is submitted
   b. **Do not match,** the Service Provider is either warned (as seen in Error! Reference source not found.) about the discrepancy and still allowed to submit OR is prevented from submitting the invoice completely depending upon the desired settings

Figure 1: Warning when vendor tax does not match tax as calculated over the work order network

4. Once the invoice is received, the invoice’s tax verification status (as shown in Figure 2) is visible as part of the invoice authorization to pay process in the CorrigoNet Enterprise System.
Configuration

In order for Tax Verification to work, it is critical for the system to be configured properly.

In a nutshell it works like this: a Service Provider submits an invoice that contains one or more line items. Each of those line items MUST map back to a Tax Code in AvaTax. The mapping occurs through the Invoice Items set up in the CorrigoNet Enterprise application. During tax verification, CorrigoNet asks AvaTax: At this address, is this item taxable? And, if taxable, at what rate?

Configuration has been divided up into three steps which your account manager can assist with in detail:

- **Basic Configuration**
  This involves creating an Avalara AvaTax account, linking it to the CorrigoNet Enterprise instance, and setting up tax codes in CorrigoNet that map back to Tax Codes in AvaTax.

- **Invoice Item Configuration**
  This involves setting up the CorrigoNet system’s Invoice Items and, in some cases, Provider and/or Customer Price Lists.

- **Provider Settings**
  This involves setting up the prompt behavior which a Service Provider receives.

Once Again, for tax verification to work for your Corrigo Enterprise Account you must first enable the tax verification feature by working with your account manager. Your Account Manager will guide you through all the necessary configuration steps in detail.

What Provider Tax Verification Looks Like to the Service Provider

The Service Provider shall see a warning appear (as shown below) if they are attempting to submit an invoice in which the tax is presumed to be miscalculated.
If the Service Provider then clicks on the “Click here to see why” link within the error message they will see the exact details as to why a tax error occurred (as shown below).

![Figure 3: Warning provider receives when tax verification fails](image)

**Figure 3: Warning provider receives when tax verification fails**

If the Service Provider then clicks on the “Click here to see why” link within the error message they will see the exact details as to why a tax error occurred (as shown below).

![Figure 4: Tax details as presented to the provider](image)

**Figure 4: Tax details as presented to the provider**
In this scenario, the Provider will still be able to submit the invoice by pressing “Ok”. However, the Provider invoice would appear as shown below in the Requestor's CorrigoNet Enterprise System, with a Tax Verification status of “Failed” in red.

![Invoice Details]

Figure 5: Vendor invoice that has failed tax verification

Clicking on the “Tax Verification Failed” button brings up the detail dialog shown below explaining the details of the fail notification.

![Tax Details]

Figure 6: Tax detail as seen in CorrigoNet
Tax Verification in CorrigoNet Enterprise
Like shown above in the "Warn" example invoices submitted receive a tax verification status of either:

- Failed – “Tax Verification Failed”
- Passed - “Tax Verification Passed”
- Not Verified – “Tax Verification”

On the WO Details>Vendor Invoice these appear as the above colored text shown on the tax verification (as shown below).

Tax verification also appears on the Vendor Invoice review page as shown in the two images below.

Figure 7: Vendor Invoice Review page

Figure 8: Detail from vendor invoice review page showing tax verification status

Tax Verification Gets Resets if Vendor Invoice is Changed
If a Provider Invoice is modified the tax verification status is reset to a Not Verified status. This is what's depicted in the image below. When the user presses this button, Tax will be Re-Verified and the results will appear on the details dialog (as shown below).
Figure 9: Vendor Invoice that has been disputed (and thus made editable) gets Tax Verification reset to Not Verified which appears as a button with Blue Label of "Tax Verification"

### 3rd Party Tax Calculation Details

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Tax Amount</th>
<th>Tax Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor</td>
<td>Labor - Repair</td>
<td>$0.00</td>
<td>9.25%</td>
</tr>
<tr>
<td>Materials</td>
<td>Part - TPP</td>
<td>$0.55</td>
<td>9.25%</td>
</tr>
<tr>
<td>Materials</td>
<td>Cleaning Products</td>
<td>$1.85</td>
<td>9.25%</td>
</tr>
</tbody>
</table>

Total: $2.40

Tax Amount Submitted in Invoice: $2.40

Figure 10: Tax Verification Details Dialog
“Due-By Date” is now updated in WorkTrack

This enhancement addresses the need to automatically update the due-by date in the Service Provider’s system when an update is made by the requestor of the service. Updating the due by date in the CorrigoNet Enterprise system now automatically updates the Due By date in Work Track.

Customer Portal: New Rule for Low Priority WOs

This new Customer Portal assignment rule keeps lower priority work orders from being automatically sent to providers. The business case for this is, in the event there is active management of work on the requestor side, non-time sensitive work orders might be most efficiently bundled (e.g.: by trade and geographically) resulting in fewer trips and lower overall costs.

A new setting in the “Supported Workflows” section of the “Customer Portal” theme settings displays as: “Automatically send new provider work orders of this or higher priority:”

<table>
<thead>
<tr>
<th>Automatically send new provider work orders of this or higher priority:</th>
</tr>
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<tbody>
<tr>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
</tbody>
</table>

This setting replaces 2 previous Yes/No settings: “Automatically send any work order in the new status” and “Always send emergencies, irrespective of the above setting”

Upon upgrade here are 3 cases for what those previous two settings would transition too:

Case 1:

- When “Automatically send any work order in the new status” = Yes
- Always send emergencies, irrespective of the above setting= No

With Upgrade: setting shall be set to the lowest priority configured for the system

Case 2: When:

- Automatically send any work order in the new status = No
- Always send emergencies, irrespective of the above setting= Yes

With Upgrade: setting shall be set to the highest priority listed in the system

Case 3: When:

- Automatically send any work order in the new status = No
- Always send emergencies, irrespective of the above setting= No

With Upgrade: new setting shall be set to Never
Submit 0 item invoices
Currently, a Service Provider experiences an error and must add $0 line item if they want to submit an invoice. Now, $0 item invoices can be submitted by providers.

“Back-Office” Enhancements

Subscription Report Name is now Email Subject
To better distinguish between incoming subscription report emails, the Subscription Name, rather than the report name, shall be the subject of the email produced by the subscription.

*Important Note: This applies to new and updated subscriptions only. Existing subscriptions, which are not updated or manually re-created manually, will retain their original e-mail subjects.*

Simplified Specialty Dispatch Import/Export
A new Import/Export template is available that allows for simplified, distributed management of Specialty Dispatch List. This allows for the easy definition of the 1st resource in the work zone’s specialty based auto-routing table. Does not affect or update 2nd, 3rd, 4th places for a given specialty.

An example of the import/export is shown below. The work zone numbers are in the far left column and all of the specialties make up the rest of the column headers.

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<th>WorkZoneNumber</th>
<th>Electrical</th>
<th>Energy Management System</th>
<th>Equipment - Food Prep &amp; Prod</th>
<th>Fire Suppression</th>
<th>Furniture Repair</th>
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</tr>
</tbody>
</table>

*Figure 11: Example of Simplified Specialty Dispatch Import*
**Work Plan with Children Now Visible**

Viewers of the Work Order details page can now see when there are child work orders related to a parent without having to launch into the Work Plan view. When a Work Plan exists, the hyperlink "Work Plan w/ Children" is seen as depicted below.

![Work Plan with Children Now Visible](image)

*Figure 12: Detail from Work Order details page as seen when the work plan has a child.*

**Bid Manager Access**

The old Sourcing option found under the Work Order Network tab has been removed and replaced with single sign on access to the new Work Order Network Bid Manager App. This new sourcing tool will now allow users to actively procure new work out to both connected and non-connected service providers. If not looking to start a formal procurement cycle please visit [sourcing.workordernetwork.com](http://sourcing.workordernetwork.com) for the Work Order Network Provider Directory.

![Bid Manager Access](image)

*Figure 13: Bid Manager page that launches the Bid Manager*
Customer Portal/Management Enhancements

Option to Highlight “Contact Us” label

Users now have the ability to make the ‘Contact Us’ label on the Customer Portal home page more prominent. i.e.: Displayed in larger, bold, red font.

![Customer Portal Theme Settings page](image1)

**Figure 14:** Customer Portal Theme Settings page

![Customer Portal page with Contact us on "Bold" setting](image2)

**Figure 15:** Customer Portal page with Contact us on "Bold" setting
New Customer Invoice Template
A 3rd Customer Invoice Print Template was added that combines the 2 existing summary and details templates. The new template can be seen in the Billing Account Admin page as shown below.

![Billing Account Admin page](image)

Figure 16: Billing Account Admin page

Mobile Apps

7.9a iOS
There will be 2 successive releases for the 7.9a iOS. The first should be available in the App store by May 16\textsuperscript{th}, the second should be available in early June.

The newest version if the iPhone app uses the iOS 7 design language which changes the look of some of the visual elements but otherwise does not change the application.

7.9a iOS “First Release” Features:
• Mobile Work Plans
• Access to documents
• Customer Custom Fields
• Localized Language Support
• Ability to Edit Completion Notes on Completed WO
• Access to update non-historical attributes

7.9a iOS “Second Release” Features:
• Access to Service Fees
• Equipment Worked On
• Ability to change asset
7.9a Android
There will be 2 successive releases for the 7.9a Android. The first should be available in the Play store by May 9th. The second should be available June 1st.

7.9a Android “First Release” Features:
- Service Fees
- Access to documents
- Customer Custom Fields
- Localized Language Support
- Ability to Edit Completion Notes on Completed WO

7.9a Android “Second Release” Features:
- Mobile Work Plans
- Equipment Worked On
- Ability to change asset
- Access to update non-historical attributes

Mobile Features

Access Documents on Mobile Devices
This enhancement gives field users access to WO document attachments from the mobile application. Previously, documents attached via the desktop application would not be visible on the device, nor would pictures taken from the device. Now all attachments are visible and accessible in real time between desktop and mobile. Please note: the ability to open a given attachment depends on enabling apps on the specific device. For example, an excel file will not load on an Android phone without some third party app (MS-Office 365 or other reader) available to display it.

Enable Service Fees on Mobile App
This feature allows third party service providers using Corrigo Enterprise to manage service fees (select/edit items from Customer Price lists) in the field for eventual invoicing to Customer.

2 mobile privileges control the visibility of Service Fees:

Mobile – Service Fees
This privilege gives mobile users access to the Service Fee line on the WO Details (as shown below), as well as the ability to add & edit services fees in the work order. Note service fees require a configured Customer Price list to be present.
Mobile – Display/Edit Service Fee Rates

This privilege gives the user access to see the rates associated with the service fees. It should be used in all cases except when rate information is confidential and needs to be kept hidden from the mobile user. If this privilege is not granted to user then the row in as depicted below would simply show a count of items.

Figure 3: WO details showing "Service Fees" line
Clicking on the Service line takes the user to the Service fees page as shown in Figure below. Clicking the plus sign at the top of the Service Fees page will display the Price list as shown in Figure.

![Figure 18: Service Fees page](image1.png)

![Figure 19: Price list](image2.png)

Selecting any item off the price list will take the user to the service fee detail page illustrated in Figure  and Figure.

The two images below show the difference between users with the privilege Mobile – Display/Edit Service Fee Rates Figure, and without the rate privilege Figure.
NOTE: Service Fees only make sense when the price list item is a fixed fee, as opposed to a mark-up % or amount. However, non-fixed rate items are visible when adding service fees.

**Work Plans on Mobile Devices**
This enhancement allows the management of work plans from the current generation of mobile apps.

**Create a Child**
From the WO details, user can select the action button and will see a dialog that now includes “Add Child WO” as seen in Figure, below.
Figure 22: Image of iOS WO Details with action dialog showing add child.

Select “Add Child WO” will take user to a page to select which Work Order line item to create the child from. If there is only a single line item it will already be selected.

After the WO line item is selected, the child gets created and the user is presented with the child WO details as shown in Figure. Note that the user can go back to the parent from the upper left hand breadcrumb.
Figure 23: Child WO Details on iOS

From the parent WO (Figure ) users can see a count of the children and access the children by clicking on the Children row, which will take user to a list of children. (Figure )
Figure 24: Parent work order showing count of children

Figure 25: Detail of “Children” page
Localized Language Support for Mobile Devices
The mobile apps now have the ability to be localized in to a language other than English. Russian and Spanish language translation packs are available for both iPhone and Android. **Note: As with any localization, the translation applies to text strings and labels but not necessarily data crated by using the application. This means, amongst other things, notes, asset names, location names, etc. do not get automatically translated.**

Customer Custom Fields on Mobile Apps
Customer custom fields are now available on both iOS and Android. These are visible on the Customer Details page accessed from the Work Order details page.

Mobile Equipment Worked On Records
This enhancement allows technicians to record Equipment Worked On. The feature is not available in the initial releases of the mobile apps. Supplemental release notes with this feature will be created when the feature is made available.

Other Changes/Fixes

**Corporate Web**
- Modifications to warranties import exports: allowing the ability to make inactive on import (through Delete action) and ability to export warranties by portfolio
- Increased character limit in vendor 'send message' to allow up to 2900 characters of text.
- Customer Contacts are now mark as removed instead of purged upon deletion.
- Fix to display default exception notes for ad-hoc punch list items on the WO Details page
- Fixed default calendar control to "today" on Turns board when no Move Out date has been specified - previously defaulted to year 1900
- Refrigeration Import/Export: Added support for deleting transactions to the historical refrigerant transaction import and add an export capability
- Fix to Customer Price List Access - From Back Office, Work Order Details, when accessing Customer Price Lists, by default a specialty price list will now be shown with an option for user to "back-off" to a merged specialty + default price list.

**Customer Portal**
- Modified customer selection on customer portal WO creation when selected location is an active space for multiple active customers. If a unit is linked to multiple active customers and a contact creates a work order via the customer portal, the work order will now be created for the customer record which the contact is assigned.
Reports

- Provider Custom Fields have been added to Wizard Reports: User> Basic List
- Fixed issue where WOs without action reason don’t display on wizard report if “not starts with” filter is used for Reason field
- Add the field "Possibly Covered Under Warranty" into the Work Order Details wizard template
- Extended User Basic List wizard report template to include provider custom fields
- Reports - Financial report wizard> work order data section – add “created by”
- Reports - Show Provider Label in AdHoc Reporting for Providers

Mobile App

- Removed private notes from Mobile App signature capture form/image
- Mobility - Completion Notes - Previously technicians could not add completion notes via mobile app once the WO was completed. This was a design flaw as the user was unable to return to the completion note in app but completion notes are not restricted on other UIs. This is now modified so user has access to completion note detail from a completed Work Order details > Completion Note > which also allows user to update the completion note.
- Fix to defect where chargeback was visible on mobile app but should not be due to permissions

WorkTrack

- Disconnect of Providers from WON should be unambiguous on CorrigoNet
- Changed sort order on display of results from global search to descending so newest objects are listed first.