PEERASSIST

GETTING STARTED

Congratulations on purchasing your new Field Work Order solution from PeerAssist!
As the Account Administrator for your company, follow the check list below to ensure you get off to a great start. Let us know if you need any help in the process.
support@peerassist.com

- Log in to your new account at **mypeerassist.com**
- Set up your company details under the "**Manage Company**" tab
- Import a ***BILLING*** template from "**Import Templates**" icon
- Import a ***TRADE*** template from "**Import Templates**" icon
- Import a ***ROLE*** template from "**Import Templates**" icon
- Customize your ***BILLING*** template from "**My Templates**" icon
- Customize your ***TRADE*** template from "**My Templates**" icon
- Customize your ***ROLE*** template from "**My Templates**" icon
- Create and upload **Customer CSV**
- Create and upload your **Material CSV**
- Create and upload your **Employee CSV**
- Create and upload your **Project CSV**
- Make use of the "**getting started tips & tools**" links on the training and support webpage.