



PEERASSIST

Field Work Order

Managing Company

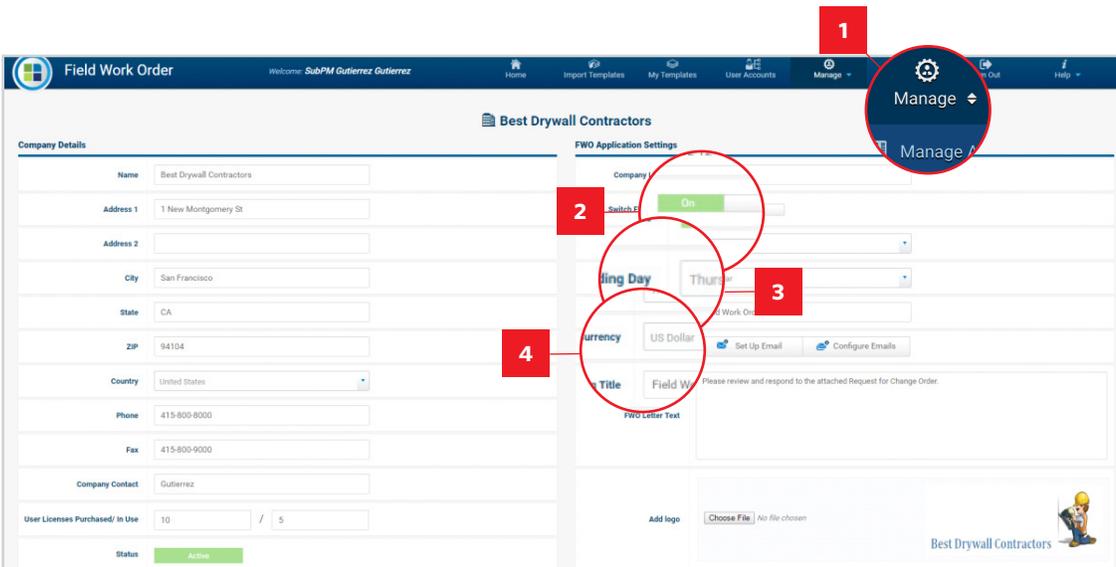


Manage Company Details

Manage Company Details | Part I

Completing Your Setup

- 1 As a User with **Administrator Role** permissions you can click on the “**Manage**” tab, and select “**Manage Company**” to edit your company details. The existing data you see entered in each field was saved upon purchase of the FWO product. Now you can save additional data to complete the set up.
- 2 Selecting **FWA Request “On”** will switch this feature on across ALL projects. Selecting **FWA Request “Off”** will switch it off across ALL projects. This feature can also be switched on/off at the individual project level.
- 3 Change the **Week Ending** date by clicking on the down arrow and selecting the desired day of the week. This is used to display the correct week ending date for your company on the work order documentation.
- 4 Change the recognized **default currency** by clicking on the down arrow and selecting from the list of available currencies.



Manage Company Details | Part II

Completing your Setup continued

5 **Edit the standard message** of the FWO Letter Text that will be presented on each completed Change Order Request. Example: "A request for change order has been submitted. Please review and respond at your earliest convenience." This letter will be attached to the price breakout, copy of the work order and any supporting documentation you select.

6 Add your company logo by clicking on "**Choose File**" and upload an image from your files. This logo will be used on all Field Work Order correspondence. This includes the change order letter, work order and price breakout. **Locate the logo** on your computer, Open the File to upload to the program.

7 Optional: Set up your main company email and **test the configuration**. This is the address your customers will see when emails are generated from FWO. If you choose to skip this step, emails will be sent from the default Field Work Order email account for PeerAssist.

8 **Configure** the type of emails your company sends to your employees and customers by checking the appropriate boxes. This can also be done at the individual project level.

