PEERASSIST

Field Work Order

Managing Projects

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Related:

Creating a Project CSV

Managing Projects | Part I

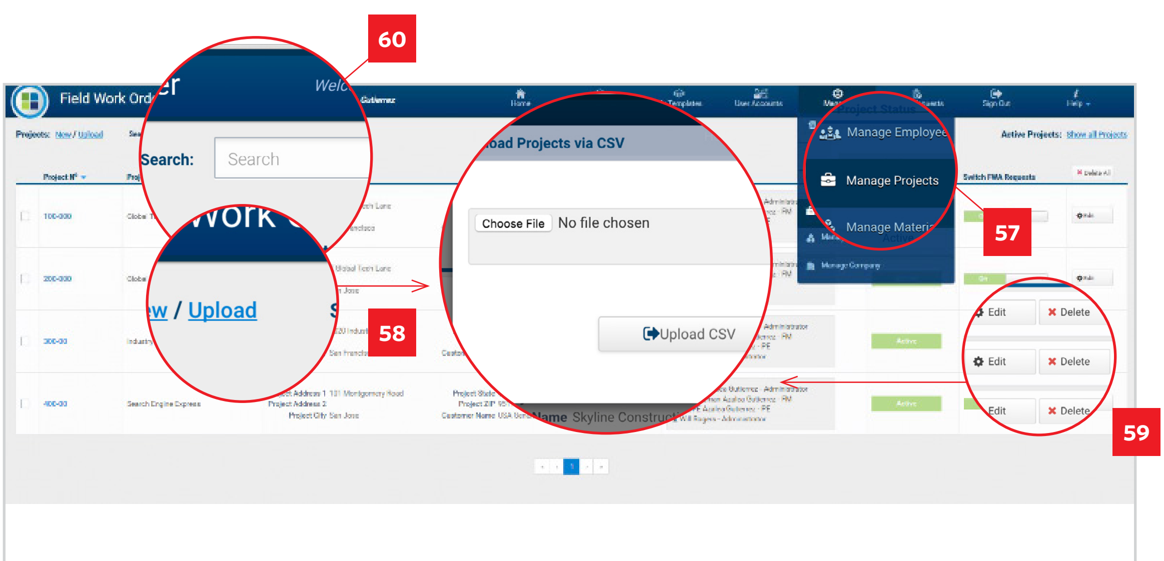
Import a Project Master List

57 Hover over the “**Manage**” Tab then select “**Manage Projects**”.

58 If this page is blank when you arrive, click “**Upload**” to save a CSV file. Select “Choose File” from the popup window, select your CSV file, then click “**Upload** CSV”.

59 Changes to your project information or status may be made anytime by clicking on “**Edit**”.

60 **Search** for a specific project by typing in the project name.



Managing Projects | Part II

Add New/Edit Project: Enter Project Information

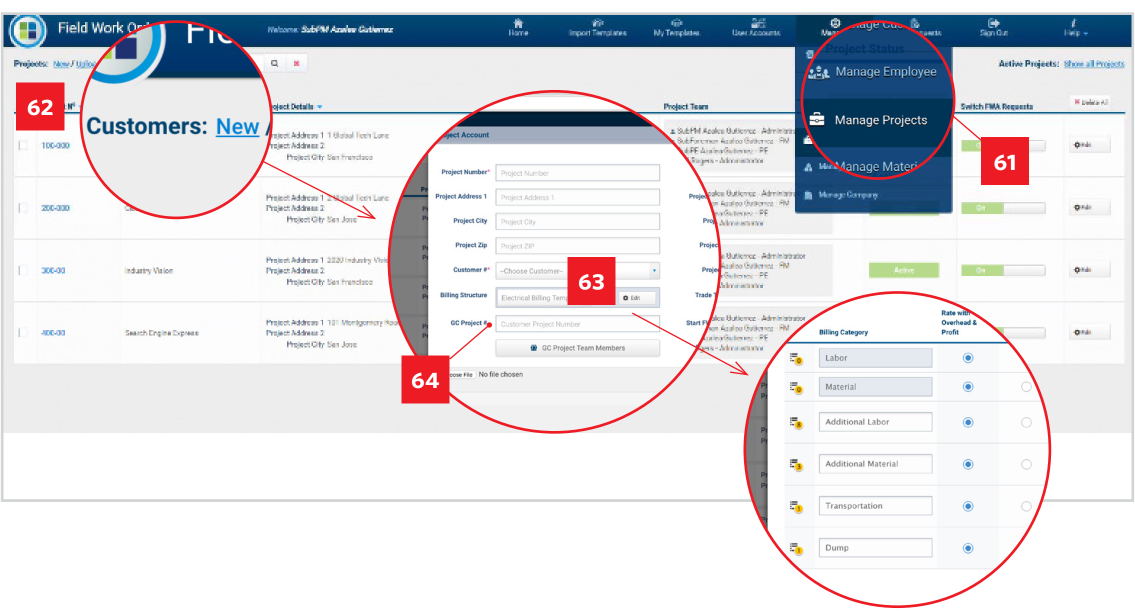
61 Click on the “**Manage**” tab then select “**Manage Projects**”.

62 Click “**New**” to add a project, enter the data and click “**Save**”.

- **Project Number:** Your company’s identifying project number.
- **Project Address:** The address of where the project is located.
- **Customer:** Select from available customers.

63 **Billing Structure:** Select from the additionally imported Billing templates if you will not be using your default company billing template. Once a billing template has been selected, you may edit it.

64 **GC Project #:** Enter Customer’s project number.



Managing Projects | Part III

Add New/Edit Project

65 **GC Project Team:** Select which GC contacts to add to the project. They will receive email correspondence from FWO.

- Click the check box to allow the team member permission to approve an FWA.
- You may also add or delete a new GC project team member here.

66 Enter **Project Account** information:

- **Project Name:** Enter your project name.
- **Project Address 2:** Floor, suite, building number
- **Project State:** Enter the project's state.
- **Project Status:** Select "Active" or "Inactive" project status.
- **Project Team:** Select the internal project team members you want to include on the emails and permissions for this project.
- **Trade Template:** Select from the available imported trade templates if using a template other than your company default. Once a selection is made, you may edit the template's trades and rates for this project only.
- **Start FWA Number**: Define what number you want the FWAs to start from.
- **Project Contact:** Select which internal team member you want as the main project contact. I.e., Project Manager.
- "**Save**" your entries and selections.
- **Email Configuration**: Set the email preferences for your project for both the GC and your internal team.