



PEERASSIST

Field Work Order

Managing Projects



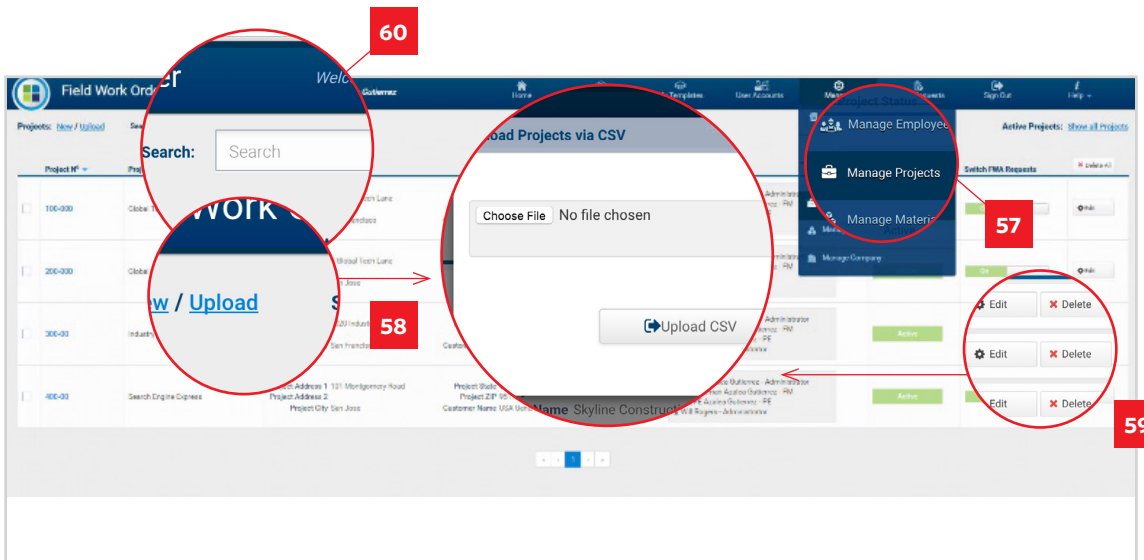
Managing Projects

Related:

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

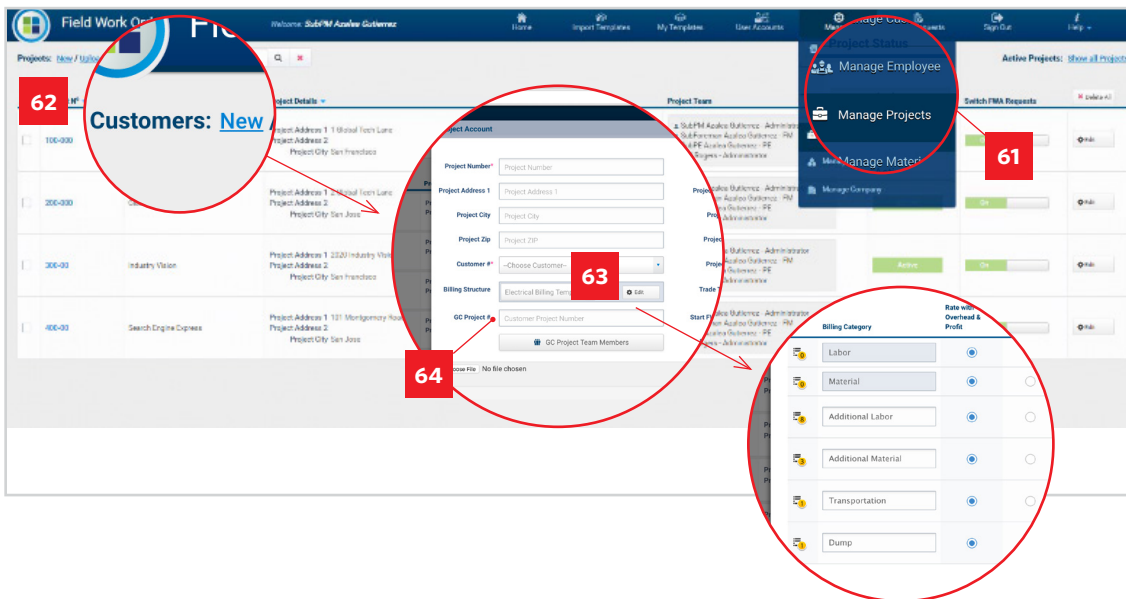
61 Click on the “**Manage**” tab then select “**Manage Projects**”.

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

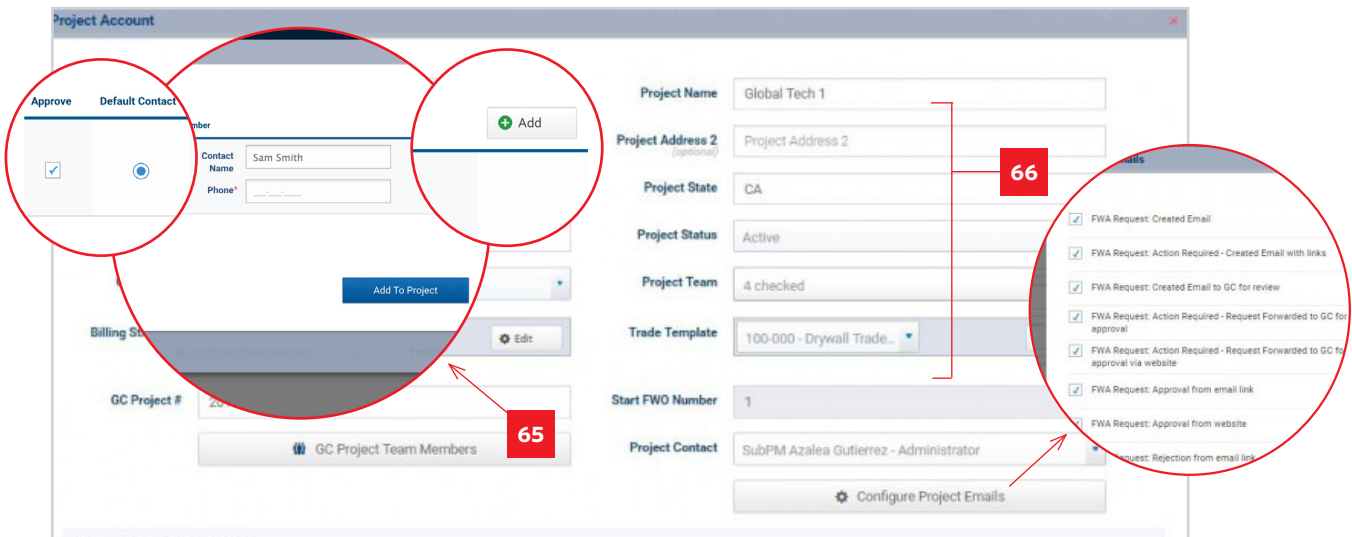
GC Project Team: Select which GC contacts to add to the project. They will receive email correspondence from FWO.

- 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.



The screenshot shows the 'Project Account' form with several callouts:

- Callout 65:** Points to the 'GC Project Team Members' section, specifically to the 'Approve' checkbox and the 'Add' button.
- Callout 66:** Points to the 'Project Name' field and the 'Project Address 2' field.
- Callout 66 (continued):** Points to the 'Email Configuration' section, specifically to the 'FWA Request: Created Email' checkbox.

The form fields include:

- Project Name: Global Tech 1
- Project Address 2 (optional): Project Address 2
- Project State: CA
- Project Status: Active
- Project Team: 4 checked
- Trade Template: 100-000 - Drywall Trade...
- Start FWD Number: 1
- Project Contact: SubPM Azalea Gutierrez - Administrator

The 'Email Configuration' section includes checkboxes for:

- FWA Request: Created Email
- FWA Request: Action Required - Created Email with links
- FWA Request: Created Email to GC for review
- FWA Request: Action Required - Request Forwarded to GC for approval
- FWA Request: Action Required - Request Forwarded to GC for approval via website
- FWA Request: Approval from email link
- FWA Request: Approval from website
- FWA Request: Rejection from email link