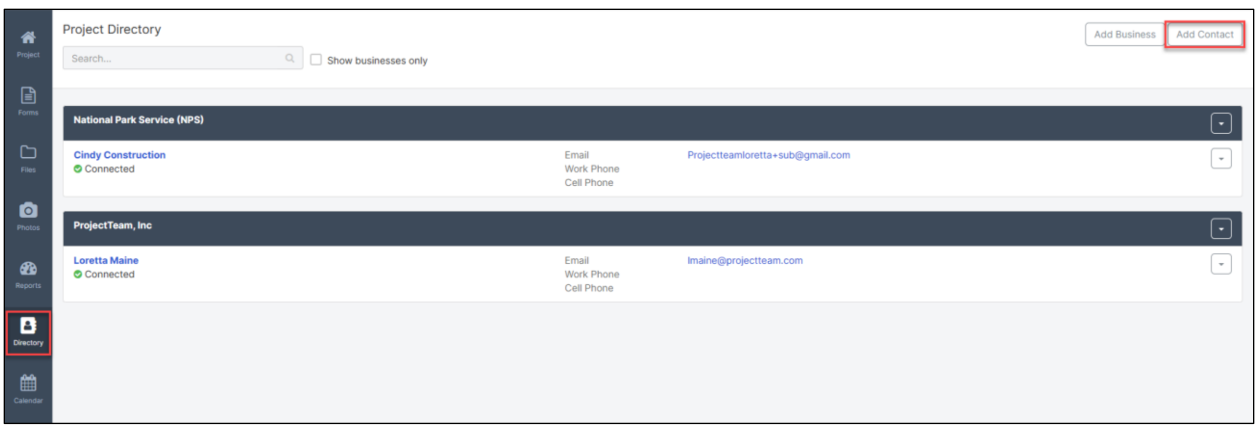
Project Directory

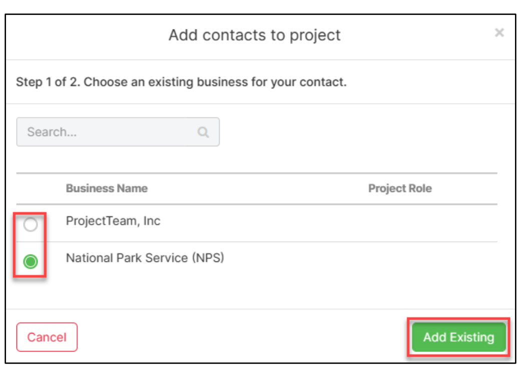
The Project Directory is the address book for the project. Users are invited to a project and assigned to Groups from the Project Directory.

Add Existing Contacts or Create a New Contact

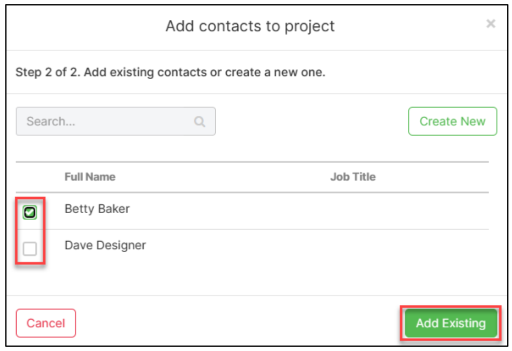
1. Navigate to the **Directory** icon on the left navigation pane.
2. Click **Add Contact** from the upper right corner.



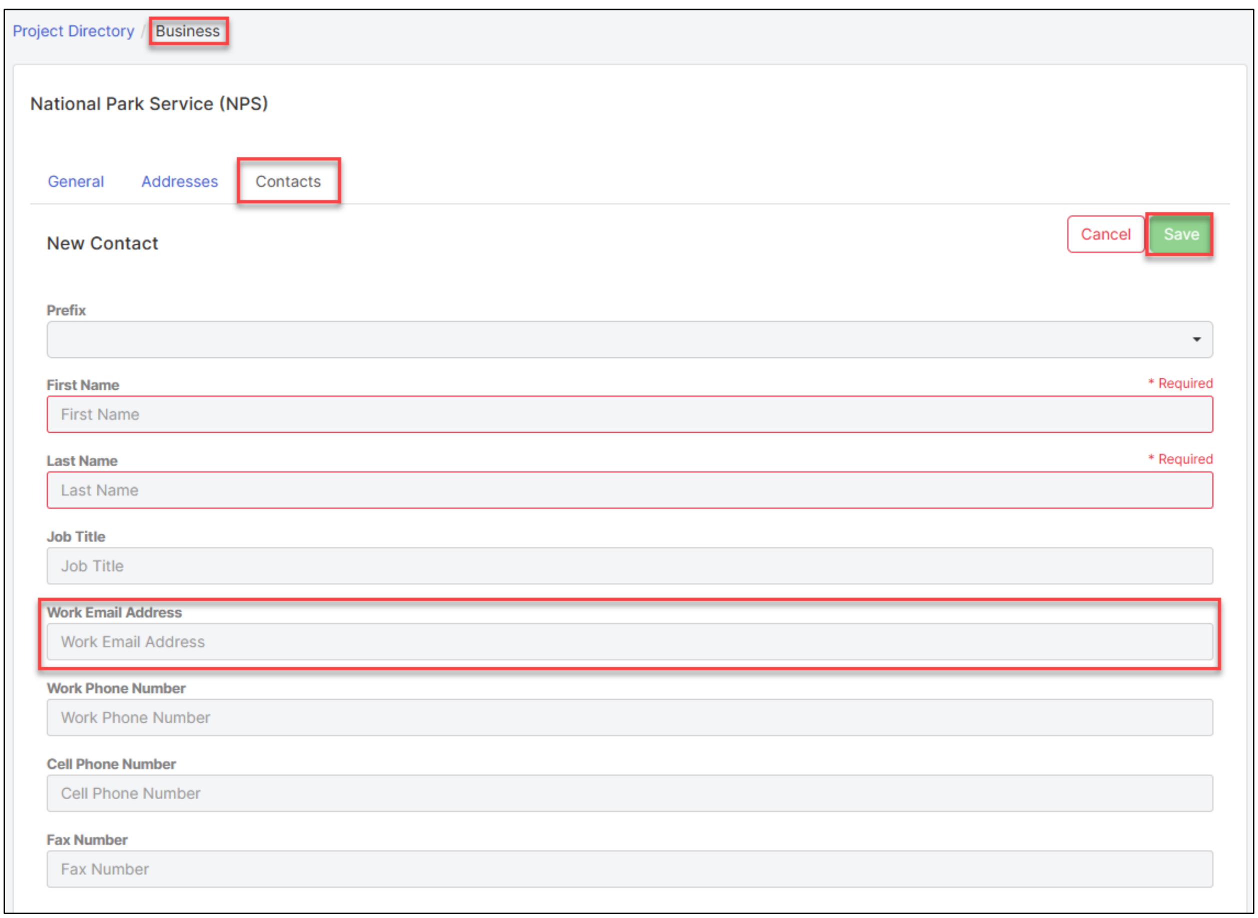
3. Select a **Business Name** to add one or more team members and click the **Add Existing** button.



4. Check the box beside each name to add to the Project Directory and click the **Add Existing** button to open the *Add contact to project* window.



5. If the person's name isn't listed in the *Add contacts to project* window, click **Create New** at the top of the *Add contacts to project* window to open the **Contacts** tab of the Business's record.
    a. Enter the contact's information.
        i. **First Name** and **Last Name** are required fields.
        ii. The **Work Email Address** must be entered if the user will be invited to the project.
    b. Click **Save**.

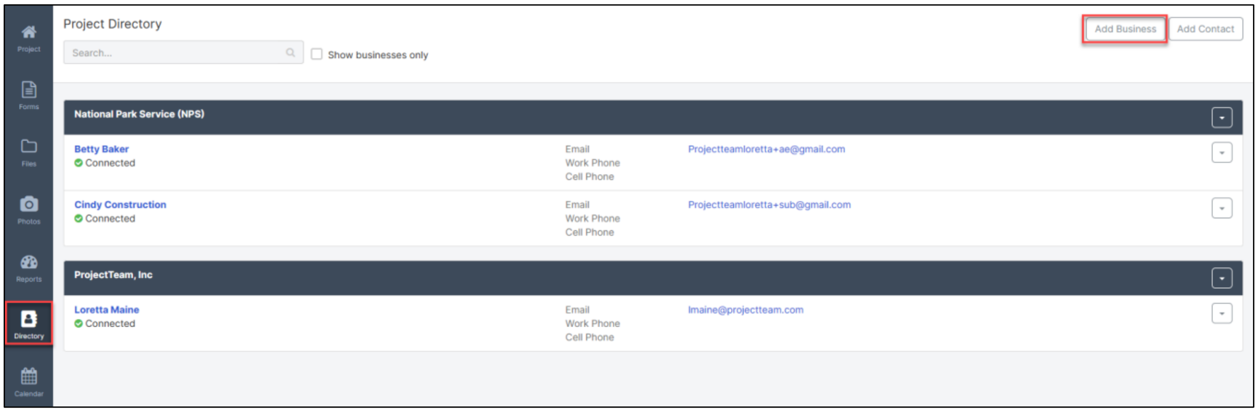


support@projectteam.com
(703) 961-1007

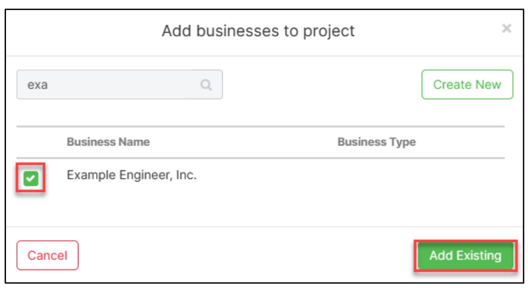
Add Business or Create New Business

When adding a Contact, if the Business Name does not appear in the list of existing businesses, you must first add the Business and then you can add the Contact.

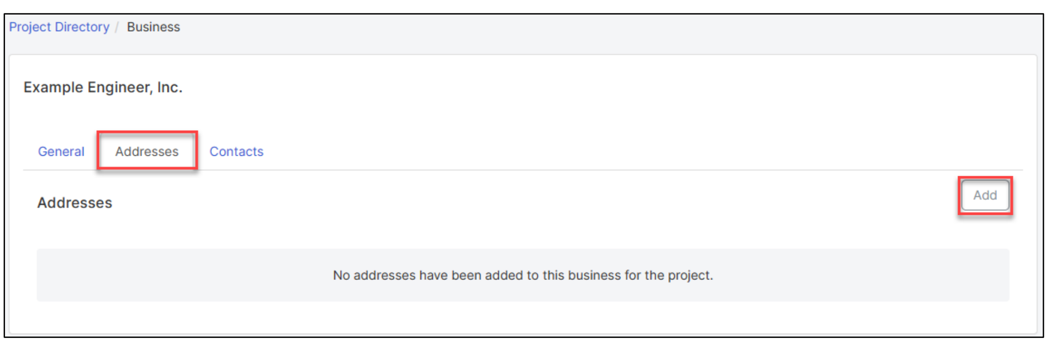
6. From the Project Directory log, click the **Add Business** button.



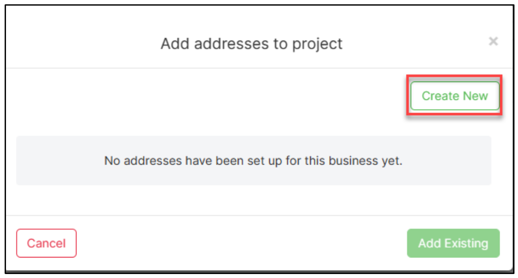
7. Use the **Search** box to find and add an existing business.



8. If the company isn't available, click on **Create New**.
   a. In the **New Business** page, enter the business's information.
      i. **Business Name** is the only required field.
   b. Click **Save**.
   c. Once a new business is saved, you should add the business address.
      i. Click on the **Addresses** tab of the Business contact and click **Add**.



d. Click **Create New** in the *Add addresses to project* window.

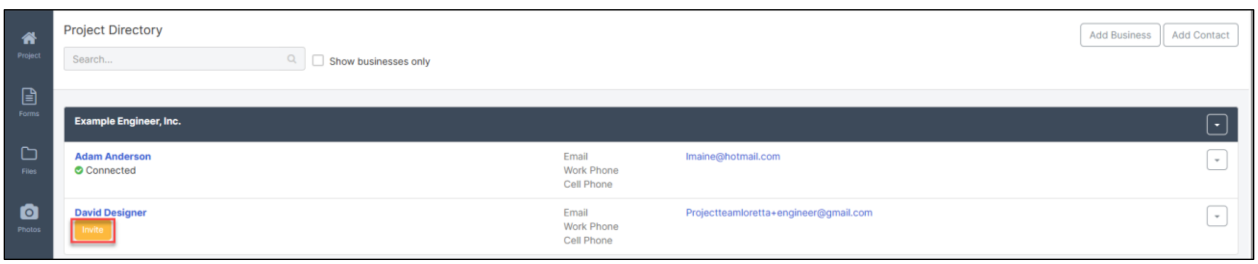


e. Fill out the complete **address** information.
f. Click **Save**.
g. *See:* Add Existing Contacts or Create a New Contact – Step 5, above.

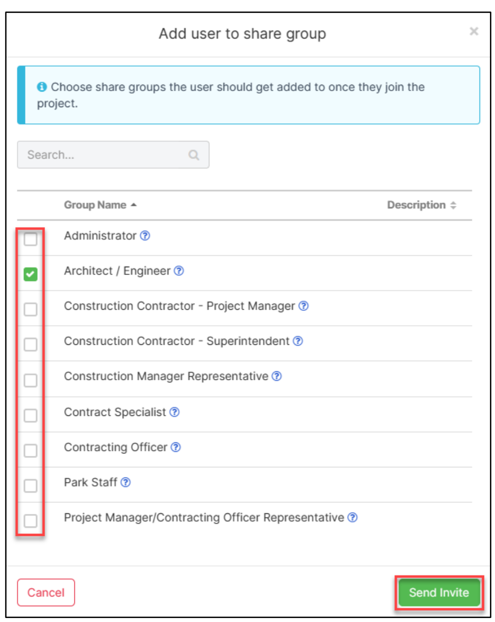
Invite a Contact to the Project

After Contacts are added to your Project Directory, they can be Invited to contribute to the project in ProjectTeam and assigned to one or more Share Groups.

1. Click the **Invite** button below the Contact's name in the Project Directory log:



2. Select the Share Group(s) for the Contact and click **Send Invite**.



support@projectteam.com
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Related Resources

- Help Center Link: Project Directory Overview (projectteam.com)
- Workflow QRG
- Workflow Video

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