

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.

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

[Add Existing Contacts or Create a New Contact](#)

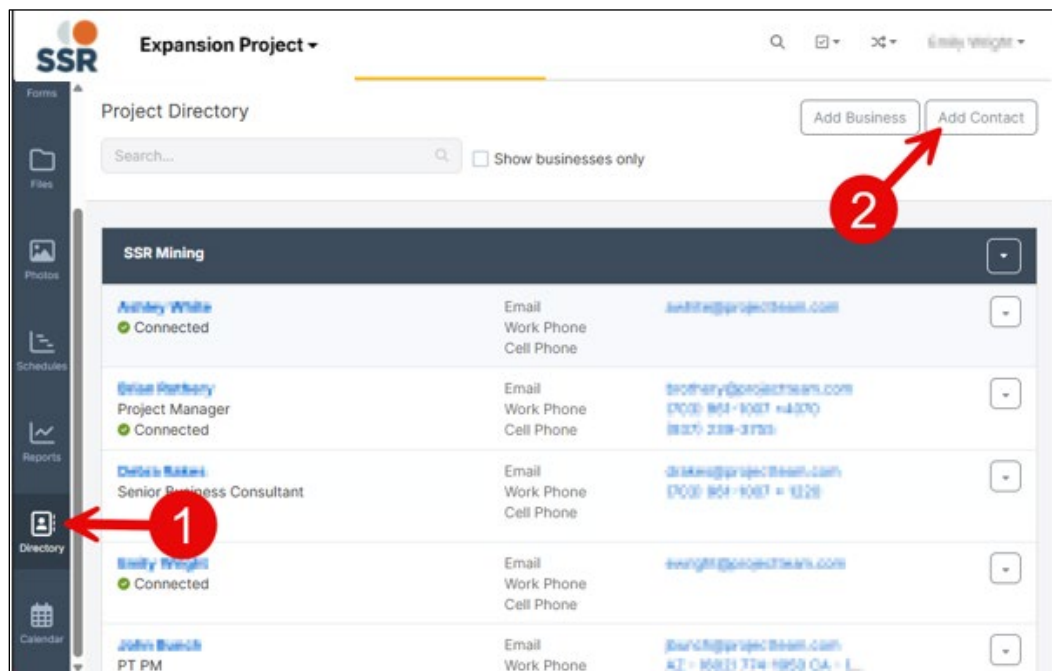
[Add Business or Create New Business](#)

[Invite a Contact to the Project](#)

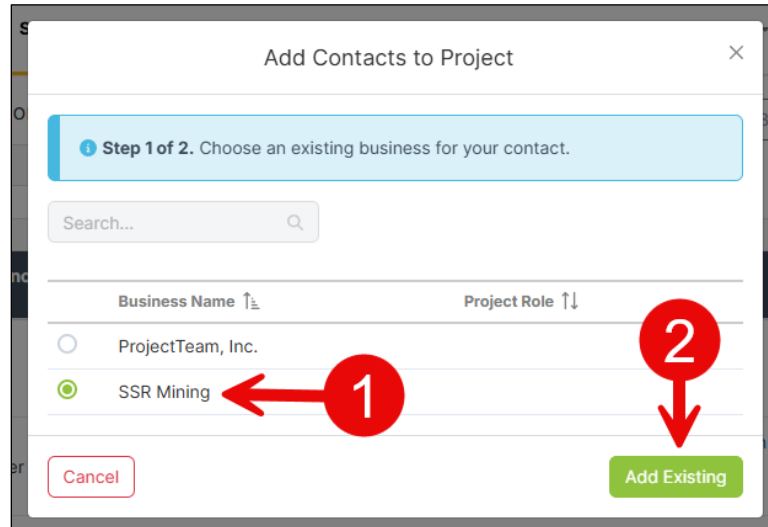
[Related Resources](#)

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) **Using search** locate the related company name. Select the **business** by clicking the circle to the left of the company's name. Click the **Add Existing** button.



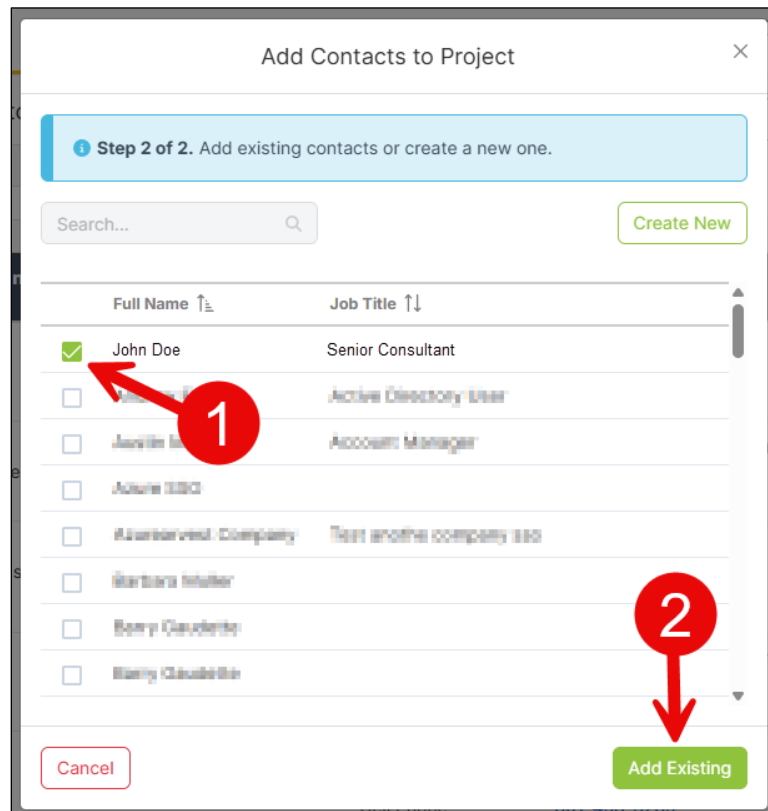
Step 1 of 2. Choose an existing business for your contact.

Search...

Business Name ↑↓	Project Role ↑↓
☐ ProjectTeam, Inc.	
☒ SSR Mining	

Cancel Add Existing

- 4) Check the box beside each name linked to the previously selected company. Click the **Add Existing** button to open the *Add Contacts to Project* window.



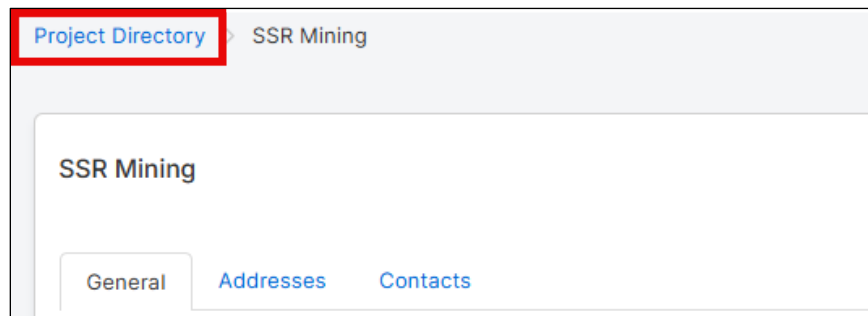
Step 2 of 2. Add existing contacts or create a new one.

Search... Create New

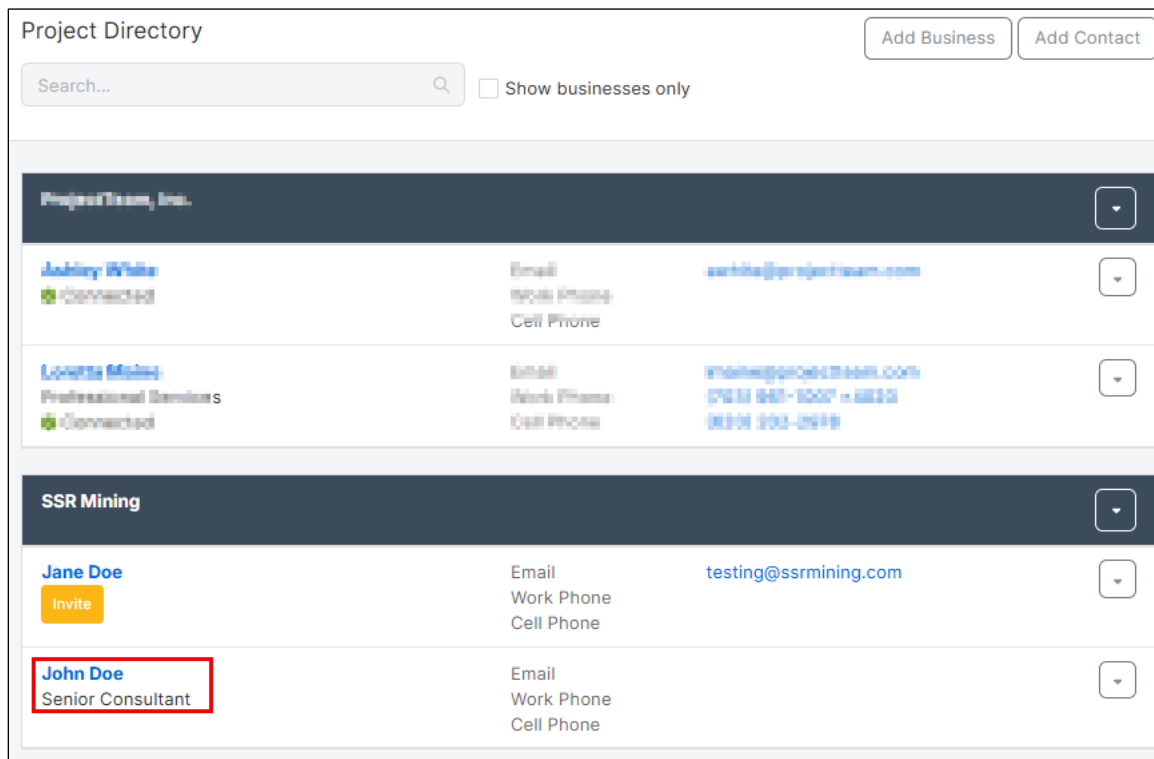
Full Name ↑↓	Job Title ↑↓
☒ John Doe	Senior Consultant
☐ Active Directory User	Active Directory User
☐ Account Manager	Account Manager
☐ Active User	
☐ Unverified Company	Test another company id
☐ Barbara Muller	
☐ Barry Claudeite	
☐ Barry Claudeite	

Cancel Add Existing

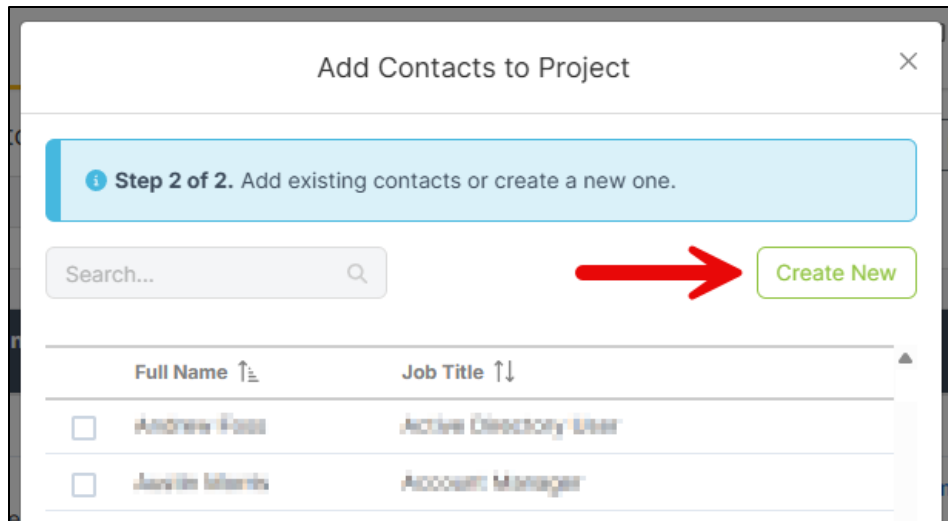
- 5) Click on Project Directory on the top left to return to the main directory page.



- 6) The contact's name will be listed in the **Project Directory** under their company's name.



- 7) If a user's name is not listed, click **Create New** at the top of the *Add Contacts to Project* window to open the **Contacts** tab of the company's record.



Add Contacts to Project

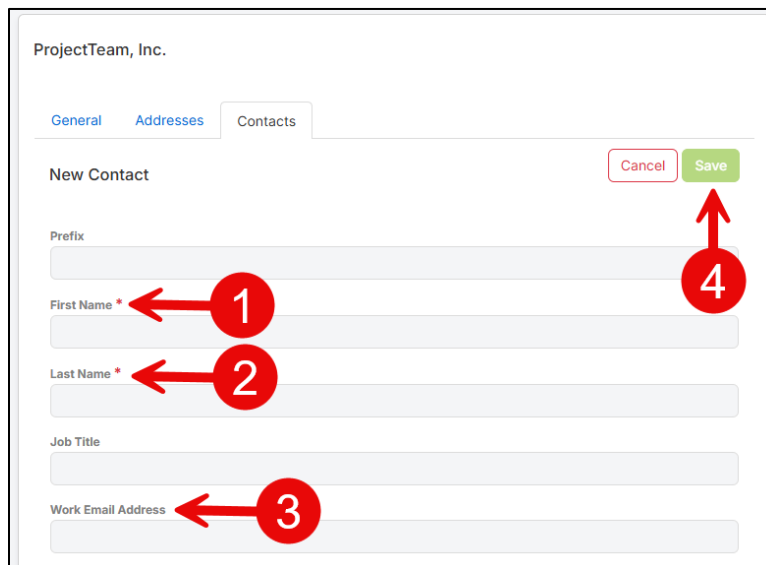
Step 2 of 2. Add existing contacts or create a new one.

Search...

Create New

	Full Name ↑↓	Job Title ↑↓
☐	Andrew Foss	Active Directory User
☐	Jessie Martin	Account Manager

- a. Begin entering the contact's information.
 - i. The **first** and **last name** fields are required.
 - ii. A work email address should also be entered to invite new users to the project.
- b. Click **Save**.



ProjectTeam, Inc.

General Addresses Contacts

New Contact

Cancel Save

Prefix

First Name *

Last Name *

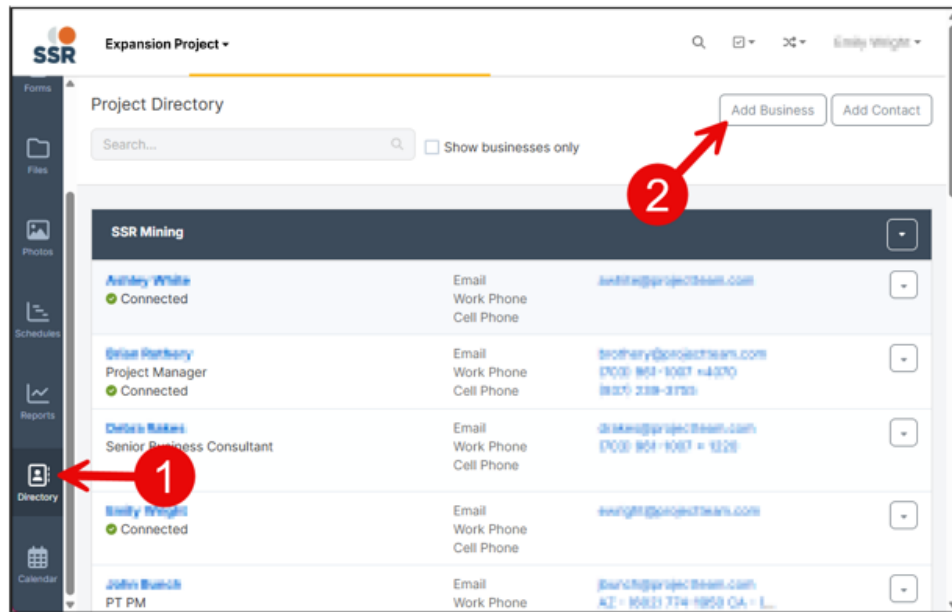
Job Title

Work Email Address

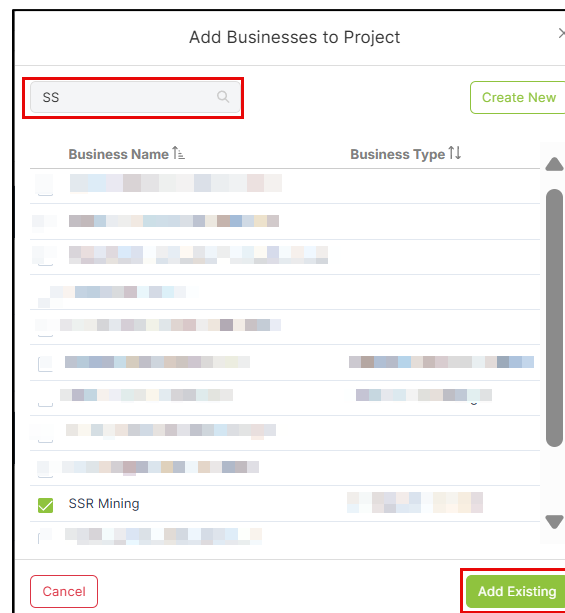
ADD BUSINESS OR CREATE NEW BUSINESS

When adding a business, if the company name does not appear in the list of existing businesses, you must first add the company to the directory and then add the contact.

- 1) From the Project Directory main page, click the **Add Business** button.



- 2) Use the **Search** feature to locate an existing business. Select the company's name, then click **Add Existing** to add the company to the Project Directory.

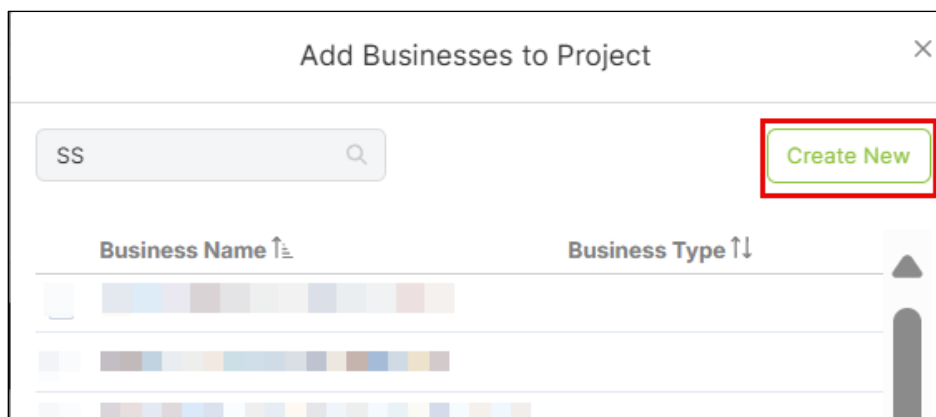


- 3) The company's name will appear in the Project Directory without any contacts. Click **Add Contacts** and repeat the steps in the Add Existing Contacts or Create new Contact section.

See: [Add Existing Contacts or Create a New Contact](#)



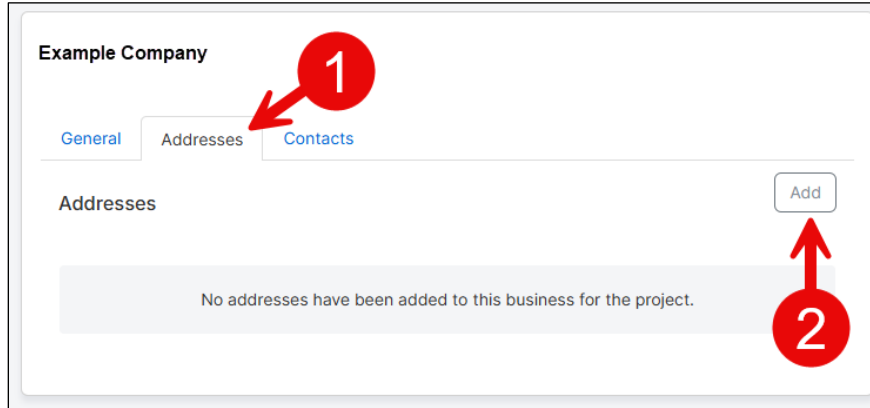
- 4) If the company name is not available, click on **Create New**.



- a. In the **New Business** page, enter the company'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 company profile and click **Add**



Example Company

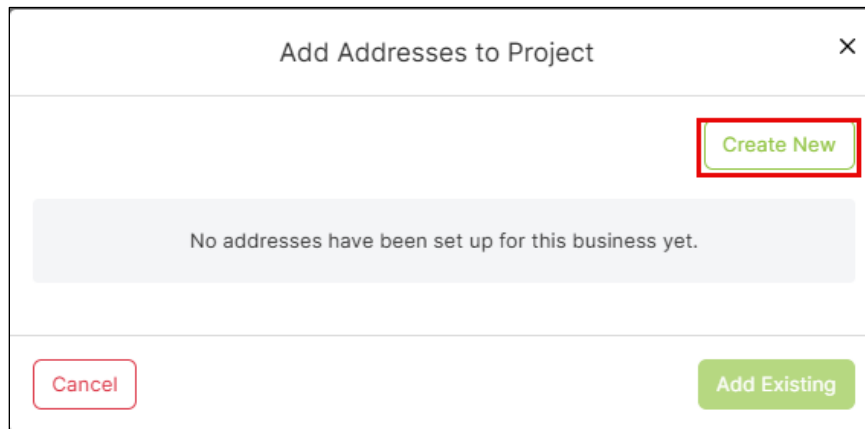
General Addresses Contacts

Addresses

Add

No addresses have been added to this business for the project.

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



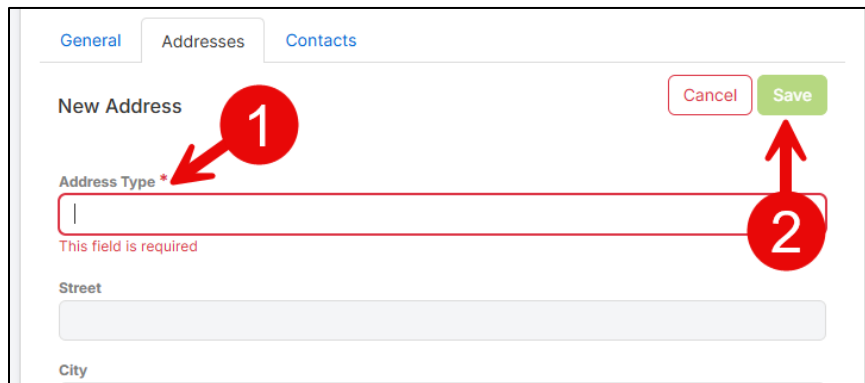
Add Addresses to Project

Create New

No addresses have been set up for this business yet.

Cancel Add Existing

- e. Fill out the complete **address** information. Click **Save**.



General Addresses Contacts

New Address

Cancel Save

Address Type *

This field is required

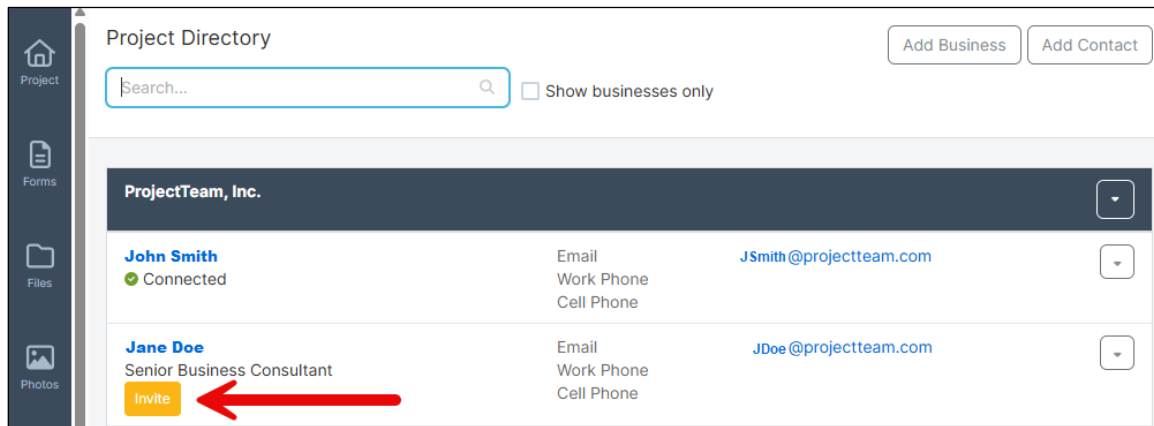
Street

City

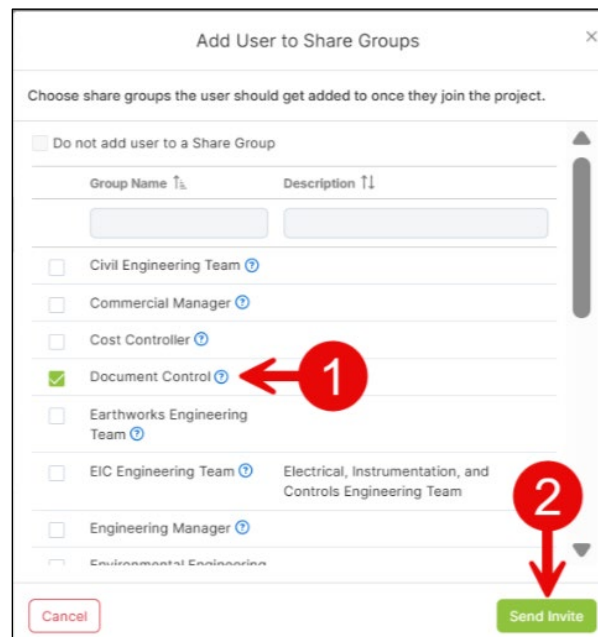
INVITE A CONTACT TO THE PROJECT

After contacts are added to the Project Directory, they can be invited to the project and assigned to one or more share groups.

- 1) Click the **invite** button below the contact's name in the Project Directory.



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



RELATED RESOURCES

- Help Pages
[Project Directory Overview \(projectteam.com\)](https://projectteam.com/project-directory-overview)