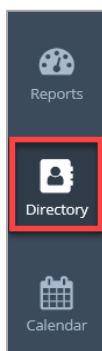


Project Directory

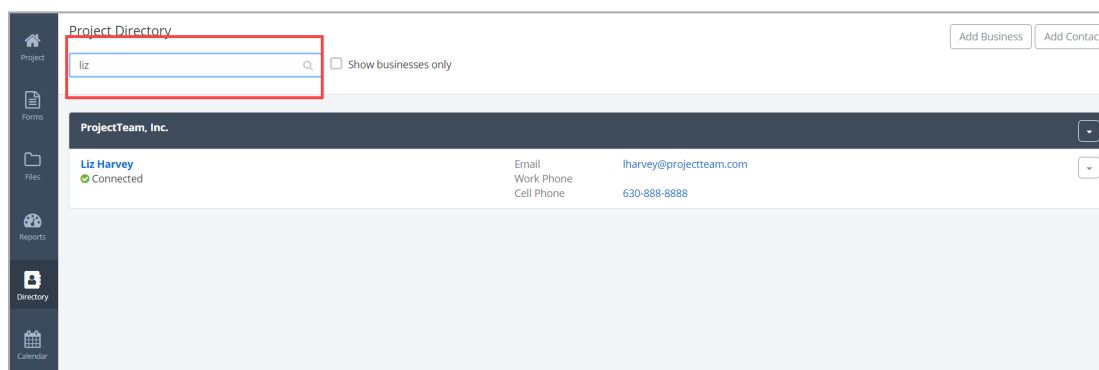
The Project Directory is the place where all business and contact information for your project can be stored.

Add Existing Contacts to Your Directory

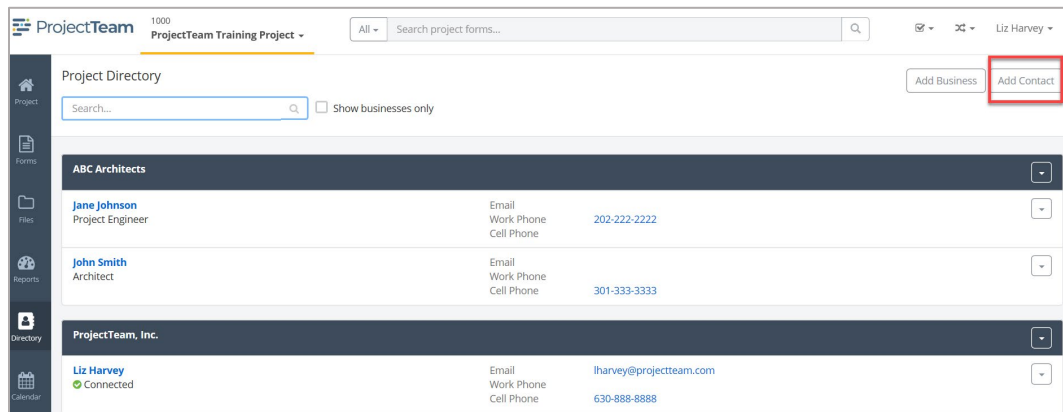
1. Navigate to the **Directory** icon on the left navigation pane.



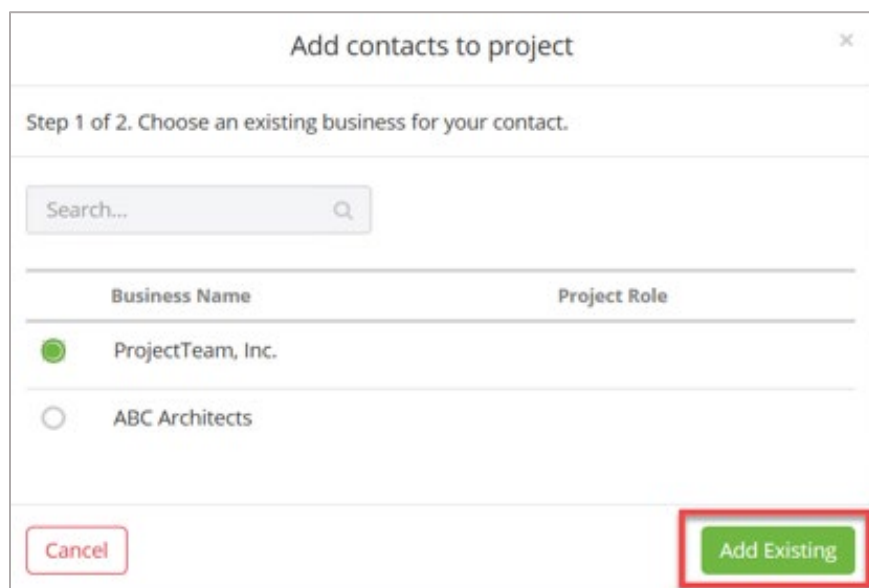
2. A list displays, which is unique per company and shows all businesses and contacts that your company has decided to keep track of.
3. At the top of the Project Directory, you will see a search bar allowing to quickly search for a contact. This displays the contacts information.



4. To add a member, in the upper right corner, click the **Add Contact** button.



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



6. Use the search field to find the team member(s) or scroll through the list. Click the **checkbox** beside each name and click the **Add Existing** button.

Add contacts to project

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

Search...

Create New

<input type="checkbox"/>	Bradley Witmer	
<input checked="" type="checkbox"/>	Brian Rothery	
<input type="checkbox"/>	Craig Hansen	
<input type="checkbox"/>	Dave Reed	Sr. Software Engineer
<input checked="" type="checkbox"/>	Debra Rakes	Support Specialist
<input type="checkbox"/>	Heidi Clark	
<input type="checkbox"/>	Jason Skeen	Application Architect
<input type="checkbox"/>	John Brown	Senior Architectural Engineer, PMP

Cancel Add Existing

Create or Add New Businesses

1. While in Project Directory, click the **Add Business** button.

ProjectTeam 1000 ProjectTeam Training Project

All Search project forms...

Project Directory

Search... Show businesses only

Add Business Add Contact

ABC Architects		
Jane Johnson Project Engineer	Email Work Phone Cell Phone	202-222-2222
John Smith Architect	Email Work Phone Cell Phone	301-333-3333
ProjectTeam, Inc.		
Debra Rakes Support Specialist	Email Work Phone Cell Phone	drakes@projectteam.com (703) 961-1007 (703) 961-1007

2. Use the **Search** box to find an existing company or click the **Create New** button to add a new company.

Business Name	Business Type
<input type="checkbox"/> 0812 Building Solutions Inc.	
<input type="checkbox"/> 212 Renovations Group	General Contractor
<input type="checkbox"/> AECOM	
<input type="checkbox"/> AES Northeast, PLLC	
<input type="checkbox"/> Alpha Corporation	Construction Manager
<input type="checkbox"/> American Bridge	
<input type="checkbox"/> Americom	Construction

3. In the **New Business** page, fill out the appropriate information and click the **Save** button.

ProjectTeam 1000 ProjectTeam Training Project

Project Directory / New Business

New Business

Business Name: XYZ Construction Company

Business Type: General Contractor

Company Website: Company Website

Headquarters Location: Headquarters Location

Description: Description

Project Role

4. Once a new business is saved, you should add the business address. Click on the **Addresses** tab of the business contact and click **Add**.

Project Directory / Business

ABC Architects

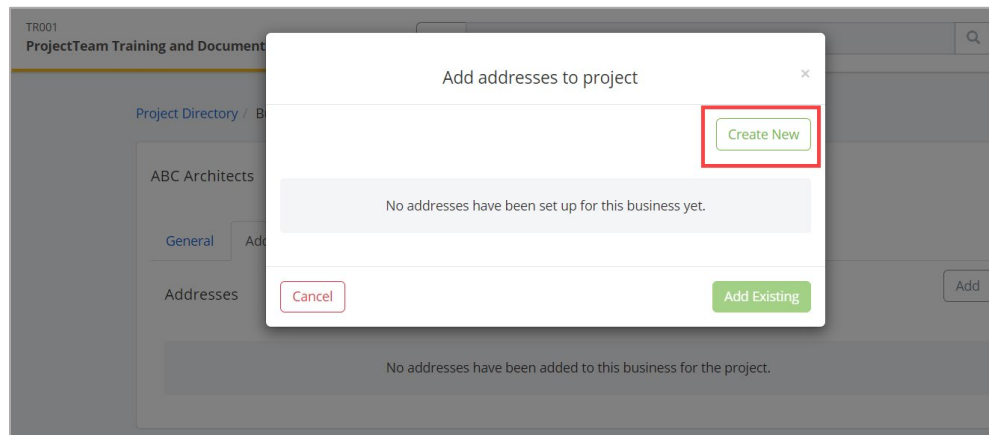
General Addresses Contacts

Addresses

Add

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

5. To set a new address, click on **Create New**.



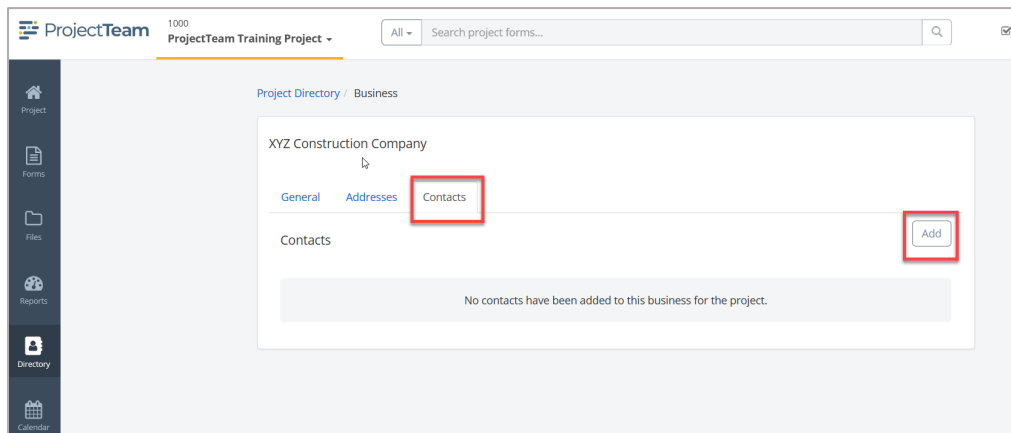
6. Fill out the complete **address** information. Click **Save**. Doing so allows this companies address to populate in within a form.

A screenshot of the 'ABC Architects' address form. The form is titled 'ABC Architects' and has tabs for 'General', 'Addresses', and 'Contacts'. The 'Addresses' tab is active. At the top right of the form, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red rectangle. The form fields are: 'Address Type' (with a red border and a '* Required' label), 'Street', 'City', 'State/Province', 'Zip/PostalCode', 'Country', and 'Notes'. Each field has a placeholder text matching its label.

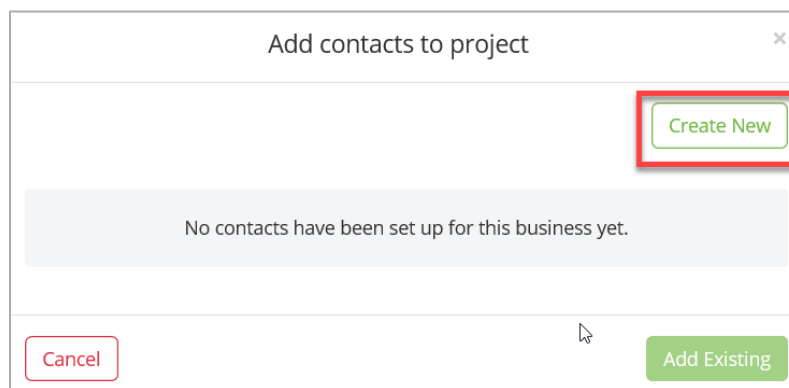
Create New Contacts

After creating a new business, you can add contacts.

1. From within the Project Directory Business page, click the **Contacts** tab and click the **Add** button.



2. Next, click **Create New**.



3. On the Contacts tab, fill out the appropriate information and click the **Save** button.

A screenshot of the 'New Contact' form within the ProjectTeam application. The form is located under the 'Contacts' tab for 'XYZ Construction Company'. It includes a 'Prefix' dropdown menu and several input fields: 'First Name' (marked as required), 'Last Name' (marked as required), 'Job Title', 'Work Email Address', and 'Work Phone Number'. A red box highlights the 'First Name' and 'Last Name' fields. At the top right of the form are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

Invite a Contact to the Project

1. After adding a company and contact to the directory, press the **Invite** button below the contact's name:

ProjectTeam, Inc.			
Brian Rothery Connected	Email Work Phone Cell Phone	brothery@projectteam.com (703) 961-1007	
Debra Rakes Support Specialist Connected	Email Work Phone Cell Phone	drakes@projectteam.com (703) 961-1007 (703) 961-1007	
Josh Witmer Product Manager Connected	Email Work Phone Cell Phone	jwitmer@projectteam.com (703) 961-1007 (703) 200-2130	
Liz Harvey Connected	Email Work Phone Cell Phone	lharvey@projectteam.com 630-888-8888	
Steve Van Dyke Connected	Email Work Phone Cell Phone	svandyke@projectteam.com	
Susan Mills Connected	Email Work Phone Cell Phone	smills@projectteam.com	
Ty Witmer President Connected	Email Work Phone Cell Phone	twitmer@projectteam.com (703) 961-1007 X1040 (703) 868-7417	
Wayne Frias Project Manager Connected	Email Work Phone Cell Phone	wfrias@projectteam.com 703-961-1007 Option 5	
Smith Construction			
Sally Smith Owner	Email Work Phone Cell Phone	ssmith@cloud.com	