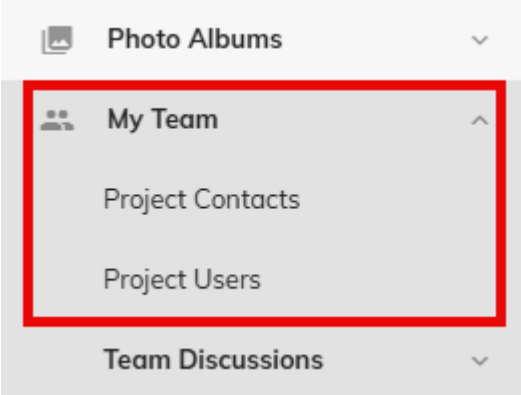
1. What is the Project Users and Project Contacts Feature?

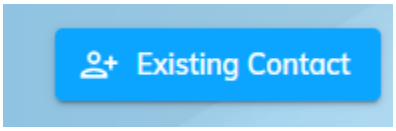
The My Team directory is a dynamic list of contact information for all of the project team members and contacts associated with your project.

- The Project Users area displays the contact information of fellow users in your project.
- The Project Contacts area displays the contact information of project contacts, i.e., individuals or companies who are important to the project, but are not necessarily users.
- Project users and important contacts are listed in this searchable and filterable area.
- Contacts can be copied into multiple projects and shared.
- Users can quickly download virtual business cards to import them into Outlook.
- Changes made by project team members on their user profile will automatically update their My Team directory.

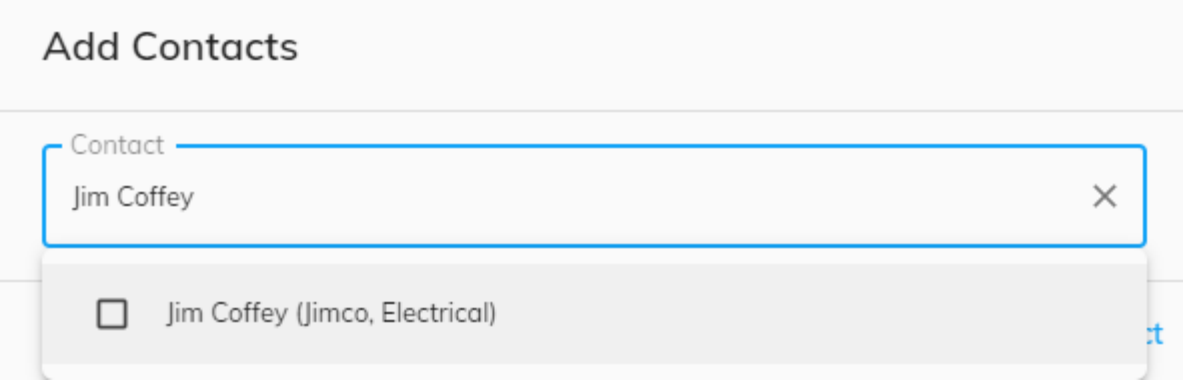


A project's My Team directory can be accessed by navigating to the project through the My Projects page. Once inside of a project, the My Team can be found on the left-side menu by clicking **My Team,** then clicking **Project Contacts** or **Project Users** depending on which individual's contact information you want to find.

2. Adding a Contact to a Project



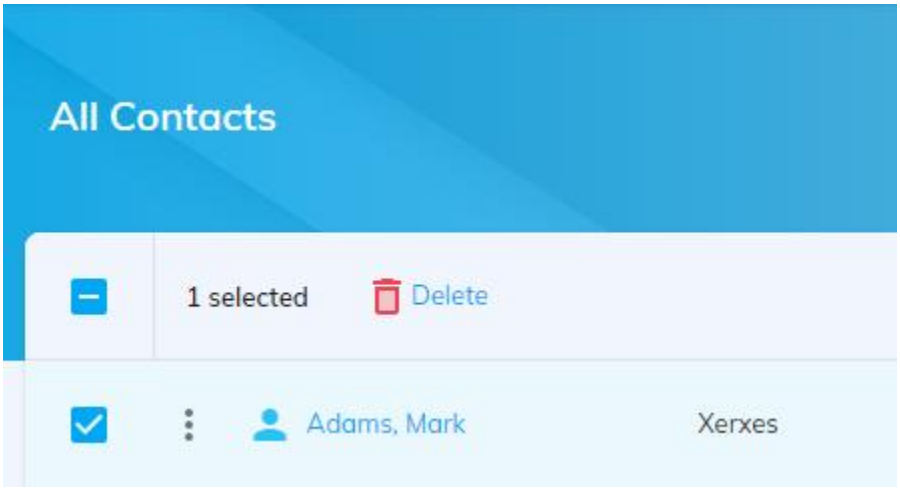
If a contact from another project you are in is not present in the current project you are in, and you believe it would benefit the team to include them, then the contact can be added using the **Existing Contact** button while inside of the **Project Contacts** page.



Search by the contact's first, last, or company name. Check the box next to the contact(s) you wish to add (several can be added at once), then click **Add To Project**. This contact will now be visible to other users when accessing the Project Contacts area of this project.

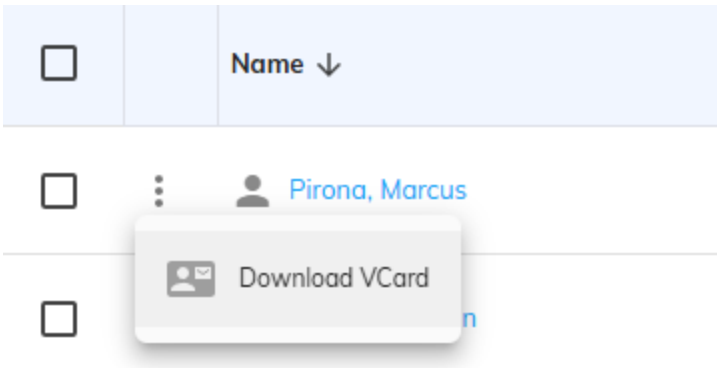
3. Removing a Contact from a Project

If you have the access to do so and want to remove a contact from displaying in a project, then check the box next to the contact's name and click **Delete**. Click **Yes** in the following pop-up window to confirm your action.



4. Downloading a Contact Card

A VCF file of a contact or user can be generated to import into your email software, such as Microsoft Outlook. In the Project Contacts or Project Users area, click the **Triple Dots icon** next to an individual, then click the **Download VCard** button. This will download a VCF file of the team member to your computer that can be imported into a separate software.



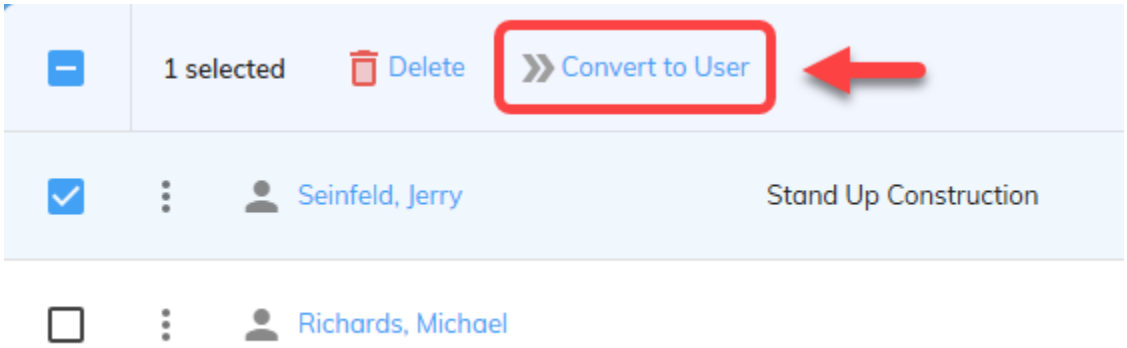
5. Converting a Contact to a User

Converting a contact to a user is a quick and efficient way to ensure that the individual can take responsibility for project items they are linked to, such as tasks or contract awards. This is especially helpful if the contact already has items assigned to them, as it eliminates the need to create a new user from scratch.

Note: Converting a contact to a user requires Projectmates Admin rights.

Steps to Convert a Contact to a User:

1. **Go to the Project:** Navigate to the project where the contact exists.
2. **Access Project Contacts:** In the project, go to **My Team > Project Contacts**.
3. **Select the Contact:** Find the contact you want to convert and check the box next to their name.
4. **Convert to User:** Click the **Convert to User** button.



Once the contact is converted, they will have access to the project in which they were converted. The admin can then adjust their role as they will most likely be in a **Temp Role**. With appropriate rights, they can view items linked to them, allowing them to manage and take responsibility for those tasks.