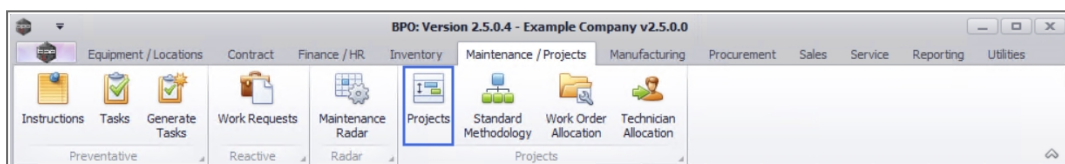


PROJECTS

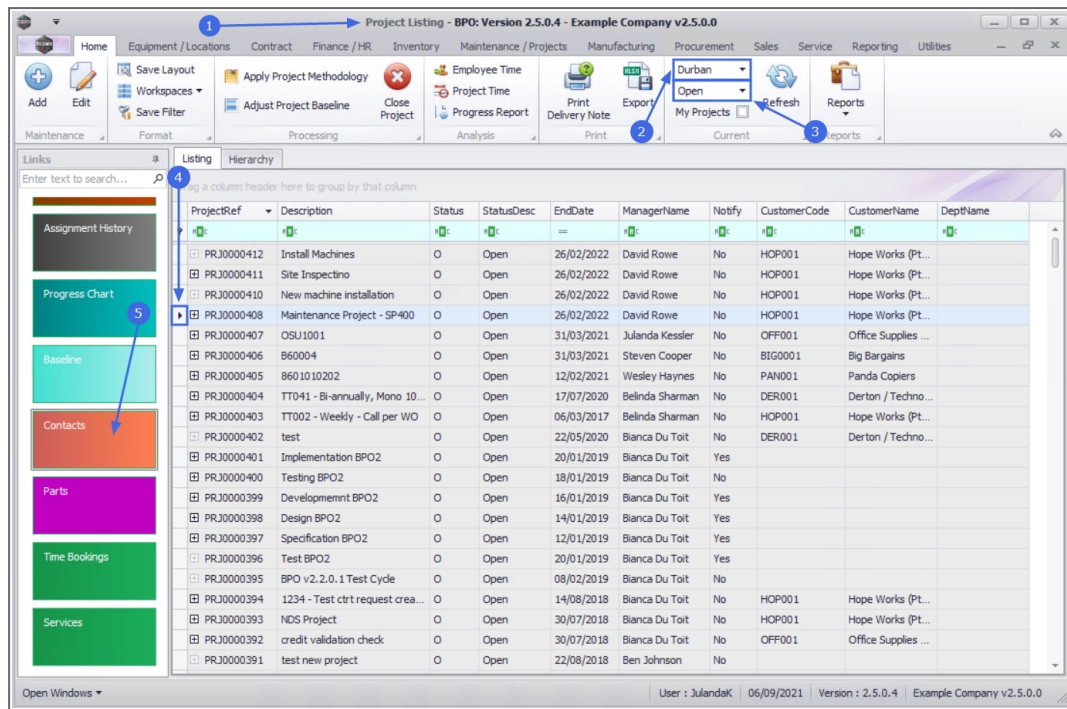
PROJECTS - CONTACTS

The Contacts tile allows you to set up a Project Contacts directory for the project which facilitates communication across the project team.

Ribbon Access: *Maintenance / Projects > Projects*



1. The **Project Listing** screen will be displayed.
2. Select the **Site** where the project can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the project.
 - The example has **Open** selected.
4. Click on the **row** of the project you wish to create a project contact for.
5. Click on the **Contacts** tile.



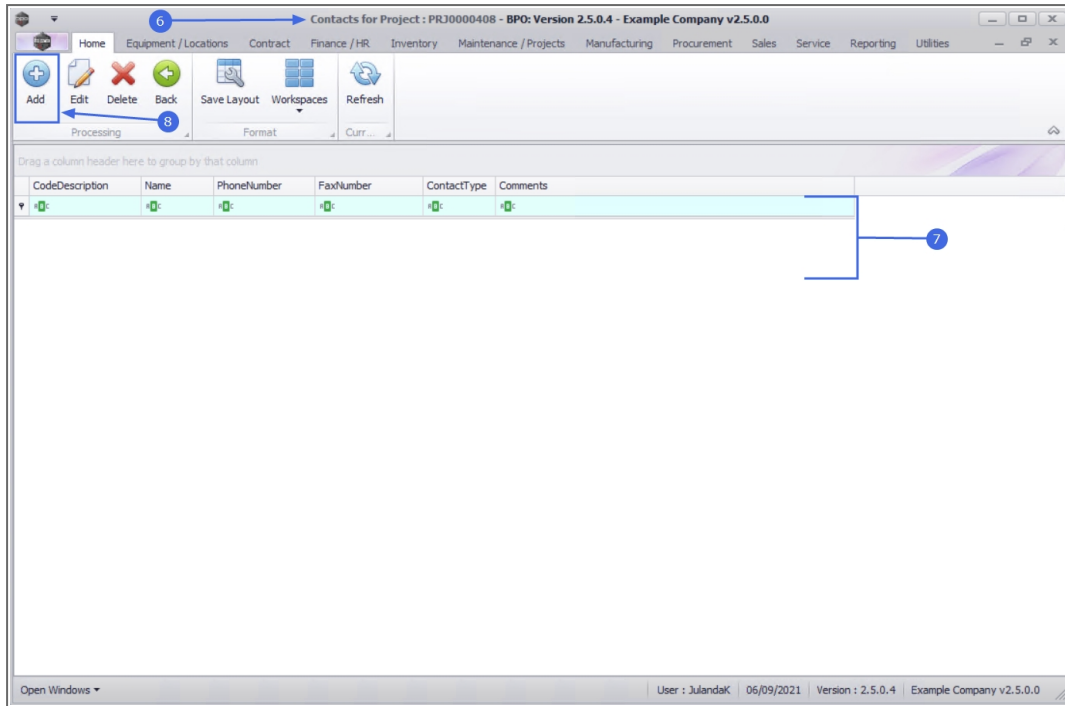
6. The **Contacts for Project : [project ref number]** screen will be displayed.
7. Any contacts that have already been created on the project contact list will display in the contact list frame.

ADD CONTACT

8. Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



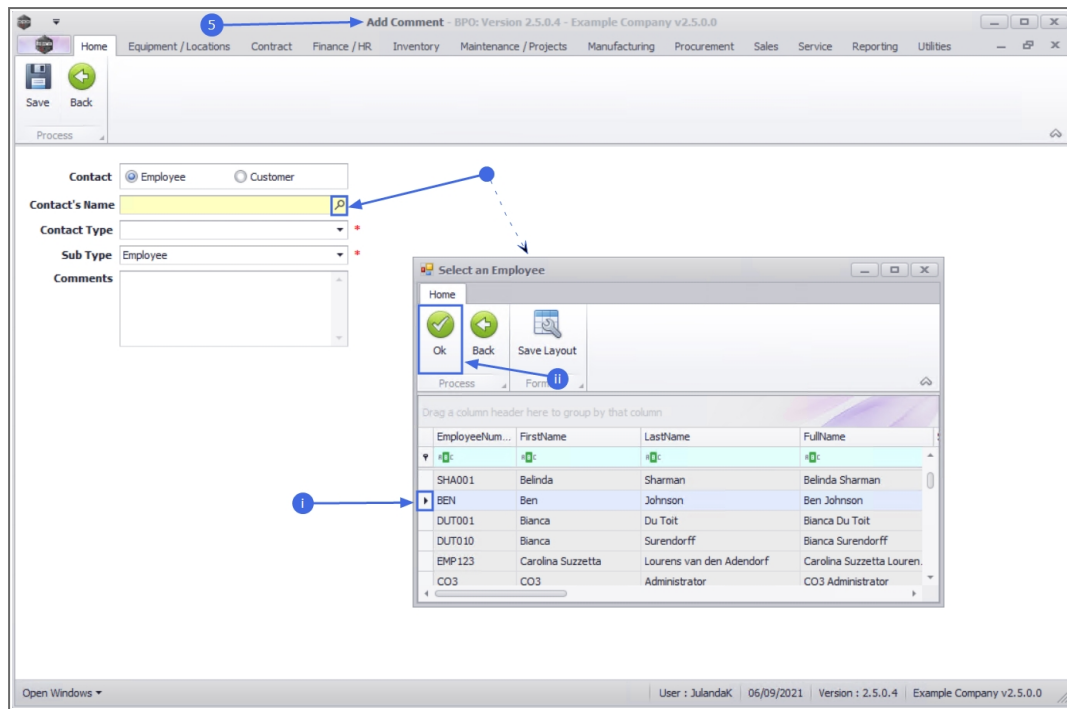
9. The **Add Comment** screen will be displayed.

- **Contact:** Select whether the contact for this project is an Employee or a Customer, by clicking on the relevant **radio button**.
- **Contact's Name:** Click on the **search button** to display the **Select an Employee** list.



Note that this screen will display as Select a Customer list if Customer was selected as the contact.

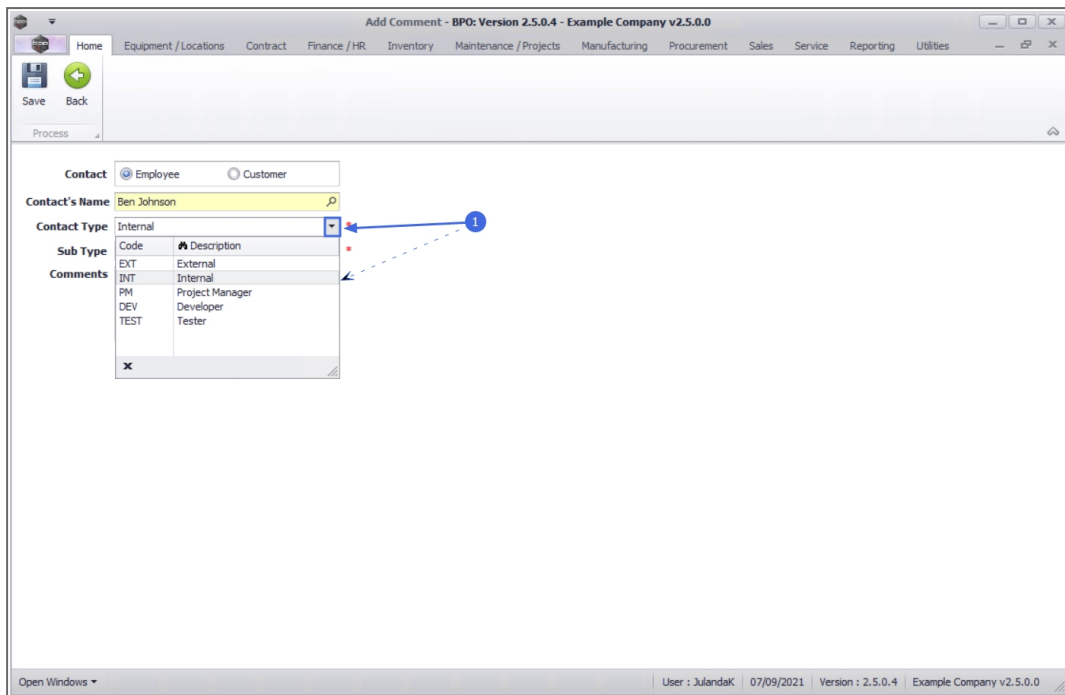
- Click on the **row** of the employee you wish to add to the project contact list.
- Click on **OK**.



- **Contact Type:** Click on the down **arrow** to select the contact type for the contact you are creating. For instance, you may choose to specify that this is an Internal or External contact if your project is a Global project.



Refer to [Static Data Contact Type](#) for more information on how to add a Contact Type to the list.



Add Comment - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

Contact ☒ Employee ☐ Customer

Contact's Name Ben Johnson

Contact Type Internal

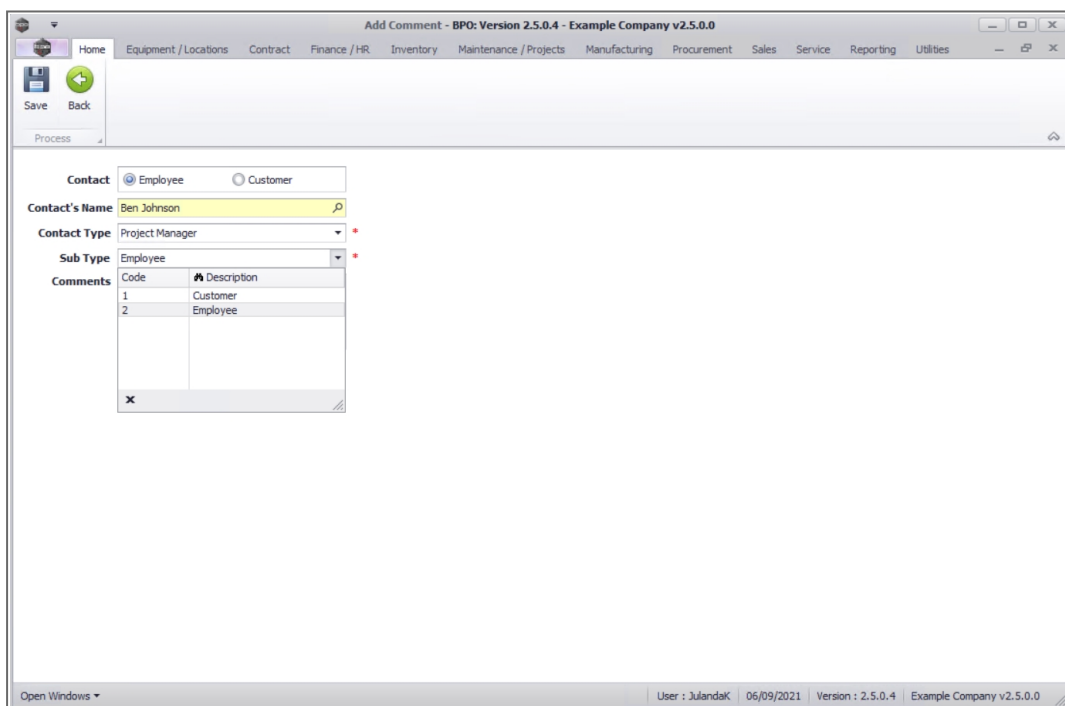
Sub Type

Code	Description
EXT	External
INT	Internal
PM	Project Manager
DEV	Developer
TEST	Tester

Comments

Open Windows User: JulandaK 07/09/2021 Version: 2.5.0.4 Example Company v2.5.0.0

- **Sub Type:** This field allows you to select the sub type or role for the contact, e.g. Project Manager, or you may wish to use this field to specify the department this contact reside in, e.g Finance or IT.



Add Comment - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

Contact ☒ Employee ☐ Customer

Contact's Name Ben Johnson

Contact Type Project Manager

Sub Type Employee

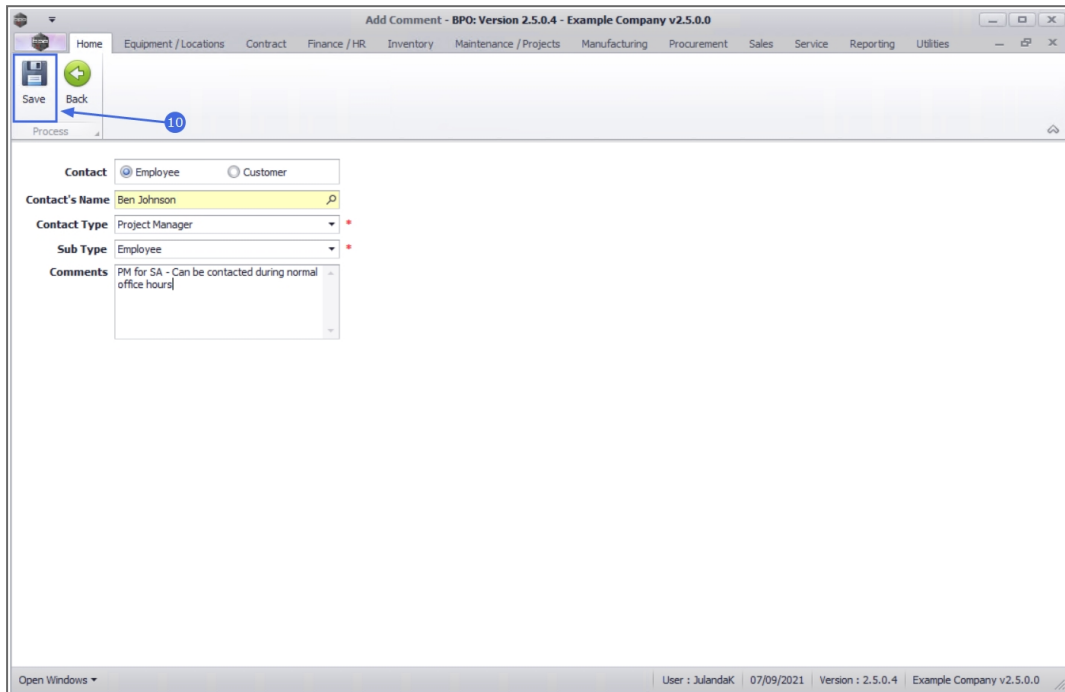
Code	Description
1	Customer
2	Employee

Comments

Open Windows User: JulandaK 06/09/2021 Version: 2.5.0.4 Example Company v2.5.0.0

- **Comments:** This field allows you to add any special comments or instructions related to this contact, for instance where time zones may be important.

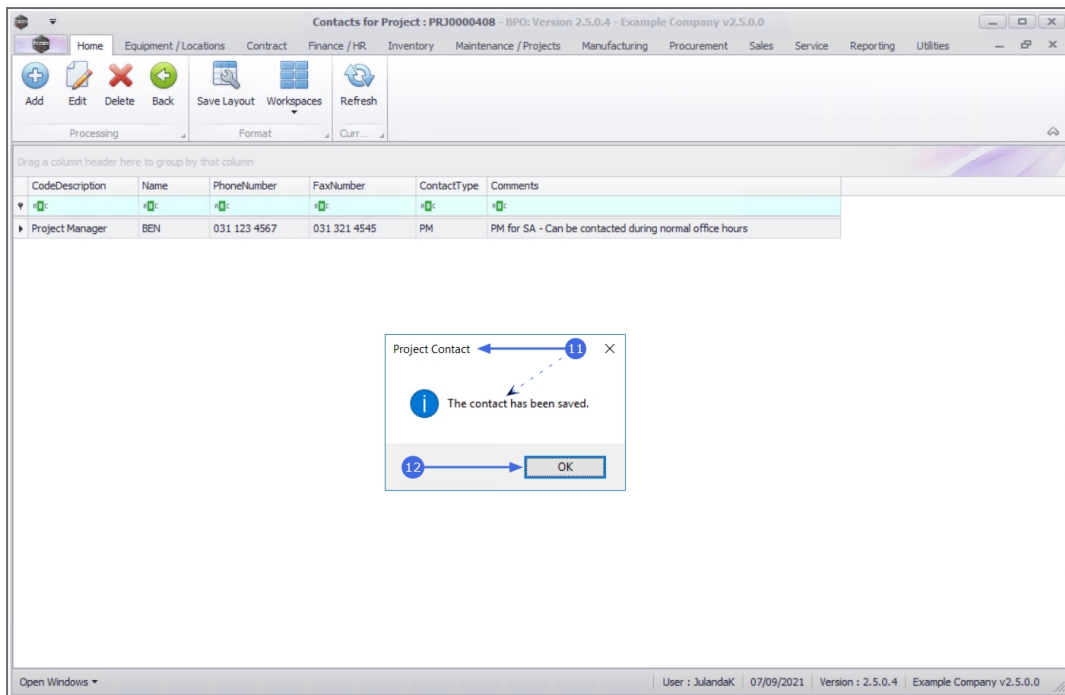
10. Click on **Save** to save the contact information.



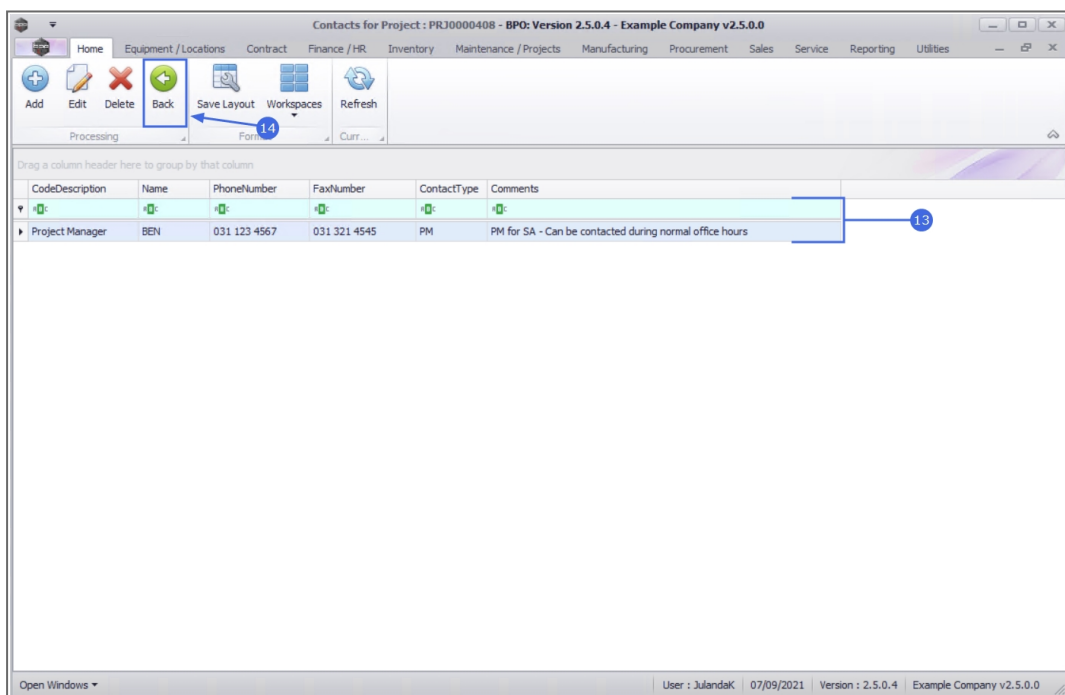
11. When you receive the **Project Contact** message informing you that;

- **The contact has been saved.**

12. Click on **OK**.



13. The **Contacts for Project** screen has been updated with the new Contact. Continue adding contacts for the Project as set out above.
14. Click on **Back** to return to the Project Listing screen.

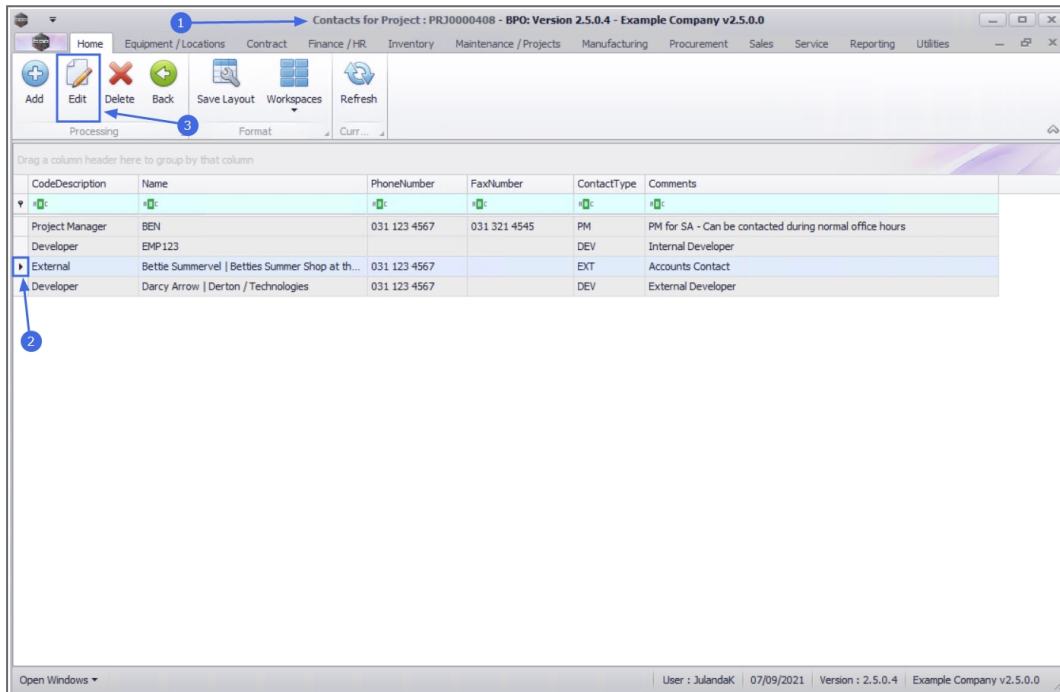


EDIT CONTACT

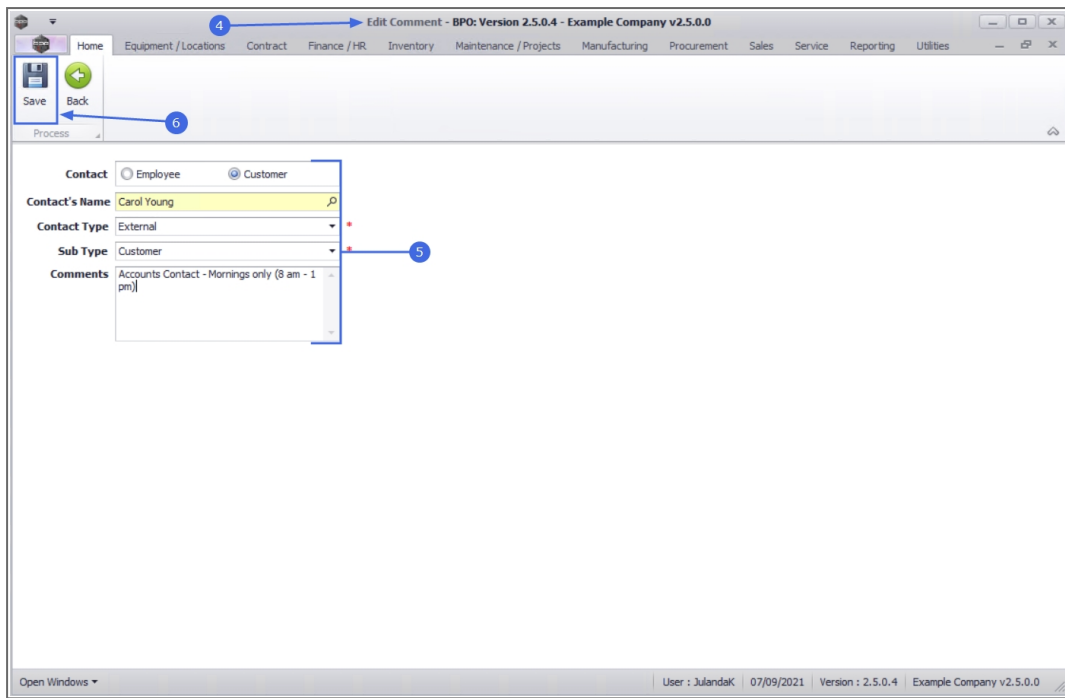
1. From the **Contacts for Project : [project ref number]** screen,
2. Click on the **row** of the contact you wish to modify.
3. Click on **Edit**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.



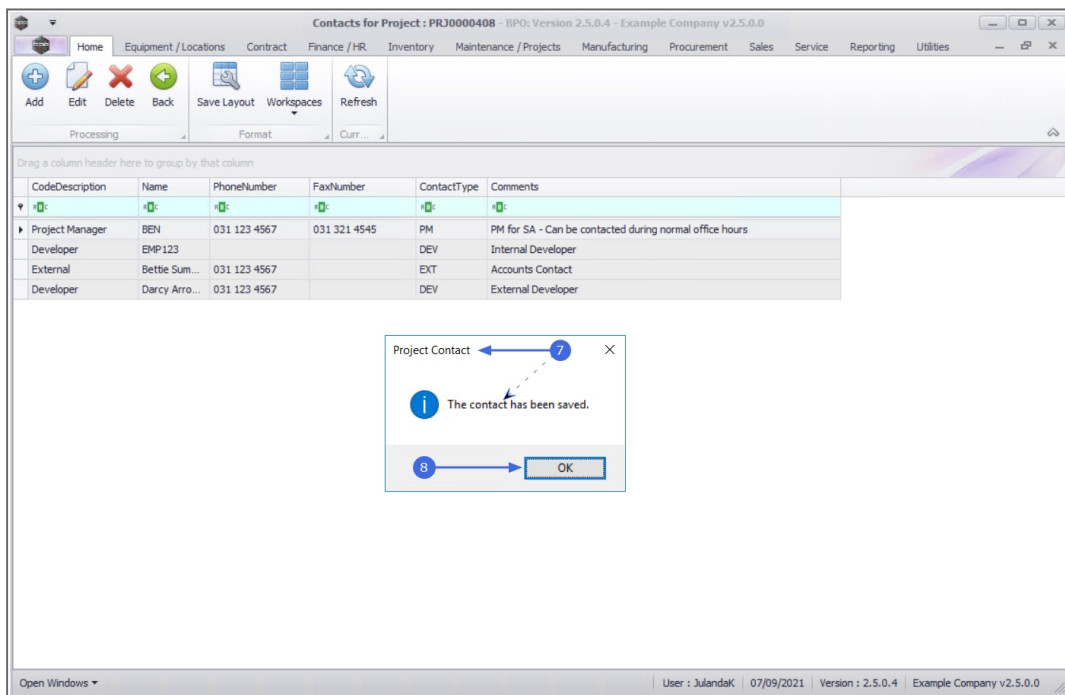
4. The **Edit Comment** screen will be displayed.
5. Make the necessary changes to the Contact information.
6. Click on **Save**.



7. When you receive the **Project Contact** message informing you that;

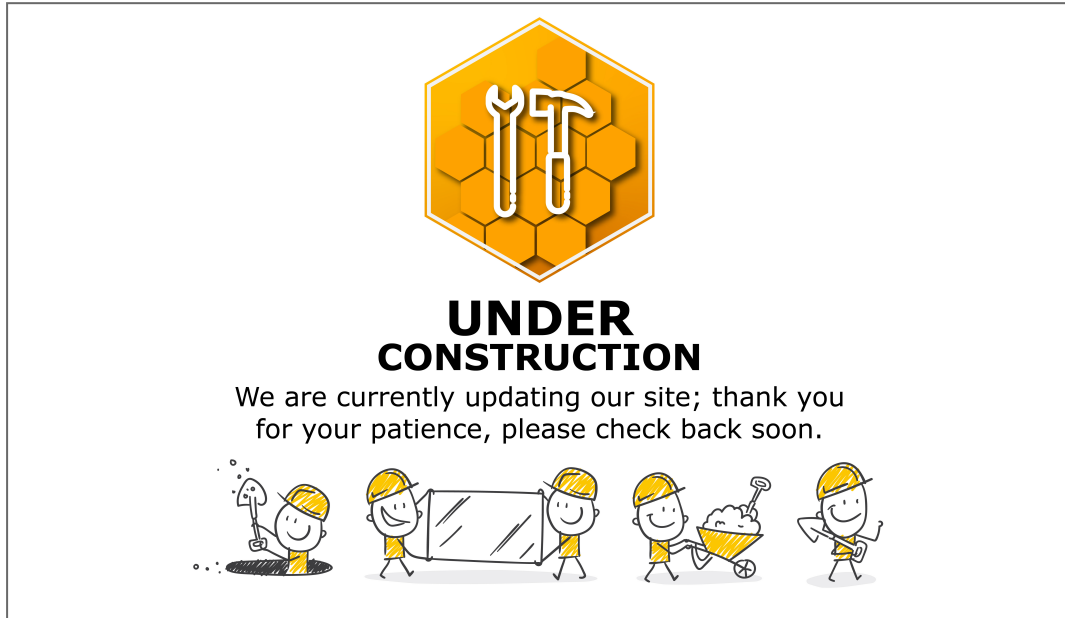
- **The contact has been saved.**

8. Click on **OK**.



CodeDescription	Name	PhoneNumber	FaxNumber	ContactType	Comments
Project Manager	BEN	031 123 4567	031 321 4545	PM	PM for SA - Can be contacted during normal office hours
Developer	EMP123			DEV	Internal Developer
External	Bettie Sum...	031 123 4567		EXT	Accounts Contact
Developer	Darcy Arro...	031 123 4567		DEV	External Developer

9. The Contacts for Project screen has been updated with the new Contact.
10. Click on **Refresh** to update the screen, if required.
11. Click on **Back** to return to the Project Listing screen.

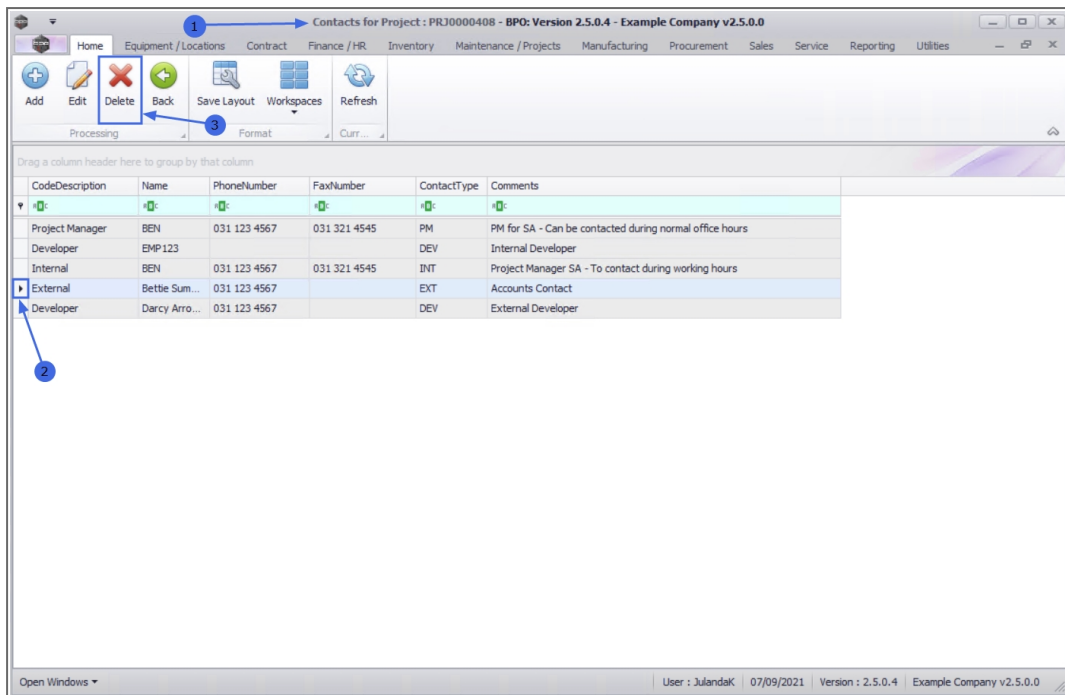


DELETE CONTACT

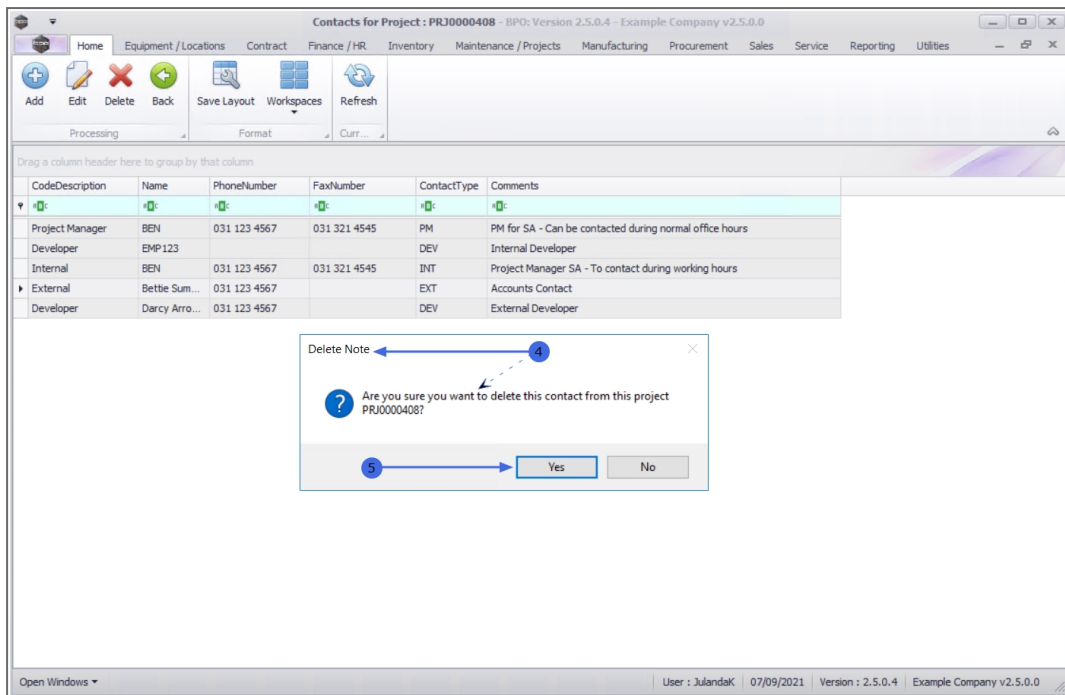
1. From the **Contacts for Project : PRJ**[project ref number] screen,
2. Click on the **row** of the project contact you wish to remove.
3. Click on **Delete**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.

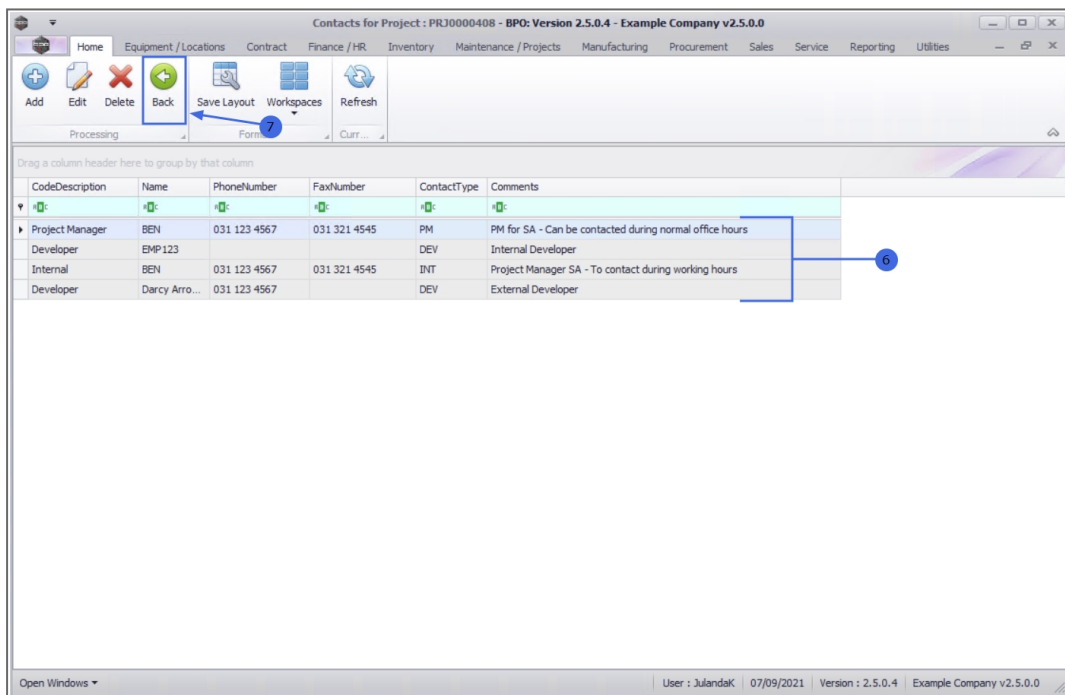


4. When you receive the **Delete Note** message to confirm;
 - **Are you sure you want to delete this contact from this project PRJ[project ref number]?**
5. Click on **Yes**.



6. The contact has been removed from the **Contacts for Project** list.

7. Click on **Back** to return to the Project Listing screen.



MNU.058.057