PROJECT CONTACT QUICK ADD
Provides guidance for quickly adding or editing Contacts in the Capital Project Record in Facilities Connect.

▼ GETTING STARTED
The Project Record must be in the Revision in Progress status to add or edit Contacts.

DIRECTIONS:

1 From the Project Record,
   1 Click on the Contacts tab.

2 From the Contacts tab, scroll down to the Contact Rows.
DIRECTIONS:

3 For the required Contacts, the Role field has been added by default.

3a Click on the Name field.

3b Begin typing the name of the Contact you wish to add. The names will filter and narrow as you type.

- IMPORTANT

The Contact must exist in Facilities Connect BEFORE adding it through the Quick Add function. If the desired Contact is External, create the Contact Record first, using the Manage External Contacts reference guide.
DIRECTIONS:

Continued. For the required Contacts, the Role field has been added by default.

3c Click on the Name of the Contact when it appears.

3d Repeat process for all additional required Contacts.
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DIRECTIONS:

4. To add additional Roles,

4a. Click on the **New row** button.

4b. Click on the **Role** drop down menu.

4c. Select the **Role** from the options. *You can also type in the name of the role as well.*
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**DIRECTIONS:**

*Continued.* To add additional Roles,

4d. **Click on the Name field.**

4e. **Begin typing the name of the Contact you wish to add.** The names will filter and narrow as you type.

4c. **Click on the Name of the Contact when it appears.**

**IMPORTANT**

The Contact must exist in Facilities Connect BEFORE adding it through the Quick Add function. If the desired Contact is External, create the Contact Record first, using the Manage External Contacts reference guide.
DIRECTIONS:

Once you have all the desired Contacts added,

5 Click on Save or Save & Close button to save the new Contacts.

IMPORTANT

The Contact must exist in Facilities Connect BEFORE adding it through the Quick Add function. If the desired Contact is External, create the Contact Record first, using the Manage External Contacts reference guide.