

## About Project Team module

Project Team module is shown in the Project more information section. This module allows users to add Contacts to the project.

## How To create records in Project Team

You can add a Contact to the project by clicking on the 'Add Project Team' button shown in the 'More Information' section as shown below.

The screenshot shows the 'More Information' section of a project. It contains several expandable sections: Project Tasks, Project Milestones, Project Team, Documents, Trouble Tickets, and Charts. The 'Project Team' section is expanded, showing a table with columns: Description, Function, Resource, Comment, and Action. The table is currently empty, with the text 'None Included' in the first row. A red box highlights the 'Add Project Team' button in the top right corner of the 'Project Team' section. A red arrow points from the text 'Click on this button to create Project Team record.' to the button.

You will be taken to the Create New Project Team page as shown below. On this page, you can select the Contact to be added to the Project Team, and function in the project.

### Creating New Project Team

The screenshot shows the 'Creating New Project Team' form. It is divided into sections: Basic Information, Team Information, and Description Information. The 'Team Information' section contains the following fields:

- \*Description: Team1 for project
- Function: A dropdown menu with options: --None--, Project Manager, Assistant, IT, Steering Committee, Other. A red box highlights this dropdown with the annotation: 'Role of the Project handler can be selected here .Basically handler's role in the organisation'.
- Resource Contacts: A dropdown menu with options: --None--, Project Manager, Assistant, IT, Steering Committee, Other. A red box highlights this dropdown with the annotation: 'Contact related to project can be selected here'.
- Project Team No: AUTO GEN ON SAVE
- \*Related Project: project test. A red box highlights this field with the annotation: 'The Project name will be selected here'.
- \*Assigned To: A dropdown menu with options: User, Group, Support Group. A red box highlights this dropdown with the annotation: 'Here the The group or the User who is handling the Project should be selected'.

At the top right of the form, there are 'Save' and 'Cancel' buttons. At the bottom of the form, there are also 'Save' and 'Cancel' buttons.

After saving the Project Team record you will be taken back to the Project module related list again.

## Project Team List View

To see all Project Team records, you can click on the Project Team link as shown below.

Support > **Project Team**

[ ProjectTeam1 ] new project team - Project Team Information Updated today (05 Aug 2010)

**Project Team Information**

**Team Information**

Description	new project team	Project Team No	ProjectTeam1
Function	Assistant	Related Project	project test
Resource	Brown Elizabeth	Assigned To	Marketing Group
Created Time	2010-08-05 14:58:38	Modified Time	2010-08-05 14:58:38

**Description Information**

Comment	test comment
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**Project Team Information**

Following screen shot shows the List view of Project Team module

vtiger CRM 5

My Home Page | Marketing | Sales | **SUPPORT** | Analytics | Inventory | Tools | Settings | Quick Create... | Search

Trouble Tickets | FAQ | Accounts | Contacts | Documents | Webmail | Calendar | Service Contracts | Project Milestones | Project Tasks | Projects

Support > Project Team

Search for [ ] In [ Description ] Search Now

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Delete Mass Edit Showing Records 1 - 2 of 2 Filters: All

Description	Function	Related Project	Resource	Action
<input type="checkbox"/> new project team	Assistant	project test	Brown Elizabeth	edit   del
<input type="checkbox"/> It Team	IT	project test	Johnson Patricia	edit   del

Delete Mass Edit Showing Records 1 - 2 of 2