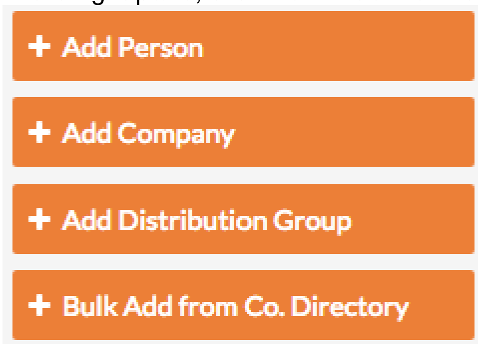
***Once the Project has been added to Procore the Project team needs to be added in the Job Directory.**

Adding Project Team to the Directory (Estimating Coordinator)

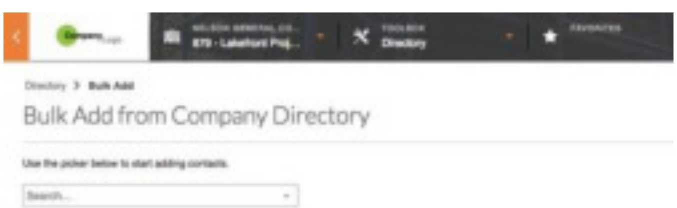
Margo Culwell, Russ Ingram, and Shelley Stone are automatically added to all new projects.

1. Navigate to the project's **Directory** tool. This reveals the Project Directory page.

2. In the right pane, click **Bulk Add from Co. Directory**.



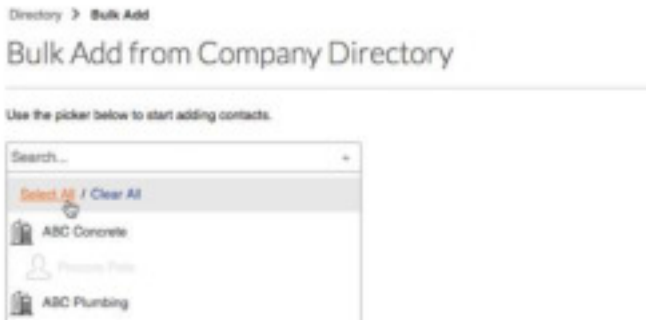
This opens the 'Bulk Add from Company Directory' page.



3. Choose from the following options:

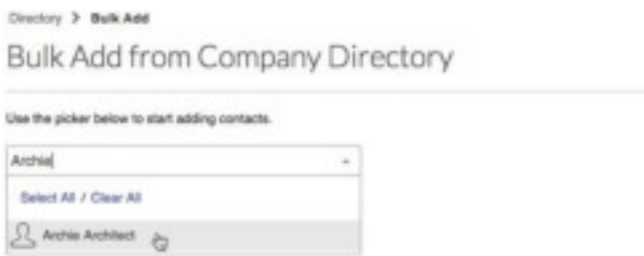
   - **Bulk Add All People and Companies from the Company Directory**

   To bulk add all the people and companies in the Company Directory to the project, click **Select All**. This adds all of the records from the Company Directory to a table on the page (*Note*: To remove all of the selections in the table, click **Clear All**).



- **Bulk Add a Person**

To add a person, start typing the person's name in the **Search** box. Then select the matching person's name from the drop-down list to add the person to a table on the page.

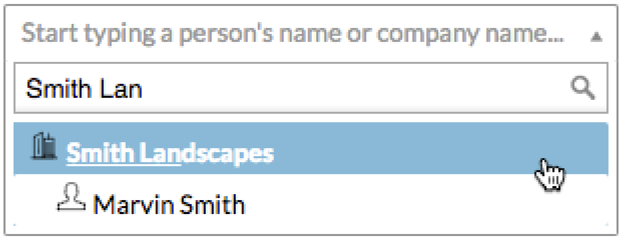


- **Bulk Add a Company**

To add a company, start typing the company name. Then select the matching company name from the drop- down list.

- **Bulk Add a Company and its Employees**

To add a company and its employees, start typing the company name. Then select the matching company name from the drop-down list. If the company has employees, their names appear below the company name. A dialog box also appears so you can click **OK** to confirm that you want to add all of the company's employees.



4. If you added users to the table on the Bulk Add from Company Directory page, you will also need to complete these steps:
   - **Apply a Permission Template**

   For each user, select the appropriate permission template from the **Permission Template** list. There are two Subcontractor/Vendor permissions set-up in Procore. If the person will need access to the commitment at anytime make sure that they are assigned the Subcontractor/Vendor-External permission template.
   AND
   - **Select a Project Role**

   For each user, select the appropriate project role from the **Project Role** list. This is very important.

   - **(Optional) Notify the Person**

   If you want the system to send an email notification to the person to let them know they were added to the project, mark the **Notify** checkbox.

   - **Remove the Person (or Company)**

   If you want to remove a person (or company) from the list, click the RED 'x'.

5. Scroll to the bottom of the page. Then click **Add to Project**.

   A banner appears to confirm that the system is adding the changes to the Project Directory.

***If the vendor you are looking for has not been added to the company directory please contact Dawn or Monica to add them. Please provide them with the correct vendor # from Sage.**

Add General Project Information (Estimating Coordinator Initially and PA to verify)

1. Navigate to the project's **Admin** tool. This reveals the Admin page.
2. Under 'Project Settings', make sure **General** is selected.