MT+ How to manage contacts

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The project contacts as indicated in the grant application form (if not changed during selection process) will automatically receive an email when the project is created in the Mobility Tool+. The project contact can create additional users for the participating organisations.

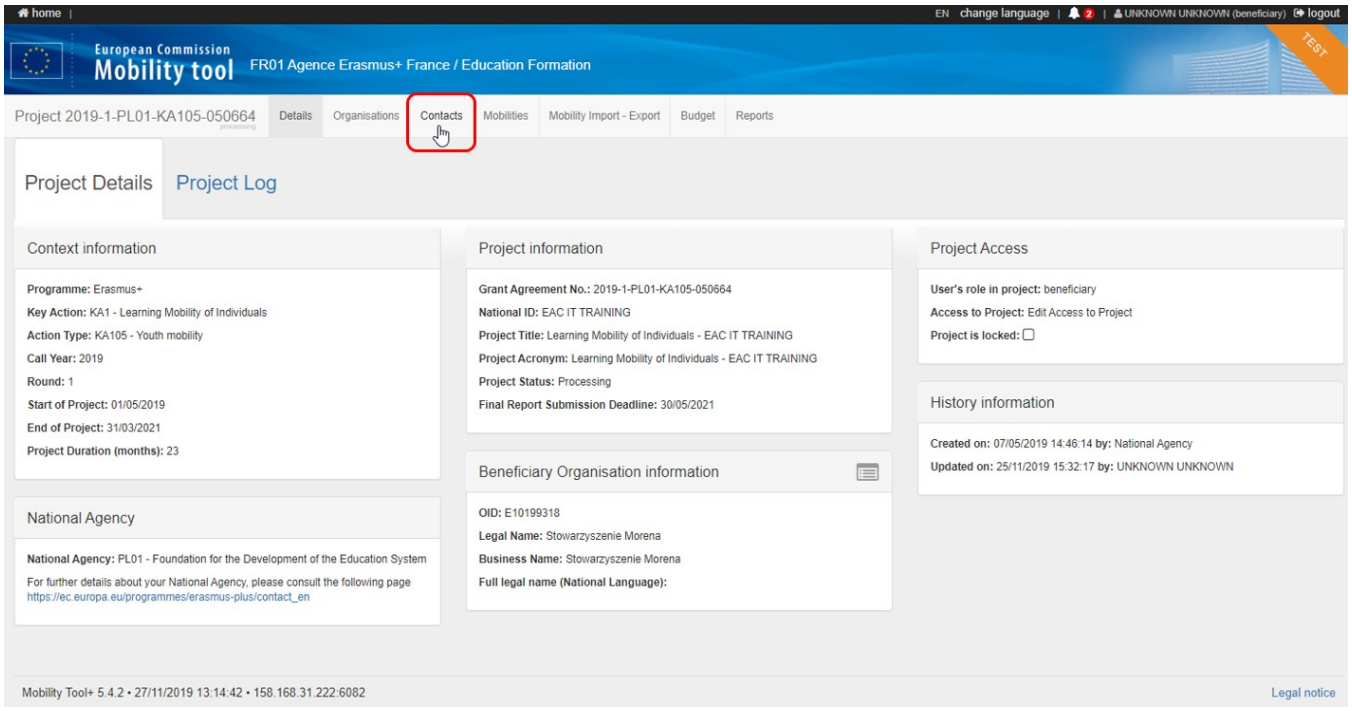
Edit access can be given to other contacts of the coordinating or beneficiary organisation. View access to the project can also be given for KA2 projects.

For European Solidarity Corps please view the page ESC MT+ How to manage contacts.

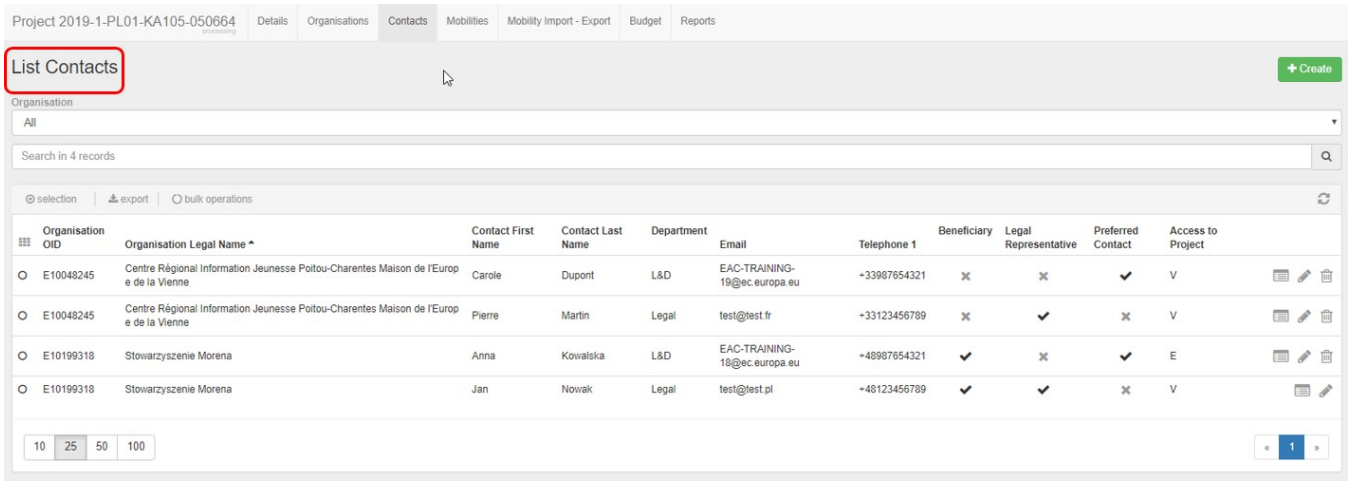
Steps

1. Click the "Contacts" menu item

In Mobility Tool+, click on the **Contacts** tab.



The list of contacts appears. The full list of project contacts entered in the application form will be visible here.



2. Filter per organisation

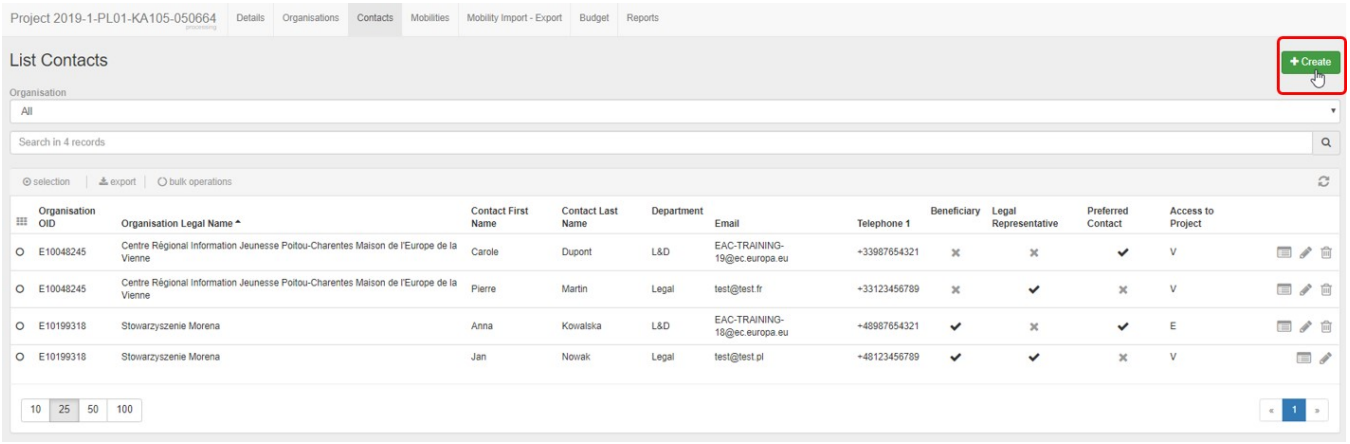
On top of the contact list you can filter the contacts by organisation, using the available drop-down. Only contacts for the selected organisation will then be displayed in the list.



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3. Click the "+Create" button

To add a new contact click on the **+Create** button.



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4. Fill in the details

The **Contact Details** screen opens. All mandatory fields are indicated with the message **value required** in an orange box.



Contact Details

values cannot be saved

Organisation

Stowarzyszenie Morena [Beneficiary]

Contact First Name

value required

Contact Last Name

value required

Title

value required

Contact Gender

Female

Department

Position

value required

Email

value required

Legal Representative

Preferred Contact

OLS

Access to Project

- Edit Access to Project
- View Access to Project
- No Access to Project

Same as Organisation

Legal Address

value required

Country

value required

Region

City

value required

P.O. Box

Post Code

value required

CEDEX

Telephone 1

value required

Telephone 2

Contact Comments

Cancel

values cannot be saved

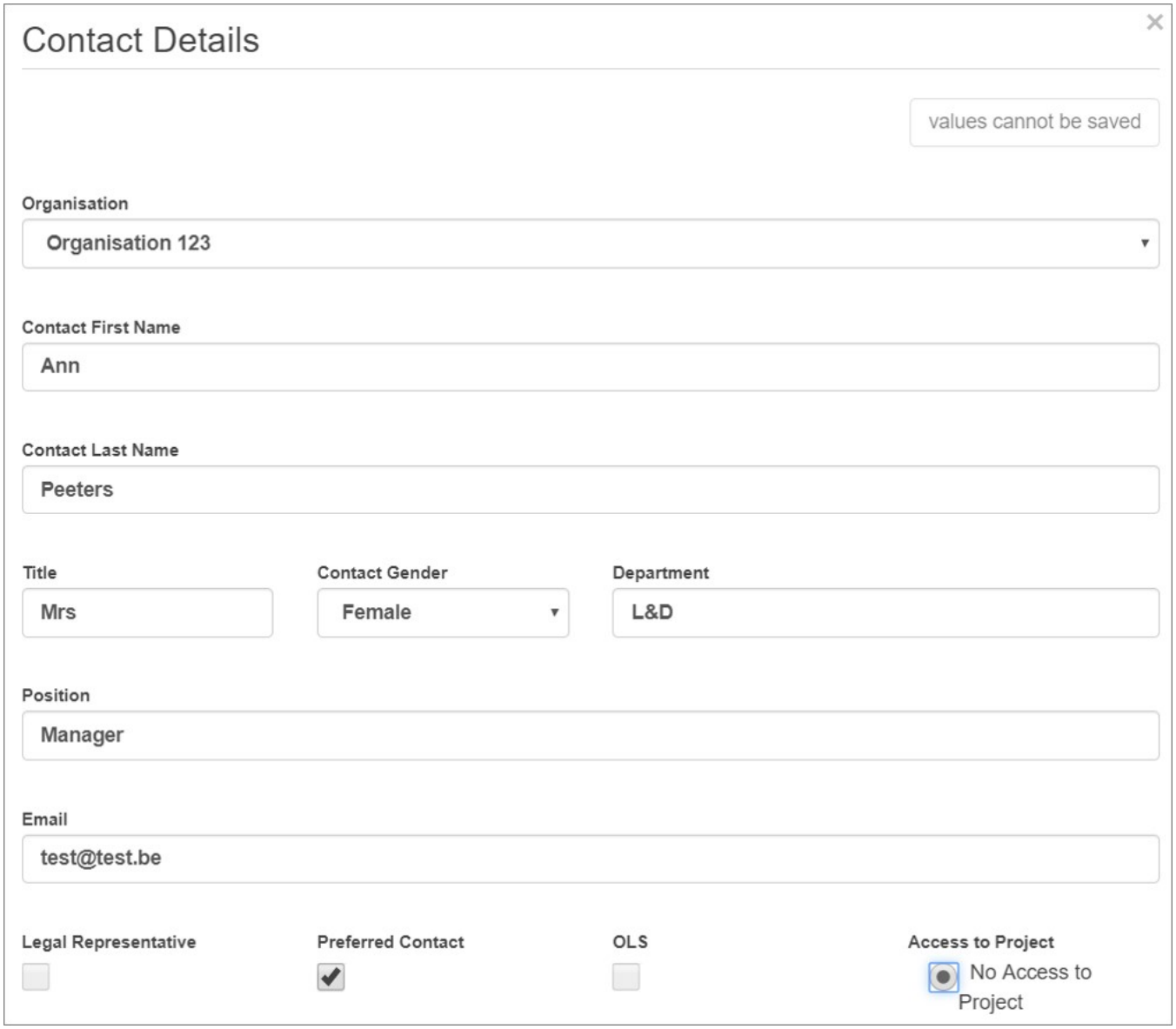
4.1. Select the organisation

Select the organisation for which you want to enter the contact details from the drop-down list. This will affect the available active check boxes and the options for access of the contact person to the project.



4.2. Enter all mandatory details

After you selected the organisation, continue to provide all required details.



4.3. Allow access to the Project?

Depending on the organisation, you can select the **Access to Project** type for a contact. Click the specific radio button to allow **Edit Access**, **View Access** or **No Access** to the project details in Mobility Tool+.

Information

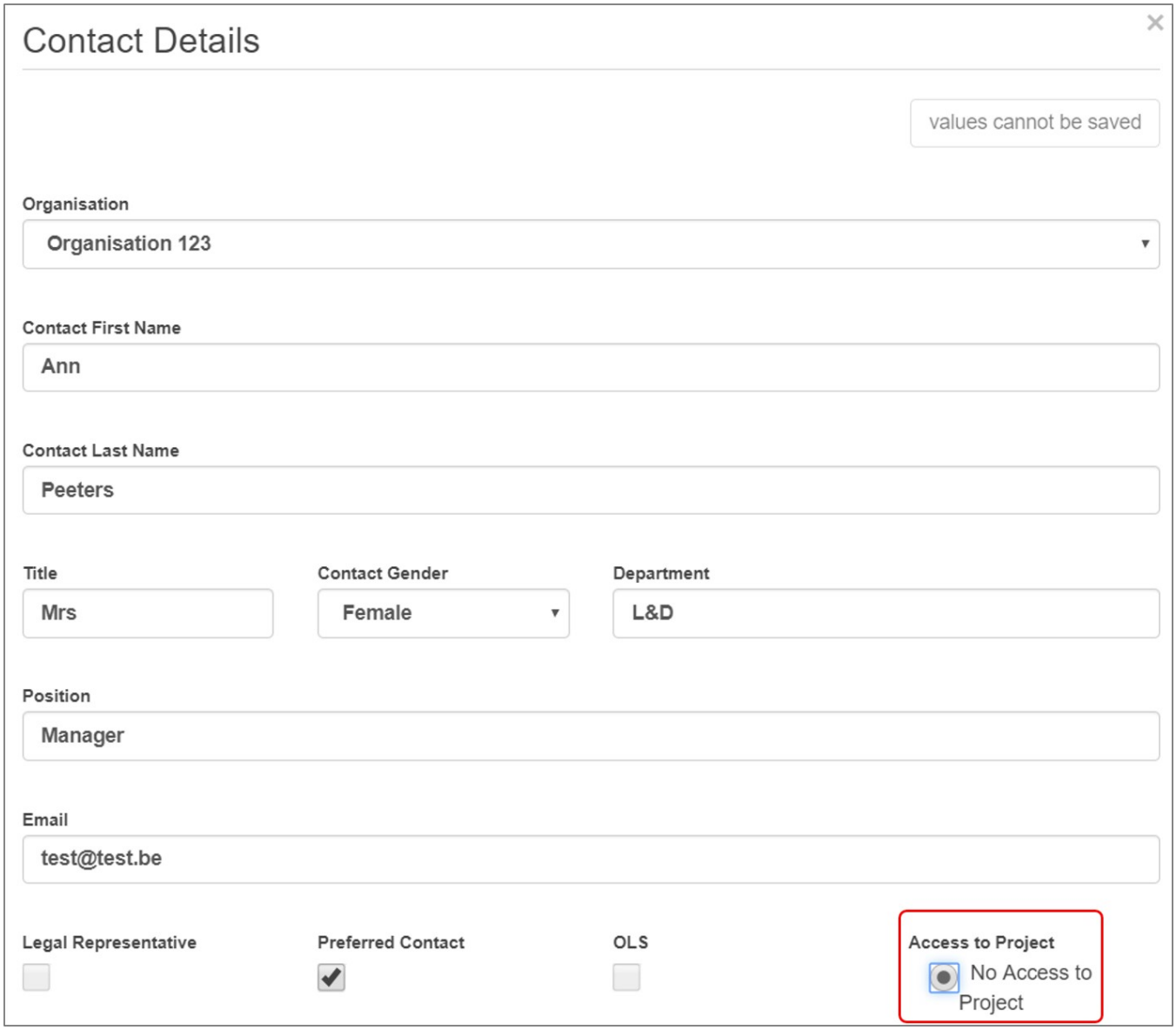
For **KA1** and **KA3** projects, it is only possible to allow edit access to contacts of the Beneficiary organisations.

For **KA2** projects (excluding those as indicated as schools only) a contact from a participating organisation may be provided access to view the project but will not have access to edit the project details.

For **KA201** indicated as schools only the participant organisations contacts can be given access to view the coordinator's project. The contacts from the coordinating organisation can be given access to view all participating organisations' projects.

A contact person with edit access has all rights to update the project. The beneficiary remains responsible of granting edit access to users.

In our example, **No access to project** is the only available option, which is automatically checked.

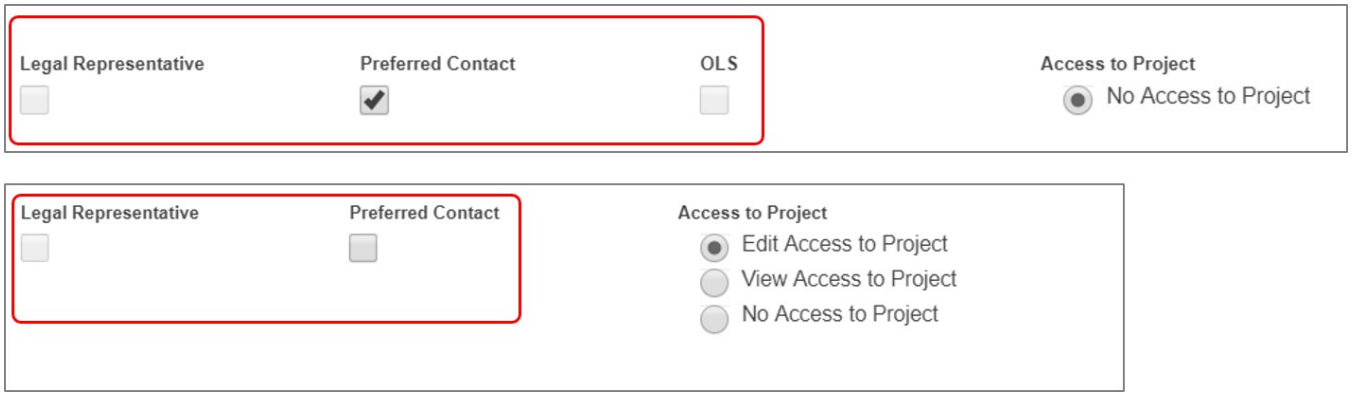


4.4. Indicate "Preferred Contact", "OLS" contact and/or "Legal Representative"?

You have three check boxes available to indicate the role of the contact for the specific organisation.

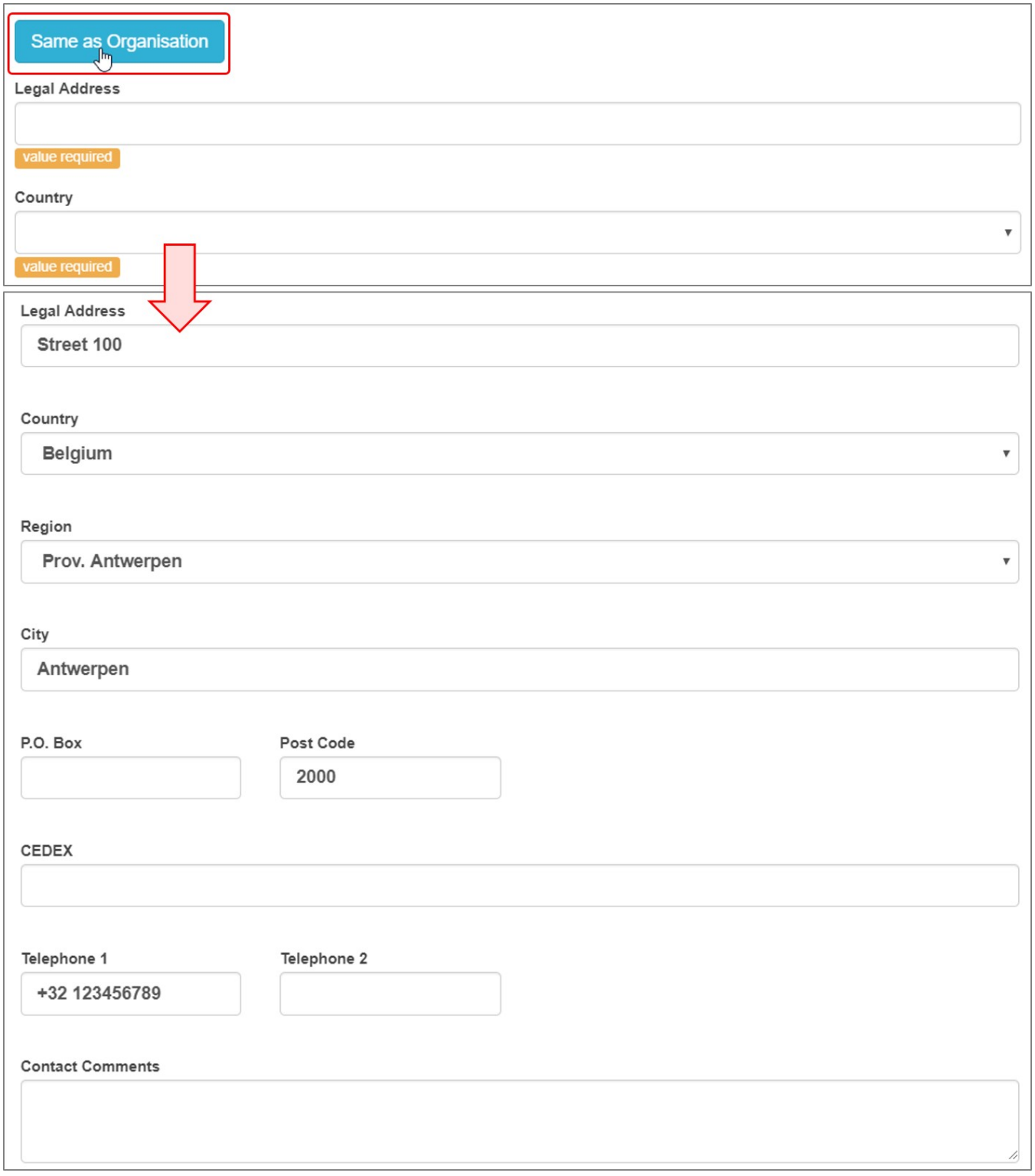
- **Preferred Contact:**
  - If you select this radio button, the contact(s) will be marked as such in the organisation list as the preferred contact person(s) for that organisation.
  - The preferred contact will receive the automatic notifications when the project data is updated in the NA's Project Management System and resubmitted to Mobility Tool+ by the National Agency.
  - By default this is the project contact as outlined in the application form but may be changed to a newly created contact for the beneficiary organisation.
- **OLS Contact**:
  - Is available for information purposes.
  - Only a contact for the beneficiary or coordinating organisation can be indicated as an OLS contact.
- **Legal representative:**
  - This check box is not active.
  - Only once the contact is indicated in the NA's Project Management System as a legal representative, the box will be checked.
  - The legal representative details cannot be adjusted in Mobility Tool+ if from the applicant / coordinating organisation. To adjust the legal representative details please contact your National Agency.

Here two examples of the possible check boxes displayed:



4.5. Contact details are the "Same as Organisation"?

Click on **Same as Organisation** to copy the organisation address and phone details to the contact's details. If the address for the contact is different than the organisation one you can fill in the details manually.

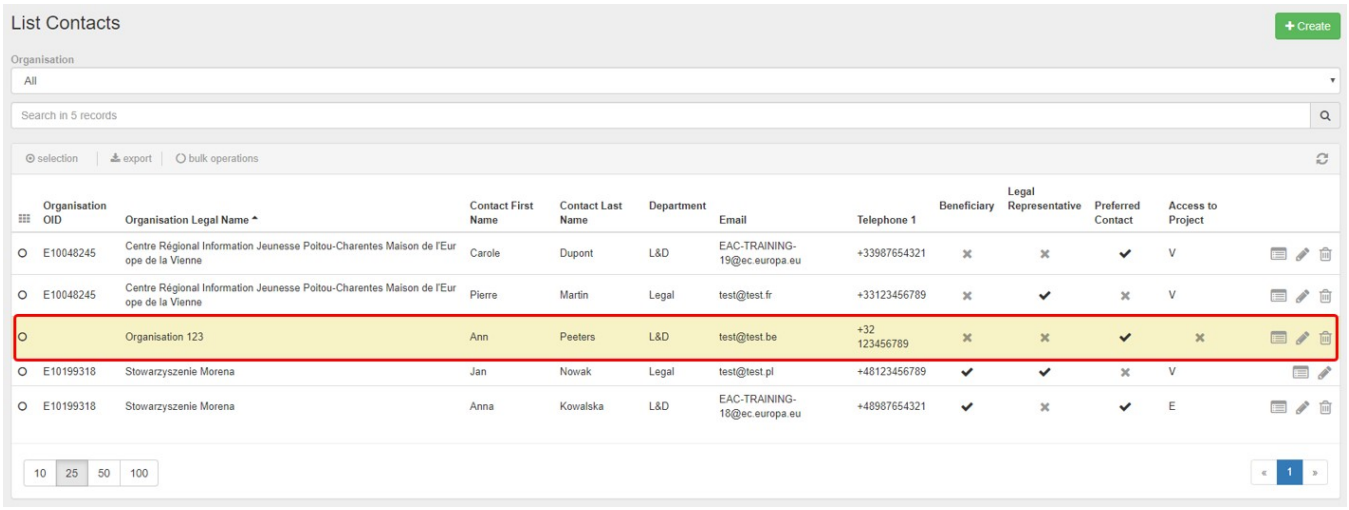

Same as Organisation
Legal Address
value required
Country
value required
Legal Address
Street 100
Country
Belgium
Region
Prov. Antwerpen
City
Antwerpen
P.O. Box
Post Code
2000
CEDEX
Telephone 1
+32 123456789
Telephone 2
Contact Comments

5. Click on "Save"

Once all information is entered, click the **Save** button to save the newly created contact.



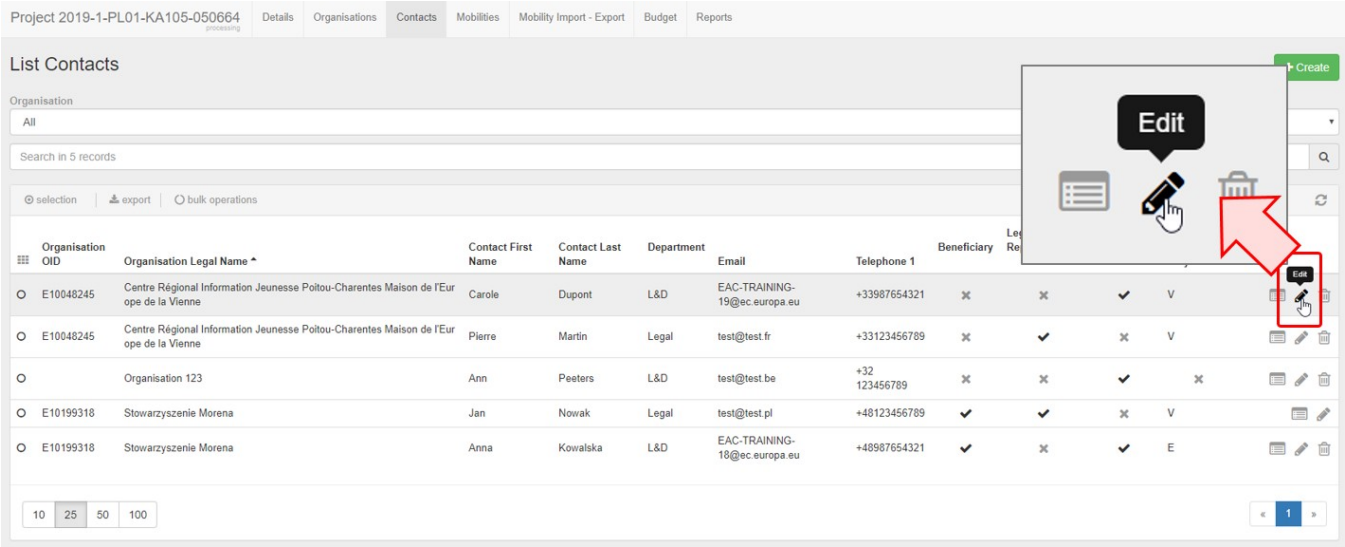
The list of contacts will open again and the new contact is displayed.



6. Editing a contact

Click on the **pencil** icon to edit a contact.

> **Information**
>
> Project contacts can also be updated in Mobility Tool+ **after** project finalisation by the National Agency. The new contact person will be able to view the details of the project.



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7. Deleting a contact

1. Click on the **bin** icon to delete a contact.
2. Confirm the deletion if you want to go ahead.
3. Another success message displays on top of your screen.

> The legal representative cannot be deleted.

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8. Contact information in the list of organisations

In the list of organisations (accessible via the Organisations tab) you have a column available displaying a small icon indicating how many contacts are registered for each organisation.

Clicking on the contacts icon will bring you directly to the contact list for the organisation.

Related articles

- MT+ Notifications
- MT+ Menu and Navigation
- MT+ Basics and variations of the mobility screen for KA1
- MT+ List functionality
- MT+ Update OID or confirm changed organisation details
- MT+ EU Login for user
- MT+ Project Details
- MT+ KA1 and KA3 Budget screen
- MT+ How to get access