

MT+ How to manage contacts

- [Steps](#)
 - [1. Click the "Contacts" menu item](#)
 - [2. Filter per organisation](#)
 - [3. Click the "+Create" button](#)
 - [4. Fill in the details](#)
 - [5. Click on "Save"](#)
 - [6. Editing a contact](#)
 - [7. Deleting a contact](#)
 - [8. Contact information in the list of organisations](#)
- [Related articles](#)

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 screenshot shows the Mobility tool interface. The top navigation bar includes 'home', 'change language', and a user profile 'UNKNOWN UNKNOWN (beneficiary)' with a 'logout' button. The main header displays the European Commission logo, 'Mobility tool', and 'FR01 Agence Erasmus+ France / Education Formation'. Below the header, a breadcrumb trail shows 'Project 2019-1-PL01-KA105-050664' followed by tabs: 'Details', 'Organisations', 'Contacts' (highlighted with a red box and a mouse cursor), 'Mobilities', 'Mobility Import - Export', 'Budget', and 'Reports'. The main content area is divided into three columns. The left column contains 'Project Details' and 'Project Log'. The middle column is titled 'Context information' and includes 'Programme: Erasmus+', 'Key Action: KA1 - Learning Mobility of Individuals', 'Action Type: KA105 - Youth mobility', 'Call Year: 2019', 'Round: 1', 'Start of Project: 01/05/2019', 'End of Project: 31/03/2021', 'Project Duration (months): 23', 'National Agency', and 'National Agency: PL01 - Foundation for the Development of the Education System'. The right column is titled 'Project information' and includes 'Grant Agreement No.: 2019-1-PL01-KA105-050664', 'National ID: EAC IT TRAINING', 'Project Title: Learning Mobility of Individuals - EAC IT TRAINING', 'Project Acronym: Learning Mobility of Individuals - EAC IT TRAINING', 'Project Status: Processing', 'Final Report Submission Deadline: 30/05/2021', 'Beneficiary Organisation information', 'OID: E10199318', 'Legal Name: Stowarzyszenie Morena', 'Business Name: Stowarzyszenie Morena', and 'Full legal name (National Language):'. The bottom right section is titled 'Project Access' and includes 'User's role in project: beneficiary', 'Access to Project: Edit Access to Project', 'Project is locked: ☐', and 'History information' with 'Created on: 07/05/2019 14:46:14 by: National Agency' and 'Updated on: 25/11/2019 15:32:17 by: UNKNOWN UNKNOWN'. The footer shows 'Mobility Tool+ 5.4.2 • 27/11/2019 13:14:42 • 158.168.31.222.6082' and a 'Legal notice' link.

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

The screenshot shows the 'List Contacts' table in the Mobility tool interface. The top navigation bar is the same as the previous screenshot, with the 'Contacts' tab highlighted. The main content area is titled 'List Contacts' (highlighted with a red box) and includes a '+ Create' button. Below the title, there is a search bar with 'All' selected and a search icon. The table has columns: 'Organisation', 'Organisation Legal Name', 'Contact First Name', 'Contact Last Name', 'Department', 'Email', 'Telephone 1', 'Beneficiary', 'Legal Representative', 'Preferred Contact', and 'Access to Project'. The table contains four rows of contact information. The first two rows are for 'Centre Régional Information Jeunesse Poitou-Charentes Maison de l'Europe de la Vienne' and the last two are for 'Stowarzyszenie Morena'. The table also includes a 'selection' button, an 'export' button, and a 'bulk operations' button. At the bottom, there is a pagination bar showing '10', '25', '50', and '100' records per page, and a '1' page indicator.

Organisation	Organisation Legal Name	Contact First Name	Contact Last Name	Department	Email	Telephone 1	Beneficiary	Legal Representative	Preferred Contact	Access to Project
E10048245	Centre Régional Information Jeunesse Poitou-Charentes Maison de l'Europe de la Vienne	Carole	Dupont	L&D	EAC-TRAINING-19@ec.europa.eu	+33907654321	✗	✗	✓	V
E10048245	Centre Régional Information Jeunesse Poitou-Charentes Maison de l'Europe de la Vienne	Pierre	Martin	Legal	test@test.fr	+33123456789	✗	✓	✗	V
E10199318	Stowarzyszenie Morena	Anna	Kowalska	L&D	EAC-TRAINING-18@ec.europa.eu	+48907654321	✓	✗	✓	E
E10199318	Stowarzyszenie Morena	Jan	Nowak	Legal	test@test.pl	+48123456789	✓	✓	✗	V

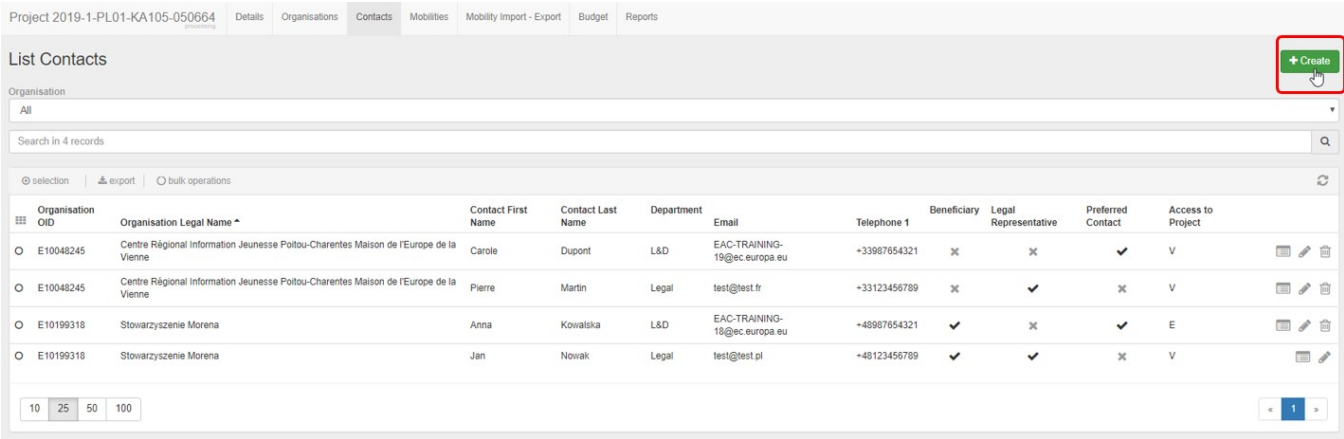
2. Filter per organisation

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.



3. Click the "+Create" button

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



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 First Name

value required

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.

Contact Details

values cannot be saved

Organisation

Stowarzyszenie Morena [Beneficiary]

Stowarzyszenie Morena [Beneficiary]

Centre Régional Information Jeunesse Poitou-Charentes Maison de l'Europe de la Vienne

Organisation 123

4.2. Enter all mandatory details

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

Contact Details

×

values cannot be saved

Organisation

Organisation 123

▼

Contact First Name

Ann

Contact Last Name

Peeters

Title

Mrs

Contact Gender

Female

▼

Department

L&D

Position

Manager

Email

test@test.be

Legal Representative

☐

Preferred Contact

☒

OLS

☐

Access to Project

☒ No Access to Project

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.

Contact Details

values cannot be saved

Organisation

Organisation 123

Contact First Name

Ann

Contact Last Name

Peeters

Title

Mrs

Contact Gender

Female

Department

L&D

Position

Manager

Email

test@test.be

Legal Representative

☐

Preferred Contact

☒

OLS

☐

Access to Project

☒ No Access to Project

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:

Legal Representative	Preferred Contact	OLS	Access to Project
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/> No Access to Project

Legal Representative	Preferred Contact	Access to Project
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/> Edit Access to Project <input type="radio"/> View Access to Project <input type="radio"/> No Access to Project

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.

Contact Details

Save

Organisation

Organisation 123

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

List Contacts

+ Create

Organisation

All

Search in 5 records

selection

export

bulk operations

Organisation OID	Organisation Legal Name *	Contact First Name	Contact Last Name	Department	Email	Telephone 1	Beneficiary	Legal Representative	Preferred Contact	Access to Project	
<input type="radio"/> E10048245	Centre Régional Information Jeunesse Poitou-Charentes Maison de l'Eur ope de la Vienne	Carole	Dupont	L&D	EAC-TRAINING- 19@ec.europa.eu	+33907654321	✗	✗	✓	V	<div></div> <div></div> <div></div>
<input type="radio"/> E10048245	Centre Régional Information Jeunesse Poitou-Charentes Maison de l'Eur ope de la Vienne	Pierre	Martin	Legal	test@test.fr	+33123456789	✗	✓	✗	V	<div></div> <div></div> <div></div>
<input type="radio"/> Organisation 123		Ann	Peeters	L&D	test@test.be	+32 123456789	✗	✗	✓	✗	<div></div> <div></div> <div></div>
<input type="radio"/> E10199318	Stowarzyszenie Morena	Jan	Nowak	Legal	test@test.pl	+48123456789	✓	✓	✗	V	<div></div> <div></div> <div></div>
<input type="radio"/> E10199318	Stowarzyszenie Morena	Anna	Kowalska	L&D	EAC-TRAINING- 18@ec.europa.eu	+48907654321	✓	✗	✓	E	<div></div> <div></div> <div></div>

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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.

Project 2019-1-PL01-KA105-050664
processing

DetailsOrganisations**Contacts**MobilitiesMobility Import - ExportBudgetReports

List Contacts











Organisation
All

Search in 5 records

☐ selection

☐ export

☐ bulk operations

Organisation OID	Organisation Legal Name *	Contact First Name	Contact Last Name	Department	Email	Telephone 1	Beneficiary	Le Re					
<input type="radio"/> E10048245	Centre Régional Information Jeunesse Poitou-Charentes Maison de l'Eur ope de la Vienne	Carole	Dupont	L&D	EAC-TRAINING- 19@ec.europa.eu	+33987654321	✕	✕	✓	V			
<input type="radio"/> E10048245	Centre Régional Information Jeunesse Poitou-Charentes Maison de l'Eur ope de la Vienne	Pierre	Martin	Legal	test@test.fr	+33123456789	✕	✓	✕	V			
<input type="radio"/>	Organisation 123	Ann	Peeters	L&D	test@test.be	+32 123456789	✕	✕	✓	✕			
<input type="radio"/> E10199318	Stowarzyszenie Morena	Jan	Nowak	Legal	test@test.pl	+48123456789	✓	✓	✕	V			
<input type="radio"/> E10199318	Stowarzyszenie Morena	Anna	Kowalska	L&D	EAC-TRAINING- 18@ec.europa.eu	+48987654321	✓	✕	✓	E			

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Edit








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.

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](#)