




Deltek

Deltek Vantagepoint 4.0

Salesforce Integration Technical Guide

March 12, 2021



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This edition published March 2021.

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Contents

Overview	1
Adding Custom Notes to This Guide	1
Using Salesforce Integration	2
Terminology	3
Before You Begin.....	4
Set Up Labels and Lists.....	4
Set Up User-Defined Fields.....	4
Review and Clean Up Your Salesforce Data.....	4
Recommendations	4
Duplicate Record Checks	5
Configuration Process for Salesforce Integration.....	6
Enable Salesforce to Communicate with Vantagepoint.....	6
Configure Vantagepoint to Connect with Salesforce	7
Set Up Data Options	7
Run the Initial Import	8
Confirm Data After the Initial Import	9
Vantagepoint and Salesforce Data Mapping.....	10
Standard Data Mapping for Opportunities	10
Standard Data Mapping for Contacts	11
Standard Data Mapping for Accounts.....	11
Add Mapped Fields to the Data Mapping Grid.....	12
Troubleshooting	13
Verify Salesforce Connection Information	13
Errors Sending Records from Salesforce to Vantagepoint	13
View Error Notifications	13
View the Salesforce Integration Error Log	14
Check Errors in the Process Queue Manager	14
Appendix A: Inline Errors	15
Inline Missing Required Field	15
Inline Truncation Warning.....	15
Appendix B: Import Errors.....	16
Missing Mapped Field.....	16
Duplicate Code	16

State and Country Discrepancy	16
Salesforce field has too many characters	16
Min and Max Errors.....	16
Missing Required Field	16
Workflow Error	16
API Error	17
Authentication Error	17
Could not find Owner	17
Expired Token.....	17
Audit Trail.....	17
Appendix C: If You Need Assistance	18
Customer Services	18
DelteK Support Center	18
Access Deltek Support Center	19

Overview

Welcome to the Vantagepoint Salesforce Integration Guide. When you own both Vantagepoint CRM or CRM Plus and Salesforce, you can set up integration between the two products. This enables you to share opportunity, account, and contact information entered in Salesforce with Vantagepoint, and streamline the creation of estimates, proposals, and project plans in Vantagepoint.


This guide is intended for a system administrator and describes how to complete the following tasks to integrate Vantagepoint and Salesforce:

1. Configure the connection between Salesforce and Vantagepoint.
2. Review and modify data mapping between Salesforce objects and Vantagepoint objects.
3. Troubleshoot any issues that occur when running the integration process.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it [here](#) free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at the far right.
2. In the **Annotations** pane that displays, click  **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.

Note: Deltek recommends that you save the document to a different filename, to keep the original file from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

Using Salesforce Integration

The integration between Vantagepoint and Salesforce enables you to import existing Salesforce data into Vantagepoint to perform key sales tasks. This integration is one-directional—you can import certain new or updated records from Salesforce to Vantagepoint. The records are then “linked” between the two products.

In Vantagepoint, you run the Salesforce import process, or schedule it to run at a future time, in **Utilities » Integrations » Salesforce**.

Related notes:

- The integration between Vantagepoint and Salesforce supports one instance of Salesforce with one Vantagepoint database.
- To make the connection, the Salesforce application must be configured to support web service APIs.
- Vantagepoint combines opportunities and projects, which allows you to track important information about a project throughout the project lifecycle and eliminates the need to create a project, separate from an opportunity.

As a result, the Salesforce Integration populates in-pursuit projects, rather than opportunities. You can import into any former opportunity field, or existing project field, in the Projects hub.

- The integration supports multiple currencies.

Terminology

If you are new to the integration, review the following equivalent terms:

Vantagepoint	Salesforce
Firm	Account
Revenue	Amount
Source	Lead Source

Before You Begin

Before you begin the integration process, ensure both the Vantagepoint and Salesforce applications and associated data are set up for a successful connection and information sharing.

Complete the procedures in this section in the sequence that they are presented.

Set Up Labels and Lists

To ensure conformity with entries in Salesforce, review the entries in Vantagepoint Labels and Lists. Each Salesforce field that you want to import must have a corresponding field in Vantagepoint.

To set up Labels and Lists:

1. On the Navigation pane in Vantagepoint, select **Settings » Labels and Lists » Summary**.
2. On the Summary form, review your current labels and the number of values specified for each of the drop-down lists.
3. On the Navigation pane, select **Settings » Labels and Lists » Labels**.
4. On the Labels form, replace default Vantagepoint labels with those that are used in your firm (for example, replace the default "Client" with "Customer").
5. On the Navigation pane, select **Settings » Labels and Lists » Lists**.

On the Lists form, specify the values that are available for selection in drop-down lists for some Vantagepoint fields; pay special attention to lists that map to opportunities, firms, or contacts, as they require an exact name match.

For example, you might use this form to specify a list of the valid opportunity stages for your firm.

Set Up User-Defined Fields

Before you begin the import process, set up any necessary user-defined fields. User-defined fields are included in the Vantagepoint Field list for the Data Mappings grid in Vantagepoint.

You add user-defined fields in **Settings » General » Screen Designer**.

Review and Clean Up Your Salesforce Data

Before you make your integration active, review the Salesforce data that will be imported into Vantagepoint. This is necessary because the integration process cannot distinguish between data that is acceptable and data that is corrupt.

Warning: It is significantly easier to clean up Salesforce data before you complete the import process than to address problems after the process completes.

Recommendations

Review the following recommendations for cleaning up Salesforce data:

- Make sure that names and records are consistently structured. For example, make sure that you use the same name for accounts that are associated with contacts and opportunities.

- Pay special attention to addresses and use the same wording and abbreviations across them. For example, use Dr. or Drive, but not both in your addresses. This consistency helps minimize duplicate records.
- The **Salesforce User** specified for the integration must have read permissions on all fields mapped, including implicitly mapped fields. Ensure that there are no mapped fields that show “Is Private” for the Salesforce User.

Duplicate Record Checks

The following fields are checked for duplicate records:

Field	Logic Used in Checking for Duplicates
Accounts/Firms	Account Number match and then exact match on name or alias.
Contacts	Contact email and then exact match on first name + last name or preferred name + last name.
Opportunities	Exact match on name.
Firm Addresses	Exact match on whole address.
Employee Roles	Match on first name and last name or email. If there is a match, a link is added; if not, no link is added.

Configuration Process for Salesforce Integration

You must complete the instructions in this section before you run the Salesforce import process.

Step	Procedure	Where Performed
1	Enable Salesforce to communicate with Vantagepoint.	Salesforce: Create » Apps
2	Configure Vantagepoint to connect with Salesforce.	Vantagepoint: Utilities » Integrations » Salesforce » Connect Your Salesforce Instance
3	Set up data options and then run the initial import .	Vantagepoint: Utilities » Integrations » Salesforce. Select new records only .
4	Confirm data after the initial import.	Review data to confirm accurate import.
5	View the error log.	Vantagepoint: Utilities » Integrations » Salesforce

Enable Salesforce to Communicate with Vantagepoint

You must enable the Salesforce application to communication with Vantagepoint.

To enable communication between Salesforce and Vantagepoint:

- In the Salesforce Navigation pane, select **Setup » Build » Create » Apps**.
- Complete the following fields:
 - Connected App Name**
 - API Name**
 - Contact Email**
- Copy the **Callback URL** listed on the Salesforce form in Vantagepoint **Utilities » Integration**.
If you receive a “redirect uri mismatch” error, check that you entered the URL correctly. This URL is case sensitive. Also check that there is no unwanted blank character space at the beginning or the end of the URL.
- In the **Available OAuth Scopes** field, select the **Full Access (full)** option and the **Perform requests on your behalf at any time (refresh_token, offline_access)** option.
- On the API Enable OAuth Settings form, document the values in the **Consumer Secret** and **Consumer Key** fields.
You need these values when you configure Vantagepoint to connect with Salesforce.
- Navigate to **Administer » Manage Apps » Manage Connected Apps** and click the app that you just created.
- Under **OAuth Policies**, confirm that **Permitted Users** is set to **All users may self-authorize**.
- If you need to change the **Permitted Users** setting, use the options under **Edit Policies**.

Configure Vantagepoint to Connect with Salesforce

Use the Integrations utility to enable the Salesforce Integration and configure the connection.

To enable the Salesforce integration and configure the connection settings:

1. On the Navigation pane in Vantagepoint, select **Utilities » Integrations » Salesforce**.
2. On the Salesforce form, enter in the **Consumer Secret** and **Consumer Key** fields the values that you documented in the previous procedure.

If you receive an “invalid client id” error message, copy and paste the client id and secret from Salesforce.

3. Click **Connect** to connect the Salesforce instance to Vantagepoint.

If the connection is successful:

- The **Connect** button changes to **Disconnect**. You can click this button at any time to disconnect Salesforce from Vantagepoint.
- A “Salesforce was Successfully Connected” message displays in the top banner.
- The **Data Update Options**, **Advanced Options**, and **Data Mapping** sections are enabled.

If the connection is not successful:

- Failures are recorded in an error log table.
- A “Connection was not successful” message displays in the top banner.
- If alerts are configured, Vantagepoint sends a notification center alert to those users with roles impacted by the failure.

4. To view details from the most recent error log, click **View Last Error Log**.

Set Up Data Options

After you have established a connection with Salesforce, you can set up the Vantagepoint data options to specify how and when Vantagepoint records are updated with Salesforce information.

To set up data options:

1. On the Navigation pane in Vantagepoint, select **Utilities » Integrations » Salesforce**.
2. On the Salesforce form, in the Data Update Options section, enter a value in the **Schedule Your Data Update Intervals** field.

This interval determines how often the data is updated with Salesforce records. For example, if you specify **8 Hours**, Vantagepoint runs the data import every 8 hours. These processes run in the background and do not interrupt your work. For more information, see the online help about the Process Server utility.

Clicking **Update Now** after the process server is already queuing up the next scheduled update may result in an incorrect value in the **Next Scheduled Update** field. (The update will never run later than the time specified in this field.)

3. Under **Import Record Options**, select the **Import only new records** option.

This is required because there are no existing records in Vantagepoint at this point. After the initial import, you can select **Import new records and update existing records**.

4. If appropriate, use the **Stage** option to specify the stage of the records that you want to import.
For example, you can choose to import only those opportunities that are in a specific stage in the pipeline to ensure that your data remains clean and actionable.
5. In the remaining fields on the form, specify any advanced data import options as needed.
If you choose to honor screen designer fields, you must map those fields using the data mapping section. Certain fields, such as **Name**, are always required.
6. Use the **Honor workflow rules on import?** option to specify whether workflow rules that are set up in Salesforce should be honored upon import into Vantagepoint.
For example, set this option to **Yes** if a workflow associated with the creation of a new record should be triggered when importing new records.
7. Under **Error notification method**, indicate whether you want to receive an email message in addition to notification center alerts if there are connection or data errors.
These notifications are sent to the user role that is specified in the **Security Role** field.
8. Select the **Opportunity Mapping**, **Account Mapping**, and **Contact Mapping** options to specify the data mapping for each area.
As you select each option, the Salesforce fields and Vantagepoint fields in the grid update to reflect each area. The application is set up to include default mappings.
9. Select **Save**.

Run the Initial Import

After you specify your data options, you can run the initial data import to confirm the connection and import the first round of data.

To run the initial import:

1. On the Navigation pane in Vantagepoint, select **Utilities » Integrations » Salesforce**.
2. Complete one of the following actions on the Salesforce form:
 - If you need to run the import process immediately, click **Update Now**.
This kicks off the import process immediately and then resumes the import process based on the selected interval. For example, if it is 1:00 p.m. and you choose **Update Now** with a 2 hour interval selected, the import process runs at 1:00 p.m. and then again at 3:00 p.m. and every two hours thereafter. **Update Now** is only enabled when **Enable Updates** is set to **Active**.
 - Select **Active** to run the update at the next scheduled time, which is based on the interval that is specified in the **Data Update Options** fields.
The **Update Now** button is enabled. Click this button to run the update immediately.
3. Select **Save**.

Confirm Data After the Initial Import

After the initial data import from Salesforce to Vantagepoint, verify the accuracy of the imported data before you continue.

Be sure to check the following:

- Review your labels and lists to ensure that values are correct. Pay special attention to values that were appended to the list.
- If you select to update records as well, check that your list values match your values in Salesforce to ensure that you don't have duplicate values when you update.
- Review a few opportunity, firm (accounts), and contact records. Remember that information is pulled in based on opportunities. As a result, only accounts and contacts that are related to imported opportunities are imported.

Vantagepoint and Salesforce Data Mapping

Tables in this section list the standard field mappings between Salesforce and Vantagepoint. You can add and remove fields, as needed.

Standard Data Mapping for Opportunities

The following table identifies the fields that are automatically mapped from Salesforce to Vantagepoint opportunities. You can view these field mappings under Opportunity Mapping in **Utilities » Integrations » Salesforce**. All opportunities imported from Salesforce to Vantagepoint are designated with **Status** set to **Active**, with the exception of those opportunities with a **Probability** of **0%**, which are marked as **Inactive**.

Salesforce Field Source	Vantagepoint	Notes
Account Name	Firm	Auto-mapped and cannot be changed.
Name	Name	Name of the opportunity; often includes the name of the client.
Amount	Estimated Fee	How much is the work worth if you win the opportunity?
Close Date	Won/Lost Date	The date when the opportunity was won or lost, or you decided not to pursue it.
Description	Description	Additional details about opportunity scope.
Lead Source	Source	How you learned of this opportunity, such as a past colleague or a neighbor.
Owner ID	Business Development Lead	Business Development Lead is a Vantagepoint Employee Field. If an employee record is not found in Vantagepoint that matches the Salesforce Owner, this data is not imported and a warning is displayed.
Probability (%)	Probability	How likely you are to win the work. In Vantagepoint, the probability and stage fields are not connected as they are in Salesforce. You must set the values individually.
Stage	Stage	The opportunity stage in the overall process.
Opportunity Type	Project Type	A user-defined list of opportunity types that typically describe the type of engagement, such as workshop, upgrade, new customer, and so on.

Standard Data Mapping for Contacts

The following table identifies the fields that are automatically mapped from Salesforce to Vantagepoint contacts. You can view these field mappings under Contact Mappings in **Utilities » Integrations » Salesforce**. All contacts imported from Salesforce to Vantagepoint are designated with **Status** set to **Qualified**.

Salesforce Field Source	Vantagepoint	Notes
Account Name	Firm	Auto-mapped and cannot be changed
Owner ID	Owner	If an employee record is not found in Vantagepoint that matches the Salesforce Owner, this data is not imported and a warning message is displayed.
Description	Memo	Additional details about the contact
Email	Email	Contact's email
Fax	Fax	Contact's fax
First Name	First Name	Contact's first name
Last Name	Last Name	Contact's last name
Phone	Phone	Contact's phone number
Lead Source	Source	Where did you first learn of this lead?
Mobile Phone	Mobile	Contact's mobile phone
Salutation	Salutation	Contact's salutation
Title	Title	Contact's title

Standard Data Mapping for Accounts

The following table identifies the fields that are automatically mapped from Salesforce to Vantagepoint Accounts. You can view these field mappings under Account Mappings in **Utilities » Integrations » Salesforce**. All firms imported from Salesforce to Vantagepoint should be marked as **Clients** (select the **Client** check box). This is necessary because Vantagepoint combines clients and vendors into firms.

Salesforce Field Source	Vantagepoint	Notes
Account Name	Firm	Auto-mapped and cannot be changed
Annual Revenue	Annual Revenue	Firm's annual revenue

Salesforce Field Source	Vantagepoint	Notes
Description	Memo	Additional details about the firm, which may include historical information such as when it was founded, location, offices, or industry details.
Employees	Employees	Number of employees at the firm
Industry	Market	The firm's market or industry, such as Healthcare, Engineering or Technology
Parent Account ID	Parent	If this firm has a parent firm, this allows you to keep track of that data.
Website	Website	Firm's website

Add Mapped Fields to the Data Mapping Grid

You can add additional fields that you want to map between Salesforce and Vantagepoint. Use the Data Mapping grid to add mapped fields for opportunities, contacts, and accounts.

To add mapped fields:

- On the Navigation pane in Vantagepoint, select **Utilities » Integrations » Salesforce**.
- Under **Data Mapping**, select the **Opportunity Mapping**, **Contact Mapping**, and **Account Mapping** options to specify the data mapping for each area.
Salesforce fields and Vantagepoint fields in the grid update to reflect each area.
The **Salesforce Field** column displays the standard Salesforce fields that are mapped to the standard Vantagepoint fields as shown in the **Vantagepoint Field** column.
- Click **+ Add Salesforce Field** to add a Salesforce field that you want to map to a Vantagepoint field.
- Specify the Vantagepoint field that you want the Salesforce field to map to.
- Complete one of the following actions:
 - To run the import process immediately, click **Update Now**. This kicks off the import process immediately and then resumes the import process based on the selected interval. For example, if it is 1:00 p.m. and you choose **Update Now** with a 2 hour interval selected, the import process runs at 1:00 p.m. and then again at 3:00 p.m. and every two hours thereafter. **Update Now** is only enabled when **Enable Updates** is set to **Active**.
 - Select **Active** to run the update at the next scheduled time, which is based on the interval that is specified in the **Data Update Options** fields.
Selecting **Active** enables the **Update Now** button. Select this button to run the update immediately.
- Select **Save**.

Troubleshooting

Verify Salesforce Connection Information

When you initially configure the integration for Vantagepoint and Salesforce, you complete the Salesforce form in **Utilities » Integrations » Salesforce**. This enables the Salesforce integration and gives Vantagepoint access to the Salesforce database. You click the **Connect** button on this tab to confirm that the connection between Vantagepoint and Salesforce is working.

If the connection is successful, the following things happen:

- The **Connect** button changes to **Disconnect**. You can click this button at any time to disconnect Salesforce from Vantagepoint.
- A "Salesforce was Successfully Connected" message displays in the top banner.
- The **Data Update Options**, **Advanced Options**, and **Data Mapping** sections are enabled.

If the connection is not successful, the following things happen:

- Failures are recorded in an error log table.
- A "*Connection was not successful*" message displays in the top banner.
- If alerts are configured, Vantagepoint sends a notification center alert to those users with roles impacted by the failure.

Errors Sending Records from Salesforce to Vantagepoint

When an error occurs while sending records from Salesforce to Vantagepoint, Vantagepoint provides multiple methods for communicating the error information. Depending on the configuration, you receive error notifications or email alerts that identify the following:

- Records that were rejected and the cause of the error
- Number of records received
- Number of records rejected
- Number of errors encountered

View Error Notifications

When there are connection errors or issues sending records between Salesforce and Vantagepoint, you can choose to view an error log that provides a detailed explanation of the issues. The types of errors that are listed related to mapped fields, duplicated codes, discrepancies between data, character length issues, required fields, workflows, and authentication errors.

To view Salesforce error notifications:

1. In Vantagepoint, open the Notification Center and click **Salesforce Import/Update Error** to view the issues.
2. Failures are recorded in an error log table. If alerts are also configured, Vantagepoint sends a notification to the users with roles impacted by the failure.

View the Salesforce Integration Error Log

The Salesforce Integration Error Log displays a list of the completed and failed Salesforce import jobs. For each job, you can view the number of records sent and received, information about updated fields, any error messages, and so on.

To view the Salesforce Integration error log:

1. On the Navigation pane, select **Utilities » Integrations » Salesforce**.
2. On the Salesforce form, click the **View Last Error Log** to view details from the most recent error log.

Check Errors in the Process Queue Manager

The Process Queue Manager monitors all data integrations between Vantagepoint and other systems. You can use this to view the status of importing (receiving) opportunities, contacts, and accounts from Salesforce.

The Process Queue Manager screen displays the following information for every integration instance:

- Status of the process
- Description of the process
- Date/Time when the process will be run in the future (Start After)
- Date/Time when the process started (Started)
- Date/Time when the process finished (Finished)
- User who ran the process (Submitter)

To check whether errors occurred while receiving data from Salesforce:

1. On the Navigation pane, select **Utilities » Process Server » Queue Manager**.
2. In the **Queue Filter** section of the Queue Manager form, select the **Failed** check box and then click the **Refresh Queue List** button.
3. In the Queue Process grid, select a failed process row and click **Detail** on the toolbar.
4. On the Process Queue Detail dialog box, select the failed process and then click **Status Log** on the toolbar to view details about the error.

Appendix A: Inline Errors

Inline Missing Required Field

A required field in a record in Vantagepoint is not mapped on the screen when you complete the initial mapping or make a change to the mapping. For opportunities, contacts, and accounts, only the “Name” is required by default.

Also, since you can choose to honor screen designer or workflow required fields, those affected should be treated the same on the mapping screen and do not map a required field:

```
INLINE ERROR: Please map this required field
```

Inline Truncation Warning

A warning for the **Opportunity** field when the Salesforce values are longer than 30 characters and they will be truncated in Vantagepoint:

```
INLINE ERROR: Values will be truncated if longer than 30 characters
```

Appendix B: Import Errors

All import errors follow the same pattern of identifying the record with the error or warning and then listing out the issues. For example:

Opportunity Mobile App. Market Analysis (00641000008HoinAAC) Could not find owner Susie Strongbow (deltek@gmail.com), Column: EstStartDate does not exist.

Missing Mapped Field

The Salesforce Import failed because there is an invalid column. Be sure to update the Data Mapping section in **Utilities » Integrations » Salesforce** by deleting this mapping if you've deleted the Salesforce or Vantagepoint field in order to avoid getting this error again.

Duplicate Code

The record was not imported because it created a duplicate code. Select **Settings » Labels and Lists** to add the field and create a unique code manually. Be sure to update this issue in Salesforce as well if you have selected to update records.

State and Country Discrepancy

The State and Country were not imported due to a discrepancy in the state and country. In Vantagepoint, go to the record to fix the issue. Be sure to update this issue in Salesforce as well if you have selected to update records to avoid recurring errors.

Salesforce field has too many characters

Log: {0}: the value {1} is greater than {2} in length. Value trimmed.”
Record has been truncated to fit within the character limit of the field requirements. Go to **Settings » Labels and Lists** to adjust the record.

Min and Max Errors

This value cannot be greater than {0}” and “This value cannot be less than {0}
Records was not imported because it did not fit within the value limit of the field requirements. Go to **Settings » Labels and Lists** to adjust the record.

Missing Required Field

Log: Please provide a {0}
Record was not imported because it was missing a required field to adjust it, go to **Settings » Labels and Lists**. This applies to required fields and fields that have been made required in the screen designer as well.

Workflow Error

There was an error with workflow upon import.

API Error

The Salesforce version in use does not support web service APIs and the following error occurs:

The Rest API is not enabled for this organization.

Check your Salesforce edition to confirm support of web Service APIs. See this website for information:

<https://www.salesforce.com/editions-pricing/sales-cloud/>

Authentication Error

The Salesforce authentication has failed or is disconnected. Please check the connection on the Salesforce form in **Utilities » Integrations » Salesforce**.

Could not find Owner

Could not find owner {first} {last} ({email}) Could not find an existing employee record. Owner was not imported.

Expired Token

To enable Vantagepoint and Salesforce to communicate, enter your Salesforce token. On occasion, this token may expire and the following error occurs:

Expired access/refresh token.

Click the **Disconnect** button in the **Connect Your Salesforce Instance** field in **Utilities » Integrations » Salesforce**. Click the **Connect** button to reconnect the Salesforce instance with Vantagepoint.

Audit Trail

Information pulled in from Salesforce is added to the audit trail and honors the audit trail import rules.

Appendix C: If You Need Assistance

If you need assistance installing, implementing, or using Vantagepoint, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com