

Deltek® for Professional Services 1.1

Getting Started

April 25, 2018

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Getting Started with DPS

When you first implement DPS, a set of simple Activation and Setup pages walk you through your initial setup decisions.

If you are the DPS administrator for your enterprise, you are responsible for initial Activation and Setup tasks. When you complete the process, your enterprise can begin using DPS for daily activities.

Follow these general steps:

1. Log into DPS. The Activation menu displays at the left side of the Startup page.
2. Complete each Activation step in the same order as the menu. No other users can log into DPS until Activation is completed.
3. Log out after you complete the final step, Activate Organizations.
4. Log back in using the Setup username. The Setup menu displays at the left side of the page.
5. Complete each Setup step in the same order as the menu.
6. Let other users log in and begin their activities.

To take advantage of advanced features and to tailor DPS to the specific needs of your enterprise, you will most likely choose to perform additional setup and integration steps, outside of Activation and Setup. You will perform these steps in the Settings area and in other areas of the DPS software.

Note: If you are the DPS administrator for your company, you can use the cloud administration help system to learn more about your role and responsibilities.

How-to Videos

DPS comes with a library of short videos focused on getting you up and running quickly. Each video is about five minutes long and focuses on a specific DPS task or area. New videos are added regularly.

You can view the videos here, in the online help system, or from the relevant pages in the DPS user interface. For example, you can view the DPS Navigation Tips video from the Getting Started page of any hub.

Types of Videos	Audience	Purpose
General	All users	Learn how to perform common tasks in DPS, including navigating in DPS, completing your timesheet, and using hubs.
Activation	Administrator	View these videos if you are responsible for activating DPS and making key decisions about how your database will be structured, including your work breakdown structure, organization structure, and monetary currencies.

Types of Videos	Audience	Purpose
Setup	Administrator	View these videos if you are responsible for entering initial data into DPS and deciding how DPS features, such as project control, timesheet entry, and billing, will work.
Accounting Setup (Desktop)	Administrator	View these videos if you are responsible for deciding how accounting features will work. For now, you must set up accounting features in the DPS desktop application, not in the browser environment.

General Videos

View these videos to learn how to perform common tasks in DPS, including navigating in DPS, completing your timesheet, and using hubs. These videos are designed for all DPS users.

Title	Purpose
DPS Navigation Tips	This video includes tips to help you successfully navigate DPS, including how to add a record, use list view, select columns, use filters, and perform a simple search. The video also discusses hierarchies.
Time for End Users	Use this video to learn how to complete and submit a timesheet using your computer or mobile device.
Lead Qualification	Use this video to learn how to search for, create, qualify, and disqualify leads.
Set Up Hubs	Use this video to learn what hubs are, how to enter data into hubs manually, and how to quickly find or add a record. The video also introduces the import process, which automates the data entry process.
Use Hubs for CRM	Use this video to learn about the hubs used by CRM users, and how to enter data into hubs manually, import data from outside sources, and quickly find or add a record.

Activation Videos

View these videos if you are responsible for activating DPS and making key decisions about how your database will be structured, including your work breakdown structure, organization structure, and monetary currencies. These videos are designed for DPS administrators.

Title	Purpose
Activation Overview	Use this video to prepare for the activation process and learn about the information that you should gather before you begin.
Work Breakdown Structure Basics	Use this video to learn how to set up a work breakdown structure in DPS that reflects the project numbering system that you currently use.

Title	Purpose
Activate Organizations	Use this video to learn how to set up an organization structure in DPS that reflects how your enterprise is structured and whether you need to track multiple companies.
Activate Multiple Currencies	Use this video to learn how to set up monetary currencies in DPS and enter exchange rates for them.

Setup Videos

View these videos if you are responsible for entering initial data into DPS and deciding how DPS features, such as project control, timesheet entry, and billing, will work. These videos are designed for DPS administrators.

Title	Purpose
Setup Overview	Use this video to prepare for the setup process and learn about the information that you should gather before you begin.
Set Up Hubs	Use this video to learn what hubs are, how to enter data into hubs manually, and how to quickly find or add a record. The video also introduces the import process, which automates the data entry process.
Get Started with CRM for Administrators	Use this video to learn how to navigate through the hubs and set up labels and lists. The video also introduces the import process, which automates the data entry process.
Use Hubs for CRM	Use this video to learn about the hubs used by CRM users, and how to enter data into hubs manually, import data from outside sources, and quickly find or add a record.
Import Data	Use this video to learn how to separate CRM contacts from personal contacts, locate duplicates and remove them, and import contacts into DPS from outside sources.
Set Up Labels and Lists	Use this video to learn how to set up a new custom label, edit an existing label, and edit lists and their drop-down values.
Set Up Project Control	Use this video to learn how to set up projects in DPS, coordinate project activities, monitor project progress, process labor and expense transactions, charge direct and overhead costs to projects, track employee time, generate project reports, and maintain project budgets.
Set Up Time	Use this video to learn how to set up time tracking in DPS, so that employees can enter, submit, and approve timesheets.
Set Up Expense	Use this video to learn how to set up expense report tracking in DPS, so that employees can enter, submit, and approve expense reports.

Title	Purpose
Groups and Categories	Use this video to learn about DPS time and expense groups and categories.
Set Up Billing	Use this video to learn how to set up billing in DPS, including selecting options for preparing and formatting client invoices and tracking revenue and taxes.
Set Up Resource Planning	Use this video to learn how to set up the DPS resource planning module, including selecting options for entering and viewing project, opportunity, and resource plans.
Integration with Salesforce	Use this video to learn how to use the DPS Salesforce Integration module to integrate Salesforce and DPS. Learn how to use existing Salesforce information to create projects in DPS, how to access and report on sales data in one place, and how to use Salesforce information to create estimates.
Outlook Integration	Use this video to learn how to use the DPS Outlook add-in to integrate DPS and Microsoft Outlook.

Accounting Setup Videos (Desktop)

View this video if you are responsible for deciding how accounting features will work. For now, you must set up accounting features in the DPS desktop application, not in the browser environment. This video is designed for DPS administrators.

Title	Purpose
Set Up Accounting	Use this video to learn how to set up accounting processes in DPS. You will use the Settings area of the desktop application.

Initial Log In

The first time you use DPS, you must enter a valid user ID and password. Your welcome email includes a link to the Delttek login page.

To log in:

1. Use your DPS URL to display the login page.
2. Enter **SETUP** in the User ID field.
3. Enter the password included in your welcome email in the Password field.
4. Click **Log In**.
The DPS Getting Started page displays the Activation menu.

Activation

During activation, you make important decisions about how to configure your database.

Activation is a one-time process, and the settings you make are permanent. Complete each step in the order shown on the **Activation** menu on the Getting Started page.

Activate Modules, Accounting Periods, and Fiscal Years

Use the Activate Modules page to verify the DPS applications that you plan to use and to set up your starting accounting period and fiscal year.

To activate modules:

1. Click **Activate Modules**.
2. On the Modules tab of the Activate Modules form, review the list of modules to confirm that it includes all the modules that your enterprise is licensed to use. If any applications are missing, contact Deltek Operations for help.
3. If you are licensed to use the PSA module and you are integrating DPS with QuickBooks, select **Yes** for the **Will your PSA instance integrate with QuickBooks Online** setting below the modules list.
4. If you are licensed to use the Accounting module or PSA module, click the **Fiscal Period** tab.
5. On the Fiscal Period tab:

- If you are licensed to use the Accounting module, enter your starting accounting period and fiscal year.

This is the first accounting period and fiscal year in which you will enter history or process data in DPS.

Assume, for example, that you are setting up DPS in April 2018, and your fiscal year runs from January to December. You may choose to enter historical data for January through March of 2018, so that you can track data and produce reports for the entire fiscal year. In this case, you would enter January 2018 as your first accounting period and 2018 as your first fiscal year. Alternatively, you may decide to enter history for the entire prior year, in which case you would enter January as your first accounting period and 2017 as your first fiscal year.

Once you begin using DPS, you will maintain a calendar of accounting periods, opening and closing periods as the year progresses. To learn more about this process, see the [Accounting Periods and Processing Cycles](#) help topic.

- If you are licensed to use the PSA module and you are integrating DPS with QuickBooks, enter the fiscal year and accounting period in which you will start tracking new project labor and expenses.

You must enter the first and last days of a calendar month for the fiscal year start and end dates and the accounting period start and end dates.

6. Click **Save** and then click **Done Activating Modules**.

Activate Defaults

Use the Activate Defaults page to specify the industry and country in which your enterprise operates and define your coding system for projects.

During the Activation process, you can identify up to three levels of project numbering, although many firms use only one (for example, project) or two (for example, project and phase). For example, you might say that you identify each of your projects using a seven-character code such as 45622.01, in which the first five characters are the main project and the final two represent additional work. The two parts are separated by a period, called a delimiter.

If you already have a project numbering structure, you should probably continue using it. If you are considering a change, consult with your project management and finance teams to be sure that any changes that you make address their needs.

The project number is just one element of the work breakdown structure that your enterprise could use. To learn more about the overall work breakdown structure, see the [Work Breakdown Structure Overview](#) help topic.

To activate your defaults:

1. On the Activation menu, click **Activate Defaults**.
2. On the Industry Defaults tab, in the **Industry** field, select the industry that best matches the work that your enterprise performs, and select your country in the **Country** field.

Based on the industry that you specify, some settings and terminology in DPS automatically change to reflect common industry practices. For example, if you choose Architecture and Engineering Services, DPS uses a chart of accounts that is common to the A/E industry and uses terms such as "project," "project manager," and "client" throughout the user interface.

These settings and terminology are just a starting point. After you complete the Activation process, you can review these default settings and terms and further tailor DPS to your needs. For example, you can use the Label and Lists page in Setup to change the names of specific fields or change the items that are available in drop-down lists. Or you can use the Time page in Setup to modify the default settings for employee timesheets.

3. Click **Use Industry Defaults**.
The WBS (work breakdown structure) tab displays. This is where you specify the structure of your project numbers.
4. Click the **WBS Structure** tab.
5. Set up the work breakdown structure for the way your enterprise manages projects.
If you are using QuickBooks integration with DPS, you can set up work breakdown levels in DPS, but any project data from DPS that is passed to QuickBooks is passed at work breakdown level 1 (project) and not lower levels.
6. Click **Done Activating Defaults**.

Activate Email

Use the Activate Email page to enter email addresses that DPS will use to send automated messages.

You can have DPS send emails to employees and others for administrative and approval processes, including to remind an employee of a task to complete or send someone a report to review.

You may also want to route all of your employees' questions about DPS to a single email address, monitored by your system administrator or another internal product expert.

To activate your email addresses:

1. On the Activation menu, click **Activate Email**.
2. In the **Default Sender Email** field, enter the email address that will display as the "sender" of these automated email messages.
3. Check the **Add DeltekAdmin_ prefix to the Default Sender Email Address** option to add an extra layer of security to the emails that DPS sends automatically. Selecting this option adds the prefix DeltekAdmin_ to the sender's email address, which makes it an email address that cannot receive replies. This practice also prevents spoofing, because only valid emails can come from this appended email address.
4. Enter the help email address in the **Default Help Desk Email** field. This address is used to send automated messages to the DPS Help Desk.
5. Click **Done Activating Email**.

Activate Currencies

Use the Activate Currencies page to identify the monetary currencies that your enterprise uses and to set up exchange rates between currencies.

DPS lets your enterprise track its financial transactions and project performance using multiple global currencies. To learn more about how this works, read the [Multiple Currency](#) help section.

If you enable the multiple currency feature, your database automatically changes so that it can track multiple currencies and exchange rates. Additional fields display in the user interface to prompt you to enter currency-related information. Once these database changes are made, you cannot reverse them. However, you can choose to not enable the multiple currency feature now, but enable it later, after you complete the Activation and Setup process.

To set up one or more currencies:

1. On the Activation menu, click **Activate Currencies**.
2. Select **Yes** or **No** for the question **Do you need to track more than one currency**.
If you are using QuickBooks integration, you can use only one currency, so this question does not display.
3. Use the remaining fields on the Currency tab to enter information about your main currency—the number of decimals to use and its name.

The main (or functional) currency is the currency of the primary economic environment in which your enterprise operates. For example, an enterprise located in France normally

uses the Euro as its main currency. For more information about the different currency types used in DPS, see the [Currency Types](#) help topic.

4. Complete one of the following steps:
 - If you use only one currency, click **Done Activating Currencies** to complete and exit the currencies activation. You do not need to complete steps 5-10.
 - If you use multiple currencies, click **Enable Multicurrency**, confirm your choice, and continue with steps 5-10.

5. Click the Multicurrency tab and click **+ Add Currency**.

6. Enter each currency that you use and click **Save**.

7. Click the Exchange Rates tab and click **+ Add Exchange Rate**.

8. Select a pair of currencies, enter an effective date, and enter an exchange rate.

You do not need to enter information for one pair of currencies (for example, US Dollars to Yen) and also enter information for its inverse (Yen to US Dollars). In fact, doing so can cause incorrect results. Instead, enter information for one exchange (for example, US Dollars to Yen) and let DPS automatically calculate the inverse (Yen to US Dollars). For more information about how exchange rates work in DPS, see the [Exchange Rates Overview](#) help section.

Repeat this process for multiple currency pairs. You can also switch back and forth between these tabs, entering currencies and setting up exchange rates.

9. Click **Save**.

10. Click **Done Activating Currencies**.

Activate Organizations

Use the Activate Organizations page to provide information about the structure of your enterprise, including your companies and your "organizations" or business units.


To set up your organizational structure:

1. On the Activation menu, click **Activate Organizations**.
2. If you are licensed to use the PSA module and you are activating DPS with QuickBooks integration, enter the name of your company on this page and continue with step 11 below. Otherwise, continue with step 3.
3. Select **Yes** or **No** for the question **Do you have multiple companies**.
If you select **Yes**, you set up your main company now, and then set up additional companies after the Activation and Setup process is complete.
4. Select **Yes** for **Do you have Profit Centers or Business Units that require their own income statements** if your enterprise is made up of separate organizations; otherwise, answer **No**.

DPS provides the framework for tracking multiple "organizations" in your company. These separate organizations are business units that incur expenses and/or generate revenue. For example, if your company is divided into regions and offices, you may create a separate organization for each region and office and maintain information for each of these segments of your business. To learn more about how this works, see the [Organization Reporting Overview](#) help section.

5. Enter the name of your main company.
6. Select the number of levels of organizational structure that you need.

Depending on the size and complexity of your enterprise, you can create a fairly simple or more complex organization structure. To learn more about organization levels, see the [Organization Reporting Structure](#) help topic.

If you have multiple companies, your companies are automatically considered to be the first level. So, if you have multiple companies and also want to track branch offices and disciplines, you need a three-level organization structure.
7. Enter the singular and plural names for the levels in your organization.
8. Click **Activate** to update the database to reflect your organization structure. The Level Values and Combinations tabs display. Use these tabs together to identify the specific business entities you want to track.
9. Click **Level Values** and enter all of the valid values for the organization you want to define.
For example, if you have two levels, Office and Studio, list all of your offices and all of your studios. Assign a two-character code to each of the values (for example, BA for Buenos Aires or BR for Branding).
10. Click **Combinations** and identify valid combinations of these values.
For example, if you have two levels, Offices and Studios, identify valid combinations, such as Paris/Branding, Paris/Consumer and New York/Tech. If your Paris office does not have a Tech studio, do not enter that combination.
11. Activate Organizations is the last step in the activation process. If you want to review or change any of your prior activation settings, do this now.
Note: After you click **Done Activating Organizations**, you cannot change any of the activation settings you selected.
12. When you are satisfied that your activation entries are complete, click **Done Activating Organizations**.
13. Click  and then click **Log Out**.

Activation is now complete. Continue with the setup process to enter information about your projects, employees, and finances.

Setup

During the Setup process, you define policies and processes for common DPS functions.

Setup allows you to get up and running quickly. Setup areas are located in both the DPS browser and the desktop applications. Depending on the modules you use, you may need set up modules in both applications. You set up most modules in the browser; but you set up Accounting and Purchasing & Inventory in the desktop.

Set Up Project Control

Use the Project Control Setup forms to enter information about how your enterprise tracks labor and overhead and applies these costs to projects.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Time Analysis	<p>Use this form to set up the Time Analysis report, which lets you review how your employees are using their time. You can view employee time from several perspectives, using comparisons of direct time, indirect time, and total time worked. An analysis of indirect time helps you monitor paid time off and control non-billable time.</p> <p>See the Time Analysis help topic for more information.</p>
Options	Use this form to indicate if you want to enter project fee information at all work breakdown structure (WBS) levels or only at the lowest WBS levels.
Labor Posting	<p>Use this form to set up direct and indirect labor accounts associated with specific labor types, such as Employee, Management, and Principal. When an employee charges time to a regular or indirect project, the labor cost is charged automatically to the appropriate account.</p> <p>Use the Override Labor Accounts section to set up exceptions to these rules.</p> <p>See the Labor Types Settings Overview help topic for more information.</p>
Absence Accruals	<p>Use this form to identify the absence accruals (vacation, sick leave, etc.) that your enterprise tracks for its employees. For each absence accrual, you specify if you want to show the accrual balance on employee timesheets and if you want to set up an absence request approval process and, if so, the employee who is the approval administrator. You also set up a project of range of projects for each accrual.</p> <p>See the Accruals Processing Overview help topic for more information.</p>
Overhead Allocation	<p>Use this form to define how the costs accumulated in overhead projects (such as vacation pay, sick time, rent, utilities, office supplies, and administration) will be distributed to regular, revenue-producing projects.</p> <p>See the Overhead Allocation help topic for more information.</p>

Set Up Time

Use the Time Setup forms to make decisions about how employee time will be tracked and how timesheets will be formatted.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how employee timesheets will work, including the increments in which time can be tracked, whether employees can enter overtime hours, and whether an employee signature is required. See the Timesheet Overview help topic for more information.
Time Periods	Use this form to set up timesheet periods. Employees must enter a timesheet for each timesheet period.
Non-Work Days	Use this form to identify the days of the week and the holidays on which employees are not expected to work.
Time Groups	Use this form to set up time groups to distribute timesheet administration responsibilities among different administrators. For example, you can use time groups to bring together employees who share the same job function, work in the same department, or work in the same office. After you set up a time group, you can assign employees to it.
Time Approvals	Use this form to determine if you will use an approval workflow to have leaders approve employee timesheets. You can choose among several different workflow options. See the Approvals Center help area for more information about approval workflows.
Time Categories	Use this form to specify that certain common time categories, such as vacation and administration, should display automatically on timesheets, to save employees time. You can have a time category display on timesheets for all employees or for only those who belong to specific time groups.

Set Up Expense

Use the Expense Setup forms to make decisions about how employee expense reports will be tracked.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how employee expense reports will work, including whether employees can enter advances on their expense reports and whether an employee signature is required. See the Expense Reports help topic for more information.
Groups	Use this form to set up expense groups to distribute expense report administration responsibilities among different administrators. For example, you can use expense groups to

Form	Description
	bring together employees who share the same job function, work in the same department, or work in the same office. After you set up an expense group, you can assign employees to it.
Categories	<p>Use this form to specify that certain common expense categories, such as hotels, meals, and airfare, should display automatically on expense reports, along with the correct accounting and billing information.</p> <p>You can have an expense category display on expense reports for all employees or for only those who belong to specific expense groups. See the Expense Categories help topic for more information.</p>
Payments	Use this form to determine the format of employee expense checks and remittance advices, as well as the bank account that they will be drawn upon unless a different bank is chosen.
Approvals	Use this form to determine if you will use an approval workflow to have leaders approve employee expense reports. You can choose among several different workflow options. See the Approvals Center help area for more information about approval workflows.

Set Up Billing

Use the Billing Setup forms to make decisions about how your clients will be billed.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	<p>Use this form to make basic decisions about how clients will be billed, including how invoices are formatted and numbered, whether retainers and retainage are tracked, and whether you use an invoice approval workflow.</p> <p>See the Retainers, Retainage Overview, and Invoice Approval Overview help topics for more information.</p>
Invoice Accounts	<p>During final invoice processing, invoice transactions are charged to general ledger revenue accounts. Use this form to specify the default revenue account for each section of your invoice. For example, specify the revenue account associated with fee billings.</p> <p>Also use this tab to enter the label that will appear above each invoice section.</p>
Labor Categories	Use this form to define a master list of labor categories and related standard billing rates. Labor categories are standard staff

Form	Description
	roles on projects (for example, Principal, Project Manager, or Supervisor). In the Employees hub, you can associate each employee with a default labor category. You can use labor category rates to invoice new projects. If you use the Resource Planning module, you can use these rates to set up plans for new projects. (If DPS is set up to use both multiple companies and multiple currencies, this form is not available.)
Taxes	Use this form to set up the taxes that you need to calculate and include on invoices. For each tax, specify the tax rate, the invoice sections to which it should be applied (labor, expense, fees, and so on), and the general ledger account to which the tax is charged.

Set Up Resource Planning

Use the Resource Planning Setup forms to make decisions about how you will use the Resource Planning application.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Plan Settings	<p>Use this form to make basic decisions about how you will use Resource Planning, including whether you will plan consultant and non-consultant expenses, and what overhead rate you will apply to planned projects.</p> <p>Select Yes for the Enable Expense Planning option if you want to be able to enter plan data for expenses. You can enter plan data for direct, indirect, and reimbursable expenses.</p> <p>Select Yes for the Enable Consultant Planning option if you want to be able to enter plan data for consultants. You can enter plan data for direct and reimbursable consultants.</p> <p>In the Starting Day of the Week field, select the first day in your work week.</p> <p>Enter the default target labor cost multiplier. The target multiplier represents how much revenue is anticipated for each labor cost dollar spent on a project. It is commonly used as the basis for evaluating the EAC labor cost multipliers as projects move forward.</p> <p>In the Overhead % field, enter the default overhead percentage for plans, as a whole number. For example, enter 10 for 10 percent. A user with the necessary security rights will still be able to enter different percentages for individual projects and opportunities.</p>

Form	Description
	If the Resource Planning module is activated but the Accounting module is not activated, select the character (a period, for example) that you want to use as the delimiter between WBS levels in project numbers.
Rates	Use this form to specify whether planned amounts should be based on cost rates, billing rates, or both. Later, you will need to provide additional information about cost and labor rate methods, tables, and multipliers.
Resource Settings	<p>Use this form to specify:</p> <ul style="list-style-type: none"> Utilization Thresholds: These are the low and high utilization percentages within which an employee is considered fully utilized. Example: You set the lowest percentage to 95 and the highest percentage to 105. If an employee's target utilization is 80 percent, that employee is considered properly utilized for a given period if their utilization is between 76 percent ($.95 \times 80$) and 84 percent (1.05×80). She is underutilized if her utilization is below 76 percent and overutilized if it is above 84 percent. Scheduled Thresholds: These are the low and high scheduled percentages within which an employee is considered fully scheduled. Example: You set the lowest percentage to 95 and the highest percentage to 105. If an employee's available hours for a week is 40, that employee is considered properly scheduled if they are scheduled for between 38 hours ($.95 \times 40$) and 42 hours (1.05×40). He is underscheduled if his scheduled hours are less than 38 and overscheduled if they are more than 42. Soft and Hard Booking: This is an option to tentatively plan, or "soft book" assignments, then "hard book" them when they are confirmed. The soft and hard book feature enables you to distinguish between tentative or placeholder resource assignments and those confirmed or approved assignments that you consider a permanent part of the plan. When you generate planning reports, you can filter those reports to include or exclude assignments based on booking status if you include the Booking column on the report.
Labor Categories	Use this form to define a master list of labor categories and related standard billing rates. Labor categories are standard staff roles on projects (for example, Principal, Project Manager, or Supervisor). In the Employees hub, you can associate each employee with a default labor category. You can use labor

Form	Description
	category rates to invoice new projects. If you use the Resource Planning module, you can use these rates to set up plans for new projects. (If DPS is set up to use both multiple companies and multiple currencies, this form is not available.)
Non-Work Days	Use this form to identify the days of the week and the holidays on which employees are not expected to work. When DPS spreads planned hours for you in Resource Planning, non-work days and holidays are allocated no hours, but planners can still assign planned hours to them.

Set Up CRM

The CRM Setup page guides you through the multiple-step process of setting up your CRM processes, data, and user access.

This page walks you through the four main CRM setup steps and suggests videos and other learning resources for each of the steps.

You will perform the CRM setup steps throughout DPS, not just on this page.

Step	Description
Make a plan	<p>Before you do anything, gather key stakeholders to discuss your goals for using DPS CRM and how you will achieve those goals. Discuss the data that you will bring into DPS from others sources, the terminology that you will use, and the workflows that you will establish.</p> <p>See the CRM Overview help topic for more information.</p>
Set up your processes	<p>Set up the framework for your CRM system, including establishing workflows, establishing terminology, and choosing the values that are available from drop-down lists. If you plan to integrate DPS CRM with Salesforce, set up the integration process.</p> <p>See the Workflow Configuration Overview help topic for more information.</p>
Set up your hubs	<p>The "hubs" area of DPS is the place where you store key data about your projects, employees, and more. As part of setting up CRM, you enter data about the firms (vendors and clients) with which you work, your contacts, your opportunities, and your marketing efforts. You will probably import this data into DPS from information sources that you already maintain.</p> <p>See the Hub Records help topic for more information.</p>
Empower your users	<p>Identify the employees who will use DPS CRM and give them appropriate security access to the CRM applications. See the Security Configuration Overview for more information.</p>

Set Up Labels and Lists

Use the Labels and Lists Setup form to set up the terminology used in the CRM application and the values that will be available from drop-down lists.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Labels	<p>During the Activation process, you identified the primary industry in which your enterprise operates. Based on this industry choice, your DPS database was updated to use industry-specific terminology.</p> <p>Now, on the Labels form, you can further customize terminology. For example, you might change the term "Employees" to "Team Members," "Associates," or "Specialists."</p>
Lists	<p>Throughout DPS, your users will make choices from drop-down lists. For example, your business development staff will select a value from the Proposal Status field to identify the current state of a proposal.</p> <p>Here, on the Lists form, you can review the values that are pre-set for these drop-down lists. (In the case of Proposal Status, for example, these values are In Progress, In Review, and Submitted.) You can change the default values to better reflect your business needs, add new values, and remove values you do not want.</p>

Set Up Accounting

Use the Accounting page to review and modify your accounts, establish your bank accounts, and set parameters for accounting postings.

Set up Accounting in the desktop application. Accounting has multiple menu options, each focused on a different area. The fields are pre-populated with default entries based on the options you selected during activation. We recommend you keep the default settings in each area, but you may need to change items that need to be specialized for your enterprise.

Review the default settings in each area and update any fields as needed. You can modify any fields and implement advanced features later in DPS Settings after the setup process is complete.

Menu Item	Description
Chart of Accounts	<p>Use this option to review the preset default accounts for your firm. You can rename, add, or delete accounts.</p> <p>See the Chart of Accounts Settings help topic for more information.</p>
Company	Use this option to review and update the default settings.

Menu Item	Description
	See the Accounting Company Settings help topic for more information.
Taxes	Use this option to set up the tax codes that are used to calculate taxes throughout DPS. See the Tax Code Settings help topic for more information.
Banks	Use this option to set up the bank codes your enterprise uses. See the Bank Codes Setup help topic for more information.
Company AP	Use this option to set up company-wide accounts payable features, including default payment terms, liability codes, vendor types, and discount codes. See the Company Accounts Payable Settings help topic for more information.
Accounts Receivable	Use this option to set up the AR Ledger report and to set up mapping accounts for invoices and accounts receivable. See the Accounts Receivable Settings help topic for more information.

Set Up QuickBooks Integration

You set up the QuickBooks integration with DPS using the QuickBooks integration utility in DPS.

To open the utility, select **Utilities » Integrations » QuickBooks** in the DPS Navigation pane. You can use this utility when you log in to DPS with your setup credentials to initially activate and set up DPS, or use it when you log in after the initial setup to complete or modify the QuickBooks integration setup. The same QuickBooks form, tabs, and settings are included in the utility whether you use it during the initial DPS setup or after the initial setup.

For the integration setup, you connect DPS with QuickBooks Online, enter other integration settings, and mapping certain records.

Before you can connect DPS with QuickBooks Online, you must first do the following:

- [Create an Intuit Developer Account](#)
- [Create an Intuit App for DPS](#)

Then complete the settings on the tabs in the QuickBooks integration utility.

Tab on the QuickBooks Form	Description
Integration Setup	Use the settings on this tab to: <ul style="list-style-type: none"> ▪ Enable QuickBooks integration. ▪ Connect DPS with QuickBooks Online.

Tab on the QuickBooks Form	Description
	<ul style="list-style-type: none"> Schedule how often to automatically update the data between the two products. Enter advanced and default settings.
Accounts Mapping	Use this tab to review and map the general ledger accounts that are linked between DPS and QuickBooks Online.
Tax Code Mapping	Use this tab to review and map the tax codes that are linked between DPS and QuickBooks Online.
Employee Mapping	Use this tab to link an employee record with a corresponding vendor record so you can pay an employee in QuickBooks Online for expenses entered in an expense report in DPS.

For more information about each tab in the QuickBooks integration utility and how to complete the setup, see [QuickBooks Integration Utility](#).

Set Up Integrations


Use the Integrations Setup forms (**Utilities » Integrations**) to set up integrations between DPS and other software products and to import data into DPS from a spreadsheet or other CSV file.

Each of the integration forms focuses on a different type of integration.

Form	Description
Ajera	Use this form to set up integration between DPS and Ajera. This tab has just one check box, Enable Ajera Synchronization .
API Authorization	<p>Use this form if you are licensed to use the Resource Planning module and want to use any APIs to import data from other applications into the DPS database.</p> <p>Click Generate Secret to generate the Client ID and Client Secret.</p>
GovWin IQ	Use this form to set up integration between DPS and GovWin IQ, a Deltek service that helps companies find government contract opportunities.
Kona	Use this form to set up integration with the Kona collaboration and communication tool. Before you perform this step, you must obtain a Client ID and Client Secret from Deltek.
Salesforce	<p>Use this form to set up integration between DPS and Salesforce, including the rules that will control which data is shared between the two applications, when it is shared, and how data is mapped between the two applications.</p> <p>See the Salesforce Integration help topic for more information.</p>
Maconomy	Use this form to configure APIs to connect your Maconomy instance to DPS. This allows you to integrate Maconomy

Form	Description
	information with DPS and synchronize user-defined fields and workflow data.
VAT Registrations	Use the VAT Registrations form to configure the subscription license for DPS to use the vatlayer API system to validate European Union VAT numbers.





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