

GovWin Opportunity Manager to Vision CRM Integration 1.0

Release Notes

April 18, 2014

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Overview

Welcome to the GovWin Opportunity Manager to Vision CRM Integration Release Notes.

For this initial release, these release notes contain a brief overview of the product. For subsequent releases, the release notes will provide one or more of the following:

- Pre-installation steps
- Enhancements
- Software issues resolved
- Known issues

For Additional Information

Customer Care Connect Site

The Deltek Customer Care Connect site 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 Customer Care Connect site provides:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes



For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and Password.
3. Click Log In.



If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Available Documentation for this Release

The following table lists the Deltek documentation available for this release. Except where noted, the guides listed in this table are available for download from the Deltek Customer Care Connect site.

Document Name	Description
GovWin Opportunity Manager to Vision CRM Integration Installation Guide	This guide provides instructions for downloading and installing GovWin Opportunity Manager to Vision CRM Integration.
GovWin Opportunity Manager to Vision CRM Integration User Guide	This guide provides information about setting up and using GovWin Opportunity Manager to Vision CRM Integration.

Product Overview

GovWin Opportunity Manager to Vision CRM Integration enables you to integrate Vision CRM with GovWin Opportunity Manager so you can apply the Vision opportunity tracking and reporting capabilities to the opportunities that you gather in Opportunity Manager.

Integration Features

GovWin Opportunity Manager to Vision CRM Integration enables you to import opportunities from Opportunity Manager into Vision.

In Opportunity Manager, you flag opportunities you want to import into Vision simply by clicking the **Add to Deltek CRM** link for each opportunity.

The import process is initiated from Vision using the Opportunity Web Service utility (**Utilities » Advanced Utilities » Opp Manager Web Service**), either by scheduling the import for processing (after business hours, for example) or by running it manually as needed. This batch process imports all opportunities currently flagged for import. When the data transfer is complete, information about the transfer process (date and time, number of new records, number of update records, and so on) displays in the Web Service Calls - Log grid on the General tab of the Opportunity Web Service utility.

When you import a new opportunity, the utility creates a record for it in the Opportunity Info Center. The opportunity name, description, and date opened are displayed on the General tab of the Opportunity Info Center, and the rest of the transferred data is displayed on the Opp Manager tab. That data is for display only and cannot be changed in Vision.

In addition to importing new opportunities, you can also configure the integration to update opportunities that were previously imported into Vision if the information in Opportunity Manager changes.

Installation and Configuration


The basic steps for implementing GovWin Opportunity Manager to Vision CRM Integration are the following:

- Download the application from Deltek Software Manager.
- Install the application.
- Run a database script to add the columns and grids for the Opp Manager tab to your Vision database.
- Use the Navigation Tree Designer in Vision to add the link for the Opportunity Manager Web Service utility to the navigation tree.
- Use the Configuration tab of the Opportunity Manager Web Service utility to enter and test the required connection information.

For More Information

For more information on configuration and on running the import process, refer to the *GovWin Opportunity Manager to Vision CRM Integration Users Guide*.

For installation prerequisites and instructions, refer to the *GovWin Opportunity Manager to Vision CRM Integration Installation Guide*.



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