Deltek Vision® 7.x Desktop and Microsoft Office® Integration Quick Reference Card

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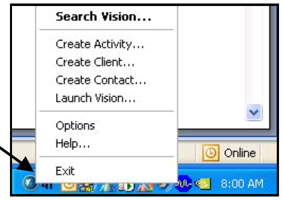
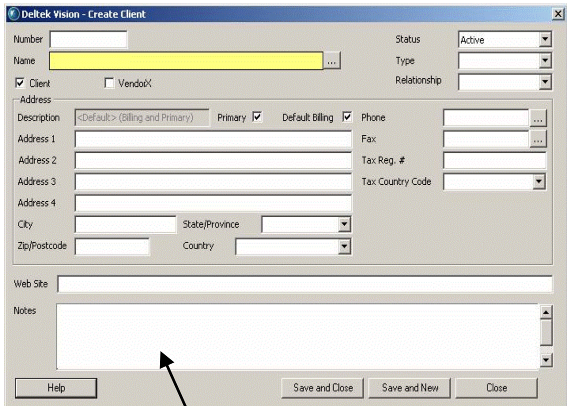
Use the **Vision** drop-down menu or Windows System Tray icon to access the Vision Desktop and Microsoft Office Integration options.

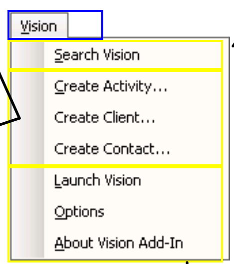




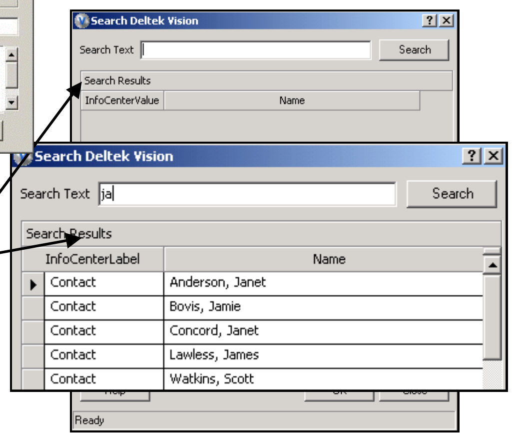
Create Activity - launches the Vision New Activity dialog where you can enter and save a new Vision activity.

Create Client - launches the Vision New Client dialog where you can enter and save a new Vision client.

Create Contact - launches the Vision New Contact dialog where you can enter and save a new Vision contact.



Use the Search Vision feature to search the Info Center database for specific records. Enter the text you are searching for and click **Search**. Vision displays the matching records. Double-click on the desired entry to jump to the associated Vision Info Center record.



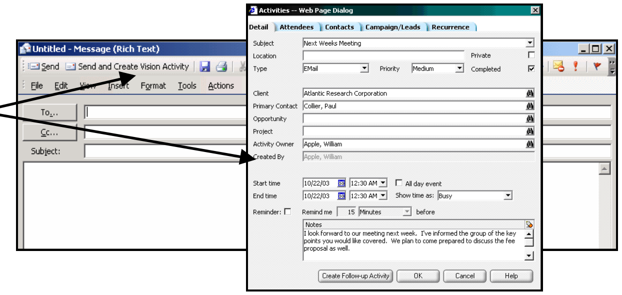
Launch Vision - launches the Vision application from the desktop.

Options - launches the Vision Integration Options dialog. The Vision administrator uses this function to configure the Vision Desktop and Microsoft Office Integration features.

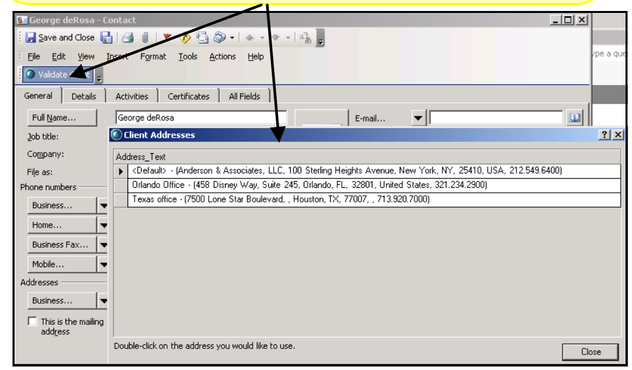
About Vision Add-In - view the Vision Desktop and Microsoft Office Integration system information.

Create the email message in Outlook, and click the **Send and Create Vision Activity** button. This automatically creates a Vision activity that is attached to both the client and the associated contact.

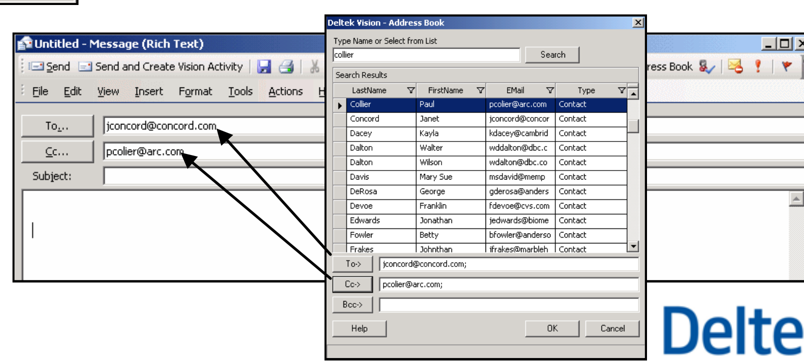
After you receive an email, click the **Create Activity** button to create a Vision activity automatically that is attached to both the client and associated contact. You may also link the email to projects



When adding new Outlook contact records, use the **Validate Contact** feature to check for related client company information in Vision. If your new record's company already exists in the Vision database, Vision automatically places the company's information in the new record. This ensures that data is accurate between the two applications. For clients with multiple addresses, you may select the appropriate address.



Vision contacts and leads are automatically shared with Outlook in a global address list. In Outlook, click the **Vision Address Book** button to choose Vision Contacts and Leads as the recipients of your email. Select the name(s) of the email recipient(s) from the Search Results and click **To>, Cc>,** or **Bcc>** as needed. Click **OK**. The Outlook Message dialog box displays again, with the name(s) in the appropriate recipient fields.



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