Touch CRM for Deltek Vision 1.1

User's Guide

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Contents

Overview

Touch CRM for Deltek Vision is a mobile application that enables you to view, add, and edit client, contact, and opportunity information for Vision from your touch screen device. Touch CRM supports both iOS and Android devices.

This document contains detailed information and instructions on how to use various features of Touch CRM.

Touch CRM for Deltek Vision works with Vision 7.0 SP1 Hotfix #6 and Vision 7.1.

If you are running Touch CRM for Vision 1.1 on a Touch CRM 1.0 server, you will not be able to access the Opportunities and User-Defined Fields (UDF) features. Your firm must upgrade to Touch CRM 1.1 server to be able to access these features.

If You Need Assistance

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

Customer Services

For over 20 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 Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- 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
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions

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 do not have a username and password for the Customer Care Connect site, contact your firm's Touch CRM administrator.

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

Log In/Out

Use the information in this section to log into Touch CRM and set up PIN security.

Touch CRM does not support LDAP authentication in a multiple domain environment.

Log into Touch CRM

1. If this is your first time to access the app, tap **Terms and Use of Service** and then tap **I accept these terms**.
2. Use the **Usage tracking enabled** slider to enable or disable usage tracking and then tap **I accept these terms**. Usage tracking keeps a record of the number of times you accessed Touch CRM and the features that you used.

   Usage tracking does not track any personally identifiable data or confidential information such as client and contact names.

3. Tap the **Login ID**, **Password**, and **Database** fields to enter/select the corresponding values and then tap **Login**. Consult your Vision administrator for the required information.
4. On your first login, take one of the following actions.
   - To create a PIN, enter a four-digit security PIN. Re-enter it to confirm your PIN. The next time you log in, use this PIN instead of your login ID and password.
   - To skip PIN creation, tap **Skip PIN Setup**. You then have to enter your password when you use the app in the future. You can enable PIN security in the Settings page.

   If you use Windows authentication to access Touch CRM for Vision, you are required to enter a PIN. You cannot skip PIN creation in this case.

Enter a PIN Instead of a Password

If you created a PIN when you log into Touch CRM for the first time, you can use that PIN to log into the app instead of your login ID and password.

If you close the app and re-open it from the Home Screen or Task Bar, you will be taken to the last screen that you accessed and you do not need to enter your PIN or password. If your session has timed out, you will be prompted to enter your PIN or password the next time a server call is made (the app communicates with Vision).

Invalid Login Attempt

You will receive an ‘Invalid login attempt’ message when:

- You entered an invalid login ID, password, or PIN.
- Your account is inactive.

Log Out of Touch CRM

When you log out of Touch CRM, your settings are saved. These are retrieved when you log into the app again with your password or PIN.

1. Tap **More » Settings**.
2. Tap **Log Out**.

Log Out and Clear App Settings

When you use Touch CRM's 'Forget me from device' feature, all data related to the app are deleted from your device. To access your account again, you must re-enter your URL, username, password, and database. You will not be able to retrieve your previous settings. Deltek recommends that you use this only when you want to access another user account or change databases.

1. Tap **More » Settings**.
2. Tap **Forget me from device**.

Screen Display

Touch CRM consists of the following features, which you access using the tab bar at the bottom:

- **Clients** — Use this feature to search, view, add, edit, or delete client records.
- **Contacts** — Use this feature to search, view, add, edit, or delete contact records.
- **Opportunities** — Use this feature to search, view, add, edit or delete opportunities.
- **Settings** — Use this feature to configure Touch CRM settings.

Field Indicators

Several indicators mark the fields on the screen when you add/edit records or configure settings. They are as follows:

- **Required** — You must enter a value in this in order to continue a task. This field is marked with an asterisk (*).
- **Editable** — This field allows you to enter a value. This field is marked with when you enter a value. Tap to clear the field.
- **Read Only** — This field only displays information and is not editable. This field is grayed-out to indicate that you can only view the information it contains.

Links

Links are displayed as underlined blue text. Each link functions differently depending on the information it contains. Tap a link to activate these functions:

- **Telephone/Mobile/Fax Number** — prompts your device to call the number. If your device does not have call capabilities, such as tablets, it opens a context menu where you can choose to add the phone number to your device's contact list or copy the information to the clipboard.
- **Address** — Opens your device's default browser to go to your device's default map app and display the location of the address.
- **Email Address** — Opens your device's email message composer where the email address is automatically added as a recipient.

User-Defined Fields

Touch CRM is compatible with user-defined fields (UDF) used in Vision. The following UDFs are accessible in Touch CRM.

- Lookups that already exist
  - Employees
  - Contacts
  - Clients
  - Organizations
- Non-lookups
  - Characters

- Dates
- Numeric values
- Drop-down options
- Currencies
- Checkboxes
- Memos
- URLs

If you are running Touch CRM for Vision 1.1 on a Touch CRM 1.0 server, you will not be able to access User-Defined Fields (UDF). Your firm must upgrade to Touch CRM 1.1 server to be able to access this feature.

Clients

The Clients screen enables you to view client information as well as add, edit, or delete client records.

Touch CRM honors Vision role security. Thus, you have the same access rights (read, edit, add, delete, etc.) to client records in Touch CRM as you do in Vision. Contact your Touch CRM administrator for support.

View Client Records

To view a client record, enter the client name or number in the **Search** field and then tap **Search** on the keyboard. All client records that have a name, number, or alias containing your search entry display on the screen.

To display all available client records, tap the Search field to display the keyboard and then tap **Search** without using a search entry.

Touch CRM displays 25 client records at a time. To display the next set of client records, scroll to the bottom of the screen and then tap **More**.

Client Information

The following table lists the information that displays on the Clients screen.

Client Info	Description
Type	Displays the business classification of the client.
Notes	Displays miscellaneous information about the client.
Address	Displays the primary address of the client.
Address List	Lists the client's addresses. **Primary** indicates that the address is the default address for the client.
Contacts	Lists all the contacts that are linked to the client.
Activities	Lists all the activities that are linked to the client.
Projects	Lists all the projects that are linked to the client.
Opportunities	Lists all the opportunities that are linked to the client.
Employees	Lists all the employees that are linked to the client.

The **Contacts**, **Activities**, **Projects**, and **Employees** fields will be fully functional in future releases.

Filter Client Records

When viewing client records, use the tabs on the top of the screen to filter client records as follows:

- **All** — Tap this tab to view all client records that match your search entry.
- **Mine** — Tap this tab to view all client records associated with your employee record.
- **Recent** — Tap this tab to view the 25 most recently accessed client records.

Add a Client

1. Tap to display the Add Client screen.
2. Enter name of the client in the **Name** field and then tap **Next**.

   If the client name you entered is similar to an existing client record, Touch CRM lists those client records.

   - To append an existing record, select the client record from the list.
   - To create a new record, tap **Add New Client**.

3. Tap beside the **Type**, **Number**, **Relationship**, and **Status** fields to edit the client's information.
4. Enter the client's information in the following fields:
   - **Type** — Select a business classification for this client.
   - **Number** — Enter the company's number.
   - **Relationship** — Select the appropriate value describing your relationship with the client. .
   - **Status** — Select if this client is active, dormant, or inactive.
5. Tap **Done**.
6. (Optional) Tap the **Notes** field to enter additional information about the client. Tap **Done** when you finish.
7. Tap the **Add Address** field, then tap on the Primary Address screen to enter an address of the client.

   After you create an address, you cannot change the address description using Touch CRM.

8. Tap **Done** on the Add Client Address screen, then tap **Back** on the Primary Address screen to return to the Add Client screen.
9. Tap **Save** on the Add Client screen. The client record is automatically associated with your employee record.

Edit a Client Record

1. Search for the client record to edit.

2. Tap the client record and then tap **Edit**.
3. Tap › in the fields to edit.
4. Modify the necessary information and then tap **Save**.

Known Issue: On Android 2.x devices, all formatting is lost when you edit the **Notes** field. This is a limitation with that particular operating system.

Delete a Client Record

1. Search for the client to delete and then tap **Edit**.
2. Tap **Delete Client**.
3. Tap **Delete Client** to confirm the deletion.

Contacts

The Contacts screen enables you to view contact information as well as add, edit, or delete contact records.

Touch CRM honors Vision role security. Thus, you have the same access (read, edit, add, delete, etc.) to client records in Touch CRM as you do in Vision. Contact your Touch CRM administrator for support.

View Contact Records

To view a contact record, enter the contact name or the client name of the contact in the **Search** field and then tap **Search** on the keyboard. All contact records associated with your search entry display on the screen.

To display all available contact records, tap the Search field to display the keyboard and then tap **Search** without using a search entry.

Touch CRM displays 25 contact records at a time. To display the next set of contact records, scroll to the bottom of the screen and then tap **More**.

Contact Information

The following table lists the information that displays on the Contacts screen.

Contact Info	Description
Business Phone	Displays the contact's business phone number.
Bus. Fax	Displays the contact's business fax number.
Mobile	Displays the contact's mobile phone number.
Home	Displays the contact's home phone number.
Pager	Displays the contact's pager number.
Email	Displays the contact's email address.
Notes	Displays miscellaneous information about the contact.
Business	Displays the business address of the client associated with the contact.
Home/Other	Displays the contact's home or alternative address.
Activities	Lists all activities linked to the contact.
Projects	Lists all projects linked to the contact.
Opportunities	Lists all opportunities linked to the contact.

Contact Info	Description
Employees	Lists all employees linked to the contact.

The **Activities**, **Projects**, and **Employees** fields will be fully functional in future releases.

Filter Contact Records

When viewing contact records, use the tabs on the top of the screen to filter contact records as follows:

- **All** — Tap this tab to view all contact records that match your search entry.
- **Mine** — Tap this tab to view all contact records associated with your employee record.
- **Recent** — Tap this tab to view the 25 most recently accessed contact records.

Add a Contact

1. Tap to open the Add Contact screen.
2. Tap the **First Name**, **Last Name**, and **Email** fields to enter the corresponding information.
3. Tap beside the **Client** field then select a client to associate with the contact.

You must provide information on at least two of the **First Name**, **Last Name**, **Email**, or **Client** fields. This information is used to search for existing contact records to prevent you from entering a duplicate record.

If the contact name you entered is similar to an existing contact record, Touch CRM for Vision lists those contact records.

- To append an existing record, select the client record from the lists.
- To create a new record, tap **Add New Contact**.

4. Tap **Next**.
5. Tap the fields to enter or select the appropriate information about the contact (see Contact Information), then tap **Save**. The contact record is automatically associated with your employee record.

Edit a Contact's Information

1. Search for the contact record to edit.
2. Tap the contact record and then tap **Edit**.
3. Edit the necessary fields and then tap **Save**.

Delete a Contact Record

1. Search for the contact to delete and then tap **Edit**.
2. Tap **Delete Contact**.
3. Tap **Delete Contact** to confirm the deletion.

Opportunities

The Opportunities screen enables you to view contact information as well as add, edit, or delete opportunities.

If you are running Touch CRM for Vision 1.1 on a Touch CRM 1.0 server, you will not be able to access the Opportunities feature. Your firm must upgrade to Touch CRM 1.1 server to be able to access this feature.

Touch CRM honors Vision role security. Thus, you have the same access rights (read, edit, add, delete, etc.) to opportunity records in Touch CRM as you do in Vision. Contact your Touch CRM administrator for support.

View Opportunity Records

To view an opportunity, enter the opportunity name in the **Search** field and then tap **Search** on the keyboard. All opportunity records associated with your search entry display on the screen.

To display all available opportunity records, tap the Search field to display the keyboard and then tap **Search** without using a search entry.

Touch CRM displays 25 opportunities at a time. To display the next set of opportunities, scroll to the bottom of the screen and then tap **More**.

Opportunity Information

The following table lists the information that displays on the Opportunity screen.

Opportunity Info	Description
Title	Displays the opportunity title.
Opp Number	Displays the opportunity number.
Description	Displays a brief description of the opportunity.
Organization	Displays the organization in your firm that is responsible for pursuing the opportunity.
Client	Displays the name of the primary client associated with the opportunity.
BD Lead	Displays the name of the employee who is the principal-in-charge for the opportunity.
Project Manager	Displays the name of the employee who is the project manager for the opportunity.
Proposal Manager	Displays the name of the employee who is the proposal manager for the opportunity.
Total Value	Displays the estimated monetary amount of the expected revenue if the

Opportunity Info	Description
	opportunity results in an awarded project.
Win Probability	Displays a number that represents the probability that the opportunity will become a project.
Weighted Revenue	Displays the weighted revenue of the opportunity that results from the **Total Value** and **Win Probability**.
Date Opened	Displays the date on which the opportunity was identified.
Date Closed	Displays the date on which the opportunity was closed.
Days Open	Displays the number of days the opportunity has been open.
Stage	Displays the current stage of the opportunity.
Type	Displays the type of job associated with the opportunity.
Source	Displays the source of the opportunity.
Record Status	Displays the status of the opportunity.
Estimated Start Date	Displays the date on which the job associated with the opportunity is expected to begin.
Estimated End Date	Displays the date on which the job associated with the opportunity is expected to be completed.
Vendor/Partners	Lists all vendors or partners linked to the opportunity.
Contacts	Lists all contacts linked to the opportunity.
Activities	Lists all activities linked to the opportunity.
Clients	Lists all clients linked to the opportunity.
Employees	Lists all employees linked to the opportunity.

Filter Opportunities

When viewing opportunities, use the tabs on the top of the screen to filter opportunities as follows:

- **All** — Tap this tab to view all opportunities that match your search entry.
- **Mine** — Tap this tab to view all opportunities associated with your employee record.
- **Recent** — Tap this tab to view the 25 most recently accessed opportunity records.

Add an Opportunity

1. Tap [+] to open the Add Opportunity screen.
2. Enter or select the opportunity's information in the following fields:
   - **Title** — Enter a title for the opportunity.
   - **Opp Number** — Enter an identification number for the opportunity. If Vision uses auto-numbering, you cannot enter a value in this field.
   - **Description** — Enter a brief description for the opportunity.
   - **Organization** — Tap this field, then select the organization that will be responsible for this opportunity from Select Team screen.
   - **Client** — Tap this field, then select the primary client to associate with the opportunity from the Select Client screen.
   - **Primary Contact** — Tap this field, then select the primary contact person for the opportunity from the Select Contact screen.
   - **BD Lead** — Tap this field, then select the principal person in-charge for the opportunity from the list that appears.
   - **Project Manager** — Tap this field, then select the project manager for the opportunity from the list that appears.
   - **Proposal Manager** — Tap this field, then select the proposal manager for the opportunity from the list that appears.
   - **Total Value** — Enter the estimated monetary amount of the expected revenue if the opportunity results in an awarded project.
   - **Win Probability** — Tap this field, then select the number that represents the probability that the opportunity will become a project from the list that appears.
   - **Weighted Revenue** — This field automatically calculates the weighted revenue based on the values you specified in the **Total Value** and **Win Probability** fields.
   - **Date Opened**, **Date Closed**, **Days Open** — Tap any of these fields to open the Date Range screen. Use the following fields to specify a date range.
     - **Date Opened** — Tap this field, then use the date picker to specify the date when the opportunity was identified.
     - **Date Closed** — Tap this field, then use the date picker to specify the date when the opportunity was closed.
     - **Days Open** — This field automatically calculates the number of days the opportunity has been open
   - **Stage** — Tap this field, then select the current stage or the opportunity from the list that appears.
   - **Type** — Tap this field, then select the type of job associated with the opportunity from the list that appears.
   - **Source** — Tap this field, then select the source of the opportunity.
   - **Record Status**, **Estimated Start Date**, **Estimated End Date** — Tap any of these fields to open the Estimate page. Use the following fields to specify estimates for the opportunity.

- **Estimated Start Date** — Tap this field and then use the date picker to specify the date on which the job associated with the opportunity is expected to begin.
- **Estimated End Date** — Tap this field and then use the date picker to specify the date on which the job associated with the opportunity is expected to be completed.
- **Record Status** — Tap this field and then specify if the job opportunity is **Active** or **Inactive**.

3. Tap **Save**.

Edit an Opportunity

1. Search for the opportunity to edit.
2. Tap the opportunity and then tap **Edit**.
3. Edit the necessary fields and then tap **Save**.

Delete an Opportunity

1. Search for the opportunity to delete and then tap **Edit**.
2. Tap **Delete Opportunity**.
3. Tap **Delete Opportunity** to confirm the deletion.

Settings

Use the information in this section to configure Touch CRM on your device.

Change Search Result Sorting

1. Tap **More » Settings**.
2. Tap beside the **Display By** field.
3. Select a sort setting from the list.

Enable/Disable Pin Security

If you use Windows authentication to access Touch CRM, you are required to enter a PIN. You cannot disable PIN security in this case.

1. Tap **More » Settings**.
2. Slide the **Use PIN** slider to **ON**/**OFF**.
3. Enter your password and then tap **OK**.
4. Enter a four-digit security PIN and then re-enter it to confirm.

Change Security PIN

1. Tap **More » Settings**.
2. Tap beside the **Change PIN** field.
3. Enter your password and then tap **OK**.
4. Enter a four-digit security PIN and then re-enter it to confirm.

Enable/Disable Usage Tracking

Usage tracking keeps a record of the number of times you accessed Touch CRM and the futures that you used.

Usage tracking does not track any personally identifiable data or confidential information such as client and contact names.

1. Tap **More » Settings**.
2. Use the **Usage Tracking** slider to enable (**On**) or disable (**Off**) usage tracking.

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