Deltek Vision® 7.x Create Client from Vendor Utility

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Overview

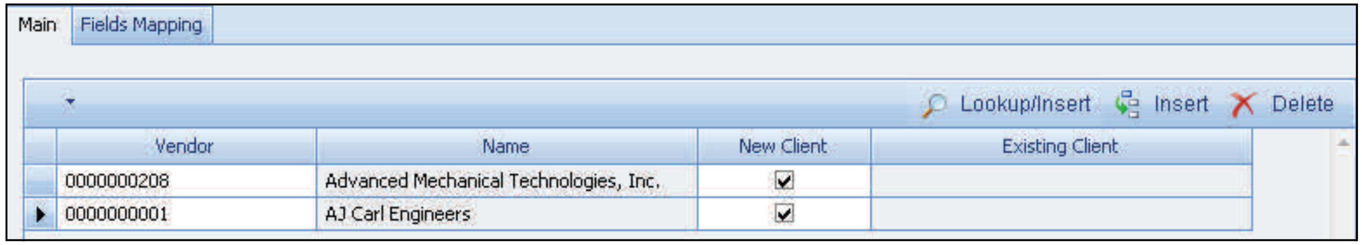
To accommodate each user type, Vision provides different methods for maintaining Client and Vendor Info Center data.

For CRM users, Vision includes a Create Client from Vendor utility that allows you to convert Vendor records into Client records and maintain data in one central location.

For other types of users, Vision continues to maintain data in the two separate Info Centers, but offers the ability to link records together. This allows Accounting, for example, to maintain accounts payable and create vendors based on awarded contracts.

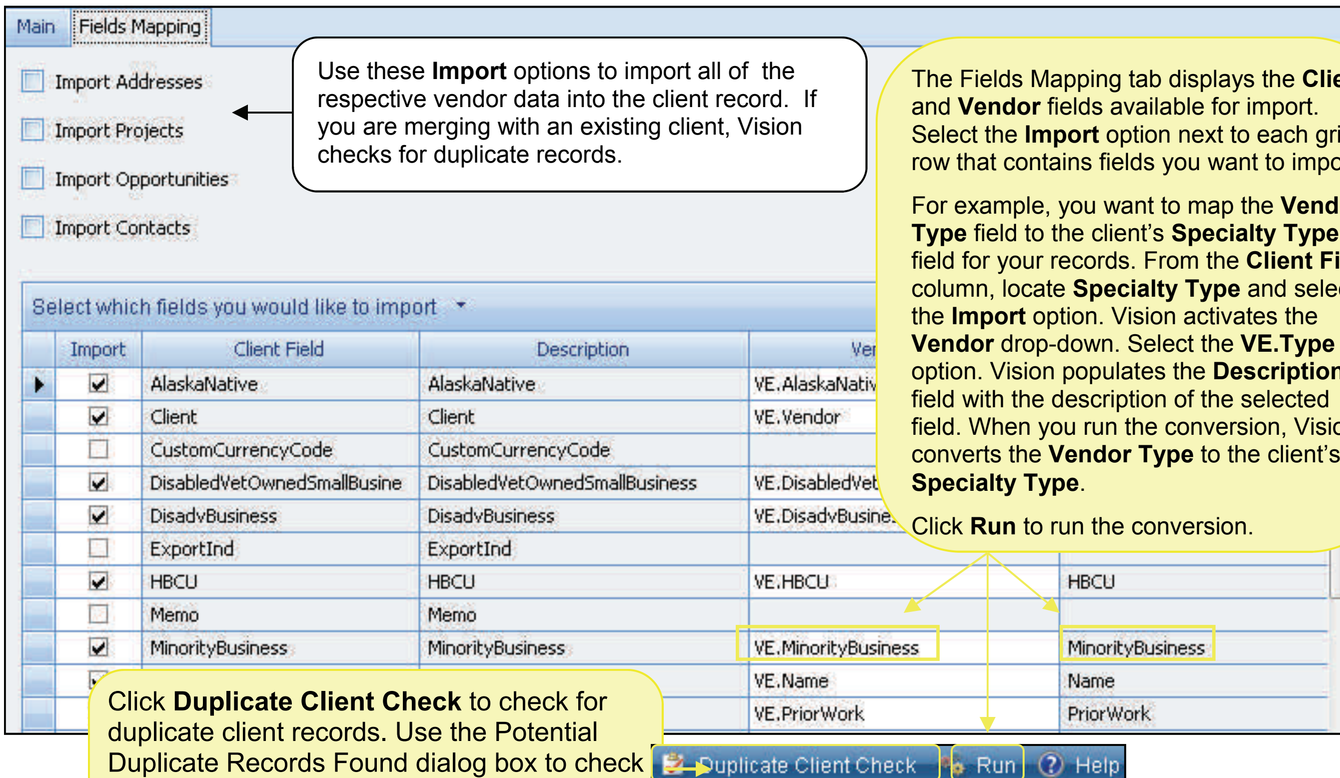
What Type of User are You?

- **Existing Vision CRM User:** Use the Create Client from Vendor Utility to share data between the Client and Vendor Info Centers and streamline their information into a central location. You can also keep the Client and Vendor Info Centers separate, but link their records together to share data.
- **New Vision CRM User:** During implementation, use Vision Security to disable the Vendor Info Center and enter all data in the Client Info Center. Use of the Create Client from Vendor Utility is not required.
- **Vision Accounting or Vision CRM and Accounting User:** You must maintain separate records in the Client and Vendor Info Centers; however you can link client and vendor records, and use the **New » Create Client from Vendor** menu option that pulls data from the Vendor Info Center into a new Client record. Use of the Create Client from Vendor Utility is not required.
- **Vision Resource Planning**: You must continue to set up clients and vendors separately. Planning utilizes the Vendor Info Center for budgeting. Use of the Create Client from Vendor Utility is not required.



To access the Create Client from Vendor utility:

1. Click **Utilities» Advanced Utilities** on the Vision Main Menu.
2. Click **Create Client from Vendor** and complete the fields on the Main tab:
   - **Vendor:** Look up or enter the name of the vendor record you wish to convert. The **Vendor** and **Name** fields populate with the respective vendor number and name.
   - **New Client:** Select to convert the vendor record into a new client record.
   - **Existing Client:** If **New Client** is not selected, use this option to access the Client Lookup and select the client record with which you want to merge the vendor record.



Use these **Import** options to import all of the respective vendor data into the client record. If you are merging with an existing client, Vision checks for duplicate records.

The Fields Mapping tab displays the **Client** and **Vendor** fields available for import. Select the **Import** option next to each grid row that contains fields you want to import.

For example, you want to map the **Vendor Type** field to the client's **Specialty Type** field for your records. From the **Client Field** column, locate **Specialty Type** and select the **Import** option. Vision activates the **Vendor** drop-down. Select the **VE.Type** option. Vision populates the **Description** field with the description of the selected field. When you run the conversion, Vision converts the **Vendor Type** to the client's **Specialty Type**.

Click **Run** to run the conversion.

Click **Duplicate Client Check** to check for duplicate client records. Use the Potential Duplicate Records Found dialog box to check the name and number of the existing record that exactly matches the number you are attempting to add.

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Deltek Vision® 7.x Using the Combined Client and Vendor Info Centers

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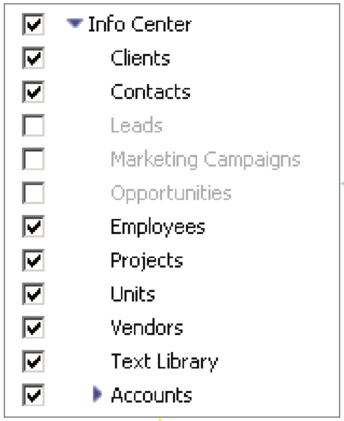


Overview

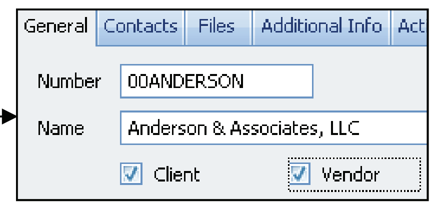
The way in which you use the combined Client and Vendor Info Centers depends on your business requirements. This feature was designed to accommodate various roles and their potential needs. Before you begin, it is important to know what type of user you are to determine how you will best benefit from this function.

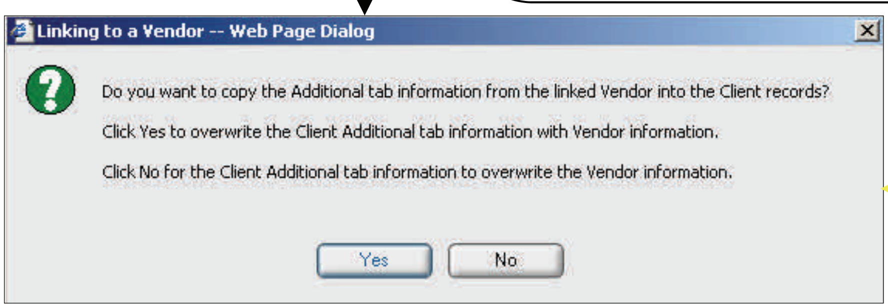
- **Existing Vision CRM User**: After setting up the Create Client from Vendor Utility (see the other side of this card), you must also use Security Configuration to disable the Vendor Info Center for all roles. Then, you can use the combined Client and Vendor Info Centers to track all firms or companies with which you interact, and manage the important data where there is a prime or sub relationship. With the single Info Center implementation, you can name the single info center "Firms," enter all client and vendor data in this one location, and eliminate the need to maintain the data in two info centers. This ensures your data remains synchronized and up-to-date.
- **New CRM User**: During implementation, use Vision Security to disable the Vendor Info Center, and then enter all client and vendor data in the Client Info Center. Use of the Create Client from Vendor Utility is not required.
- **Vision Accounting, or Vision Accounting and CRM:** You must maintain separate records in both the Client and Vendor Info Centers, which gives Vision the ability to associate client records with billing and use vendor records to process checks. However, you can link the client and vendor records together to maintain similar information, or use the **New » Create Vendor from Client** function to quickly create a new vendor record based on existing client data. Vision populates the vendor record with data from the Client Info Center, thereby reducing the need to enter duplicate information in multiple places within the database.
- **Vision Resource Planning**: You must continue to set up clients and vendors separately. Planning utilizes the Vendor Info Center for budgeting consultants and expenses.

CRM users can disable access to the Vendor Info Center on the **Configuration** » **Security » Roles** tab. Select the **Info Center** menu item, and scroll down and locate **Vendors** on the list. Remove the selection of this item to disable access.

When you are maintaining separate records in the Client and Vendor Info Centers, you can select the **Vendor** option on the General tab of the Client Info Center to access the Vendor lookup. Use this lookup to select the vendor record to which you wish to link the current client record. When you link a vendor to a client, it creates a one-to-one relationship between the two records. Because of this relationship, changes you make in one area update the other. For example, while in the Client Info Center:

- You also see the vendor's information on the Project and Opportunity tabs.
- Vision displays a message asking if you want to copy vendor information into the Client Info Center, or if you want the Client Additional Info tab information to update within the Vendor Info Center.
- Any changes made to the linked vendor will be updated in the linked client record.





Click **Yes** to see the vendor's information on the Project and Opportunity tabs, and for any changes made to the linked vendor to be updated in the linked client record.

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