Deltek

Deltek Ajera 10

Information Synced Between Ajera and CRM

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Information synced between Ajera and CRM

What information is shared between Ajera and CRM?

The integration with Ajera CRM/CRM Plus/Simple CRM syncs project, contact, and client information with Ajera information.

In order to sync information correctly, the process creates a relationship between corresponding information in both applications. Refer to the tables below to understand how the process maps information between Ajera and CRM. During the sync, records that exist on the mapping table but no longer exist in CRM will be removed from the mapping table.

The following information syncs between Ajera and CRM:

- Project
- List Information
- Employees
- Contacts
- Client

Project information from CRM to Ajera

Upon syncing, if a project doesn't exist in Ajera, a new project is created. Project information is created in Ajera based on information from the project in CRM and the project template either assigned to the project in CRM or the integration tab.

When a project is set to sync in CRM, the sync process will check for a project with the same name in Ajera. If that project exists, a new project will not be created and an error message will appear on the Integration Log.

To add projects that exist in both Ajera and CRM to the mapping table, run the manual sync option in Ajera (> **Setup** > **Utility**> **Synchronize with CRM**, and mark the **Map unsynced Ajera projects to existing CRM projects** check box).

If a project contains a business development phase, changes made to the **Probability** in CRM are synced to the **% Chance of Winning** field in Ajera. When the **Pursuit Stage** is changed to Won, Lost, or Do Not Pursue, the **Final Disposition Stage** in the Ajera BD phase is marked with the corresponding Stage.

Through the life of the project, changes made in Ajera are sent back to CRM if **Sync to Ajera** is marked on the Project in the Project Command Center.

You can also create a project in CRM from Ajera for projects that do not start as an opportunity.

Both Simple CRM and Ajera CRM/CRM Plus receive project information, dates, and cost information as well as Project Team information.

In addition Ajera CRM/CRM Plus receives Budget, Revenue, and Ajera project totals to CRM.

Ajera	Ajera CRM/CRM Plus	Simple CRM
*prjStatus	Status Active in CRM = Active in Ajera Closed/Inactive in CRM = Closed in Ajera **Note**: When you select a status of Closed for a project, the project will sync to CRM one final time regardless of the Sync to CRM option setting. The **Sync to CRM** option will then be deselected after the final sync if it is selected. The **Sync to CRM** option can be reselected in the PCC if further changes on the closed project are needed. It will only be included when **Sync to Closed Projects** is selected during a manual sync.	Status Active in CRM = Active in Ajera Closed/Inactive in CRM = Closed in Ajera **Note**: When you select a status of Closed for a project, the project will sync to CRM one final time regardless of the Sync to CRM option setting. The **Sync to CRM** option will then be deselected after the final sync if it is selected. The **Sync to CRM** option can be reselected in the PCC if further changes on the closed project are needed. It will only be included when **Sync to Closed Projects** is selected during a manual sync.
*prjDescription **Note**: If the project description is more than 40 characters, the description will sync to the Project Long Name in CRM. If the project description is less than 40	Project Short Name/ Project Long Name **Note**: The integration will check for duplicates and will not create two projects with the same prjDescription.	Project Short Name/ Project Long Name **Note**: The integration will check for duplicates and will not create two projects with the same prjDescription.

characters, the description will sync to the Project Short Name in CRM.		
prjID	Project Number	Project Number
prjKey	PIM ID (internal unique project field used to map the Ajera project with the CRM project.	PIM ID
prjProjectType	Project Type Description	Project Type Description
prjProjectManager	ProjMgr **Note**: If the employee is not set up in Ajera, it will use the template.	ProjMgr **Note**: If the employee is not set up in Ajera, it will use the template.
prjPrincipalInCharge	Principal **Note**: If the employee is not set up in Ajera, it will use the Principal in Charge from the template.	Principal **Note**: If the employee is not set up in Ajera, it will use the Principal in Charge from the template.
prjMarketingContact	Information, if any, comes from project template	Information, if any, comes from project template
prjLocation	Combines addresses from CRM	Combines addresses from CRM
prjActualStartDate	StartDate	StartDate
prjActualCompletionDate	EndDate	EndDate
prjEstimatedStartDate	Estimated start date **Note**: When a project is created in Ajera from CRM, this is filled in with the milestone estimated start date from the project in CRM. When the project is synced from Ajera to CRM, the estimated start date is updated with the changes from Ajera. If the date is blank in Ajera and there is a value in CRM, the value in CRM will not be blanked out.	Estimated start date
*prjBillingType	Information comes from the template selected when setting up the integration.	Information comes from the template selected when setting up the integration.
*prjRateTable	RateTable assigned in the template selected when setting up the integration.	RateTable assigned in the template selected when setting up the integration.
prjClientContact1-20	Contact marked to sync	Contact marked to sync

<table>
<tr><td></td><td>You can sync up to 20 contacts
Note: This syncs the first time but is not kept up to date.</td><td>You can sync up to 20 contacts
Note: This syncs the first time but is not kept up to date.</td></tr>
<tr><td>prjMarketingChanceofWinni-ng</td><td>Probability
Note: This field is not bi-directional and only updates from CRM to Ajera.</td><td>Probability
Note: This field is not bi-directional and only updates from CRM to Ajera.</td></tr>
<tr><td>pmsStatus</td><td>Stage Step
<table><tr><th>Vantagepoi-nt Stage Steps</th><th>Correspondin-g Ajera Status</th></tr><tr><td>Do Not Pursue</td><td>Declined</td></tr><tr><td>In Pursuit</td><td>Open</td></tr><tr><td>Won</td><td>Won</td></tr><tr><td>Lost</td><td>Lost</td></tr></table>**Note**: This field is not bi-directional and only updates from CRM to Ajera.
When a new project is created in CRM from Ajera, the Stage will be set to the first Won stage.</td><td>Stage Step
<table><tr><th>Vantagepoi-nt Stage Steps</th><th>Correspondin-g Ajera Status</th></tr><tr><td>Do Not Pursue</td><td>Declined</td></tr><tr><td>In Pursuit</td><td>Open</td></tr><tr><td>Won</td><td>Won</td></tr><tr><td>Lost</td><td>Lost</td></tr></table>**Note**: This field is not bi-directional and only updates from CRM to Ajera.
When a new project is created in CRM from Ajera, the Stage will be set to the first Won stage.</td></tr>
<tr><td>pmsStageDescription</td><td>Information comes from Stage List in Ajera
Note: This field is not bi-directional and only updates from CRM to Ajera.</td><td>Information comes from Stage List in Ajera
Note: This field is not bi-directional and only updates from CRM to Ajera.</td></tr>
<tr><td>pmsStageLongName</td><td>Information comes from Stage List in Ajera
Note: This field is not bi-directional and only updates from CRM to Ajera.</td><td>Information comes from Stage List in Ajera
Note: This field is not bi-directional and only updates from CRM to Ajera.</td></tr>
<tr><td>pmsCompletionDate</td><td>Pursuit Stage Won/Lost Date
Note: This field is not bi-directional and only updates from CRM to Ajera.</td><td>Pursuit Stage Won/Lost Date
Note: This field is not bi-directional and only updates from CRM to Ajera.</td></tr>
<tr><td>*prjInvoiceGroup</td><td>Information comes from the template selected when setting up the integration.</td><td>Information comes from the template selected when setting up the integration.</td></tr>
</table>

*prjCompany	Information comes from the template selected when setting up the integration.	Information comes from the template selected when setting up the integration.
*prjRevenueMethodLabor	Information comes from the template selected when setting up the integration.	Information comes from the template selected when setting up the integration.
*prjRevenueMethodExpense	Information comes from the template selected when setting up the integration.	Information comes from the template selected when setting up the integration.
*prjRevenueMethodConsulta-nt	Information comes from the template selected when setting up the integration.	Information comes from the template selected when setting up the integration.
igClient	Client assigned to the project in CRM	Client assigned to the project in CRM

The information marked with an asterisk (*) is required.

Additional Project Information

The following information is also updated from Ajera to CRM for project updates.

CRM Dashpart	Project field in Simple CRM & Ajera CRM	Ajera Table	Ajera column(s)
My Stuff > **Dashboards** > **Ajera CRM Project Totals** dashboard	Compensation	**Project**	LaborContractAmount (fee & T&E) + prjExpenseContractAmount billed as fee
	Direct Consultant		Consultant Contract Amount billed as Fee
	Direct Labor		LaborContractAmount for fee & T&E
	Direct Expense		Expense Contract Amount billed as Fee
	Reimbursable Allowance		Expense ContractAmount + Consultant Contract Amount for amounts billed as T&E
	Reimbursable Expense		Expense Contract Amount billed as T&E
	Reimbursable Consultant		Consultant Contract Amount billed as T&E

	Budgeted Overhead Rate		Overhead Percent from Department or sOverheadPercent from Preferences if Department rate doesn't exist
	Overall Percent Complete		Project Reported Percent Complete

Projects > **Dates** & **Costs** tab	Start Date	**Project**	Actual Start Date

	Estimated Completion Date **Note**: If this field is blank in Ajera, the field will not update to CRM.		Estimated Completion Date **Note**: If this field is blank in Ajera, the field will not update to CRM.
	Actual Completion Date		Actual Completion Date
My Stuff > **Dashboards** > **Ajera CRM Project Totals** > **Ajera CRM - WIP, Ajera CRM - Cost, Ajera CRM - Spent and Ajera CRM - Receiveddashparts**	Total Ajera Project Cost		Labor Cost Budget + Expense Cost Budget + Consultant Cost Budget
	Ajera Spent Labor		Spent Labor on the Project Base
	Ajera Spent Reimbursable		Spent Expense on the Project Base
	Ajera Spent Consultant		Spent Consultant on the Project Base
	Ajera Cost Labor		Cost Labor on the Project Base
	Ajera Cost Reimbursable		Cost Expense on the Project Base
	Ajera Cost Consultant		Cost Consultant on the Project Base
	Ajera WIP Labor		WIP Labor on the Project Base
	Ajera WIP Reimbursable		WIP Expense on the Project Base
	Ajera WIP Consultant		WIP Consultant on the Project Base
	Ajera Billed Labor		Billed Labor on the Project Base
	Ajera Billed Reimbursable		Billed Expense on the Project Base
	Ajera Billed Consultant		Billed Consultant on the Project Base
	Ajera Received		Receipts Labor on the

	Labor		Project Base
	Ajera Received Reimbursable		Receipts Expense on the Project Base
	Ajera Received Consultant		Receipts Consultant on the Project Base
Projects > **Project Team** > **Team Members grid** **Employee** > **Experience** > **Projects grid**	Employee	**Ajera Transaction**	Employee Name
	Project ID		Project Key
	Employee ID		Employee Key
	Role		Employee Type Must be a match with Employee Role in CRM
	Start Date		tDate First timesheet date employees enters time for this project for this role
	End Date		tDate
	CRMHours		tHours Total hours entered to this project for this employee for this role
Project > **Team** > **Firms grid** **Firm** > **Associations** > **Projects grid**	Firm Type	**Vendor**	Vendor

List Information

The following list information syncs from CRM to Ajera. List information in Vantagepoint can be found in Settings > Labels and Lists.

Ajera	CRM
Project Template	Syncs to Project Template
Employee Type	Syncs to Employee Role
Client Type	Syncs to Client Market Type
Project Type	Syncs to Project Type

Employee Information

Employees can be sent from Ajera to CRM if you select to do so on the Integrations tab.

Employee auto-numbering needs to be turned on in CRM.

Employee Types need to be set up as Employee Roles in CRM. Since the Employee Role in CRM is limited to only 50 characters, Employee Type descriptions will be limited to 50 characters when syncing to CRM.

Employee Titles can optionally be set up as Employee Titles in CRM.

The state set up on the Employee record needs to be the correct two letter state identifier in CAPS (Example: OR). The country needs to be the Country identifier in CAPS: US or USA or CA.

For unmapped Ajera employees, the sync process checks for an existing CRM employee with the same FIrst Middle Last name and department / Organization name. If an existing employee in CRM is found and not currently mapped, the two records are added to the mapping table. If no match is found, a new employee is created in CRM.

Ajera	Ajera CRM/CRM Plus	Simple CRM
AxVEC.vecFirstName	EM.FirstName	EM.FirstName
AxVEC.vecMiddleName	EM.MiddleName	EM.MiddleName
AxVEC.vecLastName	EM.LastName	EM.LastName
Department	Org subcodes > 1	Org subcodes > 1
Company	Org subcode 1	Org subcode 1
AxVEC.vecSupervisor	EM.Supervisor	EM.Supervisor
AxVEC.vecEmail	EM.EMail	EM.EMail
AxVEC.vecPhone1	EM.HomePhone	EM.HomePhone
AxVEC.vecPhone2	EM.WorkPhone	EM.WorkPhone
AxVEC.vecPhone3	EM.MobilePhone	EM.MobilePhone
AxVEC.vecFax	EM.Fax	EM.Fax
AxVEC.vecStatus	EM.Status	EM.Status
AxVEC.vecAddress1	EM.Address1	EM.Address1
AxVEC.vecAddress2	EM.Address2	EM.Address2
AxVEC.vecAddress3	EM.Address3	EM.Address3
AxVEC.vecCity	EM.City	EM.City
AxVEC.vecState	EM.State	EM.State
AxVEC.vecZip	EM.Zip	EM.Zip
AxVEC.vecCountry	EM.Country	EM.Country

AxVEC.vecDateTerminated	EM.TerminationDate	EM.TerminationDate
AxVEC.vecEmployeeNotes	EM.Memo	EM.Memo
AxEmployeeWage.ewIsHourly	EM.JobCostType	EM.JobCostType
AxEmployeeWage.ewIsHourly	EM.PayType	EM.PayType
AxVec.vecTitle	EM.Title	EM.Title
AxEmployeeType	CFGEmployeeRole	CFGEmployeeRole

Contact Information

Upon syncing, if a contact doesn't exist, a new contact is created in Ajera. The contact will be updated when changes are made in CRM or Ajera.

The integration will check for duplicates contacts. If a contact with the same first, middle, last, and description exist, that contact will be used in the sync.

You set how you want the contacts to sync between Ajera and CRM on the **Integrations** tab. You can set it up to sync no contacts at all (**None**), sync contacts from Deltek CRM to Ajera, or bidirectionally sync which creates and updates contacts between Ajera and Deltek CRM.

If the Integration Client is identified on the Contact, this will be the Firm on the Contact record in Vantagepoint CRM. The Contact will be added to the Contact tab for that Firm.

The state set up on the client record needs to be the correct two letter state identifier in CAPS (Example: OR). The country needs to be the country identifier in CAPS: US or USA or CA.

Contacts created in Ajera will also sync to CRM if your integration settings are set to bidirectional.

The contacts synced are those with **Ajera Sync** check on the project or client.

Ajera	Ajera CRM/CRM Plus	Simple CRM
cntStatus	ContactStatus	ContactStatus
*cntFirstName	FirstName	FirstName
cntMiddleName	MiddleName	MiddleName
*cntLastName	LastName	LastName
cntTitle	Title	Title
cntContactType	Type	Type
cntAddress1	Address1	Address1
cntAddress2	Address2	Address2
cntAddress3	Address3 + Address4	Address3 + Address4
cntCity	City	City
cntState	State	State
cntZip	Zip	Zip
cntCountry	Country	Country
cntMailingAddressSame	Checks the **Same as address** box in Ajera.	Checks the **Same as address** box in Ajera.
cntMailingAddress1	Address1	Address1
cntMailingAddress2	Address2	Address2
cntMailingAddress3	Address3	Address3

cntMailingCity	City	City
cntMailingState	State	State
cntMailingZip	Zip	Zip
cntMailingCountry	Country	Country
cntPhone1	Phone	Phone
cntPhone2	CellPhone	CellPhone
cntPhone3	HomePhone	HomePhone
cntFax	Fax	Fax
cntEmail	Email	Email
cntClient	Firm	Firm

The information marked with an asterisk (*) is required.

Client Information

Clients are part of the Firms Hub in Vantagepoint CRM. Upon syncing, if a client doesn't exist, a new client is created in Ajera. The client will be updated when changes are made in CRM or Ajera. For Ajera CRM, the clients synced are those identified with **Ajera Sync** marked or assigned to a project set to sync.

You set how you want the clients to sync between Ajera and CRM on the **Integrations** tab. You can set it up to sync clients from Deltek CRM to Ajera or bidirectionally sync which creates and updates clients between Ajera and CRM.

The state set up on the client record needs to be the correct two letter state identifier in CAPS (Example: OR). The country needs to be the country identifier in CAPS: US or USA or CA.

Clients created in Ajera will also sync to CRM if your integration settings are set to bidirectional.

The integration will check for clients with the same name. If a client with the same description exists, that client will be used in the sync.

Ajera	Ajera CRM/CRM Plus	Simple CRM
*vecDescription	Name	Name
* vecStatus	Status **Note**: Those marked active will sync active. Those marked inactive/dormant will sync inactive.	Status **Note**: Those marked active will sync active. Those marked inactive/dormant will sync inactive.
vecAddress1	Address1	Address1
vecAddress2	Address2	Address2
vecAddress3	Address3	Address3
vecCity	City	City
vecState	State	State
vecZip	Zip	Zip
vecCountry	Country	Country
vecMailingAddressSame	Checks the **Same as address** box in Ajera.	Checks the **Same as address** box in Ajera.
vecMailingAddress1	Address1	Address1
vecMailingAddress2	Address2	Address2
vecMailingAddress3	Address3 + Address4	Address3 + Address4
vecMailingCity	City	City
vecMailingState	State	State
vecMailingZip	Zip	Zip

vecMailingCountry	Country	Country
vecPhone1	Phone	Phone
vecFax	Fax	Fax
vecEmail	Email **Note:** Email syncs for CRM Plus only	Email
vecWebsite	Website	Website
vecAccountID	Account ID	Client Number

The information marked with an asterisk (*) is required.

Vendor Information

Vendors in Ajera sync to Firms in Vantagepoint.

Only vendors identified as a consultant vendor will sync to CRM (Setting up vendor types).

If a Firm with the same name as the Ajera vendor exists in Vantagepoint, that vendor will sync to the Firm in Vantagepoint. If it does not exist in Vantagepoint, a new Firm is created in Vantagepoint.

If you are mapping to an existing Firm, the Firm type will be set to Vendor.

If a Firm in Vantagepoint is already mapped to a client in Ajera, the Ajera vendor will still be mapped to the Firm in Vantagepoint.

Vendor updates to Vantagepoint will take place before Client updates to Vantagepoint. This will ensure that changes made to the Client take precedent.

Vendor contacts can sync to CRM with the new **Integration Vendor** field in **Setup > Contacts**. The **Integration Vendor** field allows you to select a vendor associated with the contact.

Ajera	Ajera CRM/CRM Plus	Simple CRM
Vendor	Firm Type This name varies depending on the Labels set up in Vantagepoint.	Firm Type This name varies depending on the Labels set up in Vantagepoint.
vecDescription	Firm Name	Firm Name
vecStatus	Status This is marked as Active if Ajera = Active or Dormant if Ajera = Inactive	Status This is marked as Active if Ajera = Active or Dormant if Ajera = Inactive
vecAddress1	Address1 The address will be marked as Primary if an address does not already exist	Address1
vecAddress2	Address2	Address2
vecAddress3	Address3	Address3
vecCity	City	City
vecState	State	State
vecZip	Zip	Zip
vecEmail	Email	Email
vecWebsite	Website	Website
Vendor ID	Account ID	Account ID
vecPhone1	Phone	Phone

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