Deltek Touch CRM for Vision 1.2

Release Notes

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Contents

Overview

Welcome to Deltek Touch CRM for Vision 1.2 Release Notes. These release notes contain a summary of the following:

- Major New Features
- Enhancements
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Pre-Installation Information

Before you begin the installation of Touch CRM for Vision, it is important to understand the information discussed in this section.

The official name of the application is *Deltek Touch CRM for Vision*. This document only uses it at first mention. The succeeding instances of the application name display *Touch CRM*.

In addition, the application name in *Google Play* and *Apple App Store* displays *Touch CRM for Deltek Vision*.

Technical Considerations

The following requirements must be met to run Touch CRM for Vision:

- Touch CRM requires that Vision is accessible to your mobile device either over the Internet or via a private network to which your device is connected. For additional information about known issues, see Deltek Knowledge Base #72783.
- Touch CRM supports communication with the Vision server via HTTP or HTTPS. Deltek recommends that you use HTTPS protocol in your production deployment. HTTPS encrypts the data in transit

  If you are going to access Touch CRM from the Internet, open a port in your firewall to access the Touch CRM virtual directory, which will be installed on the IIS server.

  When Vision is not exposed to the Internet, a VPN can be used to connect the mobile device to the corporate network on which Vision resides to provide the connection needed for Touch CRM. However, while the most common VPN configurations will most likely work without problems, Deltek has not tested all possible VPN types and configurations to ensure compatibility.

- Touch CRM works with Vision 7.1 Cumulative Update #011 and Vision 7.2.

  To use the full functionality of Touch Time, you must be on the latest Touch server and Vision.

  When installing Touch Time on a dedicated server, ensure that the Vision Web service URL (for example, https://server.company.com/vision/visionservices.asmx) can be accessed from the Touch server. This includes ensuring that the required TCP/IP ports (for example, 443) are open and the Vision server can be resolved via DNS from the Touch server.

  You must own Vision core.

- You must install Touch CRM on an IIS server that is installed on Windows 2008, Windows Server 2008 R2, or Windows Server 2012. This can be the same as your Vision server or a separate server.
- Touch CRM supports applications from the *Apple App Store* and *Google Play*.

  If you are using an unsupported version of Vision (compatibility mode), you may be able to use the device native browser to enter your organization's Touch CRM URL. The default URL can be changed to something else by the administrator. The Touch CRM URL has the format https://**<server>**/deltektouch/vision/crm, where **<server>** refers to the host name of your Touch server.

Mobile Device Requirements

The Touch CRM application supports mobile devices that run on the following operating systems:

- Apple iOS 5.0 and higher
- Android 2.3.3 and higher (excluding 3.x)

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, all the user guides and quick reference guides listed in this table are available for download from the Deltek Customer Care Connect site.

Document Name	Description
Deltek Touch CRM for Vision Installation Guide	This document provides instructions for the installation and configuration of application.

Document Name	Description
Deltek Touch CRM for Vision User Guide	This document contains detailed information and instructions on how to use various features of the application.

Major New Features

This section includes summaries of the new features included for this release.

Associations

Touch CRM now allows you to link opportunities, clients, contacts, and employees together and to define relationships between the linked records. You can also use this to associate one or more employee records with a client record.

- You can add an association by tapping and then tapping the appropriate option under **Create New** or **Associate with Existing**.
- You can edit an association on the **Association screen** by tapping one of the associated records. For example, if you are editing an association between a contact and opportunity, open the contact or opportunity record and then tap the association type that you would like to edit. Tap the link next to the record for which you would like to edit the association. Edit the association and tap **Save.**
- You can also remove an association between two records by tapping **Remove Association** on the **Association** screen.

When adding or updating a record, Touch CRM follows the same business logic as Vision core. Selecting a Contact, Client, Supervisor, Principal, or Project Manager associates an opportunity automatically with the selected employee.

- Touch CRM prompts you whether to assign the Owner role to the newly selected contact or client.
- If an employee was already assigned the Supervisor, Principal, or Project Manager role, Touch CRM removes the role from the existing employee association and assigns the new employee the Supervisor, Principal, or Project Manager role.

Primary Contact List on Opportunity

The **Select Contact** list only displays contacts that belong to a selected primary client.

- If you select a primary client, only contacts associated with that client display in the list on the **Select Contact** screen for the primary contact. In addition, the **Primary Client** field displays automatically the client associated with the primary contract.
- If you do not select a primary client, all available contacts display on the **Select Contact** screen.

Create New Option

Aside from tapping a particular tab (for example, **Opportunity**) and then tapping to open the corresponding **Add** screen (for example, **Add Opportunity**), Touch CRM also allows you to add a record and associate it to an existing record in one step by tapping , which you can access on the following screens:

- **Details** screen of the **Contacts** and **Opportunity** tabs
- **Client Info** screen of the **Clients** tab

Calendar Screen

Touch CRM now allows you to view calendar activities. By default, activities for today, the next seven days, and previous seven days are displayed. If you scroll up, Touch CRM displays activities from the previous week. If you scroll down, it displays activities for the next week.

In Vision configuration, Activity Types have a Display setting, which controls where activities are displayed in Touch CRM. Only activities that are associated with a Calendar activity type display on the **Calendar** screen. All other activities display on the **Tasks and Activities** screen.

Each activity displays the following details:

- Subject
- Owner
- Completed
- Primary Client
- Primary Contact
- Attendees
- Contacts
- Location
- Type
- Reminder
- Start and End Times
- Opportunity
- Project
- Primary Contact Details
- Notes

You can access the **Calendar** screen by tapping the **More** tab and then tapping **Calendar**.

Tasks and Activities Screen

Touch CRM now allows you to view non-calendar activities for today and the next seven days. If you scroll up, Touch CRM displays activities from the previous week. If you scroll down, it displays activities for the next week.

In Vision configuration, Activity Types have a Display setting, which controls where activities are displayed in Touch CRM. All activities that are not associated with a Calendar activity type display on the **Tasks and Activities** screen.

Each activity displays the following details:

- Subject
- Owner
- Completed

- Primary Client
- Primary Contact
- Attendees
- Contacts
- Location
- Type
- Reminder
- Start and End Times
- Opportunity
- Project
- Primary Contact Details
- Notes

You can access the **Tasks and Activities** screen by tapping the **More** tab and then tapping **Tasks and Activities**.

Currency Field

Touch CRM now supports multicurrency through the **Currency** drop-down field under the **Weighted Revenue** field on the **Opportunity** screen. This field, however, only displays if you are using a multicurrency database and you have rights to this field. The available options must include currencies that are enabled for the company (and all currencies for all companies, if **MultiCompany** is enabled).

An administrator can set up the functional currency and enabled currencies on the **Currency** tab of **General Company Settings**.

Enhancements

This section includes summaries of the enhancements made to existing features in this release.

Updated Mine Criteria for Opportunity

If an employee is assigned as either the Project Manager or Principal-In-Charge on an opportunity record, the opportunity displays in the **Mine** list.

More Methods of Adding an Opportunity

There are now three ways to open the **Add Opportunity** screen:

- Tap **Opportunities**, then tap .
- Tap on the **Details** screen of the **Contacts** tab. Then, under **Create Opportunity**, tap **Opportunity**. This action creates a new opportunity and associates it to the contact.
- Tap on the **Client Info** screen of the **Clients** tab. Then, under **Create Opportunity**, tap **Opportunity**. This action creates a new opportunity and associates it to the client.

Enhanced User-Defined Field Functionality

Touch CRM allows you to edit necessary User-Defined Fields (UDFs). Adding, editing, or removing data from these fields in Touch CRM provides corresponding updates in Vision core. Any updates you make in Vision core also reflects in Touch CRM.

Here are the added UDF types that Touch CRM now supports:

Lookups

- Projects
- Custom Lookup List
- Vendors
- Lead
- Marketing Campaign
- Text Library
- Account

In addition to the specified UDF types, Touch CRM now allows you to enter text in the UDF drop-down list (if it is configured to allow you to enter a value that is not in the list) instead of only selecting an option from the list.

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Software Issues Resolved

Descriptions of Software Issues

You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. For the most part, these issues were addressed before this release through hot fixes, and the additional information was developed to help you decide whether or not you needed to install the hot fixes.

When you install this release, you must install all fixes in the release; you cannot choose to install some and not others. Nevertheless, this additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

No Matching Contact on Select Contact Screen

Description: The **Contact** field on the **Edit Opportunity** screen only displayed a contact that was associated to the logged on user. When you tapped the contact field to edit, a message displayed on the **Select Contact** screen, informing you that there was no matching contact.

Customers Impacted: This defect affected all Touch CRM users.

Additional Notes: None.

Wrong Default Date Opened on Add Opportunity Screen

Description: If you added an opportunity, the **Date Opened** field would be empty. It should display the current date by default.

Customers Impacted: This defect affected Touch CRM users.

Additional Notes: None.

More Button Still Displayed on Select Organization Screen

Description: The **More** button still displayed on the **Select Organization** screen even though Touch CRM has been designed to display all organizations.

Customers Impacted: This defect affected Touch CRM users.

Additional Notes: None.

Employee User-Defined Field Displayed Employee Number Instead of Employee Name

Description: If you selected a value for two **Custom Employee** fields on the **UDF** tab and tapped **Save**, the first employee UDF would display **Empnumber** instead of **Empname**.

Customers Impacted: This defect affected Touch CRM users.

Additional Notes: None.

Updated Contacts Label in Screen Designer Did Not Display on Opportunities Screen

Description: If you changed the **Contacts** label in **Screen Designer** of Vision core, the updated label would not display in the **Contacts** field on the **Details** screen of **Opportunities**.

Customers Impacted: This defect affected Touch CRM users.

Additional Notes: None.

Workflow Error When Adding Client Record

Description: When you tried to add a client record that had an associated User-Defined Field and tapped **Done**, an error about the Workflow processing displayed.

Customers Impacted: This defect affects all Touch CRM users.

Additional Notes: None.

Known Issues

This section includes summaries of the issues that exist in Touch CRM and will be resolved in the future. You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. The additional information has been included in case you simply want more background information about the defect repairs.

This section does not contain a complete list of outstanding issues. Deltek only includes the high priority issue in Touch CRM for this release. Please contact Deltek Customer Care if these known issues present a significant impact on your business.

Cannot Select Year Properly on Estimate Screen

Description: When you try to edit estimated start and end dates of an Opportunity, Touch CRM would not highlight the corresponding year properly.

Customers Impacted: This defect affects Touch CRM users who are accessing the application via Web browser.

Workaround Before Fix: None.

Additional Notes: None.

Scrolling Not Working Properly When You Edit a Field

Description: When you edit a field after you saved a record and then scroll up or down, the view is only limited to the bottom part of the interface.

Customers Impacted: This defect affects all Touch CRM.

Workaround Before Fix: None.

Additional Notes: None.

Currency Field Defaults to Blank Instead of Functional Currency

Description: When you add an Opportunity record, the default value of the **Currency** field is blank instead of the functional currency for the company of your associated employee.

Customers Impacted: This defect affects all Touch CRM users.

Workaround Before Fix: None.

Additional Notes: None.

Portion of a Screen Not Responding After Editing Note Field on Contacts or Clients

Description: If you edit the **Note** field of a contact or client record and then tap **Done** or **Cancel**, certain portion of the next screen would not respond if you tap it.

Customers Impacted: This defect affects Touch CRM users who are using devices running on iOS 5.x.

Workaround Before Fix: None.

Additional Notes: None.

Slow Response When Opening the Application from Web

Description: Opening Touch CRM from a Web browser for the first time takes longer than expected, only displaying the loading screen instead proceeding directly to the Login screen.

Customers Impacted: This defect affects Touch CRM users who are using devices running on iOS.

Workaround Before Fix: Open Touch CRM via the packaged application, which you can download from *Google Play* or *Apple App store*.

Additional Notes: None.

Deltek is the leading global provider of enterprise software and information solutions for professional services firms, government contractors, and government agencies. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. Over 14,000 organizations and 1.8 million users in approximately 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resource, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.®

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