Deltek CRM for Professional Services

User Guide

January 2020

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Overview

Deltek CRM for Professional Services is a mobile application that enables you to view, add, and edit firm (clients and vendors), contact, activity, and project information for Deltek CRM from your touch screen device.

> **Note:** The official name of the application is *Deltek CRM for Vantagepoint*. This document only uses it at first mention. The succeeding instances of the application name display *Deltek CRM*.
>
> In addition, the application name in *Apple App Store* displays *Deltek CRM for Vantagepoint.*

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

> **Note:** To use the full functionality of Deltek CRM, you must be on the latest Deltek CRM Server and Deltek Vantagepoint. You can use the application with lower versions of Deltek Vantagepoint and Deltek CRM Server, but new features will not be available. Deltek CRM Server must be installed and configured using the guidelines in the Deltek Vantagepoint Technical Installation Guide.

Mobile Device Requirements

The Deltek CRM application supports mobile devices that run on Apple iOS 10.0 and higher.

Getting Started

Your Deltek CRM administrator sends you an email message containing a link that directs you to a page that displays two separate links.

- Tapping the first link directs you to the mobile application in the app store, allowing you to download it into your device.
- Tapping the second link automatically populates the **Server URL** field in the downloaded application.

Install Deltek CRM for Professional Services

If Deltek CRM has already been installed, tapping the second link populates the **Server URL** field. In this case, proceed to step 3.

1. In *Apple App Store*, search for the application (*Deltek CRM for PS)*. Make sure that you select the correct application because Deltek has several CRM applications for different products.
2. Download and install the application by tapping the appropriate buttons.
3. Tap the installed application, and follow the screen prompts to accept the terms of agreement and usage tracking.

> **Note:** Deltek CRM supports Lightweight Directory Access Protocol (LDAP) authentication in a multiple domain environment.

> **Note:** Tap **Connection Help** on the **Server URL** screen to view information about establishing connection to Deltek Vantagepoint:
>
> - Your administrator must install the Deltek CRM Server in order to use the Deltek CRM mobile application.
> - During setup, the administrator creates an application URL, which is different than your normal browser URL that you access through a PC.
> - The application URL uses the following format by default, where <server> refers to the host name of your Deltek CRM Server. The default URL can be changed to something else by your Deltek Vantagepoint administrator:
>
>   https://<yourdomain>/vantagepoint/touch/crm/visionshared/backend/vantagepointcrmurl.php
> - Make sure that the URL is correct by copying and pasting the URL from an email. For example, the **s** in **https** is often missed when typing the URL directly in the field. Contact support if you continue to have connection issues.

Log On to Deltek CRM for Professional Services

Initial and succeeding logins differ slightly. For initial login, you tap a link to either download the application from the appropriate app store or automatically sets up the Server URL. For succeeding logins, you only need to enter your security PIN.

1. Tap *Deltek CRM for PS*.
2. On your first login, the application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.

    Note: When usage tracking is enabled, the application tracks the number of times you access the application and how often you use certain features. Deltek CRM does not track any personal or confidential data, such as user name, projects, and clients.

3. Tap the link to either download the application from the appropriate app store or automatically populate the **Server URL** field. The URL has the following format: https://<yourdomain>/vantagepoint/touch/crm/visionshared/backend/vantagepointcrmurl.php.

    Note: For more information about establishing connection to Deltek CRM, click **Connection Help**.

4. Tap **Connect**.
5. Tap the **User ID** and **Password** fields to enter corresponding values.
6. Tap the **Database** field, and scroll through the list.
7. Tap a database, and tap **Done**.

    Note: If the Single Sign-On authentication is used, the **Windows Authentication** toggle switch displays.

8. Tap the **Language** field if you want to set the app to use a different language.
9. Tap **Log In**.
10. Enter a four-digit PIN code, which you will use on your succeeding logins.

    Note: Deltek CRM remembers your user ID and selected database (and domain if Windows Authentication is being used) on your next login. To log in using a different user ID and database, tap **Forget Me on this Device** on **Settings**. All your user settings and favorites will be lost.

Security PIN

For initial login, Deltek CRM requires you to create a PIN. Enter a four-digit PIN, and re-enter it to confirm. Instead of entering your user name and password on your next login, you need to enter your PIN.

Log On Using Windows Authentication

You can use Windows Authentication to log on to Deltek CRM. Based on a server-side setting, the application prompts you to log on using your domain credentials to log on to Deltek Vantagepoint. You then have the option to log on to Deltek Vantagepoint using either Windows Authentication or a standard user name and password. Logging on with domain credentials (either for the Deltek Vantagepoint server or database) requires you to use a PIN.

After your Vantagepoint Administrator sets up single sign-on, you must follow a set of login steps to enable Windows Authentication. Your Vantagepoint Administrator must give you your Azure active directory domain account user name and password.

To log on, complete the following steps:

1. On the login screen, toggle the **Windows Authentication** switch to **On**. The **Password** field becomes disabled.
2. In the **User ID** field, enter your Azure email address, and tap **Log In**.
3. On the Microsoft dialog box that requests your password, enter your Azure password, and tap **Sign In**.
4. Once your credentials are validated, the Deltek CRM for Professional Services application opens.
5. Enter a four-digit PIN, and re-enter it to confirm.

Log Out of Deltek CRM for Professional Services

To log out of the application, take one of the following actions:

- Press the **Home** button of your device.
- Tap , and tap **Log Out**. If you choose to do this, Deltek CRM prompts you for your PIN or password on your next login regardless of the timeout period.
- Tap , and tap **Settings**. Tap **Log Out**.

> **Note:** If you do not want the application to remember your credentials and favorites, tap **Forget Me on this Device**.

Change User

1. Tap **Log Out**.
2. On a PIN screen, tap **Change User**.
3. The application prompts you to accept Terms and Use of Service and Usage Statistics Tracking. Tap the corresponding buttons.
4. On **Log In**, enter another user ID and password.
5. Tap **Log In**.
6. Enter a four-digit PIN code, which you will use on your succeeding logins.

Closing Deltek CRM for Professional Services

If you close Deltek CRM 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. If your session has timed out, you will be prompted to enter your PIN the next time the application communicates with Deltek Vantagepoint.

Quickbook Integration

If the Quickbook (QB) sync is enabled with Deltek PSA and Deltek CRM for Professional Services, all mapped fields created via QB become read-only for both firm and contact records in Deltek CRM for Professional Services. In this case, the button for deleting firms and contacts are not available.

One of the main purposes of lead qualification is the ability to add a firm from a contact in Deltek CRM for Professional Services. As part of the QB integration support, adding a firm in Deltek CRM for Professional Services now adds the same firm as a client or vendor to QB. Once the firm is available in QB, it becomes read-only in Deltek CRM for Professional Services. If you need to make any changes, you must edit it in QB.

> **Note:** Only those new contacts added directly in Deltek CRM for Vantagepoint (but not synced back to QB) are editable.

Screen Display

Deltek CRM consists of the following features, which you access by tapping :

- **Contacts** — Tap to search, view, add, edit, or delete contact records. You can also view an activity or add one to a contact record.
- **Firms** — Tap to search, view, add, edit, or delete firm records. You can also view an activity or add one to a firm record.
- **Projects** — Tap to search, view, add, edit or delete projects. You can also view an activity or add one to a project record.
- **Activities** — Tap to access and manage calendar activities and tasks. Your administrator designates the values in the **Type** drop-down list, such as meeting, task, and phone call.
- **Settings** — Tap to access and manage settings of Deltek CRM on your device.
- **Help** — Tap to access the user guide for Deltek CRM. You can also access this feature from **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.

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:

- Phone Numbers — 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 editor, where the email address is automatically added as a recipient.

User-Defined Fields

Deltek CRM displays user-defined fields (UDFs) used in Deltek Vantagepoint on the **Misc** tab. Your administrator determines which UDFs are available in the application.

Note: By default, the tab name is **Misc**.

The administrator can configure user-defined drop-down fields so that you can enter a value that is not in the list. In that case, you can either enter a text in the lookup list or select an option from the available list. This applies to drop-down lists that are “Not limited to list” in the User Defined Components settings.

Contacts

The Details tab on the **Contact** screen enables you to view contact information as well as add, edit, or delete contact records. To access the screen, tap ☰ then **Contacts**, search for a contact, and tap › in the contact name.

Note:

- By default, Deltek CRM searches for active records only. To find inactive contacts, tap **All**.
- The application honors Deltek Vantagepoint role security. Thus, you have the same access (such as read, edit, add, and delete) to contact records in Deltek CRM as you do in Deltek Vantagepoint.

View Contact Records

To view a contact record, enter the contact name or the firm 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.

Note: Deltek CRM displays 25 contact records at a time by default, but you can change this on **Settings**. 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 **Details** screen.

Contact Info	Description
Email	Displays the contact's email address.
Business	Tap this field to view the business address of the firm associated with the contact in a map.
Market	Displays the business classification of the c
Activities	Tap this field to view all activities linked to the contact.
Projects	Tap this field to view all projects linked to the contact.
Employees	Tap this field to view all employees linked to the contact.

Note:

- For all phone fields, you can tap the corresponding number to call it.
- For all email address and home/other address fields, you can tap them to compose a message or open the address in a map.

Filter Contact Records

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

- **Active** — Tap to view all active contact records. This is the default search.
- **Mine** — Tap to view all contact records associated with your employee record.
- **Recent** — Tap to view the 25 most recently accessed contact records.
- **All** — Tap to view all contact records that match your search entry.

Status of a Contact

If you are using CRM Plus users and leads are enabled, the **Status** and **Qualified Status** fields on the **Edit Contact** screen are combined and displayed on the **Contact** screen. It displays one of the following status, depending on the contact's two status fields:

- **Active New Lead** — Status is **Active** and Qualification Status is **New Lead**
- **Disqualified** — **Disqualified** (active or inactive)
- **Active Qualified Contact** — Status is **Active** and Qualification Status is **Qualified Status**
- **Inactive New Lead** — Status is **Inactive** and Qualification Status is **New Lead**
- **Inactive Qualified Contact** - Status is **Inactive** and Qualification Status is **Qualified** Contact

Add a Contact

You can also add a contact from a firm or a project record.

1. Tap , tap **Contacts**.
2. On **Contacts**, tap .
3. On **Add Contact**, tap or enter necessary information in **New Contract**, **First Name**, **Last Name**, **Email**, and **Firm**.

   > **Note:** You must provide information on at least two of the **First Name**, **Last Name**, **Email**, or **Firm** 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, Deltek CRM lists those contact records.
   >
   > - To append an existing record, select the contact record from the lists.
   > - To create a new record, tap **Add New Contact**.
   >
   > The **Qualified Status** option is only available if CRM Plus and Leads are enabled.

4. Tap **Next** .
5. On **Add Contact**, tap the fields to enter or select the appropriate information about the contact. You can also tap the picture icon to add a photo of the contact from your device gallery or by taking a new photo.
6. Tap **Save**. The contact record is automatically associated with your employee record.

Edit Contact Information

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for the contact record to edit.
3. On **Contact**, tap .
4. Edit the necessary fields. To delete the contact photo, tap the picture icon and tap **Delete Existing Photo** on **Edit Photo**.
5. Tap **Save**.

Add a Project to a Contact Record

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap the contact record to edit.
3. On **Contact**, tap and tap **Project** under **Create New**.
4. On **Add Project**, enter or select the appropriate values, and tap **Save**.
5. On **Association**, enter or select the appropriate values, and tap **Save**.

Qualify a Lead

This only applies to CRM Plus with lead qualification enabled. Qualifying a lead automatically changes the qualification status to **Qualified Contact** and the contact's status to **Active**.

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap contact you want to qualify.
3. On **Contact**, tap **Qualify** (for new leads) or and tap **Qualify Contact**.
4. On **Qualify Contact**, tap **Qualify a Contact**. You can also take any of the following actions:
   - Tap **Create New Firm** to add a new firm.
   - Tap **Create New Project** to add a new project.
   - Tap **Marketing Campaign** to associate a marketing campaign.
5. Tap **Done**.

Disqualify a Contract or New Lead

This only applies to CRM Plus with lead qualification enabled.

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap contact you want to disqualify.
3. On **Contact**, tap **Disqualify** (for new leads) or and tap **Disqualify Contact**.
4. On **Disqualify Contact**, tap **Reason** to select a reason for disqualifying from the list, and tap **Done**.
5. Tap **Disqualify Contact**.

Revert a Contact to a Lead

This only applies to CRM Plus with lead qualification enabled.

Reverting a contact removes all associations (firm, project, or project records) for that contact.

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap contact you want to revert to lead.
3. On **Contact**, tap and tap **Revert to Lead**.

Delete a Contact Record

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap contact you want to delete.
3. On **Contact**, tap .
4. On **Edit Contact**, tap **Delete Contact**.
5. Tap **Delete Contact** to confirm the deletion.

Firms

The **Firm info** screen allows you to view firm information as well as to add, edit, or delete firm records. To access the screen, tap ☰ then tap **Firms**, search for a firm, and tap › in the firm name.

> **Note:** By default, Deltek CRM searches for active records only. To find inactive firms, tap **All**.

View Firm Records

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

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

> **Note:** Deltek CRM displays 25 firm records at a time. To display the next set of firm records, scroll to the bottom of the screen and then tap **More**.

Firm Information

The following table lists the information that displays on the **Firm info** screen.

Firm info	Description
Name	Displays the firm's name.
Market	Displays the business classification of the firm.
Number	Displays the unique number for the firm.
Relationship	Displays your relationship with the firm, for example, **Existing** or **Prospect**.
Status	Displays the status, such as **Active** or **Inactive**, for your current relationship with the firm.
Notes	Tap this field to view and/or edit miscellaneous information about the firm.
Addresses	Tap this field to edit the primary address of the firm in a map. Tap **Add Address** to add another address or a **Primary** address, which indicates that the address is the default address of the firm.
Address List	Tap this field to view the firm's registered addresses.
Contacts	Tap this field to view all the contacts that are linked to the firm.
Activities	Tap this field to view all activities linked to the firm.

Firm info	Description
Projects	Lists all the projects that are linked to the firm.
Employees	Lists all the employees that are linked to the firm.

Note: You can only view first level association information for **Contacts**, **Firms**, and **Employees** when tapping on a record from another record. For example, if you tap a contact while viewing a firm record, you would not see a list of all the opportunities associated to that contact.

Filter Firm Records

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

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

Add a Firm

You can also add a firm from a project record (on **Details**, tap and tap **Firm** under **Create New**).

Note: Adding a firm in Deltek CRM now adds the same firm as a client or vendor to QB. Once the firm is available in QB, it becomes read-only in Deltek CRM. If you need to make any changes, you must edit it in QB.

1. Tap , tap **Firms**.
2. On **Firms**, tap .
3. On **Add Firm**, enter the firm name, and tap **Next**.

   Note: If the firm name you entered is similar to an existing firm record, Deltek CRM lists those firm records.

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

4. On **Add Firm**, tap beside the **Market**, **Number**, **Relationship**, **Type**, and **Status** fields to edit the firm's information.
5. You can tap **Picture** to add a photo of the firm from your device gallery or by taking a new photo.
6. You can tap the **Notes** field to enter additional information about the firm. Tap **Done**.
7. Tap **Add Address**.
8. On **Add Firm Address**, enter an address of the firm. Toggle the **Primary Address** switch to **ON** if you want to set the address as such.

9. Tap **Done**.
10. On **Add Firm**, tap **Save**.

Edit a Firm Record

1. Tap , and tap **Firms**.
2. On **Firms**, search for and tap the firm record to edit.
3. On **Firm**, tap .
4. On **Edit Firm**, modify the necessary information. Tap in some fields to edit.
5. Tap **Save**.

Add a Project to a Firm Record

1. Tap , and tap **Firms**.
2. On **Firms**, search for and tap the firm record to edit.
3. On **Firm**, tap and tap **Project** under **Create New**.
4. On **Add Project**, enter or select the appropriate values, and tap **Save**.
5. Enter the details for the association to the firm, and tap **Save**.

Delete a Firm Record

1. Tap , and tap **Firms**.
2. On **Firms**, search for the firm to delete.
3. On **Firm**, tap .
4. Tap **Delete Firm**.
5. Tap **Delete Firm** to confirm the deletion.

Projects

The **Details** screen of a project enables you to view contact information as well as add, edit, or delete projects. To access the screen, tap ☰ then tap **Projects**, search for a project, and tap › in the project name.

> **Note:** By default, Deltek CRM searches for active records only. To find inactive opportunities, tap **All**.

View Project Records

To view a project, enter the project name in the **Search** field and then tap the search icon. All project records associated with your search entry display on the screen. There are four search types:

- Searching on the In Pursuit tab displays all active projects which stage has a step of In Pursuit.
- Searching on the Mine tab displays all active projects where you (as the logged on user) are on the team or has one of the key employee roles (Project Manager, Principal, Supervisor, BD Lead, Marketing Coordinator, or Proposal Manager).
- Searching on the Recent tab displays all recently opened projects.
- Searching on the All tabs displays all projects regardless of stage, status, or team members.

> **Note:** Deltek 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**.

Project Information

The following table lists the information that displays on the **Details** screen of a project.

Project Info	Description
Name	Displays the project title.
Number	Displays the project number.
Description	Displays a brief description of the project.
Organization	Displays the organization in your firm that is responsible for pursuing the project.
Primary Firm	Displays the name of the primary firm associated with the project. Selecting the primary firm associates the project automatically with the selected firm. Deltek CRM prompts you whether to assign the Owner role to the newly selected firm.
Primary Contact	Displays the name of the primary contact associated with the project. Selecting the primary contact associates the project automatically with the selected contact. Deltek CRM prompts you whether to assign the Owner role to the newly selected contact.

Project Info	Description
Principal	Displays the name of the employee who is the principal-in-charge for the project. Selecting the principal associates the project automatically with the selected employee.
Project Manager	Displays the name of the employee who is the project manager for the project. Selecting the project manager associates the project automatically with the selected employee.
Area Leader	Displays the name of the employee who is the area leader for the project. Selecting the supervisor associates the project automatically with the selected employee.
Revenue	Displays the estimated monetary amount of the expected revenue if the project results in an awarded project.
Probability	Displays a number that represents the probability that the project will become a project.
Weighted Revenue	Displays the weighted revenue of the project that results from **Revenue** and **Probability**.
Currency	Displays the currency for the firm. This field only displays if you are using a multicurrency database and you have rights to the field. The available options must include currencies that are enabled for the firm (and all currencies for all firms, if **Multicompany** is enabled).
Date Opened	Displays the date on which the project was identified. Tapping this field displays the **Date Range** screen.
Date Closed	Displays the date on which the project was closed. Tapping this field displays the **Date Range** screen.
Days Open	Displays the number of days the project has been open. Tapping this field displays the **Date Range** screen.
Stage	Displays the current stage of the project.
Type	Displays the type of job associated with the project.
Source	Displays the source of the project.
Record Status	Displays the status of the project. Tapping this field displays the **Estimate** screen.
Estimated Start Date	Displays the date on which the job associated with the project is expected to begin. Tapping this field displays the **Estimate** screen.
Estimated Completion	Displays the date on which the job associated with the project is expected to be completed. Tapping this field displays the **Estimate** screen.

Project Info	Description
Contacts	Tap this field to view all contacts linked to the project.
Firms	Tap this field to view all firms linked to the project.
Employees	Tap this field to view all employees linked to the project.
Team Members	Tap this field to view all team members of the project.
Milestones	Tap this field to view all milestones linked to the contact.

Note: You can only view first level association information for **Contacts**, **Firms**, and **Employees** when tapping on a record from another record. For example, if you tap a contact while viewing a firm record, you would not see a list of all the opportunities associated to that contact.

Note: Deltek CRM does not include address information for opportunities.

Filter Projects

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

- **Active** — Tap this tab to view all active project records. This is the default search.
- **Mine** — Tap this tab to view all projects associated with your employee record.
- **Recent** — Tap this tab to view the 25 most recently accessed project records.
- **All** — Tap this tab to view all projects that match your search entry.

Add a Project

You can also add a project from a contact (on **Details**, tap and tap **Project** under **Create New**) or firm record (on **Firm**, tap and tap **Project** under **Create New**).

1. Tap , and tap **Projects**.
2. On **Projects**, tap .
3. On **Add Project**, enter or select the appropriate values, and tap **Save**.

Edit a Project

1. Tap , and tap **Projects**.
2. On **Projects**, search for the project to edit.
3. On **Details**, tap .
4. On Edit **Project**, edit the necessary fields, and tap **Save**.

> **Note:** You cannot change the primary contact and firm of an existing project record.

Delete a Project

1. Tap , and tap **Projects**.
2. On **Projects**, search for the project to delete, and tap .
3. On E**dit Project**, tap **Delete Project**.
4. Tap **Delete Project** to confirm the deletion.

View a Milestone

1. Tap , and tap **Projects**.
2. On **Projects**, search for and tap the project record to view.
3. On **Details**, tap **Milestones**.
4. On **Milestones**, search for and tap the milestone that you want to view.

Add a Milestone

1. Tap , and tap **Projects**.
2. On **Projects**, search for and tap the project record to view.
3. On **Details**, tap **Milestones**, and tap . Alternatively, you can tap , and tap **Milestone** under **Create New**.
4. On **Add Milestone**, enter or tap appropriate details, and tap **Save**.

Edit a Milestone

1. Tap , then tap **Projects**.
2. On **Projects**, search for and tap the project record to edit.
3. On **Details**, tap **Milestones**.
4. On **Milestones**, search for and tap the milestone that you want to view.
5. On **Milestone Details**, tap .
6. On **Edit Milestone**, enter or tap appropriate details, and tap **Save**.

Delete a Milestone

1. Tap , then tap **Projects**.
2. On **Projects**, search for and tap the project record to edit.
3. On **Details**, tap the **Milestones** field.
4. On **Milestones**, search for and tap the milestone that you want to view.
5. On **Milestone Details**, tap .
6. On **Edit Milestone**, tap **Delete Milestone**.
7. Tap **Delete Milestone** to confirm.

Associations

You can link one or more records to a new or an existing record and define relationships between the linked records on the **Association** screen.

Note: You can view, add, and edit associations on the **Opportunities** screen of either the **Details** or **Firm Info** screen.

Associate a Record to a New Record

1. Tap , and tap **Contacts**, **Firms**, or **Projects**.
2. Search for and tap the record that you want to view.
3. Tap , and under **Create New**, tap any of the following record types:
   - **Project** – on the **Details** (from **Contacts**) or **Firm** (from **Firms**) screen
   - **Firm** – on the **Details** screen (from **Projects**)
   - **Contact** – on the **Firm** (from **Firms**) or **Details** (from **Projects**) screen
4. Enter or select appropriate information, and tap **Save**.
5. Enter or select the role information in the following fields, and tap **Save**:
   - **Role** — Tap this field, select a role for a project, and tap **Done**.
   - **Role Description** — Tap this field, and enter a description.

Associate a Record to an Existing Record

1. Tap , and tap **Contacts**, **Firms**, or **Projects**.
2. Search for and tap the record that you want to view.
3. Tap and, under **Associate Existing**, tap any of the following record types:
   - **Project** – on **Details** (from **Contacts**) or **Firm** (from **Firms**) screen
   - **Firm** – on **Details** (from **Projects**)
   - **Contact** – on **Firm** (from **Firms**) or **Details** (from **Projects**) screen

   You can also use the search field for an existing record.
4. From the list, tap the record.
5. Enter or select the role information in the following fields, and tap **Save**:
   - **Role** — Tap this field, select a role for a project, and tap **Done**.
   - **Role Description** — Tap this field, and enter a description.

Edit an Association

1. Tap , and tap **Contacts**, **Firms**, or **Projects**.
2. Search for the record that you want to update, and tap it.
3. Tap beside the **Contacts**, **Firms**, or **Projects** field.
4. Tap beside the record name for the association that you want to edit.
5. Update the role information, and tap **Done**.
6. Tap **Save**.

Remove an Association

1. Tap , and tap **Contacts**, **Firms**, or **Projects**.
2. Search for the record which association you want to remove, and tap it.
3. Tap beside the **Contacts**, **Firms**, or **Projects** field.
4. Tap beside the record name for the association that you want to delete.
5. On **Association**, tap **Remove Association**.

Activities

Deltek CRM allows you to view calendar, task, and other activities. By default, activities for today and the next seven days display. If you scroll up, Deltek CRM displays activities from the previous week. If you scroll down, it displays activities for the next week.

> **Note:** Deltek CRM does not allow you to edit a recurring activity.

View Calendar Events or Tasks

1. Tap , and tap **Activities**.
2. On **Activities**, tap **All**, **Events**, or **Tasks**, depending on the list you want to view.
3. Scroll through the list to view all available events.
   - Tap beside each line to view **Activity Details**.
   - Tap to view the activities for the current day.
   - Tap and tap **Show Completed** to view completed activities.
   - Search for an appointment by entering part of the appointment subject in the Search field and then tap Search on the keyboard. All appointments associated with your search within a year time frame entry display on the screen. To display all available appointments, tap the Search field to display the keyboard and then tap Search without using a search entry.

   > **Note:** Scroll up to view activities from the previous week or scroll down to view activities for the next week.

Add an Activity

1. Tap , and tap **Activities**.
2. On **Activities**, tap .
3. On **Add Activity**, tap or enter necessary details. **Subject** and **Type** are required fields.
4. Tap **Save** or **Save and Create a Follow-up**.

   > **Note:** Tapping the **Save and Create Follow-up** button saves your changes you made to **Add Activity** and creates a copy of the activity for a follow-up. It copies all fields from the original activity, except for the **Start Date/Time** and **End/Date Time** fields. The values of these fields default to today and the next half hour, respectively.

Edit an Activity

You cannot edit a recurring activity.

1. Tap , and tap **Activities**.
2. On **Activities**, tap the activity you want to edit, and tap .
3. On **Edit Activity**, tap or enter the necessary details.
4. Tap **Save** or **Save and Create a Follow-up**.

Set a Reminder for an Activity

Activity reminders only work in Deltek Vantagepoint and not in the mobile application. Tapping **Reminder** on **Edit Activity** displays a warning message informing you about it. Tapping **OK** on the message only allows you to set a reminder for a particular activity, but Deltek CRM does not display the corresponding popup reminder.

Send a Message to Attendees

1. Tap , then tap **Contacts**, **Companies**, or **Project**.
2. Scroll through the list and tap the contact, firm, or project that you want to update.
3. On **Details** or **Firm**, tap **Activities**.
4. On **Activities**, tap the activity that you need.
5. On **Activity Details**, tap , and tap **Email Employees**, **Email Contact**, or **Email Employees and Contact**, depending on the attendees that you want to invite.
6. Verify the information about the activity. To change details (for example, meeting start and end dates, note, and attendees), tag on **Activity Details**.
7. On **New Message**, tap **Send**.

Settings

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

Change Search Result Sorting

1. Tap , and tap **Settings**.
2. Tap beside the **Display By** field.
3. Select a sort setting from the list.

Change PIN

1. Tap , and **Settings**.
2. Tap **Change PIN**.
3. On **Change PIN**, enter your current password, and tap **Done**.
4. Enter your PIN, and reenter it to confirm.

Modify Server URL

1. Tap , and **Settings**.
2. Tap **Forget Me on this Device**. All options and favorites are lost.
3. On the login screen, tap **Server URL**.
4. In **Server**, tap to delete the current value, and enter the new URL.
5. Tap **Connect**.

Enable/Disable Usage Tracking

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

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

1. Tap , and tap **Settings**.
2. Use the **Usage Tracking** slider to enable (**ON**) or disable (**OFF**) usage tracking.

Configure Deltek CRM Settings

1. Tap , and tap **Settings**.
2. You can modify the following:
   - **Display By** – To change the search result sorting (by **First, Last** or **Last, First**), tap beside the **Display By** field.
   - **Logged User** – To change the current user, tap **Forget Me on this Device**, and log in again. All options and favorites are lost.
   - **Database** – To change the current database to which you are logged in, tap **Forget Me on this Device** and then log in again. All options and favorites are lost.
   - **Usage Tracking** – Slide to turn on or off usage tracking using Google Analytics. When enabled, Google Analytics receives information about your use of Deltek CRM (for example, the number of times you access the application). Deltek uses this information to determine what features are being used in the application. No confidential information (such as firms and user names) is tracked. This anonymous information is only available to Deltek and is not publicly available.
   - **Show Pictures** – To display or hide pictures of your contacts, toggle this switch to **ON** or **OFF**, respectively.
   - **Help** – Tap to access the Deltek CRM help. You can also **Help** access by tapping , and tapping **Help**.
   - **Privacy Policy** – Tap to view the Legal Notices and Privacy Statement information page of Deltek.
   - **About** – Tap to view the device and operating system information, which includes the following:
     - Device Type
     - Operating System
     - User Agent Name and Version
     - Application (Native App or Web App) Version
     - Deltek CRM Server Version
     - Web Service Version
     - Deltek Vantagepoint System Version
     - Web App Build Version

     You can also send the same information to an email address by tapping **Email Info**. This information may be requested by Deltek support if you have an issue with the application.
   - **Change PIN** – Tap this button to create a new PIN code. Tapping this button directs you to the **Change PIN** screen, where you need to enter your password first before you can create the new PIN.

- **Log Out** – When you close Deltek CRM on the device, there is a timeout period during which you do not have to enter your password or PIN when you reopen the application. After the timeout period expires, the application logs you out automatically. You must enter your PIN when you reopen it. You can, however, tap **Log Out** to force the logout before the timeout period expires.

  You can also log out by tapping , and tapping **Log Out**.

- **Forget Me on this Device** – Tap to delete all information details from the application, requiring user ID, password, and database on the next login. All options and favorites are lost.

Appendix: If You Need Assistance

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

Customer Services

For over 30 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 Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center 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 Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

Additional Documentation

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 Support Center.

Document Name	Description
Deltek Vantagepoint Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.
Deltek Vantagepoint Installation and Maintenance Guide	This document contains installation requirements and procedures to successfully install. set up, and upgrade Deltek Vantagepoint as well as the mobile versions.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com