

Deltek Touch CRM for Ajera CRM

User Guide

September 2017

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Contents

- Overview 1
 - Mobile Device Requirements 1
- Getting Started..... 2
 - Install Touch CRM..... 2
 - Log On to Touch CRM 2
 - Security PIN 3
 - Log Out of Touch CRM 3
 - Change User 3
 - Closing Touch CRM 4
- Screen Display..... 5
 - Field Indicators 5
 - Links 5
 - User-Defined Fields..... 6
- Contacts..... 7
 - View Contact Records..... 7
 - Contact Information 7
 - Filter Contact Records..... 8
 - Add a Contact..... 8
 - Edit Contact Information..... 9
 - Add an Opportunity to a Contact Record 9
 - View an Activity from a Contact Record..... 9
 - Add an Activity to a Contact Record 9
 - Delete a Contact Record 10
- Companies..... 11
 - View Company Records..... 11
 - Company Information 11
 - Filter Company Records 12
 - Add a Company..... 12
 - Edit a Company Record 13
 - Add an Opportunity to a Company Record 13
 - View an Activity from a Company Record..... 13
 - Add an Activity to a Company Record 13
 - Delete a Company Record 14
- Opportunities 15
 - View Opportunity Records 15

Opportunity Information.....	15
Filter Opportunities	17
Adding an Opportunity.....	17
Edit an Opportunity.....	17
View an Activity from an Opportunity Record	18
Add an Activity to an Opportunity Record	18
Delete an Opportunity	18
Associations.....	19
Associate a Record to a New Record	19
Associate a Record to an Existing Record.....	19
Edit an Association.....	20
Remove an Association	20
Calendar and Task Activities	21
View Calendar Activities.....	21
View Tasks and Activities.....	21
Adding an Activity.....	22
Editing an Activity.....	22
Setting a Reminder for an Activity.....	23
Send a Message to Attendees	23
Settings.....	24
Change Search Result Sorting.....	24
Change PIN.....	24
Modify Server URL.....	24
Enable/Disable Usage Tracking.....	24
Configure Touch CRM Settings	25

Overview

Deltek Touch CRM for Ajera CRM is a mobile application that enables you to view, add, and edit company, contact, and opportunity information for Ajera CRM from your touch screen device.



This document uses *Touch CRM* in the succeeding instances of the application name. In addition, the application name in *Apple App Store* displays *Deltek Touch CRM*.

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



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

Mobile Device Requirements

The Touch CRM application supports mobile devices that run on Apple iOS 9.0 and higher.

Getting Started

Install Touch CRM

1. In *Apple App Store*, search for the application (*Deltek Touch CRM*).
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.



Touch CRM supports Lightweight Directory Access Protocol (LDAP) authentication in a multiple domain environment.

Touch CRM does not support two-factor authentication (2FA) and multifactor authentication (MFA).



Tap **Connection Help** on the **Server URL** screen to view information about establishing connection to Touch CRM:

- The Touch Server must be installed by your administrator in order to use the Touch CRM application.
- During setup, the administrator creates a Touch Server URL, which is different than your normal Ajera CRM URL that you access through a PC.
- The Touch Server URL uses the format <https://<server>/deltektouch/ajera/crm> by default, where **<server>** refers to the host name of your Touch Server. The default URL can be changed to something else by your Ajera CRM administrator. For more information, see Deltek Knowledge Base [#73672](#).
- 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 Touch CRM

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



It tracks the number of times you access the application and how often you use certain features. Touch CRM does not track any personal or confidential data, such as user name, projects, and companies.

3. Enter your organization's Touch CRM URL using a format that your administrator provides. For example, **https://<server>/deltektouch/ajera/crm/**.



For more information about establishing connection to Touch 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**.
8. Tap **Log In**.
9. Enter a four-digit PIN code, which you will use on your succeeding logins. For more information, see [Security PIN](#).



Touch 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, Touch CRM allows 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.



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

Log Out of Touch CRM

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, Touch CRM prompts you for your PIN or password on your next login regardless of the timeout period.
- Tap , and tap **Settings**. Tap **Log Out**.



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**.

Closing Touch CRM

If you close Touch 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 Ajera CRM.



Screen Display

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

- **Contacts** — Use this feature to search, view, add, edit, or delete contact records.
- **Companies** — Use this feature to search, view, add, edit, or delete company records.
- **Opportunities** — Use this feature to search, view, add, edit or delete opportunities.
- **Calendar** — Use this feature to access and manage calendar activities. Your administrator designates the values in the **Activity Type** drop-down list as calendar, task, or other activities. This view contains just those activities with a calendar type.
- **Task and Other Activities** — Use this feature to access and view tasks and activities. Your administrator designates the values in the **Activity Type** drop-down list as calendar, task, or other activities. This view contains just those activities with a task or other type.
- **Settings** — Use this feature to access and manage configuration of Touch CRM on your device.
- **Help** — Use this feature to access the user guide for Touch 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:

- **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 editor, where the email address is automatically added as a recipient.

User-Defined Fields



Touch CRM displays all user-defined fields used in Ajera CRM on the **Misc** tab.



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 configuration.

Contacts

The **Details** 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.



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

View Contact Records

To view a contact record, enter the contact name or the company name of the contact in the **Search** field, and 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 tap **Search** without using a search entry.



Touch 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 tap **More**.

Contact Information

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

Contact Info	Description
Bus. 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	Tap this field to view and/or edit miscellaneous information about the contact.
Business	Tap this field to view the business address of the company associated with the contact in a map.
Home/Other	Tap this field to view the contact's home or alternative address in a map.

Contact Info	Description
Activities	Tap this field to view all activities linked to the contact.
Projects	Tap this field to view all projects linked to the contact.
Opportunities	Tap this field to view all opportunities linked to the contact.
Employees	Tap this field to view all employees linked to the contact.







- 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 this tab to view all active contact records. This is the default search.
- **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.
- **All** — Tap this tab to view all contact records that match your search entry.

Add a Contact

1. Open the **Add Contact** screen by taking one of the following actions:
 - Tap , and tap **Contacts**. Tap .
 - From a company or opportunity record, tap , and select **Contact** under **Create New**.
2. Tap the **First Name**, **Last Name**, and **Email** fields to enter the corresponding information.
3. Tap  beside the **Company** field then select a company to associate with the contact.




You must provide information on at least two of the **First Name**, **Last Name**, **Email**, or **Company** 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 Ajera 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**.





4. Tap **Next**.

5. On **Add Contact**, tap the fields to enter or select the appropriate information about the contact (see [Contact Information](#)), and tap . The contact record is automatically associated with your employee record.


Edit Contact Information

1. Tap , and tap **Contacts**.
2. Search for the contact record to edit.
3. Tap the contact record, and tap .
4. Edit the necessary fields, and tap .




Add an Opportunity to a Contact Record

1. Tap , and tap **Contacts** to search for the contact record to edit.
2. Tap the contact record, and tap .
3. Under **Create New**, tap **Opportunity**.
4. Enter or select the appropriate values on the **Add Opportunity** screen.
5. Tap .
6. Enter the details for the association to the contact, and tap .


View an Activity from a Contact Record




1. Tap , and tap **Contacts**.
2. Search for the contact record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, search for and tap the activity that you want to view.





- To edit the activity, tap . For more information, see the “Edit an Activity Associated to a Contact, a Company, or an Opportunity” section in this document.
- To send email to contacts, employees, or all attendees, tap . For more information, see the “Send a Message to Attendees” section in this document.
- To add an activity, go to **Calendar** or **Task and Other Activities**, and tap .

Add an Activity to a Contact Record



1. Tap , and tap **Contacts**.
2. Scroll through the list and tap the contact that you want to edit.
3. On **Details**, take one of the following actions:

- Tap , and tap **Activity** under **Create New**.
 - Tap **Activity**, and tap  on **Activities**.
4. On **Add Activity**, tap or enter necessary details. **Subject, Contact, Type,** and **End/All Day** are required fields.
 5. Tap .






You can also add the activity by tapping , tapping **Calendar** or **Task and Other Activities**, and tapping .



Delete a Contact Record

1. Tap , and tap **Contacts**.
2. Search for the contact to delete, and tap .
3. Tap **Delete Contact**.
5. Tap **Delete Contact** to confirm the deletion.



- To edit the activity, tap . For more information, see the “Edit an Activity Associated to a Contact, a Company, or an Opportunity” section in this document.
- To send email to contacts, employees, or all attendees, tap . For more information, see the “Send a Message to Attendees” section in this document.
- To add an activity, go to **Calendar** or **Task and Other Activities**, and tap .

Companies

The **Company Info** screen allows you to view company information as well as to add, edit, or delete company records. To access the screen, tap  then tap **Companies**, search for a company, and tap  in the company name.



- By default, Touch CRM searches for active records only. To find inactive companies, tap **All**.
- Touch CRM honors Ajera CRM role security. Thus, you have the same access rights (such as read, edit, add, and delete) to company records in Touch CRM as you do in Ajera CRM. Contact your Touch CRM administrator for support.

View Company Records

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

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



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

Company Information

The following table lists the information that displays on the **Company Info** screen.

Company Info	Description
Name	Displays the company's name.
Market	Displays the business classification of the company.
Number	Displays the unique number for the company.
Relationship	Displays your relationship with the company, for example, Existing or Prospect .
Status	Displays the status, such as Active or Inactive , for your current relationship with the company.
Notes	Tap this field to view and/or edit miscellaneous information about the company.
Address	Tap this field to view the primary address of the company in a map.
Address List	Tap this field to view the company's other addresses in a map. Primary indicates that the address is the default address for the company.

Company Info	Description
Contacts	Tap this field to view all the contacts that are linked to the company.
Activities	Tap this field to view all the activities that are linked to the company.
Projects	Tap this field to view all the projects that are linked to the company.
Opportunities	Tap this field to view all the opportunities that are linked to the company.
Employees	Tap this field to view all the employees that are linked to the company.






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

Filter Company Records

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

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


Add a Company


1. Open the **Add Company** screen by taking one of the following actions:
 - Tap , and tap **Companies**. Tap .
 - On the **Details** screen (of **Opportunities**), tap , and tap **Company** under **Create New and Associate**.
2. Enter name of the company in the **Name** field, and tap **Next**.



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

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

3. Tap  beside the **Market**, **Number**, **Relationship**, and **Status** fields to edit the company's information.
4. Enter or select the company's information on the **Add Company** screen.
5. Tap **Done**.





6. (Optional) Tap the **Notes** field to enter additional information about the company. Tap **Done** when you finish.
7. Tap the **Add Address** field, and tap  on the **Primary Address** screen to enter an address of the company.







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

8. Tap **Done** on the **Add Company Address** screen, and tap **Back** on the **Primary Address** screen to return to the **Add Company** screen.
9. Tap .


Edit a Company Record

1. Tap , and tap **Companies**.
2. Search for the company record to edit.
3. Tap the company record, and tap .
4. Tap  in the fields to edit.
5. Modify the necessary information, and tap .


Add an Opportunity to a Company Record




1. Tap , and tap **Companies** to search for the company record to edit.
2. Tap the company record, and tap .
3. Under **Create New**, tap **Opportunity**.
4. Enter or select the appropriate values on the **Add Opportunity** screen.
5. Tap .
6. Enter the details for the association to the company, and tap .

View an Activity from a Company Record



1. Tap , and tap **Companies**.
2. Search for the company record to view.
3. On **Company Info**, tap **Activities**.
4. On **Activities**, search for and tap the activity that you want to view.

Add an Activity to a Company Record



1. Tap , and tap **Company**.

2. Scroll through the list and tap the companies that you want to edit.
3. On **Company Info**, take one of the following actions:
 - Tap , and tap **Activity** under **Create New**.
 - Tap **Activity**, and tap  on **Activities**.
4. On **Add Activity**, tap or enter necessary details. **Subject**, **Company**, **Type**, and **End/All Day** are required fields.
5. Tap .





You can also add the activity by tapping , tapping **Calendar** or **Task and Other Activities**, and tapping .

Delete a Company Record

1. Tap , and tap **Companies**.
2. Search for the company to delete, and tap .
3. Tap **Delete Company**.
4. Tap **Delete Company** to confirm the deletion.

Opportunities

The **Details** screen of an opportunity enables you to view contact information as well as add, edit, or delete opportunities. To access the screen, tap  then tap **Opportunities**, search for an opportunity, and tap  in the opportunity name.



By default, Touch CRM searches for active records only. To find inactive opportunities, tap **All**.

View Opportunity Records

To view an opportunity, enter the opportunity name in the **Search** field, and 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 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 tap **More**.

Opportunity Information

The following table lists the information that displays on the **Details** screen of an opportunity.

Opportunity Info	Description
Name	Displays the opportunity title.
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.
Primary Company	Displays the name of the primary company associated with the opportunity. Selecting the primary company associates the opportunity automatically with the selected company. Touch CRM prompts you whether to assign the Owner role to the newly selected company.
Primary Contact	Displays the name of the primary contact associated with the opportunity. Selecting the primary contact associates the opportunity automatically with the selected contact. Touch CRM prompts you whether to assign the Owner role to the newly selected contact.
Principal	Displays the name of the employee who is the principal-in-charge for the opportunity. Selecting the principal associates the opportunity automatically with the selected employee.

Opportunity Info	Description
Project Manager	Displays the name of the employee who is the project manager for the opportunity. Selecting the project manager associates the opportunity automatically with the selected employee.
Supervisor	Displays the name of the employee who is the supervisor for the opportunity. Selecting the supervisor associates the opportunity automatically with the selected employee.
Revenue	Displays the estimated monetary amount of the expected revenue if the opportunity results in an awarded project.
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 Revenue and Probability .
Currency	Displays the functional currency for the company. 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 company (and all currencies for all companies, if MultiCompany is enabled).
Date Opened	Displays the date on which the opportunity was identified. Tapping this field displays the Date Range screen.
Date Closed	Displays the date on which the opportunity was closed. Tapping this field displays the Date Range screen.
Days Open	Displays the number of days the opportunity has been open. Tapping this field displays the Date Range screen.
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. Tapping this field displays the Estimate screen.
Estimated Start Date	Displays the date on which the job associated with the opportunity is expected to begin. Tapping this field displays the Estimate screen.
Estimated End Date	Displays the date on which the job associated with the opportunity is expected to be completed. Tapping this field displays the Estimate screen.
Vendor/Partners	Tap this field to view all vendors or partners linked to the opportunity.
Contacts	Tap this field to view all contacts linked to the opportunity.

Opportunity Info	Description
Activities	Tap this field to view all activities linked to the opportunity.
Companies	Tap this field to view all companies linked to the opportunity.
Employees	Tap this field to view all employees linked to the opportunity.



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



Touch CRM and Ajera CRM do not include address information for opportunities.




Filter Opportunities

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




- **Active** — Tap this tab to view all active opportunity records. This is the default search.
- **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.
- **All** — Tap this tab to view all opportunities that match your search entry.

Adding an Opportunity


You can open the **Add Opportunity** screen by taking one of the following actions:



- Tapping  on **Opportunities**.
- Tapping  on the **Details** screen (of **Contacts**), and tapping **Opportunity** under **Create New**. This action creates a new opportunity and associates it to the contact.
- Tapping  on the **Company Info** screen, and tapping **Opportunity** under **Create New**. This action creates a new opportunity and associates it to the company.

Add an Opportunity on Opportunity Screen

1. Tap , and tap **Opportunities**.
2. Tap .
3. Enter or select the appropriate values on the **Add Opportunity** screen.
4. Tap .

Edit an Opportunity


1. Tap , and tap **Opportunities**.

2. Search for the opportunity to edit.
3. Tap the opportunity, and tap .
4. Edit the necessary fields, and tap .







You cannot change the primary contact and company of an existing opportunity record.

View an Activity from an Opportunity Record

1. Tap , and tap **Opportunities**.
2. Search for the opportunity record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, search for and tap the activity that you want to view.



Add an Activity to an Opportunity Record

1. Tap , and tap **Opportunities**.
2. Scroll through the list and tap the opportunity that you want to edit.
3. On **Details**, take one of the following actions:
 - Tap , and tap **Activity** under **Create New**.
 - Tap **Activity**, and tap  on **Activities**.
4. Under **Create New**, tap **Activity**.
5. On **Add Activity**, tap or enter necessary details. **Subject**, **Company**, **Type**, and **End/All Day** are required fields.
6. Tap .



You can also add the activity by tapping , tapping **Calendar** or **Task and Other Activities**, and tapping .

Delete an Opportunity

1. Tap , and tap **Opportunities**.
2. Search for the opportunity to delete, and tap .
3. Tap **Delete Opportunity**.
4. Tap **Delete Opportunity** to confirm the deletion.





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.





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


Associate a Record to a New Record

1. Tap , and tap **Contacts**, **Companies**, or **Opportunities**.
2. Search for the record that you want to view, and tap the name.
3. Tap  to display the context menu.
4. Under **Create New**, tap any of the following record types:
 - **Opportunity** – on the **Details** (for **Contacts**) or **Company Info** (for **Companies**) screen
 - **Company** – on the **Details** screen (for **Opportunities**)
 - **Contact** – on the **Company Info** (for **Companies**) or **Details** (for **Opportunities**) screen
5. Enter or select appropriate information, and tap .
6. Enter or select the role information in the following fields, and tap :
 - **Role** — Tap this field, select a role for an opportunity, and tap **Done**.
 - **Role Description** — Tap this field, and enter a description.

Associate a Record to an Existing Record





1. Tap , and tap **Contacts**, **Companies**, or **Opportunities**.
2. Search for the record that you want to view, and tap the name.
3. Tap  to display the context menu.
4. Under **Associate Existing**, tap any of the following record types:
 - **Opportunity** – on the **Details** (for **Contacts**) or **Company Info** (for **Companies**) screen
 - **Company** – on the **Details** screen (for **Opportunities**)
 - **Contact** – on the **Company Info** (for **Companies**) or **Details** (for **Opportunities**) screen

You can also use the search field for an existing record.




5. From the list, tap the record.
6. Enter or select the role information in the following fields, and tap :

- **Role** — Tap this field, select a role for an opportunity, and tap **Done**.
- **Role Description** — Tap this field, and enter a description.

Edit an Association

1. Tap , and tap **Contacts, Companies, or Opportunities**.
2. Search for the record that you want to update, and tap it.
3. Tap  beside the **Contacts, Companies, or Opportunities** 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 .

Remove an Association

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

Calendar and Task Activities




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



In the configuration of your Deltek CRM product, 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 Other Activities** screen.

If an activity is recurring in your Deltek CRM core product and you tap an instance of that activity in Touch CRM, you can only edit one occurrence of the activity. If you need to update all occurrences, edit the activity in the core product.




View Calendar Activities

1. Tap , and tap **Calendar**.
2. Take one of the following actions:
 - Tap  beside each line to view **Activity Details**.
 - Tap  to view the activities for the current day.
 - Search for an appointment by entering part of the appointment subject in the Search field, and 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 tap Search without using a search entry.



Scroll up to view activities from the previous week or scroll down to view activities for the next week.

View Tasks and Activities



1. Tap , and tap **Tasks and Other Activities**.
2. Take one of the following actions:
 - Tap **All** or **Incomplete** to display corresponding activities based on the selected filter.
 - Tap  to view the tasks and activities for the current day.
 - Search for an activity by entering part the activity subject in the Activity Search field, and tap Search on the keyboard. All activity associated with your search within a year time frame entry display on the screen. To display all available activities, tap the Search field to display the keyboard, and tap Search without using a search entry.
3. Scroll through the list. You can tap  each line to view activity details.



Scroll up to view activities from the previous week or scroll down to view activities for the next week.

Adding an Activity



You can add an activity in any of the following ways:

- Tapping  on **Calendar**.
- Tapping  on **Tasks and Other Activities**.
- Tapping **Activity** under **Create New** of a contact, a company, or an opportunity record.





This section only discusses adding a calendar and task activities. The instruction on adding the activity to a particular record is discussed in the corresponding section of this document.

Add a Calendar Activity

1. Tap , and tap **Calendar**.
2. On **Calendar**, 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**.


Add a Task Activity

1. Tap , and tap **Task and Other Activities**.
2. On **Task and Other 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**.



Tapping the **Save and Create Follow-up** button saves your changes you made to the **Add Details** screen 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.



Editing an Activity

You can edit an activity by tapping  on **Activity Details** from **Calendar, Task and Other Activities**, or a contact, a company, or an opportunity record.





This section only discusses adding a calendar and task activities. The instruction on editing the activity to a particular record is discussed in the corresponding section of this document.

Edit a Calendar Activity

1. Tap , and tap **Calendar**.
2. On **Calendar**, search for and tap the activity that you want to edit.
3. On **Activity Details**, tap .

4. On **Edit Activity**, tap or enter the necessary details.
5. Tap **Save** or **Save and Create a Follow-up**.




Edit a Task Activity

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

Setting a Reminder for an Activity

Activity reminders only work in your core CRM product on your desktop. 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 Touch CRM does not display the corresponding popup reminder.



Send a Message to Attendees

1. Tap , and tap **Contacts, Companies, or Opportunity**.
2. Scroll through the list and tap the contact, company, or opportunity that you want to update.
3. On **Details** or **Company Info**, tap **Activities**.
4. On **Activities**, tap the activity that you need.
5. On **Activity Details**, tap , and tap **Email to Employees, Email to 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), tap  on **Activity Details**.
7. On **New Message**, tap **Send**.


Settings

Use the information in this section to configure Touch 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 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**.
- 5.

Enable/Disable Usage Tracking




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 company and contact names.

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


Configure Touch 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 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 Touch 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 projects, companies, or user names) is tracked. This anonymous information is only available to Deltek and is not publicly available.
 - **Help** – Tap to access the Touch 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
 - Touch Server Version
 - Web Service Version
 - Core System 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 Touch 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.



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