Deltek Know more. Do more.™

Deltek Touch CRM for Vision 1.4

User Guide

January 2015

This edition published January 2015.

Contents

Overview

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

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, Apple App Store*, and *Windows Store* displays *Deltek Touch CRM for Vision*.

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 Vision. You can use the application with lower versions of Vision 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 for Vision Technical Installation Guide.*

Mobile Device Requirements

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

- Apple iOS 7 and higher
- Android 4.x and higher
- Windows Phone 8.1 and higher

If You Need Assistance

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

Customer Services

For over 20 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 Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- 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
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions

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 do not have a username and password for the Customer Care Connect site, contact your firm's Touch CRM administrator.

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 Release Notes	This document contains a summary of the technical considerations, major features, and known issues of the application.
Deltek Touch CRM for Vision Installation Guide	This document provides instructions for the installation and configuration of application.

Getting Started

Install Touch CRM

1. On the *Google Play, Apple App Store*, or *Windows Store*, search for the application (*Deltek Touch CRM for Vision).*
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.

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 Vision URL that you access through a PC.
- The Touch server URL uses the format **https://<server>/deltektouch/vision/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 Vision 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 clients.

3. Enter your organization's Touch CRM URL using a format that your administrator provides. For example, **https://<server>/deltektouch/vision/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, then scroll through the list.

7. Tap a database, then tap **Done**.
8. Tap **Log In**. For initial login, you can either create a PIN or skip PIN creation. 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 either create a PIN or skip PIN creation.

- To create a PIN, enter a four-digit PIN, then re-enter it to confirm. Instead of entering your password on your next login, you need to enter your PIN.
- To skip PIN creation, tap **Skip PIN Setup**. You have to enter your password each time you log in to the application.

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 Vision Server. You then have the option to log on to Vision using either Windows Authentication or a standard user name and password. Logging on with domain credentials (either for the Vision server or database) requires you to use a PIN.

When using domain credentials, the **Skip PIN Setup** button does not display.

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 , then 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 , then tap **Settings**. Tap **Log Out**.

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

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 or password. If your session has timed out, you will be prompted to enter your PIN or password the next time the application communicates with Vision.

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.
- **Clients** — Use this feature to search, view, add, edit, or delete client records.
- **Opportunities** — Use this feature to search, view, add, edit or delete opportunities.
- **Calendar** — Use this feature to access and manage calendar activities.
- **Task and Other Activities** — Use this feature to access and view tasks and activities.
- **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.

Known Issues:

- On Windows Phone devices, scrolling response is sometimes slow in notes fields due to a defect in a third party tool used in Touch CRM.
- On Android devices, when you edit a field after you saved a record and then scroll up or down, the view is sometimes limited to the bottom part of the interface.

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 Vision on the **UDF** tab. Including empty fields helps you verify instantly that certain UDFs already exist.

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, then tap in the contact name.

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

View Contact Records

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

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 then tap **More**.

Contact Information

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

Contact Info	Description
Business 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	Displays miscellaneous information about the contact.
Business	Displays the business address of the client associated with the contact.
Home/Other	Displays the contact’s home or alternative address.
Activities	Lists all activities linked to the contact.
Projects	Lists all projects linked to the contact.

Contact Info	Description
Opportunities	Lists all opportunities linked to the contact.
Employees	Lists 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 , then tap **Contacts**. Tap .
   - From a client or opportunity record, tap and then select **Contact** under **Create New**.
2. Tap the **First Name**, **Last Name**, and **Email** fields to enter the corresponding information.
3. Tap beside the **Client** field then select a client to associate with the contact.

   You must provide information on at least two of the **First Name**, **Last Name**, **Email**, or **Client** 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 Vision 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), then tap Save. The contact record is automatically associated with your employee record.

Edit Contact Information

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

Delete a Contact Record

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

Clients

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

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

  Currently, Touch CRM does not support record-level security.

View Client Records

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

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

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

Client Information

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

Client Info	Description
Type	Displays the business classification of the client.
Notes	Displays miscellaneous information about the client.
Address	Displays the primary address of the client.
Address List	Lists the client's addresses. **Primary** indicates that the address is the default address for the client.
Contacts	Lists all the contacts that are linked to the client.
Activities	Lists all the activities that are linked to the client.
Projects	Lists all the projects that are linked to the client.
Opportunities	Lists all the opportunities that are linked to the client.
Employees	Lists all the employees that are linked to the client.

The **Activities** and **Projects** fields will be fully functional in future releases.

You can only view first level association information for **Contacts**, **Opportunities** and **Employees**.

Filter Client Records

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

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

Add a Client

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

   If the client name you entered is similar to an existing client record, Touch CRM lists those client records.
   - To append an existing record, select the client record from the list.
   - To create a new record, tap **Add New Client**.
3. Tap beside the **Type**, **Number**, **Relationship**, and **Status** fields to edit the client's information.
4. Enter or select the client's information on the **Add Client** screen.
5. Tap **Done**.
6. (Optional) Tap the **Notes** field to enter additional information about the client. Tap **Done** when you finish.
7. Tap the **Add Address** field, then tap on the **Primary Address** screen to enter an address of the client.

   After you create an address, you cannot change the address description using Touch CRM.
8. Tap **Done** on the **Add Client Address** screen, then tap **Back** on the **Primary Address** screen to return to the **Add Client** screen.
9. Tap Save.

Edit a Client Record

1. Tap , then tap **Clients**.
2. Search for the client record to edit.
3. Tap the client record and then tap .
4. Tap in the fields to edit.
5. Modify the necessary information and then tap Save.

Delete a Client Record

1. Tap , then tap **Clients**.
2. Search for the client to delete and then tap .
3. Tap **Delete Client**.
4. Tap **Delete Client** 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**.
- Touch CRM honors Vision role security. Thus, you have the same access rights (read, edit, add, delete, etc.) to opportunity records in Touch CRM as you do in Vision. Contact your Touch CRM administrator for support.

  Currently, Touch CRM does not support record-level security.

View Opportunity Records

To view an opportunity, enter the opportunity name in the **Search** field and then 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 then 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 then 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 Client	Displays the name of the primary client associated with the opportunity. Selecting the primary client associates the opportunity automatically with the selected client. Touch CRM prompts you whether to assign the Owner role to the newly selected client.
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 Info	Description
	opportunity. Selecting the principal associates the opportunity automatically with the selected employee.
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	Lists all vendors or partners linked to the opportunity.

Opportunity Info	Description
Contacts	Lists all contacts linked to the opportunity.
Activities	Lists all activities linked to the opportunity.
Clients	Lists all clients linked to the opportunity.
Employees	Lists all employees linked to the opportunity.

The **Vendor/Partners** and **Activities** fields will be fully functional in future releases.

You can only view first level association information for **Contacts**, **Clients**, and **Employees**.

Touch CRM and Vision does 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 then tapping **Opportunity** under **Create New**. This action creates a new opportunity and associates it to the contact.
- Tapping on the **Client Info** screen and then tapping **Opportunity** under **Create New**. This action creates a new opportunity and associates it to the client.

Add an Opportunity on Opportunity Screen

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

Add an Opportunity on Details Screen

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

Add an Opportunity on Client Info Screen

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

Edit an Opportunity

1. Tap , then tap **Opportunities**.
2. Search for the opportunity to edit.
3. Tap the opportunity and then tap .
4. Edit the necessary fields and then tap Save.

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

Delete an Opportunity

1. Tap , then tap **Opportunities**.
2. Search for the opportunity to delete and then 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 **Client Info** screen.

Associate a Record to a New Record

1. Tap , then tap **Contacts**, **Clients**, or **Opportunities**.
2. Search for the record that you want to view, then 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 **Client Info** (for **Clients**) screen
   - **Client** – on the **Details** screen (for **Opportunities**)
   - **Contact** – on the **Client Info** (for **Clients**) or **Details** (for **Opportunities**) screen
5. Enter or select appropriate information, then tap Save.
6. Enter or select the role information in the following fields, then tap Save:
   - **Role** — Tap this field, select a role for an opportunity, then tap **Done**.
   - **Role Description** — Tap this field, then enter a description.

Associate a Record to an Existing Record

1. Tap , then tap **Contacts**, **Clients**, or **Opportunities**.
2. Search for the record that you want to view, then 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 **Client Info** (for **Clients**) screen
   - **Client** – on the **Details** screen (for **Opportunities**)
   - **Contact** – on the **Client Info** (for **Clients**) 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, then tap Save:
   - **Role** — Tap this field, select a role for an opportunity, then tap **Done**.
   - **Role Description** — Tap this field, then enter a description.

Edit an Association

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

Remove an Association

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

Calendar

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.

View Calendar Activities

1. Tap , then 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 then tap Search on the keyboard. All appointments associated with your search 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.

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

Tasks and Activities

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.

View Tasks and Activities

1. Tap , then 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 then tap Search on the keyboard. All activity associated with your search entry display on the screen. To display all available activities, tap the Search field to display the keyboard and then 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.

Settings

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

Change Search Result Sorting

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

Enable PIN

To make accessing Touch CRM easier on your next login, you can use a four-digit security PIN instead of your user name and password.

1. Tap , then tap **Settings**.
2. In **Use PIN**, slide the toggle switch to **ON**.
3. Enter your password, tap **OK**.
4. Enter your PIN, then reenter it to confirm.

Disable PIN

Disabling your security PIN requires you to enter your password each time you access the Touch CRM. If you use Windows Authentication, this option is not available.

1. Tap , then tap **Settings**.
2. In **Use PIN**, slide the toggle switch to **OFF**.

Change Security PIN

1. Tap , then tap **Settings**.
2. Tap beside the **Change PIN** field.
3. Enter your password and then tap **OK**.
4. Enter a four-digit security PIN and then reenter it to confirm.

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 client and contact names.

1. Tap , then tap **Settings**.

2. Use the **Usage Tracking** slider to enable (**ON**) or disable (**OFF**) usage tracking.

Configure Touch CRM Settings

1. Tap , then 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.
   - **Use PIN** – Slide to turn on or off. Setting it to **ON** will require you to enter a 4 digit PIN instead of your Vision password on your next login. If you use Windows Authentication, you cannot turn this off.
   - **Change PIN** – To change the current PIN, tap beside the **Change PIN** field and then enter a four-digit security PIN.
   - **Logged User** – To change the current user, tap **Forget Me on this Device**, then 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 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, clients, 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 , then 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.
   - **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 or password 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 , then 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.

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.®

deltek.com