Deltek Touch CRM for Deltek CRM

User Guide

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Contents

Overview

Deltek Touch CRM is a mobile application that enables you to view, add, and edit company, contact, and opportunity information for Deltek 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.

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 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 Deltek CRM URL that you access through a PC.
- The Touch Server URL uses the format https://**<server>**/touch by default, where **<server>** refers to the host name of your Touch Server. If you do not know your Touch URL, contact your system administrator.
- 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 and companies.

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

   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 Deltek CRM Server. You then have the option to log on to Deltek CRM using either Windows Authentication or a standard user name and password. Logging on with domain credentials (either for the Deltek CRM 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 , 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 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 Deltek 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.
- **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 Deltek 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 Deltek CRM role security. Thus, you have the same access (such as read, edit, add, and delete) to contact records in Touch CRM as you do in Deltek CRM.

View Contact Records

To view a contact record, enter the contact name or the client 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
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	Tap this field to view and/or edit miscellaneous information about the contact.
Business	Tap this field to view the business address of the client 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
Touchpoints	Tap this field to view all touchpoints 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 client 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 **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 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.
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 Save. 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 Save.

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 Save.
6. Enter the details for the association to the contact, and tap Save.

View a Touchpoint from a Contact Record

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

You can add a touchpoint in two ways. For more information, see the “Add a Touchpoint to a Contact, a Company, or an Opportunity Record” section in this document.

To edit the touchpoint, tap . For more information, see the “Edit a Touchpoint 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.

Delete a Contact Record

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

6. On **Edit Touchpoint**, tap **Delete Touchpoint**.
7. Tap **Delete Touchpoint** to confirm.

Companies

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

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

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.
Contacts	Tap this field to view all the contacts that are linked to the company.

Company Info	Description
Touchpoints	Tap this field to view all touchpoints linked to the company.
Opportunities	Lists all the opportunities that are linked to the company.
Employees	Lists all the employees that are linked to the company.

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.

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 Save.

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 Save.

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 Save.
6. Enter the details for the association to the company, and tap Save.

View a Touchpoint from a Company Record

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

You can add a touchpoint in two ways. For more information, see the “Add a Touchpoint to a Contact, a Company, or an Opportunity Record” section in this document.

To edit the touchpoint, tap . For more information, see the “Edit a Touchpoint” 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.

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 view 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
Milestones	Tap this field to view all milestones linked to the contact.
Touchpoints	Tap this field to view all touchpoints 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 Deltek CRM 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 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 Save.

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 Save.

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

View a Touchpoint from an Opportunity Record

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

You can add a touchpoint in two ways. For more information, see the “Add a Touchpoint to a Contact, a Company, or an Opportunity Record” section in this document.

To edit the touchpoint, tap . For more information, see the “Edit a Touchpoint” 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.

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.

Touchpoints and Milestones

View Touchpoint Details

1. Tap , and tap **Contacts**, **Companies**, or **Opportunity**.
2. Scroll through the list and tap the contact, client, or opportunity that you want to view.
3. On **Details** or **Company Info**, tap **Touchpoints**.
4. On **Touchpoints**, search for and tap the touchpoint that you want to view.
5. On **Touchpoint Details**, you can tap **Notes** to add more details.

Add a Touchpoint to a Contact, a Company, or an Opportunity Record

1. Tap , and tap **Contacts**, **Companies**, or **Opportunity**.
2. Scroll through the list and tap the contact, company, or opportunity that you want to view.
3. On **Details** or **Company Info**, take one of the following actions:
   - Tap **Touchpoints**, and tap .
   - Tap , and tap **Touchpoint** under **Create New**.
4. On **Add Touchpoint**, enter or tap appropriate details, and tap **Save** or **Save and Create Follow-up**.

Edit a Touchpoint Associated to a Contact, a Company, or an Opportunity Record

1. Tap , and tap **Contacts**, **Companies**, or **Opportunity**.
2. Scroll through the list and tap the contact, client, or opportunity that you want to view.
3. On **Details** or **Company Info**, tap **Touchpoints**.
4. On **Touchpoints**, search for and tap the touchpoint that you want to edit.
5. On **Touchpoint Details**, tap .
6. On **Edit Touchpoint**, enter or tap appropriate details, and tap **Save** or **Save and Create Follow-up**.

Delete a Touchpoint

1. Tap , and tap **Contacts**, **Companies**, or **Opportunity**.
2. Scroll through the list and tap the contact, client, or opportunity that you want to update.
3. On **Details** or **Company Info**, tap **Touchpoints**.
4. On **Touchpoints**, search for and tap the touchpoint that you want to delete.

5. On **Touchpoint Details**, tap .
6. On **Edit Touchpoint**, tap **Delete Touchpoint**.
7. Tap **Delete Touchpoint** to confirm.

Send Touchpoint Details to Attendees

1. Tap , and tap **Contacts**, **Companies**, or **Opportunity**.
2. Scroll through the list and tap the contact, client, or opportunity that you want to update.
3. On **Details** or **Company Info**, tap **Touchpoints**.
4. On **Touchpoints**, tap the touchpoint that you need.
5. On **Touchpoint Detais**, tap , and tap **Email Employees**, **Email Contact**, or **Email Employees and Contact**, depending on the attendees that you want to invite.
6. In your default email application, verify the details of your message, and tap **Send**.

View Milestone Details

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

Add a Milestone

1. Tap , and tap **Opportunities**.
2. Search for the opportunity record to view.
3. On **Details**, take one of the following actions:
   - Tap **Milestones**, and tap .
   - Tap , and tap **Milestone** under **Create New**.
4. On **Add Milestone**, enter or tap appropriate details, and tap **Save**.

Edit a Milestone

1. Tap , and tap **Opportunities**.
2. Search for the opportunity record to view.
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 , and tap **Opportunities**.
2. Search for the opportunity record to view.
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.

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 Save.
6. Enter or select the role information in the following fields, and tap Save:
   - **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 Save:

- **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 Save.

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**.

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**.

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 companies and 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.

Appendix: If You Need Assistance

If you need assistance installing, implementing, or using Deltek Touch CRM, 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 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 site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Customer Care Connect site provides:

- 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 Connect Customer Forums
- 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
- Use Quick Chat to submit a question to a Customer Care analyst online

For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In.**

If you do not have a username and password for the Customer Care Connect site, contact your firm's Deltek CRM Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

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

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

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