



Deltek

Deltek
Vantagepoint®
Mobile 7.0
CRM User Guide

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Contents

Overview.....	1
Mobile Device Requirements.....	2
Getting Started.....	3
Install Mobile CRM.....	3
Log In to Mobile CRM.....	4
Using Windows Authentication.....	6
Log In Using Two-Factor Authentication (2FA).....	6
Log Out of Mobile CRM.....	8
Change User.....	9
Closing Mobile CRM.....	9
Reset a Forgotten Password.....	9
Retrieve a Forgotten User ID.....	10
QuickBooks Integration.....	10
Screen Display.....	11
Contents of the Screen Display.....	11
Field Indicators.....	12
Links.....	12
User-Defined Fields.....	12
Contacts.....	13
Access the Contact Screen.....	13
View Contact Records.....	13
Contact Information.....	13
Filter Contact Records.....	14
Status of a Contact.....	14
Add a Contact.....	14
Edit Contact Information.....	15
View a Touchpoint or Activity in a Contact Record.....	16
Add a Touchpoint to a Contact Record.....	16
Add an Activity to a Contact Record.....	17
Edit a Touchpoint or Activity in a Contact Record.....	17
Delete a Touchpoint or Activity in a Contact Record.....	18
Add a Firm to a Contact Record.....	18

Add a Project to a Contact Record.....	19
Qualify a Lead.....	19
Disqualify a Contact or New Lead.....	20
Revert a Contact to a Lead.....	20
Delete a Contact Record.....	21
Capture Business Card.....	22
ICR Technology.....	22
Add a Contact Using the Capture Business Card.....	22
Firms.....	24
Access the Firm Info Screen.....	24
View a Firm Record.....	24
View All Available Firm Records.....	24
Firm Information.....	25
Add a Firm.....	26
Add a Firm from a Project Record.....	27
Edit a Firm Record.....	27
View a Touchpoint or Activity in a Firm Record.....	27
Add a Touchpoint to a Firm Record.....	28
Add an Activity to a Firm Record.....	28
Edit a Touchpoint or Activity in a Firm Record.....	29
Delete a Touchpoint or Activity in a Firm Record.....	29
Add a Contact to a Firm Record.....	30
Add a Project to a Firm Record.....	31
Delete a Firm Record.....	31
Projects.....	32
Access the Details Screen.....	32
View Project Records.....	32
Project Information.....	32
Filter Projects.....	35
Add a Project.....	35
Edit a Project.....	36
Delete a Project.....	37
View a Touchpoint or Activity in a Project Record.....	37
Add a Touchpoint to a Project Record.....	37

Add an Activity to a Project Record.....	38
Edit a Touchpoint or Activity in a Project Record.....	38
Delete a Touchpoint or Activity in a Project Record.....	39
Add a Contact to a Project Record.....	39
Add a Firm to a Project Record.....	40
View a Milestone.....	41
Add a Milestone.....	41
Edit a Milestone.....	42
Delete a Milestone.....	42
Associations.....	43
Associate a Record to a New Record.....	43
Associate a Record to an Existing Record.....	43
View Details of an Associated Record.....	44
Edit an Association.....	44
Remove an Association.....	45
Activities.....	46
View Calendar Events or Tasks.....	46
Add an Activity.....	46
Edit an Activity.....	48
Delete an Activity.....	49
Set a Reminder for an Activity.....	49
Send a Message to Attendees.....	49
Rating and Feedback.....	51
Settings.....	52
Change Search Result Sorting.....	52
Change Your Password.....	52
Change the PIN.....	52
Modify the Server URL.....	53
Enable/Disable Fingerprint or Face ID Authentication.....	53
Configure Mobile CRM Settings.....	53

Overview

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

The official name of the application is Deltek CRM for Vantagepoint. This document only uses it at first mention. Succeeding instances of the application name display as Mobile CRM.

The application name in Apple App Store displays as Deltek CRM for Vantagepoint.

Note: SSL is a term commonly used when referring to both Secure Sockets Layer technology and its successor, Transport Layer Security (TLS). Although you may see references to SSL in this guide and in the application's user interface, all Deltek applications use current TLS protocols to provide protected connections between web servers and web browsers.

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

To use the full functionality of Mobile CRM, you must be on the latest Deltek CRM Server and Deltek Vantagepoint. You can use Mobile CRM with lower versions of these applications, but new features will not be available if you do so. Deltek CRM Server must be installed and configured using the guidelines in the *Deltek Vantagepoint Technical Installation Guide*.

Mobile Device Requirements

Review supported mobile devices.

The Mobile CRM application supports mobile devices that run on the following operating system:

- Apple iOS 15.0 and higher

Getting Started

Your Delttek CRM administrator sends you an email message containing a link that directs you to a page that displays only one link or two separate links, depending on your mobile operating system.

For iOS, the page contains two separate links. Tapping the first link directs you to the mobile application in the App Store, allowing you to download it into your device. Tapping the second link automatically populates the **Server URL** field in the downloaded application.

Install Mobile CRM

Review the steps for installing the Mobile CRM application.

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

To install Mobile CRM:

1. In Apple App Store, search for the application (Delttek CRM for Vantagepoint).
Make sure that you select the correct application because Delttek has several CRM applications for different products.
2. Download and install the application by tapping the appropriate buttons.
3. Tap the installed application and follow the screen prompts to accept the terms of agreement and usage tracking.
Mobile CRM supports Lightweight Directory Access Protocol (LDAP) authentication in a multiple domain environment.
4. To view information about establishing a connection to Delttek Vantagepoint, tap **Connection Help** on the **Server URL** screen.
 - Your administrator must install the Delttek CRM Server in order to use the Mobile CRM application.
 - During setup, the administrator creates an application URL, which is different than your normal browser URL that you access through a PC.
 - The application URL uses the following format by default, where <server> refers to the host name of your Delttek CRM Server. The default URL can be changed to something else by your Delttek Vantagepoint administrator:
`https://<yourdomain>/vantagepoint/touch/crm/visionshared/backend/vantagepointcrmurl.php`
 - On the Server URL screen, the Mobile CRM application can also populate incomplete application URL details. For example, if you enter a URL link that contains **/app** or there are missing details at the end of the URL link, the mobile application will autocomplete the link and with **touch/crm**. However, please take note of the following:
 - If the URL doesn't end with **/crm**, it will append **/touch/crm** at the end. Otherwise, it will use **/crm** instead.

- If the URL contains **/touch/**, it will replace it with **/touch/crm**.
Contact support if you continue to have connection issues.

Log In to Mobile CRM

Initial logins differ slightly from subsequent logins.

For the initial login, you specify your username and password and then configure Mobile CRM to use a PIN code, fingerprint ID, or face ID for subsequent logons.

To log in to Mobile CRM:

1. Tap **Deltak CRM for Vantagepoint**.
2. If this is the first time that you are logging in, when the application prompts you to accept the Terms and Use of Service and Usage Statistics Tracking, tap the corresponding buttons.

Attention: Starting with iOS 14.5, the Usage Statistics Tracking screen is hidden. When usage tracking is enabled, the application tracks the number of times that you access the application and how often you use certain features. Mobile CRM does not track any personal or confidential data, such as user name, projects, and clients.

3. Tap the link to either download the application from the appropriate app store or automatically populate the **Server URL** field.
The URL has the following format: `https://<yourdomain>/vantagepoint/touch/crm/visionshared/backend/vantagepointcrmurl.php`.
For more information about establishing a connection to Mobile CRM, click **Connection Help**.
4. Tap **Connect**.
TLS Certificates: Starting with Vantagepoint Mobile 5.0.1, mobile applications validate the TLS certificate used for the Touch URL against the certificate recorded on the Touch server. This ensures that users only connect to a trusted Touch URL. If you receive this error message while trying to connect: "*Insecure connection detected. Please contact your system administrator,*" contact your Vantagepoint administrator for assistance.
5. Tap the **User ID** and **Password** fields and enter the corresponding values.
6. Tap the **Database** field, and scroll through the list.
7. Tap a database, and tap **Done**.
If Single Sign-On authentication is used, the **Windows Authentication** toggle switch displays.
8. If you want to set the app to use a different language, tap the **Language** field and select the new language.
9. Tap **Log In**.
10. On the **Login** screen, tap **Using Fingerprint/Face ID** or **Using a PIN code**.
11. If face or fingerprint ID is not enabled on your device, enter a four-digit PIN code, which you will use when you next log on.

Mobile CRM remembers your user ID and selected database (and domain if Windows Authentication is being used) the next time you log on. To log in using a different user ID and database, tap **Forget Me on this Device** on **Settings**. (When you do so, your user settings and favorites will be lost.)

Fingerprint or Face ID Authentication

Fingerprint or face ID authentication identifies you, or any user, through fingerprint or face pattern recognition and then authorizes access to the application.

If the fingerprint or face ID feature was enabled on your device before you install Mobile CRM, the **Using Fingerprint/Face ID** option is available on the **Login** screen. On your initial login, you have the option to use fingerprint/face ID or a PIN code. Depending on the type of authentication that you registered on your device settings, you can use either your fingerprint and/or face ID. You can also [enable or disable the fingerprint or face ID login](#) on the **Settings** screen.

Note: For iOS users, you can use either your fingerprint (for older iOS devices) or face ID (for newer iOS devices) to access the application.

When you reach the mobile session inactivity limit, you are redirected to the Session Expired screen to re-enter your fingerprint or face ID. After logging in, you can continue working on the same screen that you were using before the session timeout occurred. However, if you incorrectly enter your fingerprint or face ID multiple times, you are logged out of the application and redirected to the **Login** screen.

When you reach the mobile session inactivity limit, you are redirected to the Session Expired screen to re-enter your fingerprint/face ID. After logging in, you can continue working on the same screen that you were using before the session timeout occurred. If you incorrectly enter your fingerprint/face ID multiple times, you are logged out of the application and redirected to the Login screen. iOS users with fingerprint authentication are redirected to the domain Login screen, while iOS users with face ID authentication are redirected to the database Login screen. However, you are redirected to the domain Login screen if you are using single sign-on (SSO) authentication.

Administrators control this feature through server-side configuration. When the administrator switches on the fingerprint/face ID feature on the server's setting, you can use this feature in Mobile CRM.

Security PIN

You can use a security PIN if the fingerprint or face ID feature is not enabled on your device.

Mobile CRM allows you to create a four-digit PIN and then re-enter the digits to confirm the PIN. Instead of entering your user name and password on your next login, you just enter your PIN.

When you reach the mobile session inactivity limit, you are redirected to the Session Expired screen to re-enter your security PIN. After logging in, you can continue working on the same screen that you were using before the session timeout occurred. However, if you incorrectly enter your security PIN three (3) times, you are logged out of the application and redirected to the Login screen. For SSO users, the domain Login screen displays first.

Using Windows Authentication

You can use Windows Authentication to log in to Mobile CRM.

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

After your Vantagepoint Administrator sets up single sign-on, you must follow a set of login steps to enable Windows Authentication. Your Administrator must give you your Microsoft Entra ID domain account username and password.

Log In Using Windows Authentication

You can log in to Mobile CRM using Windows Authentication.

To log in using Windows authentication:

1. On the **Login** screen, toggle the **Windows Authentication** switch to **On**.
The **Password** field becomes disabled.
2. In the **User ID** field, enter your Microsoft Entra ID email address, and tap **Log In**.
3. On the Microsoft dialog box that requests your password, enter your Entra ID password, and tap **Sign In**.
4. After your credentials are validated, the Deltek CRM for Vantagepoint application opens.
5. Enter a four-digit PIN and then, in response to the prompt, re-enter the digits to confirm the PIN.

When you reach the mobile session inactivity limit, you are redirected to the Session Expired screen to re-enter your security PIN. After logging in, you can continue working on the same screen before the session timeout occurred.

Attention: If you incorrectly entered your security PIN three (3) times, you are logged out of the application and redirected to the **Login** screen. Because you enabled **Windows Authentication**, you are redirected to the Microsoft Login page to re-enter your password before you can continue.

Log In Using Two-Factor Authentication (2FA)

You can only use 2FA in the mobile application if it has been configured in the Deltek Vantagepoint browser application.

You are only required to enter a 2FA code if the following options have been set up:

- The **Enable Multi-Factor Authentication Using TOTP** option is selected on the Password Policies screen.
- The **Multi-Factor Authentication** option is selected for you on the **Users** screen.

- The **Multi-Factor Authentication Configured and Confirmed** option is selected on the Users screen.

Verification Code

Review the scenarios in which you are required to enter the verification code.

You must enter the verification code:

- When you are logging in for the first time
- When you change users
- When your current password has expired and you need to use your password again
- After the Mobile PIN screen, when logging in

Set Up Two-Factor Authentication (2FA) for your Mobile Application

If the 2FA method is enabled for your mobile application, you must activate 2FA the first time that you log in.

Prerequisite: Make sure that you have the 2FA application required by your organization installed on your device.

To set up 2FA for your mobile application:

1. Log in to the Delttek Vantagepoint browser application.
2. On the next screen, with the **Enter Your Verification Code** field, tap **Set Up Multi-factor Authentication**.
3. On the Set Up Multi-factor Authentication window, scan the displayed QR code using your multi-factor authentication provider.
4. Tap **Done with the Setup**.
5. On the Confirmation window, tap **I'm Sure**.
6. Enter your six-digit verification code, and tap **Log In**.
7. Tap **Settings » Security » Users**.
8. In your user record, verify that the **Multi-Factor Authentication Configured and Confirmed** option is selected.

Log In to the Mobile Application Using the 2FA Method

You can log in to Mobile CRM using the 2FA method.

To log in using 2FA:

1. Tap your installed mobile application.
2. On the **Login** page, enter your user ID and password, and tap **Log In**.

3. On the Verification Code screen, enter your six-digit verification code (from your 2FA authenticator application), and tap **Log In**.
4. Select either **Using a Fingerprint/Face ID** or **Using a PIN code**.
When you reach the mobile session inactivity limit, you are redirected to the Session Expired screen to re-enter your security PIN or fingerprint/face ID. After logging in, you can continue working on the same screen that you were using before the session timeout occurred.

Attention: If you incorrectly enter your security PIN or fingerprint/face ID multiple times, you are logged out of the application and redirected to the Login screen. Since you are using the 2FA method, you are prompted to enter a verification code after entering your login credentials.

Enter a New 2FA Verification Code

You can enter a new 2FA Verification Code if your code has expired.

If your 2FA Verification code has expired (because you used **Change Password**, **Change User**, **Forget me on this device**, or **Reset PIN**), you need to specify a new code.



To enter a new 2FA verification code:

1. On the login page, enter your user ID and password, and tap **Log In**.
2. On the **Verification Code** screen, enter your new six-digit verification code, and tap **Log In**.

Log Out of Mobile CRM

There are several ways to log out of the Mobile CRM application.

To log out of the application:

1. Complete one of the following actions:
 - Press the **Home** button of your device.
 - Tap , and tap **Log Out**.
When you do this, Mobile CRM prompts you for your PIN or fingerprint/face ID on your next login, regardless of the timeout period.
 - Tap , tap **Settings**, and tap **Log Out**.
2. If you do not want the application to remember your credentials and favorites, tap **Forget Me on this Device**.

Change User

You can change users in the Mobile CRM application.

The following steps are not applicable if the fingerprint or face ID authentication is enabled.

To change users:

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

Closing Mobile CRM

If you close Mobile 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 that the application communicates with Delttek Vantagepoint.

Reset a Forgotten Password

If you forget your password, you can replace it with a new password on the Login screen.

Prerequisite: This procedure requires that your employee information includes an email address.

To reset a forgotten password:

1. On the Login screen, select the appropriate database.
If there is only one database available for a Touch URL, the **database** field could be hidden. There are also some databases that don't use the forgot password feature. Contact your system administrator for assistance.
2. Tap **Forgot your password?**
3. On the Log In Assistance screen, enter your user ID.
4. Tap **Send**.
 - If the user ID is valid and has an associated email address, an email message that contains a temporary password is sent to that address. Follow the directions in the email message to reset your password the next time that you log in.
 - If the user ID is not valid, you will not receive a temporary password. Tap **Close** to return to the Login screen and then contact your system administrator for assistance.

If your administrator requires that you change your password on your next login, or if your password has already expired, see [Change Your Password](#).

Retrieve a Forgotten User ID

If you forget your user ID, you can retrieve it from the Login screen.

Prerequisite: This procedure requires that your employee information includes an email address.

To retrieve a forgotten user ID:

1. On the Login screen, select the appropriate database.
2. Tap **Forgot your user ID?**
3. On the Log In Assistance screen, enter your email address.
4. Tap **Send**.
 - If the email address that you entered is associated with a valid user ID, an email message with the user ID is sent to that address. If there are multiple employee records in Vantagepoint using the same email address, an email message is not sent and you must contact your database administrator.
 - If the user ID is not valid, you receive an error message. Tap **Close** to return to the Login screen and then contact your system administrator for assistance.

QuickBooks Integration


If the QuickBooks (QB) sync is enabled with Deltak PSA and Mobile CRM, all mapped fields created via QuickBooks become read-only for both firm and contact records in Mobile CRM.

In this case, the buttons for deleting firms and contacts are not available.

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

Note: Only those new contacts added directly in Mobile CRM (but not synced back to QB) are editable.










Screen Display

The Mobile CRM application has different menus, which you can access by tapping .

Contents of the Screen Display

Use menu items to access and manage the different Mobile CRM screens.

Menu Items



Field	Description
Back	Tap  on the upper left-hand side of the screen to go back to the previous screen.
Contacts	Tap  Contacts to search, view, add, edit, or delete contact records. You can also view an activity or add one to a contact record. For more information, refer to Contacts .
Capture Business Card	Tap  Capture Business Card to capture or select a business card image. You can then use the business card details to create a contact. Your administrator enables this feature. To know more about this feature, refer to Capture Business Card .
Firms	Tap  Firms to search, view, add, edit, or delete firm records. You can also view an activity or add one to a firm record. For more information, refer to Firms .
Projects	Tap  Projects to search, view, add, edit, or delete projects. You can also view an activity or add one to a project record. For more information, refer to Projects .
Activities	Tap  Activities to access and manage calendar activities and tasks. Your administrator designates the values in the Type drop-down list, such as meeting, task, and phone call. For more information, refer to Activities .
Settings	Tap  Settings to display the Settings screen , on which you configure Mobile CRM settings according to your business needs and preferences.
Help	Tap  Help to view the user guide for this application. You can also access the help from Settings .
Log Out	Tap  LogOut to log out of the application.

Field	Description
Provide Feedback	Tap this button to open your default email application and send a feedback message. For more information, refer to Rating and Feedback .

Field Indicators

Several indicators mark the fields on the screen when you add/edit records or configure settings.

The field indicators are as follows:

- **Required:** You must enter a value in this field in order to continue a task. Each required field is marked with an asterisk (*).
- **Editable:** You are allowed to enter a value in this field. Each editable field is marked with  when you enter a value. Tap  to clear the field.
- **Read Only:** You cannot enter or change a value in a read-only field..

Links

Links are displayed as underlined blue text.

Each link functions differently depending on the information it contains. Tap a link to activate these functions:

- **Phone Numbers:** Prompts your device to call the number. If your device does not have call capabilities, such as tablets, this link opens a context menu and 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

Mobile CRM displays user-defined fields (UDFs) used in Deltek Vantagepoint on the Misc tab.

Your system administrator determines which UDFs are available in the application. By default, the tab name is Misc but your system administrator can change it.



Contacts

The Details tab on the **Contact** screen enables you to view contact information as well as add, edit, or delete contact records.

Access the Contact Screen

To start checking contact records, you access the Contact screen.

To access the screen:

1. Tap , and then tap **Contacts**.
2. Search for a contact, and tap  in the contact name.

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

The application honors Deltek Vantagepoint role security. Thus, you have the same access (such as read, edit, add, and delete) to contact records in Mobile CRM as you do in Deltek Vantagepoint.

View Contact Records

You can enter the contact name or the firm name of the contact in the **Search** field to view contact records.

To display all available contact records:

1. Tap the **Search** field to display the keyboard and then tap **Search** without using a search entry.
By default, Mobile CRM displays 25 contact records at a time.
2. Scroll to the bottom of the screen and then tap **More** to display the next set of contact records.
All contact records returned by your search display on the screen.
You can change the number of records displayed in **Settings**.

Contact Information

The following table lists the information that displays for each contact on the Details screen.

Contact Info	Description
Email	This field displays the contact's email address.
Business	Tap this field to view the business address of the firm associated with the contact in a map.
Market	This field displays the business classification of the contact.
Source	This field displays text explaining how you learned about this contact, such as client referral or website.

Contact Info	Description
Website	This field displays the website for the contact.
Activities	Tap this field to view all activities linked to the contact.
Projects	Tap this field to view all projects linked to the contact.
Employees	Tap this field to view all employees linked to the contact.

For all phone fields, you can tap the number to call it.

For all email address and home/other address fields, you can tap an address to compose a message or to open the address in a map.

Filter Contact Records

When viewing contact records, use the tabs at the top of the screen to filter contact records.

The contact filters are:

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

Status of a Contact

If CRM Plus and Leads are enabled, the **Status** and **Qualified Status** fields on the **Edit Contact** screen are combined and displayed on the **Contact** screen.


The screen displays one of the following status settings, depending on the contact's two status fields:


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

Add a Contact

You can add a contact from the Contacts screen, from a firm or project record, or from an image.

To add a contact:

1. Tap , tap **Contacts**.

2. On **Contacts**, tap .
3. On **Add Contact**, do either of the following:
 - Tap **Capture business details from business card** and take or select a photo of your contact's business card. The details from the business card populate the fields in the **Add Contact** screen. If there are missing key fields or duplicate contacts, proceed to step 3 of [Add a Contact Using the Capture Business Card](#).
 - Tap and enter necessary information in **First Name**, **Last Name**, and **Email**.

Firm is read-only.


Note: You must provide information in at least two of the **First Name**, **Last Name**, and **Email** fields. This information is used to search for existing contact records, to prevent you from entering a duplicate record.

If the contact name that you enter is similar to an existing contact record, Mobile CRM lists that contact record.

- To edit an existing record, select the contact record from the list.
- To create a new record, tap **Add New Contact**.

The **Qualified Status** option is only available if CRM Plus and Leads are enabled.

You can add lines of text in the **Description** field or you can tap  to expand the field and add more details. This is applicable on both the Details tab and the Misc tab.

4. Tap **Next** .
5. On **Add Contact**, tap the fields to enter or select the appropriate information about the contact.

You can tap the picture icon to add a photo of the contact from your device gallery or by taking a new photo. If the picture icon was locked in the Screen Designer of Deltek Vantagepoint, you cannot add a new photo.
6. Tap **Save**.

The contact record is automatically associated with your employee record.

If you left any required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message.


On the Details tab, you also receive an error message if you delete the only associated required record in the list. At least one required record should be available.



Note: Required fields are defined in Screen Designer, in Deltek Vantagepoint.

Edit Contact Information

You can edit a contact on the Contacts screen or from a firm or project record.

To edit contact information:

1. Tap , and tap **Contacts**.

2. On **Contacts**, search for the contact record to edit.
3. On **Contact**, tap .
4. Edit the necessary fields.
You can enter dates using your keypad or scroll through the date picker and select the appropriate date.
5. To delete the contact photo, tap the picture icon and tap **Delete Existing Photo** on **Edit Photo**.
If the picture icon was locked in the Screen Designer of Deltak Vantagepoint, you cannot delete or replace a photo.
You can directly edit the details in the **Description** field (scroll down the field to view the other details) or you can tap  to expand the field and edit more details. This is applicable on both the Details tab and Misc tab.


Note: Some of the required fields defined in Screen Designer appear **after** you qualify a contact.

6. Tap **Save**.
If you left any required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message.

View a Touchpoint or Activity in a Contact Record

You can view the touchpoints or activities in a contact record.



To view a touchpoint or activity in a contact record:


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

Add a Touchpoint to a Contact Record

You can add touchpoints to a contact record. A touchpoint is a streamlined activity type to which you can quickly add notes about an interaction with a client.

To add a touchpoint to a contact record:

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap the contact record to which you want to add a touchpoint.
3. Tap  and then, under **Create New**, tap **Touchpoint**.




4. On **Add Touchpoint**, the **Start Date** field displays today's date by default; to change the start date, tap the field and either use the date picker to select another date or use your keypad to enter the start date.
5. To enter details for the touchpoint, do either of the following:
 - To enter notes about the touchpoint, such as its purpose or result, tap the **Notes** field. To expand the field, tap .
 - To edit additional fields, such as the activity location or type, tap **Add More Activity Information**.
6. Tap **Save**.

Note: When you tap **Save** and there are required fields that were defined in the Screen Designer of Delttek Vantagepoint, the Add Activity screen displays. Enter the necessary details and then tap **Save**.

Add an Activity to a Contact Record

You can add an activity to a contact record.

To add an activity to a contact record:


1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap the contact record to which you want to add an activity.
3. Tap  and then, under **Create New**, tap **Activity**.
4. On **Add Activity**, tap or enter the necessary details.
Alternatively, on **Details**, you can tap **Activities** and then tap  to add activity details.
The required fields are defined in the Screen Designer of Delttek Vantagepoint.
5. Tap **Save** or **Save and Create a Follow-up**.


Note: Tapping the **Save and Create Follow-up** button saves the changes that you made to the Add Activity 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.

Edit a Touchpoint or Activity in a Contact Record

You can edit details of existing activities, including touchpoints, in a contact record.

To edit an activity in a contact record:

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap the contact record to view.



3. On **Details**, tap **Activities**.
4. On **Activities**, tap the activity that you want to edit and then tap .
5. On **Edit Activity**, tap the fields to edit details.
6. Tap **Save** or **Save and Create a Follow-up**.

Note: Tapping the **Save and Create Follow-up** button saves your changes and then 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.

Delete a Touchpoint or Activity in a Contact Record

You can delete existing activities, including touchpoints, in a contact record.



To delete an activity in a contact record:

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap the contact record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, tap the activity that you want to delete and then tap .
5. On **Edit Activity**, tap **Delete Activity**.
6. Tap **Delete Activity** to confirm the deletion.

Add a Firm to a Contact Record

You can add a firm to a contact record.

To add a firm to a contact record:



1. Tap , tap **Contacts**.
2. On **Contacts**, search for and tap the project record to view.
3. Tap , and under **Create New** tap **Firm**.
4. On **Add Firm**, enter the firm name, and tap **Next**.
If the firm name that you entered is similar to an existing firm record, Mobile CRM lists that firm record.
 - To edit an existing record, select the firm from the list.
 - To create a new record, tap **Add New Firm**.
5. Enter firm details in the **Market**, **Number**, **Relationship**, **Owner**, **Website**, **Type**, and **Status** fields.
6. You can tap **Picture** to add a photo of the firm from your device gallery or by taking a new photo.

7. Enter details for the other required fields.
The **Name** field in **Contacts** already contains the selected contact's name. The required fields are defined in the Screen Designer of Deltek Vantagepoint.
8. Tap **Add Address**.
9. On **Add Firm Address**, enter an address for the firm.
Toggle the **Primary Address** switch to **ON** if you want to set the address as such.
10. Tap **Done**.
11. On **Add Firm**, tap **Save**.
You are redirected to the **Association** screen. When you tap **View Details**, you are redirected to the **Firm Details** screen of the new firm record. You can also add new and associate existing firms in the **Firms** screen.
If you left required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message.

Add a Project to a Contact Record

You can add a project to a contact record.

To add a project to a contact record:

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap the contact record to edit.
3. On **Contact**, tap  and under **Create New** tap **Project**.
4. On **Add Project**, enter or select the appropriate values, and tap **Save**.
The required fields and rows are defined in the Screen Designer of Deltek Vantagepoint.

Note: The selected contact record is also the **Primary Contact**.



5. On **Association**, enter or select the appropriate values and then tap **Save**.

Qualify a Lead

Qualifying a lead automatically changes the qualification status to **Qualified Contact** and the contact's status to **Active**.

Note: This procedure only applies for CRM Plus with lead qualification enabled.

To qualify a lead:

1. Tap , and tap **Contacts**.
2. On **Contacts**, search for and tap the contact that you want to qualify.
3. On **Contact**, tap **Qualify** (for new leads) or  and then tap **Qualify Contact**.

4. On **Qualify Contact**, tap **Qualify a Contact**.
You can also take any of the following actions:
 - Tap **Create New Firm** to add a new firm.
 - Tap **Create New Project** to add a new project.
 - Tap **Marketing Campaign** to associate a marketing campaign.
5. Tap **Done**.



Note: Some of the required fields defined in the Screen Designer of Deltek Vantagepoint only appear after you qualify a contact.

Disqualify a Contact or New Lead

You can also disqualify a contact or new lead if your user role is authorized to do the action.

Note: This only applies to CRM Plus with lead qualification enabled.

To disqualify a contact or new lead:



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

Revert a Contact to a Lead

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

Note: This only applies to CRM Plus with lead qualification enabled.



To revert a contact to a lead:

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

Delete a Contact Record

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

To delete a contact record:

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

Capture Business Card

In Mobile CRM, you can use a business card photo to create a new contact.

This screen allows you to take an image of a business card using your device's camera or select an image from the archive or camera gallery, and then easily associate the details of the business card with a new contact.

The Capture Business Card screen is only available if the **Use Intelligent Character Recognition (ICR) in Mobile CRM** option is selected in CRM Settings in Deltak Vantagepoint. Contact your administrator to enable this feature.

ICR Technology

Mobile CRM uses Intelligent Character Recognition (ICR).

With this feature, the application automatically scans and analyzes the captured or selected business card image, maps the captured data, and populates the matched fields so you can create a new contact and determine whether or not a duplicate contact exists. If a duplicate contact exists, you can view and update the duplicate contact instead of adding a new one.

After you enable the ICR feature:

- You can create a contact from captured data when you use your device's camera, or select an image from the archive or camera gallery through **Capture Business Card**. If the contact already exists, the details of the captured data are verified. If there is no existing duplicate contact, you can create a new contact from the captured data.
- You can also create a contact by tapping **Capture details from business card** on the Add Contact or Edit Contact screens.

When mapping the captured data to the Add Contact and Edit Contact screens, the ICR feature uses the language set on the device instead of the language selected upon login.

Mobile CRM uses the image only to read the data and does not store your data throughout this process.

Enable ICR

To enable ICR, open Deltak Vantagepoint, navigate to **Settings » CRM**, and set the **Use Intelligent Character Recognition (ICR) in Mobile CRM** option to **Yes**.

Add a Contact Using the Capture Business Card

You can create a contact using business card details that you capture in an image.

Prerequisite: The **Use Intelligent Character Recognition (ICR) in Mobile CRM** option must be selected in CRM Settings in Deltak Vantagepoint.

To capture business card details:

1. Tap , tap **Capture Business Card**.

2. Place the business card on the center of the screen and tap the camera button or select a business card image from your photo gallery.

3. Tap **Submit**.

Wait for ICR to process the image and check for existing contacts and missing key fields, like name and email address. You may be prompted to enter missing key fields or review duplicates. If there are missing key fields, such as name or email address, you are prompted to review the captured key fields.

- Update the blank key field with information and then tap **Continue to Add New Contact**.
- Tap **Cancel** or **Recapture Business Card** to capture or select a new business card image.

If there are existing contacts with duplicate information, the **Duplicates** screen displays and you can do one of the following:

- Select the existing contact and edit the contact details if necessary.
- Tap **Recapture Business Card** to capture or select a new business card image.
- Tap **Add new Contact** to add the new, similar contact. You are allowed to continue to create the contact if there are two different people with the same name.

If there are no missing key fields or duplicate contacts, you are redirected to the **Add Contact** screen with information populated from the business card.

4. On **Add Contact**, tap the fields that you need to edit.

- You can tap the picture icon to add a photo of the contact from your device gallery or by taking a new photo. The required fields are defined in the Screen Designer of Deltek Vantagepoint.
- For new lead contacts, the firm's address populates the **Business** field.
- For qualified contacts, if the firm has no address and your user role can add a firm address in the Firms hub of Deltek Vantagepoint, you can add a new address to the firm and associate that address with the contact. It will be the business address and marked as the primary address.
- If your user role is not permitted to add a firm address, there are multiple firm addresses that match the ZIP code or postal code of the business card's address, or there is no firm address that matches the ZIP code or postal code, the **Home/Other** fields are populated instead.

5. Tap **Save**.

The contact record is automatically associated with your employee record.

If you left any required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message.



Firms

The **Firm info** screen allows you to view firm information as well as to add, edit, or delete firm records.

Access the Firm Info Screen

To start checking Firm records, you need to access the Firm Info screen.

To access the screen:

1. Tap .
2. Tap **Firms**, and search for a firm.
3. Tap  in the firm name.

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

View a Firm Record

You can view a firm record.

To view a firm record:

1. Enter the firm name or number in the **Search** field.
2. Tap **Search** on the keyboard.
All firm records that have a name, number, or alias containing your search entry display on the screen.

View All Available Firm Records

You can display and view all the available firm records.

To display all available firm records:

1. Tap the **Search** field to display the keyboard.
2. Tap **Search** without using a search entry.

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

Firm Information

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

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

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

Filter Firm Records

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




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


Add a Firm

You can add a firm in Mobile CRM.

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

To add a firm:

1. Tap , tap **Firms**.
2. On **Firms**, tap .
3. On **Add Firm**, enter the firm name, and tap **Next**.
If the firm name that you enter is similar to an existing firm record, Mobile CRM lists those firm records.
 - To edit an existing record, select the firm record from the list.
 - To create a new record, tap **Add New Firm**.
4. On **Add Firm**, tap  beside the **Market**, **Number**, **Relationship**, **Owner**, **Website**, **Type**, and **Status** fields to edit the firm's information.

Note: You can add lines of text in the **Description** field or you can tap  to expand the field and add more details. This is applicable on both the **Details** tab and the **Misc** tab.

5. Tap the picture icon to add a photo of the firm from your device gallery or by taking a new photo. If the picture icon was locked in the Screen Designer of Delttek Vantagepoint, you cannot add or replace a photo.
6. Enter details for the other required fields.
The required fields are defined in the Screen Designer of Delttek Vantagepoint.
7. Tap **Add Address**.
8. On **Add Firm Address**, enter the address of the firm.
Toggle the **Primary Address** switch to **ON** if you want to set the address as such.
9. Tap **Done**.
10. On **Add Firm**, tap **Save**.

Note: If you left any required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message.

Add a Firm from a Project Record

You can add a firm from a project record.





To add a firm from a project record:

1. On **Details**, tap .
2. Under **Create New**, tap **Firm**.

Edit a Firm Record

You can edit a firm record.

To edit a firm record:

1. Tap , and tap **Firms**.
2. On **Firms**, search for the firm record to edit and tap it.
3. On **Firm**, tap .
4. On **Edit Firm**, modify the necessary information.
Tap  in some fields to edit them. You can enter dates using your keypad or scroll through the date picker and select the appropriate date.
You can edit the details in the **Description** field (scroll down the field to view the other details) or you can tap  to expand the field and edit more details. This is applicable on both the Details tab and Misc tab.


Note: Required fields are defined in Screen Designer, in Deltek Vantagepoint. If the picture icon was locked in Screen Designer, you cannot delete or replace a photo of your firm.

5. Tap **Save**.
If you left any required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message.

View a Touchpoint or Activity in a Firm Record

You can view touchpoints or activities in a firm record.




To view a touchpoint or activity in a firm record:

1. Tap , and tap **Firms**.
2. On **Firms**, search for and tap the firm record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, search for and tap the touchpoint or activity that you want to view.

Add a Touchpoint to a Firm Record

You can add touchpoints to a firm record. A touchpoint is a streamlined activity type to which you can quickly add notes about an interaction with a client.

To add a touchpoint to a firm record:




1. Tap , and tap **Firms**.
2. On **Firms**, search for and tap the firm record to which you want to add a touchpoint.
3. Tap  and then, under **Create New**, tap **Touchpoint**.
4. On **Add Touchpoint**, the **Start Date** field displays today's date by default; to change the start date, tap the field and either use the date picker to select another date or use your keypad to enter the start date.
5. Tap **Contact** to select a contact for the touchpoint.
The Contacts screen only displays contacts that are associated with the firm record.
6. To enter details for the touchpoint, do either of the following:
 - To enter notes about the touchpoint, such as its purpose or result. tap the **Notes** field. To expand the field, tap .
 - To edit additional fields, such as the activity location or type, tap **Add More Activity Information**.
7. Tap **Save**.

Note: When you tap **Save** and there are required fields that were defined in the Screen Designer of Deltek Vantagepoint, the Add Activity screen displays. Enter the necessary details and then tap **Save**.

Add an Activity to a Firm Record

You can add an activity to a firm record.

To add an activity to a firm record:



1. Tap , and then tap **Firms**.
2. On **Firms**, search for and tap the firm record to which you want to add an activity.
3. Tap  and then, under **Create New**, tap **Activity**.
4. On **Add Activity**, tap or enter the necessary details.
Alternatively, on **Details**, you can tap **Activities** and then tap  to add activity details.
The required fields are defined in the Screen Designer of Deltek Vantagepoint.
5. Tap **Save** or **Save and Create a Follow-up**.

Note: Tapping the **Save and Create Follow-up** button saves the changes that you made on the Add Activity 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.

Edit a Touchpoint or Activity in a Firm Record

You can edit details of existing activities, including touchpoints, in a firm record.

To edit an activity in a firm record:



1. Tap , and tap **Firms**.
2. On **Firms**, search for and tap the firm record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, tap the activity that you want to edit and then tap .
5. On **Edit Activity**, tap the fields to edit details.
6. Tap **Save** or **Save and Create a Follow-up**.

Note: Tapping the **Save and Create Follow-up** button saves your changes and then 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.

Delete a Touchpoint or Activity in a Firm Record

You can delete existing activities, including touchpoints, in a firm record.



To delete an activity in a firm record:

1. Tap , and tap **Firms**.
2. On **Firms**, search for and tap the firm record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, tap the activity that you want to delete and then tap .
5. On **Edit Activity**, tap **Delete Activity**.
6. Tap **Delete Activity** to confirm the deletion.

Add a Contact to a Firm Record

You can add a contact to a firm record in multiple ways.

To add a contact to a firm record:

1. Tap , tap **Firms**.
2. On **Firms**, search for and tap the firm record to view.
3. Tap , and tap **Contact** under **Create New**.
4. On **Add Contact**, you can do either of the following:
 - Tap **Capture business details from business card** and take a photo of your contact's business card. The details from the business card will populate the fields in the **Add Contact** screen. If there are missing key fields or duplicate contacts, proceed to step 3 of [Add a Contact Using the Capture Business Card](#).
 - Tap and enter necessary information in **First Name**, **Last Name**, and **Email**


Firm is read-only.

Note: You must provide information in at least two of the **First Name**, **Last Name**, and **Email** fields. This information is used to search for existing contact records, to prevent you from entering a duplicate record.

If the contact name that you enter is similar to an existing contact record, Mobile CRM lists that contact record.

- To edit an existing record, select the contact record from the list.
- To create a new record, tap **Add New Contact**.



The **Qualified Status** option is only available if CRM Plus and Leads are enabled.

5. Tap **Next** .
6. In the **Add Contact** screen, enter the necessary details.
The required fields are defined in the Screen Designer of Deltek Vantagepoint.
7. Tap **Save**.
You are redirected to the **Association** screen. (If you click **Cancel** after saving, you are then redirected to this screen.)
If you associate a contact with an existing firm in the project, the **Type** field is read-only. The associated firm for the new contact is included in the **Firms** list.
8. To see details for the new contact record, tap **View Details** to display the **Details** screen.
You can also add new contacts, and associate existing contacts, in the **Contacts** screen.

Add a Project to a Firm Record

You can also add a project to a firm record.

To add a project to a firm record:

1. Tap , and tap **Firms**.
2. On **Firms**, search for and tap the firm record to edit.
3. On **Firm**, tap  and tap **Project** under **Create New**.
4. On **Add Project**, enter or select the appropriate values and then tap **Save**.
The required fields and rows are defined in the Screen Designer of Deltek Vantagepoint.



Note: The selected firm record is also the entry in the **Name** field of the Firms row.

5. Enter the details for the association with the firm, and tap **Save**.

Delete a Firm Record

You can delete an existing firm record.

To delete a firm record:

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



Projects

The **Details** screen of a project enables you to view contact information as well as add, edit, or delete projects.

Access the Details Screen

To start checking Project records, you need to access the Details screen.

To access the screen:

1. Tap , and Tap **Projects**.
2. Search for a project, and tap  in the project name.

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

View Project Records

You can view a project record.

To view a project:

Enter the project name in the **Search** field, and tap the search icon.

All project records associated with your search entry display on the screen. There are four search types:

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

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

Project Information

Review the information that displays on the Details screen of a project.

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

Mobile CRM does not include address information for projects.

Project Info	Description
Name	This field displays the project title.
Number	This field displays the project number.
Pre-award Number	This field displays the assigned project number at the time that the project was originally created. This is a read-only field and it is not available on the Add Project screen.
Description	This field displays a brief description of the project.
Organization	This field displays the organization in your firm that is responsible for pursuing the project.
Primary Firm	This field displays the name of the primary firm associated with the project. Selecting the primary firm associates the project automatically with the selected firm. Mobile CRM prompts you whether to assign the Owner role to the newly selected firm.
Primary Contact	This field displays the name of the primary contact associated with the project. Selecting the primary contact associates the project automatically with the selected contact. Mobile CRM prompts you whether to assign the Owner role to the newly selected contact.
Principal	This field displays the name of the employee who is the principal-in-charge for the project. Selecting the principal associates the project automatically with the selected employee.
Project Manager	This field displays the name of the employee who is the project manager for the project. Selecting the project manager associates the project automatically with the selected employee.
Area Leader	This field displays the name of the employee who is the area leader for the project. Selecting the supervisor associates the project automatically with the selected employee.
Revenue	This field displays the estimated monetary amount of the expected revenue if the project results in an awarded project.
Probability	This field displays a number that represents the probability that the project will become a project.
Weighted Revenue	This field displays the weighted revenue of the project that results from Revenue and Probability .
Owner Value	This field displays the total amount of the contract for the owner of the project, in the project's currency.
Currency	This field displays the currency for the firm. This field only displays if you are using a multicurrency database and you have rights to the field. The available options must include currencies that are enabled for the firm (and all currencies for all firms, if Multicompany is enabled).

Project Info	Description
Date Opened	This field displays the date on which the project was identified. Tapping this field displays the Date Range screen.
Date Closed	This field displays the date on which the project was closed. Tapping this field displays the Date Range screen.
Days Open	This field displays the number of days the project has been open. Tapping this field displays the Date Range screen.
Stage	This field displays the current stage of the project.
Responsibility	This field displays the level of responsibility that your enterprise has for the project, such as Prime, Joint Venture, or Consultant .
Type	This field displays the type of job associated with the project.
Source	This field displays the source of the project.
Record Status	This field displays the status of the project. Tapping this field displays the Estimate screen.
Estimated Start Date	This field displays the date on which the job associated with the project is expected to begin. Tapping this field displays the Estimate screen.
Estimated Completion	This field displays the date on which the job associated with the project is expected to be completed. Tapping this field displays the Estimate screen.
Location	<p>Tap this field to enter the complete address where the project is located. Location has several fields:</p> <ul style="list-style-type: none"> ▪ Address 1, 2, 3: Enter the address where the project is located. ▪ City: Enter the city where the project is located. ▪ State/Province: Select the state or province where the project is located. If you select an entry in the Country field first, the list is limited to states or provinces in that country. If you do not specify a country, you will be prompted to select a country first, and then you can select a state or province. ▪ Zip/Postcode: Enter the ZIP or postal code for the project's location. ▪ Country: Select the project's country.
County	Tap this field to select the project's county.
Email	Tap this field to enter an email address for the project location. Your entry becomes a link that you can click to open your default email application and send an email to that address.
Phone	Tap this field to enter the phone number for the project location.
Fax	Tap this field to enter the fax number for the project location.
Contacts	Tap this field to view all contacts linked to the project.

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

Filter Projects



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


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

Add a Project

You add projects on the Projects screen.

To add a project:

1. Tap , and tap **Projects**.
2. On **Projects**, tap .
3. On **Add Project**, enter or select the appropriate values and tap **Save**.
 The required fields and rows are defined in the Screen Designer of Deltek Vantagepoint. If the picture icon was locked in Screen Designer, you cannot add or replace a photo of your project.
 If the Team Members grid is required in Deltek Vantagepoint, you must provide at least one entry in either the **Primary Contact**, **Key Pursuit Employee**, **Contact**, or **Employee** fields in Mobile CRM. Your selected **Primary Contact** automatically populates the **Name** field in the Contacts row if it is still blank. However, if there are entries on the **Name** field (Contacts) and **Primary Contact** field, both entries are associated with the project.

Note: You can add lines of text in the **Description** field or you can tap  to expand the field and add more details. This is applicable on both the Details tab and the Misc tab.

Note: If you left any required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message.

Add a Project from a Contact Record

You can also add a project from a contact record.

To add a project from a contact record:

1. On **Details**, tap .
2. Under **Create New**, tap **Project**.

Add a Project from a Firm record

You can also add a project from a firm record.



To add a project from a firm record:

1. On **Firm**, tap .
2. Under **Create New**, tap **Project**.


Edit a Project

You can edit a project record.

To edit a project:

1. Tap , and tap **Projects**.
2. On **Projects**, search for the project to edit and tap it.
3. On **Details**, tap .



If an existing project record has a missing required row entry, the row with the blank required field is displayed.

4. On **Edit Project**, edit the necessary fields, and tap **Save**.
 - You cannot change the primary contact and firm of an existing opportunity record.
 - You can enter dates using your keypad or scroll through the date picker and select the appropriate date.
 - If you left any required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message. This also happens when you change the status of a project from **Pre-qualified** to **Awarded** and leave the required fields blank.
 - You can edit the details in the **Description** and **Won/Lost Notes** fields (scroll down the field to view the other details) or you can tap  to expand these fields and edit more details. This applies on both the Details tab and the Misc tab.
 - The required fields and rows are defined in the Screen Designer of Delttek Vantagepoint. If the picture icon was locked in Screen Designer, you cannot replace a photo of your project.

Delete a Project

You can delete an existing firm record.


To delete a project:

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

View a Touchpoint or Activity in a Project Record

You can view touchpoints or activities in a project record.




To view a touchpoint or activity in a project record:

1. Tap , and tap **Projects**.
2. On **Projects**, search for and tap the project record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, search for and tap the touchpoint or activity that you want to view.

Add a Touchpoint to a Project Record

You can add touchpoints to a project record. A touchpoint is a streamlined activity type to which you can quickly add notes about an interaction with a client.

To add a touchpoint to a project record:

1. Tap , and tap **Projects**.
2. On **Projects**, search for and tap the project record to which you want to add a touchpoint.
3. Tap  and then, under **Create New**, tap **Touchpoint**.
4. On **Add Touchpoint**, the **Start Date** field displays today's date by default; to change the start date, tap the field and either use the date picker to select another date or use your keypad to enter the start date.
5. Tap **Contact** to select a contact for the touchpoint.
The Contacts screen only displays contacts of the primary firm for the project.
6. To enter details for the touchpoint, do either of the following:
 - To enter notes about the touchpoint, such as its purpose or result, tap the **Notes** field. To expand the field, tap .
 - To edit additional fields, such as the activity location or type, tap **Add More Activity Information**.




7. Tap **Save**.

Note: When you tap **Save** and there are required fields that were defined in the Screen Designer of Deltek Vantagepoint, the Add Activity screen displays. Enter the necessary details and then tap **Save**.

Add an Activity to a Project Record

You can add an activity to a project record.

To add an activity to a project record:



1. Tap , and then tap **Projects**.
2. On **Projects**, search for and tap the project record to view.
3. Tap  and then, under **Create New**, tap **Activity**.
4. On **Add Activity**, tap or enter the necessary details.
Alternatively, on **Details**, scroll down, tap **Activities**, and tap . The required fields are defined in the Screen Designer of Deltek Vantagepoint.
5. Tap **Save** or **Save and Create a Follow-up**.

Note: Tapping the **Save and Create Follow-up** button saves the changes that you made to the Add Activity 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.

Edit a Touchpoint or Activity in a Project Record

You can edit details of existing activities, including touchpoints, in a project record.

To edit an activity in a project record:

1. Tap , and tap **Projects**.
2. On **Projects**, search for and tap the project record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, tap the activity that you want to edit and then tap .
5. On **Edit Activity**, tap the fields to edit details.
6. Tap **Save** or **Save and Create a Follow-up**.



Note: Tapping the **Save and Create Follow-up** button saves your changes and then 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.

Delete a Touchpoint or Activity in a Project Record

You can delete existing activities, including touchpoints, in a project record.



To delete an activity in a project record:

1. Tap , and tap **Projects**.
2. On **Projects**, search for and tap the project record to view.
3. On **Details**, tap **Activities**.
4. On **Activities**, tap the activity that you want to delete and then tap .
5. On **Edit Activity**, tap **Delete Activity**.
6. Tap **Delete Activity** to confirm the deletion.

Add a Contact to a Project Record

You can add a contact to a project record in multiple ways.

To add a contact to a project record:

1. Tap , tap **Projects**.
2. On **Projects**, search for and tap the project record to view.
3. Tap , and under **Create New** tap **Contact**.
4. On **Add Contact**, you can do either of the following:
 - Tap **Capture business details from business card** and take a photo of your contact's business card. The details from the business card will populate the fields in the **Add Contact** screen. If there are missing key fields or duplicate contacts, proceed to step 3 of [Add a Contact Using the Capture Business Card](#).
 - Tap and enter necessary information in **First Name**, **Last Name**, and **Email**

Note: You must provide information on at least two of the **First Name**, **Last Name**, **Email**, or **Firm** fields. This information is used to search for existing contact records to prevent you from entering a duplicate record.

If the contact name that you entered is similar to an existing contact record, Mobile CRM lists that contact record.

- To edit an existing record, select the contact record from the list.
- To create a new record, tap **Add New Contact**.



The **Qualified Status** option is only available if CRM Plus and Leads are enabled.

5. Tap **Next** >.
6. In the **Add Contact** screen, enter the necessary details.
The required fields are defined in Screen Designer, in Deltek Vantagepoint.
7. Tap **Save**.
You are redirected to the **Team Members** screen.
If you click **Cancel** after saving, you are redirected to the **Association** screen. If you associate a contact with an existing firm in the project, the **Type** field will be read-only. The associated firm in the new contact will be included in the **Firms** list.
8. To see details for the new contact record, tap **View Details** to display the **Details** screen.
You can also add new contacts, and associate existing contacts, in the **Team Members** screen.

Add a Firm to a Project Record

You can add a firm to a project record.

To add a firm to a project record:

1. Tap , tap **Projects**.
2. On **Projects**, search for and tap the project record to view.
3. Tap , and under **Create New** tap **Firm**.
4. On **Add Firm**, enter the firm name and tap **Next**.

Note: If the firm name that you entered is similar to an existing firm record, Mobile CRM lists that firm record.

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

5. On **Add Firm**, tap > beside the **Market**, **Number**, **Relationship**, **Owner**, **Website**, **Type**, and **Status** fields to edit the firm's information.
6. You can tap **Picture** to add a photo of the firm from your device gallery or by taking a new photo.
7. Enter details for the other required fields.
The **Name** field in **Projects** already contains the selected project's name. The required fields are defined in the Screen Designer of Deltek Vantagepoint.
8. Tap **Add Address**.
9. On **Add Firm Address**, enter an address of the firm.
Toggle the **Primary Address** switch to **ON** if you want to set the address as such.
10. Tap **Done**.
11. On **Add Firm**, tap **Save**.


Note: After you tap save, you are redirected to the **Association** screen. When you tap **View Details**, you are redirected to the **Firm Details** screen of the new firm record. You can also add new and associate existing firms in the **Firms** screen.

Note: If you left required fields blank and then saved, the screen automatically scrolls back to the top and you receive an error message.

View a Milestone

You can view milestones in a project record.

To view a milestone:



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


Add a Milestone

Milestones are either system or non-system. System milestones can only be added to a project once, while a non-system milestone can be added to a project multiple times.

For example, you can only have one **Estimated Start Date** because it is a system milestone.

To add a milestone:

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

Alternatively, you can tap , and under **Create New** tap **Milestone**.



4. On **Add Milestone**, enter the appropriate details and then tap **Save**.
The required fields and rows are defined in the Screen Designer of Deltak Vantagepoint.


Note: You can enter a date directly in the **Date** field and lines of text in the **Notes** field using your device's keypad. In the **Notes** field, tap  to expand the field and add more details.

Edit a Milestone

You can edit milestones in a project record.

To edit a milestone:



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

Note: You can enter a date directly in the **Date** field and lines of text in the **Notes** field using your device's keypad. In the **Notes** field, tap  to expand the field and add more details.

Delete a Milestone

You can edit existing milestones in a project record.

To delete a milestone:

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

Associations



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

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

Associate a Record to a New Record

To associate a record to a new record, you need to access either the **Contacts**, **Firms**, or **Projects** screen.



To associate a record to a new record:

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

Associate a Record to an Existing Record

You can also associate a record to an existing record.

To associate a record to an existing record:

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

- **Employees:** on **Details** screen (from **Projects**).



Note: You can also use the **Search** field to look for an existing record.



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

View Details of an Associated Record

You can view the details of a record from the associated record list.

To view the details of an associated record:




1. Tap , and tap **Contacts, Firms, Projects** or **Activities**.
2. Search for the record that you want to view, and tap it.
3. Tap  beside the associated record list (for example, **Team Members**).
4. Tap a record name in the list to view its details; Association Grids are not available in this type of view.

Note: On the Details screen of the associated record, you can tap  below the screen to edit the record's details on the Edit (Hub) screen.  is not available when you view the details of the associated record through the Association screen.

Edit an Association

You can edit an existing association.

To edit an association:




1. Tap , and tap **Contacts, Firms, Projects** or **Activities**.
2. Search for the record that you want to update, and tap it.
3. Tap  beside the associated record list (for example, **Team Members**).
4. Tap  beside the record name for the association that you want to edit.
5. Update the role or relationship information, and tap **Save**.

Note: On the Association screen, you can tap **View Details** to view the associated record's details

Remove an Association

You can also remove an existing association.

To remove an association:

1. Tap , and tap **Contacts**, **Firms**, or **Projects**.
2. Search for the record with an association that you want to remove and tap it.
3. Tap  beside the associated record list (for example, **Team Members**).
4. Tap  beside the record name for the association that you want to delete.
5. On **Association**, tap **Remove Association**.

Note: If you delete the only associated required record in the list, you receive an error message. At least one required record should be available.

Activities






Mobile CRM allows you to view calendar, task, and other activities.

By default, activities for today and the next seven days display. If you scroll up, Mobile CRM displays activities from the previous week. If you scroll down, it displays activities for the next week.

View Calendar Events or Tasks

To view calendar events or tasks, you need to access the **Activities** screen.

To view calendar events or tasks:

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


Note:

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



Add an Activity

You can add a single-occurrence activity in the mobile application. However, although you can add recurring activities in Vantagepoint, you cannot add recurring activities in the mobile application.

To add an activity:

1. Tap , and tap **Activities**.

You can also add activities from other hub records by opening a contact, firm, or project and selecting **Add Activity** from the menu.

2. On **Activities**, tap .
3. On **Add Activity**, tap or enter necessary details.
 - a) You must specify entries in the **Subject** and **Type** fields.
 - b) Tap in the **Start Time** and **End Time** fields using the keypad or tap the clock icon to use the time picker to find and select the appropriate time.
If you forget to indicate whether the time is a.m. or p.m., Mobile CRM automatically assumes that the time is in the a.m.
 - c) Enter dates using your keypad or use the date picker to scroll through dates and select the appropriate date.
 - d) In the **Notes** field, add lines of text directly or tap  to expand the field and then add details. You can use your device's talk-to-text feature to dictate notes.

Note: If the selected activity type is **Calendar** and if the Connect add-in has been configured in Vantagepoint to allow synchronization of contacts and calendar items, the **Calendar Invitation** field displays.



4. If the **Calendar Invitation** field is available, select one of the following options to specify whether employees, or contacts and employees, automatically receive activity invitations:
 - **Do Not Send Invitations:** With this setting, no invitation is sent upon synchronization (this is the default setting).
 - **Send to Employees Only:** This setting synchronizes the activity to your email application calendar and automatically sends an invitation from your email application to the employees who are associated with the calendar activity. After an activity is synced to your email application, you can change the **Calendar Invitation** setting. However, the attendees would have already been invited. You must remove the attendees if you want to cancel the invitation.
 - **Send to Contacts and Employees:** This setting synchronizes the activity to your email application calendar and automatically sends an invitation from your email application to the contacts and employees who are associated with the calendar activity. After an activity is synced to your email application, you can change the **Calendar Invitation** setting. However, the attendees would have already been invited. You must remove the attendees if you want to cancel the invitation.
5. Tap **Save** or **Save and Create a Follow-up**. Tapping **Save and Create Follow-up** saves the changes that you made to **the activity** and creates a copy of the activity for a follow-up. It copies all fields from the original activity, except for the **Start Date/Time**, **End/Date Time**, **Calendar Invitation**, and user-defined fields (UDFs). The values of these fields default to today and the next half hour, respectively.


Edit an Activity

You can edit any activity for which you are an attendee in Mobile CRM.

You can only edit a single occurrence of a recurring activity in the mobile application. To edit the series of a recurring activity, you must log in to Vantagepoint.

To edit an activity:

1. Tap , and tap **Activities**.
2. On **Activities**, tap the activity that you want to edit, and tap .
3. On **Edit Activity**, tap or enter the necessary details.
 - a) Tap in the **Start Time** and **End Time** fields using the keypad or tap the clock icon to use the time picker to find and select the appropriate time.

If you forget to indicate whether the time is a.m. or p.m., Mobile CRM automatically assumes that the time is in the a.m.
 - b) Enter dates using your keypad or use the date picker to scroll through dates and select the appropriate date.
 - c) In the **Notes** field, edit lines of text directly or tap  to expand the field and then edit details.
 - If the activity that you want to edit is a single occurrence of a recurring activity, you receive a message about the recurrence. After you edit a single occurrence of a recurring activity, the activity no longer has the **Recurrence** field and it is removed from the recurring activity series.
 - If the selected activity type is **Calendar** and if the Connect add-in has been configured in Vantagepoint to allow synchronization of contacts and calendar items, the **Calendar Invitation** field displays and you can edit the invitation setting.
 - d) If the **Calendar Invitation** field is available, select one of the following options to specify whether employees, or contacts and employees, automatically receive activity invitations:
 - **Do Not Send Invitations:** With this setting, no invitation is sent upon synchronization (this is the default setting).
 - **Send to Employees Only:** This setting synchronizes the activity to your email application calendar and automatically sends an invitation from your email application to the employees who are associated with the calendar activity. After an activity is synced to your email application, you can change the **Calendar Invitation** setting. However, the attendees would have already been invited. You must remove the attendees if you want to cancel the invitation.
 - **Send to Contacts and Employees:** This setting synchronizes the activity to your email application calendar and automatically sends an invitation from your email application to the contacts and employees who are associated with the calendar activity. After an activity is synced to your email application, you can change the

Calendar Invitation setting. However, the attendees would have already been invited. You must remove the attendees if you want to cancel the invitation.



4. Tap **Save** or **Save and Create a Follow-up**. Tapping **Save and Create Follow-up** saves the changes that you made to the activity and creates a copy of the activity for a follow-up. It copies all fields from the original activity, except for the **Start Date/Time**, **End/Date Time**, **Calendar Invitation**, and user-defined fields (UDFs). (The default setting for the **Calendar Invitation** field is **Do Not Send Invitations**.)

Delete an Activity

You can only delete a single occurrence of a recurring activity in the mobile application.

You must log in to the Deltek Vantagepoint to delete the series of a recurring activity.

To delete an activity:

1. Tap , and tap **Activity**.
2. On **Activities**, tap the activity you want to edit, and tap .
3. On **Edit Activity**, tap **Delete Activity**.
4. Tap **Delete Activity** to confirm the deletion.

Set a Reminder for an Activity




Activity reminders only work in Deltek Vantagepoint and not in the mobile application.

Tapping **Reminder** on **Edit Activity** displays a warning message informing you about it. Tapping **OK** on the message only allows you to set a reminder for a particular activity, but Mobile CRM does not display the corresponding popup reminder.

Send a Message to Attendees

You can also send messages to attendees.

To send a message to attendees:

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

7. On **New Message**, tap **Send**.

Rating and Feedback

You can now provide a rating or send a feedback message in Mobile CRM.

An in-app review is now included in the Mobile CRM application. The in-app review becomes available after you upgrade to a newer release or major release of the Mobile CRM application. You are only prompted one time to submit a rating for the Mobile CRM app, when you create a new contact or activity record.

Note: The in-app review is not available when you create a new contact or activity through record association.

You can also send feedback at any time using the **Provide feedback** button, which is available on the Mobile CRM menu screen. When you tap **Provide Feedback**, the message that opens in your default email application is automatically populated with the following details:

- **To:** Vantagepoint@deltek.com
- **Subject:** Mobile CRM (version) Feedback



Settings

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

Change Search Result Sorting

You can change the sorting of search results in Mobile CRM

To 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 Your Password

Passwords help ensure system security. You can change your password at any time.

You can also follow the steps below if your current password expired or your administrator requires you to change your password on your next login.


To change your password:

1. Tap , and **Settings**.
Proceed to step 3 if you need to change an expired password or you are required to change your current password upon logging in.
2. Tap **Change Password**.
3. In **Old Password** on the Change Password screen, enter your current password.
If you are using the Multi-Factor Authentication feature, you must enter the verification code before changing your password.
4. In **New Password**, enter your new password.
If your system administrator established password policies, your new password is accepted only if it meets those requirements.
5. In **Confirm Password**, enter your new password again.
6. Tap **Save**.
The next time that you log in, you must use the new password.

Change the PIN

You can always change the PIN code in Mobile CRM.

To change your PIN:



1. Tap , and **Settings**.

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

Modify the Server URL

You can also modify the server URL of Mobile CRM through **Settings**.


To modify the 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 Fingerprint or Face ID Authentication

You can enable or disable the fingerprint or face ID feature in Mobile CRM.

To enable/disable fingerprint or face ID authentication:



1. Tap , and tap **Settings**.
2. Use the **Using Fingerprint/Face ID** slider to enable (**ON**) or disable (**OFF**) the fingerprint or face ID authentication.


Note: If the **Using Fingerprint/Face ID** has been disabled, you are prompted to enter a four-digit PIN code. The **Change PIN** button will also be available.

Configure Mobile CRM Settings


You can configure the Mobile CRM settings for a better user experience.

To configure your Mobile 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 database to which you are logged in, tap **Forget Me on this Device** and then log in again. All options and favorites are lost.
- **Using Fingerprint/Face ID:** Slide to turn on or off the fingerprint or face ID authentication. If you turn off this option, you are prompted to enter a four-digit PIN code and the **Change PIN** button becomes available.
- **Show Pictures:** To display or hide pictures of your contacts, toggle this switch.
- **Help:** Tap to access the Mobile CRM help. You can also **Help** access by tapping , and tapping **Help**.
- **Privacy Policy:** Tap to view the Legal Notices and Privacy Statement information page of Deltek.
- **About:** Tap to view the device and operating system information, which includes the following:
 - Device Type
 - Operating System
 - User Agent Name and Version
 - Application (Native App or Web App) Version
 - Deltek CRM Server Version
 - Web Service Version
 - Deltek Vantagepoint System Version
 - Web App Build Version

You can also send the same information to an email address by tapping **Email Info**. This information may be requested by Deltek Support Services if you have an issue with the application.

- **Change Password:** Tap this button to change your current password. Tapping this button directs you to the **Change Password** screen, where you need to enter your old password before you create a new password. This button is not available if you are logging in using Single Sign-On (SSO) or Windows Authentication.
- **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 before you can create the new PIN. This button is not available if the **Using Fingerprint/Face ID** option is turned on.
- **Log Out:** When you close Mobile 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 this button to delete all of your details, including options and favorites, from the application. You must enter a user ID, password, and database the next time that you log in.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management, and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue.

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