

Deltek Touch CRM for Vision

Compete, win and retain clients with mobile business development

Deltek Touch CRM for Vision

- Easily view, add, edit or delete contact or client info from your mobile device
- Update, enter and view opportunities easily
- Call, email or look up an address with the touch of a finger
- Search “Deltek” in the Apple App Store or Google Play Store to install your copy of Deltek Touch CRM for Vision

To take advantage of opportunities and increase profitability, knowledge needs to be in the hands of the business developers who need it most—when they need it most. Luckily, Deltek Vision CRM customers now have anywhere, anytime access to the critical information they need. With Deltek Touch CRM for Vision, calling, emailing or even getting directions to a client’s office is as easy as a tap of a finger—allowing business developers to better compete, win and retain clients. Ideal for the Vision CRM user who travels or is frequently away from the office, this mobile app is key to stepping up performance and ensuring satisfied clients.

Key Features and Benefits

- Anywhere, anytime access to any contact in your Vision database—perfect for business developers on-the-go. Now, users can easily access this information without being strapped to a PC or having to fastidiously duplicate it in other applications. .
- View, add, edit, or delete your Deltek contacts—keeping client information always up-to-date and usable—from the convenience of a mobile device.
- Need to make a phone call or send an email? On your way to a client’s office and need directions? Touch a phone number, touch an email address or tap an office address to view it in a map. It’s that easy.
- Update, enter or view opportunities right from your mobile device to make sure you are tracking everything to make sure you win the project.
- Install directly from the Apple App Store or Google play store, enabling easy installation and deployment. The only prerequisites are that the organization’s instance of Vision be accessible via the Internet and that Touch Sever is installed on your Vision application server.



Figure 1: Search for clients and contacts easily.

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Anytime, Anywhere Access

It is now easier than ever to access CRM data from Deltek Vision CRM. Anywhere, anytime access via a mobile device allows business developers to look up key contact information with the touch of a finger. With more and more organizations working from their mobile devices in the field, having critical information at your fingertips is key to keeping you connected to prospects and clients.

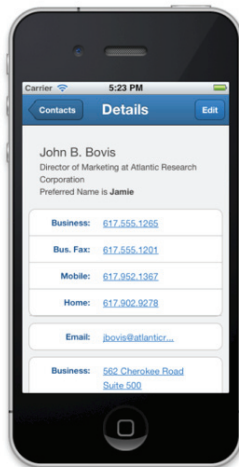


Figure 2: View, add and enter contacts in Touch CRM for Vision

Manage Contacts

Just like in Deltek Vision, with the mobile application you can view, add and edits contacts from anywhere, anytime. Instead of waiting to get back to your office to update—or worse, forgetting or losing the info on the way—Deltek Touch CRM for Vision ensures real-time data accuracy by allowing you to make changes when they're still fresh in your mind.

Make a Call or Submit an Email

Making a call or sending an email can be done with the touch of a finger—literally. Just look up the contact or client and touch either the email address to compose an email, or the phone number to make a call. Being efficient from the convenience of anywhere, anytime is that easy.

Keep Opportunities Up to Date

From anywhere, anytime you can input the latest activities for your opportunities. No more waiting until you get back to the office to input the notes you wrote. Update, view and modify right from your mobile device.

Easy Installation and Deployment

Deltek Touch CRM for Vision utilizes a server-side component that must be installed on your Vision application server. Contact your IT department to ensure this component is in place prior to utilizing this mobile app.

To use Deltek Touch CRM for Vision, a Vision CRM user license is required. For more information, please visit us at deltek.com



For more information on Deltek Touch CRM for Vision, visit deltek.com/vision

Deltek is the leading global provider of enterprise software and information solutions for professional services firms and government contractors. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. 16,000 organizations and 2 million users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resources, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.® deltek.com