

# Deltek Touch CRM for Vision 1.3

## Release Notes

**June 25, 2014**

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## Overview

Welcome to Deltek Touch CRM for Vision 1.3 Release Notes. These release notes contain a summary of the following:

- Major New Features
- Enhancements
- Software Issues Resolved
- Known Issues



The official name of the application is *Deltek Touch CRM for Vision*. This document only uses it at first mention. The succeeding instances of the application name display *Touch CRM*.

In addition, the application name in *Google Play* and *Apple App Store* displays *Touch CRM for Deltek Vision*.

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## Pre-Installation Information

Before you begin the installation of Touch CRM, it is important to understand the information discussed in this section.

### Technical Considerations

The following requirements must be met to run Touch CRM:

- Touch CRM requires that Vision is accessible to your mobile device either over the Internet or via a private network to which your device is connected. For additional information about known issues, see Deltek Knowledge Base [#72783](#).
- Touch CRM supports communication with the Vision server via HTTP or HTTPS. Deltek recommends that you use HTTPS protocol in your production deployment. HTTPS encrypts the data in transit



If you are going to access Touch CRM from the Internet, open a port in your firewall to access the Touch CRM virtual directory, which will be installed on the IIS server.

When Vision is not exposed to the Internet, a VPN can be used to connect the mobile device to the corporate network on which Vision resides to provide the connection needed for Touch CRM. However, while the most common VPN configurations will most likely work without problems, Deltek has not tested all possible VPN types and configurations to ensure compatibility.

- Touch CRM 1.3 works with Vision 7.2 Cumulative Update #014 and Vision 7.3.



To use the full functionality of Touch CRM, you must be on the latest Touch server and Vision.

When installing Touch CRM on a dedicated server, ensure that the Vision Web service URL (for example, <https://server.company.com/vision/visionservices.asmx>) can be accessed from the Touch server. This includes ensuring that the required TCP/IP ports (for example, 443) are open and the Vision server can be resolved via DNS from the Touch server.

You must own Vision core.

- You must install Touch CRM on an IIS server that is installed on Windows 2008, Windows Server 2008 R2, or Windows Server 2012. This can be the same as your Vision server or a separate server.
- When using Secure Sockets Layer (SSL), you must have a certificate issued by a trusted certificate authority. You must not use self-signed certificates. Wild card certificates are acceptable if they come from a trusted certificate authority.
- Touch CRM supports applications from the *Apple App Store* and *Google Play*.



If you are using an unsupported version of Vision (compatibility mode), you may be able to use the device native browser to enter your organization's Touch CRM URL. The default URL can be changed to something else by the administrator. The Touch CRM URL has the format <https://<server>/deltektouch/vision/crm>, where **<server>** refers to the host name of your Touch server.

## Compatibility Mode Definitions

Compatibility Mode	Description
<b>Fully Compatible</b>	You must be on the latest version of each component (Touch CRM application, Touch server, and API). All features and functions in the application are available to you.
<b>Partially Compatible</b>	At least one of the components (Touch server and/or API) is an older version. Some features of the application are hidden and not available to you.
<b>Browser Compatible</b>	At least one of the components (Touch server and/or API) is an older version. The current application does not work with the Touch server or API, but you can still use the application through the mobile browser.
<b>Incompatible</b>	There are some combinations of API and Touch server that make it impossible to even use the browser version to run the application.

## Mobile Device Requirements

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

- Apple iOS 6.1 and higher
- Android 4.x and higher

## For Additional Information

### Customer Care Connect Site

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

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

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes



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

### Access Customer Care Connect

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

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



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

## Available Documentation for this Release

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Customer Care Connect site.

Document Name	Description
Deltek Touch CRM for Vision User Guide	This document contains detailed information and instructions on how to use various features of Touch CRM for Deltek Vision.
Deltek Touch CRM for Vision Installation Guide	This document provides instructions for the installation and configuration of application.

# Major New Features

This section includes summaries of the new features included for the 1.3 release.

## New Buttons

Touch CRM now has buttons with icons (replacing labels) on certain screens.

Button	Description
	Tapping this button displays options specific for the <b>Contacts, Clients,</b> and <b>Opportunities</b> screens. It has replaced  , which now displays a sliding menu when tapped.
	Tapping this button allows you to edit contact, client, and opportunity information.

## Enhancements

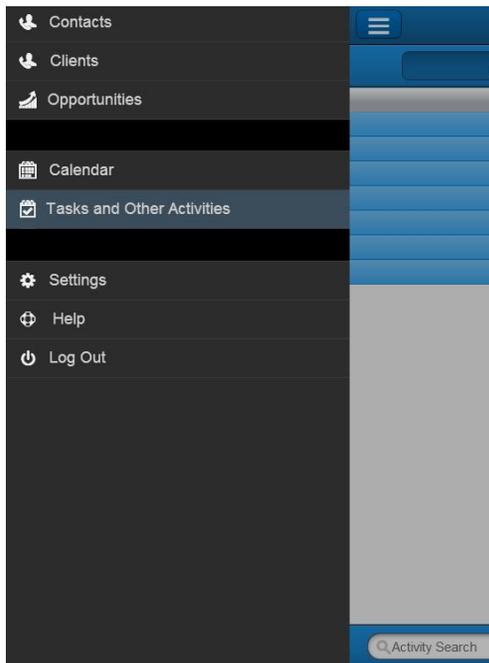
This section includes summaries of the enhancements made to existing features in the 1.3 release.

### User Interface Changes

The user interface of Touch CRM has been updated, replacing tabs and labels (on buttons) with a sliding menu and icons (on buttons), respectively.

#### Sliding Menu

Tapping  displays the sliding menu to the left side of the screen.



You can still access **Help** and **Log Out** on the **Settings** screen. They are only added to the sliding menu for quick access.

#### Updated Buttons and Options

##### Today

The **Today** button (with the label) has been updated with .

##### Quick Menu

A menu button now uses  instead of , which allows you to display the sliding menu.

##### Edit

The **Edit** button (with the label) has been updated with .

## Software Issues Resolved

### Descriptions of Software Issues

You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. For the most part, these issues were addressed before this release through hot fixes, and the additional information was developed to help you decide whether or not you needed to install the hot fixes.

When you install this release, you must install all fixes in the release; you cannot choose to install some and not others. Nevertheless, this additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

### Cannot Select Year Properly on Estimate Screen

**Description:** When you tried to edit estimated start and end dates of an opportunity, Touch CRM would not highlight the corresponding year properly.

**Customers Impacted:** This defect affected Touch CRM users who were accessing the application via Web browser.

**Additional Notes:** None.

### Incorrect Year in Any Date Field on Opportunities

**Description:** If you selected a year in a date field on the **Add Opportunity** and **Edit Opportunity** screens, Touch CRM would not display the correct value after you saved the record. For example, 2099 would become 1999 after saving the record.

**Customers Impacted:** This defect affected Touch CRM users who are using an iOS device.

**Additional Notes:** None.

### Currency Field Defaults to Blank Instead of Functional Currency

**Description:** When you added an opportunity record, the default value of the **Currency** field was blank instead of the functional currency for the company of your associated employee.

**Customers Impacted:** This defect affected all Touch CRM users.

**Additional Notes:** None.

## Known Issues

This section includes summaries of the issues that exist in Touch CRM and will be resolved in the future. You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. The additional information has been included in case you simply want more background information about the defect repairs.



This section does not contain a complete list of outstanding issues. Delttek only includes the high priority issue in Touch CRM for this release. Please contact Delttek Customer Care if these known issues present a significant impact on your business.

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### Scrolling Not Working Properly When You Edit a Field

*This has been added in 1.2.*

**Description:** When you edit a field after you saved a record and then scroll up or down, the view is sometimes limited to the bottom part of the interface.

**Customers Impacted:** This defect affects Touch CRM users who are using devices running on Android.

**Workaround Before Fix:** None.

**Additional Notes:** None.

### Associating a Contact from Clients Should not Start a Workflow for Contacts

*This has been added in 1.3.*

**Description:** When the **Change** workflow is enabled for Contacts, associating an existing Contact from Clients starts the workflow for Contacts when it should not.

**Customers Impacted:** This defect affects Touch CRM users.

**Workaround Before Fix:** None.

**Additional Notes:** None

### Invalid Date Format Error When Editing an Opportunity Record

*This has been added in 1.3.*

**Description:** After getting an error on an Opportunity record and attempting to edit it again, you could encounter an error about an invalid date format.

**Customers Impacted:** This defect affects Touch CRM users.

**Workaround Before Fix:** Tap **Back** to return to the Opportunity Search and select the record again.

**Additional Notes:** None.



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