

Deltek Vantagepoint® 2.0

Getting Started

February 18, 2019

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Getting Started with Vantagepoint

When you first implement Vantagepoint, a set of simple Activation and Setup pages walk you through your initial setup decisions.

If you are the Vantagepoint administrator for your enterprise, you are responsible for initial Activation and Setup tasks. When you complete the process, your enterprise can begin using Vantagepoint for daily activities.

Follow these general steps:

1. Log in to Vantagepoint. The Activation menu displays at the left side of the Startup page.
2. Complete each Activation step in the same order as the menu. No other users can log in to Vantagepoint until Activation is completed.
3. Log out after you complete the final step, Activate Organizations.
4. Log back in using the Setup username. The Setup menu displays at the left side of the page.
5. Complete each Setup step in the same order as the menu.
6. Let other users log in and begin their activities.

To take advantage of advanced features and to tailor Vantagepoint to the specific needs of your enterprise, you will most likely choose to perform additional setup and integration steps, outside of Activation and Setup. You will perform these steps in the Settings area and in other areas of the Vantagepoint software.

Cloud Administration Help

If you are the Vantagepoint administrator for your company, you can use the cloud administration help system to learn more about your role and responsibilities.

Video Library

Vantagepoint comes with a library of short videos focused on getting you up and running quickly. Each video is about five minutes long and focuses on a specific task or area. New videos are added regularly.

To view the videos:

- Click the links below, or
- Click **Help » Videos** from the toolbar in the user interface.

For All Vantagepoint Users

Title	Description
Navigation Tips	This video includes tips to help you successfully navigate, including how to add a record, use list view, select columns, use filters, and perform a simple search. The video also discusses hierarchies.
Time for End Users	Use this video to learn how to complete and submit a timesheet using your computer or mobile device.

Title	Description
Hey Deltek	This video introduces Vantagepoint's Natural Language Interaction feature, also known as Hey Deltek. The video describes what it is, how to set it up, and how to use it.
Simple Searches	This video demonstrates how to perform basic searches in Vantagepoint.
List Reports	This video demonstrates how to create simple reports in Vantagepoint.

For Business Development and Marketing Users

Title	Description
Get Started with CRM for Administrators	Use this video to learn how to navigate through the hubs and set up labels and lists. The video also introduces the import process, which automates the data entry process.
Use Hubs for CRM	Use this video to learn about the hubs used by CRM users, and how to enter data into hubs manually, import data from outside sources, and quickly find or add a record.
Import Data for CRM	Use this video to learn how to separate CRM contacts from personal contacts, locate duplicates and remove them, and import contacts from outside sources.
Lead Qualification	Use this video to learn how to search for, create, qualify, and disqualify leads.
Outlook Integration	Use this video to learn how to use the Outlook add-in to integrate Vantagepoint and Microsoft Outlook.
Integration with Salesforce	Use this video to learn how to use the Salesforce Integration module to integrate Salesforce and Vantagepoint. Learn how to use existing Salesforce information to create projects in Vantagepoint, how to access and report on sales data in one place, and how to use Salesforce information to create estimates.

For Project and Resource Managers

Title	Description
Work Breakdown Structure Basics	Use this video to learn how to set up a work breakdown structure that reflects the project numbering system that you currently use.
Set Up Project Control	Use this video to learn how to set up projects, coordinate project activities, monitor project progress, process labor and expense transactions, charge direct and overhead costs to projects, track employee time, generate project reports, and maintain project budgets.
Set Up Resource Planning	Use this video to learn how to set up the resource planning module, including selecting options for entering and viewing project and resource plans.
Resource Management	Use this video to learn about using Resource Management to add and maintain resource assignments, construct in pursuit project plans, and review plans or resource assignments using a report format. This video

Title	Description
	explores the resource and project views as well as reporting, and provides an overview of the in pursuit project plan structure.
Set Up Billing	Use this video to learn how to set up billing, including selecting options for preparing and formatting client invoices and tracking revenue and taxes.

For Accounting Users

Title	Description
Set Up Time	Use this video to learn how to set up time tracking so that employees can enter, submit, and approve timesheets.
Set Up Expense	Use this video to learn how to set up expense report tracking so that employees can enter, submit, and approve expense reports.
Groups and Categories	Use this video to learn about time and expense groups and categories.
Set Up Billing	Use this video to learn how to set up billing, including selecting options for preparing and formatting client invoices and tracking revenue and taxes.
Chart of Accounts	Vantagepoint includes a standard chart of accounts, which you can modify to suit the needs of your organization. This video shows how to review and modify these accounts.
Cash Management	This video demonstrates how to specify the ways in which your organization manages cash and provides account information.

For Proposal Coordinators

Title	Description
Introduction to Proposals	The Proposal application provides flexibility and a variety of elements and options that allow users to create a custom proposal for their clients, organization, project, and team. This video provides an overview of the proposal application.
Including Hub Information in Proposals	This video demonstrates how to add records from hubs in to Proposals, insert images and additional fields, and format fields and text.
Creating a Resume Template	This video demonstrates how to create a resume template. Resumes templates are helpful when submitting proposals for projects in which users want to highlight their team's background and experience. A resume template saves time by allowing users to create the layout and determine the information they want to present about their team to clients.
Proposal Document and Page Properties	This video demonstrates how to set up document and page properties in a proposal in Vantagepoint.
Proposal Templates	This video demonstrates how to create a template from a proposal.

Title	Description
Master Elements	This video introduces master elements used in Vantagepoint proposals. Master elements are groups of elements that can be reused over and over in proposals.

For Administrators

Title	Description
Implementation Overview	This video introduces the implementation process and discusses the steps you'll take to get Vantagepoint up and running quickly.
Activation Overview	Use this video to prepare for the activation process and learn about the information that you should gather before you begin.
Work Breakdown Structure Basics	Use this video to learn how to set up a work breakdown structure that reflects the project numbering system that you currently use.
Activate Organizations	Use this video to learn how to set up an organization structure that reflects how your enterprise is structured and to specify whether or not you need to track multiple companies.
Activate Multiple Currencies	Use this video to learn how to set up monetary currencies and to enter exchange rates for them.
Setup Overview	Use this video to prepare for the setup process and learn about the information that you should gather before you begin.
Set Up Hubs	Use this video to learn what hubs are, how to enter data into hubs manually, and how to quickly find or add a record. The video also introduces the import process, which automates the data entry process.
Get Started with CRM for Administrators	Use this video to learn how to navigate through the hubs and set up labels and lists. The video also introduces the import process, which automates the data entry process.
Import Data	Use this video to learn how to separate CRM contacts from personal contacts, locate duplicates and remove them, and import contacts from outside sources.
Set Up Labels and Lists	Use this video to learn how to set up a new custom label, edit an existing label, and edit lists and their drop-down values.
Set Up Project Control	Use this video to learn how to set up projects, coordinate project activities, monitor project progress, process labor and expense transactions, charge direct and overhead costs to projects, track employee time, generate project reports, and maintain project budgets.
Set Up Time	Use this video to learn how to set up time tracking so that employees can enter, submit, and approve timesheets.
Set Up Expense	Use this video to learn how to set up expense report tracking so that employees can enter, submit, and approve expense reports.
Groups and Categories	Use this video to learn about time and expense groups and categories.

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Set Up Billing	Use this video to learn how to set up billing, including selecting options for preparing and formatting client invoices and tracking revenue and taxes.
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Integration with Salesforce	Use this video to learn how to use the Salesforce Integration module to integrate Salesforce and Vantagepoint. Learn how to use existing Salesforce information to create projects in Vantagepoint, how to access and report on sales data in one place, and how to use Salesforce information to create estimates.
Outlook Integration	Use this video to learn how to use the Outlook add-in to integrate Vantagepoint and Microsoft Outlook.

Initial Log In

The first time that you use Vantagepoint, you must enter a valid user ID and password. Your welcome email message includes a link to the login page.

To log in:

1. Use your Vantagepoint URL to display the login page.
2. In the **User ID** field, enter **SETUP**.
3. In the **Password** field, enter the password included in your welcome email message.
4. Click **Log In**.
The Vantagepoint Getting Started page displays the Activation menu.

Activation

During activation, you make important decisions about how to configure your database.

Activation is a one-time process, and the settings that you make are permanent. Complete each step in the order shown on the Activation menu on the Getting Started page.

Activate Modules, Accounting Periods, and Fiscal Years

Use the Activate Modules page to verify the Vantagepoint applications that you plan to use and to set up your starting accounting period and fiscal year.

To activate modules:

1. Click **Activate Modules**.
2. On the Modules tab of the Activate Modules form, review the list of modules to confirm that it includes all the modules that your enterprise is licensed to use. If any applications are missing, contact Deltek Operations for help.

3. If you are licensed to use the PSA module and you are integrating Vantagepoint with QuickBooks, select **Yes** for the **Will your PSA instance integrate with QuickBooks Online** setting below the modules list.
4. If you are licensed to use the Accounting module or PSA module, click the Fiscal Period tab.
5. On the Fiscal Period tab:
 - If you are licensed to use the Accounting module, enter your starting accounting period and fiscal year.

This is the first accounting period and fiscal year in which you will enter history or process data in Vantagepoint.

Assume, for example, that you are setting up Vantagepoint in April 2018, and your fiscal year runs from January to December. You may choose to enter historical data for January through March of 2018, so that you can track data and produce reports for the entire fiscal year. In this case, you would enter January 2018 as your first accounting period and 2018 as your first fiscal year. Alternatively, you may decide to enter history for the entire prior year, in which case you would enter January as your first accounting period and 2017 as your first fiscal year.

After you begin using Vantagepoint, you will maintain a calendar of accounting periods, opening and closing periods as the year progresses. To learn more about this process, see the [Accounting Periods and Processing Cycles](#) help topic.
 - If you are licensed to use the PSA module and you are integrating Vantagepoint with QuickBooks, enter the fiscal year and accounting period in which you will start tracking new project labor and expenses.

You must enter the first and last days of a calendar month for the fiscal year start and end dates and the accounting period start and end dates.
6. Click **Save** and then click **Done Activating Modules**.

Activate Defaults

Use the Activate Defaults page to specify the industry and country in which your enterprise operates and define your coding system for projects.

During the Activation process, you can identify up to three levels of project numbering, although many firms use only one (for example, project only) or two (for example, project and phase). For example, you might identify each of your projects using a seven-character code such as 45622.01, in which the first five characters are the main project and the final two represent additional work. The two parts are separated by a period, called a delimiter.

If you already have a project numbering structure, you should probably continue using it. If you are considering a change, consult with your project management and finance teams to be sure that any changes that you make address their needs.

The project number is just one element of the work breakdown structure (WBS) that your enterprise could use. To learn more about the overall work breakdown structure, see the [Work Breakdown Structure Overview](#) help topic.

If the Resource Planning module is activated but the Accounting module is not activated, you do not define project numbering levels as part of the Activation process. Vantagepoint creates your project structure as you import projects from the application in which you maintain them.

To activate your defaults:

1. On the Activation menu, click **Activate Defaults**.
2. From the **Industry** drop-down list, select the one that best matches the work that your enterprise performs and select your country from the **Country** drop-down list.
Based on the industry that you specify, some settings and terminology in Vantagepoint automatically change to reflect common industry practices. For example, if you choose Architecture and Engineering Services, Vantagepoint uses a chart of accounts that is common to the A/E industry and uses terms such as "project," "project manager," and "client" throughout the user interface.

These settings and terminology are just a starting point. After you complete the Activation process, you can review these default settings and terms and further tailor Vantagepoint to your needs. For example, you can use the Labels and Lists page in Setup to change the names of specific fields or change the options that are available in drop-down lists. Or you can use the Time page in Setup to modify the default settings for employee timesheets.

3. Click **Use Industry Defaults**.
In most cases, the WBS tab displays. This is where you specify the structure of your project numbers.

If the Resource Planning module is activated but the Accounting module is not activated, the WBS tab does not display. Go to step 6.
4. Click **WBS Structure**.
5. Set up the work breakdown structure for the way that your enterprise manages projects.
If you are using QuickBooks integration with Vantagepoint, you can set up work breakdown levels in Vantagepoint, but any project data from Vantagepoint that is passed to QuickBooks is passed at the work breakdown level 1 (project) only and not lower levels.
6. Click **Done Activating Defaults**.

Activate Email

Use the Activate Email page to enter email addresses that Vantagepoint will use to send automated messages.

You can have Vantagepoint send emails to employees and others for administrative and approval processes, including to remind an employee of a task to complete or send someone a report to review.

You may also want to route all of your employees' questions about Vantagepoint to a single email address, monitored by your system administrator or another internal product expert.

To activate your email addresses:

1. On the Activation menu, click **Activate Email**.
2. In the **Default Sender Email** field, enter the email address that will display as the "sender" of these automated email messages.
3. Check the **Add DeltekAdmin_ prefix to the Default Sender Email Address** option to add an extra layer of security to the emails that Vantagepoint sends automatically.
Selecting this option adds the prefix DeltekAdmin_ to the sender's email address, which makes it an email address that cannot receive replies. This practice also prevents spoofing, because only valid emails can come from this appended email address.

4. Enter the help email address in the **Default Help Desk Email** field.
This address is used to send automated messages to the Vantagepoint Help Desk.
5. Click **Done Activating Email**.

Activate Currencies

Use the Activate Currencies page to identify the monetary currencies that your enterprise uses and to set up exchange rates between currencies.

Vantagepoint lets your enterprise track its financial transactions and project performance using multiple global currencies. To learn more about how this works, read the [Multiple Currencies](#) section under Concepts.

If you enable the multiple currencies feature, your database automatically changes so that it can track multiple currencies and exchange rates. Additional fields display in the user interface to prompt you to enter currency-related information. After these database changes are made, you cannot reverse them. However, you can choose to not enable the multiple currency feature now, but enable it later, after you complete the Activation and Setup process.

To set up one or more currencies:

1. On the Activation menu, click **Activate Currencies**.
2. Select **Yes** or **No** for the question **Do you need to track more than one currency**.
If you are using QuickBooks integration, you can use only one currency, so this question does not display.
3. Use the remaining fields on the Currency tab to enter information about your main currency, including the number of decimals to use and its name.
The main (or functional) currency is the currency of the primary economic environment in which your enterprise operates. For example, an enterprise located in France normally uses the Euro as its main currency. For more information about the different currency types used in Vantagepoint, see the [Currency Types](#) help topic.
4. Complete one of the following steps:
 - If you use only one currency, click **Done Activating Currencies** to complete and exit the currencies activation. You do not need to complete steps 5-10.
 - If you use multiple currencies, click **Enable Multicurrency**, confirm your choice, and continue with steps 5-10.
5. Click the Multicurrency tab and click + **Add Currency**.
6. Enter each currency that you use and click **Save**.
7. Click the Exchange Rates tab and click + **Add Exchange Rate**.
8. Select a pair of currencies, enter an effective date, and enter an exchange rate.
You do not need to enter information for one pair of currencies (for example, US Dollars to Yen) and also enter information for its inverse (Yen to US Dollars). In fact, doing so can cause incorrect results. Instead, enter information for one exchange (for example, US Dollars to Yen) and let Vantagepoint automatically calculate the inverse (Yen to US Dollars). For more information about how exchange rates work in Vantagepoint, see the [Exchange Rates Overview](#) section.

Repeat this process for multiple currency pairs. You can also switch back and forth between these tabs, entering currencies and setting up exchange rates.

9. Click **Save**.
10. Click **Done Activating Currencies**.

Activate Organizations

Use the Activate Organizations page to provide information about the structure of your enterprise, including your companies and your "organizations" or business units.


To set up the structure for your organizations:

1. On the Activation menu, click **Activate Organizations**.
2. If you are licensed to use the PSA module and you are activating Vantagepoint with QuickBooks integration, enter the name of your company on this page and continue with step 11 below. Otherwise, continue with step 3.
3. In response to the question **Do you have multiple companies?**, select **Yes** or **No**.
If you select **Yes**, you set up your main company now, and then set up additional companies after the Activation and Setup process is complete.
4. If your enterprise is made up of separate organizations, select **Yes** for **Do you have Profit Centers or Business Units that require their own income statements**; otherwise, answer **No**.
Vantagepoint provides the framework for tracking multiple "organizations" in your company. These separate organizations are business units that incur expenses and/or generate revenue. For example, if your company is divided into regions and offices, you might create a separate organization for each region and office and maintain information for each of these segments of your business. To learn more about how this works, see the [Organization Reporting Overview](#) help section.
5. Enter the name of your main company.
6. Select the number of levels required by the structure of your organizations.
Depending on the size and complexity of your enterprise, you can create a fairly simple structure or a more complex one. To learn more about organization levels, see the [Organization Reporting Structure](#) help topic.

If you have multiple companies, your companies are automatically considered to be the first level. So, if you have multiple companies and also want to track branch offices and disciplines, you need a three-level organization structure.
7. Enter the singular and plural names for the levels in your organization.
8. Click **Activate** to update the database to reflect your organization structure.
The Level Values and Combinations tabs display. Use these tabs together to identify the specific business entities that you want to track.
9. Click **Level Values** and enter all of the valid values for the organization that you want to define.
For example, if you have two levels, Office and Studio, list all of your offices and all of your studios. Assign a two-character code to each of the values (for example, BA for Buenos Aires or BR for Branding).
10. Click **Combinations** and identify valid combinations of these values.
For example, if you have two levels, Offices and Studios, identify valid combinations, such as Paris/Branding, Paris/Consumer and New York/Tech. If your Paris office does not have a Tech studio, do not enter that combination.
11. If you want to review or change any of your prior activation settings, do so now, before you activate organizations, which is the last step in the activation process.

After you click **Done Activating Organizations**, you cannot change any of the activation settings that you selected.

12. When you are satisfied that your activation entries are complete, click **Done Activating Organizations**.

13. Click  and then click **Log Out**.

Activation is now complete. Continue with the setup process to enter information about your projects, employees, and finances.

Setup

During the Setup process, you define policies and processes for common Vantagepoint functions. Use Setup to get up and running quickly. Setup areas are located in both the Vantagepoint browser and the desktop applications.

Depending on the modules that you use, you may need set up modules in both applications. You set up most modules in the browser, but you set up Accounting and Purchasing & Inventory in the desktop.

Set Up Project Control

Use the Project Control Setup forms to enter information about how your enterprise tracks labor and overhead and applies these costs to projects.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Time Analysis	Use this form to set up the Time Analysis report, which lets you review how your employees are using their time. You can view employee time from several perspectives, using comparisons of direct time, indirect time, and total time worked. An analysis of indirect time helps you monitor paid time off and control non-billable time. See the Time Analysis help topic for more information.
Options	Use this form to indicate if you want to enter project fee information at all work breakdown structure (WBS) levels or only at the lowest WBS levels.
Labor Posting	Use this form to set up direct and indirect labor accounts associated with specific labor types, such as Employee, Management, and Principal. When an employee charges time to a regular or indirect project, the labor cost is charged automatically to the appropriate account. Use the Override Labor Accounts section to set up exceptions to these rules. See the Labor Types Settings Overview help topic for more information.

Form	Description
Absence Accruals	<p>Use this form to identify the absence accruals (vacation, sick leave, and so on) that your enterprise tracks for its employees. For each absence accrual, you specify if you want to show the accrual balance on employee timesheets and if you want to set up an absence request approval process and, if so, the employee who is the approval administrator. You also set up a project or range of projects for each accrual.</p> <p>See the Accruals Processing Overview help topic for more information.</p>
Overhead Allocation	<p>Use this form to define how the costs accumulated in overhead projects (such as vacation pay, sick time, rent, utilities, office supplies, and administration) will be distributed to regular, revenue-producing projects.</p> <p>See the Overhead Allocation help topic for more information.</p>

Set Up Time

Use the Time Setup forms to make decisions about how employee time will be tracked and how timesheets will be formatted.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how employee timesheets will work, including the increments in which time can be tracked, whether employees can enter overtime hours, and whether an employee signature is required. See the Timesheet Overview help topic for more information.
Time Periods	Use this form to set up timesheet periods. Employees must enter a timesheet for each timesheet period.
Non-Work Days	Use this form to identify the days of the week and the holidays on which employees are not expected to work.
Time Groups	<p>Use this form to set up time groups to distribute timesheet administration responsibilities among different administrators. For example, you can use time groups to bring together employees who share the same job function, work in the same department, or work in the same office.</p> <p>After you set up a time group, you can assign employees to it.</p>
Time Approvals	Use this form to determine if you will use an approval workflow to have leaders approve employee timesheets. You can choose among several workflow options. See the Approvals Center help area for more information about approval workflows.

Form	Description
Time Categories	Use this form to specify that certain common time categories, such as vacation and administration, should display automatically on timesheets, to save employees time. You can have a time category display on timesheets for all employees or for only those who belong to specific time groups.

Set Up Expense

Use the Expense Setup forms to make decisions about how employee expense reports will be tracked.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how employee expense reports will work, including whether employees can enter advances on their expense reports and whether an employee signature is required. See the Expense Reports help topic for more information.
Groups	Use this form to set up expense groups to distribute expense report administration responsibilities among different administrators. For example, you can use expense groups to bring together employees who share the same job function, work in the same department, or work in the same office. After you set up an expense group, you can assign employees to it.
Categories	Use this form to specify that certain common expense categories, such as hotels, meals, and airfare, should display automatically on expense reports, along with the correct accounting and billing information. You can have an expense category display on expense reports for all employees or for only those who belong to specific expense groups. See the Expense Categories help topic for more information.
Payments	Use this form to determine the format of employee expense checks and remittance advices, as well as the bank account that they will be drawn upon unless a different bank is chosen.
Approvals	Use this form to determine if you will use an approval workflow to have leaders approve employee expense reports. You can choose among several different workflow options. See the Approvals Center help area for more information about approval workflows.

Set Up Billing

Use the Billing Setup forms to make decisions about how your clients will be billed.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Options	Use this form to make basic decisions about how clients will be billed, including invoice numbering, whether retainers and retainage are tracked, and whether you use an approval process for invoices. See the Retainers, Retainage Overview , and Invoice Approval Overview help topics for more information.
Fee	Choose whether or not to use scheduled billing. Scheduled billing allows you to invoice fee-based projects based on scheduled invoice dates and percent complete or dollar amounts. See the Scheduled Billing topic for more information.
Invoice Format	On this form, select whether or not to show your company name, byline, and address on billing invoices.
Invoice Accounts	During final invoice processing, invoice transactions are charged to general ledger revenue accounts. Use this form to specify the default revenue account for each section of your invoice. For example, specify the revenue account associated with fee billings. Also use this tab to enter the label that will appear above each invoice section.
Taxes	Use this form to set up the taxes that you need to calculate and include on invoices. For each tax, specify the tax rate, the invoice sections to which it should be applied (labor, expense, fees, and so on), and the general ledger account to which the tax is charged.

Set Up Resource Planning

Use the Resource Planning Setup forms to make decisions about how you will use the Resource Planning application.

Each of the setup forms focuses on a different area.

Form	Description
Summary	This form shows you all of the work that you have done on the other forms.
Plan Settings	Use this form to make basic decisions about how you will use Resource Planning, including whether you will plan consultant and non-consultant expenses, and what overhead rate you will apply to planned projects. Select Yes for the Enable Expense Planning option if you want to be able to enter plan data for expenses. You can enter plan data for direct, indirect, and reimbursable expenses. Select Yes for the Enable Consultant Planning option if you want to be able to enter plan data for consultants. You can enter plan data for direct and reimbursable consultants.

Form	Description
	<p>In the Starting Day of the Week field, select the first day in your work week.</p> <p>Enter the default target labor cost multiplier. The target multiplier represents how much revenue is anticipated for each labor cost dollar spent on a project. It is commonly used as the basis for evaluating the EAC labor cost multipliers as projects move forward.</p> <p>In the Overhead % field, enter the default overhead percentage for plans, as a whole number. For example, enter 10 for 10 percent. A user with the necessary security rights will still be able to enter different percentages for individual projects.</p> <p>If the Resource Planning module is activated but the Accounting module is not activated, select the character (a period, for example) that you want to use as the delimiter between WBS levels in project numbers.</p>
Rates	<p>Use this form to specify whether planned amounts should be based on cost rates, billing rates, or both. Later, you will need to provide additional information about cost and labor rate methods, tables, and multipliers.</p>
Resource Settings	<p>Use this form to specify:</p> <ul style="list-style-type: none"> <p>▪ Utilization Thresholds: These are the low and high utilization percentages within which an employee is considered fully utilized.</p> <p>Example: You set the lowest percentage to 95 and the highest percentage to 105. If an employee's target utilization is 80 percent, that employee is considered properly utilized for a given period if their utilization is between 76 percent (.95 x 80) and 84 percent (1.05 x 80). She is underutilized if her utilization is below 76 percent and overutilized if it is above 84 percent.</p> <p>▪ Scheduled Thresholds: These are the low and high scheduled percentages within which an employee is considered fully scheduled.</p> <p>Example: You set the lowest percentage to 95 and the highest percentage to 105. If an employee's available hours for a week is 40, that employee is considered properly scheduled if they are scheduled for between 38 hours (.95 x 40) and 42 hours (1.05 x 40). He is underscheduled if his scheduled hours are less than 38 and overscheduled if they are more than 42.</p> <p>▪ Soft and Hard Booking: This is an option to tentatively plan, or "soft book" assignments, then "hard book" them when they are confirmed.</p>

Form	Description
	The soft and hard book feature enables you to distinguish between tentative or placeholder resource assignments and those confirmed or approved assignments that you consider a permanent part of the plan. When you generate planning reports, you can filter those reports to include or exclude assignments based on booking status if you include the Booking column on the report.
Labor Categories	Use this form to define a master list of labor categories and related standard billing rates. Labor categories are standard staff roles on projects (for example, Principal, Project Manager, or Supervisor). In the Employees hub, you can associate each employee with a default labor category. You can use labor category rates to invoice new projects. If you use the Resource Planning module, you can use these rates to set up plans for new projects. (If Vantagepoint is set up to use both multiple companies and multiple currencies, this form is not available.)
Non-Work Days	Use this form to identify the days of the week and the holidays on which employees are not expected to work. When Vantagepoint spreads planned hours for you in Resource Planning, non-work days and holidays are allocated no hours, but planners can still assign planned hours to them.

Set Up CRM

The CRM Setup page guides you through the multiple-step process of setting up your CRM processes, data, and user access.

This page walks you through the four main CRM setup steps and suggests videos and other learning resources for each of the steps.

You will perform the CRM setup steps throughout Vantagepoint, not just on this page.

Step	Description
Make a plan	<p>Before you do anything, gather key stakeholders to discuss your goals for using Vantagepoint CRM and how you will achieve those goals. Discuss the data that you will bring into Vantagepoint from others sources, the terminology that you will use, and the workflows that you will establish.</p> <p>See the CRM Overview help topic for more information.</p>
Set up your processes	<p>Set up the framework for your CRM system, including establishing workflows, establishing terminology, and choosing the values that are available from drop-down lists. If you plan to integrate Vantagepoint CRM with Salesforce, set up the integration process.</p> <p>See the Workflow Configuration Overview help topic for more information.</p>

Step	Description
Set up your hubs	<p>The "hubs" area of Vantagepoint is the place where you store key data about your projects, employees, and more. As part of setting up CRM, you enter data about the firms (vendors and clients) with which you work, your contacts, projects you are pursuing, and your marketing efforts. You will probably import this data into Vantagepoint from information sources that you already maintain.</p> <p>See the Hub Records help topic for more information.</p>
Empower your users	<p>Identify the employees who will use Vantagepoint CRM and give them appropriate security access to the CRM applications. See the Security Configuration Overview for more information.</p>

Set Up Labels and Lists

Use the Labels and Lists Setup form to set up the terminology used in the CRM application and the values that will be available from drop-down lists.

Each of the setup forms focuses on a different area.

Form	Description
Summary	<p>This form shows you all of the work that you have done on the other forms.</p>
Labels	<p>During the Activation process, you identified the primary industry in which your enterprise operates. Based on this industry choice, your Vantagepoint database was updated to use industry-specific terminology.</p> <p>Now, on the Labels form, you can further customize terminology. For example, you might change the term "Employees" to "Team Members," "Associates," or "Specialists."</p>
Lists	<p>Throughout Vantagepoint, your users will make choices from drop-down lists. For example, your business development staff will select a value from the Proposal Status field to identify the current state of a proposal.</p> <p>Here, on the Lists form, you can review the values that are pre-set for these drop-down lists. (In the case of Proposal Status, for example, these values are In Progress, In Review, and Submitted.) You can change the default values to better reflect your business needs, add new values, and remove values you do not want.</p>

Set Up Accounting

Use the Accounting page to review and modify your accounts, establish your bank accounts, and set parameters for accounting postings.

Set up Accounting in the desktop application. Accounting has multiple menu options, each focused on a different area. The fields are pre-populated with default entries based on the options you selected during

activation. We recommend you keep the default settings in each area, but you may need to change items that need to be specialized for your enterprise.

Review the default settings in each area and update any fields as needed. You can modify any fields and implement advanced features later in Vantagepoint Settings after the setup process is complete.

Menu Item	Description
Chart of Accounts	Use this option to review the preset default accounts for your firm. You can rename, add, or delete accounts. See the Chart of Accounts Settings help topic for more information.
Company	Use this option to review and update the default settings. See the Accounting Company Settings help topic for more information.
Taxes	Use this option to set up the tax codes that are used to calculate taxes throughout Vantagepoint. See the Tax Code Settings help topic for more information.
Banks	Use this option to set up the bank codes your enterprise uses. See the Bank Codes Setup help topic for more information.
Company AP	Use this option to set up company-wide accounts payable features, including default payment terms, liability codes, vendor types, and discount codes. See the Company Accounts Payable Settings help topic for more information.
Accounts Receivable	Use this option to set up the AR Ledger report and to set up mapping accounts for invoices and accounts receivable. See the Accounts Receivable Settings help topic for more information.

Set Up QuickBooks Integration

You set up the QuickBooks integration with Vantagepoint using the QuickBooks integration utility in Vantagepoint.

To open the utility, select **Utilities » Integrations » QuickBooks** in the Vantagepoint Navigation pane. You can use this utility when you log in to Vantagepoint with your setup credentials to initially activate and set up Vantagepoint, or use it when you log in after the initial setup to complete or modify the QuickBooks integration setup. The same QuickBooks form, tabs, and settings are included in the utility whether you use it during the initial Vantagepoint setup or after the initial setup.

For the integration setup, you connect Vantagepoint with QuickBooks Online, enter other integration settings, and mapping certain records.

Before you can connect Vantagepoint with QuickBooks Online, you must first do the following:

- [Create an Intuit Developer Account](#)
- [Create an Intuit App for Vantagepoint](#)

Then complete the settings on the tabs in the QuickBooks integration utility.

Tab on the QuickBooks Form	Description
Integration Setup	Use the settings on this tab to: <ul style="list-style-type: none"> ▪ Enable QuickBooks integration. ▪ Connect Vantagepoint with QuickBooks Online. ▪ Schedule how often to automatically update the data between the two products. ▪ Enter advanced and default settings.
Accounts Mapping	Use this tab to review and map the general ledger accounts that are linked between Vantagepoint and QuickBooks Online.
Tax Code Mapping	Use this tab to review and map the tax codes that are linked between Vantagepoint and QuickBooks Online.
Employee Mapping	Use this tab to link an employee record with a corresponding vendor record so you can pay an employee in QuickBooks Online for expenses entered in an expense report in Vantagepoint.

For more information about each tab in the QuickBooks integration utility and how to complete the setup, see [QuickBooks Integration Utility](#).

Set Up Integrations

Use the Integrations Setup forms in Utilities to set up integrations between Vantagepoint and other software products and to import data into Vantagepoint from a spreadsheet or other CSV file.

Each of the integration forms applies to a different type of integration.

Form	Description
Ajera	Use this form to set up integration between Vantagepoint and Ajera. This tab has just one check box, Enable Ajera Synchronization .
API Authorization	Use this form if you are licensed to use the Resource Planning module and want to use any APIs to import data from other applications into the Vantagepoint database. Click Generate Secret to generate the Client ID and Client Secret.
GovWin IQ	Use this form to set up integration between Vantagepoint and GovWin IQ, a Deltek service that helps companies find government contract opportunities.
Kona	Use this form to set up integration with the Kona collaboration and communication tool. Before you perform this step, you must obtain a Client ID and Client Secret from Deltek.
Maconomy	Use this form to configure APIs to connect your Maconomy instance to Vantagepoint. This allows you to integrate Maconomy information with Vantagepoint and synchronize user-defined fields and workflow data.

Form	Description
VAT Registrations	Use the VAT Registrations form to configure the subscription license for Vantagepoint to use the vatlayer API system to validate European Union VAT numbers.
Salesforce	Use this form to set up integration between Vantagepoint and Salesforce, including the rules that will control which data is shared between the two applications, when it is shared, and how data is mapped between the two applications. See the Salesforce Integration help topic for more information.
QuickBooks	Use this form to turn on the QuickBooks integration, connect Vantagepoint with QuickBooks Online, run the initialization to copy records from QuickBooks Online to Vantagepoint for the first time, map records, set up the time interval for automatic updating to occur between Vantagepoint and QuickBooks Online, and complete other settings. For more information, see QuickBooks Integration Utility .





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