CRM Showcase Demo - Q&A Recap

Q: Are "Categories" connected to campaigns in Vantagepoint CRM?

A: Categories are not directly tied to campaigns, but they can be used to "tag" contacts and then used as search criteria when building marketing campaigns. That's one of their primary purposes — helping you segment and target more effectively.

Q: Are there plans for Deltek to improve Connect? We've experienced sync issues.

A: If you're experiencing issues with Connect, the best next step is to submit a support case with Deltek. This allows the Cloud/SaaS team to review what's happening in your environment and troubleshoot specific sync issues.

Q: How do we get access to dashboards and hubs?

A: Vantagepoint includes standard dashboards and dashparts out of the box. Access to dashboards is managed by your firm's system administrator, who controls security and visibility. Some dashboards may also be custom-built or tied to newer features, so availability can vary by firm. Hub access is also managed by your firm's system administrator in security.

Q: Do we need to create the Project Dashboard ourselves? I don't see it in our system.

A: Project dashboards are managed by an administrator. If you're not seeing one, it may not have been set up yet or you may not have access based on security settings. Vantagepoint does include standard dashboards, but they must be enabled and shared.

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Q: We have dashboards, but they don't look like the demo version. Why?

A: The demo environment may include newer dashboard features or enhancements that were added in more recent Vantagepoint releases. If you'd like help exploring dashboard options or updating your setup, a consultant can walk through what's available in your version and how to take advantage of newer functionality.

Q: Can a contact be associated with two different firms in Vantagepoint?

A: A single contact record can't be linked to two separate company records. However, Vantagepoint does allow a contact to be assigned as a primary contact on a project even if they're not associated with that company record.
Another option is to use a parent company structure for joint ventures, which can help contacts appear appropriately without duplicating records. Duplicating contacts is generally only recommended if the individual has a different email address.

Q: In the Projects Hub, how was the "Link to Definitions" created, and where does it go?

A: That link was created using a custom field in screen designer. When setting up custom fields in Vantagepoint, there's an option to define the field as a URL or clickable link, which can point users to definitions, documentation, or other helpful resources.

Additional Dashpart

My Pursuits + Linked Promo Cost

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Project Name	Estimated Fee	Stage	Promo Project Name	Linked Promo Actual Cost	Linked Promo Hours	% Of Est Fee
TOTALS	**900,000 USD**			**12,203**	**348.40**	
Quincy High School Band Building	650,000 USD	04 - Proposal Submitted	MKT - Quincy High School Band Bui	5,104	143.40	0.79
Trombone Shorty's New Orleans Co	250,000 USD	01 - Lead	MKT - Trombone Shorty's NOLA Cot	7,098	205.00	2.84

The My Pursuits + Linked Promo Cost Dashpart shows the stage of the pursuit and compares the estimated fee to the pursuit cost (time and expense) that is tracked on the Linked Promotional. This gives insight into the cost of pursuing work versus potential fee.