

# Deltek Vision<sup>®</sup> Connect for Microsoft Outlook<sup>®</sup>

## A More Intuitive Way to Manage Business Development

### VISION CONNECT FOR MICROSOFT OUTLOOK:

- Enables entry, maintenance and review of key Vision CRM records in Outlook
- Supports full Outlook drag-and-drop, grouping and search capabilities
- Maintains all Deltek Vision security controls
- Works in both online and offline modes

Managing your business development and customer relationships with marketing and CRM is great when effectively used, but getting firm-wide adoption can be a challenge. That's why Deltek has created Vision Connect for Microsoft Outlook, a solution that integrates Deltek Vision with Microsoft Outlook. Vision Connect enables business development and marketing professionals to perform important and common Vision tasks directly in Microsoft Outlook – saving time and increasing user adoption of your CRM system.

Business Development professionals use Vision Connect to manage their business appointments, emails and contacts, as well as manage their clients, activities and opportunities – all from Outlook. By enabling personnel to manage Deltek Vision records directly in Microsoft Outlook, you'll increase user adoption.

Just as easily as people send emails with the click of a mouse, activities are tracked so information can be shared – expanding the value of your Knowledge Repository.

### KEY FEATURES AND BENEFITS OF DELTEK VISION CONNECT

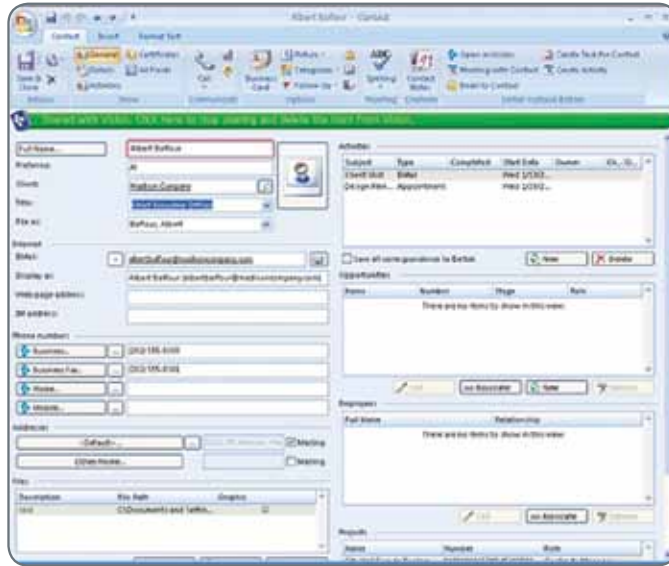
- Manage Deltek Clients, Contacts, Vendors, Opportunities and Activities directly in Outlook, saving time and making updates easier
- Manage appointments and tasks related to Deltek Vision records and link them to other Deltek records directly in Outlook, making it easy to maintain a history of activities with Clients
- Manage emails and link them to Deltek records directly in Outlook, making it easy to maintain a history of communications with Clients
- Utilize bi-directional, incremental synchronization to ensure information in Deltek Vision stays up-to-date, which allows you to perform work even when disconnected
- Organize all your data in one unified workspace inside of Microsoft Outlook – it's easy-to-use and there's no longer a need to juggle multiple programs



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Microsoft Outlook Contact form synchronized with Deltek Vision Contacts

Vision Connect streamlines and enhances many important processes for business development professionals.

**CLIENT, VENDOR AND OPPORTUNITY MANAGEMENT**

It's easier than ever to enter and update client, vendor and opportunity records (including support for clients that are also vendors) within intuitive Outlook forms. Set filters to bring down personalized lists of Deltek records to get just your records. You'll have access to the key records you use in Microsoft Outlook at your fingertips.

**CONTACT MANAGEMENT**

Using Vision Connect for Microsoft Outlook, you can now maintain Vision contact information within the native Outlook contact form. There is no need for multiple contacts folders – you can manage your personal and business contacts that are shared and stored in Deltek Vision all in one place.

**EMAIL MANAGEMENT**

Create and send emails in Microsoft Outlook as you always do and capture those within Deltek Vision with a new "send and create activity" button. You can capture attachments to create permanent activity records and link email attachments to appropriate records within Deltek Vision.

You also have the option of electing to have all correspondence with a specific set of contacts automatically create activity records to maintain a history of communications with clients.

**BI-DIRECTIONAL SYNCHRONIZATION**

Stay in sync with bi-directional synchronization that ensures information between Vision Connect for Microsoft Outlook and the Vision application stays up-to-date and consistent. You can perform work with Vision data in Outlook even when you are offline that then synchronizes when you re-connect. This means that you can enter information anytime – even without an Internet connection. Complete updates when it's convenient – no matter where you are, and synchronize when you are back in the office.

**INCREASE USER ADOPTION**

One unified workspace inside of Microsoft Outlook means it's easy-to-use and there's no longer a need to juggle multiple programs. Business Development professionals can simplify their daily routine which translates to more time with clients and winning new business. By using a familiar, easy-to-use tool like Microsoft Outlook, Vision Connect increases the adoption rate of the tools, which leads to greater visibility and better decision making for your firm.

