

Deltek.

Maconomy Essentials

iAccess Customer Creation
Quick Steps



Create a Customer

1

Step 1: Access the Customers workspace.

2

Step 2: Enter the customer information in the Create Customer wizard.

3

Step 3: Edit the customer information.

4

Step 4: Submit the Customer Information.

JOB

Jobs

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Revenue Recognition

Customers

Active Customers

78 of 375+

+ New Customer

Danisco Seed
10075

Save | Revert | Submit | Other Actions

INFORMATION | JOBS | SUBSCRIPTION ORDERS | INVOICES | REMINDER LETTERS | INTEREST CHARGE NOTICES | DOCUMENTS | OPEN ENTRY STATEMENT

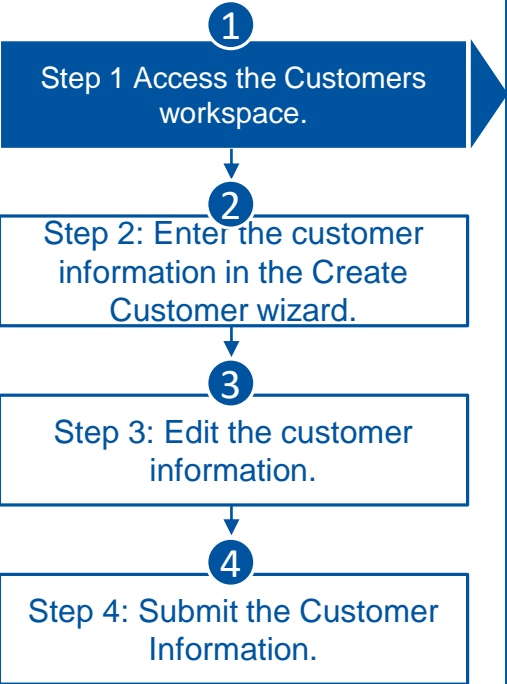
Overview of Quick Steps procedure

Click the numbered circles on the left to move to the first step in each phase.

Use the arrows or Pg Up/Down keys to proceed through each step and sub-step.

Begin

Create a Customer



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Customers | Active Customers | 78 of 375+ | + New Customer

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Save | Reveal | Commit | Other Actions | Open

- INFORMATION**
- JOBS
- SUBSCRIPTION ORDERS
- INVOICES
- REMINDER LETTERS
- INTEREST
- FINANCIAL ENTRY STATEMENT

Address: 4960 Holeby Denmark | Bill to Customer: Danisco Seed 10075 | CRM Integration: None

Attn.: None | Account Manager: None | Sales Person: None

▼ Details

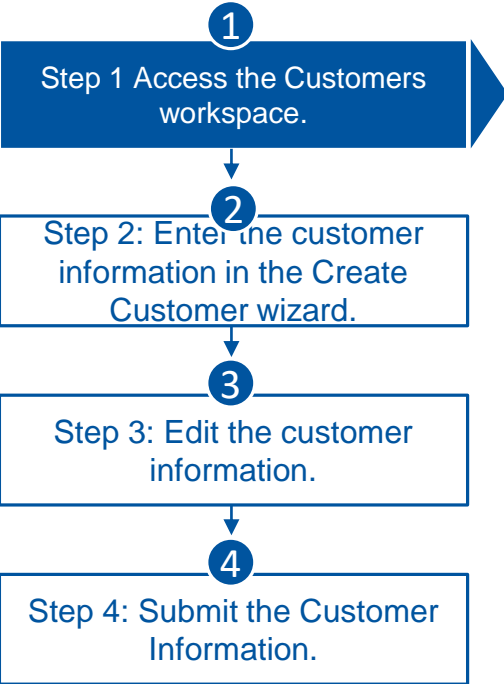
Currency: DKK | Language: Danish | Sales Price List: Standard

Customer Type: None | Customer Group: All | Specification 1: Standard -

A Under the Customers menu section, click the Customers workspace.

B Click + New Customer.

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Customer

Danisco S
10075

INFORMATION

Address: 4960 H
Denma

Responsible

Our Contact: Nor

Employee 7: Nor

Details

Currency: DKK

Customer Type: /

Create Customer

Customer _____

Name

Customer No.

Address 1

Address 2

Address 3

Zip Code Postal District

Country

Address 4

Attn.

Phone

E-mail

Parent Customer _____

Customer

Linking Rule

Responsible Staff _____

Account Manager

Sales Person

78 of 375+ + New Customer

Save | Revert | Submit | Other Actions

Open

SE NOTICES DOCUMENTS OPEN ENTRY STATEMENT

Sales Person: None

Sales Price List: Standard

Specification 1: Standard -

The Create Customer wizard displays.

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INFORMATION JOBS

Address: 4960 Holeby
Denmark

Responsible Staff

Our Contact: None

Employee 7: None

Details

Currency: DKK

Customer Type: None

Create Customer

Customer

Name

Gabrielle Luke

Customer No.

Blank for Default

Address 1

Address 2

Address 3

Zip Code

Postal District

Country

Address 4

Attn.

49-521-99200

E-mail

Parent Customer

Customer

Danisco ingredients

10006

Linking Rule

Responsible Staff

Account Manager

James Grotto

2009

Sales Person

Employee 7

Create

A

Fill out the Name field. This is a required field.

B

Fill out the other fields as needed.

Click Create.

C

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Step 1: Access the Customers workspace.

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Step 2 Enter the customer information in the Create Customer wizard.

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Step 3: Edit the customer information.

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Step 4: Submit the Customer Information.

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Gabrielle Luke

-0110003

Save | Revert | Submit | Other Actions

Open

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OPEN ENTRY STATEMENT

Address: 8220 Brabrand
Denmark
Phone: 49-521-99200

Bill to Customer: Gabrielle Luke -0110003

CRM Integration: None

Attn.: None

Responsible Staff

Our Contact: None

Account Manager: James Grotto 2009

Sales Person: None

Employee 7: None

Details

Currency: DKK

Language: Danish

Sales Price List: Standard

Customer Type: None

Customer Group: All

Specification 1: Standard -

iAccess saves your changes, and automatically displays the information for the customer you just created.

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Step 1: Access the Customers workspace.

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Step 2: Enter the customer information in the Create Customer wizard.

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Step 3: Edit the customer information.

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Step 4: Submit the Customer Information.

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Customers Active Customers 1 of 375+ + New Customer

Cloud Customer 01 -0110001

Click the filter list.

A Under the Customers menu section, click the Customers workspace.

B

INFORMATION	JOB	SUBSCRIPTION ORDERS	INVOICES	REMINDER LETTERS	INTEREST CHARGE NOTICES
Address: Australia michaelmorales@deltek.com	Bill to Customer: Cloud Customer 01 -0110001	CRM Integration: None	Attn.: None	Account Manager: None	Sales Person: Cloud PM EN11111903
▼ Details	Currency: DKK	Language: Danish	Sales Price List: Standard	Customer Type: None	Customer Group: All
					Specification 1: IT/Telecommunications 16

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Step 2: Enter the customer information in the Create Customer wizard.

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Step 3 Edit the customer information.

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Step 4: Submit the Customer Information.

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Customer No.	Name	Country	Account Manager	Customer Group
..X..	X..	=	..X..	=
-0110001	Cloud Customer 01	Australia		All
-0110002	MD - AM Cust1	Denmark		All
-0110003	Gabrielle Luke	Denmark	James Grotto	All
10000	Testing Customer (To be filled in)			All
10001	Chr. &Hansen	Denmark		All
10002	Unizyme Laboratories A/S	Denmark		All
10003	Novo Nordisk A/S, Bagsværd	Denmark		All
10004	Novozymes	Denmark		All
10005	ALK Abello A/S	Denmark		All
10006	Danisco ingredients	Denmark		All
10007	Merck	Germany		All
10008	Novo Nordisk, Kalundborg	Denmark		All
10009	Force Technology	Denmark		All
10010	Biovision	Denmark		All
10011	SIK AB	Sweden		All
10012	Miljø-Energiministeriet	Denmark		All
10013	Agro & ferm A/S	Denmark		All
10014	Copenhagen Biotech Assets ApS	Denmark		All
10015	Arla Foods Udviklingscenter	Denmark		All

C

Select the Customer record you want to update.

Create a Customer

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Step 1: Access the Customers workspace.

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Step 2: Enter the customer information in the Create Customer wizard.

3

Step 3 Edit the customer information.

4

Step 4: Submit the Customer Information.

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Save | Revert | Submit | Other Actions

From the Other Actions drop-down list, select **Edit**.

D

Edit

Attach Documents

Address: 8220 Brabrand
Denmark
Phone: 49-521-99200

Bill to Customer: Gabrielle Luke -0110003
Attn.: None

Responsible Staff

Our Contact: None

Account Manager: James Grotto 2009

Sales Person: None

Employee 7: None

Details

Currency: DKK

Language: Danish

Sales Price List: Standard

Customer Type: None

Customer Group: All

Specification 1: Standard -

Create a Customer

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Step 1: Access the Customers workspace.

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Step 2: Enter the customer information in the Create Customer wizard.

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Step 3 Edit the customer information.

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Step 4: Submit the Customer Information.

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Cancel

Save

Open

-0110003

INFORMATION

E

Go to the Information tab.

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SUBSCRIPTION ORDERS

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INTEREST CHARGE NOTICES

DOCUMENTS

OPEN ENTRY STATEMEN

Address

Name 2

Name 3

Name 4

8220

Brabrand

Denmark

Name 5

Attn.

Attn.

Phone

49-521-99200

E-mail

CRM Integration

Responsible Staff

Our Contact

Account Manager

Sales Person

Employee 7

James Grotto

2009

Details

Currency

DKK

Language

Danish

Sales Price List

Stand...

Customer Type

Customer Group

All

Specification 1

Standard

Create a Customer

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Step 1: Access the Customers workspace.

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Step 2: Enter the customer information in the Create Customer wizard.

3

Step 3 Edit the customer information.

4

Step 4: Submit the Customer Information.

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Cancel

Save

-0110003

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Click Save.

Address

Name 2

Name 3

Name 4

8220 Brabrand

Denmark

Name 5

Attn.

Attn.

Phone

49-521-99200

E-mail

Bill To Customer

Gabrielle Luke

-0110...

Attn.

CRM Integration

Responsible Staff

Our Contact

2016
Art Rivers

2020
Laurie Forbes

2026
Fay Miller

2040
Ben Hunter

2071

Account Manager

James Grotto

2009

Sales Person

Language

Danish

Sales Price List

Stand...

Customer Group

All

Specification 1

Standard

F

Edit the fields as needed.

G

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Step 1: Access the Customers workspace.

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Step 2: Enter the customer information in the Create Customer wizard.

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Step 3 Edit the customer information.

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Step 4: Submit the Customer Information.

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Open

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OPEN ENTRY STATEMENT

Address: 8220 Brabrand
Denmark
Phone: 49-521-99200

Bill to Customer: Gabrielle Luke -0110003

CRM Integration: None

Attn.: None

Responsible Staff

Our Contact: Art Rivers 2016

Account Manager: James Grotto 2009

Sales Person: None

Employee 7: None

Details

Currency: DKK

Language: Danish

Sales Price List: Standard

Customer Type: None

Customer Group: All

Specification 1: Standard -

iAccess saves your changes, and refreshes the browser window.

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Step 1: Access the Customers workspace.

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Step 2: Enter the customer information in the Create Customer wizard.

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Step 3: Edit the customer information.

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Step 4: Submit the customer information.

APPROVALS

- Approval Center
- Absence Approval
- Allowance Approval

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Save | Revert | **Submit** | Other Actions

Gabrielle Luke -0110003

INFORMATION | JOBS | LETTERS | INTEREST CHARGE NOTICES | STATEMENT

Address: 8220 Brabrand Denmark
Phone: 49-521-99200
Attn.: None

Responsible Staff

Our Contact: Art Rivers 2016
Account Manager: James Grotto 2009
Sales Person: None

Employee 7: None

Details

Currency: DKK
Language: Danish
Customer Group: All
Sales Price List: Standard
Specification 1: Standard -

A Under the Customers menu section, click the Customers workspace.

B Open the customer record you created or edited.

C Click **Submit**.

Create a Customer

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Step 1: Access the Customers workspace.

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Step 2: Enter the customer information in the Create Customer wizard.

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Step 3: Edit the customer information.

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Step 4: Submit the customer information.

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- Absence Approval
- Allowance Approval

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Gabrielle Luke -0110003 Submitted

INFORMATION JOBS SUBSCRIPTION ORDERS INVOICES REMINDER LETTERS INTEREST CHARGE NOTICES DOCUMENTS OPEN ENTRY STATEMENT

Address: 8220 Brabrand Denmark Phone: 49-521-99200 Bill to Customer: Gabrielle Luke -0110003 CRM Integration: None Attn.: None

Responsible Staff Our Contact: Art Rivers 2016 Account Manager: James Grotto 2009 Sales Person: Michiko Dy 1840008 Employee 7: None

Details Currency: DKK Language: Danish Sales Price List: Standard Customer Type: None Customer Group: All Specification 1: Standard -

iAccess saves your changes, and refreshes the browser window.

Note: Submit is only available if you are using approval hierarchies for Customer creation and update.

Create a Customer

1

Step 1: Access the Customers workspace.

2

Step 2: Enter the customer information in the Create Customer wizard.

3

Step 3: Edit the customer information in the Create Customer wizard.

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Step 4: Submit the Customer Information.

APPROVALS

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Submitted

INFORMATION | JOBS | SUBSCRIPTION ORDERS | INVOICES | REMINDER LETTERS | INTEREST CHARGE NOTICES | DOCUMENTS | OPEN ENTRY STATEMENT

Address: 8220 Brabrand
Denmark
Phone: 49-521-99200

Bill to Customer: Gabrielle Luke -0110003

CRM Integration: None

Attn: None

Responsible Staff

Our Contacts: Art Rivers 2018

Account Manager: James Guthrie 2000

Sales Director: Michelle By 1840008

Employee To: None

Details

Currency: DKK

Customer Type: None

This concludes iAccess Customer Creation Quick Steps.