Deltek

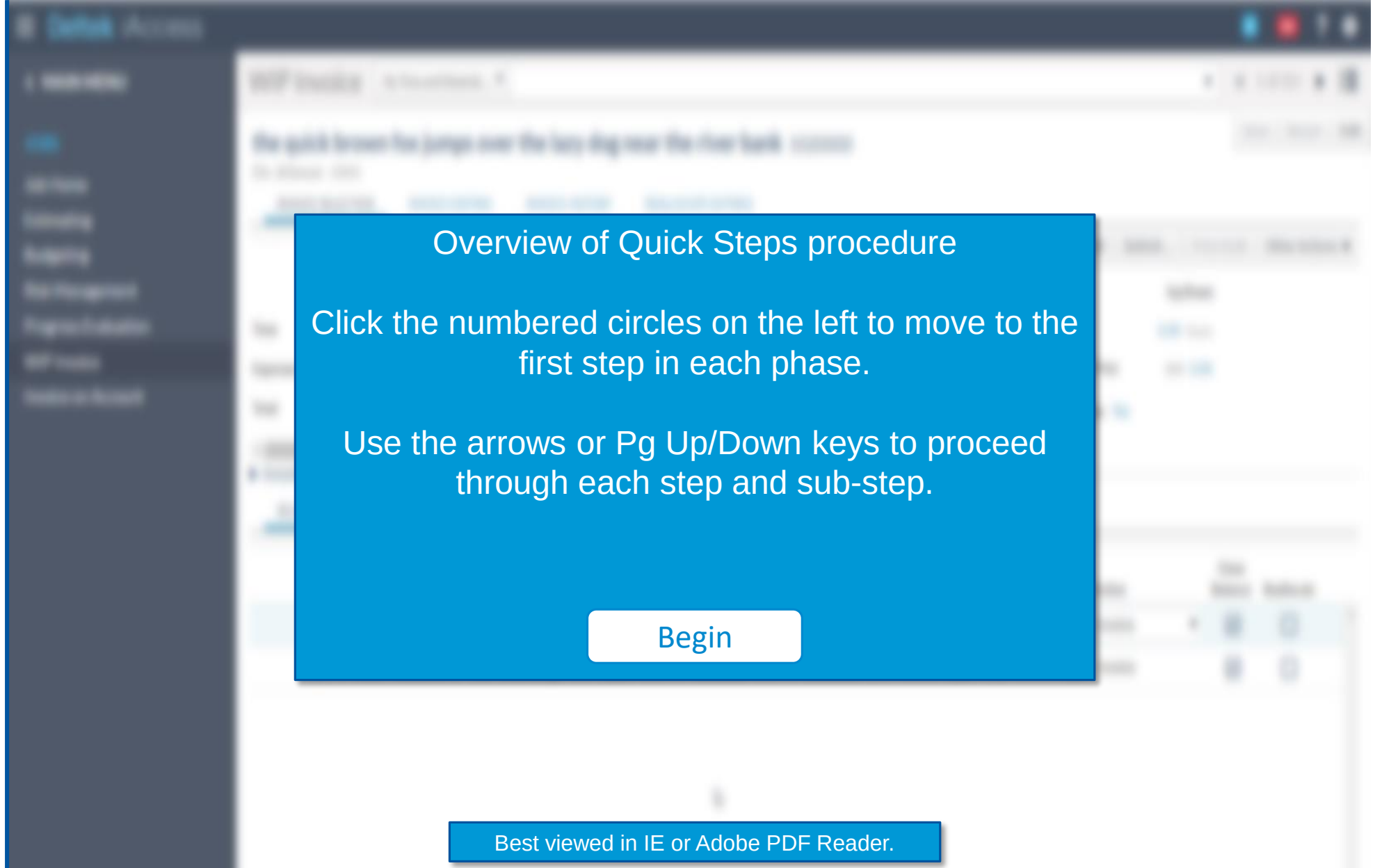
Maconomy Essentials

iAccess Invoice on Account

Quick Steps

Invoice on Account

1. Step 1: Locate a job.
2. Step 2: Transfer invoicing plan.
3. Step 3: Approve edits to draft.
4. Step 4: View and print draft invoice.
5. Step 5: Submit draft for approval or print invoice.



Overview of Quick Steps procedure

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

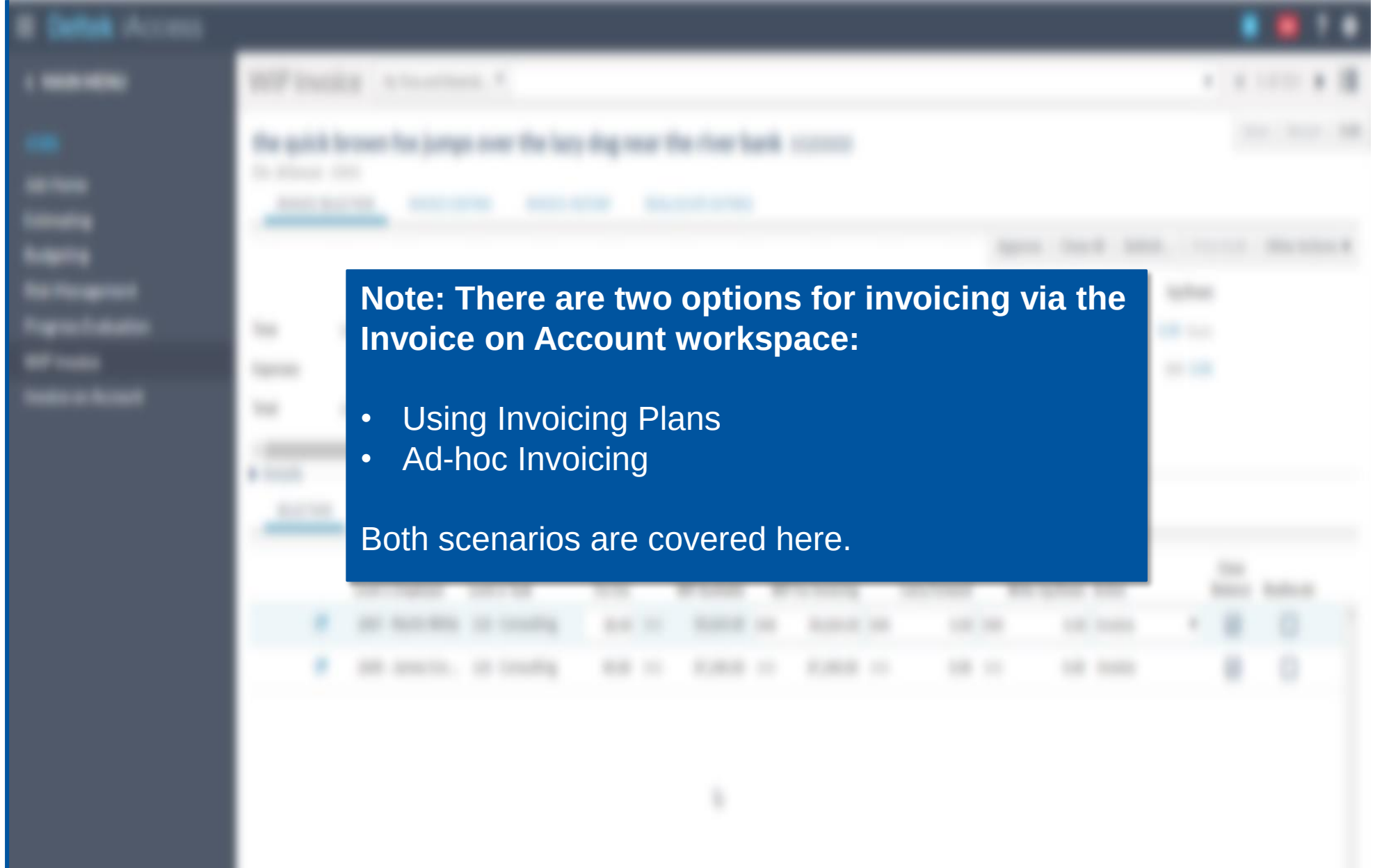
Use the arrows or Pg Up/Down keys to proceed through each step and sub-step.

Begin

Best viewed in IE or Adobe PDF Reader.

Invoice on Account

1. Step 1: Locate a job.
2. Step 2: Transfer invoicing plan.
3. Step 3: Approve edits to draft.
4. Step 4: View and print draft invoice.
5. Step 5: Submit draft for approval or print invoice.

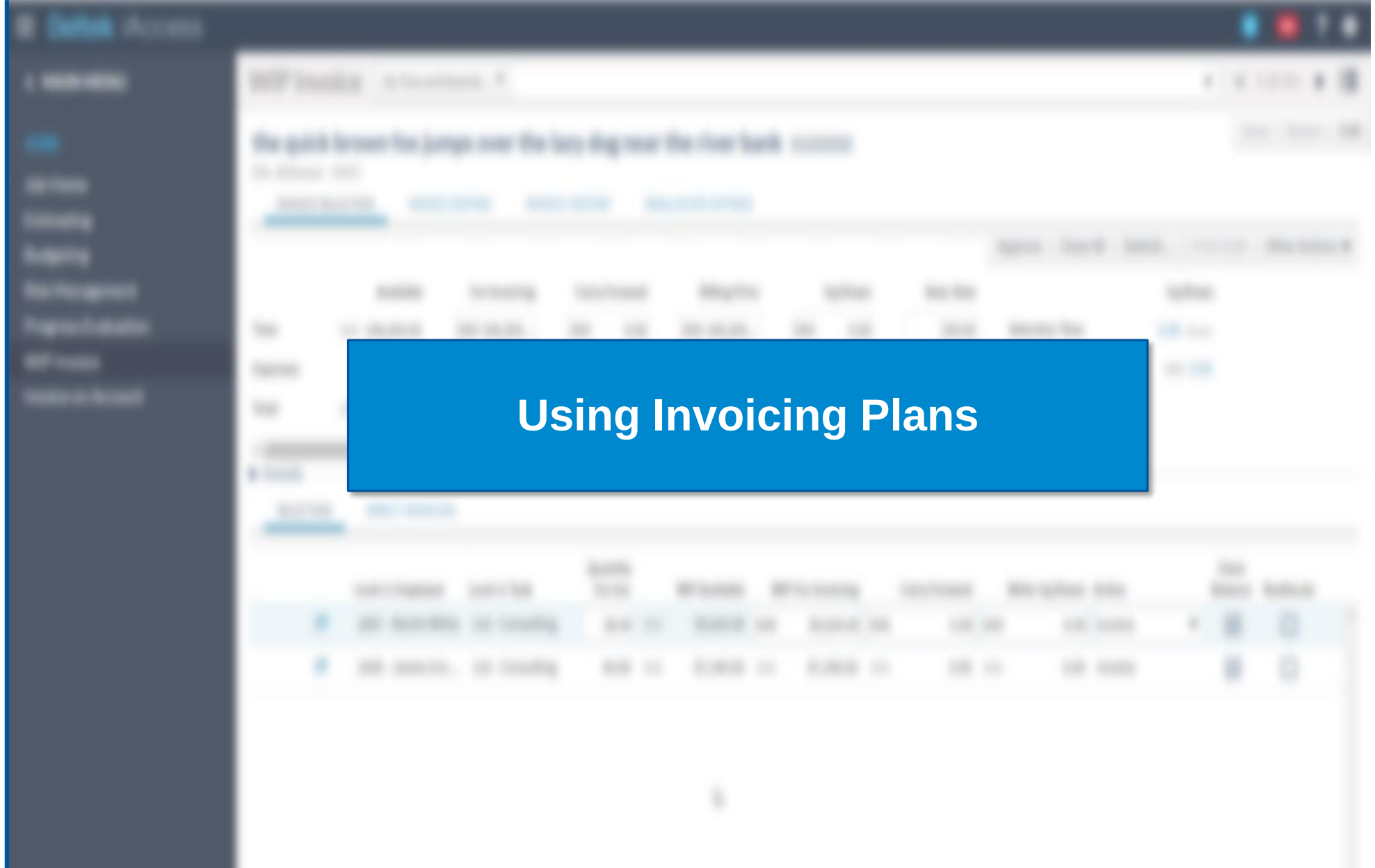


Note: There are two options for invoicing via the Invoice on Account workspace:

- Using Invoicing Plans
- Ad-hoc Invoicing

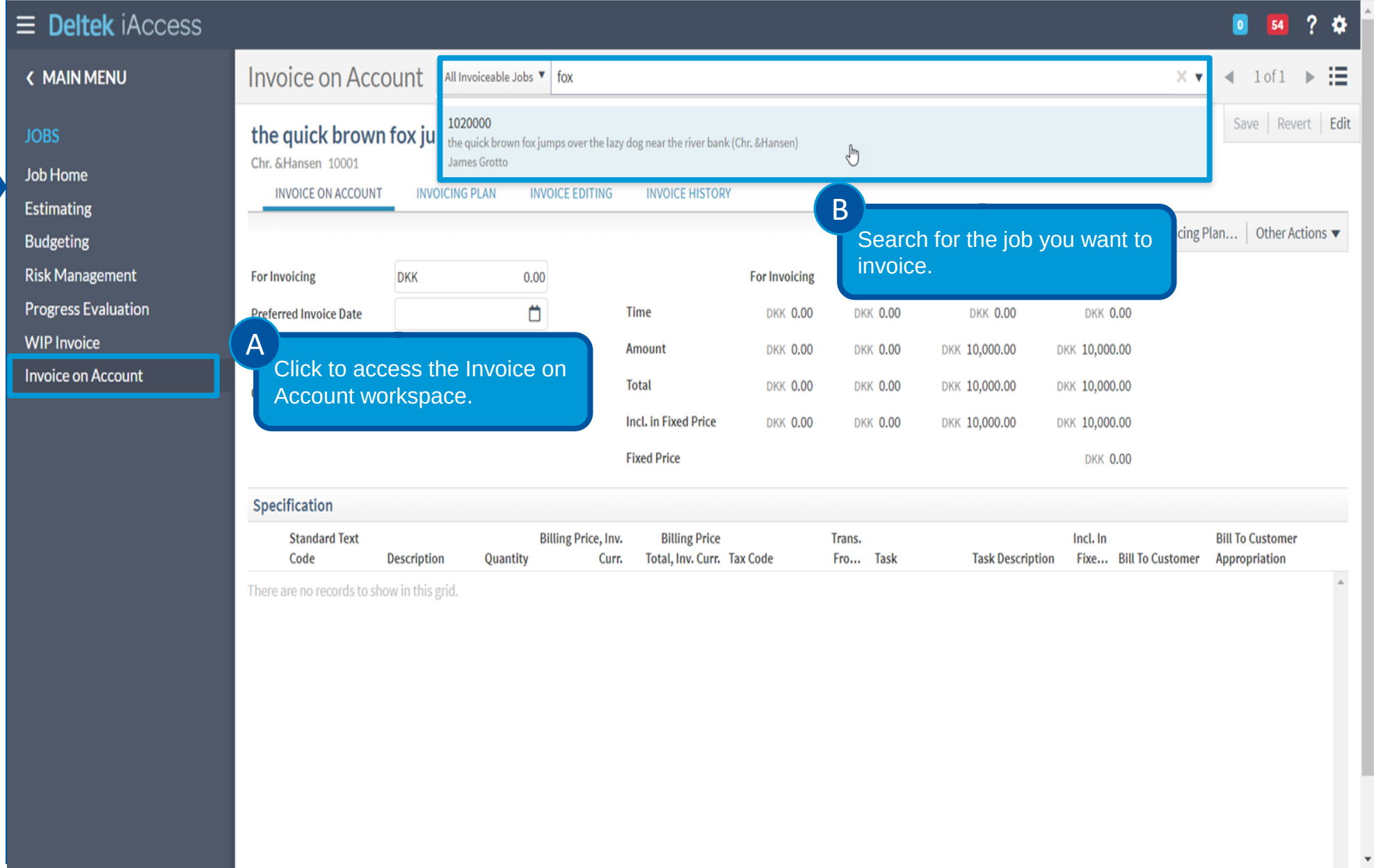
Both scenarios are covered here.

Invoice on Account
Using Invoicing Plans



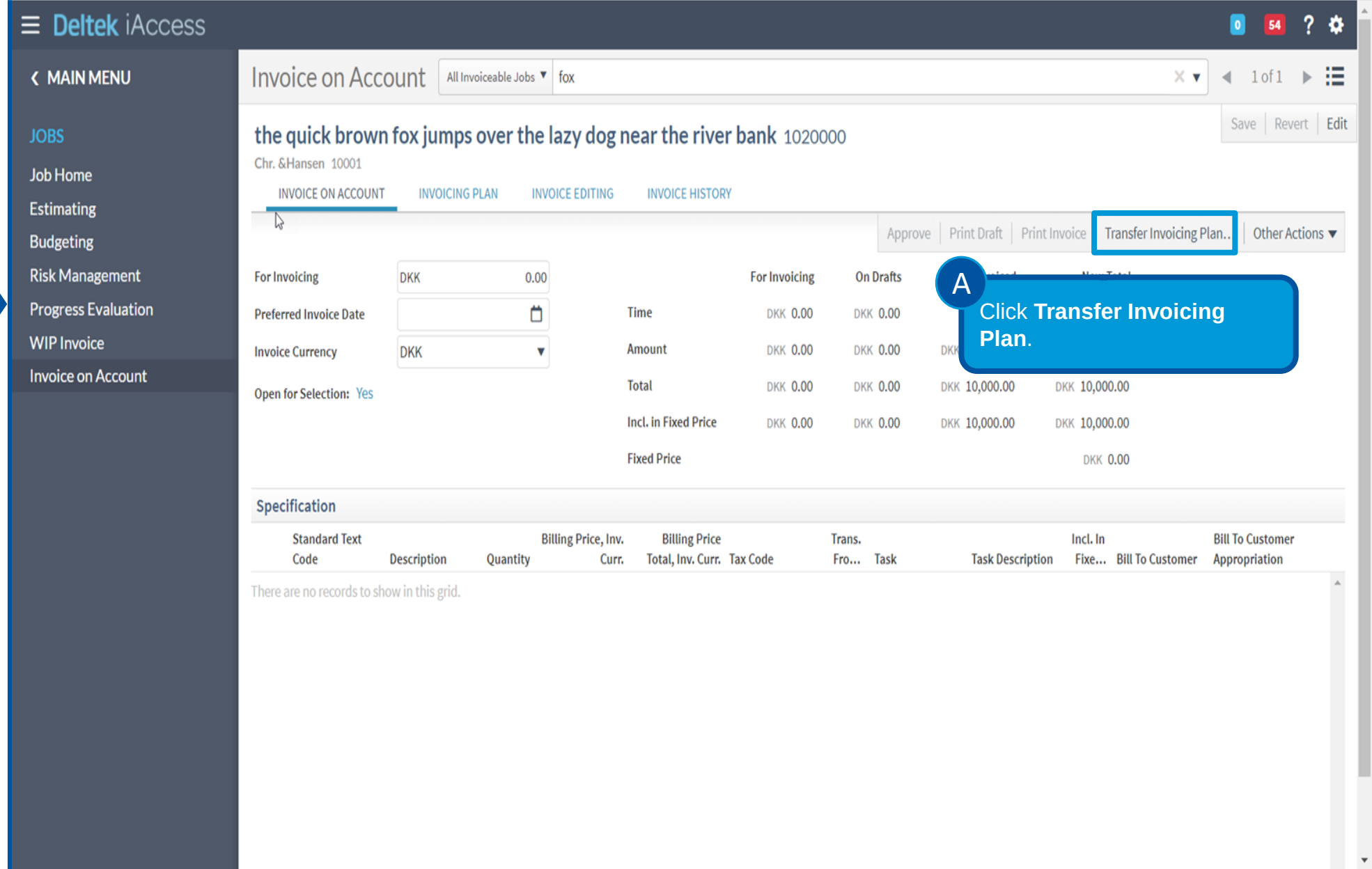
Invoice on Account
Using Invoicing Plans

1. Step 1: Locate a job.
2. Step 2: Transfer invoicing plan.
3. Step 3: Approve edits to draft.
4. Step 4: View and print draft invoice.
5. Step 5: Submit draft for approval or print invoice.



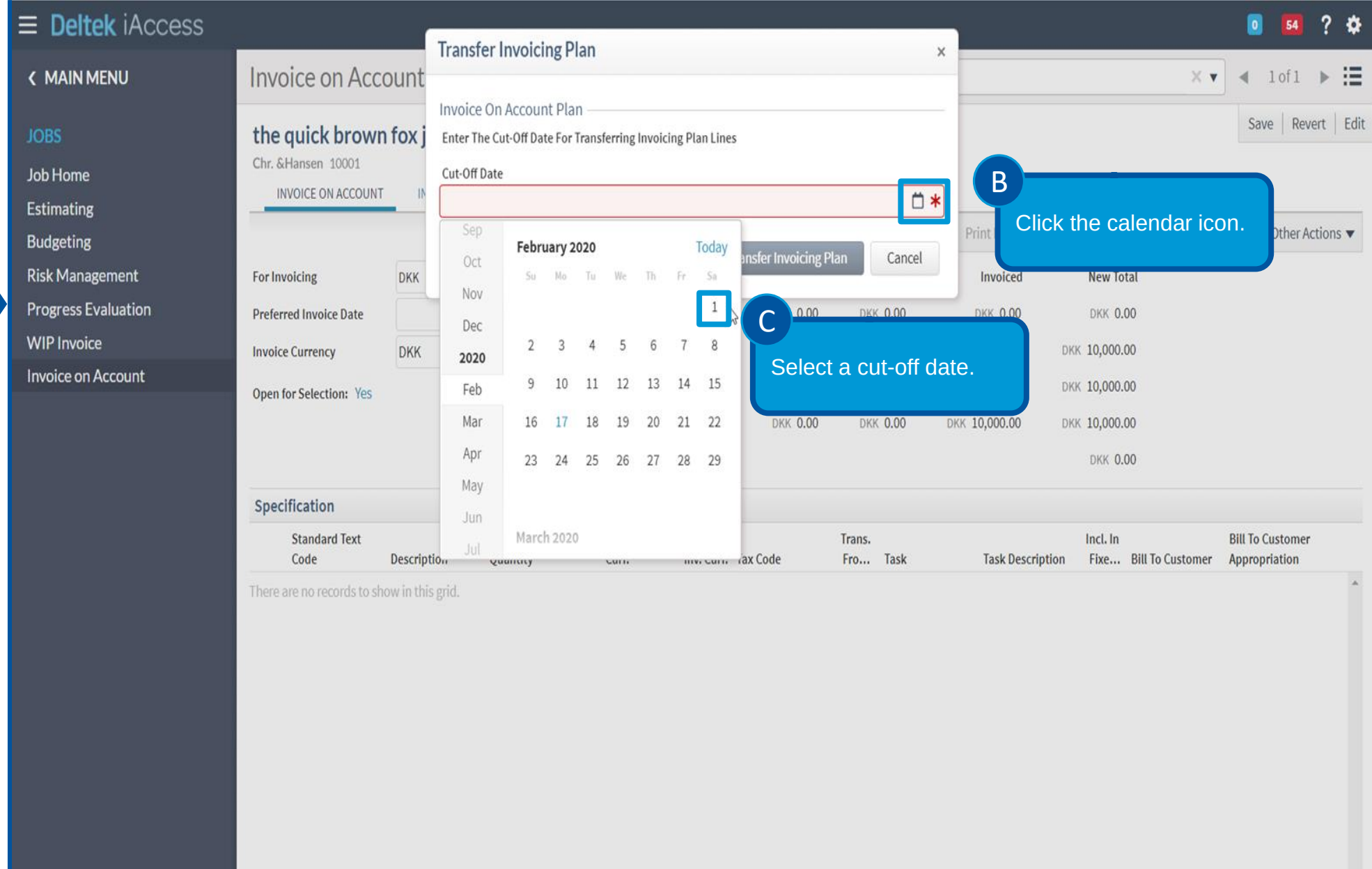
Invoice on Account
Using Invoicing Plans

1. Step 1: Locate a job.
2. Step 2: Transfer invoicing plan.
3. Step 3: Approve edits to draft.
4. Step 4: View and print draft invoice.
5. Step 5: Submit draft for approval or print invoice.



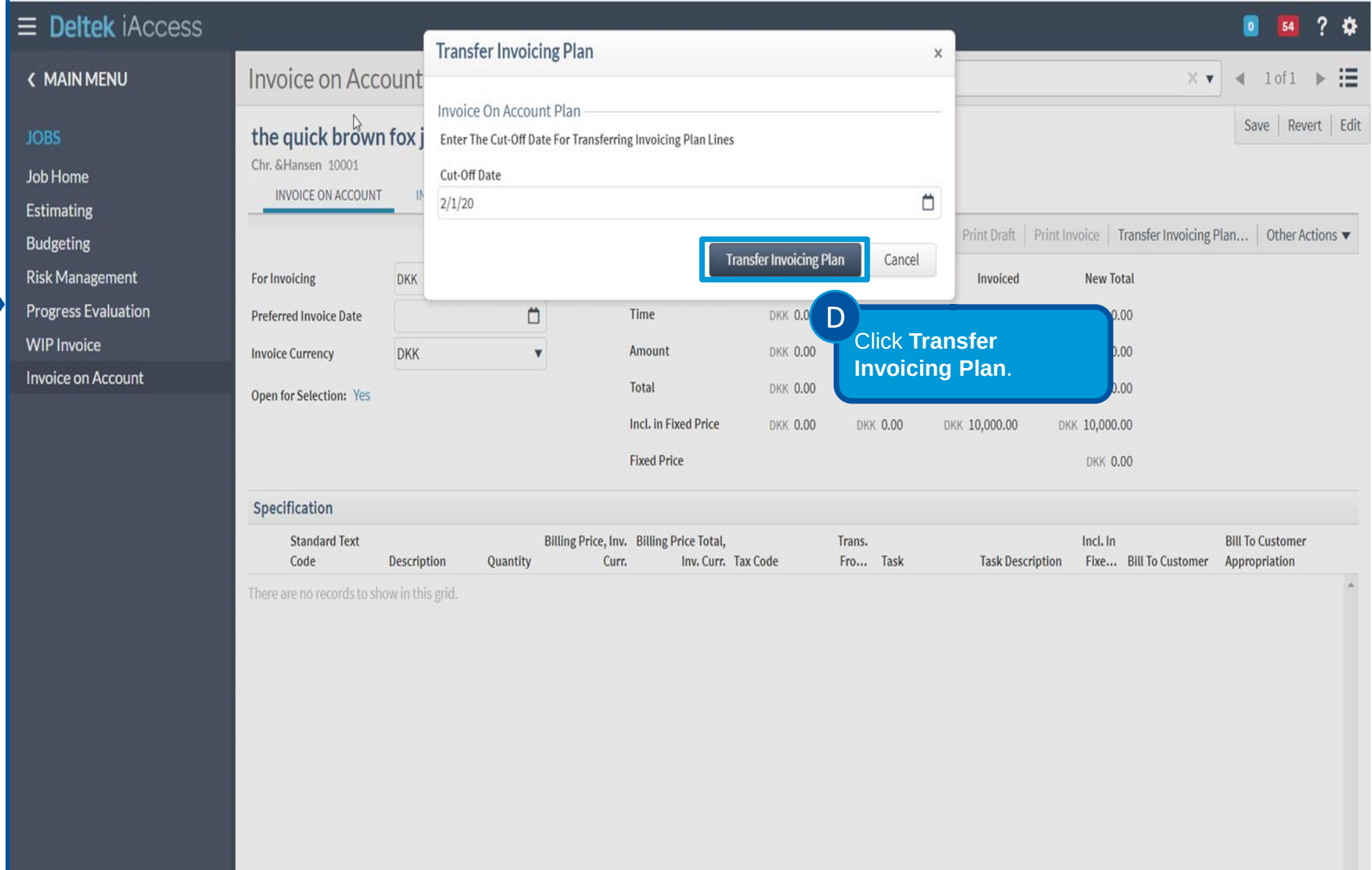
Invoice on Account
Using Invoicing Plans

1. Step 1: Locate a job.
2. Step 2: Transfer invoicing plan.
3. Step 3: Approve edits to draft.
4. Step 4: View and print draft invoice.
5. Step 5: Submit draft for approval or print invoice.



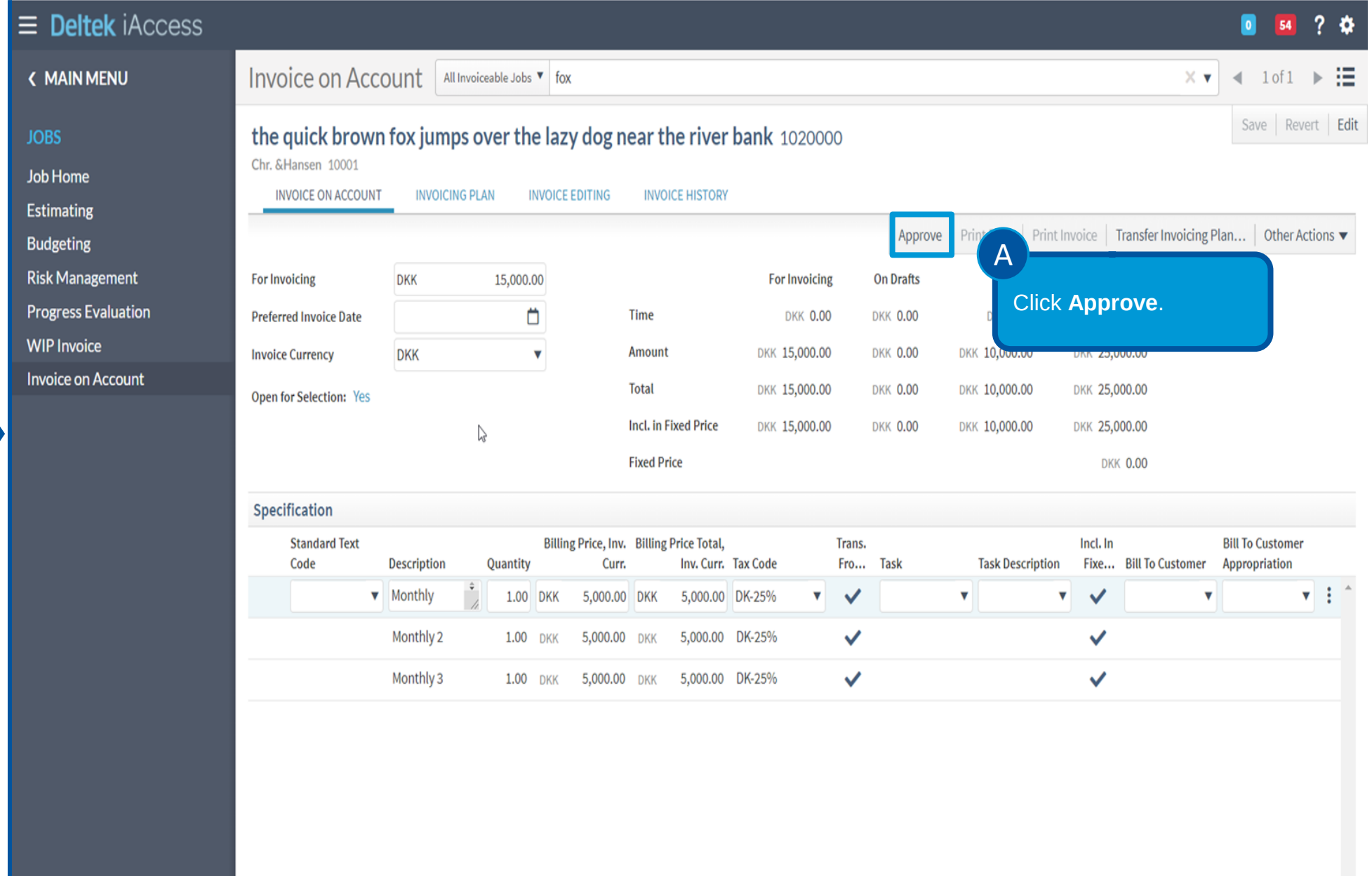
Invoice on Account
Using Invoicing Plans

1. Step 1: Locate a job.
2. Step 2: Transfer invoicing plan.
3. Step 3: Approve edits to draft.
4. Step 4: View and print draft invoice.
5. Step 5: Submit draft for approval or print invoice.



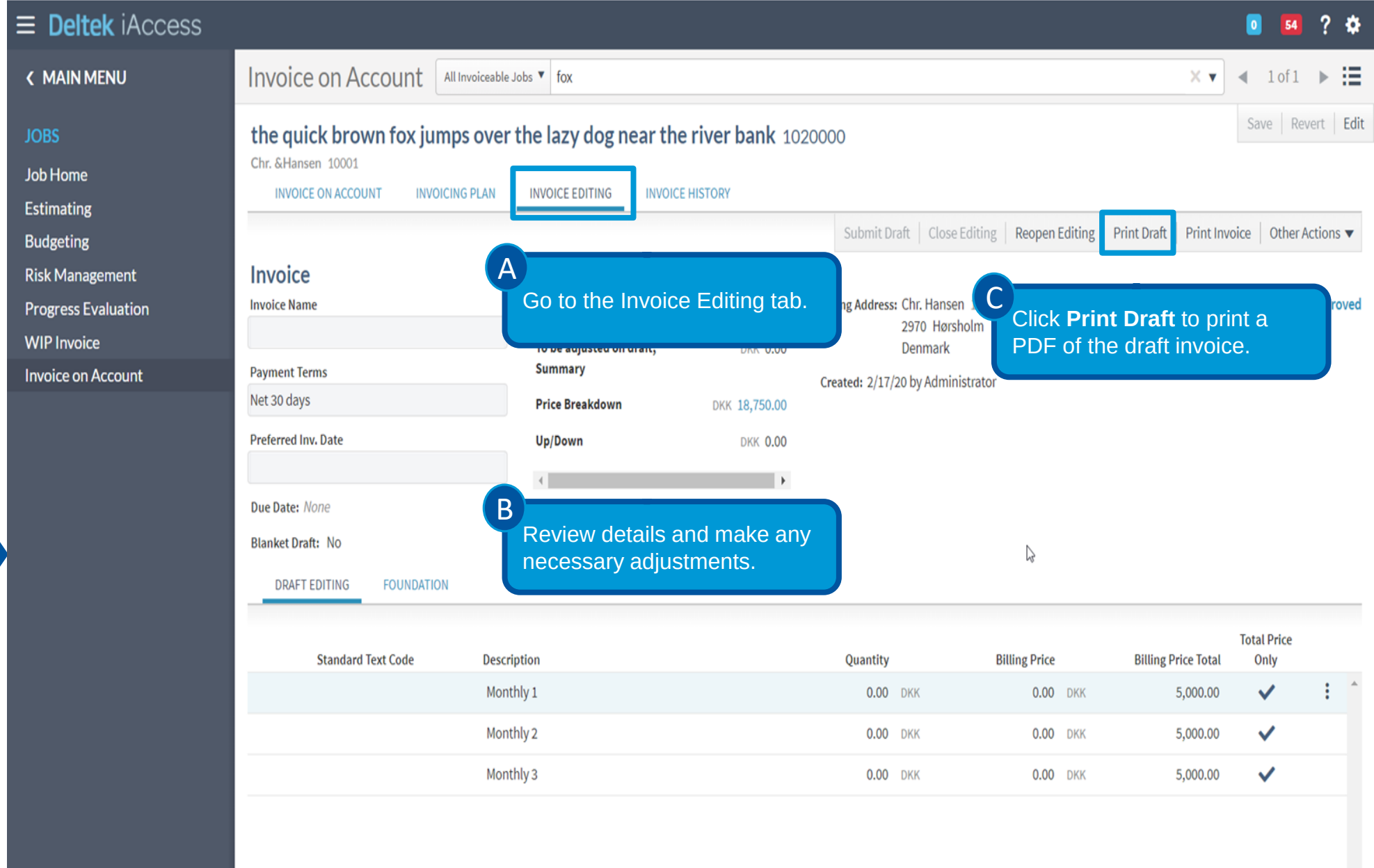
Invoice on Account
Using Invoicing Plans

1. Step 1: Locate a job.
2. Step 2: Transfer invoicing plan.
3. Step 3: Approve edits to draft.
4. Step 4: View and print draft invoice.
5. Step 5: Submit draft for approval or print invoice.



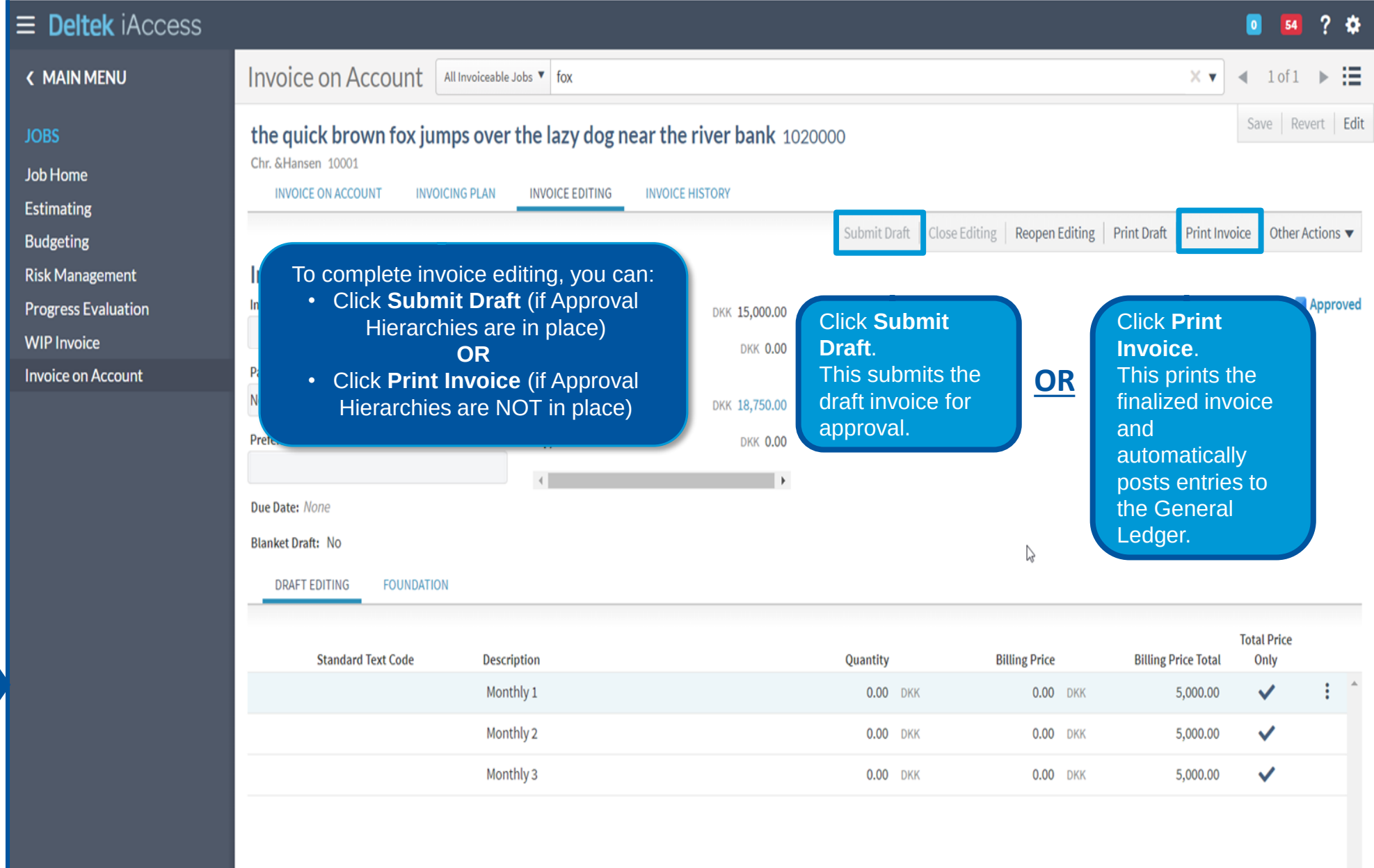
Invoice on Account
Using Invoicing Plans

1. Step 1: Locate a job.
2. Step 2: Transfer invoicing plan.
3. Step 3: Approve edits to draft.
4. **Step 4: View and print draft invoice.**
5. Step 5: Submit draft for approval or print invoice.

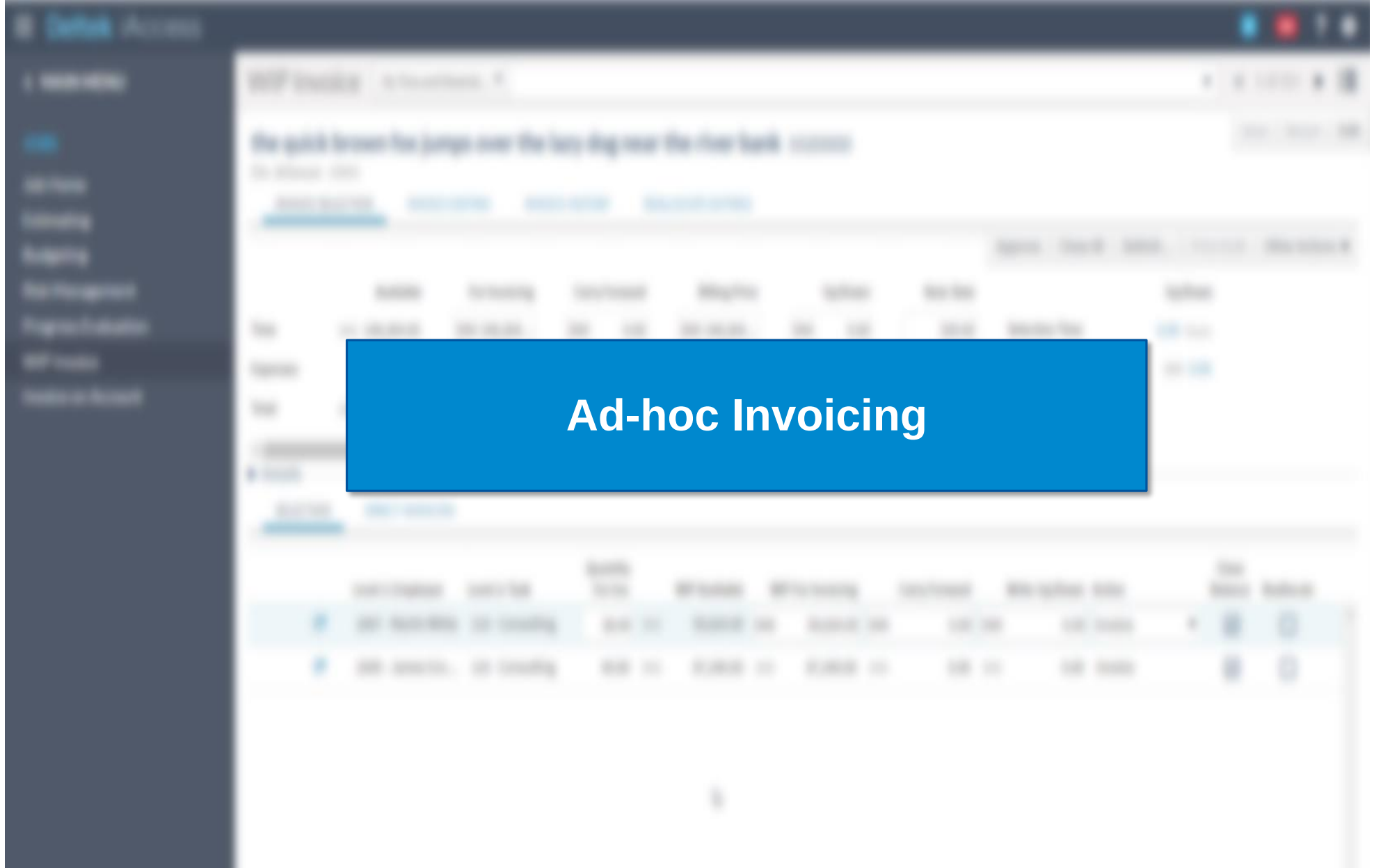


Invoice on Account

1. Step 1: Locate a job.
2. Step 2: Edit the invoice.
3. Step 4: Approve edits to draft.
4. Step 5: View and print draft invoice.
5. Step 6: Submit draft for approval or print invoice.

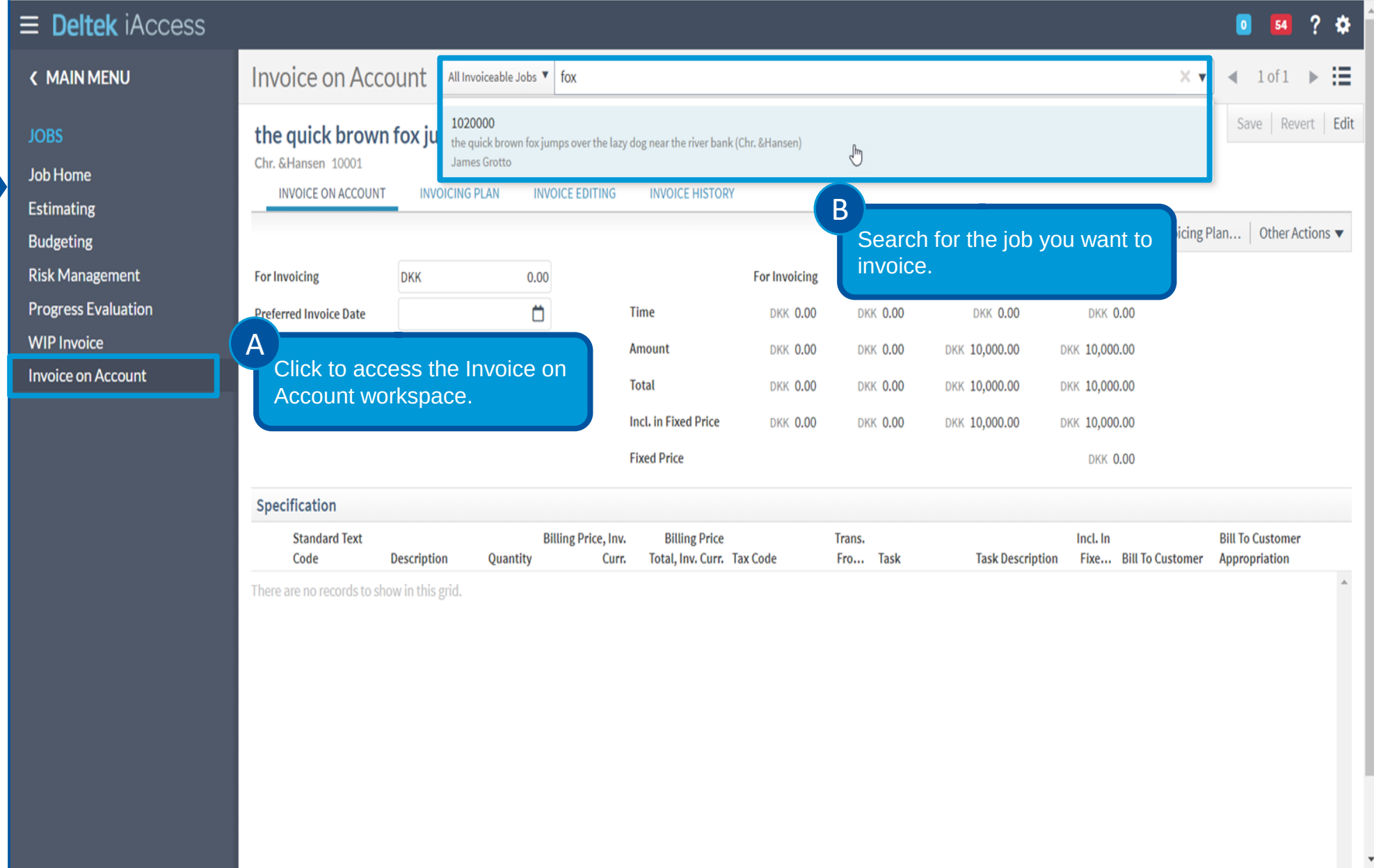


Invoice on Account
Ad-hoc Invoicing



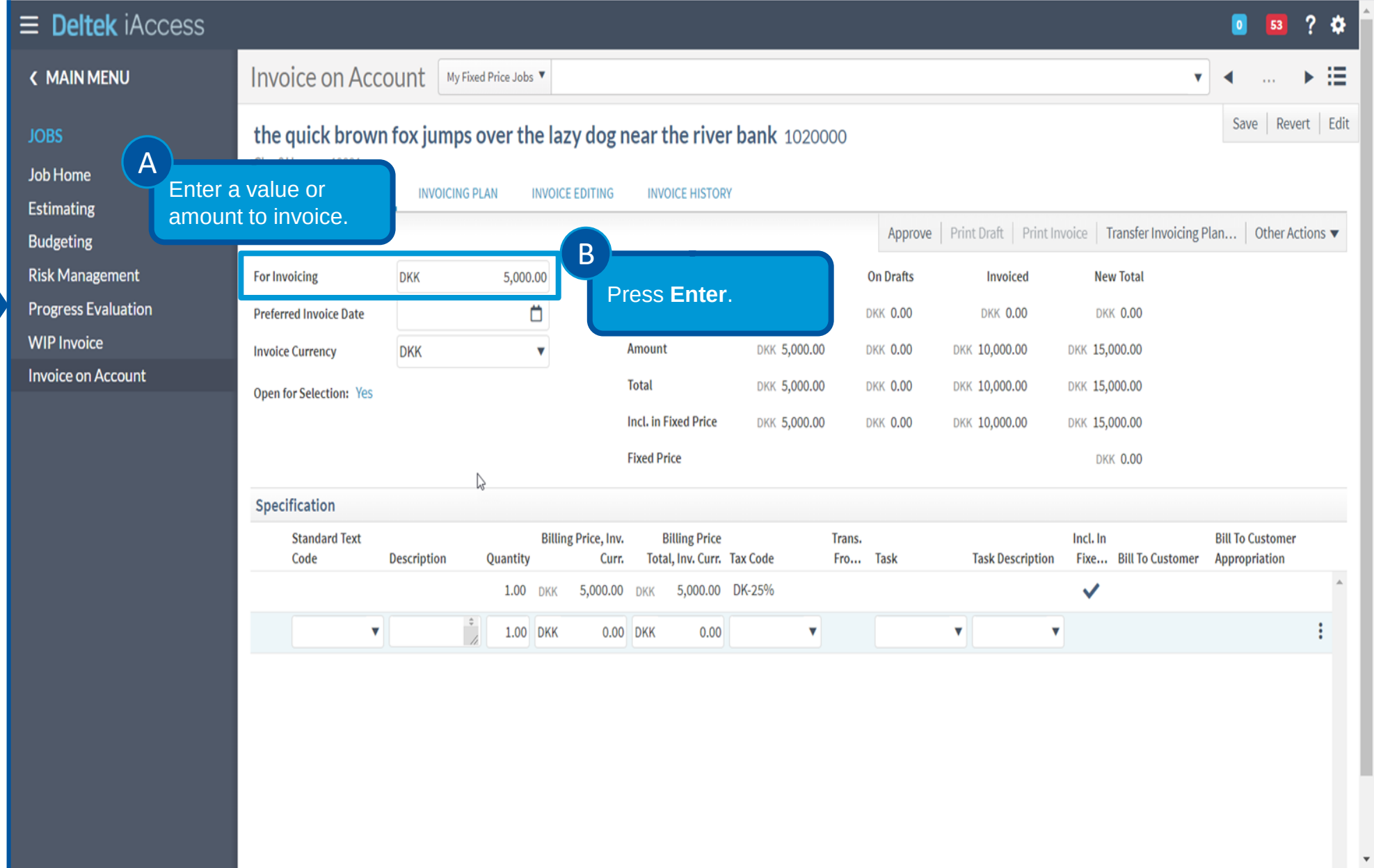
Invoice on Account
Ad-hoc Invoicing

1. Step 1: Locate a job.
2. Step 2: Enter the amount to invoice.
3. Step 3: Review lines under Specification section.
4. Step 4: Approve edits to draft.
5. Step 5: View and print draft invoice.
6. Step 6: Submit draft for approval or print invoice.



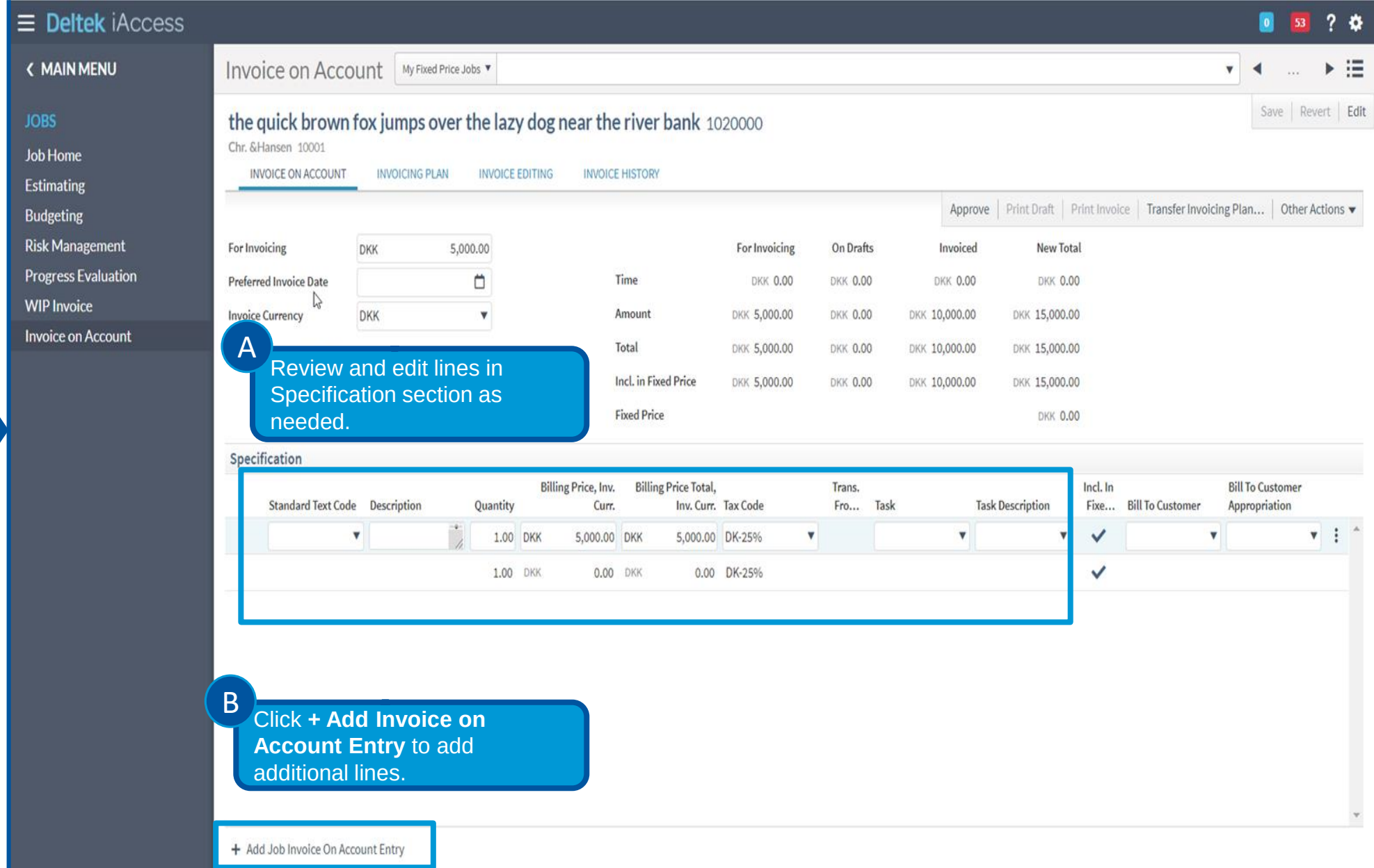
Invoice on Account
Ad-hoc Invoicing

1. Step 1: Locate a job.
2. Step 2: Enter the amount to invoice.
3. Step 3: Review lines under specification section.
4. Step 4: Approve edits to draft.
5. Step 5: View and print draft invoice.
6. Step 6: Submit draft for approval or print invoice.



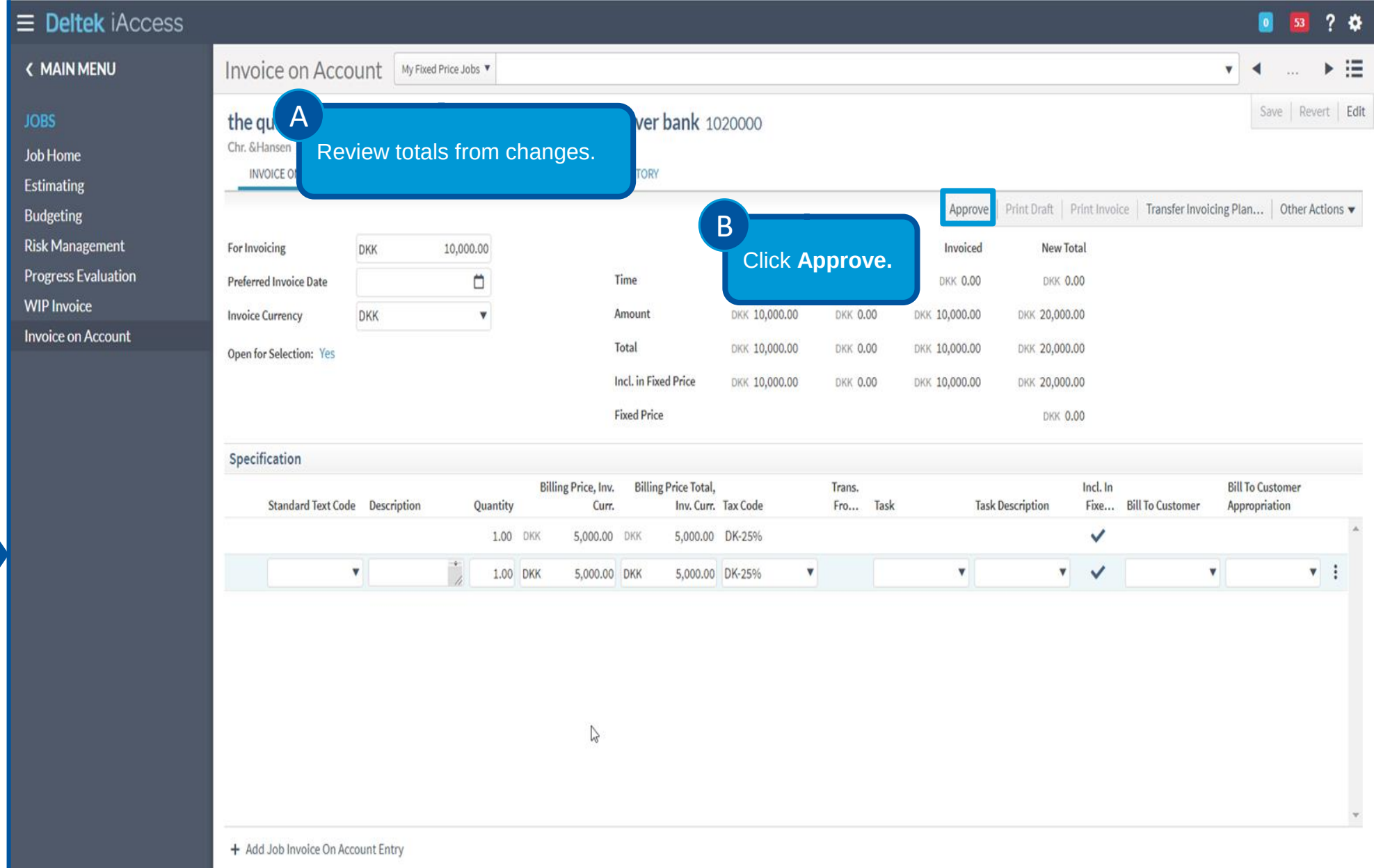
Invoice on Account
Ad-hoc Invoicing

1. Step 1: Locate a job.
2. Step 2: Enter the amount to invoice.
3. Step 3: Review lines under Specification section.
4. Step 4: Approve edits to draft.
5. Step 5: View and print draft invoice.
6. Step 6: Submit draft for approval or print invoice.



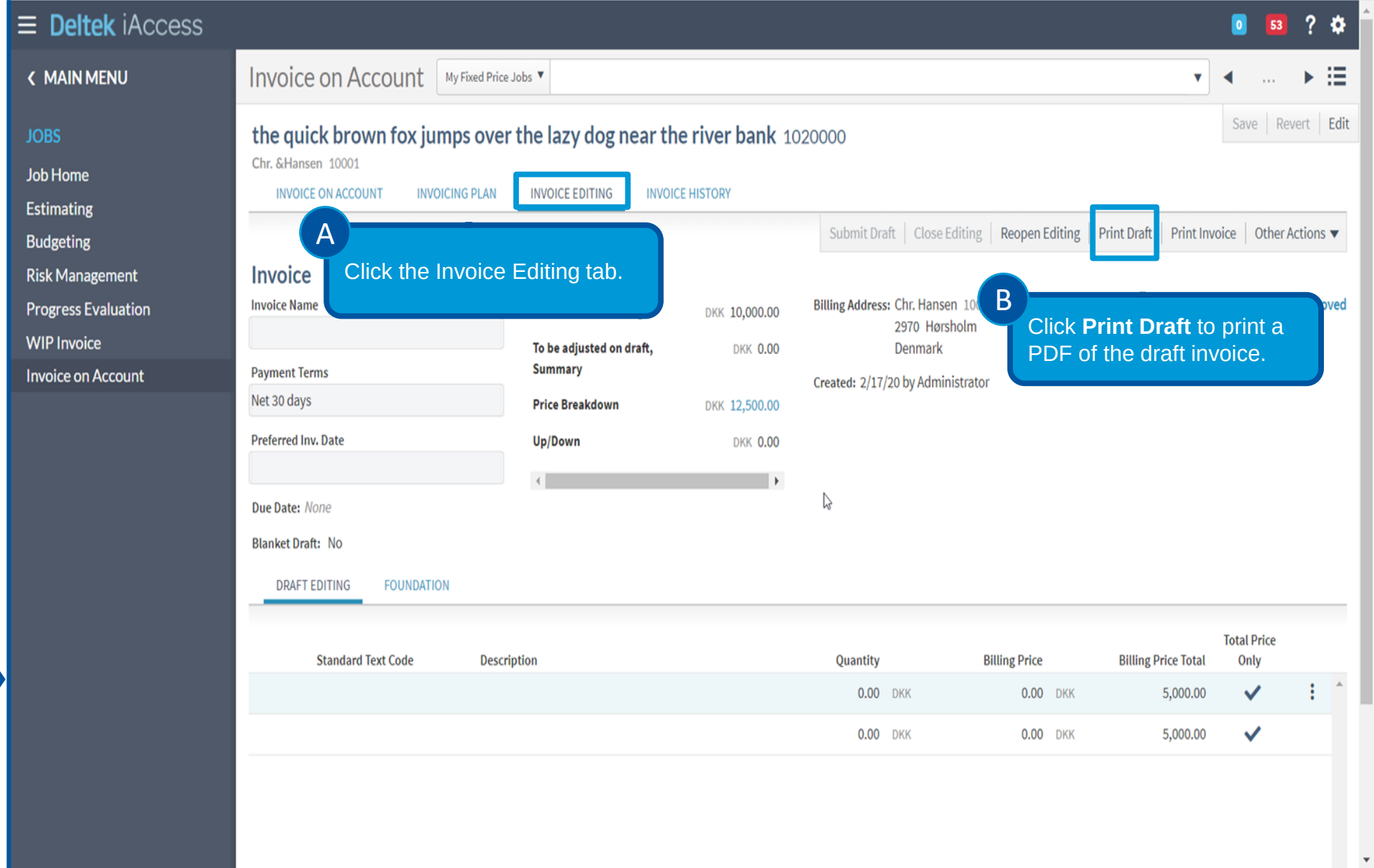
Invoice on Account
Ad-hoc Invoicing

1. Step 1: Locate a job.
2. Step 2: Enter the amount to invoice.
3. Step 3: Review lines under Specification section.
4. **Step 4: Approve edits to draft.**
5. Step 5: View and print draft invoice.
6. Step 6: Submit draft for approval or print invoice.



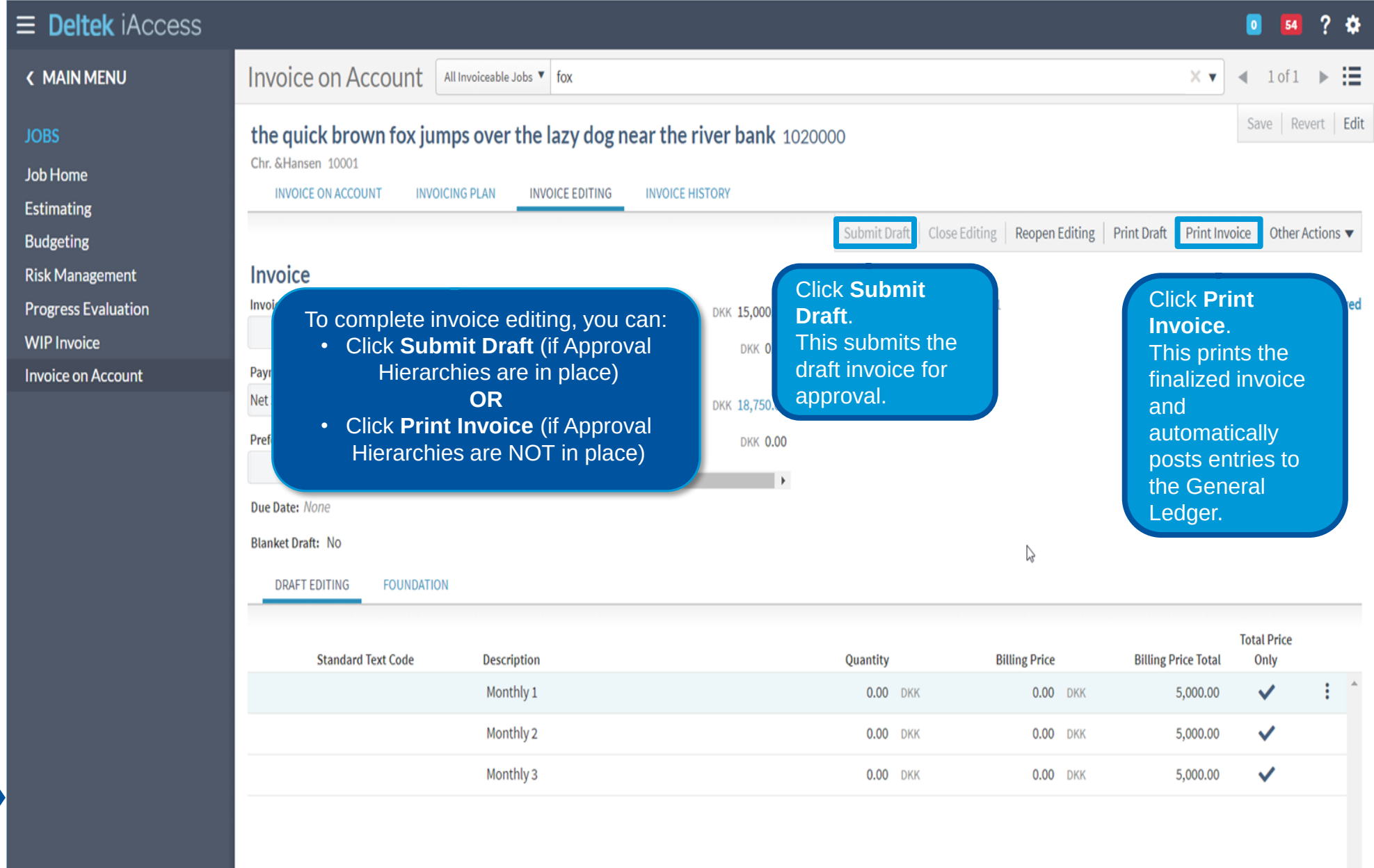
Invoice on Account
Ad-hoc Invoicing

1. Step 1: Locate a job.
2. Step 2: Enter the amount to invoice.
3. Step 3: Review lines under Specification section.
4. Step 4: Approve edits to draft.
5. **Step 5: View and print draft invoice.**
6. Step 6: Submit draft for approval or print invoice.



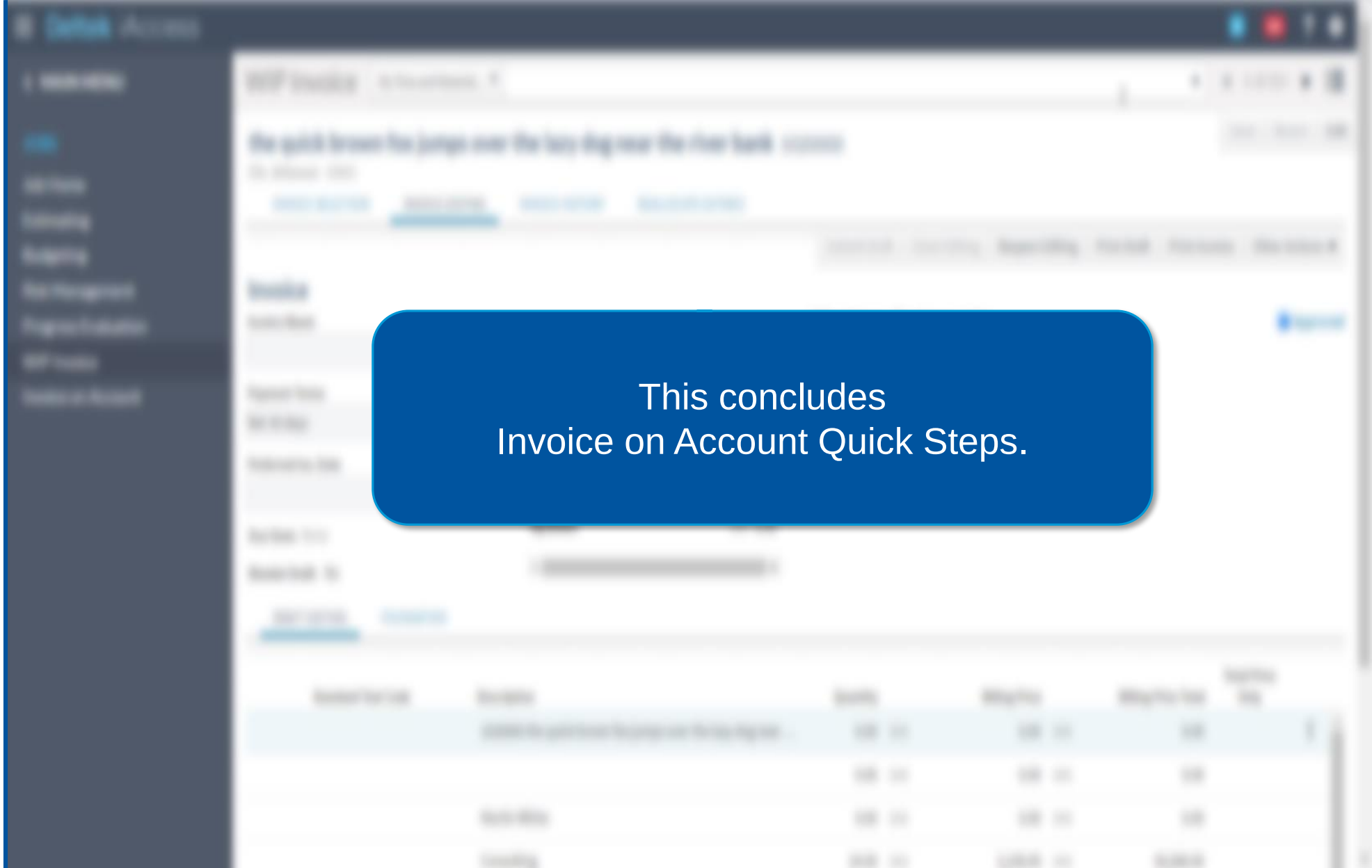
Invoice on Account
Ad-hoc Invoicing

1. Step 1: Locate a job.
2. Step 2: Enter the amount to invoice.
3. Step 3: Review lines under Specification section.
4. Step 4: Approve edits to draft.
5. Step 5: View and print draft invoice.
6. Step 6: Submit draft for approval or print invoice.



Invoice on Account

1. Step 1: Locate a job.
2. Step 2: Edit the invoice.
3. Step 3: Open the detailed view.
4. Step 4: Approve edits to draft.
5. Step 5: View and print draft invoice.
6. Step 6: Submit draft for approval or print invoice.



This concludes
Invoice on Account Quick Steps.