



Deltek

Maconomy Web Client

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Overview of the Maconomy Web Client

The Maconomy web client is designed for streamlined access to time and expense activities, favorites, absence management, employee information, approvals, jobs, job budgets, job risks, progress evaluations, invoices, customer information, purchase orders, and reports.

The user interface is based on Maconomy concepts while featuring a simple, easy-to-use tab design that allows you to click between workspaces. The browser-based application is optimized for in-office as well as remote access use. Look-ups provide quick and easy searches for data and favorites.

The main features are:

- **Recent Places** - Switch between workspaces quickly and easily. This menu item lists the last three workspaces you accessed.
- **Weekly Time Entry** - Register time for the week, specifying a job, task, hours or days, and a description. Use both the Keep and Favorites features for more efficient weekly time entry.
- **Daily Time Entry** - Register time for the day, specifying a customer, job, task, hours or days, and a description. Use both the Keep and Favorites features for more efficient daily time entry.
- **My Plan** - Create and make changes to bookings for tasks assigned to you.
- **Expense Entry** - Create new expense sheets and register expenses by entering the job, task, description, quantity, price and currency. Also, change the exchange rate, or reference a receipt attachment. Attach receipts in batch, and choose to attach individual documents to an expense sheet line. Use the same Favorites feature as in the time sheets to accommodate more efficient expense entry.
- **Mileage Entry** - Create new mileage sheets and register mileage by identifying the job, miles driven, and the From and To locations. The mileage sheet leverages the mileage rules setup in core Maconomy to establish the mileage rate
- **Favorites Management** - Create saved combinations of project and task so you have easy access to them when doing time and expense registration.
- **Absence Management** - Create and submit absence and allowance requests for approval, and view your available and booked absence time.
- **Record and Transaction Approval** - Managers/designated approvers can access and review records/transactions submitted for approval. They can then approve or reject these approval items.
- **Absence and Allowance Approval** - Managers/designated approvers can access and review employee absence and allowance requests. They can then approve or reject these requests.
- **Employees** - Review and update your personal data, or that of other employees. You can also create employee records.
- **Employee Dashboard** - View employee-related key performance indicators.
- **Contact Companies** - Create and maintain information about your contact companies.
- **Opportunities** - Manage your company's sales opportunities.

- **Pipeline** - View opportunity-related charts and key performance indicators.
- **Dashboards** - View job-related charts and key performance indicators.
- **Jobs** - Create and maintain information for jobs or sub-jobs.
- **Budgeting** - Work with job budgets using either the Budgeting or Estimating workspace.
- **Resourcing** - Access the embedded People Planner Resourcing Overview web component.
- **Quotes** - Create, edit, and print job quotes as well as order confirmations.
- **Risk Management** - Manage risks related to a specific job.
- **Progress Evaluation** - Create an overview of how a job is progressing, and see if it is on track in terms of time and cost estimates.
- **WIP Invoice** - Create and maintain WIP invoices for your jobs.
- **Invoice on Account** - Create and maintain on account invoices for your jobs.
- **Draft Invoices** - Work on draft invoices to which you have access.
- **Job Invoices** - Work on job invoices to which you have access.
- **Customers** - Create and maintain customer information.
- **Customer Invoicing** - Combine several jobs on a single invoice for a customer.
- **Draft Invoice Creation** - Create draft invoices for a batch of jobs.
- **Draft Invoice Status** - View and monitor draft invoices in various stages of the approval process.
- **Job Invoicing** - View fully approved draft invoices that are ready for printing.
- **Collections** - Perform credit control-related tasks in the web client.
- **Customer Payments** - Create and post customer payment journals.
- **Purchase Orders** - Create, edit, and submit purchase orders. You can attach documents to purchase orders, and view the status of a purchase order's header/lines.
- **Invoice Allocation** - Allocate vendor invoices to accounts or jobs. You can attach additional documents to invoices.
- **Resource Management** - Access the embedded People Planner Resource Management web component.
- **Viewing Reports** - Access BPM and Analyzer reports from within the web client.
- **Users** - Maintain data about users, their roles, and access privileges.
- **Notifications** - Select a notification to navigate to the needed record/transaction, or the relevant workspace.
- **Online Help** - Access the online help directly from the menu, which opens in a new web page. Find field descriptions, workspace overviews, and step-by-step procedures.

- **Settings** - Manage your personal settings, including establishing the date format, decimal symbol, digit grouping system, and adjusting the time setting to interpret minutes or hours in certain instances on the time sheet.
- **Change Password** - Use the change password feature to change your Maconomy login password.

Getting Started

This section discusses overall navigation and concepts to get you started with the Maconomy web client.

There are several basic features that are used throughout the application.

Starting the Maconomy Web Client and Logging In

The login dialog box displays when you start the web client.

To start the web client and log in:

1. Click the link to launch the application.
2. Enter your user name and password.
3. Click **Log in**.

Note: Maconomy sessions expire after a certain period of inactivity. The default time is 20 minutes, but this is configurable. If your session has timed out, Maconomy redirects you to the login screen and informs you that your session has expired. You have to re-login and navigate back to the workspace where you were working prior to the timeout.

4. If two-factor authentication (2FA) is enabled in the system and you are logging in for the first time, you need to enroll your 2FA device. Perform the following steps:
 - a) Scan the QR code that displays with the 2FA app required by your company.

Note: If you are using an OTP app on your tablet, tap the QR code.
 - b) In the **One-Time Passcode** field, enter the one-time password from your 2FA app.
 - c) Click **Login**.

Your 2FA device is now configured, and you are now logged in successfully to the system. Maconomy also stores a cookie in the system so that you do not have to enter a one-time password until the cookie expires (typically in 30 days' time).
5. If 2FA is enabled in the system and your device is already configured, Maconomy may occasionally require you to enter a new OTP before you can log in. Perform the following steps:
 - a) In the **One-Time Passcode** field, enter the one-time password from your 2FA app.
 - b) Click **Login**.
6. If 2FA is enabled in the system but you need to enroll a new device, perform the following steps:
 - a) Instead of entering a one-time password, click **Reconfigure two-factor authentication device**.

Maconomy sends a reconfigure token to your registered email address.
 - b) In the **Token** field, enter the token from the email.
 - c) Click **Reconfigure**.

- d) Repeat steps 4a-4c.

Multiple Languages

If your company has enabled more than one language, the Maconomy login page features a drop-down list of all these languages.

You can select the language you want to use. For example, if you select **Español**, the login page switches to Spanish, as do all the parts of the user interface (menu, workspaces, and so on) after you log in.

Once logged in, you can still change the language by clicking the gear icon, then clicking **My Settings**.

Change Your Settings

You can customize Maconomy settings, or revert to default settings.

To edit any of your settings:

1. Click the avatar icon found on the top right corner of your application.
2. Click **My Settings**.
The My Settings dialog displays.
3. Edit the fields in the dialog.
4. Click **Ok** to update your settings, or **Cancel** to undo your changes.

My Settings Dialog

The My Settings dialog contains several fields and options:

Formats & Language Tab

Field	Description
Date Format	Select a format from the dropdown.
Decimal Symbol	Select a symbol from the dropdown. Available options are: <ul style="list-style-type: none"> ▪ (,) comma ▪ (.) period
Language	Select a language from the dropdown. The list of available options is dependent on the languages enabled for your company.
Time Format	Select a format from the dropdown.
Digit Grouping Symbol	Select a symbol from the dropdown. Available options are:

Field	Description
	<ul style="list-style-type: none"> ▪ () space ▪ (') apostrophe ▪ (,) comma ▪ (.) period

Miscellaneous Tab

Field	Description
Show field borders	<p>Select this checkbox if you want to display borders around all editable fields.</p> <p>By default, this functionality is disabled.</p>
Enable multiple column sorting	<p>Select this checkbox to enable sorting on multiple columns in tables.</p> <p>By default, this functionality is disabled.</p>
Show recent places	<p>Select this checkbox if you want the menu to list Recent Places, or the last three workspaces you accessed.</p> <p>By default, this functionality is disabled.</p>
Show narrow margins	<p>Select this checkbox if you want narrow side margins on your workspaces.</p> <p>By default, this functionality is disabled.</p>
Show menu search field	<p>Select this checkbox to display the search field on the menu.</p> <p>By default, the search field is hidden.</p>
Interpret hour entry as minutes when above	<p>Use this field if you need to track time in increments of minutes as well as hours.</p> <p>Enter the number which Maconomy should use as the limit at which time switches from being registered as hours to being registered as minutes.</p> <p>For example, if you specify the value 8, any number entered that is equal to or below 8 is interpreted as hours, and any number above 8 is interpreted as minutes. Registered time will then appear as follows:</p> <ul style="list-style-type: none"> ▪ 6 = 6:00 hours ▪ 8 = 8:00 hours ▪ 30 = 0:30 minutes <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>Note: You can also enter time in decimals, so that 0.5 is interpreted as 0:30, or 0.9 is interpreted as 0:54. The Interpret hour entry as minutes when above setting does not affect decimal entries.</p> </div>

Others

Field	Description
Default	Click this button to restore default values for all the fields in the My Settings dialog.

Change Your Password

You can change your password as needed.

To change your password:

1. Click the avatar icon found on the top right corner of your application.
2. Select **Change Password**.
3. Enter your old password.

Note: Passwords are case-sensitive.

4. Enter your new password.
5. Enter the new password again to confirm.
6. Click **OK**.
Maconomy prompts you to confirm the change.

Reset Your Password

You can reset your password from the login screen.

To reset your password:

1. Click **Forgot your password?**.
2. Enter your user name, and click **Reset**.
Maconomy sends a password reset token to your registered e-mail address.
3. Enter the token.
4. In the **New Password** and **Confirm New Password** fields, enter your new password.
5. Click **Log In**.

Display Your Picture

Companies can opt to display pictures of their employees in Maconomy.

Employees use a third-party web service to upload their image and associate that image with their work email address.

If enabled in Maconomy, the application displays the employee image in these places:

- Top right corner of the menu, in place of the avatar icon
- Employee Record workspace

- Employees workspace

Employee Setup to Display Picture

To enable your picture to appear in Maconomy, you must set it up in a third party account, such as Gravatar. After, it will appear automatically in Maconomy.

To set up your Gravatar picture:

Set up your Gravatar account with a profile picture.

<https://en.gravatar.com/>



Note: If you do not have a Gravatar picture, a generic image with your initials displays in Maconomy.





Maconomy Web Client Menu

The menu lists the different workspaces available in the application, and includes buttons for viewing notifications, settings, and the online help.

Click a menu item to navigate to a specific workspace.

The following table describes additional buttons found in the menu:

Button	Description
	Click to hide/display the menu of workspaces. The menu is further subdivided into sections and submenus. Expand these as needed to drill down to a specific workspace.
	<p>Click the My Analyzer Reports icon to display the tabs that list the following Analyzer reports:</p> <p>My Reports tab</p> <p>This tab lists all your saved reports. Click any report to open the relevant report workspace, or click on the row tool to run the report in the background.</p> <p>The following actions are available at the bottom of the tab:</p> <ul style="list-style-type: none">▪ Refresh▪ Import - Click this action to import another user's customized report to your application. <p>Finished Reports tab</p> <p>This tab lists the following:</p> <ul style="list-style-type: none">▪ Currently running reports▪ Failed reports▪ Cancelled reports

Button	Description
	<ul style="list-style-type: none"> Finished report outputs <p>Select a report or report output to view it in the relevant report workspace.</p> <p>The following actions are available at the bottom of the tab:</p> <ul style="list-style-type: none"> Refresh Delete all Filter <p>The following actions are available for each report listed in the dropdown:</p> <ul style="list-style-type: none"> Cancel - This is enabled only for reports that are currently running. Delete Rerun <div> <p>Note: This icon only displays if you have access to at least one of the following: a web Analyzer workspace, a finished Analyzer report, or an Analyzer report listed under Recent Places in the menu.</p> </div>
	Click the speech bubble icon, and Maconomy displays a dropdown that lists your unread messages. Select one to read and/or reply to that message.
	Click the bell icon, and Maconomy displays a dropdown that lists your pending notifications. Select one to take action.
	Click to open the online help system.
	Click to open the system settings options for the user.

Lookups

Many of the time and expense sheet table columns include lookups, which allow you to select from a group of records based on your access rights, system defaults, and the use of validations.

Some of the fields in the time and expense sheet tables enable a quick find and favorites lookup, as follows.

- Search as You Type** - Enter all or part of a number or name in the Job or Task fields, and Maconomy displays a lookup list with potential matching records. Scroll and click to select.

- **Favorites** - Click **Favorites** to display a list of favorites from which to choose.

Info Bubbles

Info bubbles provide more information about the contents of a field, and are available by default in the card/table part of some workspaces.

If you want to display additional info bubbles, or customize an info bubble's format and/or the information it contains, you can customize the layout for the relevant workspace.

If additional information on your workspaces is available, the **More...** link opens the related workspace.

To view a field's info bubble, click once on that field. Note that you can only view info bubbles for fields displayed with blue font.

Using the Keyboard

You can use any of the following keyboard shortcuts when working in Maconomy.

Workspace Shortcuts

Shortcut	Function
CTRL+F (or COMMAND+F on Mac OS)	Press this shortcut to move your cursor to the Search field of a workspace, if applicable. If your cursor is already in the Search field, press this shortcut to toggle between the List and Detail views.
CTRL+E (or COMMAND+E on Mac OS)	Press this shortcut to toggle on edit mode (or to switch back to display mode).
CTRL+S (or COMMAND+S on Mac OS)	Press this shortcut to save your changes.

Search Filter Shortcuts

In the default Detail view, use the following shortcuts for the search filter and the **Search** field.

Shortcut	Function
SHIFT+ALT+DOWN ARROW	If your cursor is in the Search field, press this shortcut to display the drop-down for the search filter options. To close the drop-down, press ESC.
ALT+DOWN ARROW	If your cursor is in the Search field, press this shortcut to display the drop-down for the Search field (if applicable). To close the drop-down, press ESC.

Shortcut	Function
DOWN ARROW / UP ARROW	Press either arrow key to select a different value from the displayed drop-down. To choose the selected value, press ENTER.

List View Filter Row Shortcuts

When in list view, use the following shortcuts for any of the fields on the filter row.

Shortcut	Function
SHIFT+ALT+DOWN ARROW	If your cursor is in a filter row field, press this shortcut to display the drop-down for operator options. To close the drop-down, press ESC.
ALT+DOWN ARROW	If your cursor is in a filter row field, press this shortcut to display the drop-down for that field (if applicable). To close the drop-down, press ESC.
DOWN ARROW / UP ARROW	Press either arrow key to select a different value from the displayed drop-down. To choose the selected value, press ENTER.

Table Shortcuts

Use the following shortcuts when working in tables.

Shortcut	Function
DOWN ARROW / UP ARROW	Press either arrow key to select a different table line.
DOWN ARROW	After adding a table line, press this key to save that line and add another line.
UP ARROW	If you added a table line but have not filled out any of its fields, press this key to quickly delete the line.
ALT+RIGHT ARROW	In tree tables, select a parent line, then press this shortcut to expand that parent line and display its sub-lines.
ALT+LEFT ARROW	In tree tables, select a parent line, then press this shortcut to collapse that parent line and hide its sub-lines.

Field Shortcuts

Use the following shortcuts when filling out fields.

Shortcut	Function
CTRL+G (or COMMAND+G on Mac OS)	Press this shortcut to open the advanced search for a field (if applicable).
ENTER	Press this key to save your changes.
ESC	Press this key to undo your unsaved edit to a field value.
ALT+DOWN ARROW	Press this shortcut to display the drop-down for a field (if applicable). To close the drop-down, press ESC.
DOWN ARROW / UP ARROW	Press either arrow key to select a different value from the displayed drop-down. To choose the selected value, press ENTER.

Filter and Sort Table Columns

You can filter and sort column information in the table part of some workspaces.

Filter Table Columns

Use the Filter feature to only display rows that satisfy the criteria set in the filter row of a table column.

To filter the information for a column, click the Filter icon to display the filter row in the table and then enter the filter criteria for the column.

Sort Table Columns

To sort column information, click the column header. You can sort column information in ascending and descending order.

When you sort the rows in a tree table by clicking the column header, Maconomy sorts the table lines while maintaining the hierarchical structure of parent and sub-lines. That is, sub-lines are sorted while remaining under their parent line.

Sorting the rows in a tree table does not change how the add/insert line actions behave. If you add a line, Maconomy inserts the new line at the bottom of the table. If you insert a line, Maconomy inserts the new line above the currently selected line; the inserted line follows the hierarchy and is displayed on the same level as the currently selected line.

Customize Table Columns

You can customize columns in all tables and list views. Your user preferences are saved on the server, and are available to you even if you switch browsers and/or devices.

Specifically, you can:

- Resize columns to display contents better, or optimize screen space.
- Rearrange columns directly on the table, or using the Customize Columns window.
- Add or remove columns using the window.
- Revert to default settings for a table or list view.

All tables and list views include a gear icon that you click to open the Customize Columns window.

Resize and Rearrange Columns

You can resize table columns to display information better. You can also customize the arrangement of columns, either in the table itself or by using the Customize Columns window.

To resize and rearrange columns:

1. Go to the table or list view you want to customize.
2. To resize columns:
 - a) Hover your pointer on the margin of a column name until you see the icon for adjusting width.
 - b) Click and drag the margin to your preferred width, then release the mouse button.
3. To rearrange columns directly in the table:
 - a) Click and drag the column name to your preferred location, then release the mouse button.
4. To rearrange columns using the Customize Columns window:
 - a) On the row of column names, click the gear icon to open the Customize Columns window.
 - b) In the Visible Columns list, click and drag the column name to your preferred location on the list.
 - c) Click **Apply** to save your changes and close the window.

Add or Remove Columns

Use the Customize Columns window to add or remove columns from any table.

To add or remove table columns:

1. Go to the table or list view you want to customize.
2. On the row of column names, click the gear icon to open the Customize Columns window.
3. To add columns:
 - a) From the Available Columns list, hover your pointer over the end of a column name until you see the **Add Column** arrow icon.
 - b) Click the **Add Column** arrow icon to move that column name to the Visible Columns list.
 - c) If needed, rearrange the columns on the Visible Columns list as detailed in the previous procedure.
4. To remove columns:

- a) From the Visible Columns list, hover your pointer over the end of a column name until you see the **X** or **Remove Column** icon.
 - b) Click the **Remove Column** icon to move that column name to the Available Columns list.
5. Click **Apply** to save your changes and close the window.

Restore Default Column Settings

You can use the Customize Columns window to undo all your customizations for a specific table.

To restore default column settings:

1. Go to the table or list view you want to customize.
2. On the row of column names, click the gear icon to open the Customize Columns window.
3. Click the **Restore Defaults** action.
4. Click **Apply** to save your changes and close the window.

Tree Tables

Tree tables are hierarchical tables with parent lines that have sub-lines nested underneath them. Maconomy is able to display such tables in several workspaces. Arrow icons on the leftmost table column allow you to expand and collapse parent lines as needed.

This functionality allows Maconomy to accurately display lines for job budgets that utilize a work breakdown structure (WBS).

Note: While the tree tables functionality is enabled by default in select workspaces, it is not available and cannot be made available in read-only tables (such as those in the Approval Center workspace), filters-as-tables (such as those in the Absence workspace), and list views.

Actions in Tree Tables

Tree tables feature an action toolbar that allows users to move lines up/down, and outdent/indent them.

One limitation is that users cannot easily move a subline from one parent line to another. Drag-and-drop functionality is not supported. You will have to use the four actions in combination to move a subline under a different parent line.

The toolbar contains the following actions:

Button	Description
↑ Move up	Click this action to move the current line above the previous line in the table.

Button	Description
	<p>When you perform this action on a parent line, Maconomy moves the related sublines along with that parent line. The parent and its sublines also skip over any intervening sublines.</p> <p>When you perform this action on a sum line with no sublines, that sum line also skips over any intervening sublines.</p>
↓ Move down	<p>Click this action to move the current line below the next line in the table.</p> <p>When you perform this action on a parent line, Maconomy moves the related sublines along with that parent line. The parent and its sublines also skip over any intervening sublines.</p> <p>When you perform this action on a sum line with no sublines, that sum line also skips over any intervening sublines.</p>
← Outdent	<p>Click this action to outdent the current subline, and remove it from under its parent line.</p> <p>Clicking this action takes the subline out of its current hierarchy, and converts it into a normal line.</p>
→ Indent	<p>Click this action to indent the current line, and make it a subline of the parent line immediately above it.</p>

Actions in Non-Hierarchical Tables

The following actions are found in most of the non-hierarchical tables in Maconomy:

Button	Description
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.

Exporting Tables to Spreadsheets

Users can export table data to spreadsheets using the **Export to Excel** icon.

Specifically, you can:


- Go into any table or list view and export the data to a spreadsheet (.xlsx or .csv).
- Export filtered rows as is, whether you are exporting from a list view or while using inline filters.
- Export only visible columns, in the order that they appear in your application.

Note: Hierarchical line information from tree tables are not reflected in the exported spreadsheet.

Export Table to a Spreadsheet

You can export table data to a spreadsheet, with the option to filter the table rows before the actual export.

To export a table to a spreadsheet:

1. Go to the table or list view that you want to export.
2. If you only want to export specific rows, filter the table rows before performing the export.
3. Click the  **Export to Excel** icon found at the top right corner of the table or list view.

The Export dialog displays.

4. In the **File format** field, select a format from the dropdown list.
5. In the **Filename** field, specify a filename for the exported spreadsheet. You can opt for the default filename or specify one of your own.
6. If you are exporting a list view: in the **Number of rows to export** field, specify the number of rows you want to include in the exported spreadsheet.

Note:

- By default, the **Number of rows to export** field specifies the number of rows currently loaded locally. If you do not edit this value, Maconomy will export only those rows.
- The maximum number of rows you can export is 10,000.

7. Click **Ok**.
Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.

Note: If you exported a list view and specified more rows than the number loaded locally, Maconomy will perform a reload before the actual export.

Conversations

Employees can engage in conversations about specific records from within Maconomy workspaces.

By default, this is available in the following workspaces:

- WIP Invoice
- Invoice on Account
- Draft Invoices
- Customer Invoicing
- Collections
- Invoice Allocation

If added to any other workspace as a customization, the functionality works the same as described here.

Any workspace with conversations enabled includes a dedicated Messages pane on their right-hand side.

Subscribing/Unsubscribing to a Conversation

Adding a message to any conversation automatically subscribes you to that conversation, enabling you to receive notifications for messages added to it. Click **Unsubscribe** if you wish to stop receiving notifications for a specific conversation.

Note: You can also unsubscribe using the available action in the Message Center. See the next section for details.

If you want to add participants/subscribe others to a specific conversation, use either of two methods:

- Click the **+Add Participant** action, and select a user from the drop-down list. This action is only available if the conversation already contains messages.
- In the input area, mention a specific person by typing **@[name]** as part of your message. Mentioning a person automatically subscribes them to the conversation.

Notes:

- If you delete a message where you mention another user, Maconomy deletes the message but retains the user as a subscriber to the conversation.
- You cannot unsubscribe other users from a conversation, so be careful when adding participants.

The Message Center

The top right corner of the menu includes a Notifications icon for unread messages. Click this speech bubble icon to expand the Message Center, which lists your unread messages.

From within this Message Center, you can perform any of the following actions:

- Click a record on the list to go directly to the conversation for that record. Maconomy will direct you to the end of the conversation thread, or to the first unread message in the thread.
- Hover your pointer at the end of a record line, then click the vertical ellipsis to expand the actions drop-down list. You can then choose to unsubscribe from the conversation for that specific record, or mark all your unread messages for that conversation/record as read.
- Use the action at the bottom of the Message Center to mark all your unread messages for all conversations as read.
- Open the Conversation Center workspace.

The Conversation Center

Use the Conversation Center to view, tag, and respond to any conversation in which you are a participant. Click the speech bubble icon, then the Conversation Center link to access this workspace.

From within this Conversation Center, you can perform any of the following actions:

- Get an overview of conversations and messages, and search against these lists.
- View conversations to which they are subscribed, even if they do not have access to the record or transaction associated with that conversation.
- Pin, mute, or unsubscribe from conversations.

Note that this workspace can only list up to 5,000 messages per conversation, with the latest message at the top. This is a general limitation of Maconomy.


Fields

Field	Description
Search	<p>Enter any search term here to look for a specific message in any conversation in which you are subscribed.</p> <p>Maconomy will list all the messages that fit your search criterion on the left-hand pane, and rename that pane "Messages". All unread messages are marked with a blue dot.</p> <p>If you click a message, Maconomy then displays the relevant conversation on the right-hand pane with the message you selected briefly highlighted to help you spot it.</p> <p>If you clear this field, the left-hand pane reverts to being labeled "Conversations".</p>

Conversations Pane

This pane lists the conversations in which you are subscribed, depending on which filter is currently active. It lists your pinned conversations (if any) first, arranged according to which conversation contains the most recent message. It then lists all your other conversations, arranged according to which conversation contains the most recent message. Both these lists are collapsible.

Field	Description
Show	<p>Select an option from the dropdown list to filter the conversations listed in the pane. Options are:</p> <ul style="list-style-type: none"> ■ Default - Lists all your unmuted conversations. This is the field's default value. ■ Unread - Lists your unread conversations only. ■ Muted - Lists your muted conversations only. ■ All - Lists all your conversations, including those that you muted.

Field	Description
	<p>If you hover your pointer over the rightmost end of a conversation line, this vertical ellipsis displays.</p> <p>Click this icon to view the actions you can apply to that conversation line. Available actions are:</p> <ul style="list-style-type: none"> ▪ Pin (or Unpin, if you already pinned the conversation) ▪ Mute (or Unmute, if you already muted the conversation) - When you click this action, you will no longer receive notifications about the conversation unless you are mentioned in a message. ▪ Unsubscribe <p>These options are employee-specific. Any option you choose will apply to you only.</p>

Messages Pane

After you select a conversation on the left-hand pane, this right-hand pane lists all the messages in that conversation.

Messages Area


This contains all the messages in the conversation you selected. In this area, you can:


- Mark specific messages as unread. Hover your pointer at the end of the message line, then click the vertical ellipsis that appears. Click **Mark as unread**.
- Delete the last message you sent, within 15 minutes of sending it. Just click the **Delete** icon to the right of that message.
- Go directly to the record or transaction relevant to the current conversation. Hover your pointer over the conversation title until you see an arrow at the end of the title. Click that arrow to navigate to the relevant record or transaction.

Input Area

This is available at the bottom of the pane. You can type your message here, then press ENTER or click the paper plane icon to send. Each message has a 255-character limit.

Pane Actions

Action	Description
+ Add Participant	Click this action to include a user to the current conversation. The selected user will be subscribed automatically to the conversation.
Conversation Title	Click the conversation title to navigate to the relevant workspace for the open conversation.
	<p>Click the vertical ellipsis icon on the top right corner of the pane to perform any of the following actions:</p> <ul style="list-style-type: none"> ▪ Pin (or Unpin, if you already pinned the conversation)

Action	Description
	<ul style="list-style-type: none"> ▪ Mute (or Unmute, if you already muted the conversation) ▪ Unsubscribe
	Click the paper plane icon to send a message.

Reply to a Conversation Using the Conversation Center

You can use the Conversation Center to reply to messages.

To reply to a conversation:

1. Click the speech bubble icon on the top right corner of the menu.
2. Click **Conversation Center**.
3. Search for a message on the **Search** field, or select a message from your pinned or recent conversations.
4. In the input area, type your reply. If needed, mention a specific person by typing **@[name]** as part of the text.
5. Click the paper plane icon or press ENTER to send the message.

Reports

Analyzer

Users can utilize the Analyzer report templates to customize layouts from which they can generate report outputs that fit their specific work requirement. Currently, Maconomy has two job Analyzer workspaces. More report workspaces will come in later versions.

BPM

BPM reports are available in various standalone workspaces in Maconomy. This enables you to easily access reports used by your company. You can configure your application to work with Silent Sign In so that users can automatically log in to BPM.

To customize the reports available to your users from within Maconomy, you can remove any of the default report workspaces, add other standard reports, or create custom reports and add these to the menu.

Note: Viewing BPM reports with Chrome is not officially supported for iPads on iOS 11 and 12. You can view the reports with the supported browsers listed in the [Deltek Product Support Compatibility Matrix](#).

When using Safari 13.0.4 (or earlier), the report workspaces do not automatically display the embedded BPM reports. To resolve this issue, go to **Safari » Preferences » Privacy** and disable **Prevent cross-site tracking**.

Self Service

This section covers conceptual information, procedures, and field descriptions for all self-service workspaces.

Time Sheets


The Time Sheet workspaces allow you to enter work hours on time sheets and submit them for processing.

Timesheet Concepts

Use time sheets to enter:

- Job, Task, Description, and Hours for each charge on a time sheet.
- Hours for each day in a period.

When you record hours worked, you can:

- Enter or edit time sheet data on an open time sheet.
- Click  to view time sheet totals.
- Add any number of time sheet rows to record hours worked.
- Enter a description for time entered.
- Submit a time sheet for approval.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notifications are included:

- **Submit Time Sheet** - Appears for the user to indicate the pending submission of time sheets. This notification points to the relevant time sheet.
- **Submit Daily Time Sheet** - Appears for the user to indicate the pending submission of daily time sheets. This notification points to the relevant daily time sheet.
- **Rejected Time Sheet** - Appears for the user to indicate that a submitted time sheet has been rejected. This notification points to the relevant time sheet.
- **Rejected Time Sheet Lines** - Appears for the user to indicate that a submitted time sheet line has been rejected. This notification points to the relevant time sheet, with the rejected line highlighted.

- **Daily Time Sheets not Created** - Appears for the user to indicate a time sheet is not submitted for the day. By default, all missing time sheets within the last two months are included. This notification points to the Daily Time Sheets workspace.
- **Weekly Time Sheets not Created** - Appears for the user to indicate a time sheet is not submitted for the week. By default, all missing time sheets within the last two months are included. This notification points to the Weekly Time Sheets workspace.

Note: Approvals/rejections in Maconomy rely on the approval hierarchies set up in your company's core Maconomy installation.

Timesheet Workspaces

Use the daily and weekly Time Sheet workspaces to enter personal time sheet information, which may include job, task, time, and other values for each labor charge on a time sheet.

Each time sheet workspace displays fields and a table. The fields list the general time sheet data, including period, number of hours, status information, totals, and related comments, while the table displays specific labor charge and time details.

Weekly Time Sheet Fields

This section describes the fields and actions on the Weekly Time Sheet workspace.

Card Part Fields

Field	Description
Employee	This field displays the employee name and number related to this time sheet. If you have the necessary permissions, this field displays as a drop-down list and you can select the name of other employees to view/edit their time sheets.
Time Sheet Status	<p>The time sheet status displays as follows:</p> <ul style="list-style-type: none"> ▪ Due - This time sheet is in the process of being completed and has not been submitted. You can enter time sheet data and edit time sheet data. ▪ Submitted - The time sheet is submitted for processing, but is not approved. You can open the time sheet, but you cannot enter or edit time sheet data unless your security access allows you to resubmit time sheets. ▪ Approved - The Header portion is approved but that certain lines may need approval from the project manager. ▪ Fully Approved - The time sheet is approved and is ready for posting. ▪ Rejected - The time sheet can have this status if one or more of the lines have been rejected by the approver.

Card Part Actions








Button	Description
Date Range Display	Click this link to access the calendar, then select the appropriate week to enter time sheet information. You can also use the arrow buttons on either side of the link to navigate to a different week.
	Click this icon to refresh data in the current workspace.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Create	Click this action button to create a time sheet.
Submit	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.
Other Actions	<p>In the Weekly Time Sheets workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Reopen - Select this action to reopen a closed/approved time sheet. ▪ Print ▪ Copy From - Select this action to copy lines from a weekly time sheet, and add these lines to the weekly time sheet you are currently working on.



Table Fields

Field	Description
Keep	Select this field to automatically copy this line from the previous period at the creation of time sheets. New lines created will inherit this status, which means that they will automatically be copied to all new time sheets until you remove the mark from this field on the lines in question.
Favorite	<p>In this field, you can select a favorite.</p> <div> <p>Note: Choosing a favorite may change other details specified for the time sheet line, such as the job or task.</p> </div>
Job No.	Use this or the Job Name field to specify the job for which you are charging time. Filling out one field will auto-populate the other.

Field	Description
Job Name	Use this or the Job No. field to specify the job for which you are charging time. Filling out one field will auto-populate the other.
Task	This field is available if the phase you selected has associated tasks.
Mon - Sun	Use these fields to specify the hours worked per day.
Total	This field displays the total hours for this line.
Status	This field displays the time sheet line's approval status.

Table Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For time sheet lines, choose from the following actions:</p> <ul style="list-style-type: none"> ■ Insert Time Sheet Line ■ Delete Time Sheet Line ■ Create favorite - Select to save the current line as a favorite. Afterwards, this line appears in the Favorites workspace.
+ Add Time Sheet Line	Click this action to add another entry line to the bottom of the time sheet.
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	<p>Click to maximize the table view.</p> <p>Click to restore the default display size of the table.</p>
	Click to open the Customize Columns window.

Button	Description
 	Click Collapse / Expand to toggle the expand / hide detail feature in weekly time sheets.

Summary Lines

The lower section of the Time Sheet form displays time sheet totals for the whole time sheet.

Field	Description
Total	This field displays the combined total hours for the week.
Regular	<p>This field displays the difference between the total number of hours entered and registered overtime for the day.</p> <p>Note: This field is shown only when the Exclude Overtime from Balance check box is selected on the employee's record.</p>
Fixed	The fixed number of hours as defined by your administrator on your employee card. This may just be for reference, or a separate setting may also require you enter a minimum of the fixed hours before you submit the time sheet.
Balance	The difference between the number of hours you entered and the Fixed number that are required of you per your employee card.
Overtime	<p>This field shows the calculated overtime for the day.</p> <p>This is calculated as the sum of all time sheet lines that have a selected Overtime Spec. where the Include in Regular Time field is deselected.</p> <p>Note: This field is shown only when the Exclude Overtime from Balance check box is selected on the employee's record.</p>
Check-in Time	This field shows the employee's total check-in time registered for the current week.
Check-in Balance	This field shows the employee's total remaining balance for the current week.
Invoiceable %	This field displays the total hours entered in the table that are against billable activities, represented as a percentage.

Check-in Tab

This section describes the fields and actions on the Check-in tab of the Weekly Time Sheets workspace.

Tab Fields

Field	Description
Total Check-in Time, Monday-Sunday	This field displays the total check-in time registered for each day.
Total Check-in Time, Week	This field displays the total check-in time registered for the week.
Total Check-in Balance, Monday-Sunday	This field displays the remaining check-in balance for each day.
Total Check-in Balance, Week	This field displays the total check-in balance for the week.







Monday-Sunday Sub-Tabs

This section describes the fields and actions on the Monday-Sunday sub-tabs under the Check-in tab of the Weekly Time Sheets workspace.

Sub-Tab Fields

Field	Description
Checked In	Enter a check-in time. If you enter a very precise time that includes the seconds, such as 11:15:25, Maconomy automatically removes the seconds and registers the check-in time as 11:15:00.
Checked Out	Enter a check-out time. If you enter a very precise time that includes the seconds, such as 11:15:25, Maconomy automatically removes the seconds and registers the check-out time as 11:15:00.
Minutes Checked In	This field displays the duration of the entry in minutes.
Hours Checked In	This field displays the duration of the entry in hours.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For check-in entry lines, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Delete Daily Check-in Entry ▪ Revert
+ Add Daily Check-in Entry	Click this action to add another entry line to the bottom of the time sheet.
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	<p>Click to maximize the table view.</p> <p>Click to restore the default display size of the table.</p>
	Click to open the Customize Columns window.

Daily Time Sheet Fields

This section describes the daily time sheet fields and actions.

Card Part Fields

Field	Description
Employee	<p>This field displays the employee name and number related to this time sheet.</p> <p>If you have the necessary permissions, this field displays as a drop-down list and you can select the name of other employees to view/edit their time sheets.</p>
Time Sheet Status	<p>The time sheet status displays as follows:</p> <ul style="list-style-type: none"> ▪ Due - This time sheet is in the process of being completed and has not been submitted. You can enter time sheet data and edit time sheet data.

Field	Description
	<ul style="list-style-type: none"> ▪ Submitted - The time sheet is submitted for processing, but is not approved. You can open the time sheet, but you cannot enter or edit time sheet data unless your security access allows you to resubmit time sheets. ▪ Approved - The Header portion is approved but that certain lines may need approval from the project manager. ▪ Fully Approved - The time sheet is approved and is ready for posting. ▪ Rejected - The time sheet can have this status if one or more of the lines have been rejected by the approver.

Card Part Actions










Button	Description
Date Range Display	Click this link to access the calendar, then select the appropriate day to enter time sheet information. You can also use the arrow buttons on either side of the link to navigate to a different day.
	Click this icon to refresh data in the current workspace.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Create	Click this action button to create a time sheet.
Submit	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.
Other Actions	<p>In the Daily Time Sheets workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Reopen - Select this action to reopen a closed/approved time sheet. ▪ Print ▪ Copy From - Select this action to copy lines from a daily time sheet, and add these lines to the daily time sheet you are currently working on.

Table Fields

Field	Description
Keep	Select this field to automatically copy this line from the previous period at the creation of time sheets. New lines created will inherit this status, which means that they will automatically be copied to all new time sheets until you remove the mark from this field on the lines in question.
Favorite	<p>In this field, you can select a favorite.</p> <div> <p>Note: Choosing a favorite may change other details specified for the time sheet line, such as the job or task.</p> </div>
Customer	Use this field to specify the customer for whom you are charging time.
Job No.	<p>Use this or the Job Name field to specify the job for which you are charging time.</p> <p>Filling out one field will auto-populate the other.</p>
Job Name	<p>Use this or the Job No. field to specify the job for which you are charging time.</p> <p>Filling out one field will auto-populate the other.</p>
Task	This field is available if the phase you selected has associated tasks.
Daily Description	Enter a description of the task specified on the current line.
Hours	Enter the hours of work spent on this task for this day.
Status	This field displays the time sheet line's approval status.

Table Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For time sheet lines, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Time Sheet Line ▪ Delete Time Sheet Line ▪ Create favorite - Select to save the current line as a favorite. Afterwards, this line appears in the Favorites workspace.
+ Add Time Sheet Line	Click this action to add another entry line to the bottom of the time sheet.

Button	Description
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.
 	Click Collapse / Expand to toggle the expand / hide detail feature in daily time sheets.

Summary Lines

The lower section of the Time Sheet form displays time sheet totals for the whole time sheet.

Field	Description
Total	This field displays the total hours for each day as well as the total hours for the week.
Regular	<p>This field displays the difference between the total number of hours entered and registered overtime for the day.</p> <div> <p>Note: This field is shown only when the Exclude Overtime from Balance check box is selected on the employee's record.</p> </div>
Fixed	The fixed number of hours as defined by your administrator on your employee card. This may just be for reference, or a separate setting may also require you enter a minimum of the fixed hours before you submit the time sheet.
Balance	The difference between the number of hours you entered and the Fixed number that are required of you per your employee card.
Overtime	<p>This field shows the calculated overtime for the day.</p> <p>This is calculated as the sum of all time sheet lines that have a selected Overtime Spec. where the Include in Regular Time field is deselected.</p>

Field	Description
	<div> Note: This field is shown only when the Exclude Overtime from Balance check box is selected on the employee's record. </div>
Check-in Time	This field displays the employee's total check-in time registered for the current day.
Check-in Balance	This field displays the employee's total remaining balance for the current day
Invoiceable %	This field displays the total hours entered in the table that are against billable activities, represented as a percentage.


Check-in Tab






This section describes the fields and actions on the Check-in tab of the Daily Time Sheets workspace.

Tab Fields

Field	Description
Total, Check-in Time	This field displays the total check-in time registered for the current day.
Total, Check-in Balance	This field displays the total remaining balance for the current day.
Checked In	<p>Enter a check-in time.</p> <p>If you enter a very precise time that includes the seconds, such as 11:15:25, Maconomy automatically removes the seconds and registers the check-in time as 11:15:00.</p>
Checked Out	<p>Enter a check-out time.</p> <p>If you enter a very precise time that includes the seconds, such as 11:15:25, Maconomy automatically removes the seconds and registers the check-out time as 11:15:00.</p>
Minutes Checked In	This field displays the duration of the entry in minutes.
Hours Checked In	This field displays the duration of the entry in hours.

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record.

Button	Description
	For check-in entry lines, choose from the following actions: <ul style="list-style-type: none"> Delete Daily Check-in Entry Revert
+ Add Daily Check-in Entry	Click this action to add another entry line to the bottom of the time sheet.
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Time Sheet Procedures

This section describes all the steps you need to work with time sheets.

Use daily or weekly time sheets to do the following:

Enter Data in a Time Sheet

You can enter time on jobs in a weekly or daily time sheet.

To enter data on a time sheet:

- Go to the **Weekly Time Sheets** or **Daily Time Sheets** workspace.
- Select the time sheet and click on a row to enter your hours.
- To add a time sheet line, you can do one of the following:
 - On the current time sheet line, click the **View Details** icon, and then click **Insert Time Sheet Line**.
Maconomy inserts a blank line under the line currently selected.
 - Click **+ Add Time Sheet Line** to add a line to the bottom of the time sheet.
- Fill out the fields on the new time sheet line as needed.

5. To enter time on a different time sheet line:
 - a) Click the **Date Range Display** link at the top of the workspace.
 - b) In the calendar widget that opens, select the date or week for which you want to register time.
Maconomy then displays the time sheet you selected.
 - c) Enter time sheet lines as needed
6. Click **Save**.

Copy from a Weekly Time Sheet

You can create additional lines on a weekly time sheet by using the **Copy From** action. This action copies lines from the weekly time sheet you specify, and adds the lines to the time sheet you are currently editing. While task and job information are carried over, registered time is reset to zero. Lines that pertain to blocked activities or blocked/closed jobs are not copied.

To copy lines from a weekly time sheet:

1. Go to **Weekly Time Sheets**.
2. Select the weekly time sheet you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**.
The Copy Time Sheet wizard displays.
4. To select the weekly time sheet from which you want to copy lines, you can either specify the week's start date or the week number.
By default, the fields in the wizard specify the previous week, but you can easily change the values.
5. Click **Copy Time Sheet**.
Maconomy adds the copied lines to the current weekly time sheet and automatically saves your changes.

Copy from a Daily Time Sheet

You can copy lines from an existing daily time sheet.

To copy from a daily time sheet:

1. Go to **Daily Time Sheets**.
2. Select the daily time sheet you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**.
The Copy Time Sheet wizard displays.
4. Specify the date of the daily time sheet from which you want to copy lines.
5. Click **Copy Time Sheet**.
Maconomy adds the copied lines to the current time sheet and automatically saves your changes.

Edit a Time Sheet

You can edit hours for time sheets that are not yet submitted.


To edit a time sheet:

1. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. Select the time sheet you would like to edit, and double-click the line. The line displays as editable text.
3. Edit the hours field as needed.
4. Exit the panel when done. Your information auto-saves as you type.


View Time Sheet Totals

You can change the time sheet view to display totals for the time sheet hours.

To view time sheet totals:

1. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. Open the time sheet panel and select a time sheet.
3. Click  to expand the time sheet totals that display.

The following totals display:

- **Fixed** - The fixed number of hours as defined by your administrator on your employee card. This may just be for reference, or a separate setting may also require you enter a minimum of the fixed hours before you submit the time sheet.
 - **Balance** - The difference between the number of hours you entered and the **Fixed** number that are required of you per your employee card.
 - **Invoiceable** - The total hours entered in the table that are against billable activities.
 - **Invoiceable %** - The above represented as a percentage.
4. Click  to hide the time sheet totals.

View Time Sheet Status

View the time sheet status to determine next actions as needed.

To view time sheet status:

1. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. View the Time Sheet status at the top right corner of the time sheet.
Time Sheet status displays as follows:
 - **Due** - This time sheet is in the process of being completed and has not been submitted. You can enter time sheet data and edit time sheet data.

- **Submitted** - The time sheet is submitted for processing, but is not approved. You can open the time sheet, but you cannot enter or edit time sheet data unless your security access allows you to resubmit time sheets.
- **Approved** - The Header portion is approved but certain lines may need approval from the project manager.
- **Fully Approved** - The time sheet is approved and is ready for posting.
- **Rejected** - The time sheet can have this status if one or more of the lines have been rejected by the approver.

Print a Time Sheet

Use these steps to print a time sheet

To print a time sheet:

1. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. Select a time sheet.
3. From the **Other Actions** drop-down list, select **Print**.
The time sheet prints at your default printer.

Submit a Time Sheet

After you enter a time sheet's data, you can submit the time sheet for approval and processing.

To submit a time sheet:

1. Go to **Weekly Time Sheets** or **Daily Time Sheets**.
2. Open a time sheet, review the time sheet for accuracy, and make changes if necessary. Maconomy automatically saves your changes.
3. Click **Submit**.

My Plan

My Plan is a web-based solution that offers employees access to the projects and tasks to which they are assigned (or their time is allocated).

My Plan is available to Maconomy users via a dedicated workspace under the Self Service menu section. It is only available if the company-specific **Enable People Planner Web** system parameter is enabled in the corresponding Workspace Client application.

Note that the supervisor view in My Plan is not part of the current implementation, but is scheduled for a future release.

My Plan Concepts



You can use this workspace to:

- Create a booking
- Edit an existing booking
- Delete a booking

My Plan Fields

This section describes the fields and actions on the My Plan workspace.

Workspace Buttons and Icons

Field	Description
	Click this icon to refresh data in the current workspace.
Date Range Display	Click this link to access the calendar, then select the date/date range for which you want to create or edit bookings. You can also use the arrow buttons on either side of the link to navigate to a different date/date range.
Day	Click this button to switch to the day calendar view.
Week	Click this button to switch to the week calendar view.
Month	Click this button to switch to the month calendar view.
	Click the gear icon to select a user data limitation from the available options. To set up the options list, use the People Planner Windows Application.
Show full day / Show business hours	Click this button if you want the day/week calendar view to display the full day, or business hours only.

My Plan Procedures

This section describes the steps you need to follow to work in the My Plan workspace.

Create a Booking

Employees can create bookings to allocate time for tasks assigned to them.

To create a booking for yourself:

1. Go to **Self Service » My Plan**.
2. If needed, switch to your preferred calendar view. Choose from the following options:
 - Day
 - Week
 - Month
3. Double-click your preferred time slot on the calendar.

Note: To create an all-day appointment, double-click the **all day** slot at the top of either the **Day** or **Week** view, or double-click a day in the **Month** view.

4. In the Create Booking wizard that opens, fill out the fields as needed. Only the **Hours** field is mandatory.

Note: To create an all-day appointment that spans multiple days, specify the first date in the **Start** field and the last date in the **Finish** field.

5. Click **Create**.
Maconomy displays your new booking on the calendar view.

Edit a Booking

You can drag existing bookings to a different date, or drag the top and bottom margins of a booking to extend or shorten its duration. To update other details, you can use this procedure.

To edit a booking:

1. Go to **Self Service » My Plan**.
2. If needed, switch to your preferred calendar view. Choose from the following options:
 - Day
 - Week
 - Month
3. Double-click the booking you want to edit. You can also click the vertical ellipsis on the top right corner of the booking, and then select **Update bookings** from the actions drop-down list.
4. In the Edit Booking wizard that opens, edit the fields as needed.
5. Click **Save**.
Maconomy displays your updated booking on the calendar view.

Delete a Booking

You can also remove bookings from your calendar as needed.

To delete a booking:

1. Go to **Self Service » My Plan**.
2. If needed, switch to your preferred calendar view. Choose from the following options:
 - Day
 - Week
 - Month
3. On the top right corner of the booking you want to delete, click the vertical ellipsis, and then select **Delete bookings**.
4. In the confirmation dialog that displays, click **Delete**.
Maconomy removes the booking from your calendar view.

Expenses and Mileage

The Expenses and Mileage workspaces are tracking tools that allow you to enter work-related expenses and submit them for processing.

Expense and Mileage Concepts

You can enter:

- Job, Task, Description, for expenses you submit.
- A justification for specific expense sheet lines, if required.
- Associate a receipt with an expense sheet line.
- Mileage incurred with work-related travel on the job.

When you record expenses, you can:

- Enter or edit expense information for an open posting period.
- Submit your expenses and / or mileage to a designated administrator for approval and reimbursement.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notifications are included:

- **Submit Expense Sheet** - Appears for the user to indicate the pending submission of expense sheets. This notification points to the relevant expense sheet.

- **Submit Mileage Sheet** - Appears for the user to indicate the pending submission of mileage sheets. This notification points to the relevant mileage sheet.
- **Rejected Expense Sheet** - Appears for the user to indicate that a submitted expense sheet has been rejected. This notification points to the relevant expense sheet.
- **Rejected Expense Sheet Lines** - Appears for the user to indicate that a submitted expense sheet line has been rejected. This notification points to the relevant expense sheet, with the rejected line highlighted.
- **Rejected Mileage Sheet** - Appears for the user to indicate that a submitted mileage sheet has been rejected. This notification points to the relevant mileage sheet.
- **Rejected Mileage Sheet Lines** - Appears for the user to indicate that a submitted mileage sheet line has been rejected. This notification points to the relevant mileage sheet, with the rejected line highlighted.

Expense Fields




This section describes the fields and actions on the Expenses workspace.

Card Part Fields

Field	Description
Expense Sheet No.	This field displays the number of this expense report.
Job	This field displays the name and number of the job for which the expenses in the current record were incurred.
Employee	This field displays the name of the employee whose expense entries are listed in the workspace.
Total Amount	This field displays the following information: <ul style="list-style-type: none"> ▪ The base currency used by the employee's company ▪ The total amount (including tax) for the lines in the table part
Period	This field displays the period during which this expense occurs.
Currency	This field displays the specified currency for the expense sheet. Specifying a value in the Exchange Rate field overrides the default exchange rate Maconomy uses for this currency. Maconomy then applies the specified exchange rate to the lines of the expense sheet that use this currency.
Exchange Rate	This field displays the exchange rate for the specified currency. If a user does not specify an exchange rate, Maconomy uses the default rate for the currency. If a user changes the value of this field, Maconomy uses that value instead.

Field	Description
Status	This field displays the status of the current expense sheet. It can have one of the following values: <ul style="list-style-type: none"> ▪ New ▪ Approved ▪ Rejected ▪ Submitted ▪ In Progress
Settlement Status	This field displays whether the related vendor entries have been settled (paid).
Copy from Expense Sheet	If you copied lines from another expense sheet, this field displays that expense sheet's number.

Card Part Actions

Button	Description
+ New Expense Sheet	Click this action to create an expense sheet.
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. <div> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p> </div>
Approve	Click this action button to approve the current record.

Button	Description
	<p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Reject...	<p>Click this action button to reject the current record.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Other Actions	<p>In the Expenses workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Reopen ▪ Print ▪ Copy From - Select this action to copy lines from an expense sheet, and add these lines to the expense sheet you are currently working on. ▪ Duplicate - Select this action to duplicate an existing expense sheet, and create a new expense sheet. ▪ Attach Receipts ▪ Undo Approval/Reject ▪ Delete Expense Sheet

Registrations Tab


This section describes the fields and actions on the Registrations tab of the Expenses workspace.






Tab Fields

Field	Description
Entry Date	Enter a date for this expense.
Favorite	<p>In this field, you can select a favorite.</p> <p>Note: Choosing a favorite may change other details specified for the expense sheet line, such as the job or task.</p>
Job No.	<p>Use this or the Job Name field to specify the job for which you are incurring the expense.</p> <p>Filling out one field will auto-populate the other.</p>
Job Name	Use this or the Job No. field to specify the job for which you are incurring the expense.

Field	Description
	Filling out one field will auto-populate the other.
Task	Enter the task assigned to the specified expense.
Description	Enter a description for the task specified on the current line.
Quantity	Specify the number of units of the current activity for which an expense is incurred.
Unit Price	Enter the price per unit.
Tax Code 1-3	In these fields, select a G/L tax code to apply to the current line.
Tax Amount 1-3	These fields display the taxed amount according to the selected code in the Tax Code 1-3 fields.
Currency	Enter the currency in which the expense was incurred.
Amount	This field displays the total expense amount for the current activity in the currency chosen in the Currency field. The amount is calculated as the value in the Quantity field multiplied by the value in the Unit Price field.
Just. Req.	This field is checked if the user is required to enter a justification for that expense line. Whether this field is checked depends on setup performed outside of the Maconomy web client.
Receipt	Use this field to attach a receipt to the current expense sheet line. You can attach a document from your local storage, or select one from those already uploaded to the Receipts tab of this workspace.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Registrations tab, choose from the following actions:</p> <ul style="list-style-type: none"> ■ Insert Expense Sheet Line ■ Delete Expense Sheet Line ■ Create favorite ■ Attach Receipt To Line ■ View Receipt

Button	Description
+ Add Expense Sheet Line	Click this action to add another entry line to the bottom of the expense sheet.
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Justification Part Fields

Note: Whether these fields are enabled depends on setup performed outside of the Maconomy web client.

Field	Description
Heading	The values available in the drop-down list depend on the task specified on the expense sheet line. Select the appropriate value for the expense. For example, if you specified "Hotel" in the Task field on the expense sheet line, select the value "Hotel Name" here. If the Just. Req. field is checked, this field is required.
Value	The values available in the drop-down list depend on the task specified on the expense sheet line. Select the appropriate value for the expense. For example, if you specified "Hotel" in the Task field on the expense sheet line, select the name of the hotel here. If the Just. Req. field is checked, this field is required.
Date	Enter the date the specific expense was incurred. If the Just. Req. field is checked, this field is required.


Receipts Tab






This section describes the fields and actions on the Receipts tab of the Expenses workspace.

Tab Fields

Field	Description
Document Name	<p>This field displays the file name of any document uploaded to the Receipts tab. This tab serves as an archive for the current expense sheet, and you can attach any of the documents listed here to the lines of the expense sheet.</p> <p>Click on the file name to download the document.</p> <p>If you attach a document straight from your local storage, Maconomy automatically uploads this document to the Receipts tab as well.</p>
Type	This field displays the document's file type/format-for example, .doc, .xls, .ppt, and so on. This field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the document's file size (in bytes).
Changed On	This field displays the date when the file/document was last modified. If the file has not been modified, this field displays the date when the file was uploaded to the Receipts tab/attached to an expense sheet line.
Changed By	This field displays the name of the last user to upload the file/document to the Receipts tab, or attach the file to an expense sheet line.
Remark	Enter any additional remarks in this field.
Attached to Expense Sheet Line	This field is selected if the document specified in the line is attached to an expense sheet line.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Receipts tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Update Receipt - Click this action to change the file attached to the expense sheet. ▪ Delete Receipt ▪ View Receipt - Click this action to view the file attached to the expense sheet.

Button	Description
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Expense Procedures

This section describes the steps you need to work with expenses.

Create an Expense Sheet

Use these steps to create an expense sheet.

To add a new Expense Sheet:

1. Go to the Expenses workspace.
2. Click **+ New Expense Sheet**.
The Create Expense Sheet wizard displays.
3. Enter a Description. This is a free-text field.
4. Enter a Job for which the expense was incurred.
5. Enter the Start and End Dates for this expense.
6. Select an Employee Name from the drop-down list. Specify your name, or that of another employee (if you are registering by proxy).
7. Enter the Currency in which the expense was incurred.
8. Click **Create**.
Maconomy automatically displays the expense sheet you just created.
9. To add lines to the expense sheet, click **+ Add Expense Sheet Line**.
10. Fill out the line fields as needed.
11. Click **Save**.

12. If the **Just. Req.** field is selected for the line, fill out the fields in the Justification pane as well.
13. Click **Save**.

Copy from an Expense Sheet

You can copy lines from an existing expense sheet. This action copies job and task numbers, but resets quantities and amounts to zero.

To copy from an expense sheet:

1. Go to the Expenses workspace.
2. Select the expense sheet you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**.
The Copy From Expense Sheet wizard displays.
4. Select the expense sheet from which you want to copy lines.
5. Click **Copy from Expense Sheet**.
Maconomy adds the copied lines to the Registrations tab of the current expense sheet and automatically saves your changes.

Edit an Expense Sheet

Use these steps to edit an expense sheet.

To edit an expense sheet:

1. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an existing expense report to edit.

Note: You can only edit reports that are not yet submitted/have been reverted to unsubmitted status.

3. Edit the fields as needed.
4. Click **Save** or press ENTER.
5. To add additional lines to the expense sheet, click **+ Add Expense Sheet Line**.
6. Fill out the line fields as needed.
7. Click **Save** or press ENTER.
8. If the **Just. Req.** field is selected for the line, fill out the fields in the Justification pane as well.
9. Click **Save** or press ENTER.

Duplicate an Expense Sheet

Use these steps to duplicate an existing expense sheet. The **Duplicate...** action copies header information, job and task numbers, and quantities and amounts.

To duplicate an expense sheet:

1. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an expense sheet.
3. From the **Other Actions** drop-down list, select **Duplicate...**
In the dialog that opens, Maconomy displays the following message: A new expense sheet will be created with a copy of the current fields and lines.
4. Click **Duplicate**.
Maconomy navigates to the new expense sheet duplicated from the original, and displays the following message: A new expense sheet ([expense sheet no.]) has been created from [expense sheet no. of the original].
5. Click **OK**.

Attach a Receipt to an Expense Sheet Line

When associating a receipt with an expense sheet line, you have two options. You can attach the receipt directly from your local drive, or you can choose to associate an expense sheet line with an existing receipt.

To attach a receipt to an expense sheet:

1. Go to the Expenses workspace.
 2. Use the search filter and/or the **Search** field to select an expense sheet.
 3. In the Registrations tab, select the line you want to update.
 4. To attach a receipt from your local drive:
 - a) Click **Row Tools » Attach Receipt To Line**.
 - b) In the dialog that opens, click **Select files** to open your file explorer.
 - c) Select the file you want to upload.
 - d) Click **Open**, or press ENTER.
Maconomy lists the file you selected in the dialog. You can opt to delete it, and select another file.
- Note:** Instead of performing steps b-d, you can opt to select the file from your file browser window, then drag and drop it into the Attach Document To Line dialog.
- e) Click **Ok**.
Maconomy attaches the receipt to the expense sheet line, and also adds the file to the Receipts tab of the Expenses workspace.

Note: If you want to enter additional remarks for a specific receipt, you can fill out the **Remark** field for that receipt in the Receipts tab. Click **Save**, or press ENTER to save the information.

5. To attach a receipt listed in the Receipts tab:
 - a) In the **Receipt** field, select a file from the drop-down list.
 - b) Click **Save**.
Maconomy attaches the file to the expense sheet line.

Add Receipts to the Receipts Tab

To add several receipts at once, perform a batch upload from the Receipts tab.

To upload several receipts:

1. Go to the **Expenses workspace » Receipts tab**.
2. Use the search filter and/or the **Search** field to select an expense sheet.
3. From the **Other Actions** drop-down list, select **Attach Receipts**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the files you want to upload.
6. Click **Open**, or press ENTER.
Maconomy lists the files you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the files from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy uploads the files and lists them in the Receipts tab.

Note: If you want to enter additional remarks for a specific receipt, you can fill out the **Remark** field for that receipt in the Receipts tab. Click **Save**, or press ENTER to save the information.

View a Receipt

You can view any receipt attached to an expense sheet line in the Registrations tab, or listed in the Receipts tab.

To view a receipt:

1. Go to the Expenses workspace.
2. In either the Registrations or Receipts tab, select a line.
3. Click **Row Tools » View Receipt**.
The file is downloaded to your computer/device.

Note: In the Receipts tab, clicking the filename displayed in the **Document** field also downloads the file to your local storage.

Delete an Expense Sheet

Use these steps to delete an expense sheet.

To delete an expense sheet:

1. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an existing expense report to delete.

Note: You can only delete reports that are not yet submitted.

3. From the **Other Actions** drop-down list, select **Delete Expense Sheet**.
A confirmation window appears.
4. Click **Delete** to confirm deletion, or **Cancel** to exit without deleting.

Print an Expense Sheet

Use these steps to print an expense sheet.

To print an expense sheet:

1. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an expense sheet.
3. From the **Other Actions** drop-down list, select **Print**.
The expense sheet prints at your default printer.

Submit an Expense Sheet

Use these steps to submit an expense sheet.

To submit an expense sheet:

1. Go to the Expenses workspace.
2. Use the search filter and/or the **Search** field to select an existing expense sheet.

Note: You can only submit open expense sheets.

3. Click **Submit**.

Approve or Reject an Expense Sheet

Use these steps to review and approve or reject new/updated expense sheets submitted for your approval. You can also approve (and reject) expense sheets in the Approval Center workspace.

To approve/reject an expense sheet:

1. Go to the Expense workspace.
2. Use the search filter and/or the **Search** field to select an expense sheet.
3. To approve the expense sheet:
 - a) Click **Approve**.

Note: Maconomy approves the header and any of the lines that the user is also responsible for approving.

4. To reject the expense sheet:
 - a) Click **Reject....**
Maconomy displays the Reject Line wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Mileage Fields




This section describes the fields and actions on the Mileage workspace.

Card Part Fields

Field	Description
Mileage Sheet No.	This field displays the number of this mileage sheet.
Job	This field displays the name and number of the job for which the mileage expenses in the current record were incurred.
Employee	This field displays the name of the employee whose mileage entries are listed in the workspace.
Period	This field displays the period during which the mileage expenses in the current record were incurred.
Total Amount	This field displays the following information: <ul style="list-style-type: none"> ■ The base currency used by the employee's company ■ The total amount (including tax) for the lines in the table part
Status	This field displays the status of the current mileage sheet. It can have one of the following values:

Field	Description
	<ul style="list-style-type: none"> ▪ New ▪ Approved ▪ Rejected ▪ Submitted ▪ In Progress
Copy from Mileage Sheet	If you copied lines from another mileage sheet, this field displays that mileage sheet's number.

Card Part Actions

Button	Description
+ New Mileage Sheet	Click this action to create a mileage sheet.
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow. </div>
Approve	Click this action button to approve the current record. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow. </div>

Button	Description
Reject...	<p>Click this action button to reject the current record.</p> <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies. </div>
Other Actions	<p>In the Mileage workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Reopen ▪ Print ▪ Copy From - Select this action to copy lines from an mileage sheet, and add these lines to the mileage sheet you are currently working on. ▪ Duplicate - Select this action to duplicate an existing mileage sheet, and create a new mileage sheet. ▪ Attach Documents ▪ Undo Approval/Reject ▪ Delete Mileage Sheet

Registrations Tab






This section describes the fields and actions on the Registrations tab of the Mileage workspace.


Tab Fields

Field	Description
Entry Date	Enter a date for this mileage expense.
Favorite	<p>In this field, you can select a favorite.</p> <div> Note: Choosing a favorite may change other details specified for the mileage sheet line, such as the job or task. </div>
Job No.	<p>Use this or the Job Name field to specify the job for which you are incurring the mileage expense.</p> <p>Filling out one field will auto-populate the other.</p>
Job Name	<p>Use this or the Job No. field to specify the job for which you are incurring the mileage expense.</p> <p>Filling out one field will auto-populate the other.</p>
Quantity	Specify the number of units of the current activity for which a mileage expense is incurred.

Field	Description
Amount	This field displays the total expense amount for the current activity in the currency chosen in the Currency field. The mileage rate is derived by setup in the system.
Vehicle	In this field, select a vehicle from the drop-down list.
From	Enter the starting point of the mileage expense. This is a free-text field.
To	Enter the ending point of the mileage expense. This is a free-text field.
Document	Use this field to attach a document to the current mileage sheet line. You can attach a document from your local storage, or select one from those already uploaded to the Documents tab of this workspace.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Registrations tab, choose from the following actions:</p> <ul style="list-style-type: none"> ■ Insert Mileage Sheet Line ■ Delete Mileage Sheet Line ■ Create favorite ■ Attach Document to Line ■ View Document
+ Add Mileage Sheet Line	Click this action to add another entry line to the bottom of the mileage sheet.
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	<p>Click to maximize the table view.</p> <p>Click to restore the default display size of the table.</p>

Button	Description
	Click to open the Customize Columns window.


Documents Tab






This section describes the fields and actions on the Documents tab of the Mileage workspace.

Tab Fields

Field	Description
Document Name	This field displays the file name of any document uploaded to the Documents tab. This tab serves as an archive for the current mileage sheet, and you can attach any of the documents listed here to the lines of the mileage sheet. Click on the file name to download the document. If you attach a document straight from your local storage, Maconomy automatically uploads this document to the Documents tab as well.
Type	This field displays the document's file type/format-for example, .doc, .xls, .ppt, and so on. This field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the document's file size (in bytes).
Changed On	This field displays the date when the file/document was last modified. If the file has not been modified, this field displays the date when the file was uploaded to the Documents tab/attached to a mileage sheet line.
Changed By	This field displays the name of the last user to upload the file/document to the Documents tab, or attach the file to a mileage sheet line.
Remark	Enter any additional remarks in this field.
Attached to Line	This field is selected if the document specified in the line is attached to a mileage sheet line.

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Documents tab, choose from the following actions: <ul style="list-style-type: none"> ▪ Update Document

Button	Description
	<ul style="list-style-type: none"> ▪ Delete Document ▪ View Document
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Mileage Procedures

This section describes the steps you need to work with mileage sheets.

Create a Mileage Sheet

Use these steps to add a new mileage sheet.

To create a mileage sheet:

1. Go to the Mileage workspace.
2. Click **+ New Mileage Sheet**.
The Create Mileage Sheet wizard displays.
3. Select an Employee Name from the drop-down list. Specify your name, or that of another employee (if you are registering by proxy).
4. Enter a Description. This is a free-text field.
5. Select the Job for which the mileage expense was incurred.
6. Click **Create**.
Maconomy automatically displays the mileage sheet you just created.
7. To add lines to the mileage sheet, click **+ Add Mileage Sheet Line**.
8. Fill out the line fields as needed.
9. Click **Save**.

Copy from a Mileage Sheet

You can copy lines from an existing mileage sheet. This action copies job and task numbers, but resets quantities and amounts to zero.

To copy from a mileage sheet:

1. Go to the Mileage workspace.
2. Select the mileage sheet you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**.
The Copy From Mileage Sheet wizard displays.
4. Select the mileage sheet from which you want to copy lines.
5. Click **Copy From Mileage Sheet**.
Maconomy adds the copied lines to the current mileage sheet and automatically saves your changes.

Edit a Mileage Sheet

Use these steps to edit a mileage sheet.

To edit a mileage sheet:

1. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select an existing mileage sheet to edit.

Note: You can only edit mileage sheets that are not yet submitted.

3. Edit the fields as needed.
4. Click **Save** or press ENTER.
5. Click **+ Add Mileage Sheet Line** to add additional lines to this mileage sheet.
6. Edit the fields as needed.
7. Click **Save** or press ENTER.

Duplicate a Mileage Sheet

Use these steps to duplicate an existing mileage sheet.

To duplicate a mileage sheet:

1. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select a mileage sheet.
3. From the **Other Actions** drop-down list, select **Duplicate...**.
In the dialog that opens, Maconomy displays the following message: A new mileage sheet will be created with a copy of the current fields and lines.
4. Click **Duplicate**.

Maconomy navigates to the new mileage sheet duplicated from the original, and displays the following message: A new mileage sheet ([mileage sheet no.]) has been created from [mileage sheet no. of the original].

5. Click **OK**.

Attach a Document to a Mileage Sheet Line

When associating a document with a mileage sheet line, you have two options. You can attach the document directly from your local drive, or you can choose to associate a mileage sheet line with an existing document.

To attach a document to a mileage sheet line:

1. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select a mileage sheet.
3. In the Registrations tab, select the line you want to update.
4. To attach a document from your local drive:
 - a) Click **Row Tools » Attach Document to Line**.
 - b) In the dialog that opens, click **Select files** to open your file explorer.
 - c) Select the file you want to upload.
 - d) Click **Open**, or press ENTER.
Maconomy lists the file you selected in the dialog. You can opt to delete it, and select another file.

Note: Instead of performing steps b-d, you can opt to select the file from your file browser window, then drag and drop it into the Attach Document To Line dialog.

- e) Click **OK**.
Maconomy attaches the document to the mileage sheet line, and also adds the file to the Documents tab of the Mileage workspace.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

5. To attach a document listed in the Documents tab:
 - a) In the **Document** field, select a file from the drop-down list.
 - b) Click **Save**.
Maconomy attaches the file to the mileage sheet line.

Add Documents to the Documents Tab

To add several documents at once, perform a batch upload from the Documents tab.

To upload several documents:

1. Go to **Mileage workspace » Documents tab**.
2. Use the search filter and/or the **Search** field to select a mileage sheet.
3. From the **Other Actions** drop-down list, select **Attach Documents**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the files you want to upload.
6. Click **Open**, or press ENTER.
Maconomy lists the files you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the files from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy uploads the files and lists them in the Documents tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

View a Document

You can view any document attached to a mileage sheet line in the Registrations tab, or listed in the Documents tab.

To view a document:

1. Go to the Mileage workspace.
2. In either the Registrations or Documents tab, select a line.
3. Click **Row Tools » View Document** on the line.
The file is downloaded to your computer/device.

Note: In the Documents tab, clicking the filename displayed in the **Document** field also downloads the file to your local storage.

Delete a Mileage Sheet

Use these steps to delete a mileage sheet.

To delete a mileage sheet:

1. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select an existing mileage sheet to delete.

Note: You can only delete reports that are not yet submitted.

3. From the **Other Actions** drop-down list, select **Delete Mileage Sheet**.
A confirmation window appears.
4. Click **Delete** to confirm deletion, or **Cancel** to exit without deleting.

Print a Mileage Sheet

Use these steps to print a mileage sheet.

To print a mileage sheet:

1. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select a mileage sheet.
3. From the **Other Actions** drop-down list, select **Print**.
The mileage sheet prints at your default printer.

Submit a Mileage Sheet

Use these steps to submit a mileage sheet.

To submit a mileage sheet:

1. Go to the Mileage workspace.
2. Use the search filter and/or the **Search** field to select an existing mileage sheet.

Note: You can only submit open mileage sheets.

3. Click **Submit**.

Approve or Reject a Mileage Sheet

Use these steps to review and approve or reject new/updated mileage sheets submitted for your approval. You can also approve (and reject) mileage sheets in the Approval Center workspace.

To approve/reject a mileage sheet

1. Go to the Mileage workspace.

2. Use the search filter and/or the **Search** field to select a mileage sheet.
3. To approve the mileage sheet:
 - a) Click **Approve**.

Note: Maconomy approves the header and any of the lines that the user is also responsible for approving.

4. To reject the mileage sheet:
 - a) Click **Reject...**

Note: Maconomy displays the Reject Line wizard.

- b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Favorites

Favorites are saved combinations of a project and a task that enable you to have easy access to them when entering time and expense information.




Favorite Concepts

You can access your current Maconomy Favorites as well as create additional Favorites.

Favorites Fields








This section describes the fields and actions on the Favorites workspace.

Favorites Fields

Field	Description
Favorite	Enter a name for this Favorite. This is a free-text field.
Job No.	Click  to select a job number with which this Favorite is associated.
Job Name	Click  to select a job name with which this Favorite is associated.
Task	Click  to select a task with which this Favorite is associated.
Time	This field indicates that the Favorite is available on time sheets.
Expense	This field indicates that the Favorite is available on Expense Sheets.

Field	Description
Mileage	This field indicates that the Favorite is available on Mileage Sheets.

Favorites Actions

Button	Description
	Click this icon to refresh data in the current workspace.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
	<p>The Row Tools icon allows you to add lines/information to the lines of a record. Available actions at this level vary from one workspace to another.</p> <p>For Favorite lines, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Favorite ▪ Delete Favorite
+ Add Favorite	Click this action to add another entry line to the bottom of the Favorites list.
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	<p>Click to maximize the table view.</p> <p>Click to restore the default display size of the table.</p>
	Click to open the Customize Columns window.

Favorites Procedures


This section describes the steps you need to follow to work with favorites.

Use favorites to do the following:

Create a Favorite

Use these steps to create a favorite.

To create a favorite:

1. Go to the Favorites workspace.
2. Click **+ Add Favorite**.
3. In the **Favorite** field, enter a name for this Favorite. This is a free-text field.
4. In the **Job No.** or **Job Name** field, click  to select a job with which this Favorite is associated.
5. If you want to undo your changes, click **Revert**, or click **Row Tools » Revert** on the line itself. Otherwise, click **Save**.

Create a Favorite from a Time/Expense/Mileage Sheet Line

Use these steps to create a favorite from within a time/expense/mileage sheet.

To create a favorite:


1. Go to one of the following workspaces:
 - Weekly Time Sheets
 - Daily Time Sheets
 - Expenses
 - Mileage
2. On the line you want to make a Favorite, click **Row Tools » Create Favorite**. Your changes are saved automatically, and the line is added to Favorites.

Use Favorites

Use these steps to use favorites in Time, Expense, and Mileage Sheets.

To use favorites:

1. Go to one of the following workspaces:
 - Weekly Time Sheets
 - Daily Time Sheets

- Expenses
 - Mileage
2. From within the Time, Expense, or Mileage Sheet, click  in the **Job**, **Job Name**, or **Task** field. A list of Favorites displays.
 3. Scroll and select the Favorite to use on this line.

Delete a Favorite

Use these steps to delete a favorite.

To delete a favorite:

1. Go to the Favorites workspace.
2. Select an existing Favorite to delete.
3. Click **Row Tools » Delete** on the line.
A confirmation window appears.
4. Click **Delete** to confirm deletion, or **Cancel** to exit without deleting.

Absence

Use the Absence workspace to easily create and submit absence-related requests for approval, and view your available and booked absence time.

Absence Concepts

This workspace enables the following processes:

- Creating and submitting a new absence request
- Creating and submitting allowance requests (such as requests for additional time-in-lieu)
- Viewing a period summary of the employee's own absences
- Viewing approved and rejected absence requests
- Viewing approved and rejected allowance requests

Note: For both absence and allowance requests, you can view all requests of all statuses (unsubmitted, submitted, approved, or rejected).

General Process

In general, you request absences by creating a request with the start and end dates, and type of absence (such as vacation). An absence approver is notified of such a request, and they can approve or reject the request, and give a reason.

You have a certain number of allowed absence days in a vacation period, and you can only request time that is available in a period.

Note: For complete Absence Management functionality information, including setup, refer to Maconomy Workspace Client documentation, including online help and Concepts Guide.

General Process for Everyday Use

This section shows the everyday process you use for managing absences.

This is the everyday process for Absence Management:

- Employees request absences and view their overall absence information as needed.
 - Use the Absence Requests workspace for this step.
 - A notification is sent to the approver.
- Absence approvers accept or reject the request. They can view all employee absence information to help make the decision.
 - Approvers use the Absence Approval workspace for this step.
 - A notification is sent to the employee.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notifications are included:

- **Approved Absence-** Appears for the absence requester to indicate that the absence request is approved. It also indicates the relevant request in the Absence workspace.
- **Rejected Absence-** Appears for the absence requester to indicate that the absence request has been rejected. This notification will point to the relevant request in the Absence workspace.
- **Submit Allowance Request-** Appears to alert employees that they have created but not submitted an allowance request.
- **Approved Allowance Request-** Similar to "Approved Absence," but for Allowance requests.
- **Rejected Allowance Request -** Similar to "Rejected Absence," but for Allowance requests.


Absence Fields

Use this tab to easily create and submit absence requests for approval, and view your available and booked absence time. Available time is shown in the header and in the Period Overview tab.

Card Part Fields

Field	Description
Employee	This field displays the name and number of the employee currently logged in.
Date Selected	This field displays the date you selected using the left/right arrows or the calendar widget found in the top portion of the workspace.

Card Part Actions

Button	Description
Date Range Display	Click this link to access the calendar. Select the appropriate date range to enter absence information. You can also use the arrow buttons on either side of the link to navigate to a different date range.
	Click this icon to refresh data in the current workspace.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.

Period Summary Tab

Use the Period Summary tab to see booked and available absence time to help gauge when is the best time for planned absences.

This tab shows your absence allowance, as well as used, carried forward, and remaining time for the selected vacation period for each relevant absence type.

Tab Fields

Field	Description
Allowance	This portion shows the time that has been granted for absence bookings for the whole period, broken down according to the following: <ul style="list-style-type: none"> ■ Illness ■ Leave

Field	Description
	<ul style="list-style-type: none"> Vacation Time in Lieu <p>These numbers does not change as you book absences. It only changes if your manager changes your allowance.</p>
Carried Forward	<p>This portion shows time that is carried forward from another absence period for each absence type, broken down according to the following:</p> <ul style="list-style-type: none"> Illness Leave Vacation Time in Lieu
Available	<p>This portion shows how much time you have left for booking in this vacation period, broken down according to the following:</p> <ul style="list-style-type: none"> Illness Leave Vacation Time in Lieu <p>It uses this formula: Available = Allowance + Carried Forward (to this period) - Booked - Carried Forward To Following Period.</p> <div style="border: 1px solid blue; padding: 5px;"> <p>Note: There is no field to show the last term.</p> </div> <p>For example, if you started the period with 25 days of allowance, but then booked 5 days of vacation, this number shows 20.</p>
Booked	<p>This portion shows time that is planned, approved, and scheduled, broken down according to the following:</p> <ul style="list-style-type: none"> Illness Leave Vacation Time in Lieu

Absence Requests Tab



This section describes the fields and actions on the Absence Requests tab of the Absence workspace.





Tab Fields

Field	Description
First Day of Absence	This field displays the first day of the absence request period in this request. This field is editable only when you are creating a new absence request. Click the calendar icon in the field to select a date, or enter the date manually.
1/2 Day	<p>When registering absence in days: Select this check box if the first day of the absence request period is a half-day.</p> <p>When registering absence in hours (only available if you are running Maconomy 2.4 GA or later in the backend): If the number of hours you enter for the first day is equivalent to a half-day, Maconomy selects this check box automatically.</p>
Hours, First Day	This field is available only if you are running Maconomy 2.4 GA or later in the backend, and the vacation period setup requires registration in hours. In this field, specify the number of hours of absence on the first day.
Last Day of Absence	In this field, specify the last day of the absence request period. Click the calendar icon in the field to select a date, or enter the date manually.
1/2 Day	<p>When registering absence in days: Select this check box if the last day of the absence request period is a half-day.</p> <p>When registering absence in hours (only available if you are running Maconomy 2.4 GA or later in the backend): If the number of hours you enter for the last day is equivalent to a half-day, Maconomy selects this check box automatically.</p>
Hours, Last Day	This field is available only if you are running Maconomy 2.4 GA or later in the backend, and the vacation period setup requires registration in hours. In this field, specify the number of hours of absence on the last day.
Duration	<p>When registering absence in days: This field displays the total number of days spanned by the absence request period (from the first day to the last day, including non-working days). It also displays the time unit used.</p> <p>When registering absence in hours (only available if you are running Maconomy 2.4 GA or later in the backend): This field displays the total number of working hours spanned by the absence request period (from the first day to the last day), thus making the value the same as that of the Working Time field. It also displays the time unit used.</p>

Field	Description
	Maconomy fills out this field automatically after you save the absence request.
Working Time	<p>This field displays the total number of working days (or hours) spanned by the absence request period. It also displays the time unit used.</p> <p>Maconomy fills out this field automatically after you save the absence request.</p> <p>If the absence was registered in hours, this field will have the same value as the Duration field.</p>
Absence Type	<p>Select the applicable absence type from the drop-down list. The system administrator can configure the list of available options. For example, the drop-down list could include the following absence types:</p> <ul style="list-style-type: none"> ▪ Illness ▪ Time in Lieu ▪ Vacation <p>This is a required field.</p>
Remarks	Enter any additional remarks in this field.
Submitted	This check box is selected if the current absence request line has been submitted.
Approved	This check box is selected if the current absence request line has been approved.
Rejected	This check box is selected if the current absence request line has been rejected.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Absence Requests tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Submit Request ▪ Reopen Request ▪ Delete Request
+ New Absence Request	Click this action to create an absence request.
	<p>Click to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>

Button	Description
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Allowance Requests Tab

Create and submit allowance requests if you need to add absence time to your available pool of time. For example, if you put in extra hours on a project, you might ask for compensation of those hours as time-in-lieu, and you can state the reason in the **Reason** field on the request.

After the request is submitted, it is approved or rejected. If it is approved, the approver can put restrictions on the allowance, such as that the newly allowed time-in-lieu day is only available for the next two weeks.

Note: An *allowance request* is different from an *absence request*. The former will add days to the employee's pool of available absence, while the latter is used to book an actual absence period.



Use the Allowance Requests tab to create a new allowance request, specifying the number of days, the absence type, and a reason for requesting this allowance. For example, request five time-in-lieu days with a reason as well as the job number for a project on which you work.





Tab Fields

Field	Description
Entry Date	This field displays the date on which the allowance request was entered. Maconomy then suggests this to the approver as the "From Date" for the new allowance's validity period. When creating or editing an allowance request, you can change the date specified in this field.
Absence Type	In this field, specify the absence type for which you are requesting an allowance. Select a value from the drop-down list. The system administrator can configure the list of available options. For example, the drop-down list could include the following absence types:

Field	Description
	<ul style="list-style-type: none"> Leave Time in Lieu Vacation <p>This is a required field.</p>
Time Registered	Enter the number of days (or hours) you want to add to your allowance. During allowance approval, the approver can change the value you entered for this field.
Time Unit	<p>Select the time unit you want to use. You can only select hours as the time unit if you are running Maconomy 2.4 GA or later in the backend.</p> <p>During allowance approval, the approver can change the number you entered for the Time Registered field, but cannot change the time unit you specified.</p>
Reason	Enter a reason for the allowance request.
Valid Till	This field displays the date through which the allowance is available. This field will only have a value once the request is approved.
Submitted	This check box is selected if the current allowance request line has been submitted.
Approved	This check box is selected if the current allowance request line has been approved.
Rejected	This check box is selected if the current allowance request line has been rejected.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Allowance Requests tab, choose from the following actions:</p> <ul style="list-style-type: none"> Submit Request Reopen Request Delete Request
+ New Allowance Request	Click this action to create an allowance request.
	<p>Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>

Button	Description
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Absence Procedures

This section describes the steps you need to follow to work with absences.

Use Maconomy absence management to do the following:

Create an Absence Request

Use these steps to create an absence request.

To create an absence request:

1. Go to **Absence workspace » Absence Requests tab**.
2. Click **+ New Absence Request**.
3. If you are registering absence in days:
 - a) In the **First Day of Absence** field, specify the first date of the absence period.
 - b) If the date you specified is a half-day, select the **½ Day** check box.
 - c) In the **Last Day of Absence** field, specify the last day of the absence period.
 - d) If the date you specified is a half-day, select the **½ Day** check box.
4. If you are registering absence in hours (only available if you are running Maconomy 2.4 GA or later in the backend):
 - a) In the **First Day of Absence** field, specify the first date of the absence period.
 - b) In the **Hours** field, specify the number of hours of absence on the first day.

Note: If the number of hours you enter is equivalent to a half-day, Maconomy selects the **½ Day** field automatically.

- c) In the **Last Day of Absence** field, specify the last date of the absence period.
- d) In the **Hours** field, specify the number of hours of absence on the last day.

Note: If the number of hours you enter is equivalent to a half-day, Maconomy selects the $\frac{1}{2}$ **Day** field automatically.

5. In the **Absence Type** field, select an absence type from the drop-down list. This is a required field.
6. Enter additional remarks if needed.
7. Click **Save**.
Maconomy automatically fills out the **Duration** and **Working Time** fields, and displays your absence request as a line in the Absence Requests tab. You can then edit, submit, or delete your absence request.

Edit an Absence Request

Use these steps to edit an absence request.

To edit an absence request:

1. Go to **Absence workspace » Absence Requests tab**.
2. Select the line you want to edit.
3. Edit the fields as needed, per instructions in Create an Absence Request.
4. To save your changes, click **Save** or press ENTER.

Edit / Reopen a Submitted Absence Request

Use these steps to edit or reopen a submitted absence request.

To edit / reopen a submitted request:

1. Go to **Absence workspace » Absence Requests tab**.
2. On the line you want to edit, click **Row Tools » Reopen Request**.
3. Edit the fields as needed, per instructions in Create an Absence Request.
4. To save your changes, click **Save** or press ENTER.

Submit an Absence Request

Use these steps to submit an absence request.

To submit an absence request:

1. Go to **Absence workspace » Absence Requests tab**.
2. On the line you want to submit, click **Row Tools » Submit Request**.

Warning: Maconomy displays an error message if you do not have sufficient time available for this absence request.

Once you successfully submit the absence request, Maconomy sends a notification to the absence approver, who can either approve or reject your request.

Delete an Absence Request

Use these steps to delete an absence request.

To delete an absence request:

1. Go to **Absence workspace » Absence Requests tab**.
2. On the line you want to delete, click **Row Tools » Delete Request**.
Maconomy deletes the line, and automatically refreshes the workspace.

Allowance Procedures

This section describes the steps you need to work with allowances.

Use allowance management to do the following:

Create an Allowance Request

Use these steps to create an allowance request.

To create an allowance request:

1. Go to **Absence workspace » Allowance Requests tab**.
2. Click **+ New Allowance Request**.
3. In the **Entry Date** field, specify the date from which you would like the allowance to be available.

Note: Allowance is valid only within the period from Entry Date to the Valid Till date, which is set by the absence approver. The granted time cannot be booked before or after that period.
4. In the **Absence Type** field, select an absence type from the drop-down list.
5. In the **Time Unit** field, select the time unit you want to use.
You can only specify hours as the time unit if you are running Maconomy 2.4 GA (or later) in the backend.
6. In the **Time Registered** field, enter the number of days (or hours) you want to add to your allowance.
7. In the **Reason** field, enter the reason for your request or provide relevant comments.
8. Click **Save**.
Maconomy displays your allowance request as a line in the Allowance Requests tab. You can then edit, submit, or delete your allowance request.

Edit an Allowance Request

Use these steps to edit an allowance request.

To edit an allowance request:

1. Go to **Absence workspace » Allowance Requests tab**.
2. Select the line you want to edit.
3. Edit the fields as needed, per instructions in Create an Allowance Request.
4. To save your changes, click **Save** or press ENTER.

Edit / Reopen a Submitted Allowance Request

Use these steps to edit or reopen a submitted request.

To edit / reopen a submitted allowance request:

1. Go to **Absence workspace » Allowance Requests tab**.
2. On the line you want to edit, click **Row Tools » Reopen Request**.
3. Edit the fields as needed, per instructions in Create an Allowance Request.
4. To save your changes, click **Save** or press ENTER.

Submit an Allowance Request

Use these steps to submit an allowance request.

To submit an allowance request:

1. Go to **Absence workspace » Allowance Requests tab**.
2. On the line you want to submit, click **Row Tools » Submit Request**.
Once you successfully submit the allowance request, Maconomy sends a notification to the allowance approver, who can either approve or reject your request.
If the request is approved, Maconomy adds the requested number of days (or hours) to your pool of available days (or hours) for the chosen absence type. You can then use those days (or hours) to book absence in the Absence Requests tab.

Delete an Allowance Request

Use these steps to delete an allowance request.

To delete an allowance request:

1. Go to **Absence workspace » Allowance Requests tab**
2. On the line you want to delete, click **Row Tools » Delete Request**.
Maconomy deletes the line, and automatically refreshes the workspace.

Employee Record

The Employee Record workspace lets you review and update your own data.

Employee Record Concepts

Use the various tabs of the Employee Record workspace to view and/or make changes to your personal data. Specifically, you can update the following:

- Preferred name
- Contact information
- Bank details
- List of skills
- Emergency contacts
- Parental status
- Education and qualifications
- Work eligibility

Employee Record Fields

This section describes the fields and actions on the Employee Record workspace.

Card Part Fields

Field	Description
Employee Name	This field displays your employee name.
Employee No.	This field displays your employee number.

Employment Island

Field	Description
Position	This field displays your position/job title.
Company	These fields display the name and number of the company in which you are employed.
Location	This field displays the specified value for the Location dimension, if applicable.


Related Employees Island

Field	Description
Supervisor	This field displays the name and employee number of your manager.
Secretary	This field displays the name and employee number of the secretary to whom you are assigned.
Absence Approver	This field displays the name and number of the employee responsible for approving your absences.

Address Island

Field	Description
Name 2-4	These fields display your address. Update the information as needed.
Zip Code	This field displays the zip code of the postal district for your address. Update the information as needed.
Postal District	This field displays the postal district of your address. Update the information as needed.
Country	This field displays the country in which you reside. Update the information as needed.
Name 5	This field displays any additional information regarding your address. Update the information as needed.
Phone	This field displays your primary phone number. Update the information as needed.
E-mail	This field displays your work e-mail address.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.


Emergency Contacts Tab






This section describes the fields and actions on the Emergency Contacts tab of the Employee Record workspace.

Tab Fields

Field	Description
Dependent	When you add an emergency contact, select this check box if the person is your dependent.
Emergency Contact	Select this check box if the person is your emergency contact.
Name	In this field, enter the emergency contact's name.
Address 1-4	In these fields, enter the emergency contact's address.
Zip Code	In this field, you can enter the zip code of the postal district for your emergency contact's address.
Postal District	In this field, you can specify the postal district for your emergency contact's address.
Country	In this field, you can specify the country where your emergency contact resides.
Home Phone	In this field, you can specify your emergency contact's home phone number.
Mobile Phone	In this field, you can specify your emergency contact's mobile phone number.
Email	In this field, you can specify your emergency contact's e-mail address.
Relationship	In this field, enter the emergency contact's relationship to you.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Emergency Contacts tab, choose from the following actions:</p> <ul style="list-style-type: none"> ■ Insert Emergency Contact ■ Delete Emergency Contact

Button	Description
+ Add Emergency Contact	Click this action to add another emergency contact to your list.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.


Parental Status Tab

This section describes the fields and actions on the Parental Status tab of the Employee Record workspace.

Tab Fields

Field	Description
Parental Status Type	Select one of the following values from the drop-down list: <ul style="list-style-type: none"> Solo Parent With Spouse <p>Companies set up the options that appear in the drop-down list. Define values for the Parental Status popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.</p>
Description	In this field, enter additional information about your parental status. This is a free-text field.

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record.

Button	Description
	For lines in the Parental Status tab, choose from the following actions: <ul style="list-style-type: none"> Insert Parental Status Delete Parental Status
+ Add Parental Status	Click this action to update your personal information with your parental status.

Education and Qualifications Tab


This section describes the fields and actions on the Education and Qualifications tab of the Employee Record workspace.

Tab Fields

Field	Description
Country	Choose the country where you obtained the qualification from the drop-down list.
Qualification Type	Choose the type of qualification from the drop-down list. Companies set up the options that appear in the drop-down list. Define values for the Qualification Type popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.
Qualification Suffix	Enter the qualification suffix.
Education Institution	Choose the institution where you received your qualification from the drop-down list. Companies define their own values for this drop-down list, with the options changing depending on the country specified in the Country field. You can also type in the name of the institution.
Education Subject	Enter the subject in which you received your qualification.
Qualification Level	Choose your qualification level from the drop-down list. Companies set up the options that appear in the drop-down list. Define values for the Qualification Level popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.
Qualification Date	Click the calendar icon to choose the date on which you became qualified.
Expiry Date	Click the calendar icon to choose the date on which this qualification expires.

Field	Description
Document Check Date	Click the calendar icon to choose the date on which your education and qualifications document was checked.
Document Check Person Empl. No.	Choose the employee number of the person who performed the document check from the drop-down list. If you specify a value here, Maconomy auto-populates the Document Check Person field (and vice versa).
Document Check Person	Choose the name of the employee who performed the document check from the drop-down list. If you specify a value here, Maconomy auto-populates the Document Check Person Empl. No. field (and vice versa).
Qualification Held	This field calculates and displays the number of years you have had this qualification.

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Education and Qualifications tab, choose from the following actions: <ul style="list-style-type: none"> ▪ Insert Education and Qualification ▪ Delete Education and Qualification
+ Add Education and Qualification	Click this action to add to your list of educational qualifications.

Work Eligibility Tab


This section describes the fields and actions on the Work Eligibility tab of the Employee Record workspace.

Tab Fields

Field	Description
Eligibility Country	This field displays the country in which you are eligible to work.
Eligibility Status	Choose your eligibility status from the drop-down list. The values available in the drop-down list are dependent on the Eligibility Status option list specified for the country you selected in the Eligibility Country field.

Field	Description
Eligibility Type	Choose your eligibility type from the drop-down list. Companies set up the options that appear in the drop-down list. Define values for the Eligibility Type popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.
Eligibility Document	Choose your eligibility document from the drop-down list. The values available in the drop-down list are dependent on the Eligibility Document option list specified for the country you selected in the Eligibility Country field.
Document Number	In this field, enter the document number for your eligibility document.
Start Date	Click the calendar icon to choose the date when your eligibility period begins.
Expiry Date	Click the calendar icon to choose the date when your eligibility period begins.
Issuer	In this field, enter the name of the organization that issued your eligibility document.
Issuing Sponsor	In this field, enter the name of the sponsor who issued your eligibility document.
Document Check Date	Click the calendar icon to choose the date on which your eligibility document was checked.
Document Check Person No.	In this field, choose the employee number of the person who performed the document check from the drop-down list. If you specify a value here, Maconomy auto-populates the Document Check Person field (and vice versa).
Document Check Person	In this field, choose the name of the employee who performed the document check from the drop-down list. If you specify a value here, Maconomy auto-populates the Document Check Person No. field (and vice versa).

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Work Eligibility tab, choose from the following actions: <ul style="list-style-type: none"> ■ Insert Work Eligibility ■ Delete Work Eligibility
+ Add Work Eligibility	Click this action to add to your work eligibility information.


Employee Skills Tab

This section describes the fields and actions on the Employee Skills tab of the Employee Record workspace.

Tab Fields

Field	Description
Skill Type	<p>This field displays the classification of the specified skill. Examples of skill types are Languages, Travel Preferences, or Technical.</p> <p>Companies set up all skill-related information in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for the Skill No. field, Maconomy auto-populates this field with the corresponding skill type.</p>
Skill No.	<p>Choose the skill number from the drop-down list.</p> <p>Companies set up the values that appear in the drop-down list (and other skill-related information) in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for this field, Maconomy auto-populates the Skill Type and Skill Name fields.</p>
Skill Name	<p>This field displays the name of the skill that is associated with the specified skill number.</p> <p>Companies set up all skill-related information in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for the Skill No. field, Maconomy auto-populates this field with the corresponding skill name.</p>
Level	<p>Choose your proficiency level in this skill from the drop-down list.</p> <p>If automatic level specification is enabled in the Skills single dialog in the Workspace Client, Maconomy auto-populates this field.</p>
Skill Acquired	Click the calendar icon to choose the date on which you acquired this skill.
Level Acquired	Click the calendar icon to choose the date on which you attained the level you specified for this skill.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Employee Skills tab, the following action is available:</p> <ul style="list-style-type: none"> ■ Delete Employee Skill
+ Add Employee Skill	Click this action to add to your list of skills.

Employee Record Procedures

This section describes the steps you need to follow to update your personal data.

Use the Maconomy Employee Record workspace to do the following:

Update Your Information

Use these steps to update your personal data.

To update your personal information:

1. Go to the Employee Record workspace.
2. Update the card fields as needed.
3. Click **Save** or press ENTER.
4. If you need to make changes in any of the tabs, navigate to a specific tab.
5. To add line information, click the **+ Add...** action.
6. Fill out the line fields as needed.
7. Click **Save** or press ENTER.
8. To edit existing line information, click a line field and edit as needed.
9. Click **Save** or press ENTER.

The Employee Dashboard

The Employee Dashboard workspace highlights an employee's key performance indicators (KPI).

Employee Dashboard Concepts

This workspace also displays a graph related to employee utilization, such as billable and productive time. By default, billable and productive hours are determined by assigning an employee utilization level to a time activity on a registered job entry, such as billable time and productive time. You can create these employee utilization level types in the Popup Fields reference workspace.

Absence statistics are also displayed in this workspace. Additionally, you can use selection criteria to filter to a specific month and year to view data for that time. You can also customize the layout to add From and To Date fields to the selection criteria to further specify what data you would like to view.

This workspace displays the data of the currently logged in user only. You cannot choose to view any other employee's information in this workspace.

This workspace is listed under the Self Service section in the web client.

Employee Dashboard Fields

This section describes the fields and actions on the Dashboard workspace. .

Card Part Fields

Field	Description
Employee Name	This field displays the name of the employee.
Employee Number	This field displays the number of the employee.

Selection Criteria Panel

Field	Description
Month	Select the appropriate month range to display your data for the specified time interval, beginning from and including the first day of the start month up to and including the last day of the end month.
Year	Select the appropriate year range to display your data for the specified time interval, beginning from and including the first day of the start year up to and including the current day of the current year.


KPI Boxes

Field	Description
Billable Utilization	<p>This box displays the billable utilization of an employee represented as a percentage based on your chosen selection criteria.</p> <p>By default, this is computed as follows:</p> <p>The registered job entries assigned a time activity which has an employee utilization that is billable divided by all registered job entries assigned a time activity.</p> <p>You can customize this according to your needs.</p>
Productive Utilization	<p>This box displays the productive utilization of an employee represented as a percentage based on your chosen selection criteria.</p> <p>By default, this is computed as follows:</p> <p>The registered job entries assigned a time activity which has an employee utilization that is productive divided by all registered job entries assigned a time activity.</p> <p>You can customize this according to your needs.</p>

Charts

Field	Description
Utilization by Month	This chart displays the employee's billable and productive utilization for the months indicated in the selection criteria.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.

Absence Status Tab

This section describes the fields and actions on the Absence Status tab of the Employee Dashboard workspace.

Field	Description
Allowance	<p>This portion shows the time that has been granted for absence bookings up to the end date of the specified period in the selection criteria, broken down according to the following:</p> <ul style="list-style-type: none"> ■ Illness ■ Leave ■ Vacation ■ Time in Lieu <p>These numbers do not change as you book absences. It only changes if your manager changes your allowance.</p>
Carried Forward	<p>This portion shows time that is carried forward from another absence period for each absence type, up to the end date of the specified period in the selection criteria, broken down according to the following:</p> <ul style="list-style-type: none"> ■ Illness ■ Leave ■ Vacation ■ Time in Lieu
Available	<p>This portion shows how much time you have left for booking up to the end date of the specified period in the selection criteria for the vacation period, broken down according to the following:</p> <ul style="list-style-type: none"> ■ Illness

Field	Description
	<ul style="list-style-type: none"> Leave Vacation Time in Lieu <p>It uses this formula: Available = Allowance + Carried Forward (to this period) - Booked - Carried Forward To Following Period.</p> <div> Note: There is no field to show the last term. </div> <p>For example, if you started the period with 25 days of allowance, but then booked 5 days of vacation, this number shows 20.</p>
Booked	<p>This portion shows time that is planned, approved, and scheduled up to the end date of the specified period in the selection criteria, broken down according to the following:</p> <ul style="list-style-type: none"> Illness Leave Vacation Time in Lieu

Approvals

This section covers conceptual information, procedures, and field descriptions for all approval and approval-related workspaces.

Approval Center

The Approval Center workspace allows you to approve or reject approval items from within Maconomy.

Approval Center Concepts

Approval items are those for which approval hierarchies are set up in the Workspace Client. Specifically, you can approve/reject the following:

- Time sheets
- Time sheet lines
- Expense and mileage sheets
- Expense and mileage sheet lines
- Purchase orders
- Purchase order lines
- Vendor invoices
- Vendor invoice allocation lines
- Job invoice drafts
- Jobs
- Job budgets
- Job quotes
- Employees
- Customers/company customers

This workspace supports approvals for project managers and other employee types responsible for approvals (for example, resource managers), and is available in the menu if the user logged in has the requisite access rights (as defined by access groups).

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notifications are included:

- **Approve Time Sheet** - Appears for the user designated as approver of a weekly time sheet submitted for approval. If the substitute approver approves the weekly time sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet by Type** - Appears for all users assigned the employee type designated as approver of a weekly time sheet submitted for approval. If another approver/substitute approver approves the weekly time sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet (Substitute)** - Appears for the user designated as substitute approver of a weekly time sheet submitted for approval. If the approver approves the weekly time sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a weekly time sheet submitted for approval. If another approver/substitute approver approves the weekly time sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet Line** - Appears for the user designated as approver of a weekly time sheet line submitted for approval. If the substitute approver approves the weekly time sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet Line by Type** - Appears for all users assigned the employee type designated as approver of a weekly time sheet line submitted for approval. If another approver/substitute approver approves the weekly time sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet Line (Substitute)** - Appears for the user designated as substitute approver of a weekly time sheet line submitted for approval. If the approver approves the weekly time sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Time Sheet Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a weekly time sheet line submitted for approval. If another approver/substitute approver approves the weekly time sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet** - Appears for the user designated as approver of an expense sheet submitted for approval. If the substitute approver approves the expense sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet by Type** - Appears for all users assigned the employee type designated as approver of an expense sheet submitted for approval. If another approver/substitute approver approves the expense sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet (Substitute)** - Appears for the user designated as substitute approver of an expense sheet submitted for approval. If the approver approves the

expense sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Expense Sheet by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of an expense sheet submitted for approval. If another approver/substitute approver approves the expense sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet** - Appears for the user designated as approver of a mileage sheet submitted for approval. If the substitute approver approves the mileage sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet by Type** - Appears for all users assigned the employee type designated as approver of a mileage sheet submitted for approval. If another approver/substitute approver approves the mileage sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet (Substitute)** - Appears for the user designated as substitute approver of a mileage sheet submitted for approval. If the approver approves the mileage sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a mileage sheet submitted for approval. If another approver/substitute approver approves the mileage sheet first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet Line** - Appears for the user designated as approver of an expense sheet line submitted for approval. If the substitute approver approves the expense sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet Line by Type** - Appears for all users assigned the employee type designated as approver of an expense sheet line submitted for approval. If another approver/substitute approver approves the expense sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet Line (Substitute)** - Appears for the user designated as substitute approver of an expense sheet line submitted for approval. If the approver approves the expense sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Expense Sheet Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of an expense sheet line submitted for approval. If another approver/substitute approver approves the expense sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet Line** - Appears for the user designated as approver of a mileage sheet line submitted for approval. If the substitute approver approves the mileage sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Mileage Sheet Line by Type** - Appears for all users assigned the employee type designated as approver of a mileage sheet line submitted for approval. If another approver/substitute approver approves the mileage sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet Line (Substitute)** - Appears for the user designated as substitute approver of a mileage sheet line submitted for approval. If the approver approves the mileage sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Mileage Sheet Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a mileage sheet line submitted for approval. If another approver/substitute approver approves the mileage sheet line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order** - Appears for the user designated as approver of a purchase order submitted for approval. If a substitute approver approves the purchase order first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order By Type** - Appears for all users assigned the employee type designated as approver of a purchase order submitted for approval. If another approver/substitute approver approves the purchase order first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order (Substitute)** - Appears for the user designated as substitute approver of a purchase order submitted for approval. If the approver approves the purchase order first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a purchase order submitted for approval. If another approver/substitute approver approves the purchase order first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order Line** - Appears for the user designated as approver of a purchase order line submitted for approval. If the substitute approver approves the purchase order line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order Line by Type** - Appears for all users assigned the employee type designated as approver of a purchase order line submitted for approval. If another approver/substitute approver approves the purchase order line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order Line (Substitute)** - Appears for the user designated as substitute approver of a purchase order line submitted for approval. If the approver approves the purchase order line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Purchase Order Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a purchase order line submitted for approval. If another approver/substitute approver approves the purchase order line

first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Vendor Invoice** - Appears for the user designated as approver of a vendor invoice submitted for approval. If a substitute approver approves the vendor invoice first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Vendor Invoice by Type** - Appears for all users assigned the employee type designated as approver of a vendor invoice submitted for approval. If another approver/substitute approver approves the vendor invoice first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Vendor Invoice (Substitute)** - Appears for the user designated as substitute approver of a vendor invoice submitted for approval. If the approver approves the vendor invoice first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Vendor Invoice by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a vendor invoice submitted for approval. If another approver/substitute approver approves the vendor invoice first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Allocation Line** - Appears for the user designated as approver of an invoice allocation line submitted for approval. If the substitute approver approves the invoice allocation line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Allocation Line by Type** - Appears for all users assigned the employee type designated as approver of an invoice allocation line submitted for approval. If another approver/substitute approver approves the invoice allocation line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Allocation Line (Substitute)** - Appears for the user designated as substitute approver of an invoice allocation line submitted for approval. If the approver approves the invoice allocation line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Allocation Line by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of an invoice allocation line submitted for approval. If another approver/substitute approver approves the invoice allocation line first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Drafts** - Appears for the user designated as approver of a job invoice draft submitted for approval. If the substitute approver approves the job invoice draft first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Drafts by Type** - Appears for all users assigned the employee type designated as approver of a job invoice draft submitted for approval. If another approver/substitute approver approves the job invoice draft first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Invoice Drafts (Substitute)** - Appears for the user designated as substitute approver of a job invoice draft submitted for approval. If the approver approves the job invoice draft first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Invoice Drafts by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a job invoice draft submitted for approval. If another approver/substitute approver approves the job invoice draft first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job** - Appears for the user designated as approver of a job submitted for approval. If a substitute approver approves the job first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job by Type** - Appears for all users assigned the employee type designated as approver of a job submitted for approval. If another approver/substitute approver approves the job first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job (Substitute)** - Appears for the user designated as substitute approver of a job submitted for approval. If the approver approves the job first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a job submitted for approval. If another approver/substitute approver approves the job first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job Budget** - Appears for the project manager of the job to indicate that job budgets are ready for approval. By default, the project manager is assigned as approver. This notification points to the Approval Center workspace.
- **Approve Job Budget By Type** - Appears for the user assigned the employee type as approver, to indicate that job budgets are ready for approval. This is triggered when approval hierarchies are used for job budgets. This notification points to the Approval Center workspace.
- **Approve Job Budget Substitute** - Appears for the user assigned as substitute approver in the approval hierarchy, to indicate that job budgets are ready for approval. This is triggered when approval hierarchies are used for job budgets. This notification points to the Approval Center workspace.
- **Approve Job Budget Substitute By Type** - Appears for the user assigned the employee type specified as substitute approver, to indicate that job budgets are ready for approval. This is triggered when approval hierarchies are used for job budgets. This notification points to the Approval Center workspace.
- **Approve Job Quote** - Appears for the user designated as approver of a job quote submitted for approval. If another approver/substitute approver approves the job quote first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job Quote by Type** - Appears for all users assigned the employee type designated as approver of a job quote submitted for approval. If another approver/

substitute approver approves the job quote first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Job Quote (Substitute)** - Appears for the user designated as substitute approver of a job quote submitted for approval. If another approver/substitute approver approves the job quote first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Job Quote by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a job quote submitted for approval. If another approver/substitute approver approves the job quote first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Employee** - Appears for the user designated as approver of an employee submitted for approval. If a substitute approver approves the employee first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Employee by Type** - Appears for all users assigned the employee type designated as approver of an employee submitted for approval. If another approver/substitute approver approves the employee first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Employee (Substitute)** - Appears for the user designated as substitute approver of an employee submitted for approval. If the approver approves the employee first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Employee by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of an employee submitted for approval. If another approver/substitute approver approves the employee first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Company Customer** - Appears for the user designated as approver of a company customer submitted for approval. If a substitute approver approves the company customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Company Customer by Type** - Appears for all users assigned the employee type designated as approver of a company customer submitted for approval. If another approver/substitute approver approves the company customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Company Customer (Substitute)** - Appears for the user designated as substitute approver of a company customer submitted for approval. If the approver approves the company customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Company Customer by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a company customer submitted for approval. If another approver/substitute approver approves the company customer first, this notification disappears from the list. This notification points to the Approval Center workspace.

- **Approve Customer** - Appears for the user designated as approver of a customer submitted for approval. If a substitute approver approves the customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Customer by Type** - Appears for all users assigned the employee type designated as approver of a customer submitted for approval. If another approver/substitute approver approves the customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Customer (Substitute)** - Appears for the user designated as substitute approver of a customer submitted for approval. If the approver approves the customer first, this notification disappears from the list. This notification points to the Approval Center workspace.
- **Approve Customer by Type (Substitute)** - Appears for all users assigned the employee type designated as substitute approver of a customer submitted for approval. If another approver/substitute approver approves the customer first, this notification disappears from the list. This notification points to the Approval Center workspace.


Approval Center Fields

This section describes the fields and actions on the Approval Center workspace. Regular employees without the requisite permissions do not have access to this workspace or any of its tabs.

Card Part Fields

Field	Description
Job	Specify a job name or number to view only the approval items associated with that job. Note: The drop-down lists include all the jobs to which you have access, not just those for which you have pending approvals.
Show Substitute Lines	Toggle on/off to show/hide the approval items for which you are a substitute approver.
Show Super Approver Lines	Toggle on/off to show/hide the approval items for which you are a super approver.
Show Rejected Lines	Toggle on/off to show/hide rejected approval items.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.

Time Sheets Tab






This section describes the fields and actions on the Time Sheets tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Employee	This field displays the name of the employee who filed the weekly time sheet.
Week	This field displays the week number.
Unit	This field displays the time unit used for filing time (hours or days).
Internal	This field displays the total time registered on internal jobs for the week.
External	This field displays the total time registered on external jobs for the week.
Invoiceable	This field displays the total invoiceable time registered for the week.
Non-Invoiceable	This field displays the total non-invoiceable time registered for the week.
Fixed	This field displays the employee's total of fixed expected working hours (or days) for the week.
Balance	This field displays the balance between fixed expected working hours (or days) and the total hours (or days) registered for the week.
Total	This field displays the sum of invoiceable and non-invoiceable time.
Status	This field displays the time sheet's current approval status.

Field	Description
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view.
	Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Time Sheet Lines Tab



This section describes the fields and actions on the Time Sheet Lines tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.




Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.

Field	Description
Employee	This field displays the name of the employee who filed the weekly time sheet line.
Week	This field displays the week number within which the time sheet line falls.
Job No.	This field displays the number of the job associated with the time sheet line.
Job Name	This field displays the name of the job associated with the time sheet line.
Task	This field displays the title or name of the task for which the employee registered time.
Description	This field displays entry information about the work for which the employee registered time.
Total	This field displays the total hours (or days) worked for the week for the job and task specified on the line.
Invoiceable	If the time registered on the line is invoiceable, this field is selected.
Status	This field displays the line's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.

Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Expense Sheets Tab






This section describes the fields and actions on the Expense Sheets tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	<p>Click this icon to view more information about the approval item specified on the line.</p> <p>The wizard that displays also lets you approve/reject the approval item.</p>
Employee	This field displays the name of the employee who incurred the expenses.
Expense Sheet	This field displays the expense sheet number.
Type	<p>This field displays the type of expense. Possible values are:</p> <ul style="list-style-type: none"> ■ Normal ■ Mileage
From Date	This field displays the start date of the expense sheet.
To Date	This field displays the end date of the expense sheet.
Description	This field displays a brief description of the expenses incurred.
Total Amount	This field displays the currency and total amount of the expenses.
Status	This field displays the expense sheet's current approval status.

Field	Description
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view.
	Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Expense Sheet Lines Tab


This section describes the fields and actions on the Expense Sheet Lines tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.





Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.

Field	Description
Employee	This field displays the name of the employee who incurred the expense specified on the line.
Description	This field displays the entry text provided on the expense sheet line.
Type	This field displays the type of expense. Possible values are: <ul style="list-style-type: none"> Normal Mileage
Job No.	This field displays the number of the job for which the expense was incurred.
Job Name	This field displays the name of the job for which the expense was incurred.
Task	This field displays the description of the task for which the expense was incurred.
Quantity	This field displays the number of units of the activity for which the expense was incurred.
Total Amount	This field displays the currency and total amount of the expense.
Status	This field displays the line's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.
View Receipt	If a receipt is attached to the expense sheet line, click the link in this field to download the file.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.

Button	Description
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.






Purchase Orders Tab

This section describes the fields and actions on the Purchase Orders tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Requisitioner	This field displays the name of the employee who requested the item or service specified on the purchase order.
Purchase Order	This field displays the number of the purchase order.
Vendor	This field displays the name of the vendor who will supply the item/service requested.
Amount	This field displays the currency and total cost of the item/service requested.
Status	This field displays the purchase order's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Purchase Order Lines Tab






This section describes the fields and actions on the Purchase Order Lines tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Requisitioner	This field displays the name of the employee who requested the item or service specified on the purchase order line.
Purchase Order	This field displays the purchase order number.
Job No.	This field displays the number of the job for which the purchase order line was registered.
Job Name	This field displays the name of the job for which the purchase order line was registered.

Field	Description
Task	This field displays the name of the task for which the purchase order line was registered.
Vendor	This field displays the name of the vendor who will provide the item/activity requested.
Line Remarks	This field displays any reasons provided to justify the purchase order.
Quantity	This field displays the number of units of the item/activity requested.
Price	This field displays the currency and total cost of the item/activity requested.
Status	This field displays the line's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Vendor Invoices Tab






This section describes the fields and actions on the Vendor Invoices tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Vendor	This field displays the name of the vendor who provided the item/activity.
Invoice No.	This field displays the invoice number.
Description	This field displays the brief description entered during registration.
Amount Incl. Tax	This field displays the currency and price (including tax/any discounts) of the allocated item/activity.
Due Date	This field displays the date on which payment is due for the vendor invoice.
Purch. Order No.	If the vendor invoice relates to a purchase order placed with the vendor, this field displays the number of that purchase order.
Status	This field displays the vendor invoice's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.
View Invoice	If a copy of the invoice document is attached to the vendor invoice, click the link in this field to download the file to your computer/device.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Invoice Allocation Lines Tab






This section describes the fields and actions on the Allocation Lines tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Vendor	This field displays the name of the vendor who provided the item/activity.
Invoice No.	This field displays the invoice number.
Job No.	This field displays the number of the job to which the cost is allocated.
Job Name	This field displays the name of the job to which the cost is allocated.
Task	If the cost is allocated to a specific task listed under the job, this field displays the name of that task.
Entry Description	This field displays the brief description entered during registration.

Field	Description
Quantity	This field displays the allocated number of units of the item/activity.
Amount Excl. Tax	This field displays the currency and price (less tax/any discounts) of the allocated item/activity.
Status	This field displays the line's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.
View Invoice	If a copy of the invoice document is attached to the vendor invoice, click the link in this field to download the file to your computer/device.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view.
	Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.






Draft Invoices Tab

This section describes the fields and actions on the Draft Invoices tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Job No.	This field displays the number of the job performed.
Job Name	This field displays the name of the job performed.
Payment Customer	This field displays the name of the payment customer who is the receiver of the final invoice. This may not be the same as the delivery customer (the customer on the job).
Blanket Draft	This field is selected if the draft invoice is a blanket draft.
Invoice Type	This field displays the type of invoice. Possible values are: <ul style="list-style-type: none"> ■ T&M ■ On Account ■ T&M and On Account ■ Pre-Invoice
Billing Price	This field displays the currency and total price of the invoice, excluding tax.
Write Up/Down	This field displays the currency and total amount written up/down on the job entries for invoicing, excluding tax.
Status	This field displays the line's current approval status.
View Draft	Click this icon to download the PDF of the draft invoice to your computer/device.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Jobs Tab






This section describes the fields and actions on the Jobs tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Job No.	This field displays the number of the job.
Job Name	This field displays the name of the job.
Job State	This field displays the job's current state. The list of possible values is customized by the company. This field is only relevant if: <ul style="list-style-type: none"> Approval hierarchies are set up to use multiple stage approvals.

Field	Description
	<ul style="list-style-type: none"> The company uses the Job State functionality.
Customer	This field displays the name of the customer for whom the company performed the job.
Project Manager	This field displays the name of the project manager for the job.
Status	This field displays the job's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Job Budgets Tab






This section describes the fields and actions on the Job Budgets tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Job No.	This field displays the number of the job.
Job Name	This field displays the name of the job.
Customer	This field displays the name of the customer for whom the company performed the job.
Project Manager	This field displays the name of the project manager for the job.
Job State	This field displays the job's current state. The list of possible values is customized by the company. This field is only relevant if: <ul style="list-style-type: none"> Approval hierarchies are set up to use multiple stage approvals. The company uses the Job State functionality.
Budget Type	The selected job budget has a type from the list that is setup in the Popup Fields entry for Job Budget Types.
Current Status	This field displays the job budget's current approval status. This can be one of the following: <ul style="list-style-type: none"> Submitted Partly Approved Approved Rejected Released
New Approval Status	This field allows the user to select the state after clicking the Execute Approval button. This is used, instead of the Approve or Reject actions, to change the state of multiple lines. This can be one of the following:

Field	Description
	<ul style="list-style-type: none"> ▪ "" (empty) ▪ Approved ▪ Rejected ▪ Released
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.


Job Quotes Tab





This section describes the fields and actions on the Job Quotes tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver), and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Job No.	This field displays the number of the relevant job.
Job Name	This field displays the name of the relevant job.
Customer	This field displays the name of the customer for whom your company will perform the relevant job.
Project Manager	This field displays the name of the project manager for the relevant job.
Quote Price	This field displays the currency and the price for the job quote.
Status	This field displays the current approval status of the job quote.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.

Button	Description
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Employees Tab






This section describes the fields and actions on the Employees tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.

Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Employee	This field displays the name of the employee for approval.
Position	This field displays the employee's position.
Supervisor	This field displays the name of the employee's supervisor.
Absence Approver	This field displays the name of the designated absence approver for the employee.
Company	This field displays the name of the company to which the employee is assigned. This is relevant for multi-company organizations.
Status	This field displays the employee's current approval status.
Approve	Click this action to approve the line.

Field	Description
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Customers Tab




This section describes the fields and actions on the Customers tab of the Approval Center workspace. If you have no pending items for approval (whether as an approver, substitute approver, or super approver) and no rejected lines for a tab, Maconomy hides the tab.



Tab Fields

Field	Description
View Details	Click this icon to view more information about the approval item specified on the line. The wizard that displays also lets you approve/reject the approval item.
Company Specific	For company customers, this field is selected.

Field	Description
Customer No.	This field displays the customer number.
Customer	This field displays the name of the customer for approval.
Acct. Manager	This field displays the name of the account manager assigned to the customer.
Currency	This field displays the currency used by the customer.
Settling Company	This field displays the number of the company to be used as settling company for the customer.
Customer State	<p>This field displays the customer's current state. The list of possible values is customized by the company.</p> <p>This field is only relevant if:</p> <ul style="list-style-type: none"> Approval hierarchies are set up to use multiple stage approvals. The company uses the Customer State functionality.
Status	This field displays the customer's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>

Button	Description
	
	Click this icon to open the Customize Columns window.






Users Tab

This section describes the fields and actions on the Users tab of the Approval Center workspace.

Tab Fields

Field	Description
Username	Copy to come.
Employee	Copy to come.
Company	Copy to come.
Type	Copy to come.
Valid From	Copy to come.
Valid To	Copy to come.
Password Expiry Date	Copy to come.
Status	This field displays the customer's current approval status.
Approve	Click this action to approve the line.
Reject	Click this action to reject the line.
Undo	Click this action to undo approval/rejection of the line.

Tab Actions

Button	Description
Approve all	Click this action to approve all the lines pending approval that are listed in the tab.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Approval Center Procedures

This section describes the steps you need to follow to work with approval items in the Approval Center workspace.

Use the Approval Center workspace to do the following:

Approve or Reject an Item

Use these steps to approve or reject an approval item.

To approve or reject an approval item:

1. Go to one of the various tabs in the Approval Center workspace.
2. If you need to view more information about the approval item you are reviewing, click the **View Details** icon on the line for that approval item.
3. To approve the item:
 - a) Click the **Approve** icon on the line.
4. To reject the item:
 - a) Click the **Reject** icon on the line.
The Reject Line wizard displays.
 - b) Enter a reason for the rejection. This is a required field.

- c) Click **Reject**.
Maconomy automatically saves your changes, and refreshes the page.
- 5. To undo approval or rejection of an item:
 - a) Click **Undo**.
Maconomy automatically saves your changes. When you refresh the browser page, the approved/reject line is hidden. However, rejected lines remain displayed if you toggle on the **Show Rejected Lines** field.

Approve All Items

You also have the option to approve all the items in a tab.

To approve all items:

1. Go to one of the various tabs in the Approval Center workspace .
2. Click the **Approve All** action.
3. In the confirmation window that displays, click **Approve All**.
Maconomy automatically saves your changes, and refreshes the page.

View a Receipt

You can view receipts attached to approval items in the Expense Sheet Lines tab.

To view a receipt attached to a line:

1. Go to the **Approval Center workspace » Expense Sheet Lines tab**.
2. Click the link in the **View Receipt** field of the line.
The file is downloaded to your computer/device.

View Attachments on a Vendor Invoice

You can view documents attached to approval items.

To view an document attached to a line:

1. Go to **Approval Center workspace » Vendor Invoices tab**, or to **Approval Center workspace » Invoice Allocation Lines tab**.
2. Click the **View Details** icon on a line.
3. In the Documents sub-tab, click the link in the **Document** field of the line.
The file is downloaded to your computer/device.

View Attachment on a Draft Invoice

Approvers can review documents attached to approval items in the Draft Invoices tab.

To view a document attached to a draft invoice:

1. Go to **Approval Center workspace » Draft Invoices tab**.
2. Click the **View Details** icon on a line.
3. In the Documents sub-tab, click the link in the **Document** field of the line.
The file is downloaded to your computer/device.

Absence Approval

This workspace allows managers to easily approve employee absence requests.

Absence Approval Concepts

Managers can view the absence requests pending approval, and review information such as duration of absence, whether or not the absence is submitted for approval, and if the absence information is synchronized with time sheets. They can also approve or reject an absence in this view.

Note: Configuration and back office tasks such as managing absence balances at year end are not supported by the Maconomy web client.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notification is included:

- **Approve Absence** - Appears for the manager to indicate an absence request for approval. The notification points to the relevant request.

Absence Approval Fields

This section describes the fields and actions on the Absence Approval workspace.

Field	Description
Employee Name	This field displays the name of the employee who filed the absence request.
Absence Request Summary	This field contains the absence type and the date range of the absence request.

Status Part Fields




Field	Description
Submitted	This field displays whether the current absence request is submitted.
Approved	This field displays whether the current absence request is approved.
Reopened	This field displays whether the current absence request is reopened.
Rejected	This field displays whether the current absence request is rejected.

Absences Part Fields

Field	Description
Absence Type	This field displays the reason for the absence request, such as vacation or illness.
Duration	<p>When absence was registered in days: This field displays the total number of days spanned by the absence request period (from the first day to the last day, including non-working days). It also displays the time unit used.</p> <p>When absence was registered in hours (only available if you are running Maconomy 2.4 GA or later in the backend): This field displays the total number of working hours spanned by the absence request period (from the first day to the last day), thus making the value the same as that of the Working Time field. It also displays the time unit used.</p>
Working Time	<p>This field displays the total number of working days (or hours) spanned by the absence request period. It also displays the time unit used.</p> <p>If the absence was registered in hours, this field will have the same value as the Duration field.</p>
Remarks	This field displays any remarks added to the absence request.
Rejection Reason	If the current absence request is rejected, This field displays the reason for its rejection.
Synchronized with Time Sheets	This field displays whether time sheet lines have been created automatically upon approval for the entire absence period.
First Day of Absence	This field displays the first day in the range of dates covered by the current absence request.

Field	Description
First Day is Half Day	This field indicates whether the first day of this absence request period is a half day.
Hours, First Day	This field is available only when the absence request for approval was registered in hours. This field displays the number of hours of absence on the first day.
Last Day of Absence	This field displays the last day of the absence period in the current absence request.
Last Day is Half Day	This field indicates whether the last day of the absence request period is a half day.
Hours, Last Day	This field is available only when the absence request for approval was registered in hours. This field displays the number of hours of absence on the last day.

Absence Approval Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Approve	Click this action button to approve an absence request.
Reject	Click this action button to reject an absence request.
Other Actions	In the Absence Approval workspace, this drop-down list includes the following actions: <ul style="list-style-type: none"> ▪ Submit ▪ Reopen

Absence Approval Procedures

This section describes the steps you need to follow to work with absence approval.

Use Maconomy absence approval to do the following:

Approve or Reject an Absence Request

Use these steps to approve or reject an absence request

To approve or reject an absence request:

1. Go to the Absence Approval workspace.
2. Use the search filter and/or the **Search** field to select an absence request for approval. You can also select an absence request from the list of notifications in the top right corner.
3. To approve the request:
 - a) Click **Approve**.
4. To reject the request:
 - a) Click **Reject**.
Maconomy displays the Reject Absence Request wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Allowance Approval

This workspace allows managers to easily approve allowance requests for employees.

Allowance Approval Concepts

Managers can view allowance requests pending approval, and approve/reject them.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notification is included:

- **Approve Absence Allowance** - Appears for the manager to indicate an allowance request for approval. The notification points to the relevant request.

Allowance Approval Fields

This section describes the fields and actions on the Allowance Approval workspace.

Field	Description
Employee Name	This field displays the name of the employee who filed the allowance request.
Allowance Request Summary	This field contains the absence type, the quantity, and time unit of the allowance request.




Status Part Fields

Field	Description
Submitted	This field displays whether the current allowance request is submitted.
Approved	This field displays whether the current allowance request is approved.
Rejected	This field displays whether the current allowance request is rejected.
Rejection Reason	This field displays the reason provided by the approver for the most recent rejection.

Allowance Request Part Fields

Field	Description
Entry Date	This field displays the date on which the allowance request was entered. Maconomy then suggests this to the approver as the "From Date" for the new allowance's validity period.
Absence Type	This field displays the absence type for which the employee is requesting an allowance.
Time Registered	This field displays the number of days (or hours) the employee specified in the allowance request. It also displays the time unit used. During allowance approval, the approver can change the number the employee entered for the Time Registered field, but not the time unit specified.
Reason	This field displays the reason provided by the employee for the allowance request.

Allowance Approval Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Approve	Click this action button to approve an allowance request.
Reject	Click this action button to reject an allowance request.

Allowance Approval Procedures

This section describes the steps you need to follow to work with allowance approval.

Use Maconomy allowance approval to do the following:

Approve or Reject an Allowance Request

Use these steps to approve or reject an allowance request.

To approve or reject an allowance request:

1. Go to the Allowance Approval workspace.
2. Use the search filter and/or the **Search** field to select an allowance request for approval. You can also select an allowance request from the list of notifications in the top right corner.
3. To approve the request:
 - a) Click **Approve**.
Maconomy displays the Approve Allowance Request wizard.
 - b) In the **Valid Till** field, click the calendar icon to specify a date. This is a required field.
 - c) If needed, edit the **Quantity** field. You can edit the number, but not the time unit specified.
 - d) Click **Approve**.

4. To reject the request:
 - a) Click **Reject**.
Maconomy displays the Reject Allowance Request wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Time Sheet Overview

The Time Sheet Overview workspace provides supervisors (or secretaries) with the ability to review the times sheet status of all employees under their supervision.

Time Sheet Overview Concepts

You can:

- View your employees' time sheets for a particular week, including split weeks time sheets.
- View time sheet status to determine whether supervisor action is required.
- View detailed status information in the info bubble, including who created or submitted the time sheet.
- View detailed information regarding a time sheet in the wizard.
- Email employees about time sheets.
- Open an employee's time sheet for editing.

By default, the workspace opens to the date of the previous week and displays time sheets sorted by employee name. All time sheets are read-only, but clicking the **Create/Edit** icon on a line redirects you to the Weekly Time Sheets workspace to create or edit the employee's time sheet.

This workspace supports approvals for project managers and other employee types responsible for time sheet approvals (for example, secretaries), and is available in the menu if the user logged in has the requisite access rights (as defined by access groups). It is listed under the Approvals menu section.

Time Sheet Overview Fields







This section describes the fields and actions on the Time Sheet Overview workspace. Regular employees without the requisite permissions do not have access to this workspace.

Card Part Fields

Field	Description
View Details	Click this icon to view more information about the time sheet specified on the line. The wizard that displays also lets you submit the time sheet, if needed.

Field	Description
Create/Edit	Click this icon to open a time sheet in the Weekly Time Sheets workspace for editing. If the employee has not yet created a time sheet, Maconomy automatically creates one.
Employee	This field displays the name of the employee who filed the weekly time sheet. Click the name to send an e-mail to the employee.
Internal	This field displays the total time registered on internal jobs for the week.
External	This field displays the total time registered on external jobs for the week.
Invoiceable	This field displays the total hours entered in the table that are against billable activities.
Non-Invoiceable	This field displays the total hours entered in the table that are against non-billable activities.
Fixed	This field displays the fixed number of hours as defined by your administrator on the employee card. This may just be for reference, or a separate setting may also require the employee to enter a minimum of the fixed hours before submission.
Balance	This field displays the difference between the number of hours entered by the employee and the Fixed number that is required of them per their employee card.
Total	This field displays the total hours for the week.
Status	This field displays the time sheet line's approval status as follows: <ul style="list-style-type: none"> ■ Open ■ Not Created ■ Due ■ Submitted ■ Approved ■ Partially Approved ■ Rejected
Approve	Click this action to approve the time sheet header.
Reject	Click this action to reject the time sheet header.
Undo	Click this action to undo approval/rejection of the time sheet header.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
Date Range Display	Click this Date Range Display link to access the calendar, then select the appropriate week to view your employees' time sheet information.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Time Sheet Overview Procedures

This section describes the steps you need to follow to work with approval items in the Time Sheet Overview workspace.

Use the Time Sheet Overview workspace to do the following:

Approve or Reject a Time Sheet

Use these steps to approve or reject a time sheet.

Note: The option to reject time sheets is available only when approval hierarchies is enabled.

To approve or reject a time sheet:

1. Go to the Time Sheet Overview workspace.
2. If you need to view more information about the time sheet you are reviewing, click the **Open Time Sheet** icon on the line for that time sheet.

3. To approve the item:
 - a) Click the **Approve** icon on the line.
4. To reject the item:
 - a) Click the **Reject** icon on the line.
The Reject Line wizard displays.
 - b) Enter a reason for the rejection. This is a required field.
 - c) Click **Reject**.
Maconomy automatically saves your changes, and refreshes the page.
5. To undo approval or rejection of an item:
 - a) Click **Undo**.
Maconomy automatically saves your changes.

CRM

This section covers conceptual information, procedures, and field descriptions for all CRM-related workspaces.

Contact Companies

Use this workspace to create and maintain information about your contact companies, such as their business details.

Contact Companies Concepts

You can use this workspace to:

- Create new contact companies to build future business opportunities with.
- Add and view sales opportunities, including an overview of outstanding and closed ones.
- Create and update important sales events and specify contact persons for each event.
- Assign employees to lead sales-related engagements with your contact companies.
- Attach, view, and update documents linked to your contact companies.



Contact Companies Fields


This section describes the fields and actions on the Contact Companies workspace.

Card Part Fields

Field	Description
Contact Company Name	This field displays the name of the contact company. Update the information as needed.

Card Part Actions

Button	Description
+ New Contact Company	Click to create a new contact company.
	Click this icon to refresh data in the current workspace.
	Click to display the list view. Click to display the detailed view.

Button	Description
	
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Create Customer	Click this action to create a customer that will be included in the contact company information
Other Actions	<p>This drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Attach Documents - Click this action to attach documents to the contact company. ▪ Delete Contact Company - Click this action to delete the contact company.

Information Tab

This section describes the fields and actions on the Information tab of the Contact Companies workspace.

Tab Fields

Field	Description
Contact Company	This field displays the name of a contact company. Update the information as needed.
Address	This field displays the complete address of a contact company. Update the information as needed.
Sales Person	This field displays the name of the sales person assigned to the contact company. Update the information as needed.
Company	This field displays the name of the company. Update the information as needed.
Customer	This field displays the name of a customer, and only appears if a customer based on the contact company was created. Update the information as needed.







Contact Persons Sub-Tab

This section describes the fields and actions on the Contact Persons sub-tab of the Contact Companies workspace.

Sub-Tab Fields

Field	Description
Name	This field displays the name of a contact person for the current contact company. Update the information as needed.
Position	This field displays a contact person's position. Update the information as needed.
Phone	This field displays a contact person's phone number. Update the information as needed.
Email	This field displays a contact person's email address. Update the information as needed.

Sub-Tab Actions

Button	Description
+ Add Contact Person	Click this action to add a contact person to a contact company.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.
	The Row Tools icon allows you to add lines/information to the lines of a record. For contact person lines, choose from the following actions:

Button	Description
	<ul style="list-style-type: none"> ▪ Delete Contact Person - Click this action to delete the contact person from the contact company. ▪ Revert - This action appears when you are adding a new contact person and allows you to undo your changes.




Employees Sub-Tab




This section describes the fields and actions on the Employees sub-tab of the Contact Companies workspace.

Sub-Tab Fields

Field	Description
Employee No.	Select an employee number from the drop-down list. If you select an employee number, Maconomy auto-populates the Name field.
Name	Select an employee from the drop-down list. If you select an employee, Maconomy auto-populates the Employee No. field.
Role	This field displays the role of an employee in engaging with the current contact company. Update the information as needed.

Sub-Tab Actions

Button	Description
+ Add Employee	Click this action to create and assign an employee to a contact company.
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.

Button	Description
	
	Click this icon to open the Customize Columns window.
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For employee lines, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Delete Contact Company Employee - Click this action to remove the employee from the contact company. ▪ Revert - This action appears when you are adding a new employee to the contact company and allows you to undo your changes.

Opportunities Tab

This section describes the fields and actions on the Opportunities tab of the Contact Companies workspace.

KPI Boxes



Field	Description
Open	This box displays the total number of open opportunities linked with the current contact company.
Won	This box displays the total number of opportunities that were successfully closed and resulted in a sale with the current contact company.
Lost	This box displays the total number of opportunities that were closed but did not result in a sale with the current contact company.





Tab Fields

Field	Description
Opportunity No.	This field displays the identification number of an opportunity. Update the information as needed.
Description	This field displays the description of an opportunity. Update the information as needed.
Contact Company	This field displays the contact company where the opportunity is linked to.

Field	Description
Sales Rep.	This field displays the name of the employee assigned as the sales representative for an opportunity. Update the information as needed.
Sales Estimate	This field displays the estimated value of an opportunity. Update the information as needed.
Probability	This field displays the probability percentage rating for whether the opportunity will result in a sale.
Weighted Sales Estimate	This field displays the weighted value of the opportunity. The value is equivalent to the probability percentage multiplied by the sales estimate.
Expected Closing Date	This field displays the expected date an opportunity will be closed. Click the calendar icon to select or change the date. The date is changed to the actual closing date automatically once you close the opportunity either as won or lost.
Status	This field displays an opportunity's status, which can be any of the following: <ul style="list-style-type: none"> ▪ Open - This status indicates that you can still edit an opportunity and its corresponding details as it develops. ▪ Won - This status indicates that a closed opportunity was successfully settled and resulted in a sale. ▪ Lost - This status indicates that a closed opportunity did not result in a sale. <p>You cannot change the details once an opportunity is closed; however, you can reopen it to make revisions.</p>
Phase	This field displays the current phase of the opportunity. The phase changes as the sale progress.

Tab Actions

Button	Description
+ Add Opportunity	Click this action to create a new opportunity linked to the current contact company.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.

Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For opportunity lines, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Delete Opportunity - Click this action to remove an opportunity. ▪ Revert - This action appears when you are adding a new opportunity and allows you to undo your changes.

Events Tab







This section describes the fields and actions on the Events tab of the Contact Companies workspace

Tab Fields

Field	Description
Description	<p>This field displays the description of an event linked to the current contact company.</p> <p>Update the information as needed.</p>
Contact Mode	<p>This field displays the preferred way to reach out to the current contact company.</p> <p>Update the information as needed.</p>
Contact Person	<p>This field displays the name of the contact person for the event.</p> <p>Update the information as needed.</p>
Employee	<p>This field displays the name of the employee who is the main contact for the event.</p> <p>Update the information as needed.</p>
Planned Starting Date	<p>This field displays the date when an event is estimated to begin. Click the calendar icon to select or change the date.</p>

Field	Description
Planned Ending Date	This field displays the date when an event is estimated to end. Click the calendar icon to select or change the date.

Tab Actions

Button	Description
+ Add Event	Click this action to create a new event linked to the current contact company.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.
	The Row Tools icon allows you to add lines/information to the lines of a record. For event lines, choose from the following actions: <ul style="list-style-type: none"> ▪ Delete Event - Click this action to remove the event. ▪ Revert - This action appears when you are adding a new event and allows you to undo your changes.

Documents Tab







This section describes the fields and actions on the Documents tab of the Contact Companies workspace

Tab Fields

Field	Description
Document	This field displays the name of an attached file, which you can also click to download the attachment.

Field	Description
Document Type	This field displays the document type of the attachment.
Size	This field displays the file size of the attachment.
Remarks 1	This field displays a description or any notes about the attachment. Update the information as needed

Tab Actions

Button	Description
Attach Documents	Click this action to attach a document to the current contact company.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.
	The Row Tools icon allows you to add lines/information to the lines of a record. For document lines, choose from the following actions: <ul style="list-style-type: none"> ▪ Update Document - Click this action to change the attachment. ▪ Delete Document - Click this action to remove the attachment.

Contact Companies Procedures

This section describes the steps you need to follow to work with contact companies

Create a Contact Company

Once you identify key companies you like to be in business with, you can start recording their initial details in the Contact Companies workspace. Use these steps to add a new contact company.

To create a contact company:

1. Under the CRM menu section, go to **Contact Companies**.
2. Click **+ New Contact Company**.
The New Contact Company wizard displays.
3. Enter a contact company name.
4. Enter the complete address, including the zip code, postal district, and country.
5. Enter a phone number.
6. Enter an email address.
7. Select a sales person.
8. Select a company.
9. Click **Create**.
Maconomy automatically navigates to the contact company you just created.

Create a Customer

Use these steps to add a new customer based on the contact company.

To create a customer:

1. Under the CRM menu section, go to **Contact Companies**.
2. Use the search filter and/or the **Search** field to select a contact company.
3. Click **Create Customer**.
A confirmation window displays. After you proceed, a customer is added in the contact company's information.

Create a Contact Person

You can include the contact information of key people you will reach out to in a contact company's record.

To create a contact person:

1. Under the CRM menu section, go to **Contact Companies » Information tab**.
2. Use the search filter and/or the **Search** field to select a contact company.
3. Click the Contact Persons sub-tab.
4. Click **+ Add Contact Person**.
A new contact person line appears.

5. Enter the name of the new contact person.
6. Enter the contact person's position or select an option from the drop-down list.
7. Enter a phone number.
8. Enter an email address.
9. Click **Save**.

Add an Employee to a Contact Company

Use these steps to designate existing employees to manage your company's interactions with current and potential customers.

To add an existing employee to a contact company:

1. Under the CRM menu section, go to **Contact Companies » Information tab**.
2. Use the search filter and/or the **Search** field to select a contact company.
3. Click the Employees sub-tab.
4. Click **+ Add Employee**.
A new employee line appears.
5. Select either an employee number or an employee name from the drop-down lists.
If you select an employee number, Maconomy auto-populates the **Name** field (and vice versa).
6. Enter the role of the employee in the customer engagement.
7. Click **Save**.

Add an Opportunity

Use these steps to easily track past, ongoing, and future opportunities with your customers in the Opportunities tab of the Contact Company workspace.

To add an opportunity:

1. Under the CRM menu section, go to **Contact Companies » Opportunities tab**.
2. Use the search filter and/or the **Search** field to select a contact company.
3. Click **+ Add Opportunity**.
4. Enter an opportunity number.
5. Enter a description.
6. In the **Sales Rep.** field, select an employee from the drop-down list.
7. Enter the estimated value of the opportunity.
8. Enter the probability percentage of the opportunity to result in a sale.
9. In the **Expected Closing Date** field, click the calendar icon to specify the date you expect to close the opportunity.
10. Click **Save**.

Add an Event

As your company's relationship with a customer progress, you can log your activities with them in the Events tab of the Contact Companies workspace. For example, you want to record a discovery call, including who took the call for your company and who they reached out to.

To add an event:

1. Under the CRM menu section, go to **Contact Companies » Events tab**.
2. Use the search filter and/or the **Search** field to select a contact company.
3. Click **+ Add Event**.
A new event line appears.
4. Enter a description.
5. In the **Contact Mode** field, select the preferred way to connect with the customer from the drop-down list.
6. In the **Contact Person** field, select a contact person from the drop-down list.
7. In the **Employee** field, select an employee from the drop-down list.
8. In the **Planned Starting Date** field, click the calendar icon to specify the target start date.
9. In the **Planned Ending Date** field, click the calendar icon to specify the target end date.
10. Click **Save**.

Attach a Document

Use these steps to upload and attach documents to a contact company record.

To attach a document:

1. Under the CRM menu section, go to **Contact Companies » Documents tab**.
2. Use the search filter and/or the **Search** field to select a contact company.
3. Click **Attach Documents**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select a file that you want to upload.
6. Click **Ok**.
7. In the **Remarks 1** field, enter notes about the attachment, if any.
8. Click **Save**.

Opportunities

Use this workspace to manage your company's sales opportunities.

Opportunities Concepts

You can use this workspace to:

- Create new sales opportunities and link these to a contact company.
- Enter and edit the information about your opportunities, including sales estimates.
- Add contact persons for each opportunity and assign roles to employees for each sales activity.
- Settle and close each opportunity that you won or lost.
- Enter information about events related to your sales activities.
- Create and recalculate the budgets for your opportunities.
- Attach, view, and update documents.




Opportunities Fields

This section describes the fields and actions on the Opportunities workspace.

Card Part Fields

Field	Description
Opportunity Name	This field displays the name of a sales opportunity. Update the information as needed.

Card Part Actions

Button	Description
+ New Opportunity	Click to create a new sales opportunity.
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action to undo changes made to the current record, or to any of its lines.
Close as Won	Click this action if the opportunity resulted in a sale.

Button	Description
	<p>When an opportunity is closed as won, the following fields are changed automatically:</p> <ul style="list-style-type: none"> The Probability field is updated to 100. The Status field is updated to Won. <p>Select a closing date to officially close the opportunity, and you must reopen a closed opportunity to make any changes.</p>
Close as Lost	<p>Click this action if the opportunity did not result in a sale.</p> <p>When an opportunity is closed as lost, the following fields are changed automatically:</p> <ul style="list-style-type: none"> The Probability field is updated to 0. The Status field is updated to Lost. <p>Select a closing date to officially close the opportunity, and you must reopen a closed opportunity to make any changes.</p>
Other Actions	<p>This drop-down list includes the following actions:</p> <ul style="list-style-type: none"> Reopen - Click this action to reopen a closed opportunity and make it editable. Attach Documents - Click this action to attach documents to an opportunity. Delete Opportunity - Click this action to delete an opportunity.

Information Tab

This section describes the fields and actions on the Information tab of the Opportunities workspace.

Charts

Field	Description
Probability	<p>This gauge chart displays a sales opportunity's probability percentage to result in a successful sale.</p> <p>If the opportunity was closed as won, the probability percentage changes to 100 automatically.</p>
Estimated Value	<p>This chart displays a comparison between the sales estimate and weighted sales estimate for the current opportunity.</p>

Tab Fields

Field	Description
Status	<p>This field displays an opportunity's status, which can be any of the following:</p> <ul style="list-style-type: none"> ▪ Open - This status indicates that you can still edit an opportunity and its corresponding details as it develops. ▪ Won - This status indicates that a closed opportunity was successfully settled and resulted in a sale. ▪ Lost - This status indicates that a closed opportunity did not result in a sale <p>You cannot change the details once an opportunity is closed; however, you can reopen it to make revisions.</p>
Phase	This field displays the current phase of an opportunity. The phase changes as the sale progress.
Currency	<p>This field displays the currency of the sales opportunity.</p> <p>Update the information as needed.</p>
Probability	<p>This field displays the probability percentage rating for whether the opportunity will result in a sale.</p> <p>Update the information as needed. The value must be between 0 and 100.</p>
Sales Estimate	<p>This field displays the estimated value of the opportunity.</p> <p>Update the information as needed.</p>
Weighted Sales Estimate	This field displays the weighted value of the opportunity. The value is equivalent to the probability percentage multiplied by the sales estimate.
Sales Rep.	<p>This field displays the name of the employee assigned as the sales representative for the current opportunity.</p> <p>Update the information as needed.</p>
Company	This field displays the company responsible for the current opportunity.
Contact Company	<p>This field displays the contact company that the opportunity is linked to.</p> <p>Update the information as needed.</p>
Country	<p>This field displays the country where the contact company is located.</p> <p>Update the information as needed.</p>
Contact Person 1	<p>This field displays the name of the primary contact person.</p> <p>Update the information as needed.</p>
Start Date & Expected Ending Date	Click the calendar icon to select the date you began to work on and expect to close an opportunity.

Field	Description
Closing Date	This field displays the actual date you closed the opportunity.


Contact Persons Sub-Tab






This section describes the fields and actions on the Contact Persons sub-tab of the Opportunities workspace

Sub-Tab Fields

Field	Description
Contact Person No.	This field displays the number associated to the contact person for the current opportunity. If you are adding a new contact person, select the number associated to your contact person from the drop-down list. If you select a contact person number, Maconomy auto-populates the Name field.
Name	This field displays the name of the contact person for the current opportunity. If you are adding a new contact person, select the contact person's name from the drop-down list. If you select a contact person, Maconomy auto-populates the Contact Person No. field
Position	This field displays a contact person's position. If you are adding a new contact person, Maconomy auto-populates this field after you save either the contact person's name or identification number.
Phone	This field displays the phone number of the contact person if it is available. If you are adding a new contact person, Maconomy auto-populates this field after you save either the contact person's name or identification number.
Email	This field displays the email address of the contact person if it is available. If you are adding a new contact person, Maconomy auto-populates this field after you save either the contact person's name or identification number.

Sub-Tab Actions

Button	Description
+ Add Contact Person	Click this action to create a new contact person for the current opportunity.
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.
	Click this icon to export the rows from the current table to a spreadsheet.

Button	Description
	Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For opportunity contact person lines, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Opportunity Contact Person - Click this action to add a new contact person. ▪ Delete Opportunity Contact Person - Click this action to delete a contact person. ▪ Revert - This action appears when you are adding a new opportunity contact person and allows you to undo your changes.

Employees Sub-Tab







This section describes the fields and actions on the Employees sub-tab of the Opportunities workspace

Sub-Tab Fields

Field	Description
Employee No.	<p>This field displays an employee's identification number.</p> <p>If you are adding a new employee to the current opportunity, select the number associated to your employee from the drop-down list. If you select an employee number, Maconomy auto-populates the Name field.</p>
Name	This field displays the name of the employee who is assigned to the sales opportunity.

Field	Description
	If you are adding a new employee to the current opportunity, select an employee from the drop-down list. If you select an employee, Maconomy auto-populates the Employee No. field.
Role	This field displays the role of an employee in the current opportunity. Update the information as needed.

Sub-Tab Actions

Button	Description
+ Add Employee	Click this action to create and assign an employee to the current opportunity.
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.
	This drop-down list includes the following actions: <ul style="list-style-type: none"> ▪ Insert Opportunity Employee - Click this action to add a new employee to the current opportunity. ▪ Delete Opportunity Employee - Click this action to remove the employee from the current opportunity. ▪ Revert - This action appears when you are adding a new opportunity employee and allows you to undo your changes.



Events Tab





This section describes the fields and actions on the Events tab of the Opportunities workspace

Tab Fields

Field	Description
Description	This field displays a description of the current event. Update the information as needed.
Contact Mode	This field displays the preferred method of contact to conduct the event. Update the information as needed.
Contact Person No.	This field displays the identification number of the contact person. Update the information as needed.
Employee Name	This field displays the name of the employee assigned to the current event. Update the information as needed.
Planned Starting Date	This field displays the date when an event is estimated to begin. Click the calendar icon to select or change the date.
Planned Ending Date	This field displays the date when an event is estimated to end. Click the calendar icon to select or change the date.
Status Changing Event	If you select this checkbox, the event becomes a status changing event. You can assign the new status in the New Event Flow Status field.
New Event Flow Status	Select the event flow status for the current event flow.
Closed	If you select this checkbox, you can no longer make any changes to the event.

Tab Actions

Button	Description
+ Add Event	Click this action to create a new event for the current opportunity.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.

Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For event lines, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Delete Event - Click this action to remove an event from the current opportunity. ▪ Revert - This action appears when you are adding a new event and allows you to undo your changes.

Budget Tab

This section describes the fields and actions on the Budget tab of the Opportunities workspace

Tab Fields

Field	Description
Hours	<p>This field displays the estimated number of employee hours spent for the opportunity.</p> <p>The Time field shows the total budgeted hours entered in the Quantity field of all job budget lines in the Time sub-tab.</p> <p>There is no value for the Amount and Total fields because the budget figure for amount activities cannot be estimated in hours</p>
Cost	<p>These fields display the budgeted cost of the jobs.</p> <p>The costs of the time activities, amount activities, and the total of all the job budget lines in the sub-tabs are displayed in the Time, Amount, and Total fields, respectively.</p>
Billing Price	<p>These fields display the billing price of the jobs.</p> <p>The billing prices of the time activities, amount activities, and the total of all the job budget lines in the sub-tabs are displayed in the Time, Amount, and Total fields, respectively.</p>
GM	<p>These fields display the job's budgeted gross margin in the base currency for all time activities, amount activities, and for the whole job.</p>

Field	Description
	The gross margin is equivalent to a job's billing price less the actual cost. It is calculated for a job's time activities, amount activities, and total.
GM %	These fields display the job's budgeted gross margin percent, which is the gross margin percentage of the billing price. The gross margin percent is calculated for the job's time activities, amount activities, and total for the whole job.

Tab Actions

Button	Description
Create Budget	Click this action to copy the budgets of all budget types for the selected template job to the new opportunity budget.
Remove Budget	Click this action to remove a budget from the current opportunity.
Recalculate	Click this action to recalculate the prices for on the budget for the current opportunity.

Full Budget Sub-Tab



This section describes the fields and actions on the Full Budget sub-tab of the Opportunities workspace.



Sub-Tab Fields

Field	Description
Description	This field displays a description about the job budget line. Update the information as needed.
Line Type	This field displays the type of the current job budget line. Update the information as needed. You can select any of the following values: <ul style="list-style-type: none"> Sum/Text Time Outlay Amount Milestone
Task	This field displays the task assigned to the job budget line. Update the information as needed.
Employee Category	This field displays the assigned employee category to the job budget. Update the information as needed.

Field	Description
Qty	This field displays the budgeted quantity for the current job budget line. Update the information as needed.
Cost	This field displays the budgeted cost in the base currency of the job budget line. Update the information as needed.
Total Cost	This field displays the total estimated cost in the base currency of the budget line. The total cost is equivalent to the cost multiplied by the quantity
Billing Price	This field displays the budgeted billing price in the currency of the current job for the budget line. Update the information as needed.
Total Billing Price	This field displays the total budgeted billing price in the job currency for all budget lines. The total billing price is equivalent to the billing price multiplied by the quantity.
Markup	This field displays the budgeted gross margin percent for the job budget line. Update the information as needed.

Sub-Tab Actions

Button	Description
+ Add Job Budget Line	Click this action to add a new line to the current job budget.
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.
← Outdent	Click this action to outdent the current subline, and remove it from under its parent line. Clicking this action takes the subline out of its current hierarchy, and converts it into a normal line.
→ Indent	Click this action to indent the current line, and make it a subline of the parent line immediately above it.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.

Button	Description
	
	Click this icon to open the Customize Columns window.

Time Sub-Tab





This section describes the fields and actions on the Time sub-tab of the Opportunities workspace.

Sub-Tab Fields

Field	Description
Description	This field displays a description about the job budget line. Update the information as needed.
Line Type	This field displays the type of the current job budget line. You can update the information in this field on the Full Budget tab.
Task	This field displays the task assigned to the job budget line. Update the information as needed.
Employee Category	This field displays the assigned employee category to the job budget. Update the information as needed.
Qty.	This field displays the budgeted number of hours for the current job budget line. The value in this field is totaled in the Hours field by the Time field. Update the information as needed.
Cost	This field displays the budgeted quantity for the current job budget line. Update the information as needed.
Total Cost	This field displays the budgeted cost in the base currency of the job budget line.
Billing Price	This field displays the total estimated cost in the base currency of the budget line. The total cost is equivalent to the cost multiplied by the quantity.
Total Billing Price	This field displays the budgeted billing price in the currency of the current job for the budget line. Update the information as needed.
GM	This field displays the total budgeted billing price in the job currency for all budget lines. The total billing price is equivalent to the billing price multiplied by the quantity.

Field	Description
Markup	This field displays the budgeted gross margin percent for the job budget line. Update the information as needed.

Sub-Tab Actions

Button	Description
+ Add Job Budget Line	Click this action to add a new line to the current job budget.
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.
← Outdent	Click this action to outdent the current subline, and remove it from under its parent line. Clicking this action takes the subline out of its current hierarchy, and converts it into a normal line.
→ Indent	Click this action to indent the current line, and make it a subline of the parent line immediately above it.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.





Amount Sub-Tab

This section describes the fields and actions on the Amount sub-tab of the Opportunities workspace.

Sub-Tab Fields

Field	Description
Description	This field displays a description about the job budget line. Update the information as needed.
Line Type	This field displays the type of the current job budget line. You can update the information in this field on the Full Budget tab.
Task	This field displays the task assigned to the job budget line. Update the information as needed.
Employee Category	This field displays the assigned employee category to the job budget. Update the information as needed.
Qty.	This field displays the budgeted quantity for the activity in the current job budget line. The value in this field is totaled in the Hours field by the Time field. Update the information as needed.
Cost	This field displays the budgeted cost for the activity in the current job budget line. Update the information as needed.
Total Cost	This field displays the budgeted cost for the activity in the base currency of the job budget line.
Billing Price	This field displays the total estimated cost of the activity in the base currency of the budget line. The total cost is equivalent to the cost multiplied by the quantity.
Total Billing Price	This field displays the budgeted billing price of the activity in the currency of the current job for the budget line. Update the information as needed.
GM	This field displays the total budgeted billing price of the activity in the job currency for all budget lines. The total billing price is equivalent to the billing price multiplied by the quantity.
Markup	This field displays the budgeted gross margin percent for the job budget line. Update the information as needed.

Sub-Tab Actions

Button	Description
+ Add Job Budget Line	Click this action to add a new line to the current job budget.
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.
← Outdent	Click this action to outdent the current subline, and remove it from under its parent line. Clicking this action takes the subline out of its current hierarchy, and converts it into a normal line.
→ Indent	Click this action to indent the current line, and make it a subline of the parent line immediately above it.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Documents Tab






This section describes the fields and actions on the Documents tab of the Opportunities workspace.

Tab Fields

Field	Description
Document	This field displays the name of an attached file, which you can also click to download the attachment.
Document Type	This field displays the document type of the attachment.
Size	This field displays the file size of the attachment.

Field	Description
Remarks 1	This field displays a description or any notes about the attachment. Update the information as needed.

Tab Actions

Button	Description
Attach Documents	Click this action to attach a document to the current sales opportunity.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Opportunities Procedures

This section describes the steps you need to follow to work with sales opportunities.

Create an Opportunity

Use these steps to enter information about a potential sale.

To To create an opportunity:

1. Under the CRM menu section, go to **Opportunities**.
2. Click **+ New Opportunity**.
The New Opportunity wizard displays.
3. Enter a description of the new sales opportunity.
4. In the **Currency** field, select the currency from the drop-down list.
5. Enter a sales estimate.
6. Enter the probability percentage of the new opportunity to result in a sale.

7. In the **Sales Date & Expected Ending Date** fields, click the calendar icons to select dates.
8. In the **Sales Rep.** field, select a sales representative from the drop-down list.
9. In the **Company** field, select a company from the drop-down list.
10. In the **Country** field, select a country from the drop-down list.
11. Click **Create**.

Close an Opportunity

You can close an opportunity either as won or lost depending on whether it resulted in a sale or not. Once you close an opportunity, you cannot make any changes unless you reopen it.

To close an opportunity:

1. Under the CRM menu section, go to **Opportunities**.
2. Use the search filter and/or the **Search** field to select an opportunity.
3. Click either **Close as Won** or **Close as Lost**.
Select a closing date to officially close the opportunity, and you must reopen a closed opportunity to make any changes.

Reopen an Opportunity

Once an opportunity is closed, you must reopen the opportunity to make any additional changes.

To reopen an opportunity:

1. Under the CRM menu section, go to **Opportunities**.
2. Use the search filter and/or the **Search** field to select a closed opportunity.
3. Click **Other Actions**.
4. Click **Reopen**.

Add a Contact Person

Use these steps to include information about your important contacts for all your sales opportunities.

To add a contact person:

1. Under the CRM menu section, go to **Opportunities » Information tab**.
2. Use the search filter and/or the **Search** field to select a closed opportunity.
3. Click the Contact Persons sub-tab.
4. Click **+ Add Contact Person**.
A new contact person line appears.
5. Select the contact person's identification number or name.

6. Click **Save**.
The position, phone number, and email address of the contact person are automatically filled in if available.

Add an Employee

You can assign employees to work on specific sales opportunities.

To add an employee:

1. Under the CRM menu section, go to **Opportunities » Information tab**.
2. Use the search filter and/or the **Search** field to select a closed opportunity.
3. Click the Employees sub-tab.
4. Click **+ Employee**.
A new employee line appears.
5. Enter or select an employee number or name from the drop-down list.
6. Enter the role of the employee.
7. Click **Save**.

Add an Event

Use these steps to add important events to your opportunities throughout the sales process.

To add an event:

1. Under the CRM menu section, go to **Opportunities » Events tab**.
2. Click **+ Add Event**.
A new event line appears.
3. Enter a description for the event.
4. Enter the preferred contact mode.
5. In the **Contact Person No.** field, select a contact person identification number from the drop-down list.
6. In the **Employee Name** field, select an employee from the drop-down list.
7. In the **Planned Starting Date** field, click the calendar icon to select a date.
8. In the **Planned Ending Date** field, click the calendar icon to select a date.
9. If the event is a status changing event, select the **Status Changing Event** checkbox.
10. In the **New Event Flow** field, select an event flow from the drop-down list.
11. Select the **Closed** checkbox if you want no changes to be made to the event.
12. Click **Save**.

Create a Budget

Use these steps to copy detailed budgets from template jobs to your open sales opportunities

To create a budget:

1. Under the CRM menu section, go to **Opportunities » Budget tab**.
2. Use the search filter and/or the **Search** field to select an opportunity.
3. Click **Create Budget**.
4. Select a template job.
5. Click **Create**.
This action copies the budgets of the selected template job to the new opportunity budget.

Remove a Budget

Use these steps to remove a budget from a sales opportunity.

To remove a budget:

1. Under the CRM menu section, go to **Opportunities » Budget tab**.
2. Use the search filter and/or the **Search** field to select an opportunity.
3. Click **Remove Budget**.

Recalculate a Budget

Use these steps to recalculate the estimated budget for a sales opportunity.

To create a budget:

1. Under the CRM menu section, go to **Opportunities » Budget tab**.
2. Use the search filter and/or the **Search** field to select an opportunity.
3. Click **Recalculate**.

Attach a Document

Use these steps to upload and attach documents to a sales opportunity.

To attach a document:

1. Under the CRM menu section, go to **Opportunities » Documents tab**.
2. Use the search filter and/or the **Search** field to select a contact company.
3. Click **Attach Documents**.
4. In the dialog that opens, click **Select files** to open your file explorer.

5. Select a file that you want to upload.
6. Click **Ok**.
7. In the **Remarks 1** field, enter notes about the attachment, if any.
8. Click **Save**.

Pipeline

This workspace shows key numbers from your opportunities, such as your sales estimate for specific periods.

Pipeline Concepts

You can:

- Filter open or closed opportunities according to company, contact company, sales representative, and expected closing date.
- Review the details of open or closed opportunities, such the assigned sales representatives and statuses.
- View the monthly, quarterly, and total sales estimates from your opportunities.
- View sales estimates of your sales representatives.

Pipeline Fields

This section describes the fields and actions on the Pipeline workspace.

Selection Criteria Panel

Use the available criteria to filter the opportunities that Maconomy displays for the contact company you selected. The application filters the opportunities as soon as you change any of the criteria fields.

Field	Description
Company	To show the sales opportunities for a specific company, select a company from the drop-down list.
Contact Company	To show the sales opportunities for a specific contact company, select a contact company from the drop-down list.
Sales Rep.	To show the sales opportunities assigned to a specific salesperson, select a sales representative from the drop-down list.
Expected Closing Date	Click the calendar icons to select the expected closing dates and view sales opportunities in that specific time frame.
Include Open	Select this checkbox to include open opportunities in your search. This checkbox is selected by default.

Field	Description
Include Won	Select this checkbox to include opportunities closed as won in your search. This checkbox is selected by default.
Include Lost	Select this checkbox to include opportunities closed as lost in your search.

KPI Boxes

Field	Description
Total Sales Estimate	This box displays the total sales estimate.
This Quarter	This box displays the total sales estimate for the current quarter.
No. of Opportunities	This box displays the total number of opportunities available in the specified criteria.

Charts





Field	Description
Sales Estimate by Closing Month	This chart displays the monthly sales estimate with a comparison of the weighted sales estimate and total sales.
Sales Estimate by Sales Rep.	This chart displays the weighted sales estimate and total sales of sales representatives.

Opportunities Table Fields

Field	Description
Opportunity No.	This field displays the sales opportunity number.
Description	This field displays a description of a sales opportunity.
Contact Company	This field displays the contact company where the sales opportunity belongs.
Sales Rep.	This field displays the name of the sales representative assigned to the sales opportunity.
Sales Estimate	This field displays the estimated sale from the opportunity.
Probability	This field displays the probability percentage rating for whether the opportunity will result in a sale.

Field	Description
Weighted Sales Estimate	This field displays the weighted value of the opportunity. The value is equivalent to the probability percentage multiplied by the sales estimate.
Estimated Closing Date	This field displays the actual date the opportunity was closed.
Status	This field displays the status of the sales opportunity, which can be any of the following: <ul style="list-style-type: none"> Open Won Lost
Phase	This field displays the current phase of the opportunity. The phase changes as the sale progress.

Opportunities Table Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Jobs

This section covers conceptual information, procedures, and field descriptions for all job and job-related workspaces.

Jobs Submenu

Dashboard

The Dashboard workspace highlights important job-related data for project managers, department or program managers, and other stakeholders.

It shows relevant graphs and key performance indicators (KPI) for the selected job.

Dashboard Concepts

The workspace utilizes a specific layout and displays different data depending on the job type of the selected job. The three job types are:

- Fixed price
- Time and material
- Non-invoiceable

This workspace is listed under the Jobs submenu. It can be viewed by project managers and other users assigned the requisite roles or access rights.




Dashboard Fields

This section describes the fields and actions on the Dashboard workspace.

Card Part Fields

Field	Description
Job	This field displays the name and number of the job you selected.
Company	This field displays the name and number of the company in charge of the job you selected.
Project Manager	This field displays the name and employee number of the project manager for the job you selected.
Invoicing Method	This field displays the invoicing method for the job you selected (either fixed price, or time and material). If you selected a non-invoiceable job, Maconomy does not display this field.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
	Click to display the list view.
	Click to display the detailed view.

Fixed Price Job Dashboard

This section describes the KPI boxes and charts you can view in the Dashboard workspace if you selected a fixed price job.

KPI Boxes

Field	Description
EAC Margin	<p>This box displays the budgeted gross margin represented as a percentage on the fixed price of the job currently selected.</p> <p>The value is computed as follows: $((\text{Fixed Price} - \text{Cost from latest working budget}) / \text{Fixed Price}) * 100$ </p> <p>Maconomy displays the box in a different color, depending on the value shown:</p> <ul style="list-style-type: none"> Green - Above 50% Yellow - Between 25-50% Red - Below 25%
Baseline Deviation, Hours	<p>This box displays the deviation (in hours) from the baseline budget, based on the latest progress evaluation for the job currently selected.</p> <p>If the value is a positive number, Maconomy displays this box in red.</p> <p>If the job currently selected has no baseline budget, Maconomy leaves this box blank.</p>
Customer Balance Due	<p>This box displays the amount due from the customer, in base currency.</p> <p>If the value is a positive number, Maconomy displays the box in red.</p> <p>Otherwise, Maconomy displays the box in green.</p>
Revenue Recognized	<p>This box displays the revenue recognized, in base currency.</p>

Field	Description
Risk Profile	This box displays the overall risk profile level specified for the job currently selected.
Approved Risk Fund	This box displays the sum of costs from budget lines on risk-related tasks, in base currency. This is from the latest approved job budget revision.
Weighted Assigned Risk Fund	This box displays the sum of costs under the Assigned Risk Fund column for all job risk lines entered for the current job in the Job Risk Registers single dialog of the Workspace Client. This is displayed in the base currency specified for the job.
Fixed Price	This box displays the fixed price of the job currently selected, in the currency specified for that job.
Invoiced On Account	This box displays the total amount invoiced on account, in the currency specified for the job currently selected.
Open Billing	This box displays the total open billing price for the job currently selected, in the currency specified for that job.
Completion	This box displays the completion percentage as indicated in the latest approved progress evaluation for the job currently selected.

Charts

Field	Description
Progress	This chart displays Actual, EAC, and Baseline Hours for the job currently selected, based on the progress evaluations created for that job within the last six months. This information is also available in the History tab of the Progress Evaluation workspace.

Time and Material Job Dashboard

This section describes the KPI boxes and charts you can view in the Dashboard workspace if you selected a time and material job.

KPI Boxes

Field	Description
Invoiced Margin	This box displays the gross margin percentage on invoiced entries for the job currently selected. Maconomy displays the box in a different color, depending on the value shown: <ul style="list-style-type: none"> ■ Green - Above 50% ■ Yellow - Between 25-50%

Field	Description
	<ul style="list-style-type: none"> ▪ Red - Below 25%
Open Billing	This box displays the total open billing price for the job currently selected, in the currency specified for that job.
Customer Balance Due	This box displays the amount due from the customer, in base currency. If the value is a positive number, Maconomy displays this box in red. Otherwise, Maconomy displays this box in green.
Write Up/Down	This box displays the amount by which the billing price has been written up or down for the job currently selected, in the currency specified for that job. If the value is a negative number, Maconomy displays the box in red. Otherwise, Maconomy displays the box in green.
Revenue Recognized	This box displays the revenue recognized, in the currency specified for the job currently selected.
Time Pending Approval	This box displays the total registered billing price on time sheets that have been submitted but not transferred for posting, in the currency specified for the job currently selected.
Expenses Pending Approval	This box displays the total registered billing price on expense sheets that have been submitted but not transferred for posting, in the currency specified for the job currently selected.
Mileage Pending Approval	This box displays the total registered billing price on mileage sheets that have been submitted but not transferred for posting, in the currency specified for the job currently selected.

Charts

Field	Description
Progress	This chart displays Actual, EAC, and Baseline Hours for the job currently selected, based on the progress evaluations created for that job within the last six months. This information is also available in the History tab of the Progress Evaluation workspace.
Actuals	This chart displays total cost and revenue for each of the last 12 months.

Non-Invoiceable Job Dashboard

This section describes the KPI boxes and charts you can view in the Dashboard workspace if you selected a non-invoiceable job.

KPI Boxes

Field	Description
Hours Budgeted	This box displays the total number of hours budgeted in the current budget for the job.
Hours Registered	This box displays the total number of hours registered for the job. If the total is greater than the hours budgeted, Maconomy displays the box in red. Otherwise, Maconomy displays the box in green.
Cost Budgeted	This box displays the total cost budgeted in the current budget for the job.
Cost Registered	This box displays the total cost registered for the job. If the total is greater than the cost budgeted, Maconomy displays the box in red. Otherwise, Maconomy displays the box in green.

Charts

Field	Description
Time	This chart displays the total hours budgeted and the total hours registered for the job, broken down by task.
Costs, External	This chart displays the total cost budgeted and the total cost registered for Amount activities related to the job, broken down by task.

Jobs

The Jobs workspace allows you to create and maintain job information.

Jobs Concepts

You can:

- Create jobs or sub-jobs and maintain the relevant master data.
- View and maintain customer, employee, and pricing information.
- Assign employees and favorites to jobs.
- View job entries and invoices issued on the job.
- Create plans for invoicing for each job.
- Attach and maintain documents related to the job.

- Generate reports for jobs, employees, and profitability.
- Filter and view selected jobs using selection criteria.
- View information about open jobs and all pending actions that must be performed before you close the job.

This workspace is listed under the Jobs submenu.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notifications are included:

- **Submit Job** - Appears for the user to indicate the pending submission of jobs. This notification points to the relevant job in the Jobs workspace.
- **Rejected Job** - Appears for the user to indicate that a submitted job has been rejected. This notification points to the relevant job in the Jobs workspace.

Jobs Fields

This section describes the fields and actions on the Job Home workspace.

Card Part Fields




Resourcing island

This island and the fields under it only display if:

- The company-specific **Enable People Planner Web** system parameter is enabled in your Workspace Client application.
- The **Use Imported Budget Line Resource Allocation** job parameter attribute is enabled on the current job.

Field	Description
Budget Type	This field displays the People Planner budget type used for the current job.
Last Sent for Resourcing	This field displays the date and time information about the current job was last sent to People Planner.
Transfer	If this field is set to Yes , Maconomy sends the current job to People Planner when People Planner runs the scheduled background task for importing projects. Update the field value as needed.

Card Part Actions

Button	Description
+ New Job	
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit Job	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow. </div>
Approve Job	Click this action button to approve the current record. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow. </div>
Reject Job...	Click this action button to reject the current record. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies. </div>
Other Actions	In the Job Home workspace, this drop-down list includes the following actions: <ul style="list-style-type: none"> Close Reopen Copy Undo Approval/Reject

Button	Description
	<ul style="list-style-type: none"> ▪ Send for Resourcing - Click this action to send the current job to People Planner. This action only displays if: <ul style="list-style-type: none"> ▪ The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. ▪ The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the current job.

Details Tab






This section describes the fields and actions on the Details tab of the Jobs workspace.

Customer Tab

This section describes the fields and actions on the Customer tab of the Jobs workspace.

Setup of Bill To Customers Island

Actions






Button	Description
+ Add Bill to Customer	Copy to come.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Subjobs Tab

This section describes the fields and actions on the Subjobs tab of the Jobs workspace.

Subjobs Island

Actions


Button	Description
+ Attach Subjob	Copy to come.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.





Tasks Tab

This section describes the fields and actions on the Tasks tab of the Jobs workspace.

Copy to come.

Tab Actions

Button	Description
+ Add Task	Copy to come.
Move up	Click this action to move the current line above the previous line in the table.
Move down	Click this action to move the current line below the next line in the table.
	Click this icon to export the rows from the current table to a spreadsheet.





Button	Description
	Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.


Employees Tab

This section describes the fields and actions on the Employees tab of the Jobs workspace.

Copy to come.

Tab Actions

Button	Description
+ Add Employee	Copy to come.
Move up	Click this action to move the current line above the previous line in the table.
Move down	Click this action to move the current line below the next line in the table.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.






Button	Description
	Click this icon to open the Customize Columns window.

Prices Tab

This section describes the fields and actions on the Prices tab of the Jobs workspace.

Copy to come.

Tab Actions

Button	Description
+ Add Price List Line	Copy to come.
Move up	Click this action to move the current line above the previous line in the table.
Move down	Click this action to move the current line below the next line in the table.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Job Specific Prices Sub-Tab

This section describes the fields and actions on the Job Specific Prices sub-tab of the Jobs workspace.

Copy to come.






Documents Tab

This section describes the fields and actions on the Documents tab of the Jobs workspace.

Tab Fields

Field	Description
Document	This field displays the file name of the document attached to the job. The field is automatically filled in by Maconomy and cannot be changed manually. Click on the file name to download the document.
Type	This field displays the file type/format of the document attached to the job (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the job.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the job.
Changed By	This field displays the name of the last user to upload the file/document to the current job.
Remark	Enter any additional remarks in this field.

Tab Actions

Button	Description
Attach Documents	Click this icon to attach a document to the current job.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.






Invoicing Plan Tab

This section describes the fields and actions on the Invoicing Plan tab of the Jobs workspace.

Copy to come.

Invoicing Plans Island

Actions

Button	Description
+ Add Invoicing Plan Line	Copy to come.
Move up	Click this action to move the current line above the previous line in the table.
Move down	Click this action to move the current line below the next line in the table.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.






Entries Tab

This section describes the fields and actions on the Entries tab of the Jobs workspace.

Copy to come.

Entries Island

Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.





Pending Actions Tab


This section describes the fields and actions on the Pending Actions tab of the Jobs workspace.

Copy to come.

Pending Actions Island

Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.

Button	Description
	Click this icon to open the Customize Columns window.

Jobs Procedures

This section describes the steps you need to follow to work with jobs.

Create a Job

Use these steps to add a new job.

To create a job:

1. Under the Jobs menu section, go to **Jobs > Job Home**.
2. Click **+ New Job**.
The Jobs wizard displays.
3. Select a template job.
4. Click **Continue**.
5. Select a customer. This is a required field.
6. Select a company.
7. Enter a job name.
8. Select a project manager.
9. Select a location.
10. Select a job group.
11. Click **Create**.
Maconomy automatically navigates to the job you just created, and saves your changes.

Edit a Job

Use these steps to edit a job or sub-job.

To edit a job or sub-job:

1. Under the Jobs menu section, go to **Jobs > Job Home**.
2. Select a job from the filter list.
3. Click the tab you want to update.
4. Edit the fields as needed.
5. If you want to revert your changes click **Revert**. Otherwise, click **Save** or press ENTER.

Create a Sub-Job

Use these steps to add a new sub-job in the Sub-Jobs tab.

To create a sub-job:

1. Under the Jobs menu section, go to **Jobs > Job Home > Sub-Jobs tab**.
2. Click **Create New Sub-Job**.
The Create Sub-Job wizard displays.
3. Select a customer. This is a required field.
4. Select a template job.
5. Enter a job number.
6. Enter a job name.
7. Select a project manager.
8. Select a location.
9. Select a job group.
10. Click **Create**.
When a sub-job is created, the Main-Job tab becomes visible. Maconomy automatically navigates to the sub-job you just created within this tab, and saves your changes.

Detach a Sub-Job

Use these steps to remove a sub-job from a main job in the Sub-Jobs tab.

To detach a sub-job:

1. Under the Jobs menu section, go to **Jobs > Job Home > Sub-Jobs tab**.
2. In the table part, select a line.
3. From the row tools, click **Detach Sub-Job**.

Attach Documents to a Job

To add one or more documents to a job, perform an upload in the Documents tab.

To upload one or more documents:

1. Under the Jobs menu section, go to **Jobs sub-menu » Job Home workspace » Documents tab**.
2. Select a job from the filter list.
3. Click **Attach Documents**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the files you want to upload.
6. Click **Open**, or press ENTER.

Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy uploads the file/s and lists them in the Documents tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

View a Document

You can view any document listed in the Documents tab.

To view a document:

1. Under the Jobs menu section, go to **Jobs > Job Home > Documents tab**.
2. Click the link in the **Document** field of the line.
The file is downloaded to your computer/device.

Submit a Job

Use these steps to submit a new or updated job.

To submit a job:

1. Under the Jobs menu section, go to **Jobs » Job Home workspace**.
2. Use the search filter and/or the **Search** field to select a job.
3. Click **Submit Job**.

Approve or Reject a Job

Use these steps to review and approve or reject new/updated job information submitted for your approval. You can also approve (and reject) jobs in the Approval Center workspace.

To approve or reject a job:

1. Under the Jobs menu section, go to **Jobs » Job Home workspace**.
2. Use the search filter and/or the **Search** field to select a job.
3. To approve the job:
 - a) Click **Approve Job**.
4. To reject the job:
 - a) Click **Reject Job....**

Maconomy displays the Reject Line wizard.

- b) Enter a rejection reason. This is a required field.
- c) Click **Reject**.

Close a Job

Use these steps to close a job.

To close a job:

1. Under the Jobs menu section, go to **Jobs submenu» Job Home** .
2. Select a job from the filter list.
3. From the **Other Actions** drop-down list, select **Close Job**.

Note: If you attempt to close a job with activities that must be completed beforehand, Maconomy displays an error message. You can go to the Pending Actions tab for more information regarding the job and its activities that need to be done.

Reopen a Job

Use these steps to reopen a job.

To reopen a job:

1. Under the Jobs menu section, go to **Jobs > Job Home**.
2. Select a job from the filter list.
3. From the **Other Actions** drop-down list, select **Reopen Job**.

Copy a Job

Use these steps to copy a job.

To copy a job:

1. Under the Jobs menu section, go to **Jobs > Job Home**.
2. Select a job from the filter list.
3. From the **Other Actions** drop-down list, select **Copy Job**.

Create a Task

Use these steps to create tasks for the job.

To create tasks:

1. Under the Jobs menu section, go to **Jobs > Job Home > Tasks tab**.
2. Click **Tasks**.

3. Click **+ Add Task**.
4. Enter a task name. This field is required.
5. Enter a task description.
6. If you wish to block the task, select the **Blocked** check box.
7. Select an activity from which the task is derived.
8. If you wish to allow overwriting of activities this task, select the **Overwrite Activity** check box.
9. If you wish to use daily descriptions on this task, select the **Use Daily Descriptions** check box.
10. Click **Save**.

Add an Employee to a Job

Use these steps to add an employee to the job.

To add an employee:

1. Under the Jobs menu section, go to **Jobs > Job Home > Employees tab**.
2. Click **+ Add Employee**.
3. Select an employee number. This is a required field.
4. In the **Valid From** field, click the calendar widget to select a date.
5. In the **Valid To** field, click the calendar widget to select a date.
6. In the **Standard Task** field, select a task to associate with the employee.
7. Click **Save**.

Estimating

In terms of functionality, the Estimating workspace is similar to the Budgeting workspace. What makes the Estimating workspace different is how it lets users view the different budgets for a job.

When you select a job, the workspace displays the default budget for that job; to view another budget, you simply select another budget type from a drop-down. This capability is similar to how users work with job budgets in the Workspace Client, and is especially useful to companies that utilize several types of job budgets, including customized types for specific purposes.

Estimating Concepts

You can:

- Select the job whose budgets you want to view/edit.
- Edit a budget.
- Review and approve budgets.
- Reopen a budget.

- View budget revision history for a selected job.

This workspace is listed under the Jobs submenu.




Estimating Fields

This section describes the fields and actions on the Estimating workspace.

Card Part Fields

Field	Description
Job	This field displays the name and number of the job you selected.
Company	This field displays the name and number of the company in charge of the job you selected.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action to save changes to the current budget. After saving changes, the budget status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action to undo changes made to the current budget, or to any of its lines.

Budget Tab

This section describes the fields and actions on the Budget tab in the Estimating workspace.

After selecting a job and specifying a budget type, use this tab to view details regarding the budget you specified, and edit as needed. If you have the requisite access rights, you can also approve budgets submitted for your review.

Field	Description
Show Budget	Select a job budget type from the drop-down list.

Field	Description
Fixed Price, Time	<p>This field displays the budgeted amount of employee time on a fixed price job, as entered in the sub-tab. This field value is displayed in either days or hours, depending on the specified time unit for the job.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Cost	<p>These fields display the budgeted fixed cost price of the job. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total cost of time activities ▪ Amount - Total cost of amount activities ▪ Total - Total cost of all budgeted lines <p>Note: These fields are shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, these fields are automatically hidden in the tab.</p>
Fixed Price	<p>This field displays the total budgeted fixed billing price based on the job setup.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Gross Margin, Total	<p>This field displays the budgeted gross margin on the job for expenses that are included in the fixed price of the job. This is calculated by subtracting the value in the Fixed Price, Cost field from the Fixed Price, Total field.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Gross Margin %, Total	<p>This field displays the budgeted gross margin represented as a percentage on the fixed price of the job.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
T&M, Time	<p>This field displays the budgeted amount of employee time on a job that is billed separately from the fixed price. The value in this field is displayed either in days or hours, depending on the specified time unit for the job.</p>

Field	Description
	<p>Note: This field is only shown for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Cost	<p>These fields display the budgeted billing prices of the job. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total cost of time activities ▪ Amount - Total cost of amount activities ▪ Total - Total cost of all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
Billing Price	<p>These fields display the budgeted billing prices based on lines created in the sub-tab. Total billing prices are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total billing price for T&M time activities ▪ Amount - Total billing price for T&M amount activities ▪ Total - Total billing price for all T&M budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Gross Margin	<p>These fields display the budgeted gross margin (that is, billing price less cost) on the job for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total budgeted gross margin for all time activities ▪ Amount - Total budgeted gross margin for all amount activities ▪ Total - Total budgeted gross margin for all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Gross Margin %	<p>These fields display the budgeted gross margin represented as a percentage on the job for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total budgeted gross margin % for all time activities ▪ Amount - Total budgeted gross margin % for all amount activities ▪ Total - Total budgeted gross margin % for all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>

Field	Description
Grand Total, Time	<p>This field displays the total budgeted amount of employee time entered in the sub-tab.</p> <p>This field value is displayed in either days or hours, depending on the specified time unit for the job.</p> <p>Note: This field is shown only on a fixed price job where some budget lines are excluded from the fixed price.</p>
Grand Total, Cost	<p>This field displays the total for budgeted costs entered in the sub-tab.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Billing Price	<p>This field displays the total for budgeted billing prices entered in the sub-tab.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Fixed Price	<p>This field displays the total budgeted fixed billing price for the current job.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Gross Margin	<p>This field displays the total budgeted gross margin for budget lines entered in the sub-tab.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Gross Margin %	<p>This field displays the overall budgeted gross margin for budget lines entered in the sub-tab, represented as a percentage on the sum of all fixed and billing prices for the job.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>

Field	Description
Grand Total, Currency, Cost	<p>This field displays the total for budgeted costs entered in the sub-tab, in the job currency.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <div> <p>Note: This field is shown in the tab only when the following criteria are met:</p> <ul style="list-style-type: none"> The job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. The job currency differs from the base currency. </div>
Grand Total, Currency, Billing Price	<p>This field displays the total for budgeted billing prices entered in the sub-tab, in the job currency.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <div> <p>Note: This field is shown in the tab only when the following criteria are met:</p> <ul style="list-style-type: none"> The job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. The job currency differs from the base currency. </div>
Grand Total, Currency, Gross Margin	<p>This field displays the total budgeted gross margin for budget lines entered in the sub-tab, in the job currency.</p> <div> <p>Note: This field is shown in the tab only when the following criteria are met:</p> <ul style="list-style-type: none"> The job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. The job currency differs from the base currency. </div>

Tab Actions

Button	Description
Submit Budget	<p>Click this action button to submit a budget for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.</p> <div> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p> </div>
Approve Budget	Click this action button to approve the current budget.

Button	Description
	<p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Reject Budget...	<p>Click this action button to reject the current budget.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Reopen Budget	Click this action button to reopen an approved budget.
Undo Reject	Click this action button to undo rejection of a budget.
Other Actions	<p>In the Estimating workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Remove All Lines - Click this action button to delete all lines in the sub-tab. ▪ Recalculate Budget - Click this action button to recalculate prices on the budget lines currently displayed. ▪ Copy Budget... - Click this action button to copy the current budget. ▪ Transfer to Quotes - Click this action to create a new quote revision for the job budget you are currently viewing. To view the new quote revision, go to the Quotes workspace.

Full Budget Sub-Tab


This section describes the fields and actions on the Full Budget sub-tab of the Budget tab in the Estimating workspace.

Sub-Tab Fields





Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the task assigned to the budget line.
Line Type	<p>From the drop-down list, select the applicable type of activity for the budget line.</p> <p>In the Full Budget sub-tab, the drop-down list includes the following activity types:</p>

Field	Description
	<ul style="list-style-type: none"> Time Outlay Amount Milestone Sum/Text
Task	From the drop-down list, select the task to which you want to assign the budget line.
Empl. Category	<p>If the current budget line relates to an employee, select the applicable employee category from the drop-down list for this field.</p> <div> <p>Note: This field is not shown for the following types of jobs:</p> <ul style="list-style-type: none"> Those for which the Use Imported Budget Line Resource Allocation job parameter attribute is enabled. Those that utilized detailed time budgeting </div>
Employee	<p>If the current budget line relates to an employee, select the employee name from the drop-down list for this field.</p> <div> <p>Note: This field is not shown for the following types of jobs:</p> <ul style="list-style-type: none"> Those for which the Use Imported Budget Line Resource Allocation job parameter attribute is enabled. Those that utilized detailed time budgeting </div>
Incl. in FP	<p>This check box is selected if the entry that applies to the current job budget line is included in the fixed price of a job.</p> <div> <p>Note: This field is shown only when the current job is a fixed price job that is set up such that there are lines included in the fixed price and other lines not included in the fixed price. This field is editable only if the current job is set up such that inclusion is done by task (for example, controlled by the budget).</p> </div>
Qty.	<p>Enter the budgeted quantity for the current budget line.</p> <div> <p>Note: This field is not editable for all Sum/Text lines.</p> </div>
Cost	<p>Enter the cost for one unit of the activity for the current budget line.</p> <div> <p>Note: This field is not editable for all Sum/Text lines.</p> </div>

Field	Description
Total Cost	<p>This field displays the product of the amount specified in the Cost field multiplied by the number specified in the Qty field.</p> <p>Note: This field is not editable for all Sum/Text lines.</p>
Billing Price	<p>Enter the billing price for the activity on the current budget line.</p> <p>Note: This field is only editable for the following:</p> <ul style="list-style-type: none"> Budget lines on a T&M job Budget lines that are not included in the fixed price where the job is a fixed price job <p>This field is not editable and remains blank for the following:</p> <ul style="list-style-type: none"> Sum/Text lines Budget lines included in the fixed price where the job is a fixed price job
Total Billing Price	<p>This field displays the product of the amount specified in the Billing Price field multiplied by the number specified in the Qty field.</p> <p>Note: This field is not editable and remains blank for the following:</p> <ul style="list-style-type: none"> Sum/Text lines Budget lines included in the fixed price where the job is a fixed price job
GM	<p>This field displays the gross margin. Maconomy calculates the gross margin by subtracting the amount in the Total Cost field from the amount in the Total Billing Price field.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>
Markup	<p>This field displays the markup percentage.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>
	<p>Click the Row Tools icon to perform any of the following actions:</p> <ul style="list-style-type: none"> Insert Budget Line Delete Budget Line

Sub-Tab Actions

Button	Description
+ Add Budget Line	Click this action to add a new line to the current job budget.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Time Sub-Tab


This section describes the fields and actions on the Time sub-tab of the Budget tab in the Estimating workspace.

Sub-Tab Fields


Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.




Field	Description
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the task assigned to the budget line.
Line Type	From the drop-down list, select the applicable type of activity for the budget line. In the Time sub-tab, the drop-down list includes the following activity types: <ul style="list-style-type: none"> Time Sum/Text
Task	From the drop-down list, select the task to which you want to assign the budget line.
Empl. Category	If the current budget line relates to an employee, select the applicable employee category from the drop-down list for this field.

Field	Description
	<p>Note: This field is not shown for the following types of jobs:</p> <ul style="list-style-type: none"> Those for which the Use Imported Budget Line Resource Allocation job parameter attribute is enabled. Those that utilized detailed time budgeting
Employee	<p>If the current budget line relates to an employee, select the employee name from the drop-down list for this field.</p> <p>Note: This field is not shown for the following types of jobs:</p> <ul style="list-style-type: none"> Those for which the Use Imported Budget Line Resource Allocation job parameter attribute is enabled. Those that utilized detailed time budgeting
Incl. in FP	<p>This check box is selected if the entry that applies to the current job budget line is included in the fixed price of a job.</p> <p>Note: This field is shown only when the current job is a fixed price job that is set up such that there are lines included in the fixed price and other lines not included in the fixed price. This field is editable only if the current job is set up such that inclusion is done by task (for example, controlled by the budget).</p>
Qty.	<p>Enter the budgeted number of hours or days (depending on the specified time unit for the job) for the current budget line.</p> <p>Note: This field is not editable for all Sum/Text lines.</p>
Cost	<p>Enter the cost for one unit of the activity for the current budget line.</p> <p>Note: This field is not editable for all Sum/Text lines.</p>
Total Cost	<p>This field displays the product of the amount specified in the Cost field multiplied by the number specified in the Qty field.</p> <p>Note: This field is not editable for all Sum/Text lines.</p>
Billing Price	<p>Enter the billing price for the activity on the current budget line.</p> <p>Note: This field is only editable for the following:</p> <ul style="list-style-type: none"> Budget lines on a T&M job

Field	Description
	<ul style="list-style-type: none"> Budget lines that are not included in the fixed price where the job is a fixed price job <p>This field is not editable and remains blank for the following:</p> <ul style="list-style-type: none"> Sum/Text lines Budget lines included in the fixed price where the job is a fixed price job
Total Billing Price	<p>This field displays the product of the amount specified in the Billing Price field multiplied by the number specified in the Qty field.</p> <p>Note: This field is not editable and remains blank for the following:</p> <ul style="list-style-type: none"> Sum/Text lines Budget lines included in the fixed price where the job is a fixed price job
GM	<p>This field displays the gross margin. Maconomy calculates the gross margin by subtracting the amount in the Total Cost field from the amount in the Total Billing Price field.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>
Markup	<p>This field displays the markup percentage.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>
	<p>Click the Row Tools icon to perform any of the following actions:</p> <ul style="list-style-type: none"> Insert Budget Line Delete Budget Line

Sub-Tab Actions

Button	Description
+ Add Job Budget Line	Click this action to add a new line to the current job budget.
	Click this icon to export the rows from the current table to a spreadsheet.

Button	Description
	Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Amount Sub-Tab


This section describes the fields and actions on the Amount sub-tab of the Budget tab in the Estimating workspace.

Sub-Tab Fields





Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the task assigned to the budget line.
Line Type	From the drop-down list, select the applicable type of activity for the budget line. In the Amount sub-tab, the drop-down list includes the following activity types: <ul style="list-style-type: none"> Outlay Amount Sum/Text
Task	From the drop-down list, select the task to which you want to assign the budget line.
Incl. in FP	This check box is selected if the entry that applies to the current job budget line is included in the fixed price of a job. Note: This field is shown only when the current job is a fixed price job that is set up such that there are lines included in the fixed price and other lines not included in the fixed price. This field is editable only if the current job is

Field	Description
	<p>set up such that inclusion is done by task (for example, controlled by the budget).</p>
Qty.	<p>Enter the budgeted quantity for the current budget line.</p> <p>Note: This field is not editable for all Sum/Text lines.</p>
Cost	<p>Enter the cost for one unit of the activity for the current budget line.</p> <p>Note: This field is not editable for all Sum/Text lines.</p>
Total Cost	<p>This field displays the product of the amount specified in the Cost field multiplied by the number specified in the Qty field.</p> <p>Note: This field is not editable for all Sum/Text lines.</p>
Billing Price	<p>Enter the billing price for the activity on the current budget line.</p> <p>Note: This field is only editable for the following:</p> <ul style="list-style-type: none"> Budget lines on a T&M job Budget lines that are not included in the fixed price where the job is a fixed price job <p>This field is not editable and remains blank for the following:</p> <ul style="list-style-type: none"> Sum/Text lines Budget lines included in the fixed price where the job is a fixed price job
Total Billing Price	<p>This field displays the product of the amount specified in the Billing Price field multiplied by the number specified in the Qty field.</p> <p>Note: This field is not editable and remains blank for the following:</p> <ul style="list-style-type: none"> Sum/Text lines Budget lines included in the fixed price where the job is a fixed price job
GM	<p>This field displays the gross margin. Maconomy calculates the gross margin by subtracting the amount in the Total Cost field from the amount in the Total Billing Price field.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>

Field	Description
Markup	This field displays the markup percentage. Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.
	Click the Row Tools icon to perform any of the following actions: <ul style="list-style-type: none"> Insert Budget Line Delete Budget Line

Sub-Tab Actions

Button	Description
+ Add Job Budget Line	Click this action to add a new line to the current job budget.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Revisions Tab

This section describes the fields and actions on the Revisions tab in the Estimating workspace.

This tab displays all the approved revisions and changes made to the current working budget. This also allows you to print any revision of the working budget. Note that you cannot change any of the fields in this tab. If you are working on a fixed price job, the tab displays separate budget information for expenses that are included in the fixed prices budget (under Fixed Price), and for expenses that are separately billed (under T&M).

Field	Description
Budget Type	This field displays the budget type of the current revision.

Field	Description
Revision No.	This field displays the revision number of the current job budget.
Cost Price, Base	This field displays the budgeted cost of the current revision in the base currency, at the time when the revision was created.
Billing Price, Base	This field displays the budgeted billing price of the current revision in the base currency, at the time when the revision was created.
Date Submitted	This field displays the date the current revision was submitted.
Submitted By	This field displays the name of the employee who submitted the current revision.

Working Budget (Revision No. __) Island

This island displays information about the latest revision of the working budget for the current job.

Field	Description
Fixed Price, Time	<p>This field displays the budgeted amount of employee time on a fixed price job, as entered in the sub-tabs of the Budget tab. This field value is displayed in either days or hours, depending on the specified time unit for the job.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Cost	<p>These fields display the budgeted fixed cost price of the job. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total cost of time activities ▪ Amount - Total cost of amount activities ▪ Total - Total cost of all budgeted lines <p>Note: These fields are shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, these fields are automatically hidden in the tab.</p>
Fixed Price	<p>This field displays the total budgeted fixed billing price based on the job setup.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>






Field	Description
Fixed Price, Gross Margin, Total	<p>This field displays the budgeted gross margin on the job for expenses that are included in the fixed price of the job. This is calculated by subtracting the value in the Fixed Price, Cost field from the Fixed Price, Total field.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Gross Margin %, Total	<p>This field displays the budgeted gross margin represented as a percentage on the fixed price of the job.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
T&M, Time	<p>This field displays the budgeted amount of employee time on a job that is billed separately from the fixed price. The value in this field is displayed either in days or hours, depending on the specified time unit for the job.</p> <p>Note: This field is only shown for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Cost	<p>These fields display the budgeted billing prices of the job. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> Time - Total cost of time activities Amount - Total cost of amount activities Total - Total cost of all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
Billing Price	<p>These fields display the budgeted billing prices based on lines created in the sub-tabs of the Budget tab. Total billing prices are displayed for the following:</p> <ul style="list-style-type: none"> Time - Total billing price for T&M time activities Amount - Total billing price for T&M amount activities Total - Total billing price for all T&M budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Gross Margin	<p>These fields display the budgeted gross margin (that is, billing price less cost) on the job for the following:</p>

Field	Description
	<ul style="list-style-type: none"> ▪ Time - Total budgeted gross margin for all time activities ▪ Amount - Total budgeted gross margin for all amount activities ▪ Total - Total budgeted gross margin for all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Gross Margin %	<p>These fields display the budgeted gross margin represented as a percentage on the job for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total budgeted gross margin % for all time activities ▪ Amount - Total budgeted gross margin % for all amount activities ▪ Total - Total budgeted gross margin % for all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
Grand Total, Time	<p>This field displays the total budgeted amount of employee time entered in the sub-tabs of the Budget tab.</p> <p>This field value is displayed in either days or hours, depending on the specified time unit for the job.</p> <p>Note: This field is shown only on a fixed price job where some budget lines are excluded from the fixed price.</p>
Grand Total, Cost	<p>This field displays the total for budgeted costs entered in the sub-tabs of the Budget tab.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Billing Price	<p>This field displays the total for budgeted billing prices entered in the sub-tabs of the Budget tab.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>

Field	Description
Grand Total, Fixed Price	<p>This field displays the total budgeted fixed billing price for the current job.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Gross Margin	<p>This field displays the total budgeted gross margin for budget lines entered in the sub-tabs of the Budget tab.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Gross Margin %	<p>This field displays the overall budgeted gross margin for budget lines entered in the sub-tabs of the Budget tab, represented as a percentage on the sum of all fixed and billing prices for the job.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Currency, Cost	<p>This field displays the total for budgeted costs entered in the sub-tabs of the Budget tab, in the job currency.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <p>Note: This field is shown in the tab only when the following criteria are met:</p> <ul style="list-style-type: none"> The job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. The job currency differs from the base currency.
Grand Total, Currency, Billing Price	<p>This field displays the total for budgeted billing prices entered in the sub-tabs of the Budget tab, in the job currency.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <p>Note: This field is shown in the tab only when the following criteria are met:</p> <ul style="list-style-type: none"> The job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. The job currency differs from the base currency.

Field	Description
Grand Total, Currency, Gross Margin	<p>This field displays the total budgeted gross margin for budget lines entered in the sub-tabs of the Budget tab, in the job currency.</p> <div> <p>Note: This field is shown in the tab only when the following criteria are met:</p> <ul style="list-style-type: none"> The job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. The job currency differs from the base currency. </div>
Submitted	This field displays the date the latest budget revision was submitted, and the name of the user who submitted it.
Approved	This field displays the date the latest budget revision was approved, and the name of the user who approved it.
Revision No.	This field displays the version number of the latest budget revision.

Tab Actions

Button	Description
Print Budget	Click this action button to print the current budget revision.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Full Budget Sub-Tab

This section describes the fields and actions on the Full Budget sub-tab of the Revisions tab in the Estimating workspace.





Sub-Tab Fields

Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Description	This field displays the description for the job budget line.
Line Type	This field displays the activity type for the job budget line.
Task	This field displays the specified task for the job budget line.
Empl. Category	<p>If the current budget line relates to an employee, this field displays the employee category selected for the budget line.</p> <p>Note: This field is not shown for the following types of jobs:</p> <ul style="list-style-type: none"> Those for which the Use Imported Budget Line Resource Allocation job parameter attribute is enabled. Those that utilized detailed time budgeting
Employee	<p>If the current budget line relates to an employee, this field displays the name of the employee specified for the budget line.</p> <p>Note: This field is not shown for the following types of jobs:</p> <ul style="list-style-type: none"> Those for which the Use Imported Budget Line Resource Allocation job parameter attribute is enabled. Those that utilized detailed time budgeting
Incl. in FP	<p>This check box is selected if the entry that applies to the current job budget line is included in the fixed price of a job.</p> <p>Note: This field is shown only when the current job is a fixed price job that is set up such that there are lines included in the fixed price and other lines not included in the fixed price.</p>
Qty.	This field displays the budgeted quantity for the current budget line.

Field	Description
Cost	This field displays the cost for one unit of the activity for the current budget line.
Total Cost	This field displays the product of the amount specified in the Cost field multiplied by the number specified in the Qty field.
Billing Price	This field displays the billing price for the activity on the current budget line.
Total Billing Price	This field displays the product of the amount specified in the Billing Price field multiplied by the number specified in the Qty field.
GM	<p>This field displays the gross margin. Maconomy calculates the gross margin by subtracting the amount in the Total Cost field from the amount in the Total Billing Price field.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>
Markup	<p>This field displays the markup percentage.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>

Sub-Tab Actions

Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	Click this icon to maximize the table view.
	Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Time Sub-Tab

This section describes the fields and actions on the Time sub-tab of the Revisions tab in the Estimating workspace.





Sub-Tab Fields

Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Description	This field displays the description for the job budget line.
Line Type	This field displays the activity type for the job budget line.
Task	This field displays the specified task for the job budget line.
Empl. Category	<p>If the current budget line relates to an employee, this field displays the employee category selected for the budget line.</p> <p>Note: This field is not shown for the following types of jobs:</p> <ul style="list-style-type: none"> Those for which the Use Imported Budget Line Resource Allocation job parameter attribute is enabled. Those that utilized detailed time budgeting
Employee	<p>If the current budget line relates to an employee, this field displays the name of the employee specified for the budget line.</p> <p>Note: This field is not shown for the following types of jobs:</p> <ul style="list-style-type: none"> Those for which the Use Imported Budget Line Resource Allocation job parameter attribute is enabled. Those that utilized detailed time budgeting
Incl. in FP	<p>This check box is selected if the entry that applies to the current job budget line is included in the fixed price of a job.</p> <p>Note: This field is shown only when the current job is a fixed price job that is set up such that there are lines included in the fixed price and other lines not included in the fixed price.</p>
Qty.	This field displays the budgeted number of hours or days (depending on the specified time unit for the job) for the current budget line.

Field	Description
Cost	This field displays the cost for one unit of the activity for the current budget line.
Total Cost	This field displays the product of the amount specified in the Cost field multiplied by the number specified in the Qty field.
Billing Price	This field displays the billing price for the activity on the current budget line.
Total Billing Price	This field displays the product of the amount specified in the Billing Price field multiplied by the number specified in the Qty field.
GM	<p>This field displays the gross margin. Maconomy calculates the gross margin by subtracting the amount in the Total Cost field from the amount in the Total Billing Price field.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>
Markup	<p>This field displays the markup percentage.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>

Sub-Tab Actions

Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	Click this icon to open the Customize Columns window.

Amount Sub-Tab

This section describes the fields and actions on the Amount sub-tab of the Revisions tab in the Estimating workspace.





Sub-Tab Fields

Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Description	This field displays the description for the job budget line.
Line Type	This field displays the activity type for the job budget line.
Task	This field displays the specified task for the job budget line.
Incl. in FP	<p>This check box is selected if the entry that applies to the current job budget line is included in the fixed price of a job.</p> <p>Note: This field is shown only when the current job is a fixed price job that is set up such that there are lines included in the fixed price and other lines not included in the fixed price.</p>
Qty.	This field displays the budgeted quantity for the current budget line.
Cost	This field displays the cost for one unit of the activity for the current budget line.
Total Cost	This field displays the product of the amount specified in the Cost field multiplied by the number specified in the Qty field.
Billing Price	This field displays the billing price for the activity on the current budget line.
Total Billing Price	This field displays the product of the amount specified in the Billing Price field multiplied by the number specified in the Qty field.
GM	<p>This field displays the gross margin. Maconomy calculates the gross margin by subtracting the amount in the Total Cost field from the amount in the Total Billing Price field.</p> <p>Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.</p>
Markup	This field displays the markup percentage.

Field	Description
	Note: This field is hidden for lines included in the fixed price where the job is a fixed price job.

Sub-Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Estimating Procedures

This section describes the steps you need to follow to work with budgets using the Estimating workspace.

Edit a Budget

You can edit a budget to add or modify information regarding your expenses on the job. However, if it has already been submitted or approved, the budget will be reopened and will go through the approval process again.

To edit budget lines:

1. Under the Jobs menu section, go to **Jobs » Estimating workspace » Budget tab**.
2. Use the search filter and/or the **Search** field to select a job.
3. In the **Show Budget** field, select a job budget type from the drop-down list.
4. Click the sub-tab you want to update.
5. Edit the lines in the table as needed.
6. If you want to revert your changes, click **Revert**. Otherwise click **Save** or press ENTER.

Submit a Budget

When you have finalized all details in the budget, you can submit it for approval.

To submit a budget:

1. Under the Jobs menu section, go to **Jobs » Estimating workspace » Budget tab**.
2. Use the search filter and/or the **Search** field to select a job.
3. Click **Submit Budget**.

Approve or Reject a Budget

Use these steps to review and approve or reject new/updated budgets submitted for your approval. You can also approve (and reject) budgets in the Approval Center workspace.

To approve or reject a budget:

1. Under the Jobs menu section, go to **Jobs » Estimating workspace » Budget tab**.
2. Use the search filter and/or the **Search** field to select a budget.
3. To approve the budget:
 - a) Click **Approve Budget**.
4. To reject the budget:
 - a) Click **Reject Budget....**
Maconomy displays the Reject Line wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Reopen a Budget

To modify information in a budget that has already been submitted, you must reopen it for editing.

To reopen a budget:

1. Under the Jobs menu section, go to **Jobs » Estimating workspace » Budget tab**.
2. Use the search filter and/or the **Search** field to select a job.
3. Click **Reopen Budget**.

Copy a Budget

Use these steps to copy budget lines from a job budget to the job budget you are currently working on.

To copy lines from another budget:

1. Under the Jobs menu section, go to **Jobs » Estimating workspace » Budget tab**.

2. Use the search filter and/or the **Search** field to select a job.
3. In the **Show Budget** field, select a job budget type from the drop-down list.
4. From the Other Actions drop-down list, select **Copy Budget**.
The Copy From Job Budget wizard displays.
5. In the **Copy from Job No.** field, specify the number of the job from which you want to copy lines. You can also select a job from the drop-down list.
6. In the **Copy from Budget** field, select a job budget type from the drop-down list.
7. If needed, specify the following information:
 - a) The revision number from which you want to copy budget lines
 - b) Whether you want to overwrite duplicate lines
 - c) Whether you want to copy new lines only
8. Click **Copy**.
Maconomy copies budget lines from the job you specified, and adds them to the sub-tab of the current budget type/job budget.

Budgeting

The Budgeting workspace allows you to create and revise budgets for the jobs you work on.

This workspace dynamically adapts to the configuration of your job, and displays the Working Budget, Baseline budget, or Contract tabs only if relevant.

Additionally, the Job setup and the budget type determines which budget information is shown in the card and tables. For example, for fixed price projects, the fixed price, as determined in the Contract tab, appears in the budget cards and gross margin calculations are based on the cost in the budget and the fixed price. All billing price information is automatically hidden in the card and table, unless you choose to add a budget line for an item that is excluded from the fixed price budget. For time & material jobs, gross margin calculations are based on the cost and sales on the lines in the budget.

Budgeting Concepts

You can:

- Specify the fixed price of a job in the Contract tab. This is done either as a fixed price budget or a quote, depending on the job setup.
- Work with working budgets and baseline budgets for T&M and fixed price jobs. The fields shown in the cards and the tables adapt to the invoicing method (for example, information about cost and sales prices).
- On fixed price jobs, track budgeted costs and gross margins included or excluded from a fixed price job budget separately.
- On lines included in fixed price, view only the relevant budget fields. The billing price and gross margin fields are automatically hidden.

- Easily view amounts in the relevant currency. The amounts are shown in base currency, but if the currency on the job is different from the base, overall currency amounts are shown dynamically.
- Work with jobs where budget matrix (Detailed Time Budget) is enabled.
- Review and approve budgets.
- View revision history to trace all changes on the budget.
- Filter and view selected job budgets in the list view.

The layout of the workspace dynamically adapts to the configuration of your job, based on the job parameter setup done in the Workspace Client.

The Baseline tab displays only if you enable the **Baseline Comparison** attribute in the **Planning** job parameter.

The Contract tab displays the fixed price budget type, as defined by the **Fixed Price Budget Type** attribute, if you:

- In the **Pricing Principle** job parameter, set the value of the **Invoicing Method** attribute to **Fixed Price**; OR
- For T&M jobs with a cap, in the **Revenue Recognition** job parameter, set the value of the **Handling of Overruns** attribute to **Yes**; OR
- For T&M jobs with a cap, in the **Revenue Recognition** job parameter, set the value of the **Recognize Revenue by Completion Percentage** attribute to **Yes**; AND
- In the **Pricing Principle** job parameter, set the value of the **Fixed Price Basis** attribute to **Budget**.

The Contract tab displays the quote if you set the value of the **Fixed Price Basis** attribute to **Quote**.

For fixed price projects, the fixed price, as determined in the Contract tab, appears in the budget cards with gross margin calculations, based on the cost in the budget and the fixed price from the contact tab. Additionally, all billing price information is automatically hidden in the card and table, unless you choose to add a budget line for an item that is excluded from the fixed price budget.

For time & material jobs, gross margin calculations are based on the cost and sales on the lines in the budget.

The amounts in the card part are shown in base currency, but if the currency on the job is different from the base, overall currency amounts are shown dynamically.

This workspace is listed under the Jobs section of menu.

Budgeting Fields




This section describes the fields and actions on the Budgeting workspace.

Card Part

Field	Description
Job Name	This field displays the job number to which the budget is applied.

Field	Description
Job Number	This field displays the job number to which the budget is applied.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action to undo changes made to the current record, or to any of its lines.

Working Budget Tab

This section describes the fields and actions on the Working Budget tab of the Budgeting workspace.

Use this tab to view details regarding your working budget. Depending on your job setup, certain fields are displayed only when relevant to the current job budget. This budget is also known as the current planning budget in the Workspace Client.

Field	Description
Fixed Price, Time	<p>This field displays the budgeted amount of employee time on a fixed price job, as entered in the sub-tab. The value in this field is displayed either in days or hours, depending on the time unit used on the job.</p> <div style="border: 1px solid #0070c0; padding: 5px; margin-top: 10px;"> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all expenses, such as T&M jobs, this field is automatically hidden in the tab.</p> </div>
Fixed Price, Cost	<p>This field displays the budgeted fixed cost price of the job. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total cost of time activities

Field	Description
	<ul style="list-style-type: none"> ▪ Amount - Total cost of amount activities ▪ Total - Total cost of all budget lines ▪ Total Currency - Total cost of all budget lines in the job currency. This field is shown only when the job currency differs from the base currency. <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price	<p>This field displays the total budgeted fixed billing price based on the job setup. Total fixed price values are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Total - Total budgeted fixed price based on the job setup in the base currency. ▪ Total Currency - Total budgeted fixed price based on the job setup in the job currency. Note that this field is shown only when the job currency differs from the base currency. <p>Note: These fields are shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Gross Margin, Total	<p>This field displays the budgeted gross margin on the job for expenses that are included in the fixed price of the job. This is calculated by subtracting the value in the Fixed Price, Cost field from the Fixed Price, Total field.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Gross Margin %, Total	<p>This field displays the budgeted gross margin represented as a percentage on the fixed price of the job.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
T&M, Time	<p>This field displays the budgeted amount of employee time on a job that is billed separately from the fixed price. The value in this field is displayed either in days or hours, depending on the time unit used on the job.</p> <p>Note: This field is shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>

Field	Description
T&M, Cost	<p>This field displays the budgeted billing prices of the job. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total cost of time activities ▪ Amount - Total cost of amount activities ▪ Total - Total cost of all budget lines ▪ Total Currency - Total cost of all budget lines in the job currency. This field is shown only when the job currency differs from the base currency. <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
Billing Price	<p>This field displays the budgeted billing prices based on lines created in the sub-tab. Total billing prices are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total billing price of T&M time activities ▪ Amount - Total billing price of T&M amount activities ▪ Total - Total billing price of all budget lines ▪ Total Currency - Total billing price of all budget lines in the job currency. This field is shown only when the job currency differs from the base currency. <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Total	<p>This field displays the total of all the budgeted costs and billing prices entered in the sub-tab.</p> <p>Note: This field is shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Total, Currency	<p>This field displays the total of all the budgeted costs and billing prices entered in the sub-tab in the job currency.</p> <p>Note: This field is shown only when the job currency is different from the base currency.</p>
T&M, Gross Margin	<p>This field displays the budgeted gross margin on the job for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total budgeted gross margin for all time activities ▪ Amount - Total budgeted gross margin for all amount activities ▪ Total - Total budgeted gross margin for all budget lines

Field	Description
	<p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Gross Margin %	<p>This field displays the budgeted gross margin represented as a percentage on the job for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total budgeted gross margin % for all time activities ▪ Amount - Total budgeted gross margin % for all amount activities ▪ Total - Total budgeted gross margin % for all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
Grand Total	<p>This field displays the total of all the budgeted costs and billing prices entered in the sub-tab.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Currency	<p>This field displays the total of all the budgeted costs entered in the sub-tab in the job currency.</p> <p>Note: This field is shown in the tab only when the job currency is different from the base currency. It is also shown only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Resource Allocation Complete	<p>Use the radio buttons to indicate whether you are done with resource allocations for the job relevant to the budget you are viewing.</p> <p>If this field is set to Yes, Maconomy updates the existing working budget with quantities, costs, and revenues based on the resource allocations.</p> <p>This field only displays if:</p> <ul style="list-style-type: none"> ▪ The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. ▪ The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget.
Submitted	<p>This field displays the date the current budget was submitted, and the name of the employee who submitted it.</p>

Field	Description
Approved	This field displays the date the current budget was approved, and the name of the employee who approved it.

Tab Actions

Button	Description
Create Working Budget	Click this action button to create a working budget for the job.
Submit Budget	Click this action button to submit a budget for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.
Reject Budget...	Click this action button to reject the current budget. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.
Approve Budget	Click this action button to approve the current budget. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.
Reopen Budget	Click this action button to reopen an approved budget.
Undo Reject	Click this action button to undo rejection of a budget. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.
Resourcing	This drop-down list includes the following actions: <ul style="list-style-type: none"> ▪ Send for Resourcing - Click this action to send the current job budget to People Planner. ▪ Retrieve Resourcing for Forecast - When you click this action, Maconomy retrieves resource allocation information for the current job budget from People Planner. When you click the Resource Forecast icon on a sub-tab line, the Resource Forecast wizard then displays the updated data that Maconomy retrieved from People Planner.

Button	Description
	<p>This drop-down list and the actions in it only display if:</p> <ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget.
Other Actions	<p>In the Budgeting workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> Remove All Lines - Click this action button to delete all lines in the sub-tab. Recalculate Budget - Click this action button to recalculate prices on the budget lines currently displayed. Copy Budget - Click this action button to copy the current budget. Transfer to Quote - Click this action to create a new quote revision for the job budget you are currently viewing. To view the new quote revision, go to the Quotes workspace.


Full Budget Sub-Tab

This section describes the fields and actions on the Full Budget sub-tab of the Working Budget tab in the Budgeting workspace.

Sub-Tab Fields






Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Resource Booking	<p>Click the icon to display the Resource Bookings wizard, which contains the embedded People Planner Budgeting Assistant web component.</p> <p>The Budgeting Assistant web component displays resource planning related specifically to the current budget line.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line.

Field	Description
	<p>For more information about this web component and its related procedures, search on "Budgeting Assistant" in the Deltek People Planner Web Components Guide.</p> <div> <p>Note: While you can view the web components embedded in Maconomy on your tablet, some actions are only available via right-click menus, and the right-click function is not supported on tablets. Deltek recommends that you view these web components on desktop browsers.</p> </div>
	Click this icon to assign skills to the current budget line.
Resource Forecast	<p>Click the icon to display the Resource Forecast wizard, which contains Maconomy data retrieved from People Planner.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line. The current line is not a sum/text line.
Price Breakdown	<p>Click to display the price breakdown of the selected budget line.</p> <div> <p>Note: This field is shown only when the current job uses a budget matrix. When you add hours in the budget matrix, Maconomy creates lines for each utilized resource in the price breakdown wizard that opens. You can modify the details regarding hours and prices for each line.</p> </div>
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the Task assigned to the budget line.
Line Type	<p>Select the applicable type of activity for the budget line. The drop-down list include the following activity types:</p> <ul style="list-style-type: none"> Time Outlay Amount Milestone Sum/Text
Task	Select from the drop-down list which task the budget line should be assigned to.

Field	Description
Employee Category	<p>Select an employee category to the job budget from the drop-down list.</p> <p>Note: This field is shown only when required on a job. If you are working on a job that utilizes employees in a different way, this field is hidden in the sub-tab. For example, if you are working on a job with a budget matrix, which provides employee information on a different level, this field is hidden.</p>
Employee	<p>If the current budget line relates to an employee, select the employee from the drop-down list.</p> <p>Note: This field is shown only when required on a job. If you are working on a job that utilizes employees in a different way, this field is hidden in the sub-tab. For example, if you are working on a job with a budget matrix, which provides employee information on a different level, this field is hidden.</p>
Incl. in FP	<p>This check box is selected if the entry that applies to the line is included in the fixed price of a job.</p> <p>Note: This field is shown only when the current job setup bills items to a fixed price amount.</p>
Quantity	Enter the budgeted quantity for the budget line. For time activities, this field is in hours or days, depending on the time unit on the job.
Cost	Enter the cost of the activity on the budget line.
Total Cost	This field displays the total amount of the Cost multiplied by the number in the Quantity field.
Billing Price	Enter the billing price of the activity on the budget line. The value for non-invoiceable activities must be zero.
Total Billing Price	This field displays the total amount of the Billing Price multiplied by the number in the Quantity field.
Gross Margin	This field displays the gross margin. Maconomy calculates the gross margin by subtracting the cost in the Total Cost field from the billing price in the Total Billing Price field.
Markup	This field displays the markup percentage.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Full Budget sub-tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Budget Line ▪ Delete Budget Line ▪ Revert
+ Add Budget Line	Click this action button to add another budget line to the bottom of the budget.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	Click this icon to open the Customize Columns window.


Time Sub-Tab

This section describes the fields and actions on the Time sub-tab of the Working Budget tab in the Budgeting workspace.

Sub-Tab Fields






Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Resource Booking	<p>Click the icon to display the Resource Bookings wizard, which contains the embedded People Planner Budgeting Assistant web component.</p> <p>The Budgeting Assistant web component displays resource planning related specifically to the current budget line.</p> <p>This icon only displays if:</p>

Field	Description
	<ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line. <p>For more information about this web component and its related procedures, search on "Budgeting Assistant" in the Deltek People Planner Web Components Guide.</p> <div> <p>Note: While you can view the web components embedded in Maconomy on your tablet, some actions are only available via right-click menus, and the right-click function is not supported on tablets. Deltek recommends that you view these web components on desktop browsers.</p> </div>
	Click this icon to assign skills to the current budget line.
Resource Forecast	<p>Click the icon to display the Resource Forecast wizard, which contains Maconomy data retrieved from People Planner.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line. The current line is not a sum/text line.
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the Task assigned to the budget line.
Line Type	<p>Select the applicable type of activity for the budget line. The drop-down list include the following activity types:</p> <ul style="list-style-type: none"> Time Outlay Amount Milestone Sum/Text
Task	Select from the drop-down list which task the budget line should be assigned to.
Employee Category	Select an employee category to the job budget from the drop-down list.

Field	Description
	<p>Note: This field is shown only when required on a job. If you are working on a job that utilizes employees in a different way, this field is hidden in the sub-tab. For example, if you are working on a job with a budget matrix, which provides employee information on a different level, this field is hidden.</p>
Employee	<p>If the current budget line relates to an employee, select the employee from the drop-down list.</p> <p>Note: This field is shown only when required on a job. If you are working on a job that utilizes employees in a different way, this field is hidden in the sub-tab. For example, if you are working on a job with a budget matrix, which provides employee information on a different level, this field is hidden.</p>
Incl. in FP	<p>This check box is selected if the entry that applies to the line is included in the fixed price of a job.</p> <p>Note: This field is shown only when the current job setup bills items to a fixed price amount.</p>
Quantity	Enter the budgeted quantity for the budget line. For time activities, this field is in hours or days, depending on the time unit on the job.
Cost	Enter the cost of the activity on the budget line.
Total Cost	This field displays the total amount of the Cost multiplied by the number in the Quantity field.
Billing Price	Enter the billing price of the activity on the budget line. The value for non-invoiceable activities must be zero.
Total Billing Price	This field displays the total amount of the Billing Price multiplied by the number in the Quantity field.
Gross Margin	This field displays the gross margin. Maconomy calculates the gross margin by subtracting the cost in the Total Cost field from the billing price in the Total Billing Price field.
Markup	This field displays the markup percentage.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Time sub-tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Job Budget Line ▪ Delete Job Budget Line ▪ Revert
Change Resources	<p>Click this action button to update the current resources.</p> <div> <p>Note: This action is available only on jobs that use a budget matrix. A wizard displays to enable you to update resources. When you add resources for a budget matrix job, each resource is shown as a column in the table after you close the wizard. You can enter values for each resource.</p> </div>
+ Add Job Budget Line	Click this action button to add another job budget line to the bottom of the budget.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	Click this icon to open the Customize Columns window.

Amount Sub-Tab

This section describes the fields and actions on the Amount sub-tab of the Working Budget tab in the Budgeting workspace.



Sub-Tab Fields




Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Resource Booking	<p>Click the icon to display the Resource Bookings wizard, which contains the embedded People Planner Budgeting Assistant web component.</p> <p>The Budgeting Assistant web component displays resource planning related specifically to the current budget line.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> ▪ The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. ▪ The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line. <p>For more information about this web component and its related procedures, search on "Budgeting Assistant" in the Deltek People Planner Web Components Guide.</p> <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>Note: While you can view the web components embedded in Maconomy on your tablet, some actions are only available via right-click menus, and the right-click function is not supported on tablets. Deltek recommends that you view these web components on desktop browsers.</p> </div>
Resource Forecast	<p>Click the icon to display the Resource Forecast wizard, which contains Maconomy data retrieved from People Planner.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> ▪ The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. ▪ The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line. ▪ The current line is not a sum/text line.
Description	<p>Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the Task assigned to the budget line.</p>
Line Type	<p>Select the applicable type of activity for the budget line. The drop-down list include the following activity types:</p> <ul style="list-style-type: none"> ▪ Time ▪ Outlay ▪ Amount ▪ Milestone ▪ Sum/Text

Field	Description
Task	Select from the drop-down list which task the budget line should be assigned to.
Incl. in FP	<p>This check box is selected if the entry that applies to the line is included in the fixed price of a job.</p> <div> <p>Note: This field is shown only when the current job setup bills items to a fixed price amount.</p> </div>
Quantity	Enter the budgeted quantity for the budget line.
Cost	Enter the cost of the activity on the budget line.
Total Cost	This field displays the total amount of the Cost multiplied by the number in the Quantity field.
Billing Price	Enter the billing price of the activity on the budget line. The value for non-invoiceable activities must be zero.
Total Billing Price	This field displays the total amount of the Billing Price multiplied by the number in the Quantity field.
Gross Margin	This field displays the gross margin. Maconomy calculates the gross margin by subtracting the cost in the Total Cost field from the billing price in the Total Billing Price field.
Markup	This field displays the markup percentage.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Amount sub-tab, choose from the following actions:</p> <ul style="list-style-type: none"> ■ Insert Budget Line ■ Delete Budget Line ■ Revert
+ Add Budget Line	Click this action button to add another budget line to the bottom of the budget.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>

Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Baseline Tab

This section describes the fields and actions on the Baseline tab of the Budgeting workspace.

Use this tab to create a baseline budget comparison against your working budget.

Note: This tab and its fields are only available depending on job setup, and if baseline comparison is enabled on the current job.

Field	Description
Fixed Price, Time	<p>This field displays the budgeted amount of employee time on a fixed price job, as entered in the sub-tab. The value in this field is displayed either in days or hours, depending on the time unit used on the job.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all expenses, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Cost	<p>This field displays the budgeted fixed cost price of the job. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total cost of time activities ▪ Amount - Total cost of amount activities ▪ Total - Total cost of all budget lines ▪ Total Currency - Total cost of all budget lines in the job currency. This field is shown only when the job currency differs from the base currency. <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price	<p>This field displays the total budgeted fixed billing price based on the job setup. Total fixed price values are displayed for the following:</p>

Field	Description
	<ul style="list-style-type: none"> ▪ Total - Total budgeted fixed price based on the job setup in the base currency. ▪ Total Currency - Total budgeted fixed price based on the job setup in the job currency. Note that this field is shown only when the job currency differs from the base currency. <p>Note: These fields are shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Gross Margin, Total	<p>This field displays the budgeted gross margin on the job for expenses that are included in the fixed price of the job. This is calculated by subtracting the value in the Fixed Price, Cost field from the Fixed Price, Total field.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
Fixed Price, Gross Margin %, Total	<p>This field displays the budgeted gross margin represented as a percentage on the fixed price of the job.</p> <p>Note: This field is shown only if the job is set up with a fixed price. If you are working on a job that is set up to bill all costs, such as T&M jobs, this field is automatically hidden in the tab.</p>
T&M, Time	<p>This field displays the budgeted amount of employee time on a job that is billed separately from the fixed price. The value in this field is displayed either in days or hours, depending on the time unit used on the job.</p> <p>Note: This field is shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Cost	<p>This field displays the budgeted billing prices of the job. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total cost of time activities ▪ Amount - Total cost of amount activities ▪ Total - Total cost of all budget lines ▪ Total Currency - Total cost of all budget lines in the job currency. This field is shown only when the job currency differs from the base currency. <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>

Field	Description
Billing Price	<p>This field displays the budgeted billing prices based on lines created in the sub-tab. Total billing prices are displayed for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total billing price of T&M time activities ▪ Amount - Total billing price of T&M amount activities ▪ Total - Total billing price of all budget lines ▪ Total Currency - Total billing price of all budget lines in the job currency. This field is shown only when the job currency differs from the base currency. <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Total	<p>This field displays the total of all the budgeted costs and billing prices entered in the sub-tab.</p> <p>Note: This field is shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Total, Currency	<p>This field displays the total of all the budgeted costs and billing prices entered in the sub-tab in the job currency.</p> <p>Note: This field is shown only when the job currency is different from the base currency.</p>
T&M, Gross Margin	<p>This field displays the budgeted gross margin on the job for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total budgeted gross margin for all time activities ▪ Amount - Total budgeted gross margin for all amount activities ▪ Total - Total budgeted gross margin for all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>
T&M, Gross Margin %	<p>This field displays the budgeted gross margin represented as a percentage on the job for the following:</p> <ul style="list-style-type: none"> ▪ Time - Total budgeted gross margin % for all time activities ▪ Amount - Total budgeted gross margin % for all amount activities ▪ Total - Total budgeted gross margin % for all budget lines <p>Note: These fields are shown only for T&M jobs or fixed price jobs where some budget lines are excluded from the fixed price.</p>

Field	Description
Grand Total	<p>This field displays the total of all the budgeted costs and billing prices entered in the sub-tab.</p> <p>If the current job is set up to track costs separately for fixed price items and billed costs, this field combines the costs for both.</p> <p>Note: This field is shown in the tab only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Grand Total, Currency	<p>This field displays the total of all the budgeted costs entered in the sub-tab in the job currency.</p> <p>Note: This field is shown in the tab only when the job currency is different from the base currency. It is also shown only when the job is set up to track costs for a fixed price, or is a fixed price job that also has billable expenses. If you are working on a T&M job, this field is automatically hidden.</p>
Resource Allocation Complete	<p>Use the radio buttons to indicate whether you are done with resource allocations for the job relevant to the budget you are viewing.</p> <p>If this field is set to Yes, Maconomy updates the existing working budget with quantities, costs, and revenues based on the resource allocations.</p> <p>This field only displays if:</p> <ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget.
Submitted	<p>This field displays the date the current budget was submitted, and the name of the employee who submitted it.</p>
Approved	<p>This field displays the date the current budget was approved, and the name of the employee who approved it.</p>

Tab Actions

Button	Description
Create Baseline Budget	Click this action button to create a baseline budget for the job.
Submit Budget	<p>Click this action button to submit a budget for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>

Button	Description
Reject Budget...	<p>Click this action button to reject the current budget.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Approve Budget	<p>Click this action button to approve the current budget.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Reopen Budget	Click this action button to reopen an approved budget.
Undo Reject	<p>Click this action button to undo rejection of a budget.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Other Actions	<p>In the Budgeting workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Remove All Lines - Click this action button to delete all lines in the sub-tab. ▪ Recalculate Budget - Click this action button to recalculate prices on the budget lines currently displayed. ▪ Copy Budget - Click this action button to copy the current budget.

Full Budget Sub-Tab

This section describes the fields and actions on the Full Budget sub-tab of the Baseline tab in the Budgeting workspace.



Sub-Tab Fields



Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Resource Forecast	<p>Click the icon to display the Resource Forecast wizard, which contains Maconomy data retrieved from People Planner.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> ▪ The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application.

Field	Description
	<ul style="list-style-type: none"> The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line. The current line is not a sum/text line.
Description	Copy to come.
Line Type	Copy to come.
Task	Copy to come.
Incl. in FP	Copy to come.
Qty	Copy to come.
Cost	Copy to come.
Total Cost	Copy to come.
Billing Price	Copy to come.
Total Billing Price	Copy to come.
GM	Copy to come.
Markup	Copy to come.

Sub-Tab Actions

Button	Description
+ Add Budget Line	Copy to come.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>

Button	Description
	
	Click this icon to open the Customize Columns window.

Time Sub-Tab

This section describes the fields and actions on the Time sub-tab of the Baseline tab in the Budgeting workspace.





Sub-Tab Fields

Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Resource Forecast	Click the icon to display the Resource Forecast wizard, which contains Maconomy data retrieved from People Planner. This icon only displays if: <ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line. The current line is not a sum/text line.
Description	Copy to come.
Line Type	Copy to come.
Task	Copy to come.
Incl. in FP	Copy to come.
Qty	Copy to come.
Cost	Copy to come.

Field	Description
Total Cost	Copy to come.
Billing Price	Copy to come.
Total Billing Price	Copy to come.
GM	Copy to come.
Markup	Copy to come.

Sub-Tab Actions

Button	Description
+ Add Job Budget Line	Copy to come.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Amount Sub-Tab

This section describes the fields and actions on the Amount sub-tab of the Baseline tab in the Budgeting workspace.






Sub-Tab Fields

Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Resource Forecast	<p>Click the icon to display the Resource Forecast wizard, which contains Maconomy data retrieved from People Planner.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current budget line. The current line is not a sum/text line.
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the task assigned to the budget line.
Line Type	<p>Select the applicable type of activity for the budget line. The drop-down list include the following activity types:</p> <ul style="list-style-type: none"> Time Outlay Amount Milestone Sum/Text
Task	Select from the drop-down list which task the budget line should be assigned to.
Incl. in FP	<p>This check box is selected if the entry that applies to the line is included in the fixed price of a job.</p> <div> <p>Note: This field is only shown when the current job setup bills items to a fixed price amount.</p> </div>
Quantity	Enter the budgeted quantity for the budget line.
Cost	Enter the cost of the activity on the budget line.
Total Cost	This field displays the total amount of the Cost multiplied by the number in the Quantity field.
Billing Price	Enter the billing price of the activity on the budget line. The value for non-invoiceable activities must be zero.
Total Billing Price	This field displays the total amount of the Billing Price multiplied by the number in the Quantity field.

Field	Description
Gross Margin	This field displays the gross margin. Maconomy calculates the gross margin by subtracting the cost in the Total Cost field from the billing price in the Total Billing Price field.
Markup	This field displays the markup percentage.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Amount sub-tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Budget Line ▪ Delete Budget Line ▪ Revert
+ Add Budget Line	Click this action button to add another budget line to the bottom of the budget.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	Click this icon to open the Customize Columns window.

Contract Tab

This section describes the fields and actions on the Contract tab of the Budgeting workspace.

Use this tab to create a contract budget.

Note: This tab is shown only for fixed price jobs where the fixed price basis is either Budget or Quote. It is also shown for T&M jobs with **Handling of Overruns** or **Recognize Revenue by Completion Percentage** enabled.

The fields are dynamic and display different information depending on the current job's setup.

Fixed Price Jobs Based on Quote

Attention: The following fields are shown only for fixed price jobs based on an approved quote. You can edit the quote in this tab.

Tab Fields

Field	Description
Current	This field displays the current price of the fixed price job.
New	Enter a new fixed price value in this field.
Submitted	This field displays the date the current quote was submitted, and the name of the employee who submitted it.
Approved	This field displays the date the current quote was approved, and the name of the employee who approved it.
Revision Number	This field displays the latest revision of the current quote.

Tab Actions

Button	Description
Submit Quote	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.
Approve Quote	Click this action button to approve the current quote. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.
Reopen Quote	Click this action button to reopen an approved budget.

Fixed Price Jobs Based on Budget

Attention: The following fields are shown only when you are working on fixed price jobs or T&M jobs with **Handling of Overruns** or **Recognize Revenue by Completion Percentage** enabled, based on an approved budget. Maconomy displays the budget type indicated in the job setup.

Tab Fields

Field	Description
Fixed Price	This field displays the fixed price for the current job in the following: <ul style="list-style-type: none"> ▪ Base - the base currency of the job ▪ Currency - the job currency
Base	This field displays the total fixed price amount of the Billing Price multiplied by the number in the Quantity field.
Currency	This field displays the total fixed price amount of the Billing Price multiplied by the number in the Quantity field in the job currency.
Total	This field displays the total fixed price of the current job in the following: <ul style="list-style-type: none"> ▪ Base - the base currency of the job ▪ Currency - the job currency

Tab Actions

Button	Description
Create Contract Budget	Click this action button to create a contract budget for the job.
Submit Budget	Click this action button to submit a budget for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow. </div>
Reject Budget...	Click this action button to reject the current budget. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies. </div>
Approve Budget	Click this action button to approve the current budget. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow. </div>
Reopen Budget	Click this action button to reopen an approved budget.
Undo Reject	Click this action button to undo rejection of a budget.






Button	Description
	<p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Other Actions	<p>In the Budgeting workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Remove All Lines - Click this action button to delete all lines in the sub-tab. ▪ Recalculate Budget - Click this action button to recalculate prices on the budget lines currently displayed. ▪ Copy Budget - Click this action button to copy the current budget.

Table Fields

Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Description	Enter a description for the job budget. If the field is blank, Maconomy automatically derives the description from the task assigned to the budget line.
Line Type	<p>Select the applicable type of activity for the budget line. The drop-down list include the following activity types:</p> <ul style="list-style-type: none"> ▪ Time ▪ Outlay ▪ Amount ▪ Milestone ▪ Sum/Text
Task	Select a task from the drop-down list to assign to the budget line.
Quantity	Enter the budgeted quantity for the budget line. For time activities, this field is in hours or days, depending on the time unit on the job.
Billing Price	Enter the billing price of the activity on the budget line. The value for non-invoiceable activities must be zero.
Total Billing Price	This field displays the total amount of the Billing Price multiplied by the number in the Quantity field.

Table Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Full Budget tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Budget Line ▪ Delete Budget Line ▪ Revert
+ Add Budget Line	Click this action button to add another budget line to the bottom of the budget.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	Click this icon to open the Customize Columns window.

Revisions Tab

This section describes the fields and actions on the Revisions tab of the Budgeting workspace.

This tab displays all the approved revisions and changes made to the job budget. This also allows you to print any revision of the job budgets. Note that you cannot change any of the fields in this tab. If you are working on a fixed price job, the tab displays separate budget information for expenses that are included in the fixed prices budget (under Fixed Price), and for expenses that are separately billed (under T&M).




Field	Description
Budget Type	This field displays the budget type of the current revision.
Revision No.	This field displays the revision number of the current job budget.
Cost Price, Base	This field displays the budgeted cost of the current revision in the base currency at the time when the revision was created.



Field	Description
Billing Price, Base	This field displays the budgeted billing price of the current revision in the base currency at the time when the revision was created.
Date Submitted	This field displays the date the current revision was submitted.
Submitted By	This field displays the name of the employee who submitted the current revision.

Revision Number Island

Field	Description
Fixed Price, Time	<p>This field displays the budgeted amount of employee time on a fixed price job, as entered in the sub-tab. The value in this field is displayed either in days or hours, depending on the time unit used on the job.</p> <div style="border: 1px solid #0070C0; padding: 5px;"> <p>Note: This field is shown only if the job is set up to track time activities for a fixed price. If you are working on a job that is set up to bill all expenses, such as T&M jobs, this field is automatically hidden in the tab.</p> </div>
Fixed Price, Cost	<p>This field displays the budgeted fixed price of the current revision. Total costs are displayed for the following:</p> <ul style="list-style-type: none"> ■ Time - Total cost of time activities ■ Amount - Total cost of amount activities ■ Total - Total cost of all budget lines ■ Total, Currency - Total cost of all budget lines in the job currency. This field is shown only when the job currency differs from the base currency.

Tab Actions

Button	Description
Print Budget	Click this action button to print the current budget revision.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.

Button	Description
	
	Click this icon to open the Customize Columns window.

Full Budget Sub-Tab

This section describes the fields and actions on the Full Budget sub-tab of the Revisions tab in the Budgeting workspace.


Sub-Tab Fields




Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Price Breakdown	Click to display the price breakdown of the selected budget line. Note: This field is shown only when the current job uses a budget matrix. When you add hours in the budget matrix, Maconomy creates lines for each utilized resource in the price breakdown wizard that opens. You can modify the details regarding hours and prices for each line.
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the Task assigned to the budget line.
Line Type	Select the applicable type of activity for the budget line. The drop-down list include the following activity types: <ul style="list-style-type: none"> Time Outlay Amount Milestone Sum/Text
Task	Select from the drop-down list which task the budget line should be assigned.
Employee Category	Select an employee category to the job budget from the drop-down list. Note: This field is shown only when required on a job. If you are working on a job that utilizes employees in a different way, this field is hidden in the

Field	Description
	sub-tab. For example, if you are working on a job with a budget matrix, which provides employee information on a different level, this field is hidden.
Employee	<p>If the current budget line relates to an employee, select the employee from the drop-down list.</p> <p>Note: This field is shown only when required on a job. If you are working on a job that utilizes employees in a different way, this field is hidden in the sub-tab. For example, if you are working on a job with a budget matrix, which provides employee information on a different level, this field is hidden.</p>
Incl. in FP	<p>This check box is selected if the entry that applies to the line is included in the fixed price of a job.</p> <p>Note: This field is shown only when the current job setup bills items to a fixed price amount.</p>
Quantity	Enter the budgeted quantity for the budget line. For time activities, this field is in hours or days, depending on the time unit on the job.
Cost	Enter the cost of the activity on the budget line.
Total Cost	This field displays the total amount of the Cost multiplied by the number in the Quantity field.
Billing Price	Enter the billing price of the activity on the budget line. The value for non-invoiceable activities must be zero.
Total Billing Price	This field displays the total amount of the Billing Price multiplied by the number in the Quantity field.
Gross Margin	This field displays the gross margin. Maconomy calculates the gross margin by subtracting the cost in the Total Cost field from the billing price in the Total Billing Price field.
Markup	This field displays the markup percentage.

Sub-Tab Actions

Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>

Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Time Sub-Tab

This section describes the fields and actions on the Time sub-tab of the Revisions tab in the Budgeting workspace.



Sub-Tab Fields



Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the Task assigned to the budget line.
Line Type	<p>Select the applicable type of activity for the budget line. The drop-down list include the following activity types:</p> <ul style="list-style-type: none"> Time Outlay Amount Milestone Sum/Text
Task	Select from the drop-down list which task the budget line should be assigned.
Employee Category	<p>Select an employee category to the job budget from the drop-down list.</p> <p>Note: This field is shown only when required on a job. If you are working on a job that utilizes employees in a different way, this field is hidden in the sub-tab. For example, if you are working on a job with a budget matrix, which provides employee information on a different level, this field is hidden.</p>

Field	Description
Employee	<p>If the current budget line relates to an employee, select the employee from the drop-down list.</p> <p>Note: This field is shown only when required on a job. If you are working on a job that utilizes employees in a different way, this field is hidden in the sub-tab. For example, if you are working on a job with a budget matrix, which provides employee information on a different level, this field is hidden.</p>
Incl. in FP	<p>This check box is selected if the entry that applies to the line is included in the fixed price of a job.</p> <p>Note: This field is shown only when the current job setup bills items to a fixed price amount.</p>
Quantity	Enter the budgeted quantity for the budget line. For time activities, this field is in hours or days, depending on the time unit on the job.
Cost	Enter the cost of the activity on the budget line.
Total Cost	This field displays the total amount of the Cost multiplied by the number in the Quantity field.
Billing Price	Enter the billing price of the activity on the budget line. The value for non-invoiceable activities must be zero.
Total Billing Price	This field displays the total amount of the Billing Price multiplied by the number in the Quantity field.
Gross Margin	This field displays the gross margin. Maconomy calculates the gross margin by subtracting the cost in the Total Cost field from the billing price in the Total Billing Price field.
Markup	This field displays the markup percentage.

Sub-Tab Actions

Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>

Button	Description
	
	Click this icon to open the Customize Columns window.

Amount Sub-Tab

This section describes the fields and actions on the Amount sub-tab of the Revisions tab in the Budgeting workspace.





Sub-Tab Fields

Note: On parent lines in tree tables, only the **Description** field is editable. On non-parent sum lines in tree tables, only the **Description**, **Line Type**, and **Task** fields are editable.

Field	Description
Description	Enter a description for the job budget line. If the field is blank, Maconomy automatically derives the description from the Task assigned to the budget line.
Line Type	Select the applicable type of activity for the budget line. The drop-down list include the following activity types: <ul style="list-style-type: none"> Time Outlay Amount Milestone Sum/Text
Task	Select from the drop-down list which task the budget line should be assigned.
Incl. in FP	This check box is selected if the entry that applies to the line is included in the fixed price of a job. <div> <p>Note: This field is only shown when the current job setup bills items to a fixed price amount.</p> </div>
Quantity	Enter the budgeted quantity for the budget line.
Cost	Enter the cost of the activity on the budget line.

Field	Description
Total Cost	This field displays the total amount of the Cost multiplied by the number in the Quantity field.
Billing Price	Enter the billing price of the activity on the budget line. The value for non-invoiceable activities must be zero.
Total Billing Price	This field displays the total amount of the Billing Price multiplied by the number in the Quantity field.
Gross Margin	This field displays the gross margin. Maconomy calculates the gross margin by subtracting the cost in the Total Cost field from the billing price in the Total Billing Price field.
Markup	This field displays the markup percentage.

Sub-Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Budgeting Procedures

This section describes the steps you need to follow to work with budgets.

Create a Budget

You can create several budgets for your job, such as a working budget to manage estimates to completion, and a baseline budget to compare your progress. You can also specify the fixed price

of your job in the Contract tab. This is done in a contract budget, or defined by a quote depending on the setup of your job.

To create a budget:

1. Under the Jobs menu section, go to **Jobs » Budgeting workspace**.
2. Use the search filter and/or the **Search** field to select a job.
3. Depending on the budget you wish to create, click **Working Budget**, **Baseline**, or **Contract**. The available tabs depend on the setup of your job.
4. Click **Create Working / Baseline / Contract...**
5. To add budget lines, click **+ Add Budget Line**.
6. Enter information in the lines as needed.
7. Click **Save**.

Edit a Budget

You can edit a budget to add or modify information regarding your expenses on the job. However, if it has already been submitted or approved, the budget will be reopened and will go through the approval process again.

To edit budget lines:

1. Under the Jobs menu section, go to **Jobs » Budgeting workspace**.
2. Use the search filter and/or the **Search** field to select a job.
3. Click the tab you want to update.
4. Edit the lines in the table as needed.
5. If you want to revert your changes, click **Revert**. Otherwise, click **Save** or press ENTER.

Submit a Budget

When you have finalized all details in the budget, you can submit it for approval.

To submit a budget:

1. Under the Jobs menu section, go to **Jobs » Budgeting workspace**.
2. Use the search filter and/or the **Search** field to select a job.
3. Click **Submit Budget**.

Approve or Reject a Budget

Use these steps to review and approve or reject new/updated budgets submitted for your approval. You can also approve (and reject) budgets in the Approval Center workspace.

To approve or reject a budget:

1. Under the Jobs menu section, go to **Jobs » Budgeting workspace**.
2. Use the search filter and/or the **Search** field to select a budget.
3. To approve the budget:
 - a) Click **Approve Budget**.
4. To reject the budget:
 - a) Click **Reject Budget....**
Maconomy displays the Reject Line wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Reopen a Budget

To modify information in a budget that has already been submitted, you must reopen it for editing.

To reopen a budget:

1. Under the Jobs menu section, go to **Jobs » Budgeting workspace**.
2. Use the search filter and/or the **Search** field to select a job.
3. Click **Reopen Budget**.

Copy a Budget

Use these steps to copy a budget.

To copy a budget:

1. Under the Jobs menu section, go to **Jobs » Budgeting workspace**.
2. Use the search filter and/or the **Search** field to select a job.
3. From the **Other Actions** drop-down list, select **Copy Budget**.

Assign Skill Requirement to a Budget Line

Use these steps to assign skills to a budget line.

To assign a skill:

1. Under the Jobs submenu, go to **Budgeting Workspace » Working Budget » Full Budget subtab** or **Time subtab**.

Enter the result of your step here (optional).

2. Click the **Assign Skills** icon on a budget line.

Note: This icon is available only on time lines.

3. In the wizard that opens, click **+ Add Skills Requirement**.
4. Add information in the following fields:
 - **Skill Number**
 - **Skill Name**
 - **Level**
 - **Requirement Type**
5. Press ENTER to save the line.
6. To select an existing skill requirement to add to the budget line, click on a skill on the list.
7. Click **Save**.

Resourcing

Use the Resourcing workspace to access the embedded People Planner Resourcing Overview web component.

This workspace is found under the **Jobs menu section » Jobs sub-menu**. It is only available if the company-specific **Enable People Planner Web** system parameter is enabled in the corresponding Workspace Client application.

Resourcing Concepts

This workspace allows project managers and others with similar roles to perform their project planning tasks in Maconomy.

While the Resourcing Overview web component has undergone minor updates to better align with Maconomy, its functionality remains the same.

For more information about this web component and related procedures, search on "The Resourcing Workspace" in the [Deltak People Planner Web Components Guide](#).

Note: While you can view the web components embedded in Maconomy on your tablet, some actions are only available via right-click menus, and the right-click function is not supported on tablets. Deltak recommends that you view these web components on desktop browsers.

Quotes

The Quotes workspace enables you to create, edit, and print job quotes as well as order confirmations. In addition, this workspace supports quote revisions, and the approval hierarchy functionality for job quotes.

Quotes Concepts

You can:

- Add, insert, copy, and delete quote lines.
- Add a quote based on a budget.
- Submit, and approve or reject quotes.
- Review and restore quote revisions.
- Print quotes, draft quotes, and order confirmations.

The Quotes tab displays your quotes and relevant account information, including calculations. In this tab you can print, submit, approve, and accomplish other administrative tasks in relation to your quotes and order confirmations. The Quote Revisions tab displays all versions of your quote lines. These capabilities are parallel to what is in the Workspace Client.

The Quotes workspace is included in the Jobs section of the menu.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notification is included:

- **Rejected Job Quote** — Appears for a user who submitted the job quote to indicate the quote has been rejected. This notification points to the relevant job quote in the Quotes workspace.




Quotes Fields

This section describes the fields and actions on the Quotes workspace.

Card Part Fields

Field	Description
Job	This field displays the job name and number to which the quote is added.
Customer	This field displays the customer name and number.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the budget status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action to undo changes made to the current record, or to any of its lines.

Quote Tab

This section describes the fields and actions on the Quote tab of the Quotes workspace.

Tab Fields

Field	Description
New Quote Price	This field displays the total price of the quote in the job's specified currency.
Invoice Discount	This field displays the invoice discount for the job in the job's specified currency.
Tax	This field displays the taxed amount according to the selected code in the Tax Code field.
Balance Due	This field displays the total order confirmation price in the job's specified currency. It is the sum of the values in the New Quote Price , Invoice Discount , and Tax fields.
Effective Quote Price	This field displays the effective quote price of the job. The quote must be approved whenever the quote price is changed for the price to reflect in this field.
Budget Type	This field displays the budget type of the selected job budget.
Billing Price	This field displays the currency and total price of the job quote, excluding tax.
Deviation	This field shows the difference between the billing and quote prices.

Field	Description
Remarks 1-3	Enter additional information related to the job quote in these fields.

Tab Actions

Button	Description
Submit Quote	<p>Click this action button to submit a quote for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p> </div>
Approve Quote	<p>Click this action button to approve a quote.</p> <p>This action is available for users with requisite access rights only.</p>
Reopen Quote	<p>Click this action to reopen the job quote.</p> <p>Once reopened, you can add, edit, or delete quote lines.</p>
Other Actions	<p>In the Quotes workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Print Quote - Click this action to print an approved job quote. ▪ Print Draft Quote - Click this action to generate a PDF of the selected job quote. You may review the PDF on screen, or save and print a copy. ▪ Print Order Confirmation - Click this action to print a job order confirmation. ▪ Delete Quote Lines - Click this action to delete quote lines. ▪ Copy Quote... - Click this action to copy a quote by using either the job number or the revision number. Once you have selected the lines, these are added to the current quote. ▪ Restore Quote Revision - Click this action to restore a quote revision.




Quote Lines Sub-Tab




This section describes the fields and actions on the Quotes Lines sub-tab of the Quote tab in the Quotes workspace.

Sub-Tab Fields

Field	Description
Description	Enter a description of the quote line.
Qty	Enter the quantity of the item included in your job quote.
Billing Price	Enter the billing price of the item included in your job quote.
Total Billing Price	This field displays the total billing price in the currency of your job invoice, and is automatically calculated. You cannot edit this field.
Tax Code	Select a tax code to apply to the current line.
Subtotal	Select this check box to display the subtotal of your quote.
Total Price Only	Select this check box to display the total price of your quote.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add or delete quote lines to your job.</p> <p>For lines in the Quote tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Quote Line - Click this action to insert a quote line. ▪ Delete Quote Line - Click this action to delete a quote line.
+ Add Quote Line	Click this action to add a quote line to your job.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.

Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>





Quote Revisions Tab



This section describes the fields and actions on the Quote Revisions tab of the Quotes workspace.

Tab Fields

Field	Description
Revision No.	This field displays the revision number of your quote.
New Quote Price	This field displays the total price of the quote in the job's specified currency.
Invoice Discount %	This field displays the invoice discount for the job in percentage.
Tax	This field displays the tax applied to your invoice.

Tab Actions

Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>

Button	Description
	
	Click this icon to open the Customize Columns window.

Quotes Procedures

This section describes the steps you need to follow to work with quotes.

Create a Quote

You can add quotes to a job based on the price estimates and product quantity in your job budget.

To create a quote:

1. Under the Jobs menu section, go to **Jobs » Quotes**
2. Use the search filter and/or the **Search** field to select a job.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

3. To add quote lines, click **+ Add Quote Line**.
4. Enter the necessary details for your quote line.
5. Click **Save**.

Edit a Quote

You can modify the information in an existing quote, with exception to those which you have submitted, and those which the project manager has approved or rejected.

To edit a quote:

1. Under the Jobs menu section, go to **Jobs » Quotes**.
2. Use the search filter and/or the **Search** field to select the job quote you want to update.
3. Edit the fields as needed.
4. Click **Revert** if you want to undo your changes. Otherwise, click **Save** or press ENTER.

Delete a Quote

You can remove quote lines as needed.

To delete a quote:

1. Under the Jobs menu section, go to **Jobs > Quotes**.
2. Use the search filter and/or the **Search** field to select a job.

Note: When the project manager has approved or rejected the job quote, you cannot delete lines.

3. From the **Other Actions** drop-down list, select **Delete Quote Lines**.
A confirmation window appears.
4. Click **Delete** to confirm deletion, or **Cancel** to exit without deleting.

Copy a Quote

Use these steps to copy quotes.

To copy a quote:

1. Under the Jobs menu section, go to **Jobs > Quotes**.
2. Use the search filter and/or the **Search** field to select a job quote.
3. From the **Other Actions** drop-down list, select **Copy Quote...**

Submit a Quote

Use these steps to submit your new or edited job quotes for approval.

To submit a quote:

1. Under the Jobs menu section, go to **Jobs > Quotes**.
2. Use the search filter and/or the **Search** field to select the job quote you want to submit for approval.

Note: You can only submit open job quotes.

3. Click **Submit Quote**.

Approve or Reject a Quote

Use these steps to approve or reject a quote. You can view all approved job quotes in the Quotes Revisions tab.

To approve/reject a quote:

1. Under the Jobs menu section, go to **Jobs > Quotes**

2. Use the search filter and/or the **Search** field to select the job quote for your approval.
3. To approve the job quote:
 - a) Click **Approve**.
4. To reject the job quote:
 - a) Click **Reject....**
Maconomy displays the Reject Line wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Reopen a Quote

When you reopen a quote, you can edit a submitted job quote.

To reopen a quote:

1. Under the Jobs menu section, go to **Jobs > Quotes**.
2. Use the search filter and/or the **Search** field to select a job quote.
3. Click **Reopen Quote**.

Print a Quote

Use these steps to print a job quote, draft quote, or an order confirmation.

To print a quote, draft quote, or an order confirmation:

1. Under the Jobs menu section, go to **Jobs > Quotes**.
2. Use the search filter and/or the **Search** field to select a job quote.
3. From the **Other Actions** drop-down list, select **Print Quote**, **Print Draft Quote**, or **Print Order Confirmation**.

Restore Quote Revisions

Use these steps to restore quote revisions.

To restore quote revisions:

1. Under the Jobs menu section, go to **Jobs > Quotes**.
2. Use the search filter and/or the **Search** field to select a job quote.
3. From the **Other Actions** drop-down list, select **Restore Quote Revision....**

Risk Management

The Risk Management Workspace allows project managers and the like to manage risks related to a specific job.

Risk Management Concepts

You can:

- Estimate costs for risks that you associate with a specific job, and compare these costs to the approved risk fund in your job budget.
- View and edit existing risks.
- Copy risks from another job.

This workspace is listed under the Jobs submenu.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notification is included:

- **Job Risk Due** - Appears for the user to indicate that an owned job risk line is due in 20 days. This notification points to the relevant job in the Risk Management workspace.



Risk Management Fields


This section describes the fields and actions on the Risk Management workspace.

Card Part Fields

Field	Description
Job	This field displays the name and number of the job you selected.
Company	This field displays the name and number of the company in charge of the job you selected.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
	Click to display the list view. Click to display the detailed view.

Button	Description
	
Save	Click this action button to save changes to the current record.
Revert	Click this action button to undo unsaved changes made to the current record, or to any of its lines.

Risks Tab

Use this tab to create, modify, and view risks associated with a specific job.

Selection Criteria Panel

Use the available criteria to filter the risks that Maconomy displays for the job you selected. The application filters the risk lines as soon as you change any of the criteria fields.

Field	Description
Show Open Only	Toggle on to show open risk lines only.
Status	To show the risk lines with a specific status, select an option from the drop-down list. Available options are customized in the Popup Fields single dialog of the Workspace Client.
Category	To show the risk lines from a specific category, select an option from the drop-down list. Available options are customized in the Popup Fields single dialog of the Workspace Client.
Type	To show the risk lines of a specific type, select an option from the drop-down list. Available options are customized in the Popup Fields single dialog of the Workspace Client.

Risks Tab Fields

Field	Description
Risk Profile	This field is used by the project manager to specify the overall job risk profile. To edit the field value, select a different risk level from the drop-down list. Available options are customized in the Popup Fields single dialog of the Workspace Client.

Field	Description
Approved Risk Fund	This field displays the sum of all amounts entered on job budget lines for risk-related tasks, in base currency. These job budget lines are from the latest approved budget (typically the working budget).
Assigned Risk Fund	This field displays the sum of all costs entered in the Assigned Risk Fund column of the Risks Details sub-tab. The sum is displayed in base currency.
Weighted Assigned Risk Fund	This field displays the sum of all costs entered in the Assigned Risk Fund column of the Risks Details sub-tab, multiplied by the values in the Probability % column of that sub-tab. The sum is displayed in base currency.


Risks Tab Actions


Button	Description
Copy Risks from Job	Click this action to copy risk lines from another job.

Risks Details Sub-Tab


This section describes the fields and actions on the Risks Details sub-tab of the Risks tab in the Risk Management workspace.





Sub-Tab Fields

Field	Description
	Click the arrow to enter additional information about the current risk line. <ul style="list-style-type: none"> Description - Enter a brief description of the risk. Mitigation - You can provide details about how you plan to mitigate the risk. Resolution - You can provide details about how you plan to resolve the risk.
Name	Enter a name for the risk.
Status	To specify a risk status, select an option from the drop-down list. Available options are customized in the Popup Fields single dialog of the Workspace Client.
Closed	This field displays a check mark for closed risk lines.
Category	To specify a risk category, select an option from the drop-down list.

Field	Description
	Available options are customized in the Popup Fields single dialog of the Workspace Client.
Type	To specify a risk type, select an option from the drop-down list. Available options are customized in the Popup Fields single dialog of the Workspace Client.
Probability %	Enter a probability percentage for the risk. You can enter a value of 0-100.
Owner	Specify the employee assigned to the risk. If you added the risk line, Maconomy assigns the risk to you by default. This field is required.
Due Date	Specify a due date for the risk.
Assigned Risk Fund	Assign a cost to the risk line in base currency.
Changed By	This field displays the name of the employee who last updated the risk line.
Changed On	This field displays the date the risk line was last updated.
	<p>The Row Tools icon allows you to perform additional actions on the current risk line.</p> <p>For open risk lines, the following actions are available:</p> <ul style="list-style-type: none"> ▪ Insert Job Risk ▪ Delete Job Risk ▪ Close <p>For closed risk lines, the following actions are available:</p> <ul style="list-style-type: none"> ▪ Insert Job Risk ▪ Reopen

Sub-Tab Actions

Button	Description
+ Add Job Risk	Click this action to add a risk line for the job currently selected.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>

Button	Description
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Risk Management Procedures

This section describes the steps you need to follow when working on job risk lines.

Add a Risk Line

You can add a line for each risk that you associate with a job. Estimate the cost for each risk, and compare these costs to the approved risk fund for the job.

To add a risk line:

1. Under the Jobs menu section, go to **Jobs » Risk Management**.
2. Use the search filter and/or the **Search** field to select the job to which you want to add a risk line.
3. Click **+ Add Job Risk**.
Maconomy adds a line to the Risks Details table.
4. Fill out the line fields.
5. Click **Save**, or press ENTER.

Copy Risk Lines from Another Job

When adding risk lines to a job, you also have the option to copy those from another job. Note that copying risk lines from another job deletes all existing risks already specified for the target job.

To copy risk lines from another job:

1. Under the Jobs menu section, go to **Jobs » Risk Management**.
2. Use the search filter and/or the **Search** field to select the job to which you want to add risk lines (that is, the target job).
3. Click **Copy Risks from Job**.

The Copy Risks wizard displays.

4. In the **From Job No.** field, select a job from the drop-down.
5. Click **Copy Risks from Job**.
Maconomy copies the risks into the target job.

Note: Once under the target job, the copied risks are updated as follows:

- Any closed risks are now listed as open under the target job.
- The **Owner** field is updated with the employee number of the user who copied the risks from the other job (usually the project manager of the target job).
- The **Due Date** field is now blank. Specify a new due date for each risk line.

Edit a Risk Line

At any point in a job's life cycle, you can go in and edit any of the risks associated with the job.

To edit a risk line:

1. Under the Jobs menu section, go to **Jobs » Risk Management**.
2. Use the search filter and/or the **Search** field to select the job whose risk lines you want to edit.
3. Under the Risks Details table, select the risk line you want to edit.
4. Edit the line fields as needed.
5. Click **Save**, or press ENTER.

Close a Risk Line

You can close a risk for any of various reasons: if its due date has passed, if it took place and was handled/addressed, if it is no longer relevant, and so on.

To close a risk line:

1. Under the Jobs menu section, go to **Jobs » Risk Management**.
2. Use the search filter and/or the **Search** field to select a job.
3. On the risk line you want to close, click **Row Tools » Close**.
4. In the dialog that displays, click **Close**.
Maconomy selects the **Closed** field on the risk line.

Reopen a Risk Line

If you change your mind about any risk lines you closed, you can reopen them.

To reopen a closed risk line:

1. Under the Jobs menu section, go to **Jobs » Risk Management**.

2. Use the search filter and/or the **Search** field to select a job.
3. On the risk line you want to reopen, click **Row Tools » Reopen**.
4. In the dialog that displays, click **Reopen**.
Maconomy clears the **Closed** field on the risk line.

Delete an Open Risk Line

Deleting a risk line is irreversible. If you are unsure about whether you should delete a line, you can close it instead.

To delete an open risk line:

1. Under the Jobs menu section, go to **Jobs » Risk Management**.
2. Use the search filter and/or the **Search** field to select a job.
3. On the open risk line you want to delete, click **Row Tools » Delete Job Risk**.
4. In the dialog that displays, click **Delete**.
Maconomy deletes the risk line and refreshes the page.

Progress Evaluation

The Progress Evaluation workspace allows project managers and the like to create an overview of how jobs are progressing, and see whether they are on track in terms of time and cost estimates.

Progress Evaluation Concepts

You can:

- Enter your estimates for remaining work on each task in the working budget. You can specify this in terms of remaining time or costs.
- View the details of previous progress evaluations prepared for a job.
- Submit and approve progress evaluations.


This workspace is listed under the new Jobs submenu.



Progress Evaluation Fields

This section describes the fields and actions on the Progress Evaluation workspace.

Copy to come.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.

Button	Description
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record.
Revert	Click this action button to undo unsaved changes made to the current record, or to any of its lines.

Progress Evaluation Tab

This section describes the fields and actions on the Progress Evaluation tab of the Progress Evaluation workspace.

Copy to come.

Resourcing island

This island and the fields under it only display if:

- The company-specific **Enable People Planner Web** system parameter is enabled in your Workspace Client application.
- The **Use Imported Budget Line Resource Allocation** job parameter attribute is enabled on the current job.

Field	Description
Last Sent for Resourcing	This field displays the date and time information about the current job's progress evaluation was last sent to People Planner.
Last Retrieved from Resourcing	This field displays the date and time resource allocation information related to the current job's progress evaluation was last retrieved from People Planner.
Resource Allocation Complete	This field indicates whether you are done with resource allocations for the current job. Update the field value as needed.

Tab Actions

Button	Description
New Progress Evaluation	Copy to come.
Approval	Copy to come.
Resourcing	This drop-down list includes the following actions:

Button	Description
	<ul style="list-style-type: none"> ▪ Send for Resourcing - Click this action to send the job to People Planner. ▪ Retrieve Resourcing for Forecast - When you click this action, Maconomy retrieves resource allocation from People Planner. When you click the Resource Forecast icon on a sub-tab line, the Resource Forecast wizard then displays the updated data that Maconomy retrieved from People Planner. <p>This drop-down list and the actions in it only display if:</p> <ul style="list-style-type: none"> ▪ The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. ▪ The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the current job.
Other Actions	<p>In the Progress Evaluation workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Calculate Pending Registrations - Copy to come.

Tasks Sub-Tab

This section describes the fields and actions on the Tasks sub-tab of the Progress Evaluation tab in the Progress Evaluation workspace.





Sub-Tab Fields

Field	Description
Resource Booking	<p>Click this icon to display the Resource Booking wizard, which contains the embedded People Planner Progress Evaluation Assistant web component.</p> <p>The Progress Evaluation web component displays resource planning related specifically to the current progress evaluation line.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> ▪ The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. ▪ The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current line. <p>For more information about this web component and its related procedures, search on "Progress Evaluation Assistant" in the Deltak People Planner Web Components Guide.</p>

Field	Description
	<p>Note: While you can view the web components embedded in Maconomy on your tablet, some actions are only available via right-click menus, and the right-click function is not supported on tablets. Deltek recommends that you view these web components on desktop browsers.</p>
Resource Forecast	<p>Click the icon to display the Resource Forecast wizard, which contains Maconomy data retrieved from People Planner.</p> <p>This icon only displays if:</p> <ul style="list-style-type: none"> The company-specific Enable People Planner Web system parameter is enabled in your Workspace Client application. The Use Imported Budget Line Resource Allocation job parameter attribute is enabled on the job related to the current progress evaluation line.
Description	Copy to come.
Activity Type	Copy to come.
Total Baseline	Copy to come.
Actual	Copy to come.
Suggested ETC	Copy to come.
ETC	Copy to come.
Current Estimate	Copy to come.
Previous Estimate	Copy to come.
Deviation Previous	Copy to come.
Deviation Baseline	Copy to come.
Completion	Copy to come.
Rounding Difference	Copy to come.

Field	Description
Booking Type	Copy to come.
Belongs to Planning Budget	Copy to come.

Sub-Tab Actions




Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.



History Tab

This section describes the fields and actions on the History tab of the Progress Evaluation workspace.

Copy to come.

Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.





Button	Description
	
	Click this icon to open the Customize Columns window.

Hours Sub-Tab

This section describes the fields and actions on the Hours sub-tab of the History tab in the Progress Evaluation workspace.

Copy to come.

Sub-Tab Actions


Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to maximize the table view.
	Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.




Cost Sub-Tab

This section describes the fields and actions on the Cost sub-tab of the History tab in the Progress Evaluation workspace.

Copy to come.

Sub-Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet.

Button	Description
	Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	Click this icon to open the Customize Columns window.

Progress Evaluation Procedures

This section describes the steps you need to follow to work with progress evaluations.

Create a Progress Evaluation

If you are a project manager (or someone with a similar function), you can perform progress evaluations at various points during the life cycle of a job. This allows you to analyze how the various tasks are progressing and adjust your estimates if needed.

To create a progress evaluation on a job:

1. Under the Jobs menu section, go to **Jobs » Progress Evaluation » Progress Evaluation tab**.
2. Use the search filter and/or the **Search** field to select the job on which you want to perform a progress evaluation.
3. Click **Reopen Budget**, then **New Progress Evaluation**.
Maconomy displays the New Progress Evaluation wizard.
4. In the **Estimate Date** field, click the calendar icon to select a date. You can also type in the date.
5. Click **New Progress Evaluation**.
Maconomy updates the line fields in the Planning Budget Lines sub-tab. These lines correspond to the tasks/lines of your working budget for the job.
If the job is using **Time** as the unit of measure, the **Actual** field displays the number of hours or days spent on each task as of the estimate date specified. The values of the other fields on each line are also updated accordingly.
If the job is using **Cost Price** as the unit of measure, the **Actual** field displays the amount spent on each task as of the estimate date specified. The values of the other fields on each line are also updated accordingly.
6. If you need to adjust your estimates on a task, click the **ETC** field on the line and enter a new value. Repeat this step for each task that you need to update.

7. Press ENTER.

Maconomy saves your changes and refreshes the page. The application also updates the other field values on the line/s based on the new value/s you entered on the **ETC** field.

8. Click **Approve Budget** to finish working on the progress evaluation.

Any updates you made in the Progress Evaluation workspace are reflected in the job's working budget.

WIP Invoice

The WIP Invoice workspace allows you to create and maintain WIP invoices for your jobs.

WIP Invoice Concepts

You can:

- Prepare invoices and credit memos.
- View and edit foundation and specifications on draft invoices.
- Reallocate entries on WIP invoices.
- Review and approve invoices for posting.
- View historical invoices.

This workspace is listed under the Jobs section of the menu.




WIP Invoice Fields

This section describes the fields and actions on the WIP Invoice workspace.

Card Part Fields

Copy to come.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
	Click to display the list view.
	Click to display the detailed view.

Button	Description
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit	<p>Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Approve	<p>Click this action button to approve the current record.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Reject...	<p>Click this action button to reject the current record.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Other Actions	<p>In the WIP Invoice workspace, this dropdown list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Show Summary ▪ Show Detailed Specification ▪ Restore Editing, Detailed Specification ▪ Remove Other Drafts ▪ Restore Editing, Summary ▪ Copy Editing from Invoice... ▪ Copy Editing from Draft... ▪ Text Wrapping... ▪ Undo Approval/Reject

Invoice Selection Tab

This section describes the fields and actions on the Invoice Selection tab of the WIP Invoice workspace.






Copy to come.

Selection Sub-Tab

This section describes the fields and actions on the Selection sub-tab of the WIP Invoice workspace.

Copy to come.

Sub-Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.






Direct Invoicing Sub-Tab

This section describes the fields and actions on the Direct Invoicing sub-tab of the WIP Invoice workspace.

Copy to come.

Sub-Tab Actions

Button	Description
+ Add Invoice Selection Line	Copy to come.

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Invoice Editing Tab





This section describes the fields and actions on the Invoice Editing tab of the WIP Invoice workspace.


Tab Fields

Field	Description
Draft Number	Copy to come.
Bill To Customer	Copy to come.
Bill To Customer Name	Copy to come.
Billing Price	Copy to come.
Billing Price Up/Down	Copy to come.
Created On	Copy to come.
Created By	Copy to come.
Submitted	Copy to come.

Field	Description
Approved	Copy to come.
Blanket Draft	Copy to come.

Tab Actions

Button	Description
Submit Draft	Copy to come.
Close Editing	Copy to come.
Reopen Editing	Copy to come.
Other Actions	<p>In the Invoice Editing tab, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> Show Summary Show Detailed Specification Restore Editing, Detailed Specification Remove Other Drafts Attach Document Restore Editing, Summary Copy Editing from Invoice... Copy Editing from Draft... Text Wrapping...
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>

Button	Description
	Click this icon to open the Customize Columns window.


Documents Sub-Tab

This section describes the fields and actions on the Documents sub-tab of the Invoice Editing tab in the WIP Invoice workspace.

Sub-Tab Fields

Field	Description
Document	This field displays the file name of the document attached to the draft invoice. The field is automatically filled in by Maconomy and cannot be changed manually. Click on the file name to download the document.
Type	This field displays the file type/format of the document attached to the draft invoice (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the draft invoice.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the draft invoice.
Changed By	This field displays the name of the last user to upload the file/document to the current draft invoice.
Remark	Enter any additional remarks in this field.

Sub-Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Documents sub-tab, choose from the following actions: <ul style="list-style-type: none"> ▪ Update Document ▪ Delete Document ▪ View Document






Invoice History Tab

This section describes the fields and actions on the Invoice History tab of the WIP Invoice workspace.

Tab Fields

Field	Description
Invoice No.	Copy to come.
Type	Copy to come.
Invoice Date	Copy to come.
Bill to Customer	Copy to come.
Amount Incl. Tax	Copy to come.
Billing Price Up/Down	Copy to come.
Due Date	Copy to come.
Payment Status	<p>This field displays the following payment statuses of invoices, pre-invoices, and credit memos:</p> <ul style="list-style-type: none"> ▪ Due - Copy to come. ▪ Not Due - Copy to come. ▪ N/A - Copy to come. ▪ Paid - Copy to come. ▪ Reconciled - Copy to come. ▪ Not Reconciled - Copy to come. ▪ Partially Reconciled - The amount due for the job invoice is partially paid. The status is color-coded yellow if the invoice has a remaining balance and red if there are payments made but the balance is due. This is in the currency of your invoice.
Remainder	This field displays the remaining balance of your invoice, pre-invoice, or credit memo, in the currency of your invoice.

Tab Actions




Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.



Reallocate Entries Tab

This section describes the fields and actions on the Reallocate Entries tab of the WIP Invoice workspace.

Copy to come.

Tab Actions

Button	Description
Select all Entries	Copy to come.
Deselect all Entries	Copy to come.
Reallocate Entries To	Copy to come.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.

Button	Description
	
	Click this icon to open the Customize Columns window.

WIP Invoice Procedures

This section describes the steps you need to follow to work with WIP invoices.

Submit a WIP Draft Invoice

To create a WIP invoice for a job, you must first submit the draft for approval. Note that this applies only if you have set up approval hierarchies for draft invoices.

To submit a draft invoice:

1. Under the Jobs menu section, go to **WIP Invoice » Invoice Editing tab**.
2. Use the search filter and/or the **Search** field to select a draft invoice.
3. Click **Save**.
4. Click **Submit Draft**.

Approve or Reject a WIP Draft Invoice

To issue a WIP invoice, you must first approve the draft. Note that this applies only if you have set up approval hierarchies for draft invoices.

To approve or reject a draft invoice:

1. Under the Jobs menu section, go to **WIP Invoice » Invoice Editing tab**.
2. Use the search filter and/or the **Search** field to select a draft invoice.
3. To approve the draft invoice:
 - a) Click **Approve**.
4. To reject the draft invoice:
 - a) Click **Reject...**
Maconomy displays the Reject Draft Invoice wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Attach Documents to a Draft Invoice

Use these steps to attach documents to a draft invoice.

To attach documents to a draft invoice:

1. Under the Jobs menu section, go to **Jobs sub-menu » WIP Invoice workspace » Invoice Editing tab**.
2. Select a draft invoice from the filter list.
3. From the **Other Actions** drop-down list, select **Attach Document**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the file/s that you want to upload.
6. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy saves your changes, and lists the new attachment/s in the Documents sub-tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents sub-tab. Click **Save**, or press ENTER to save the information.

View a Document

You can view any document listed in the Documents sub-tab.

To view a task:

1. Under the Jobs menu section, go to **Jobs » WIP Invoice » Invoice Editing**.
2. Select a draft invoice from the filter list.
3. In the Documents sub-tab, select a line.
4. Click **Row Tools » View Document** on the line.
The file is downloaded to your computer/device.

Start a Conversation

You can use the conversations functionality to correspond about a specific record or transaction with other employees in your company.

To start a conversation:

1. Go to the relevant workspace.
2. Select a record or transaction from the filter list.
The Messages pane is found on the right-hand side of the workspace.
3. In the input area of the Messages pane, type your message. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Reply to a Conversation

Use the speech bubble icon in the top right corner of the menu to quickly view and respond to conversations.

To reply to a conversation:

1. To expand the Message Center, click the speech bubble icon.
2. From the dropdown list, expand a record or transaction and click on the message to which you want to reply.
Maconomy navigates to the relevant workspace, and opens the Messages pane for the record or transaction you selected.
3. In the input area, type your reply. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Invoice on Account

The Invoice on Account workspace allows you to create and maintain on account invoices for your jobs.

Invoice on Account Concepts

You can:

- Prepare invoices and credit memos.
- Create invoicing plans and transfer invoice lines for on account invoices.
- View and edit foundation and specifications on draft invoices.
- Review and approve invoices for posting.
- View historical invoices.

This workspace is listed under the Jobs section of the menu.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notification is included:

- **Invoicing Plan Due** - Appears for the user to indicate an invoicing plan is due in five days or less. This notification points to the Invoice on Account workspace.




Invoice on Account Fields

This section describes the fields and actions on the Invoice on Account workspace.

Card Part Fields

Copy to come.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. <div>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</div>
Approve	Click this action button to approve the current record.



Button	Description
	<p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Reject...	<p>Click this action button to reject the current record.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Other Actions	<p>In the Invoice on Account workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Show Summary ▪ Show Detailed Specification ▪ Restore Editing, Detailed Specification ▪ Remove Other Drafts ▪ Restore Editing, Summary ▪ Copy Editing from Invoice... ▪ Copy Editing from Draft... ▪ Text Wrapping... ▪ Undo Approval/Reject




Invoice on Account Tab

This section describes the fields and actions on the Invoice on Account tab of the Invoice on Account workspace.

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Specification Table Actions

Button	Description
+ Add Job Invoice On Account Entry	Copy to come.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>






Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Invoicing Plan Tab

This section describes the fields and actions on the Invoicing Plan tab of the Invoice on Account workspace.

Copy to come.

Tab Actions

Button	Description
+ Add Invoicing Plan Line	Copy to come.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Invoice Editing Tab






This section describes the fields and actions on the Invoice Editing tab of the Invoice on Account workspace.

Tab Fields

Field	Description
Draft Number	Copy to come.
Bill To Customer	Copy to come.
Bill To Customer Name	Copy to come.
Billing Price	Copy to come.
Billing Price Up/Down	Copy to come.
Created On	Copy to come.
Created By	Copy to come.
Submitted	Copy to come.
Approved	Copy to come.
Blanket Draft	Copy to come.

Tab Actions

Button	Description
Submit Draft	Copy to come.
Close Editing	Copy to come.
Reopen Editing	Copy to come.
Other Actions	<p>In the Invoice Editing tab, this drop-down list includes the following actions:</p> <ul style="list-style-type: none">▪ Show Summary▪ Show Detailed Specification▪ Restore Editing, Detailed Specification

Button	Description
	<ul style="list-style-type: none"> Remove Other Drafts Attach Document Restore Editing, Summary Copy Editing from Invoice... Copy Editing from Draft... Text Wrapping...
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Documents Sub-Tab


This section describes the fields and actions on the Documents sub-tab of the Invoice Editing tab in the Invoice on Account workspace.

Sub-Tab Fields

Field	Description
Document	<p>This field displays the file name of the document attached to the draft invoice. The field is automatically filled in by Maconomy and cannot be changed manually.</p> <p>Click on the file name to download the document.</p>
Type	<p>This field displays the file type/format of the document attached to the draft invoice (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.</p>
Size	<p>This field displays the file size (in bytes) of the document attached to the draft invoice.</p>

Field	Description
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the draft invoice.
Changed By	This field displays the name of the last user to upload the file/document to the current draft invoice.
Remark	Enter any additional remarks in this field.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Documents sub-tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Update Document ▪ Delete Document ▪ View Document

Invoice History Tab






This section describes the fields and actions on the Invoice History tab of the Invoice on Account workspace.

Tab Fields

Field	Description
Invoice No.	Copy to come.
Type	Copy to come.
Invoice Date	Copy to come.
Bill to Customer	Copy to come.
Amount Incl. Tax	Copy to come.
Billing Price Up/Down	Copy to come.
Due Date	Copy to come.

Field	Description
Payment Status	<p>This field displays the following payment statuses of invoices, pre-invoices, and credit memos:</p> <ul style="list-style-type: none"> ▪ Due - Copy to come. ▪ Not Due - Copy to come. ▪ N/A - Copy to come. ▪ Paid - Copy to come. ▪ Reconciled - Copy to come. ▪ Not Reconciled - Copy to come. ▪ Partially Reconciled - The amount due for the job invoice is partially paid. The status is color-coded yellow if the invoice has a remaining balance and red if there are payments made but the balance is due. This is in the currency of your invoice.
Remainder	<p>This field displays the remaining balance of your invoice, pre-invoice, or credit memo, in the currency of your invoice.</p>

Tab Actions

Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Invoice on Account Procedures

This section describes the steps you need to follow to work with invoices on account.

Submit a Draft Invoice on Account

To create an invoice on account for a job, you must first submit the draft for approval. Note that this applies only if you have set up approval hierarchies for draft invoices.

To submit a draft invoice:

1. Under the Jobs menu section, go to **Invoice on Account » Invoice Editing tab**.
2. Use the search filter and/or the **Search** field to select a draft invoice.
3. Click **Save**.
4. Click **Submit Draft**.

Approve or Reject a Draft Invoice on Account

To issue an invoice on account, you must first approve the draft. Note that this applies only if you have set up approval hierarchies for draft invoices.

To approve or reject a draft invoice:

1. Under the Jobs menu section, go to **Invoice on Account » Invoice Editing tab**.
2. Use the search filter and/or the **Search** field to select an invoice.
3. To approve the draft invoice:
 - a) Click **Approve**.
4. To reject the draft invoice:
 - a) Click **Reject...**
Maconomy displays the Reject Draft Invoice wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Attach Documents to a Draft Invoice

Use these steps to attach documents to a draft invoice.

To attach documents to a draft invoice:

1. Under the Jobs menu section, go to **Jobs sub-menu » Invoice on Account workspace » Invoice Editing tab**.
2. Select a draft invoice from the filter list.
3. From the **Other Actions** drop-down list, select **Attach Document**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the file/s that you want to upload.
6. Click **Open**, or press ENTER.

Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy saves your changes, and lists the new attachments in the Documents sub-tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents sub-tab. Click **Save**, or press ENTER to save the information.

View a Document

You can view any document listed in the Documents sub-tab.

To view a document:

1. Under the Jobs menu section, go to **Jobs » Invoice on Account » Invoice Editing**.
2. Select a draft invoice from the filter list.
3. In the Documents sub-tab, select a line.
4. Click **Row Tools » View Document** on the line.
The file is downloaded to your computer/device.

Start a Conversation

You can use the conversations functionality to correspond about a specific record or transaction with other employees in your company.

To start a conversation:

1. Go to the relevant workspace.
2. Select a record or transaction from the filter list.
The Messages pane is found on the right-hand side of the workspace.
3. In the input area of the Messages pane, type your message. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Reply to a Conversation

Use the speech bubble icon in the top right corner of the menu to quickly view and respond to conversations.

To reply to a conversation:

1. To expand the Message Center, click the speech bubble icon.
2. From the dropdown list, expand a record or transaction and click on the message to which you want to reply.
Maconomy navigates to the relevant workspace, and opens the Messages pane for the record or transaction you selected.
3. In the input area, type your reply. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Reports

For information on the report workspaces under this submenu, go to [Reports](#) on page 433.

Draft Invoices

The Draft Invoices workspace lists all the draft invoices to which you have access, and lets you perform various actions.

Draft Invoices Concepts

You can:

- Edit a draft invoice, or finalize it.
- Submit a finalized invoice.
- Approve an invoice.
- Print an invoice.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notifications are included:

- **Submit Invoice Draft** - Appears for the user after an invoice selection is approved to indicate that draft invoices are ready for completion. This notification points to the Draft Invoices workspace.

- **Print Job Invoice** - Appears for the user after a job invoice draft/draft credit note is approved to indicate that the approved drafts need to be printed. This notification points to the Draft Invoices workspace.
- **Rejected Invoice Draft** - Appears for the user to indicate a submitted draft invoice has been rejected. This notification points to the Draft Invoices workspace.




Draft Invoices Fields

This section describes the fields and actions on the Draft Invoices workspace.

Card Part Fields

Copy to come.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit Draft	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.
Approve	Click this action button to approve the current record. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.
Reject	Click this action button to reject the current record.



Button	Description
	<div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies. </div>
Close Editing	Copy to come.
Reopen Editing	Copy to come.
Print Draft	Copy to come.
Other Actions	<p>In the Draft Invoices workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Show Summary ▪ Show Detailed Specification ▪ Restore Editing, Detailed Specification ▪ Remove Other Drafts ▪ Restore Editing, Summary ▪ Copy Editing from Invoice... ▪ Copy Editing from Draft... ▪ Text Wrapping... ▪ Undo Approval/Reject




Draft Editing Tab

This section describes the fields and actions on the Draft Editing tab of the Draft Invoices workspace.

Copy to come.

Tab Actions

Button	Description
+ Add Invoice Line	Copy to come.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>






Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Foundation Tab

This section describes the fields and actions on the Foundation tab of the Draft Invoices workspace.

Copy to come.

Tab Actions

Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>




Documents Sub-Tab




This section describes the fields and actions on the Documents sub-tab of the Draft Invoices workspace.

Sub-Tab Fields

Field	Description
Document	This field displays the file name of the document attached to the draft invoice. The field is automatically filled in by Maconomy and cannot be changed manually. Click on the file name to download the document.
Type	This field displays the file type/format of the document attached to the draft invoice (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the draft invoice.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the draft invoice.
Changed By	This field displays the name of the last user to upload the file/document to the current draft invoice.
Remark	Enter any additional remarks in this field.

Sub-Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Documents sub-tab, choose from the following actions: <ul style="list-style-type: none"> ▪ Update Document ▪ Delete Document ▪ View Document
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.

Button	Description
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Draft Invoices Procedures

This section describes the steps you need to follow to work with draft invoices.

Submit a Draft Invoice

To create an invoice for a job, you must first submit the draft for approval. Note that this applies only if you have set up approval hierarchies for draft invoices.

To approve or reject a draft invoice:

1. Under the Jobs menu section, go to the Draft Invoices workspace.
2. Use the search filter and/or the **Search** field to select a draft invoice.
3. Click **Submit Draft**.

Approve or Reject a Draft Invoice

To issue an invoice, you must first approve the draft. Note that this applies only if you have set up approval hierarchies for draft invoices.

To approve or reject a draft invoice:

1. Under the Jobs menu section, go to the Draft Invoices workspace.
2. Use the search filter and/or the **Search** field to select a draft invoice.
3. To approve the draft invoice:
 - a) Click **Approve**.
4. To reject the draft invoice:
 - a) Click **Reject...**
Maconomy displays the Reject Draft Invoice wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Attach Documents to a Draft Invoice

Use these steps to attach documents to a draft invoice.

To attach documents to a draft invoice:

1. Under the Jobs menu section, go to the Draft Invoices workspace.
2. Select a draft invoice from the filter list.
3. From the **Other Actions** drop-down list, select **Attach Document**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the file/s that you want to upload.
6. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy saves your changes, and lists the new attachments in the Documents sub-tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents sub-tab. Click **Save**, or press ENTER to save the information.

View a Document

You can view any document listed in the Documents sub-tab.

To view a document:

1. Under the Jobs menu section, go to the Draft Invoices workspace.
2. Select a draft invoice from the filter list.
3. In the Documents sub-tab, select a line.
4. Click **Row Tools » View Document** on the line.
The file is downloaded to your computer/device.

Start a Conversation

You can use the conversations functionality to correspond about a specific record or transaction with other employees in your company.

To start a conversation:

1. Go to the relevant workspace.

2. Select a record or transaction from the filter list.
The Messages pane is found on the right-hand side of the workspace.
3. In the input area of the Messages pane, type your message. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Reply to a Conversation

Use the speech bubble icon in the top right corner of the menu to quickly view and respond to conversations.

To reply to a conversation:

1. To expand the Message Center, click the speech bubble icon.
2. From the dropdown list, expand a record or transaction and click on the message to which you want to reply.
Maconomy navigates to the relevant workspace, and opens the Messages pane for the record or transaction you selected.
3. In the input area, type your reply. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Job Invoices

The Job Invoices workspace enables you to easily view an existing job invoice and create a credit memo based on it.

Job Invoices Concepts

You can:

- Review invoices and associated job entries.
- Edit the bill-to-customer address before reprinting an invoice.
- Create, submit, and approve a credit memo based on the selected invoice.
- Filter and view selected invoices or credit memos using selection criteria.

This workspace is listed under the Jobs section of the menu.




Job Invoices Fields

This section describes the fields and actions on the Job Invoices workspace.

Card Part

Field	Description
Invoice Number	This field displays the invoice number.
Customer	This field displays the name and number of the customer being invoiced.
Job	This field displays the name and number of the job being invoiced.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action to undo changes made to the current record, or to any of its lines.

Overview Tab

This section describes the fields and actions on the Overview tab of the Job Invoices workspace.

Tab Fields

Field	Description
Debit/Credit	This field displays whether the current record is an invoice or a credit memo. Possible values are: <ul style="list-style-type: none">▪ Debit - This is displayed if the current record is an invoice.▪ Credit - This is displayed if the current record is a credit memo.

Field	Description
Invoice Type	This field displays the type of invoice. Possible values are: <ul style="list-style-type: none"> ▪ T&M ▪ On Account ▪ T&M and On Account ▪ Pre-Invoice ▪ 0-Invoice
Invoice Date	This field displays the date the invoice was issued.
Due Date	This field displays the date on which payment is due for the job invoice.
Payment Status	This field displays the following payment statuses of invoices, pre-invoices, and credit memos: <ul style="list-style-type: none"> ▪ Due ▪ Not Due ▪ N/A ▪ Paid ▪ Reconciled ▪ Not Reconciled ▪ Partially Reconciled - The amount due for the job invoice is partially paid. The status is color-coded yellow if the invoice has a remaining balance and red if there are payments made but the balance is due. This is in the currency of your invoice.
Remainder	This field displays the remaining balance of your invoice, pre-invoice, or credit memo, in the currency of your invoice.
Price Breakdown	C This field displays the price to be paid. Click the amount to display an info bubble with the details of the breakdown.
Billing Address	This field displays the address of the bill-to customer. Update the information as needed.

Details Island

Note: This island is collapsed by default.

Field	Description
Invoice Name	This field displays the invoice name. Update the information as needed.

Field	Description
Job	This field displays the job number on the invoice.
Blanket Invoice	This field displays whether the current record is included in a blanket invoice.
Time Unit	This field displays the time unit used for prices on time activities on the job.
Created	This field displays the date the invoice was created, and the name of the employee who created it.
Approved	This field displays the date the invoice was approved, and the name of the employee who approved it.
Printed	This field displays the date the invoice was printed, and the name of the employee who printed it.
Invoiced on Account	This field displays the amount invoiced on account on the current invoice.
Amount Reconciled	This field displays the amount reconciled on the current invoice.
Tax Reconciled	This field displays the tax amount reconciled on the current invoice.
Fully Reconciled	C This field displays whether the current invoice is fully reconciled.

Tab Actions

Button	Description
Print Copy	Click this action to print a copy of the invoice.

Specification Sub-Tab






This section describes the fields and actions on the Specification sub-tab under the Overview tab of the Job Invoices workspace.

Sub-Tab Fields

Field	Description
Description	This field displays information regarding the current line.
Quantity	This field displays the number of units sold on the current line.
Unit Price	This field displays the unit price.

Field	Description
Billing Price Total	This field displays the total billing price for the current line.

Sub-Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Foundation Sub-Tab

This section describes the fields and actions on the Foundation sub-tab under the Overview tab of the Job Invoices workspace.

Sub-Tab Fields

Note: This tab and its fields are only available if you are working on a T&M invoice.

Field	Description
Entry Date	This field displays the entry date for the current line.
Billing Price Up/Down, Currency	This field displays the write up/down billing price on the current line in the job currency.
Billing Price, Currency	This field displays the billing price on the current line in the job currency.

Field	Description
Billing Price, Total, Currency	This field displays the total billing price on the current line in the job currency.
Task	This field displays the task associated with the current line.
Quantity, Up/Down	This field displays the write-up/down quantity on the current line.
Quantity	This field displays the quantity to be invoiced from the current line.
Employee Name	This field displays the name of the employee responsible for the current line.
Activity Number	This field displays the activity number associated with the current line.
Activity Name	This field displays the name of the activity associated with the current line.
Transaction Number	This field displays the transaction number associated with the current line.
Description	This field displays information regarding the current line.

Reconciliations Sub-Tab

This section describes the fields and actions on the Reconciliations sub-tab under the Overview tab of the Job Invoices workspace.






Sub-Tab Fields

Note: This sub-tab and its fields are available only when reconciling customer invoices.

Field	Description
Reconciling Invoice Number	This field displays the number of the reconciling invoice.
Reconciling Job Name	This field displays the number of the reconciling job.
Reconciliation Date	This field displays the latest entry date for the current entry and all the entries that have been reconciled against the current line.
Debit/Credit	This field displays whether the current line is reconciled to a debit or credit entry.
Amount Reconciled	This field displays the amount reconciled on the current line.

Field	Description
Tax Reconciled	This field displays the tax amount reconciled on the current line.
Reconciling Bill to Customer	This field displays the customer who was invoiced on the current line.
Invoice Allocation	This field displays the number of the job invoice allocation.
Reversal Entry	This field displays the number of the reversed job invoice allocation, if the current line is a reversal of a previous allocation.

Sub-Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

On Account Reconciliations Sub-Tab

This section describes the fields and actions on the On Account Reconciliations sub-tab under the Overview tab of the Job Invoices workspace.

Sub-Tab Fields

Note: This tab and its fields are available only when you are working on an invoice on account.

Field	Description
Invoice Number	This field displays the number of the reconciled invoice on account.
Debit/Credit	<p>This field displays whether the current line is related to a job invoice or job credit memo on account.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> ▪ Debit - This is displayed if the current line is reconciled against an invoice on account. ▪ Credit - This is displayed if the current line is reconciled against a credit memo on account.
Amount Reconciled	This field displays the amount that has been reconciled on the current line.
Tax Reconciled	This field displays the tax amount that has been reconciled on the current line.
Job Number	This field displays the job number of the invoice on account on the current line.
Job Name	This field displays the name of the job specified in the Job No. field on the current line.

Documents Sub-Tab







This section describes the fields and actions on the Documents sub-tab under the Overview tab of the Job Invoices workspace.

Sub-Tab Fields

Field	Description
Document	<p>This field displays the file name of the document attached to the draft invoice. The field is automatically filled in by Maconomy and cannot be changed manually.</p> <p>Click on the file name to download the document.</p>
Type	This field displays the file type/format of the document attached to the draft invoice (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the draft invoice.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the draft invoice.
Changed By	This field displays the name of the last user to upload the file/document to the current draft invoice.

Field	Description
Remark	Enter any additional remarks in this field.

Sub-Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Documents sub-tab, choose from the following actions: <ul style="list-style-type: none"> ▪ View Document
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Crediting Tab

This section describes the fields and actions on the Crediting tab of the Job Invoices workspace.

Tab Fields

Note: This tab and its fields are only when working on invoices. You can create a credit memo based on the current invoice.

Field	Description
Debit/Credit	This field displays whether the current record is an invoice or a credit memo. Possible values are: <ul style="list-style-type: none"> ▪ Debit - This is displayed if the current record is an invoice. ▪ Credit - This is displayed if the current record is a credit memo.

Field	Description
Invoice Type	This field displays the type of invoice. Possible values are: <ul style="list-style-type: none"> ▪ T&M ▪ On Account ▪ T&M and On Account ▪ Pre-Invoice ▪ 0-Invoice
Invoice Date	This field displays the date the invoice was issued.
Due Date	This field displays the date on which payment is due for the credit memo.
Payment Status	This field displays the following payment statuses of invoices, pre-invoices, and credit memos: <ul style="list-style-type: none"> ▪ Due - Copy to come. ▪ Not Due - Copy to come. ▪ N/A - Copy to come. ▪ Paid - Copy to come. ▪ Reconciled - Copy to come. ▪ Not Reconciled - Copy to come. ▪ Partially Reconciled- The amount due for the job invoice is partially paid. The status is color-coded yellow if the invoice has a remaining balance and red if there are payments made but the balance is due. This is in the currency of your invoice.
Remainder	This field displays the remaining balance of your invoice, pre-invoice, or credit memo, in the currency of your invoice.
Price Breakdown	This field displays the price to be paid. Click the amount to display an info bubble with the details of the breakdown.
Job Invoicing	Copy to come.
Billing Address	This field displays the address of the bill-to customer. Update the information as needed.

Details Island

Note: This island is collapsed by default.

Field	Description
Invoice Name	This field displays the invoice name. Update the information as needed.
Job	This field displays the job number on the credit memo.
Blanket Invoice	This field displays whether the current record is included in a blanket invoice.
Time Unit	This field displays the time unit used for prices on time activities on the job.
Created	This field displays the date the credit memo was created, and the name of the employee who created it.
Approved	This field displays the date the credit memo was approved, and the name of the employee who approved it.
Printed	This field displays the date the credit memo was printed, and the name of the employee who printed it.
Invoiced on Account	This field displays the amount invoiced on account on the current credit memo. Note: This field is shown only for credit memos based on invoices on account.
Amount Reconciled	This field displays the amount reconciled on the current credit memo. Note: This field is shown only for credit memos based on invoices on account.
Tax 1-3 Reconciled	These fields display the tax amount reconciled on the current credit memo. Note: This field is shown only for credit memos based on invoices on account.
Fully Reconciled	This field displays whether the current credit memo is fully reconciled. Note: This field is shown only for credit memos based on invoices on account.

Tab Actions

Button	Description
Create Credit Memo Selection...	Copy to come.

Button	Description
Approve Credit Memo Selection	Click this action to approve the current credit memo for editing. The specification of the draft credit memo is shown in the New Specification sub-tab.

Attention: The following actions are available only after credit memo approval.

Button	Description
Print Draft	Click this action to print the draft credit memo.
Print Credit Memo	Click this action to print the credit memo.
Submit Draft	Click this action to submit the draft memo.
Approve Draft	Click this action to approve the draft memo.
Reopen Editing	Click this action to reopen an approved credit memo for editing.
Close Editing	Click this action to close editing on the draft memo.

New Specification Sub-Tab

This section describes the fields and actions on the New Specification sub-tab under the Crediting tab of the Job Invoices workspace.

Sub-Tab Fields

Field	Description
Standard Text Code	This field displays the text code, if the current line is based on a standard invoicing text code.
Description	This field displays information regarding the current line.
Quantity	This field displays the quantity for invoicing on the current line.
Billing Price	This field displays the billing price per unit.
Billing Price Total	This field displays the total billing price in for the current line. This field displays the amount invoiced before tax, and any discount and on account reductions on T&M invoices.
Total Price Only	Select this field to exclude unit price and quantity from time and/or amount activities on the current line.

Invoices Procedures

This section describes the steps you need to follow to work with credit memos.

Create a Credit Memo

When you post invoices on a job, you can also craft a credit memo to give partial or full credit on an invoice, credit individual job entries, or perform crediting for a certain date range. In this workspace, you can choose an existing invoice and create a credit memo based on it.

Before you can create a credit memo, you must perform invoice selection. Depending on the job setup, you can do this in either the WIP Invoice workspace or Invoice on Account workspace.

To create a credit memo:

1. Under the Jobs menu section, go to **Invoices > Crediting tab**.
2. Click **Create Credit Memo Selection...**
The Create Credit Memo Selection wizard displays.
3. If the invoice contains T&M entries, choose whether you want to restore job entries.
4. Select the preferred date for your credit memo.
5. Click **Create** to create the credit memo selection.
6. Click **Approve Credit Memo Selection** to create the credit memo specification. You can now edit the specification in the New Specification sub-tab.
7. Click **Close Editing** when editing is completed.

Note: This only applies if approval hierarchies are not used.

Print a Draft Credit Memo

Use these steps to print a draft memo.

To print a draft memo:

1. Under the Jobs menu section, go to **Invoices > Crediting tab**.
2. Use the search filter and/or the **Search** field to select a credit memo.
3. Click **Print Draft**.

Submit a Draft Credit Memo

To credit an invoice on a job, you must first submit the draft for approval. Note that this applies only if you have set up approval hierarchies for draft invoices.

To submit a draft memo:

1. Under the Jobs menu section, go to **Invoices > Crediting tab**.
2. Use the search filter and/or the **Search** field to select a credit memo.
3. In the New Specification sub-tab, fill out the fields as needed.
4. Click **Save**.

5. Click **Submit Draft**.

Approve a Draft Credit Memo

To issue a credit memo, you must first approve the draft. Note that this applies only if you have set up approval hierarchies for draft invoices.

To approve a draft memo:

1. Under the Jobs menu section, go to **Invoices > Crediting tab**.
2. Use the search filter and/or the **Search** field to select a credit memo.
3. Click **Approve Draft**.

Print a Credit Memo

Once a draft memo is completed, you can print the credit memo.

To print a credit memo:

1. Under the Jobs menu section, go to **Invoices > Crediting tab**.
2. Use the search filter and/or the **Search** field to select a credit memo.
3. Click **Print Credit Memo**.

Resource Plans

Use the Resource Plans workspace to access the embedded People Planner Resource Plans web component.

This workspace is found under the Jobs menu section. It is only available if the company-specific **Enable People Planner Web** system parameter is enabled in the corresponding Workspace Client application.

Resource Plans Concepts

This workspace allows resource managers and others with similar roles to perform project planning tasks on multiple jobs at a time in Maconomy.

The Resource Plans workspace utilizes the same layout as when working on one job. However, it provides more flexibility to easily view assignments or bookings across several jobs to help you plan and prioritize accordingly.

For more information about the Resource Plans web component and related procedures, search on "Resource Plans" in the [Deltak People Planner Web Components Guide](#).

Job Reports

For information on the report workspaces under this submenu, go to [Job Reports](#) on page 434.

Job Analyzers Submenu

The Maconomy web client supports the Analyzer report functionality. The application includes two report templates that are available via dedicated workspaces: a basic and an advanced report template for querying job data.

Both of these report workspaces are found under the Job Analyzers submenu.

Job Analyzer Concepts

Use the Job Analyzer report workspaces to make ad hoc queries to the database and view the query results in table form.

Specifically, you can:

- Customize and run a report.
- Run saved reports.
- Edit saved reports.
- Export your report output to a spreadsheet.
- View finished reports, immediately after the report run or at any time after the fact.

Job Analyzer Workspaces

Job Analyzer Advanced Workspace

Advanced Maconomy users such as project controllers and back office users can use this report template workspace to generate customized reports that capture very specific information from or related to the jobs to which they have access.

For each report template workspace, you can create and save as many customized reports as you need and access these saved reports afterwards using the search filter and field at the top of the workspace.

Column Groups

The Job Analysis Advanced report allows users to add columns from the following groups:

- Job
 - Under this group are the following subgroups:
 - Job Group
 - Budget
 - Status
 - Employees
 - Description

- Company
- Ship to Customer
- Bill to Customer
- Main/Sub Jobs
- Registration
- Pricing
- Revenue Recognition
- Job Totals
- Extra Fields
- Employee
- Dates
- Registration Specific
- Task, Activity, Description
- Vendor
- G/L Dimensions, Entry
- Budgeted (Working Budget)
- Budgeted (Current Budget)
- Purchase Orders
- Accrued
- Registered
 - Executing Company
- Open
- Work in Progress
 - Capitalize at Cost
 - Capitalization at billing price
- Invoiced
 - Executing Company
- Invoice Bill to Customer
- Write Up/Down
- Revenue Recognized
- Planned Invoicing
- Invoiced on Account
- Transferred

- Transferred From
- Transferred To

Analyzer Report Fields

This section describes the fields and actions on a web Analyzer workspace.

Header Fields

Field	Description
Report title	Enter a title for the report you are customizing. You can also edit the title of an existing custom saved or finished report.

Header Actions

Button	Description
+ New Report	Click this action to create a customized report.
Run	Click this action to run the current customized report.
Save	Click this action to save your latest changes to your customized report.
Revert	Click this action to undo your latest edits to your customized report. Maconomy reverts to the last saved version.
Other Actions	<p>In a web Analyzer workspace, this dropdown list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Delete - Select this action to delete the current customized report. ▪ Import - Select this action to import another user's customized report to your application. ▪ Export - Select this action to export the current customized report and download it to your local storage. You can share this downloaded report layout file with other users, so they can import it into their application and run it themselves.

Column and Row Selection Tab

This section describes the fields and actions on the Column and Row Selection tab of a web Analyzer workspace.

Column Selection Pane




Use this pane to begin building your report or query. Select the columns you want to include in your customized report.

Pane Actions

Button	Description
+ Add column	Click this action to open the Select Columns dialog, where you can start adding columns to your customized report.

Pane Fields

Once you add columns to your report, the following fields and icons display on the pane.

Field	Description
	If you want to move the current column to a different location in the report, click this icon then drag and drop the column line to its new location.
Column Name	This field displays the name of the current column.
Subtotal	<p>Select this check box if you want your customized report to include subtotals for the current column.</p> <div> Note: After you add a value column to the report, this check box is grayed out for all non-value columns that come after the value column. </div>
Column Title	<p>If you want to rename the current column, enter your preferred name in this field.</p> <p>Maconomy automatically updates the column name in the Preview pane.</p>
	Click this icon to delete the current column from your customized report.
	Click this icon to add a new column after the current column line.

Row Selection Pane







Use this pane to specify criteria for selecting the records to display in your report output.

Pane Actions

Button	Description
+ Add row	Click this action to open the Select Columns dialog, where you can start adding the columns to which you want to apply selection criteria or filters.

Pane Fields

Once you select columns to filter for your report, the following fields display on the pane.

Field	Description
	If you want to move the current column and its restrictions to a different location in the pane, click this icon and drag and drop the column line to its new location.
	Click this icon to delete the current column and its restrictions.
	Click this icon to add a new column after the current column line.
Column Name	This field displays the name of the current column.
	If you want to move the current restriction to a different location under the relevant column, click this icon and drag and drop the restriction line to its new location.
Restrictions	<p>In the first field, select an operator from the dropdown list. The dropdown includes some or all of the following options:</p> <ul style="list-style-type: none"> ▪ = Equal to ▪ x...y Between ▪ < Less than ▪ > Greater than ▪ ≤ Less than or equal to ▪ ≥ Greater than or equal to ▪ ≠ Not equal to ▪ ∅ Is empty ▪ ¬∅ Is not empty <p>In the second field, type or select the value you want to use to filter values for the current column.</p>
	Click this icon to delete the current restriction line.
	If you want to specify more than one restriction for the current column, click this icon to add a new restriction after the current restriction line.

Preview Pane

Use this pane to preview the report you are customizing. If you are viewing a saved report or a finished report output, this pane also displays a preview for that. Switch to the full screen view




using the  **Full screen preview** icon on the top right corner of the pane.

Finished Report Tab

This section describes the fields and actions on the Finished Report tab of a web Analyzer workspace.

After you run a report, use this tab to view the output.

Tab Actions

Button	Description
	Click this icon to export the report output to a spreadsheet. Maconomy exports the report output, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the report output view to full screen. Click this icon to restore the default display size of the report output.

Job Analyzer Basic Workspace

This report template workspace is a simpler version of the Job Analysis Advanced workspace. It can be utilized by project managers and similar users to generate less complex customized reports about the jobs to which they have access.

For each report template workspace, you can create and save as many customized reports as you need and access these saved reports afterwards using the search filter and field at the top of the workspace.

Column Groups

The Job Analysis Basic report allows users to add columns from the following groups:

- Job
- Customer
- Entry Information
- Employee

- Registration
- Open
- Work in Progress
- Invoiced
- Invoice on Account
- Write Up/Down
- Revenue Recognized
- Budgeted (Working Budget)
- Budgeted (Current Budget)

Analyzer Report Fields

This section describes the fields and actions on a web Analyzer workspace.

Header Fields

Field	Description
Report title	Enter a title for the report you are customizing. You can also edit the title of an existing custom saved or finished report.

Header Actions

Button	Description
+ New Report	Click this action to create a customized report.
Run	Click this action to run the current customized report.
Save	Click this action to save your latest changes to your customized report.
Revert	Click this action to undo your latest edits to your customized report. Maconomy reverts to the last saved version.
Other Actions	<p>In a web Analyzer workspace, this dropdown list includes the following actions:</p> <ul style="list-style-type: none"> ■ Delete - Select this action to delete the current customized report. ■ Import - Select this action to import another user's customized report to your application. ■ Export - Select this action to export the current customized report and download it to your local storage. You can share this downloaded report layout file with other users, so they can import it into their application and run it themselves.

Column and Row Selection Tab

This section describes the fields and actions on the Column and Row Selection tab of a web Analyzer workspace.

Column Selection Pane




Use this pane to begin building your report or query. Select the columns you want to include in your customized report.

Pane Actions

Button	Description
+ Add column	Click this action to open the Select Columns dialog, where you can start adding columns to your customized report.

Pane Fields

Once you add columns to your report, the following fields and icons display on the pane.

Field	Description
	If you want to move the current column to a different location in the report, click this icon then drag and drop the column line to its new location.
Column Name	This field displays the name of the current column.
Subtotal	<p>Select this check box if you want your customized report to include subtotals for the current column.</p> <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>Note: After you add a value column to the report, this check box is grayed out for all non-value columns that come after the value column.</p> </div>
Column Title	<p>If you want to rename the current column, enter your preferred name in this field.</p> <p>Maconomy automatically updates the column name in the Preview pane.</p>
	Click this icon to delete the current column from your customized report.
	Click this icon to add a new column after the current column line.

Row Selection Pane





Use this pane to specify criteria for selecting the records to display in your report output.



Pane Actions

Button	Description
+ Add row	Click this action to open the Select Columns dialog, where you can start adding the columns to which you want to apply selection criteria or filters.

Pane Fields

Once you select columns to filter for your report, the following fields display on the pane.

Field	Description
	If you want to move the current column and its restrictions to a different location in the pane, click this icon and drag and drop the column line to its new location.
	Click this icon to delete the current column and its restrictions.
	Click this icon to add a new column after the current column line.
Column Name	This field displays the name of the current column.
	If you want to move the current restriction to a different location under the relevant column, click this icon and drag and drop the restriction line to its new location.
Restrictions	<p>In the first field, select an operator from the dropdown list. The dropdown includes some or all of the following options:</p> <ul style="list-style-type: none"> ■ = Equal to ■ x...y Between ■ < Less than ■ > Greater than ■ ≤ Less than or equal to ■ ≥ Greater than or equal to ■ ≠ Not equal to ■ ∅ Is empty ■ ¬∅ Is not empty <p>In the second field, type or select the value you want to use to filter values for the current column.</p>

Field	Description
	Click this icon to delete the current restriction line.
	If you want to specify more than one restriction for the current column, click this icon to add a new restriction after the current restriction line.

Preview Pane

Use this pane to preview the report you are customizing. If you are viewing a saved report or a finished report output, this pane also displays a preview for that. Switch to the full screen view






using the **Full screen preview** icon on the top right corner of the pane.

Finished Report Tab

This section describes the fields and actions on the Finished Report tab of a web Analyzer workspace.

After you run a report, use this tab to view the output.

Tab Actions

Button	Description
	Click this icon to export the report output to a spreadsheet. Maconomy exports the report output, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to maximize the report output view to full screen.
	Click this icon to restore the default display size of the report output.

Job Analyzer Procedures

This section describes the steps you need to follow to work with job Analyzer reports.

Customize and Run a Report

You can build your query by adding any of the columns available for your selected report template workspace, filter rows if you want to view even more specific information (and minimize performance issues), and preview the report before running it.

To customize and run a report:

1. Go to the workspace for the report template you want to use.
2. In the **Report title** field in the header, enter a name for your report.
3. Under the Column and Row Selection tab, go to the Column Selection pane and click **+ Add column**.
Maconomy opens the Select Columns dialog.
4. To customize the columns in your report:
 - a) You can use the filter and/or the search field at the top of the Select Columns dialog to quickly find each column you want to add to your report. Otherwise, expand the column groups to find the columns you need.
The filter lists the following options:
 - **Non Value Columns** - contain information such as dates, times, job or customer number, and names.
 - **Value Columns** - contain numeric information such as prices and amounts which can be summed up.
 - **All Columns**
 - b) Click a column name to select it; you can select several at once.

Note: To undo column selection, just click a column name again to deselect it.
 - c) Click **Ok**.
Maconomy lists all your selected columns in the Column Selection pane and displays them in the Preview pane as well.
 - d) If you need to make changes to the columns you specified, you can use the icons on each column line to move a column to a different location in the report, delete a column, or add additional columns.
 - e) If you want your report to include subtotals for specific columns, select the **Subtotal** check box on the relevant column lines.
 - f) If you want to rename any of your selected columns, just enter a name in the **Column Title** field.
All changes you make are automatically and immediately reflected in the Preview pane as well.

Note: At this point, you can already run the report even without saving your changes.
 - g) Click **Save**.

5. If you want to include only selected rows in your report, you can apply filters on certain columns.
 - a) Go to the Row Selection pane.
 - b) Click **+ Add row**.
The Select Columns dialog displays.
 - c) Again, you can use the filter and/or the search field or expand the column groups to find the column you need.
 - d) Click a column name to select it.
 - e) Click **Ok**.
 - f) On the column line, specify the restrictions you want to apply for that column. Use the fields for selecting operators and specifying filter values to do this.

Note: As long as the restrictions you set are valid, you can already run your report even without saving your changes.

- g) Click **Save**.
 - h) Repeat these steps for each column to which you want to apply a filter.
6. To run your saved report, click **Run**.
Maconomy navigates to the Finished Report tab and displays the report output.

Note: If a report takes too long to run or you want to make some changes and rerun it, just click the **Cancel** action displayed on your screen.

If you already navigated to a different workspace, you can cancel the report by clicking the



My Analyzer Reports icon, going to the Finished Reports tab in the

dropdown, and selecting **Cancel** from the actions dropdown available for that report.


Run a Saved Report

At any given time, you can easily access a saved report and rerun it to view updated results.

To run a saved report:

1. Go the report workspace you want to use.
2. In the search filter at the top of the workspace, select **My Reports**.
3. In the search field, type the name of the saved report you need and select it from the dropdown.
4. Click **Run**.
Maconomy navigates to the Finished Report tab and displays the report output.

Note: If a report takes too long to run or you want to make some changes and rerun it, just click the **Cancel** action displayed on your screen.


If you already navigated to a different workspace, you can cancel the report by clicking the  **My Analyzer Reports** icon, going to the Finished Reports tab in the

dropdown, and selecting **Cancel** from the actions dropdown available for that report.

Edit a Saved Report

You can access any of your saved reports, and edit it as needed.

To edit a saved report:

1. Go the report workspace you want to use.
2. In the search filter at the top of the workspace, select **My Reports**.
3. In the search field, type the name of the saved report you need and select it from the dropdown.
4. To add columns:
 - a) Go to the Column Selection pane.
 - b) Click **+ Add column** or the **+** icon on a specific column line.
The Select Columns dialog displays.
 - c) You can use the filter and/or the search field at the top of the Select Columns dialog to quickly find each column you want to add to your report. Otherwise, expand the column groups to find the columns you need.
 - d) Click a column name to select it; you can select several at once.
 - e) Click **Ok**.
Maconomy displays your updated set of columns in the Column Selection pane and displays them in the Preview pane as well.
5. To delete a column, click the trash can icon on the column line.
6. To change the column sequence, click the  icon on a column line and drag the column to its new position.
Enter the result of your step here (optional).
7. If you want your report to include subtotals for specific columns, select the **Subtotal** check box on the relevant column lines.
8. If you want to rename any of your selected columns, just enter a name in the **Column Title** field.
All changes you make are automatically and immediately reflected in the Preview pane as well.
9. If you want to include only selected rows in your report, you can apply filters on certain columns.
 - a) Go to the Row Selection pane.
 - b) Click **+ Add row**.

The Select Columns dialog displays.

- c) Again, you can use the filter and/or the search field or expand the column groups to find the column you need.
 - d) Click a column name to select it.
 - e) Click **Ok**.
 - f) On the column line, specify the restrictions you want to apply for that column. Use the fields for selecting operators and specifying filter values to do this.
 - g) Click **Save**.
 - h) Repeat these steps for each column to which you want to apply a filter.
10. Click **Save**.

Export a Report Output

After running a report, you can download the output in spreadsheet form.

To export your report output:

1. Go to the Finished Report tab.
2. Click the  **Export to Excel** icon.

The Export dialog displays.


3. In the **File format** field, select a format from the dropdown list.
4. In the **Filename** field, specify a filename for the exported spreadsheet. You can opt for the default filename or specify one of your own.
5. Click **Ok**.
Maconomy exports the report output, and immediately downloads the resulting spreadsheet to your local drive.

View a Finished Report

At any given time, you can access old report outputs to view them or to export them to a spreadsheet. You can open a report output using either of two ways.

Option 1

To view a report output using the notification icon:

1. Click the  **My Analyzer Reports icon » Finished Reports tab**.
2. Select a report output from the dropdown that displays.
Maconomy opens the relevant report workspace and displays the report output.

Option 2

To view a report output using the search filter and field:

1. Go to the relevant report workspace.
2. In the search filter at the top of the workspace, select **Finished Reports**.
3. In the search field, type the name of the finished report you need and select it from the dropdown.
Maconomy navigates to the Finished Report tab of the workspace and displays the report output.

General Ledger

Use up to 35 words to describe this conceptual topic. Write complete sentences.

This is the start of your concept.

G/L Analyzers Submenu

The Maconomy web client supports the Analyzer report functionality. The application includes a General Ledger report template that is available via a dedicated workspace.

This report workspace is found under the G/L Analyzers submenu.

G/L Analyzers Concepts

Use the G/L Analyzer report workspace to make ad hoc queries to the database and view the query results in table form.

Specifically, you can:

- Customize and run a report.
- Run saved reports.
- Edit saved reports.
- Export your report output to a spreadsheet.
- View finished reports, immediately after the report run or at any time after the fact.

G/L Analyzer Workspaces

G/L Entries Analyzer Workspace

Maconomy users such as finance and accounting managers can use this report template workspace to generate customized reports that capture very specific information from or related to the general ledgers and entries to which they have access.

For each report template workspace, you can create and save as many customized reports as you need and access these saved reports afterwards using the search filter and field at the top of the workspace.

Column Groups

The G/L Entries report allows users to add columns from the following groups:

- Account
 - Under this group are the following column subgroups:
 - Account Information
 - Derived Dimensions

- Local Account
- Entry Information
- Entry
- Company
- Dimensions
- Control Account
 - Under this group are the following column subgroups:
 - Customer
 - A/R Entry
 - Vendor
 - A/P Entry
 - Job Dimensions
 - Employee
 - Item
 - Asset
- Tax
- Posting
 - Under this group is the following column subgroup:
 - Journal Information
- Import Information
- Intercompany Posting
- Export Information

Analyzer Report Fields

This section describes the fields and actions on a web Analyzer workspace.

Header Fields

Field	Description
Report title	Enter a title for the report you are customizing. You can also edit the title of an existing custom saved or finished report.

Header Actions

Button	Description
+ New Report	Click this action to create a customized report.
Run	Click this action to run the current customized report.

Button	Description
Save	Click this action to save your latest changes to your customized report.
Revert	Click this action to undo your latest edits to your customized report. Maconomy reverts to the last saved version.
Other Actions	<p>In a web Analyzer workspace, this dropdown list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Delete - Select this action to delete the current customized report. ▪ Import - Select this action to import another user's customized report to your application. ▪ Export - Select this action to export the current customized report and download it to your local storage. You can share this downloaded report layout file with other users, so they can import it into their application and run it themselves.

Column and Row Selection Tab

This section describes the fields and actions on the Column and Row Selection tab of a web Analyzer workspace.

Column Selection Pane


Use this pane to begin building your report or query. Select the columns you want to include in your customized report.



Pane Actions

Button	Description
+ Add column	Click this action to open the Select Columns dialog, where you can start adding columns to your customized report.

Pane Fields

Once you add columns to your report, the following fields and icons display on the pane.

Field	Description
	If you want to move the current column to a different location in the report, click this icon then drag and drop the column line to its new location.
Column Name	This field displays the name of the current column.
Subtotal	Select this check box if you want your customized report to include subtotals for the current column.

Field	Description
	<div> Note: After you add a value column to the report, this check box is grayed out for all non-value columns that come after the value column. </div>
Column Title	<p>If you want to rename the current column, enter your preferred name in this field.</p> <p>Maconomy automatically updates the column name in the Preview pane.</p>
	Click this icon to delete the current column from your customized report.
	Click this icon to add a new column after the current column line.

Row Selection Pane




Use this pane to specify criteria for selecting the records to display in your report output.




Pane Actions

Button	Description
+ Add row	Click this action to open the Select Columns dialog, where you can start adding the columns to which you want to apply selection criteria or filters.

Pane Fields

Once you select columns to filter for your report, the following fields display on the pane.

Field	Description
	If you want to move the current column and its restrictions to a different location in the pane, click this icon and drag and drop the column line to its new location.
	Click this icon to delete the current column and its restrictions.
	Click this icon to add a new column after the current column line.
Column Name	This field displays the name of the current column.

Field	Description
	If you want to move the current restriction to a different location under the relevant column, click this icon and drag and drop the restriction line to its new location.
Restrictions	<p>In the first field, select an operator from the dropdown list. The dropdown includes some or all of the following options:</p> <ul style="list-style-type: none"> ▪ = Equal to ▪ x...y Between ▪ < Less than ▪ > Greater than ▪ ≤ Less than or equal to ▪ ≥ Greater than or equal to ▪ ≠ Not equal to ▪ ∅ Is empty ▪ ¬∅ Is not empty <p>In the second field, type or select the value you want to use to filter values for the current column.</p>
	Click this icon to delete the current restriction line.
	If you want to specify more than one restriction for the current column, click this icon to add a new restriction after the current restriction line.

Preview Pane

Use this pane to preview the report you are customizing. If you are viewing a saved report or a finished report output, this pane also displays a preview for that. Switch to the full screen view



using the




Full screen preview icon on the top right corner of the pane.

Finished Report Tab

This section describes the fields and actions on the Finished Report tab of a web Analyzer workspace.

After you run a report, use this tab to view the output.

Tab Actions

Button	Description
	Click this icon to export the report output to a spreadsheet. Maconomy exports the report output, and immediately downloads the resulting spreadsheet to your local drive.
 	Click this icon to maximize the report output view to full screen. Click this icon to restore the default display size of the report output.

GA_GL Entries Analyzer Procedures

Use up to 35 words to describe this conceptual topic. Write complete sentences.

This is the start of your concept.

Customize and Run a Report

You can build your query by adding any of the columns available for your selected report template workspace, filter rows if you want to view even more specific information (and minimize performance issues), and preview the report before running it.

To customize and run a report:

- Go to the workspace for the report template you want to use.
- In the **Report title** field in the header, enter a name for your report.
- Under the Column and Row Selection tab, go to the Column Selection pane and click **+** **Add column**.
Maconomy opens the Select Columns dialog.
- To customize the columns in your report:
 - You can use the filter and/or the search field at the top of the Select Columns dialog to quickly find each column you want to add to your report. Otherwise, expand the column groups to find the columns you need.
The filter lists the following options:
 - Non Value Columns** - contain information such as dates, times, job or customer number, and names.
 - Value Columns** - contain numeric information such as prices and amounts which can be summed up.
 - All Columns**
 - Click a column name to select it; you can select several at once.

Note: To undo column selection, just click a column name again to deselect it.

- c) Click **Ok**.
Maconomy lists all your selected columns in the Column Selection pane and displays them in the Preview pane as well.
- d) If you need to make changes to the columns you specified, you can use the icons on each column line to move a column to a different location in the report, delete a column, or add additional columns.
- e) If you want your report to include subtotals for specific columns, select the **Subtotal** check box on the relevant column lines.
- f) If you want to rename any of your selected columns, just enter a name in the **Column Title** field.
All changes you make are automatically and immediately reflected in the Preview pane as well.


Note: At this point, you can already run the report even without saving your changes.

- g) Click **Save**.
5. If you want to include only selected rows in your report, you can apply filters on certain columns.
 - a) Go to the Row Selection pane.
 - b) Click **+ Add row**.
The Select Columns dialog displays.
 - c) Again, you can use the filter and/or the search field or expand the column groups to find the column you need.
 - d) Click a column name to select it.
 - e) Click **Ok**.
 - f) On the column line, specify the restrictions you want to apply for that column. Use the fields for selecting operators and specifying filter values to do this.

Note: As long as the restrictions you set are valid, you can already run your report even without saving your changes.

- g) Click **Save**.
- h) Repeat these steps for each column to which you want to apply a filter.
6. To run your saved report, click **Run**.
Maconomy navigates to the Finished Report tab and displays the report output.

Note: If a report takes too long to run or you want to make some changes and rerun it, just click the **Cancel** action displayed on your screen.

If you already navigated to a different workspace, you can cancel the report by clicking the  **My Analyzer Reports** icon, going to the Finished Reports tab in the dropdown, and selecting **Cancel** from the actions dropdown available for that report.


Run a Saved Report

At any given time, you can easily access a saved report and rerun it to view updated results.

To run a saved report:

1. Go the report workspace you want to use.
2. In the search filter at the top of the workspace, select **My Reports**.
3. In the search field, type the name of the saved report you need and select it from the dropdown.
4. Click **Run**.
Maconomy navigates to the Finished Report tab and displays the report output.

Note: If a report takes too long to run or you want to make some changes and rerun it, just click the **Cancel** action displayed on your screen.


If you already navigated to a different workspace, you can cancel the report by clicking the  **My Analyzer Reports** icon, going to the Finished Reports tab in the dropdown, and selecting **Cancel** from the actions dropdown available for that report.

Edit a Saved Report

You can access any of your saved reports, and edit it as needed.

To edit a saved report:


1. Go the report workspace you want to use.
2. In the search filter at the top of the workspace, select **My Reports**.
3. In the search field, type the name of the saved report you need and select it from the dropdown.
4. To add columns:
 - a) Go to the Column Selection pane.
 - b) Click **+ Add column** or the **+** icon on a specific column line.
The Select Columns dialog displays.
 - c) You can use the filter and/or the search field at the top of the Select Columns dialog to quickly find each column you want to add to your report. Otherwise, expand the column groups to find the columns you need.

- d) Click a column name to select it; you can select several at once.
- e) Click **Ok**.
Maconomy displays your updated set of columns in the Column Selection pane and displays them in the Preview pane as well.
5. To delete a column, click the trash can icon on the column line.
6. To change the column sequence, click the  icon on a column line and drag the column to its new position.
Enter the result of your step here (optional).
7. If you want your report to include subtotals for specific columns, select the **Subtotal** check box on the relevant column lines.
8. If you want to rename any of your selected columns, just enter a name in the **Column Title** field.
All changes you make are automatically and immediately reflected in the Preview pane as well.
9. If you want to include only selected rows in your report, you can apply filters on certain columns.
 - a) Go to the Row Selection pane.
 - b) Click **+ Add row**.
The Select Columns dialog displays.
 - c) Again, you can use the filter and/or the search field or expand the column groups to find the column you need.
 - d) Click a column name to select it.
 - e) Click **Ok**.
 - f) On the column line, specify the restrictions you want to apply for that column. Use the fields for selecting operators and specifying filter values to do this.
 - g) Click **Save**.
 - h) Repeat these steps for each column to which you want to apply a filter.
10. Click **Save**.

Export a Report Output

After running a report, you can download the output in spreadsheet form.

To export your report output:

1. Go to the Finished Report tab.
2. Click the  **Export to Excel** icon.
The Export dialog displays.
3. In the **File format** field, select a format from the dropdown list.


4. In the **Filename** field, specify a filename for the exported spreadsheet. You can opt for the default filename or specify one of your own.
5. Click **Ok**.
Maconomy exports the report output, and immediately downloads the resulting spreadsheet to your local drive.

View a Finished Report

At any given time, you can access old report outputs to view them or to export them to a spreadsheet. You can open a report output using either of two ways.

Option 1

To view a report output using the notification icon:

1. Click the  **My Analyzer Reports icon » Finished Reports tab**.
2. Select a report output from the dropdown that displays.
Maconomy opens the relevant report workspace and displays the report output.

Option 2

To view a report output using the search filter and field:

1. Go to the relevant report workspace.
2. In the search filter at the top of the workspace, select **Finished Reports**.
3. In the search field, type the name of the finished report you need and select it from the dropdown.
Maconomy navigates to the Finished Report tab of the workspace and displays the report output.

Accounts Receivable

This section covers conceptual information, procedures, and field descriptions for all customer and customer-related workspaces.

Customers

Account managers and the like can now use this workspace to create and maintain customer information.

Customer Concepts

Specifically, the Customers workspace allows you to do the following:

- Create records for new global customers and sub-customers.
- Maintain existing customers' information.
- Look up customer-specific information such as entries, jobs, subscription orders, and invoices.
- View/upload documents for a specific customer.
- Review and approve customer records.

Note: Maconomy CRM is not part of the Customers workspace. Instead, the Deltak CRM integration is supported. Some information is shown/hidden based on the setup (for example, the Customer Hierarchy, Reminder Letters, and Interest Charge Notices tabs are only visible if the Maconomy system has been configured to use these).

The Customers workspace does not support manual creation and/or maintenance of company customers as this is considered a back office function.

In addition, you can use the Customer Reports workspace to run BPM reports across multiple customers. These reports open in a separate browser tab.

Customer Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notifications are included:




- **Submit Customer** – Appears for the user to indicate the pending submission of customer information. This notification points to the Customers workspace.
- **Rejected Customer** – Appears for the user to indicate that submitted customer information has been rejected. This notification points to the Customers workspace.

Customers Fields

This section describes the fields and actions on the Customers workspace.

Card Part Fields

Card Part Actions

Button	Description
+ New Customer	
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.
Approve	Click this action button to approve the current record. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.
Reject...	Click this action button to reject the current record. Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.
Other Actions	In the Customers tab, this drop-down list includes the following actions:

Button	Description
	<ul style="list-style-type: none"> ▪ Attach Documents ▪ Undo Approval/Reject

Information Tab

This section describes the fields and actions on the Information tab of the Customers workspace.

Copy to come.






Customer Hierarchy Tab

This section describes the fields and actions on the Customer Hierarchy tab of the Customers workspace.

Tab Fields

Subcustomers Table Fields

Subcustomers Table Actions






Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Jobs Tab

This section describes the fields and actions on the Jobs tab of the Customers workspace.

Tab Fields

Tab Actions



Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.




Subscription Orders Tab

This section describes the fields and actions on the Subscription Orders tab of the Customers workspace.

Tab Fields

Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.






Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Invoices Tab

This section describes the fields and actions on the Invoices tab of the Customers workspace.

Tab Fields

Tab Actions






Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Reminder Letters Tab

This section describes the fields and actions on the Reminder Letters tab of the Customers workspace.

Tab Fields

Tab Actions





Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.


Interest Charge Notices Tab

This section describes the fields and actions on the Interest Charge Notices tab of the Customers workspace.

Tab Fields

Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.

Button	Description
	Click this icon to open the Customize Columns window.




Documents Tab



This section describes the fields and actions on the Documents tab of the Customers workspace.

Tab Fields

Field	Description
Document	This field displays the file name of the document attached to the customer. The field is automatically filled in by Maconomy and cannot be changed manually. Click on the file name to download the document.
Type	This field displays the file type/format of the document attached to the customer (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the customer.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the customer.
Changed By	This field displays the name of the last user to upload the file/document to the current customer.
Remark	Enter any additional remarks in this field.

Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.






Button	Description
	
	Click this icon to open the Customize Columns window.

Open Entry Statement Tab

This section describes the fields and actions on the Open Entry Statement tab of the Customers workspace.

Tab Fields

Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Customers Procedures

This section describes the steps you need to follow to work with customer information.

Create a Customer

Use these steps to add new customer information.

To create a customer:

1. Under the Accounts Receivable menu section, go to the Customers workspace.
2. Click **+ New Customer**.
The Create Customer wizard displays.
3. Enter the name of the customer. This is a required field.
4. Fill out the other fields as needed.
5. Click **Create**.
Maconomy saves your changes, and automatically displays the information for the customer you just created.

Edit Customer Information

Use these steps to edit selected fields in the Information and Customer Hierarchy tabs of the Customers workspace.

To edit customer information:

1. Under the Accounts Receivable menu section, go to the Customers workspace.
2. Go to either the Information tab or the Customer Hierarchy tab.
3. Edit the fields as needed.
4. Click **Save** or press ENTER.
Maconomy saves your changes, and refreshes the browser window.

Submit Customer Information

Use these steps to submit a new or updated customer record.

To submit a customer record:

1. Under the Accounts Receivable menu section, go to the Customers workspace.
2. Open the customer record you just created or edited.
3. Click **Submit**.

Approve or Reject Customer Information

Use these steps to review and approve or reject new/updated customer information submitted for your approval. You can also approve (and reject) customers in the Approval Center workspace.

To approve or reject a customer record:

1. Under the Accounts Receivable menu section, go to the Customers workspace.

2. Use the search filter and/or the **Search** field to select a customer record for your approval.
3. To approve the customer record:
 - a) Click **Approve**.
4. To reject the customer record:
 - a) Click **Reject....**
Maconomy displays the Reject Line wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Attach Documents

Use these steps to associate certain documents with a specific customer.

To attach a document:

1. Under the Accounts Receivable menu section, go to the Customers workspace.
 2. Use the search filter and/or the **Search** field to select a customer.
 3. From the **Other Actions** drop-down list, select **Attach Documents**.
 4. In the dialog that opens, click **Select files** to open your file explorer.
 5. Select the file/s that you want to upload.
 6. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.
- Note:** Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.
7. Click **Ok**.
Maconomy saves your changes, and lists the file/s you attached in the Documents tab.

View Customer Documents

Use these steps to view a document associated with a specific customer.

To view a document:

1. Under the Accounts Receivable menu section, go to the Customers workspace.
2. Use the search filter and/or the **Search** field to select a customer.
3. In the Documents tab, select a line.
4. Click **Row Tools » View Document**.
The file is downloaded to your computer/device.

Add a Customer to a Hierarchy

Use these steps to make a customer the sub-customer of another.

To add a customer to a hierarchy:

1. Under the Accounts Receivable menu section, go to the Customers workspace.
2. Use the search filter and/or the **Search** field to select a customer.
3. In the Customer Hierarchy tab of the workspace, click the **Insert in Hierarchy** action. The Insert in Hierarchy wizard displays.
4. In the **Customer** field, select a parent customer from the drop-down list.
5. Click **Insert**.
Maconomy saves your changes, and updates relevant fields under the Hierarchy and Parent Customer islands.

Remove a Customer from a Hierarchy

Use these steps to remove a customer from a hierarchy.

To remove a customer from a hierarchy:

1. Under the Accounts Receivable menu section, go to the Customers workspace.
2. Use the search filter and/or the **Search** field to select a customer.
3. In the Customer Hierarchy tab of the workspace, click the **Remove from Hierarchy** action.
4. In the Remove From Hierarchy confirmation dialog that displays, click **Remove**.
Maconomy saves your changes, and updates relevant fields under the Hierarchy and Parent Customer islands.

Add a Sub-Customer

Use these steps to make a customer the parent of another.

To add a sub-customer:

1. Under the Accounts Receivable menu section, go to the Customers workspace.
2. Use the search filter and/or the **Search** field to select a customer.
3. In the Customer Hierarchy tab of the workspace, click the **Add Sub-Customer** action. The Create Sub-Customer wizard displays.
4. Under the Customer island, enter the name of the sub-customer. This is a required field.
5. Fill out all the other fields as needed.
6. Click **Create**.
Maconomy saves your changes. When you refresh the browser page, you will see the sub-customer listed in the Sub-Customers table.

Customer Invoicing

The Customer Invoicing workspace allows you to combine several jobs on a single invoice for a customer.

Customer Invoicing Concepts

You can:




- Carry out invoice selection at any level: at the top level of a blanket invoice, at the job level, at the level of invoice selection lines, and/or at the level of specific job entries.
- Edit invoice drafts before printing.
- View and print historical invoices for a specific customer.

Customer Invoicing Fields

This section describes the fields and actions on the Customer Invoicing workspace.

Copy to come.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record.
Revert	Click this action button to undo unsaved changes made to the current record, or to any of its lines.






Invoice Selection Tab

This section describes the fields and actions on the Invoice Selection tab of the Customer Invoicing workspace.

Tab Fields

Tab Actions

Jobs Table**Table Fields****Table Actions**

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Invoice Editing Tab

This section describes the fields and actions on the Invoice Editing tab of the Customer Invoicing workspace.

Tab Fields

Field	Description

Tab Actions

Button	Description
Submit Draft	
Approve Draft	
Close Editing	
Reopen Editing	
Print Draft	
Other Actions	In the Invoice Editing tab, this drop-down list includes the following actions:

Button	Description
	<ul style="list-style-type: none"> Show Summary Show Detailed Specification Restore Editing, Detailed Specification Remove Other Drafts Attach Document Restore Editing, Summary Copy Editing from Invoice... Copy Editing from Draft...


Documents Sub-Tab






This section describes the fields and actions on the Documents sub-tab of the Invoice Editing tab in the Customer Invoicing workspace.

Sub-Tab Fields

Field	Description
Document	This field displays the file name of the document attached to the draft invoice. The field is automatically filled in by Maconomy and cannot be changed manually. Click on the file name to download the document.
Type	This field displays the file type/format of the document attached to the draft invoice (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the draft invoice.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the draft invoice.
Changed By	This field displays the name of the last user to upload the file/document to the current draft invoice.
Remark	Enter any additional remarks in this field.

Sub-Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record.

Button	Description
	<p>For lines in the Documents sub-tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Update Document ▪ Delete Document ▪ View Document
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Invoice History Tab






This section describes the fields and actions on the Invoice History tab of the Customer Invoicing workspace.

Tab Fields

Field	Description
Invoice No.	
Debit/Credit	
Invoice Date	
Bill to Customer	
Amount Incl. Tax	

Field	Description
Billing Price Up/Down	
Due Date	
Payment Status	<p>This field displays the following payment statuses of invoices, pre-invoices, and credit memos:</p> <ul style="list-style-type: none"> ▪ Due - Copy to come. ▪ Not Due - Copy to come. ▪ N/A - Copy to come. ▪ Paid - Copy to come. ▪ Reconciled - Copy to come. ▪ Not Reconciled - Copy to come. ▪ Partially Reconciled - The amount due for the job invoice is partially paid. The status is color-coded yellow if the invoice has a remaining balance and red if there are payments made but the balance is due. This is in the currency of your invoice.
Remainder	<p>This field displays the remaining balance of your invoice, pre-invoice, or credit memo, in the currency of your invoice.</p>

Tab Actions

Button	Description
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Customer Invoicing Procedures

This section describes the steps you need to follow to work with customer invoicing.

Attach Documents to a Draft Invoice

Use these steps to attach documents to a draft invoice.

To attach documents to a draft invoice:

1. Under the Accounts Receivable menu section, go to **Customer invoicing workspace » Invoice Editing tab**.
2. Select a customer from the filter list.
3. From the **Other Actions** drop-down list, select **Attach Document**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the file/s that you want to upload.
6. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy saves your changes, and lists the new attachment in the Documents sub-tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents sub-tab. Click **Save**, or press ENTER to save the information.

View a Document

You can view any document listed in the Documents sub-tab.

To view a document:

1. Under the Accounts Receivable menu section, go to **Customer Invoicing » Invoice Editing**.
2. Select a customer from the filter list.
3. In the Documents sub-tab, select a line.
4. Click **Row Tools » View Document** on the line.
The file is downloaded to your computer/device.

Start a Conversation

You can use the conversations functionality to correspond about a specific record or transaction with other employees in your company.

To start a conversation:

1. Go to the relevant workspace.
2. Select a record or transaction from the filter list.
The Messages pane is found on the right-hand side of the workspace.
3. In the input area of the Messages pane, type your message. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Reply to a Conversation

Use the speech bubble icon in the top right corner of the menu to quickly view and respond to conversations.

To reply to a conversation:

1. To expand the Message Center, click the speech bubble icon.
2. From the dropdown list, expand a record or transaction and click on the message to which you want to reply.
Maconomy navigates to the relevant workspace, and opens the Messages pane for the record or transaction you selected.
3. In the input area, type your reply. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Batch Invoicing Submenu

Use up to 35 words to describe this conceptual topic. Write complete sentences.

This is the start of your concept.

Draft Invoice Creation

The Draft Invoice Creation workspace enables you to create draft invoices for a batch of jobs.

Draft Invoice Creation Concepts

Specifically, you can:

- Use selection criteria to create invoices for specific jobs

- Delimit entries by date
- Set a preferred invoice date
- Transfer an invoicing selection
- Calculate surcharges

In the table part, you can also specify individual jobs to exclude from draft creation, as well as review relevant details for each job. You can also individually print draft invoices by using the **Print Draft** action on each line.

You can process batch invoices either manually or through scheduled background tasks. If errors occur during batch invoicing, the system automatically skips the job causing the error and moves to the next one. The details of each error is registered as a notification for the user to review after the process is done.

The Draft Invoice Creation workspace is available by default to users with the requisite permissions.

Draft Invoice Creation Fields

This section describes the fields and actions on the Draft Invoice Creation workspace.

Selection Criteria Panel

Field	Description
Jobs with Open Billing Price Only	Select this checkbox to only display jobs with open billing price, that is, job entries that have not yet been invoiced.
Jobs with Amount for Invoice Only	Select this checkbox to only display jobs that contain entries with amounts for Invoicing on Account.
Jobs with Invoicing Plan Lines for Invoice on Account Only	Select this checkbox to only display jobs with an amount transferred from the invoicing plan.
Jobs with Failed Action Only	Select this checkbox to only display jobs with a failed action.
Job Number	Select the appropriate job number range to display the draft invoices for those specific jobs.
Job Group	To show the draft invoices for jobs with a specific job group, select an option from the drop-down list.
Customer Group	To show the draft invoices for jobs with a specific customer group, select an option from the drop-down list.
Project Manager	To show the draft invoices for jobs with a specific project manager assigned to them, select an option from the drop-down list.

Field	Description
Company	Select the appropriate company number range to display the draft invoices for those specific companies.
Customer	Select the appropriate customer range to display the draft invoices for those specific customers.
Bill to Customer	Select the bill to customer range to display the draft invoices for those specific bill to customers.

Card Part Actions







Button	Description
	Click this icon to refresh data in the current workspace.
Save	Click this action button to save changes to the current record.
Revert	Click this action button to undo unsaved changes made to the current record, or to any of its lines.
Delimit...	Click this action button to create an invoice selection for all open entries on the jobs displayed based on your specified selection criteria.
Transfer Invoicing Plans...	Click this action button to transfer any due lines in the invoicing plans of the specified jobs to the current invoice selection.
Create Drafts...	Click this action button to create draft invoices for all the specified jobs based on your selection criteria.
Print Drafts	Click this action button to print all draft invoices for the specified jobs.
Other Actions	<p>In the Draft Invoice Creation workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Remove Drafts - Click this action button to delete any unwanted draft invoices. ▪ Undo Transfer Invoicing Plans - Click this action button to undo any transfers from the invoicing plan. ▪ Transfer Task Groups - Click this action button to update the task group information of the selected jobs to reflect the current work breakdown structure of the job budget. ▪ Apply Invoice Proposals - Click this action button to apply all values proposed by the project manager and/or the employee on the selected job entries. ▪ Calculate Invoice Surcharge - Click this action button to calculate surcharge based on the job surcharge rule specified on the jobs separately.

Table Fields

Field	Description
Show Lines	Toggle on/off to show/hide the lines matching the values specified in your selection criteria.
Show Totals	Toggle on/off to show/hide the total number of jobs applicable for draft invoice creation.
Create Draft	Select this checkbox to create a draft invoice for the current line. This checkbox is automatically selected after using the Delimit... action.
Drafts Exist	This field specifies whether a draft invoice exists for the current line.
Job Number	This field displays the job number.
Job Name	This field displays the job name.
Customer Number	This field displays the number of the customer associated with the job.
Customer Name	This field displays the name of the customer associated with the job.
Bill to Customer Number	This field displays the number of the bill to customer associated with the job.
Preferred Invoice Date	This field displays the invoice date specified when you created the draft invoice.
Amount for Invoicing	This field displays the amount sent for invoicing.
Amount for Invoice on Account	This field displays the amount sent for invoicing on account.
Invoiced Previously	This field displays the billing price total that was previously invoiced to the customer.
Last Invoice Date	This field displays the date of the last invoice made for the job.
Failed Action	This field specifies whether the selected action has failed.
Failed Action, Message	This field displays why the selected action failed.
Print Draft	Click this icon to print a draft invoice for the job on the current line.

Table Actions

Button	Description
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Draft Invoice Creation Procedures

This section describes all the steps you need to work to create draft invoices.

Create Draft Invoices

You can create draft invoices for multiple jobs in this workspace.

To create draft invoices:

1. Under the Batch Invoicing submenu, go to the Invoice Draft Creation workspace.
2. In the Selection Criteria panel, use the available criteria to display the jobs for which the draft invoices should be created.
3. Click **Apply**.
4. Toggle on **Show Lines** to display the results.
5. Click **Delimit...**
6. In the wizard that opens, specify information as needed.
7. Click **Delimit**.
Note: A warning message displays if draft invoices already exist on one of more jobs in the table. The system skips these jobs during draft invoice creation.
The **Create Draft** checkbox is selected on each applicable line in the table.
8. Click **Create Drafts**.
9. In the dialog that opens, choose a preferred invoice date to apply to all draft invoices.

10. Click **Create**.

The **Drafts Exist** checkbox is automatically selected on each line after batch draft invoice creation is done.

Note: If errors occur on jobs during invoice draft creation, these are automatically skipped by Maconomy. You can view which action failed and the cause of failure on the line in the table.

Draft Invoice Status

The Draft Invoice Status workspace provides an at-a-glance view of draft invoices in various stages. This helps you monitor all invoices and ensure that they progress to the next stage of the invoicing process in a timely manner.

Draft Invoice Status Concepts

Specifically, you can do the following:

- Utilize selection criteria to view specific draft invoices
- Easily view the status and next approver for a draft invoice
- Manually select individual draft invoices or process draft invoices in batches for submission, approval, or printing
- Print a draft invoice individually for each line in the table part using the **Print Draft** action

For users with the requisite permissions, this workspace is available by default.

Draft Invoice Status Fields


This section describes the fields and actions on the Draft Invoice Status workspace.

Selection Criteria Panel

Field	Description
Draft Status	<p>To show the draft invoices with a specific status, select an option from the drop-down list:</p> <ul style="list-style-type: none"> ■ Not Approved ■ Not Submitted ■ Awaiting Approval ■ Approved <p>This is a required field. By default, the selected status is ot Approved.</p>
Job Number	Select the appropriate job number range to display the draft invoices for those specific jobs.
Job Group	To show the draft invoices for jobs with a specific job group, select an option from the drop-down list.

Field	Description
Project Manager	To show the draft invoices for jobs with a specific project manager assigned to them, select an option from the drop-down list.
Company	Select the appropriate company number range to display the draft invoices for those specific companies.
Customer	Select the appropriate customer range to display the draft invoices for those specific customers.
Bill to Customer	Select the bill to customer range to display the draft invoices for those specific bill to customers.

Card Part Actions


Button	Description
	Click this icon to refresh data in the current workspace.
Save	Click this action button to save changes to the current record.
Revert	Click this action button to undo unsaved changes made to the current record, or to any of its lines.
Print Drafts	This drop-down list includes the following actions: <ul style="list-style-type: none"> ▪ Mark all for Draft Printing ▪ Unmark All for Draft Printing ▪ Print Drafts
Submit Drafts	This drop-down list includes the following actions: <ul style="list-style-type: none"> ▪ Mark all for Submission ▪ Unmark All for Submission ▪ Submit Drafts
Approve Drafts	This drop-down list includes the following actions: <ul style="list-style-type: none"> ▪ Mark all for Approval ▪ Unmark All for Approval ▪ Approve Drafts





Drafts Table Fields

Field	Description
Job Number	This field displays the job number.

Field	Description
Job Name	This field displays the job name.
Project Manager	This field displays the name of the project manager for the job.
Bill to Customer Number	This field displays the number of the bill to customer associated with the job.
Preferred Invoice Date	This field displays the invoice date specified when you created the draft invoice.
Type	This field displays the invoice type.
Amount for Invoicing	This field displays the amount sent for invoicing.
Up/Down	This field displays the amount by which the billing price has been written up/down for the job.
Status	This field displays the current approval status of the draft invoice.
Next Approver	This field displays the name of the next approver of the draft invoice.
Submit Draft	<p>Select this checkbox to include the line in the batch submission of draft invoices.</p> <div> <p>Note: You can only select this checkbox on draft invoices with the Open status. An error displays if you attempt to select this on draft invoices that have already been submitted, partially approved, or approved.</p> </div>
Print Draft	Select this checkbox to include the line in the batch printing of draft invoices.
Approve Draft	Select this checkbox to include the line in the batch approval of draft invoices.
Print Draft	Click this icon to print a draft invoice for the job on the current line.

Table Actions

Button	Description
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.

Button	Description
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Job Invoicing

The Job Invoicing workspace displays all fully approved draft invoices that are ready for printing.

Job Invoicing Concepts

This workspace provides the following:

- The ability to specify which draft invoices to include based on the preferred invoice date
- The ability to restrict the displayed invoice type in the workspace to 0-invoices or regular invoices only
- The ability to transfer the invoice date to the selected draft invoices
- The ability to print draft invoices and final invoices

For users with the requisite permissions, this workspace is available by default.

Job Invoicing Fields

This section describes the fields and actions on the Job Invoicing workspace.

Selection Criteria Panel


Field	Description
Job Number	Select the appropriate job number range to display the invoices for the specified draft invoices.
Job Group	To show the invoices for jobs with a specific job group, select an option from the drop-down list.
Customer Group	To show the invoices for jobs with a specific customer group, select an option from the drop-down list.

Field	Description
Project Manager	To show the invoices for jobs with a specific project manager assigned to them, select an option from the drop-down list.
Company	Select the appropriate company number range to display the draft invoices for those specific companies.
Customer	Select the appropriate customer range to display the draft invoices for those specific customers.
Bill to Customer	Select the bill to customer range to display the draft invoices for those specific bill to customers.
Invoice Date	Select the invoice date range to choose the invoices to display. This is based on the preferred invoice date indicated on the draft invoice.
Zero/Non-Zero	Specify whether you wish to view regular invoices only or zero-invoices only. If you leave this blank, the workspace displays both invoice types.

Card Part Fields

Field	Description
Show Lines	Toggle on/off to show/hide the lines matching the values specified in your selection criteria.
Layout	This field displays the layout used for the invoices.
Number of Drafts	This field displays the total number of draft invoices on the job.
Amount for Invoicing	This field displays the total amount for invoicing.

Card Part Actions


Button	Description
	Click this icon to refresh data in the current workspace.
Save	Click this action button to save changes to the current record.
Revert	Click this action button to undo unsaved changes made to the current record, or to any of its lines.
Transfer Invoice Date...	Click this action button to transfer the preferred invoice date to the draft invoices in the table.
Print Drafts	Click this action button to print all draft invoices for the specified draft invoices.
Print Invoices	Click this action button to print all invoices for the specified jobs.





Button	Description
Mark all for Invoicing	Click this action button to select all displayed lines for invoicing.
Unmark all for Invoicing	Click this action button to deselect all displayed lines for invoicing.

Drafts Table Fields

Field	Description
View Details	Click this icon to open the draft invoice. This will open the draft invoice in the Draft Invoices workspace in a new browser tab.
Invoice	Select this checkbox to include the line in the batch printing of draft invoices or invoices.
Job Number	This field displays the job number.
Job Name	This field displays the job name.
Customer Number	This field displays the number of the customer associated with the job.
Customer Name	This field displays the name of the customer associated with the job.
Bill to Customer	This field displays the number of the bill to customer associated with the job.
Bill to Customer Name	This field displays the name of the bill to customer associated with the job.
Invoice Date	This field displays the date of the invoice.
Billing Price, Invoice Currency	This field displays the amount invoiced on the job in the invoice currency.
Billing Price Up/Down, Currency	This field displays the amount written up/down on the invoice in the job currency.
Print Draft	Click this icon to print a draft invoice for the current line.

Table Actions

Button	Description
	Click to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.

Button	Description
	Click to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click to maximize the table view. Click to restore the default display size of the table.
	Click to open the Customize Columns window.

Collections

Copy to come.

Collections Concepts




Copy to come.

Collections Fields

This section describes the fields and actions on the Collections workspace.

Copy to come.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record.
Revert	Click this action button to undo unsaved changes made to the current record, or to any of its lines.

Button	Description
Create Collection Event Flow	

Overview Tab

This section describes the fields and actions on the Overview tab of the Collections workspace.

Tab Fields

Field	Description
Debit/Credit	
Invoice Type	
Invoice Date	
Due Date	
Payment Status	<p>This field displays the following payment statuses of invoices, pre-invoices, and credit memos:</p> <ul style="list-style-type: none"> ■ Due - ■ Not Due - ■ N/A - ■ Paid - ■ Reconciled - ■ Not Reconciled - ■ Partially Reconciled - The amount due for the job invoice is partially paid. The status is color-coded yellow if the invoice has a remaining balance and red if there are payments made but the balance is due. This is in the currency of your invoice.
Remainder	This field displays the remaining balance of your invoice, pre-invoice, or credit memo, in the currency of your invoice.
Total	
Billing Address	
Account Manager	

Details island

Tab Actions






Button	Description
Print Copy	
Create Collection Event Flow	

Specification Sub-Tab

This section describes the fields and actions on the Specification sub-tab of the Collections workspace.

Sub-Tab Fields

Sub-Tab Actions






Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Foundation Sub-Tab

This section describes the fields and actions on the Foundation sub-tab of the Collections workspace.

Sub-Tab Fields

Sub-Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Documents Sub-Tab






This section describes the fields and actions on the Documents sub-tab of the Collections workspace.

Sub-Tab Fields

Field	Description
Document	This field displays the file name of the document attached to the customer invoice. The field is automatically filled in by Maconomy and cannot be changed manually. Click on the file name to download the document.
Type	This field displays the file type/format of the document attached to the customer invoice (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the customer invoice.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the customer invoice.
Changed By	This field displays the name of the last user to upload the file/document to the current customer invoice.

Field	Description
Remark	Enter any additional remarks in this field.

Sub-Tab Actions

Button	Description
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Messages Pane

This section describes the fields and actions on the Messages pane of the Collections workspace. For more information about the functionality, see "Conversations" under the Getting Started section of this online help.

Messages Area

This contains all the messages about the selected customer invoice. If you want to delete the last message you sent, simply click the **Delete** icon to the right of that message. You can delete a message within 15 minutes of sending it.

You can also mark specific messages in the conversation as unread. Hover your pointer at the end of the message line, then click the vertical ellipsis that appears. Click **Mark as unread**.

Input Area

This is available at the bottom of the pane. You can type your message here, then press ENTER or click the paper plane icon to send. Each message has a 255-character limit.

Pane Actions

Action	Description
+ Add Participant	Click this action to add a user to the conversation for the selected customer invoice.
Subscribe/ Unsubscribe	Click this action to subscribe to/unsubscribe from the conversation for the selected customer invoice.
Send	Click the paper plane icon to send your message.

Collections Procedures

This section describes the steps you need to follow to work with customer invoices.

Start a Conversation

You can use the conversations functionality to correspond about a specific record or transaction with other employees in your company.

To start a conversation:

1. Go to the relevant workspace.
2. Select a record or transaction from the filter list.
The Messages pane is found on the right-hand side of the workspace.
3. In the input area of the Messages pane, type your message. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Reply to a Conversation

Use the speech bubble icon in the top right corner of the menu to quickly view and respond to conversations.

To reply to a conversation:

1. To expand the Message Center, click the speech bubble icon.
2. From the dropdown list, expand a record or transaction and click on the message to which you want to reply.
Maconomy navigates to the relevant workspace, and opens the Messages pane for the record or transaction you selected.
3. In the input area, type your reply. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Customer Payments

The Customer Payments workspace allows you to create and post customer payment journals.

Customer Payments Concepts

You can enter several customer payments in the same customer payment journal, and you can edit those entries until you post the journal.

You can add more lines if there are more than one payment. You can have payments on several customers on the same journal. Once all payments have been added, you can post the journal.

Customer Payments Fields




This section describes the fields and actions on the Customer Payments workspace.

Card Part

Field	Description
Customer Payment Journal	This field displays the customer payment journal name and number to which the customer payment is added.
Customer	This field displays the customer name and number.
Created	This field displays the date the customer payment journal was created, and the name of the employee who created it.
Control	Enter a control sum that is the expected total of all entries in the journal. The batch total is calculated as the sum of all of the amounts in the Amount field on the lines in the journal.
Current	This field shows the batch total of the journal. The batch total is the sum of the amounts in the Amount field on all lines in the sub-tab.
Balance	This field shows the difference between the amounts in the Control and Current fields. If you entered an amount in the field Control field, the customer payment journal can only be posted if the value in this field is 0.
Ready for posting	Specify whether the journal should be released for posting.

Card Part Actions

Button	Description
+ New Journal	Click this action to create a customer payment journal.

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action to undo changes made to the current record, or to any of its lines.
Post	Click this action to post the customer payment journal.
Submit	Click this action to submit the customer payment journal.
Other Actions	In the Customer Payments tab, this drop-down list includes the following actions: <ul style="list-style-type: none"> ▪ Reopen ▪ Delete All Journal Lines ▪ Attach Document ▪ View Document

Customer Payment Lines Sub-Tab


This section describes the fields and actions on the Customer Payment Lines sub-tab in the Customer Payments workspace.






Sub-Tab Fields

Field	Description
Entry Date	This field displays the entry date for the current line. It defaults to today's date, but you can change it to the actual date of the payment.
Customer No.	Enter a customer number. This number refers to the bill-to customer. If you enter a customer number in this field and an invoice number in the Reconciled Invoice No. field, the customer and the paying customer must be identical. If you only enter an invoice number in the field Reconciled Invoice No. field, the customer number registered on the invoice in question is automatically transferred to this field.

Field	Description
Name	This field displays the name of the customer specified in the Customer No. field on the selected line.
Description	Enter a short description of the payment. This is a free-text field.
Amount	Enter the paid amount.
Amount, Currency	Enter the currency value of the payment. For example, USD 10,000, enter 10000 in this field.
Charge	Enter a charge amount in currency.
Charge, Currency	Enter the amount of any bank charges associated with this payment. The account associated with the payment mode will be debited the amount of the bank charge. This is an optional field.
Currency	Select the currency of the payment from the dropdown.
Reconciled Invoice No.	Enter an invoice number if the current payment should be reconciled fully or partly against an invoice. Note that you cannot specify an invoice which has already been selected for reconciliation in another payment journal. Maconomy displays a warning message if you do a partial reconciliation and the amount paid does not match the invoice.
D/C	Specify whether the amount registered is a debit or credit amount. Maconomy suggests debit because a customer payment usually means your company receives a payment.
Released	Specify whether the current payment is released for posting.
Customer Payment Reference	Enter a reference to the current customer payment.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add or delete customer payment lines.</p> <p>For customer payment lines, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Customer Payment - Click this action to insert a customer payment line.

Button	Description
	<ul style="list-style-type: none"> ▪ Delete Customer Payment - Click this action to delete a customer payment line. ▪ View Document ▪ Attach Document
+ Add Customer Payment	Click this action to add another customer payment line to the bottom of the customer payment.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Customer Payments Procedures

This section describes the steps you need to follow to work with customer payments.

Create a Customer Payment Journal

Use these steps to add a new customer payment journal.

To create a customer payment journal:

1. Under the Accounts Receivable menu section, go to the Customer Payments workspace.
2. Click **+New Journal**. The New Journal wizard displays.
3. Select the company name and company number.
4. Click **Create**.
5. Click **+Add Customer Payment**.
6. Enter a description and an amount. These are required fields.

7. Enter information in the other fields as needed.
8. Click **Save**.

Submit and Post a Customer Payment Journal

Use these steps to submit and post a customer payment journal.

To submit and post a customer payment journal:

1. Under the Accounts Receivable menu section, go to the Customer Payments workspace.
2. In the **Search for Customer Payment Journals** field, select the customer payment journal to submit.
3. Enter or update information in the fields as needed.
4. Click **Submit**. Then, click **Post**.

Attach a Document in the Customer Payment Journal

Use these steps to attach documents to a customer payment journal.

To attach a document in a customer payment journal:

1. Under the Accounts Receivable menu section, go to the Customer Payments workspace.
2. Use the **Search for Customer Payment Journals** field to select a customer payment journal.
3. From the **Other Actions** drop-down list, select **Attach Document**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the file/s that you want to upload.
6. Click **Open**, or press **ENTER**.
Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.

View a Document

You can view any document listed in the Customer Payments sub-tab.

To view a document:

1. Under the Accounts Receivable menu section, go to the Customer Payments workspace.
2. Use the search filter and/or the **Search** field to select a customer payment journal.
3. In the Customer Payments tab, select a line.

4. Click **Row Tools » View Document**.
The file is downloaded to your computer/device.

Customer Reports

For information on the report workspaces under this submenu, go to [Customer Reports](#) on page 437.

Accounts Payable

This section covers conceptual information, procedures, and field descriptions for all workspaces that are used to manage vendor-related activities.

Vendors

Finance users can utilize this workspace to view and work with vendor information.

Vendor Concepts

Specifically, the Vendors workspace allows you to do the following:

- Create vendors
- Edit vendor information
- Submit vendors for approval (if approval hierarchies are set up)
- Approve or reject vendors (if approval hierarchies are set up)
- Delete vendors
- Attach documents to vendors
- View vendor documents

Vendor Fields




This section describes the fields and actions on the Vendors workspace.

Card Part Fields

Field	Description
Vendor	Copy to come.
Vendor Number	Copy to come.
Status	Copy to come.

Card Part Actions

Button	Description
+ New Vendor	Copy to come.

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Copy to come.
Revert	Copy to come.
Submit	Copy to come.
Approve	Copy to come.
Other Actions	In the Vendors workspace, this drop-down list includes the following actions: <ul style="list-style-type: none"> ▪ Copy to come.

Vendor Procedures

This section describes the steps you need to follow to work with vendors.

Create a Vendor

Use these steps to add a new vendor.

To create a vendor:

1. Under the Accounts Payable menu section, click the **Vendors** workspace.
2. Click **+ New Vendor**.
The New Vendor wizard displays.
3. Enter a vendor name. This is a required field.
4. If needed, fill out the other fields in the wizard.
5. Click **Create**.
Maconomy creates the vendor and displays the vendor information on the workspace.
6. If needed, you can specify additional information about the vendor using the other tabs in the workspace.
7. Click **Save**.

Edit Vendor Information

Use these steps to edit information for an existing vendor. The same steps apply to vendors and company vendors.

To edit vendor information:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select the vendor you need to edit.
Maconomy displays the vendor you selected on the workspace.
3. Go to the appropriate tab and make the necessary changes.
4. Click **Save**.

Submit a Vendor

If approval hierarchies are set up for the company, use these steps to submit a vendor for approval. The same steps apply to vendors and company vendors.

To submit a vendor for approval:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select a vendor.
Maconomy displays the vendor you selected on the workspace.
3. Click **Submit**.

Approve or Reject a Vendor

If approval hierarchies are set up for the company, use these steps to review a vendor submitted for your approval. The same steps apply to vendors and company vendors.

To approve or reject a vendor :

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select a vendor.
Maconomy displays the vendor you selected on the workspace.
3. To approve the vendor:
 - a) Click **Approve**.
4. To reject the vendor:
 - a) From the **Other Actions** dropdown list, select **Reject**.
Maconomy displays the Reject wizard.
 - b) Enter a rejection remark. This is a required field.

- c) Click **Reject**.

Delete a Vendor

Use these steps to delete a vendor from the database. The same steps apply to vendors and company vendors.

To delete a vendor:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select the vendor you need to delete.
3. From the **Other Actions** dropdown list, select **Delete**.
A confirmation dialog displays.
4. Click **Delete** to confirm or **Cancel** to exit without deleting.

Attach Documents

Use these steps to attach a document to a vendor. The same steps apply to vendors and company vendors.

To attach a document:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
 2. Use the search filter and/or the **Search** field at the top of the workspace to select a vendor.
 3. Go to the Documents tab.
 4. Click **Attach Documents**.
The Attach Document wizard displays.
 5. Click **Select files** to open your file explorer.
 6. Select the file/s you want to upload.
 7. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the wizard. You can opt to delete some of the files before performing the upload.
- Note:** Instead of performing steps 5-7, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document wizard.
8. Click **Ok**.
Maconomy saves your changes, and lists the attached document/s in the Documents tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

View Vendor Documents

You can view any document listed in the Documents tab. The same steps apply to vendors and company vendors.

To view a document:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select a vendor.
3. Go to the Documents tab.
4. On the line for the document you need to view, click **Row Tools » View Document**. The file is downloaded to your computer/device.

Company Vendors

Finance users can utilize this workspace to view and work with company vendor information.

Company Vendor Concepts

Specifically, the Company Vendors workspace allows you to do the following:

- Create company vendors
- Edit company vendor information
- Submit company vendors for approval (if approval hierarchies are set up)
- Approve or reject company vendors (if approval hierarchies are set up)
- Delete company vendors
- Attach documents to company vendors
- View company vendor documents

Company Vendor Fields




This section describes the fields and actions on the Company Vendors workspace.

Card Part Fields

Field	Description
Vendor	Copy to come.
Vendor Number	Copy to come.

Field	Description
Status	Copy to come.

Card Part Actions

Button	Description
+ New Company Vendor	Copy to come.
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Copy to come.
Revert	Copy to come.
Submit	Copy to come.
Approve	Copy to come.
Other Actions	In the Company Vendors workspace, this drop-down list includes the following actions: <ul style="list-style-type: none"> Copy to come.

Company Vendor Procedures

This section describes the steps you need to follow to work with company vendors.

Create a Company Vendor

Use these steps to add a new company vendor.

To create a company vendor:

- Under the Accounts Payable menu section, click the **Company Vendors** workspace.
- Click **+ New Company Vendor**.
The New Company Vendor wizard displays.
- Enter a vendor name. This is a required field.
- If needed, fill out the other fields in the wizard.

5. Click **Create**.
Maconomy creates the company vendor and displays the company vendor information on the workspace.
6. If needed, you can specify additional information about the company vendor using the other tabs in the workspace.
7. Click **Save**.

Edit Vendor Information

Use these steps to edit information for an existing vendor. The same steps apply to vendors and company vendors.

To edit vendor information:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select the vendor you need to edit.
Maconomy displays the vendor you selected on the workspace.
3. Go to the appropriate tab and make the necessary changes.
4. Click **Save**.

Submit a Vendor

If approval hierarchies are set up for the company, use these steps to submit a vendor for approval. The same steps apply to vendors and company vendors.

To submit a vendor for approval:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select a vendor.
Maconomy displays the vendor you selected on the workspace.
3. Click **Submit**.

Approve or Reject a Vendor

If approval hierarchies are set up for the company, use these steps to review a vendor submitted for your approval. The same steps apply to vendors and company vendors.

To approve or reject a vendor :

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select a vendor.
Maconomy displays the vendor you selected on the workspace.
3. To approve the vendor:

- a) Click **Approve**.
4. To reject the vendor:
 - a) From the **Other Actions** dropdown list, select **Reject**.
Maconomy displays the Reject wizard.
 - b) Enter a rejection remark. This is a required field.
 - c) Click **Reject**.

Delete a Vendor

Use these steps to delete a vendor from the database. The same steps apply to vendors and company vendors.

To delete a vendor:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select the vendor you need to delete.
3. From the **Other Actions** dropdown list, select **Delete**.
A confirmation dialog displays.
4. Click **Delete** to confirm or **Cancel** to exit without deleting.

Attach Documents

Use these steps to attach a document to a vendor. The same steps apply to vendors and company vendors.

To attach a document:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select a vendor.
3. Go to the Documents tab.
4. Click **Attach Documents**.
The Attach Document wizard displays.
5. Click **Select files** to open your file explorer.
6. Select the file/s you want to upload.
7. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the wizard. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 5-7, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document wizard.

8. Click **Ok**.

Maconomy saves your changes, and lists the attached document/s in the Documents tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

View Vendor Documents

You can view any document listed in the Documents tab. The same steps apply to vendors and company vendors.

To view a document:

1. Under the Accounts Payable menu section, click **Vendors** or **Company Vendors**.
2. Use the search filter and/or the **Search** field at the top of the workspace to select a vendor.
3. Go to the Documents tab.
4. On the line for the document you need to view, click **Row Tools » View Document**. The file is downloaded to your computer/device.

Purchase Orders

The Purchase Orders workspace allows you to create and maintain purchase orders.

Purchase Order Concepts

You can:

- Create, edit, submit, and print POs.
- Add documents as attachments to the PO.
- View the status of a PO's header/lines.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notification is included:

- **Rejected Purchase Order** - Appears for the user to indicate that a submitted PO has been rejected. This notification points to the relevant PO.

Purchase Order Fields

This section describes the fields and actions on the Purchase Orders workspace.

Card Part Fields

Field	Description
Description	This field displays a brief description of the PO. You can enter a value for this field or update as needed. This is a free-text field.
Purchase Order No.	This field displays the PO number.

Details Island

Field	Description
Requisitioner	This field displays the employee name or number of the employee who requisitioned the items on the current PO. You can enter a value for this field or update it as needed. If you do not specify a value, Maconomy automatically selects the employee name of the user creating the PO.
Submitted by	This field displays the name of the employee who submitted the current PO.
Approved by	This field displays the name of the employee who performed the final approval of the current PO. If you use approval hierarchies for the approval of POs, and if the current PO has been approved by more than one employee, this field displays the name of the employee who made the latest approval of the purchase order.
Closed by	This field displays the name of the user who closed the current PO.
Remarks	This field displays remarks about the purchase order. You can enter a value for this field or update it as needed.
Company	This field displays the name and number of the company responsible for the purchase order. You can enter a value for this field or update it as needed.
Location	This field displays the value for the Location dimension.
Entity	This field displays the value for the Entity dimension.
Project	This field displays the value for the Project dimension.

Vendor Island




Field	Description
Name 1	This field displays the name and number of the pay to vendor. Update the information as needed.
Name 2-4	This field displays the address of the vendor. Update the information as needed.
Zip Code	This field displays the zip code of the postal district of the vendor address. Update the information as needed.
Postal District	This field displays the postal district of the vendor address. Update the information as needed.
Country	This field displays the country in which the vendor resides. Update the information as needed.
Name 5	This field displays any additional information regarding the vendor's address. Update the information as needed.
Attention	This field displays the name of the intended recipient of the address. Update the information as needed.
Phone	This field displays the vendor's phone number. Update the information as needed.
E-mail	This field displays the vendor's email address. Update the information as needed.

Price Island

Field	Description
Currency	This field displays the vendor's currency. You can select a value for this field or update it as needed.
Line Sum, Currency	This field displays the sum of prices based on values entered in the Price field on the Specifications tab. The value in this field is displayed in the currency of the PO.
Invoice Discount %	This field displays the invoice discount percentage. The invoice discount is deducted from the line sum, and this is shown on the purchase order printout. The vendor can then see how much you expect to be invoiced for. Note that an invoice discount % is added to any discount entered on individual purchase order table lines. You can enter a value for this field or update it as needed.
Invoice Discount, Currency	This field displays the invoice discount amount specified in the purchase order. For PO lines with items, any invoice discount is deducted from prices for the individual item lines, before the items are placed in the warehouse. This ensures that costs are correct.

Field	Description
	You can enter a value for this field or update it as needed.
Expense %	This field displays an expense percentage, such as for a handling charge. You can enter an estimated expense percentage (based on previous charges), or update the value as needed.
Delivery Costs	This field displays the amount representing expenses for items purchased on the current order, such as for a handling charge. You can enter an estimated amount (based on previous charges), or update the value as needed.
Invoice Tax Sum	This field displays the total amount in taxes.
Invoice Amount	This field displays the total invoice amount including tax and discounts.

Card Part Actions

Button	Description
+ New Purchase Order	Click this action to create a purchase order.
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. <div>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</div>
Approve	Click this action button to approve the current record.

Button	Description
	<p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Reject...	<p>Click this action button to reject the current record.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Other Actions	<p>In the Purchase Orders workspace, this drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ Close ▪ Reopen ▪ Print ▪ Copy From - Select this action to copy lines from a PO, and add these lines to the PO you are currently working on. ▪ Attach Documents ▪ Undo Approval/Reject ▪ Delete Purchase Order

Specifications Tab






This section describes the fields and actions on the Specifications tab of the Purchase Orders workspace.


Tab Fields

Field	Description
Job No.	Enter the number of a job.
Job Name	This field displays the name of the job specified in the Job No. field on the selected line.
Task	<p>For lines with a job number, enter or select a task from the drop-down list.</p> <p>If you enter a value in the field, Maconomy checks that a task list has been assigned to the job and that the listing contains the specified task.</p>
Employee	Enter or select from the drop-down list the number and name of the employee assigned to the PO line.
Quantity	Enter the quantity of services or items ordered.

Field	Description
Unit Price	Enter the unit price of the item. Maconomy checks that the amount is positive. The amount must be exclusive of tax.
Price	Enter the price of the PO line. The amount is calculated as quantity times unit price less any discount. If you manually enter an amount in this field, Maconomy recalculates the unit price based on the total amount in this field.
Line Remarks	Enter any remarks you wish to add to the PO line. This is printed on the PO.
Description	Enter a description of the PO line.
Delivery Date	Select the delivery date.
Approval Status Details	This field displays the approval status of the current line.

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Specifications tab, choose from the following actions: <ul style="list-style-type: none"> ■ Insert Purchase Order Line ■ Delete Purchase Order Line
+ Add Purchase Order Line	Click this action to add another entry line to the bottom of the purchase order.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.

Button	Description
	Click this icon to open the Customize Columns window.



Documents Tab





This section describes the fields and actions on the Documents tab of the Purchase Orders workspace.

Tab Fields

Field	Description
Document	This field displays the file name of the document attached to the PO. The field is automatically filled in by Maconomy and cannot be changed manually. Click on the file name to download the document.
Type	This field displays the file type/format of the document attached to the PO (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the PO.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the PO.
Changed By	This field displays the name of the last user to upload the file/document to the current PO.
Remark	Enter any additional remarks in this field.

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Documents tab, choose from the following actions: <ul style="list-style-type: none"> ■ Update Document ■ Delete Document ■ View Document
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.

Button	Description
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.


Purchase Order Procedures

This section describes the steps you need to follow to work with purchase orders.

Create a Purchase Order

Use these steps to add a new purchase order.

To create a purchase order:

1. Go to the Purchase Orders workspace.
2. Click **+ New Purchase Order**.
The Create Purchase Order wizard displays.
3. Enter a description. This is a free-text field.
4. Specify a requisitioner. This field defaults to the employee name of the user currently logged in, but you can select another employee.
5. Select a vendor. This is a required field.
6. Click **Create**.
Maconomy automatically navigates to the PO you just created, and saves your changes.
7. To add PO lines, click **+ Add Purchase Order Line**.
8. Enter a job number.
9. Enter a task.
10. Fill out the other fields as needed.
11. Click  **Save**.

Copy from another Purchase Order

Use these steps to copy lines from an existing PO to the PO you are currently working on.

To copy lines from another purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select the purchase order you want to edit.
3. From the **Other Actions** drop-down list, select **Copy From**.
The Copy From Purchase Order wizard displays.
4. Specify the PO from which you want to copy lines.
5. Click **Copy From Purchase Order**.
Maconomy adds the copied lines to the Specifications tab of the current PO and automatically saves your changes.

Edit a Purchase Order

Use these steps to edit a purchase order.

To edit a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. Edit the fields as needed.
4. Click **Save** or press ENTER.

Attach Documents to a Purchase Order

Use these steps to attach documents to a purchase order.

To attach a document to a purchase order:

1. Under the Accounts Payable menu section, go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. From the **Other Actions** drop-down list, select **Attach Documents**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the file/s that you want to upload.
6. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy saves your changes, and lists the new attachment in the Documents tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

View a Document

You can view any document listed in the Documents tab.

To view a document:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a purchase order.
3. In the Documents tab, select a line.
4. Click **Row Tools » View Document** on the line.
The file is downloaded to your computer/device.

Note: Clicking the filename displayed in the **Document** field also downloads the file to your local storage.

Submit a Purchase Order

Use these steps to submit a purchase order.

To submit a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. Click **Submit**.

Approve or Reject a Purchase Order

Use these steps to review and approve or reject new/updated purchase orders submitted for your approval. You can also approve (and reject) purchase orders in the Approval Center workspace.

To approve or reject a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. To approve the PO:
 - a) Click **Approve**.

Note: Maconomy approves the header and any of the lines that the user is also responsible for approving.

4. To reject the PO:
 - a) Click **Reject...**
Maconomy displays the Reject Line wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Close a Purchase Order

Use these steps to close a purchase order.

To close a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. From the **Other Actions** drop-down list, select **Close**.

Reopen a Purchase Order

Use these steps to reopen a purchase order.

To reopen a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. From the **Other Actions** drop-down list, select **Reopen**.

Print a Purchase Order

Use these steps to print a purchase order.

To print a purchase order:

1. Go to the Purchase Orders workspace.
2. Use the search filter and/or the **Search** field to select a PO.
3. From the **Other Actions** drop-down list, select **Print**.
The purchase order prints at your default printer.

Invoice Allocation

The Invoice Allocation workspace provides a simple process for allocating vendor invoices to accounts or jobs.

Invoice Allocation Concepts

You can:

- Allocate/reallocate vendor invoices to accounts or jobs.
- Reconcile vendor invoices against purchase orders.
- Upload and view one or more documents associated with the vendor invoice.
- Review, approve, and post allocated vendor invoices.
- Filter and sort invoices using the list view.
- Easily view the status of an invoice allocation using at-a-glance coloring fields.

This workspace is listed under the Accounts Payable section of the menu.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notifications are included:

- **Vendor Invoice for Allocation** - Appears for the user responsible for the allocation to indicate that a vendor invoice is ready for allocation. This notification points to the Invoice Allocation workspace.
- **Rejected Vendor Invoice** - Appears for the user to indicate that a submitted vendor invoice has been rejected. This notification points to the Invoice Allocation workspace.

Invoice Allocation Fields

This section describes the fields and actions on the Invoice Allocation workspace.




Card Part

Field	Description
Invoice Number	This field displays the invoice or credit memo number.
Vendor Number	This field displays the number of the vendor to which the invoice/credit memo is associated with.
Vendor Name	This field displays the name of the vendor to which the invoice/credit memo is associated with.

Field	Description
Type	This field specifies whether the record is an invoice or a credit memo.
Invoice Date	This field displays the date of the invoice or credit memo.
Due Date	This field displays the date on which the invoice or credit memo is due for payment.
Responsible for Allocation	Select the employee name or number of the employee who is responsible for allocation.
Purchase Order Number	<p>If the current record is related to a purchase order placed with the vendor, select a PO.</p> <p>When you click the Get Purchase Order action, Maconomy automatically creates allocation lines for each open line in the selected purchase order.</p>
Invoice	<p>This field displays the following information:</p> <ul style="list-style-type: none"> ▪ The total amount (excluding tax) available for invoicing ▪ The total amount taxed according to the selected tax code ▪ The total amount (including tax) available for invoicing
For Reallocation	<p>This field displays the following information:</p> <ul style="list-style-type: none"> ▪ The total amount (excluding tax) available for reallocation ▪ The total amount taxed according to the selected tax code ▪ The total amount (including tax) available for reallocation
Allocated	<p>This field displays the following information:</p> <ul style="list-style-type: none"> ▪ The total allocated amount (excluding tax) for the lines in the sub-tab ▪ The total amount taxed according to the selected tax code ▪ The total allocated amount, (including tax) for the lines in the sub-tab
Unallocated	<p>This field displays the following information:</p> <ul style="list-style-type: none"> ▪ The total unallocated amount (excluding tax) for the lines in the sub-tab ▪ The total amount taxed according to the selected tax code ▪ The total unallocated amount (including tax) for the lines in the sub-tab
Status	This field displays the status of the current record. Possible values include:

Field	Description
	<ul style="list-style-type: none"> ▪ Awaits Allocation ▪ Allocation Started ▪ Awaits Approval ▪ Awaits Posting ▪ Allocation Completed
Vendor	This field displays the vendor name and number of the vendor who sent the invoice or credit memo.

Card Part Actions

Button	Description
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action to undo changes made to the current record, or to any of its lines.
Submit for Approval	Click this action to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.
Approve	Click this action to approve the invoice or credit memo. This action is available only for users with the requisite access rights.
Reject....	Click this action reject the invoice or credit memo. This action is available only for users with the requisite access rights.
Attach Document	Click this action to attach documents to the record.
Other Actions	Each workspace includes an Other Actions drop-down list. Available actions vary slightly from one workspace to another. In the Invoice Allocation workspace, the drop-down list includes the following actions:

Button	Description
	<ul style="list-style-type: none"> ▪ Get Purchase Order - If you chose a PO in the Purchase Order Number field, selecting this action enables Maconomy to automatically create allocation lines for each open line in the selected purchase order. ▪ Allocate Remainder - Select this action to allocate the remaining amount for invoicing. ▪ Undo Approval/Reject

Allocation Sub-Tab


This section describes the fields and actions on the Allocation sub-tab of the Invoice Allocation workspace.






Sub-Tab Fields

Field	Description
Purchase Line Type	<p>Select the purchase type represented by the line from the drop-down list.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> ▪ Fixed Asset ▪ Inventory ▪ Job Cost ▪ G/L ▪ Text Line ▪ Subcontractor Reconciliation
Job	<p>If the current line is allocated to a job, select the job from the drop-down list.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p>Note: If the allocation is job-related, you must leave the Account Number and Local Account Number fields blank.</p> </div>
Task	<p>If a task listing is assigned to the job, select a task from the drop-down list.</p>
Employee	<p>If the current line is related to an employee, select the employee from the drop-down list.</p>
Account Number	<p>If the current line is related to a purchase, select an account to which the amount should be debited.</p>

Field	Description
	Note: If the allocation is purchase related, you must leave the Job field blank.
Local Account Number	<p>If the current line is related to a purchase, select a local account to which the amount should be debited.</p> <p>Note: If the allocation is purchase related, you must leave the Job field blank.</p>
Entry Description	Enter a description for the allocation.
Quantity	Enter the quantity of the allocation.
Unit Price	Enter the unit price for the current line. This field uses the currency of the current vendor invoice.
Amount Excluding Tax	This field displays the amount to be allocated, excluding tax.
Tax Code 1	Select a G/L tax code to apply to the current line.
Tax Amount 1	This field displays the taxed amount according to the selected code in the Tax Code 1 field.
Amount Including Tax	This field displays the amount to be allocated, including tax.
Company Number	Select the company responsible for the current line from the drop-down list.
Location	This field displays the value for the Location dimension.
Entity	This field displays the value for the Entity dimension.
Status	This field displays the line's current approval status.

Sub-Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record.

Button	Description
	<p>For lines in the Allocation Line sub-tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Allocation Line ▪ Delete Allocation Line
+ Add Allocation Line	Click this action to add another entry line to the bottom of the invoice.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	Click this icon to open the Customize Columns window.

Documents Sub-Tab


This section describes the fields and actions on the Documents sub-tab of the Invoice Allocation workspace.

Sub-Tab Fields

Field	Description
Document	This field displays the file name of the document attached to the invoice. The field is automatically filled in by Maconomy and cannot be changed manually. Click on the file name to download the document.
Type	This field displays the file type/format of the document attached to the invoice (for example: .doc, .xls, .ppt, and so on). The field is automatically filled in by Maconomy and cannot be changed manually.
Size	This field displays the file size (in bytes) of the document attached to the invoice.
Changed On	This field displays the date on which the file/document was last modified. If the file has not been modified, the field shows the date on which the file was attached to the invoice.

Field	Description
Changed By	This field displays the name of the last user to upload the file/document to the current invoice.
Remark	Enter any additional remarks in this field.

Sub-Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Document sub-tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Delete Document

Invoice Pane

This section describes the fields and actions on the Invoice pane of the Invoice Allocation workspace.

If you open a record that included a scanned invoice when it was registered, Maconomy automatically displays the scanned document in the Invoices pane on the right-hand side of the Invoice Allocation workspace. If there is no scanned invoice to show, the workspace does not display this pane.

Note: Due to browser limitations, the Document Viewer functionality does not support inline PDFs on tablets (Safari on iPad, Chrome on Android). As a workaround, you can use the download icon to download the PDFs to your device.

Messages Pane

This section describes the fields and actions on the Messages pane of the Invoice Allocation workspace. For more information about the functionality, see "Conversations" under the Getting Started section of this online help.

Messages Area

This contains all the messages about the selected vendor invoice. If you want to delete the last message you sent, simply click the **Delete** icon to the right of that message. You can delete a message within 15 minutes of sending it.

You can also mark specific messages in the conversation as unread. Hover your pointer at the end of the message line, then click the vertical ellipsis that appears. Click **Mark as unread**.

Input Area

This is available at the bottom of the pane. You can type your message here, then press ENTER or click the paper plane icon to send. Each message has a 255-character limit.

Pane Actions

Action	Description
+ Add Participant	Click this action to add a user to the conversation for the selected vendor invoice.
Subscribe/ Unsubscribe	Click this action to subscribe to/unsubscribe from the conversation for the selected vendor invoice.
Send	Click the paper plane icon to send your message.

Invoice Allocation Procedures

This section describes the steps you need to follow to work with vendor invoice allocations.

Allocate/Reallocate a Vendor Invoice

You can allocate invoices, or reallocate invoices that were initially registered or posted to a suspense account, to an account or job.

To allocate/reallocate invoices:

1. Under the Accounts Payable menu, go to **Invoice Allocation > Allocation tab**.
2. Select a vendor invoice from the filter list.
3. Enter information about the allocation in the line as needed.
4. Click **Save**.

Attach Additional Documents to a Vendor Invoice

Apart from attaching an invoice scan to the record, you can also attach multiple documents related to it for reference.

To attach documents to an invoice:

1. Under the Accounts Payable menu section, go to **Invoice Allocation workspace » Allocation tab**.
2. Select a vendor invoice from the filter list.
3. Click **Attach Document**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the file/s that you want to upload.
6. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy saves your changes, and lists the new attachments in the Documents tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

View Documents on a Vendor Invoice

Use the Document tab to upload, view, or delete documents attached to the invoice.

To view documents on an invoice:

1. Under the Accounts Payable menu, go to **Invoice Allocation > Documents tab**.
2. Select a vendor invoice from the filter list.
3. In the **Document** field, click on a filename to download the file to your computer/device.

Remove Attached Documents

You can remove documents attached to a vendor invoice.

To remove an attached document:

1. Under the Accounts Payable menu, go to the Invoice Allocation workspace.
2. Select a vendor invoice from the filter list.
3. Go to the Documents tab.
4. Click the **Row Tools** icon on the line of the document you want to delete.
5. Click **Delete Document**.
6. Click **Delete**.

Submit a Vendor Invoice Allocation

Once you have finalized all details regarding the allocation, you can submit the invoice for approval.

To submit an invoice allocation:

1. Under the Accounts Payable menu, go to the Invoice Allocation workspace.
2. Select a vendor invoice from the filter list.
3. Click **Submit Invoice**.

Approve a Vendor Invoice Allocation

Use these steps to review and approve vendor invoice allocation submitted for your approval. If the submitted invoice contains documents, you can view them before approving or rejecting it. You can also approve (and reject) vendor invoice allocation in the Approval Center workspace.

To approve an invoice allocation:

1. Under the Accounts Payable menu, go to the Invoice Allocation workspace.
2. Select a vendor invoice from the filter list.
3. If you wish to view the invoice or other documents related to the invoice, click **Show Invoice**.
4. Click **Approve for Posting**.

Start a Conversation

You can use the conversations functionality to correspond about a specific record or transaction with other employees in your company.

To start a conversation:

1. Go to the relevant workspace.
2. Select a record or transaction from the filter list.
The Messages pane is found on the right-hand side of the workspace.
3. In the input area of the Messages pane, type your message. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Reply to a Conversation

Use the speech bubble icon in the top right corner of the menu to quickly view and respond to conversations.

To reply to a conversation:

1. To expand the Message Center, click the speech bubble icon.
2. From the dropdown list, expand a record or transaction and click on the message to which you want to reply.
Maconomy navigates to the relevant workspace, and opens the Messages pane for the record or transaction you selected.
3. In the input area, type your reply. If needed, mention a specific person by typing **@[name]** as part of the text.
4. Click the paper plane icon or press ENTER to send the message.

Resource Management

This section covers conceptual information, procedures, and field descriptions for all resource management workspaces.

Resource Management

Use the Resource Management workspace to access the embedded People Planner Resource Management web component.

This workspace is found under the new Resource Management menu section. It is only available if the company-specific **Enable People Planner Web** system parameter is enabled in the corresponding Workspace Client application.

Resource Management Concepts

This workspace allows team leaders, supervisors, department managers and others who have company-wide responsibilities similar to those performed by these roles to carry out their resource planning tasks in Maconomy.

While the Resource Management web component has undergone minor updates to better align with Maconomy, its functionality remains the same.

For more information about this web component and related procedures, search on "Resource Management" in the [Deltak People Planner Web Components Guide](#).

Note: While you can view the web components embedded in Maconomy on your tablet, some actions are only available via right-click menus, and the right-click function is not supported on tablets. Deltak recommends that you view these web components on desktop browsers.

Human Resources

This section covers conceptual information, procedures, and field descriptions for all employee and employee-related workspaces.

Employees

The Employees workspace allows users with the requisite access rights (for example, HR managers) to make changes to other employees' information.

Employees Concepts

If you have the requisite access rights, use the various tabs of the Employees workspace to create employee records, as well as view and/or make changes to other employees' information. Specifically, you can update the following:

- Employee name
- Organizational information
- Emergency contacts
- Parental status
- Education and qualifications
- Work eligibility
- Contact information
- Bank details
- List of skills
- Documents related to hiring and employment

Regular employees do not have access to this workspace or any of its tabs.

Notifications

Notifications quickly inform the concerned employees when they need to perform a specific action. Click the bell icon on the top right corner of the screen to view the dropdown that lists your pending actions.

The following notification is included:

- **Rejected Employee** - Appears for the user to indicate that the submitted employee has been rejected. This notification points to the employee information of the rejected employee.

Employees Fields

This section describes the fields and actions on the Employees workspace. Regular employees do not have access to this workspace or any of its tabs.

Card Part Fields

Field	Description
Employee Name	This field displays the employee's name.
Employee No.	This field displays the employee's number.

Employment Island

Field	Description
Date Employed	This field displays the date the employee started working for the company.
Termination Date	This field displays the date when the employee was terminated.
Position	This field displays the employee's position/job title.
Company	These fields display the name and number of the company in which the employee is employed.
Check-in	<p>This field displays whether multiple check-ins per day are enabled for the employee.</p> <p>Possible values include:</p> <ul style="list-style-type: none"> ▪ Disabled - Multiple check-ins are disabled for the employee. ▪ Optional - The employee can register multiple check-in entries per day. However, the employee is not required to submit check-in entries on any work day. When the employee submits the time sheet, Maconomy does not validate the check-in balance. ▪ Required - If the work day has fixed hours, this option requires the employee to register at least one check-in entry for the day. ▪ Required with Balance - The employee must register at least one check-in entry for the day. Maconomy automatically validates check-in balance when the timesheet is submitted. <p>Update the field value as needed.</p>
Location	<p>This field displays the specified value for the Location dimension, if applicable.</p> <p>Update the field value as needed.</p>

Related Employees Island

Field	Description
Supervisor	This field displays the name and employee number of the employee's manager.
Secretary	This field displays the name and employee number of the secretary to whom the employee is assigned.
Absence Approver	This field displays the name and number of the employee responsible for approving absences for the employee.

Address Island

Field	Description
Name 2-4	These fields display the employee's address. Update the information as needed.
Zip Code	This field displays the zip code of the postal district for the employee's address. Update the information as needed.
Postal District	This field displays the postal district of the employee's address. Update the information as needed.
Country	This field displays the country in which the employee resides. Update the information as needed.
Name 5	This field displays any additional information regarding the employee's address. Update the information as needed.
Phone	This field displays the employee's primary phone number. Update the information as needed.
E-mail	This field displays the employee's work e-mail address.




Bank Information Island

Field	Description
Bank Name	This field displays the name of the employee's bank. Update the information as needed.
Reg. No.	This field displays the bank's registration number. Update the information as needed.
Bank Acc. No.	This field displays the employee's bank account number. Update the information as needed.

Talent Management Island

Field	Description
User ID	This field displays the employee's Talent Management User ID.

Card Part Actions

Button	Description
+ New Employee	Click this action to add a new employee.
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Submit	Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow. </div>
Approve	Click this action button to approve the current record. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow. </div>
Reject...	Click this action button to reject the current record. <div> Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies. </div>
Other Actions	In the Employees workspace, this drop-down list includes the following actions: <ul style="list-style-type: none"> Attach Documents Undo Approval/Reject


Emergency Contacts Tab






This section describes the fields and actions on the Emergency Contacts tab of the Employees workspace.

Tab Fields

Field	Description
Dependent	When you add an emergency contact for the employee, select this check box if the person is the employee's dependent.
Emergency Contact	Select this check box if this person is the employee's emergency contact.
Name	Enter the emergency contact person's name.
Address 1-4	In these fields, enter the emergency contact's address.
Zip Code	In this field, you can enter the zip code of the postal district for the emergency contact's address.
Postal District	In this field, you can specify the postal district for the emergency contact's address.
Country	In this field, you can specify the country where the emergency contact resides.
Home Phone	In this field, you can specify the emergency contact's home phone number.
Mobile Phone	In this field, you can specify the emergency contact's mobile phone number.
Email	In this field, you can specify the emergency contact's e-mail address.
Relationship	In this field, enter the emergency contact's relationship to the employee.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Emergency Contacts tab, choose from the following actions:</p> <ul style="list-style-type: none"> ■ Insert Emergency Contact ■ Delete Emergency Contact

Button	Description
+ Add Emergency Contact	Click this action to add another emergency contact to an employee's list.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.







Parental Status Tab

This section describes the fields and actions on the Parental Status tab of the Employees workspace.

Tab Fields

Field	Description
Parental Status Type	<p>Select one of the following values from the drop-down list:</p> <ul style="list-style-type: none"> Solo Parent With Spouse <p>Companies set up the options that appear in the drop-down list. Define values for the Parental Status popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.</p>
Description	<p>In this field, enter additional information about the employee's parental status.</p> <p>This is a free-text field.</p>

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Parental Status tab, choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Parental Status ▪ Delete Parental Status
+ Add Parental Status	Click this action to update an employee's parental status information.
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	Click this icon to open the Customize Columns window.

Education and Qualifications Tab


This section describes the fields and actions on the Education and Qualifications tab of the Employees workspace.






Tab Fields

Field	Description
Country	Choose the country where the employee obtained the qualification from the drop-down list.
Qualification Type	<p>Choose the type of qualification from the drop-down list.</p> <p>Companies set up the options that appear in the drop-down list. Define values for the Qualification Type popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.</p>
Qualification Suffix	Enter the qualification suffix.

Field	Description
Education Institution	<p>Choose the institution where the employee received the qualification from the drop-down list.</p> <p>Companies define their own values for this drop-down list, with the options changing depending on the country specified in the Country field.</p> <p>You can also type in the name of the institution.</p>
Education Subject	Enter the subject in which the employee received the qualification.
Qualification Level	<p>Choose the qualification level from the drop-down list.</p> <p>Companies set up the options that appear in the drop-down list. Define values for the Qualification Level popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.</p>
Qualification Date	Click the calendar icon to choose the date on which the employee became qualified.
Expiry Date	Click the calendar icon to choose the date on which this qualification expires.
Document Check Date	Click the calendar icon to choose the date on which the education and qualifications document was checked.
Document Check Person Empl. No.	<p>Choose the employee number of the person who performed the document check from the drop-down list.</p> <p>If you specify a value here, Maconomy auto-populates the Document Check Person field (and vice versa).</p>
Document Check Person	<p>Choose the name of the employee who performed the document check from the drop-down list.</p> <p>If you specify a value here, Maconomy auto-populates the Document Check Person Empl. No. field (and vice versa).</p>
Qualification Held	This field calculates and displays the number of years the employee has had this qualification.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Education and Qualifications tab, choose from the following actions:</p> <ul style="list-style-type: none"> ■ Insert Education and Qualification ■ Delete Education and Qualification

Button	Description
+ Add Education and Qualification	Click this action to add to an employee's list of educational qualifications.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Work Eligibility Tab




This section describes the fields and actions on the Work Eligibility tab of the Employees workspace.




Tab Fields

Field	Description
Eligibility Country	This field displays the country in which the employee is eligible to work.
Eligibility Status	Choose the employee's eligibility status from the drop-down list. The values available in the drop-down list are dependent on the Eligibility Status option list specified for the country selected in the Eligibility Country field.
Eligibility Type	Choose the employee's eligibility type from the drop-down list. Companies set up the options that appear in the drop-down list. Define values for the Eligibility Type popup type in the sub-tab of the Popup Fields single dialog in the Workspace Client.
Eligibility Document	Choose the eligibility document from the drop-down list. The values available in the drop-down list are dependent on the Eligibility Document option list specified for the country selected in the Eligibility Country field.

Field	Description
Document Number	In this field, enter the document number for the employee's eligibility document.
Start Date	Click the calendar icon to choose the date when the eligibility period begins.
Expiry Date	Click the calendar icon to choose the date when the eligibility period expires.
Issuer	In this field, enter the name of the organization that issued the employee's eligibility document.
Issuing Sponsor	In this field, enter the name of the sponsor who issued the employee's eligibility document.
Document Check Date	Click the calendar icon to choose the date on which the eligibility document was checked.
Document Check Person No.	In this field, choose the employee number of the person who performed the document check from the drop-down list. If you specify a value here, Maconomy auto-populates the Document Check Person field (and vice versa).
Document Check Person	In this field, choose the name of the employee who performed the document check from the drop-down list. If you specify a value here, Maconomy auto-populates the Document Check Person No. field (and vice versa).

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Work Eligibility tab, choose from the following actions: <ul style="list-style-type: none"> ■ Insert Work Eligibility ■ Delete Work Eligibility
+ Add Work Eligibility	Click this action to add to an employee's work eligibility information.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.

Button	Description
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Employee Skills Tab







This section describes the fields and actions on the Employee Skills tab of the Employees workspace.

Tab Fields

Field	Description
Skill Type	<p>This field displays the classification of the specified skill. Examples of skill types are Languages, Travel Preferences, or Technical.</p> <p>Companies set up all skill-related information in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for the Skill No. field, Maconomy auto-populates this field with the corresponding skill type.</p>
Skill No.	<p>Choose the skill number from the drop-down list.</p> <p>Companies set up the values that appear in the drop-down list (and other skill-related information) in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for this field, Maconomy auto-populates the Skill Type and Skill Name fields.</p>
Skill Name	<p>This field displays the name of the skill that is associated with the specified skill number.</p> <p>Companies set up all skill-related information in the Skills single dialog in the Workspace Client.</p> <p>When you specify a value for the Skill No. field, Maconomy auto-populates this field with the corresponding skill name.</p>
Level	<p>Choose the employee's proficiency level in this skill from the drop-down list.</p> <p>If automatic level specification is enabled in the Skills single dialog in the Workspace Client, Maconomy auto-populates this field.</p>
Skill Acquired	<p>Click the calendar icon to choose the date on which the employee acquired this skill.</p>

Field	Description
Level Acquired	Click the calendar icon to choose the date on which the employee attained the level specified for this skill.

Tab Actions

Button	Description
	The Row Tools icon allows you to add lines/information to the lines of a record. For lines in the Employee Skills tab, the following action is available: <ul style="list-style-type: none"> ▪ Delete Employee Skill
+ Add Employee Skill	Click this action to add to an employee's list of skills.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.
	Click this icon to open the Customize Columns window.

Documents Tab







This section describes the fields and actions on the Documents tab of the Employees workspace.

Tab Fields

Field	Description
Document	This field displays the document name.
Type	This field displays the document file type.

Field	Description
Size	This field displays the document file size.
Changed On	This field displays the date on which the document was last changed.
Changed By	This field displays the name of the user who last changed the document.
Remark	Enter any appropriate comments in this field.

Tab Actions

Button	Description
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>For lines in the Documents tab, choose from the following actions:</p> <p>Documents Tab</p> <ul style="list-style-type: none"> ▪ Update Document ▪ Delete Document ▪ View Document
	<p>Click this icon to export the rows from the current table to a spreadsheet.</p> <p>Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.</p>
	<p>Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.</p>
 	<p>Click this icon to maximize the table view.</p> <p>Click this icon to restore the default display size of the table.</p>
	<p>Click this icon to open the Customize Columns window.</p>

Employees Procedures

This section describes the steps you need to follow to update other employees' personal data.

Use the Employees workspace to do the following:

Create an Employee

Use these steps to add a new employee, and to assign user credentials to that employee. You can create the employee from an employee template. You also have the option to copy user setup from the template to the new employee.

To create an employee:

1. Go to **Human Resources » Employees**.
2. Click **+ New Employee**.
The Create Employee wizard displays.
3. In the **Employee Name** field, type the name of the new employee. This is a required field.
4. Under the Address island, select a country from the drop-down list. This is a required field.
5. If you want to create the employee from a template, select the template employee name from the drop-down list under the Template Employee island. Otherwise, fill out the other fields as needed.
6. Click **Continue**.
The Create User wizard displays.
7. To create a user from a user type:
 - a) Under the Create User from Type island, toggle on the **Create User** option.
 - b) In the **Type** field, select a user type from the drop-down list.
 - c) Click **Create**.
A Notification dialog displays the password for the new user.
 - d) Click **Ok**.

Maconomy saves your changes, and refreshes the page. The Employees workspace now displays information for the employee you just created.

8. To create a user from a template:
 - a) Under the Create User from Template island, toggle on the **Copy User from Template** option.

Warning: Make sure you only toggle on one option. If you enable both the **Create User** and **Copy User from Template** options, Maconomy will create two users for the employee.

- b) Click **Create**.
A Notification dialog displays the password for the new user.

c) Click **Ok**.

Maconomy saves your changes, and refreshes the page. The Employees workspace now displays information for the employee you just created.

Update Another Employee's Information

Use these steps to update another employee's personal data.

To update another employee's information:

1. Go to the Employees workspace.
2. Use the search filter and/or the **Search** field to select an employee.
3. Update the card fields as needed.
4. Click **Save** or press ENTER.
5. If you need to make changes in any of the tabs, navigate to a specific tab.
6. To add line information, click the **+ Add...** action.
7. Fill out the line fields as needed.
8. Click **Save** or press ENTER.
9. To edit existing line information, click a line field and edit as needed.
10. Click **Save** or press ENTER.

Submit Employee Information

Use these steps to submit new or updated employee information.

To submit an employee record:

1. Under the Human Resources menu section, go to the Employees workspace.
2. Use the search filter and/or the **Search** field to select an employee.
3. Click **Submit**.

Approve or Reject Employee Information

Use these steps to review and approve or reject new/updated employee information submitted for your approval. You can also approve (and reject) employee records in the Approval Center workspace.

(Optional) Enter the prerequisites here. This should be relatively brief. If you need to write extensive prereq info, create a reference topic for it and combine the topics using a small ditamap. Be sure to keep the first sentence in the <p> element.

To approve/reject an employee record:

1. Under the Human Resources menu section, go to the Employees workspace.

2. Use the search filter and/or the **Search** field to select an employee record.
3. To approve the employee record:
 - a) Click **Approve**.
4. To reject the employee record:
 - a) Click **Reject....**
Maconomy displays the Reject Line wizard.
 - b) Enter a rejection reason. This is a required field.
 - c) Click **Reject**.

Attach Another Employee's Documents

Use these steps to add hiring/employment documents to an employee's personal data.

To attach documents:

1. Under the Human Resources menu section, go to **Employees workspace » Documents tab**.
2. Use the search filter and/or the **Search** field to select an employee.
3. From the **Other Actions** drop-down list, select **Attach Documents**.
4. In the dialog that opens, click **Select files** to open your file explorer.
5. Select the file/s that you want to upload.
6. Click **Open**, or press ENTER.
Maconomy lists the file/s you selected in the dialog. You can opt to delete some of the files before performing the upload.

Note: Instead of performing steps 4-6, you can opt to select the file/s from your file browser window, then drag and drop them into the Attach Document dialog.

7. Click **Ok**.
Maconomy saves your changes, and lists the new attachments in the Documents tab.

Note: If you want to enter additional remarks for a specific document, you can fill out the **Remark** field for that document in the Documents tab. Click **Save**, or press ENTER to save the information.

View Another Employee's Documents

Use these steps to view another employee's hiring/employment documents.

To view documents:

1. Go to the Employees workspace.
2. Use the search filter and/or the **Search** field to select an employee.

3. In the Documents tab, select a line.
4. Click **Row Tools » View Document** on the line.
The file is downloaded to your computer/device.

Note: Clicking the filename displayed in the **Document** field also downloads the file to your local storage.

Schedule an Update to Employee Information

Use these steps to schedule updates to employee information so that these take effect on the date you specify.

To schedule an update to an employee's information:

1. Go to **Human Resources » Employees**.
2. Use the search filter and/or the **Search** field to select an employee.
3. In the Revisions tab, click **+ Add Employee Revision**.
Maconomy adds a new line to the table.
4. In the **From Date** field, specify the date on which you want the update to the employee's information to take effect. This is a required field.
5. Click **Save**.
6. In the relevant field on the line, specify the new information.
7. Click **Save**.
Maconomy saves your changes, and will reflect the updated information for the employee on the date you specified.

Employee Reports

For information on the report workspaces under this submenu, go to [Employee Reports](#) on page 439.

Access Control

This section covers conceptual information, procedures, and field descriptions for users and access-related workspaces.

Users

Use this workspace to maintain data about users, their roles, and access privileges.

Users Concepts

You can use this workspace to:

- Create new roles for users.
- Maintain data on existing users and their respective roles.
- Assign access privileges to users.
- Search for users.
- Reset passwords.




Users Fields

This section describes the fields and actions on the Users workspace.

Card Part Fields

Field	Description
Name	Copy to come.

Card Part Actions

Button	Description
+ New User	Copy to come.
	Click this icon to refresh data in the current workspace.
 	Click to display the list view. Click to display the detailed view.

Button	Description
Save	Click this action button to save changes to the current record. After saving changes, the record status updates accordingly, and the Save action button is disabled until additional changes are made.
Revert	Click this action button to undo changes made to the current record, or to any of its lines.
Reset Password	Copy to come.
Submit	<p>Click this action button to submit a record for approval. After submission, the record status is updated, and this action is disabled until you make additional changes.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Approve	<p>Click this action button to approve the current record.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies, or follows a simple workflow.</p>
Reject	<p>Click this action button to reject the current record.</p> <p>Note: This action is shown only for users with the required permissions, and when the job uses approval hierarchies.</p>
Other Actions	<p>This drop-down list includes the following actions:</p> <ul style="list-style-type: none"> ▪ New User Role - Copy to come. ▪ Reset User Setup - Copy to come. ▪ Copy User Role - Copy to come.

Information Tab

This section describes the fields and actions on the Information tab of the Users workspace.

Tab Fields

Field	Description
Username	Copy to come.
Employee	Copy to come.

Field	Description
Company	Copy to come.
Type	Copy to come.
Period	Copy to come.
Password Expiry Date	Copy to come.
Template	Copy to come.
Administrator	Copy to come.
Password Blocked	Copy to come.
Transfer to People Planner	Copy to come.

User Role Information Tab

This section describes the fields and actions on the User Role Information tab of the Users workspace.

Tab Fields

Field	Description
Role Name	Copy to come.
Login Name	Copy to come.
Main Access Level	Copy to come.
Use for People Planner	Copy to come.
Default for Background Tasks	Copy to come.
Blocked in Touch	Copy to come.
Derived Company	Copy to come.

Field	Description
Overwrite Derived Company	Copy to come.
Network Username	Copy to come.
Network Domain Name	Copy to come.
Template Role Username	Copy to come.
Template Role Name	Copy to come.




Groups and Access Levels Tab




This section describes the fields and actions on the Groups and Access Levels tab of the Users workspace.

User Groups Table

Field	Description
Group Name	Copy to come.

User Groups Table Actions





Button	Description
+ Add Group	Copy to come.
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.
	Click this icon to export the rows from the current table to a spreadsheet. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.



Button	Description
	
	Click this icon to open the Customize Columns window.
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>Choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Group - Copy to come. ▪ Delete Group - Copy to come.

Access Levels Table

Field	Description
User Access Level	Copy to come.
Description	Copy to come.

User Groups Table Actions

Button	Description
+ Add Access Level	Copy to come.
↑ Move up	Click this action to move the current line above the previous line in the table.
↓ Move down	Click this action to move the current line below the next line in the table.
	Click this icon to refresh data in the current workspace. Maconomy exports the table, and immediately downloads the resulting spreadsheet to your local drive.
	Click this icon to display the filter row on the current table. You can then enter criteria in any of the filter row fields to display only select table rows.
 	Click this icon to maximize the table view. Click this icon to restore the default display size of the table.

Button	Description
	Click this icon to open the Customize Columns window.
	<p>The Row Tools icon allows you to add lines/information to the lines of a record.</p> <p>Choose from the following actions:</p> <ul style="list-style-type: none"> ▪ Insert Access Level - Copy to come. ▪ Delete Access Level - Copy to come.

Actions Tab

This section describes the fields and actions on Actions tab of the Users workspace.

Permitted Job/Cost Actions island

Field	Description
Job Budgets	<p>Copy to come.</p> <ul style="list-style-type: none"> ▪ Change ▪ Submit ▪ Approve ▪ Reopen
Draft Invoices	<p>Copy to come.</p> <ul style="list-style-type: none"> ▪ Submit ▪ Approve ▪ Reopen
Jobs	<p>Copy to come.</p> <ul style="list-style-type: none"> ▪ Change Job Number ▪ Submit ▪ Approve ▪ Reopen ▪ Convert Job to Order ▪ Transfer to Quote
Job Quotes	<p>Copy to come.</p> <ul style="list-style-type: none"> ▪ Change

Field	Description
	<ul style="list-style-type: none"> Submit Approve Reopen
Planning	Copy to come. <ul style="list-style-type: none"> See All Employee Plans Plan All Jobs See All Absences
Time Cost	Copy to come. <ul style="list-style-type: none"> See Time Cost Change Costs for Time
Time Sheets	Copy to come. <ul style="list-style-type: none"> See All Change Transfer Reopen
Tasks	Copy to come. <ul style="list-style-type: none"> Change Amount Activity Tasks Change Time Activity Tasks Can Approve Tasks
Absence	Copy to come. <ul style="list-style-type: none"> Submit All Approve and Reject All Reopen
Expense Sheets	Copy to come. <ul style="list-style-type: none"> See All Change Transfer Reopen
Miscellaneous	Copy to come. <ul style="list-style-type: none"> Print Invoices/Credit Memos

Field	Description
	<ul style="list-style-type: none"> Approve Job Invoice Allocations Approve Employee Revenue Distributions

Permitted Finance Actions island

Field	Description
Customers	Copy to come. <ul style="list-style-type: none"> Release Payments Submit Approve
Vendors	Copy to come. <ul style="list-style-type: none"> Submit Approve
Purchase Orders	Copy to come. <ul style="list-style-type: none"> Submit Approve Reopen
Quotes	Copy to come. <ul style="list-style-type: none"> Reopen Request Approve Request
Vendor Invoices	Copy to come. <ul style="list-style-type: none"> Submit Approve Pre Post
Requisitions	Copy to come. <ul style="list-style-type: none"> Approve Reopen
Journals	Copy to come. <ul style="list-style-type: none"> Use Post-Entry Periods Post Submit Journals

Field	Description
	<ul style="list-style-type: none"> Submit General Journals Post Own Journals Approve General Journals Approve

Permitted Misc. Actions island

Field	Description
Trade	Copy to come. <ul style="list-style-type: none"> Change Prices Print Picking and Packing Lists Approve Item Purchase Orders Approve Sales Orders Print Packing Slips Print Item Purchase Orders Print Order Confirmations Change Orders being picked and packed Close Item Purchase Orders
Human Resouces	Copy to come. <ul style="list-style-type: none"> Create Employees from Contact Persons Submit Employees Approve Employees See HR Information for Subordinates See HR Information for Mentees See HR Information as Secretary See HR Information for all Employees
Misc.	Copy to come. <ul style="list-style-type: none"> Submit Users Approve Users Delete Closed Document Revisions Unconditionally Unlock Documents Change Shared Selection Criterion Specifications

Field	Description
Integration	Copy to come. <ul style="list-style-type: none"> Synchronize Talent-Management Users with Employees Export Employees to TrafficLIVE Export Customers to TrafficLIVE Export Jobs to TrafficLIVE
Data Import Package	Copy to come. <ul style="list-style-type: none"> Import Packages Make Package Deletable Change Import Users Change Responsible Users View Sensitive Attachments

Tab Fields

Field	Description
Company No.	Copy to come.
User Action Group	Copy to come.
Use Post-Entry Periods	Copy to come.
Submit Journals	Copy to come.
Post Own Journals	Copy to come.
Post	Copy to come.
Release Customer Payments	Copy to come.
Submit Customers	Copy to come.
Approve Customers	Copy to come.
Submit Purchase Orders	Copy to come.

Field	Description
Approve Purchase Order	Copy to come.
Reopen Purchase Order	Copy to come.
Approve Request for Quote	Copy to come.
Reopen Request for Quote	Copy to come.
Approve Requisition	Copy to come.
Reopen Requisition	Copy to come.
Submit Vendor Invoices	Copy to come.
Approve Vendor Invoices	Copy to come.
Pre Post Vendor Invoices	Copy to come.
Submit Vendors	Copy to come.
Approve Vendors	Copy to come.
Submit Employees	Copy to come.
Approve Employees	Copy to come.
Submit Users	Copy to come.
Approve Users	Copy to come.
Submit Jobs	Copy to come.
Approve Jobs	Copy to come.
Submit Draft Invoice	Copy to come.
Approve Draft Invoice	Copy to come.

Field	Description
Submit Job Budgets	Copy to come.
Approve Job Budgets	Copy to come.
Submit Job Quotes	Copy to come.
Approve Job Quotes	Copy to come.
Submit General Journals	Copy to come.
Approve General Journals	Copy to come.

Users Procedures

Copy to come.

Reporting

This section of the help covers the BI Launch Pad workspace as well as all the reporting workspaces found under submenus in the various areas of Maconomy.

BI Launch Pad

Use this workspace to open BI Launch Pad in a separate browser tab.

Reports

This section covers the report workspaces found under the Reports submenu, which in turn falls under the Jobs submenu.

WIP Aging Report

Use this workspace to generate the WIP Aging report for the job you specify using the search filter and **Search** field. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Reports submenu (**Jobs » Jobs » Reports**).

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Profitability Budget Report

Use this workspace to generate the Job Profitability Budget report for the job you specify using the search filter and **Search** field. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Reports submenu (**Jobs » Jobs » Reports**).

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

A/R Transactions (Job) Report

Use this workspace to generate the AR Transactions report for the job you specify using the search filter and **Search** field. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Reports submenu (**Jobs » Jobs » Reports**).

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Reports

This section covers the report workspaces found under the Job Reports submenu.

Job Profitability Summary Report

Use this workspace to generate the Job Profitability Summary report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Profitability Budget Report

Use this workspace to generate the Job Profitability Budget report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Profitability Budget, by Task Report

Use this workspace to generate the Job Profitability Budget, by Task report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Profitability Comparison Report

Use this workspace to generate the Job Profitability Comparison report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Profitability Periodic Report

Use this workspace to generate the Job Profitability Periodic report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Profitability Transactions Report

Use this workspace to generate the Job Profitability Transactions report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Budget to Actuals YTD Report

Use this workspace to generate the Job Budget to Actuals YTD report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Budget to Actuals, by Task Report

Use this workspace to generate the Job Budget to Actuals, by Task report.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Status, by Task & Employee Report

Use this workspace to generate the Job Status, by Task & Employee report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

WIP Aging Report

Use this workspace to generate the WIP Aging report. For more information about this report, refer to the *Deltak Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Revenue Analysis Report

Use this workspace to generate the Revenue Analysis report. For more information about this report, refer to the *Deltak Maconomy BPM Report Description Guide*.

This workspace is listed under the Job Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Customer Reports

This section covers the report workspaces found under the Customer Reports submenu.

A/R Aging (Customer) Report

Use this workspace to generate the AR Aging report. For more information about this report, refer to the *Deltak Maconomy BPM Report Description Guide*.

This workspace is listed under the Customer Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

A/R Transactions (Customer) Report

Use this workspace to generate the AR Transactions report. For more information about this report, refer to the *Deltak Maconomy BPM Report Description Guide*.

This workspace is listed under the Customer Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Customer Invoices Report

Use this workspace to generate the Customer Invoices report. For more information about this report, refer to the *Deltak Maconomy BPM Report Description Guide*.

This workspace is listed under the Customer Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Customer Profitability Report

Use this workspace to generate the Customer Profitability report. For more information about this report, refer to the *Deltak Maconomy BPM Report Description Guide*.

This workspace is listed under the Customer Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Customer Statement Report

Use this workspace to generate the Customer Statement report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Customer Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

WIP Aging by Dimension Report

Use this workspace to generate the WIP Aging, by Dimension report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Customer Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Employee Reports

This section covers the report workspaces found under the Employee Reports submenu.

Employee Time Overview Report

Use this workspace to generate the Employee Time Overview report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Employee Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Utilization Report

Use this workspace to generate the Utilization report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Employee Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Realization Report

Use this workspace to generate the Realization report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Employee Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Management Reports

This section covers the report workspaces found under the Management Reports submenu.

Utilization, by Employee Report

Use this workspace to generate the Utilization, by Employee report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Management Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Realization, by Employee Report

Use this workspace to generate the Realization, by Employee report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Management Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Realization, by Account Manager Report

Use this workspace to generate the Realization, by Account Manager report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Management Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Job Profitability Summary, by Job Report

Use this workspace to generate the Job Profitability Summary, by Job report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Management Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Customer Profitability, by Customer Report

Use this workspace to generate the Customer Profitability, by Customer report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Management Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Profit and Loss Report

Use this workspace to generate the Profit and Loss report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Management Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

Profit and Loss, by Dimension Report

Use this workspace to generate the Profit and Loss, by Dimension report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Management Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

A/R Aging (Management) Report

Use this workspace to generate the AR Aging report. For more information about this report, refer to the *Deltek Maconomy BPM Report Description Guide*.

This workspace is listed under the Management Reports submenu.

Generating a Report

When you click a report name in the menu, Maconomy opens the corresponding workspace and displays the report as an embedded web page.

Each report workspace also features a configurable link that you can click to run the report and open it in a separate browser tab.

Note that some links in BPM reports still link to workspaces in the Workspace Client.

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