

Deltek®

Maconomy Essentials

iAccess Customer Creation
Click Guide



Create a Customer

1

Step 1: Access the Customers workspace.

2

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

3

Step 3: Edit the customer information.

4

Step 4: Submit the Customer Information.

Deltek iAccess

Customers Active Customers 78 of 375+ New Customer

Danisco Seed 10075

Save Revert Submit Other Actions

Overview of click-guide procedure

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

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

Begin

Best viewed in IE or Adobe PDF Reader.

Create a Customer



Deltek iAccess

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- Invoices

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Customers Active Customers ▾ 78 of 375+ ▶

+ New Customer

Save **Revert** **Commit** **Other Actions** ▾ **Open**

Danisco Seed
10075

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

Address: 4960 Holeby Denmark

Bill to Customer: Danisco Seed 10075

Attn.: None

CRM Integration: None

Account Manager: None

Sales Person: None

▼ Details

Currency: DKK

Language: Danish

Customer Type: None

Customer Group: All

Sales Price List: Standard

Specification 1: Standard -

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

B Click + New Customer.

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Step 1 Access the Customers workspace.

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

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Step 4: Submit the Customer Information.

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Danisco S
10075

INFORMATION

Address: 4960 H
Denma

▼ Responsible

Our Contact: Nor

Employee 7: Nor

▼ Details

Currency: DKK

Customer Type: /

Create Customer

Customer

Name

Customer No.

Blank for Default

Address 1

Address 2

Address 3

Zip Code

Postal District

Country

Address 4

Attn.

Phone

E-mail

Parent Customer

Customer

Standard customer DK

Standard custo...

Linking Rule

Responsible Staff

Account Manager

Sales Person

The Create Customer wizard displays.

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+ New Customer

Save | Revert | Submit | Other Actions

Open

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OPEN ENTRY STATEMENT

Sales Person: None

Sales Price List: Standard

Specification 1: Standard -

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Address: 4960 Holeby
Denmark

▼ Responsible Staff

Our Contact: None

Employee 7: None

▼ Details

Currency: DKK

Customer Type: None

Create Customer

Customer

Name

Gabrielle Luke

Customer No.

Blank for Default

Address 1

Address 2

Address 3

Zip Code

Postal District

Country

Address 4

Attn.

49-521-99200

E-mail

Parent Customer

Customer

Danisco ingredients

10006

Linking Rule

Responsible Staff

Account Manager

James Grotto

2009

Sales Person

Employee 7

Create

78 of 375+

+ New Customer

Save

Revert

Submit

Other Actions

Open

Sales Person: None

Sales Price List: Standard

Specification 1: Standard

A

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

B

Fill out the other fields as needed.

C

Click **Create**.

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-0110003

Save Revert Submit Other Actions

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OPEN ENTRY STATEMENT

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

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

CRM Integration: None

▼ Responsible Staff

Our Contact: None

Account Manager: James Grotto 2009

Sales Person: None

Employee 7: None

▼ Details

Currency: DKK

Language: Danish

Sales Price List: Standard

Customer Type: None

Customer Group: All

Specification 1: Standard -

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

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Step 1: Access the Customers workspace.

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

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Step 3 Edit the customer information.

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Customers Active Customers 1 of 375+ + New Customer

Cloud Customer 01
-0110001

INFORMATION JOBS SUBSCRIPTION ORDERS INVOICES REMINDER LETTERS INTEREST CHARGE NOTICES

Address: Australia
michaelmorales@deltek.com

Bill to Customer: Cloud Customer 01 -0110001 CRM Integration: None

Attn.: None

Account Manager: None Sales Person: Cloud PM EN11111903

Details

Currency: DKK Language: Danish Sales Price List: Standard

Customer Type: None Customer Group: All Specification 1: IT/Telecommunications 16

Click the filter list.

Under the Customers menu section, click the Customers workspace.

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

Select the Customer record you want to update.

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Gabrielle Luke

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Save | Revert | Submit | Other Actions

Edit

Attach Documents

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

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

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

▼ Responsible Staff

Our Contact: None

Account Manager: James Grotto 2009

Sales Person: None

Employee 7: None

▼ Details

Currency: DKK

Language: Danish

Sales Price List: Standard

Customer Type: None

Customer Group: All

Specification 1: Standard -

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Step 1: Access the Customers workspace.

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

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Step 3 Edit the customer information.

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Gabrielle Luke

Cancel

Save

Open

-0110003

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OPEN ENTRY STATEMEN ▶

E

Go to the Information tab.

Address

Name 2

Name 3

Name 4

8220

Brabrand

Denmark

Name 5

Attn.

Attn.

Phone

49-521-99200

E-mail

CRM Integration

▼ Responsible Staff

Our Contact

Account Manager

Sales Person

Employee 7

James Grotto

2009

▼ Details

Currency

DKK

Language

Danish

Sales Price List

Stand...

Customer Type

Customer Group

All

Specification 1

Standard

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Step 4: Submit the Customer Information.

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Name 3

Name 4

8220

Brabrand

Denmark

Name 5

Attn.

Attn.

Phone

49-521-99200

E-mail

Bill To Customer

Gabrielle Luke

-0110...

CRM Integration

Attn.

Responsible Staff

Our Contact

2016

Art Rivers

2020

Laurie Forbes

2026

Fay Miller

2040

Ben Hunter

2071

Account Manager

James Grotto

2009

Sales Person

Language

Danish

Customer Group

All

Sales Price List

Stand...

Specification 1

Standard

Cancel

Save

Click Save.

F

Edit the fields as needed.

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Step 3 Edit the customer information.

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Step 4: Submit the Customer Information.

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OPEN ENTRY STATEMENT

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

Bill to Customer: Gabrielle Luke -0110003

CRM Integration: None

Attn.: None

▼ Responsible Staff

Our Contact: Art Rivers 2016

Account Manager: James Grotto 2009

Sales Person: None

Employee 7: None

▼ Details

Currency: DKK

Language: Danish

Sales Price List: Standard

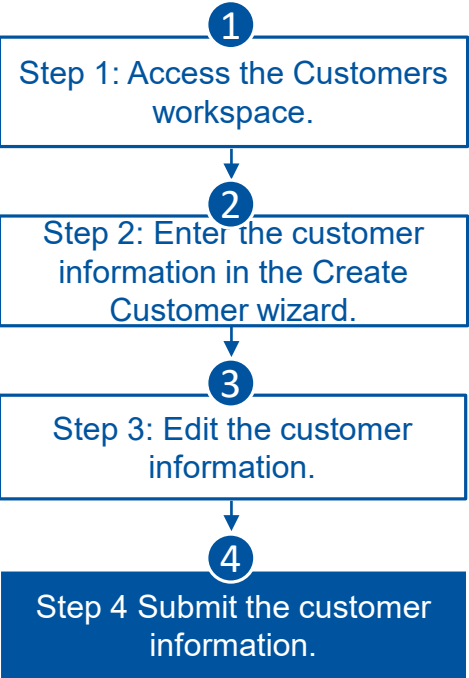
Customer Type: None

Customer Group: All

Specification 1: Standard -

iAccess saves your changes,
and refreshes the browser
window.

Create a Customer



Deltek iAccess

Customers Active Customers 3 of 25+ + New Customer

Save Revert **Submit** Other Actions

Gabrielle Luke -0110003

B Open the customer record you created or edited.

C Click **Submit**.

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

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- Approval Center
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Information

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

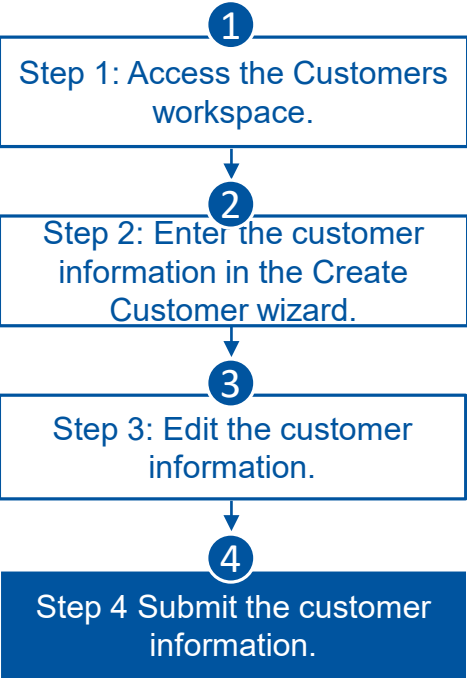
Responsible Staff

Our Contact: Art Rivers 2016
Employee 7: None
Account Manager: James Grotto 2009
Sales Person: None

Details

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

Create a Customer



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-0110003

Submitted

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OPEN ENTRY STATEMENT

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

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

CRM Integration: None

▼ Responsible Staff

Our Contact: Art Rivers 2016

Account Manager: James Grotto 2009

Sales Person: Michiko Dy 1840008

Employee 7: None

▼ Details

Currency: DKK

Language: Danish

Sales Price List: Standard

Customer Type: None

Customer Group: All

Specification 1: Standard -

iAccess saves your changes,
and refreshes the browser
window.

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

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Step 1: Access the Customers workspace.

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Save Revert Submit Other Actions

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OPEN ENTRY STATEMENT

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

Bill to Customer: Gabrielle Luke -0110003

CRM Integration: None

Attch: None

▼ Responsible Staff

Our Contacts: Art Rivers 2016

Account Manager: James Gentry 2000

Sales Person: Nicholas By 1840008

Employee To: None

▼ Details

Currency: DKK

Customer Type: None

This concludes the
iAccess Customer Creation click-guide.