



Finance

Instructions for Merlin Project

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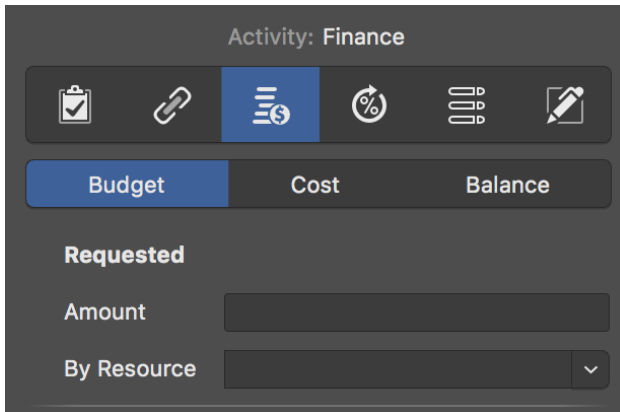
Finance - Status June 2018

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Finance

Merlin Project] provides options for the **finances** in the project. Each **transaction**, **milestone**, **resource**, **appendix** or **allocation** can be assigned a **budget** and **costs**.

The easiest way is to use the **Finance** register in the Inspector.



There you will find three more registers:

- **Budget**
- **Costs**
- **Balance**







Budget



Budget means **money** available for the **project**.

Select a **transaction**, **milestone** or **assignment** and then click on the **Finance** → **Budget** tab in the Inspector. Here you can enter all budget information in the available fields.

Activity: Finance

Budget
Cost
Balance

Requested

Amount

By Resource ▼

Approved

Amount

By Resource ▼

▶ **Status** ⌵

Results

Approved	0,00 €
Distributed	0,00 €
Undistributed	0,00 €

Notes



If you have no budget and want to see the **costs** for the project, use the tab **Finance** → **Costs**

Costs

In the tab **Finance** > **Costs** you can enter base costs for the selection.



basic costs are **all costs** that arise during **planning** and **execution** of the project.

Activity: Finance

Clipboard, Link, **Cost**, Refresh, List, Edit

Budget | **Cost** | Balance

▼ **Base Costs** 0,00 €

Intended Purpose

Accrual: Accrue prorated

Title ▲	Planned Amount	Actual Amount
New Cost		

+ -

Billable

Type

Account

Status

Added by

If you have several **cost positions**, create new entries one after the other with a mouse click on the **+**. Merlin Project adds the individual cost positions automatically. In the field **Base Costs** all cost items are listed as **Total**.

Balance

In the tab **Finance** → **Balance** you will find the **overview** of the individual **cost values** broken down by **expected, planned** and **actual**.

Activity: Finance

Clipboard, Link, **Finance**, Refresh, List, Edit

Budget Cost **Balance**

▼ **Expected Costs**

Budget	0,00 €
- Base Costs	0,00 €
- Work Costs	0,00 €
- Attachment Cost	0,00 €
= Balance	0,00 €

▼ **Planned Costs**

Budget	0,00 €
- Base Costs	0,00 €
- Work Costs	0,00 €
- Attachment Cost	0,00 €
= Balance	0,00 €

▼ **Actual Costs**

Budget	0,00 €
- Base Costs	0,00 €
- Work Costs	0,00 €
- Attachment Cost	0,00 €
= Balance	0,00 €



Select the **project** in the **line #0** and switch to **finances** → **balance** in the inspector. You receive the **complete list** of all **cost items** contained in the project.

Cost views

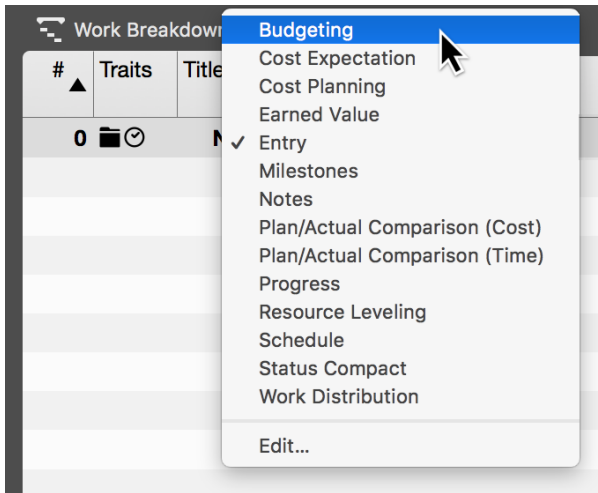


These functions can only be found in [Merlin Project](#).

In the views of Merlin Project you will find a preselection of different **cost views**:

- **Budgeting**

- Expected costs
- Cost planning
- Target/actual comparison (costs)



These **views** contain **columns** that give you an overview of the **costs** for each **group**, **transactions**, **milestones** and **assignments**.



Switch to one of the many **cost views** to quickly access **budget information** in the project.