**(Your Organization Approver) FMX Administrator Schedule Request Guide**

Login to FMX

**Step 1:** Open an internet browser and navigate to (yourfmxsite.gofmx.com).

**Step 2:** Log in with the following credentials:

* Email
* Password

Create a Request (Shortcut)

**Step 1:** Click **New request** in the right top corner of the calendar page.



**Step 2:** Choose the request type you would like to submit from the drop down list (see picture below).

Create a Schedule Request

**Step 1:** Click **Schedule Requests** in the left sidebar, then click **New request.**

**Step 2:** Enter the required fields (marked with an asterisk) and click **Submit** to submit the schedule request (see picture below).



**Step 3:** Check your email for your request confirmation and a link to check the status of your request. New requests will have a “Pending” status until they have been approved.

Edit a Schedule Request

**Step 1:** Find the schedule request you wish to edit (on the calendar or in the schedule requests grid), then click the **Edit** icon(from the grid) or click **on the request** and then the **Edit** button:

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**Step 2:** After making the necessary editing changes click **Save.**

Respond to a Schedule Request

**Step 1:** Find the schedule request you wish to respond to (on the calendar or in the schedule requests grid), then click **Respond.**

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**Step 2:** Enter a response (see picture below).



**Step 3:** Click **Respond** to send your response. This will generate an email notification to all users involved with the request.

Approve a Schedule Request

**Step 1:** Find the schedule request you wish to approve (on the calendar or in the schedule requests grid), then click **Approve** (see picture below).



**Step 2:** Click **Approve** again to finalize the approval.



Decline a Schedule Request

**Step 1:** Find the schedule request you wish to approve (on the calendar or in the schedule requests grid), then click **Decline** (see picture below).



**Step 2:** Enter a reason for declining and click **Decline** again to finalize the declination.



Estimate a Schedule Request (Skip this portion if you are not responsible for estimating)

**Step 1:** Find the schedule request you wish to estimate (on the calendar or in the schedule requests grid), then click **Estimate.**

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**Step 2:** Enter the amount of the estimate along with a description of what the estimate includes. New lines can be added by clicking the green “+” arrow.



**Step 3:** Click **Estimate** to save your estimate. Click **Estimate &** Email to save your estimate and email a PDF format to the requester. Click **Waive** to skip this process. If the “Acceptance” checkbox is selected, this will generate an email notification to the requesting user asking them to confirm the estimate.

Invoice a Schedule Request (Skip this portion if you are not responsible for invoicing)

**Step 1:** Find the schedule request you wish to invoice (on the calendar or in the schedule requests grid), then click**Invoice**. (Please note that the invoice action only appears once a request has been estimated and the estimate has been accepted by the requesting user.)

**Step 2:** Enter the invoice amount along with a description of what the final invoice includes. Click **Invoice** to send your invoice.

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Apply a Payment to a Schedule Request (Skip this portion if you are not responsible for payments)

**Step 1:** Find the schedule request you wish to apply payment to (on the calendar or in the schedule requests grid), then click **Apply Payment.**(Please note that the apply payment action only appears once a request has been invoiced.)

**Step 2:** Enter the payment amount, or click the checkbox for “Remaining balance amount”, and click apply payment.



**Step 3:** To apply additional payments follow steps 1 and 2. Once a request is paid in full it will be flagged as finalized and payments can no longer be added.

**Filter in Calendar View**

**Step 1:** Click the Filter button above the calendar view and select the filter you would like:



**NOTE:** You may choose more than one filter at a time

**Remove Filters**

If you're having trouble locating certain requests, events, or other information on your FMX calendar or in your FMX grids it could be because you have a filter selected that is hiding the information you're looking for.

You can see the filters that have been applied by looking underneath the Filter and Search bar:



**Remove All Filters**

To quickly remove all of the filters that are currently selected, click on the "x" attached to the filter button:

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Another way to remove filters is to click on the "Filter" button and choose "Clear Filter" at the bottom of the page:

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**Remove a Single Filter**

To remove filters one at a time, click on the "x" button next to the filter(s) you would like to remove:

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**Save Filters**

To save your current filters for future use, click the button at the bottom that says "Save Filter":

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Then type in the name of this saved filter. Once done, click the checkmark to save:

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