Getting Started with Financial

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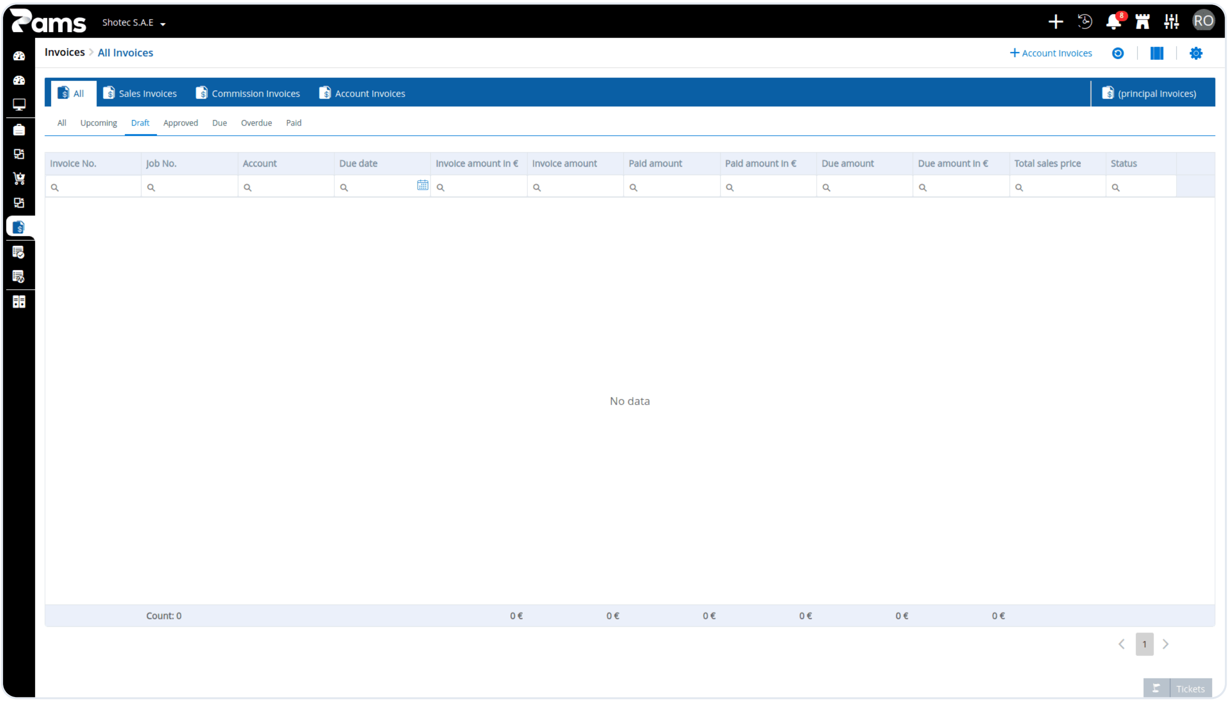
User Guide › Financial



Finance record

Use Financial to locate and open invoice and related finance records.

What You Can Do

- Use **Account Invoices** to access account invoice records.
- Use **Sales Invoices** to access sales invoice records.
- Use **Commission Invoices** to access commission invoice records.
- Use **All** to view all available finance records.
- Use **Upcoming** to view items scheduled for a future date or action.
- Use **Search box** to find a finance record.
- Use **Select** to open a chosen record.

- Use **edit** to update a finance record.

First Session: Find and Open a Finance Record

1. Open the Financial area and select **All** to display finance records.
2. Enter a relevant reference, name, or other known value in the **Search box**.
3. Select the required record from the results.
4. Select **Select** to open the Finance record.

Result

The selected Finance record opens and is ready for review or editing.

Next Steps

- Select **Account Invoices, Sales Invoices**, or **Commission Invoices** to work with the required invoice category.
- Select **Upcoming** to review finance items requiring future action.
- Use **edit** when you need to update an open Finance record.

Related pages

- Financial — Overview
- Payments
- Financial — Learning Path
- Bank Guarantees
- Receivables
- Invoice
- Account Invoice
- Letters Of Guaranties
- Principal Invoices