



FINANCIAL

Getting Started with Financial

User Guide > Financial

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Finance record

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

1 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.

2 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.

3 Result

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

4 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.

5 Related pages

- [Financial — Overview](#)
- [Payments](#)
- [Financial — Learning Path](#)
- [Bank Guaranties](#)
- [Receivables](#)
- [Invoice](#)
- [Account Invoice](#)
- [Letters Of Guaranties](#)
- [Principal Invoices](#)