Financial — Overview

September 12, 2026

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User Guide › Financial

Financial Overview

The Financial area provides a consolidated view of finance records used to monitor customer invoicing, commissions, payment-related items, and company financial obligations. It supports Finance officers and managers in reviewing records throughout their financial lifecycle, including Upcoming and Due items.

Sales representatives and Sales managers can use this area to review invoice-related records connected to sales activity. Purchasing officers, Warehouse managers, and Project managers may use the available financial information to follow items that affect procurement, delivery, and job profitability.

Key records include sales invoices, commission invoices, principal invoices, tickets, company L/Gs, and payables. Records can be reviewed across all available finance items or filtered by their type and status.

What you can do here

- Open **Account Invoices** to review account invoice records.
- Use **All** to view the complete set of available finance records.
- Open **Sales Invoices** to review invoices issued for sales activity.
- Open **Commission Invoices** to review commission-related invoice records.
- Open **(principal Invoices)** to review principal invoice records.
- Select **Upcoming** to focus on finance items scheduled for future action.
- Open **Tickets** or **Company L/Gs** to review the corresponding financial records.
- Use the **Search box** to locate finance records, **Select** to choose a record, and **edit** to update it.

Related pages

- Getting Started with Financial
- Bank Guaranties
- Financial — Learning Path
- Payments
- Receivables
- Invoice
- Account Invoice
- Letters Of Guaranties
- Principal Invoices