Finance — Learning Path

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Learning Paths › Finance

This learning path is for Finance users who need to create, review, maintain, and follow up on invoice, payment, guarantee, and principal-invoice records. After completing it, learners will be able to use the available Finance screens to enter new finance documents, inspect existing records, make appropriate updates, and organize periodic review work.

Learning objectives

- By the end of this path you can create account and additional invoices using the appropriate new-invoice screen.
- By the end of this path you can locate invoices and open their Finance records for review.
- By the end of this path you can update invoice and payment records using their edit screens.
- By the end of this path you can create, review, and maintain letters of guarantee.
- By the end of this path you can review and maintain principal-invoice records.

Prerequisites

- Access to the Finance app.
- Permission to view and edit Finance records where updates are required.
- Permission to create invoices and letters of guarantee where creation is required.
- Familiarity with the business process used by your organization to determine whether an account invoice, additional invoice, payment, letter of guarantee, or principal invoice is needed.

Module 1: Create the right finance document

Goal: Build confidence in selecting the appropriate creation screen for a new finance need.

Lesson 1.1: Create an account invoice

When a finance need should be recorded as an account invoice, start a new invoice in the dedicated account-invoice workflow. Open Account Invoice, enter the information required by your organization, and save or complete the record according to the options available on the screen. Use this route specifically when the invoice belongs in the account-invoice process rather than the additional-invoice process.

Practice task: Open Account Invoice and create a practice account invoice using approved training data.

Lesson 1.2: Create an additional invoice

When the invoice belongs to the additional-invoice process, use the separate creation screen so the record begins in the correct workflow. Open **New additional invoice**, provide the required invoice information, and complete the new record using the actions available on the screen. Confirm you selected this screen because the scenario calls for an additional invoice, not merely because it is another way to enter an invoice.

Practice task: Open **New additional invoice** and create a practice additional invoice.

Lesson 1.3: Create a letter of guarantee

When a finance process requires a new letter of guarantee, create it from the dedicated guarantee screen rather than trying to represent it as an invoice or payment. Open Letters Of Guaranties, enter the required record details, and finish the creation process using the available screen controls. The resulting record can later be reviewed and edited through its Finance record screens.

Practice task: Open Letters Of Guaranties and create a practice letter-of-guarantee record.

Module 2: Review and maintain invoices

Goal: Find invoice records, inspect their details, and make controlled updates when business information changes.

Lesson 2.1: Find an invoice and review its Finance record

When you need to answer a question about an existing invoice, begin from the invoice list rather than creating a duplicate record. Open Invoice, locate the relevant invoice, and open its Invoice to review the information available for that record. Use the view record screen for investigation and verification before deciding whether a change is necessary.

Practice task: From Invoice, open an existing training invoice and review it in Invoice.

Lesson 2.2: Correct an invoice record

When review identifies information that must be updated, move from reviewing the record to editing it. First inspect the invoice in Invoice, then open Invoice and make only the approved correction. Review the updated record afterward to ensure the change was made to the intended invoice.

Practice task: Open a training invoice, make one approved update in Invoice, and review the record again.

Lesson 2.3: Distinguish invoice creation from invoice maintenance

Use a creation screen when there is no record yet, and use the invoice list and record screens when a record already exists. For a new account invoice, use Account Invoice; for a new additional invoice, use **New additional invoice**. For an existing invoice, use Invoice, then review or update its Finance record as needed.

Practice task: Given one new-invoice scenario and one correction scenario, identify the correct screen for each and open it.

Module 3: Manage payments and letters of guarantee

Goal: Perform day-to-day review and maintenance of payment and guarantee records.

Lesson 3.1: Review and update a payment record

When a payment requires follow-up or correction, begin with the payment area and edit only the record that needs attention. Open Payments, locate the applicable payment, and use Payments to update the record according to your organization's approved process. Return to the payment context to confirm you worked on the intended item.

Practice task: Open Payments, select a training payment, and make one approved update in Payments.

Lesson 3.2: Review a letter of guarantee before changing it

When someone asks about an existing letter of guarantee, inspect the record before making edits. Open Letters Of Guaranties to review the existing guarantee information. If a change is authorized, open Letters Of Guaranties, update the record, and review the result to confirm the record remains accurate.

Practice task: Review a training guarantee in Letters Of Guaranties, then make one approved update in Letters Of Guaranties.

Module 4: Perform periodic principal-invoice review

Goal: Use principal-invoice screens to support structured review and maintenance work.

Lesson 4.1: Review principal invoices

When conducting a periodic review of principal invoices, start from the principal-invoice list so you can select the correct record for inspection. Open Principal Invoices, locate the record to review, and open Principal Invoices to examine its available details. Use this review step to determine whether the record requires an authorized update.

Practice task: From Principal Invoices, open a training record in Principal Invoices.

Lesson 4.2: Maintain a principal-invoice record

When a principal invoice needs an approved correction after review, use its dedicated edit record screen. Open the applicable principal invoice from Principal Invoices, review it in Principal Invoices, and then make the required update in Principal Invoices. Reopen or review the record after editing to verify that the correct principal invoice was maintained.

Practice task: Make one approved update to a training principal invoice in Principal Invoices.

Final assessment

1. A new finance request must be entered as an account invoice. Which screen should you use, and why?
2. You have been asked to check an existing invoice before deciding whether it needs correction. What sequence of screens should you use?

3. A payment record already exists, but authorized information on it must be updated. Where should you begin, and which record screen should you use for the update?
4. A letter of guarantee exists and a colleague asks you to verify its information before making any change. Which screen should you open first? If a correction is approved, what should you open next?
5. During a periodic review, you identify a principal invoice that needs an update. What is the correct review-and-maintenance sequence?

Answers

1. Use Account Invoice. It is the dedicated creation screen for a new account invoice.
2. Open Invoice, locate the invoice, and open Invoice; use Invoice only if a correction is required. This ensures you review the existing record before editing it.
3. Begin in Payments, locate the payment, and update it in Payments. The payment list helps you select the correct existing payment record.
4. Open Letters Of Guaranties first, then use Letters Of Guaranties if the change is approved. The view screen supports verification before maintenance.
5. Open Principal Invoices, review the item in Principal Invoices, then update it in Principal Invoices. This follows a locate, review, and edit sequence for the correct record.