Principals Invoice — Learning Path

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Learning Paths › Principals Invoice

This learning path is for users who need to work with principal invoice records in the Principals Invoice app. You will learn how to enter the app, locate the invoice record you need, open its detailed view, and use the available invoice information to support routine review and follow-up work.

Learning objectives

- By the end of this path you can access the Principals Invoice workspace and orient yourself to its available invoice records.
- By the end of this path you can identify an invoice record to review in the main Principals Invoice screen.
- By the end of this path you can open an invoice record in its detailed view.
- By the end of this path you can use the invoice view to investigate a record before taking follow-up action outside the app.
- By the end of this path you can apply a consistent review process when working through principal invoices.

Prerequisites

- Access to the Principals Invoice app.
- Permission to view principal invoice records.
- Familiarity with your organization’s principal invoice review and follow-up processes.

Module 1: Get oriented in Principals Invoice

Goal: Learn where principal invoice records are available and how to begin a review.

Lesson 1.1: Open the principal invoice workspace

When you need to begin invoice-related work, first open the central workspace where principal invoice records are available. Go to Principals Invoice and review the records presented in the screen before selecting an invoice to investigate.

Practice task: Open Principals Invoice and identify one invoice record you would review.

Lesson 1.2: Choose the right invoice for review

A request from a colleague or a routine review process may require you to investigate one specific invoice. In Principals Invoice, locate the relevant invoice record based on the information available to you, then prepare to open that record for more detail.

Practice task: From Principals Invoice, select an invoice record that you want to inspect further.

Module 2: Review an individual invoice

Goal: Open invoice details and use the record view to understand the invoice in context.

Lesson 2.1: Open an invoice record

After identifying an invoice in the workspace, you need to move from the overview to the individual record. Start in Principals Invoice, select the invoice you need, and open Principals Invoice to review that invoice's available details.

Practice task: Open one record from Principals Invoice in Principals Invoice.

Lesson 2.2: Investigate a question about an invoice

When someone asks you to verify or clarify an invoice, use the record view rather than relying only on the workspace overview. Open the relevant record in Principals Invoice, review the information displayed for that invoice, and use it to determine what follow-up is needed under your organization's process.

Practice task: Choose an invoice and review it in Principals Invoice as though responding to a review request.

Module 3: Apply a repeatable invoice review workflow

Goal: Work efficiently through invoice review tasks from selection through follow-up.

Lesson 3.1: Triage invoices from the workspace

During routine work, begin with the invoice workspace so you can decide which record requires attention first. Use Principals Invoice to identify a record for review, then open only the record that is relevant to the current task.

Practice task: Use Principals Invoice to choose one invoice for review and open its detailed record.

Lesson 3.2: Complete a review before escalating or following up

Before you send a question, escalate an issue, or complete an external follow-up, verify the invoice information available in the app. Start from Principals Invoice, open the selected record in Principals Invoice, and review the displayed details so your next action is based on the correct invoice.

Practice task: Review an invoice in Principals Invoice and describe the follow-up you would take according to your team’s process.

Final assessment

1. You receive a request to review a principal invoice, but you have not yet opened the app. Which screen should you use first, and why?
2. You can see an invoice record in the main workspace and need more information before responding to a colleague. What should you do next?
3. A colleague asks you to confirm details for a specific invoice. How should you move from identifying the record to reviewing its details?
4. You are reviewing several invoices and want to avoid investigating the wrong record. What workflow should you follow using the available screens?
5. Before escalating an invoice-related issue outside the app, what should you verify in the Principals Invoice app?

Answers

1. Open Principals Invoice; it is the workspace for locating the invoice record you need to review.
2. Open the selected record in Principals Invoice; this provides the individual invoice view for investigation.

3. Locate the relevant record in Principals Invoice, then open it in Principals Invoice; this ensures you review the intended invoice.
4. Identify the relevant invoice in Principals Invoice first, then open that selected record in Principals Invoice; this creates a consistent record-selection process.
5. Review the available information in Principals Invoice; this helps ensure any follow-up is based on the correct invoice record.