

CHAPTER 3: ORDER PROCESSING – PURCHASES, PAYABLES, AND GENERAL LEDGER

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Overview

This chapter covers the order processing functionality of Microsoft® Business Solutions–Navision®. In this chapter you learn more about the various steps of purchase order processing in Microsoft Navision. Through exercises you become more familiar with how this functionality is integrated into the program.

In the first section, Processing Overview, you learn about setting up Vendors and Items. You also learn about various costing methods within Microsoft Navision, such as FIFO and Last Direct Cost.

In the second section, Purchase Order Processing, you learn about:

- Creating a Purchase Order
- Creating a Purchase Invoice
- Using History to view Posted Documents

This section not only allows you to learn first hand the method of entering purchase documents in Microsoft Navision, but also lets you use the Microsoft Navision History functionality to view the results of your work.

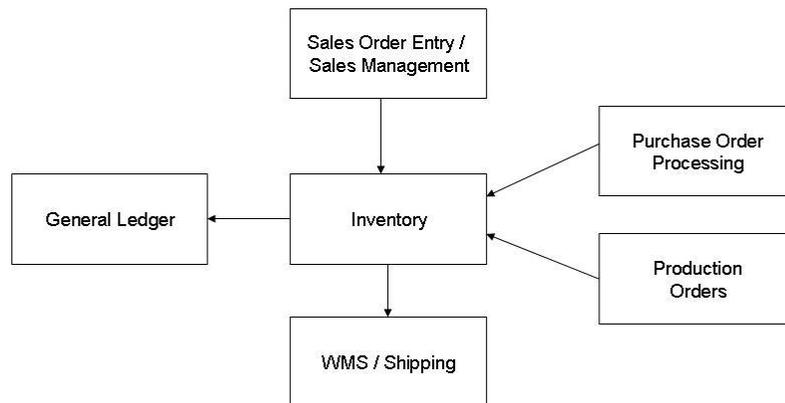
The third section, Payables Processing, we will take a look at the Accounts Payable report as well as the methods of performing payables transactions within Microsoft Navision. You get to use the various ways of paying an invoice within Microsoft Navision, as well as learn to print and post checks.

The final section, General Ledger Adjustments, leads you through the process of making correcting entries into a journal in Microsoft Navision. Afterwards, you will be taking a look at the results of your work using the Register.

Processing Overview

Integration

Before starting with processing, we need to discuss integration in Microsoft Navision.



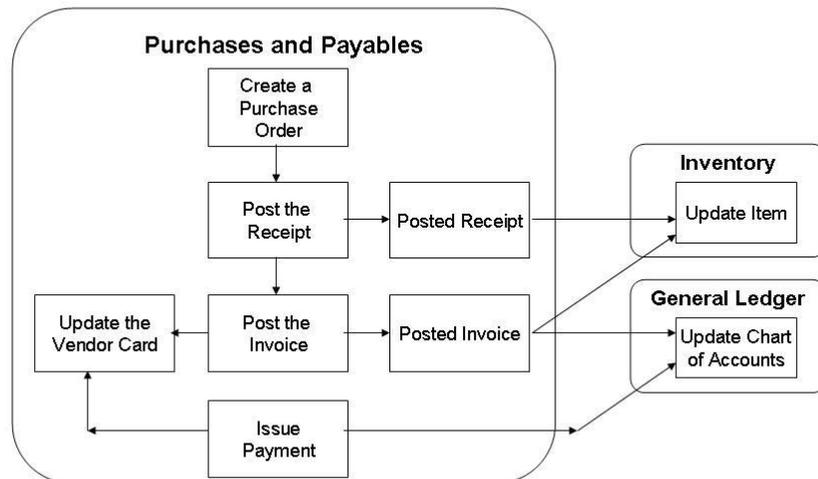
The above diagram is meant to portray some of the integration in Microsoft Navision. If you plan to use Inventory, many of the transactions that you post will “flow through” Inventory. The Purchase of Items results in an increase in the balance in Inventory, and updates General Ledger with the balance due to the Vendor and the increase in Inventory.

Processing a Sales Order similarly affects Inventory and General Ledger as will producing Inventory Items.

The General Ledger works as the data collection point for the entire system. Very little data flows back the other way. There are of course other interactions between the non-General Ledger modules, but for the time being if you can understand the above diagram it will go a long way to improving your understanding of the fundamental way Microsoft Navision operates.

Purchase, Payables, and General Ledger Processing

The following diagram is a visual representation of the process steps we perform in Purchases and Payables, and the impact that the processing has on other application areas.



Begin by creating a Vendor and Item. Then create a Purchase Order using the new Vendor and Item. After the Purchase Order is created, post a Receipt. This updates the Quantity on Hand (Inventory) in inventory for the Item. Next, Post an Invoice from the Order. This updates the Vendor card for the liability and update the Chart of Accounts as well.

The exact accounts updated in the Chart of Accounts depends upon the posting options selected in a company; any explanation beyond that is covered in later classes.

Finally, issue payment to the Vendor utilizing functionality in Microsoft Navision. Issuing Payment updates the Vendor's balance and the balance in the Chart of Accounts.

Now go to Microsoft Navision and create the Vendor, Item and then begin processing.

New Vendor and Item Setup

Scenario 1: As the Accounting Clerk at Cronus International, you are responsible for setting up new Items, Vendors and Customers. A new customer has asked for a special paint that you currently do not sell. In fact, you need to locate a vendor from whom you can purchase this particular color: Sunflower Yellow.

In this section you will create the new vendor and item and associate the item to the vendor. We will not be defining every field on the Vendor or Item cards, only those that are necessary for processing and posting Purchase, Payable and General Ledger entries. The new Customer will be setup in Chapter 4.

***NOTE:** You can always find more information about fields by using the f1 help or clicking the What's This? button and then clicking the field in question.*

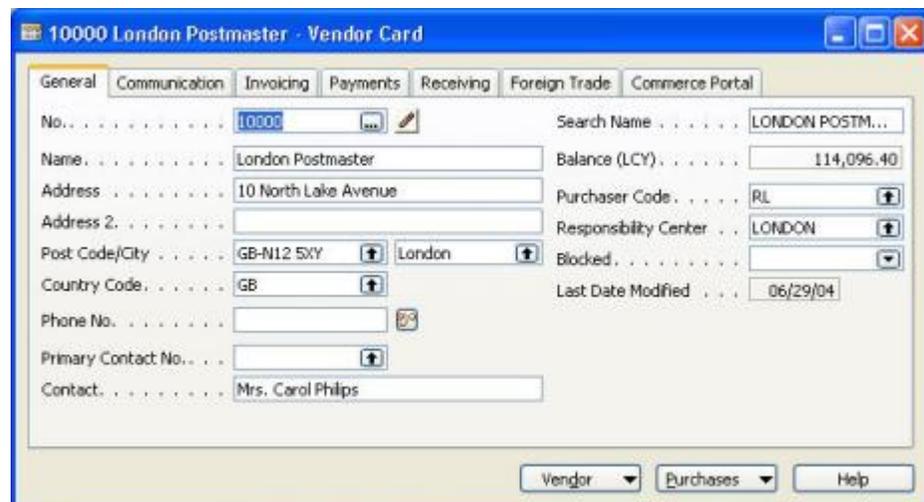
Change the Work Date

In this database, all postings must happen between November – February.

1. Click TOOLS→WORK DATE. The Work Date window appears.
2. Type 01/01/04.
3. Press ENTER or click **OK**.

Vendor Setup

On the Purchase menu, click ORDER PROCESSING→VENDORS. The Vendor Card window appears:



1. Press F3, or click the **Insert** button on the Toolbar, to insert a new Vendor Card.
2. In the **No.** field, press F6 or click the **AssistButton**. The No. Series window appears. No. Series are setup when new companies are created and used to allow for automatic or manual numbering. Multiple or single No. Series can be setup for each card. In the Item card setup, you will see a multiple No. Series setup.

In the No. Series window, notice that there is a Starting and Ending number. If you scroll to the right, you will see that both the **Default Nos.** and **Manual Nos.** check boxes are selected. This means that a user can either have a number created automatically (by pressing the ENTER key after inserting a new record) or manually (by typing it) in the **No.** field.

The number identifies the vendor and is used when you post from a journal or set up quotes, orders, invoices and credit memos.

You cannot fill in the other fields in the Vendor table until you have entered a number in the **No.** field. This is true of all cards (G/L Accounts, Customers, Items, Jobs, Orders, Invoices, Shipments, Contracts, etc.).

3. Press ESC to return to the Vendor Card and press the ENTER key to assign a number from the No. Series.

If using Manual Nos. you could enter an alphanumeric value.

***NOTE:** You do not need to open the No. Series window each time you create a new record. We only opened this window to explain the No. Series.*

4. In the **Name** field, type AR Day Property Management XYZ.
5. In the **Address** field, type 200 Bay Drive.
6. In the **Post Code** field, type GB-L18 6SA.
7. Notice that the **City** field is now populated with Liverpool. A **Post Code** and **City** combination has been setup which allows users to type in (or lookup and choose) either a **Post Code** or **City** which then will automatically populate the other respective field. If the Post Code and City table has not been setup, users will need to type in both the Post Code and City manually.
8. In the **Country** field, type in GB.
9. In the **Contact** field, enter Laura Owen.
10. Click on the **Invoicing** tab.

11. In the **Gen. Bus. Posting Group** field, lookup to the Gen. Business Posting Group window. Click on the record indicator on the line for NATIONAL and click **OK** and press ENTER.
12. The **VAT Bus. Posting Group** field should populate with NATIONAL. Do not change this as it has defaulted in from the Gen. Business Posting Group setup.
13. In the **Vendor Posting Group** field, press F6 and since DOMESTIC is selected in the list, press ENTER. Be sure to press ENTER again or tab off the field as leaving the field commits the data to the field.

***NOTE:** Always tab off a field or press ENTER after entering data into a field. This is how data is committed (saved) into the field.*

14. Click on the **Payments** tab.
15. In the **Application Method** field, leave the default of Manual. Here you can choose how the program will apply entries for this vendor. Manual means that the program will apply payments only if you specify a document. The other option, Apply to Oldest, means that if you do not specify a document for the payment to be applied to, the program will apply the payment to the oldest of the vendor's open entries.
16. In the **Payment Terms Code** field, lookup (F6 or click the **AssistButton**) and use the ARROW DOWN key to select 7 DAYS and press ENTER. The **Payment Terms Code**, combined with the **Document Date**, determines when the Vendor expects payment. When a Purchase Order or Invoice is created, this code, 7 DAYS, will default in and will calculate the **Due Date** seven days from the **Document Date** of the Order or Invoice.

The **Receiving** and **Foreign Trade** tab would be filled out if you have default Location, Shipping Method needs, or if this Vendor has a different currency or language than your company.

17. Close the **Vendor Card** window.

The Vendor card setup is complete for this scenario. Now create the Item card.

Item Setup

On the Purchase menu, click INVENTORY & COSTING→ITEMS. The Item Card window appears:



1. Press F3, or click the **Insert** button, to insert a new Item Card.
2. In the **No.** field, lookup to the No. Series window. Multiple No. Series have been setup for Item numbers. Since there are various types of Items that Cronus sells, they have chosen to set up multiple No. Series so that the same type of Items will be grouped together. Click on the second line, ITEM2, which is the "Paint" No. Series, and then click **OK**.

The **No.** field should now be populated with 70105, since that is the next number available in the "Paint" No. Series.

3. Press ENTER or TAB to go to the **Description** field. Type Paint, sunflower yellow.
4. In the **Base Unit of Measure** field, press F6 or click the **AssistButton**. The Item Units of Measure window appears.

We are now selecting the Base Unit of Measure for this item. If we wanted to sell this item at another unit of measure, for instance, by the case rather than the can, we could setup other units of measure in this window.

5. In the **Code** field, either press F6 or click the **AssistButton**. The Units of Measure window appears.
6. Click on the record indicator for CAN and then click **OK**.
7. The **Qty. per Unit of Measure** field populates with 1.
8. Click on the record indicator for CAN and then click **OK**.

9. The **Base Unit of Measure** field will now be populated with CAN.
10. In the **Shelf No.** field type B6. Here you can specify where to find the inventory item in the warehouse.
11. Click the **Invoicing** tab.
12. In the **Costing Method** field, leave FIFO. FIFO means First-in-First-out. With this method, the items that were purchased first are always sold first. The FIFO costing method values the inventory decrease by using the value of the first inventory increases on inventory.

Since the Costing Method determines how costs are calculated and how inventory is valued, please see the F1 help to find out more about the other options.
13. In the **Unit Cost** field, type 1.40. This field contains the most recent direct unit cost that was paid for the items.
14. In the **Last Direct Cost** field, type 1.40. This field contains the most recent direct unit cost that was paid for the items.
15. In the **Unit Price** field, type 2.70. This is the unit price of the item, in local currency (LCY).
16. Notice that the **Profit %** field is now populated. This field is automatically calculated based on the selection made in the **Price/Profit Calculation** field. The current selection Profit=Price-Cost calculates the **Profit %** based on the Unit Price – the Unit Cost.
17. In the **Gen. Prod. Posting Group** field, lookup (F6 or the **AssistButton**) to the Gen. Product Posting Group window and click on the record indicator for RETAIL. Click **OK** and press ENTER.
18. In the **VAT Prod. Posting Group** field should populate with VAT25. Do not change this as it has defaulted in from the Gen. Product Posting Group setup.
19. In the **Inventory Posting Group** field, press F6, click on the record indicator for RESALE, and click **OK**. Be sure to press ENTER again or tab off the field as leaving the field commits the data to the field.
20. Click on the **Replenishment** tab.
21. In the **Replenishment System** field, leave Purchase. Since we are purchasing this item and not producing (Prod. Order) it, we will leave it as Purchase.
22. In the **Vendor No.** field, press F6 to open the Vendor List and select the Vendor you created in the above section: AR Day Property Management XYZ. Press ENTER twice.
23. The other tabs are not necessary to fill out at this time. Close the Item Card window.

The Item card setup is complete for this scenario.

Test Your Skills – Creating an Item and Vendor

Scenario: As the Purchasing agent for Cronus International, Ltd. you are responsible for setting up new items as well as new vendors. A customer has requested two items of which one is not currently stocked by your company. You need to create a new item as well as a new vendor that will supply this new item.

Use the following to create the new item and vendor:

Item No.	80301
Description	USB Mouse
Unit of Measure	PCS
Costing Method	FIFO
Unit Cost	11.50
Last Direct Cost	11.50
Price/Profit Calculation	Profit=Price-Cost
Unit Price	14.375
General Product Posting Group	RETAIL
VAT Product Posting Group	VAT25
Inventory Posting Group	RESALE
Replenishment System	PURCHASE
Vendor No.	40101
Vendor Name	Lewis Home Furniture XYZ, LTD.
Address	89 Radcroft Road
Postal Code	GB-IB7 7VN
City	Gainsborough
Phone No.	23159799
Contact	Katie Jordan
General Business Posting Group	NATIONAL
VAT Business Posting Group	NATIONAL
Vendor Posting Group	DOMESTIC
Application Method	MANUAL
Payment Terms Code	1M(8D)
Payment Method Code	CHECK
Location Code	BLUE
Shipment Method Code	CIF (Cost, Insurance and Freight)

All Skill Levels

Your tasks are as follows:

1. Create an item and vendor using the information provided above.
2. View the newly created item and vendor cards.

Need a Little Help?

- Go to PURCHASE→INVENTORY & COSTING→ITEMS.
- Create a new item card.
- Use the above data to complete the item card.
- Go to PURCHASE→ORDER PROCESSING→VENDORS.
- Create a new vendor card.
- Use the above data to complete the vendor card.

Purchase Order Processing

Scenario 2: As the Accounting Clerk at Cronus International, you are also responsible for purchasing. The Customer has requested the Sunflower Yellow paint and you have received a phone call from the sales department asking if you could place the order for 100 cans of the paint. They also suggested you order 200 cans to keep in stock as this will be a return customer. There will be a backorder so a partial receipt will be necessary.

In this section you will create the purchase order for the Sunflower Yellow paint for Vendor AR Day Property Management XYZ. We will not be defining every field on the Purchase Order, only those that are necessary for processing and posting the Purchase Order.

Create a Purchase Order

On the Purchase menu, click ORDER PROCESSING→ORDERS. The Purchase Order window appears:

T.. No.	Description	Location	Quantity	Reserve	Unit of M.	Direct U..
1908-5	LONDON Kontorstol, blå	GREEN	20		PCS	822.774
1906-5	ATHEN Skuffemodul	GREEN	20		PCS	1,879.281
80100	Printerpapir	GREEN	200		PALLET	821.918

The Purchase Order contains a header section (top) and a line section (bottom).

1. With the cursor in the header, press F3 to insert a new Purchase Order.
2. Press ENTER to automatically assign a No.

3. In the **Buy-from Vendor No.** field, lookup (press F6 or click the **AssistButton**) to the Vendor List. Locate the Vendor you created in the previous section: No. V00010, AR Day Property Management XYZ and press ENTER twice.

Notice that some of the fields on the header are now populated with the information that you entered on the Vendor Card. The data in these fields can be changed here, such as changing the Buy-from Contact name if the person you spoke to when ordering this product was different than the contact on the Vendor Card. Making changes here do not affect the Vendor Card; these changes will remain with this particular order.

4. Make note of the **Document Date**. Click on the **Invoicing** tab and note the date in the **Due Date** field. Remember, the **Document Date** and the **Payment Terms Code** determine the Due Date. Since we setup this Vendor with seven day terms, the Due Date will be seven days after the Document Date. In this case, 01/08/04. Go back to the **General** tab.
5. Click in the lines section.

REMEMBER: *If you prefer to use the keyboard you can use the ARROW DOWN key to get down to the lines section of the Purchase Order. To get back to the header press CTRL + ARROW UP.*

6. The first field is the **Type** field. Press F6 to view the options list. Since we are purchasing an item, select Item from the list.
7. Tab or press ENTER to go to the **No.** field. Since Item was selected in the **Type** field, this field represents the Item No. Press F6 to lookup to the Item list. Locate the Item you created in the previous section: Paint, sunflower yellow. Press ENTER twice.
8. Notice that the **Description** field is now populated with Paint, sunflower yellow, which is the description from the Item card. The **Description** field can be modified.
9. In the **Location Code** field, press F6 to open the Location List window. Click on the line for BLUE and click **OK**. Press ENTER. The **Location Code** field contains the code for the location where the items on the line will be located.
10. In the **Quantity** field, type 200. This is the number of items you are ordering from this vendor.
11. Notice that the **Direct Unit Cost Excl. VAT** field has been populated with the Unit Cost amount from the Item card. Also notice that the **Line Amount Excl. VAT** field automatically calculated the Quantity * Direct Unit Cost Excl. VAT (200 * 1.40).

If you were to change the values in either the **Quantity** or **Direct Unit Cost Excl. VAT** fields, the **Line Amount Excl. VAT** field would recalculate automatically. If you were to change the **Line Amount Excl. VAT** field, the **Line Discount %** field would calculate a percentage based on this change.

12. Click ORDER→STATISTICS (F9). The Purchase Order Statistics window appears. You can use this window to get a quick overview of a purchase order. The window shows detailed information about the specific order and the quantities that will be invoiced and received.

The **General** tab displays information regarding the entire purchase order. The **Invoicing** tab displays information about the quantity of items to be invoiced. The **Shipping** tab displays information about the quantity of items to be received. The **Vendor** tab displays the Vendors current balance. Notice that right now all the tabs, other than the **Vendor** tab, display the same information. We will come back to this window shortly. Press ESC to go back to the order.

13. Go to the **Qty. to Receive** field in the lines. The field has been updated with the Quantity value. Change this value to 75. Note that the **Qty. to Invoice** field is updated to 75 as well. Clear the **Qty. to Invoice** field. We are going to do a partial receipt first.

The **Qty. to Receive** and **Qty. to Invoice** fields are used in the receiving and invoicing process. If part of your paint order was backordered but you received the available shipment, you could enter the amount received in the **Qty. to Receive** field and then post the receipt to adjust inventory.

The **Qty. to Invoice** field is used to determine how much of the line should be invoiced. This field is used only when you post orders. Each time the **Quantity** field is updated and you post an order, the program will automatically suggest invoicing the quantity that has not yet been invoiced. Generally, an order is invoiced when you receive the invoice from the Vendor. At that time, the amount to invoice would be entered into the **Qty. to Invoice** field and then posted. Once the order is posted, a Posted Purchase Invoice is created, which also creates a payable in the general ledger.

NOTE: *It is never possible to invoice more than you have received.*

These two processes can be done simultaneously by entering the received amount in both the **Qty. to Receive** and **Qty. to Invoice** fields.

- Click F9 to open the Purchase Order Statistics window. The **General** tab still displays the total amounts of the order. Now click on the **Invoicing** tab and note that there are no values displayed. This is because you cleared the **Qty. to Invoice** field on the order. Click on the **Shipping** tab and note that the partial receipt amounts are displayed. Press ESC to go back to the order.
- Click POSTING→POST (F11). The following window appears:



- The default is Receive and Invoice but since we are only receiving this, click **Receive** and then click **OK**.

The **Qty. to Receive** field is now populated with 125, the **Qty. Received** field is populated with 75, and the **Qty. to Invoice** field is populated with 200. Since we posted a partial receipt of 75, the **Qty. Received** field displays the amount of the posted receipt: the quantity received into inventory. We still have 125 more to receive so the **Qty. to Receive** field displays that amount: the quantity still to receive. And we have not invoiced this product yet so the **Qty. to Invoice** displays the total quantity of the order that has not been invoiced, which is 200.

At this point, if you wanted to post an invoice for the partial receipt, you could clear the **Qty. to Receive** field and change the **Qty. to Invoice** to 75 and then post the invoice.

Scenario 3: Some time has passed and the backordered items have been shipped to your BLUE location. You now need to receive these items and invoice the entire purchase order.

- But first, click F9 to open the Purchase Order Statistics window. The **General** tab still displays the total amounts of the order. Now click on the **Invoicing** tab and note that the values match the **General** tab since you are invoicing the entire order. Click on the **Shipping** tab and note that the partial receipt values are displayed. Press ESC to go back to the order.
- In the header, go to the **Posting Date** field and change the date to 01/05/04. Since you are receiving and invoicing on a different date, you need to make the **Posting Date** be the date we receive and invoice the items.

You may notice that the Document Date also changed. Remember that the Document Date partially determines the due date. Generally the Document Date should be the same as the date on the vendors invoice. Do not change the date for this scenario, but note that the Due Date is now 01/12/04.

3. In the **Vendor Invoice No.** field, type 9467725. This is the vendors invoice number, typically found on the invoice they send you. A Purchase Order cannot be posted without a Vendor Invoice No.
4. Click POSTING→POST (F11). The Posting window appears. **Receive and Invoice** is the default. Click **OK**.

The order is fully received and invoiced. You may notice that the Order disappeared and you are now looking at a different order. This happens because when you have completely received and invoiced an order in Microsoft Navision, it becomes a posted document. The posted invoices can be located on the Purchase menu by clicking HISTORY→POSTED INVOICES.

When the Posted Purchase Invoice window is opened, press F5, or click the **List** button, to display all the Posted Invoices. Generally, the last invoice posted is at the bottom of the list, unless multiple number series are used for invoices. In this case, scroll to the bottom of the list (CTRL + PAGE DOWN). When you locate the invoice, click on the line and press ENTER or click **OK**.

Posted Documents are not editable, but you can print them numerous times.

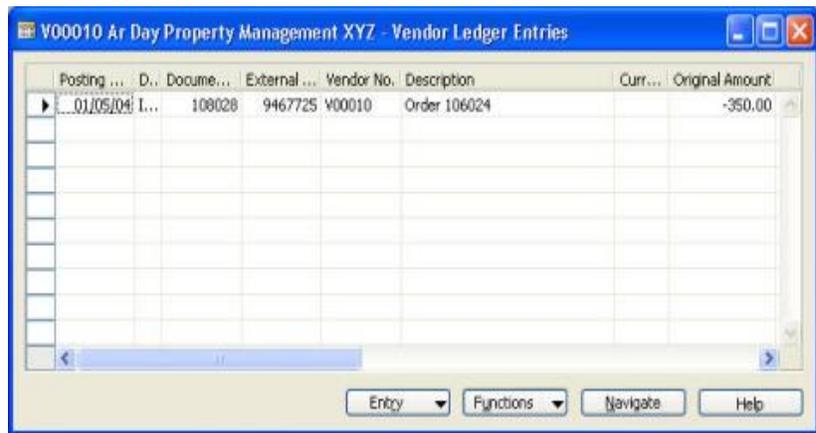
Close the Posted Purchase Invoice and Purchase Order windows.

Vendor Ledger Entries

Go to the Vendor card to view the entries made.

1. Click ORDER PROCESSING→VENDORS. The Vendor Card window appears.
2. Press F5 or click the **List** button to display the Vendor List. Locate Vendor V00010 AR Day Property Management XYZ and click the line and press ENTER or click **OK**.

3. Click VENDOR→LEDGER ENTRIES. The Vendor Ledger Entries window appears:



Notice that the **External Document No.** field is populated with the **Vendor Invoice No.** you entered on the Purchase Order. The entire amount of the Invoice appears in the **Original Amount**, **Amount** and **Remaining Amount** fields. Once a full payment has been posted and applied, the **Remaining Amount** will be 0.

Scroll to the right and click in the **Due Date** field. At first it appears that this field is non-editable but if you press F2, you see that you can edit this field. Microsoft Navision allows Due Dates, Discount Dates and Discount Amounts to be edited. Do not change the **Due Date**, leave it as 01/08/04. Close the Vendor Ledger Entries and the Vendor Card windows.

Item Card and Item Ledger Entries

Now we will look at the Item Card and the Item Ledger Entries.

1. From the Purchase menu, CLICK INVENTORY & COSTING→ITEMS. The Item Card window appears.
2. Press F5 or click the **List** button to display the Item List. Locate Item Paint, sunflower yellow and click on the line and press ENTER or click **OK**.
3. Click the **Invoicing** tab.
4. The **Average Cost (LCY)** field is now populated with a value. This field was automatically populated when you posted the purchase order. This field will get updated each time this item has activity posted.

Chapter 3: Order Processing – Purchases, Payables, and General Ledger

- Click ITEM→ENTRIES→LEDGER ENTRIES. The Item Ledger Entries window appears:

On	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Entry No.
	75	75	75	0.00	105.00	0.00	✓	317
	125	125	125	0.00	175.00	0.00	✓	318

There are two Item Ledger Entries; one for each Receipt that was posted.

- Click on the first line and click ENTRIES→VALUE ENTRIES. The Value Entries window appears:

Sales Amount (Actual)	Cost Amount (Expected)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	Item Ledger Entry Quantity	Valued Quantity	Invoiced Quantity
0.00	-105.00	105.00	0.00	0.00	0	75	75
0.00	105.00	0.00	0.00	0.00	75	75	0

There are two Value Entry lines: one for the Receipt and one for the Invoice. The two lines can be distinguished by looking at the **Item Ledger Entry Quantity** and **Invoiced Quantity** fields. The Receipt line will have a value in the **Item Ledger Entry Quantity** field but not in the **Invoiced Quantity** field. The Invoice line will be the opposite; the **Invoiced Quantity** field will have a quantity while the **Item Ledger Entry Quantity** field will be 0. In addition, the lines will have different document numbers.

Value entries are important because they capture all of the activity that constitutes the dollar amounts displayed in the Item Ledger Entry lines. This level of detail makes it very easy to audit the costs assigned to Items in Microsoft Navision.

7. Escape back to the Item Ledger Entries window.
8. Click on the second line and click ENTRIES→VALUE ENTRIES. The Value Entries window appears.

This Value Entry only displays a single line, with quantities in both the **Item Ledger Entry Quantity** and **Invoiced Quantity** fields. These fields are both populated because you posted the Receipt and Invoice simultaneously (using the Receive and Invoice posting option) during the final posting of the Purchase Order. You will learn more about Item Ledger Entries and Value Entries in later courses.

9. Close the Value Entries, Item Ledger Entries, and Item Card windows.

Test Your Skills – Creating a Purchase Order

Scenario: As the Purchasing agent for Cronus International, Ltd., you need to create a purchase order to purchase two items.

Use the following data to create the purchase order:

Purchase Order Number	System Assigned
Vendor Number	40101
Item Numbers	80216 and 80301
Item Name	Ethernet Cable & USB Mouse
Location Code	BLUE
Quantity for Item No. 80216	6
Quantity for Item No. 80301	12
Unit of Measure	PCS

All Skill Levels

Your tasks are as follows:

1. Using the information provided above, create a purchase order.
2. Verify that the Direct Unit Price for both Items.

Need a Little Help?

- Go to PURCHASE→ORDER PROCESSING→ORDERS.
- Create a new purchase order.
- Use the above data to fill the purchase order window.

Test Your Skills – Receiving and Invoicing a Purchase Order

Scenario: As the Purchasing agent for Cronus International, Ltd., you are responsible for purchasing items. You have created, printed and emailed a purchase order to the supplying vendor. Now, the items that are related to the purchase order have arrived on the warehouse dock. You can fully Receive and Invoice this order.

Use the following data to receive and invoice the items:

Purchase Order Number	Previously System Assigned Number
Vendor Number	40101
Item Numbers	80216 and 80301
Item Name	Ethernet Cable & USB Mouse
Location Code	BLUE
Quantity for Item No. 80216	6
Quantity for Item No. 80301	12
Vendor Invoice Number	LHF-10021

All Skill Levels

Your tasks are as follows:

1. Using the information provided above, receive and invoice the related purchase order.
2. Verify that the quantity(s) to receive is(are) correct.
3. Verify that the quantity(s) to invoice is(are) correct.
4. Receive and Invoice the Order.

Need a Little Help?

- Go to PURCHASE→ORDER PROCESSING→ORDERS.
- Fill in the **Vendor Invoice No.** field.
- Click on the **Posting** button and Receive and Invoice the Order.

Create a Purchase Invoice

Purchase Orders, as well as Sales Orders, are generally used for transactions involving inventory. While you can post an Item on a Purchase Invoice, you lose the receiving functionality. Purchase Invoices are mostly used for transactions involving general ledger activity. Purchase Invoices are also used most often for utility bills and other bills that you receive from vendors that do not affect inventory.

Scenario 4: As the Accounting Clerk for Cronus International, you are also responsible for posting utility bills. The postage bill has arrived and you need to post it into Microsoft Navision. The Vendor is No. 10000, London Postmaster; the date of the invoice is 01/01/04; the Invoice No. is 88574; the amount is 365.32 (LCY); and it needs to be posted to the Postage G/L Account.

But first, change the work date to better show functionality.

1. Click **TOOLS**→**WORK DATE**. The Work Date window appears.
2. Type 01/15/04 and press **ENTER** or click **OK**.
3. On the Purchase menu, click **ORDER PROCESSING**→**INVOICES**. The Purchase Invoice window appears:

T. No.	Description	Location	Quantity	Unit of M.	Direct U.	Line Amount

4. Press **F3** to insert a new Purchase Invoice.
5. Press **ENTER** to automatically assign a **No.**

6. In the **Buy-from Vendor No.** field, type 10000 and press ENTER. The header will be populated with the London Postmaster data.
7. Leave the **Posting Date** as 01/15/04 but in the **Document Date** field, change the date to the Invoice date: 01/01/04. The **Due Date** will now be based on the Invoice date, not your Posting Date.
8. In the **Vendor Invoice No.** field, type 88574. Similar to the Order, a Purchase Invoice cannot be posted without a **Vendor Invoice No.** Press ENTER and you should be taken into the lines section. If not, click in the lines.
9. In the **Type** field, press F6 to display the options. Since we are posting to a General Ledger Account, click **G/L Account** and then press ENTER.
10. In the **No.** field, press F6 to lookup to the **G/L Account List**. Locate the "Postage" G/L Account: 8240 and press ENTER twice.

Since G/L Account was selected in the **Type** field, this field represents the G/L Account No.
11. In the **Quantity** field, type 1. Since you are entering a full amount, there is no reason to break out the quantities.
12. In the **Direct Unit Cost Excl. VAT** field, type 365.32.
13. Scroll to the right and notice that the **Qty. to Receive** and **Qty. to Invoice** fields do not exist. Again, this is because this is not a receiving document.
14. Click POSTING→POST (F11). The message will appear asking if you want to post the Invoice. Click **Yes**.

Now that this Invoice is posted, you may notice that it has disappeared from the Purchase Invoice window. Just like the Purchase Order, when the Purchase Invoice is posted, it becomes a posted invoice. The posted invoices can be located on the Purchase menu by clicking HISTORY→POSTED INVOICES.

As stated previously, posted documents are not editable, but you can print them numerous times.

Close the Posted Purchase Invoice and the Purchase Invoice windows.

Test Your Skills – Record Automobile Maintenance Expense

Scenario: In Cronus International, Ltd. you are the accounts payable clerk, responsible for posting and paying expenses. You have received a bill from Mortimer Car Company for routine automobile maintenance services. You need to record this expense for payment.

Use the following data to enter the expense:

Purchase Order Number	System Assigned Number
Vendor Number	44127914
Vendor Name	Mortimer Car Company
Posting Date	01/14/04
Vendor Invoice Number	LP-45002
Item Type	G/L Account
G/L Account Number	8530
Description	Repairs and Maintenance
Amount	132.94

All Skill Levels

Your tasks are as follows:

1. Using the information provided above, record this expense for payment.
2. Post the invoice.

Need a Little Help?

- Go to PURCHASE→ORDER PROCESSING→INVOICES.
- Fill in the **Vendor Invoice number** field.
- Change the **Posting Date**.
- Go to the **Posting** button.

Payables Processing

In this section you will run the A/P Aging report and then print and post checks. We will not be defining every field on the report request form or the Suggest Vendor Payments form. For more information about the other fields, please use the F1 help.

Scenario 5: As the Accounting Clerk for Cronus International, you are also responsible for running the A/P Aging report prior to printing Vendor checks. Run the report for all vendors, aged as of 01/31/04, aged by the due date, with a period length of one month and print details.

Running the A/P Aging Report

On the Financial Management menu, click PAYABLES→REPORTS→AGED ACCOUNTS PAYABLE. The Aged Accounts Payable window appears.

1. The **Vendor** tab allows you to filter the report using the fields on the Vendor table. The **No.** field on this tab represents the Vendor No. Since you are running the report for all vendors, do not enter anything into the **No.** field.

***NOTE:** Did you notice that the tab is called Vendor? If this was a Customer report this tab would be called Customer. The table a report is running from will usually be the name of the first tab.*

2. Click on the **Options** tab.



3. In the **Aged As Of** field, type 01/31/04. This date determines how the aging will be calculated.

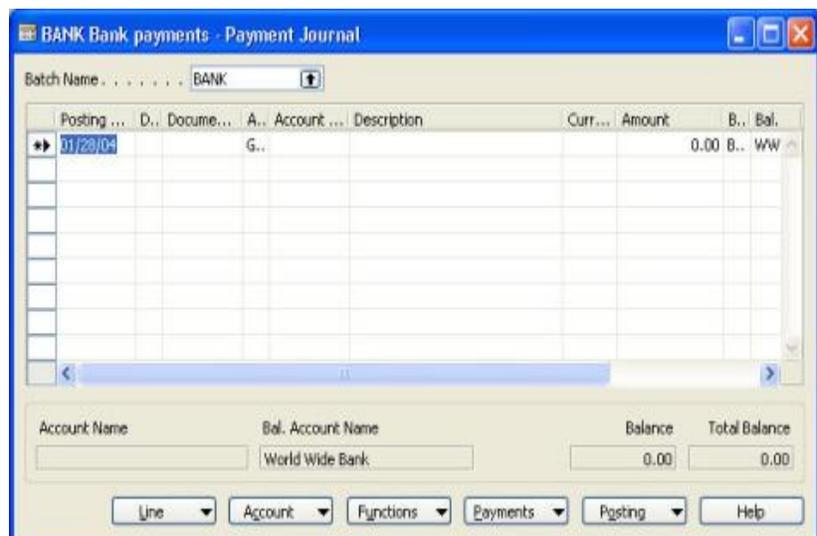
4. In the **Aging by** field, keep **Due Date** selected. In this area you select whether the aging will be calculated from the invoice due date, posting date or document date.
5. In the **Period Length** field, type 1M. This determines the length of the aging, in this case, one month.
6. Select the **Print Details** check box. Selecting this adds lines for open invoices for each vendor to the report. If this field is not checked, the invoice amounts will be summarized onto one line for each vendor.
7. Click **Preview**.
8. Take a look at the report. Notice the invoice you posted to London Postmaster appears as due this month. Go to the next page and look at the AR Day Property Management XYZ vendor. This invoice is due this month as well.
9. Close the Print Preview window.

Pay the Vendor

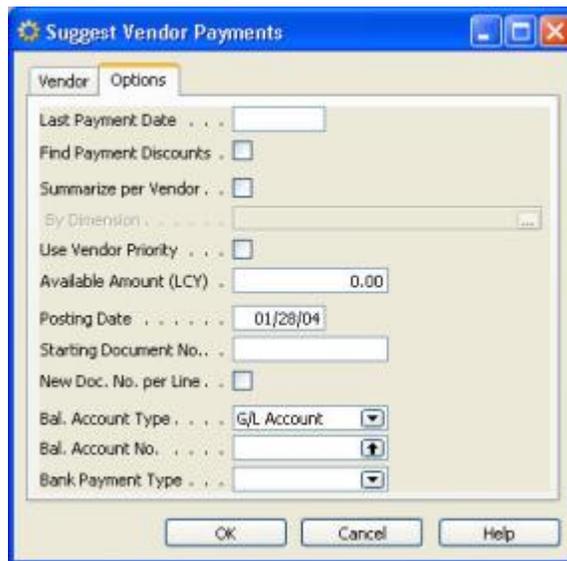
Scenario 6: It is the end of the month – as the Accounting Clerk for Cronus International, it is time to print Vendor checks. You will pay the Purchase Invoice for the paint to Vendor V00010 – AR Day Property Management XYZ.

But first, change the work date to better show functionality.

1. Click **TOOLS**→**WORK DATE**. The Work Date window appears.
2. Type 01/28/04 and press **ENTER** or click **OK**.
3. On the Financial Management menu, click **PAYABLES**→**PAYMENT JOURNALS**. The Payment Journal window appears:



4. In the **Batch Name** field, keep BANK selected.
5. Click PAYMENTS→SUGGEST VENDOR PAYMENTS. The Suggest Vendor Payments window appears. As you saw in the reporting section, the first tab of the request form is used for filtering on fields on that table. Here again you see it is the Vendor table. Since you want to look at the entries for AR Day Property Management XYZ you will filter the list by **Vendor No.**
6. In the **No.** field, type V00010.
7. Click the **Options** tab.

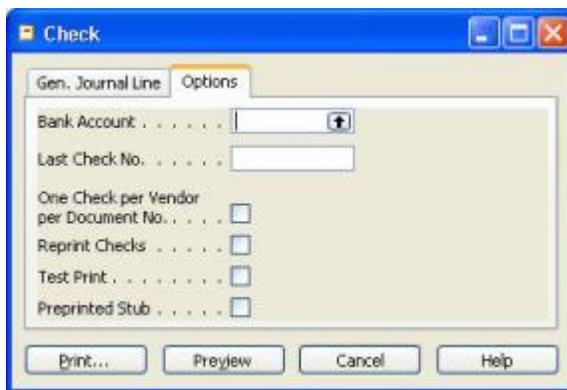


8. In the **Last Payment Date** field, type 01/31/04.
9. In the **Posting Date** field, leave the work date of 01/28/04.
10. In the **Bal. Account Type** field, click the **AssistButton** and click Bank Account.
11. In the **Bal. Account No.** field, click the **AssistButton**, click WWB-OPERATING and click **OK**.
12. In the **Bank Payment Type** field, click the **AssistButton** and click Computer Check. Selecting Computer Check directs Microsoft Navision to create a computer check for printing, otherwise if you just need to post a handwritten check in the system, you should select Manual Check.
13. Click **OK**.

- The Payment Journal should display one line and a message should appear stating that you have created suggested vendor payment lines for all currencies. Click **OK**.

***NOTE:** Quite often several lines will come into the Payment Journal when you run the Suggest Vendor Payment batch job. You can delete the lines you do not want to pay by selecting those lines and pressing F4. They are ONLY removed from this particular payment journal and can be suggested again.*

- Press ARROW-UP to go to the first line. Notice that the **Posting Date** is the work date and that the **Amount** field is populated with the amount of the Purchase Invoice: 350.00.
- Scroll over to the **Applies-to Doc. No.** field. Press F6 to open the **Apply Vendor Entries** window.
- In the lines, click on the first line and click **Navigate**. In the Navigate window, with Posted Purchase Invoice selected, click **Show**. From the Posted Purchase Invoice window, click on the first line and then click INVOICE→CARD. The Posted Purchase Invoice you created for the paint appears.
- Press ESC four times to get back to the Payment Journal.
- Click PAYMENTS→PRINT CHECK. The **Check** request form window appears.
- Do not change the filters set on the **Gen. Journal Line** tab.
- Click the **Options** tab.



- In the **Bank Account** field, press F6, click on the WWB-OPERATING line and press ENTER or click **OK**. Press ENTER again.
- The **Last Check No.** field will automatically be populated from the **Last Check No.** field on the Bank Account card.

24. Select the **One Check per Vendor per Document No.** check box. By checking this box, you get one check per vendor for each check number.
25. Click **Print**.
26. In the Check – Print dialog window, verify that Microsoft Navision is pointing to the correct printer, and click **OK**.

***NOTE:** If you do not want to print an actual check for this exercise select the **Print to file** check box on the Check – Print dialog window and click **OK**. The **Print to File** window will appear. Type a file name and click **OK**.*

27. A second line now appears in the Payment Journal. This is the bank balancing line.
28. Notice that the **Document No.** field on both lines is populated with the check number that was automatically populated on the **Options** tab of the Check window.
29. Click on the second line and notice that the **Balance** and **Total Balance** fields in the lower right corner both display "0". This indicates that this journal is in balance and can be posted – you cannot post journals that do not balance.
30. Click **POSTING→POST (F11)**. A message appears asking if you want to post the journal lines. Click **Yes**.
31. The Payment Journal runs through the posting process and then when completed, a message appears indicating that the lines were successfully posted. Click **OK**.
32. Do not close the Payment Journal window.

Manually Entering a Payment Journal Line

Instead of running the Suggest Vendor Payments batch job, you are able to manually enter payment lines.

Scenario 7: The postage bill for London Postmaster (Vendor No. 10000) is due for payment. You decide to manually enter the line rather than using the Suggest Vendor Payments batch job.

1. Using the same batch **BANK**, click on the empty line in the payment journal.
2. Leave the **Posting Date** as 01/28/04.

3. In the **Document Type** field, leave Payment.
4. Clear the **Document No.** field.
5. In the **Account Type** field, press F6 and click Vendor.
6. In the **Account No.** field, type 10000.
7. In the **Applies-to Doc. No.** field, press F6 to open the Apply Vendor Entries window.
8. Notice that there are several line entries. All of the open entries for this Vendor appear in the detail lines. The last line entry is the postage invoice which you need to pay. Click on that line and press ENTER or click **OK**.
9. Notice that the **Applied-to Doc. Type** field is Invoice and the **Applied-to Doc. No.** field is the same as the Document No. from the Posted Purchase Invoice. The **Amount** field has also been automatically populated with the amount of the Posted Purchase Invoice.
10. In the **Bank Payment Type** field, type C and press ARROW DOWN. Notice that the field now displays Computer Check. In option fields, you can type in the selection rather than using the drill-down function.

REMEMBER: Some option lists may contain words that begin with the same letters so always verify your selection before moving on.

Most fields in Microsoft Navision allow you to type data in rather than looking up to tables or drilling-down to menus. If you know the information, feel free to type it into the fields directly. If the data does not exist or is incorrect, an error will appear, giving you the chance to make another selection from the table or the list.

11. Click PAYMENTS→PRINT CHECK. The Check window appears.
12. Do not change the filters set on the **Gen. Journal Line** tab.
13. Click the **Options** tab.
14. Note that the settings selected in the last print check scenario remain. Do not change the following:

Bank Account	WWB-OPERATING
Last Check No.	200 (if other, still do not change)
One Check per Vendor per Document No.	Yes (checked)

15. Click **Print**.
16. In the Check – Print dialog window, verify that Microsoft Navision is pointing to the correct printer, and click **OK**.

***NOTE:** If you do not want to print an actual check for this exercise select the Print to file check box on the Check – Print dialog window and click OK. The Print to File window will appear. Type a file name and click OK.*

17. A second line now appears in the Payment Journal. This is the bank balancing line.
18. Click POSTING→POST (F11). A message appears asking if you want to post the journal lines. Click **Yes**.
19. The Payment Journal runs through the posting process and then when completed, a message appears indicating that the lines were successfully posted. Click **OK**.
20. Close the Payment Journal window.

***NOTE:** It is possible to post a payment to a vendor without applying the payment to an invoice. To accomplish this, you would setup the Payment Journal as shown above but leave the Applies to Doc. Type and Applies to Doc. No. fields blank. These types of entries may then be applied at a later time using functionality in the Vendor Ledger Entries window.*

Vendor Ledger Entries

Go to the Vendor card to view the entries made in the last two scenarios.

1. On the Purchase menu, click ORDER PROCESSING→VENDORS. The Vendor Card window appears.
2. Locate Vendor V00010 (AR Day Property Management XYZ).
3. On the **General** tab, note that the **Balance** field is 0.
4. In the **Balance** field, press F6 to go to the Vendor Ledger Entries. The Vendor Ledger Entries window appears.
5. There are two entries now: one for the Invoice and one for the Payment. The **Document Type** field displays the type of entry.
6. Scroll to the right. Notice that the **Remaining Amount** field is 0 and the **Open** check box is empty for both lines.
7. Escape back to the Vendor Card.
8. Find Vendor 10000 (London Postmaster).

9. In the **Balance** field, click F6 to go to the Vendor Ledger Entries. The Vendor Ledger Entries window appears.
10. Scroll to the bottom of the list to view the Invoice and Payment entries.
11. As with vendor V00010, the **Remaining Amount** field is 0 and the **Open** check box is empty for both lines.
12. With the record indicator on the Payment Line (Document Type = Payment), click ENTRY→APPLIED ENTRIES. The Applied Vendor Entries window appears.

This window indicates that the payment has been applied to the invoice. If the payment had been applied to other entries (invoices and/or credit memos) they would also be displayed in this window.

13. Close the Applied Vendor Entries, Vendor Ledger Entries and Vendor Card windows.

Test Your Skills – Pay the Automobile Maintenance Expense

Scenario: In Cronus International, Ltd. you are the accounts payable clerk, responsible for paying expenses. You have posted the invoice from Mortimor Car Company for routine automobile maintenance services and you now need to pay the invoice. You will print (to file) and post the check.

Using Suggest Vendor Payments, use the following data to enter the payment:

Batch Name	BANK
No. (Vendor tab)	44127914
Options tab:	
Last Payment Date	01/31/04
Posting Date	01/31/04
Bal. Account Type	Bank Account
Bal. Account No.	WWB-OPERATING
Bank Payment Type	Computer Check

All Skill Levels

Your tasks are as follows:

1. Use the information provided above, and then use the Suggest Vendor Payments functionality.
2. Print the check to a file.
3. Post the Payment Journal.

Need a Little Help?

- Go to FINANCIAL MANAGEMENT→PAYABLES→PAYMENT JOURNAL.
- Fill in the Suggest Vendor Payments using the information above.
- Go to the **Payments** button.

HINT: Remember to use the WWB OPERATING bank and print one check per vendor per document number.

- Print check to file.
- Go to the **Posting** button.

General Ledger Adjustments

You use the General Journal window to post transactions to G/L, bank, customer, vendor, fixed assets, and IC (intercompany) partner accounts. In a general journal, you enter the relevant information for the transaction, such as the posting date, amount and the accounts you want to post to. The information you enter in a journal is temporary and can be changed as long as it is in the journal.

After you post a journal, the journal will be empty and the transactions will be posted to individual accounts. You can view the results of posting a journal in the ledger entry windows and register windows. Posting with a general journal always creates entries on G/L accounts.

We will not be defining every field on the General Journal window. For more information about the other fields, please use the F1 help. You also need to setup a new General Journal batch for this exercise.

Create a General Journal Adjustment

Scenario 8: During the closing process for January, you find out from the Accounting Manager that the London Postmaster bill was supposed to be allocated as follows:

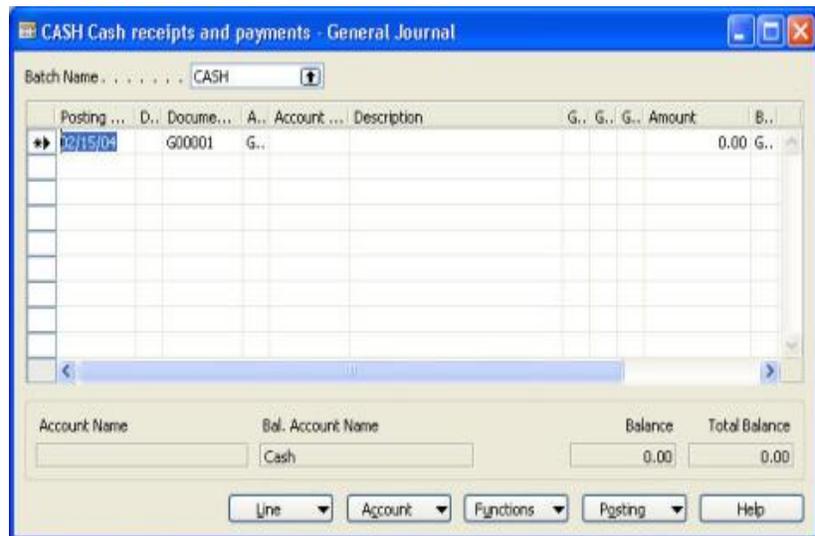
- Postage (8240) = 308.00
- Office Supplies (8210) = 57.32

You must make an adjustment to the General Ledger.

But first, change the work date to better show functionality.

1. Click **TOOLS**→**WORK DATE**. The Work Date window appears.
2. Type 02/15/04 and press **ENTER** or click **OK**.

3. On the Financial Management menu, CLICK GENERAL LEDGER→GENERAL JOURNALS. The General Journal window appears:



4. In the **Batch Name** field, press F6 to open General Journal Batches window.
5. Press F3 to insert a new line.
6. In the **Name** field, type GENERAL and then press ENTER. This line will move to the end of the list since it sorted alphabetically.
7. In the **Description** field, type General Journal.
8. In the **No. Series** field, leave GJNL-GEN as the selection.
9. While on the GENERAL line, click **OK** and press ENTER.
10. In the **Posting Date** field, type 01/31/04. This ensures that the adjustment is made in the same period as original entry.
11. Leave the **Document Type** field empty.
12. In the **Document No.** field, leave the number entered by the program. This number was retrieved by the program based on the GJNL-GEN No. Series entered for the GENERAL journal batch.
13. In the **Account Type** field, press F6 and click G/L Account.
14. In the **Account No.** field, press F6 and find the G/L account number for Postage: 8240. Click **OK** and press ENTER.
15. Note that the **Description** field was automatically filled in with the account name Postage. This is done to help the end user confirm that the correct account was selected. You can now type over the description with whatever you like, such as a description for why the transaction is being made.

In the **Description** field, type Correction to Document No. 108033.

16. In the **Amount** field, type -57.32 to make a credit entry to the Postage account.

In the general journal, a positive amount represents a debit to the account in the **Account No.** field while a negative amount represents a credit to the account.

17. In the **Bal. Account Type** field, leave G/L Account as the selection.
18. In the **Bal. Account No.** field, press F6, select the Office Supplies account number, 8210, and then click **OK**. Press ENTER.
19. Clear the **Bal. Gen. Posting Type**, **Bal. Gen. Bus. Posting Group** and **Bal. Gen. Prod. Posting Group** fields. These fields should only be populated when making a VAT entry. For our scenario, we do not need to post VAT entries.

The journal lines displayed in the batch are balanced when the **Total Balance** field equals 0. You cannot post journals that do not balance.

The journal entry is now complete, and you can post it. When you post a journal you can post or post and print a copy of the journal for you records. In this case, we will only post the journal.

20. Click POSTING→POST (F11). A message appears asking if you want to post the journal lines. Click **Yes**.
21. The Journal runs through the posting process and then when completed, a message will appear indicating that the lines were successfully posted. Click **OK**.
22. Close the **General Journal** window.

General Journal Registers

Scenario 9: Now that you have adjusted the General Journal, you should view the entries. General Ledger entries are best viewed from the G/L Register.

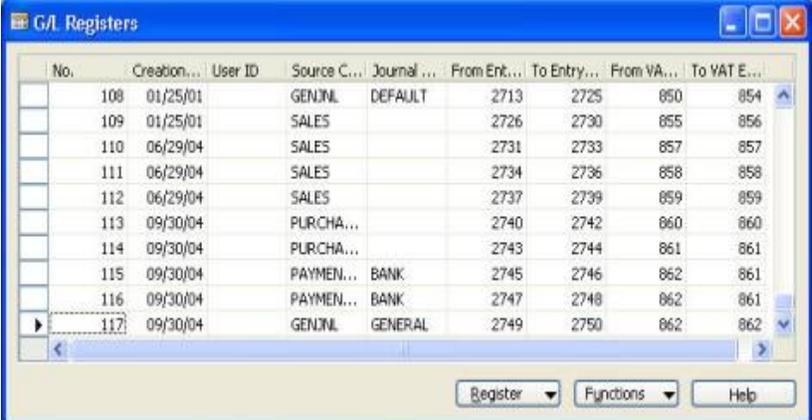
Each time an entry is posted in Microsoft Navision, a Register is created. For the General Journal you posted, a G/L Register is created.

The G/L entries in a G/L register are the result of the following: posting of a journal in the General Ledger, Sales, Receivables, Purchases, or Payables application areas; posting of sales orders, invoices and credit memos; posting of purchase orders, invoices and credit memos; and other areas of Microsoft Navision.

You can see the G/L registers for the General Ledger, Sales, Receivables, Purchases, and Payables application areas under the History menu item on the menu of each application area.

Following the Audit Trail

1. On the Financial Management menu, click GENERAL LEDGER→HISTORY→REGISTERS. The G/L Registers window appears. Registers contain the information for the Audit Trail in Microsoft Navision.
2. Go to the bottom of the G/L Registers window (CTRL + PAGE DOWN).



No.	Creation...	User ID	Source C...	Journal ...	From Ent...	To Entry...	From VA...	To VAT E...
108	01/25/01		GENJNL	DEFAULT	2713	2725	850	854
109	01/25/01		SALES		2726	2730	855	856
110	06/29/04		SALES		2731	2733	857	857
111	06/29/04		SALES		2734	2736	858	858
112	06/29/04		SALES		2737	2739	859	859
113	09/30/04		PURCHA...		2740	2742	860	860
114	09/30/04		PURCHA...		2743	2744	861	861
115	09/30/04		PAYMEN...	BANK	2745	2746	862	861
116	09/30/04		PAYMEN...	BANK	2747	2748	862	861
117	09/30/04		GENJNL	GENERAL	2749	2750	862	862

G/L Register No. 117 is the most recently posted activity, our journal entry. The Register **No.** is generated automatically by Microsoft Navision, as are the numbers in the **From Entry No.**, **To Entry No.**, **From VAT Entry No.**, and **To VAT Entry No.**

3. The **Creation Date** is not the **Posting Date** or the Work Date. You can see from our entry that the **Creation Date** is the date on your system, not the Work Date of 02/03/04 or the **Posting Date** of 01/31/04.
4. The **User ID** field would be shown if individual users have been set up for the database, which is not the case for this demo database.
5. The **Source Code** field identifies the area of Microsoft Navision that created the entries. Note that the **Source Code** on this line is GENJNL. Next we will review how this Source Code is assigned.
6. On the Financial Management menu, click SETUP→TRAIL CODES→SOURCE CODES. The Source Codes window appears. In this window you can see a listing of Source Codes for Microsoft Navision. These codes are provided as defaults in the database; you may create others.

7. On the Navigation Pane, click TRAIL CODES→SOURCE CODE SETUP. The Source Code Setup window appears. In this window, each Source Code is linked to a posting option in Microsoft Navision. For example, on the **General** tab, GENJNL is assigned to the General Journal and ADJAPPCORR is assigned to Adjust Add. Reporting Currency.

This is why GENJNL appears as the Source Code in the Register for our transaction.

8. Close the Source Code Setup and Source Codes windows.
9. On the G/L Register, click on the last line.
10. The Journal Batch Name has been populated based on the batch we were using when we posted the General Journal.
11. Make a note of the numbers in the **From Entry No.** and **To Entry No.** fields. We will be checking these against other windows in a moment.
12. While still on line No. 117, click REGISTER→GENERAL LEDGER. The General Ledger Entries window appears. The lines that constitute the Register No. 117 are displayed in this window.
13. Compare the **Entry No.** field on the far right to the number you noted in step 11 – they are the same. Microsoft Navision assigns a unique, sequential number to each line or entry posted. This allows for a complete audit trail.
14. Close the General Ledger Entries and G/L Registers window.
15. On the Navigation Pane, click GENERAL LEDGER→CHART OF ACCOUNTS. The Chart of Accounts window appears.
16. Locate the Postage account: 8240 and click ACCOUNT→LEDGER ENTRIES. The General Ledger Entries window appears.
17. Go to the bottom of the General Ledger Entries window (CTRL + PAGE DOWN).
18. In this list, the **Entry No.** is the last field displayed. With the last line selected, click **Navigate**.
19. On the G/L Entry line, the **No. of Records** field indicates that there were two G/L lines posted with the Register.
20. Click on the **G/L Entry** line and click on **Show**. The General Ledger Entries window appears. The lines posted in the register are displayed here. The Entry Numbers can be used to determine to which Register an entry belongs.

21. Close the General Ledger Entries, Navigate, General Ledger Entries, and Chart of Accounts windows.
22. On the Navigation Pane, under General Ledger click REPORTS→ENTRIES→G/L REGISTER. The G/L Register request form window appears.
23. In the **No.** field, press F6 to open the G/L Registers window. Locate the Register No. for the General Journal you posted earlier. (117) Click on the line and click **OK**.
24. Click **Preview**. The G/L Register report is displayed.

This report shows posted G/L entries sorted and divided by each register and can be used as documentation of the posted entries or for auditing.
25. Close the Print Preview window.

Test Your Skills – Adjust the Automobile Maintenance Expense

Scenario: In Cronus International, Ltd. you are the Accounting Manager who is responsible for G/L adjustments. The Mortimor Car Company bill had a gasoline charge on it and you need to reallocate as follows:

- Repairs and Maintenance (8530) = 115.00
- Gasoline and Motor Oil (8510) = 17.94

Use the following data to enter the adjustment:

Batch Name	GENERAL
Posting Date	01/31/04
Account Type	G/L Account
Account No.	8530
Description	Correction to Document No. 108029
Amount	-17.94
Bal. Account Type	G/L Account
Bal. Account No.	8510
Bal. Gen. Posting Type	<blank>
Bal. Gen. Bus. Posting Group	<blank>
Bal. Gen. Prod. Posting Group	<blank>

All Skill Levels

Your tasks are as follows:

1. Enter the information provided above into the General Journal.
2. Post the General Journal.

Need a Little Help?

- Go to FINANCIAL MANAGEMENT→GENERAL LEDGER→GENERAL JOURNALS.
- Fill in the fields using the information above.
- Go to the **Posting** button.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.
