TRAINING TRANSCRIPT

Finance Center

Smart Vendor and Procurement System
redSling UI Builder

Introduction and Page Setup

Welcome to this training module on creating the Finance Center for the Smart Vendor and Procurement System. In this module, we will build the Finance Center interface from the ground up using the redSling UI Builder. We will create the page structure, add the Finance Center header and supporting text, configure action buttons, build an invoice table, and then create the vendor invoice submission and invoice review sections.

Let's begin by setting up the page structure.

Creating the Page Layout

Let's start with the basic page structure. From the Blocks panel, we can use the available layout components to define the structure of our page. Add the required column structure to the canvas and adjust the dimensions using the General and Dimension settings available in the right-hand panel. The builder allows us to control properties such as width, height, minimum and maximum dimensions, as well as margins and spacing.

As we add each section, the selected component is highlighted on the canvas, making it easy to identify and configure the specific element we are working with.

Creating the Finance Center Header

Now let's create the main heading for the page. Select the text component in the header section and enter Finance Center. This will serve as the primary heading for the module. Next, add the supporting description below the heading. Enter Invoice and payment management. This gives users immediate context about the purpose of the Finance Center. We can now use the Typography settings to adjust the appearance of the heading and supporting text, including font size, font weight, alignment, and other text properties.

Adding the Submit Invoice Action

Next, we'll add the primary action for this page. From the Blocks panel, add a button to the header section. Set the button label to Submit Invoice. We can then configure its typography, dimensions, spacing, and background styling from the right-hand configuration panel. The button is styled in green to make it visually prominent as the primary action. At this stage, the Finance Center has its basic header, description, and primary action in place.

Adding the Table Component

Let's now create the invoice listing. From the Blocks panel, open the Table Components section and add the table component to the page. Once the table is placed on the canvas, select it to open its configuration options. The table configuration provides several options that allow us to control different aspects of the table, including its columns, styling, header, body, badges, and footer.

Configuring Table Columns

Let's configure the table columns. Open the Configure Table dialog and navigate to the table configuration section. Add the columns required for the invoice listing. The table includes: Invoice ID PO Number Vendor Amount Submitted On Due Date Status Action Each column can be configured independently. This gives us a structured view of the invoices and provides space for status and action controls.

Configuring Table Data and Header

Once the columns are defined, we can configure the table data. The sample table displays vendor invoice records along with their status and financial information. We can also configure the appearance of the table header. In this example, the header is given an orange background to visually separate the column headings from the table data. The table now provides a clear summary of the invoice records available to the finance team.

Applying the Table Configuration

Once the configuration is complete, apply the changes. The configured invoice table is now visible on the Finance Center page. We have a structured listing of invoices with vendor, amount, dates, status, and action information. This completes the invoice listing section.

Adding the Submission Section

Next, we'll create the vendor invoice submission section. Add a new section below the invoice table. For the heading, enter Submit Vendor Invoice. This section will allow users to enter the information required to submit a vendor invoice for review.

Adding Supporting Text

Add supporting text below the heading. Enter: Upload and submit a vendor invoice for review. This provides a clear explanation of what the section is intended for.

Adding Invoice Input Fields

Now let's add the invoice information fields. First, add the PO Number field. Next, add the Invoice Amount field. Below these fields, add the Invoice Date and Due Date fields. The fields can be arranged using the column structure so that related information appears together. For the date fields, use the appropriate date input component. The Dimension and spacing controls can then be used to maintain consistent alignment between the fields.

Adding the Comments Field

Next, we'll add a comments field. Use the appropriate text-area component and position it below the invoice information. This field allows the user to enter any additional information or comments associated with the invoice. Adjust the height and spacing so the comments area provides sufficient room for user input.

Adding Cancel and Submit Buttons

Now we'll add the form actions. Add a Cancel button and position it on the left. Then add the primary Submit Invoice button. The Submit Invoice button is styled in green, while the Cancel action uses a contrasting orange style. This gives users a clear visual distinction between the primary submission action and the secondary cancellation action.

Reviewing the Submission Form

Let's review the completed submission section. We now have the Submit Vendor Invoice heading and supporting description, followed by the PO Number, Invoice Amount, Invoice Date, Due Date, and Comments fields. At the bottom, users can either cancel the operation or submit the invoice for review. This completes the invoice submission form.

Creating the Invoice Review Section

Next, we'll create the invoice review section. Add a new section below the submission form. For the heading, enter: Invoice Review: INV-2025-005 This identifies the invoice currently being reviewed.

Adding Review Description

Below the heading, add the supporting text: Review invoice details before approval. This tells the user that this section is intended for reviewing the invoice before an approval decision is made.

Adding Invoice Review Fields

Now we'll add the invoice details that the reviewer needs to verify. Start with Invoice ID and Invoice Number. Next, add the Vendor and Amount fields. Finally, add the Submitted On and Due On fields. Use the layout and column components to arrange these fields into a clean two-column structure. This keeps the review information compact and easy to scan.

Adding Approval Actions

Once the invoice information is displayed, we need to provide the reviewer with decision actions. Add an Approve Invoice button. Next, add a Reject Invoice button. These actions allow the reviewer to make a decision after validating the invoice details.

Styling the Review Actions

Let's now configure the appearance of these actions. Use the styling options to differentiate the two buttons visually. The Approve Invoice action uses green to represent a positive approval action. The Reject Invoice action uses orange to distinguish the alternative decision. Adjust the dimensions, spacing, and alignment so both actions are positioned consistently within the review section.

Refining Layout and Styling

With the main functionality of the page in place, let's refine the layout. Select the individual components and use the right-hand configuration panel to adjust their dimensions. The Dimension settings allow us to control width and height. Use the Margin and Padding settings to maintain consistent spacing between sections. The Typography settings can be used to refine headings and supporting text.

We can also configure borders and background properties to provide visual separation between different areas of the Finance Center. The goal is to maintain consistent spacing and alignment throughout the page.

Final Page Review

Let's take a final look at the Finance Center. At the top, we have the Finance Center heading with the description Invoice and payment management and the Submit Invoice action. The next section contains the invoice listing table with invoice, purchase order, vendor, amount, submission date, due date, status, and action information. Below the table is the Submit Vendor Invoice section where users can enter the invoice details and submit them for review.

Finally, the Invoice Review section provides the invoice information required for validation, along with the Approve Invoice and Reject Invoice actions.

Module Summary

In this module, we created the Finance Center using the redSling UI Builder. We started by creating the page layout and Finance Center header. We then added and configured the invoice table, including its columns and styling. Next, we created the vendor invoice submission form with the required invoice and date fields, comments area, and submission actions. Finally, we created the invoice review section with invoice details and approval or rejection actions.

This demonstrates how the redSling UI Builder can be used to create a complete finance workflow interface using configurable UI components, layouts, and styling options. That completes the Finance Center training module.