TRAINING TRANSCRIPT

Purchase Order Center

Smart Vendor and Procurement System
redSling UI Builder

Introduction and Page Setup

Welcome to this training module on creating the Purchase Order Center for the Smart Vendor and Procurement System. In this module, we will create the Purchase Order interface using the redSling UI Builder. We will start by setting up the page layout and header, then create the purchase request approval section, configure the purchase order table, add search functionality, and finally create the form for generating a purchase order.

Let's begin by setting up the page.

Setting Up the Page Structure

Let's start by defining the basic layout of the Purchase Order Center. From the Blocks panel, we can use the available column components to create the required page structure. Add the required columns to the canvas and adjust their dimensions using the configuration options on the right. We can use the Dimension settings to control the width and height of each section. We can also adjust the padding and margins to maintain consistent spacing throughout the page.

The Layers panel can be used to view and navigate through the different rows, cells, and components that make up the page.

Creating the Purchase Order Header

Now let's create the main heading for the page. Add a text component and enter Purchase Order Center. Below the heading, add the supporting description: Generate and manage purchase orders. This gives users a clear understanding of the purpose of the page. Next, we'll add the primary action button. Add a button and set its label to Generate PO. We can use the Typography and Dimension settings to adjust the appearance and size of the button.

The green styling makes the Generate PO action visually prominent.

Creating the Approval Section

Next, we'll create a section for purchase request approvals. Add a new section below the header and enter the heading: Approve Purchase Request This section will contain the purchase requests that require approval before a purchase order can be generated. We'll use a table component to display the relevant purchase request information.

Adding the Approval Table

From the Table Components section, add the table component to the approval section. Once the table is added, open its configuration options. The table configuration allows us to define the columns that will be displayed and customize different aspects of the table. For this purchase request approval table, we'll configure the required fields for identifying and reviewing purchase requests.

Configuring Approval Table Columns

Let's configure the table columns. The approval table includes information such as: PR ID Item Amount Approved By Approved On Total Status These columns provide the information required to review the purchase requests. The table configuration also allows us to reorder or remove columns when required. Once the required columns are configured, we can apply the changes to the table.

Styling the Approval Table

Now let's configure the appearance of the table. The table header is styled with an orange background to clearly distinguish the column headings from the data rows. The table displays sample purchase request records such as Alice Martin, Ben Carter, and Clara Singh, along with their respective statuses and amounts. A total row is also included at the bottom of the table to provide a summary of the purchase request amounts.

The table can be further refined using the Background, Border, Dimension, and Typography settings.

Adding Purchase Order Search

Next, we'll add a search section below the purchase request table. Add a text or heading component and enter: Purchase Order Next, add a dropdown field that can be used to select the required purchase order. Beside the dropdown, add a Search button. This allows users to select a purchase order and initiate a search. We can adjust the width of the dropdown and Search button using the Dimension settings so that both components are aligned properly.

Configuring Search Layout

Let's refine the search area. The Purchase Order label is positioned on the left, followed by the selection field and the Search button. Use the Dimension settings to control the width of the individual components. The Search button is styled in orange to maintain consistency with the overall interface. We can also adjust margins and spacing so that the controls remain properly aligned within the section.

This completes the purchase order search area.

Creating the Purchase Order Table

Now let's add the main Purchase Order table. From the Table Components section, add the table to the page. Open the table configuration and define the required columns. The Purchase Order table contains: PO ID PR ID Item Vendor Amount Total Status These fields provide a consolidated view of the purchase orders generated from approved purchase requests.

Configuring Purchase Order Table Data

Let's configure the table data. The table displays sample records for different purchase orders. For example, we can see records associated with Alice Martin, Ben Carter, and Clara Singh, along with their respective purchase request status and amounts. The total row provides a summary of the purchase order values. The table header uses the same orange styling to maintain visual consistency across the Purchase Order Center.

Once the configuration is complete, apply the changes and review the table on the page.

Creating the Generate Purchase Order Section

Next, we'll create the form used to generate a purchase order. Add a new section below the purchase order table. Enter the heading: Generate Purchase Order Below the heading, add the supporting description: Assign vendor and generate PO for PR-2025-018. This indicates that the form is being used to assign a vendor and generate a purchase order for the selected purchase request.

Adding Contact Information

Now let's start building the purchase order form. We'll begin with the contact information. Add an Email ID field and mark it as required. Use the placeholder: Enter your email address. Next, add a Phone Number field and mark it as required. Use the placeholder: Enter your phone number. Arrange these two fields side by side using the two-column layout. This creates a compact and structured form.

Adding Purchase Request Information

Next, we'll add the purchase request details. Add a PR Number field. Since this field contains a number, use the appropriate Number Input component. Next, add an Item Name field using a text input. The Item Name field allows the user to specify the item associated with the purchase request. Keep these two fields aligned side by side to maintain the structure of the form.

Adding Vendor Selection

Next, we need to assign a vendor to the purchase order. Add the Assign Vendor field and mark it as required. Use a dropdown component so that the user can select the appropriate vendor. Position this field below the PR Number and Item Name fields. The dropdown provides a controlled way of selecting the vendor associated with the purchase order.

Adding Expected Delivery Date

Now let's add the expected delivery information. Add the Expected Delivery Date field. Use the Date Input component so that users can select the expected delivery date. The date field provides a calendar selector and ensures that the delivery date is captured in a consistent format. Position this field below the vendor selection.

Adding Payment Terms

Next, we'll add the payment information. Add the Payment Terms field. Use a dropdown component so that the user can select the applicable payment terms. Position this field below the Expected Delivery Date. This completes the key information required for generating the purchase order.

Adding Form Actions

Now we'll add the actions for the purchase order form. Add a Cancel button to allow the user to exit the form without proceeding. The form can also include the primary action for generating the purchase order. Position the actions at the bottom of the form and use the Dimension and spacing settings to keep them properly aligned. These actions provide the user with a clear way to either cancel or proceed with the purchase order generation.

Refining the Form Layout

Let's now refine the overall form layout. Review the spacing between each field and use the Margin and Padding settings wherever necessary. Make sure the Email ID and Phone Number fields are aligned correctly. The PR Number and Item Name fields should follow the same two-column structure. The Assign Vendor, Expected Delivery Date, and Payment Terms fields can use the full available width.

This creates a clean and consistent purchase order form.

Final Review and Summary

Let's take a final look at the Purchase Order Center. At the top, we have the Purchase Order Center heading, the supporting description, and the Generate PO action. The next section contains the Approve Purchase Request table, where users can review purchase requests and their approval information. We then have the Purchase Order search area, followed by the main Purchase Order table containing PO ID, PR ID, item, vendor, amount, total, and status information.

Finally, we created the Generate Purchase Order form. The form captures the user's email ID and phone number, PR number, item name, assigned vendor, expected delivery date, and payment terms. This completes the Purchase Order Center interface. In this module, we demonstrated how to combine layout components, tables, input controls, dropdowns, date fields, buttons, and styling options to create a complete purchase order workflow in the redSling UI Builder.

That completes the Purchase Order training module.