# Processor Portal Dashboard Overview

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## V1.0

#### Overview

The Processor portal dashboard offers an industry-standard modern experience designed for efficiency and ease of use. As a processor, you will enjoy a refined and intuitive user interface, ensuring seamless navigation and instant access to critical insights.

With its latest theme and enhanced visual appeal, the dashboard not only elevates usability, but also provides a personalized and dynamic view of your key procurement metrics. Designed for speed and precision, it empowers you to make informed decisions effortlessly while enjoying a sleek, polished experience like never before.

This next-generation, industry-standard dashboard is more than just a visual upgrade, it's a powerful tool that brings data driven decision making to your fingertips.

### Key features

#### User-friendly UI

The Genpact AP Advance UI is designed to transform the look and feel of your Salesforce environment with a sleek, modern, and professional appearance. The theme enhances user engagement by providing a visually appealing interface that aligns with your brand identity.

- Elegant design: Crafted with a stylish and intuitive layout that enhances user experience.
- Brand customization: Allows administrators to incorporate company branding, including logos, colors, and backgrounds.
- Seamless integration: Easily applies across the Salesforce platform without disrupting functionality.
- User-friendly configuration: Simple setup and activation steps ensure a hassle-free experience for administrators.
- Enhanced readability: Optimized color contrasts and clean typography for improved readability and accessibility.

To configure the Genpact AP Advance theme, follow the steps below:

- 1. Log in to the Salesforce as an admin.
- 2. Click the gear icon (۞) in the top-right corner and click on **Setup**.
- 3. Search for and select **Themes and Branding**.
- 4. Click **New Theme** to create a new one.
  - Enter the name **AP Advance** for your theme.

or

Customize the theme by modifying an existing one:

A theme is a set of co	lors and images that represents your org's brand. You can create your or	in theme or choose from a set of built in themes provided by Salesforce.	
Theme Details			
*Theme Name	*API Name O	Description	
AP Advance	APAdvance	AP Advance	
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#### Standard reports

Genpact AP Advance supports the following standard reports out-of-the-box.

- Al Invoice Priority Ranking Report
- Touchless Invoices Report
- Exception Invoices Report
- Invoice Ageing Report
- Invoice AP Touchless Report
- Invoice AP Touch Count Report
- Vendor by Amount Report
- Pending Approval Invoices Report
- Invoices by Input Source Report

Follow the steps below, to view the reports in the system:

- 1. Log in to the Salesforce as an admin.
- 2. Navigate to Reports from the App Launcher icon (grid icon) in the top-left.
- 3. Go to All Reports.

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AP Advance	Home Invoice * Reports	V X Purchase Order GRN Payment Line	s 🗸 System Configurations 🗸	TAT Rules UI Setup Validation Excepti
Reports All Reports 127 items				
Reports	Report Name	✓ Description ✓	Folder	✓ Created By
Recent Created by Me	AbnormalAmountInvoices	This report shows invoices which were flagged as Abnormal amount from the Fraud batches.	Fraud Detection Reports	VSTS Admin
Private Reports Public Reports	Ageing Report	This report shows involces in various non completion states along with their ageing. Ageing can be based on days elapsed since creation or days elapsed in current state.	Invoice Reports	VSTS Admin
All Reports Folders	Agentic AI Buyer Prioritization	This report highlights the prioritization of buyer invoices.	Cora AP Reports	VSTS Admin
All Folders	Agentic Al tagged Involces	This report highlights the invoice count gen- erated by AI	Cora AP Reports	VSTS Admin
Created by Me Shared with Me	Al Invoice Priority Ranking	This report highlights the prioritization of invoices.	Cora AP Reports	VSTS Admin
Favorites	Al Invoice Work Items Prioritization	This report highlights the prioritization of	Cora AP Reports	VSTS Admin

The Invoice Insights dashboard contains the intuitive charts for the standard reports. To view the dashboard, follow the steps below:

- 1. Log in to the Salesforce as an admin.
- 2. Click the App Launcher (grid icon) in the top-left corner.

3. Search for and select Dashboards >> All Folders >> Invoice Dashboard >>Invoice Insights.

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You can add the Invoice Insights reports dashboard to the Home page for quick access.

Add a dashboard to Home page for quick access

- 1. Log in to the Salesforce.
- 2. Click on the App Launcher (grid icon) in the top-left.
- 3. Select Home.
- 4. On the Home page, click the **gear icon** (۞) in the top-right corner.
- 5. Select Edit Page to open the Lightning App Builder.
- 6. In the Lightning App Builder, locate the Components panel on the left.
- 7. Scroll down and find the **Dashboard** component.
- 8. Drag and drop the **Dashboard** component onto the desired section of the Home page.
- 9. In the component settings on the right panel, click **Select Dashboard**.
- 10. Search for and choose the dashboard Invoice Insights.

