

Dashboard and Managing List View

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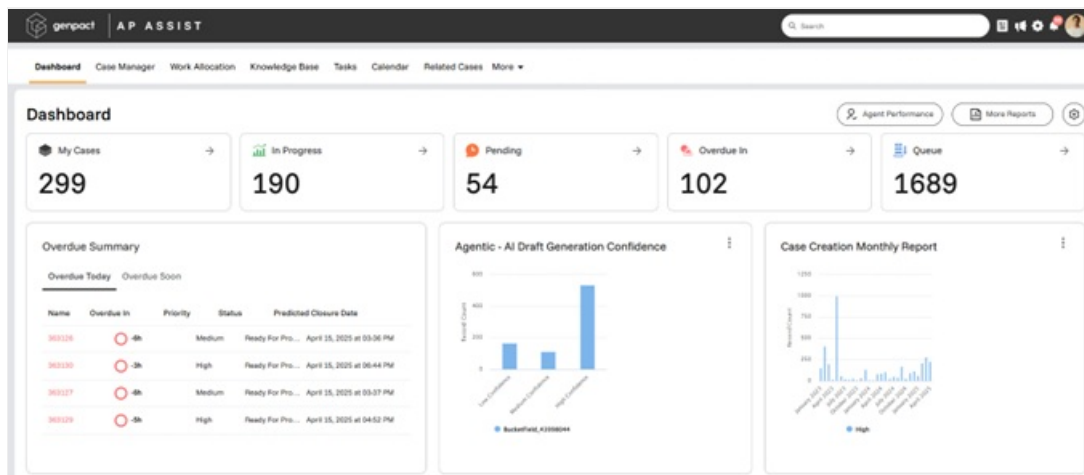
V1.1

Dashboard page

The dashboard offers an industry-standard modern experience designed for efficiency and ease of use. A user enjoys a refined and intuitive user interface, ensuring seamless navigation and instant access to critical insights.

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

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

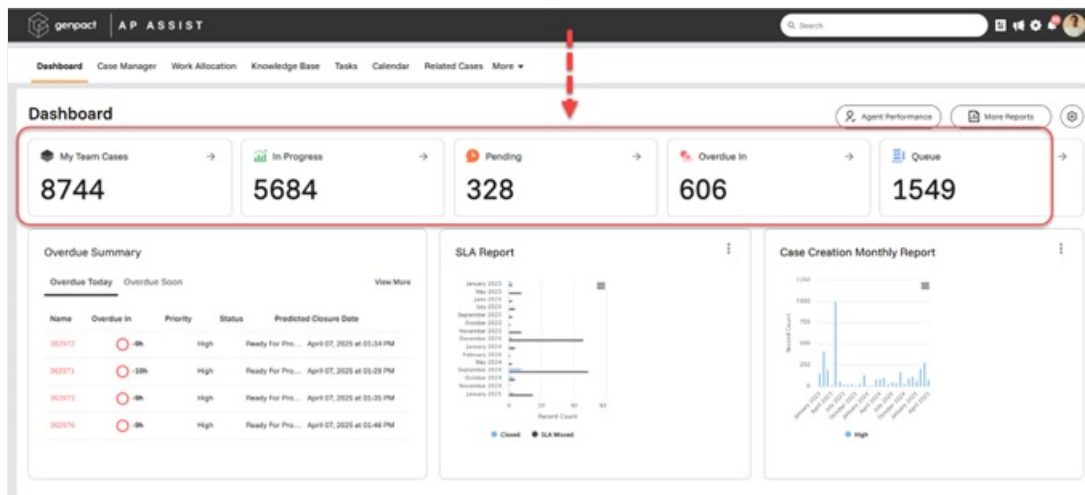


Key highlights

Dashboard Queue cards

offers configurable dashboard queue cards, that are designed for seamless access to essential work items. For example, you can create queues for:

- My Team Cases
- In Progress Cases
- Pending Cases
- Overdue In
- Cases in Queue



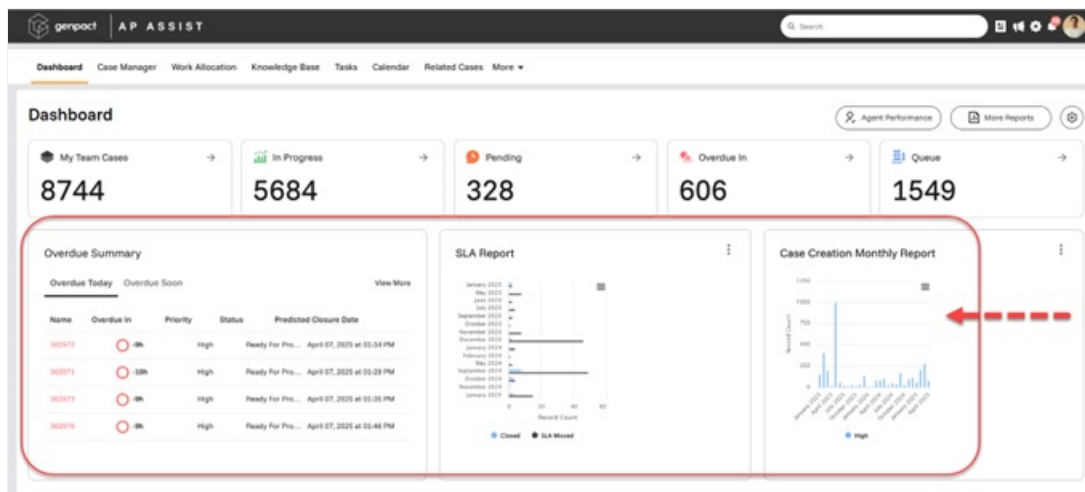
Dashboard Charts and Reports

You can transform raw data into actionable insights with responsive charts tailored for buyers. The interactive, one-click drill-down charts provide an intuitive navigation experience, making data analysis effortless. You can stay informed, track key metrics, and make data-driven decisions with dynamic visualizations right from the dashboard.

charts are fully configurable, allowing you to create, modify, and customize visualizations based on your specific requirements.

Example

- Overdue Summary
- SLA Report
- Case Creation Monthly Report



[Link to Agent Performance data insights](#)

<<screen>>

For complete setup instructions, refer to the [AP Assist User Guide.docx](#).

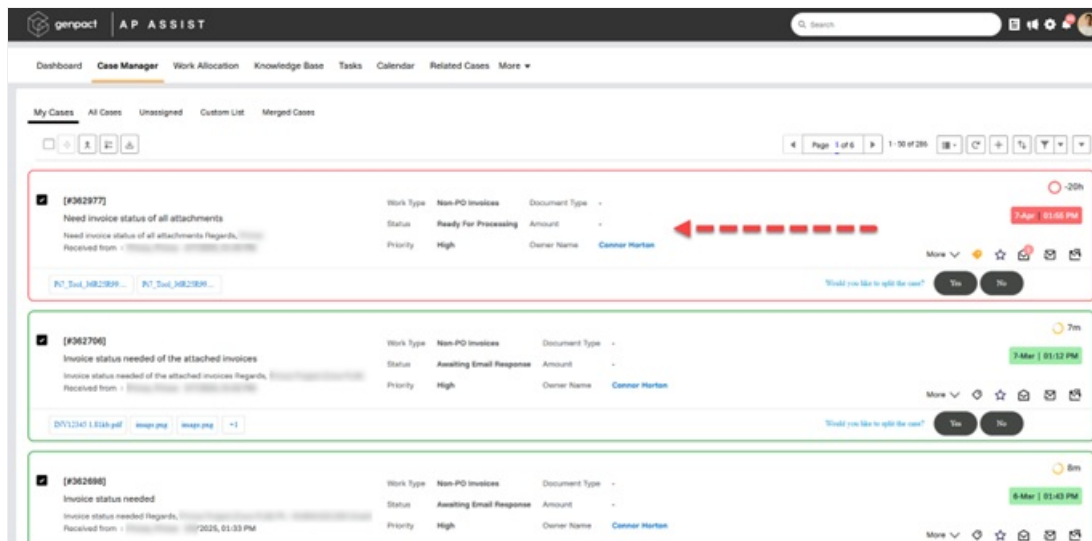
[Case Manager List View page](#)

The Case Manager List View page is designed to deliver a modern, responsive, and user-centric interface to transform the way users interact with invoice data.

It introduces a highly visual, action-driven experience that blends responsive design with practical functionality. From real-time filtering and bulk operations to intuitive tile-based layouts and streamlined pop-ups, this interface empowers users to view, manage, and act on invoices with speed and precision.

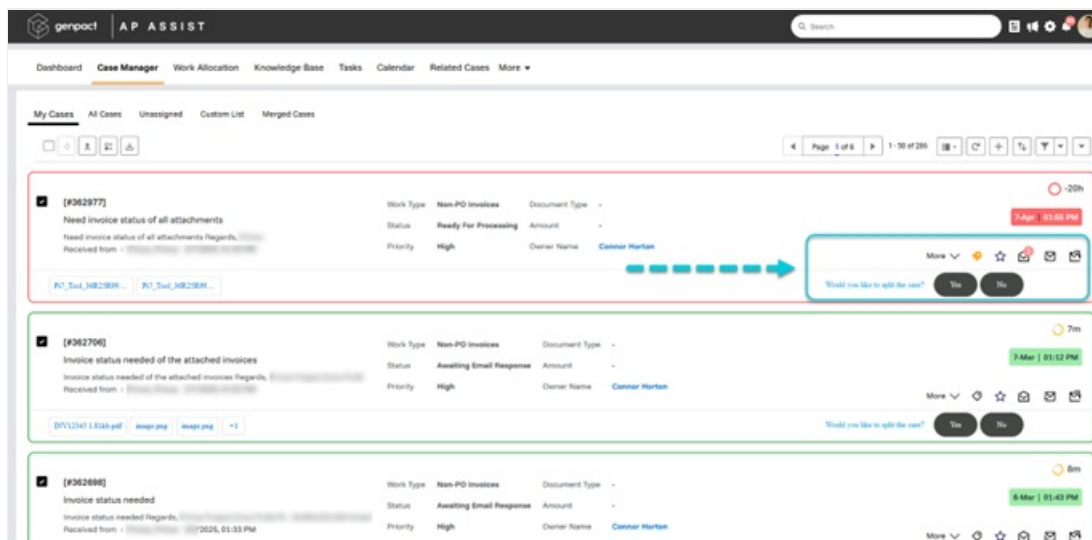
Column-based layout

A clean and organized column-based layout with clearly aligned headers improves data readability. Each row displays vital information.



Action icons on Case Tile

The Case tiles contain action icons like Read/Unread, Tags, Reply and more, for quick actions to be performed on a case.



Tabs

The Case Manager List View page displays tabs prominently for quick switching between invoice categories or views. A **More** dropdown ensures less common tabs remain accessible without crowding the interface.

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Dashboard Case Manager Work Allocation Knowledge Base Tasks Calendar Related Cases More

My Cases All Cases Unassigned Custom List Merged Cases

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[#362977] Need invoice status of all attachments
Received from: [redacted]
Work Type: Non-PO Invoices
Status: Ready For Processing
Priority: High
Owner Name: Connor Horton
7-Apr | 01:05 PM
More [redacted] [redacted] [redacted] [redacted] [redacted] [redacted]
Would you like to split the case? Yes No

[#362706] Invoice status needed of the attached invoices
Received from: [redacted]
Work Type: Non-PO Invoices
Status: Awaiting Email Response
Priority: High
Owner Name: Connor Horton
7-Mar | 01:12 PM
More [redacted] [redacted] [redacted] [redacted] [redacted] [redacted]
Would you like to split the case? Yes No

[#362686] Invoice status needed
Received from: [redacted] 2025, 01:33 PM
Work Type: Non-PO Invoices
Status: Awaiting Email Response
Priority: High
Owner Name: Connor Horton
8-Mar | 01:43 PM
More [redacted] [redacted] [redacted] [redacted] [redacted] [redacted]
Would you like to split the case? Yes No

For complete setup instructions, refer to the [AP Assist User Guide.docx](#).