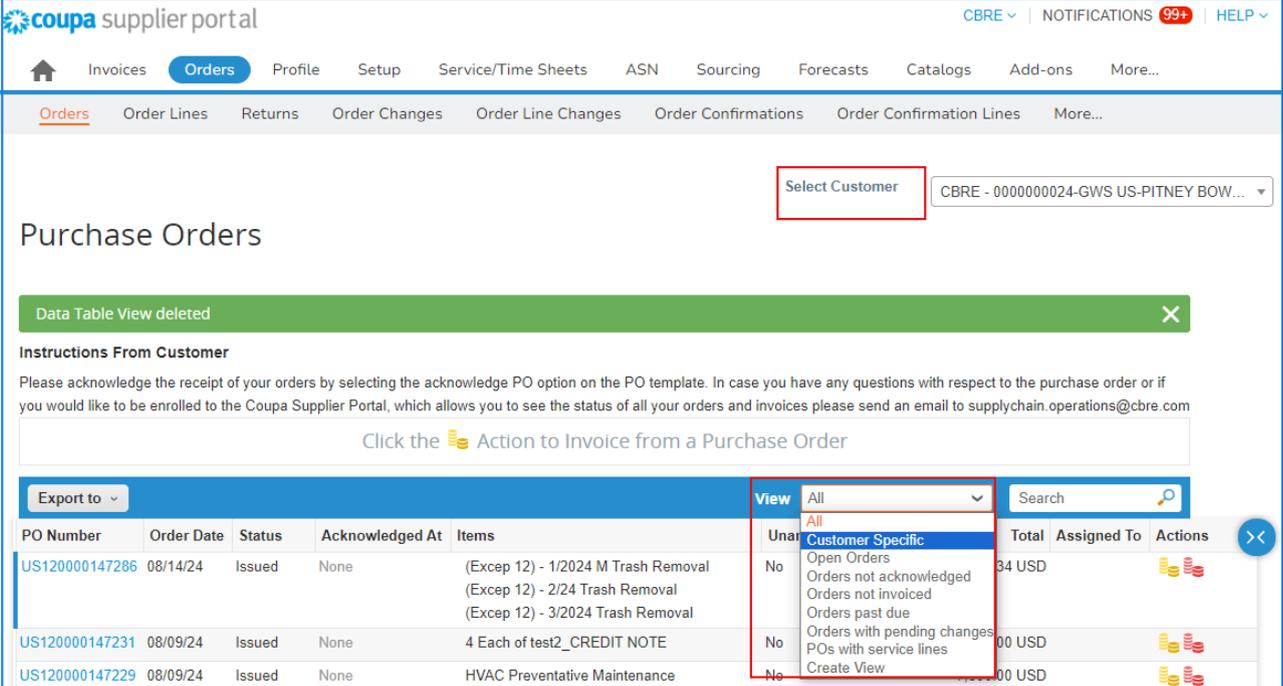


How to create a purchase order view

These steps will outline how to create views on the Coupa Supplier Portal.

1. Go to Coupa Supplier Portal <http://supplier.coupahost.com/>
2. From the Main Menu, select the **Orders Tab**. Select your CBRE customer from the **Select Customer** drop down, then select **Create View** in the View dropdown.

Note: Views are created by customer selected.



The screenshot shows the Coupa Supplier Portal interface. At the top, there's a navigation bar with 'coupa supplier portal' on the left and 'CBRE', 'NOTIFICATIONS 99+', and 'HELP' on the right. Below this is a main menu with 'Orders' highlighted. A 'Select Customer' dropdown is set to 'CBRE - 0000000024-GWS US-PITNEY BOW...'. The main content area is titled 'Purchase Orders'. There's a green notification bar that says 'Data Table View deleted'. Below that is an 'Instructions From Customer' section with a link to 'Action to Invoice from a Purchase Order'. At the bottom, there's a table of purchase orders with columns for 'PO Number', 'Order Date', 'Status', 'Acknowledged At', 'Items', 'View', 'Total', 'Assigned To', and 'Actions'. A 'View' dropdown menu is open, showing options like 'All', 'Customer Specific', 'Open Orders', 'Orders not acknowledged', 'Orders not invoiced', 'Orders past due', 'Orders with pending changes', 'POs with service lines', and 'Create View'.

3. There are four parts to creating a view.
 - a. **General**- Add in a view Name, select your visibility, and select Start view with All
 - b. **Conditions**- these are your match conditions and filters for the view/report
 - c. **Columns**- these will differ based on the tab you are in. Here you can add and remove data by dragging and dropping the data field name.
 - d. **Default Sort**- you can predefine how you want your view to sort
4. Select Save when you have completed your selections

Select Customer CBRE - 000000023-GWS US-8X8 INC

Create New data table view

General

Name

Visibility Only Me
 Everyone

Start with view All

Conditions

Match Conditions Match all conditions Add group of conditions

Filter By PO Number Filter Clause is Filter Text

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order. You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns	Selected Columns
Acknowledged At	Client Name
Payment Agreements	PO Number
PO Description	Order Date
PO ID	Status
Assigned To	Items
Unanswered Comments	Comments
	Total
	Actions

Default Sort Order

Sort by in ascending order.

Cancel Save

5. You will receive a message that your view has been created.

Purchase Orders

View created
✕

Instructions From Customer

Please acknowledge the receipt of your orders by selecting the acknowledge PO option on the PO template. In case you have any questions with respect to the purchase order or if you would like to be enrolled to the Coupa Supplier Portal, which allows you to see the status of all your orders and invoices please send an email to supplychain.operations@cbre.com

Click the Action to Invoice from a Purchase Order

Export to View Client View Name Search

Client Name	PO Number	Order Date	Status	Items	Comments	Total	Actions