

Coupa Supplier Portal User Guide

How to create custom views

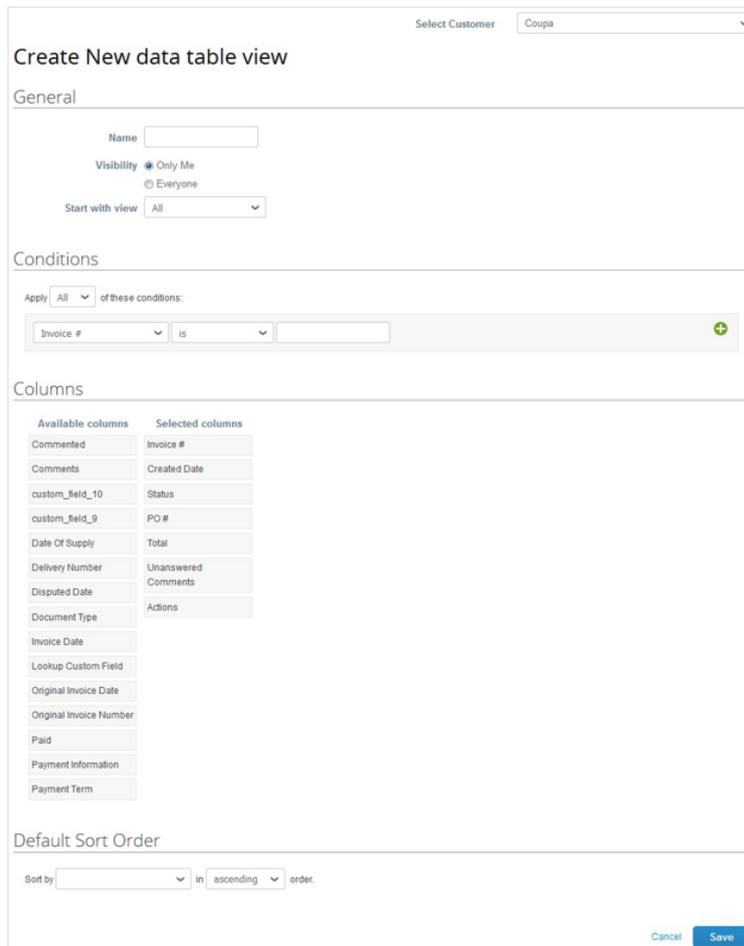


Create Custom Views

You can create custom views for orders, order lines, order changes, order line changes, service/time sheets, service/ time sheet lines, advance ship notices (ASN), invoices, and catalogues.

With a custom view you can create a set of advanced search filters.

1. On the main menu, click on the tab for the function for which you want to create a custom view.
2. At the top of the table whose view you want to change, click Create View in the View drop-down list.
3. On the Create New data table view page, select the customer for whom you want to change the view settings, and then specify the settings you want to use for your custom view, including filtering conditions, columns to include, and sorting criteria.



Select Customer Coupa

Create New data table view

General

Name

Visibility Only Me Everyone

Start with view All

Conditions

Apply All of these conditions:

Invoice # is

Columns

Available columns	Selected columns
Commented	Invoice #
Comments	Created Date
custom_field_10	Status
custom_field_9	PO #
Date Of Supply	Total
Delivery Number	Unanswered
Disputed Date	Comments
Document Type	Actions
Invoice Date	
Lookup Custom Field	
Original Invoice Date	
Original Invoice Number	
Paid	
Payment Information	
Payment Term	

Default Sort Order

Sort by in ascending order.

Cancel Save

If you want to build this view based on another view and modify those settings, use the Start with view option under the General settings.

You can use the following settings when creating or editing a custom view for a CSP table.

Group	Setting	Description
General	Name	Name of the custom view, visible from the View drop-down list at the top of the table.
	Visibility	Defines whether this view can be visible to only you or all the other users that can see the main table.
	Start with view	Use this option to load the settings from another view, and then modify those settings to fit your needs for this view.
Conditions	Apply	All - Displays results only for objects that meet all of the conditions you add in this list. Any - Displays results for objects that meet at least one of the conditions you add in this list.
	Conditions	Create conditions based on the data available in the CSP.
Columns	Available Columns	This list depends on the table you work with in the CSP. You can select any of these columns to add to your custom view.
	Selected Columns	These are all the columns displayed in this custom view. They appear from left to right, in the same order that you set them up here.
Default Sort Order	Choose the column by which you want results to be sorted and define whether to sort them in ascending or descending order.	

Save your settings.

To delete a custom view, open the view for editing by clicking on the Edit View (✎) icon and click on the Delete (✖) button at the bottom of the page.

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