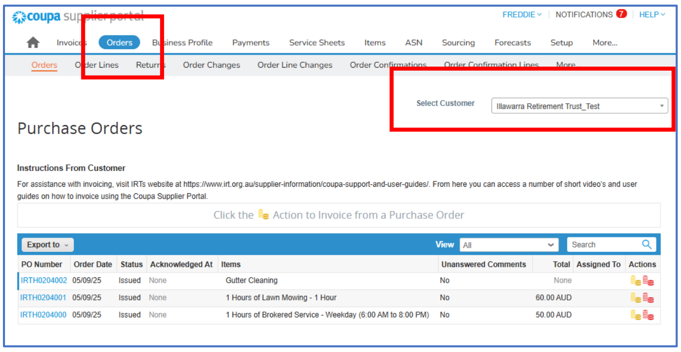
COUPA SUPPLIERS
QUICK REFERENCE GUIDE

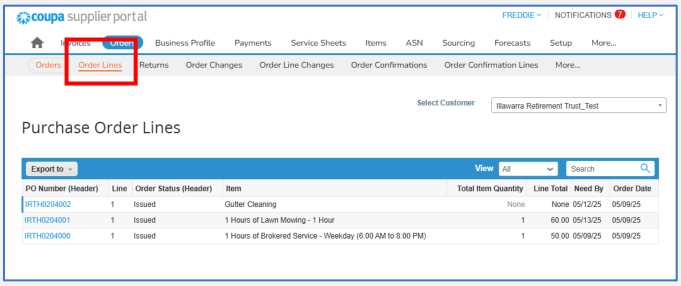
HOW TO CREATE A CUSTOM VIEW IN THE COUPA SUPPLIER PORTAL TO SHOW CLIENT INFORMATION AND NEED BY DATE ON IRT PURCHASE ORDERS (PO'S).
INCREASE THE ZOOM TO VIEW THE SCREENSHOTS CLEARLY.

The below information will guide you through the requirements to set up a view in the Coupa Supplier Portal to assist you with managing and invoicing your IRT PO's, in particular viewing client information and need by date. There are 10 steps that should only take you approximately 5 minutes to complete.

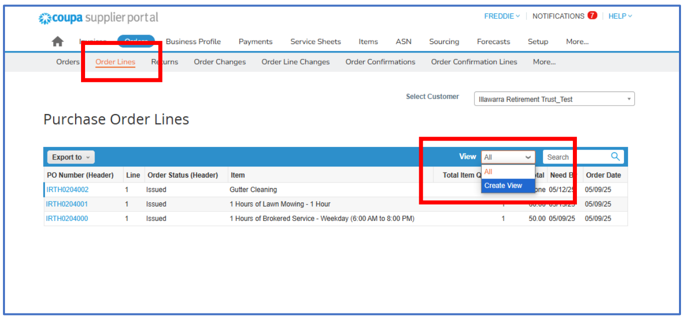


Step 1
In your Coupa Supplier Portal, click on the "Orders" tab and make sure the "Selected Customer" field is Illawarra Retirement Trust.

This will show you a list of all the POs IRT has issued to you.



Step 2
Click on the "Order Lines" tab.



Step 3
Locate the "View" drop down and select the down arrow icon, then select "Create View".

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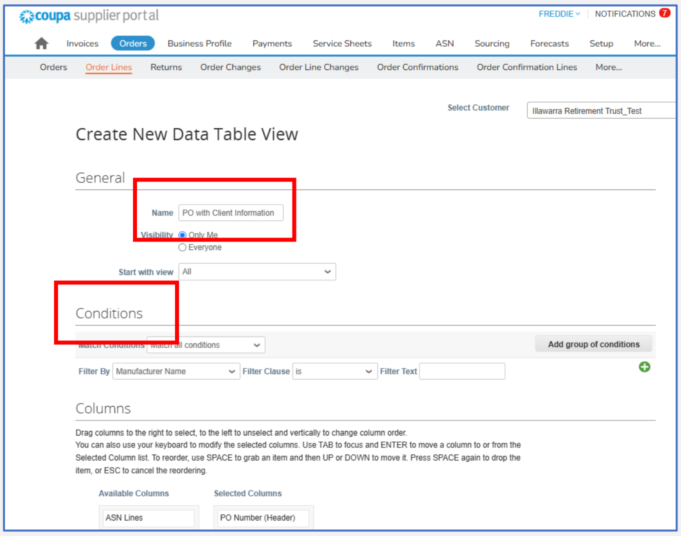
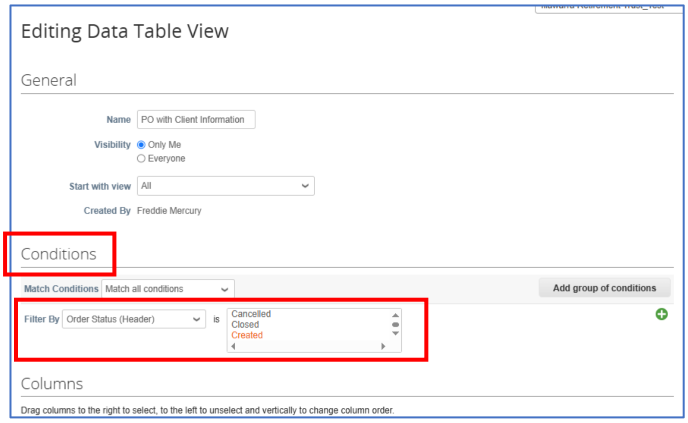


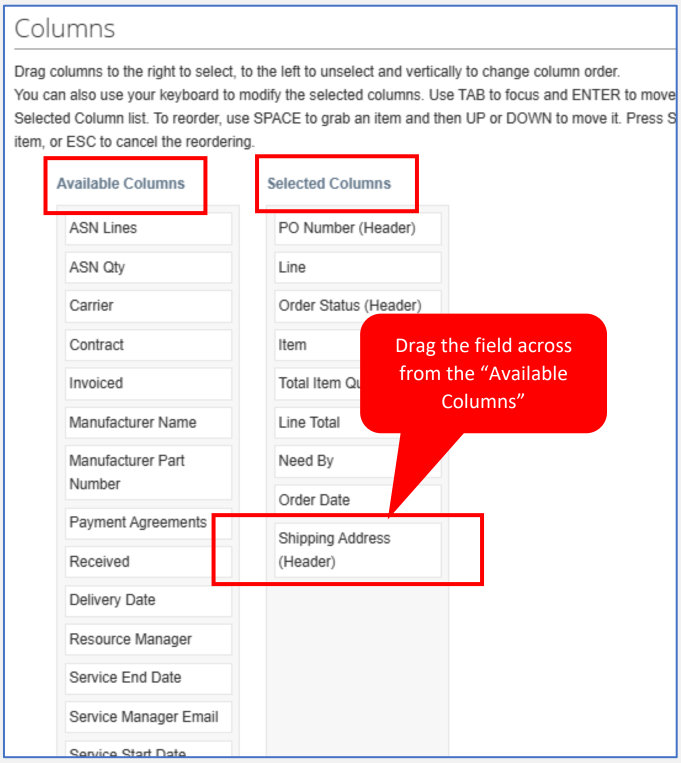
Step 4
Name the view and scroll down to the "Conditions" section.



Step 5
Once you're in the "Conditions" section, "Filter By" Order Status (Header) and select "Created". This ensures the list only displays open PO's.

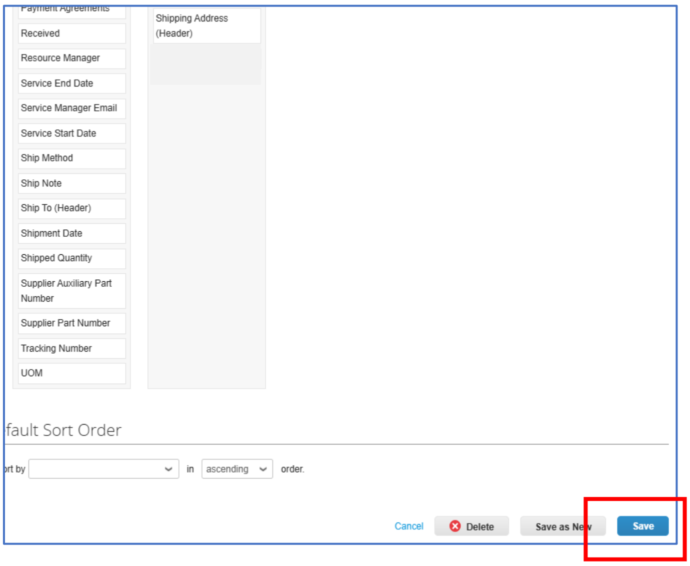
You can skip this step if you want to view all IRT PO's.

Scroll down to the "Columns" section

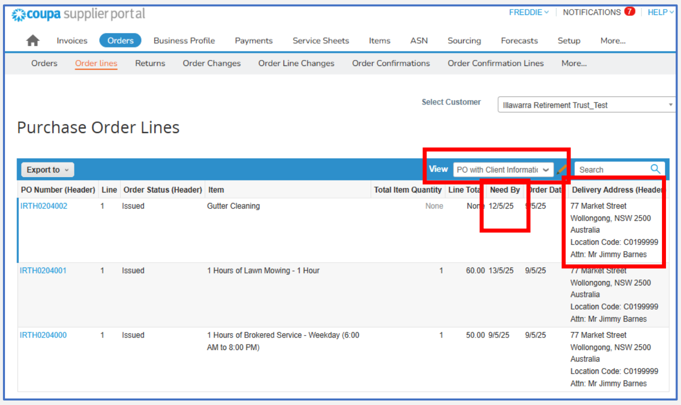


Step 6
Once you're in the “Columns” section, locate “Shipping Address (Header)” under “Available Columns” and drag it to the “Selected Columns” list.

You can add or remove other fields as needed by dragging them between the two columns.

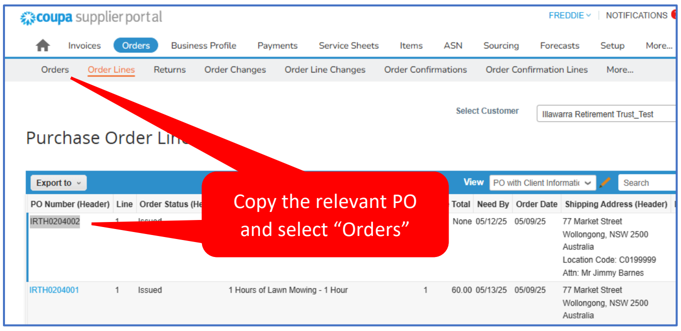


Step 7
Scroll down and select “Save”.



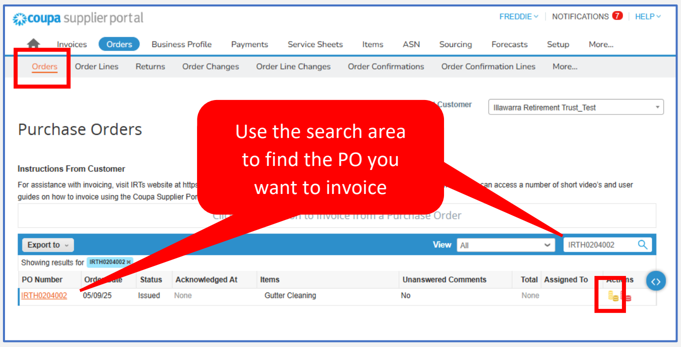
Step 8

You now have a view that provides the Home Care client information and the "need by" date.



Step 9

To invoice against the purchase order, take note (or copy) of the PO number and select the "Orders" tab



Step 10

Once in the "Orders" tab, paste or type the purchase order number into the search bar to find the correct purchase order to invoice.

Select the gold coins icon to turn the purchase order into an invoice.

For more information on how to invoice, follow the user guide found at the following link - [Coupa Support and User Guides - IRT]