


Creating Reports/Custom Views

Creating a Report/Custom View for Invoices/Orders

- a) Click on “Invoices” or “Orders” tab (the page opens in the report/views format)
- b) Click on drop down menu next to the “View” 
- c) Select “Create View” option
- d) Enter a meaningful name that describes the report/view
- e) Select “Visibility” depending upon if you want the report/view to available just for you or for “everyone” setup as a user in the CSP
- f) In the “Conditions” section, add and select conditions that you want for the report/view (Optional)
- g) In the “Columns” section, drag & drop fields that you want in your report/view from the “Available Columns” to “Selected Columns” (Optional)
- h) In the “Default Sort Order” section, select a field from the given options that you want to use to sort your report/view in an ascending or descending order (Optional)
- i) Click “Save” to save your report

Coupa Link:

<https://supplier.coupa.com>

Support Email:

B2B.Support@nal.ca

Tips:

- ✓ Coupa calls “Reports” as “Views”
- ✓ Before selecting “Everyone” in the “Visibility”, check with everyone if they wish to see the report or not
- ✓ Only create reports that you wish to see regularly

Coupa Custom View Page: https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Get_Started_with_the_CSP/Create_Custom_Views

Coupa Support Videos: https://success.coupa.com/Suppliers/For_Suppliers/Coupa_Supplier_Portal/Get_Started_with_the_CSP/02_CSP_Videos