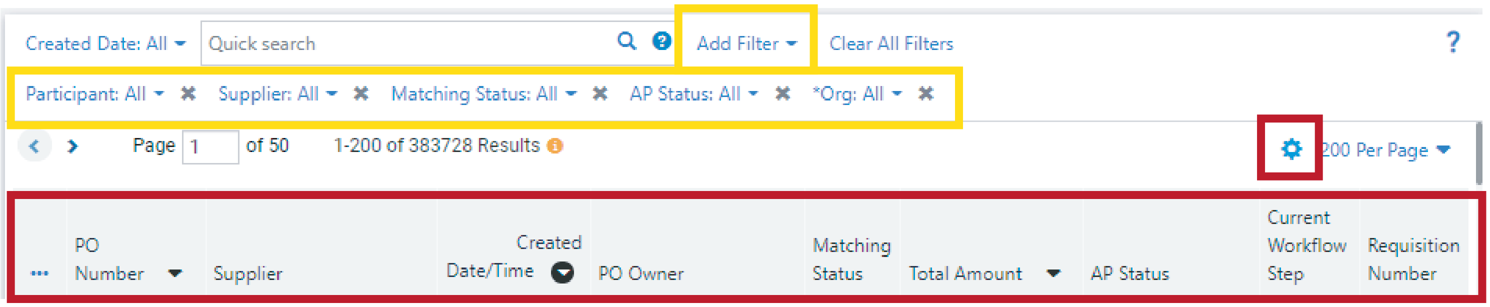
How to Set **Filters** and **Columns** Defaults

Below is an example of how setting the **filters** and **columns** work together. This example shows how the **columns** are **set** to display all the data for PO's, if the PO is open and if it has been in-voiced.

This now can be **filtered** to **show**:

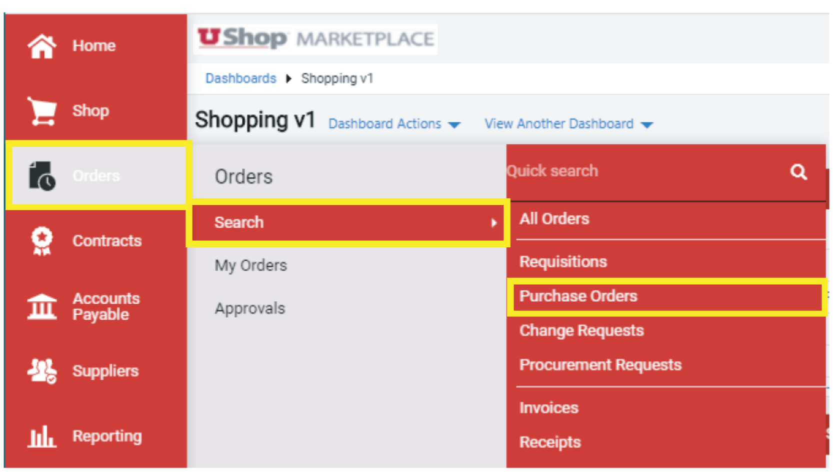
- Information for a **participant** (me, or anyone else that is typed in their field)
- **Supplier**
- **Matching** status: Fully Matched —Partially Matched —No Matches
- AP Status — PO **Opened** or PO **Closed**
- **Org**
- Many other filters are available (this image below is an example)



To Set **Columns:**

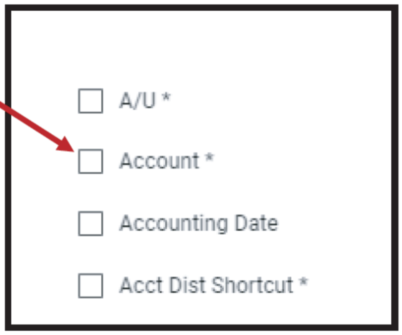
1. Click on:

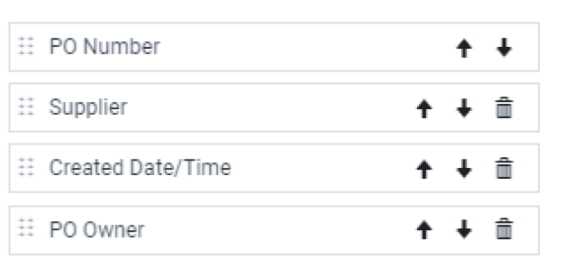
- Orders
- Search
- Purchase Orders



2. Adjust **Columns:**

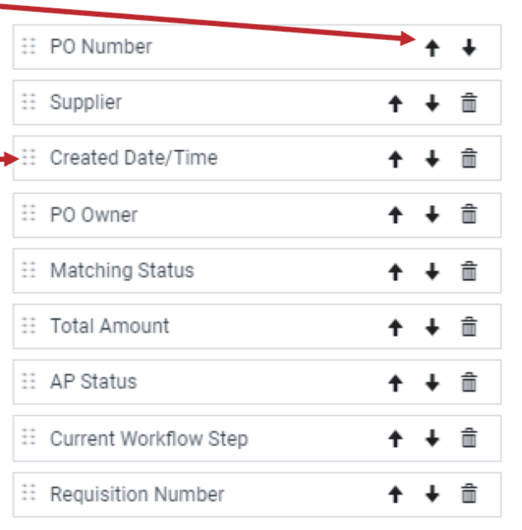
3. Scroll through available **Columns** on the Left and click the Box(s) next to the columns to display on the PO search screen.





4. Use the Up & Down Arrows to adjust the order of the **Columns**

* OR use the Dots Icon to Click and Drag the items to change the order



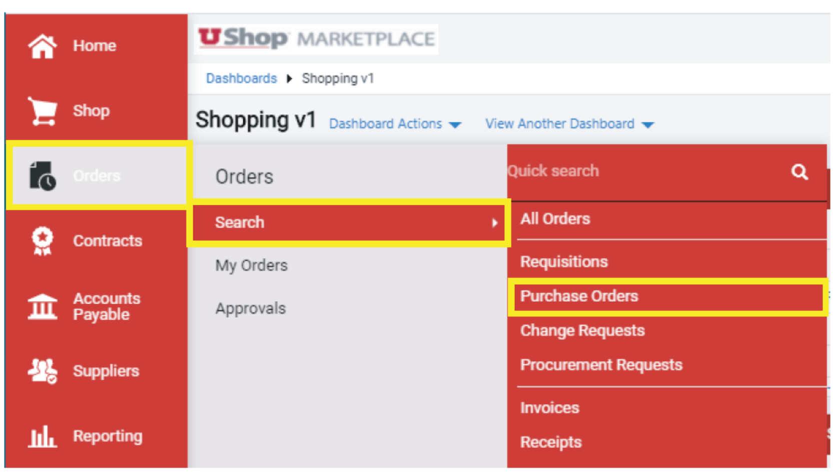
5. When the Columns are in the desired order Click **Pin** Columns

6. Click **Apply**

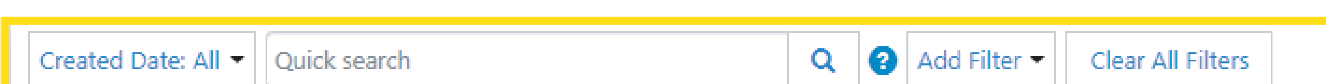
To Set **Filters:**

1. Click on:

- Orders
- Search
- Purchase Orders

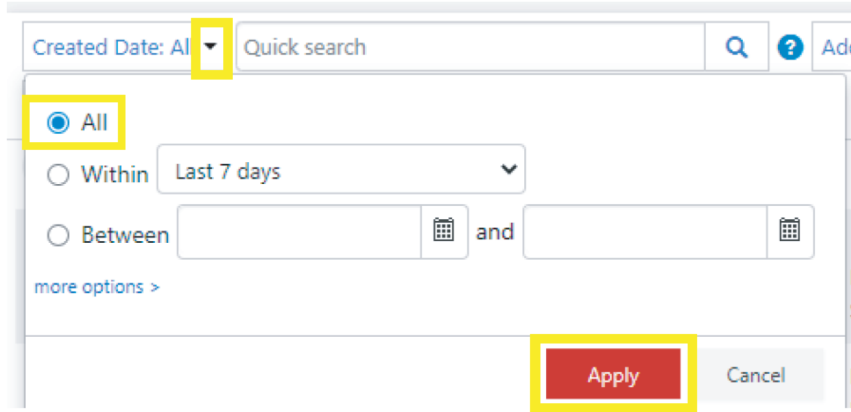


2. Adjust **Filters:**



A. Click the drop down next to Create Date:

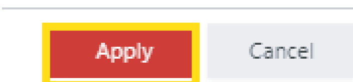
- Click the Radio Button All (or whatever date range best fits your needs)
- Click Apply

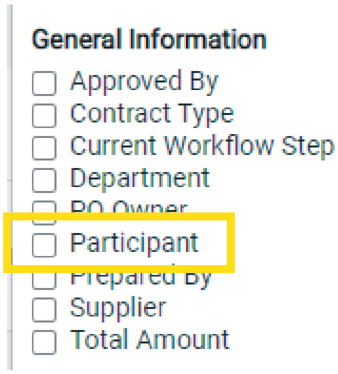


B. Click Add **Filter**

C. Scroll to General Information

- Click On **Participant** (for example)
- Type in Name of a person who participated in the transaction
- Click Apply

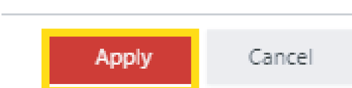


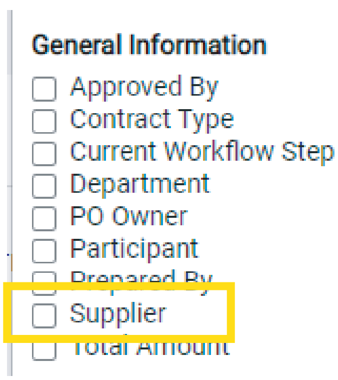


D. To add an additional Filter Click:

- Add **Filter**

- Scroll to and click **Supplier** (as another example)
- Click Apply





E. Continue per above to add as many filters as desired then move to **Pin Filters** below.

F. To save Filters for future:

- Go to Pin Filters **Drop Down**
- Click **Pin** Filters