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**:

   - Created Date: All
   - Quick search
   - Add Filter
   - Clear All 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
   - 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