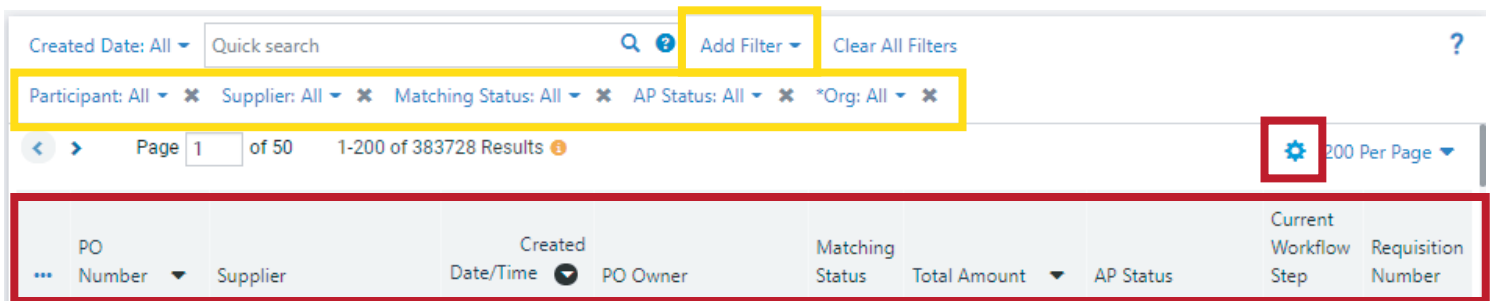


How to Set **Filters** and **Columns** Defaults

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)

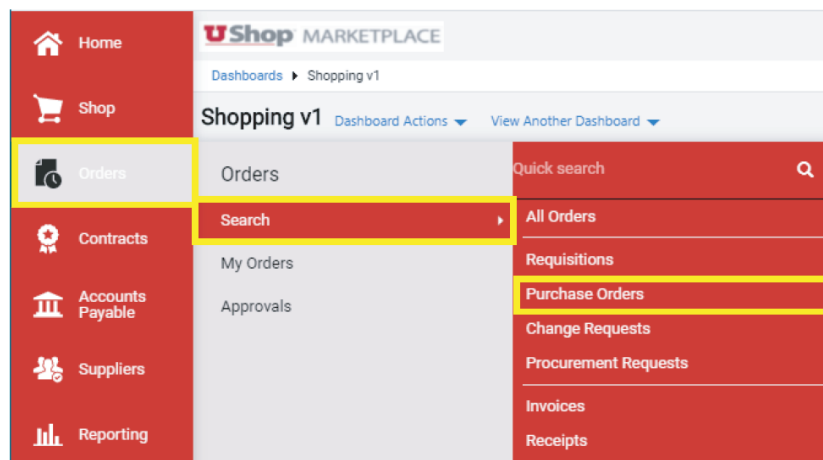


The screenshot shows the UShop Marketplace search interface. At the top, there is a search bar with a 'Quick search' placeholder and a magnifying glass icon. To the right of the search bar are buttons for 'Add Filter' and 'Clear All Filters'. Below the search bar, a row of filters is displayed: 'Participant: All', 'Supplier: All', 'Matching Status: All', 'AP Status: All', and '*Org: All'. Each filter has a dropdown arrow and a close icon. Below the filters, there is a pagination bar showing 'Page 1 of 50' and '1-200 of 383728 Results'. To the right of the pagination bar is a settings icon (gear) and a dropdown menu showing '200 Per Page'. Below the pagination bar, a table of columns is displayed, including 'PO Number', 'Supplier', 'Created Date/Time', 'PO Owner', 'Matching Status', 'Total Amount', 'AP Status', 'Current Workflow Step', and 'Requisition Number'.

To Set **Columns**:

1. Click on:

- Orders
- Search
- Purchase Orders



The screenshot shows the UShop Marketplace dashboard. On the left, there is a navigation menu with icons and labels for 'Home', 'Shop', 'Orders', 'Contracts', 'Accounts Payable', 'Suppliers', and 'Reporting'. The 'Orders' menu item is highlighted. In the center, there is a 'Shopping v1' dashboard section with a 'Search' button and a dropdown menu showing 'All Orders', 'Requisitions', 'Purchase Orders', 'Change Requests', 'Procurement Requests', 'Invoices', and 'Receipts'. The 'Purchase Orders' option is highlighted. On the right, there is a search bar with a 'Quick search' placeholder and a magnifying glass icon.

2. Adjust **Columns**:



The screenshot shows a settings icon (gear) and a dropdown menu showing '200 Per Page'.

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

☐ A/U *

☐ Account *

☐ Accounting Date

☐ Acct Dist Shortcut *

PO Number

↑ ↓

Supplier

↑ ↓

🗑

Created Date/Time

↑ ↓

🗑

PO Owner

↑ ↓

🗑

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

PO Number

↑ ↓

Supplier

↑ ↓

🗑

Created Date/Time

↑ ↓

🗑

PO Owner

↑ ↓

🗑

Matching Status

↑ ↓

🗑

Total Amount

↑ ↓

🗑

AP Status

↑ ↓

🗑

Current Workflow Step

↑ ↓

🗑

Requisition Number

↑ ↓

🗑

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

☐ Pin Columns as my defaults

6. Click **Apply**

Apply

Cancel

To Set **Filters**:

1. Click on:

- Orders
- Search
- Purchase Orders

Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Reporting

UShop MARKETPLACE

Dashboards > Shopping v1

Shopping v1

Dashboard Actions

View Another Dashboard

Orders

Search

My Orders

Approvals

Quick search

All Orders

Requisitions

Purchase Orders

Change Requests

Procurement Requests

Invoices

Receipts

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

This screenshot shows the 'Created Date' filter dropdown menu. The 'All' radio button is selected and highlighted with a yellow box. Other options include 'Within Last 7 days' and 'Between' with date pickers. The 'Apply' button is also highlighted with a yellow box.

B. Click Add **Filter**

The 'Add Filter' button is shown with a yellow box around the dropdown arrow.

C. Scroll to General Information

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

The 'Apply' button is highlighted with a yellow box.

This screenshot shows the 'General Information' filter section. The 'Participant' checkbox is highlighted with a yellow box. To the right, a search box for 'Participant' is also highlighted with a yellow box.

D. To add an additional Filter Click:

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

The 'Apply' button is highlighted with a yellow box.

This screenshot shows the 'General Information' filter section. The 'Supplier' checkbox is highlighted with a yellow box.

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**

This screenshot shows the 'Pin Filters' dropdown menu. The 'Pin Filters' option is highlighted with a yellow box. Other options include 'Remove Pinned Filters', 'Pin Columns', and 'Remove Pinned Columns'.