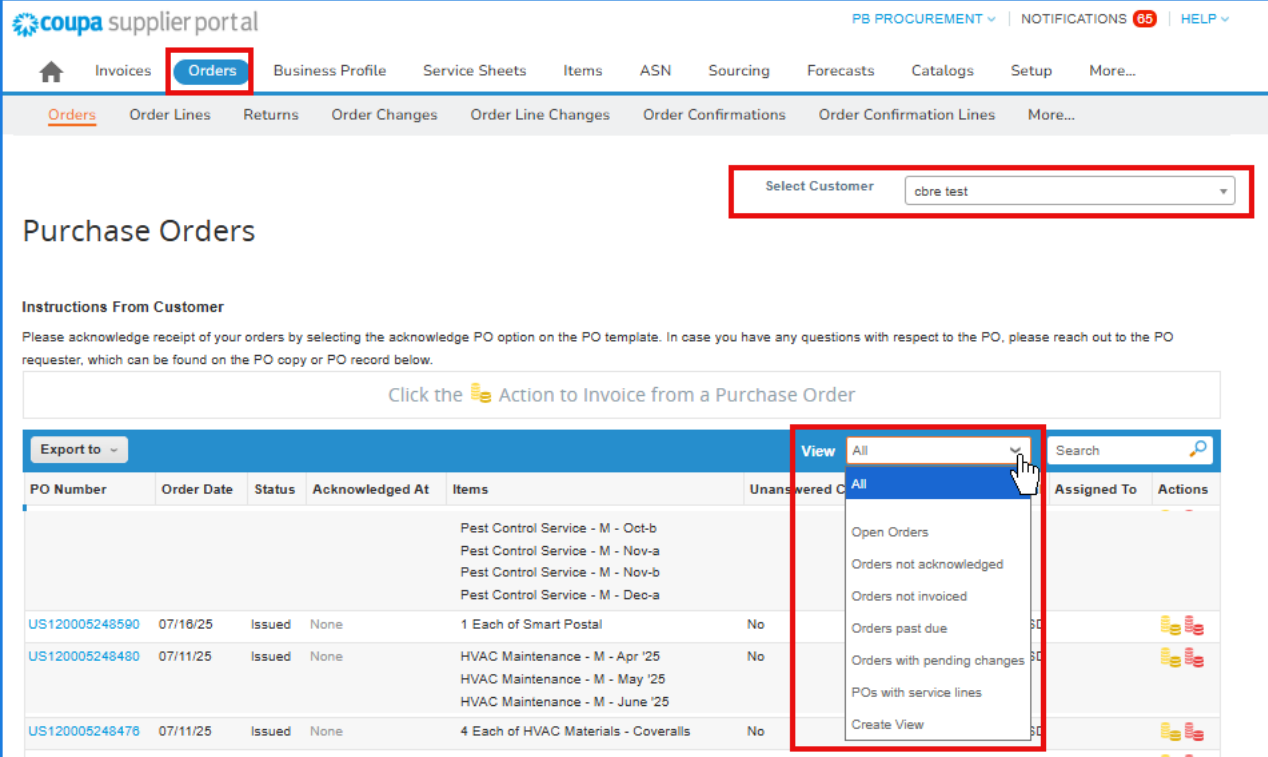


How to create a purchase order view

These steps will outline how to create views on the Coupa Supplier Portal.

1. Go to Coupa Supplier Portal <http://supplier.coupahost.com/>
2. From the Main Menu, select the **Orders Tab**. Select your CBRE customer from the **Select Customer** drop down, then select **Create View** in the View dropdown.

Note: Views are created by customer selected.



The screenshot shows the Coupa Supplier Portal interface. At the top, there is a navigation bar with 'coupa supplier portal' on the left and 'PB PROCUREMENT', 'NOTIFICATIONS 65', and 'HELP' on the right. Below this is a main menu with 'Invoices', 'Orders' (highlighted with a red box), 'Business Profile', 'Service Sheets', 'Items', 'ASN', 'Sourcing', 'Forecasts', 'Catalogs', 'Setup', and 'More...'. Underneath the main menu is a sub-menu with 'Orders', 'Order Lines', 'Returns', 'Order Changes', 'Order Line Changes', 'Order Confirmations', 'Order Confirmation Lines', and 'More...'. In the center, there is a 'Select Customer' dropdown menu with 'cbre test' selected, also highlighted with a red box. Below this is the 'Purchase Orders' section. It includes 'Instructions From Customer' and a table of purchase orders. A 'View' dropdown menu is open over the table, showing options: 'All', 'All', 'Open Orders', 'Orders not acknowledged', 'Orders not invoiced', 'Orders past due', 'Orders with pending changes', 'POs with service lines', and 'Create View'. The 'Create View' option is highlighted with a red box and a mouse cursor.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered C	Assigned To	Actions
				Pest Control Service - M - Oct-b			
				Pest Control Service - M - Nov-a			
				Pest Control Service - M - Nov-b			
				Pest Control Service - M - Dec-a			
US120005248590	07/18/25	Issued	None	1 Each of Smart Postal	No		
US120005248480	07/11/25	Issued	None	HVAC Maintenance - M - Apr '25 HVAC Maintenance - M - May '25 HVAC Maintenance - M - June '25	No		
US120005248476	07/11/25	Issued	None	4 Each of HVAC Materials - Coveralls	No		

3. There are four parts to creating a view.
 - a. **General**- Add in a view Name, select your visibility, and select Start view with All
 - b. **Conditions**- these are your match conditions and filters for the view/report
 - c. **Columns**- these will differ based on the tab you are in. Here you can add and remove data by dragging and dropping the data field name.
 - d. **Default Sort**- you can pre-define how you want your view to sort

4. Select **Save** when you have completed your selections.

Select Customer CBRE - 0000000923-GWS US-SX8 INC

Create New data table view

General

Name

Visibility Only Me Everyone

Start with view

Conditions

Match Conditions Add group of conditions

Filter By Filter Clause Filter Text

Columns

Drag columns to the right to select, to the left to unselect and vertically to change column order.
You can also use your keyboard to modify the selected columns. Use TAB to focus and ENTER to move a column to or from the Selected Column list. To reorder, use SPACE to grab an item and then UP or DOWN to move it. Press SPACE again to drop the item, or ESC to cancel the reordering.

Available Columns	Selected Columns
Acknowledged At	Client Name
Payment Agreements	PO Number
PO Description	Order Date
PO ID	Status
Assigned To	Items
Unanswered Comments	Comments
	Total
	Actions

Default Sort Order

Sort by in order.

Cancel Save

5. You will receive a message that your view has been created.

Purchase Orders

View created ✕

Instructions From Customer

Please acknowledge the receipt of your orders by selecting the acknowledge PO option on the PO template. In case you have any questions with respect to the purchase order or if you would like to be enrolled to the Coupa Supplier Portal, which allows you to see the status of all your orders and invoices please send an email to supplychain.operations@cbre.com

Click the Action to Invoice from a Purchase Order

Export to ▾ View Client View Name ▾

Client Name	PO Number	Order Date	Status	Items	Comments	Total	Actions

For more information or assistance, reach out to your Procurement Buyer Team.

Region & Line of Business	Support Email Contact
ADV & GWS APAC	APAC_ProcurementBuyerSupport@cbre.com
Corporate & US	usprocurement@cbre.com
GWS U.S. & Canada	GWSNAM_ProcurementBuyerSupport@cbre.com
GWS Latin America	LATAM_ProcurementBuyerSupport@cbre.com Chile, Panama, Peru, Costa Rica, Uruguay, Dominican Republic, Columbia, Argentina, Mexico
EMEA, Canada ACML	All CBRE Entities