

*Focusing on our core utility businesses*

# S2P Hub (Coupa): Contract Services Billing (CSB) Training Guide

## Supplier



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# Introduction to Contract Services

# Introduction to Contract Services

The intent of this manual is to provide step by step instructions for creating invoices using the Coupa Supplier Portal for Contract Services Billing.

Contract Services Billing is a system which allows Contractors to access an Internet Website and enter payment requests electronically.

# Current State vs. Future State

Current State	Future State
<p><b>System</b></p> <ul style="list-style-type: none"> <li>• Work order creation in SAP</li> <li>• Vendor added to the work-table</li> <li>• Vendor marked as ERS</li> <li>• Service Master in SAP</li> </ul> <p><b>Contractor IDs</b></p> <ul style="list-style-type: none"> <li>• Procurement submits contractor credentials request to SailPoint</li> </ul> <p><b>Purchase Order Creation</b></p> <ul style="list-style-type: none"> <li>• Once the vendor submits the invoice, a PO is created in SAP for Payment</li> </ul> <p><b>Attachments</b></p> <ul style="list-style-type: none"> <li>• Invoice and work order attachments in the CSWBS portal</li> </ul>	<p><b>System</b></p> <ul style="list-style-type: none"> <li>• Work order creation in SAP</li> <li>• Vendor added to the work-table</li> <li>• Vendor marked as ERS</li> <li>• Service Master in SAP and will integrate to S2P Hub (Coupa)</li> </ul> <p><b>Contractor IDs</b></p> <ul style="list-style-type: none"> <li>• Contractor can create new log ins within the S2P Hub (Coupa) supplier portal for invoicing needs</li> </ul> <p><b>Purchase Order Creation</b></p> <ul style="list-style-type: none"> <li>• After all approvals have taken place in S2P Hub (Coupa), the PO will integrate to SAP for payment</li> </ul> <p><b>Attachments</b></p> <ul style="list-style-type: none"> <li>• Invoice attachments will be in the S2P Hub (Coupa) supplier portal; work order attachments will be in CSWBS portal</li> </ul>

# Supplier: Coupa Supplier Portal (CSP) Overview

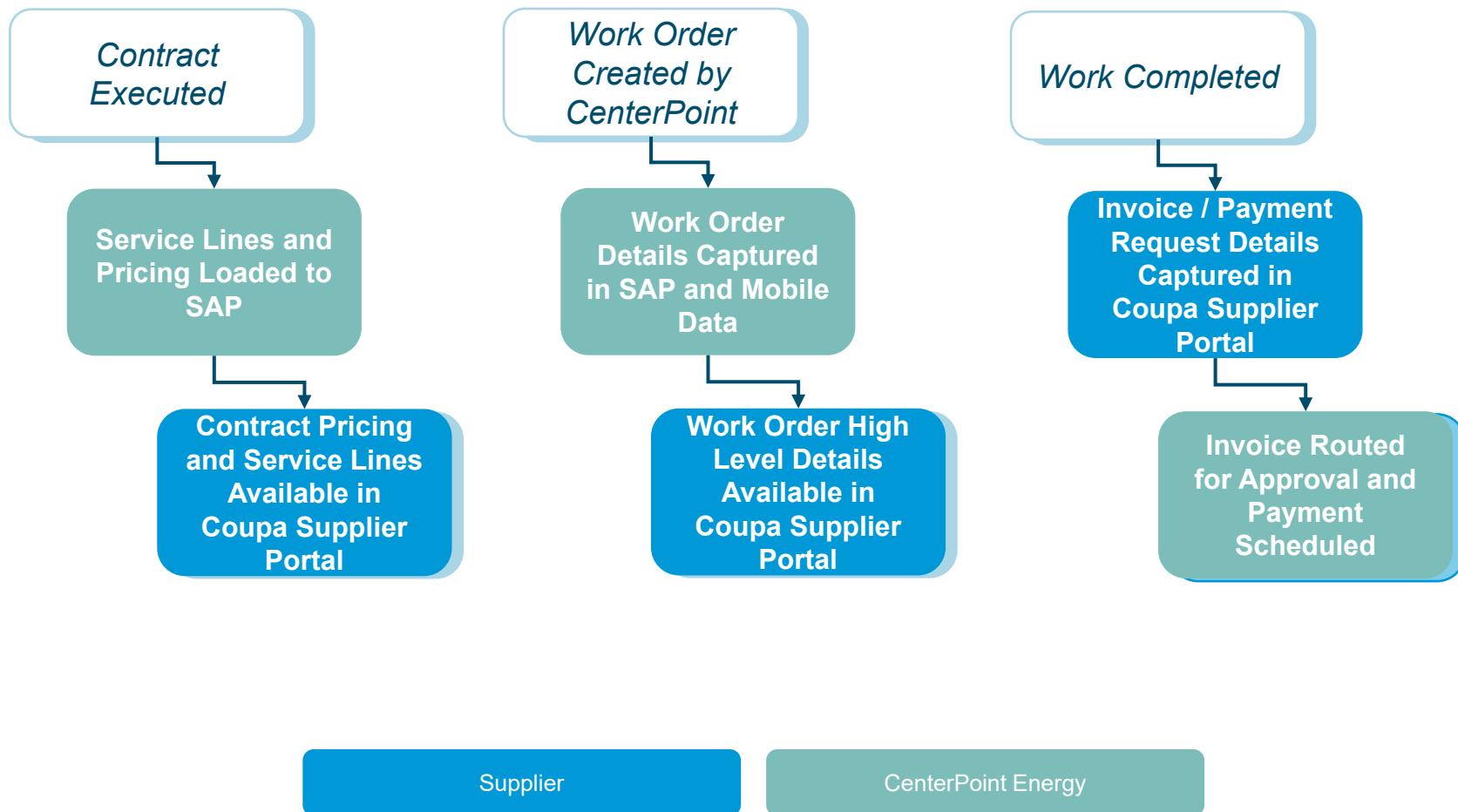
## Overview: Coupa Supplier Portal

The CSP is a free tool for you to easily do business with customers who use Coupa. Using the CSP, you can:

- Manage your company information
- Create Invoices
- Create Credit Memos
- Communicate regarding specific transactions



# High Level Process Flow





# Accepting an Invitation to the CSP

# Accepting an Invitation to the CSP

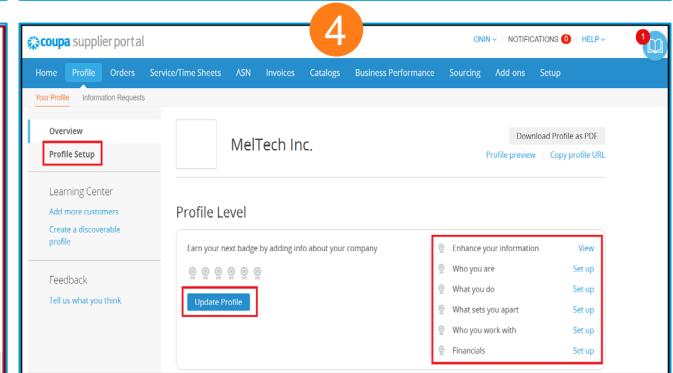
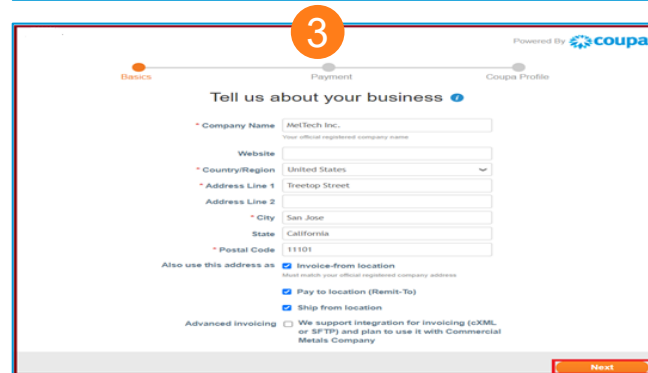
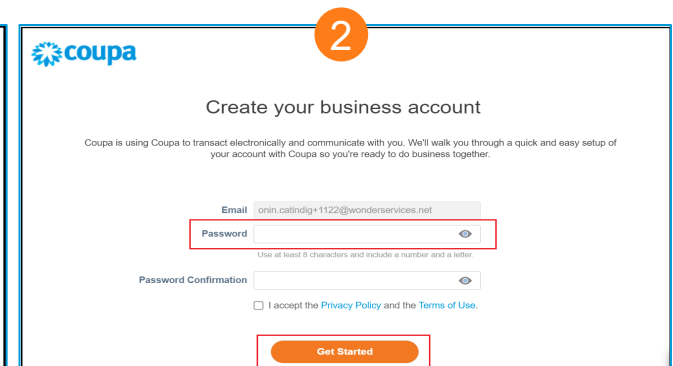
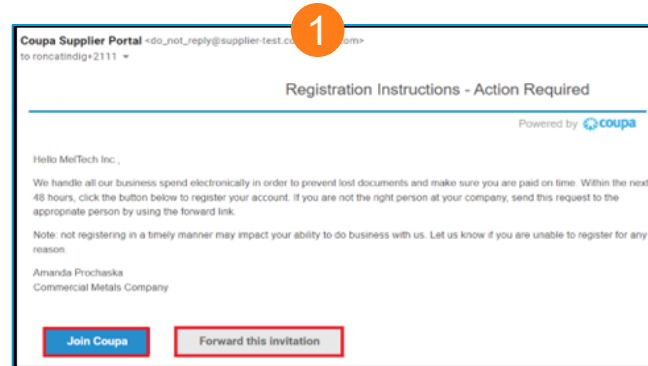
After you receive an invitation to join Coupa Supplier Portal

1. Click on **Join Coupa**.  
*Note: This email can also be forwarded to other members of the company.*

2. Set up your password.  
 Click **Get Started**.

3. Fill out the relevant information for your company.  
 Click **Next**.

4. Complete your profile.



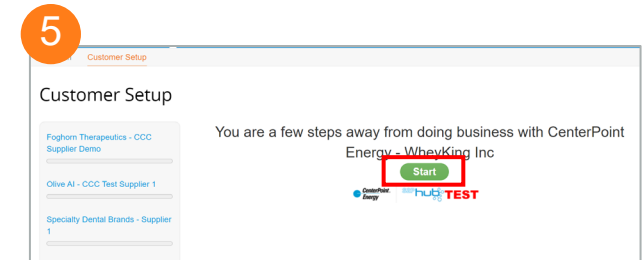
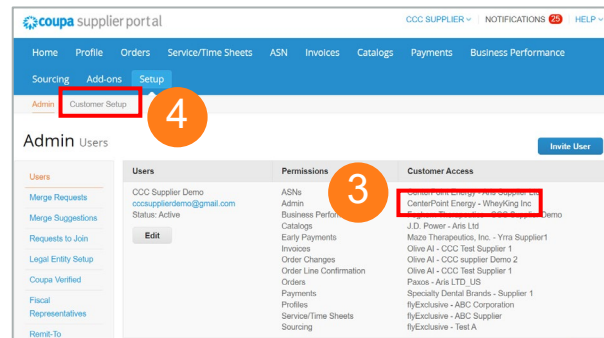
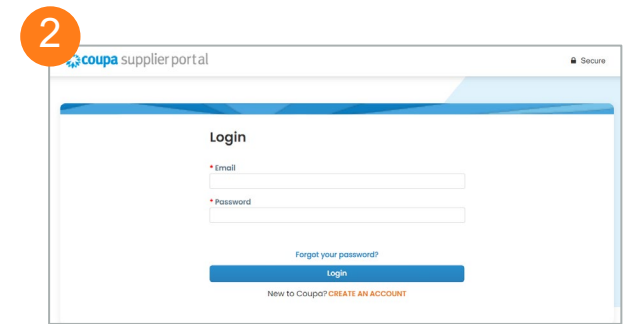
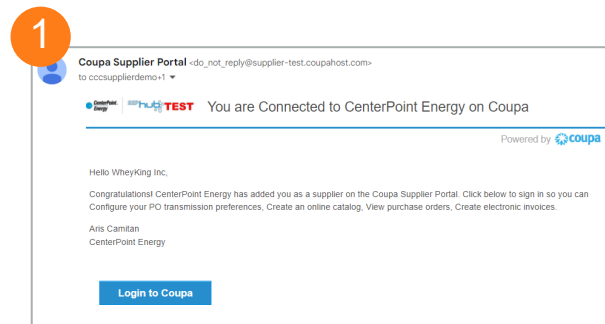
*Note: you may be prompted to join Coupa Advantage for a fee. This is not required to complete your profile or to transact with CenterPoint Energy.*

# Connecting to CenterPoint Energy with an Existing CSP Account

# Connecting CenterPoint Energy to Current CSP Account

If your organization already has an account in the CSP, CenterPoint Energy will automatically show in your customer list. However, you will still receive an email to fully link.

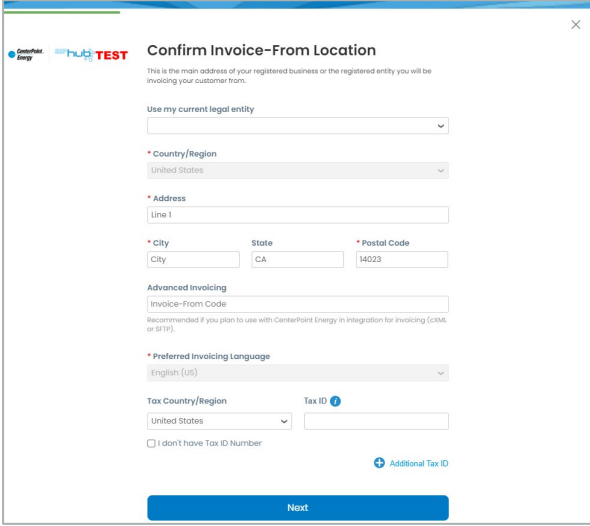
1. Upon receiving the notification from Coupa, click **Login to Coupa**.
2. Coupa Supplier Portal page will be displayed. Enter your credentials and click **Login**.
3. Once login credentials are setup, CenterPoint Energy will be added in your customer access list automatically.
4. Click Customer Setup.
5. Choose CenterPoint Energy's profile and complete the steps to finish the setup. Click **Start**.



# Connecting CenterPoint Energy to Current CSP Account


6. Confirm the Invoice-from Location, Ship-to from, etc. Once done, click **Next**.

6



7. Finish the setup until steps are completed and click **Finish**.

7

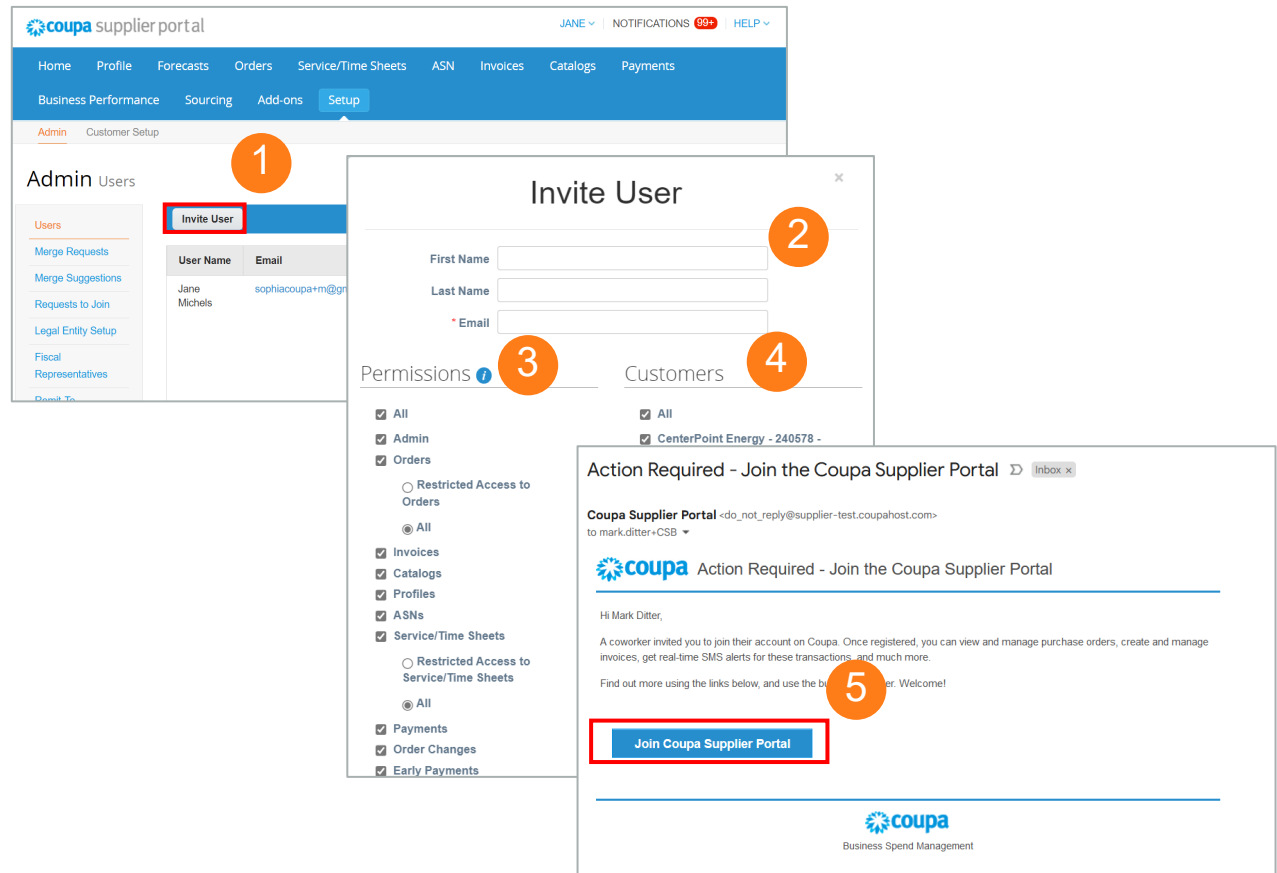


# Self-Service Management of Contractor Users/Access to Coupa Supplier Portal

# Management of Your Company's CSP User Access

As your organization changes, you have the ability to manage what users have access and what kind of access to the CSP. From the **Setup > Admin > Users** Tab the steps are below

1. Click the **Invite User** button to bring up the invitation form.
2. Populate the Name and Email of the co-worker.
3. Further review and adjust which Permissions they require.
4. Review the Customer who that user should support.
5. Once completed, an email will be sent to the user to accept and **Join Coupa Supplier Portal**



The image illustrates the process of adding a new user to the Coupa Supplier Portal. It shows the 'Admin Users' interface where the 'Invite User' button is selected. The 'Invite User' form allows for entering the user's name and email. A permissions list is shown, and a customer is selected. Finally, an email invitation is shown with a 'Join Coupa Supplier Portal' button.

# Combining/Linking Account

It is possible that your company has multiple entities in CenterPoint’s systems, this may result in multiple invites to the CSP. You can merge accounts if desired to simplify and reduce logins. From the **Setup > Admin** Tab follow the steps are below:

1. Select **Merge Requests**
2. Enter the email address of the user who was invited to the CSP which you wish to merge.
3. Complete the CAPTCHA
4. Click the **Request Merge** button.

### Admin Merge Requests

- 1 [Users](#)
- 2 [Merge Requests](#)
- [Merge Suggestions](#)
- [Requests to Join](#)
- [Legal Entity Setup](#)
- [Fiscal Representatives](#)
- [Remit-To](#)
- [Early Pay Discounts](#)
- [SFTP Accounts](#)
- [cXML Errors](#)
- [SFTP File Errors \(to Customers\)](#)


#### Initiate Merge Request

2

3

reCAPTCHA is for testing purposes only. Please report to the site admin if you are seeing this.

 I'm not a robot
 

  
reCAPTCHA  
Privacy - Terms

4

 ! Merging will join the accounts and give all combined users the ability to invoice and submit payment information to linked customers on behalf of your company. Before sending a merge request, confirm that this email address belongs to a user who is part of your organization. Once approved, an account merge cannot be undone. [Learn more about merging accounts.](#)

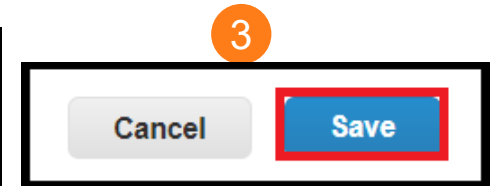
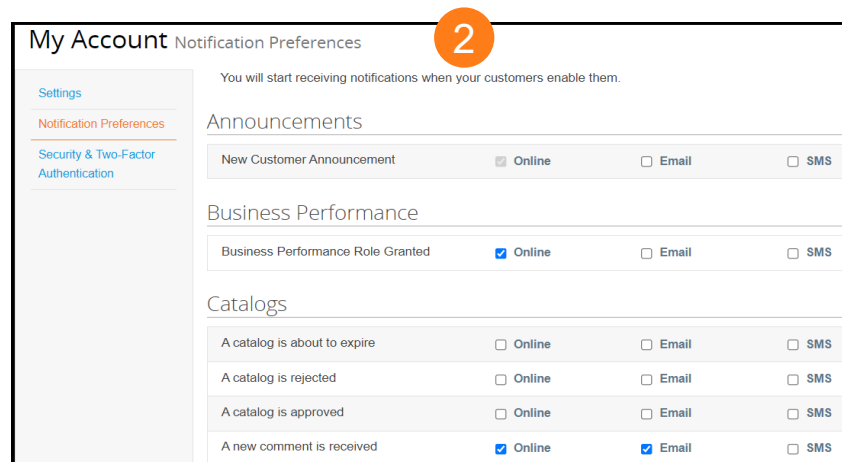
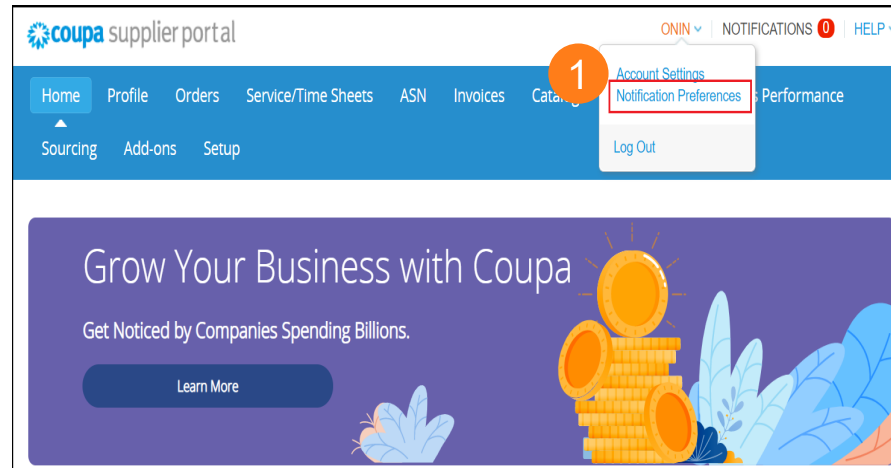
Request Merge



# Managing Notifications

# CSP - How to Manage Notifications

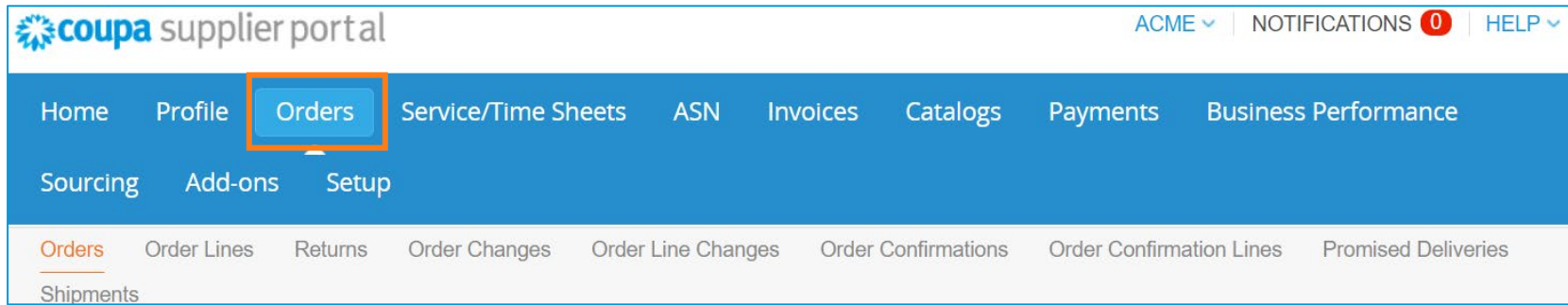
1. Hover your mouse over your name. Click Notification Preferences.
2. Click the type of notifications that you want to enable or disable.
3. Click Save.



# Supplier: Create Invoice with Lines from Contract (Contract Services)

# Supplier : Create Invoice with Lines from Contract (Contract Services)


1. To start creating an Invoice, click on the **Orders** tab.









2. Search for the PO (work order) that you want to create an invoice for and click on the gold coins under **Actions**.

*Note: the PO number should begin with WO as shown in the green rectangle.*

{Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}


Click the  Action to Accept the Purchase Order and Create an Invoice using its data

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
WO_101524866_119123	11/17/23	Issued	None	Supplier – Please do not change or delete this ...	No	0.00		 
WO_101524857_119123	11/17/23	Issued	None	Supplier – Please do not change or delete this ...	No	0.00		 
WO_101524854_119123	11/17/23	Issued	None	Supplier – Please do not change or delete this ...	No	0.00		 

# Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

3. A **Remit-To-Address** is required prior to creating an Invoice. If none is setup, then the system will prompt you to create one.

4. After creating the Remit-To-Address (if applicable), populate the Invoice details. Fields marked with red asterisk (\*) are required fields.

*Note: Invoice numbers must be unique, or they will not be accepted – a green check mark  will appear if accepted.*






5. A dummy line will be included with **“Supplier – Please do not change or delete this line”** in the Description. Any additional lines will need to be added using the instructions on the next slide.

# Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

6. To add lines from contract, click on “Pick lines from Contract” in the line item section of the invoice.



7. Select the required lines from the contract by clicking on “+” sign in the Actions column.  
*Note: Choose rates from the same **contract**, using the search function to find the right contracts and rates. Please ensure you are also picking from the correct OA Line Short Text (current rates).*

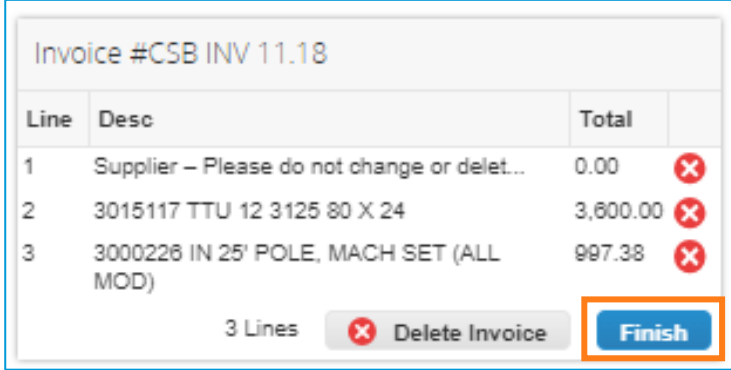
View With OA Line <input type="text"/> Advanced Search <input type="text"/>							
Name	Contract Name	Contract #	OA Line Short Text	Part Number	Auxiliary Part Number	Price	Actions
3015117 TTU 12 3125 80 X 24	Acme Pole Company   2022-2023   4600030123	4600030123	2022 Resiliency Trussing	None	100-430	3,600.00	
3009311 - FOREMAN & TRUCK - OT	Acme Pole Company   2022-2023   4600030123	4600030123	2020 Distribution Ground Line Treatment	None	40-180	123.02	
3000228 IN 25' POLE, MACH SET (ALL MOD)	Acme Pole Company   2022-2023   4600030123	4600030123	2021 Distribution Groundline Treatment	12KV ESMNT	10-1300-12KV ESMNT	997.38	
3015190 VIRTUAL POLE LOAD SCREENING	Acme Pole Company   2022-2023   4600030123	4600030123	2022 Virtual Pole Load Screening	None	110-10	27,500.00	
3015292 TTU 6 250 80 X 12	Acme Pole Company   2022-2023   4600030123	4600030123	2022 Resiliency Trussing	None	100-500	2,300.00	

\*If your contract has modifiers, it will appear in the Part Number column. Example:

Part Number  
12KV ESMNT

# Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

8. After adding all the lines click “Finish”

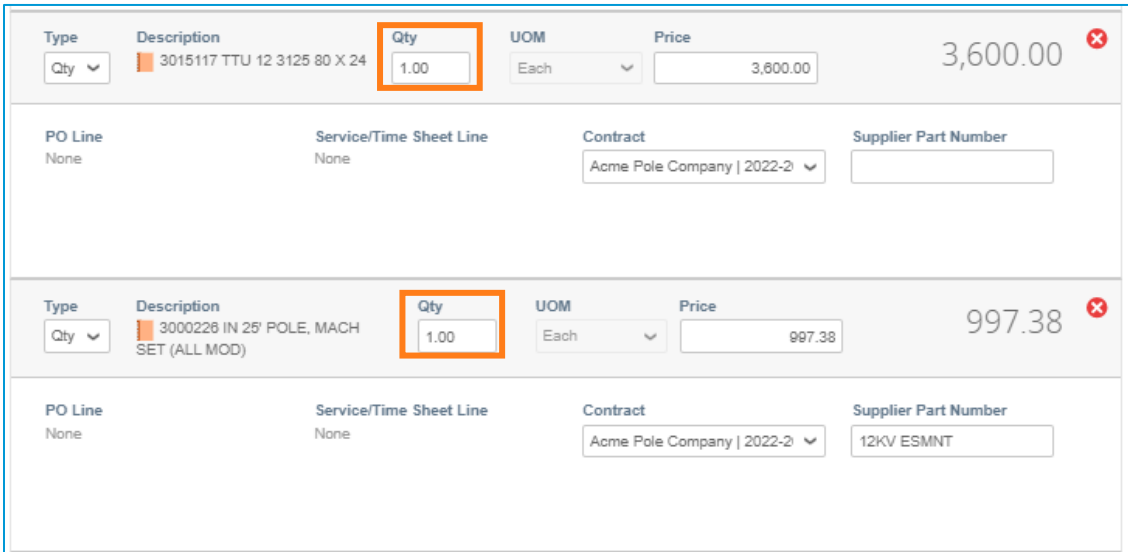


Invoice #CSB INV 11.18

Line	Desc	Total	
1	Supplier – Please do not change or delet...	0.00	✘
2	3015117 TTU 12 3125 80 X 24	3,600.00	✘
3	3000226 IN 25' POLE, MACH SET (ALL MOD)	997.38	✘

3 Lines ✘ Delete Invoice **Finish**

9. Update the quantity of lines added from a contract



Type: Qty Description: 3015117 TTU 12 3125 80 X 24 Qty: 1.00 UOM: Each Price: 3,600.00 Total: 3,600.00 ✘

PO Line: None Service/Time Sheet Line: None Contract: Acme Pole Company | 2022-2 Supplier Part Number:

---

Type: Qty Description: 3000226 IN 25' POLE, MACH SET (ALL MOD) Qty: 1.00 UOM: Each Price: 997.38 Total: 997.38 ✘

PO Line: None Service/Time Sheet Line: None Contract: Acme Pole Company | 2022-2 Supplier Part Number: 12KV ESMNT

# Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

10. Populate shipping and taxes as applicable.

Totals & Taxes	
Lines Net Total	4,597.38
<hr/>	
Shipping	<input type="text" value="100"/>
<hr/>	
Tax	<input type="text" value="0.000"/> % <input type="text" value="0.000"/>
<hr/>	
Total Tax	0.00
Net Total	4,597.38
<b>Total</b>	<b>4,597.38</b>

11. Click Calculate to get the updated invoice total.

*Note: Please use this as a validation that what was selected matches the invoice total.*

Total Tax	0.00
Net Total	4,597.38
<b>Total</b>	<b>4,597.38</b>
<input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Save as Draft"/> <input type="button" value="Calculate"/> <input type="button" value="Submit"/>	



# Supplier Guide to CSP: Create Invoice with Lines from Contract (Contract Services)

12. Once invoice details are complete, click **Submit** and a pop up will appear for you to **Send Invoice** for CenterPoint approval.

Total Tax	0.00
Net Total	4,597.38
<b>Total</b>	<b>4,597.38</b>

Delete Cancel Save as Draft Calculate **Submit**

**Are You Ready to Send?** X

You're about to send an invoice to CenterPoint Energy for a total amount of 4,697.38. Once sent, you'll have to contact your customer directly to make changes to the invoice.

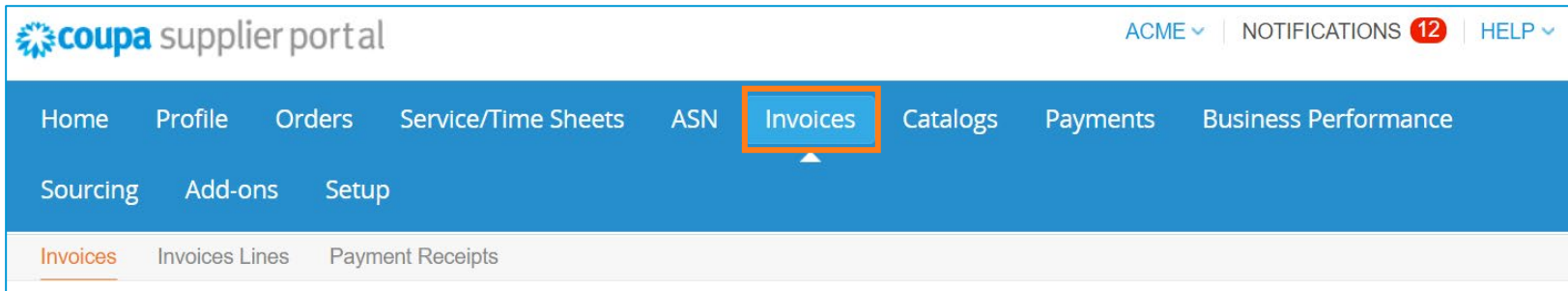
Continue Editing **Send Invoice**

## Supplier: Create Credit Note (Contract Services)

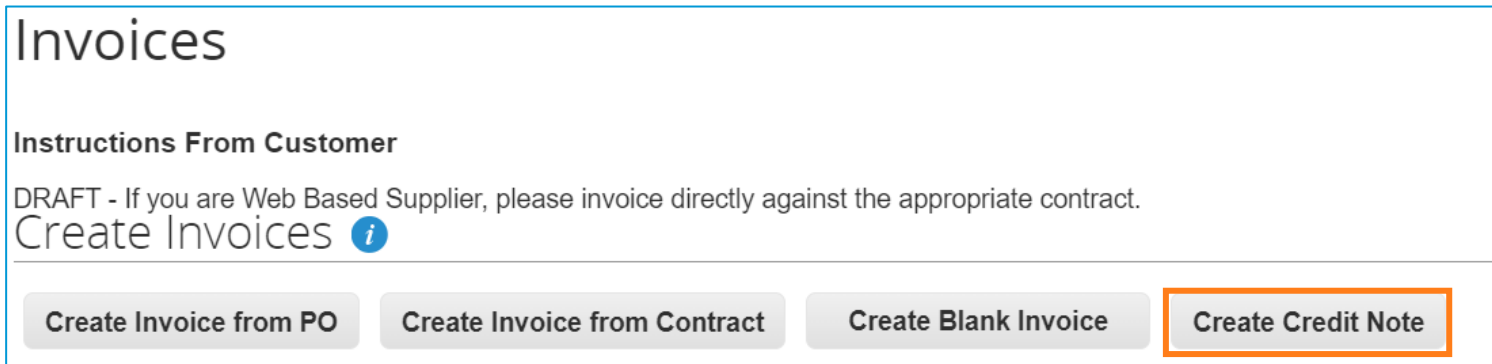
*Note: CSB Credits **must be** submitted the day after Invoice submission (due to need for Invoice to be integrated to SAP prior to crediting). If supplier ignores the warnings, the credit note will be blocked from approving. CNP will simply reject/dispute back to supplier to create a new Credit.*

# Supplier : Create Credit Note (Contract Services)

1. Click on the **Invoices** tab to begin creating a Credit Note.

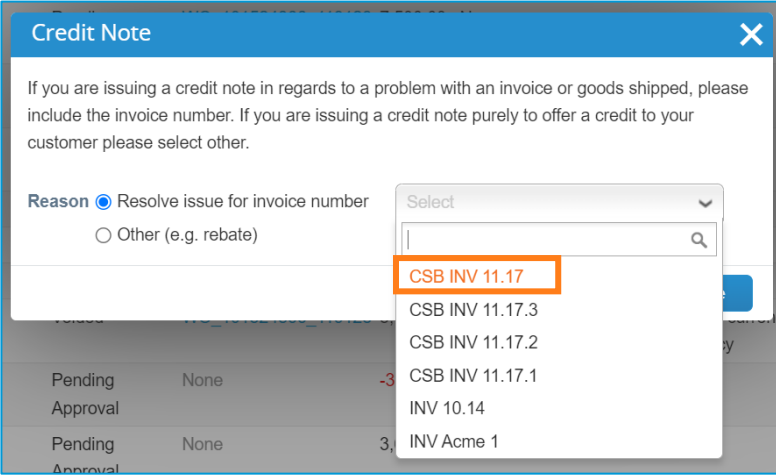


2. Click on the **Create Credit Note**



# Supplier : Create Credit Note (Contract Services)

- Click on **Resolve issue for invoice number** dropdown button and choose the invoice that needs to be credited.



**Credit Note** [X]

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

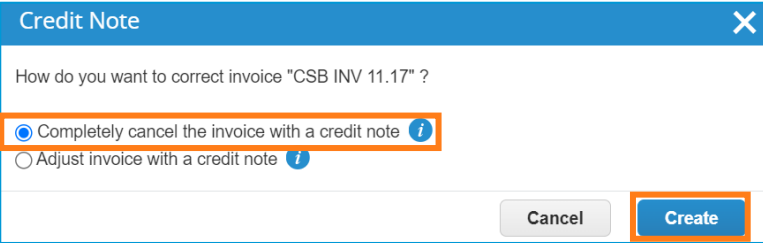
**Reason**  Resolve issue for invoice number  
 Other (e.g. rebate)

Select

- CSB INV 11.17
- CSB INV 11.17.3
- CSB INV 11.17.2
- CSB INV 11.17.1
- INV 10.14
- INV Acme 1

Pending	None	-3
Approval		
Pending	None	3
Approval		

- You can select to **Completely cancel the invoice with a credit note** or **Adjust the invoice with a credit note**. For this example, we chose to *Completely cancel the invoice with a credit note* and then click **Create**.



**Credit Note** [X]

How do you want to correct invoice "CSB INV 11.17" ?

Completely cancel the invoice with a credit note *i*

Adjust invoice with a credit note *i*

Cancel Create

# Supplier : Create Credit Note (Contract Services)

5. Create Credit Note page will be displayed. Populate all required fields including the Credit Note #.  
*Note: We ask that you use the following naming convention for credit notes. If an invoice number is 1234, the note # should be 1234 CN.*

**Create Credit Note** Create

This credit note applies to invoice [CSB INV 11.17](#). When approved, the credit will fully cancel the invoice's impact to the transaction.

<p><b>General Info</b></p> <div style="border: 2px solid orange; padding: 2px; margin-bottom: 5px;"> <p>* Credit Note # <input type="text"/></p> <p>* Credit Note Date <input type="text" value="11/20/23"/> </p> </div> <p>Payment Term <input type="text" value=""/></p> <p>* Currency <input type="text" value="USD"/></p> <p>Status <input type="text" value="Draft"/></p> <p>Original Invoice # <input type="text" value="CSB INV 11.17"/></p> <p>Original Invoice Date <input type="text" value="11/17/23"/></p> <div style="border: 2px solid orange; padding: 2px; margin-bottom: 5px;"> <p>Invoice Image <input type="button" value="Choose File"/> <input type="text" value="No file chosen"/></p> </div> <p>Supplier Note <input style="width: 100%; height: 30px;" type="text"/></p> <p>Attachments <a href="#">Add File</a>   <a href="#">URL</a>   <a href="#">Text</a></p>	<p><b>From</b></p> <p>* Supplier <input type="text" value="119123 - Acme Pole Company"/></p> <p>Supplier Tax ID <input type="text" value=""/></p> <p>* Invoice From Address <input type="text" value="119123 - Acme Pole Company test New York, Ny 123 United States"/></p> <p>* Remit-To Address <input type="text" value="119123 - Acme Pole Company New York New York, 1234 United States"/></p> <p>* Ship From Address <input type="text" value="119123 - Acme Pole Company New York New York, 1234 United States"/></p> <p><b>To</b></p> <p>Customer <input type="text" value="CenterPoint Energy"/></p>
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*Note: The Invoice Image scan field is required. Please upload the invoice document related to this Credit Note.*

# Supplier : Create Credit Note (Contract Services)

6. Review the Invoice line details and Total summary section, then click **Submit**.

Lines
 Line Level Taxation

Adjustment Type Price

Type	Description	Price
	Supplier - Please do no	0.00

PO Line WO\_10152486\_119123-1    Service/Time Sheet Line None    Contract     Supplier Part Number

Billing None

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Adjustment Type Quantity

Type	Description	Qty	UOM	Price	
Qty	3015117 TTU 12 3125 80 X 24	-1.00	Each	3,600.00	-3,600.00

PO Line None    Service/Time Sheet Line None    Contract Acme Pole Company | 2022-2    Supplier Part Number

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Adjustment Type Quantity

Type	Description	Qty	UOM	Price	
Qty	3015119 TTU 12 3125 80 X 30	-1.00	Each	3,900.00	-3,900.00

PO Line None    Service/Time Sheet Line None    Contract Acme Pole Company | 2022-2    Supplier Part Number

Totals & Taxes

Lines Net Total -7,500.00

---

Shipping 0.000

---

Tax 0.000 % 0.000

---

Total Tax 0.00

Net Total -7,500.00

**Total** -7,500.00

Delete
Cancel
Save as Draft
Calculate
Submit

# Supplier : Create Credit Note (Contract Services)

7. Click **Send Credit Note**.

**Are You Ready to Send?** ✕

You're about to send an credit note to CenterPoint Energy for a total amount of -7,500.00. Once sent, you'll have to contact your customer directly to make changes to the credit note.

8. Once sent, the Credit Note will be processed by Centerpoint.

Invoices

119123 - Acme Pole Company credit note #CSB INV 11.17 CN 1 approved ✕


# Supplier: Managing Disputed Invoices



# Supplier : Disputed Invoice


1. If CenterPoint Energy has internally rejected then disputed an invoice, the status of invoice in CSP will change automatically to **Disputed**. The Dispute Reason column will list the reason the invoice has been disputed.
2. To resolve the dispute, click the **Resolve** button in the Actions column.

### Invoices

**Instructions From Customer**  
 DRAFT - If you are Web Based Supplier, please invoice directly against the appropriate contract.  
 Create Invoices 

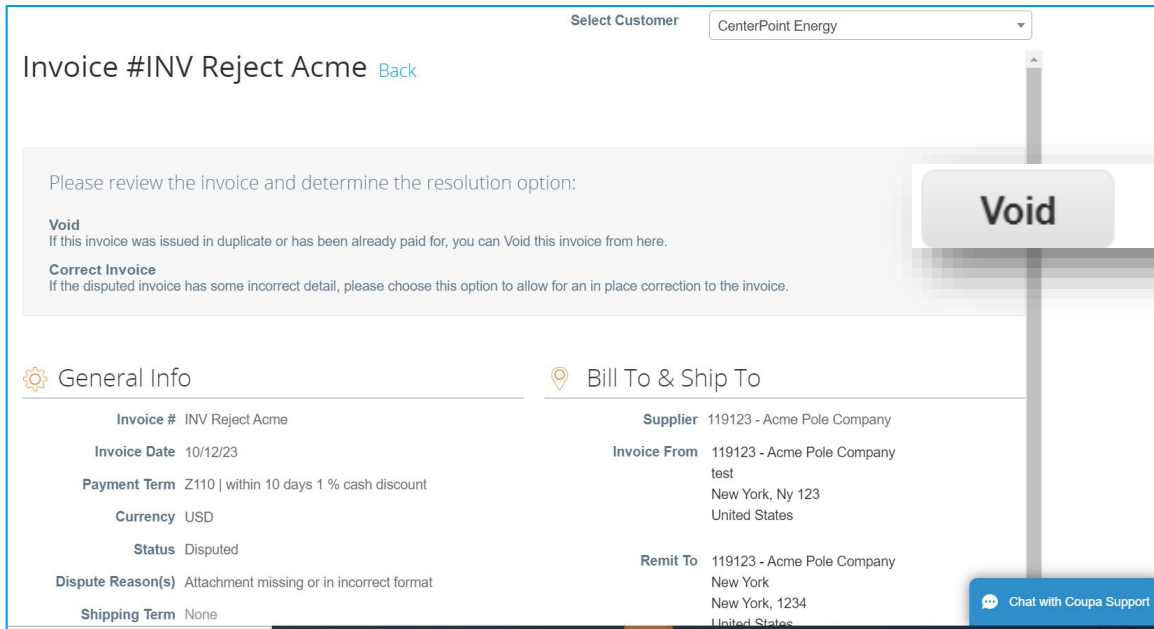
Create Invoice from PO
Create Invoice from Contract
Create Blank Invoice
Create Credit Note

Export to View All Search

Invoice #	Created	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
<a href="#">INV Reject Acme</a>	10/12/23	Disputed	None	2,600.00	Yes	Attachment missing or in incorrect format	

# Supplier : Disputed Invoice

- After clicking the Resolve button, the invoice page will open. You will have to options to resolve the disputed invoice:
  - Void** – Use the Void option when the invoice was issued as a duplicate or has already been paid. Clicking this option will cancel the invoice.
  - Correct Invoice** - Use this option to correct any detail needed for the invoice to be resubmitted and approved. Clicking this option will open the invoice and unlock editable fields. Reference the Dispute Reason column and the comment section for details as to why the invoice was disputed. *Note: Do not delete the \$0.00 dummy line when resubmitting a corrected invoice.*



Select Customer: CenterPoint Energy

Invoice #INV Reject Acme [Back](#)

Please review the invoice and determine the resolution option:

**Void**  
If this invoice was issued in duplicate or has been already paid for, you can Void this invoice from here.

**Correct Invoice**  
If the disputed invoice has some incorrect detail, please choose this option to allow for an in place correction to the invoice.

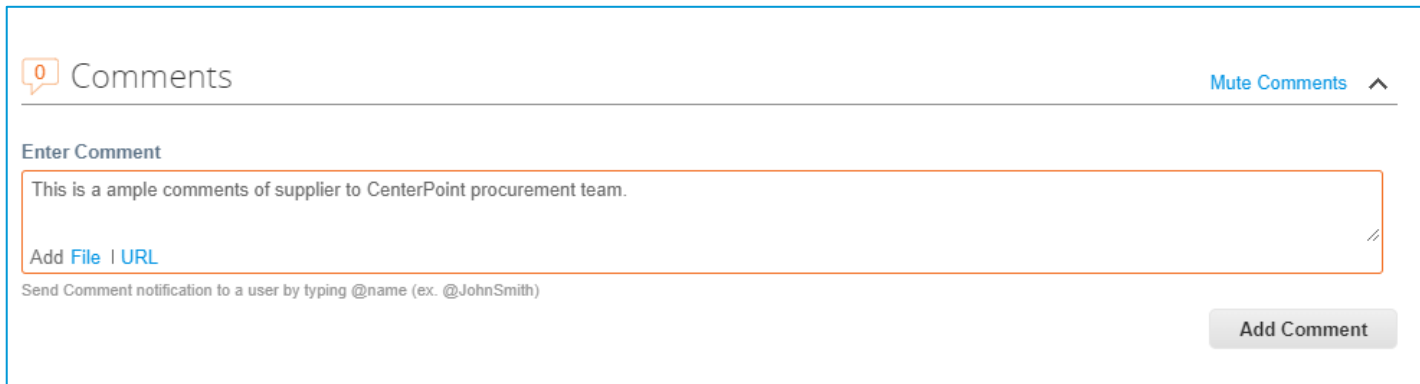
General Info		Bill To & Ship To	
Invoice #	INV Reject Acme	Supplier	119123 - Acme Pole Company
Invoice Date	10/12/23	Invoice From	119123 - Acme Pole Company test New York, Ny 123 United States
Payment Term	Z110   within 10 days 1 % cash discount	Remit To	119123 - Acme Pole Company New York New York, 1234 United States
Currency	USD		
Status	Disputed		
Dispute Reason(s)	Attachment missing or in incorrect format		
Shipping Term	None		

Chat with Coupa Support

# Supplier: Using the Comments Feature

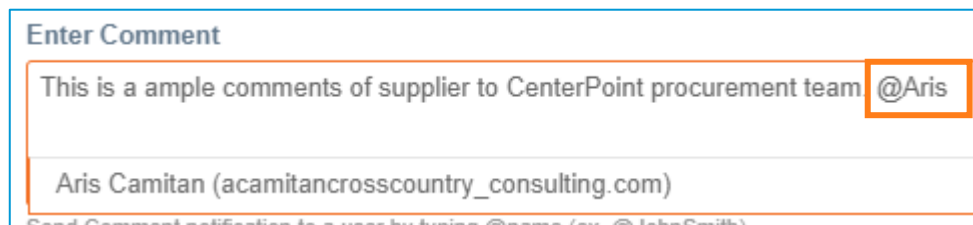
# Supplier : Comment Features

Under each invoice document in CSP, suppliers can send comments to and receive comments from the CenterPoint Energy team to communicate within the system. The Comments section is found at the bottom of the invoice page.



The screenshot shows a 'Comments' section with a header containing a speech bubble icon with '0' and the text 'Comments'. On the right side of the header is a 'Mute Comments' link with an upward arrow. Below the header is a text input field with the placeholder text 'Enter Comment'. The input field contains the text 'This is a ample comments of supplier to CenterPoint procurement team.' Below the input field is a link 'Add File | URL'. Underneath the link is a small instruction: 'Send Comment notification to a user by typing @name (ex. @JohnSmith)'. At the bottom right of the input area is a grey 'Add Comment' button.

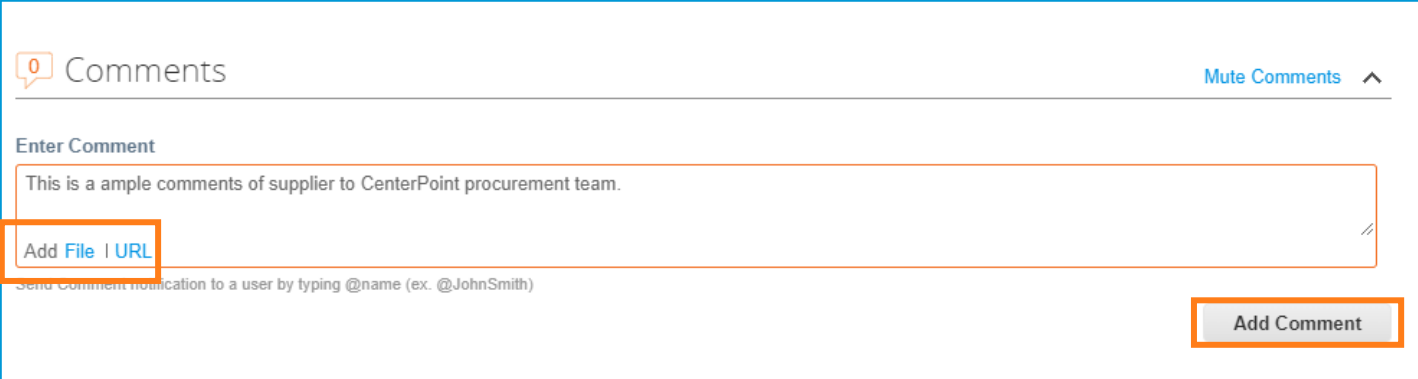
Suppliers can also mention or tag a specific person from the CNP by using the @ symbol and typing the person's name.



This screenshot is a close-up of the text input field from the previous image. The text 'This is a ample comments of supplier to CenterPoint procurement team' is followed by '@Aris'. The '@Aris' tag is highlighted with a red box. Below the input field, a dropdown menu is visible, showing the name 'Aris Camitan (acamitancrosscountry\_consulting.com)'.

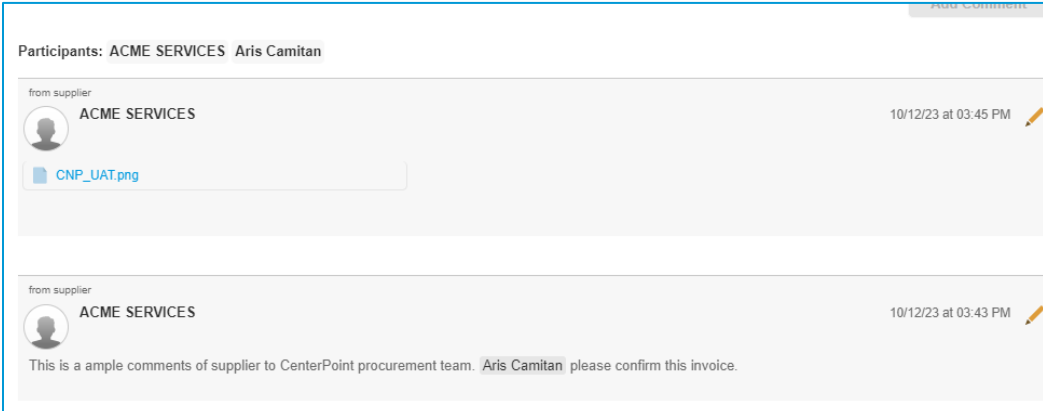
# Supplier : Comment Features

Attachments and URLs can be included in comments by clicking the respective buttons, shown below.



The screenshot shows a comment input form. At the top left, there is a 'Comments' header with a speech bubble icon containing the number '0'. To the right of this header is a 'Mute Comments' link with an upward-pointing arrow. Below the header is a text input field with the placeholder text 'Enter Comment'. Inside this field, the text 'This is a ample comments of supplier to CenterPoint procurement team.' is entered. Below the text field is a button labeled 'Add File | URL'. At the bottom right of the form is a button labeled 'Add Comment'. A small note below the text field reads 'Send comment notification to a user by typing @name (ex. @JohnSmith)'.

Once all comments are added, click **Add Comment** to submit the comments.



The screenshot shows a list of comments. The top comment is from 'ACME SERVICES' and includes an attachment named 'CNP\_UAT.png'. The bottom comment is also from 'ACME SERVICES' and contains the text 'This is a ample comments of supplier to CenterPoint procurement team. Aris Camitan please confirm this invoice.' Both comments are dated '10/12/23 at 03:45 PM' and '10/12/23 at 03:43 PM' respectively. The name 'Aris Camitan' is highlighted in the second comment. A 'Participants: ACME SERVICES Aris Camitan' header is visible at the top of the comment list.

# Supplier: Create Custom Views

# Creating a Custom View (1/4)


The Coupa Supplier Portal includes several built-in views. If additional views are needed to find specific data, suppliers are able to create custom views. The below steps show the creation of an example custom views.





A report is needed for all **Contract Service Workorder POs**.

1. Go to Orders tab, open the **View** drop down list by clicking on the dropdown arrow.
2. Select **Create View**

## Purchase Orders

**Instructions From Customer**  
 {Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page}

Click the  Action to Accept the Purchase Order and Create an Invoice using its data

Export to	View	Search	Comments	Actions
	[CNP]: CSB WO View			
	All			
	[CNP]: CSB WO View			
	Confirmations Awaiting Buyer Review			
	Open Orders			
	Orders not acknowledged			
	Orders not invoiced			
	Orders past due			
	Orders Pending Confirmation			
	Orders with pending changes			
	Overdue Confirmations			
	POs with service lines			
	Create View			

## Creating a Custom View (2/4)

3. Enter a name for the custom view.  
*Note: The name must be less than 30 characters long.*
4. Select the level of visibility. Selecting **Everyone** will share the view with every user in your organization.

### Create New data table view

#### General

**Name**

**Visibility**  Only Me  
 Everyone

**Start with view**

#### Conditions

**Match Conditions**

**Filter By**  **Filter Clause**  **Filter Text**

5. Add as much detail as you desire by selecting more fields and setting up the conditions by clicking the “+” button.



## Creating a Custom View (3/4)

6. Select the columns to include in your view by dragging them from the Available columns list and dropping them into the Selected columns list. Adjust the order of the columns by moving them up and down.

### 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
Additional Instructions	PO Number
Buyer	Order Date
Comments	Status
Payment Agreements	Acknowledged At
PO ID	Items
Work Order Info	Unanswered Comments
	Total
	Assigned To
	Actions

# Creating a Custom View (4/4)

7. Select the field that will determine how the data is sorted. This field DOES NOT have to be moved to the selected column to apply. Note that the sort does not apply to exported data.

Default Sort Order

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Sort by  in ascending order.

8. Click **Save**.

9. The new custom view is now available for review and export.

Purchase Orders

View created ✕

**Instructions From Customer**  
 (Example text - this is set on your Company Information setup page and will be displayed for CSP and SAN suppliers on the Purchase Order list page)

Click the Action to Accept the Purchase Order and Create an Invoice using its data

Export to  View Workorder POs  Search

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
WO_102933496_119850	04/19/23	Issued	None	To Be Deleted By Supplier	No	0.00		
WO_95741650	01/27/23	Issued	None	1 Each of To Be Deleted by Supplier	No	1.00		
WO_95741651	02/01/23	Issued	None	1 Each of To Be Deleted by Supplier	No	0.00		
WO_95741723	02/01/23	Issued	None	1 Each of To Be Deleted by Supplier	No	0.00		

**Thank You**