CSUBUY
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Quick Reference Guide

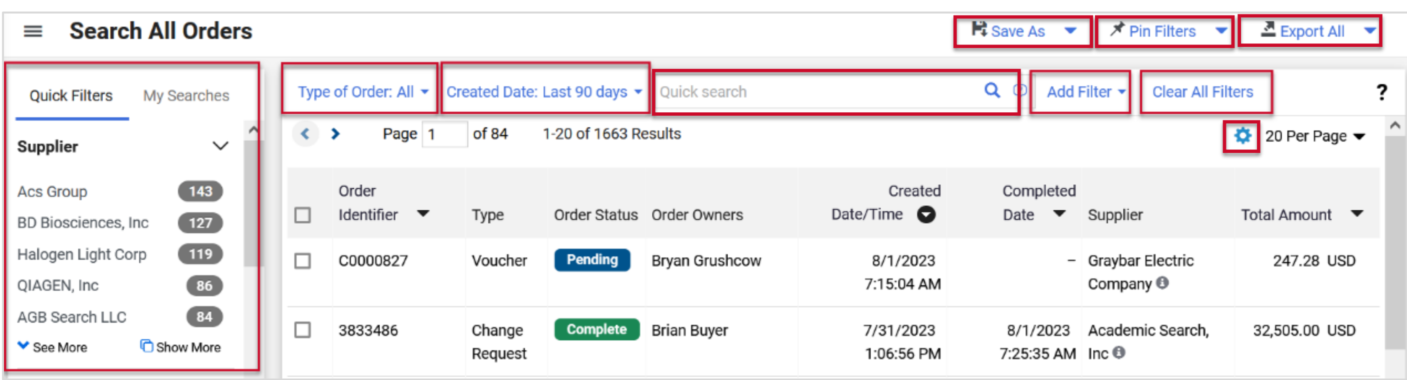
Search Orders and Export Reports

Learn how to filter searches and export reports.

Search for Orders

SEARCH FOR ORDERS

1. Navigate to **Orders** > **Search** > **All Orders**.
2. Open the **Type of Order** drop-down menu and select the type of order such as Change Request, Purchase Order, Receipt, Requisition, or Voucher, then select **Apply**.
3. Open the **Created Date** drop-down menu and specify the date of your search from these options: All, Within, and Between, then select Apply. The default is the last 90 days.
4. In the Quick Search bar enter keywords and then select the **magnifying glass** icon to narrow your search.
5. Add filters to narrow your search.
    a. Use the **Quick Filters** to choose a supplier, business unit, order owner, approved by, commodity code, contract type, participant, pending approver, product flags, status flags, or supplier class.
    b. Use the **Add Filter** drop-down menu for additional filters.
    c. Select **Clear All Filters** to remove any filters from your search.
6. Configure Column Display – select the gear icon to sect which field you want displayed in the search results. Rearrange the column order or remove a column, then select **Apply**.



Pin Filters

1. Select **Pin Filters** to make the current filters you have selected your default layout. Select **Yes** to confirm your choice.
2. You can delete the filters you have pinned in the **Pin Filters** drop-down menu. Select **Remove Pinned Filters** and select **Yes** to confirm your choice.
3. In the **Pin Filters** drop-down menu, select **Pin Columns** to make the current column view your default layout. Select **Yes** to confirm your choice.

Save a Search

1. Select the **Save As** icon to save your search as a favorite. Additional options are available from the drop-down menu.
2. The **Save Search** box displays.
    a. Insert a **Nickname** for the search.
    b. Open the **Add Description** section to insert text describing this search.
    c. Select Folder Destination to your **Personal** folder. To create a personal folder, select **Add New** and insert a folder name and description.
    d. Select **Save**.
3. Navigate to the **My Searches** tab to find your saved searches.

EXPORT A REPORT

1. Select **Export All** to export all search results or select **Export Selected Rows** from the **Export All** drop-down menu to only export the orders you have checked.
2. An Export Orders box displays. Insert a **Title** for the results you are exporting.
3. Select **Submit**.
4. To view the status and retrieve your export, go to the **Export All** drop-down menu and select **Manage Search Exports**.
5. From the **Manage Exports** page, select the **Export Requests** tab.
6. Select the **Title** of your search export to download.
7. Select **Delete** under the Actions column to delete it from the Export Requests tab.

Schedule an Export

1. From the Manage Exports page, select the Export Schedules tab.
2. Select **Create Schedule for…**
3. Select the Search Type you would like to export.
4. The Schedule Export pop-up window appears. Enter the **Starts On** date, **Frequency**, and **Export Until** date.
5. Select **Save**.
6. From the Export Schedules tab, select the **Edit** drop-down menu to make changes, delete, or disable the export schedule.

Create an Export Template

1. From the Manage Exports page, select the **Export Templates** tab.
2. Select **Create Template for…**
3. Select the data type you would like to create an export template for.
4. Fill out the Export Options, Column Selection, and Template Properties sections.
5. Select **Submit**.
6. From the Export Templates tab, select the **Edit** drop-down menu to edit, make a copy, delete, or share the template.