

PO SmartView



Enablement Guide

It's easy! Enablement of PO SmartView is a simple three-step process. The setup steps outlined in this guide should be completed by your company's Coupa Admin.

A banner graphic with a dark blue background. On the left, the text "PO SmartView" is written in white. To the right, there is a stylized illustration of a human head in profile, composed of glowing blue lines and dots, representing artificial intelligence. Various icons like a gear, a lightbulb, and a group of people are integrated into the head's structure. Arcs of light connect different points within the head and extend outwards.

PO SmartView

Artificial Intelligence helping Coupa Requesters know exactly what to do next.

STEP 1 - CREATE API KEY

Create a read-only API Key in Coupa by following the steps outlined below.

1. From the Coupa Admin Home page, click **Setup** (Integrations) & select **API Keys**
2. Click **Create**
3. In the API Create Screen, use the following values:
 - **Login** = DataMap PO SmartView
 - **Description** = API Key assigned to DataMap to enable PO SmartView
 - **Contact First Name** = (Coupa instance Admin's first name)
 - **Contact Last Name** = (Coupa instance Admin's last name)
 - **Contact Email** = (Coupa instance Admin's email address)
 - Leave **Expiry Date** blank if you plan to manually rotate your keys by a schedule. (If you think you might forget to rotate your keys, you can put an expiration date here (best practice is to periodically change your API Keys))
 - Click **Enable Permissions**, click **Check All Reads**, scroll to the bottom of the page, then click **Create** to generate your API Key
 - **Enable IP Whitelisting**: If you need whitelisting, please contact DataMap Support at coupa@datamapllc.com and we will provide you with your whitelisting parameters via email
4. After you click "Create" the API Key will be displayed. **Keep it handy! After you leave the API screen, you will not be able to view the key again.**

API Key Show

Name DataMap PO SmartView_

Description API Key assigned to DataMap to enable PO SmartView

Status active

Expiry Date March [redacted]

API Key 66341a0f7 [redacted] 3c

Integrations

- Integrations
- Integration Contacts
- Integration Runs
- Integration Errors
- Integration Warnings
- Integration Documentation
- sFTP Accounts
- cXML Errors
- API Dashboard
- DocuSign
- Call Outs
- API Filters
- API Keys**
- IP Whitelisting Configs

API Key Create

*** Login** DataMap PO SmartView

Description API Key assigned to DataMap

*** Contact First Name** Coupa

*** Contact Last Name** Admin

*** Contact Email** CoupaAdmin@company.cc

Expiry Date mm/dd/yy

Enable Permissions ☒

Enable IP Whitelisting ☐

Permissions

Check All • Uncheck All • **Check All Reads** • Uncheck All Reads • Check All Writes • Uncheck All Writes

Api/Account Groups

<input type="checkbox"/> Create Create account group	<input checked="" type="checkbox"/> Index Query account groups	<input checked="" type="checkbox"/> Show Show account group	<input type="checkbox"/> Update Update account group
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Api/Account Types

<input type="checkbox"/> Copy Copy/Clone existing chart of accounts	<input type="checkbox"/> Create Create chart of accounts	<input checked="" type="checkbox"/> Index Query chart of accounts	<input checked="" type="checkbox"/> Show Show chart of accounts
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Api/Account Validation Rules

<input type="checkbox"/> Create	<input checked="" type="checkbox"/> Index	<input checked="" type="checkbox"/> Show	<input type="checkbox"/> Update
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Ability to create the work_confirmation header Ability to view list of the work_confirmation headers Ability to view the work_confirmation header Ability to update the work_confirmation header

Cancel **Create**

STEP 2 - DOWNLOAD PO SMARTVIEW

1. From the Coupa Admin Home page, click **Community**, then **App Marketplace**
2. Search for *PO SmartView*
3. Click **Get Started**

The image is a composite of three screenshots illustrating the steps to download PO SmartView. The top-left screenshot shows the Coupa Admin Home page navigation menu, with 'Community' and 'App Marketplace' highlighted by yellow arrows. The bottom-left screenshot shows the 'App Marketplace' search results for 'PO SmartView', with a yellow arrow pointing to the search bar. The right-side screenshot shows the 'DataMap PO SmartView' app page, with a yellow arrow pointing to the 'Get Started' button. The app page includes a description, a video player, and a 'Powered By DataMap' logo.

DataMap PO SmartView
Delivers a summary of your open PO lines with quick links to take action or view details.

Get Started

Categories

- Approval Notifications
- Business Intelligence
- Contingent Workforce
- Contracts
- ERP Accelerators

Search Results

DataMap PO SmartView
Delivers a summary of your open PO lines with quick links to take action or view details.
By DataMap

STEP 2 - DOWNLOAD PO SMARTVIEW (continued)

1. Submit Coupa's App Marketplace form
2. Click **Install now**
3. Enter your Coupa instance URL (https://your_instance.coupahost.com/) and click **Continue** (which will open Community Exchange in your Coupa instance)

The screenshot displays the Coupa App Marketplace interface for the DataMap PO SmartView app. The sidebar on the left contains filters for Category (Procurement, Business Intelligence), Coupa Product (P2P, Procurement), Integration Type (Embedded), and Developer (DataMap). The main form area is titled "Get started with DataMap PO SmartView" and includes fields for Email, Full Name, and Notes. A modal dialog is open, prompting the user to enter their Coupa instance URL. The dialog contains the Coupa logo, the text "To download this app, enter your Coupa instance URL below:", a text input field with the placeholder "https://your_instance.coupahost.com", an example "mycompany.coupahost.com", and a "Continue" button. Below the modal, the app details are repeated, and a confirmation message states: "Install DataMap PO SmartView? Thanks, we received your request and a Coupa Specialist will be in touch shortly. If you're a Coupa Admin, you can install DataMap PO SmartView and try it now!". At the bottom right, there are two buttons: "No thanks" and "Install now".

coupa App Marketplace

Search

DataMap

Category

Procurement

Business Intelligence

Coupa Product

P2P Procurement

Integration Type

Embedded

Developer

DataMap

Get started with DataMap PO SmartView

Please fill out

coupa App Marketplace

Search

Email *

Full Name

Notes

Tell us more -

DataMap

Category

Procurement

Business Intelligence

Coupa Product

P2P Procurement

Integration Type

Embedded

Developer

DataMap

coupa

To download this app, enter your Coupa instance URL below:

https://your_instance.coupahost.com

Example: mycompany.coupahost.com

Continue

Install DataMap PO SmartView?

Thanks, we received your request and a Coupa Specialist will be in touch shortly.

If you're a Coupa Admin, you can install DataMap PO SmartView and try it now!

No thanks

Install now

STEP 2 - DOWNLOAD PO SMARTVIEW (continued)

1. Click **Download**
2. Click **View Downloaded Content** which links to **Setup (Platform) - Installed Apps and Content** within your Coupa Instance

The screenshot shows the DataMap Community Exchange interface. The top navigation bar includes links for Travel & Expenses, Requests, Orders, Invoices, Community (selected), Payments, Inventory, Sourcing, Suppliers, Contracts, Reports, Travel, and Setup. Below this, a secondary bar lists Overview, Advantage, Intelligence, Sourcing Advantage, Community Exchange (selected), App Marketplace, Messages, and People. The main content area is titled 'Community Exchange' and features a search bar with the text 'Pooling Community Brain Power'. A blue button labeled 'View Downloaded Content' is visible. Below the search bar, the 'PO SmartView Panel App' is listed under 'Basic Info'. The app details include: Shared by Carly Thompson, Shared Date 06-May-2021, Contains Panel App(PO SmartView), Description (Stay on top of Receiving and Invoicing tasks with PO SmartView. As a free add-on to the Coupa homepage, you get a summary of your open PO lines with quick links to take action or view details. PO SmartView extends Coupa's platform and increases productivity by further simplifying and streamlining the user experience.), Categories (Procurement, Sourcing, Finance, Invoicing), Minimum Coupa Version 30.0.1, and Attachments (DataMap PO SmartView Enablement Guide.pdf). A 'Download' button is located at the bottom right of the app details. A green notification banner at the bottom of the page states: 'PO SmartView Panel App has been downloaded and contents can be found in their respective locations in your Coupa instance.' A yellow arrow points from the 'View Downloaded Content' link to the notification banner, and another yellow arrow points from the 'Download' button to the notification banner.

DataMap

What do you need?

Travel & Expenses Requests Orders Invoices **Community** Payments Inventory Sourcing Suppliers Contracts Reports Travel Setup

Overview Advantage Intelligence Sourcing Advantage **Community Exchange** App Marketplace Messages People

Community Exchange

Pooling Community Brain Power

[View Downloaded Content](#)
[Back to Community Exchange](#)

PO SmartView Panel App

Basic Info

Shared by Carly Thompson
Shared Date 06-May-2021
Contains Panel App(PO SmartView)
Description Stay on top of Receiving and Invoicing tasks with PO SmartView. As a free add-on to the Coupa homepage, you get a summary of your open PO lines with quick links to take action or view details. PO SmartView extends Coupa's platform and increases productivity by further simplifying and streamlining the user experience.
Categories Procurement, Sourcing, Finance, Invoicing
Minimum Coupa Version 30.0.1
Attachments [DataMap PO SmartView Enablement Guide.pdf](#)

Screenshots

[Download](#)

Community Exchange

Pooling Community Brain Power

[View Downloaded Content](#)

PO SmartView Panel App has been downloaded and contents can be found in their respective locations in your Coupa instance.

coupa

Business Spend Management • English • Accessibility • Coupa Cares

STEP 3 - ACTIVATE PO SMARTVIEW

1. From within **Setup (Platform) - Installed Apps and Content** of your Coupa Instance, click the app name **PO SmartView Panel App**
2. Click the edit button
3. When prompted, enter the API Key you created in step one into the **Coupa Apikey** field & click **Update**

You are now ready to use PO SmartView!

The screenshot displays the 'Installed Apps and Content' interface. On the left, a list of apps is shown with 'PO SmartView Panel App' highlighted by a yellow arrow. The main panel shows the details for 'PO SmartView Panel App', including a description and a table of content. The table has columns for Name, Parent, Type, Status, and Action. The row for 'PO SmartView 3' shows it is a 'Panel App' with an 'Inactive' status. A yellow arrow points to the edit icon (pencil) in the Action column. Below the table, a modal window titled 'Please configure your application' is open. It contains the text 'PO SmartView 3' and a field for '* Coupa Apikey' with a yellow arrow pointing to it. At the bottom right of the modal are 'Cancel' and 'Update' buttons, with a yellow arrow pointing to the 'Update' button.

Installed Apps and Content

Export to View All Advanced Search

Name

PO SmartView Panel App


Per page 15 | 45 | 90

PO SmartView Panel App

Details

Stay on top of Receiving and Invoicing tasks with PO SmartView. As a free add-on to the Coupa homepage, you get a summary of your open PO lines with quick links to take action or view details. PO SmartView extends Coupa's platform and increases productivity by further simplifying and streamlining the user experience.

Content

Name	Parent	Type	Status	Action
PO SmartView 3	None	Panel App	Inactive	


Please configure your application

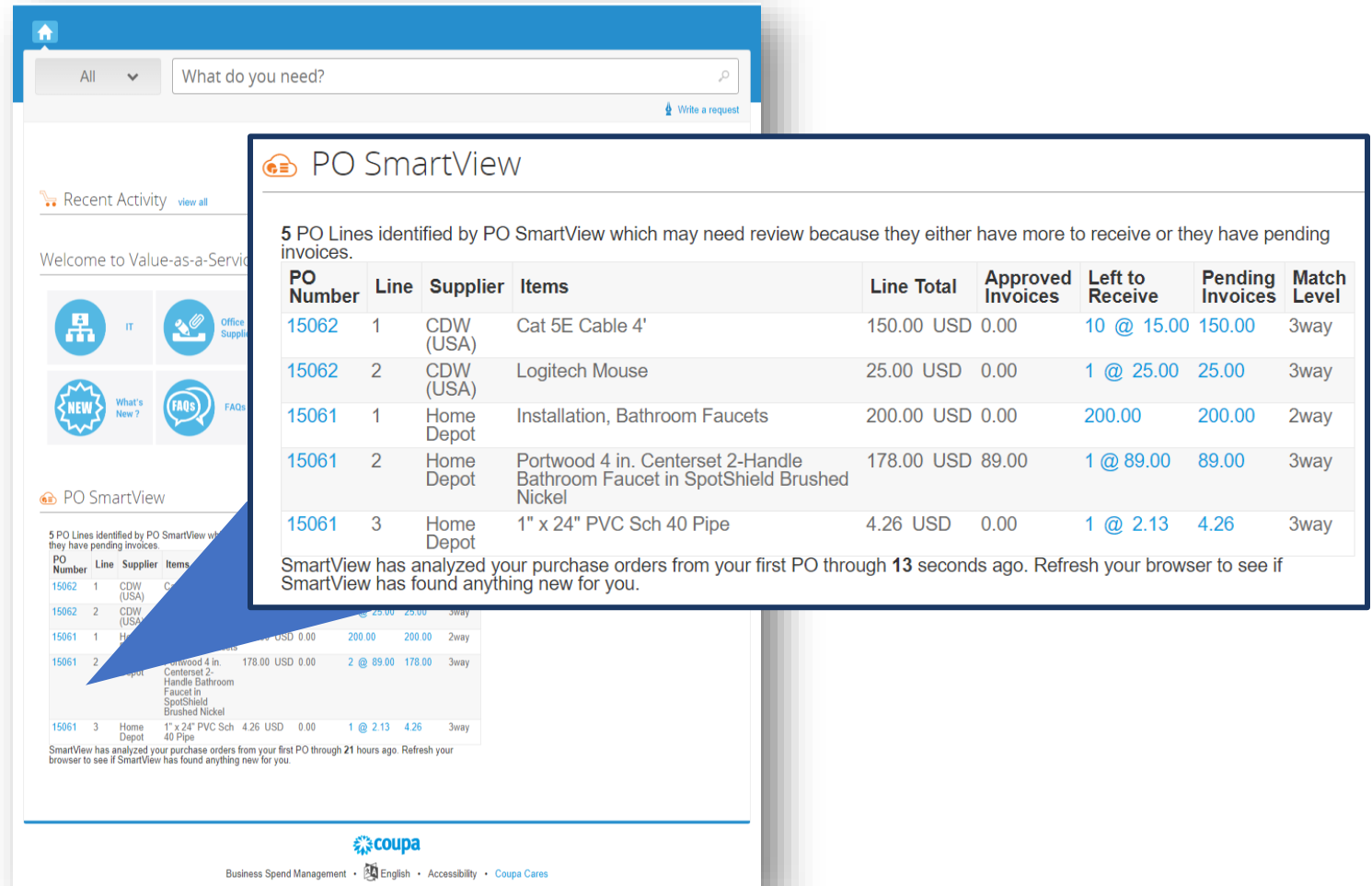
PO SmartView 3

* Coupa Apikey

Cancel Update

What to Expect After Enabling

- If you have unreceived PO activity or pending PO-Backed invoices, just go to your home page and scroll down to see the panel app view. If you do not have your own activity, you might be able to "Act As" another user to see it in action.
- Repeat the steps listed above in your production instance to enable the PO SmartView panel application in your production environment.
- After enablement, PO SmartView displays within the lower left frame of each user's Coupa home page and builds a cached view like this. 
- For additional support of DataMap's PO SmartView panel application, contact DataMap Support at coupa@datamapllc.com.
- Visit our website at <https://www.datamapllc.com/> to learn more about DataMap.



PO Number	Line	Supplier	Items	Line Total	Approved Invoices	Left to Receive	Pending Invoices	Match Level
15062	1	CDW (USA)	Cat 5E Cable 4'	150.00 USD	0.00	10 @ 15.00	150.00	3way
15062	2	CDW (USA)	Logitech Mouse	25.00 USD	0.00	1 @ 25.00	25.00	3way
15061	1	Home Depot	Installation, Bathroom Faucets	200.00 USD	0.00	200.00	200.00	2way
15061	2	Home Depot	Portwood 4 in. Centerset 2-Handle Bathroom Faucet in SpotShield Brushed Nickel	178.00 USD	89.00	1 @ 89.00	89.00	3way
15061	3	Home Depot	1" x 24" PVC Sch 40 Pipe	4.26 USD	0.00	1 @ 2.13	4.26	3way