

GETTING STARTED

PROFILE SET-UP

Buy-to-Pay (B2P) Login huit.harvard.edu/apps/finance
B2P Training Resources and FAQs b2p.procurement.harvard.edu
AP Support Email ap_customerservice@harvard.edu
AP Support Phone 617-495-8500 option 1



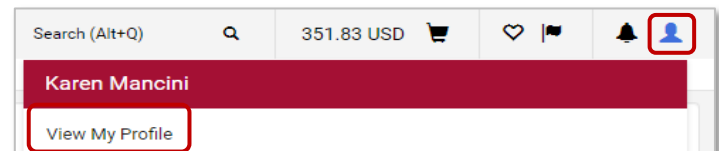
LOG ON TO BUY-TO-PAY

1. Go to HUIT Financial Systems Page <https://huit.harvard.edu/apps/finance>
2. Click the **Buy-to-Pay** link.

When you first log into B2P you should update your phone number as well as your Ship To address (this only needs to be completed once). This guide also details some additional default settings that you can update in your profile.

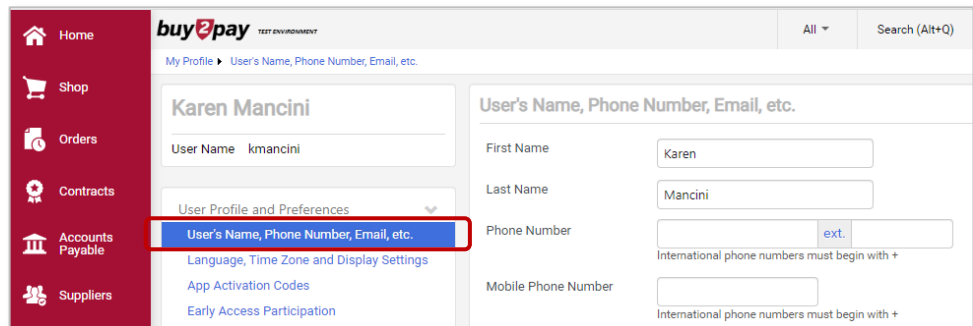
ADD/UPDATE YOUR PHONE NUMBER and SHIP TO ADDRESS

1. On the upper right corner of the screen click the User icon.
2. Click **View My Profile**.



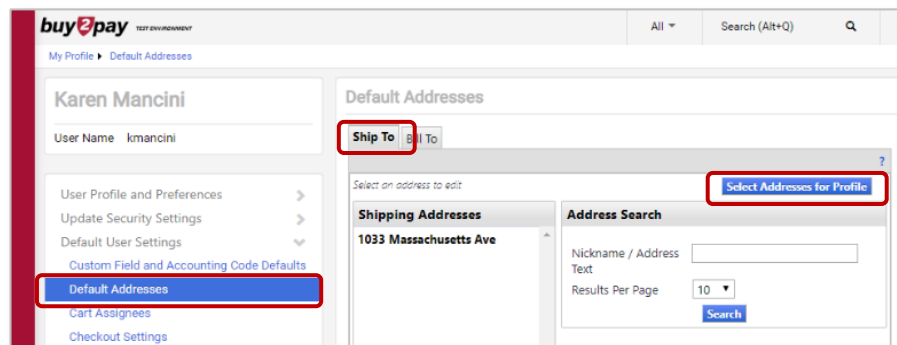
UPDATE PHONE NUMBER

3. Under **User Profile and Preferences**, click **User's Name, Phone Number, Email, etc.** to add or update your phone number.
4. Click **Save Changes**.



UPDATE SHIP TO ADDRESS

5. Under **Default User Settings**, click **Default Addresses**.
 - Click **Ship to** tab
 - Click **Select Addresses for Profile** and enter search terms. Tip: search by street number, e.g. 1033, 79, etc. to view available addresses
 - Click **Search**
 - Select the desired address and click **Save**

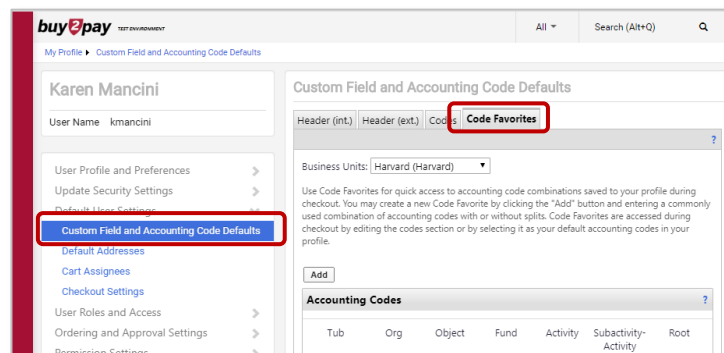


Note: You can add multiple shipping addresses to your profile.

SET UP DEFAULT USER SETTINGS (OPTIONAL)

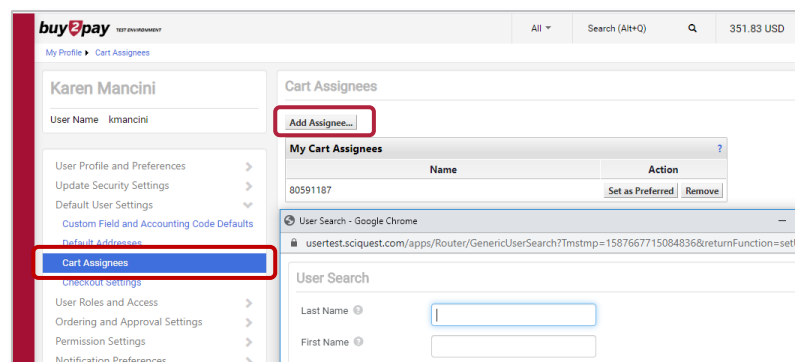
1. From your Profile page, click **Default User Settings**.
2. Chart of Account Favorites can be setup to help with entering coding.

- Click **Custom Field and Accounting Code Defaults**
- Click **Code Favorites** tab to enter Chart of Account Favorites
- Refer to the [Creating Chart of Accounts Favorites](#) quick reference guide for more details



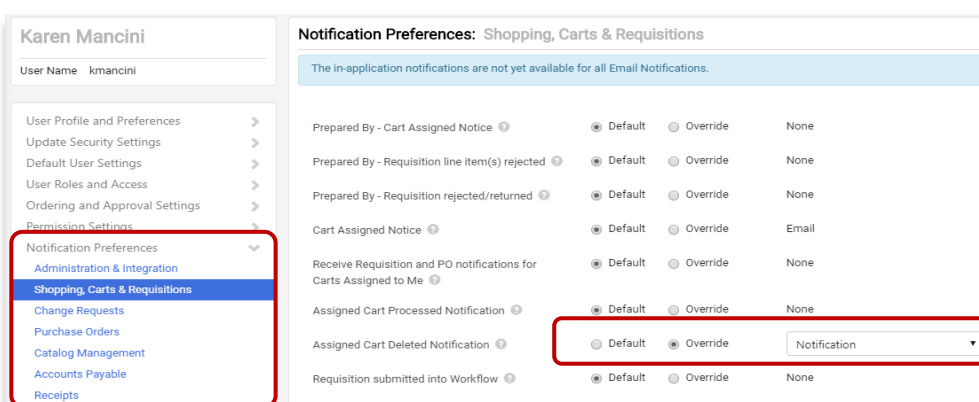
3. Shoppers and Requestors can create a *favorites* list of people to assign carts to so they don't have to search and select every time.

- Click **Cart Assignees**
- Click **Add Assignee**
- Input User Details and click **Search**
- Select preferred assignee from list
- Click **Set as Preferred**



UPDATE NOTIFICATION PREFERENCES (OPTIONAL)

1. Click **Notification Preferences**.
2. Select a category from the list to view notification options for the section.
3. Click **Edit section** in the upper right of the section.
4. Click **Override** and choose from the selections.
5. Click **Save Changes** in the lower right when done.



Refer to the [Managing Notifications](#) quick reference guide for more detail.

ADDITIONAL TRAINING MATERIALS

A variety of resources can be found on the [Buy-to-Pay website](#).

- Links to Online Courses
- Video Tutorials
- Quick Reference Guides