

# Supplier Portal Invitation

## What is the Supplier Portal?

- ▶ The B2P Supplier Portal provides self-service for companies and individuals with the ability to update and maintain their company information including contacts, addresses, tax documentation, service offerings, diversity status and more.
- ▶ The B2P Supplier Portal also provides opportunities to interact with Harvard's B2P environment including invoice submission, payment status inquiries, solicitation responses, and contract activity.
- ▶ An invitation to your supplier contact is the simplest, most efficient way to get your supplier started in the Supplier Portal.

## Inviting a Supplier

1. Select **Invite New Supplier** in the **Supplier Tools** widget on the Buy-to-Pay Dashboard.



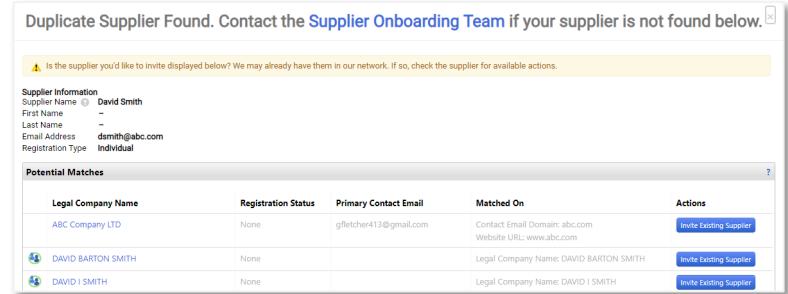
2. Complete the required fields (\*), including:

The 'Add Supplier' form includes the following fields: Registration Type (dropdown, set to Individual), Supplier Name, US Tax ID Number (SSN/TIN), DUNS, First Name, Last Name, Email Address, Confirm Email Address, and Comment. A note at the bottom states: '800 characters remaining. Please make sure Invitation Comment placeholder is set up in email setting.' A legend indicates that fields with an asterisk are required.

- **Registration Type** (Select **Company** or **Individual** based on the entity type you'd like to invite)
- **Supplier Name**
- **Email Address**
- **Confirm Email Address**

**Please note:** *First Name* and *Last Name* are NOT required but can be included if the company contact is known.

3. Click **Invite Supplier to Register**. Possible duplicate suppliers appear onscreen. Browse through the **Potential Matches** that appear to avoid duplication. Select the existing supplier, as appropriate.



4. Click the **Supplier Onboarding Team** link at the top of the screen if your supplier does not appear.

5. A **Success** message appears if no **Potential Matches** are found.



6. The company or individual receives an email notifying them of your invitation request. The email – [ap\\_supplieronboarding@harvard.edu](mailto:ap_supplieronboarding@harvard.edu) – includes a **Register Now** link that guides them through account creation and registration in the Harvard Supplier Portal.

**Note:** If the supplier is required to provide additional tax information, they will receive a separate login email from Harvard's tax determination system inviting them to complete a profile.