Supplier Portal Brown Bag Session

P2P Operations Team | March 2022
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<th>Agenda</th>
<th>Supplier Portal Overview</th>
<th>Training Resources</th>
<th>Support</th>
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<td>• Training videos&lt;br&gt;• B2P Training Page Contents&lt;br&gt;• Quick Reference Guides, FAQs</td>
<td>• Supplier support&lt;br&gt;• Key resources</td>
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Buy-to-Pay (B2P) Modules

SUPPLIER PORTAL

SOURCING

CONTRACTS

ePROCUREMENT

SPEND ANALYTICS
Today’s Focus:
Considerations for Inviting/Requesting a Supplier

• Payment Eligibility
  – Prior to any formal agreements being made, schools or units must confirm an individual is legally allowed to be paid
  – For Foreign Individuals: Visa type impact, location of activity impact
  – See Most Commonly Seen Visa Types of Foreign National Guest Speakers and Independent Contractors Policy

• Determine best approach
  – Invitation vs. Request vs. Proxy
  – Decision Tree: Invite vs. Request
Onboarding New Supplier* Options

• Inviting a Supplier
• Requesting a Supplier
• Proxy Registration

*Term is used for both individuals & companies and must be active in B2P to create requisitions and process invoices
Supplier search

- Inviting a new supplier: Always search first! Are they already in B2P? Be sure to invite under existing profile.
  - Supplier search: Quick Reference Guide (QRG)
Inviting a Supplier

- **Invitation Type** (critical!):
  - Individual
  - Company

- Questions throughout the registration are dynamic, they will change depending upon supplier’s answers (ie: No Entry visa type)

- Supplier responsible for providing their own contact, billing, tax information

- Supplier must **Certify & Submit**, pushing the registration into workflow for review

- **Supplier Experience** Tip Sheet (view supplier registration from supplier’s POV)

- **Non-US Individual** Tip Sheet

- Duplicate flags:
  - Read through the potential duplicates listed on your warning screen
  - If not a true duplicate, let us know and we will bypass the invitation warning for you (email: ap_supplieronboarding@harvard.edu with the subject line “Duplicate Invite”
Duplicate Warning

Results not found. Add a supplier, invite a supplier, or Request a supplier

Duplicate Supplier Found. Contact the Supplier Onboarding Team if your supplier is not found below.

- **HARVARD MANAGEMENT COMPANY**
  - Registration Status: In Progress
  - Primary Contact Email: dheleon@harvard.edu

- **Central Asian Student Association Harvard**
  - Profile Complete: TH2456@h.harvard.edu

- **FUNDACION CENTRO DE INVESTIGACION DE HARVARD AMERICA LATINA**
  - Invited: global@hbs.edu

**Matched On**
- Legal Company Name: HARVARD MANAGEMENT COMPANY
- Doing Business As (DBA): HARVARD MANAGEMENT COMPANY TRUSTS
- Alternate Supplier Name: HARVARD MANAGEMENT COMPANY TRUSTS
Welcome to the Harvard University Supplier Portal!

You (or your company) have been invited to register as a supplier with Harvard University.

Please note:
- Registration in the Harvard University Supplier Portal does not guarantee business or payment.
- Harvard University’s terms and conditions can be found here.

Individuals:
- When completing the registration, you will be asked for your Legal Company Name, this should be populated with your first and last name.

For support and technical questions:
- For technical issues related to logging into the portal, adding attachments, browser errors, and other portal related problems, please contact Jaggear customer support here.
- For more about doing business at Harvard, current and future sourcing events, diversity initiatives, and other related procurement information, please visit our website here.
- For any other questions, please email the Harvard University Supplier Onboarding Team at ap_supplieronboarding@harvard.edu

Required to Start Registration

Legal Company Name * 4ALLPROMOS LLC

★ Required to Complete Registration
Supplier Registration – Menu items ct’d

For Individuals, the legal company name will be your full name.

Doing Business As (DBA)

Does your business have a DUNS number?

The Data Universal Numbering System or DUNS Number is a nine-digit identification number assigned to over 100 million businesses worldwide.

Need a DUNS Number?
Visit Get a D&B Number to obtain more detailed instructions on applying for your DUNS Number.

Dun & Bradstreet Number (DUNS)

603034062

Note: US Citizens or permanent residents select ‘Individual/Sole Proprietor’, Foreign Individuals select ‘Foreign Individual’, Foreign Entities select ‘Non-US Based Entity’.

Be sure to provide the appropriate Legal Structure information as it is currently stated with the IRS on your tax documents.

Legal Structure

Limited Liability Company - C Corporation

Please use the 9-digit format only. If you have a Foreign Tax ID, navigate to the Tax Information section and enter it in the applicable field.

US Tax ID Number (SSN/TIN)

Website

http://www.4allpromos.com

Required to Complete Registration

Next  Proceed to Certify and Submit  Save Changes
Suppliers may choose to submit their own W9 by uploading a local copy, OR sign. If choosing sign electronically, Adobe will notify them until they complete the signature.
Supplier Registration – Payment Options

A supplier’s legal structure dynamically changes this page. They are offered payment methods based on whether they are a company / individual.
Supplier Registration - Payment Types

• **Zelle**
  – US-banked individuals only
  – [Tip Sheet](#)

• **Paymode-ACH**
  – US-banked companies
  – No banking stored locally, no access to banking
  – Companies may register here: [https://www.paymode.com/harvarduniversity](https://www.paymode.com/harvarduniversity)

• **Paper Check**
  – Default for all suppliers if not able to accept Zelle (Individual) or Paymode-ACH (Company)
Supplier Requests – Harvard User

• “Request New Supplier” - Recommended for:
  – **Temporary Vendor**: using Request Form is appropriate here, designates non-service payment, strictly for refund purposes, one-time payment (30 days)
  – **BER Vendor**: Business expense reimbursement (foreign individuals only, see requirements)
  – **Foreign Individual**: Allows department to fill out a shell profile for a foreign individual > we kick off a GLACIER invitation > we then invite individual to portal (prevents some of the back & forth)
  – **Proxy Request**: ALL information must be submitted by Harvard user, “white glove” treatment, no invitation goes to supplier

• “Supplier Maintenance Request” – Recommended for:
  – Edits to an existing supplier’s profile on their behalf
  – **Tip Sheet**
“My Supplier Requests” Page
Supplier Request Status - View History Feature

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### Questions - General Request Information

- **On This Page**
  - Request Information (3)
  - Supplier or Individual Name (1)
  - Proxy Question (1)
  - Additional Comments (1)

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### Request Information

- **Filter History**

<table>
<thead>
<tr>
<th>Date</th>
<th>User</th>
<th>Action</th>
<th>Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/9/2021 11:18:31 AM</td>
<td>System</td>
<td>Form Request Approval Complete</td>
<td>Supplier Registration Workflow</td>
</tr>
<tr>
<td>8/9/2021 11:18:31 AM</td>
<td>Hillary Tan</td>
<td>Form Request Approved</td>
<td>Supplier Registration Workflow</td>
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### Filter History

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<tr>
<td>2/3/2022 2:33:16 PM</td>
<td>Yuri Landaverde</td>
<td>Registration Returned to Requester</td>
<td>Supplier Registration Workflow: Duplicate Supplier Name</td>
</tr>
<tr>
<td>2/3/2022 10:37:13 AM</td>
<td>Yuri Landaverde</td>
<td>Form Request Assigned</td>
<td>Supplier Registration Workflow: Duplicate Supplier Name</td>
</tr>
<tr>
<td>1/31/2022 2:28:34 PM</td>
<td>System</td>
<td>Form Request Submitted</td>
<td>Supplier Registration Workflow</td>
</tr>
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**Note:**
We can't accept the request because the supplier already exists, and it will create a duplicate. Please submit a supplier maintenance request if you need to update the supplier.
“View History” is a great way to get real-time updates to a supplier’s status. View last updates, comments from SOT
Dear Teri DeLeon,

Your supplier request was returned by: DeLeon, Teri

The reason for the return was: Testing Return notification 3/11/22

To modify this request and resubmit after corrections, click the link below:

Click here to view the request in your organization's site

Thank You,

Harvard University
ap_supplieronboarding@harvard.edu
+1 617-495-8500 ext. 3
Supplier Onboarding Team – Roles & Responsibilities

• All supplier adds, changes vetted by central AP Supplier Onboarding team
• Registrations must be submitted to initiate workflow (supplier selects “certify & submit”)
• Request forms manually reviewed to create profiles, initiate reactivations, validate documents
• Name change, TIN change, Reactivation – W9, W8 required
• Review & Validate:
  – Duplicate entries
  – Address & data formatting standards
  – Tax information and legal structure
  – Visa status (non-US individuals)
  – Payment method defaults
  – Oracle sync compatibility
• Approves/Returns/Rejects request
• All completed registrations are sent through automated workflow, checking for:
  – Duplicates
  – Compliance: OFAC, Sanctions lists
## Supplier Inactivation Guidelines

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<th>Vendor Type</th>
<th>Inactivation</th>
</tr>
</thead>
<tbody>
<tr>
<td>All vendors</td>
<td>18+ months no activity</td>
</tr>
<tr>
<td>Temporary</td>
<td>30 days</td>
</tr>
<tr>
<td>BER (<a href="#">see requirements</a>)</td>
<td>90 days</td>
</tr>
<tr>
<td>Foreign Entity</td>
<td>3 years from date of W8 signature</td>
</tr>
<tr>
<td>Foreign Individual (1042-S)</td>
<td>Visa-dependent (<a href="#">auto-inactivation at time of Visa expiration</a>)</td>
</tr>
<tr>
<td>1042-S, No Entry visa</td>
<td>90 days</td>
</tr>
<tr>
<td>1042-S, ADVTR</td>
<td>90 days</td>
</tr>
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## Agenda

| Supplier Portal Overview | • Foundational overview  
| | • Onboarding options  
| | • Review process  
| Training Resources | • Training videos  
| | • B2P Training Page Contents  
| | • Quick Reference Guides, FAQs  
| Support | • Supplier support  
| | • Key resources  

Training Resources

- Harvard Training Portal Courses
- B2P Training Page: b2p.procurement.harvard.edu
- Quick Reference Guides (QRGs)/Tip Sheets: Supplier Portal, ePro/AP, FAQs
- Video tutorials tab on training site
- **Office Hours** – Tuesdays, Thursdays 10am-11am
B2P Blog Posts

- B2P Blog – Be sure to subscribe! [https://b2p.procurement.harvard.edu/blog](https://b2p.procurement.harvard.edu/blog)
- Tip of the week 2/17: [Link to post](#)

Supplier Portal Tip of the Week!

February 17, 2022

Looking for a supplier’s registration status? [Download the Supplier Experience QRG](#) for more information and feel free to share it with suppliers. A supplier must complete all sections of their profile (including Certify & Submit) for the profile to be pushed to the next step in workflow for review by AP Supplier Onboarding.

What does each Registration Status mean?
- **Invited** - Supplier has been invited, but has not yet taken action to log in and complete the profile.
- **In Progress** - Supplier has partially filled out the profile, but has not submitted it.
- **Profile Complete/Approved** - Supplier has completed their information, and it is ready to be reviewed by Supplier Onboarding. If they already have a green checkmark next to their name, it means we’ve reviewed their info and they are ready for shopping.

Don’t forget! View History is a great tool to see what, when, and how a supplier’s information was last updated.
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- **Supplier Portal Overview**
  - Foundational overview
  - Onboarding options
  - Review process

- **Training Resources**
  - Training videos
  - B2P Training Page Contents
  - Quick Reference Guides, FAQs

- **Support**
  - Supplier support
  - Key resources
Support for suppliers

- Login issues, password resets, technical support
- JAGGAER support request: https://www.jaggaer.com/submit-supplier-support-request/
- JAGGAER phone number: +1 (800) 233-1121
Service Now Ticketing

To maximize efficiency in your support request, here is key info to include in a ticket to our AP/Supplier teams:

• **Supplier Onboarding Tickets** (ap_supplieronboarding@harvard.edu)
  – Supplier#
  – Supplier name
  – What type of request: maintenance/New registration/Invitation?
  – If question about invitation: name, email address, any element of the address that would help us distinguish whether/not it is a true duplicate

• **Accounts Payable Tickets** (ap_customerservice@harvard.edu)
  – Vendor name
  – Invoice#
  – PO#
Appendix
Supplier Onboarding Process Overview

1. Supplier need identified
2. Invitation
3. Supplier completes registration
4. Submitted registration includes required documentation
5. Supplier Onboarding team vets documentation, approves supplier profile

OR: Request Form
Harvard User View - Supplier Payment / Invoice Settings

View payment terms, payment methods, and other key supplier details here (hover over icons)
Harvard User View - Supplier Icon Key

**Paygroup**
- Digital Disbursement (Registered with Zelle)
- Paymode
- Check

**Payment Terms**
- E.g. Immediate, Net 30
  - Note: special handling is not required if the payment term is 'Immediate'

**Foreign Entity Type**
- E.g. Corporation, Estate, Government or International Organization, Partnership, Private Foundation, Tax-Exempt Organization, Trust

**Tax Residency**
- E.g. AA: Aruba, CA: Canada, ~270 more countries

**Vendor Type**
- 1099 Supplier
- 1042S Supplier
- BER (Business Expense Reimbursement) Supplier
- Debarred Supplier
- Supplier
- Individual
- Temporary Supplier
Additional Resources

• Guidance for Foreign Individuals & Entities:
  – Type of W8 depends on supplier’s legal structure
  – IRS & NRA Resources - [W8 Instructions](#), [NRA W8 resources](#)
  – NRA/Tax, GLACIER Resources: [https://nratax.ocfinance.harvard.edu/](https://nratax.ocfinance.harvard.edu/)
  – Presentation: [link here (specific to foreign individual supplier setups)](#)
## Key Resources

<table>
<thead>
<tr>
<th>Department/Specialty</th>
<th>Contact</th>
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</table>
| **AP Customer Service**                  | • Phone: 617.495.8500 opt 1  
   • Email: AP_CustomerService@Harvard.edu  
   • AP inquiries  
   • Credit Memos (include PO#, GL details if no PO)  
   • General AP training questions |
| **AP Invoice Processing**                | • Email: AP_Invoices@Harvard.edu  
   • B2P invoices only  
   • No need to submit PR invoices to AP, they are automatically processed in B2P and do not require keying  
   • No AP inquiries, just invoices |
| **Buy-to-Pay (B2P)**                     | • For further inquiries, FAQs, and training resources, click [here](#)  
   • QRGs (quick reference guides) |
| **Supplier Onboarding**                  | • Phone: 617.495.8500 opt 3 (opt 1 can also assist)  
   • Email: AP_SupplierOnboarding@Harvard.edu |
| **Travel, Card Services, Reimbursements**| • Contacts: [https://travel.harvard.edu/contact](https://travel.harvard.edu/contact)  
   • Website: [https://travel.harvard.edu/resources](https://travel.harvard.edu/resources) |
| **Treasury (OTM) / Cash Management (CMO)**| • Website: [https://otm.finance.harvard.edu/pages/cash-management](https://otm.finance.harvard.edu/pages/cash-management)  
   • Check inquiries, including stop payment, void  
     • Email: checkingquiryform@harvard.edu  
     • Website: [https://otm.finance.harvard.edu/request-stop-payment-check](https://otm.finance.harvard.edu/request-stop-payment-check)  
   • Wire inquiries, status, wire paperwork:  
     • OTM_WireTransferInquiry@harvard.edu |
| **Non-Resident Alien (NRA)/Tax**         | • General NRA Tax Website: [https://nratax.oc.finance.harvard.edu/](https://nratax.oc.finance.harvard.edu/)  
   • Virtual 1:1s: [https://nratax.oc.finance.harvard.edu/schedule_an_appointment](https://nratax.oc.finance.harvard.edu/schedule_an_appointment)  
   • Email: nratax_ufs@harvard.edu |