

# **Buy-to-Pay: Supplier Portal Overview Training**

January 1, 2024

# Overview

Buy-to-Pay (B2P) is the University-wide, end-to-end eProcurement system, encompassing Accounts Payable, Supplier Onboarding, Purchasing, Contract, and Sourcing activities.

In this course, we will focus on the Supplier Onboarding Process that takes place in the B2P Supplier Portal.

- The B2P Supplier Portal provides self-service capabilities for entities and individuals to upload and/or maintain their supplier information including contacts, addresses, tax documentation, diversity status, and more.
- The B2P Supplier Portal is free; there are no charges or fees for suppliers to use.

# Course Objectives

This course provides B2P users with key information that is required for requesting the Supplier Portal User Role.

After you complete this course, you will be knowledgeable in:

- Searching for a supplier in B2P
- Inviting a supplier
- Requesting a supplier
- Updating supplier information (maintenance)
- Checking status
- Locating additional support opportunities

# Supplier Portal User Role

Users with the **Supplier Portal User Role** can invite a supplier to Buy-to-Pay (B2P). If you do not have this role and would like to request it, please follow the steps below:

Step 1: Complete the following **required** courses:

- Buy-to-Pay: Supplier Portal Overview (this course)
- Introduction to ROPPA, course #EUR1486 (self-paced)
  - This course is available for enrollment on the [Harvard Training Portal](#)
  - Note: Supplier Portal users should take the Purchaser Track

Step 2: After you have completed the required courses listed above, contact your School/Dept. Authorized Requestor to submit the request to HUIT Client Services.

# B2P Access & Navigation

Once you are granted the Supplier Portal User Role, additional supplier tools become available. B2P can be accessed from the [Financial Systems homepage](#). Once you log in with your Harvard Key, you will see the B2P homepage.

Access Supplier features from the B2P Homepage:

- Access the Supplier Dashboard from the left navigation
- Access the Supplier Tools section (on Homepage) which includes quick links to common actions:
  - **Search** for a Supplier
  - **Invite** New Supplier
  - **Request** New Supplier
  - Supplier **Maintenance** Request

**Note:** you may need to scroll depending on your display settings.



# Supplier Onboarding and Registration

The preferred method for onboarding a supplier is to use an invitation, however, there are special exception scenarios that allow a request to be submitted on behalf of the company or individual.

# Supplier Onboarding and Registration – Inviting a Supplier

When inviting a supplier:

- The Supplier Portal User can invite a supplier directly from the B2P Homepage.
- The Supplier Portal User will need to know the (legal) company or individual name, and an email address.
- The email recipient will be guided through an account creation process, using the B2P (Jaggaer) Supplier Network, to complete the registration.

# Supplier Onboarding and Registration – Supplier Request Form

Supplier Request forms facilitate exceptions and scenarios that otherwise cannot follow the standard invitation process, including:

- Proxy / White glove invitations (example: VIP)
- Foreign Individuals (non-US payees) with complex Visa documentation requirements (examples: Dignitaries)
- Harvard Registered Students
- Recipients of Business Reimbursement Expenses



# Supplier Onboarding and Registration Process

The following slides will detail the process for completing the invitation process, including when to initiate the invitation process using a Supplier Request Form.

# Before Inviting Supplier

1. You must **search** for the supplier in B2P before inviting or requesting a new supplier to **avoid adding a duplicate supplier**.

- Simple search – Enter search terms such as Legal Company name or Supplier ID
- Advance search – Provides additional options such as type, class, and diversity status, etc.
- Tip - Always search by legal name and variants of legal name, search inactive and active supplier records.
- Refer to the Quick Reference guide for more information on searching.

**What to do if you find a duplicate supplier but still want to proceed with inviting this supplier?**

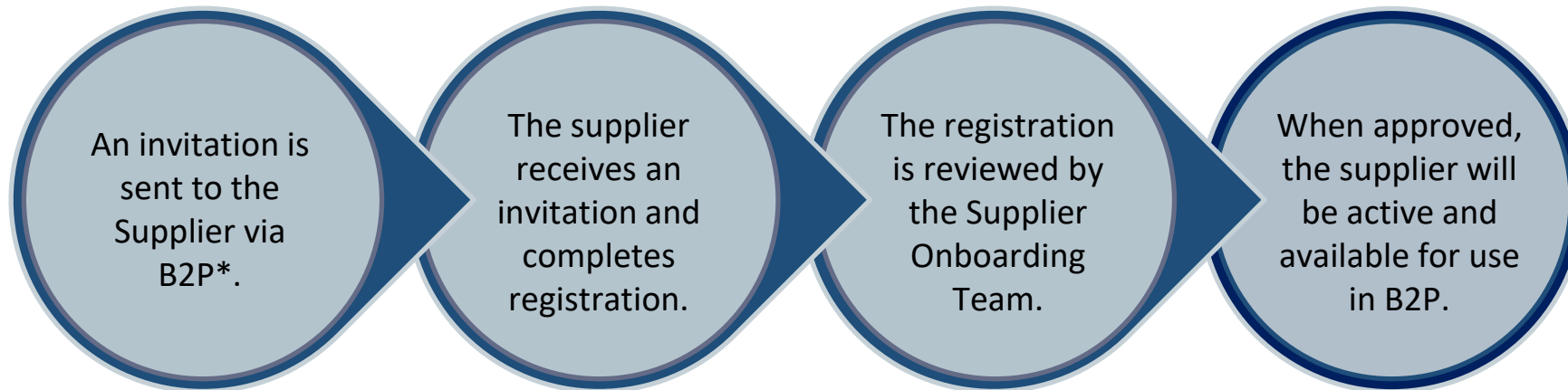
- Complete a Supplier Request Form, which routes to the Supplier Onboarding Team to review and action as appropriate.

2. Before any agreements are made, schools or units must **confirm payment eligibility** (a supplier is legally allowed to be paid).

- Verify this supplier is legally allowed to be paid or reimbursed by Harvard for activities in the U.S.
- Review the policies for Honoraria and Reimbursements to Foreign Individuals and Commonly Seen Visa Types.
- For Foreign Individuals: Visa type, location of activity, and other factors may affect our ability to pay these suppliers.

# Invitation Process

An invitation can be sent to an individual/company, inviting them to self-register in the B2P Supplier Portal.



\*The link to invite a supplier can be found on the B2P Homepage in the Supplier Tools.

# Invitation Process – What to Expect

1. When you send a supplier an invitation, you must provide their name, email address, and select the supplier type (company or individual). **Important:** Company and individual profiles require different information and choosing the wrong one can cause delays.
2. The supplier will receive an email:
  - To create a login and password to the supplier portal where they can complete their registration.
  - Confirming they have submitted their registration. **Note:** this does not mean the Supplier Onboarding Team has approved the record yet.
  - If needed, reminder notifications are sent periodically to complete registration.
3. Once the supplier has successfully submitted their registration, their profile will go into a queue to be reviewed by the Supplier Onboarding Team to ensure all the information is correct.
4. After the registration has been approved by the Supplier Onboarding Team, the supplier will be active and available for use in B2P.

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

# Supplier Request Form – Exception Scenarios

As noted earlier, there are special **exception scenarios** where a request can be submitted on behalf of the company or individual, including:

- Business Reimbursement Expenses for Foreign Individuals (BER)
- Temporary Vendors (Refunds)
- Proxy Registration for white glove & special situations
  - Supplier Portal User must collect all required supplier documentation.
- International/Non-US payees
  - If a 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.
- Harvard Registered Students (US Citizens and Permanent Residents Only)

# Supplier Request Form Process

A Supplier Request Form can be submitted if a supplier qualifies under one of the exception scenarios listed on the previous page.



\*The Supplier Request Form can be found on the B2P Homepage in the Supplier Tools.

# Supplier Request Form Process – What to Expect

1. The Supplier Request Form is dynamic and will ask for information based on:
  - Individual or Company
  - US or International/non-US
2. After review, the Supplier Onboarding Team will either:
  - Return or reject the request (with explanation).
  - Approve and transition the request to an invitation.
  - Approve the supplier for use.

# Supplier Onboarding Options Summary

The following grid summarizes what a Supplier Portal Role can initiate, including the required information needed to onboard the supplier successfully:

Registration Type	Description	Required Information Needed
Invitation: New Supplier	An invitation to an individual or company, inviting them to self- register on in the B2P Supplier Portal.	<ul style="list-style-type: none"><li>• Company or Individual</li><li>• Legal Name</li><li>• Email Address</li></ul>
Request Form: New Supplier	<p>Complete the request form in B2P for the Supplier Onboarding team to create a supplier record in B2P for the following vendor types:</p> <p>Temporary Vendors, Refund vendors, Business Expense Reimbursement (BER) vendors, and Harvard Registered Students.</p>	<ul style="list-style-type: none"><li>• Company or Individual</li><li>• Legal Name</li><li>• Email Address</li><li>• Remit to Address</li><li>• Citizenship</li><li>• Additional information may be required depending upon selection of Temporary or BER Vendor</li></ul>
Request Form: Non-US payee	<p>Complete the request form in B2P for the Supplier Onboarding Team to send the:</p> <p>1.) B2P invitation 2.) Tax determination system invitation</p>	<ul style="list-style-type: none"><li>• Company or Individual</li><li>• Legal Name</li><li>• Email Address</li><li>• Citizenship</li><li>• Visa Type (or NA if not known)</li></ul>
Request Form: Proxy Request	<p>Complete the request form on behalf of an individual or company requiring special assistance to register as a supplier.</p> <p>This is also known as “white glove registration”.</p> <p>Example: No internet access, VIP</p>	<ul style="list-style-type: none"><li>• Company or Individual</li><li>• Legal Name</li><li>• Email Address</li><li>• SSN/TIN</li><li>• Date of Birth</li><li>• Remit to Address</li><li>• Required tax documentation</li></ul>



# Supplier Maintenance in B2P

The following slides will provide key information about the Maintenance Process, how to check a Supplier Profile Status, and Supplier Inactivation.

# Maintenance Process

The Supplier Maintenance Form\* can be used for:

- Complex or large organizations with multiple payment sites (ex. hospitals, universities, hotels, etc.)
- Add or remove an address
- Reactivate, inactivate, or extend deactivation date so final payment can be made
- Supplier Name Change (must include proper documentation)
- Proxy tax documentation for Non-US Payee

The Supplier Onboarding Team will update the supplier record after reviewing request.

**Note:** Do not use maintenance form to request new suppliers!

\*The Supplier Maintenance Form can be found on the B2P Homepage in the Supplier Tools.

# How to Check Supplier Profile Status

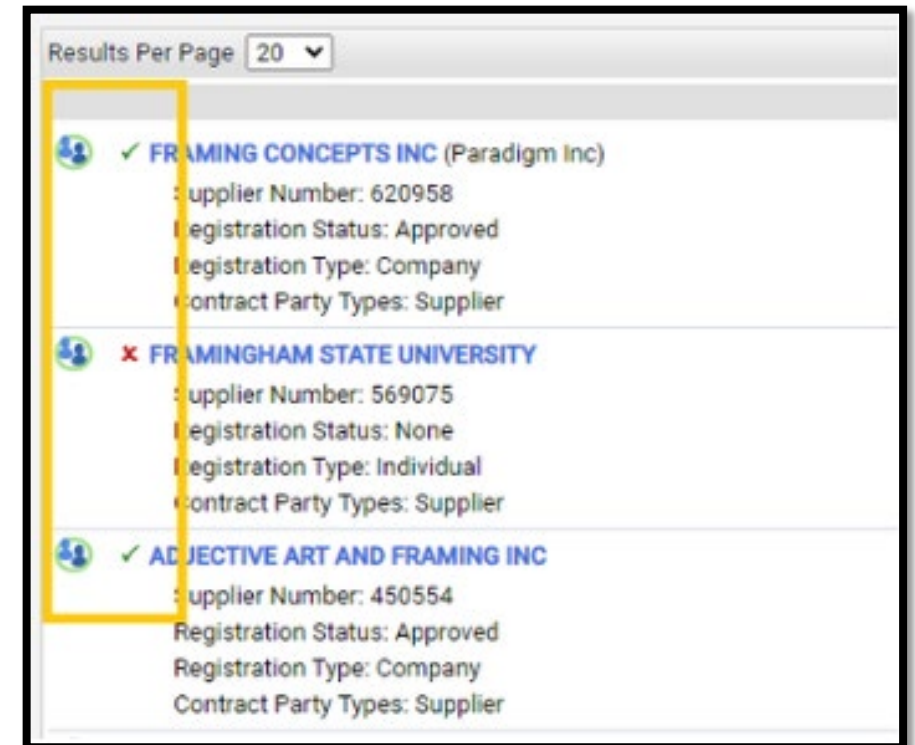
**Active for Shopping:** Indicates whether a supplier is available to create requisitions against.

- Green checkmark – Active
- Red “x” – Inactive

**Registration Status:** Indicates if a supplier has logged in and completed their registration.

- **Approved:** The supplier Onboarding Team has reviewed and approved the Supplier.
- **None:** Supplier exists in B2P and but has not been invited to the Self-Service Portal to register.
- **Invited:** The supplier was sent an invitation to complete their profile, but the supplier has not started the registration process.
- **In Progress:** The supplier was never invited, or they started their registration but has not completed it.
- **Profile Complete:** Supplier completed their registration, and it is in the queue for the SOT to review
- **Rejected:** Supplier team rejected the supplier registration (this is usually because the record is a duplicate). Review history for guidance on what supplier record to use.

**Tip:** Navigate to the supplier’s profile and click on View History at the bottom left of their profile. This feature shows you exactly what happened with the profile, along with a timestamp.



Results Per Page 20

✓	FRAMING CONCEPTS INC (Paradigm Inc)	Supplier Number: 620958	Registration Status: Approved	Registration Type: Company	Contract Party Types: Supplier
x	FRAMINGHAM STATE UNIVERSITY	Supplier Number: 569075	Registration Status: None	Registration Type: Individual	Contract Party Types: Supplier
✓	ADJECTIVE ART AND FRAMING INC	Supplier Number: 450554	Registration Status: Approved	Registration Type: Company	Contract Party Types: Supplier

# Supplier Inactivation

Suppliers must be active in B2P to process a transaction.

Suppliers will be inactivated based on vendor type.

- Vendor Type Inactivation:

- All vendors: 18+ months no activity
- Temporary: 30 days
- Business Expense Reimbursement (BER): 90 days
- Foreign Entity: 3 years from date of W8 signature
- Foreign Individual (1042-S): Visa-dependent (auto-inactivation at time of Visa expiration)
- 1042-S, No Entry visa: 90 days
- 1042-S, ADVTR: 90 days

- To view the Inactivation Date, go to the Supplier record > About > General

Suppliers > Manage Suppliers > Search for a Supplier > Supplier Profile - 12.2 FOREIGN INDIVIDUAL

< Back to Results 1 of 1 Results

### 12.2 FOREIGN INDIVIDUAL

Supplier Number 646333  
Registration Status Profile Complete  
Registration Type Individual

About  
Supplier 360  
Summary  
**General**  
Contacts and Addresses  
Workflow and Review  
View History

#### General

##### Company Information

Supplier Name	12.2 FOREIGN INDIVIDUAL
Doing Business As (DBA)	
Alternate Supplier Name	
Country of Origin	
Aliases	
Supplier Number	646333
Oracle ID (DO NOT EDIT)	5071233
JAGGAER Indirect Supplier ID	1003381250
Is this Supplier instance an Organizational Node?	No
Contract Party Types	Supplier
Active for Shopping	✓
Business Unit Vendor Id(s)	No Values Assigned.
Are you exempt from backup withholding?	-
Backup Withholding Attachment	<input type="button" value="Select file"/> Drop file to attach, or browse.
Web Site URL	
RSS Feed URL	-
Profile Update Review Needed (Not visible to Supplier)	-
VENDOR TYPE (Not visible to Supplier)	1042S Vendor
INCOME TAX TYPE (Not visible to Supplier)	
INACTIVATION DATE (Not visible to Supplier)	10/21/2025

# Resources

## B2P Website\*

- Quick Reference Guides
- Frequently Asked Questions
- B2P Blog – subscribe to receive weekly updates
- B2P Support contact information

**Supplier Onboarding Team (SOT)** for questions related to supplier records, status, or requests.

Phone: (617) 495-8500 (option 3)

Email: [AP\\_SupplierOnboarding@harvard.edu](mailto:AP_SupplierOnboarding@harvard.edu)

**International Payee Tax Compliance (IPTC) team** for questions related to non-US payees and the tax determination system.

Phone: (617) 495-8500 (option 5)

[International Payee Tax Compliance website](#)

[Jaggaer Supplier Support website](#) for Supplier assistance.

Phone: (800) 233-1121

\*A PDF copy of this presentation is available on the B2P website.

# Course Objectives Summary

Let's review the key information that was provided in this course:

- Searching for a supplier in B2P
- Inviting a supplier
- Requesting a supplier
- Updating supplier information (maintenance)
- Checking supplier profile status
- Locating additional support opportunities

# You Have Completed the Course!

- Exit Course
- Complete the attestation in HTP – you will be prompted once you exit the course. Only mark YES when you have completed the course.
- As a reminder: to request the Supplier Portal Role in B2P, you must complete the required courses, and then contact your School/Dept. Authorized Requestor to submit the request to HUIT Client Services.