

The logo for buy2pay, featuring the word 'buy' in black, a red shield with a white number '2' inside, and the word 'pay' in black.

buy²pay

A close-up, slightly blurred image of a white computer keyboard, showing several keys like the arrow keys and function keys. The image is partially obscured by a blue circular graphic on the right side of the page.

What's Changing?

A guide to the new shopping experience

New screen layouts and navigation

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What's Changing?

All users will see new screen layouts and navigation for Searching the Catalog, Shopping Carts, Checkout Process, Requisitions, and POs

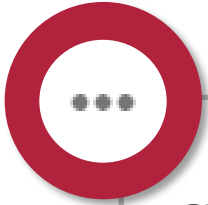
Things that DO NOT change:

- Document Search
- PR and NR Forms
- Approval Folders
- Supplier Icons
- **Receipts screens and process** - *although the PO will have the new look & feel, the screens for creating a receipt are unchanged*
- **Other B2P modules: Supplier Portal, Sourcing, TCM**

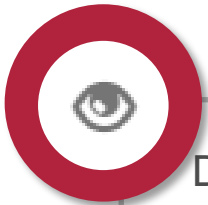
Some basics...



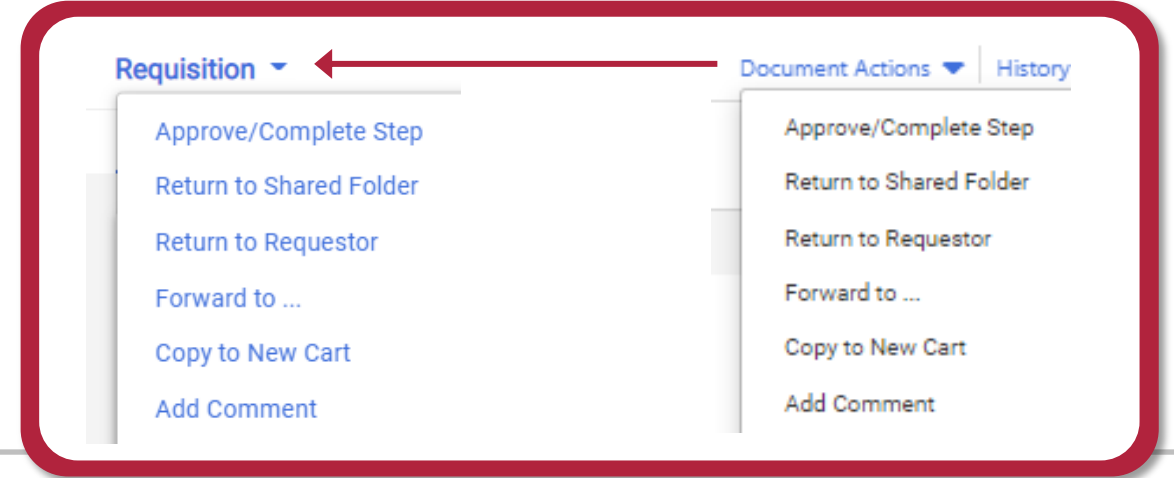
Click to **edit** information in a panel



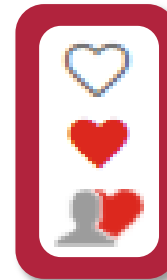
Click to display **additional options** available for individual items or section



During the Checkout Process, click to filter the sections in the **Summary** tab to view the accounting codes and line items



The menu options previously found under **Document Actions** are now found by clicking the document type name in the top-left









- Click to **add** an item to Favorites
- Item is a user's **personal** Favorite
- Item is a **shared** Favorite









Use the scroll bar on the *far right* of your screen to navigate through the requisition and PO

Icons





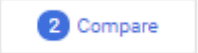

General

-  Shared cart
-  The recommended item has been added to a requisition in the last 30 days
-  Item requires sourcing
-  Item is associated with a contract
-  Click to view further information about an item
-  Click to view help information

Navigation and View

-  Collapse section
-  or  Expand section
-  Show shopping search results in a grid view
-  Show shopping search results in a list view
-  Choose which item details to display on tiles in the grid view
-  Show  Hide Show or hide sidebar

Comparisons

-  or  Click to add an item to the Compare list
-  or  Item has been added to the Compare list
-  Click to generate a comparison
-  No items have been selected for comparison

Homepage

The screenshot shows the B2P Homepage interface. A red sidebar on the left contains navigation links: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Purchasing, Reporting, and Administer. The main content area is titled "B2P Homepage" and includes an "Organization Message" section with a welcome message and a link to the B2P blog. Below this is a "Shopping" section with "Simple" and "Advanced" search options. A "Go to" menu includes links for Favorites, Forms, Non-Catalog Item, and Quick Order. A "Browse" menu includes links for Suppliers, Categories, Contracts, and Chemicals. The "Action Items" section shows "My Assigned Approvals" with 4 items and "Orders" with 2 items. The "Forms, Policy, and Punchouts" section features a grid of buttons for PO (Non-Catalog), PR (Payment Request), NR (Non-Employee Reimbursement), ICQ (Independent Contractor), VJF (Required Using Fed Funds +\$50K), and CP (Contract Party Request). The "Laboratory Supplies" section lists various suppliers like VWR International, abcam, Airgas, Agilent, and BD.

Shopping panel has been resized and now extends fully across the homepage

Action Items section has moved down to accommodate

The Advanced search is now accessed in a new tab

Go to (previously 'Shortcuts') and Browse options remain unchanged

A new PO (non-Catalog) widget has been added.

This will open the same 'Add Non-Catalog Item' as with the existing links in the Shopping and Quick Links sections

Searching the Catalog

The search results can now be displayed in list view or grid view.

New List View

Simple | Advanced

test tubes

Hide

Search Results : 4000+

Compare items

Sort options

Toggle to see grid view

Show or hide filter sidebar

2 Compare



BEST MATCH

Item is a Favorite

Add item to Compare list

Click to add to Favorites

Click to remove item that is on Compare list

TEST TUBES,JUMBO,ST			
 W B MASON COMPANY INC	Part Number: LRNLER2788	Mfg. Name: STANLEY BLACK & DECKER INC	15.99 USD
	System Packaging: SET	Mfg. Part No.: LRNLER2788	<input type="text" value="1"/> Add To Cart
			COMPARE
 USA SCIENTIFIC INC	Part Number: 5611-5261	Mfg. Part No.: 115261	273.50 USD
	System Packaging: 5microL_CS		<input type="text" value="1"/> Add To Cart
			COMPARE

New Grid View

2 Compare



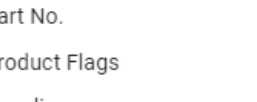
BEST MATCH

Toggle to see list view

Select item details to display on tiles in the grid view

- Mfg. Name
- Mfg. Part No.
- Part No.
- Product Flags
- Supplier
- Supplier Classes
- System Packaging

Apply **Cancel**

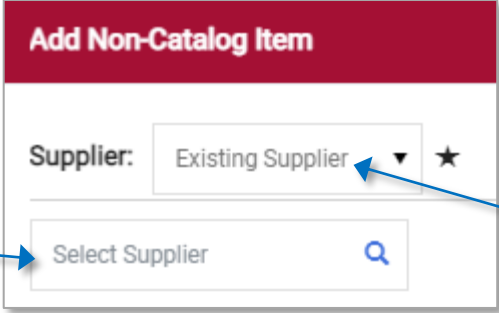
 TEST TUBES,JUMBO,ST from W B MASON COMPANY INC	 Test Tube, 12x75mm, 5 mL, Sterile, PPN, Round Bottom, Snap 12,0/75 MM, IND.PACKED from USA SCIENTIFIC INC	 Test Tube, 12x75mm, 5 mL, Sterile, PPN, Round Bottom, Snap 12,0/75 MM, IND.PACKED from USA SCIENTIFIC INC
Part Number: LRNLER2788	Part Number: 5611-5261	Part Number: 5611-5261
15.99 USD	273.50 USD	455.00 USD
<input type="text" value="1"/> Add To Cart	<input type="text" value="1"/> Add To Cart	<input type="text" value="1"/> Add To Cart

Non-Catalog Item

Step 1: Open the Add Non-Catalog Item window by clicking links in the **Shopping** and **Quick Links** sections or through the new **PO (Non-Catalog)** widget.

Step 2: Enter the supplier in the Select Supplier field or click the magnifying glass to open the Supplier Search window.

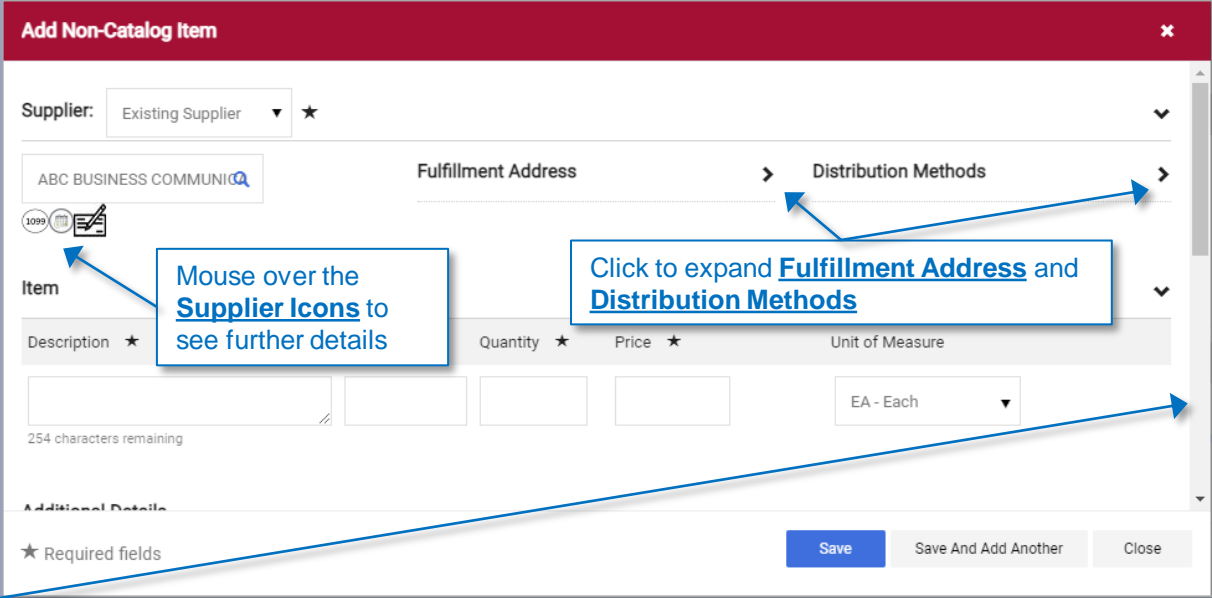
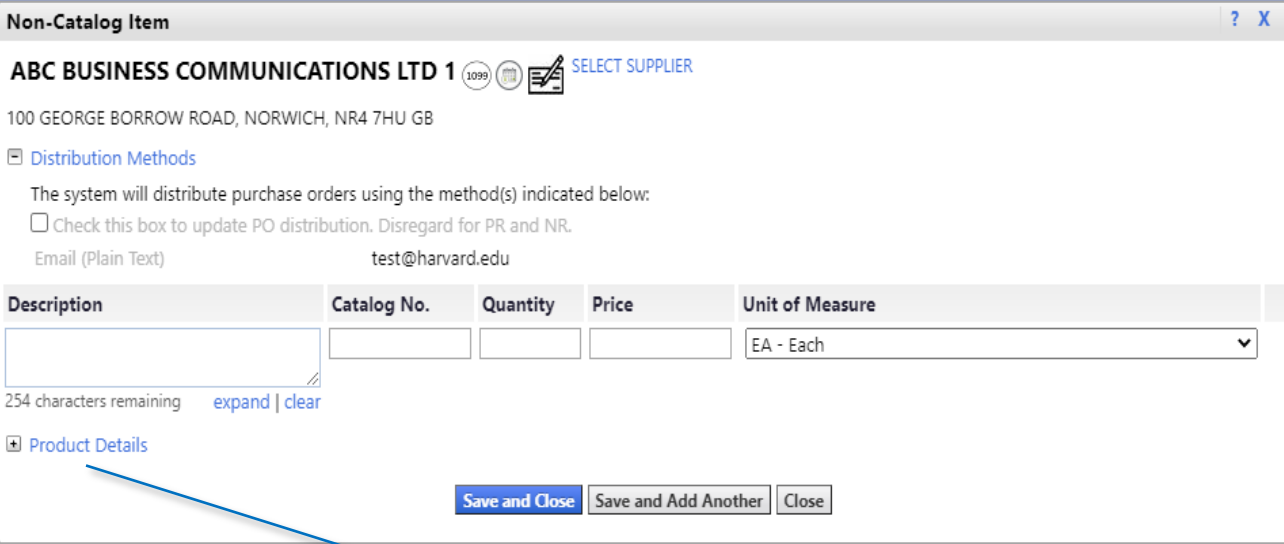
Step 3: Once you have selected a supplier, there are a few changes that are highlighted below.



Do not use the **Existing Supplier** field to search for a supplier

Original experience

New Shopping experience



Scroll down to see the **Additional Details** and **Add Internal Attachments** sections that were previously found under **Product Details**

Mouse over the **Supplier Icons** to see further details

Click to expand **Fulfillment Address** and **Distribution Methods**

Cart

Original experience

Shopping Cart for Shopper VM Return Cart 2 Item(s) for a total of 1,000.00 USD

Proceed to Checkout or Assign Cart

Add Non-Catalog Item Save

Cart Name: 2020-08-06 choppersum.01

Requisition Description or Business Purpose:

Standing Amount Based PO

Supplier / Line Item Details

Show details For selected line items Add to Favorites Go

HD Supply Facilities Maintenance [more info...](#)

Add non-catalog item for this supplier...

Product Description	Catalog No	Unit of Measure	Unit Price	Quantity	Ext. Price	
1 Sponsored Item more info...	12345	EA	500.00	2 EA	1,000.00 USD	<input type="checkbox"/>
Supplier subtotal					1,000.00 USD	
Subtotal					1,000.00	
Total					1,000.00 USD	

Save Proceed to Checkout or Assign Cart

New Shopping experience

Shopping Cart This is my cart name Edit cart name

Simple Advanced Simple and Advanced Search to continue shopping

Search for products, suppliers, forms, part number, etc. Search

2 Items

ABC BUSINESS COMMUNICATIONS LTD 1 · 2 Items · 100.00 USD

SUPPLIER DETAILS Item Catalog No. Unit Price Quantity Ext. Price

1	Gadget	12345	50.00	2 EA	100.00	<input type="checkbox"/>	Click to view items details
---	--------	-------	-------	------	--------	--------------------------	--

ITEM DETAILS Click to open actions menu for individual items

Estimate (100.00 USD) Total: 100.00

Proceed To Checkout Assign Cart

Click to open actions menu for supplier

Click to open actions menu once you have selected items (i.e. clicked the checkboxes)

Please note: The Requisition Description or Business Purpose field and the Standing Amount Based PO checkbox are no longer available on *the shopping cart*. Click 'Proceed to Checkout' to update those fields.

Jaggaer, the B2P vendor, is working to add them back in.

Checkout Process

Items previously in the left-hand menu are now found across the top in tabs

Subsections previously under Requisition (i.e. the items you viewed in the **Final Review** tab) are now located on the **Summary** tab. You can scroll through using the scroll-bar on the *far* right.

Click the eye icon to filter your view to line items only or accounting codes with line items

Scroll-bar to navigate through the **Summary** section

Click to edit section

Internal and External Attachments are located on one tab

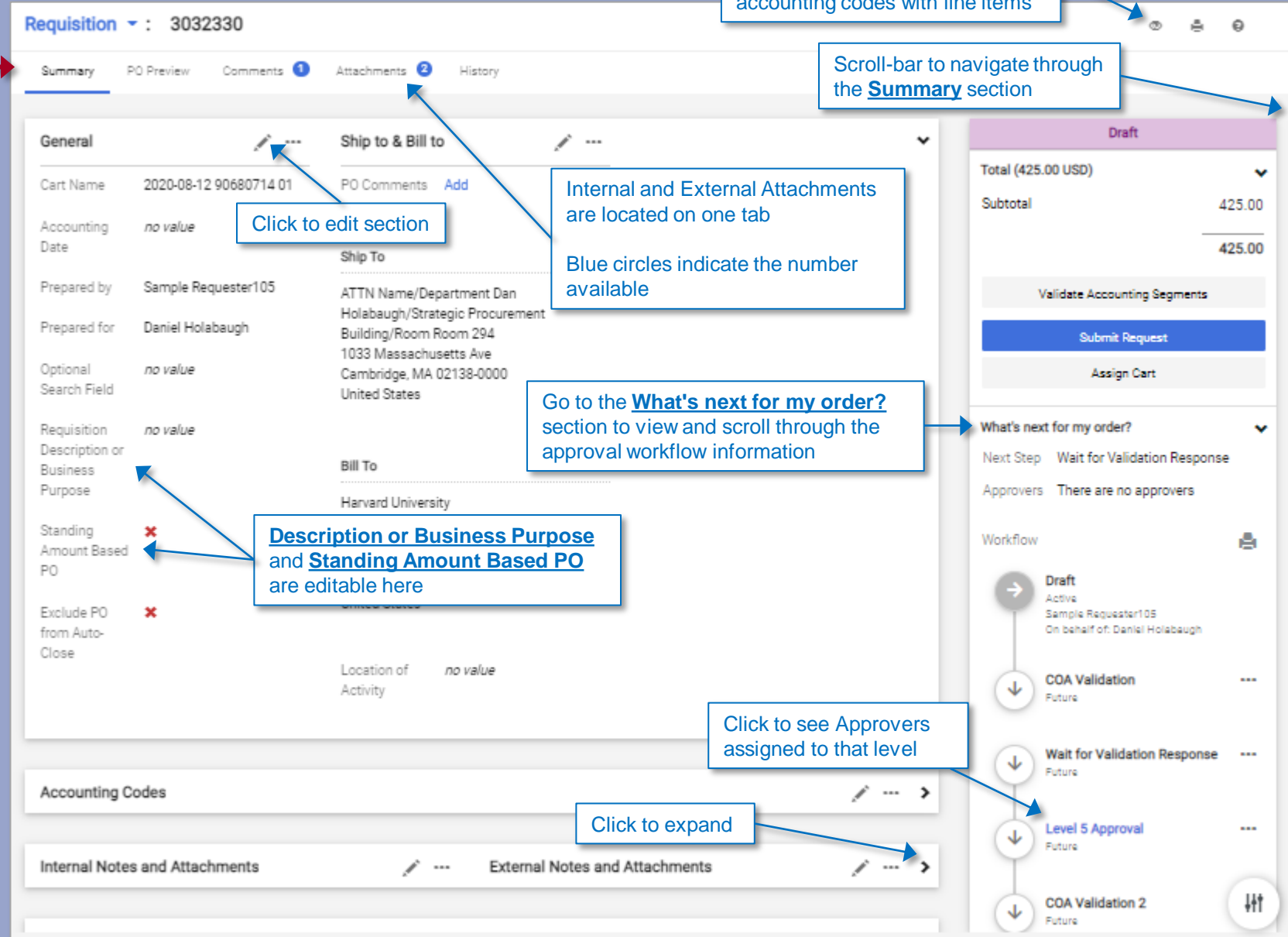
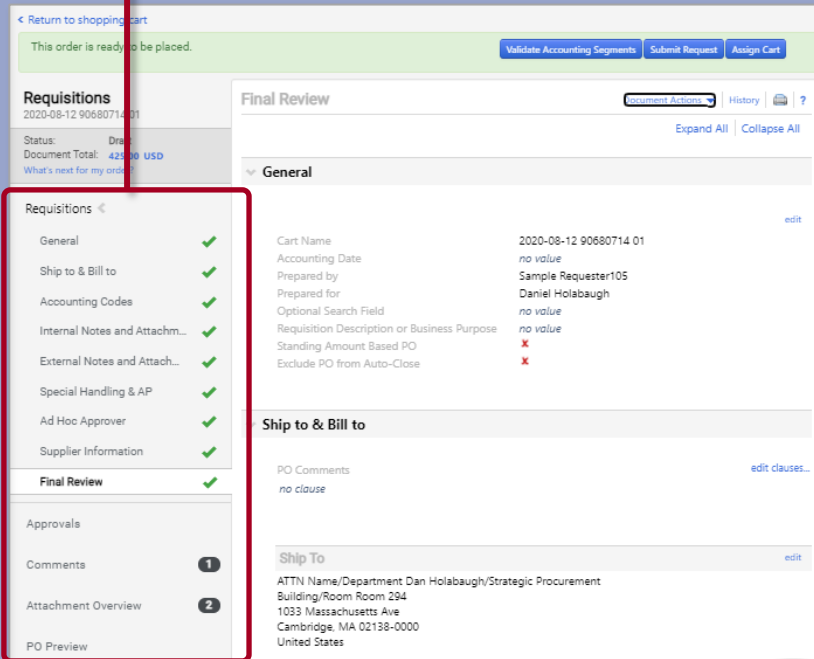
Blue circles indicate the number available

Go to the **What's next for my order?** section to view and scroll through the approval workflow information

Description or Business Purpose and **Standing Amount Based PO** are editable here

Click to see Approvers assigned to that level

Click to expand



Checkout Process: COA at Header Level

Step 1: Click the eye icon to filter the view of the Summary tab to show Accounting Codes and line items.

FILTER VIEW

- View All
- View Line Items Only
- View Accounting Codes Only



Step 2: Click pencil to open window to edit COA in header section

Tub	Org	Object	Fund	Activity	Root	
520 HMS*Harv Med School	45340 HMS*Health Care Policy	6600 Laboratory Supplies+Materials, GENERAL	225331 HMS*Kessler, King Faisal Specialis, NO AWARD NUMBER, Jan-18, Dec-19,	387735 HMS*A02, King Faisal Specialist , Analysis Coordiantion for the Saudi Arabia Natl ,	no value	65519 HMS*Kessler, Ronald 40465510



Edit Accounting Codes ✕

Accounting Codes

Tub	Org	Object	Fund	Activity
520	45340	6600	225331	387735

Click magnifying glass to search values

Click arrow to access COA segment favorites

Hover your mouse over the section to display the three options for [add split \(+\)](#), [recalculate / validate](#) (check), and [Code Favorites](#) (heart)

You may have to scroll to the right to see these

+
✓
♥

Save Changes
Close

Checkout Process: COA at Line Level

Step 1: Click the eye icon to filter the view of the Summary tab to show Accounting Codes and line items.

FILTER VIEW

- View All
- View Line Items Only
- View Accounting Codes Only



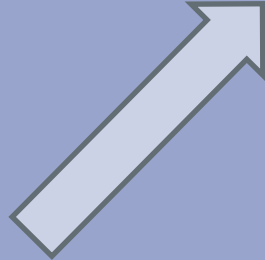
View with line level COA same as header COA

Tub	Org	Object	Fund	Activity	Subactivity-Activity	Root
520	45340	6600	225331	387735	no value	65519
HMS*Harv Med School	HMS*Health Care Policy	Laboratory Supplies+Materials GENERAL	HMS*Kessler, King Faisal Specialis, NO	HMS*A02, King Faisal Specialist, Analysis		HMS*Kessler, Ronald 40465510

Step 2: Click (...) at the line level and select **Accounting Codes** from the menu to edit line level COA details

Line level does not state 'Same as header' like in original view. If nothing is stated, then line level COA is the same as header COA

Mouse over 'i' icon to see information



Override Line 1: Accounting Codes

Tub: 520

Step 3: Search and enter COA values in the **Override Line** pop-up



View with line level COA different from header COA

Tub	Org	Object	Fund	Activity	Subactivity-Activity	Root
520	45340	6600	225331	387735	no value	65519
HMS*Harv Med School	HMS*Health Care Policy	Laboratory Supplies+Materials, GENERAL	HMS*Kessler, King Faisal Specialis, NO AWARD NUMBER, Jan-18, Dec-19,	HMS*A02, King Faisal Specialist, Analysis Coordination for the Saudi Arabia Natl.,		HMS*Kessler, Ronald 40465510

You will see **'Values vary by line. Copy to other lines'** in the Account Codes section when one of the line items is assigned to a different COA

Line items assigned to a different COA will display an **ACCOUNTING CODES** section

Tub	Org	Object	Fund	Activity	Subactivity-Activity	Root
520	45312	no value	362445	730001	0000-730001	66232
HMS*Harv Med School	HMS*Cell Biology		HMS*Proteome and Interactome Research Fund	HMS XT*(A1) Instr+Departmental Rech	730001*Unspecified	HMS*Harper, Jeffrey W 80268629 HMS*Pathology

Checkout Process: Action Menus

The menu options previously found under **Document Actions** are now found by clicking the document type name in the top-left

Return to Cart is also here

Requisition : 3032330

Comments 1 Attachments 2 History

Return to Cart
Copy to New Cart
Add Comment
Continue Shopping

Accounting Date
no value

Prepared by
Sample Requester105

Prepared for
Daniel Holabaugh

Ship to & Bill to

PO Comments
Add

Ship To

ATTN Name/Department
Dan Holabaugh/Strategic Procurement

Building/Room Room 294
1033 Massachusetts Ave
Cambridge, MA 02138-0000

Draft

Total (425.00 USD)

Subtotal 425.00

425.00

Validate Accounting Segments

Submit Request

Assign Cart

Submit Request button is located here

Note: it is only active on the Summary, Comments, and Attachments tabs. You will not be able to click if you are on the PO Preview or History tabs

8 Items

ABC BUSINESS COMMUNICATIONS LTD 1 - 3 Items - 300.00 USD

SUPPLIER DETAILS

Item	Catalog No.	Unit Price	Quantity	Ext. Price
1 Widgets	54321	100.00	3 EA	300.00

ITEM DETAILS

Contract: *no value* Internal Attachments Add

Taxable **x** External Note *no value*

Total (425.00 USD)

Subtotal 425.00

Add to Favorites
Remove Selected Items
Remove All Items
Move to Another Cart
Change Supplier
Add to Draft Cart or Pending Requisition/PO
Requires Sourcing
Remove Requires Sourcing

Step 1: Click a checkbox next to an item to select it. A green arrow will display

Step 2: Click the drop-down menu arrow in the section heading to see list of available actions that can be taken for the selected item(s)

Submitted Requisitions

Items previously in the left-hand menu are now found across the top in tabs and in sections within the **Summary** tab. You can scroll through using the scroll-bar on the far right.

Original experience

Requisitions: 3011619
Test 1 - Non-Catalog new UI

Status: **Completed**
Document Total: **100.00 USD**
[View Related Documents](#)

Requisitions <

Summary

- General
- Ship to & Bill to
- Accounting Codes
- Internal Notes and Attachm...
- External Notes and Attach...
- Special Handling & AP
- Ad Hoc Approver
- Supplier Information

Approvals

Comments

Attachment Overview

New Shopping experience

Requisition ▾ : 3011619

1 of 1 Results ▾

Summary | Comments | Attachments | History

General ... **Ship to & Bill to**

Status **✓ Completed**
(2/3/2021 3:47 PM)

Submitted 2/1/2021 11:01 AM

Cart Name Test 1 - Non-Catalog new UI

Accounting Date 2/1/2021

Prepared by Sample Requester105

Optional Search Field *no value*

Requisition Description or Business Purpose **Test**

Standing Amount Based **✓**
PO

PO Comments

Ship To

ATTN Name/Department
Chemistry
Building/Room
1033 Massachusetts Ave
Cambridge, MA 02138-0000
United States

Bill To

Harvard University
Accounts Payable
Email invoices to AP_Invoices@harvard.edu
P.O. Box 381588
Cambridge, MA 02238
United States

Completed

Total (100.00 USD) ▾

Subtotal 100.00

100.00

Related Documents ▾

[Purchase Order: 80000003161](#) 🖨️

What's next? ▾

Workflow 🖨️

- Submitted 2/1/2021 11:01 AM
Sample Requester105
- COA Validation Completed ...
- Wait for Validation Response Approved ...

Scroll-bar to navigate through the **Summary** section

Internal and External Attachments are located on one tab

Click to open related documents

Go to the **What's next?** section to view and scroll through the approval workflow information

POs

Items previously in the left-hand menu are now found across the top in tabs and in sections within the **Summary** tab. You can scroll through using the scroll-bar on the far right.

New Shopping experience

Original experience

Purchase Order:
8000002441 Revision 0
3076901

Supplier: ABC BUSINESS CO...
Status: Completed
Document Total: 100,000.00 USD
[View Related Documents](#)

Status

Purchase Order <

Summary

General

Ship to & Bill to

Accounting Codes

Distribution Information

Special Handling

Supplier Information

Revisions

PO Approvals

Shipments

Change Requests **1**

Receipts

Invoices **1**

Comments

Attachment Overview **1**

Purchase Order : 8000002441

14 of 20 Results

Status Summary Revisions **1** Shipments Change Requests **1** Receipts **1** Invoices **1** Comments Attachments **1**

General

Accounting Date 3/12/2020

PO/Reference No. 8000002441

Revision No. 0

Priority Normal

Supplier Name ABC BUSINESS COMMUNICATIONS LTD

Address 100 GEORGE BORROW ROAD
NORWICH, NR4 7HU GB

Purchase Order Date 3/12/2020

Total 100,000.00

Requisition Number [2918098](#) view | print

Requisition Description or Business Purpose *no value*

Standing Amount Based PO

Ship to & Bill to

PO Comments

Ship To

ATTN: Sample Requester101
Department
Building/Room
1033 Massachusetts Ave
Cambridge, MA 02138
United States

ShipTo Address Code H062

Bill To

Harvard University
Accounts Payable
P.O. Box 381588
Cambridge, MA 02238
United States

Completed

Total (100,000.00 USD)

Subtotal 100,000.00

100,000.00

Related Documents

[Requisitions: 2918098](#)

[Invoices: 00001373](#)

What's next?

Workflow

Submitted
3/12/2020 7:51 AM
Sample Requester101

Assign PO Number
Completed ...

Revise PO
Completed



Blue circles indicate the number available

Scroll-bar to navigate through the Summary section

Click to open related documents

Go to the What's next? section to view and scroll through the approval workflow information