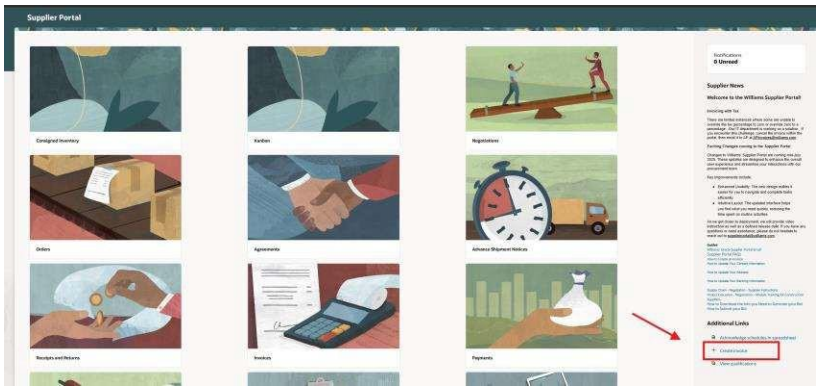
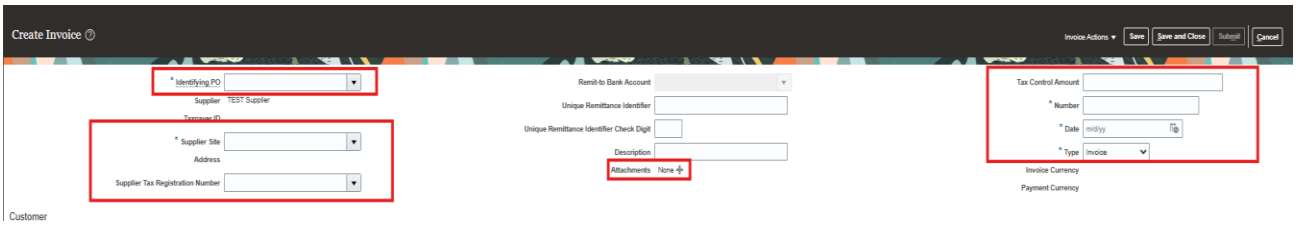
How to submit a new invoice through the Supplier Portal

On the Portal home page, scroll to the bottom and click on the Create Invoice hyperlink on the right.

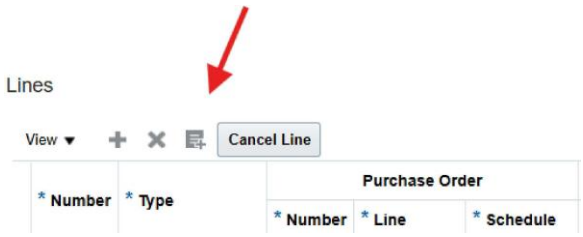


Required fields:

Identifying PO: The Williams Purchase Order #
Supplier Site: Your supplier site
Attachment: Copy of your company's invoice
Number: Your company's invoice number
Date: Invoice date
Purchase Order Lines: The Williams Purchase Order lines, quantity and price
Tax Control Amount: Enter your sales tax and the system will validate when submitting. This field must be populated.

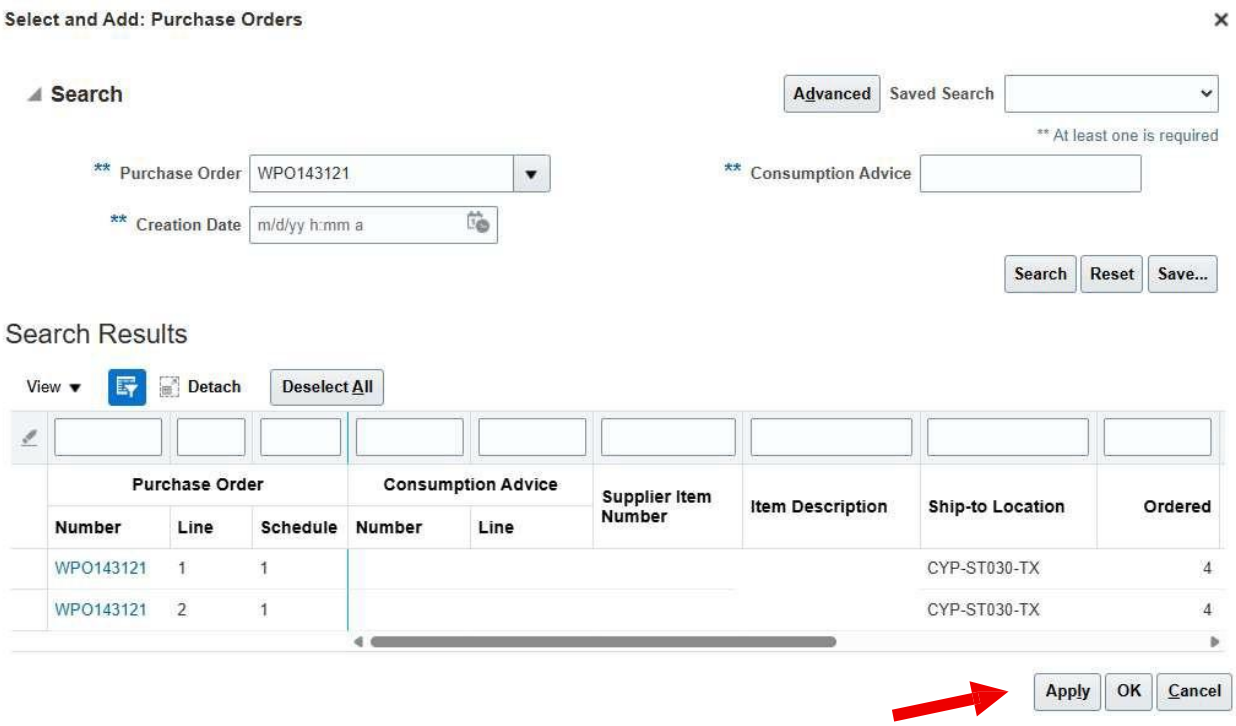


Lines: In the middle of the screen is where you will add your PO Lines. Click on the Select and Add button shown below. This will open a new box with all related PO lines.



Select all the lines that are going to be added to the invoice and click Apply. It will take you back to the main screen where you need to make updates to quantities.

DO NOT CLICK THE SUBMIT BUTTON

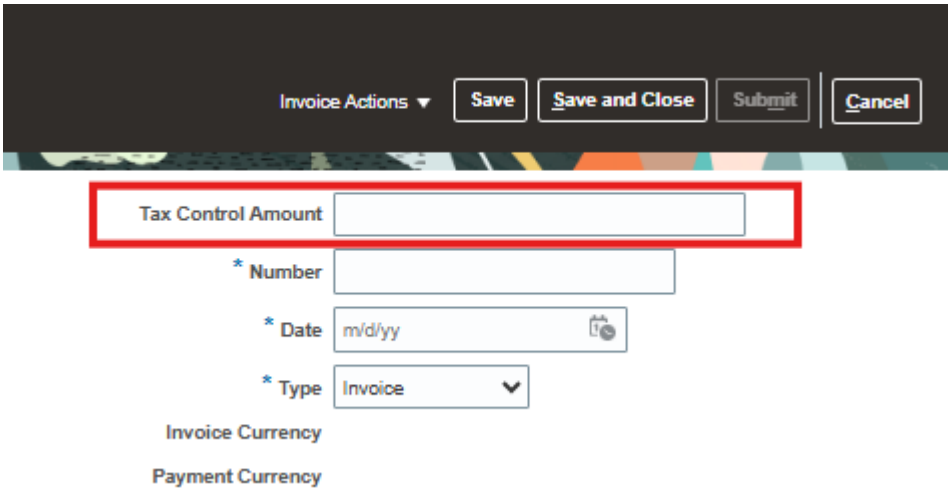


Freight or Misc Charge Lines: If there is freight or Misc Charges on your invoice, click on the + sign icon under the lines section.



Calculate Tax: in the upper right-hand side, enter your sales tax information in the “Tax Control Amount” field. **This step is required to submit your invoice.**

***If you are not charging sales tax, please enter a value of $0 before submitting.**



After clicking **Submit**, you may receive a **“Tax has been Calculated”** message. If so, click **Submit** again.

Please note, any use tax calculated by the system will **not** be included in the amount paid to the vendor.

Cancelling an Invoice

If the invoice has already been submitted, you will need to email our AP dept at WilliamsAP@us.ibm.com and request for it to be cancelled before resubmitting a new invoice. They will put an "A" at the end so you can resubmit with the same invoice number.

If you have not submitted the invoice, you can cancel the invoice by:

1. Updating the invoice number by adding an "A" at the end
2. Clicking on the Invoice Action dropdown and selecting Cancel Invoice

