Williams’ Supplier Portal

Version 2.0
AGENDA

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WHY DID WILLIAMS MAKE THIS CHANGE?
To promote fair and objective competition, while procuring high quality goods and services in a timely manner to meet the needs of Williams' Operations.

WHAT IS THE SUPPLIER PORTAL?
Williams is launching the Oracle Cloud Supplier Portal. The Cloud Supplier Portal is an opportunity for Williams to offer a streamlined procure-to-pay experience to its suppliers. This new system will impact how suppliers register with Williams, respond to Qualification Questionnaires and bid on Request for Quotes/Proposals.
General Information
- Go Live – July 6, 2021

Benefits to Suppliers
- Common process across Williams
- Participate in Sourcing Events
- Complete Qualification Questionnaires
- Update Supplier Information
- View POs
- View/Manage Contracts
- Request Change Orders
- Invoice Review
- Invoice Status
HOW ARE YOU IMPACTED?

- You are now required to be registered in the Cloud Portal System before you can submit any bids.
- There are now 2 supplier types – Prospective and Spend Authorized
- All bidding will be done electronically through the Portal
- Suppliers will have the ability to see their invoices in the Portal that have been submitted to APInvoices@Williams.com
Key Terms

- **Negotiation Event**
  - Replaces RFI/RFQ/RFP

- **Purchase Order (PO)**
  - Replaces Request for Services (RFS)
  - RFS will be an attachment to the PO header

- **Prospective Supplier**
  - Can participate in a negotiation events
  - Not PO award eligible
  - Must go through qualification process to move beyond Prospective

- **Spend Authorized Supplier**
  - Replaces qualified supplier
  - PO award eligible

- **Approved Supplier List (ASL)**
  - Replaces Preferred Supplier List (PSL)
  - Database will reside in Oracle Cloud
SUPPLIER ROLES/ DUTIES IN THE PORTAL

- **Supplier Self Service Administrator** – Manages the profile information for the Supplier company. Primary tasks include updating supplier profile information and manage user accounts/access control based on specific job functions. This role can assign all the below roles.
  - *This role is critical to the supplier’s portal maintenance.*

- **Supplier Bidder** – Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requests for information and reverse auctions.

- **Supplier Sales Representative** – Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to agreements in addition to adding catalog line items with customer.

- **Supplier Customer Service Representative** – Manages inbound purchase orders and communicates shipment activities for the supplier company. Primary tasks include tracking, acknowledging or requesting changes to new orders. Communicates order schedules that are ready to be shipped by submitting advance shipment notices and monitors the receipt activities performed by the buying organization.

- **Supplier Accounts Receivable Specialist** – Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.

- **Supplier Inventory Manager** – Individual in a supplier organization responsible for managing inventory process control from beginning to end. Monitors available supplies, materials and products in order to ensure that customers, employees and production have access to the materials they need.
GETTING STARTED

- Establish single e-mail for purchasing
- Review Opus training materials
- Upon Receipt of Portal Invitation via Email:
  - Update your profile
    - Assign Administrative Role within your company
    - Review/Add organization details
    - Add addresses
    - Add contacts
      - By Role (Ex: Contracts, Sales, AR, etc.)
      - Add business classifications (minority owned, etc.)
      - Add products and services
  - Participate in future online training sessions provided by Williams

NOTE: Do not make any changes to PEC score under Business Classifications. This is daily auto-feed functionality.
ORDERS (PURCHASE ORDERS)

Supplier can modify:

- Supplier Item number
- Quantity ordered
- Unit Price
- Promised Delivery Date
  - Quantity can be split into 2 shipments
- Change reason is required
**SCHEDULES**

**Supplier can:**
- Modify Promised delivery date
- Split order quantity to multiple schedules
- Acknowledge schedule via spreadsheet

**Note:** Yellow triangle displays past due orders
Williams Supplier Portal

AGREEMENTS (CPAs / BPAs)

Supplier can:
- Acknowledge the agreement
- Add supplier internal agreement number
- Modify the Supplier Item number
- Modify the unit price
- Expire an item
- Add a replacement item
- Change reason is required
SHIPMENTS
Supplier can:

- Create ASN (Advanced Shipment Notice)
- Create ASBN (Advanced Shipment Billing Notice)
- View Receipts/Returns
- Modify Shipments
CONTRACTS/DELIVERABLES

Supplier can:

- View existing contracts

Note: Williams will not utilize the external (supplier) deliverables functionality
INVOICES/PAYMENTS
Supplier can:

- View status of invoices
- View payment status of invoices
NEGOITIATIONS EVENTS

Supplier can:
- Acknowledge receipt of the negotiation
- Create a response to the negotiation
- Export a Response worksheet to respond using Excel
- Monitor the negotiation
- View the PDF of the negotiation
QUALIFICATIONS
Supplier can:
- View qualifications questionnaires
- Respond to questionnaires
FAQs

- **Can the supplier submit invoices without being in the Portal?** YES, Williams’ legacy process is still in place and the Supplier can utilize this process sending invoices to APInvoices@williams.com. *This is the preferred process.*

- **Can the supplier submit a quote to Williams outside of the Portal?** NO, Williams is driving all RFQ bids through the Portal.

- **Does the supplier need to register for the Portal if we are currently a supplier to Williams?** Yes, you will need to Register into the SUPPLIER PORTAL.

- **Is the supplier required to provide a single email for purchasing?** Williams requests that the supplier provide a general email address vs POs going to an individual. This will provide continuity in the event the individual leaves the company.

- **Can the supplier make changes to its profile without any issues?** Williams will review changes and provide approval to any changes made by the supplier.

- **Can the supplier make price changes to provided goods or services through the Portal?** Yes, but Williams will review changes and provide approval to any changes made by the supplier.

- **Can the supplier correct the PEC score under Business Classifications if it looks incorrect?** No, this is an auto-feed functionality coming straight from PEC. Please go into supplier PEC account to update any information necessary to correct PEC score. This will update in Williams Supplier Portal profile upon correction in PEC. The updates to feed are daily.
FAQs

- **Can the supplier correct the Veriforce compliance information under Business Classifications if it looks incorrect?** No, this is an auto-feed functionality coming straight from Veriforce. Please go into supplier Veriforce account to update any information necessary to correct information. This will update in Williams Supplier Portal profile upon correction in Veriforce. The updates to feed are daily.

- **How do the Qualification Responses impact the supplier?** Williams will use this information in a variety of ways, including reporting to management on Environmental, Social & Governance (ESG) initiatives, for technical consideration and for general review of the supplier.

- **Can the supplier edit its contracts in the Portal?** No, suppliers have access to view existing contract documents.

- **Are there any contract deliverables for the supplier to manage in the Portal?** No, Williams does not intend to utilize this functionality.
Williams Supplier Portal

CONTACT FOR QUESTIONS
- Your Contract Manager / Category Manager
- Supply Chain Support: supplychain@williams.com

RESOURCES
All documents listed below can be found under Supplier Portal on Williams Vendor website: https://www.williams.com/vendor-terms-conditions/
- Letter sent to Suppliers on June 2, 2021
- Supplier Portal Overview Presentation
- Opus Training Materials
- FAQs
- Log in to Supplier Portal: Sign In (oraclecloud.com)
OPUS TRAINING MATERIALS

- Combine micro-learnings from a set of inter-related topics into an interactive table of contents

- Opus Materials on topics covered today may be accessed under Supplier Portal here: https://www.williams.com/vendor-terms-conditions/