



## Steps to Create an Invoice in the Supplier Portal

### 1. Update Header Information:

**\*\*Very important – To be paid via ACH, select your ACH option under the Supplier Site**

The Supplier site will begin with an 'A' for ACH or "W" for Wire:

If you wish to setup ACH with Williams, please send your ACH information, as well as contact information, on your letterhead to [supplierportal@williams.com](mailto:supplierportal@williams.com). We will follow up with that contact to confirm your ACH information.

**2. Select the Lines:**

Invoice Actions: Save, Save and Close, Submit, Cancel

Search Results

Available Quantity	Quantity	Unit Price	UOM
1	1	4760	EACH
15	15	30.4	EACH

Search Results Table:

Number	Line	Schedule	Number	Line	Supplier Item Number	Item Description	Ship-to Location	Order
WPO132133	1	1				DETECTOR, TYPE	EFD-SAOFF-TX	
WPO132133	2	1				CATALYST, ELEME...	EFD-SAOFF-TX	

**DO NOT CLICK SUBMIT AFTER COMPLETING THIS STEP – Steps 4 and 5 related to tax, must be completed/verified, even if you are not billing taxes.**

**3. Enter the Freight Line if applicable. (If there is not any freight included on your invoice, skip to Step 4.)**

Press the plus sign icon under the Lines section to add lines to the invoice:

Lines

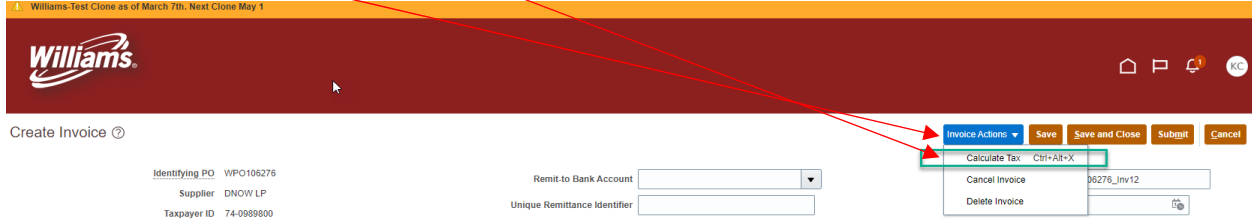
View: +, Cancel Line

Number	Type	Ship-to Location	Ship-from Location	Tax Classification	Amount	Description
No data to display.						
Total						

An additional line should appear in the Lines section of the window. Choose the Type of "Freight" and enter the Amount & click "Save". The invoice lines will automatically re-sort into ascending order and the freight will be prorated against all the lines on the PO.

**DO NOT CLICK SUBMIT AFTER COMPLETING THIS STEP – Steps 4 and 5 related to tax, must be completed/verified, even if you are not billing taxes.**

4. **Sales Tax.** After updating the header information, selecting the lines, and adding freight, click “Invoice Actions” and then “Calculate tax”:



The system will calculate tax for the transaction and return a tax line. The tax amount returned is based on rules that exist in Williams’ tax solution. If zero tax is calculated and your invoice includes tax, **the system may prevent you from updating your tax rate and tax amount.** Please forward a copy of your PO to [Tax-Transaction@williams.com](mailto:Tax-Transaction@williams.com) to request an exemption.

The calculated tax and tax rate will appear under the “Summary Tax Lines” section:

Summary Tax Lines

Line	Regime	Tax Name	Tax Jurisdiction	Tax Status	Rate Name	Percentage	Per Unit	Amount
1	VERTEX COMMON...	VERTEX TAX	VTX_VERTEX_...	Standard	STD	8.517		851.7

If these amounts do not equal the corresponding amounts on the invoice, update the Percentage to equal tax rate as shown on invoice (if there is not any sales tax on the invoice, please update rate to 0). The Amount will automatically calculate based on the new tax rate entered. Under “Invoice Actions”, click “Calculate Tax”, then Click “Save”. The System will override the tax rate back to original tax rate shown (this is OK), but the Amount should still be correct.

**PLEASE NOTE, if there is not any sales tax on your invoice, the system may accrue use tax. We will further discuss this in Step 5.**

At the bottom of the screen, in the Totals Section, the Items, Freight, Exclusive Tax, Invoice Amount, and Due should equal the amounts as shown on the invoice.

Totals

Items	10,000.00	Freight	0.00	Miscellaneous	0.00	Inclusive Tax	0.00	Exclusive Tax	1,000.00	Invoice Amount	11,000.00
								Retainage	0.00	Due	11,000.00

**Before clicking “Submit”, confirm the Totals at the bottom of the screen are equal to your invoice.**

*(PLEASE NOTE: We have legal entities that qualify for sales and use tax exemptions in multiple states. If our system calculated \$0 tax due, and your invoice includes sales tax, the system may prevent you from updating the tax lines. Please click “Save and Close” and forward a copy of your PO to [Tax-Transaction@williams.com](mailto:Tax-Transaction@williams.com).)*

5. **Use Tax.** Williams is responsible for accruing and remitting Use Tax when our suppliers do not charge us Sales Tax. **These taxes will NOT be added to the invoice total to be paid to our suppliers. The taxes will be paid directly to the appropriate taxing authority by Williams.** Please see the below Use Tax accrual example:

Summary Tax Lines

View ▾

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	* Rate Name	Percentage	Per Unit	Amount
1	VERTEX COMMON...	VERTEX TAX	VTX_VERTEX_...	Standard	STD	0		0
2	VERTEX US TAX	CITY	TULSA	Standard	STD	3.65		365
3	VERTEX US TAX	COUNTY	TULSA	Standard	STD	0.367		36.7
4	VERTEX US TAX	STATE	OKLAHOMA	Standard	STD	4.5		450

Totals

Items	Freight	Miscellaneous	Inclusive Tax	Exclusive Tax	Invoice Amount
10,000.00	0.00	0.00	0.00	0.00	10,000.00
				Retainage	Due
				0.00	10,000.00

Use Tax lines can be easily identified by looking at the Tax Name and Tax Jurisdiction fields. The “Tax Name” will not be “Vertex Tax” and the “Tax Jurisdiction” will not be “VTX\_VERTEX\_TAX\_”.

**Please, do not change these lines.**

At the bottom of the screen, in the Totals Section, the Items, Freight, Invoice Amount, and Due should equal the amounts as shown on the invoice. The Use Tax accrued will not be included in the Totals Section:

Totals

Items	Freight	Miscellaneous	Inclusive Tax	Exclusive Tax	Invoice Amount
10,000.00	0.00	0.00	0.00	0.00	10,000.00
				Retainage	Due
				0.00	10,000.00

**Before clicking “Submit”, confirm the Totals at the bottom of the screen are equal to your invoice.**