



Halliburton iPortal Submission – North America

Accounts Payable E-Invoicing Team

Updated 2022



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Registration Process

Registration Steps

How to get register?

- In order to start the activation process, your company must first be invited by Halliburton. The invitation email contains the activation code and is sent to the email address that we have on file for your company. You can change the email address to be used to access the account during the activation process.
- **Registration Steps**
 - **Step 1: Email Registration**
Submit an email to iPortal@Halliburton.com to get the registration email.
 - **Step 2: Active Account**
Click on  in the email received from Taulia.
 - **Step 3: Log In**
When the activation process is completed, you will receive a Login email which will contain the link to join the Taulia Portal.

For further support on registration, please see Taulia Support Link
[Taulia Support - Q. How do I activate my Taulia account?: 000008658](#)

2

It's time to activate your account

Great news! *Taulia PD2 800 has sponsored your participation in their online supplier platform, powered by Taulia. This gives you 24/7 visibility into invoice status, payments, and past transaction history and more!

There is no charge to use this platform. All you need to do is activate your account!

[Activate my account →](#)

If the button doesn't work, copy and paste <https://activate.staging.taulia.com/start?token=hn92fykAyC> directly to your web browser. Treat this link and activation code securely - it is used to gain immediate access to your account.

Activation Code: hn92fykAyC
Supplier Number: SYLVAIN11

If you are not the correct person to receive this invitation, please forward this email to the right contact in your company. For additional information about Taulia, click [here](#).

3

Welcome to the *Taulia PD2 800 platform, powered by Taulia!

G, you are now an important part of the *Taulia PD2 800 supplier platform! It is now easier than ever to transact with *Taulia PD2 800, your customer through the Taulia Platform.

Your username is: gerard.urbano+7@taulia.com

[Log me in →](#)



Are you new to Taulia? Click [here](#) to learn more about what you should do first as a new user.

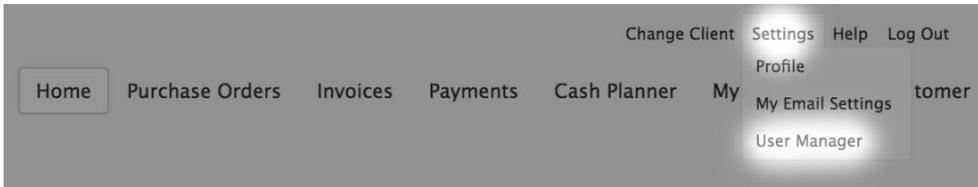


Registration Process

Merge Accounts

Account merging allows you to access multiple accounts in Taulia using a single email account. Your company may have multiple supplier entities for a single customer OR multiple supplier entities for different customers on Taulia.

1 - Go to Settings > User Manager.

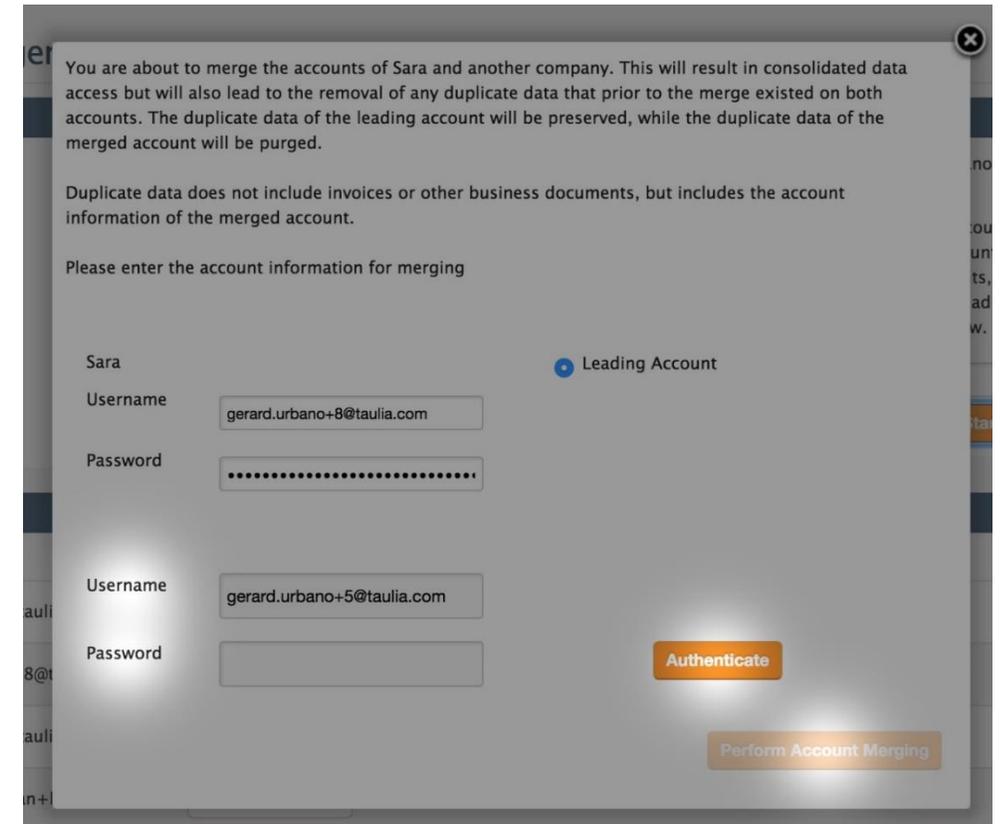


2 - Enter the email address of an admin user from the other account you want to merge with.



If you have issues on how to complete the Merge of Accounts please contact iPortal@Halliburton.com or open a ticket to Taulia Team - [Taulia Support - Home](#)

3 - Click on “Perform Account Merging”

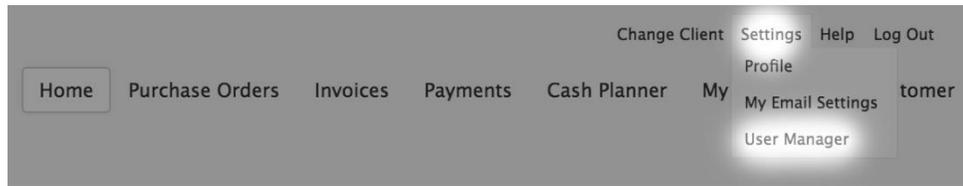


Registration Process

Account Management

Users are an essential part of your Taulia account. Providing Taulia access to the right set of individuals in your company will help streamline access to information between you and our account. **As an admin you will be able to activate or deactivate a user from your account.**

1 - Go to Settings > User Manager.



2 - Complete the fields required to register the account and then click on "Create User"

User	Role	Status	Actions
gerard.urbano+8@taulia.co...	Admin	Enabled	
gerard.urbano+test8@tauli...	Billing	Enabled	
kalin.ivanov+test@taulia...	Admin	Enabled	
saranya.ravichandran+hdr@...	Admin	Enabled	
saranya.ravichandran+rdon...	Read-Only	Enabled	

Ability	Admin	Finance	Billing	Read-Only
View My POs	✓	✓	✓	✓
Confirm/Dispute POs	✓	✓	✓	✗
View Shipments (ASN)	✓	✓	✓	✓
Create Shipments (ASN)	✓	✓	✓	✗
View My Invoices	✓	✓	✓	✓
Create Invoices	✓	✓	✓	✗
View My Payments	✓	✓	✓	✓
View Customer Relationships	✓	✓	✓	✓
View Messages	✓	✓	✓	✓
Search Documents	✓	✓	✓	✓
Manage Email Settings	✓	✓	✓	✓
Manage Compliance Settings	✓	✓	✓	✗
View/Manage Address	✓	✓	View Only	View Only
View/Manage Bank Accounts	✓	✓	✗	✗
View/Manage Tax Identifiers	✓	✓	✗	✗
Merge Accounts	✓	✗	✗	✗
Create/Manage User Accounts	✓	✗	✗	✗
Change User Roles	✓	✗	✗	✗
Request Early Payment	✓	✓	✗	✗
Enable Cashflow™	✓	✓	✗	✗
Use Cash Planner	✓	✓	✗	✗

If your account is deactivated please contact iPortal@Halliburton.com or open a ticket to Taulia Team - [Taulia Support - Home](#)





Halliburton Basic Details

We will go through basics details related to your invoices.

Basic Details

Halliburton Buying Channels

Buying Channel	Invoicing Option	Description	Document Series	Example
Material Purchase Orders	Create Invoice > Purchase Orders	Invoices related to Materials, tools, Chemicals and others. Non Related to Services.	10 Digits 45 – Material PO 83 – ARIBA PO	4512345678 8312345678
Service Entries Purchase Order	Create Invoice > Purchase Orders	Invoices related to Services requested which could be Onsite or Offsite.	10 Digits 42 – Offsite PO 43 – Onsite PO 83 – ARIBA PO	4212345678 4312345678 8312345678
My Request (Pre-Authorization)	Create Invoice > Non PO Invoices	Services or Products that are processed via My Request Tool Note: Only 1 Invoice per 1 Request Permitted.	10 Digits 82 – My Request	8212345678
Non- Purchase Order Financial Invoice (FI)	Create Invoice > Non PO Invoices	Invoices that are submitted without any Buying Channel. Only restricted for certain accounts. Please make sure to confirm with your requestor.	N/A	Plant ID: 0201 Work Order: 315389310



Basic Details

Portal Invoice Status

HALLIBURTON Settings Log Out

Home Purchase Orders **Invoices** Payments My Details Custom FAQs

My Invoices

Search My Invoices [Advanced Search](#)

Invoice Number

Purchase Order

Invoice Status **Unpaid**

Branch

Showing 1-10 of 1,461 Unpaid invoices

[Download List](#) [Refresh](#)

Invoice #	Inv.	Due Date	Document Amount	Status	Payment	Actions
28068931CM	Jan	Feb 17, 2022	\$3,465.79	Approved		
28068931A	Jan	Feb 17, 2022	\$3,465.78	Approved		
28068927CM	Jan	Feb 17, 2022	\$3,492.63	Approved		
28068927A	Jan 3, 2022	4515709082	Feb 17, 2022	\$3,492.57	Approved	
28068897CM	Jan 3, 2022	4515709082	Feb 17, 2022	\$3,515.19	Approved	
28068897A	Jan 3, 2022	4515709082	Feb 17, 2022	\$3,515.13	Approved	
28068891CM	Jan 3, 2022	4515709082	Feb 17, 2022	\$3,517.99	Approved	
28068891A	Jan 3, 2022	4515709082	Feb 17, 2022	\$3,517.95	Approved	
28068886CM	Jan 3, 2022	4515709082	Feb 17, 2022	\$3,539.09	Approved	
28068886A	Jan 3, 2022	4515709082	Feb 17, 2022	\$3,539.10	Approved	

1 2 3 4 5 6 7 8 9 10 ... 147 | Next | Total items: 1461

Halliburton Portal Invoice Status

- **Approved:** The invoice has already completed all the approval and Review stages and is ready for Payment. Payment should get released based on “Portal Due Date.”
- **In Process:** Invoice that is still pending approval or action by Halliburton. If you need Support to get these invoices posted, please use the option “Actions > Send Message.”
- **Incomplete:** Invoice having an error to submit because there is a Plant, Work Order, or FI Auth Number Missing. Please validate the error message to complete the submission process.
- **Paid:** Invoice that is already paid and clear From our statement. If you have any questions regarding the Payment, please use “Payments > Select the Payment Doc. > Send Message”.
- **Rejected/Void:** An invoice that Halliburton does not accept. If you do not have the rejection message, please use Actions > Send Message. Our Accounts Payable Team Will provide you with details in 24 hours.
- **Pending Review:** Invoice submitted via E-Send that will require a Review by the Supplier. Please make the corrections and re-submit the invoice.



Invoice Submission

Material Purchase Orders: Requirements



Before you get started to submit your PO invoice through the Taulia Portal, please take note of the following:

- Not all countries or entities will allow invoicing against a purchase order through the portal. If you don't have PO invoicing capabilities in Taulia, contact us via FGBSEINVOICING@Halliburton.com
- Halliburton may have customized fields in the invoice creation screen that are not explained in this article. Use the "?" next to the field for additional information.
- You can only reference one PO per invoice.
- You cannot invoice zero value line items. [Freight](#) can be added as an Additional Item but cannot be the sole content of the invoice.
- Visit the **Custom FAQ** page in your portal account to see additional information about creating an invoice.



Purchase Orders

My Purchase Orders

The iPortal powered by Taulia is connected to Halliburton's procurement system. Purchase orders (PO's) are immediately available in Taulia as soon as they are issued by Halliburton.

PO's typically arrive with a **New** status. You will be able to see a historical list of other purchase orders in the portal as configured.

If you are not able to find a particular PO that you are expecting to be available, please contact FGBSEINVOICING@Halliburton.com.

Quick Access Links



My POs
Search Purchase Orders



Create Invoice
Last invoice
PIKG0061743
Jan 5, 2022



My Invoices
Search invoices



My Payments
Search Payments

Recent Messages

Find the most recent messages that you exchanged with your customer below:

From	Subject	Date
Halliburto...	Accounts Payabl...	Jan 11, 2021 6:11 AM
Multi-Chem...	Accounts Payabl...	Jan 11, 2021 6:11 AM
Halliburto...	Accounts Payabl...	Jan 11, 2021 5:06 AM
Halliburto...	Request For the...	Oct 15, 2020 2:21 AM
Hall Energ...	E-Invoicing Sub...	Aug 21, 2020 6:57 PM
Halliburto...	Halliburton - M...	Apr 2, 2020 1:01 PM
Halliburto...	Halliburton - M...	Sep 30, 2021 7:47 AM

Latest Purchase Orders

The following purchase orders have been received:

PO Number	PO Value	Date	Status
4516084448	\$7,500.00	Jan 5, 2022	New
4516084437	\$233.76	Jan 5, 2022	New
4516081568	\$5,472.18	Jan 4, 2022	New
4516081501	\$31.20	Jan 4, 2022	New
8300113436	\$2,247.88	Dec 31, 2021	Invoiced
4516078322	\$940.56	Dec 31, 2021	New

1 - Log into the **Home** page of the portal.

2 - Click on **My POs** in the **Quick Access Link** section. You can also select **Purchase Orders** from the top menu.

3 - Search for your PO by **PO number** or search by **PO Status**.

My Purchase Orders

Search My Purchase Orders Advanced Search

PO Number

PO Status

Find Purchase Order

From the search results, you will see the following PO information:

- **PO Number:** PO number created by Haliburton.
- **Status:** The current status of your purchase order. Click Status to learn more about each PO status.
- **Date:** The date the PO was created.
- **PO Value:** The total value of the PO.
- **Invoiced Value:** The total value that has been invoiced against the PO.
- **Open Value:** Remaining value (if any) available for invoicing.



Purchase Orders

My Purchase Orders: Search Options

All purchase orders are created by Halliburton and transmitted to Taulia through Halliburton's procurement system. Taulia delivers the PO details to you through the platform for review or invoicing purposes.

You can further narrow down your search by [PO status](#):

- New
- Unconfirmed
- Delivered
- Invoiced
- Open
- Closed
- Self Billing

“My purchase order is missing. Who should I contact?”

- Review that you have access to the correct Vendor ID Account.
- Review that all Business Units are available.

If you are still not able to view the PO's please contact FGBSEINVOICING@Halliburton.com for support.

My Purchase Orders

Search My Purchase Orders [Advanced Search](#)

PO Number

PO Status

Branch

[Find Purchase Order](#)

Purchase Orders 1-10 [Download List](#) [Refresh](#)

PO Number	Status	Date	PO Value	Invoiced Value	Open Value	Actions
4516084437	New	Jan 5, 2022	\$233.76	\$0.00	\$233.76	
4516084448	New	Jan 5, 2022	\$7,500.00	\$0.00	\$7,500.00	
4516081568	New	Jan 4, 2022	\$5,472.18	\$0.00	\$5,472.18	
4516081501	New	Jan 4, 2022	\$31.20	\$0.00	\$31.20	



Invoice Submission

Material Purchase Orders: Requirements

Before you get started to submit your PO invoice through the Taulia Portal, please take note of the following:

- Not all countries or entities will allow invoicing against a purchase order through the portal. If you don't have PO invoicing capabilities in Taulia, contact us via FGBSEINVOICING@Halliburton.com
- Halliburton may have customized fields in the invoice creation screen that are not explained in this article. Use the "?" next to the field for additional information.
- You can only reference one PO per invoice.
- You cannot invoice zero value line items. [Freight](#) can be added as an Additional Item but cannot be the sole content of the invoice.
- Visit the **Custom FAQ** page in your portal account to see additional information about creating an invoice.



Invoice Submission

Material Purchase Orders: Create Invoices

Easily submit your PO based invoices through the Taulia platform. Because Taulia is connected to Halliburton's accounting system, invoices submitted through Taulia are received in real-time. With Taulia, invoice submission is fast and easy.

Create Invoice

Search Purchase Orders to Create an Invoice [Advanced Search](#)

PO Number

PO Status

[+ Create Non-PO Invoice](#) [Find Purchase Order](#)

PO Number	Status	Date	PO Value	Invoiced Value	Open Value	Actions
9001659714	Invoiced	Feb 25, 2015	\$63,000.00	\$63,000.00	\$0.00	+ Create Invoice
9001659671	New	Feb 25, 2015	\$5,000.00	\$0.00	\$5,000.00	+ Create Invoice
9001623011	Invoiced	Nov 3, 2014	\$20,000.00	\$20,000.00	\$0.00	+ Create Invoice
9001550075	Invoiced	Apr 23, 2014	\$70,000.00	\$63,000.00	\$7,000.00	+ Create Invoice
9001543460	Invoiced	Apr 4, 2014	\$100,000.00	\$80,000.00	\$20,000.00	+ Create Invoice
9001456981	Invoiced	Sep 6, 2013	\$100,000.00	\$99,435.89	\$564.11	+ Create Invoice

1 - Click on **Create Invoice** from the home page.

2 - [Search for the PO](#) that you need to create an invoice against using the search feature. Select the PO number.

3 - After selecting the Purchase Order number, you will be shown the PO details. You can:

Select **Confirm PO** (if present) to confirm the PO - [click here to learn about PO Confirmation](#).

4 - According to PO selected, click on "Create Invoice" in the right side of the PO listed.



Invoice Submission

Material Purchase Orders: Line Item Details

Review the line-item details of your invoice.

Note that you cannot invoice PO line items with zero value.

1. Select "X" remove the line item.
2. You can also use the "X" option to remove line items you do not need to invoice or wish to invoice at a later date.
3. Line items match

Line-Items

- **Description** (automatically pulled from the PO)
- **Unit** (automatically pulled from the PO)
- **Quantity** (edit the Quantity that you are invoicing if needed)
- **Unit Price** (if not editable, you will invoice the line amount using the Quantity field)
- **Ext Service No.** (Not Mandatory)

Note: Taulia System will validate and provide you a Tolerance Limit of 10% review if we modify the Line price.

X	#	PO Item	Description	Unit	Quantity	Unit Price
	1	10-10	FULL AMOUNT	JOB (Job)	1	2,000.00
					Discount	0.00
					Line Total	2,000.00

The PO-invoice price change to set by your customer is violated

Line Items

Select All De-Select All Remove Selected Reset

X	#	PO Item	Description	Unit	Quantity	Unit Price
	1	1	2A37213 KIT/PARTS/3 RLF VA/EXL	Ea (Each)	0	2,028.62
					Discount	0.00
					Line Total	0.00
Ext Service No. ?						
<input type="text"/>						
X	#	PO Item	Description	Unit	Quantity	Unit Price
	2	2	2P39528 SPDR/3 RLF VA/SHL DTY	Ea (Each)	1	326.98
					Discount	0.00
					Line Total	326.98
Ext Service No. ?						
<input type="text"/>						



Invoice Submission

Material Purchase Orders: Submit Invoice

In the final stage, please make sure to attach your invoice original PDF copy as a mandatory requirement for Canada. **Please make sure that taxes and details are added as per invoice copy.**

- Add any **Additional Items**, such as freight charges, etc. (if applicable).
 - You cannot create an invoice with only freight as an additional item. If you need freight as a PO item, contact your buyer.
 - In the case the Surcharge or Additional Items are not available please use OTHERS
- Enter the **Comments** (if required).
- Click **Upload Attachment** to upload a copy of your own itemized invoice **(Mandatory)**.
- Add **Taxes** (Mandatory). Please make sure that the lines are matching as per original invoice copy.

Click **Submit Invoice**. Then, you will need to confirm your invoice submission.

Additional Items			
#	Description	Amount	Type
<input type="button" value="+ Add"/>	<input type="text" value="Select One..."/>	<input type="text" value="Freight"/>	
<input type="text" value="Comment"/>			
<input type="button" value="Upload Attachment"/>			

Subtotal	1,024.21		
Total Discount	0.00		
GST	<input type="text" value="\$0.00"/>		
HST	<input type="text" value="\$0.00"/>		
QST	<input type="text" value="\$0.00"/>		
PST	<input type="text" value="\$0.00"/>		
Invoice Amount	1,024.21		
Currency	CAD (Canadian Dollar)		



Invoice Submission Purchase Orders: Services

In this section, we will explain the process on how to submit the Services Invoices (PO)

Invoice Submission

Service Purchase Orders: Requirements



Before you get started to submit your Services PO invoice through the Taulia Portal, please take note of the following:

- Not all countries or entities will allow invoicing against a purchase order through the portal. If you don't have PO invoicing capabilities in Taulia, contact us via FGBSEINVOICING@Halliburton.com
- Halliburton may have customized fields in the invoice creation screen that are not explained in this article. Use the "?" next to the field for additional information.
- You can only reference one Service PO per invoice.
- You cannot invoice zero value line items. [Freight](#) can be added as an Additional Item but cannot be the sole content of the invoice.
- Visit the **Custom FAQ** page in your portal account to see additional information about creating an invoice.



Invoice Submission

Service Purchase Orders: Create Invoice



Easily submit your PO based invoices through the Taulia platform. Because Taulia is connected to Halliburton's accounting system, invoices submitted through Taulia are received in real-time. With Taulia, invoice submission is fast and easy.

HALLIBURTON Home Purchase Orders **Invoices** * Payments My Details Custom FAQs Change Client Settings Log Out

Create Invoice

Search Purchase Orders to Create an Invoice [Advanced Search](#)

PO Number: ?

PO Status: ?

[+ Create Non-PO Invoice](#)

[Find Purchase Order](#)

Purchase Orders 1-1 [Download](#) [Refresh](#)

PO Number	Status	Date	PO Value	Invoiced Value	Open Value	Actions
4302144289	New	Dec 20, 2021	\$4,386.93	\$0.00	\$4,386.93	* + Create Invoice

1 - Click on **Create Invoice** from the home page.

2 - Search for the PO that you need to create an invoice against using the search feature. Select the Service PO number.

3 - After selecting the Purchase Order number, you will be shown the PO details. You can:

Select **Confirm PO** (if present) to confirm the PO - [click here to learn about PO Confirmation](#).

4 - According to PO selected, click on "Create Invoice" in the right side of the PO listed.

5- If looking for an specific PO number please use the option to filter by an specific PO ID.



Invoice Submission

Service Purchase Orders: Line Item Details

Review the line-item details of your invoice.

Note that you cannot invoice PO line items with zero value.

1. Select "X" remove the line item.
2. You can also use the "X" option to remove line items you do not need to invoice or wish to invoice at a later date.
3. Line items match

Line-Items

- **Description** (automatically pulled from the PO)
- **Unit** (automatically pulled from the PO)
- **Quantity** (edit the Quantity that you are invoicing if needed)
- **Unit Price** (if not editable, you will invoice the line amount using the Quantity field)
- **Ext Service No.** (If you receive the Service Entry Number- Example 1001234567)

Note: Taulia System will validate and provide you a Tolerance Limit of 10% review if we modify the Line price.

X	#	PO Item	Description	Unit	Quantity	Unit Price
	1	10-10	FULL AMOUNT	JOB (job)	1	2,000.00
					Discount	0.00
					Line Total	2,000.00

The PO-invoice price change to set by your customer is violated

Line Items						
Select All De-Select All Remove Selected Reset						
X	#	PO Item	Description	Unit	Quantity	Unit Price
	1	10-10		JOB (job)	0	4,386.93
					Discount	0.00
					Line Total	0.00
Ext Service No.						
X	#	PO Item	Description	Unit	Quantity	Unit Price
	2	11		Ea (Each)	0	0.00
					Discount	0.00
					Line Total	0.00
Ext Service No.						
Add line						



Invoice Submission Non-PO Invoices

In this section, we will explain the process on how to submit the Non-PO Invoices

Invoice Submission

Non-Purchase Order Invoices: Requirements

Before you get started, please take note of the following:

- Not all accounts are allowed non-po invoicing through the portal. Please contact your requestor or business contact to confirm your buying channel before using this option.
- Non-PO invoices will be INCOMPLETE if you do not provide us a Sales Order, Work Order, Plant, or FI Auth Number, covered in the next section.
- [Freight](#) can be added as an Additional Item but cannot be the sole content of the invoice.
- Visit the **Custom FAQ** page in your portal account to see additional information about creating an invoice

Create Invoice

Search Purchase Orders to Create an Invoice [Advanced Search](#)

PO Number	<input type="text"/>	+	+ Create Non-PO Invoice
PO Status	<input type="text" value="All Available"/>	?	Find Purchase Order



Invoice Submission

Non-Purchase Order Invoices: Customer Selection

Selecting your Supplier and Customer Account:

- If your company and customer has multiple branch / locations, you may be asked to select from the fields as presented below
- Select the correct Supplier based on the remit to address of your invoice. You may also select the customer location you invoiced from the Customer option. Select Create Non-PO Invoice to continue.
- If your account does not have the Customer or Supplier ID that is required contact FGBSEINVOICING@Halliburton.com

The screenshot shows the Halliburton web portal interface for submitting a Non-Purchase Order (NPO) invoice. The top navigation bar includes the Halliburton logo, a navigation menu with 'Home', 'Purchase Orders', 'Invoices', 'Payments', 'My Details', and 'Custom FAQs', and user options for 'Change Client', 'Settings', and 'Log Out'. The main content area is titled 'Submit Non-PO Invoice' and features a 'Hide From/To Selection' option. Below this, there are two dropdown menus for 'Supplier' and 'Customer'. The 'Customer' dropdown is currently open, showing a list of options: Halliburton Enrgy Svc Inc (HOUSTON), HM&LC (HOUSTON), Hall Energy Services, Inc (Dhahran), Halliburton Worlwide Ltd (Muscat), Multi-Chem Group, LLC (SAN ANGELO), Hall Energy Services, Inc (Hydra, Algiers), and PT Hal Drill Systems Ind (Tangerang Selatan). A 'Create Non-PO Invoice' button is located to the right of the dropdowns. A 'Need Help?' button is visible on the left side of the form. At the bottom, there are links for 'Terms and Conditions' and 'Privacy Policy', and a 'powered by taulia' logo.

Invoice Submission

Non-Purchase Order Invoices: Header Fields Information

Header Fields

1. **Invoice Number** (Mandatory): Need to Match with Original Invoice copy
2. **Invoice Date** (Mandatory): Need to Match with Original Invoice copy
3. **Supply Date** (Optional)
4. **Currency** (Mandatory): Need to Match with Original Invoice copy
5. **Reference Number** (Optional)
6. **Payment Terms** (As per SAP Contract Details)
7. **FI Auth Number** (ONLY if you have one). Please contact Requestor to provide you [82XX Series PO](#).
8. **Label** – (ONLY if you don't have FI Auth). Please use any of these options provided by your requestor.
9. **Label Number** – (ONLY if you don't have FI Auth). Please refer to page 8 for [Label Examples](#).

Submit Invoice to Halliburton Group Canada

Invoice Number	<input type="text"/>	Supplier	SPM FLOW CONTROL LTD	Customer	Halliburton Group Canada
Invoice Date	<input type="text"/>		8801 - 99 ST		1800, 645 - 7 Avenue SW
Supply Date	<input type="text"/>		CLAIRMONT, AB T0H 0W0		Calgary, AB T2P 4G8
Currency	CAD (Canadian Dolla)		CA (Canada)		CA (Canada)
Reference Number	<input type="text"/>		780-567-3857		(403) 231-9300
Payment Terms	Net due 90 days from receipt of invoice		780-567-2808		(403) 231-9369
FI Auth Number	<input type="text"/>			Customer Tax Identifier	<input type="text"/>
Outline Agremnt	<input type="text"/>		Change Ship From Address		Change Ship To Address
Label	Please select		Remit to		
Label Number	<input type="text"/>		SPM FLOW CONTROL LTD		
			8801 - 99 ST		
			CLAIRMONT, AB T0H 0W0		
			CA (Canada)		
			Phone		780-567
			-3857		
			Fax		780-567
			-2808		
			Edit Cancel		

Please select

- Sales Order
- Work Order Number
- Plant
- RR

Note: If this information is added incorrectly, you will receive an INCOMPLETE message explained on the next page.



Invoice Submission

Non-Purchase Order Invoices: Incomplete



If your invoices are marked as INCOMPLETE, you are missing information or adding wrong details in the Non-PO Header Fields.

Please make sure to add the right details about:

- **FI Auth Number** (ONLY if you have one). Please contact Requestor to provide you with an 82xx Series Number as shown in page 8.
- **Label** – (ONLY if you do not have FI Auth). Please use any of this options provided by your requestor.
- **Label Number** – (ONLY if you do not have FI Auth). Please refer to page 8 for Label Examples.

If you still have issues and cannot correct the Invoice marked as INCOMPLETE, please follow the steps in CUSTOM FAQ Taulia Portal or contact FGBSEINVOICING@Halliburton.com for support.

Invoice Detailed Status

Detailed Status

Invoice information created on the portal may differ from that on your customer's accounting system.

Customer

Halliburton Energy Services,
Inc.
3000 N Sam Houston Pkwy E
HOUSTON, TX 77032
US (United States)

Show Address Details ▾

Status	- <i>Incomplete</i>
Detailed Status	FI Auth, or Label/Value is required
Due Date	
Gross Amount	\$23,500.00
Delivery Costs	\$0.00
Payment Terms	Net due 60 days from receipt of invoice

Taxes

Invoice

Invoice Number	M10-0365748
Invoice Date	05-Jan-2022
Payment Terms	Net due 60 days from receipt of invoice
Type	Invoice
Create Date	05-Jan-2022
Label	Work Order Number



Invoice Submission

Non-Purchase Order Invoices: Line-Items Details



This section is related to how to enter the Line Items description for a Non-PO Invoice. In this part, you will be available to add Description, Unit Price, Quantity, and Price as per invoice copy. You can also “+Add Line” if you have multiple lime items.

Line-Item Details

- **Description** (mandatory)
- **Unit** (mandatory)
- **Quantity** (mandatory)
- **Unit Price** (mandatory)
- **Ext Service No.** (Not Mandatory)

The screenshot shows a web interface for entering line items. It features a table with columns for '#', 'Description', 'Unit', 'Quantity', and 'Unit Price'. The first row contains the value '1' in the '#' column, 'TEST' in the 'Description' column, 'Ea (Each)' in the 'Unit' column, '1' in the 'Quantity' column, and '100.00' in the 'Unit Price' column. Below the table, there are fields for 'Discount' (0.00) and 'Line Total' (100.00). At the bottom, there is an 'Ext Service No.' field and an '+ Add line' button.

#	Description	Unit	Quantity	Unit Price
1	TEST	Ea (Each)	1	100.00

Discount: 0.00
Line Total: 100.00

Ext Service No. ?

+ Add line

Note: IF you need to add more LINES, please use the option available as + Add Line.



Invoice Submission

Non-Purchase Order Invoices: Submit Invoice



In the final stage, please make sure to attach your invoice original PDF copy as a mandatory requirement for Canada. Please make sure that taxes and details are added as per invoice copy.

- Add any **Additional Items**, such as freight charges, etc. (if applicable).
 - You cannot create an invoice with only freight as an additional item. If you need freight as a PO item, contact your buyer.
 - In the case the Surcharge or Additional Items are not available please use OTHERS
- Enter the **Comments** (if required).
- Click **Upload Attachment** to upload a copy of your own itemized invoice (**Mandatory**).
- Add **Taxes** (Mandatory). Please make sure that the lines are matching as per original invoice copy.

Additional Items

#	Description	Amount	Type	Total
+ Add	Select One... <input type="button" value="v"/>	Freight <input type="button" value="v"/>		
		Select One...		
		Demurrage		
		Detention Fee		
		Energy Surcharge		
		Equipment Use Fee		
		Withholding Tax		
		Others		
		VAT TAX(not a sales tax for US)		
		Expedite Fee		
		Fuel Surcharge		
		Freight		
		Federal Oil Spill Tax		
		Federal Road Tax		
		Environmental Fee		
		Handling Charge		
		Federal Lust Tax		
		Federal Excise Tax		
		GST TAX(not a sales tax for US)		
		Pallett Charge		
		Blending Charge		

Subtotal		1,024.21	?
Total Discount		0.00	
GST	<input type="text" value="\$0.00"/>		
HST	<input type="text" value="\$0.00"/>		
QST	<input type="text" value="\$0.00"/>		
PST	<input type="text" value="\$0.00"/>		
Invoice Amount		1,024.21	?
Currency	CAD (Canadian Dollar)		?

Comment [?](#)

[Upload Attachment](#) [?](#)

[Save as Draft](#)

[Submit Invoice](#) *

Click **Submit Invoice**. Then, you will need to confirm your invoice submission.





Credit Notes

Invoice Submission

Credit Notes: Requirements



A credit note (also known as credit memo) is issued to indicate a return of funds in the event of an invoice error, incorrect or damaged products, purchase cancellation, or other circumstances that require a credit to be issued. A credit note can be created to apply a credit for a previous PO or Non-PO invoice.

Before creating a credit note, please take note of the following:

- Confirm with your Requestor or Local Point of contact if the credit should be related to a Purchase Order or Non-PO Credit Note.
- Once you submit your credit note and it is in process, the PO value will automatically update. If the credit note is rejected, it will remove the value back out of the PO.
- You will not be able to create a credit note against a PO that is closed. If you are not able to find a PO in the portal, make sure you are entering the correct PO number. If you are not able to find it, the PO may be closed. Please contact your buyer.



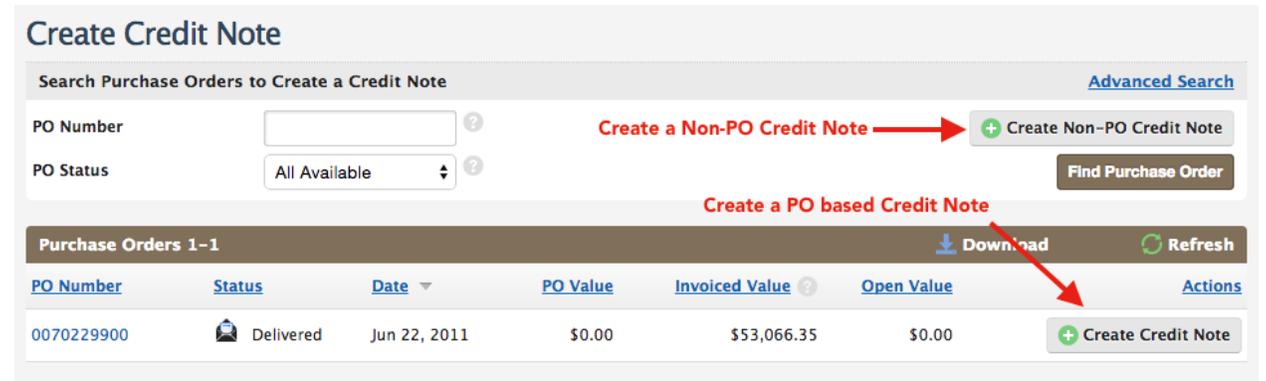
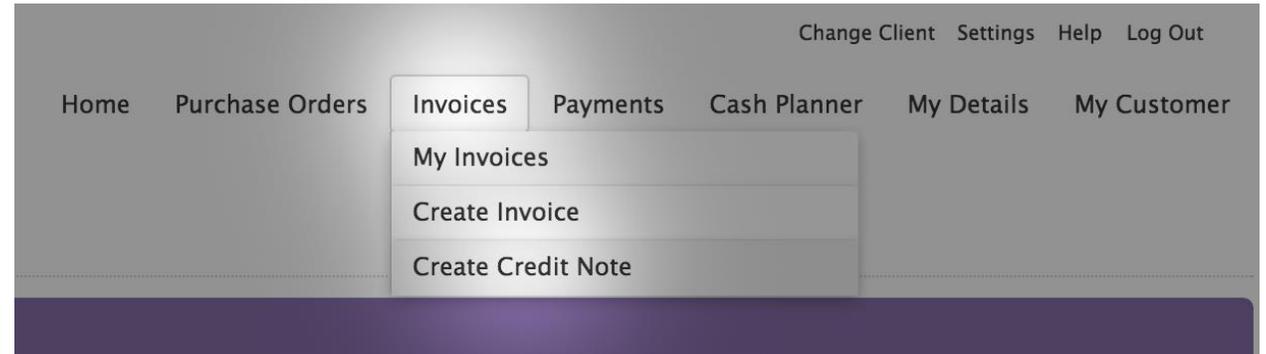
Invoice Submission

Credit Notes: Submission



- 1 - Log onto the **Home** page of the portal.
- 2 - Go to **Invoices > Create Credit Note**. (tab on top of page)
- 3 - Select the Type of Credit Note that you need to submit:
 - **PO Create Credit Note** (for PO related invoices)
 - **Create Non-PO Credit Note** (for non-PO related invoices)
- 4 - Include **Credit Note Number***, **Original Invoice Number**, **Orig. Invoice Date** and **Reason for Credit**.
- 5 - Enter **Quantity** and/or **Unit Price** in the **Line Items** section that you are crediting back.
- 6 - Remove lines that are not being credited. (Click "X" to the left of the line item)
- 7 - Add **Comments**, **Upload Attachment**, and **Tax**. (if applicable)
- 8 - Click **Submit Credit Note**.
- 9 - Check the status of your credit note under **My Invoices**.

For additional concerns, please contact FGBSEINVOICING@Halliburton.com



E-Send Submission

Get enrolled into Taulia e-Send functionality

eSend is a Taulia functionality that allows suppliers to submit invoices to Halliburton by emailing a PDF invoice to a specified email address.

To confirm your eligibility to submit invoices via eSend, you will need to work directly with FGBSEINVOICING@Halliburton.com (e-Invoicing Group). Once your eligibility has been confirmed and Halliburton approves your request to submit invoices through eSend, you will relate to a Taulia integration manager to get started.

The following requirements apply to all suppliers who are interested in joining the eSend program:

- 1** - You must be able to submit the raw PDF output of an invoice from your accounting system. Scanned or copied PDF documents will **not** be processed.
- 2** - Your invoice must be mapped by Taulia. This requires mapping and testing of your invoice data.
- 3** - The email address used to submit invoices must be registered as a user account in Taulia.
- 4- E-SEND** is not applicable for Purchase Orders that are related to [Service Entries](#) (PO Example – 42 & 43 Series)

E-Send Submission

Go Live and Email configuration

It is required one week of production testing. Halliburton e-Invoicing Team will monitor and confirm that the account is set up correctly. FGBSEINVOICING Team will submit an email with the instructions and guidelines required for this new option.

HALLIBURTON

TO:

FROM: Global E-Invoicing Implementation Team

SUBJECT: Welcome Halliburton E-Invoicing Integration 2021

We wanted to welcome you to our interface with Taulia E-Send Technology. You can initiate the submission of your invoices using the email option.

What is the email id?

Your new email ID is - halliburtoninvoices@inboxbytaulia.com. Please make sure always to submit one invoice copy only and always the **PDF Original attachment**. In case you need to add more support documentation is OK; the first attachment still needs to be the original invoice copy.

How can I send the invoice to the new email ID?

The new email ID is restricted to only users that are registered into the Portal. If a new user submits the invoice to your unique email ID, you will need to follow the [next instructions](#) to add/delete to your account. This option will help us avoid any fraudulent emails. Contact us on your behalf and route the invoice directly to your Halliburton Account.

Compliance Details – iPortal

In case you are doing business outside of the US, you will need to check if your compliance details are in order. It is vital to add any relevant information and provide a check with the bank account that will need to be used for your payment.



GO LIVE set up requirements

- Halliburton Accounts Payable representative will submit a Welcome Email and attaching these instructions.
- Only suppliers that submit more than 10 Invoices per Month, PDF Original Invoice and approved by our Procurement Team will be available to enroll to this option.
- After 1 week of testing any further issues should be reviewed by FGBSEinvoicing@Halliburton.com



HALLIBURTON

E-Send Submission

Email Format



NOTE

GO Live Week, please copy Halliburton Representative in order for us to track if all invoices are successfully submitted.



PDF Copy needs to be original or readable PDF copy. "If invoice is not scanned correctly, such as wrong angle" and email will be submitted by no-reply@supplier.taulia.com

STATEMENTS OF ACCOUNT

Statement of Accounts, Delivery Note, and other notifications will not be accepted via this channel. In case you need to submit your statement of Account to Halliburton, please use VendorRecovery@halliburton.com



HALLIBURTON

E-Send Submission

Taulia Email Notification

Invoice will be Review by Portal Team on average 10-15 minutes, and email confirmation will be submitted to the register email in the portal.

HALLIBURTON

INVOICE SUCCESSFULLY

Your invoice 70117705 was successfully submitted!

Your invoice 70117705 was successfully submitted to Halliburton. You can view it on Taulia using the link below.

Show me the invoice

 It's very easy to manage invoices in Taulia. Click [here](#) to learn how to search for invoices.

powered by | 

HALLIBURTON

INVOICE REJECTED

Invoice 70116366 needs corrections

You recently submitted invoice 70116366 for payment to . Unfortunately, issues were discovered with your invoice and it cannot be submitted until these are corrected. Click below to correct your invoice.

Fix my invoice

 You can review why your invoice was rejected on the Taulia platform. To review invoice information, follow [this step-by-step guide](#).

powered by | 

Taulia Inc.
795 Folsom Street 1007
San Francisco, CA 94107, US



HALLIBURTON

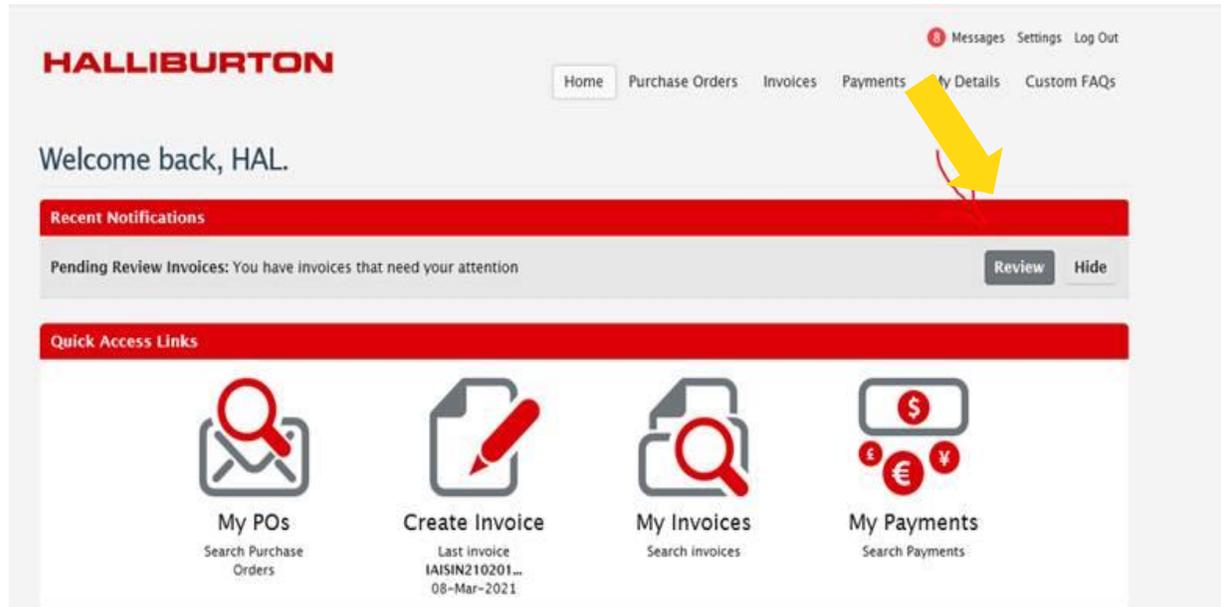
INVOICE NEED CORRECTIONS

In this section, we will explain the process when an invoice is rejected or need corrections with the Taulia iPortal

INVOICE NEEDS CORRECTIONS

eSend – Pending Review Stage

Invoices in which Taulia eSend finds a correction, an email confirmation will be submitted and you will also be available to go the Portal and select the invoices in Pending Review Stage



The screenshot shows the Halliburton Taulia Portal interface. At the top, there is a navigation bar with the Halliburton logo on the left and links for Home, Purchase Orders, Invoices, Payments, My Details, and Custom FAQs on the right. A yellow arrow points to the 'Payments' link. Below the navigation bar, there is a welcome message 'Welcome back, HAL.' and a 'Recent Notifications' section. A red notification bar states 'Pending Review Invoices: You have invoices that need your attention' with 'Review' and 'Hide' buttons. Below this is a 'Quick Access Links' section with four icons: 'My POs' (Search Purchase Orders), 'Create Invoice' (Last invoice IAISIN210201... 08-Mar-2021), 'My Invoices' (Search invoices), and 'My Payments' (Search Payments).

NOTE

Pending Review happens when your Invoice is not possible to COMPLETE the submission process because remit to address is missing, VAT, or duplicate Invoice submission.

Important Facts

- Log In the Taulia Portal and Review invoices that are in Pending Review Stage
- If any Support is required, please contact FGBSEinvoicing@Halliburton.com



INVOICE NEEDS CORRECTIONS

eSend – Pending Review Invoice Selection

My Invoices will provide all the documents that are pending for your review.

My Invoices

Search My Invoices [Advanced Search](#)

Invoice Number

Purchase Order

Invoice Status Pending Review

Pending Review Invoices 1-2 [Download List](#) [Refresh](#)

Invoice #	Inv. Date	PO #	Due Date	Document Amount	Status	Payment	Actions
IAESIN210201358	26-Feb-2021	tbd		SGD60.95	Pending Review		
IAESIN201000973	26-Oct-2020	tbd		SGD107.00	Pending Review		

ACTIONS

Click on ACTIONS and the option of COMPLETE / DELETE if required

- 1 - Log onto the **Home** page of the portal.
- 2 - Go to **Invoices > Pending Review** . (tab on top of page)
- 3 – Select the Invoice > Actions > Complete
- 4 – Complete the Corrections Required
- 5 – In the case you need to delete the invoice because of duplication, please return and follow the same steps > **DELETE**

You submitted this invoice through Taulia eSend. View the original invoice here. [View Invoice](#)

Submit Non-PO Invoice to Halliburton Far East Pte

An invoice with the same invoice number IAESIN210201358 was already submitted. Please choose a different invoice number.

Invoice Number Supplier Customer Halliburton Far East Pte Ltd
315 Jalan Ahmad Ibrahim
Singapore, SG 639940

Invoice Date



HALLIBURTON

WRONG INVOICE SUBMISSION/ RESTRICTIONS

HOW TO SEND YOUR INVOICES WITH FI E FORM

WRONG INVOICE SUBMISSION

eSend Email Rejections

Taulia eSend will provide you notifications with the email No-Reply@Supplier.Taulia.Com which will copy FGBSEINVOICING Team to provide you assistance if required.

Thu 4/15/2021 6:23 PM
no-reply@supplier.taulia.com
[EXTERNAL] Document Not Processed - Image Document

3.2021.04.15.02.19.16.379.x.pdf.pdf

External Sender: Use caution with links/attachments.

Dear Supplier,

We received a document that cannot be processed by the system. Only PDF or any text based documents can be processed. Image or scanned documents (e.g. image PDF, PNG, JPEG etc.) cannot be processed. Check your document and try again.

Regards,
The Taulia Team

Thu 4/15/2021 2:57 AM
no-reply@supplier.taulia.com
[EXTERNAL] Document Not Processed - Zero Value Line

taulia (inv 1).92573800.2021.04.14.21.51.21.036.x.pdf.pdf
60 KB

External Sender: Use caution with links/attachments.

Dear FMC Technologies Surface Integrated Services, Inc,

We received a document that contains zero line values. Please note that your customer does not support zero line values via Taulia. Therefore, please review, correct and resubmit your file.

Regards,
The Taulia Team

Thu 4/15/2021 5:24 AM
no-reply@supplier.taulia.com
[EXTERNAL] Document Not Processed - Statement/Correspondence

To

taulia (inv 1).invoice21210003612333840577.2021.04.11.23.03.18.721.x.pdf.pdf
484 KB

External Sender: Use caution with links/attachments.

Dear SOUTHERN TIRE MART,

We received a document that cannot be processed by the system. The document type received is unsupported by the system. Only submit data PDFs. Do not submit scanned or image document file types.

Regards,
The Taulia Team

- If you receive any of these notifications please complete the corrections requested or re-submit the invoice correctly.
- FGBSEINVOICING@Halliburton.com will be auctioning and providing support on the cases in which there is a new layout, scanned documents, calculation issues.
- Do not submit the invoice using another route if you receive any of these notifications. If you have any questions please contact FGBS Invoicing Team.



Other Taulia Options

Bank Changes

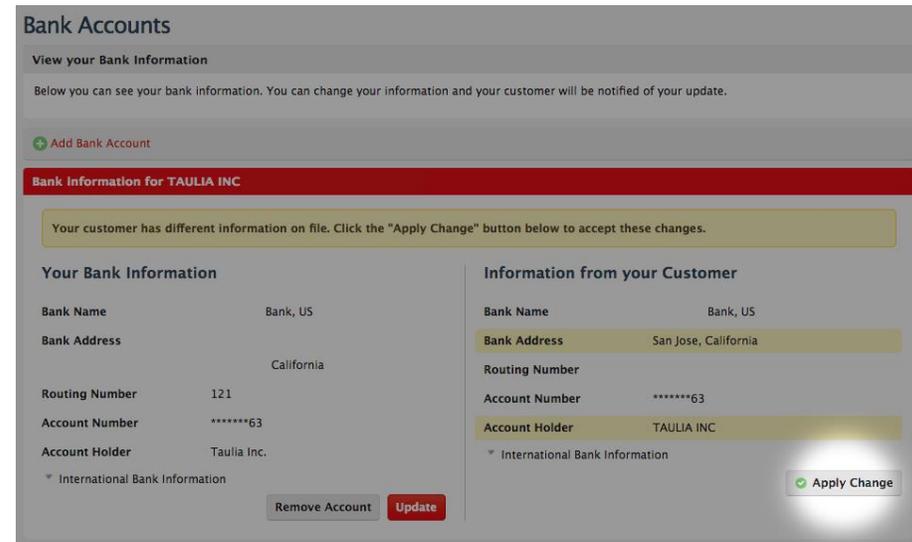
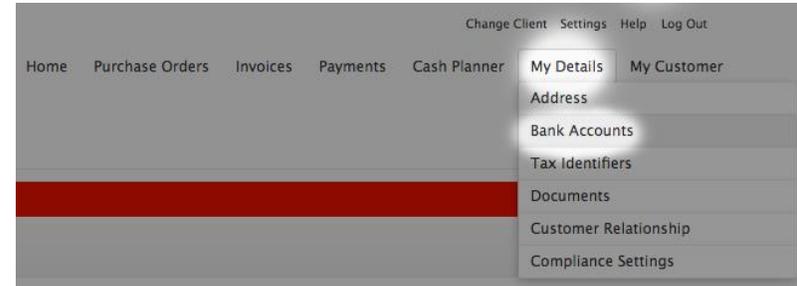
How do I add or update my bank account/information?

Taulia makes it easy to view and manage your company's banking information from Halliburton accounting system. Updates made through the platform are sent to our system for review and approval. Taulia does not change/manage your banking information. The platform only relays information available in Halliburton accounting system.

1 - Log onto the **Home** page of the portal.

2 - Go to **My Details > Bank Accounts**.

Important: If you see [Apply Change](#), this means Halliburton updated or has different bank information in their accounting system that they are asking you to accept. You will need to select [Apply Change](#) to show the updated data in the platform. If the information applied is incorrect, just select Update to correct the information. This update will then be sent back to Halliburton which will allow us to have the correct bank information in their system.



Other Taulia Options

Bank Changes

How do I add or update my bank account/information?

Taulia makes it easy to view and manage your company's banking information from Halliburton accounting system. Updates made through the platform are sent to our system for review and approval. Taulia does not change/manage your banking information. The platform only relays information available in Halliburton accounting system.

Add Bank Account

Bank country* ?

Routing Number* ?

Account Number* ?

Bank Currency* ?

Account Holder

International Bank Information

*These fields may be required for certain European countries and bank account types.

Swift/BIC Number ?

IBAN Number ?

[Next: Verify bank data](#) [Cancel](#)

[Privacy Policy](#)

Bank Accounts

View your Bank Information

Below you can see your bank information. You can change your information and your customer will be notified of your update.

[+ Add Bank Account](#)

Bank Information for TAULIA INC

Bank Name	BANK, US
Bank Address	California
Routing Number	1211
Account Number	*****63
Bank Branch Number	92
Account Holder	

International Bank Information

[Remove Account](#) [Update](#)

You may have two options:

- To register a new account, click **Add Bank Account**.
- To update your current account, click **Update**.

Mandatory Fields – US Specific (Example is US Specific. In case your bank is outside of US please select the Bank Country)

- 1 - Bank Country (Mandatory) – US
- 2- Bank Number (Mandatory) - Routing Number/ or ABA
- 3 – Account number (Mandatory) – As per documentation
- 4 – Bank Currency (Mandatory) – As per documentation
- 5- Account Holder (Mandatory) – Needs to match Vendor Master and Documentation



Other Taulia Options

Bank Changes

How do I add or update my bank account/information?

Taulia makes it easy to view and manage your company's banking information from Halliburton accounting system. Updates made through the platform are sent to our system for review and approval. Taulia does not change/manage your banking information. The platform only relays information available in Halliburton accounting system.

Click **Next: Verify Bank Data.**

Click **Attach File** and upload supporting documents such as a voided check or EFT Form. (Must be in PDF format)

- **Not acceptable: Instructions on company letterhead not acceptable**
- Acceptable: Void cheque, signed bank letter, completed EFT Form

Click **Review and Save.**

Click **Complete and Save.**

If you have additional questions regarding your registered bank information, please contact iPortal@Halliburton.com



Other Taulia Options

Address Changes

Taulia makes it easy to view and manage your company information from Halliburton's accounting system. Updates made through the platform are sent for review and approval. Taulia does not change/manage your company information. The platform only relays information available in your customer's accounting system.

Before trying to update Address Changes please follow the next instructions:

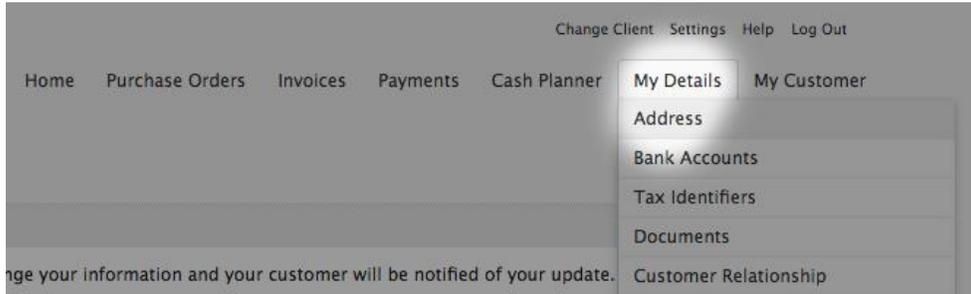
- W9 is required for any new Vendor Name or Address Changes
- If we are updating a Tax ID, please contact Procurement Team to guide on how to get this adjusted via - HalProcSupport@halliburtonsupport.com
- Address Changes: W9 for US located vendors, copy of new invoice/notice of address change for Canada



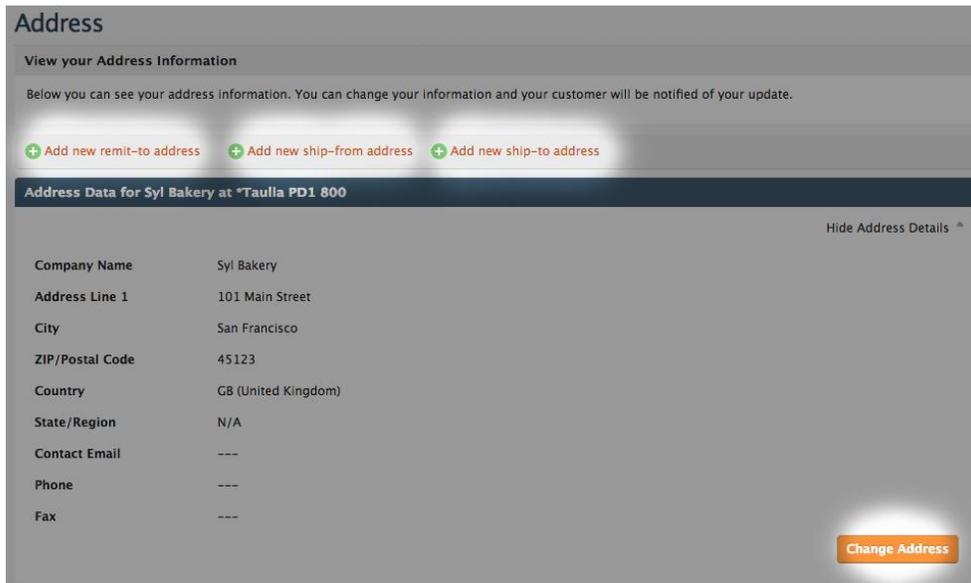
Other Taulia Options

Address Changes

To add/update your address information in the portal, follow the steps below:



Important - If you see Apply Change, this means Halliburton updated your company information in their system. You will need to select Apply Change to show the updated data in the platform. If the information applied is incorrect, just select Update to correct the information. If you complete the update but the old company information is pushed back to the platform, contact Halliburton directly.



- Remit-to address is used to manage different remit-to addresses if you have more than one. This can then be selected from the invoicing screen
- Ship-from and ship-to address are used to manage multiple shipping addresses. These can then be selected from the invoicing screen.

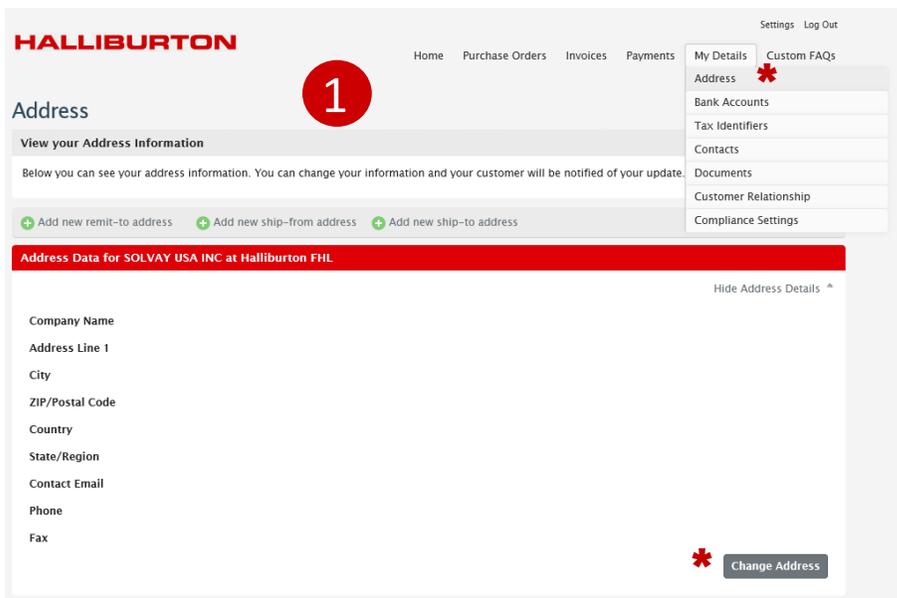


Other Taulia Options

Address Changes – Remit to Address (for Payment)

To add/update your address information in the portal, follow the steps below:

1- Select Address > Change Address



The screenshot shows the Halliburton portal interface. At the top, there is a navigation bar with 'HALLIBURTON' on the left and 'Settings Log Out' on the right. Below the navigation bar, there are several menu items: 'Home', 'Purchase Orders', 'Invoices', 'Payments', 'My Details', and 'Custom FAQs'. A red circle with the number '1' is placed over the 'Address' menu item. A dropdown menu is open under 'Address', showing options like 'Bank Accounts', 'Tax Identifiers', 'Contacts', 'Documents', 'Customer Relationship', and 'Compliance Settings'. Below the menu, there is a section titled 'View your Address Information' with a 'Change Address' button at the bottom right.

2- Complete the changes required in the next screen

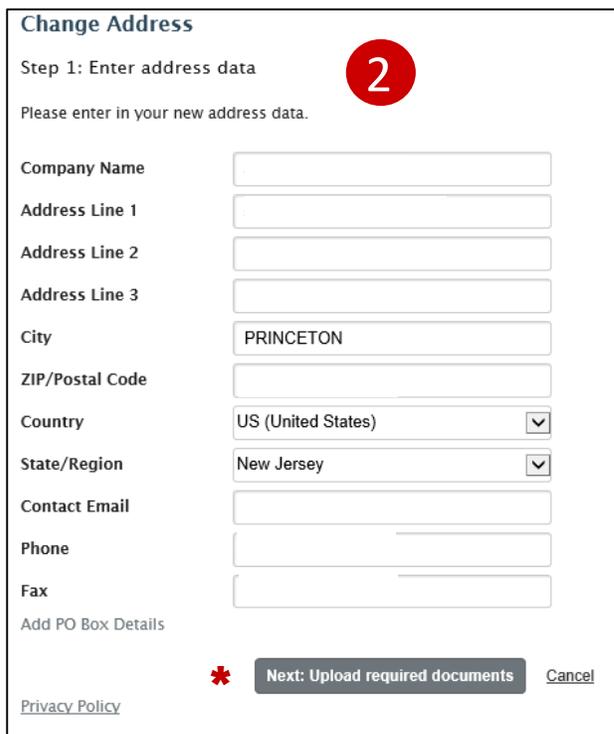
3- Attach the W9 (Mandatory)

4- Click Review and Save

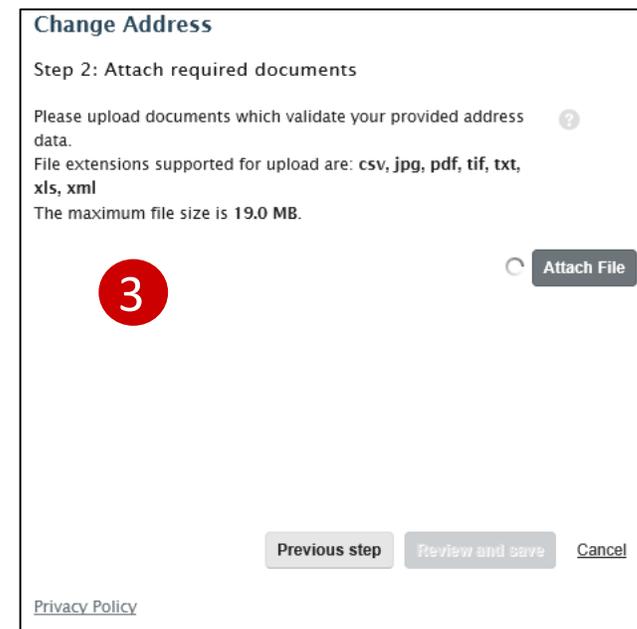
5- Complete and Save (Verify new address data)

Important – If your invoice copy will have a different remit to address compare to Halliburton Vendor Master Data, please follow the next steps to make the changes in the Portal.

Note: If you have more than one vendor # you must update the 5# account with remit to changes.



The screenshot shows the 'Change Address' form, Step 1: Enter address data. The form is titled 'Change Address' and has a red circle with the number '2' next to it. Below the title, it says 'Step 1: Enter address data' and 'Please enter in your new address data.' The form contains several input fields: 'Company Name', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'City' (with 'PRINCETON' entered), 'ZIP/Postal Code', 'Country' (with 'US (United States)' selected), 'State/Region' (with 'New Jersey' selected), 'Contact Email', 'Phone', and 'Fax'. There is a 'Change Address' button at the bottom right. A red asterisk is next to the 'Next: Upload required documents' button.



The screenshot shows the 'Change Address' form, Step 2: Attach required documents. The form is titled 'Change Address' and has a red circle with the number '3' next to it. Below the title, it says 'Step 2: Attach required documents' and 'Please upload documents which validate your provided address data.' It lists supported file extensions: 'csv, jpg, pdf, tif, txt, xls, xml' and states 'The maximum file size is 19.0 MB.' There is an 'Attach File' button. At the bottom, there are 'Previous step', 'Review and save', and 'Cancel' buttons. A 'Privacy Policy' link is at the bottom left.



Other Taulia Options

FAQ

[Q. How do I manage my invoice compliance details?](#)

[Q. How do I start/stop receiving email notifications?](#)

[Q. How do I search for my payments?](#)

[Q. Invoice Reporting](#)



Get up and running with the portal in under 20 minutes with our short training movies.

*Popcorn not included.



HALLIBURTON POINT OF CONTACTS

If you need any assistance regarding E-Invoicing Submission, please contact the following Mailboxes for Support.

HalProcSupport@halliburtonsupport.com – Procurement Support Mailbox

iPortal@Halliburton.com - Issues related to the platform, adding users, Purchase orders not available, and other connection incidents.

FGBSEInvoicing@Halliburton.com - Issues related to E-Send, Invoicing, and Invoices not available in the portal.

