Creating a Credit Memo

Overview

This guide will show you how to manually create a Credit Memo.

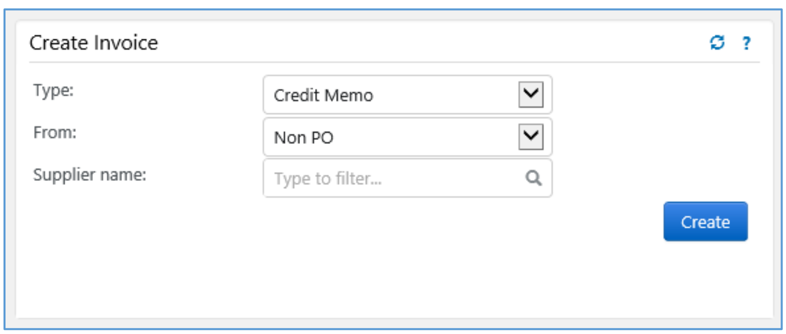
Navigation

Within myUFL, navigate to:

- ⇨ Nav Bar
- ⇨ Main Menu
- ⇨ My Self Service
- ⇨ myUF Marketplace

Process

1. Click on **Accounts Payable icon**. 
2. Click **AP Home**.
3. Within the ***Create Invoice*** section of the dashboard:



- Check the dropdown list says **Credit Memo**.
- Make sure the *From:* dropdown says **Non-PO**.

4. Add the **Supplier Name** to the PO number field.
5. Click **Create**.

From the Simple Manual Entry Tab

6. Modify the **Invoice Date.**
7. Add the **Supplier Invoice Number**.
8. Add a **Description**.
9. Enter the **Subtotal**.
10. Click **Save**.

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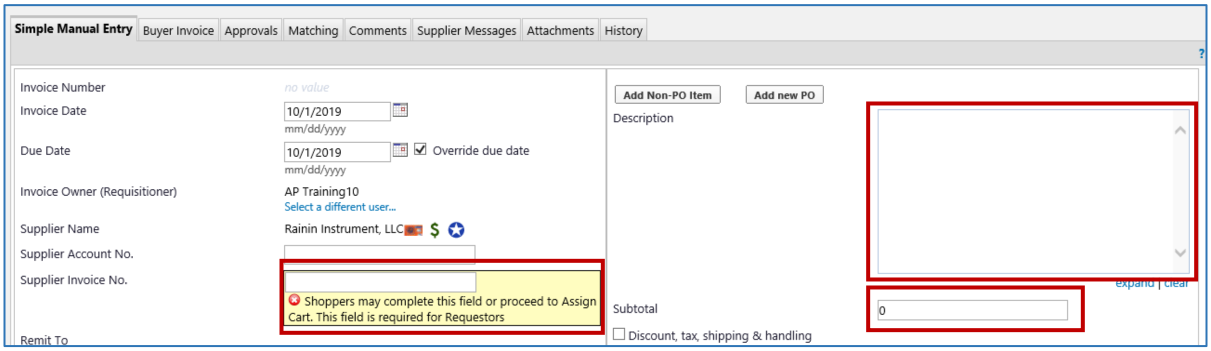

In the **Buyer Invoice** Tab

11. In the General section of the Buyer Invoice tab, click the second **edit button** from the top. This one is located beside the Invoice Date line.
12. If Special Handling is required...In the **Payment Justification** field, select the Handling Code needed, provide the justification, contact information, etc.
13. Click **Add Attachments** and add an internal attachment to the Invoice.
14. Scroll down to add Chartfield information.
15. Add the **PO Business Unit**.
16. Enter your **Chartfield information** (The chartfields below are required on all transactions).
    - Dept ID
    - Fund
    - Program
    - Account
    - Budget Reference
17. Click **Complete.**

Additional Assistance

myUF Marketplace – Marketplace Help Desk

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