Creating a Credit Memo

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

Navigation
Within myUFL, navigate to:

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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.
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**

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myUF Marketplace – Marketplace Help Desk

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