

CREATE CREDIT MEMO

QUICK REFERENCE GUIDE



Step by step

To Create Credit Memo:

Step **Action**

Create Credit Memo	
1.	Click the Workbench tab
2.	Click the Orders tile
3.	Click the PO number
4.	Click Create Invoice and select Credit Memo for a header level credit memo.
5.	Enter the invoice number
6.	(Optional) Input comments
7.	Scroll down to the Adjustment section
8.	In the Adjustment in Subtotal field input the credit amount in negative numbers
9.	(Optional) Click Create tax and add the relevant tax
10.	(Optional) Make negative adjustments for any special handling and shipping as necessary
11.	Click Next and review the credit memo
12.	Click Submit
END	

What now?

The credit number displays on the purchase order under the **related documents** section.
Sent credit memos can be viewed on invoice tiles in the Workbench.

Related information

- Create Invoice for Goods and Services