How to Create Credit Memo

Find and View your Purchase Order

PO is Auto Acknowledged → **Perform PO-Flip to e-Invoice** → **Create a Credit Memo**


1 Once you access the Supplier Profile page, click on the grid-shaped (Rubik's cube) icon i.e., the **'App Launcher' in the upper right-hand corner** to view Purchase Orders, Invoices, Supplier Profile etc. and navigate based on your preference.

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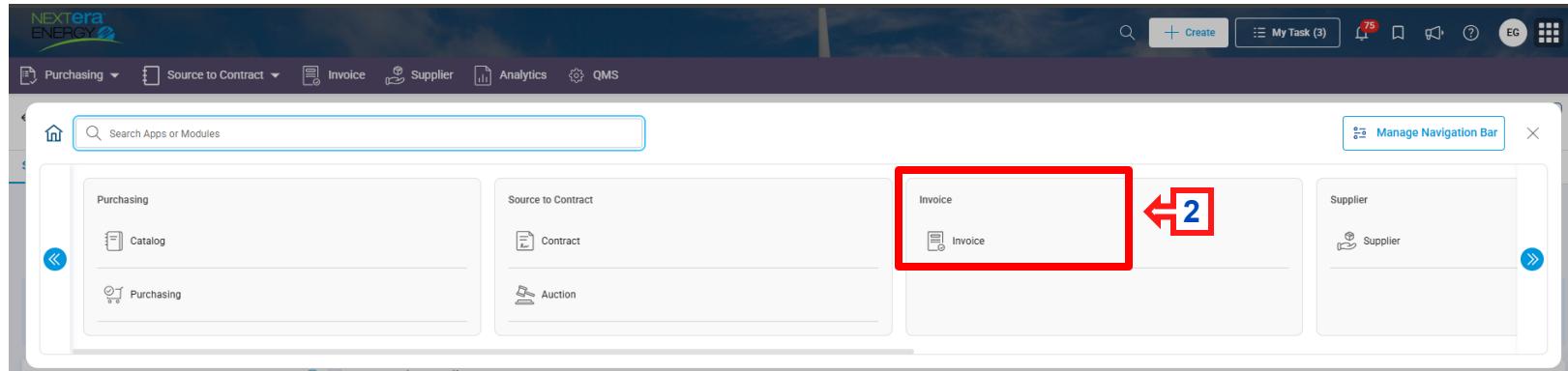
2 Then, select **'Invoice'** from the menu. This will direct you to the Invoicing Section.

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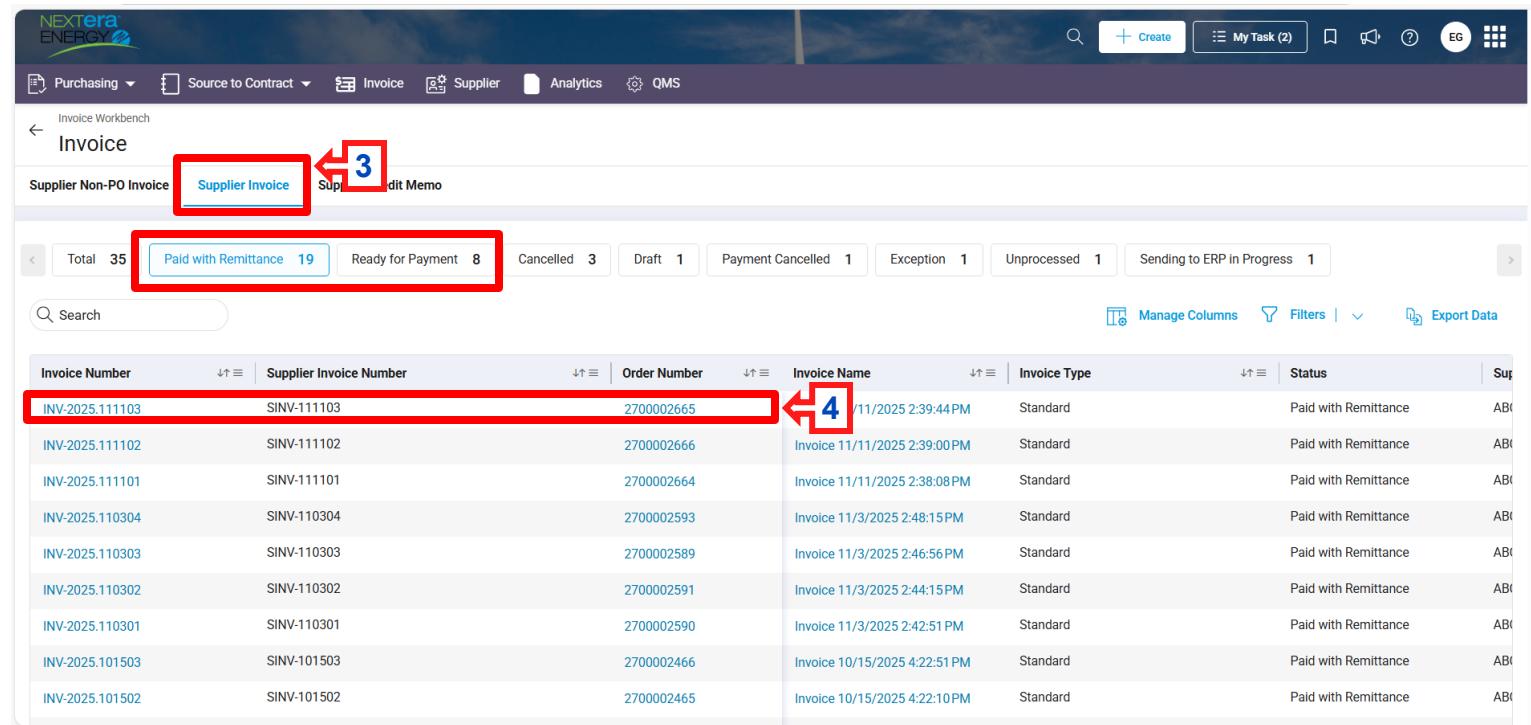
3 — Click on the **'Supplier Invoice'** tab.

Note : Credit Memos can only be created if your invoice has any one of the following as the status – **'Ready for payment or Paid with remittance'**

4 — Click on the **'Specific Invoice Number'** to continue.

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5 In the **'Line Details'** Section, review the lines you wish to include in the credit memo.

6 Click on **'Create Credit Memo'** to continue.

Credit Inputs – Supplier

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7 — Fill in all the mandatory fields of the **'Basic Details'** section: **'Credit Memo Name', 'Credit Memo Amount', 'Supplier Memo Number' & 'Supplier Memo Date'**

8 — In the **'Line Details'** section, enter the credit amount you wish to give for respective lines.

Make sure the total Unit Price for all lines equals to the Credit Memo Amount.

Credit Inputs – Supplier

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9 Verify and **'Submit'** to confirm the line items be invoiced.

10 Click on **'Yes'** on the confirmation pop-up to proceed.
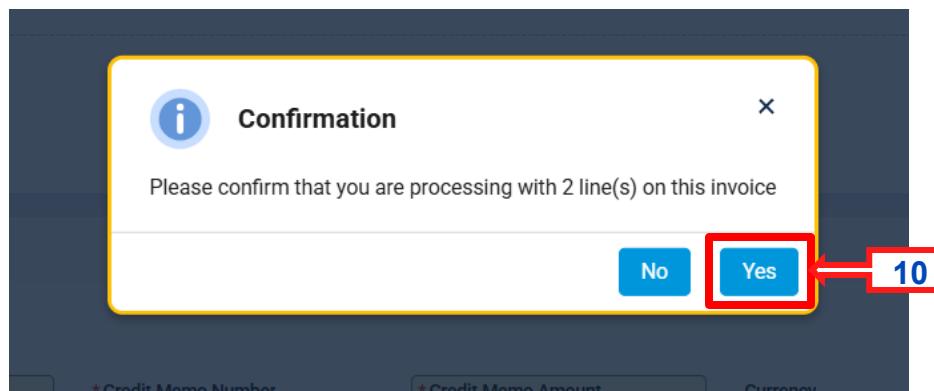
Review Credit Memo Status – Supplier

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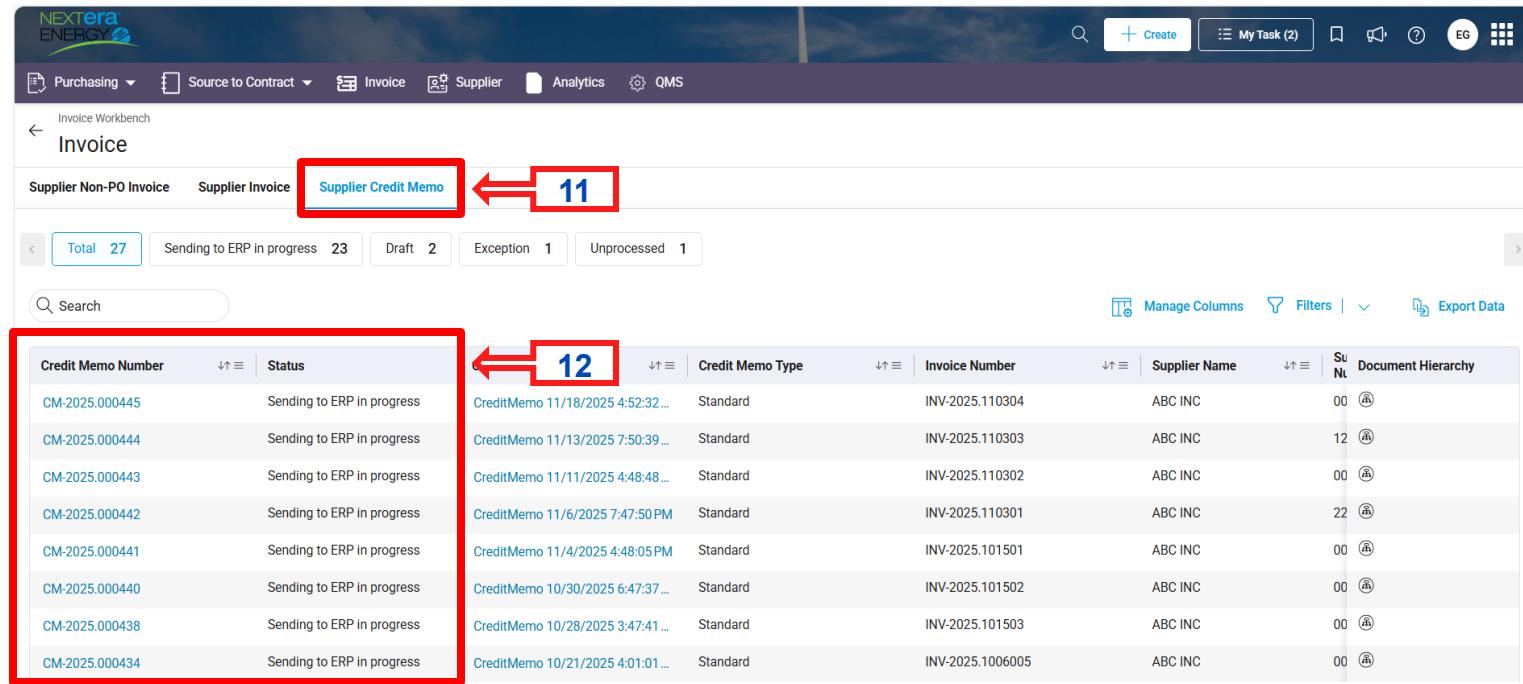
11 Click on '**Supplier Credit Memo**' tab.

12 The submitted credit memo appears with its respective status.

Check the status of your Credit Memo:
- **Draft**: Created but not Submitted
- **Processing In Progress** : Submitted and pending Approval
- **Accepted**: Credit Memo Approved