

## Creating a Credit Memo for an Invoice in the SUS Portal

- 1) Navigate to the Invoices and Credit Memos tab.

The screenshot shows the SAP Supplier Self-Service Portal navigation menu. The 'Invoices and Credit Memos' tab is highlighted with a red box. The menu includes options for Home, Purchase Orders, Invoices and Credit Memos, and Administration. Below the navigation menu, there are sections for Reports, Detailed Navigation, and Portal Favorites.

- 2) The system will display a list of previously submitted invoices and credit memos.

The screenshot shows the SAP Supplier Self-Service Portal displaying a list of invoices and credit memos. The table contains one row for an invoice with number 9100000847.

Type	Number	Name	Date	Status	Gross Price
Invoice	9100000847	ABC March Services	04/22/2021	Document Sent	100,00 USD

- 3) Identify the invoice you would like to reduce or zero out via a credit memo. Click the Invoice number to display the invoice. For this example, we will click invoice 9100000847.

The screenshot shows the SAP Supplier Self-Service Portal displaying the same list of invoices and credit memos. The invoice number 9100000847 is highlighted with a red box.

Type	Number	Name	Date	Status	Gross Price
Invoice	9100000847	ABC March Services	04/22/2021	Document Sent	100,00 USD

4) The system displays the invoice details.

**Supplier Self-Services** Home | Find | Help | FAQ | Log off **SAP**

List of Invoices > Display Invoice

**Display Invoice: 9100000847**

Set Status | Copy | Create Credit Memo | Display Document Flow | Print | Download

Communication and Collaboration

**General Information**

Basic Data		Terms of Payment	
Number:	9100000847	Payment in Days	Discount in %
Name:	ABC March Services	45	0,000
Date:	04/22/2021	0	0,000
External Reference No.:	00000000002000002773	0	
Status:	Document Sent		
Status (New):	Accepted by Customer		
Unplanned Delivery Costs:	0,00 USD		

**Item Overview**

Number	Description	Product	Quantity	Net Value	Tax	External Refer...	Purchase Orde...
10	Services		100,000 Activ.unit	100,00 USD	Not Valid	2000002773	1
			Net Value			100,00 USD	
			Unplanned Delivery Costs			0,00 USD	
			Tax			0,00 USD	
			Gross Price			100,00 USD	

5) Verify the invoice is for the Purchase Order you wish to edit. The External Reference No. will display the purchase order.

**General Information**

Basic Data		Terms of Payment	
Number:	9100000847	Payment in Days	Discount in %
Name:	ABC March Services	45	0,000
Date:	04/22/2021	0	0,000
<b>External Reference No.:</b>	<b>00000000002000002773</b>	0	
Status:	Document Sent		
Status (New):	Accepted by Customer		
Unplanned Delivery Costs:	0,00 USD		

6) Select the Create Credit Memo button.

The screenshot shows the SAP Supplier Self-Services interface. At the top, there is a navigation bar with 'Supplier Self-Services', 'Home | Find | Help | FAQ | Log off', and the SAP logo. Below this, the breadcrumb 'List of Invoices > Display Invoice' is visible. The main content area shows 'Display Invoice: 9100000847'. A toolbar contains buttons for 'Set Status', 'Copy', 'Create Credit Memo' (highlighted with a red box), 'Display Document Flow', 'Print', and 'Download'. Below the toolbar is a 'Communication and Collaboration' section. The 'General Information' section is expanded, showing 'Basic Data' and 'Terms of Payment'.

Basic Data		Terms of Payment	
Number:	9100000847	Payment in Days	Discount in %
Name:	ABC March Services	45	0,000
Date:	04/22/2021	0	0,000
External Reference No.:	0000000002000002773	0	
Status:	Document Sent		
Status (New):	Accepted by Customer		
Unplanned Delivery Costs:	0,00 USD		

7) The Edit Credit Memo screen will be displayed and will default to the full invoice amount. Scroll down to review the credit memo and adjust the Quantity field on the credit memo if needed. The amount should be a positive number and will reduce the invoice amount accordingly.

The screenshot shows the SAP Edit Credit Memo screen. The 'General Information' section is visible, showing 'Basic Data' and 'Terms of Payment'. Below this is the 'Item Overview' section, which includes a table with columns: Number, Description, Product, Quantity, Unit of Measure, Net Value, Tax, External ..., and Purchas... The first row of the table is highlighted with a red box.

Number	Description	Product	Quantity	Unit of Measure	Net Value	Tax	External ...	Purchas...
10	Services		100,000	Activ unit	100,00 USD	Not Valid	2000002...	1
					Net Value			100,00 USD
					Unplanned Delivery Costs			0,00 USD
					Tax			0,00 USD
					Gross Price			100,00 USD

- 8) Once your review is complete, scroll up to click the Send button to submit the Credit Memo.

The screenshot shows the SAP Supplier Self-Services interface for editing a credit memo. The breadcrumb trail is 'List of Invoices > Display Invoice > Edit Credit Memo'. The title is 'Edit Credit Memo: 9100000848'. A toolbar contains buttons for 'Send', 'Save', 'Cancel', 'Update Prices', 'Print', and 'Download'. The 'Send' button is highlighted with a red box. Below the toolbar is a 'Communication and Collaboration' window with a 'Message to Purchaser' text area and an 'Attachments' section containing 'Add Attachment' and 'No Attachments Available'.

- 9) A message will display showing the Credit Memo was successfully sent to CalSTRS. It is good practice to notify your contract manager if you submitted a Credit Memo. This enables the Contract Manager to keep current records of activity related to your vendor account.

The screenshot shows the SAP Supplier Self-Services interface for displaying a credit memo. The breadcrumb trail is 'List of Invoices > Display Invoice > Display Credit Memo'. A green information message is displayed: 'Info: Your changes have been adopted successfully', which is highlighted with a red box. The title is 'Display Credit Memo : 9100000848'. A toolbar contains buttons for 'Set Status', 'Display Document Flow', 'Print', and 'Download'. Below the toolbar is a 'Communication and Collaboration' window.