Vendor Quick Reference Guide

Submitting and Finding a Credit Memo

Overview

This Quick Reference Guide (QRG) shows a user with the **Vendor admin role** how to submit a Credit Memo in the eMaryland Marketplace Advantage (eMMA). It also shows how to find a submitted credit memo and view the status.

NOTE: For best results, use the Google Chrome browser to access eMMA.

If you need help at any time, please reach out to the eMMA helpdesk at emma.helpdesk@maryland.gov.

Prerequisites

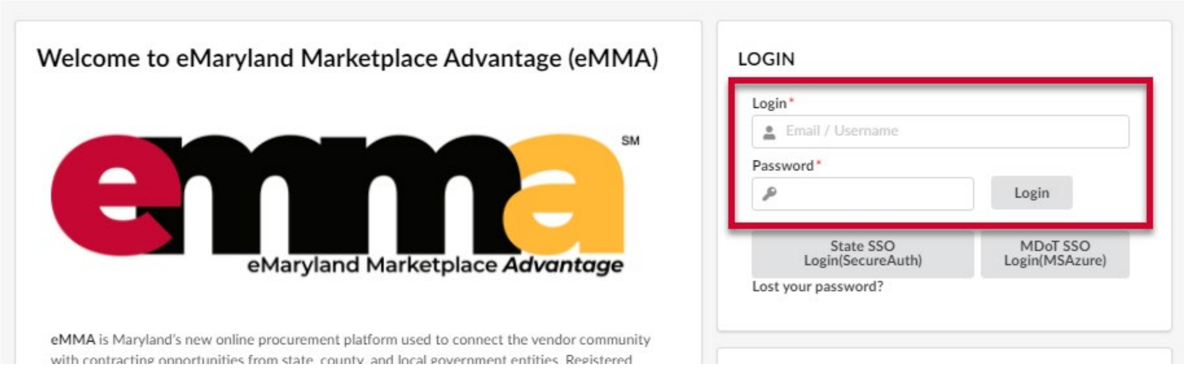
- You will need an existing Purchase Order in eMMA.

Step-by-Step Instructions

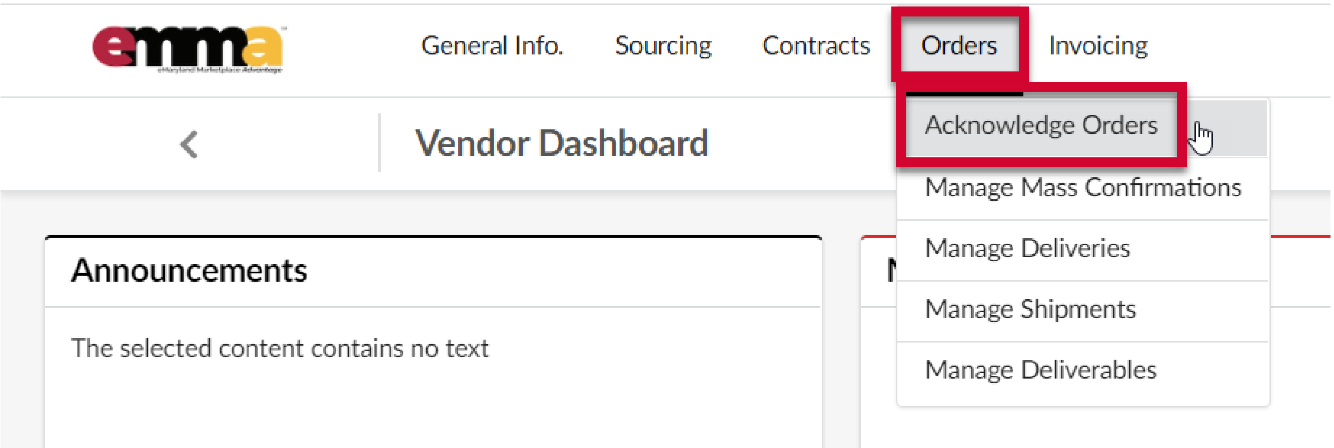
Submitting a Credit Memo

NOTE: This QRG uses diagrams with specific callouts to show required and optional fields in forms. A yellow callout with a red border a indicates a required field, while yellow callouts with a black border b indicate optional fields. Letters within the callouts correspond to the explanations below the diagram. A red asterisk (*) indicates a required field in the eMMA interface.

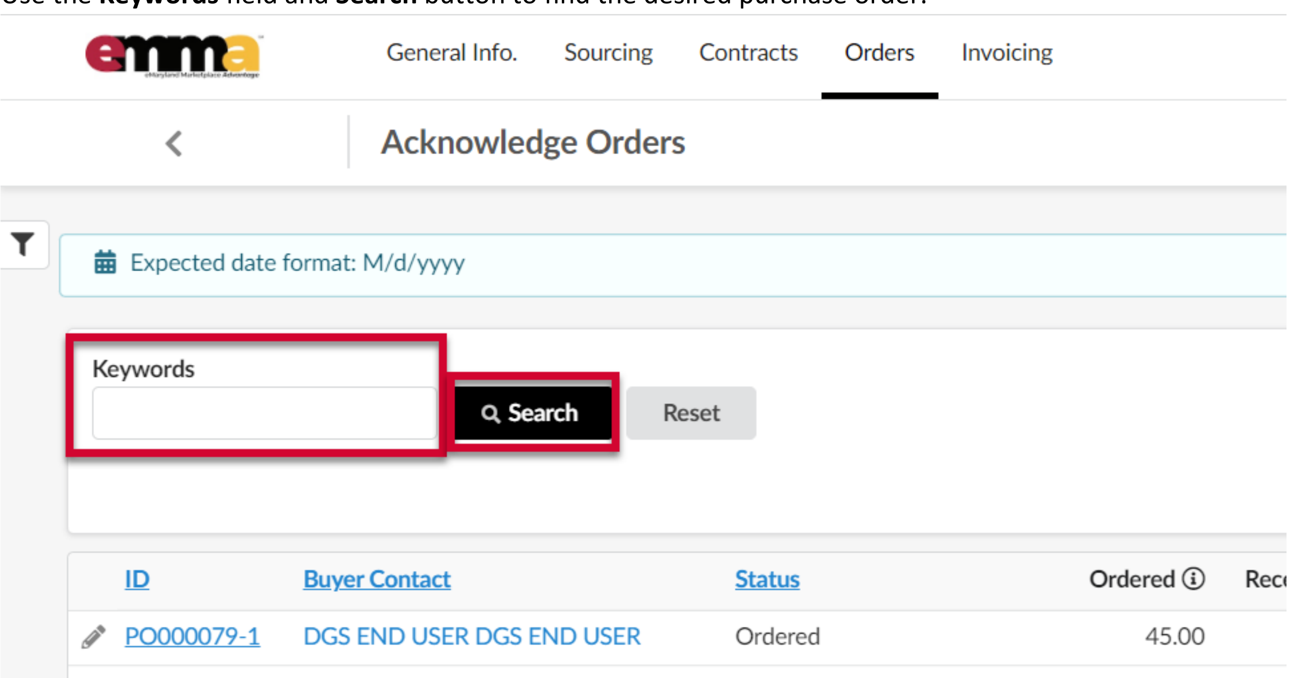
1. Navigate to eMMA at https://emma.maryland.gov and log in with your credentials.



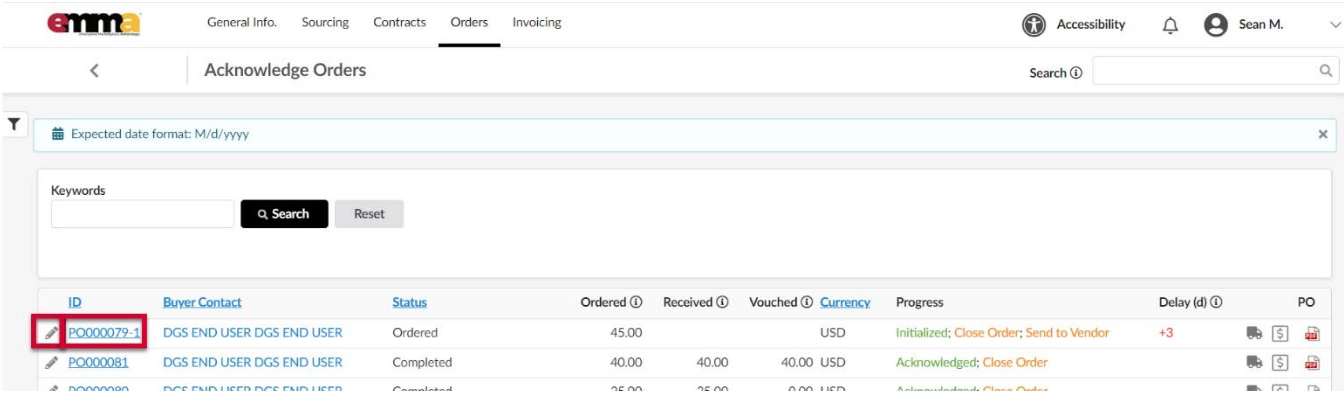
2. Click the **Orders** tab at the top of the webpage to open and select the **Acknowledge Orders** option from the drop-down menu that opens.



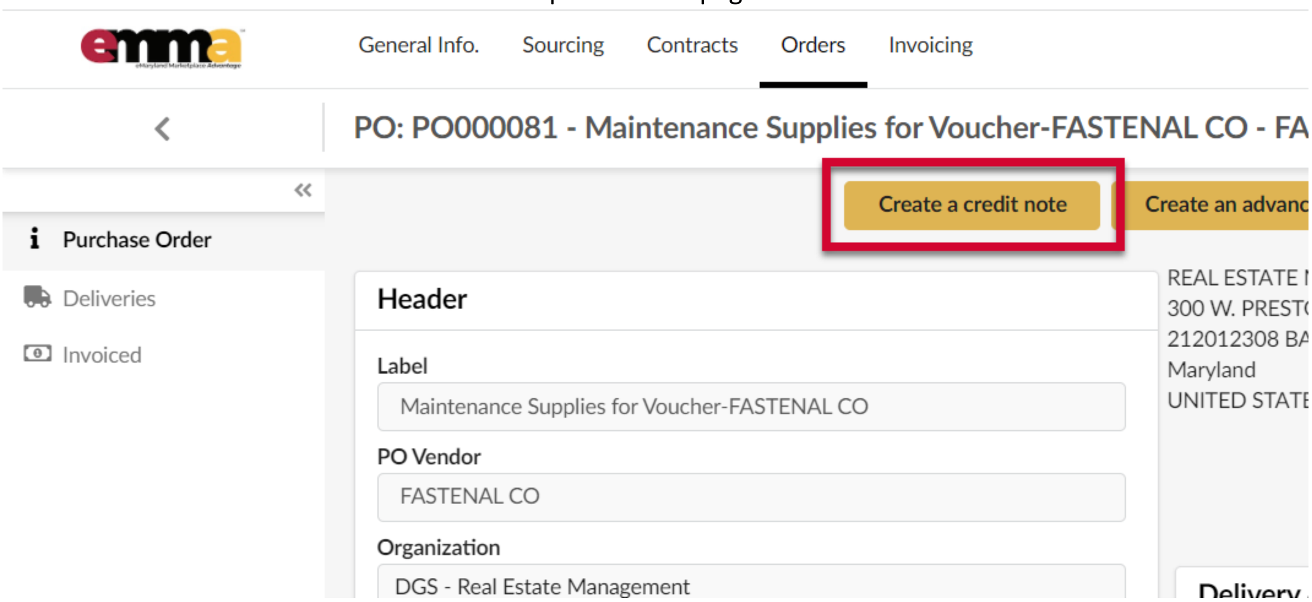
3. Use the **Keywords** field and **Search** button to find the desired purchase order.



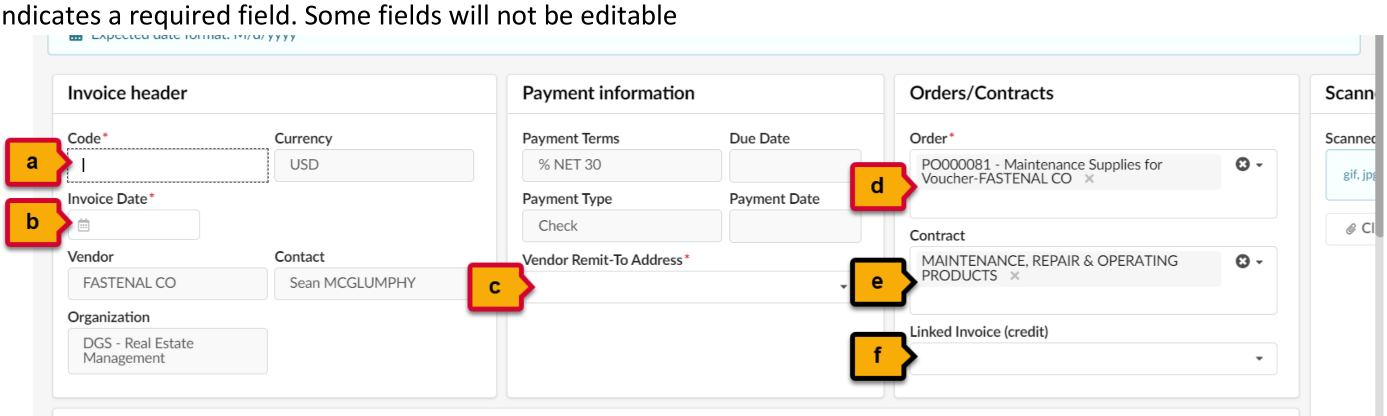
4. Click the Edit (pencil) icon to the left of the Purchase Order ID, or click on the Purchase Order ID link to access the purchase order.



5. Click the **Create a credit note** button at the top of the webpage.



6. Enter relevant information in the fields for the **Invoice Header, Payment information** and **Orders/Contracts** sections. These fields are auto-populated from the purchase order or established voucher. A red asterisk (*) indicates a required field. Some fields will not be editable



a. **Code (*):** Enter the code on the Credit Memo in this field.

b. **Invoice Date (*):** Click this field and select the date on the Credit Memo.

c. **Vendor Remit-To Address (*):** Click this field and select the appropriate Remit-To Address from the drop-down menu.

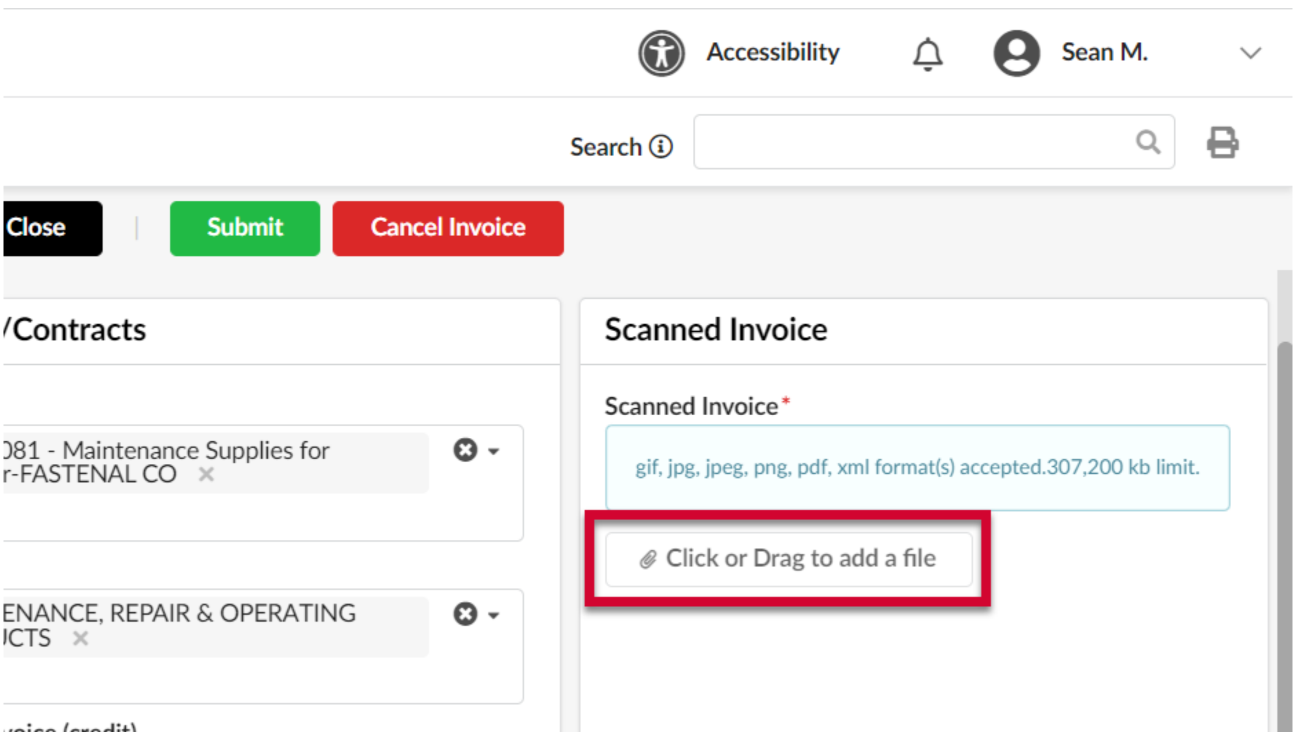
d. **Order (*):** This field is auto-populated from the purchase order. Click this field to change it if necessary.
e. **Contract:** This field is auto-populated from the purchase order. Click this field to change it if necessary.
f. **Linked Invoice (credit):** This field is auto-populated from the purchase order.

NOTE: If there is more than one voucher related to this purchase order, this field will be blank. Click the field and select the appropriate voucher from the drop-down menu.

7. Scroll horizontally to the right and click the **Click or Drag to add a file** button to choose a file from your device or drag and drop the file on this spot to add it. The added file displays below this button. Click the **X** to the left of the document to remove it.

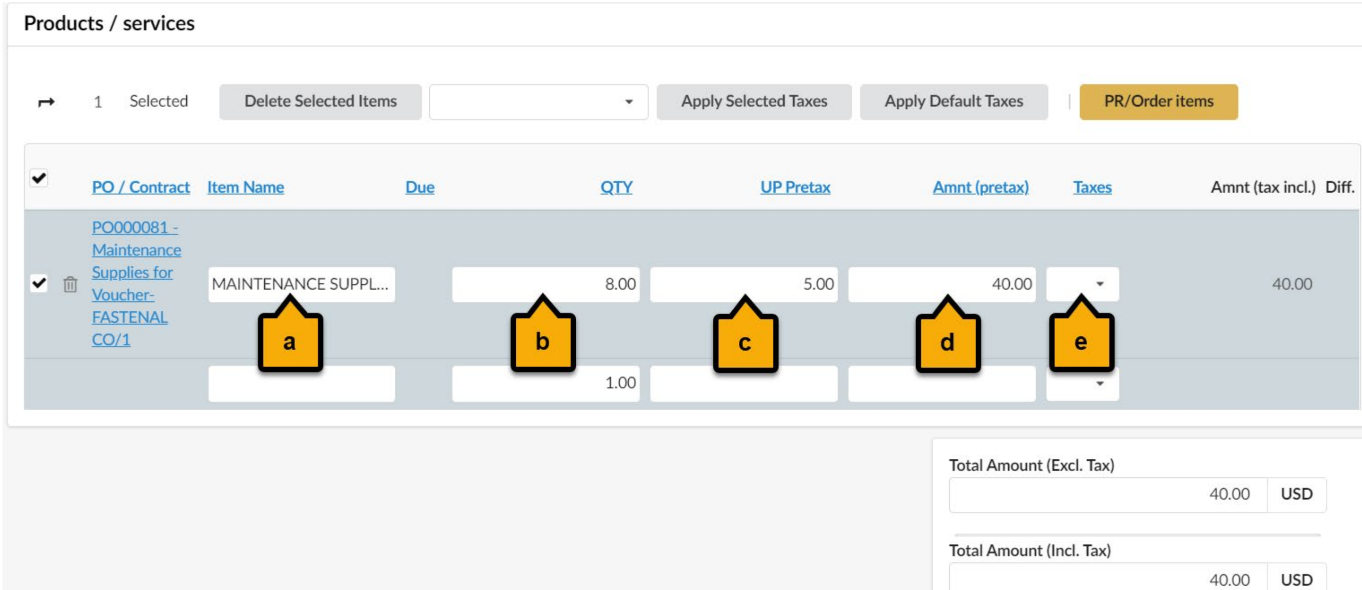
   NOTE: You cannot upload documents over 307,200 KB in size.

   NOTE: Only gif, jpg, jpeg, png, pdf, xml format(s) are accepted.



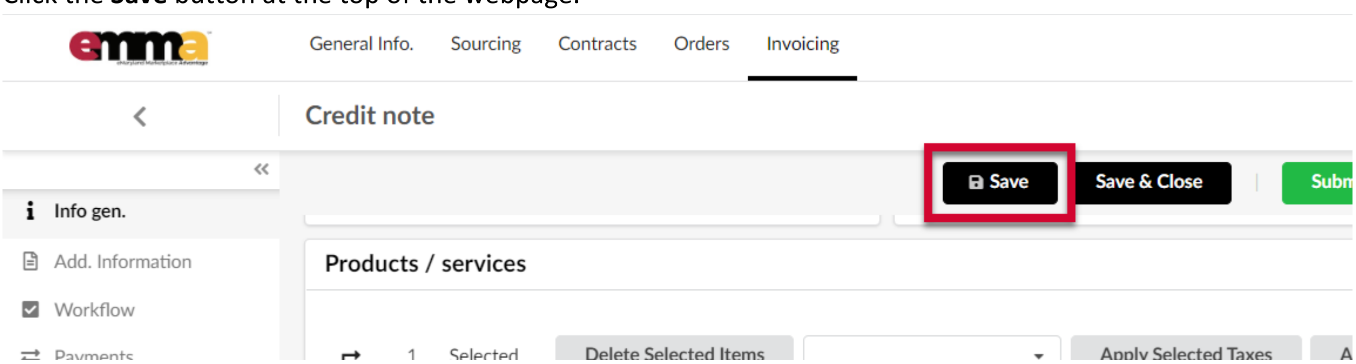
8. Scroll down to the **Product/services** section and select the checkbox to the left of the line-item.

9. Adjust line-items as needed in the fields. The total amount excluding tax and total amount including tax is shown to the right in the area below the line-items.

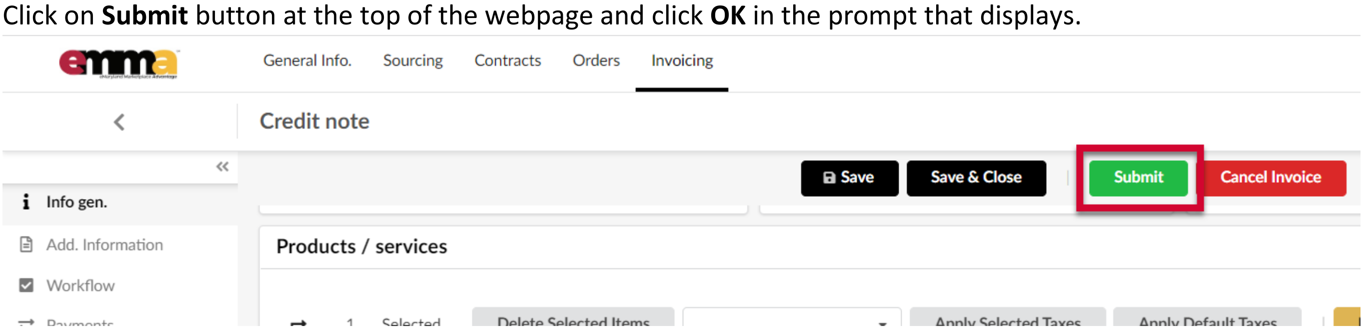


   a. **Item Name:** Enter or adjust the name of this item.
   b. **QTY:** Enter the quantity of the items in this field.
   c. **UP Pretax:** Enter the Unit Price before taxes are added in this field.
   d. **Amnt (pretax):** Enter the cost amount of the unit order before taxes are added in this field.
   e. **Taxes:** Leave this field blank. You will get an error message if you try to save.

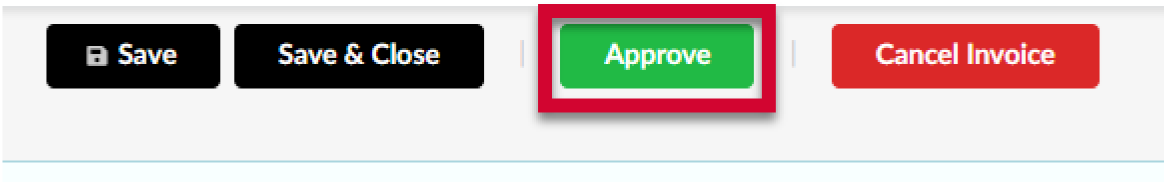
10. Click the **Save** button at the top of the webpage.



11. Click on **Submit** button at the top of the webpage and click **OK** in the prompt that displays.



12. Click the **Approve** button at the top of the webpage.

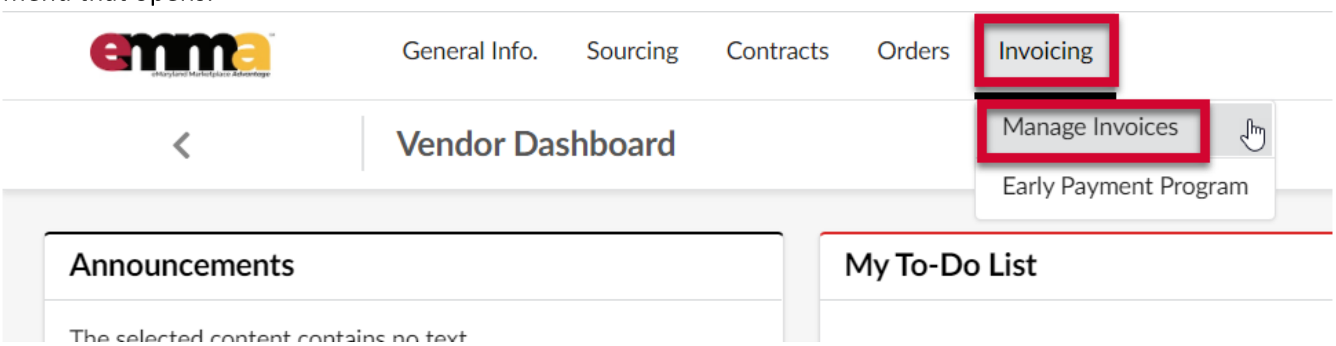


Once you approve the Credit Memo, it is transmitted to the appropriate contact at the state for review.

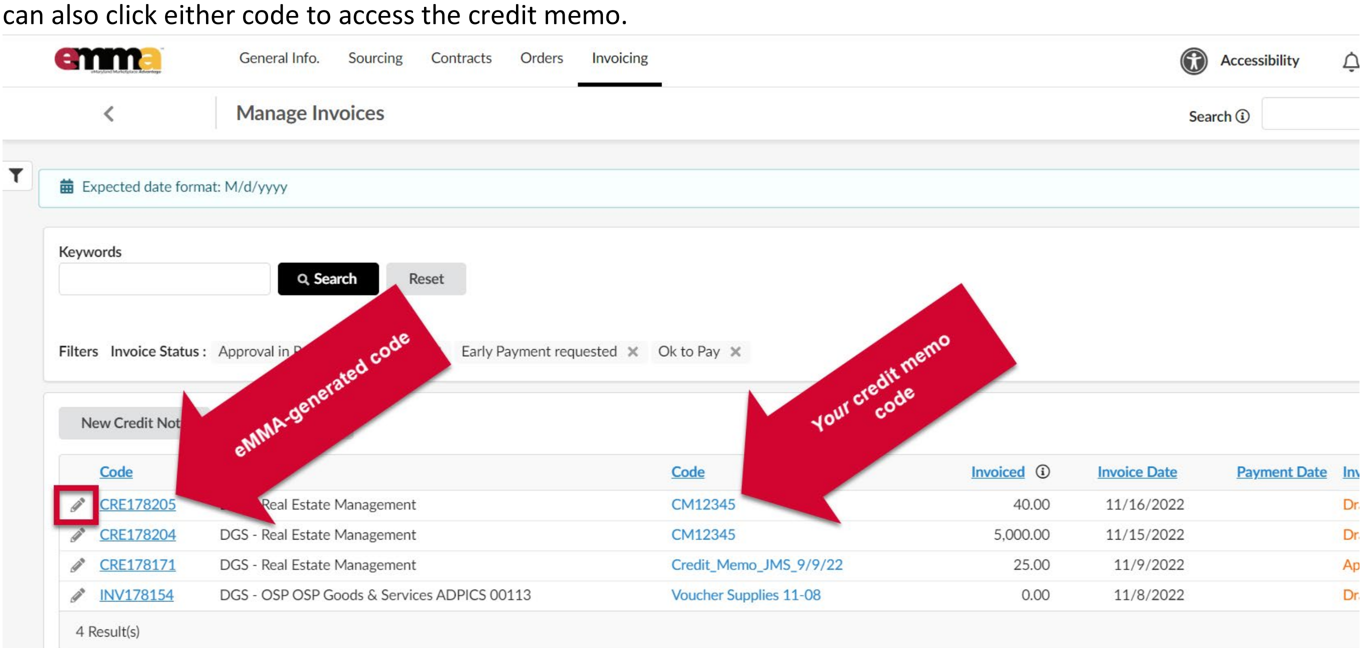
Navigate to Your Credit Memo

If you need to find your credit memo invoice in eMMA, this section demonstrates the steps for how to do that. It starts from the eMMA homepage. Click the eMMA logo on your webpage to go to the homepage.

1. Click the **Invoicing** tab at the top of the webpage and select the **Manage Invoices** option from the drop-down menu that opens.



2. The Code you entered for your credit memo (Step 6a above) is shown on the Manage Invoices page, as is the specific code generated from eMMA. Click the Edit (pencil) icon to the left of the credit memo to access it. You can also click either code to access the credit memo.



Click the **Workflow** tab on the left-hand side-panel in case you need to contact State Employees regarding this Credit Memo. You can also use the Workflow tab to see which State resource has received the Credit Memo or it's processing status. Click the name of the person reviewing the information for contact info, if necessary.