

Supplier Relationship Management (SRM) 7.2

Delete a Purchase Order at the Header

Business Process Procedure

Purpose: Use this procedure to delete a purchase order (PO) that meets strict and specific Header and Line Item criteria. The user must conduct thorough research of the PO in SRM. The PO cannot contain any “Back-End Document Number” in SRM. “Back-End Document Number” in SRM would be “Confirmation(s)” (Goods Receipt(s)), Invoice Receipt(s)....

This research can be done by viewing the “Tracking” tab. The following PO has two “Confirmations” (Goods Receipts) documents. This PO would not be a good candidate for this business process because all of the “Back-End Document Number(s)” would have to be reversed in order to delete this PO at the Header.

Display Purchase Order

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Purchase Order Number: 4600328027 Purchase Order Type: SCEIS Standard PO Status: Ordered Document Date: 04/08/2014 Total Value (Gross): 41,001.12 USD Smart Number: Supplier: [DANA SAFETY SUPPLY](#)

Overview | Header | Items | Notes and Attachments | Approval | **Tracking**

▼ History

View: United States Dollar

Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
Shopping Cart	SABRE RED 01/31/2014 14:08	2000091591		Approved	01/31/2014	37,816.00 USD	
RFx	SABRE RED	5400007363		Published	02/18/2014	N/A	N/A
RFx Response		5500032977		Accepted	04/08/2014	37,964.00 USD	
Purchase Order	SABRE RED	4600328027	4600328027	Ordered	04/08/2014	37,964.00 USD	
Confirmation		20145000692940			04/23/2014	0.00 USD	
Confirmation		20145000692941			04/23/2014	0.00 USD	

The following PO would be a good candidate for this process because it does not contain any “Back-End Document Number” such as Confirmation(s) (Goods Receipt(s)), Invoice Receipt(s) in SRM.

Display Purchase Order

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Purchase Order Number: 4500049904 Purchase Order Type: Inventory PO Status: Ordered Document Date: 04/09/2014 Total Value (Gross): 1,069.63 USD Smart Number: Supplier: [SMITH RUBBER STAMPS & SEALS INC](#)

Overview | Header | Items | Notes and Attachments | Approval | **Tracking**

▼ History

View: United States Dollar

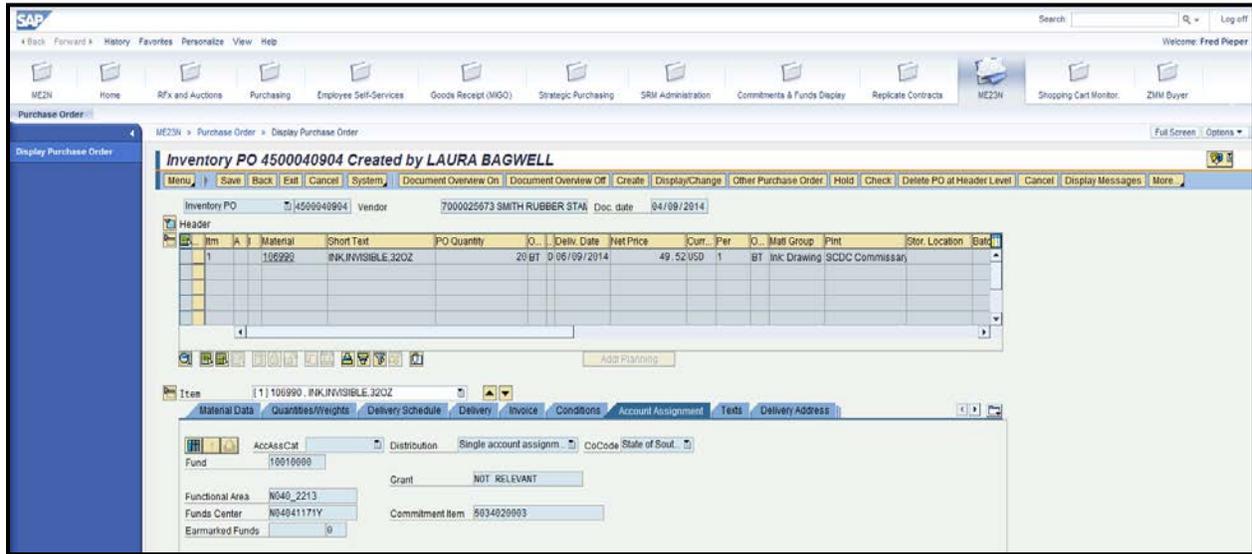
Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
External Requirement	RFC_ECC 04/08/2014 09:29	2000724525	19031176	Approved	04/08/2014	562.80 USD	
Purchase Order	COMMISSARY - SMITH RUBBER	4500049904	4500049904	Ordered	04/09/2014	990.40 USD	

▼ Status

System Status

Created > Complete > Document Completed > Ordered

Here is the same PO from SRM's ME23N tab. Notice there is no Purchase Order History tab.

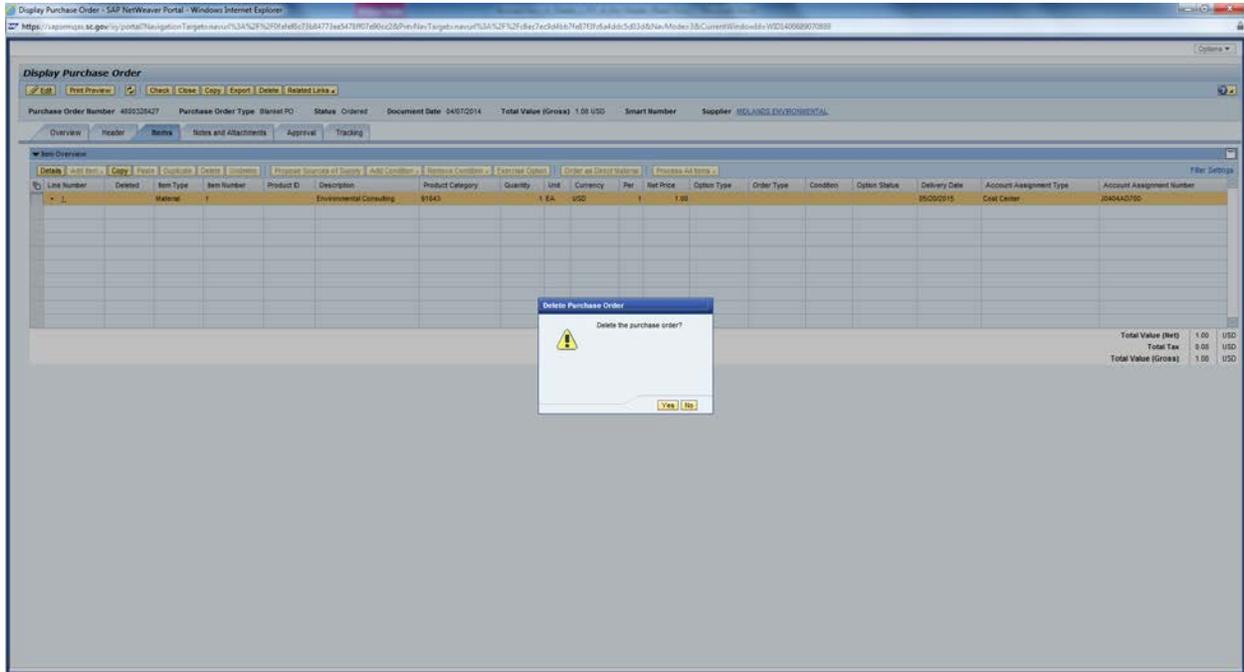


Trigger: This procedure is to be used only when a Buyer has a PO that does not have any Back-End Document Number (follow-on activity). Reasons for deletion may be, but not limited to, the following:

- The wrong Transaction Type was selected when the PO was originally created
- The wrong vendor was selected when the PO was originally created
- The requestor no longer needs the material/service

Process Considerations: Remember when a PO's Line Item(s) is deleted at the Header Level or at the Line Item Level, the PO's associated Shopping Cart will return to Perform Sourcing.

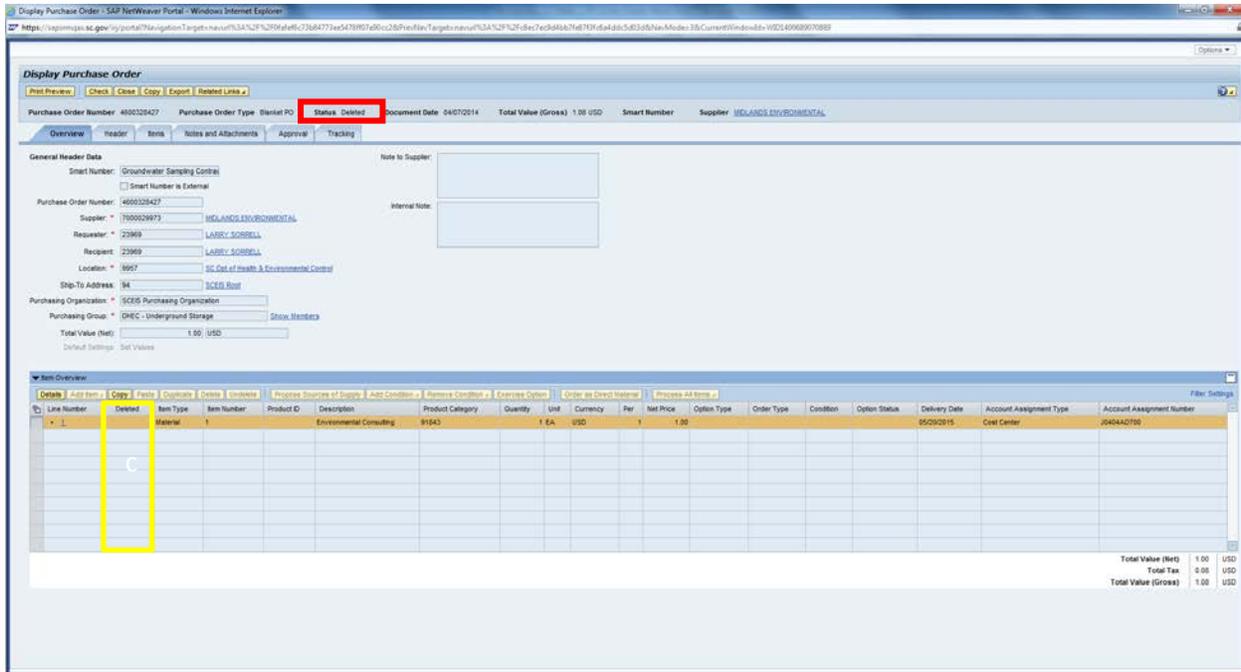
2. The screen below will display with a pop-up asking, “Delete the purchase order?” Click the “Yes” button.



3. The screen below will display a pop-up indicating that the purchase order was deleted. Click the “Close” button.

The screenshot displays the SAP NetWeaver Portal interface for a purchase order. The main window shows the 'Display Document' page for purchase order 4000228427, which is in a 'Deleted' status. A pop-up dialog box titled 'Delete Purchase Order' is centered on the screen, containing the message: 'Purchase Order Deleted By AMY155048 On 05/21/2014'. The pop-up has a 'Close' button at the bottom right. The background interface includes a header with navigation tabs (Overview, Header, Items, Notes and Attachments, Approve, Tracking) and a table with columns for Line Number, Deleted, Item Type, Item Number, Product ID, Description, Product Category, Quantity, Unit, Currency, Per, Net Price, Option Type, Order Type, Condition, Option Status, Delivery Date, Account Assignment Type, and Account Assignment Number. A summary table at the bottom right shows: Total Value (Net) 1.00 USD, Total Tax 0.00 USD, and Total Value (Gross) 1.00 USD.

- Refresh the PO. The status should show **“Deleted.”** Notice the Status of the PO equals **“Deleted.”** With this procedure the line item(s) **do not** receive a **red X** in the Deleted Column of the Item Overview.



Note: The entire PO will be deleted and the shopping cart associated with the PO will return to Perform Sourcing in order to be resourced or rejected.

- The wrong Transaction Type was selected - Resourced
- The wrong vendor was selected - Resourced
- The requestor no longer needs the item - Reject

To verify that the Shopping Cart is available for sourcing:

1. Go to the **“Purchasing”** folder.
2. Click **“Purchasing”** in the Navigation Pane.
3. Click **“Perform Sourcing”** under **“Central Function.”**
4. Enter the shopping cart number in the **“Number of Requisition”** field.
5. Click the **“Search”** button. The shopping cart number will display in the **“Requisition/Item Number”** column of the search results.

To verify in ECC that the purchase order was deleted and the funds unencumbered, follow the steps below:

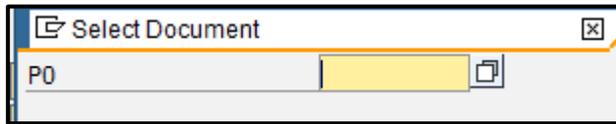
1. Click the “ME23N” Folder.



2. Click the “Other Purchase Order” button.



3. In the “PO” text box, enter the PO Number.



4. Press “Enter” on your keyboard. The Header Status will show 0.00 for all items.

	Active	Ordered	0 FT	0.00 USD
	Not Yet Sent	Delivered	0 FT	0.00 USD
	Not Delivered	Still to deliv.	0 FT	0.00 USD
	Not Invoiced	Invoiced	0 FT	0.00 USD
		Down paymts		0.00 USD

5. A trash can will display on the line item(s).



Note: The user will need to have the FM Display role in order to verify that the funds have been unencumbered using the following process.

1. Click the “Menu” button, and from the drop-down list select “Environment.”



2. Then select “AC Commitment Documents.”



3. Double-click on Object Text Type “Funds Management.”



4. The FM Document Journal will display. The funds for each line should show \$0.00.

Document Journal																										
Menu Back Exit Cancel System Choose Details Sort in Ascending Order Sort in Descending Order Set Filter Total Subtotals Print Preview Local File Mail Recipient ABC Analysis Graphic View Change Layout Selected Layout Save Layout More...																										
Document Journal																										
FM Area SC01																										
Year Commitment Item 2014																										
Commitment Item																										
Funds Center																										
Fund																										
Layout #FM PUR REQ																										
User AMYSS848																										
Date/Time 05/21/2014 12:27:09																										
Val type	test	VT	FM	catg d.	RelDocNo	Li.	Amt type	Amt type	*Pymt Bdg	Y.	GL Account	Funds Cen.	Functional Area	Fund	Grant	FC no.	CI test	Vendor	Cost Ctr	Pmt Doc No	Prd	Period	Prtg Date	Year	Entry Date	Entered at
Purchase Orders	51	05/21/2014	4500328427	1	0150	Change	1.09	2014	5021360002	J0404AD700	J040_00055905007	49840000	NOT RELEVANTUST	UST AND SUPER67000029973	11	011/2014	04/07/2014	04/07/2014	12:23:43							
Purchase Orders	51	04/07/2014	4500328427	1	0100	Original	1.08		5021360002	J0404AD700	J040_00055905007	49840000	NOT RELEVANTUST	UST AND SUPER67000029973	10	010/2014	04/07/2014	04/07/2014	12:22:58							
							1	+	0.00																	
								**	0.00	2014																
								***	0.00																	

You have successfully deleted a purchase order and verified that the funds have been unencumbered.