Supplier Relationship Management (SRM) 7.2

Delete a Purchase Order at the Line Item

Business Process Procedure

Purpose: Use this procedure to delete a line item(s) of a multi-line purchase order (PO).

Research must be done to determine if the PO has any activity against the line item that you require to be deleted. This research can be done by viewing the "Details" of the line item(s) you require to be deleted and viewing the "Related Documents" tab.

Trigger: This procedure is to be used only when a Buyer has a multi-line item PO that does not have any follow-on activity and does not need to delete the entire PO. Reasons for deletion may be, but not limited to, the following:
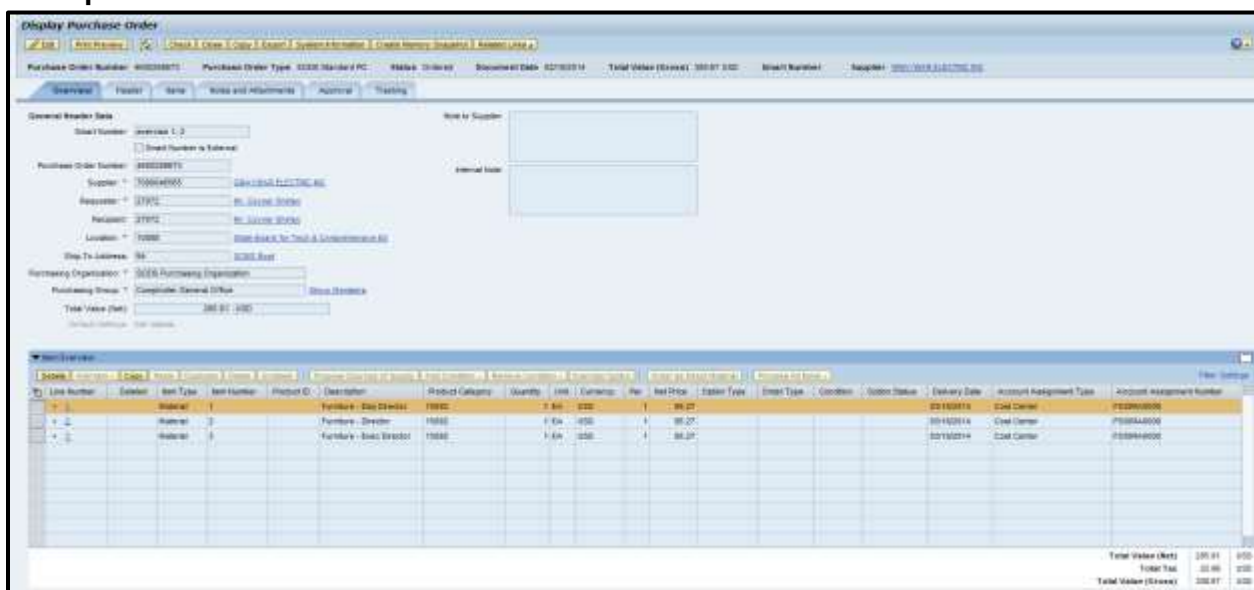
- The requestor no longer needs an item on the PO
- The item can be procured by another vendor at a better value
- The current vendor can no longer provide the item

Special Note: This procedure is not recommended for use in deleting all the Line Items on the PO. To delete all Line Items of the PO, follow instructions on "Delete a Purchase Order at the Header."

Delete Purchase Order at Line Item Level

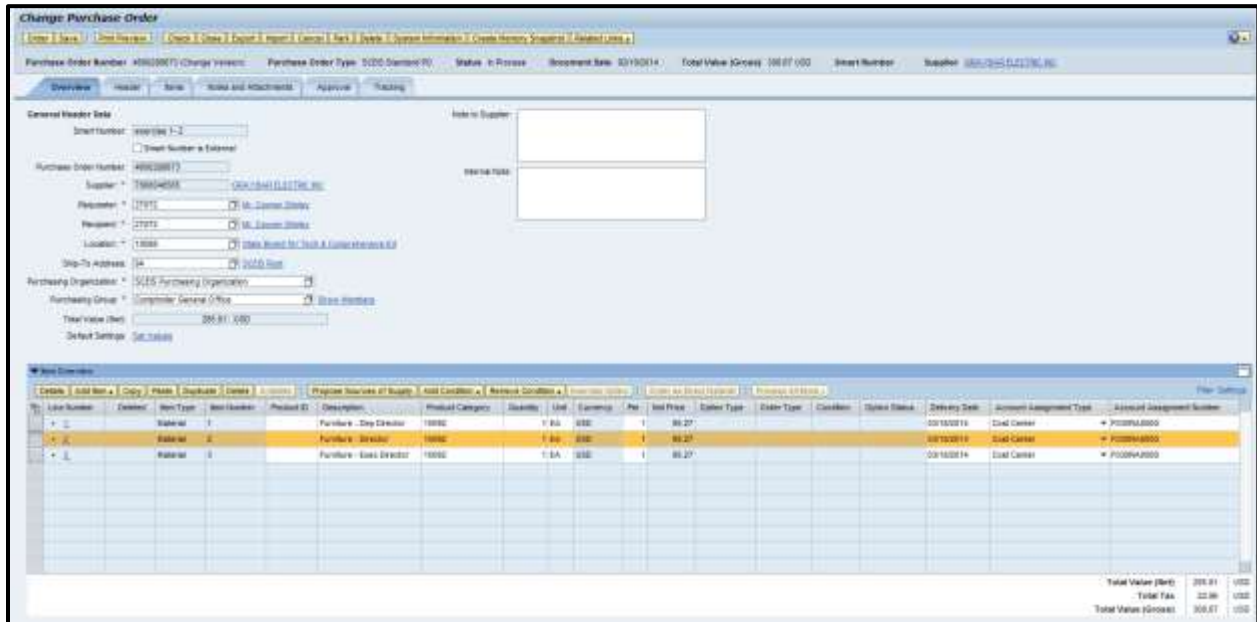1. To delete a line item(s), click the **"Edit"** button of the required PO as shown in Example 1.
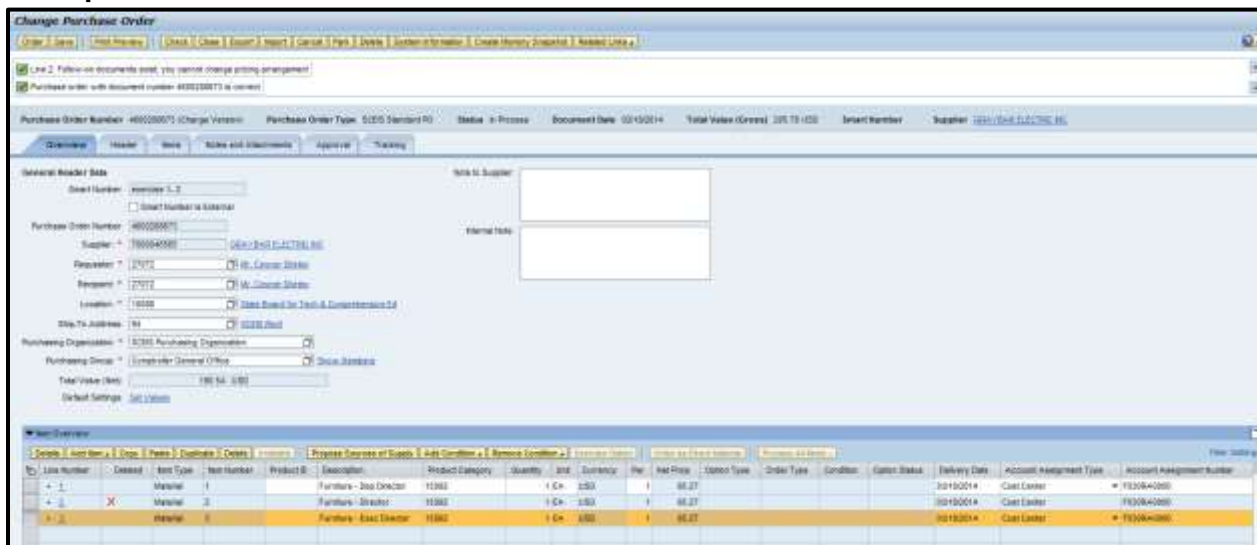
Example 1

2. As shown in Example 2, the PO mode is **"Change Purchase Order."** Highlight the line item to be deleted and click the **"Delete"** button under the **"Items"** tab.

Example 2

3. A red X will display on the line you deleted. See the deletion of line item 2 in Example 3 below. Follow these steps for all line items that require deleting. (***The line item you are deleting must not have any activity against it or the system will not allow you to delete.*** Click the **"Order"** button.

Example 3

4. The screen in Example 4 will display. Notice that the Status is **"Awaiting Approval."**

Example 4

5. Click the **"Refresh"** icon until the PO is in a Status of **"Ordered"** as shown in Example 5.
6. Click the "Close" button.
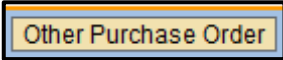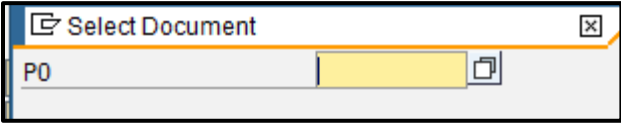
Example 5

**To verify that the Shopping Cart line item 6 (2000XXXXXX) is available for sourcing:**
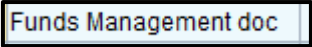
1. Go to the **"Purchasing"** folder.
2. Click **"Purchasing"** in the Navigation Pane.
3. Click **"Perform Sourcing"** under **"Central Function."**
4. Enter the shopping cart number in the **"Number of Requisition"** field.
5. Click the **"Search"** button. The shopping cart number will display in the **"Requisition/Item Number"** column of the search results.

To verify in ECC that the line item(s) has been 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.
5. Line Item 6 that was deleted in this example will have a trash can on the line item.
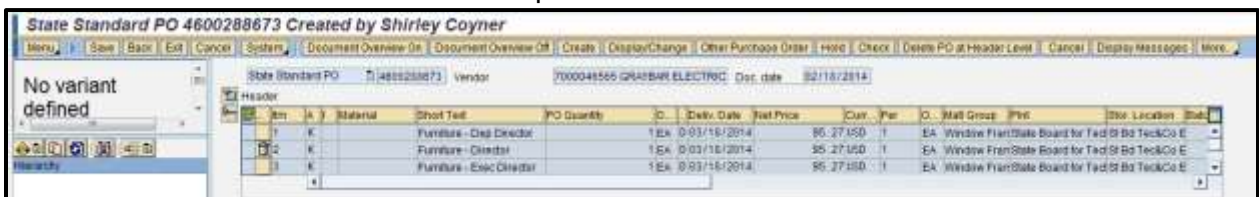
Note: The user will need to have the FM Display role in order to verify that the funds have been unencumbered using the following process.

1. Click the **"Menu"** button, and from the drop-down list select **"Environment."**

2. Select **"AC Commitment Documents."**

3. Double-click Object Text Type **"Funds Management."**

4. The FM **"Document Journal"** will display. The funds for line item 2 will show $0.00.

You have successfully deleted a line item on a Purchase Order and verified that the funds have been unencumbered.