Deleting Purchase Orders

This procedure will demonstrate the proper way to delete Purchase Orders. Purchase Orders or line items should be deleted if:

- Purchase Order or line item is no longer required
- Line item was entered incorrectly and needs to be deleted and re-entered as a new line item.

This EUP will review the two ways of deleting Purchase Orders in SRM

 Delete the entire Purchase Order before the Purchase Order has been Ordered and is in a Saved status. Delete all or some of the line items on the Purchase Order after the Purchase Order was Ordered

Deleting a Purchase Order in a Saved status, that was never "Ordered"

- This section will discuss how to delete the entire Purchase Order before the Purchase Order has been ordered
 - The Purchase Order was created in SRM and "Saved" (i.e., never "Ordered")
 - Verify the Purchase Order is in a Saved status (never ordered) and has never been replicated to SAP. Purchase Order replication to SAP did not occur, and deletion at the <u>Header level</u> can be executed in SRM

Note: Purchase Orders are replicated (copied) to SAP so the suppliers can be paid. The Commonwealth's financial system resides in SAP.

View: [Standard View] Export 4	Create Purchase Order Create with Refer	ence 🖌 Copy	Display Edit Delete Purchase	e Order Res	sponse a Notify Recipient Print Preview	Refresh	۲ ک	Ŗ
Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency	
<u>4300005341</u>	1234-1234-1234-1234-2517 TIRES	1	215/75R15 Radial Tires	Saved	BRIDGESTONE/FIRESTONE TIRE	9,385.00	USD	1
<u>4300005341</u>	1234-1234-1234-1234-2517 TIRES	2	225/70R17 Radial Tires	Saved	BRIDGESTONE/FIRESTONE TIRE	9,385.00	USD	
4300005334	1234-{NEW}	1	Managerial Seating	Saved	HAWORTH FURNITURE COMPANY	565.95	USD	
4300005330	Eshleman Test PO 4-11-2013	1	Test Cart Eshleman1 4-11-2013	Saved		550.00	USD	
4300005329	Eshleman Test Purchase Order 1 4-11-2013	1	sadfsfsdf	Saved		99,999,994.00	USD	
4300005325	1234-0024	1	TEST	Saved	ASAP SOFTWARE EXPRESS	30.00	USD	
4300005254	P00029729 04/09/2013 14:06	1	DURA PC1604	Saved	SCHAEDLER YESCO DISTRIBUTION INC	113.88	USD	
4300005254	P00029729 04/09/2013 14:06	2	DURA PC1604	Saved	SCHAEDLER YESCO DISTRIBUTION INC	113.88	USD	
4300005209	P00029729 03/07/2013 11:42	1	test	Saved	EDWIN L HEIM CO	1,000.00	USD	
4300005208	P00029729 03/07/2013 11:42	1	test	Saved	EDWIN L HEIM CO	1,000.00	USD	1
					Last Refresh	04/18/2013 08:25:3	1 EST Refr	e

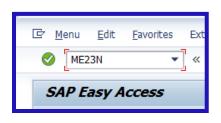
- 1. Verify that the Purchase Order does not exist in SAP
 - a. Select the SAP Logon Pad



b. Select Procurement from the Connections folder

🔄 SAP Logon Pad 740			
Log <u>O</u> n 🗋 🖉 📅 🖬 🔛 🖹			ज ज
 Favorites Shortcuts Connections 	Name Budget Preparation (BPC) Budget Preparation (SEM) Business Warehouse Reports Finance & Budget Execution RHR/Payroll Plant Maintenance	<u> </u>	System Description

c. SAP will open to the Easy Access screen. Enter ME23N into the Transaction Field



- d. Select the Other Document icon and enter the Purchase Order number in the Purchase Order field
- e. Select the Other Document button

Document Overview On 🛛 🖒 😚 📑	Print
🕞 Select Document	×
Pur. Order 4300029417	
 Pur. Order Purch. Requisition SRM Contract 	
Other Documen	t X

- 2. If a message displays stating that the document does not exist, proceed with deleting at the Header Level.
 - a. If the Purchase Order displays, you will have to delete at the line item level. (instructions in the Delete SRM Purchase Order after it was "Ordered" section)

C	P Messag	les	Z				
	Тур	Message text	LT×t				
	Document 4300029417 does not exist □ △ No authorization for the selected archiving action						
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	v	Edit 🔞 🎸 🖌 🔸 🕨 🌾 📇 🐺 🚍 🕵 🕒 🎁 🎇 👜 0 💓 1 🛆 0 💷 1		×			

3. Go back to SRM and select the Edit button to activate the Edit mode. Once in Edit mode, the Delete button will be available at the Header level

Display Purchase Order								
Edit Print Preview 🗘 Check	Close Copy Related Links							
Purchase Order Number 4300383011	Purchase Order Type Standard PO							

- 4. Select the Delete button at the Header level of the SRM Purchase Order.
- 5. The Purchase Order is now deleted from the system and cannot be viewed.

Change Purchase Order								
Read Only Order Save Print Preview Check Close Delete Related Links a								
Purchase Order Number 4300383011 Purchase Order Type Standard PO Status Saved								

Delete SRM Purchase Order after it was "Ordered"

- This section will discuss how to delete all or some of the line items on the Purchase Order after the Purchase Order was ordered
 - Verify the Purchase Order is in an Ordered status and has been replicated to SAP when the Order button was selected
- View: [Standard View] 💌 | Create Purchase Order Create with Reference 🛛 Copy | Display Edit Delete | Purchase Order Response 🖉 Notify Recipient Print Preview | Refresh 7 & Export 4 Item Number Item Name Status Supplier Name Total Value Currency Purchase Order Number Purchase Order Name Ordered ARBILL INDUSTRIES INC Local Purchase Order1 P00446880 04/15/20 10,681.73 USD 4300005340 1 Nitro Auto Darkening Welding Helmet MicroMax NS CoolSuit Polypro Back Sz L Local Purchase Order1 P00446880 04/15/20 2 Ordered ARBILL INDUSTRIES INC 4300005340 10,681.73 USD
 Local Purchase Order1 P00446880 04/15/20
 3
 MicroMax NS CoolSuit Polypro Back Sz XL

 Local Purchase Order1 P00446880 04/15/20
 4
 AirWave N95 Disposable Resperator sz M/L
 Ordered ARBILL INDUSTRIES INC 4300005340 10,681.73 USD 4300005340 AirWave N95 Disposable Resperator sz M/L Ordered ARBILL INDUSTRIES INC 10.681.73 USD Local Purchase Order1 P00446880 04/15/20 DP4 Headgear Clear Visor Shade 5 Flip Ordered ARBILL INDUSTRIES INC 4300005340 5 10.681.73 USD SafeBack Premium szXL back support Local Purchase Order1 P00446880 04/15/20 Ordered ARBILL INDUSTRIES INC 10.681.73 USD 4300005340 6 Local Purchase Order1 P00446880 04/15/20 7 Hycar apron black 34 in. x 48 in. Ordered ARBILL INDUSTRIES INC 10,681.73 USD 4300005340 4300005340 Local Purchase Order1 P00446880 04/15/20 8 fire extinguisher 20 lbs 10-A 80-B 80-C Ordered ARBILL INDUSTRIES INC 10,681.73 USD 2 Last Refresh 04/17/2013 11:26:20 EST Refresh
- o Deletion of the Purchase Order will occur at the Line Item level

- 1. Locate and open the Purchase Order.
- 2. Select the Edit button

Display Purchase Order								
Edit Print Preview Check Close Copy Related Links								
Purchase Order Number 4300383011 Purchase Order Type Standard PO								

- 3. On the Items tab, select the line item(s) that are to be deleted and select the Delete button
 - a. Once deleted, a red "X" will display in the Deleted column

d Item ∡ Cop er Deleted	-	uplicate Dele		Propose Sources of Supply Add Co	ndition 🖌 Remove C	ondition 4											
er Deleted	Item Type	Hom Number		Details Add Item Copy Paste Duplicat Delete Jndelete Propose Sources of Supply Add Condition A Remove Condition Condition Process All Items A													
		item number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition			
	Material	1		Nitro Auto Darkening Welding Helmet	46180000	25.000	EA	206.89	USD	1	206.89						
	Material	2		MicroMax NS CoolSuit Polypro Back Sz L	46180000	5.000	CS	85.08	USD	1	85.08						
	Material	3		MicroMax NS CoolSuit Polypro Back Sz XL	46180000	5.000	CS	89.54	USD	1	89.54						
	Material	4		AirWave N95 Disposable Resperator sz M/L	46180000	20.000	BOX	14.90	USD	1	14.90						
	Material	5		DP4 Headgear Clear Visor Shade 5 Flip	46180000	20.000	EA	55.82	USD	1	55.82						
	Material	6		SafeBack Premium szXL back support	46180000	20.000	EA	20.81	USD	1	20.81						
	Material	7		Hycar apron black 34 in. x 48 in.	46180000	21.000	EA	22.58	USD	1	22.58						
	Material	8		fire extinguisher 20 lbs 10-A 80-B 80-C	46180000	20.000	EA	116.58	USD	1	116.58						
	Material 💌	0				0.000		0.00	USD	0	0.00						
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Material 8 fire extinguisher 20 lbs 10-A 80-B 80-C Material 9	Material 2 MicroMax NS CoolSuit Polypro Back Sz L 46180000 Material 3 MicroMax NS CoolSuit Polypro Back Sz XL 46180000 Material 4 AirWave NS5 Disposable Resperator sz ML 46180000 Material 5 DP4 Headgear Clear Visor Shade 5 Flip 46180000 Material 6 SafeBack Premium szXL back support 46180000 Material 7 Hycar aprion black S4 in. x 48 in. 46180000 Material 8 fre extinguisher 20 lbs 10-A 80-B 80-C 46180000 Material 9 46180000 46180000	Material 2 MicroMax NS CoolSuit Polypro Back Sz L 46180000 5.000 Material 3 MicroMax NS CoolSuit Polypro Back Sz XL 46180000 5.000 Material 4 AirWave NS5 Disposable Resperator sz ML 46180000 20.000 Material 5 DP4 Headgear Clear Visor Shade 5 Flip 46180000 20.000 Material 6 SafeBack Premium szXL back support 46180000 20.000 Material 6 SafeBack Areminus zXL back support 46180000 20.000 Material 8 fre extinguisher 20 lbs 10-A 80-B 80-C 46180000 20.000 Material 9 0 0.000 0.000 0.000	Material 2 MicroMax 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4. Select the ORDER button to replicate the changes to SAP



5. The line items deleted in SRM are replicated to SAP and identified with Trash Can icons

ĥ	ZNB SRM Copy-Standard P 🗈		tandard P 🖹	Vendor	213677 DS WATERS OF	AMERICA INC	Doc. date	07/18/2007		
٣) Hea	der								
₽	B	S Item	A I	Material	Short text	PO quantity	OUn C Deliv, date	Net price	Curre Per	OP Matl group P
1		1		<u>144029</u>	WATER, SPRING, 5GAL, PLSTO	200.00	0EA D07/26/20	07	2.35USD 1	EA WATER P
		î 2		144031	COOLER,HOT&COLD WATER	, 12.00	0M0N D 07/26/20	07	2.00USD 1	MON DRINK COOLERP

6. To verify that the committed funds are unencumbered, go to the Environment Menu, Document Item, AC Commitments to view the financial document.

08/03/3	8/03/2007 16:49:34 Commitments: Line Items by Document Number 1													
R	efDocNo	Item	FM pstg d.	Value Type Text	Amt type	Pymt bdgt	Fund	Cost ctr	Cmmt item	Funds ctr				
	300025587 300025587			Purchase orders Purchase orders			103610.000 1.36107000 1036107000			3410102000 3410102000				
**		1					1036107000							
***		1												
	300025587 300025587			Purchase orders Purchase orders			113610,000 1036107000 1036107000 1036107000			3410102000 3410102000				

- The line items are now deleted but will still reside on the Purchase Order in the system. However, they will not be active, and the funds are liquidated from the deleted line items.
- 8. Be sure to provide the supplier with a copy of the "Change Version".