

Small Business Reserve Indicator Validation

The Small Business Reserve Indicator (SBRI) requires the user to select “YES or NO” when Creating or Changing a PO or Contract. A validation (system check) is in place that will prevent the PO and/or Contract from being ordered /released if the indicator does not have a “YES” or “NO” selected. Users will receive an error message if the “Small Business Reserve Indicator” is not selected.

PLEASE NOTE:

1. When a PO is created referencing a contract, the SBRI will default to what is on the contract.
2. With SRM and SAP (R3) Contracts, when an ITQ document type is referenced on the PO, the SBRI will default to “NO.”
3. The SBRI validation is excluded on the following Purchase Order transaction types listed below. (The SBRI field will still be visible, but you will not be prompted to select YES/NO.)
 - a. **SRM:** Emergency PO Types (ZEP, ZEPI, and ZEPO), Sole Source Service and Sole Source Supply POs (ZSBI, ZSDI, ZSSB, and ZSSD), Stock Transport Orders (STOs), and for future reference, when implemented, the Invoicing Plan (ZIP).
 - b. **SAP (R3):** Emergency PO document type (EP), Sole Source Service and Supply POs (SSB, SSBI and SSD), Stock Transport Orders (UB) and Periodic Invoicing Plan (IP).

The SBRI is located on the Header tab on both the Contract and the PO in both SRM and SAP (R3). Examples of each are displayed below:

Location of SBRI on SRM PO (Header>General Data tab):

The screenshot displays the SAP SRM 'Change Purchase Order' interface. The 'Header' tab is selected, and the 'General Data' sub-tab is active. The 'Basic' section is expanded, showing fields for Identification, Organization, and Currency, Values and Pricing. The 'Small Business Reserve' field is highlighted with a red box, showing a dropdown menu with 'Yes' and 'No' options.

Change Purchase Order

Order Save Print Preview Check Close Cancel Related Links

Purchase Order Number: 4300005583 (Change Version) Purchase Order Type: Standard PO Status: In Process Document Date: 10/17/2014 Total Value (Gross): 48.00 USD Smart Number Supplier: JACK WILLIAMS TIRE COMPANY INC1234567890

Overview Header Items Notes and Attachments Approval Tracking

General Data Notes and Attachment Output Document Totals Extended PO History Payment User-Specified Status

Basic

Identification

Smart Number: Local Purchase Order1 P00025
☐ Smart Number is External
☐ New Serial Part for Smart Number

Purchase Order Number: 4300005583
 PO Name:

Corresponding Novation Purchase Order:

Purchase Order Type: Standard PO
 Reason Code:

Organization

Purchasing Organization: COPA Purchasing Organization
 Purchasing Group: DGS Central Purchasing Group [Show Members](#)

Currency, Values and Pricing

Currency: USD
 Total Value (Net): 48.00 USD
 Total Value (Gross): 48.00 USD
 Tax Value: 0.00 USD

Service and Delivery

Commitment Documents: [Display](#)

Status and Statistics

Document Date: 10/17/2014
 * FM Posting Date: 10/17/2014
 * Posting Period: 004
☐ Cancelled
 Closeout Status: None

Validity Start Date: **Validity End Date:**

Replacement PO Indicator: ☐

Original PO Number (Being Replaced):

Small Business Reserve: Yes
 Non Standard Terms & Conditions: No

Location of SBRI on SRM Contract:

Change SW Regular Contract 4400006167

Read Only | Close Release Save Check Lock Print Preview Related Links

Contract Number 4400006167 (Change Version) Smart Number Copy of Contract 4400006166 Contract Type SW Regular Contract Status In Process Supplier 100012 JACK

Overview Header Items Notes and Attachments Conditions Approval Tracking

Basic Data Condition Hierarchy Notes and Attachments Output Document Totals Account Assignment Payment User-Specified Status

Basic

Identification

☐ Smart Number is External

Contract Number: 4400006167

Contract Type: SW Regular Contract

Basic Contract: ☐

Organization

* Purchasing Organization: COPA Purchasing Organization

* Purchasing Group: YS2 - 1500 DGS ROBINSON PGROUP [Show Members](#)

Dates

* Valid From / To: 10/17/2014 - 10/16/2015

Alert Expiration: 0 Day(s)

Non Standard Terms & Conditions: ☐

Currency, Values and Pricing

* Currency: USD

Target Value: 100,000.00 USD

Alert Release Value: 0 %

Release Value: 0.00 USD

Service and Delivery

Under/ Overdelivery Tolerance: 0.00 % / 0.00 %

Status and Statistics

Created On: 10/20/2014

Created By: P00516544

Closeout Status: None

Contract Name: test

Small Business Reserve:

Partner

Details Add Send E-Mail Call Clear

Location of SBRI on SAP (R3) PO:

ZNB SRM Copy-Stan... Vendor 100012 JACK WILLIAMS TIRE C... Doc. date 08/20/2014

Delivery/Invoice Conditions Texts Address Communication Partners Additional Data Org. Data Status Customer Data Payment Processing

Non-Std Terms & Conditions: ☐

Invoice Reference:

Description:

Replacement PO: ☐

Original PO# being replaced:

Small Business Reserve: ☐

Small Business Reserve (1) 3 Entries

Small Business Reserve Short Descript.	
Y	Yes
N	No

Location of SBRI on SAP (R3) Contract:

Display Contract : Header Data

Agreement 4600012726 Company Code COPA Purchasing Group 279
Agreement Type SwV Purch. Organization COPA
Vendor 100022 BILLS FEED TEST

Administrative Fields
Agreement Date 10/16/2014 Item Number Interval 10 Subitem Interv. 1
Validity Start 10/16/2014 Validity End 10/16/2015 Language EN
☐ GR Message

Terms of Delivery and Payment
Payt Terms P001 Targ. Val. 10,000.00 USD
Payment in 30 Days 0.000 % Exch. Rate 1.00000 ☐ Ex.Rate Fx
Payment in 0 Days 0.000 % Incoterms FOB DESTINATION
Payment in 0 Days Net

Reference Data
Quotation Date Quotation
Your Reference Salesperson
Our Reference Telephone
Suppl. Vendor Invoicing Party

☐ Non Std Terms & Conditions

Y Small Business Reserve **Small Business Reserve (1) 3 Entries**

Small Business Reserve	Short Descript.
Y	Yes
N	No