 **Viewpoint**  
Jobpac Connect<sup>™</sup>

Product Vendor Reference System  
User Guide  
Version: 1.0

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## Document Control Table

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## Change History

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1.0	31/3/2022	DMB	Initial Release

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## Overview

The PVRS (Product Vendor Reference System) module facilitates the classification of creditors via definition of a scope of supply and also allows for the creation of product codes which fall within these scopes of supply. Product code prices can be maintained and revised by supplier so that Purchase Orders can be raised with agreed rates. Further definition of suppliers is available; to record 'agencies', general information and reference notes. Product codes may also be linked to a Stores Module stock code, a fixed assets classification or a BMR (Bulk Materials Register) code.

A scope of supply may be used as a classification for supplier and the services they provide e.g. Carpenters, Plumbers, and Electrical or may be used to group product codes into logical units such as Hire Equipment, Concrete, Reo etc. Its usage may be mixed or used only with products or suppliers, or both. The ability to rate and track a supplier's level of service for a given scope of supply may be used so that preferred suppliers are used when placing orders.

*By default this function is mandatory to use when products are setup. However there is a parameter PRSVVL position 1 which can turn off the mandatory requirement for Products. It is not mandatory for Suppliers.*

The main reason for using this module is to be able to establish product codes with good descriptions, and load current prices from suppliers to those codes. These can then be used in the PO module to prepare purchase orders.

Price lists can be uploaded to existing creditors, and new products created by the upload

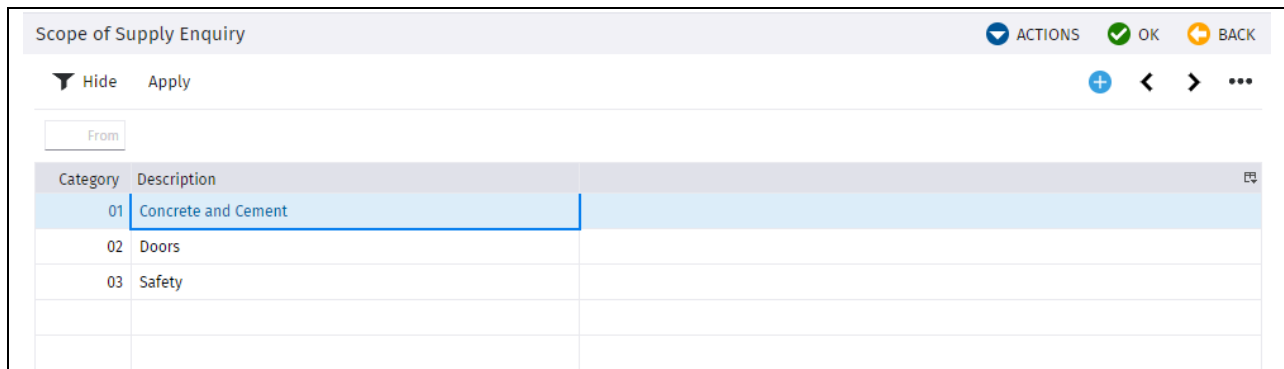
## Scope of Supply

### Set up Scope of Supply

This program allows the user to create a two level classification that may be used to group suppliers and product codes into categories and sub-categories of a scope of supply.

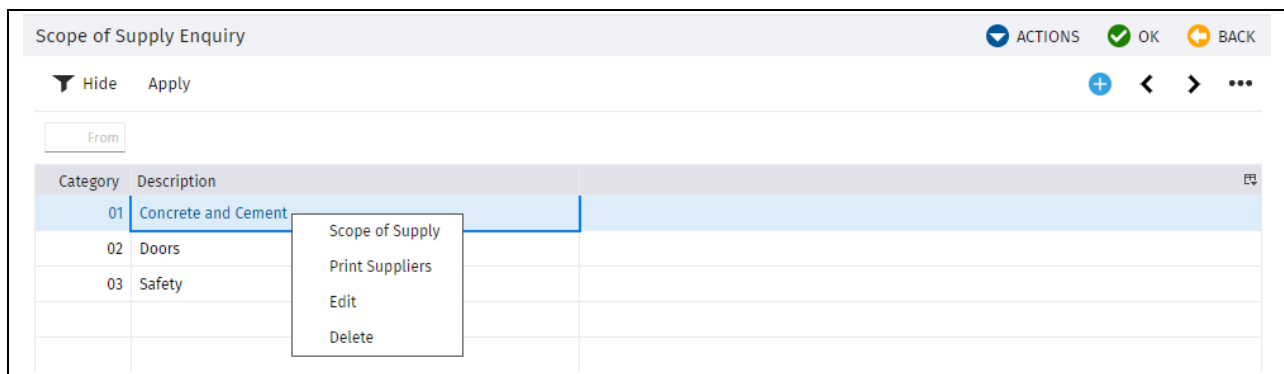
To access Scope of Supply, select

**>Stores Control > Prod Vendor Ref System > Scope of Supply**



To add a new Scope of Supply Category record, select **Add** option from the **Action** menu and a new entry screen will be displayed.

Click on an existing line to display a menu options list where you can select



**Scope of Supply** – Select to maintain scope of supply sub-categories. The following screen will be displayed.

# Product Vendor Reference System

Scope of Supply Enquiry ACTIONS OK BACK

Category 01 Concrete and Cement

Hide Apply + < > ...

SOS	Scope Of Supply	Standard	Inspect Low	Inspect High	Supply No's	
10	Sleepers	N/A	0	0	1	
20	Cement	ISO9002	0	1	2	
30	Concrete	ISO9003	0	1	2	

Click on an existing line to display a menu options list where you can select

**View Suppliers** – View suppliers for this scope of supply. The Supply No's column on the right hand side of the screen indicates the number of suppliers for the scope of supply. (This is described later in this document).

**Print** – Print a report containing a list of suppliers for this scope of supply category

To add a new Scope of Supply record, select **Add** option from the sidebar and a new entry screen will be displayed.

Scope of Supply Maintenance ACTIONS OK BACK

Category 01 Concrete and Cement

Scope of Supply

Quality Standard  Inspection Level : Low  High

< > ...

Comments	

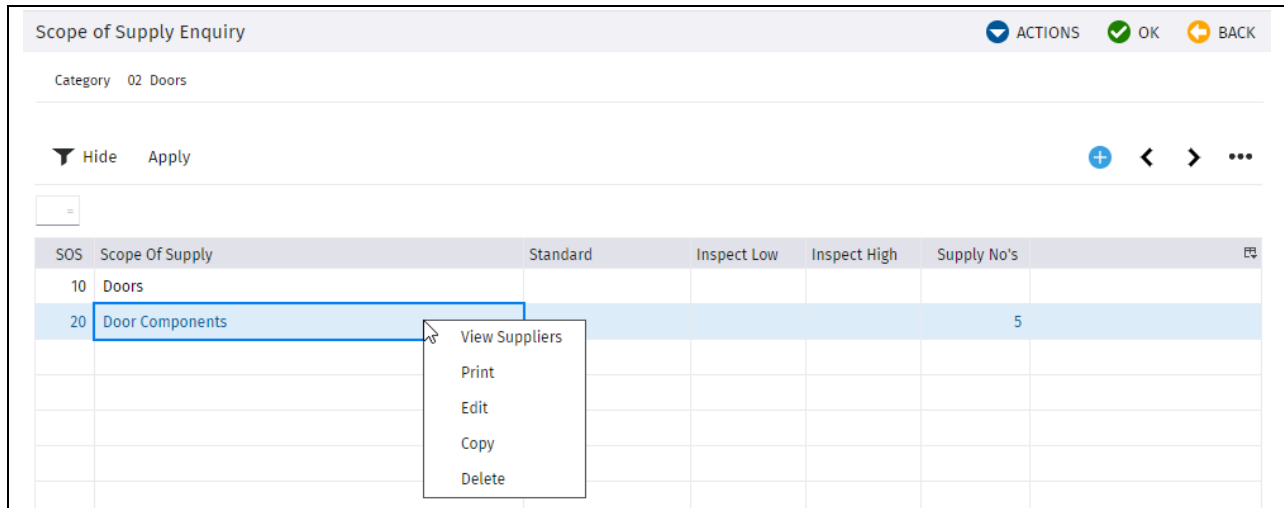
**Scope of Supply Maintenance Screen**

Field Name	Description
Scope of Supply	The next number in sequence will be presented in this field. To change the sequence key a new number. Enter a description for the scope of supply.
Quality Standard	A field to describe the quality standard required for the supply. E.g. ISO9000.
Inspection Level	Enter a number range from 1 to 5 to set the low to high rating acceptable range for this scope of supply. A rating of 5 being the highest quality level.
Comments	An optional narrative to further describe the scope of supply.

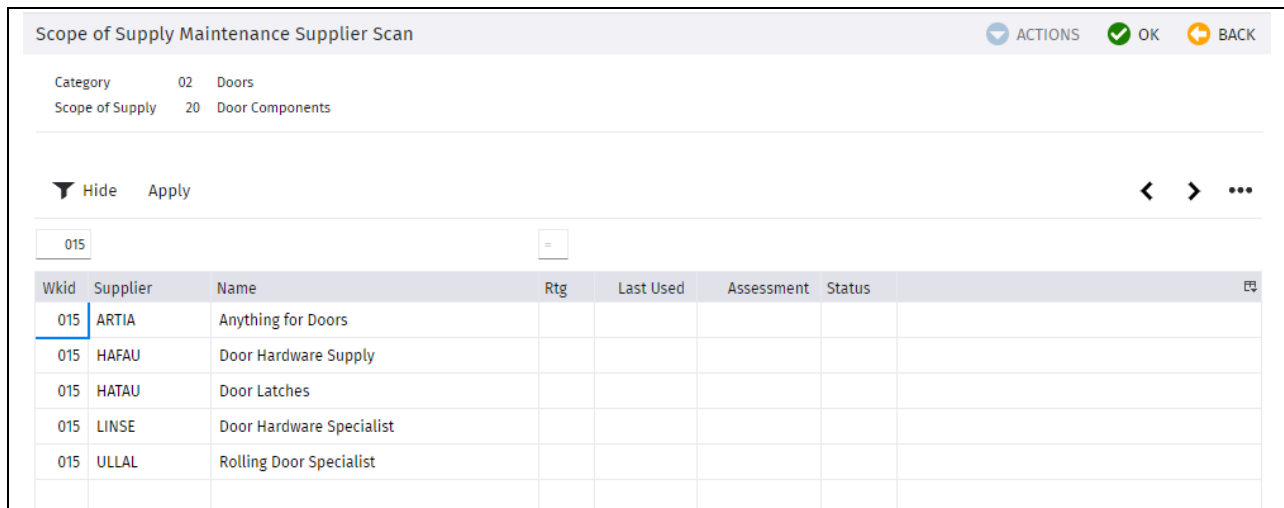
# Product Vendor Reference System

## View Suppliers

The view suppliers' screen is accessed via selection menu on the scope of supply enquiry



Select View Suppliers. It displays the suppliers linked to a scope of supply, their rating, last used and assessment dates and a status.



The following right click options are available:

**Creditor Master** – View the name and address details for the supplier.

**Assessment** – Display the quality assessment enquiry (detailed later in this document)

**Deliveries** – Display the delivery docket enquiry for this supplier

## Supplier Scope of Supply

This program allows the user to assign scope of supply categories to a supplier code and enter quality assessment details.

To access Scope of Supply select > **Stores Control** > **Prod Vendor Ref System** > **Supplier Scope of Supply**

# Product Vendor Reference System

Enter a supplier code to maintain.

A list of scope of supply categories assigned to the supplier is displayed.

To filter the list by status use the check box to select Attached, Held or Cancel status.

To assign a new assessment / scope of supply entry, select **Add Assessment/SOS** from the Actions options and a new entry screen will be displayed.

Field Name	Description
------------	-------------

Category	Enter a scope of supply category and sub-category.
Quality System	Check the box if a quality system is in use for this supplier.
Quality Standard	Enter the quality standard for the supplier if a quality system is in use.
Internal Initial By	Enter the name of the person responsible internally for the initial supplier assessment.
Date	The date of the assessment and a rating.



# Product Vendor Reference System

Field Name	Description
Rtg. (Rating)	The rating is on a scale from 1 to 5, with 5 being the highest quality rating.
Internal Latest By	Enter the name of the person responsible internally for the latest supplier assessment.
Date	The date of the assessment and a rating.
Rtg. (Rating)	The rating is on a scale from 1 to 5, with 5 being the highest quality rating.
2 <sup>nd</sup> Party Approval By	If a second party approval is required, enter the name of the individual or organisation.
Date	The date of approval
Certification By	Enter the name of the organisation responsible for certification.
Date	The date of the certification
Comments	Enter any additional comments that may be of use to further describe the assessment.

Press OK to update and add a new entry.

To select an existing entry, double click on a line or select the line and press the right mouse button and take **Select** from the menu.

For scope of supplies that are currently not held or cancelled, the following options will appear in the sidebar.

**Delete** - Cancel the existing scope of supply.

**Hold** – Suspend an existing scope of supply.

A confirmation message will be displayed. If **OK** is selected, then additional details will be displayed on the screen.

The S.O.S Held or Cancelled by will be populated with the current user logged into Jobpac and today's date – depending on the respective option taken. You must enter a reason code for the cancellation.

To remove a Cancellation or Held status, select the record for edit and clear the Held or Cancelled by fields to revert to 'attached' (or active) status.

## Product/Service Code Maintenance

This program allows the user to create product/service codes, link them to a bulk materials register (BMR) or asset classification, link to a stores stock code and to assign a scope of supply category. These Product/Service codes can be linked to suppliers, and prices associated with them. They can then be used in Purchasing when raising purchase orders to establish the current rate for these products.

To create or modify product codes select

**Stores Control > Prod Vendor Ref System > Product/Services Maint**

A full screen editable list of all product codes will be displayed.

Product/Service Code Maintenance						▼ ACTIONS	✓ OK	← BACK
<input type="text"/> From <input type="text"/> To		Contains	<input type="text"/> From <input type="text"/> To	<input type="text"/> Frr <input type="text"/> To	<input type="text"/> Frm <input type="text"/> To	<input type="text"/> From <input type="text"/> To		
Product Code	Description	Register Type	S Supply Grp	S Supply D	D Set			
CM004523	SAND & CEMENT - 20KG BAG		1	20				
CM004544	CEMENT - 20KG BAG		1	20				
DR-COMP-CAT-01	Door/Cupboard Catch Plastic White		2	20				
DR-COMP-CAT-02	Magnetic Catch Single		2	20				
DR-COMP-CAT-03	Pivot Sliding Pocket Door 536mm (Set)		2	20				
DR-COMP-CAT-04	Push Magnetic Catch 40mm (Grey)		2	20				
DR-COMP-CAT-05	Push to Open Catch K-Push Long with Buffer (Anthracite)		2	20				
DR-COMP-CAT-06	Push to Open Catch K-Push White with Bumper (Long)		2	20				
DR-COMP-CAT-07	Push to Open Catch with Mount (Grey)		2	20				
DR-COMP-LAT-08	Child Safety Latch		2	20				
DR-COMP-ROL-09	Door Roller WVG300		2	20				
DR-COMP-SET-10	Door Straightener Set (planofit)		2	20				
QS043655	QUIKCRETE - CONCRETE 20KG BAG		1	30				
QS044554	QUIKCRETE - CEMENT 20KG BAG		1	30				

Field Name	Description
Product Code	A sixteen character alphanumeric code used for a product or service.
Description	Enter or update a description for the product, up to 60 Characters.
Register Type	If the product code is related to a Register (BMR) type then enter a valid Register code.
Supply	Scope of supply category and sub-category code must be entered for each product code, unless the parameter PRSVVL position 1 is set to Y.
DSet	Document Set is an optional code to link the product code to a code that may contain details about the particular product, such as technical specifications and the like.

# Product Vendor Reference System

To create new product code, select **Add** from the **Actions** Menu and a new entry screen will be displayed. The description and fields are exactly as described above with the exception of the ability to key into a product field to create a new code.

Click on an existing product code line to display a menu options list where you can select

**Product Details** – Enter and edit additional product details.

Field Name	Description
BMR Type	If the product code is linked to a Register type, enter it here. This is the same Register Code that is available for entry on the main screen. This is an optional entry.
Default Cost Centre	This is used by Purchase Order entry to default the cost centre allocation when costing to a project for order items raised using this product code. This is an optional entry. This cost centre is validated against cost centres held in a template job. This job number is nominated in the parameter CHKCCT position 2.
Asset Valid Classification	If a product code is not assigned to a Register Type, it may be defined to a valid Fixed Assets Classification. This is an optional field and has no usage in the system at present other than for the purposes of offline analysis using tools such as Excel and BI (Business Intelligence).

## Link to Stock Code

**Copy** – Copy a product code. The attributes of the selected line will be copied and displayed in a window so that minimal user entry is required to create a new product code. Description of field usage is the same as described earlier in this document.

# Product Vendor Reference System

**Full Description** - A detailed narrative can be entered to further describe a product code. If entered, this detailed description will be printed under the product order item line on Purchase Orders

The screenshot shows a web interface for entering product descriptions. At the top right, there are three buttons: 'ACTIONS' (down arrow), 'OK' (green checkmark), and 'BACK' (orange arrow). Below this, the 'Product Code' is 'DR-COMP-CAT-06'. The 'Description' field is a multi-line text area containing the text 'Push to Open Catch K-Push White with Bumper (Long)'. There are several empty lines below the first line of the description field.

There are two parameter that can assist is bringing the full description from the Product Code through to a purchase order item.  
PRDSCN and POMNT positions 2, 11, 20.

## Supplier Product/Services Reference Maintenance

This program allows the user to define general contact information for a supplier, assign supplier product codes and pricing information, define any agencies they may have and enter reference notes to capture additional information.

To access Scope of Supply select

**> Procurement > Prod Vendor Ref System > Supp Prod/Serv Ref Maint**

This displays the list of products for that supplier with pricing information

# Product Vendor Reference System

**Products/Services Tab**– This function allows the user to link product codes to a supplier and maintain unit of measure and price details.

Supplier-Product Reference Maintenance : Supplier Details 
[ACTIONS](#) [OK](#) [BACK](#)

Supplier: HY002      Cement Products

Address:

Suburb:       Post Code:

Country:       Phone:

Approved Supplier      Fax:

GENERAL INFORMATION    **PRODUCT/SERVICES**    AGENCIES    REFERENCE NOTES    SUPPLIER PRODUCT CODE

Hide    Apply + < > ...

Product Code	Description	Wkid	Job Grp	Job	Unit	Price	SOS Cat	Sos Acc	Nat	Rating	Assessment Date	Effective Date
CM004523	SAND & CEMENT - 20KG BAG	15			BAG	7.35	01	020				
CM004523	SAND & CEMENT - 20KG BAG	15			BAG	7.65	01	020				17/03/2022
CM004544	CEMENT - 20KG BAG	15			BAG	6.24	01	020				
CM004544	CEMENT - 20KG BAG	15			BAG	7.00	01	020				17/05/2022
QS043655	QUIKCRETE - CONCRETE 20...	15			BAG	6.95	01	030				
QS043655	QUIKCRETE - CONCRETE 20...	15			BAG	7.00	01	030				17/05/2022
QS044554	QUIKCRETE - CEMENT 20KG...	15			BAG	6.80	01	030				

Field Name	Description
Product Code	A sixteen character alphanumeric code used for a product or service.
Description	Product description from the product master file.
WKID	Workid of Job
Job Group	Pricing can be set for a Job Group
Job	Pricing can be set for a Job
Unit	Unit of Measure. Can be modified here
Price	The agreed purchase price for the product.
SOS Cat	Scope of Supply Category
SOS Sub Cat	Scope of Supply Sub Category
Nat	
Rating	The last rating for the supplier for the product's scope of supply.
Assessment Date	The last rating assessment date for the supplier scope of supply
Effective Date	Date this price kicks in. Used in PO Creation, and compared with PO date

# Product Vendor Reference System

**General Information** – Allows the capture of address information and contacts specific to the PVRS, rather than accounts, side of a business.

Supplier-Product Reference Maintenance : Supplier Details 
[ACTIONS](#) [OK](#) [BACK](#)

Supplier: HY002      Cement Products

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Address:

Suburb:       Post Code:

Country:       Phone:

Approved Supplier      Fax:

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**GENERAL INFORMATION**    PRODUCT/SERVICES    AGENCIES    REFERENCE NOTES

Contacts      Position

1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>

Dates -  
Workshop Audit:        Rating Reviewed:

Field Name	Description
Address	Enter a contact address, suburb, post code and country. This defaults to the address held on the creditor master file, but if changed, is stored separately in the PVRS system
Phone/Fax	Enter a contact phone or fax number. The default is the value held in the creditor master file, but if changed, is stored separately in the PVRS system.
Approved Supplier	Check the box if this is an approved supplier.
Contacts and Position 1 - 4	Enter up to four contact names and their respective positions within the organisation.
Workshop Audit	Enter the date when the last workshop audit took place.
Rating Reviewed	Enter the date when the last supplier rating was reviewed.

A new product code can be entered using the **Add New Product** option in the **Actions** menu. The other tabs allow entry of Administration information for the suppliers

## Change Price Option

This allows a new price to be entered with a new effective date

# Product Vendor Reference System

Supplier-Product Reference Maintenance : Supplier Details

Supplier HY002 Cement Products

Address [ ] [ ]  
Suburb [ ] Post Code [ ]  
Country [ ] Phone [ ]  
 Approved Supplier Fax [ ]

GENERAL INFORMATION **PRODUCT/SERVICES** AGENCIES REFERENCE NOTES SUPPLIER PRODUCT CODE

Hide Apply

From [ ] Contains [ ] From [ ] From [ ] From [ ] From [ ] From [ ] From [ ] = [ ] = [ ] From [ ] From [ ]  
To [ ] To [ ] To [ ] To [ ] To [ ] To [ ] To [ ] To [ ] To [ ]

Product Code	Description	Wkid	Job Grp	Job	Unit	Price	SOS Cat	Sos Acc	Nat	Rating	Assessment Date	Effective Date
CM004523	SAND & CEMENT - 20KG BAG	15			BAG	7.35	01	020				
CM004523	SAND & CEMENT - 20KG BAG	15			BAG	7.35	01	020				17/03/2022
CM004544	CEMENT - 20KG BAG	15			BAG							
CM004544	CEMENT - 20KG BAG	15			BAG							17/05/2022
QS043655	QUIKCRETE - CONCRETE 20...	15			BAG							
QS043655	QUIKCRETE - CONCRETE 20...	15			BAG							17/05/2022
QS044554	QUIKCRETE - CEMENT 20KG...	15			BAG							

Select  
Change Price  
Full Description  
Full Supplier Product Code  
Delete

## Price Changes Maintenance

This program allows the user to maintain a set of price change instructions ahead of time, to be applied via the apply price change update function. Price changes may be entered at scope of supply level as a percentage, or down to individual product codes as a dollar value or percentage change.

To access Scope of Supply select

> Stores Control > Prod Vendor Ref System > Price Changes Maint

Enter a credit code.

Creditor Product/Services Price Maintenance

Creditor HY002 Cement Products

Hide Apply

Contains [ ] = [ ] = [ ] Contains [ ] From [ ]

Effective Date	Cat Group	Cat Det	Product Code	Description	New Price	Increase %	Appl
31/05/2022	1	20				10.00	N
31/05/2022	1	30				8.00	N

A list of existing price changes will be displayed. A new price change record can be entered using the fields located at the top of the screen. Existing price changes may have their price or % increase modified by placing the cursor on the field and keying over the existing entry. The following options are available by selecting a line and pressing the right mouse button to display a selection menu containing:

# Product Vendor Reference System

Field Name	Description
Effective Date	Enter the date from which the price change becomes effective. Changes will not be applied unless this date is selected in the apply updates function.
Category	Enter the scope of supply code for the price change
Product Code	If the price change applies to a specific product code, rather than a many products within a scope of supply, then enter a product code.
Description	The description for the product code from the product code master file, where entered.
New Price	If the price change applies to an individual product code, then enter the new price here.
Increase %	Enter the percentage increase (or decrease using a negative) to apply.
Appl	This contains a value of Y)es or N)o depending on whether the price change has been applied via the update program.

A subset or list filter is available from the **Actions** menu to restrict the records displayed. This is simply a filter

**Subset** – Enter a date range, category range or product code range to filter the list on the main screen. Press OK to accept your selections. If you do not know the category or product codes, then press ► to display a list for selection.

**Subset List** ×

Start Date	<input type="text"/>		
Finish Date	<input type="text"/>		
Start Category	<input type="text" value="00"/>		
Finish Category	<input type="text" value="99"/>	<input type="text" value="999"/>	
Start Product	<input type="text"/>		
Finish Product	<input type="text"/>		

JP530PGM\_PRSVPRMN\_SCRN03\_AW005193

## Apply Price Changes

This program allows the user to apply the price changes entered in the Price Change maintenance program. It may be run in enquiry or update mode and will update all prices in the PVRS system and also any enquiry Purchase Orders that meet the selection criteria. Two



# Product Vendor Reference System

reports will be produced: one outlining the changes made to the PVRS system, the other to those Enquiry Purchase Orders relating to order items that contain a product code affected by the price change.

To access Scope of Supply select > **Stores Control > Prod Vendor Ref System > Supp Prod/Apply Price Changes**

Apply Product/Services Price Changes
⌵ ACTIONS

Start Creditor

Finish Creditor

Date Up To

Start Category

Finish Category

Start Product

Finish Product

Select option  Print Report  Update Masterfile  Both

Report Option  PDF  Excel

View the report

### *Apply Price Changes*

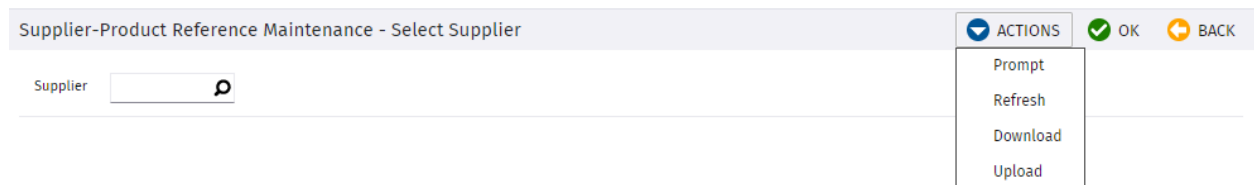
Field Name	Description
From and to Creditor	Enter a range of creditors for inclusion in the update.
Date up to	Select effective dates up to and including this date in the price update.
From and to Category	Enter a range of scope of supply codes.
From and to Product Code	Enter a range of scope of product codes.
Select Option	'Print Report' runs the price change in preview mode only. No updates will occur. 'Update Masterfile' runs the price change but does not produce a report. Selecting the 'Both' option will action an update and report.

# Product Vendor Reference System

## Uploading Products/Suppliers and Price Lists

The upload available in the Data upload menu item in System Admin called SUPPPROD can be used to upload new products and update existing products with price changes.

A download with the same format as the upload spreadsheet is available within the Supplier Products Ref Maint screen.



At the time of writing, this upload is undergoing some improvements, but the current version works.

The revised upload template looks like this. The yellow columns are the changes. The Green column will be removed from the existing template. This upload can be used to create or modify existing data.

If the product code does not exist it will be created, if it does exist it will be updated. SOS Category and Sub-Category are mandatory unless parameter PRSVLL turns them off.

Supplier Product Details Upload				SUPPPROD						
Work Id 3.0 N	Product 16 A	Product Short Description 30 A	Product Full Description 540 A	Register Type 10 A	SOS Category 2.0 N	SOS Subcategory 3.0 N	Documentation Set 4 A	Creditor 8 A	Supplier Product Code 60 A	
Costing Work Id 3.0 N	Job Group 2 A	Job 6 A	UOM 5 A	Product Price 15.4 N	Effective Date YYYY-MM-DD	Reference Notes 540 A	Default Cost Code 8 A	Default Cost Type 8 A	Link to Stock Code 15 A	Rate Type 2A

## Enquiries

### Product/Services Enquiry

This program allows the user to enquire on the list of product codes with a link to the Supplier Product Services Enquiry available.

### Supplier Product/Services Reference Enquiry

This program allows the user to enquire on the list of Suppliers with a link to the Products for that supplier.

## Reporting

### Approved Suppliers List

This report provides a list of Approved Suppliers including their code, name, post code, country and workshop rating dates.

### Product/Services List

This report provides a list of Product/Service codes including their description, product type, scope of supply and document set.

### Qualified Suppliers List

This report provides a list of Approved Suppliers listed in either detail or summary in either Scope of Supply or Supplier code sequence. The report includes Supplier code and name, Scope of Supply codes and description, Suburb, Contact Number, Rating and Assessment date.