

Procurement Depository User Documentation

Lines of Business for Public Bodies

The Line(s) of Business (“LoB”) that a Public Body can access or is interested in can be created in this section. A Line of Business refers to any goods, works and services available to the Public Body. Public Bodies can create as many Lines of Business that they require as well as View/Delete existing Lines of Business. Additionally, Public Bodies can pre-qualify Suppliers and Contractors in those Lines of Businesses. Public Bodies must specify a Value Category for each Line of Business.

1.0 How to Add a Line of Business

As a Public Body, you will be presented with the United Nations Standard Products and Services Code (“UNSPSC”) to select the goods, works, and services in which you are interested. Each Line of Business consists of four (4) levels. You must navigate the hierarchy until you reach the 4th level, which is referred to as the Commodity. At the Commodity level, you will be able to select one or as many items as needed, then proceed to saving that information along with a Value Category and other information.

Step 1. Click on Lines of Business

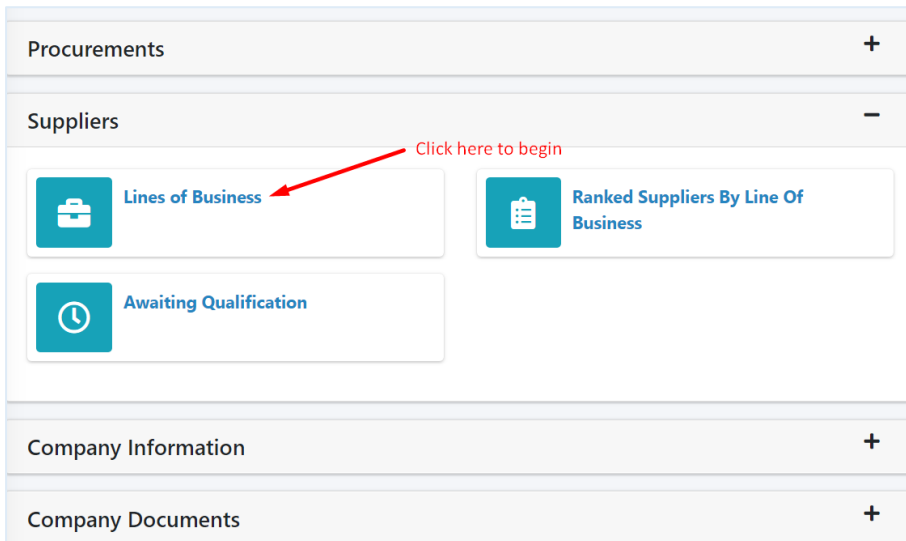


Figure 1.0 Create Line of Business

Step 2. Click on Create

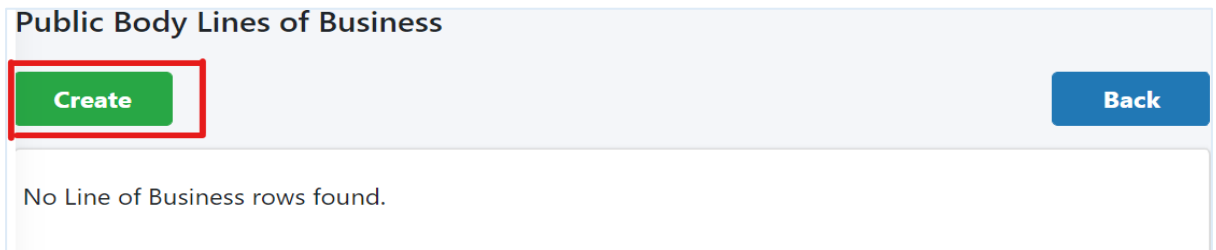


Figure 1.1 Create Line of Business

Step 3. Traverse UNSPSC Listing starting at the 1st Level through to 4th Level to select the Line of Business desired.

1st Level (Segment)



Figure 1.2 Line of Business – Level 1 select the segment

2nd Level (Family)

Create New Line of Business

Home / Financial and Insurance Services

+ 84100000 - Development finance
+ 84110000 - Accounting and bookkeeping services

Next Back to Top Cancel

Please select at least one Line of Business before proceeding.
Selected Items

Figure 1.3 Line of Business – Level 2 select the family

3rd Level (Class)

Create New Line of Business

Home / Financial and Insurance Services / Accounting and bookkeeping services

+ 84111500 - Accounting services

Next Back to Top Cancel

Please select at least one Line of Business before proceeding.
Selected Items

Figure 1.4 Line of Business – Level 3 select the class

4th Level (Commodity)

Create New Line of Business

Home / Financial and Insurance Services / Accounting and bookkeeping services / Audit services

84111601 - Year end audits
 84111602 - Quarterly reviews
 84111603 - Internal audits

Next Back to Top Cancel

Please select at least one Line of Business before proceeding.
Selected Items

Figure 1.5 Line of Business – Level 4 select line (s) of Business

Step 4. Select and Click Next

The screenshot shows a web form titled "Create New Line of Business". At the top right, there are three buttons: "Next" (blue), "Back to Top" (teal), and "Cancel" (yellow). A red box highlights the "Next" button, with a red arrow labeled "3" pointing to it. Below the buttons is a breadcrumb trail: "Home / Financial and Insurance Services / Accounting and bookkeeping services / Audit services". A message reads: "Please select at least one Line of Business before proceeding." Below this, there are three selection options, each in a red box: "84111601 - Year end audits" (checked), "84111602 - Quarterly reviews" (unchecked), and "84111603 - Internal audits" (checked). A red arrow labeled "1" points to the first option, and another red arrow labeled "2" points to a "Selected Items" box on the right. This box contains a list: "Selected Items" followed by "• Year end audits" and "• Internal audits".

Figure 1.6 Line of Business -Level 4 Breakdown

1. Select the goods or services to be added
2. The options selected appear to the right
3. Click on the Next Button to proceed

Step 5. Select Pre-Qualification Value Category

The screenshot shows the "Create New Line of Business" form with the following fields: "Pre-Qualification Value Category *" is a dropdown menu set to "LEVEL 2 (\$100,000.01 - \$2,000,000.00)"; "Effective Date *" is a date picker set to "01-October-2015"; and "Expiry Date" is an empty date picker. Below these fields is a section titled "Selected Lines of Businesses" containing a list: "• Year end audits". At the bottom left, there are two buttons: "Save" (blue) and "Cancel" (yellow).

Figure 1.7 Save Line of Business

Pre-Qualification Value Category

You must specify the value category range for the selected Line(s) of Business required by your Public Body. In addition, you will be able to pre-qualify Suppliers and Contractors for this combination of value category and Line of Business.

Selection of a value category automatically includes all value categories up to and including that level. For instance, if Level 3 is selected, you will be able to pre-qualify Suppliers and Contractors of that selected value category as well as all preceding value categories, e.g. if Level 3 is selected, you will be able to pre-qualify suppliers with value categories of Level 3, Level 2, and Level 1.

There are six (6) value categories from which to select:

1. LEVEL 1 (\$0 - \$100,000.00)
2. LEVEL 2 (\$100,000.01 - \$2,000,000.00)
3. LEVEL 3 (\$2,000,000.01 - \$10,000,000.00)
4. LEVEL 4 (\$10,000,000.01 - \$50,000,000.00)
5. LEVEL 5 (\$50,000,000.01 - \$100,000,000.00)
6. LEVEL 6 (>\$100,000,000.00)

All values are expressed in Trinidad and Tobago Dollars (TTD) and are exclusive of Value Added Tax ("VAT").

Effective Date

The first working day of the year should be selected here, e.g. 02-January-2021.

Expiry Date

This field can remain blank.

Click on the Save button to add the Selected Lines of Business or click Cancel button if you wish to return to the UNSPSC listing.

2.0 How to View/Delete a Line of Business

On the Line of Business page, you will have the option to View and Delete any Line of Business should you wish to do so. Upon clicking the Delete button, you will be prompted with a warning. Should you wish to proceed, you can then click on the Delete button to confirm your selection.

Step 1. Click Delete

The screenshot shows the 'Public Body Lines of Business' interface. At the top left is a green 'Create' button and at the top right is a blue 'Back' button. Below these are two service cards. The first card, 'Cost accounting service', has a 'View | Delete' link highlighted with a red box. Below the card title are three status items: 'Pre-Qualification Category: LEVEL 3 (\$2,000,000.01 - \$10,000,000.00)', 'Threshold Value: 10,000,000.00', and 'Status: NORMAL PUBLIC BODY change'. At the bottom of the card are two buttons: 'Ranked Suppliers' and 'Pending Suppliers'. The second card, 'Financial accounting service', has a 'View | Delete' link. Below its title are three status items: 'Pre-Qualification Category: LEVEL 2 (\$100,000.01 - \$2,000,000.00)', 'Threshold Value: 2,000,000.00', and 'Status: NORMAL PUBLIC BODY change'. At the bottom of this card are also 'Ranked Suppliers' and 'Pending Suppliers' buttons. On the right side of the page is a sidebar with a logo of a classical building, the text 'PUBLIC BODY TEST', 'MINISTRY, DEPARTMENT OR DIVISION OF MINISTRY', and sections for 'Reports To:' and 'Addresses'.

Figure 1.8 Save Line of Business

Step 2. Warning

The screenshot shows a yellow warning dialog box with a warning icon and the text: 'This action cannot be un-done - the data would be permanently deleted. Are you sure you wish to continue?'. Below the dialog box is the title 'Delete Public Body Line of Business'. Underneath the title is a form field labeled 'Line Of Business Code' with the value '84111501'. There is also a small 'Rectangular Snip' watermark on the dialog box.

Figure 1.9 Save Line of Business

Step 3. Proceed to Delete

Modified By

Modified Timestamp

Confirm Delete **Cancel**

Figure 1.10 Save Line of Business