TERRA CAT

29 JUNE 2020

CUSTOMER DATA STANDARDS

Equipment

Customer Data Standards

TC-CDS-Equipment-1.1

Equipment

Data owners:

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Review:

Rental, Power Systems, Sales, Parts & Service reps, OLGA Coordinator

e.g. CSAMs, ISRs, TAMs

Update:

CSC, ISRs, Equipment, Connective Services

Not for: Credit controllers

Contents

Customer Data Standards: Equipment

Document History

Document information

Current Version	1.1
Release Date	19 June 2020
Document Owner	Jessica Macfarlane

Document amendment history

Version	First Release	Sections(a) Amended	Summary of Amendment

Customer Data Standards: Equipment

Business Rules: Equipment
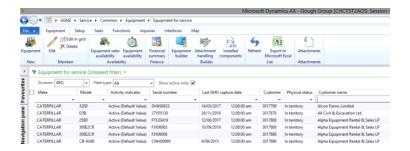
Rule 1	The Business ERP (NAXT) must be the "One Source of Truth" for Customer Equipment across the Business
Rule 2	Any Business application containing Customer Equipment must be consistent with NAXT, primarily CRM (SalesLink)
Rule 3	Accurate Equipment Population is imperative; all Equipment add, delete, ownership change, or update requests must be submitted through SalesLink; Equipment additions from Service will follow the NAXT Equipment workflow process
Rule 4	Equipment records in NAXT must only be updated by: - Sales Administrators / Coordinators - New, Used and Rental Machine sales - Nominated Marketing Gatekeepers - All other additions, deletions, and updates to Customer Owned fleet (Population)
Rule 5	All users requesting for Equipment additions must first check in SalesLink if the Equipment already exists; This also applies to users authorised to create records in NAXT - system must flag duplicate records before creation
Rule 6	All required inputs must be made mandatory in NAXT and must be complete and valid

Customer Data Standards: Equipment

Rule 7	All Equipment must be setup against the Country and Site account of where it is operating
Rule 8	If the Equipment is sold on an account (e.g. Head Office) that differs to the actual location, it must be transferred to the country and site account of where it is physically operating post Sale
Rule 9	Equipment serial numbers in NAXT must be unique and must align with SIMSi
Rule 10	Equipment reference data must be complete, accurate, and centrally controlled - updated as per NPI process for Caterpillar make
Rule 11	Equipment divisions must be aligned to the Terra Cat Product Division structure
Rule 12	Competitive Equipment: All non-CAT makes including lost sale records in CRM must be captured in the Customers Equipment population in NAXT
Rule 13	All Equipment with Fleet Type = Customer or Competitor and with no Customer assigned must be made Inactive until the Ownership is determined
Rule 14	Equipment being parked by the Customer for an indefinite period must be flagged as "Parked" and updated to "Active" when working again
Rule 15	Equipment usage in NAXT must capture SMU readings from all relevant business applications (e.g.

	Vision Link, Oil Commander, VIMS) including manual entries
Rule 16	Out of Territory and Scrapped Equipment must be made Inactive in NAXT
Rule 17	NAXT user access levels and system functionality must be in accordance with established Business rules
Rule 18	Data Owners must ensure Business rules and Data standards developed are adhered to and ongoing data errors identified are actioned in line with established Business procedures
Rule 19	Nominated SMEs must ensure Business rules and Data standards developed are feasible across all impacted Business areas and work with Data Owners on change management
Rule 20	Any changes and exceptions to these rules must be approved by the Data Standards Owner

Customer Data Standards: Equipment

Navigation

GGNZ > Service > Common > Equipment > Equipment for Service

Customer Data Standards: Equipment

Customer Data Standards: Equipment

General

Field	Mandatory	Data Standard
Equipment Number	Y	System generated - Unique identification
Equipment Name	N	Check SISWEB for correct name. For non-Cat default to Product family based on Model selection
Description	N	
Fleet Type	Y	Process driven; Customer - CAT Equipment sold by TC, Competitive - Cat Equipment sold by others, Rental - Rental Fleet, Component if it's an engine or genset
Agreement Status	N	Process driven; Sold - all owned Equipment in population
Physical Status	Y	Used by OLGA. If scrapped select Inactive in territory. If exported select Out of territory
Reason Code	N	If Out of territory choose either TEMPEX for temporarily exported or EXPORT for permanently exported, otherwise select another code from the list. Select SCRAP if machine is scrapped If CANCEL is chosen, also tick Exclude from OLGA tickbox
Project ID	N	

EQ032545 : 320D Medium Excavator

General

Identification

Equipment number: EQ032545

Further identification

Equipment name: 320D Medium Excavator

Search name: 320D Medium Excavato

Description:

Groups

Equipment group: CONSTRUCT

Status

Fleet type: Competitive

Agreement status: Available

Physical status: In territory

Reason code: STATUS

Project ID:

Customer Data Standards: Equipment

General > Machine information, Inventory

Field	Mandatory	Data Standard
Model	Y	If not found, sales admin to add. Ensure correct selection is made to avoid issues later with duplicates or workarounds.
Group Code	N	This populates when a model is selected.
Make	Y	Populates automatically if Model is selected.
Make's own code	Y	Two letter code. Does not have to be unique, but must be populated
CAT Make	Y	Only required for Make Caterpillar, otherwise must not be ticked
Require SIMS ticket	Y	Only required for Make Caterpillar, otherwise must not be ticked
VisionLink / Basic Daily make code	N	
Attachment	N	Tick the box if equipment is an attachment
Attached to	N	Select if needed
Item Number	Y	Mandatory for purchased equipment. Sales admin to add initial records.
Serial Number	Y	Must be capital letters. If not found or equipment is being purchased, update later. (It's only posslbe to leave blank if creating equip from a PO)
Configuration	N	

Customer Data Standards: Equipment

Machine information

Config Id:		
Model:	320D	320D Medium Excavator
Group code:	HEXMD	Medium Excavators	TEX
Make:	CATERPILLAR	Caterpillar
Primary Compatibility Code:		
Attachment:	☐	
Attached to:		
Vehicle for service:	☐	

Inventory

Item number:	
Serial number:	DHK00833
Configuration:	
Plate:	

Machine models (1 - ggnz)

File | New | Delete | Attachment validity rules | Warranty sales information

Model	Description
320D	320D Medium Excav
320D FM GF	320D FM GF Forestr
320D FM LL	320D FM LL Forestr
320D GF	320D GF Forestry Pr
320D L	320D L Medium Exc
320D LRR	320D LRR Medium
320D LRR2	320D LRR2 Medium
320D RR	320D RR Medium E
320D RR2	320D RR2 Medium
321B CR	321B CR Medium E
321B L	321B L Medium Exc
321C LCR	321C LCR Medium
322A	322A Medium Exca
322A L	322A L Medium Exc
322B	322B Medium Excav
322B L	322B L Medium Exc

Identification of the machine manufacturer

Model: 320D
Description: 320D Medium Excavator

◢ **General**

Machine make
Make: CATERPILLAR | Caterpillar

Machine group code
Group code: HEXMD | Medium Excavators | TEX

▷ Insurance
▷ Miscellaneous

Machine makes ( ) - Make: CATER

File | New | Delete

Machine makes ( ) - Make: CATER

Make	Name	Source of supply	Make's own code	VisionLink / Basic Daily make cod	CAT Make	Require SIMS ticket	CAT
CATERPILLAR	Caterpillar		AA	CAT	☑	☑	CAT
CESCO	Cesco		CS		☐	☐	
CHALLENGER	Challenger		CH		☐	☐	CG3
CHAMPION	Champion		RC		☐	☐	CHA
CLAAS	Claas		CL		☐	☐	CKM
CLARK	Clark		BA		☐	☐	C07
COMPONENT	Component		CO		☐	☐	
CONVEYANCER	Conveyancer		CV		☐	☐	
CORMACH	Cormach		CM		☐	☐	
CROWN	Crown		CW		☐	☐	C38
CUMMINS	Cummins		CU		☐	☐	CUM
DAEWOO	Daewoo		DW		☐	☐	DAE
DAF	Daf		DA		☐	☐	D10
DAVID TAYLOR	David Taylor		DT		☐	☐	
DETROIT	Detroit		DI		☐	☐	DET

Right click > View details on Make to open Machine makes form

Customer Data Standards: Equipment

General > Dates

Field	Mandatory	Data Standard
Order Date	N	Process driven
Manufacture Date	N	
Received Date	N	Process driven
Delivery Date	N	Process driven
Sell Date	N	Process driven

Currency

Currency: NZD

Dates

Order date:

Manufacture date:

Estimated receipt date:

Received date:

Delivery date:

Sell date:

Startup date:

Other information

UCC import: ☐

Customer Data Standards: Equipment

Technical information

Field	Mandatory	Data Standard
External Reference	N	
Customer Equipment Number	N	
Inactive	N	Tick the box for equipment that has been traded in, for service vehicles that have been returned, or for aged equipment that has been validated as inactive and investigation is also added to attachment notes.
Stolen	N	
Lost	N	
Missing	N	
Damaged	N	
PIN/VIN Code	N	
Manufacture Year	Y	Check SIMSi, if unknown, use 9999
PWC Code	Y	Select from the list
Exclude from OLGA	N	Mandatory decision - Tick the box if the equipment belongs to a business unit other than Terra (e.g. Palfinger). Leave unticked for Terra customers' competitors e.g. Komatsu, Hitachi etc
Application Code	N	Used by OLGA - for Cat engines only - particularly important for standby engines.
Activity Indicator	N	

Customer Data Standards: Equipment

◢ Technical information

References

External reference:

Customer equipment number:

Machine

Arrangement number:	2403799
Inactive:	☐
Stolen:	☐
Lost:	☐
Missing:	☐
Damaged:	☐
PIN / VIN code:	
Tag number:	
Decal number:	
Manufacture year:	2006
Chassis number:	
Vessel name:	
CFM/PSI:	
ESO:	

OLGA

Remanufactured:	☐	
PWC Code:	720	EQ10
Application code:		
Exclude from OLGA:	☐	
Activity indicator:	Active (Default Value)	

Customer Data Standards: Equipment

Technical information > Engine

Field	Mandatory	Data Standard
Engine Model	N	This is helpful to work out what parts are needed for a repair
Engine Arrangement Number	N	
Engine Serial no	N	
Motor Manufacturer	N	

Customer Data Standards: Equipment

Engine

Engine model:	3066
Engine arrangement number:	2870084
Engine serial number:	MAE15516
Motor manufacturer:	CATERPILLAR

Customer Data Standards: Equipment

Usage information

Field	Mandatory	Data Standard
Estimated Period Usage	N	Enter if known
Number of Periods	Y	Enter '1'
Period Type	Y	Select 'Day'
Last SMU	N	Populate if known
Last SMU Capture Date	Y	Populate when last SMU is populated
Unit	Y	Select Hours for all equipment, Km for trucks. If not populated, last SMU value will be ignored by SIMSi which may cause issues.
Lifetime SMU	N	Pulled from equipment usage history
Use CAT feed	N	

Customer Data Standards: Equipment

Usage information

Usage volume

Mandatory usage counter:	☐
Enable Web registration:	☐
Start usage counter:	0.00
Usage start date:	
Current usage counter:	0.00
Measure date:	
End usage counter:	0.00
Usage end date:	
Grade of usage:	

Estimated usage

Estimated period usage:	0.00
Number of periods:	1
Period type:	Day
Call status:	

Last SMU

Last SMU:	7417.00
Last SMU capture date:	14/03/2017 12:00:00 am
Unit:	Hours
Base plan:	
Lifetime SMU:	7,417.00
Use visionlink:	☐
Use basic daily:	☐
Use CAT feeds:	☐
SMU expiry days:	0

Customer Data Standards: Equipment

Trade Information

Field	Mandatory	Data Standard
Prospect	Y	Must be updated via Functions > Transfer Ownership. Select from the list and do not type to avoid typos
Default rental class	N	Select if known

Trade information

Rental

Default rental class: [⌄]

Contract id: [ ]

Quotation id: [ ]

Attachment model: [ ]

Rental feature: [⌄]

Rental age: [0.00]

First rent date: [ ] 📅

RPO: [ ]

Contract

Customer: [3017799 ⌄]

Prospect: [PR013360 ⌄]

File ▾   Equipment   Setup   Sales   Functions

Transfer ownership
Update from j
Upd

EQ032545 : 380D

Transfer ownership (1)   ✕

Transfer ownership

Equipment number: [EQ032545]

From prospect account: [PR013360]

To prospect account: [⌄]

[OK]

Customer Data Standards: Equipment

Financial Dimensions

Field	Mandatory	Data Standard
Branch	N	N/A
Cost Centre	N	N/A
Department	Y	e.g. EEQ for Sales, EPS for Power Systems
Division	Y	e.g. EEQ for Sales, EPS for Power Systems
Equipment	Y	Auto populated from General section

Customer Data Standards: Equipment

◢ Financial dimensions

Default financial dimensions

Field	Value	Description
Contract:		No default
CostCentre:		No default
Department:	EEQ	Equipment Sales
Division:	EEQ	Equipment Sales
Equipment:	EQ032545	320D Medium Excavato
Location:		No default
ProductGroup:	⌄	No default
ProductionID:		No default
ProjectID:		No default
SalesPerson:		No default