

TERRA

CAT

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CUSTOMER DATA STANDARDS

Customers



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Customer Data Standards

TC-CDS-Customers-1.1

Customers

Data owners:

David Hotham, Greg McCarthy, Chris Heaton

SMEs:

Stephen Frayle, Greg McCarthy, Stuart Thornley

Responsible:

Rental, Power Systems, Sales, Parts & Service reps

e.g. CSAMs, ISRs, TAMs

Not for: Credit controllers

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Customer Data Standards: Customers

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 |
|---------|---------------|------------------------|-------------------------|
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Customer Data Standards: Customers

Business Rules: Credit customers

| | |
|---------|--|
| Rule 1 | The Business ERP (NAXT) must be the "One Source of Truth" for Customer information across the Business |
| Rule 2 | Any Business application containing Customer information must be consistent with NAXT, primarily CRM (SalesLink) |
| Rule 3 | Account numbers must be generated by NAXT and must be unique |
| Rule 4 | Credit accounts must only be created by Credit team for transactional purposes |
| Rule 5 | All account addition requests must be checked in NAXT for potential duplication before creation - NAXT must flag duplicates |
| Rule 6 | Every Customer account must be set up with a primary Division and a primary Industry Code |
| Rule 7 | There must only be 1 Customer account created in NAXT per Customer legal entity (NZBN) for all transactions |
| Rule 8 | Customers operating at multiple sites can have multiple accounts but only 1 account per site with the following naming convention: "Registered legal name (Site name)" Example: Downer NZ Pty Ltd (Auckland) |
| Rule 9 | Credit limits for each Customer account will be managed by Credit controllers |
| Rule 10 | Only the Credit team must have access to administer Credit Limits for Customers in NAXT - "Credit Limit by Business Area" |
| Rule 11 | Only nominated Marketing Gatekeepers and the Credit team must have access to perform any updates to Customer Master data |
| Rule 12 | All requests to close Customer accounts must be validated and documented with written communication |
| Rule 13 | All Customer accounts to be closed must be deactivated to prevent further transactions - Naming convention must not include "Do Not Use". It should |

Customer Data Standards: Customers

| | |
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| | include the current business practice of adding "XXX" to the customer name as a prefix. |
| Rule 14 | When a Customer account is closed, any Equipment records must be transferred to the new Owner account or be made inactive. Only nominated CSC and Marketing Gatekeepers should update Equipment. |
| Rule 15 | Customers transacting online (PCC) must have accounts created in NAXT |
| Rule 16 | NAXT user access levels and system functionality must be in accordance with established Business rules |
| Rule 17 | Data Owners are accountable for adherence to established Data standards and ongoing Data integrity |
| Rule 18 | 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 19 | Retention of Customer records must be in accordance with local regulations |
| Rule 20 | Any changes and exceptions to these rules must be approved by the Data Standards Owner |

Customer Data Standards: Customers

Business Rules: Cash Customers

| | |
|---------|--|
| Rule 1 | The Business ERP (NAXT) must be the "One Source of Truth" for Customer information across the Business |
| Rule 2 | Any Business application containing Customer information must be consistent with NAXT, primarily CRM (SalesLink) |
| Rule 3 | Account numbers must be generated by NAXT and must be unique |
| Rule 4 | Cash Sale accounts must be administered by the nominated cash sale Gatekeepers for transactional purposes |
| Rule 5 | All account addition requests must be checked in NAXT for potential duplication before creation - NAXT must flag duplicates |
| Rule 6 | The following steps must be taken before an account is created: 1. Search in NAXT (ERP) or SalesLink (CRM) if the Customer already exists 2. Ask "Have you purchased from us before?" If yes, utilise existing account. If no, move to step 3 below 3. Ask "Do you intend to purchase from us again?" If yes, encourage a Customer account to be created. If no, use the branch cash sale account |
| Rule 7 | If a Customer account is created, the minimum requirements are Customer name, address, and contact details |
| Rule 8 | Every Customer account must be set up with a primary Division and a primary Industry Code |
| Rule 9 | There must only be 1 Customer account created in NAXT per Customer legal entity (NZBN) for all transactions – If there is already a trade account, a cash sale account must not be created |
| Rule 10 | Customers operating at multiple sites can have multiple accounts but only 1 account per site with the following naming convention: "Registered legal name (Site name)" Example: Downer and Company Limited (Auckland) |

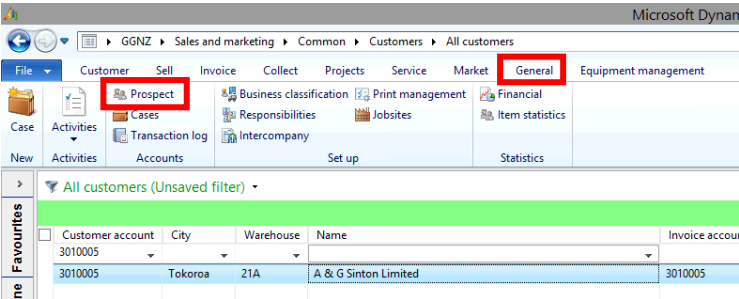
Customer Data Standards: Customers

| | |
|---------|--|
| Rule 11 | Nominated Marketing Gatekeepers and the Credit team must have access to perform any updates to Customer Master data |
| Rule 12 | All requests to close Customer accounts must be validated and documented with written communication |
| Rule 13 | All Customer accounts to be closed must be deactivated to prevent further transactions - Naming convention must not include "Do Not Use". Closed accounts must have prefix 'XXX' added to the customer name field. |
| Rule 14 | When a Customer account is closed, any Equipment records must be transferred to the new Owner account or be made inactive |
| Rule 15 | Customers transacting online (PCC) must have accounts created in NAXT |
| Rule 16 | NAXT user access levels and system functionality must be in accordance with established Business rules |
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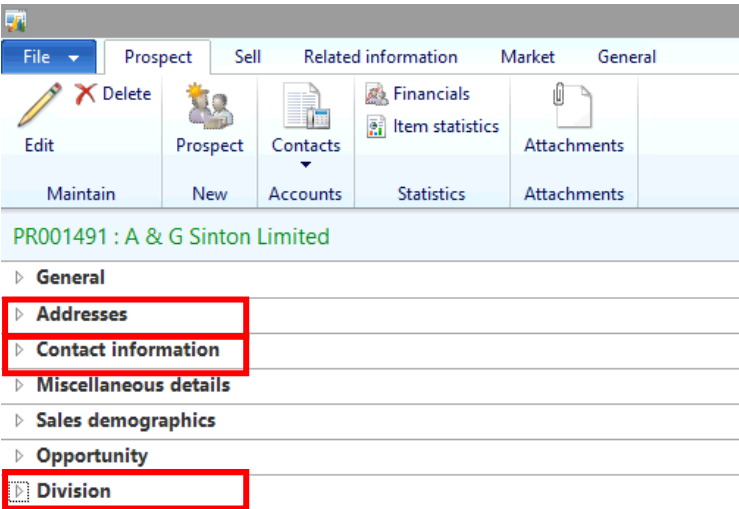
Customer Data Standards: Customers

Navigation

GGNZ > Sales and Marketing > Common > Customers > All customers



GGNZ > Sales and marketing > Common > Prospects > All prospects

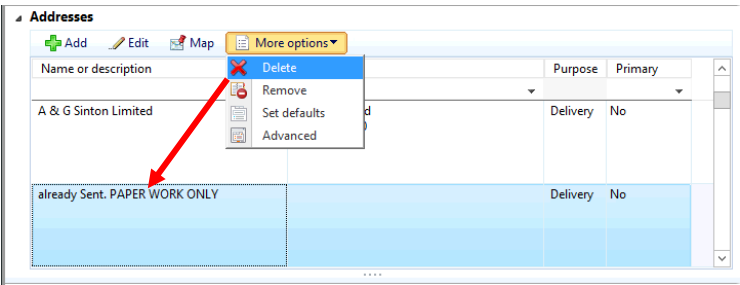
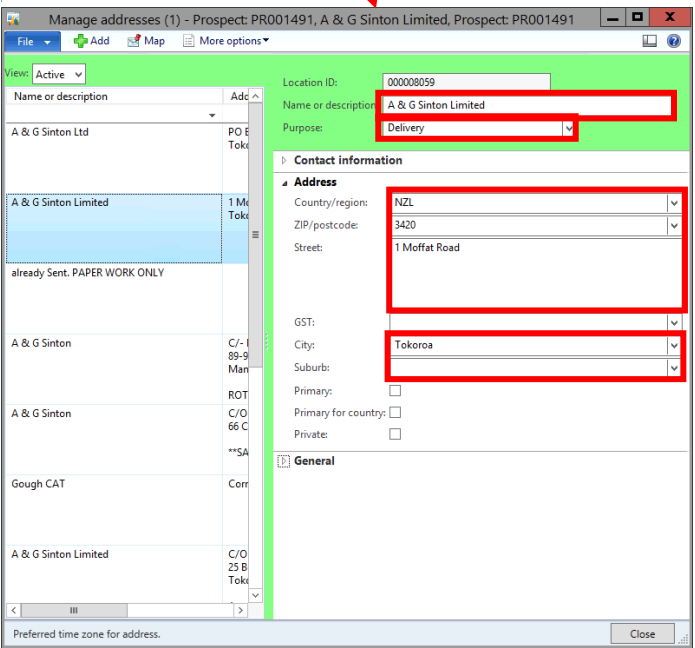
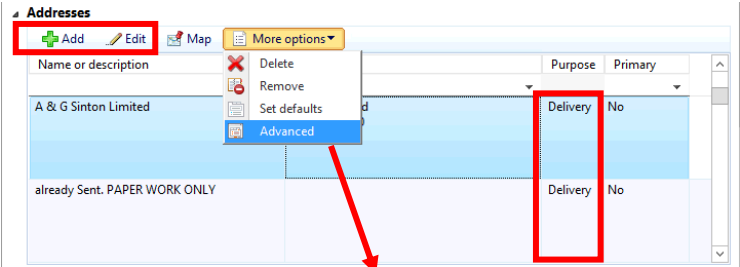


Customer Data Standards: Customers

Addresses > Purpose Delivery

| Field | Mandatory | Data Standard |
|---------------------|-----------|--|
| Name or description | Y | Registered Legal Name - must not include "Do Not Use" |
| Purpose | Y | Defaults to delivery. Credit should be in charge of Purpose "Business". |
| Country | Y | |
| Post Code | Y | Select from the dropdown. Credit Controllers to add new Postcodes along with associated fields |
| Street | Y | Must not be blank, not to be used for notes |
| City | Y | Populates automatically if Postcode is selected |
| State | Y | Populates automatically if Postcode is selected |

Customer Data Standards: Customers



Customer Data Standards: Customers

Contact information

| Field | Mandatory | Data Standard |
|-------------------|-----------|---|
| Type | Y | Phone/E-mail address etc |
| Contact No | Y | Must select 1 Primary check box, New Zealand phone number format including area code - no spaces, no symbols, no notes e.g. 0271234567 or 039876543 |
| Email Address | N | Must select 1 Primary check box |
| Primary check box | N | One primary contact type must be selected per customer account |
| Mobile check box | N | Required for every mobile number on account |

Customer Data Standards: Customers

Contact information

Add **More options** **Remove** **Advanced**

| Description | Type | Contact number/address | Preferred contact method | Extension | Primary |
|----------------|------|---------------------------|-------------------------------------|-----------|-------------------------------------|
| E-mail address | | btaccounts@bathurst.co.nz | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Phone | | 03 345 6000 | <input type="checkbox"/> | | <input checked="" type="checkbox"/> |

Edit contact information (1) - Prospect: PR001491, A & G Sinton Limited, Pros...

File **Add** **Remove**

| Description | Contact number/address |
|----------------|------------------------|
| main phone ... | 078860751 |

Location: 000008056

Description: main phone number

Type: Phone

International calling code: 64

Phone: 078860751

Extension:

Purpose: Business

Mobile: ☐

Primary: ☒

Private: ☐

Reference field in a different table **Close**

Edit contact information (1) - Prospect: PR028345, BT Mining Ltd

File **Add** **Remove**

| Description | Contact number/address |
|---------------------------|------------------------|
| btaccounts@bathurst.co.nz | 03 345 6000 |

Location: 000579737

Description:

Type: E-mail address

E-mail address: btaccounts@bathurst.co.nz

Purpose: Business

Instant message: ☐

Primary: ☒

Private: ☐

View or enter a description of the selected contact information record. **Close**

Customer Data Standards: Customers

Division

| Field | Mandatory | Data Standard |
|-----------------------|-----------|--|
| Division | Y | Select your division e.g. EPT, EEQ, EPS. Remove legacy or unused divisions e.g. TWL, EEN, ETR |
| Primary Division | N | Only one Division must be selected - Primary checkbox ticked. It's associated Industry code will represent the customer's main industry. |
| Industry Code | Y | Each division must have an associated industry code populated. E.g. select both SIC and CIC codes. |
| Primary Industry Code | N | More than one Industry Code may be populated; however, the Primary checkbox must be selected only once |

Customer Data Standards: Customers

Division

+

Add

x

Delete

Details

| Primary | Division | Description |
|-------------------------------------|----------|-----------------|
| <input type="checkbox"/> | EEQ | Equipment Sales |
| <input checked="" type="checkbox"/> | EPT | Parts Sales |

Prospect division (1 - ggnz) - Division: EEQ

FileNewDelete

Overview

General

Division

EEQ

Description

Equipment Sales

Division - Sales Person

Industry codes

Division reference

NewDelete

| Primary | SIC Code | Description | PWC/CIC code | PWC Description | CIC code | CIC Description |
|-------------------------------------|----------|-------------|--------------|-----------------|----------|-----------------------|
| <input checked="" type="checkbox"/> | BB111 | Coal Mining | 510 | Coal - Surface | MN10 | Coal Mining - Surface |

Whether this SIC code is primary or not.

282NZDggnzClose