

29 JUNE 2020

CUSTOMER DATA STANDARDS

Contacts



Terra Industrial New Zealand Ltd

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Customer Data Standards

TC-CDS-Contacts-1.1

Contacts

Data owners:

Martin Dowling, David Hotham, Greg McCarthy, Chris Heaton

SMEs:

Geoff Clapp, Stephen Frayle, Greg McCarthy, Stuart Thornley

Responsible:

e.g. Credit Controllers, CSAMs, ISRs, TAMs, Parts team, Service team etc.

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Document History

Document information

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

Document amendment history

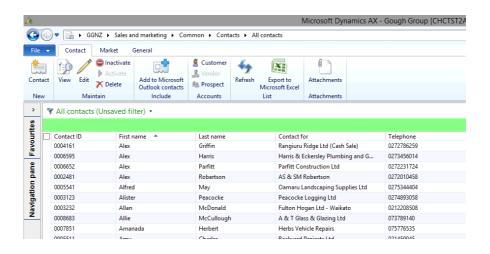
Version	First Release	Sections(a)	Summary of
		Amended	Amendment

Business Rules

Rule 1	The Business ERP (NAXT) must be the "One Source of Truth"
	for Customer Contacts across the Business
Rule 2	Any Business application containing Customer Contacts must be consistent with NAXT, primarily SalesLink (CRM)
Rule 3	Every Customer Contact must have a First Name, Last Name, Phone Number, and Email Address as a minimum
Rule 4	There must be Customer Contacts nominated on each account to participate in Customer surveys unless they opt out
Rule 5	There should only be 1 Customer Contact per account for each survey type or for a combination of multiple surveys (New Sales, Rental, Parts, Service)
Rule 6	Customer Contacts opting not to be contacted must be flagged in NAXT
Rule 7	All Customer Contact additions and updates must be performed through CRM; additions may also be performed through the Credit application process for new Customer accounts
Rule 8	Only nominated Marketing Gatekeepers and the Credit team must have access to create or edit Customer Contacts in NAXT
Rule 9	All record addition requests must be checked in NAXT for potential duplication before creation - NAXT should flag duplicates
Rule 10	All required inputs must be made mandatory in NAXT and must be complete and valid
Rule 11	All Customer Contacts that are no longer relevant must be removed from the Customer record
Rule 12	NAXT user access levels and system functionality must be in accordance with established Business rules
Rule 13	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 14	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

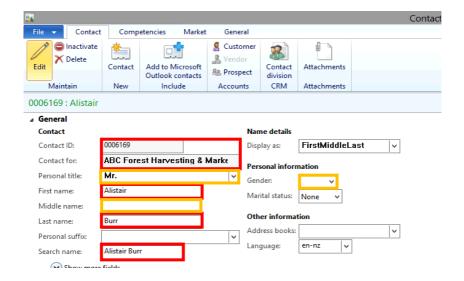
Navigation

GGNZ > Sales and Marketing > Common > Contacts > All contacts



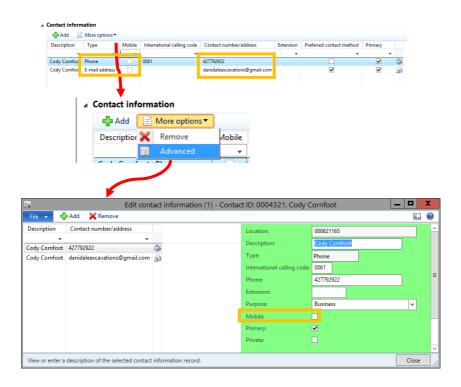
General

Field	Mandatory	Data Standard
Contact ID	Υ	System generated -
		Unique identification
Contact For	Υ	Customer account name
Personal Title	N	
First Name	Υ	Must be complete and
		valid. Not all-caps.
Middle Name	N	Must be complete and
		valid. Not all-caps. Not a
		note field.
Last Name	Υ	Must be complete and
		valid. Not all-caps.
Gender	N	
Search Name	Υ	System auto-fills once
		name entered
Name or	Υ	Registered Legal Name -
Description		must not include "Do
		Not Use"
Address	N	System auto-fills from
		the Customer record;
		override if required



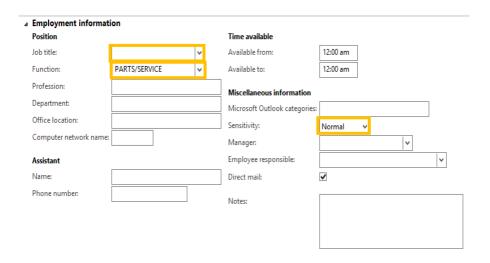
Contact information

Field	Mandatory	Data Standard
Type: Phone	N	Numbers only, no spaces, no
		text, no notes. Purpose
		default: Business Primary
		checkbox must be selected
		once. There is a separate
		field for extension numbers
		to use, they should not be
		added here.
Phone > More	N	Tick the box if the phone is a
options >		mobile number
Advanced > Edit		
contact		
information >		
Mobile		
Type: E-mail	N	Purpose default: Business
Address		Primary checkbox must be
		selected once



Employment Information

Field	Mandatory	Data Standard
Job Title	N	
Function	N	Select the department you are in e.g. if you are in Power Systems, select Power Systems.
Sensitivity	N	Default: Normal



Miscellaneous details

Field	Mandatory	Data Standard
Do Not Mail - Customer Request	N	
Do Not Mail - Legal	N	
Do Not Call	N	To be selected if requested by Customer
Do Not Email	N	To be selected if requested by Customer
Duplicate Contact	N	

