

TERRA



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CUSTOMER DATA STANDARDS

Sales Person



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Customer Data Standards: Sales Person

Customer Data Standards

TC-CDS-SalesPerson-1.1

Sales Person

Data owners:

David Hotham

For:

Marketing team, Sales Manager

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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) Amended	Summary of Amendment

Customer Data Standards: Sales Person

Business Rules: Sales Person

Rule 1	The Business ERP (NAXT) must be the "One Source of Truth" for Customer Sales Reps across the Business
Rule 2	Any Business application containing Customer Sales Reps must be consistent with NAXT, primarily SalesLink (CRM)
Rule 3	All required inputs must be made mandatory in NAXT and must be complete and valid
Rule 4	Every Customer Sales Rep must have a unique NAXT Salesman code with the following convention in accordance with their area of responsibility: Division + Location + number sequence e.g. EEQROT01 (EEQ Equipment + ROT Rotorua + 01)
Rule 5	A running sequence of Sales Rep codes must be centrally maintained by Marketing Gatekeepers
Rule 6	All requests for Sales Rep setup must be received via the established Business process
Rule 7	Only nominated Marketing Gatekeepers must have access to create Sales Reps in NAXT
Rule 8	Line Managers must ensure that every Customer account has a Sales Rep assigned in accordance with their respective Customer coverage area
Rule 9	Customer accounts must typically be assigned as follows: 1 x ISR or PSSR against EPT division 1 x EEQ against EEQ division 1 x POWER against EPS division
Rule 10	Any Sales Rep no longer relevant against the assigned account must be removed and replaced accordingly
Rule 11	Sales Reps codes must stay with the established Customer regions rather than with the Sales Reps

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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
Rule 15	Any changes and exceptions to these rules must be approved by the Data Standards Owner

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

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Sales order defaults

Field	Mandatory	Data Standard
Salesman code	Y	Running sequence - Unique identification
Division	Y	Rep's primary division
Area of Business	N	
Salesperson Type	Y	In accordance with area of responsibility: ISR - Inside Sales Rep, CSAM, TAM.
OLGA Type	Y	Aligned to Salesperson Type
Worker	Y	Dropdown selection from Employee Address book
Name	Y	Auto populated from Worker selection
Telephone	N	Auto populated from Worker selection
E-mail	N	Auto populated from Worker selection
PARS	N	Default: 0

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Division

Buttons: Add, Delete, Details

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

Prospect division (1 - ggnz) - Division: EEQ

Overview

General

Division	Description
EEQ	Equipment Sales

Division - Sales Person

Buttons: New, Delete, Sales person

Salesperson type	Salesman code	Name	PARS	Special assignment
EQUIPMENT	EEQTAR01	Dean Brown	0	<input type="checkbox"/>

Sales person (1 - ggnz) - Salesman code: EEQTAR01, Dean Brown, Sale...

Buttons: File, New, Delete

Salesman code	Worker
EEQTAR01	Dean Brown

Salesman information

Salesman code: EEQTAR01

Division: EEQ

Area of business: Equipment Sales

Salesperson type: EQUIPMENT

OLGA type: Machine

Identification

Worker: Dean Brown

Name: Dean Brown

Telephone: 6421582826

E-mail: Dean.Brown@goughcat.co.nz

PARS: 0

Telephone number. (282) NZD ggnz Close