

TERRA

CAT

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CUSTOMER DATA STANDARDS

Contacts



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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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Customer Data Standards: Contacts

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: Contacts

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

Customer Data Standards: Contacts

Navigation

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

Microsoft Dynamics AX - Gough Group [CHCTST2A]

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

File	Contact	Market	General
Contact	View	Edit	Inactivate
New	Maintain	Delete	Activate
		Add to Microsoft Outlook contacts	Include
		Customer	Vendor
		Prospect	Accounts
		Refresh	Export to Microsoft Excel List
		Attachments	Attachments

> All contacts (Unsaved filter)

Contact ID	First name	Last name	Contact for	Telephone
0004161	Alex	Griffin	Rangioru Ridge Ltd (Cash Sale)	0272786259
0006595	Alex	Harris	Harris & Eckersley Plumbing and G...	0273456014
0006652	Alex	Parfitt	Parfitt Construction Ltd	0272231724
0002481	Alex	Robertson	AS & SM Robertson	0272010458
0005541	Alfred	May	Oamaru Landscaping Supplies Ltd	0275344404
0003123	Alister	Peacocke	Peacocke Logging Ltd	0274893058
0003232	Allan	McDonald	Fulton Hogan Ltd - Waikato	0212208508
0008683	Allie	McCullough	A & T Glass & Glazing Ltd	073789140
0007851	Amanada	Herbert	Herbs Vehicle Repairs	075776535
0005511	Amy	Charles	Deborah Projects Ltd	021450045

Customer Data Standards: Contacts

General

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

Customer Data Standards: Contacts

0006169 : Alistair

General

Contact

Contact ID: 0006169

Contact for: ABC Forest Harvesting & Marketing

Personal title: Mr.

First name: Alistair

Middle name:

Last name: Burr

Personal suffix:

Search name: Alistair Burr

Name details

Display as: FirstMiddleLast

Personal information

Gender:

Marital status: None

Other information

Address books:

Language: en-nz

[Show more fields](#)

Customer Data Standards: Contacts

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 options > Advanced > Edit contact information > Mobile	N	Tick the box if the phone is a mobile number
Type: E-mail Address	N	Purpose default: Business Primary checkbox must be selected once

Customer Data Standards: Contacts

Contact information

Description	Type	Mobile	International calling code	Contact number/address	Extension	Preferred contact method	Primary
Cody Cornfoot	Phone	<input type="checkbox"/>	0061	427792922		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cody Cornfoot	E-mail address	<input type="checkbox"/>		danidaleexcavations@gmail.com		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Contact information

+ Add **More options** ▼

Description **✗** Remove **Mobile**

Advanced

Edit contact information (1) - Contact ID: 0004321, Cody Cornfoot

File **+** Add **✗** Remove

Description	Contact number/address
Cody Cornfoot	427792922
Cody Cornfoot	danidaleexcavations@gmail.com

Location: 000621165

Description: Cody Cornfoot

Type: Phone

International calling code: 0061

Phone: 427792922

Extension:

Purpose: Business

Mobile: ☐

Primary: ☒

Private: ☐

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

Customer Data Standards: Contacts

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

Customer Data Standards: Contacts

Employment information

Position

Job title:

Function:

Profession:

Department:

Office location:

Computer network name:

Assistant

Name:

Phone number:

Time available

Available from:

Available to:

Miscellaneous information

Microsoft Outlook categories:

Sensitivity:

Manager:

Employee responsible:

Direct mail: ☒

Notes:

Customer Data Standards: Contacts

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	

Customer Data Standards: Contacts

Contacts (1 - ggnz) - Contact ID: 0006169, Alistair Alistair Burr

File Contact Competencies Market General

Edit Inactivate Delete Contact Add to Microsoft Outlook contacts Include Customer Vendor Prospect Attachments CRM Attachments

0006169 : Alistair

Primary address
109 Taikorea Road
RD 3
Palmerston North 4473

Contact for

General

Addresses

Contact information

Employment information

Miscellaneous details

Salutation

Salutation 1:

Salutation 2:

Personality and influence

Loyalty:

Decision:

Character:

Complimentary close

Complementary 1:

Complementary 2:

VIP: ☐

Personal

Citizenship country/region:

Native language:

Mailing

Do Not Mail - Customer Request: ☐

Do Not Mail - Legal: ☐

Do Not Call: ☐

Do Not Email: ☐

Duplicate Contact: ☐

Identification

Organisational ID:

Government ID:

Mileage

Mileage:

Skill mapping

Skill mapping: ☐

Reason code:

OLGA

Contact type:

The salutation to use when contacting the contact

(279) NZD ggnz Close