

CUSTOMER AUTHORITY LEVELS (CAL)

WHAT IS IT?

The Customer Authority Level function in Parts.Cat.Com (PCC) allows customers to manage orders within their organization– approve, edit, reject, delete – before sending them to their Cat Dealer. This can eliminate several manual steps for some customers that have a defined internal purchasing process and purchasing roles.

The Customer Authority Level function in PCC enables a basic approval process based on purchasing limits. If a customer has a more complex approval process, they may be a good candidate for Integrated Procurement.

HOW CAN PROFESSIONAL BUYERS ACCESS IT?

Dealers assign the Customer Authority Manager (CAM) role within a Dealer Customer Number (DCN). This CAM is then able to set up approvers, submitters and define purchasing/approval limits for users within the company directly in PCC, as needed.

WHAT ARE THE CUSTOMER BENEFITS?

Customers will experience clearly defined purchasing roles within the organization (i.e., approvers, submitters, managers). Customers will also have better control of orders sent to the dealer and will have streamlined purchase order administration and real time notifications.

CAL PERSONAS:

[+] Customer Authority Manager (CAM)

A dealer must activate one or more customer authority managers at the Dealer Customer Number (DCN) level. It is recommended to activate at least two managers to avoid delays in processes if one manager is unavailable; the other manager can perform the necessary tasks. Managers are notified via email when a new user is registered with the Dealer and assigned to the DCN they manage. Managers can set additional roles, such as Approvers and Submitters and update the ordering limit for any user that is associated to a DCN they manage. Managers are required to approve or reject orders that are over an Approver's ordering limit.

[+] Approver

Approvers are assigned by the Customer Authority Manager along with their approval /ordering limit in PCC. Approving, Rejecting or Deleting orders are the main functionalities of the Approver. The Approver is notified via email when a new order has been created by the Submitter. The Pending Order Approval email contains a link to the order in PCC. Approvers have options to perform partial or complete edits to the order before proceeding to approving the order or simply approving the order without any modifications. Approvers are alerted when attempting to edit the order through the Edit button as any existing item in the Cart will be automatically removed if proceeding with editing the cart.

[+] Submitter

Submitters are managed by the Customer Authority Manager along with their ordering limit in PCC. Submitters can add parts to their shopping cart and go through the order checkout process. Any order placed above the Submitter's ordering limits, must go through an Approver for approval. Orders below the Submitter's ordering limit can be sent directly to the dealer. Submitters can search for any order using the order history page. Submitters can re-order pending, rejected, deleted, and approved orders.

[+] CAL Notifications

In addition to automated order approval notifications, Approvers can also enable Orders To Approve Reminders within PCC's Notification Preferences. This will allow Approvers to receive a weekly reminder email with any orders pending for approval across all DCNs that the Approver manages.

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