Equipment Data
User Reference

Introduction

Equipment Data is the source of dealer to customer to equipment relationship information for many applications such as PartStore™ and VisionLink®. The application is an administrative dealer tool to add, edit and update ownership information.
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Overview

Equipment Data supports multiple applications such as VisionLink, PartStore, Cat Equipment Data Explorer and others as the primary source for dealer to customer to equipment relationships.

Equipment Data Principles:
- Manage ownership details in one place for multiple applications to avoid conflicts and duplicate administrative effort
- Cat dealers maintain ownership information in Equipment Data for multiple applications in order to determine view privileges and protect data privacy
- Easy to use web application to add, edit and maintain equipment ownership information
- Easy to manage change of ownership when customers are in same or different dealer territories
- Provide integration to load equipment and ownership details from dealers' business management systems
- Robust, reliable and scalable

Export equipment list

Equipment associated with customer numbers from your dealership can be exported from Equipment Data.

1) Click My Equipment List.

2) Select export format.
   a. CSV File - The CSV is a comma separated values file. This structure lends itself to spreadsheet applications but if opened and not imported, leading zeros and long numeric formats may not be represented as desired.
   b. Text File – A Text file contains values as plain text with a comma separating values. Use the import function of your program to format for spreadsheet.
NOTE: It may be necessary or desired to right click on CSV File or Text File link to save the file so that it may be imported into your preferred program.

3) Right click file format preference to save file to your computer.
4) Import the saved file into your preferred spreadsheet program.
5) Click OK to close dialog box.

**View or edit equipment**

Equipment already available in Equipment Data can be viewed or edited.

1) Enter Serial Number or other search criteria and click Continue.

**Search options include:**
- **Serial Number:** Minimum 3 characters needed to search. Up to 17 characters can be entered.
- **Make:** Manufacturer options include Any Make, Cat Make Only, Non Cat Makes Only
- **UCID:** Universal Customer ID
- **DCN:** Dealer customer number associated with UCID (Universal Customer ID)
DCN Name: Dealer customer name associated with UCID
Equipment ID: Equipment nickname or asset ID

2) Results will be displayed in table.

3) Place cursor over desired search results and click to view equipment and ownership details.
4) Editable files are displayed as hyperlinks (blue underline). Editable fields include VIN (vehicle identification number), Equipment ID and Ownership start date.

Add CAT equipment

Equipment can easily be added to Equipment Data.

1) Enter Serial Number or other search criteria and click **Continue**.

2) If no results are found, **Click to add equipment**.

3) When adding CAT equipment, the Make, Model and Manufacturing year will prepopulate. Click **Continue** to add customer information.

4) Click **Display Product Structure** to view “as shipped” component details.
Add other makes of equipment

Equipment from other manufactures can easily be added to Equipment Data.

1) Enter Serial Number or other search criteria and click Continue.
2) If no results are found, Click to add equipment.
3) Enter required information: Make, Model and Manufacturing Year. Enter optional information: VIN. Click Continue.

NOTE: If 2 character manufacture code from your DMS is not already mapped to the Caterpillar 3 character code, you will be prompted to enter. If code is entered during
the add equipment process, the relationship is retained for future use. Refer to Manage Make (Manufacture) Codes for more information.

Add customers

Current Owner

The current owner of the equipment can be added.

1) Once equipment is added, [Click to select new customer].
2) Select ownership type of Owned.
3) Enter customer information in search. Results will be narrowed and displayed in table.

NOTE: Dealer customer number must be associated with UCID (Universal Customer ID) before it can be searched in Equipment Data.

4) Select customer and confirm action. Selected customer will be displayed in CURRENT OWNER section with ownership type of Owned.
Rental, Leased, Inventory or Unknown

Additional customers can be associated with equipment when equipment is rented, leased, in inventory or ownership is unknown.

1) To add additional customers, **Click to select new customer**.

2) Select ownership type of **Rented, Leased, Inventory or Other** as desired.

3) Enter customer information in search. Results will be narrowed and displayed in table.

**NOTE**: Dealer customer number must be associated with UCID (Universal Customer ID) before it can be searched in Equipment Data.

4) Select customer and confirm action. Selected customer will be displayed in **OTHER OWNERS** section with owner type selected.
Managing multiple customer associations

Multiple customers can be associated to a single equipment without conflict. The following rules apply.

1) Only one ownership type of “Owned” is supported for a given UCID.

2) Multiple customers with “ Owned” status are only permitted if all customers are associated with same UCID.
3) Ownership types of Rented, Leased, Inventory or Unknown are permitted without conflict or constraint.

4) VisionLink Store considers the following priority when multiple owners exist:

1. Rented
2. Leased
3. Inventory
4. Owned
5. Unknown

If more than one owner exists for a given ownership type, the owner created last will be available in VisionLink Store.

Delete customer

Customer can be removed from equipment.

1) Click the trash can icon for the customer to be removed.

2) Click **Retire** to confirm action.
Change customer owner – same dealer

When equipment owner changes to a customer in with the same dealer, the following change customer procedure can be followed.

1) View equipment with customer to be changed, **Click to select new customer**.

2) Select ownership type of **Owned**.

3) Enter customer information in search. Results will be narrowed and displayed in table.

**NOTE**: Dealer customer number must be associated with UCID (Universal Customer ID) before it can be searched in Equipment Data.

4) Change of ownership informational message is displayed. Click **Continue** to confirm action.
Change customer owner – different dealer

When equipment owner changes to a customer in with different dealers, the following change customer procedure can be followed.

Requesting change of ownership

1) View equipment with customer to be changed, [Click to select new customer].

2) Select ownership type of **Owned**.

3) Enter customer information in search. Results will be narrowed and displayed in table.

**NOTE:** Dealer customer number must be associated with UCID (Universal Customer ID) before it can be searched in Equipment Data.

5) Change of ownership informational message is displayed. Click **Continue** to confirm action.
NOTE: The new ownership record will be put in Pending state.

- An email will immediately be sent to the current owning dealer requesting the change of ownership.
- The new ownership record will be in pending state until owning dealer accepts or denies the change.
- If the owning dealer does not respond within 7 days, the owner will be removed and the pending customer will become active.
Managing change of ownership requests

The dealer with the current ownership record will receive a change of ownership request via email. Both owning and pending dealers are included in the email. Contact information for each dealer is also included.

1) The owning dealer receives email requesting change of ownership.

2) Click **Accept** and the original ownership record will be removed and no further action is required.

Click **Deny** and no change in ownership will be initiated. In the event the ownership change is denied, please reply all and provide the requesting dealer information about the discrepancy so they may respond appropriately to their customer.

To view more information regarding the ownership request, **Click Here** to view details.

Upon clicking link in email, Equipment Data will open a browser window to the equipment details view for the given equipment displaying the action taken. Login may be required.
Alternate method to manage change of ownership requests

An alternate method to manage change of ownership requests is through the MailBox.

1) If there are pending ownership requests when you login to Equipment Data, the MailBox in the top right will pulse. Click the MailBox to display pending requests.

2) After reviewing the request, click Take Action! , the equipment details page for that equipment will open. Select the trash icon to delete your ownership record.
Manage Users

Any valid CWS ID has default view privileges to equipment in Equipment Data. Dealer administer access can be maintained by selecting the USERS tab in the top navigation.

1) Enter Last Name or CWS ID and click SEARCH.

2) User matching search results will be displayed in the table. Notice Current Role indicates the users current privileges in Equipment Data.

3) Select Make Dealer Admin to change a viewer’s roles to admin.
   
   Select Make Viewer to change an admin’s role to viewer.

Dealer Details

Dealer details contain the contact information used for change of ownership requests. Each dealership is limited to a primary and secondary contact. Contact information must be keep current and valid in order for equipment and ownership records to be added or edited.
1) Click on link to edit:
   - Dealer Contact Name
   - Dealer Email
   - Dealer Contact Number

2) Enter contact details. Click ☑️ to save or ☓️ to cancel.
3) To add second contact, click Add new Contact.

Manage Make (Manufacture) Codes

Dealer two character make codes must be associated or mapped to Caterpillar’s three character make codes.

1) Upon selecting Make Codes in the upper navigation, the make code table will display.

2) Search for the desired Manufacture in the table. Editable files are displayed as hyperlinks (blue underline).

3) If selected manufacture code is not already displayed, click the -- to edit the field. Enter the 2 character code from your DMS.
4) If selected manufacture code is not already displayed, click the -- to edit the field. Enter the 2 character code from your DMS.

5) Edit Dealer Description if desired.