**CAT INTEGRATED PROCUREMENT TRAINING**

**June 11-13, 2019**

From June 11-13 Cat will be hosting dealers from across Asia-Pacific for an intensive training program on Cat Integrated Procurement (IP). The training will also include some supplementary e-commerce topics. The agenda will be delivered by Caterpillar eProcurement Technical Leader Jim Fehland and his team of e-commerce specialists.

**This in-depth training is designed for dealer IT staff and e-commerce administrators with direct responsibility for Cat IP prospecting and deployment.**

Attendees will gain a detailed understanding of:

* Best practice recommendations for identifying and engaging potential new customers
* How Integrated Procurement works (transaction types, optional configurations)
* The end to end implementation process to deploy a new Cat IP connection
* A thorough review of the onboarding process and onboarding document
* Tips and advice to document and automate varying customer business rules
* Learn how to connect to your customers using online marketplaces such as Ariba
* How to use the Dealer Maintenance Tool (DMT) effectively to efficiently manage existing Cat IP connections
* The Cat IP support process & resources
* Onsite presentations from Ariba and a Cat IP customer
* e-commerce topics including PCC, new UCID tool, SIS 2.0, plus more TBC.
* Open Q&A Session – Bring Your Own Project

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| **When:** | Start – 8.30 a.m. Tuesday June 11  End – 3.00 p.m. Thursday June 13 |
| **Where:** | Cat Minestar Office  Level 20,  300 Adelaide Street  BRISBANE |
| **Hotel:**  **To Register:** | To be confirmed. Cat will negotiate a hotel rate once attendee numbers are confirmed. Location will be Brisbane CBD.  Email Derek Cadman to confirm your attendance or accept an invite that will be sent out [Cadman\_derek@cat.com](mailto:Cadman_derek@cat.com) |

**Cat® Integrated Procurement Training**

APD ⦁ June 11-13 ⦁ Brisbane, Australia

**Location:** Cat Minestar Office

Level 20,

300 Adelaide Street

BRISBANE

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| **Day 1: Tuesday, June 11 –** Cat Minestar Office, Brisbane | | |
| 7:00 a.m. – 8:30 a.m. | Breakfast & walk to venue |  |
| 8.30 a.m. – 9.00 a.m. | Safety and Introductions |  |
| 9:00 a.m. – 3:15 p.m. | **The Features, Value and Benefits of Cat IP**  **Introduction to Cat IP:** *The introduction includes a summary of the purpose of IP, major accounts currently accessing the system and an introduction to the training program agenda.*  **Metrics, POPS & Sales Growth:** *Here the team will elaborate on the impact an IP connection has on increasing customer part sales and the tools that help to identify potential sales growth.*  **Benefits – Customer:** F*ocuses on each of the individual benefits of Cat IP to the customer, elaborating on which process steps can be eliminated and how Cat IP should be pitched to a customer.*  **How It Works:** *This topic delves into the customer requirements for Cat IP, the programming languages of IP and a demonstration of the “Rules Engine” which demonstrates the adaptability of the Cat IP system.*  **Benefits – Dealer:** *Every IP connection is different and will deliver different benefits to the dealership, this topic will cover the operational benefits of Cat IP to the dealer as well as the potential POPS gain.*  **Customer Demonstration**  *A Cat IP customer will provide a demo of their IP integration with WesTrac.* |  |
| 12:30 p.m. – 1:30 p.m. Lunch |
| 3:15 p.m. – 3:30 p.m. | Break |  |
| 3:30 p.m. – 4:30 p.m. | **4 Phases:** *The 4 phases of building a Cat IP connection that starts with defining candidates.*  **Implementation Process:** *This presentation elaborates on how a Cat IP project is run, the keys to a successful project and an expectation of project timelines.* |  |
| 4:30 p.m. – 5:15 p.m. | **Supplier Hosted Catalog**  *This topic covers the subject of how a customer can leverage Cat IP to return product data from a supplier’s website into their own procurement system.* |  |
| 5:15 p.m. – 5.25 p.m. | QA&; Day 1 Training Concludes |  |
| 6.30 p.m. | **Hosted Dinner** |  |

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| **Day 2: WEDNESDAY, June 12 –** Cat Minestar Office, Brisbane | | |
| 7:00 a.m. – 8:30 a.m. | Breakfast & walk to venue |  |
|  | **e-Commerce Topics (TBC)** |  |
| 8.30am – 9.30 am | *SIS 2.0 Updates* |  |
| 9.30am – 10.30 am | *Parts.cat.com DMT Management* |  |
| 10:30 a.m. – 10:45 a.m. | Break |  |
| 10.45 a.m – 11.30 a.m | New UCID Tool |  |
|  | \*\* more ecommerce topics available upon request \*\* - contact Derek |  |
|  | **Cat IP (Continued)** |  |
| 11:30 a.m. – 12:00 p.m. | **Transactions**  *This presentation ends Day 1 by discussing the flexibility of the Cat IP system and the different type of transactions that can be managed by Cat IP to improve customer process efficiencies.* |  |
| 12:00 p.m. – 12:30 p.m. | **Parts Orders**  *The core of Cat IP –the steps by which a customer can order parts from their own ERP and the different types of order processes available to choose from.* |  |
| 12:30 p.m. – 1:30 p.m. | Lunch |  |
| 1:30 p.m. – 2:00 p.m | **Parts Invoices**  *This presentation discusses the communications from Cat IP back into the customers systems regarding standard and credit invoice protocols.* |  |
| 2:00 p.m.. – 2:30 p.m. | **Service Pro Formas**  *Document created from processing an open work order through the pricing programs without invoicing the work order.* |  |
| 2:30 p.m. – 3:00 p.m. | **Service Orders & Invoices**  *This presentation delves in to the capability of Cat IP for receiving service orders (a list of parts & services) and service invoices (labour charges, miscellaneous charges, part charge)* |  |
| 3:00 p.m.– 4:30 p.m. | **Onboarding Document & Process Map**  *This is an important presentation that details the steps by which the existing processes are documented in order to identify the business rules that would then need to be replicated automatically within the Cat IP system.* |  |
| 4:30 p.m. – 5:30 p.m. | **Marketplaces & Ariba Onsite presentation**  *A network of trading partners (suppliers and customers) connected by a centralized point for the purpose of business-to-business commerce activities. This deck will elaborate on how Cat IP can connect to customers through these marketplace connections.* | Cat & Ariba |
| Evening. | Day 2 Training Concludes |  |

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| **Day 3: THURSDAY, June 12 –** Cat Minestar Office, Brisbane | | |
| 7:00 a.m. – 8:30 a.m. | Breakfast & walk to venue |  |
| 8:30 a.m. – 9:00 a.m. | **Supporting**  *The Supporting presentation will outline all the tools and support channels available to Cat IP dealer staff to build and support the connections.* |  |
| 9:00 a.m. – 12:30 p.m.  (includes break) | **Dealer Maintenance Tool**  *The DMT is the critical software used by Cat IP administrators to build and provide ongoing support to Cat IP connections.* |  |
| 12:30 p.m. – 1:00 p.m. | Lunch |  |
| 1:00 p.m.. – 3:00 p.m. | **Action items and Q&A session**  *This will be an open forum for questions and elaboration on any topics you’d like to discuss before the end of this training program.* |  |
| 3:00 p.m. | Training Concludes. Depart for Hotel/Brisbane Airport |  |
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