

# **Territory management**

Entersoft Business Suite® | Entersoft CRM®

User guide

---

## Identification

Software version      Territory management

Last updated on                      18/01/2021









## Copyright

© Copyright 2020 Entersoft S.A. All rights reserved.

No part of this work may be reproduced, transmitted, stored, or used in any form or by any means, without the prior written permission of the publisher. Regarding the present content ...

- It may be altered at any time.
- It serves exclusively informative goals.
- No guarantee whatsoever is handed out for the possible existence of mistakes or the wrongful use or non-wanted results produced by the use of processes hereby followed and recommended.

## Symbols

Symbol	Definition
	User
	Administrator/Consultant
	Attention!
	Suggestion
	Note
	Example
	Configuration
	Parameter
<ENTER>	Keyboard
Menu	Menu options, actions

## Contents

Position .....	6
1. Working with positions .....	8
Rule set type & rule set .....	9
2. Working with rule set types .....	11
3. Working with rule sets .....	12
Territory hierarchy & territory .....	13
4. Working with territory hierarchies .....	15
5. Working with territories .....	16
5.1 Manage territory hierarchy nodes .....	19
5.1.1 Add new nodes of next level .....	19
5.1.2 Add new nodes of the same level .....	19
5.1.3 Collapse nodes .....	19
5.1.4 Expand nodes .....	19
5.1.5 Refresh node list .....	20
5.1.6 Delete node .....	20
5.1.7 Copy - Paste node .....	20
5.2 Manage validity periods .....	20
5.2.1 Set trade account rule set qualifiers .....	20
5.2.2 Preview trade account rule set .....	21
5.2.3 Set item rule set qualifiers .....	22
5.2.4 Preview item rule set .....	22
5.2.5 Assign supervising & representative position .....	23
5.2.6 Update validity period status .....	24
5.2.7 Copy validity period .....	24
5.3 Process territory relations .....	25
Administrative lists & reports .....	26
6. Administrative lists .....	27
6.1 Positions .....	27
6.2 Entry rule set .....	28
6.3 Sales territory hierarchies .....	29
6.4 Territories .....	30
7. Administrative reports .....	31
7.1 Customers with no territory .....	31

7.2	Items - Services with no territory .....	32
7.3	Persons with no territory .....	33
7.4	Business addresses with no territory .....	34
7.5	Customers assigned to multiple territories .....	35
7.6	Persons assigned to multiple territories .....	36
7.7	Business addresses assigned to multiple territories .....	37
7.8	Territory - Customers history log .....	38
7.9	Territory representative assignment .....	39
7.10	Territory information .....	40
7.11	Information about territory period trade account rule .....	41
8.	Territory connected applications .....	42

## Prologue

Territory management is a tool that allows you to manage your sales markets according to criteria of your choice. Territory structure is based on a territory hierarchy.

The territory hierarchy is related to the organizational model of your company via the job position of the resource (employee) responsible.

The organizational model represents the internal view of your company. On the other hand, the territory hierarchy reflects the market view. Changes to the territory hierarchy occur more frequently than changes to the organizational chart. Your customer base can increase or decrease and territories must be resized or reallocated to accommodate this, to ensure that a representative has the appropriate workload.

Territory management provides the following functions:

- Territory hierarchy structure
- Position management
- Rule based selection for business accounts and items
- Territory validity periods
- Territory rule period ownership - indirect link between customer-item-resource (sales rep)
- Territory rule period representation - indirect link between customer-item-resource (sales rep)
- Unattended calculation for territory relationships (business accounts, items)
- Territory planning (CRM Pharma Industry)
- Territory administrative reports

## Position

Position defines a specific instance of a job with in your organization.

A position describes the following:

- Job title
- Owner position
- Representative position

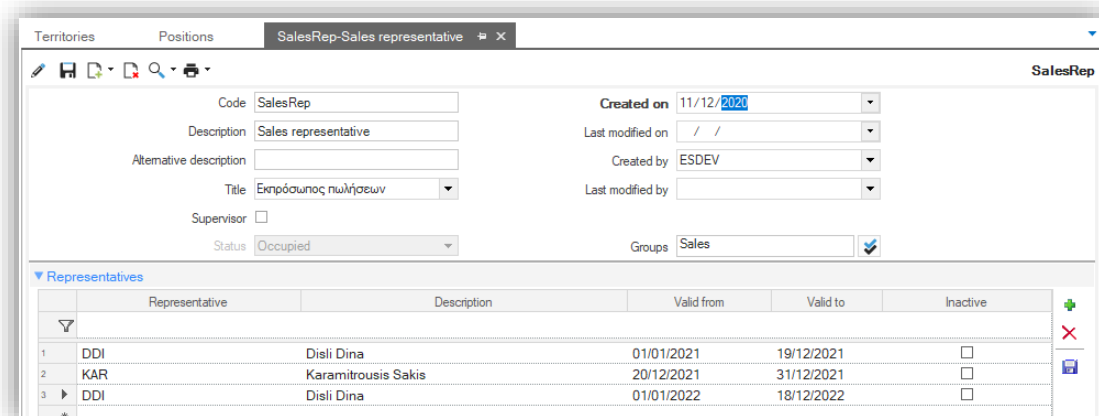
For example, you may define a position for a sales representative that is assigned to resource 'X' from 1/1/2020.

You may assign more than one resources to the same position for the same or overlapping period, however, this leads to the same assignment of business accounts and items.




### Example of assigning multiple representatives in a position

A job position is active all year long. Though the representative X will be not available during Christmas recession, so the representative Y will replace him/her during this period. So, three entries should be created as shown in the following screen capture.



Representative	Description	Valid from	Valid to	Inactive
1 DDI	Disli Dina	01/01/2021	19/12/2021	<input type="checkbox"/>
2 KAR	Karamitrousis Sakis	20/12/2021	31/12/2021	<input type="checkbox"/>
3 DDI	Disli Dina	01/01/2022	18/12/2022	<input type="checkbox"/>

## 1. Working with positions

To create or manage a position, you need to go through the [Menu: Sales > Territory management > Positions](#). On the toolbar placed on the right side of the property set list, click on the  'Insert new line' button. On the position form, the following should be filled out:

<i>Field name</i>	<i>Description</i>
<i>Basic Data</i>	
<i>Code</i>	<b>Mandatory</b> - The code of the position
<i>Description</i>	<b>Mandatory</b> - The description of the position
<i>Alternative description</i>	Optional - The alternative description of the position
<i>Title</i>	<b>Mandatory</b> - The title of the position
<i>Supervisor</i>	It defines if this is a supervising position or not
<i>Status</i>	The position status.
<i>Created on</i>	Creation date of the position. It is automatically filled out.
<i>Last modified on</i>	Modification date of the position. It is automatically filled out.
<i>Created by</i>	User who created this position
<i>Last modified by</i>	User who last modified this position
<i>Groups</i>	The groups of representatives
<i>Representatives</i>	
<i>Representative</i>	<b>Mandatory</b> – The representative of the position.
<i>Description</i>	<b>Mandatory</b> – Representative's description. It is automatically filled out when the representative is selected.
<i>Valid from</i>	<b>Mandatory</b> – The beginning of the period for which the representative occupies this position.
<i>Valid to</i>	<b>Mandatory</b> – The end of the period for which the representative occupies this position.
<i>Inactive</i>	It defines if the representative is active or not.



## **Rule set type & rule set**

A rule set defines set operations that allow the results of multiple queries to be combined into a single result set. Set operators include Union, Exception and Intersection. In the context of territory management, you may create:


- Business account rules
- Item rules

A rule may consist of one or more queries that are combined into a single set. A rule set allows you to define advanced business queries. For example, you need to define a business account ruleset, that includes all customers of zip code '17671' but you need to exclude two customers. You can do this by defining two query lines as follows

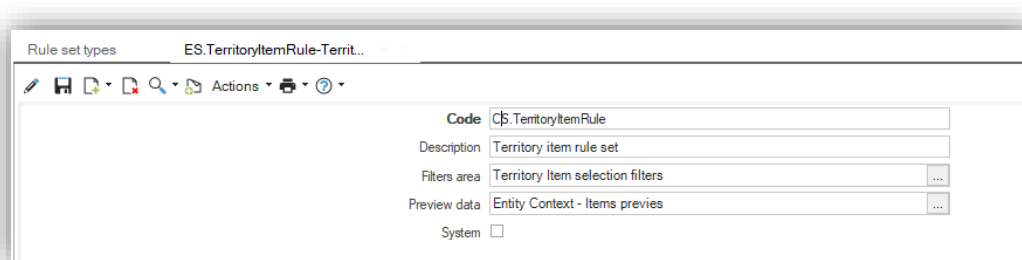
- 1st query Zip Code = '17671' except
- 2nd query Customer Code in '00001','00002'

Moreover, you may define rule sets without having to set default parameter values. The parameter values are defined during the creation of territory validity rule period. This allows you to keep rule definition at a minimum level.

## 2. Working with rule set types

By default, there are two system rule set types; Territory business account rule set (ES.TerritoryBARule) & territory item rule set (ES.TerritoryItemRule). To create or manage a rule set type, you need to go through the [Menu: Sales > Territory management > Rule set types](#). To manage a rule set type double-click on the selected rule set type. If you wish to create a new rule set, on the toolbar placed on the right side of the rule set type list, click on the  'Insert new line' button. On the rule set type form, the following should be filled out:

Field name	Description										
<i>Basic Data</i>											
<i>Code</i>	<b>Mandatory</b> - The code of the rule set type										
<i>Description</i>	Optional - The description of the rule set										
<i>Filters area</i>	<b>Mandatory</b> – By default, there are two filter areas, the <i>Territory Item selection filters</i> for the filters referring to item filters and <i>Territory Trade account selection filters</i> referring to trade account filters.										
<i>Preview data</i>	<b>Mandatory</b> – After defining the filter area, you need to define the view (scroller) which will be used for previewing the data of that type of rule set. You can choose between the views stored in the previously selected area. <table> <tr> <th colspan="2">System views by area</th></tr> <tr> <th>Area</th><th>View</th></tr> <tr> <td>Territory Item selection filters</td><td>Item</td></tr> <tr> <td>Territory Trade account selection filters</td><td>Customers-Addresses</td></tr> <tr> <td>Territory Trade account selection filters</td><td>Persons-Addresses</td></tr> </table>	System views by area		Area	View	Territory Item selection filters	Item	Territory Trade account selection filters	Customers-Addresses	Territory Trade account selection filters	Persons-Addresses
System views by area											
Area	View										
Territory Item selection filters	Item										
Territory Trade account selection filters	Customers-Addresses										
Territory Trade account selection filters	Persons-Addresses										
<i>System</i>	It defines if the rule set type is system or not.										




The screenshot shows the 'Rule set types' form for 'ES.TerritoryItemRule-Territ...'. The form includes a toolbar with icons for edit, save, delete, and other actions. The fields are as follows:

- Code:** ES.TerritoryItemRule
- Description:** Territory item rule set
- Filters area:** Territory Item selection filters
- Preview data:** Entity Context - Items previes
- System:** ☐


### Information


If you wish to use another view that differs from those available, it is highly recommended to change the existing one. If this is not possible, then create your view in the related section (e.g. if you wish to create a new item rule set filter you need to save this view in the Territory Item selection filters). Avoid creating new rule sets.

### 3. Working with rule sets



To create or manage a rule set, you need to go through the [Menu: Sales > Territory management > Rule sets](#). On the toolbar placed on the right side of the property set list, click on the  'Insert new line' button. On the rule set form, the following should be filled out:

<i>Field name</i>	<i>Description</i>
<i>Basic Data</i>	
<i>Code</i>	<b>Mandatory</b> - The code of the rule set
<i>Description</i>	Optional - The description of the rule set
<i>Type</i>	<b>Mandatory</b> – Two valid values; Territory business account rule set (ES.TerritoryBARule) & territory item rule set (ES.TerritoryItemRule)
<i>Status</i>	The status of the rule set by default is set as 'In processes. On about saving the rule set you will be able to change its status. The valid rule sets considered to be those with the value 'Active'.
<i>Created on</i>	Creation date of the rule set. It is automatically filled out.
<i>Last modified on</i>	Modification date of the rule set. It is automatically filled out.
<i>Created by</i>	User who created this rule set
<i>Last modified by</i>	User who last modified this rule set

To create the result set, by clicking on the  'Insert new' button, a filter designer is added. Firstly, define the item or business account filter you wish to work with. Secondly, the result set of the filter could be filtered out by setting values to the parameters of the filter. The filter parameters differ from filter to filter.

Additionally, you can combine the result set of the first filter with the result set of another filter. To do so, click on the  'Insert new' button to add a new filter and define which operator you wish to use.

Repeat the aforementioned process as many times as needed in order to design the result set you wish.

At any time during the designing process, you can preview the result set by clicking on the  'Preview' button. Finally, if you wish to redesign the query of a filter, you can click on the  'Design' button to open the scroller designer window.

#### Suggestion

It is highly recommended to create rule sets that will cover most of the need of your territories. You can differentiate the result set of a rule set of a specific hierarchy node and for a specific time period in the hierarchy. For further information, see [Manage validity periods](#) section.

## **Territory hierarchy & territory**

A territory hierarchy defines the structure of a territory. When you create a territory you need to select first the hierarchy that the system must follow for the structure of the territory.

Each level of a hierarchy defines the following:

- The business dimension of the segment
- The code of the segment
- Counter prefix
- Counter length

For example you may define a hierarchy with four levels

- Company
- Product category
- Region
- Sub region

The CRM Zero image proposes four different hierarchies. You may define also your hierarchies.

There is no restriction on the number of levels of a territory hierarchy, however, you should keep your territory structure as minimum as possible since it will be difficult to manage a structure with multiple levels.


A territory definition is based on a territory hierarchy. Each territory node consists of territory validity periods. A validity period defines the relationship between the selected business accounts and/or selected items and/or the supervising positions and/or representative positions for a specific time period. In this way, you define which representative is responsible to perform certain activities to the selected business accounts for specific items and/or which representative manages this territory node. For example, in some businesses, a representative is responsible to sell specific items to specific customers.

It is not mandatory for business accounts, items, supervising position and representative position to have been assigned to a validity period. Though, if business accounts are assigned to it, then you need to assign to it a representative position.

It is common at the inner levels of the territory hierarchy to set only the supervising position and not business accounts, items, representative position. On the other hand, at the lowest levels - leaf nodes of the territory hierarchy, it is common to set only business account rule and/or item rule and a representative position.


All of the above are thoroughly described in the following paragraphs.

## 4. Working with territory hierarchies

As previously mentioned the territory hierarchy defines a territory structure. There are four predefined territory hierarchies, though in case that these hierarchy territories are not compatible with your company's territory structure, you can create a new territory hierarchy by going through the [Sales > Territory management > Territory hierarchies](#) to the view the territory hierarchy list and click the  'Insert new' button on the toolbar placed on the right side. On the territory hierarchy form, the following should be filled out:

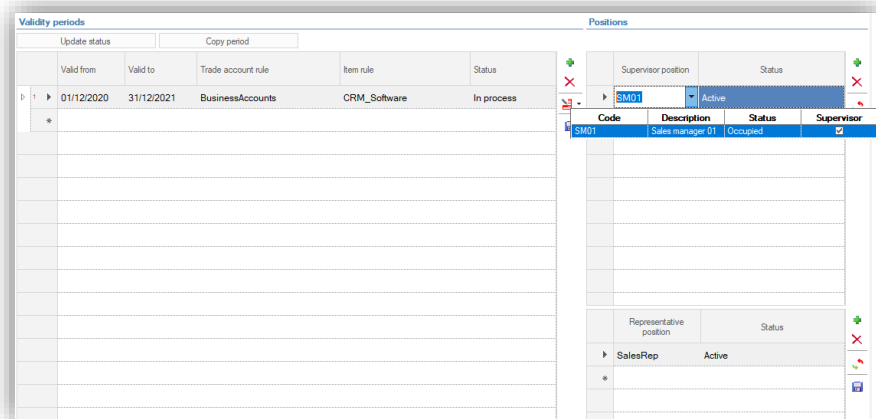
<b>Field name</b>	<b>Description</b>
<i>Basic Data</i>	
<i>Code</i>	<b>Mandatory</b> - The code of the territory hierarchy
<i>Description</i>	Optional - The description of the territory hierarchy
<i>Alternative description</i>	Optional - The alternative description of the territory hierarchy
<i>Groups</i>	Optional – Working groups that could be assigned to this territory hierarchy. This groups should be also assigned to the related positions.
<i>Created on</i>	Creation date of the territory hierarchy. It is automatically filled out.
<i>Last modified on</i>	Modification date of the territory hierarchy. It is automatically filled out.
<i>Created by</i>	User who created this territory hierarchy
<i>Last modified by</i>	User who last modified this territory hierarchy
<i>Levels</i>	
<i>Level</i>	<b>Mandatory</b> - The level in the territory hierarchy. It is an auto incremental number which is filled out automatically when you click on the Code field of the grid.
<i>Code</i>	<b>Mandatory</b> - The level code
<i>Description</i>	Optional – The level description
<i>Alternative description</i>	Optional – The level alternative description
<i>Counter prefix</i>	<b>Mandatory</b> - The prefix that will be assigned to the code of the territory node of this level. For detailed information, see <a href="#">Working with territories</a> section
<i>Number of digits in code</i>	<b>Mandatory</b> - The number of digits of the auto incremental number used as suffix that will be assigned to the code of the territory node of this level. For detailed information, see <a href="#">Working with territories</a> section

## 5. Working with territories

To create a new territory go through the [Sales > Territory management > Territories](#) to view the territory list and click the  'Insert new' button on the toolbar placed on the right side. The available territory hierarchies are shown in a dialog box and you need to select one of them which best fits to your needs.

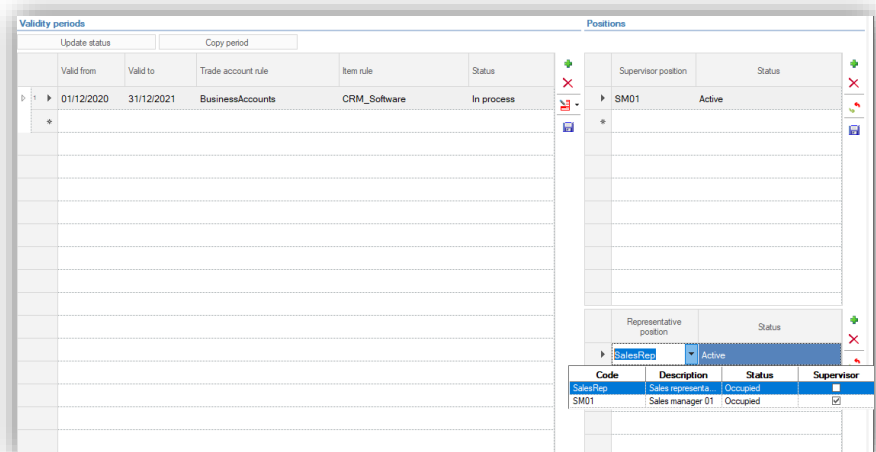
<i>Field name</i>	<i>Description</i>
<i>Basic Data</i>	
<i>Code</i>	<b>Mandatory</b> - It is automatically filled out, based on the selected territory hierarchy level
<i>Description</i>	<b>Mandatory</b> - The description of the territory
<i>Level</i>	<b>Mandatory</b> – It is automatically filled out, based on the selected territory hierarchy level
<i>Created on</i>	Creation date of the position. It is automatically filled out.
<i>Last modified on</i>	Modification date of the position. It is automatically filled out.
<i>Created by</i>	User who created this position
<i>Last modified by</i>	User who last modified this position
<i>Validity periods</i>	
<i>Valid from</i>	<b>Mandatory</b> – The beginning of the period of the hierarchy level. The beginning date of a period of each next level (successor) must not overlap the beginning and ending period of the previous level (predecessor)
<i>Valid to</i>	<b>Mandatory</b> – The end of the period the hierarchy level. The ending date of a period of each next level (successor) must not overlap the beginning and ending period of the previous level (predecessor)
<i>Trade account rule</i>	The trade account rule applied to this level for the specified validity period
<i>Item rule</i>	The item rule applied to this level for the specified validity period
<i>Status</i>	<p>The status of the validity period, by default is set as 'In processes. All valid validity periods considered to be those with 'Active' status – The status update is performed through specific action, see <a href="#">Assign supervising &amp; representative</a> position</p> <p>A supervisor and/or a representative could be assigned to a validity period. To assign a supervising position, click on the validity period you wish to be assigned to and then go to the positions section and assign the supervising position in the supervisor position field.</p>





Validity periods						Positions			
Update status		Copy period				Supervisor position		Status	
Valid from	Valid to	Trade account rule	Item rule	Status		Code	Description	Status	Supervisor
01/12/2020	31/12/2021	BusinessAccounts	CRM_Software	In process		SM01	Sales manager 01	Occupied	<input checked="" type="checkbox"/>
						Representative position		Status	
						SalesRep		Active	

To assign a representative position, click on the validity period you wish to be assigned to and then go to the positions section and assign the representative position in the representative position field.



Validity periods						Positions			
Update status		Copy period				Supervisor position		Status	
Valid from	Valid to	Trade account rule	Item rule	Status		Code	Description	Status	Supervisor
01/12/2020	31/12/2021	BusinessAccounts	CRM_Software	In process		SM01	Sales manager 01	Occupied	<input checked="" type="checkbox"/>
						Representative position		Status	
						SalesRep		Active	

Code	Description	Status	Supervisor
SalesRep	Sales representa...	Occupied	<input checked="" type="checkbox"/>
SM01	Sales manager 01	Occupied	<input checked="" type="checkbox"/>

### Suggestion

It is highly recommended to assign one supervising position and one representative position to each validity period. Otherwise, the same business accounts and/or items relationship will be created for the number of the assigned supervising positions and representative positions (e.g. if you have assigned 3 different representative positions then, the same business accounts and/or items relationships will be created for the 3 representative positions).

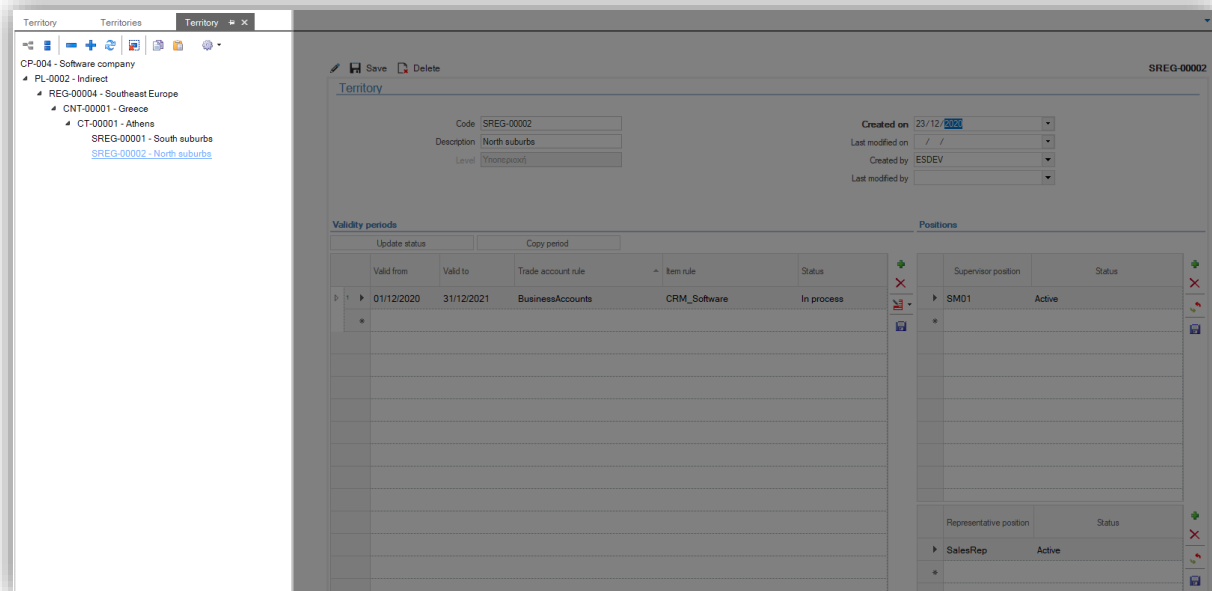
Update validity period status\_section.

<i>Supervisor Position</i>	
<i>Supervisor position</i>	The supervisor position – Drop down list that shows all the available valid supervising positions for this territory node
<i>Status</i>	The status of the supervising position
<i>Representative position</i>	
<i>Representative</i>	<b>Mandatory</b> – The position of representative – Drop down list that shows all the available valid positions for this territory node
<i>Status</i>	The status of the position

## 5.1 Manage territory hierarchy nodes

By default, the only level that is automatically inserted to the territory is the 1<sup>st</sup> level of the selected territory hierarchy.

At the top left part of the form, the toolbar for managing the territory levels is placed and on the left side of the form the territory hierarchy nodes are shown.




Valid from	Valid to	Trade account rule	Item rule	Status
01/12/2020	31/12/2021	BusinessAccounts	CRM_Software	In process


Supervisor position	Status
SM01	Active

Representative position	Status
SalesRep	Active


### 5.1.1 Add new nodes of next level

To add a new node of the next level, you need to click on the  button. A new node of the next level is added and you need to fill out the required fields based on the aforementioned instructions (see [Working with territories](#) section).


### 5.1.2 Add new nodes of the same level

To add a new node of the same level, you need to click on the  button. A new node of the same level is added and you need to fill out the required fields based on the aforementioned instructions (see [Working with territories](#) section).


### 5.1.3 Collapse nodes

To collapse the list of the nodes of a selected node, you need to select the node you wish to collapse and then click on the  button.


### 5.1.4 Expand nodes

To expand the list of the nodes of a selected node, you need to select the node you wish to expand and then click on the  button.



### 5.1.5 Refresh node list

To refresh the list of the nodes of a selected node, you need to select the node you wish to refresh and then click on the  button.

### 5.1.6 Delete node

To delete a selected node, you need to select the node you wish to delete and then click on the  button.


### 5.1.7 Copy – Paste node

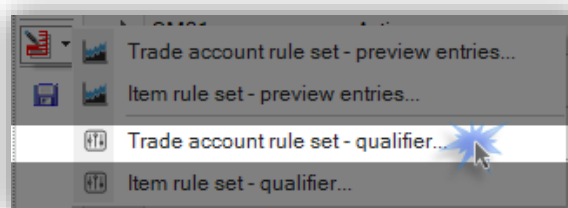
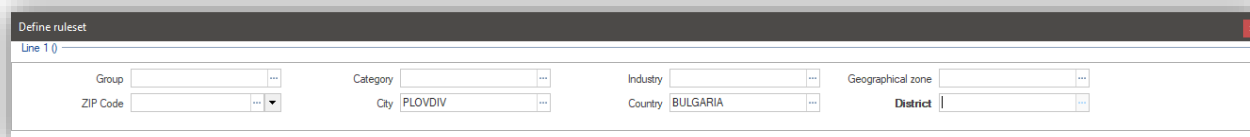
To copy and paste a selected node, you need to select the node you wish to copy and then click on the  button and then paste the copied node by clicking on the  button.

## 5.2 Manage validity periods

After inserting a territory hierarchy node and after filling out the required fields in the basic data section, you need to define at least one validity period. As previously mentioned, the **Valid from** and **Valid to** fields are mandatory. Additionally, you can define a business account rule set or/and an item rule set. A business account rule set and/or an item rule set need to be previously created. Though, you can still previews and change their content for a validity period through the available actions that will be thoroughly described in the following paragraphs.


### 5.2.1 Set trade account rule set qualifiers

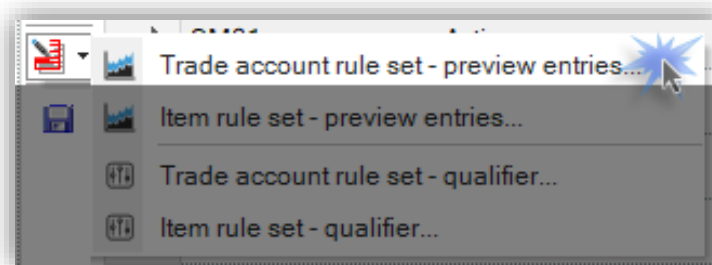
As previously mentioned, you can differentiate the rule set of the selected trade account rule set for a specific validity period by selecting the validity period line and then clicking on the  button. A list of actions is shown and you need to select the *Trade account rule set – qualifier...* action. Through this action you can set values to the parameters of the rule set in order to differentiate its result set.

Define ruleset							
Line 1 ()							
Group		Category		Industry		Geographical zone	
ZIP Code		City	PLOVDIV	Country	BULGARIA	District	

## 5.2.2 Preview trade account rule set

You can always preview the entries of a selected trade account rule set for a specific validity period by selecting the validity period line and then clicking on the  button. A list of actions is shown and you need to select the *Trade account rule set – preview entries...* action.




Trade accounts preview

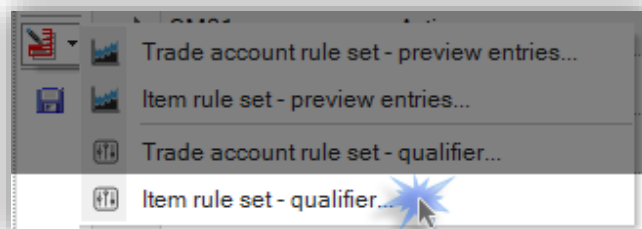
Trade accounts (135) Map

Customer code	Name	Contact	Address 1	ZIP Code	Area	City	District
	ADAMS SHOES		KNUAZA MILOSA	35250	Paraćin	Paraćin	Pomoravlje
	Affleck Ben			40001	AAPISAZ	KPANGA	AAPISA
	Agatha Kristie			57001	BEPUH	BEZIA/ONIKH	BEZIA/ONIKH
	ALFA WOOD S.A.		STRADA RADIN	40018	CLUJ-NAPOCA	Cluj-Napoca	Cluj
	ALFA WOOD S.A.		BPAHKO8 MOCT	11070	BEOGRAD (NOVI BEOGR)	BEOGRAD-NOVI BEOGR.	GRAD BEOGRAD
	Alfred James			10431	OMONIOIA	ADHNA	ATTIKH
	ALPHA BANK			55131	KALAMARIA	BEZIA/ONIKH	BEZIA/ONIKH
	ALPHA SATELLITE TELEVISION S.A.		str. Traian Vuza	38345	Ioaninca Banja	Rada	Rada
	ALTBRA S.A.		MILENTIJA POPONICA 1	23265	Kraevim	Zvenjani-grad	Srednje-baratski
	ANEX LINES S.A.		str. 9 Mai	315400	Lipova	Lipova	Arad
	Anthony Todd			57001	BEPUH	BEZIA/ONIKH	BEZIA/ONIKH
	ASTRAZENCA A.E.		str. Matei Basarab	240195	Auram Iancu	Ramnicu Valcea	Valcea
	AXEL ACCESSORIES S.A.		BPAHKO8 MOCT	11070	BEOGRAD (NOVI BEOGR)	BEOGRAD-NOVI BEOGR.	GRAD BEOGRAD
	Babian Nikola			10431	OMONIOIA	ADHNA	ATTIKH
	Bankov Nikolay		ulita "Ivan Boris"	1359	Sofia		
	Bardi Iris		R. Deshmoret 4 Skurtit	3-te	Tirana	Tirana	Tirane
	Begman Maria			57001	BEPUH	BEZIA/ONIKH	BEZIA/ONIKH
	Britton Chris			30001	AITONAKAPNANIAE	NEOKIRI	AITONAKAPNANIA
	Brown Stela		Sales Area	4-te	Pogradec	Pogradec	Pogradec
	Butler George			57001	BEPUH	BEZIA/ONIKH	BEZIA/ONIKH
	CALZEDONIA S.A.		str. Ofuz	37215	Raerj	Raerj	Ngarde
	Cannon Joe			10433	ITA BKTORPAZ	ADHNA	ATTIKH
	Cappelletti Joe			10431	OMONIOIA	ADHNA	ATTIKH
	Cinbar Sasa			57001	BEPUH	BEZIA/ONIKH	BEZIA/ONIKH
	Cooper Bradley			10431	OMONIOIA	ADHNA	ATTIKH


Print Print

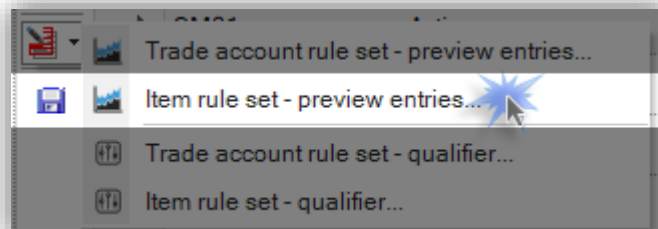
### 5.2.3 Set item rule set qualifiers

As previously mentioned, you can differentiate the rule set of the selected item rule set for a specific validity period by selecting the validity period line and then clicking on the  button. A list of actions is shown and you need to select the *Item rule set – qualifier...* action. Through this action you can set values to the parameters of the rule set in order to differentiate its result set.



### 5.2.4 Preview item rule set

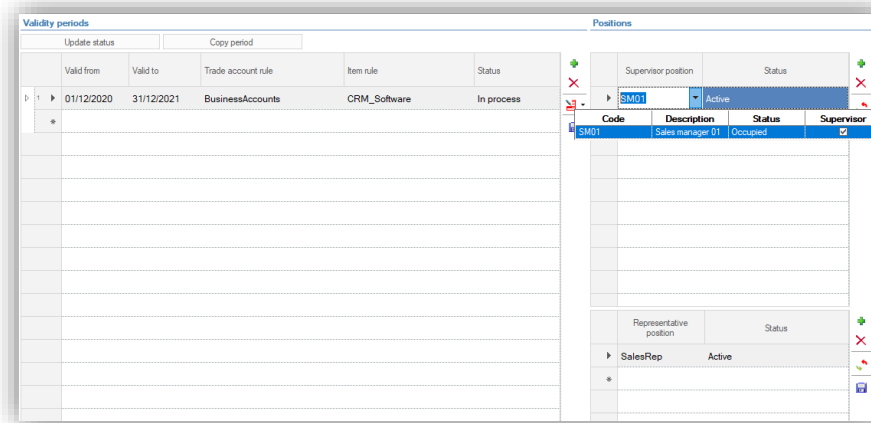
You can always preview the entries of a selected item rule set for a specific validity period by selecting the validity period line and then clicking on the  button. A list of actions is shown and you need to select the *Item rule set – preview entries...* action.



Items (22)					
Code	Description	Family	Group	Category	Sub-category
CRM-LIC-19998	CRM Additional Application Server	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-19999	CRM Additional User License	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10018	CRM Advanced Security	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10017	CRM Call Center Integration	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10019	CRM Development Tools	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10004	CRM Document Management	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-19996	CRM Extra Language Pack per Language	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10014	CRM Geographical Services	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10002	CRM Import/Export Tools	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10520	CRM Marketing	SOFTWARE	ES_CRM	03.CRM MARKETING	
CRM-LIC-10502	CRM Opportunity management	SOFTWARE	ES_CRM	02.CRM SALES	
CRM-LIC-10015	CRM Outlook Integration	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10006	CRM Replication Client / each	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10005	CRM Replication Server	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10500	CRM Sales Tasks Management	SOFTWARE	ES_CRM	02.CRM SALES	
CRM-LIC-10531	CRM Service Level Agreements (SLAs)	SOFTWARE	ES_CRM	04.CRM SERVICE	
CRM-LIC-10530	CRM Service management	SOFTWARE	ES_CRM	04.CRM SERVICE	
CRM-LIC-10016	CRM SMS Gateway	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10503	CRM Subscriptions Management	SOFTWARE	ES_CRM	02.CRM SALES	
CRM-LIC-10003	CRM Users / each	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10603	CRM Views - Report - OLAP & Graph Designer	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10000	Entersoft CRM Basic Functionality	SOFTWARE	ES_CRM	01.CRM BASIC	

### 5.2.5 Assign supervising & representative position

A supervisor and/or a representative could be assigned to a validity period. To assign a supervising position, click on the validity period you wish to be assigned to and then go to the positions section and assign the supervising position in the supervisor position field.

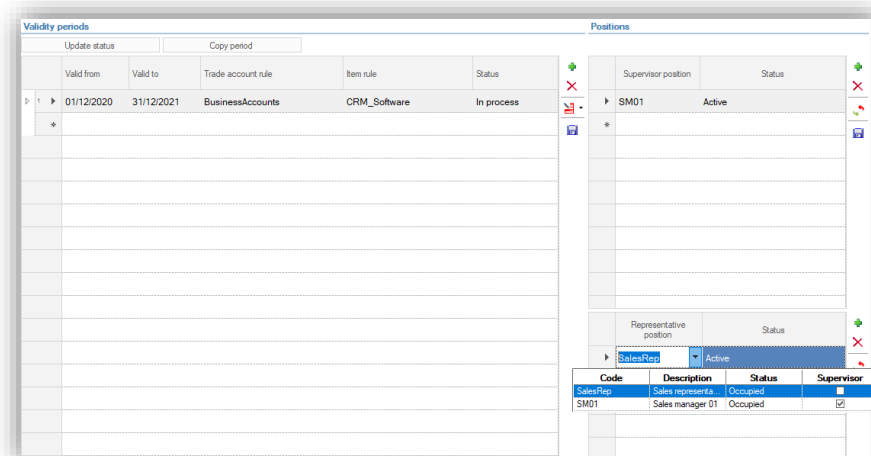


The screenshot shows the 'Validity periods' and 'Positions' interface. In the 'Validity periods' section, a validity period is selected with the following details:

Valid from	Valid to	Trade account rule	Item rule	Status
01/12/2020	31/12/2021	BusinessAccounts	CRM_Software	In process

In the 'Positions' section, the 'Supervisor position' is assigned to 'SM01' with a status of 'Active'. The 'Representative position' is currently empty.

To assign a representative position, click on the validity period you wish to be assigned to and then go to the positions section and assign the representative position in the representative position field.



The screenshot shows the 'Validity periods' and 'Positions' interface. In the 'Validity periods' section, a validity period is selected with the following details:


Valid from	Valid to	Trade account rule	Item rule	Status
01/12/2020	31/12/2021	BusinessAccounts	CRM_Software	In process

In the 'Positions' section, the 'Supervisor position' is assigned to 'SM01' with a status of 'Active'. The 'Representative position' is assigned to 'SalesRep' with a status of 'Active'.

#### Suggestion

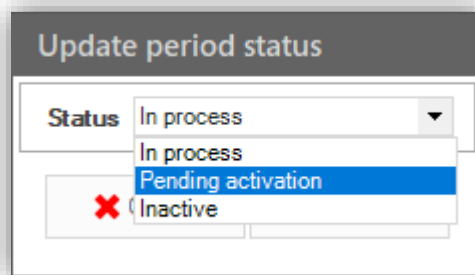
It is highly recommended to assign one supervising position and one representative position to each validity period. Otherwise, the same business accounts and/or items relationship will be created for the number of the assigned supervising positions and representative positions (e.g. if you have assigned 3 different representative positions then, the same business accounts and/or items relationships will be created for the 3 representative positions).

### 5.2.6 Update validity period status

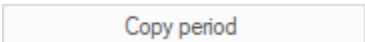
To update the status of a validity period, select the validity period line and click on the  button. By clicking on the 'Update status' button, a dialog box with a list of the available statuses is shown. The valid statuses are:

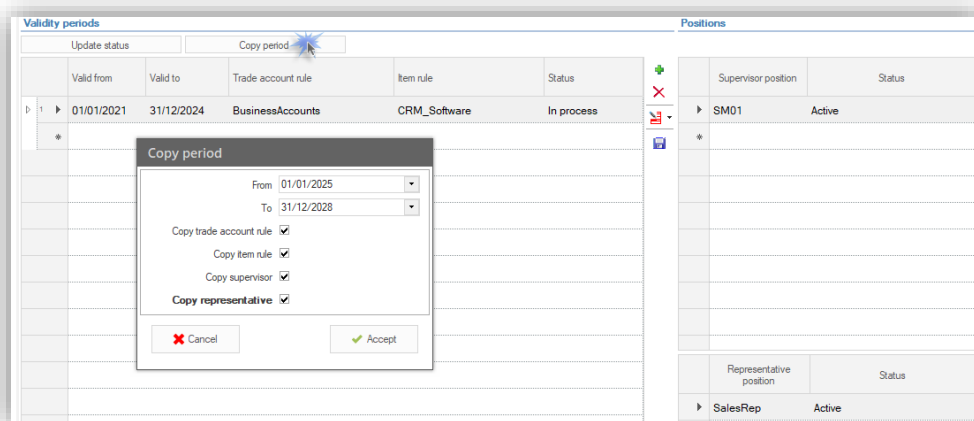
- In process - The default value set to the validity period
- Pending activation
- Active - It is only assigned by the system.
- Inactive

You need to select the status you wish to set to the validity period line and then click the  button.



### 5.2.7 Copy validity period

In case you wish to create a validity period using another one as template, you can select the validity period you wish to copy and click on the  button. In the dialog box shown, declare the validity starting and ending dates (From, To fields). By default, the system suggests the next available dates using the pattern of the selected validity period (e.g. the selected validity period starting date is 1/1/2021 and the ending date is 31/12/2024. Then the system suggest for the new validity period as starting date the 1/1/2025 and ending date the 31/12/2028). In addition, you can define if you wish to copy the business account rule set, item rule set, supervising position, representative position using the check boxes.





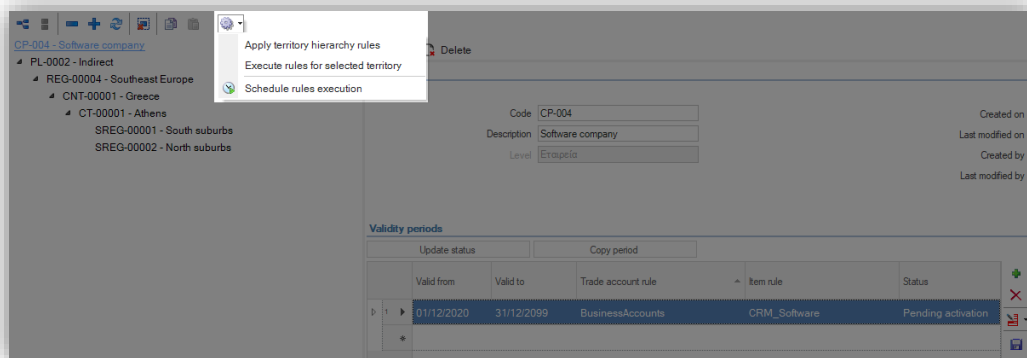
### 5.3 Process territory relations

To generate business account relations & item relations you need to process territory nodes that have validity periods with status 'Pending Activation' or 'Active'.

- **Apply territory hierarchy rules**  
Process all territory nodes.
- **Execute rules for the selected territory**  
Process the selected territory node.
- **Schedule rules execution**

Use this action to set unattended processing based on a scheduled job to process all territory nodes.

The above actions can be performed through the  button placed at the top left part of the form.



The screenshot shows a web application interface for territory management. On the left, there is a tree view of territory nodes. The main area displays details for a selected territory (CP-004 - Software company). A context menu is open over the 'Apply territory hierarchy rules' button, showing three options: 'Apply territory hierarchy rules', 'Execute rules for selected territory', and 'Schedule rules execution'.

**Territory Hierarchy:**

- CP-004 - Software company
  - PL-0002 - Indirect
    - REG-00004 - Southeast Europe
      - CNT-00001 - Greece
        - CT-00001 - Athens
          - SREG-00001 - South suburbs
          - SREG-00002 - North suburbs

**Territory Details:**

Code	CP-004
Description	Software company
Level	Entreprise

**Validity periods:**

Update status		Copy period				
Valid from	Valid to	Trade account rule	Item rule	Status		
01/12/2020	31/12/2099	BusinessAccounts	CRM_Software	Pending activation		

## **Administrative lists & reports**

## 6. Administrative lists

### 6.1 Positions

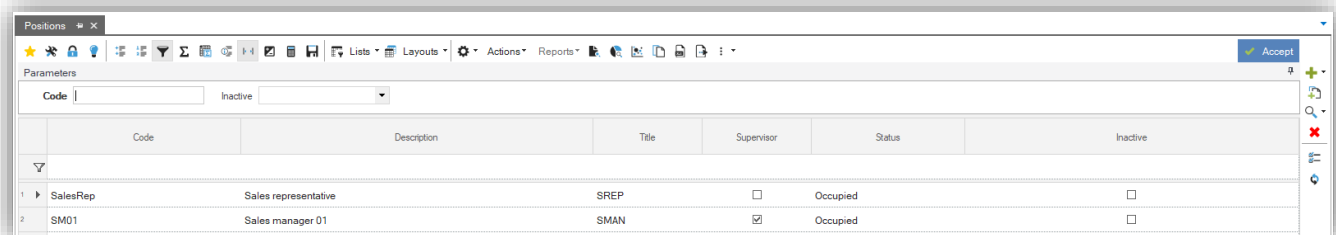
This report is used for getting informed about the positions created and the representatives who are assigned to them.

To access this report go to Menu: [Sales > Territory management > Positions](#).

#### **Field name**      **Description**

<i>Parameters</i>	
<i>Code</i>	Optional - The position's code.
<i>Inactive</i>	Optional
Valid values	
Yes	The positions are inactive
No	The positions are active


<i>Columns</i>	
<i>Code</i>	The position code.
<i>Description</i>	The position description.
<i>Title</i>	The position title
<i>Supervisor</i>	Indication that shows if the position is supervising or not.
<i>Status</i>	The position's status.
<i>Inactive</i>	Indication that shows if the position is active or not.

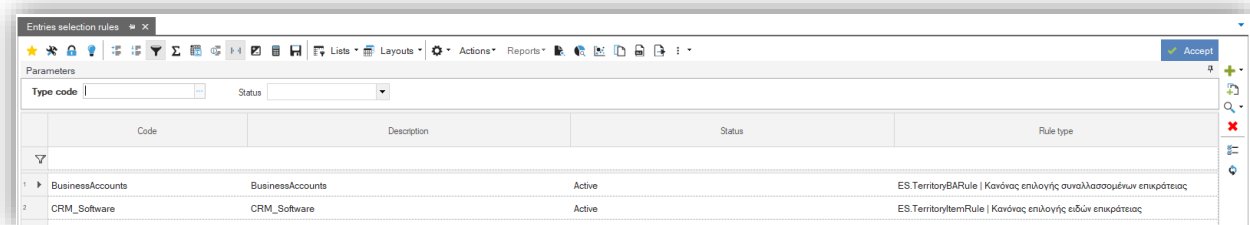


Positions						
Parameters						
Code	Inactive					
Code	Description	Title	Supervisor	Status	Inactive	
1 SalesRep	Sales representative	SREP	<input type="checkbox"/>	Occupied	<input type="checkbox"/>	
2 SM01	Sales manager 01	SMAN	<input checked="" type="checkbox"/>	Occupied	<input type="checkbox"/>	

## 6.2 Entry rule set

This report is used for getting informed about the entry rule sets. To access this report go to Menu: [Sales > Territory management > Entry rule sets](#).

<i>Field name</i>	<i>Description</i>
<i>Parameters</i>	
<i>Type code</i>	Optional - The entry rule set type. By clicking on the  button, you can search through the available entry rule set types and select the rule set type code from the list.
<i>Status</i>	Optional - Multiple choice list
	Valid values
	All
	In process
	Active
	Inactive
<i>Columns</i>	
<i>Code</i>	The rule set code.
<i>Description</i>	The rule set description.
<i>Status</i>	The rule set status.
<i>Rule type</i>	The rule set type.

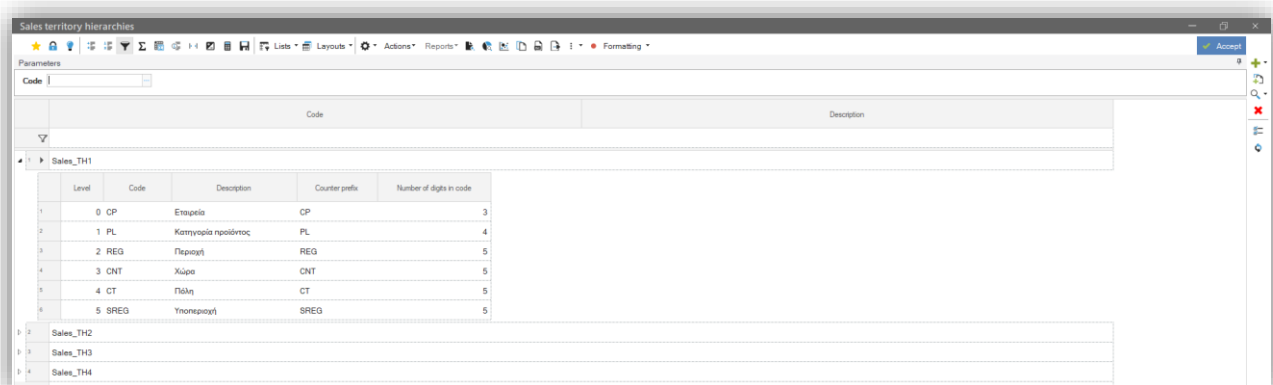


	Code	Description	Status	Rule type
1	BusinessAccounts	BusinessAccounts	Active	ES.TerritoryBARule   Κανόνας επιλογής συναλλαγασμένων επικράτειας
2	CRM_Software	CRM_Software	Active	ES.TerritoryItemRule   Κανόνας επιλογής ειδών επικράτειας

### 6.3 Sales territory hierarchies

This report is used for getting informed about the sales territory hierarchies and the related levels. To access this report go to Menu: [Sales > Territory management > Sales territory hierarchies](#).

<i>Field name</i>	<i>Description</i>
<i>Parameter</i>	
<i>Code</i>	Optional - The sales hierarchy code. By clicking on the <input type="text"/> button, you can search through the available hierarchies and select the hierarchy code from the list.
<i>1<sup>st</sup> level</i>	
<i>Columns</i>	
<i>Code</i>	The sales hierarchy code.
<i>Description</i>	The sales hierarchy description
<i>2<sup>nd</sup> level</i>	
<i>Columns</i>	
<i>Level</i>	The level of the hierarchy node.
<i>Code</i>	The code of the hierarchy node.
<i>Description</i>	The description of the hierarchy node.
<i>Counter prefix</i>	The prefix that will be assigned to the code of the territory node of this level.
<i>Number of digits in code</i>	The number of digits of the auto incremental number used as suffix that will be assigned to the code of the territory node of this level.



Level	Code	Description	Counter prefix	Number of digits in code
0	CP	Εταιρεία	CP	3
1	PL	Κατηγορία προϊόντος	PL	4
2	REG	Περιοχή	REG	5
3	CNT	Χώρα	CNT	5
4	CT	Πόλη	CT	5
5	SREG	Υποπεριοχή	SREG	5

Sales\_TH2

Sales\_TH3

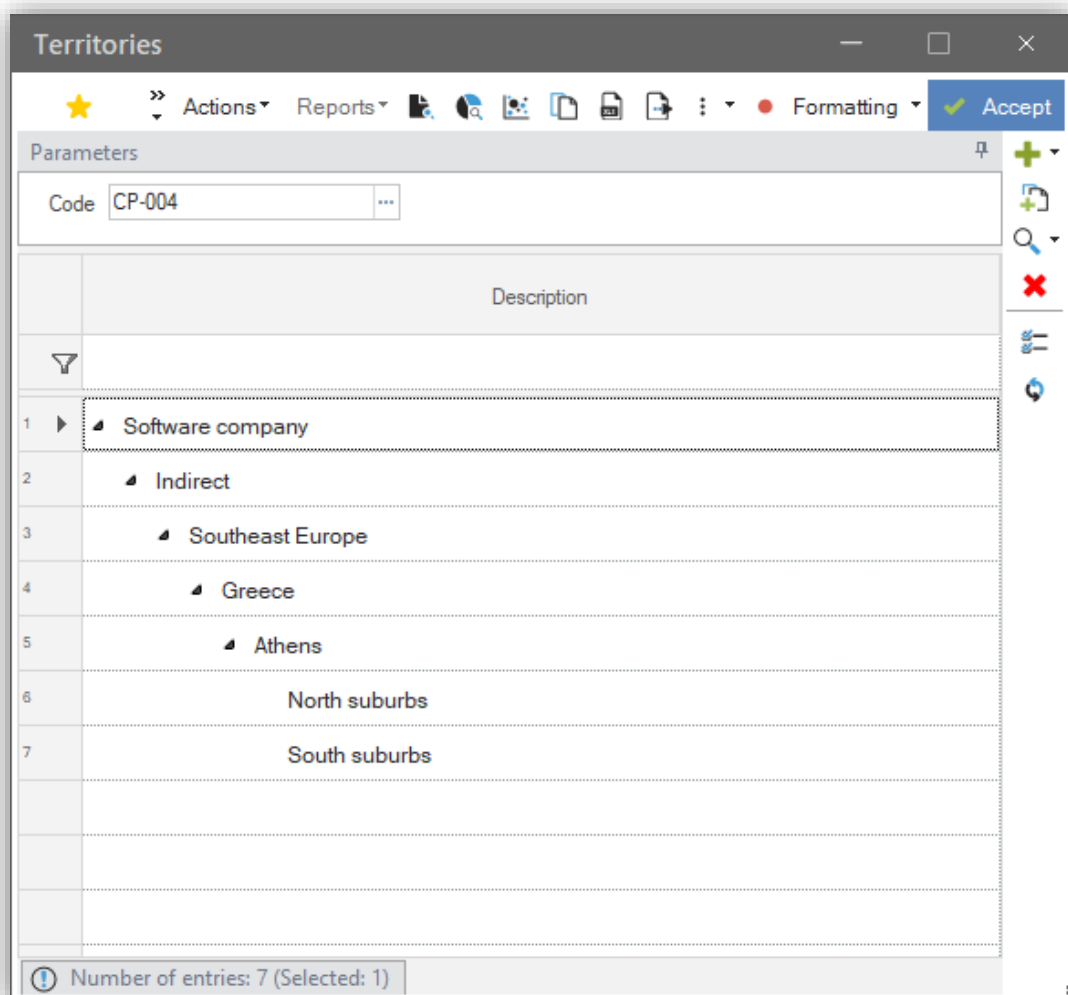
Sales\_TH4

## 6.4 Territories

This report is used for getting informed about the sales territories and the related nodes. This is a hierarchical report showing the territory structure. To access this report go to [Menu: Sales > Territory management > Territories](#).

### Field name      Description

Parameter	
Code	Optional - The sales territory code. By clicking on the <input type="text"/> button, you can search through the available territories and select the territory code from the list.
Column	
Description	The sales territory description.



The screenshot shows the 'Territories' report window. At the top, there's a title bar 'Territories' and a toolbar with icons for Actions, Reports, and Formatting, along with an 'Accept' button. Below the toolbar is a 'Parameters' section with a 'Code' field containing 'CP-004' and a search icon. The main area is a table with a 'Description' column. The table shows a hierarchical structure of territories: 'Software company' (selected), 'Indirect', 'Southeast Europe', 'Greece', 'Athens', 'North suburbs', and 'South suburbs'. A status bar at the bottom indicates 'Number of entries: 7 (Selected: 1)'.

	Description
1	Software company
2	Indirect
3	Southeast Europe
4	Greece
5	Athens
6	North suburbs
7	South suburbs

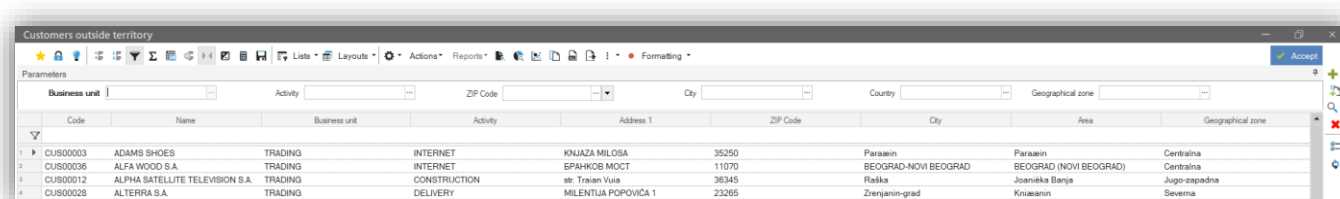
Number of entries: 7 (Selected: 1)

## 7. Administrative reports

### 7.1 Customers with no territory

This report is used for getting informed about the customers who are **not** assigned to any territory through a trade account rule set. To access this report go to [Menu: Sales > Territory management > Reports > Customers with no territory](#).

Field name	Description
<b>Parameters</b>	
<i>Business unit</i>	Optional - The business unit of the customers. By clicking on the <input type="button" value="..."/> button, you can search through the available business units and select business unit code(s) from the list.
<i>Activity</i>	Optional - The activity of the customers. By clicking on the <input type="button" value="..."/> button, you can search through the available activities and select activity code(s) from the list.
<i>Zip code</i>	Optional - The ZIP code of the customers' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available ZIP codes and select ZIP code(s) from the list.
<i>City</i>	Optional - The city of the customers' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available city codes and select city code(s) from the list.
<i>Country</i>	Optional - The country of the customers' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available country codes and select country code(s) from the list.
<i>Geographical zone</i>	Optional - The geographical zone of the customers' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available geographical zone codes and select geographical zone code(s) from the list.
<b>Columns</b>	
<i>Code</i>	The customer code.
<i>Name</i>	The customer name.
<i>Business unit</i>	The customer's business unit.
<i>Activity</i>	The customer's activity.
<i>Address 1</i>	The customer's address.
<i>ZIP code</i>	The customer's address ZIP code.
<i>City</i>	The customer's city.
<i>Area</i>	The customer's area.
<i>Geographical zone</i>	The customer's geographical zone.

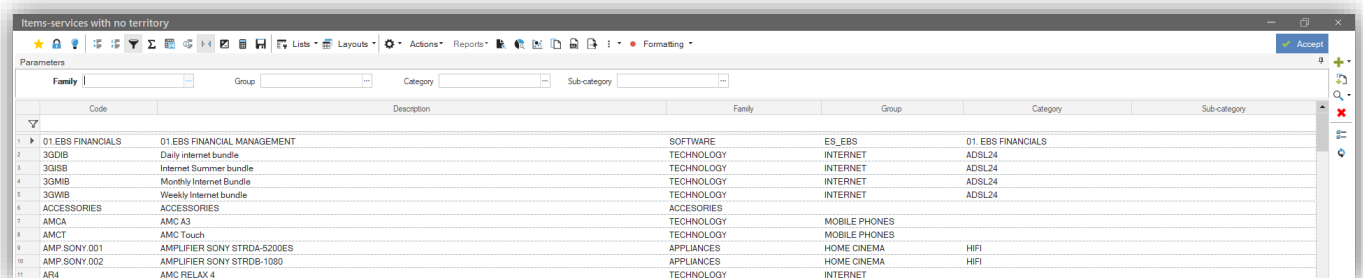


Code	Name	Business unit	Activity	Address 1	ZIP Code	City	Area	Geographical zone
CUS00003	ADAMS SHOES	TRADING	INTERNET	KNJAZA MILOSA	35250	Paraćin	Paraćin	Centralna
CUS00036	ALFA WOOD S.A.	TRADING	INTERNET	SPAH-KOB MOCT	11070	BEOGRAD-NOVI BEOGRAD	BEOGRAD (NOVI BEOGRAD)	Centralna
CUS00012	ALPHA SATELLITE TELEVISION S.A.	TRADING	CONSTRUCTION	str. Traian Vuia	36345	Radika	Joanika Banja	Jugo-zapadna
CUS00028	ALTERRA S.A.	TRADING	DELIVERY	MILENTIJA POPOVIĆA 1	23205	Zrenjanin-grad	Knaevanin	Severna

## 7.2 Items – Services with no territory

This report is used for getting informed about the items-services that are **not** assigned to any territory through an item rule set. To access this report go to [Menu: Sales > Territory management > Reports > Items – Services with no territory](#).

Parameters	
<b>Field name</b>	<b>Description</b>
<i>Family</i>	Optional - The family of the item-service. By clicking on the <input type="button" value="..."/> button, you can search through the available families and select family code(s) from the list.
<i>Group</i>	Optional - The group of the item-service. By clicking on the <input type="button" value="..."/> button, you can search through the available groups and select group code(s) from the list.
<i>Category</i>	Optional - The category of the item-service. By clicking on the <input type="button" value="..."/> button, you can search through the available categories and select category code(s) from the list.
<i>Sub-category</i>	Optional - The sub-category of the item-service. By clicking on the <input type="button" value="..."/> button, you can search through the available sub-category and select sub-category code(s) from the list.
Columns	
<i>Code</i>	The item-service code.
<i>Description</i>	The item-service description.
<i>Family</i>	The item-service family.
<i>Group</i>	The item-service group.
<i>Category</i>	The item-service category.
<i>Sub-category</i>	The item-service sub-category.



Code	Description	Family	Group	Category	Sub-category
01	01 EBS FINANCIALS	01 EBS FINANCIAL MANAGEMENT	ES_EBS	01 EBS FINANCIALS	
2	3QDIB	Daily internet bundle	TECHNOLOGY	INTERNET	ADSL24
3	3QISB	Internet Summer bundle	TECHNOLOGY	INTERNET	ADSL24
4	3QMIB	Monthly Internet Bundle	TECHNOLOGY	INTERNET	ADSL24
5	3QWIB	Weekly Internet bundle	TECHNOLOGY	INTERNET	ADSL24
6	ACCESSORIES	ACCESSORIES			
7	AMCA	AMC A3	TECHNOLOGY	MOBILE PHONES	
8	AMCT	AMC Touch	TECHNOLOGY	MOBILE PHONES	
9	AMP SONY 001	AMPLIFIER SONY STRDA-5200ES	APPLIANCES	HOME CINEMA	HIFI
10	AMP SONY 002	AMPLIFIER SONY STRDB-1080	APPLIANCES	HOME CINEMA	HIFI
11	AR4	AMC RELAX 4	TECHNOLOGY	INTERNET	



### 7.3 Persons with no territory

This report is used for getting informed about the persons who are **not** assigned to any territory through the related rule set. To access this report go to [Menu: Sales > Territory management > Reports > Persons with no territory](#).

<i>Field name</i>	<i>Description</i>
<i>Parameters</i>	
<i>Group</i>	Optional - The group of the persons. By clicking on the <input type="text"/> button, you can search through the available groups and select group code(s) from the list.
<i>Category</i>	Optional - The category of the persons. By clicking on the <input type="text"/> button, you can search through the available categories and select category code(s) from the list.
<i>Industry</i>	Optional - The industry of the persons. By clicking on the <input type="text"/> button, you can search through the available industries and select industry code(s) from the list.
<i>Zip code</i>	Optional - The ZIP code of the persons' addresses. By clicking on the <input type="text"/> button, you can search through the available ZIP codes and select ZIP code(s) from the list.
<i>City</i>	Optional - The city of the persons' addresses. By clicking on the <input type="text"/> button, you can search through the available city codes and select city code(s) from the list.
<i>District</i>	Optional - The district of the persons' addresses. By clicking on the <input type="text"/> button, you can search through the available district codes and select district code(s) from the list.
<i>Geographical zone</i>	Optional - The geographical zone of the persons' addresses. By clicking on the <input type="text"/> button, you can search through the available geographical zone codes and select geographical zone code(s) from the list.
<i>Country</i>	Optional - The country of the persons' addresses. By clicking on the <input type="text"/> button, you can search through the available country codes and select country code(s) from the list.
<i>Columns</i>	
<i>Code</i>	The person code.
<i>Name</i>	The person name.
<i>Group</i>	The person's group.
<i>Industry</i>	The person's industry.
<i>Address 1</i>	The person's address.
<i>ZIP code</i>	The person's address ZIP code.
<i>City</i>	The person's city.
<i>Area</i>	The person's area.
<i>District</i>	The person's district.
<i>Geographical zone</i>	The customer's geographical zone.

## 7.4 Business addresses with no territory

This report is used for getting informed about the business account addresses that are **not** assigned to any territory through the related rule set. To access this report go to [Menu: Sales > Territory management > Reports > Business addresses with no territory](#).

<i>Field name</i>	<i>Description</i>
<i>Parameters</i>	
<i>Zip code</i>	Optional - The ZIP code of the trade accounts' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available ZIP codes and select ZIP code(s) from the list.
<i>City</i>	Optional - The city of the trade accounts' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available city codes and select city code(s) from the list.
<i>Geographical zone</i>	Optional - The geographical zone of the trade accounts' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available geographical zone codes and select geographical zone code(s) from the list.
<i>District</i>	Optional - The district of the trade accounts' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available district codes and select district code(s) from the list.
<i>Country</i>	Optional - The country of the trade accounts' addresses. By clicking on the <input type="button" value="..."/> button, you can search through the available country codes and select country code(s) from the list.
<i>Columns</i>	
<i>Address code</i>	The address code.
<i>Description</i>	The address description.
<i>Person</i>	The address' person.
<i>Address 1</i>	The address.
<i>ZIP code</i>	The address ZIP code.
<i>City</i>	The city.
<i>Area</i>	The area.
<i>Geographical zone</i>	The geographical zone.
<i>District</i>	The district.

## 7.5 Customers assigned to multiple territories

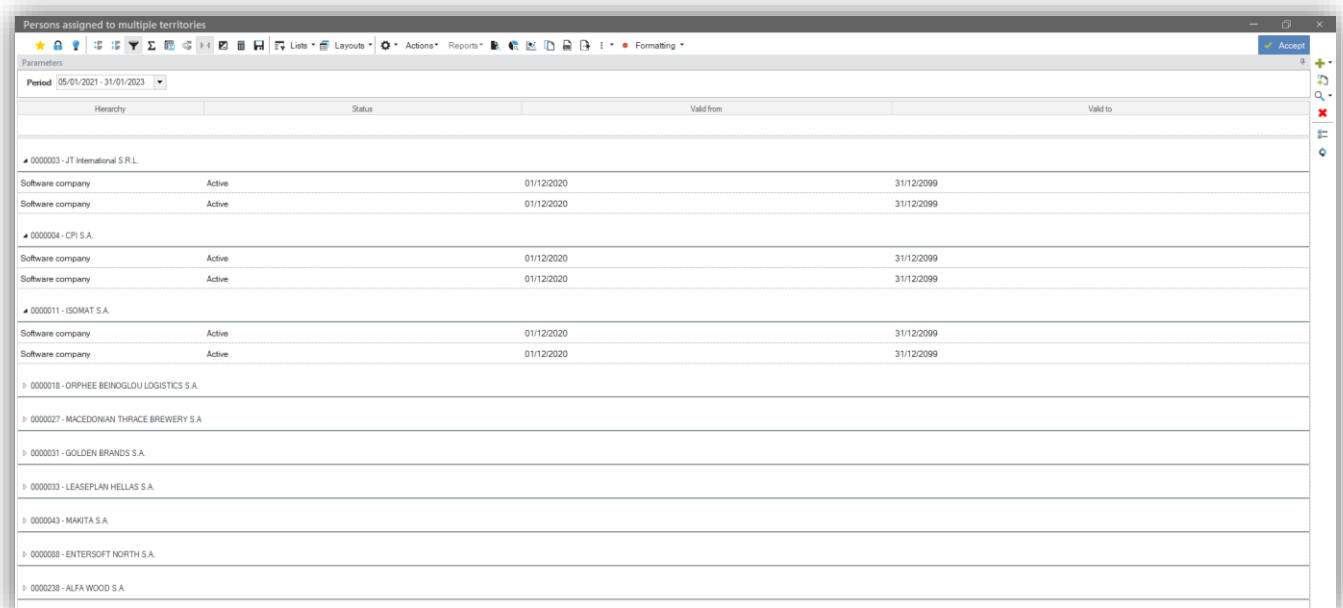
This report is used for getting informed about the customers who are assigned to multiple territories through a trade account rule set. To access this report go to [Menu: Sales > Territory management > Reports > Customers assigned to multiple territories](#).

<i>Field name</i>	<i>Description</i>
<i>Parameter</i>	
<i>Period</i>	<b>Mandatory</b> - The time period in order to search for the corresponding validity periods.
<i>Columns</i>	
<i>Hierarchy</i>	The territory hierarchy.
<i>Status</i>	The status of the hierarchy node.
<i>Valid from</i>	The beginning of the hierarchy node validity period.
<i>Valid to</i>	The end of the hierarchy node validity period.

## 7.6 Persons assigned to multiple territories

This report is used for getting informed about the persons who are assigned to multiple territories through a trade account rule set. To access this report go to [Menu: Sales > Territory management > Reports > Persons assigned to multiple territories](#).

<i>Field name</i>	<i>Description</i>
<i>Parameter</i>	
<i>Period</i>	<b>Mandatory</b> - The time period in order to search for the corresponding validity periods.
<i>Columns</i>	
<i>Hierarchy</i>	The territory hierarchy.
<i>Status</i>	The status of the hierarchy node.
<i>Valid from</i>	The beginning of the hierarchy node validity period.
<i>Valid to</i>	The end of the hierarchy node validity period.



Hierarchy	Status	Valid from	Valid to
0000003 - JT International S.R.L.			
Software company	Active	01/12/2020	31/12/2099
Software company	Active	01/12/2020	31/12/2099
0000004 - CFI S.A.			
Software company	Active	01/12/2020	31/12/2099
Software company	Active	01/12/2020	31/12/2099
0000111 - ISOMAT S.A.			
Software company	Active	01/12/2020	31/12/2099
Software company	Active	01/12/2020	31/12/2099
0000018 - ORPHEE BEINGLOU LOGISTICS S.A.			
0000027 - MACEDONIAN THRACE BREWERY S.A.			
0000031 - GOLDEN BRANDS S.A.			
0000033 - LEASEPLAN HELLAS S.A.			
0000043 - MAKITA S.A.			
0000088 - ENTERSOFT NORTH S.A.			
0000238 - ALFA WOOD S.A.			

## 7.7 Business addresses assigned to multiple territories

This report is used for getting informed about the business addresses that are assigned to multiple territories through a trade account rule set. To access this report go to [Menu: Sales > Territory management > Reports > Business addresses assigned to multiple territories](#).

<i>Field name</i>	<i>Description</i>
<i>Parameter</i>	
<i>Period</i>	<b>Mandatory</b> - The time period in order to search for the corresponding validity periods.
<i>Columns</i>	
<i>Territory</i>	The territory.
<i>POS code</i>	The POS code.
<i>Address</i>	The address.
<i>ZIP code</i>	The address ZIP code.
<i>City</i>	The city.
<i>District</i>	The district.
<i>Status</i>	The status of the hierarchy node.
<i>Valid from</i>	The beginning of the hierarchy node validity period.
<i>Valid to</i>	The end of the hierarchy node validity period.

## 7.8 Territory - Customers history log

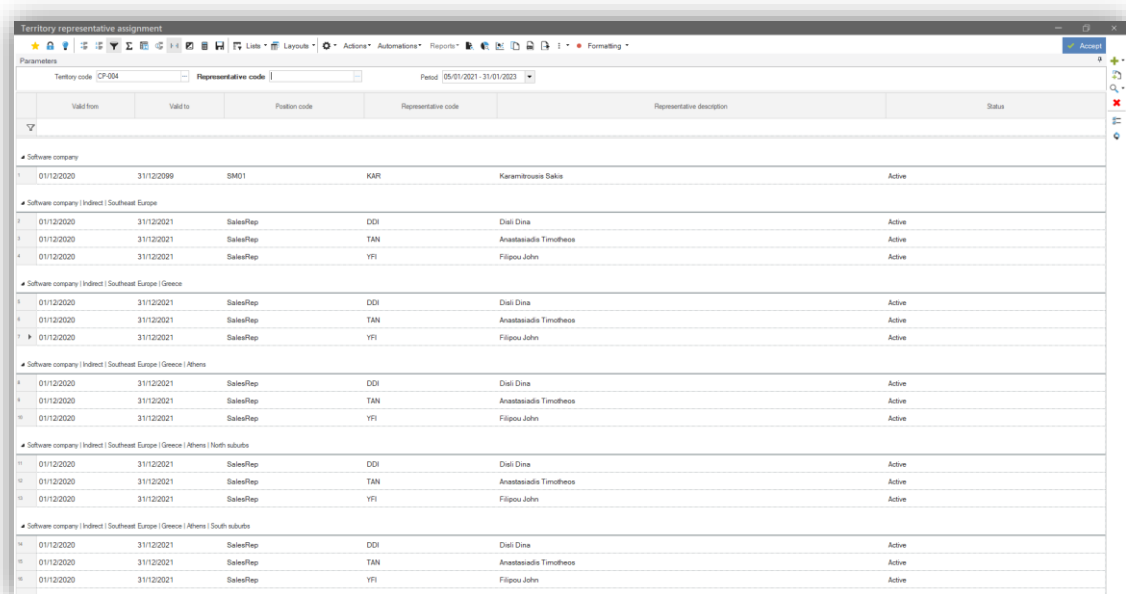
This report is used for getting informed about the changes applied to the business account rule set of a territory rule period. To access this report go to [Menu: Sales > Territory management > Reports > Territory - Customers history log](#).

<b>Field name</b>	<b>Description</b>
<i>Parameter</i>	
<i>Territory</i>	The territory code. By clicking on the <input type="button" value="..."/> button, you can search through the available territory codes and select the desired values from the list.
<i>Period</i>	The time period in order to search for the corresponding validity periods.
<i>Status</i>	The territory status.
<i>Columns</i>	
<i>Territory</i>	The territory.
<i>Person code</i>	The person's code.
<i>Person</i>	The person's name.
<i>Customer code</i>	The customer's code.
<i>Customer</i>	The customer's name.
<i>Address code</i>	The address code.
<i>Address</i>	The description of the address.
<i>ZIP code</i>	The address ZIP code.
<i>City</i>	The city.
<i>Area</i>	The area.
<i>Geographical zone</i>	The geographical zone.

## 7.9 Territory representative assignment

This report is used for getting informed about the allocation of the representatives to the territories. To access this report go to [Menu: Sales > Territory management > Reports > Territory representative assignment](#).

Field name	Description
<i>Parameter</i>	
<i>Territory code</i>	The territory code. By clicking on the <input type="text"/> button, you can search through the available territory codes and select the desired values from the list.
<i>Representative code</i>	The representative code. By clicking on the <input type="text"/> button, you can search through the available representative codes and select the desired values from the list.
<i>Period</i>	The time period in order to search for the corresponding validity periods.
<i>Columns</i>	
<i>Valid from</i>	The beginning of the hierarchy node validity period.
<i>Valid to</i>	The end of the hierarchy node validity period.
<i>Position code</i>	The position code.
<i>Representative code</i>	The representative's code.
<i>Representative description</i>	The representative's description
<i>Status</i>	The status of the hierarchy node.



The screenshot shows the 'Territory representative assignment' report interface. It includes a toolbar with various icons for navigation and actions. The main area displays a table with columns: Valid from, Valid to, Position code, Representative code, Representative description, and Status. The data is organized into a hierarchical structure, starting with 'Software company' and branching into 'Indirect', 'Southeast Europe', 'Greece', 'Athens', and 'South suburbs'. Each level shows a list of representatives with their respective validity periods and status.

	Valid from	Valid to	Position code	Representative code	Representative description	Status
Software company	01/12/2020	31/12/2021	SM01	KAR	Karambousis Sakis	Active
Software company (Indirect) Southeast Europe	01/12/2020	31/12/2021	SalesRep	DDI	Deli Dina	Active
Software company (Indirect) Southeast Europe	01/12/2020	31/12/2021	SalesRep	TAN	Anastasiadis Timotheos	Active
Software company (Indirect) Southeast Europe	01/12/2020	31/12/2021	SalesRep	YFI	Filipou John	Active
Software company (Indirect) Southeast Europe (Greece)	01/12/2020	31/12/2021	SalesRep	DDI	Deli Dina	Active
Software company (Indirect) Southeast Europe (Greece)	01/12/2020	31/12/2021	SalesRep	TAN	Anastasiadis Timotheos	Active
Software company (Indirect) Southeast Europe (Greece)	01/12/2020	31/12/2021	SalesRep	YFI	Filipou John	Active
Software company (Indirect) Southeast Europe (Greece) Athens	01/12/2020	31/12/2021	SalesRep	DDI	Deli Dina	Active
Software company (Indirect) Southeast Europe (Greece) Athens	01/12/2020	31/12/2021	SalesRep	TAN	Anastasiadis Timotheos	Active
Software company (Indirect) Southeast Europe (Greece) Athens	01/12/2020	31/12/2021	SalesRep	YFI	Filipou John	Active
Software company (Indirect) Southeast Europe (Greece) Athens South suburbs	01/12/2020	31/12/2021	SalesRep	DDI	Deli Dina	Active
Software company (Indirect) Southeast Europe (Greece) Athens South suburbs	01/12/2020	31/12/2021	SalesRep	TAN	Anastasiadis Timotheos	Active
Software company (Indirect) Southeast Europe (Greece) Athens South suburbs	01/12/2020	31/12/2021	SalesRep	YFI	Filipou John	Active

## 7.10 Territory information

This report is used for getting informed about a territory. To access this report go to [Menu: Sales > Territory management > Reports > Territory information](#).

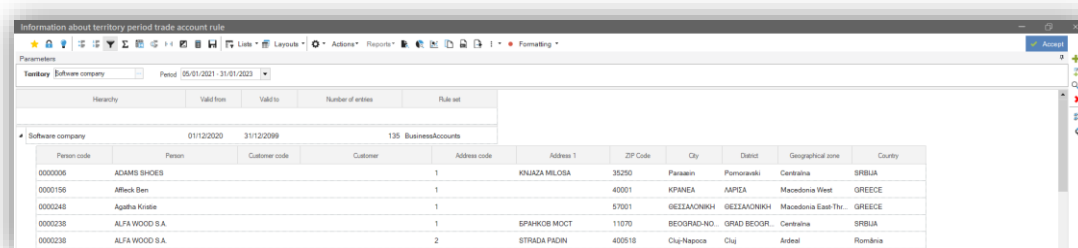
<i>Field name</i>	<i>Description</i>
<i>Parameter</i>	
<i>Territory</i>	The territory code. By clicking on the <input type="text"/> button, you can search through the available territory codes and select the desired values from the list.
<i>Validity period</i>	The validity period of a territory.
<i>Period status</i>	The validity period status.
<i>Trade account rule set</i>	Valid values
	All All territories will be displayed.
	With rule set Only territories with rule set will be displayed
	Without rule set Only territories without rule set will be displayed
<i>Item rule set</i>	Valid values
	All All territories will be displayed.
	With rule set Only territories with rule set will be displayed
	Without rule set Only territories without rule set will be displayed
<i>Hierarchy level</i>	The territory hierarchy level code. By clicking on the <input type="text"/> button, you can search through the available territory hierarchy level codes and select the desired values from the list.
<i>Active representative position</i>	Valid values
	All All territories will be displayed.
	Yes Only territories with active representative positions will be displayed
	No Only territories with inactive representative positions will be displayed
<i>Active supervisor position</i>	Valid values
	All All territories will be displayed.
	With rule set Only territories with active supervisor positions will be displayed
	Without rule set Only territories with inactive supervisor positions will be displayed
<i>Columns</i>	
<i>Valid from</i>	The beginning of the hierarchy node validity period.
<i>Valid to</i>	The end of the hierarchy node validity period.
<i>Status</i>	The status of the hierarchy node.
<i>Trade account rule set</i>	The trade account rule set.
<i>Item rule set</i>	The item rule set.
<i>Active representative position</i>	Indication showing if the representative position is active or not.
<i>Active supervisor position</i>	Indication showing if the supervisor position is active or not.



## 7.11 Information about territory period trade account rule

This report is used for getting informed about a territory validity period in relation to the trade account rule set. To access this report go to [Menu: Sales > Territory management > Reports > Information about territory period trade account rule](#).

Field name	Description
<i>Parameter</i>	
<i>Territory</i>	The territory code. By clicking on the <input type="text"/> button, you can search through the available territory codes and select the desired values from the list.
<i>Period</i>	The time period in order to search for the corresponding validity periods.
<i>1<sup>st</sup> level</i>	
<i>Columns</i>	
<i>Hierarchy</i>	The territory hierarchy.
<i>Valid from</i>	The beginning of the hierarchy node validity period.
<i>Valid to</i>	The end of the hierarchy node validity period.
<i>Rule set</i>	The trade account rule set.
<i>Number of entries</i>	The number of entries included in the rule set
<i>2<sup>nd</sup> level</i>	
<i>Columns</i>	
<i>Person code</i>	The person's code.
<i>Person</i>	The person's name.
<i>Customer code</i>	The customer's code.
<i>Customer</i>	The customer's name.
<i>Address code</i>	The address code.
<i>Address 1</i>	The description of the address.
<i>ZIP code</i>	The address ZIP code.
<i>City</i>	The city.
<i>District</i>	The district.
<i>Geographical zone</i>	The geographical zone.
<i>Country</i>	The country.



Person code	Person	Customer code	Customer	Address code	Address 1	ZIP Code	City	District	Geographical zone	Country
0000006	ADAMS SHOES			1	KNAZA MILOSA	35250	Panalein	Panoravski	Centralna	SERBIA
0000156	Affleck Ben		1		40001	KPANEA	NAPIA		Macedonia West	GREECE
0000248	Agatha Kiriak		1		57001	BEZJACONIKH	BEZJACONIKH		Macedonia East Thr	GREECE
0000238	ALFA WOOD S.A		1		EPANIKOB MOCT	11070	BEOGRAD-NO	OPAD BEOGR	Centralna	SERBIA
0000238	ALFA WOOD S.A		2		STRADA PADIN	400518	Cluj-Napoca	Cluj	Ardeal	Romania

## 8. Territory connected applications

Territory management is connected to the following mobile applications:

- SFA & Merchandise app
- X-Van
- Med Rep (CRM Pharmaceutical industry)