Territory management

Entersoft Business Suite® | Entersoft CRM®

User guide

Identification

Software version Territory management

Last updated on 18/01/2021

Copyright

Symbols

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<ENTER>	Keyboard
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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:

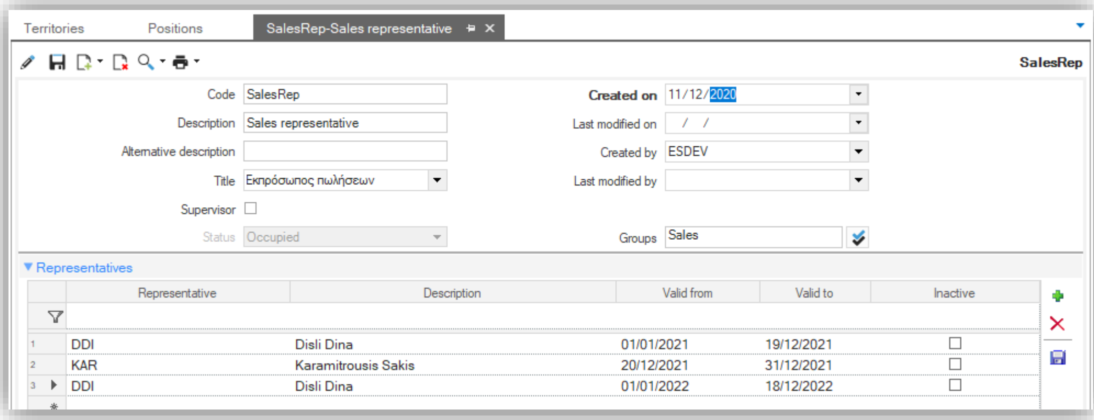
- Job title
- Owner position
- Representative position

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.



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:

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

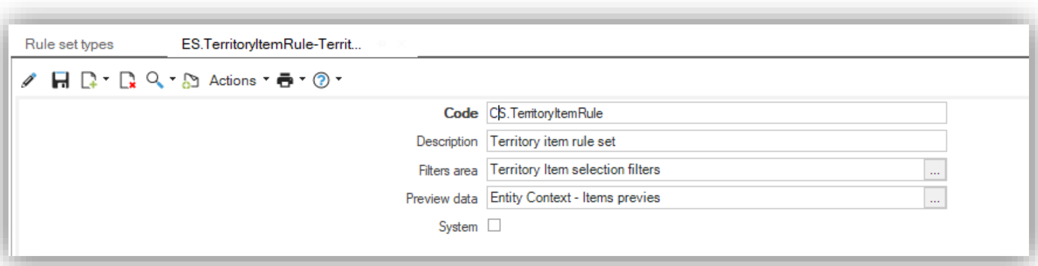
- 1st query Zip Code = '17671' except
- 2nd query Customer Code in '00001,'00002'

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:

<table>
<tr><th>Field name</th><th colspan="2">Description</th></tr>
<tr><td colspan="3">Basic Data</td></tr>
<tr><td>Code</td><td colspan="2">Mandatory - The code of the rule set type</td></tr>
<tr><td>Description</td><td colspan="2">Optional - The description of the rule set</td></tr>
<tr><td>Filters area</td><td colspan="2">Mandatory – By default, there are two filter areas, the Territory Item selection filters for the filters referring to item filters and Territory Trade account selection filters referring to trade account filters.</td></tr>
<tr><td rowspan="6">Preview data</td><td colspan="2">Mandatory – 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.</td></tr>
<tr><td colspan="2">System views by area</td></tr>
<tr><td>Area</td><td>View</td></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>
<tr><td>System</td><td colspan="2">It defines if the rule set type is system or not.</td></tr>
</table>



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:

Field name	***Description***
	Basic Data
Code	**Mandatory** - The code of the rule set
Description	Optional - The description of the rule set
Type	**Mandatory** – Two valid values; Territory business account rule set (ES.TerritoryBARule) & territory item rule set (ES.TerritoryItemRule)
Status	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’.
Created on	Creation date of the rule set. It is automatically filled out.
Last modified on	Modification date of the rule set. It is automatically filled out.
Created by	User who created this rule set
Last modified by	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

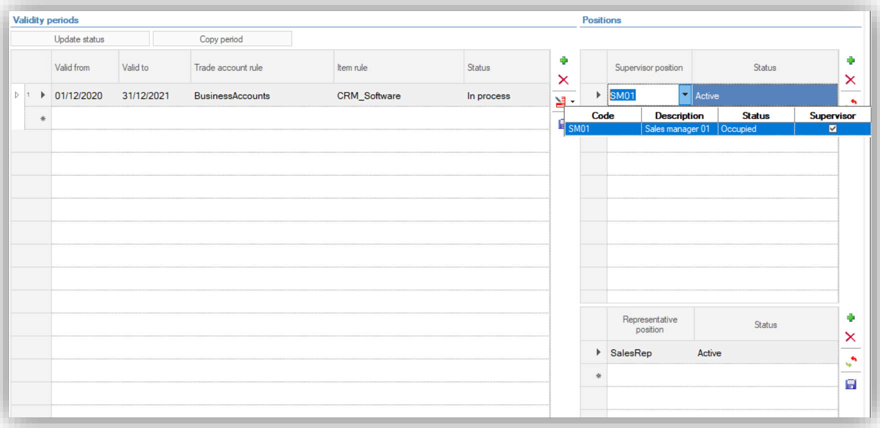
As previously mentioned the territory hierarchy defines a territory structure. There are four predefined territory hierarchies, though in case that these hierarchy territories are not compatible with your company's territory structure, you can create a new territory hierarchy by going through the Sales > 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:

Field name	***Description***
	Basic Data
Code	**Mandatory** - The code of the territory hierarchy
Description	Optional - The description of the territory hierarchy
Alternative description	Optional - The alternative description of the territory hierarchy
Groups	Optional – Working groups that could be assigned to this territory hierarchy. This groups should be also assigned to the related positions.
Created on	Creation date of the territory hierarchy. It is automatically filled out.
Last modified on	Modification date of the territory hierarchy. It is automatically filled out.
Created by	User who created this territory hierarchy
Last modified by	User who last modified this territory hierarchy
	Levels
Level	**Mandatory** - 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.
Code	**Mandatory** - The level code
Description	Optional – The level description
Alternative description	Optional – The level alternative description
Counter prefix	**Mandatory** - The prefix that will be assigned to the code of the territory node of this level. For detailed information, see *Working with territories* section
Number of digits in code	**Mandatory** - 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 *Working with territories* section

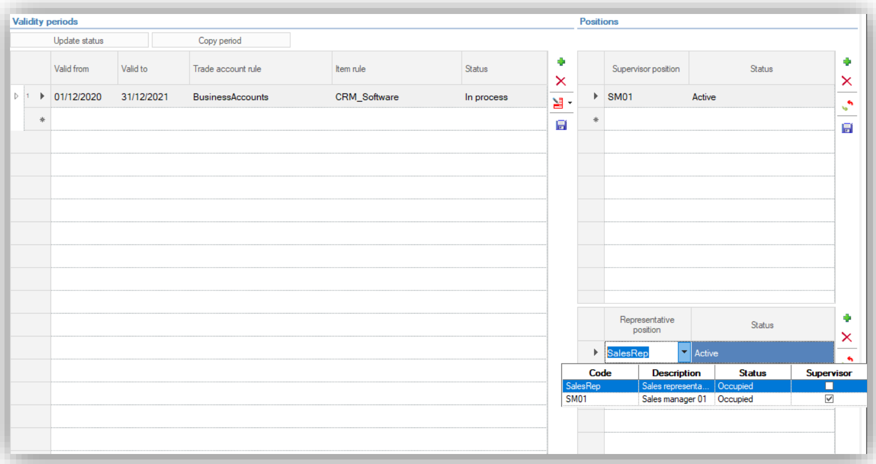
5. Working with territories

To create a new territory go through the Sales > Territory management > Territories to the 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 is best fits to your needs.

Field name	***Description***
Basic Data	
Code	**Mandatory** - It is automatically filled out, based on the selected territory hierarchy level
Description	**Mandatory** - The description of the territory
Level	**Mandatory** – It is automatically filled out, based on the selected territory hierarchy level
Created on	Creation date of the position. It is automatically filled out.
Last modified on	Modification date of the position. It is automatically filled out.
Created by	User who created this position
Last modified by	User who last modified this position
Validity periods	
Valid from	**Mandatory –** 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)
Valid to	**Mandatory –** 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)
Trade account rule	The trade account rule applied to this level for the specified validity period
Item rule	The item rule applied to this level for the specified validity period
Status	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 though specific action, see *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.



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.



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).

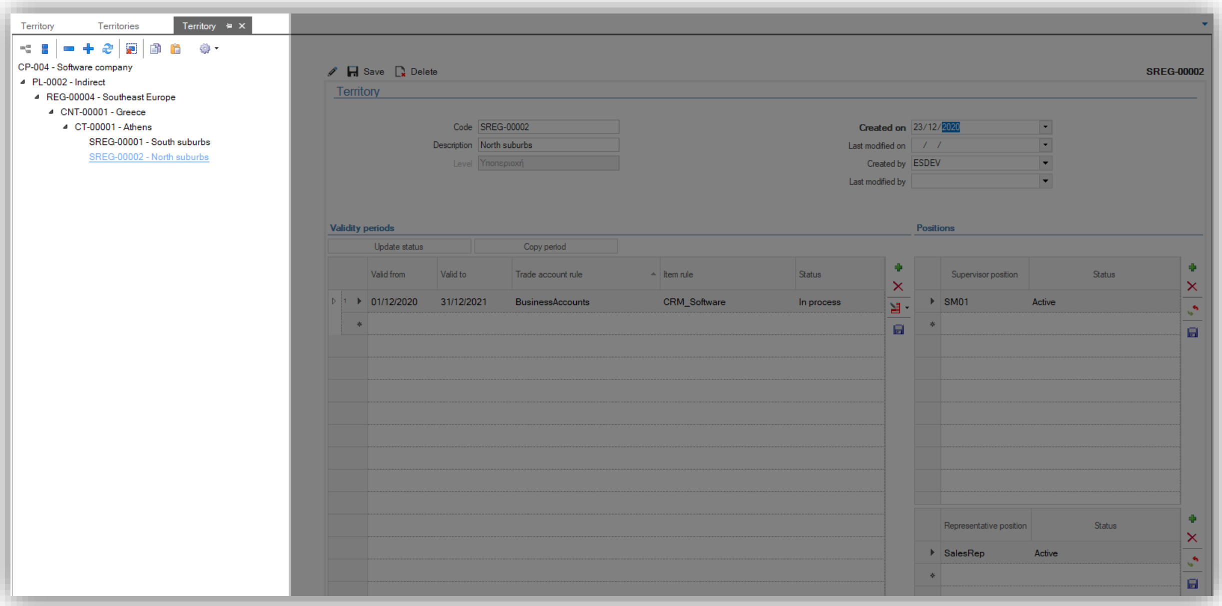
Update validity period status_section.

Supervisor Position	
Supervisor position	The supervisor position – Drop down list that shows all the available valid supervising positions for this territory node
Status	The status of the supervising position
Representative position	
Representative	**Mandatory** – The position of representative – Drop down list that shows all the available valid positions for this territory node
Status	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 1st 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.



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

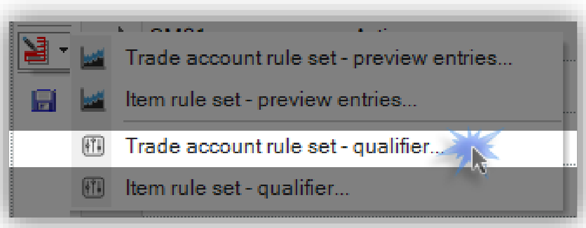
To copy and paste a selected node, you need to select the node you wish to copy and then click on the button and then paste the copied node by clicking on the button.

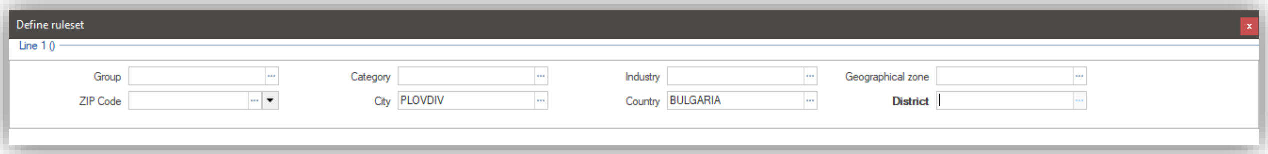
5.2 Manage validity periods

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

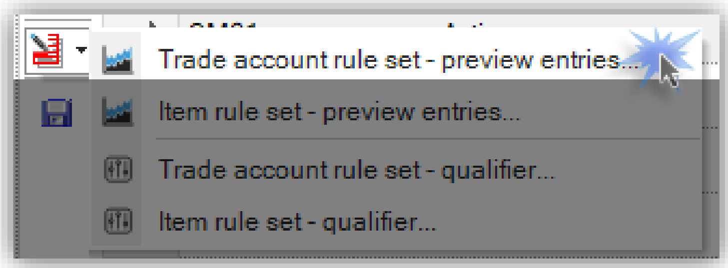
As previously mentioned, you can differentiate the rule set of the selected trade account rule set for a specific validity period by selecting the validity period line and then clicking on the button. A list of actions is shown and you need to select the *Trade account rule set – qualifier...* action.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

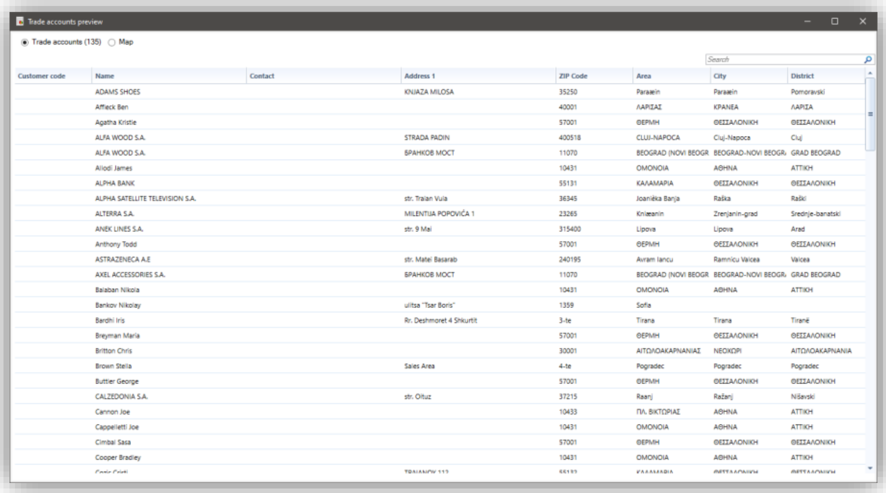




5.2.2 Preview trade account rule set

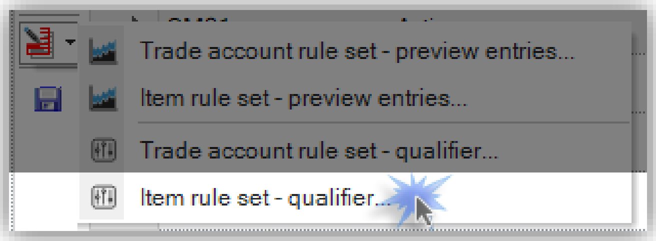
You can always preview the entries of a selected trade account rule set for a specific validity period by selecting the validity period line and then clicking on the button. A list of actions is shown and you need to select the *Trade account rule set – preview entries…* action.





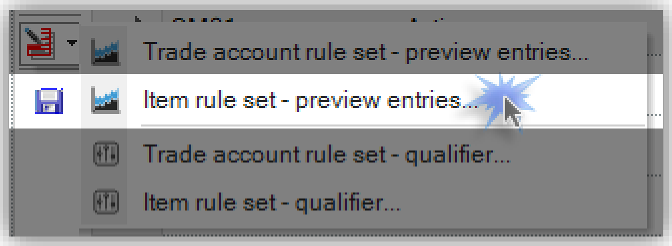
5.2.3 Set item rule set qualifiers

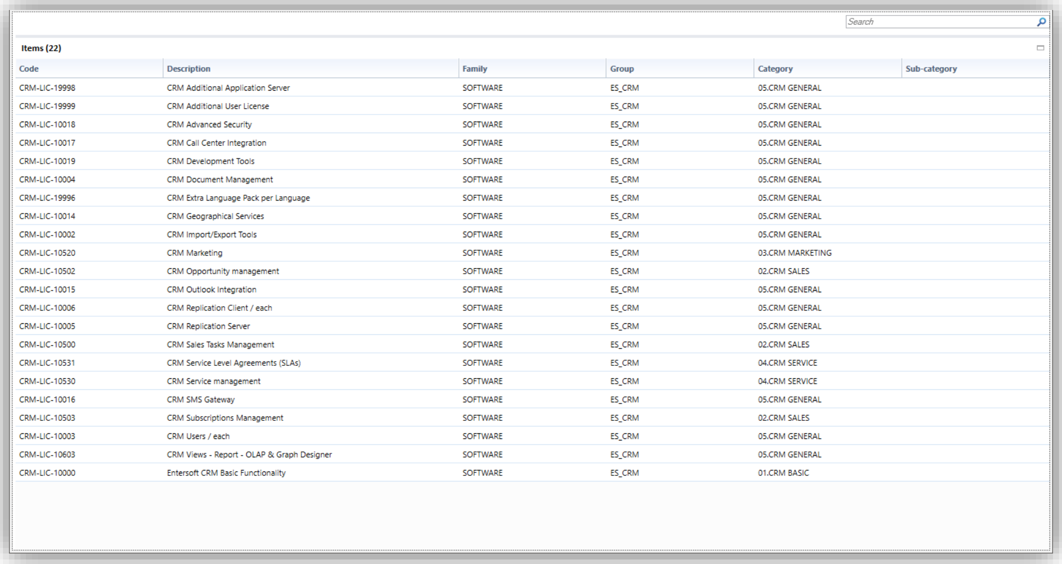
As previously mentioned, you can differentiate the rule set of the selected item rule set for a specific validity period by selecting the validity period line and then clicking on the button. A list of actions is shown and you need to select the *Item rule set – qualifier...* action. Through this action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





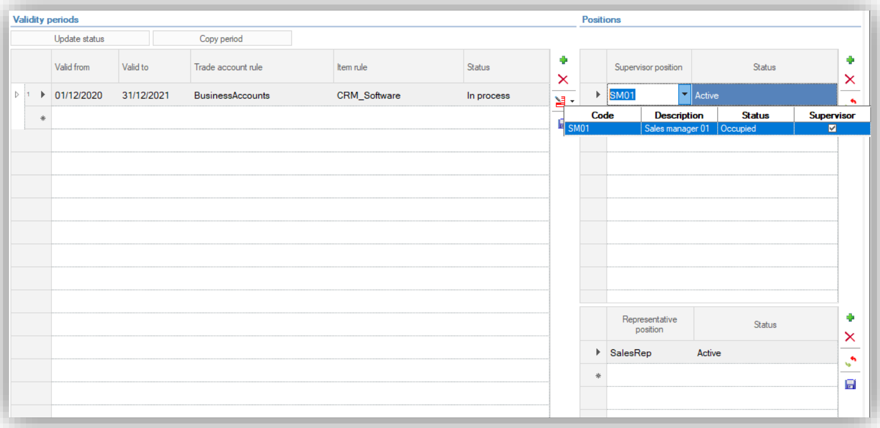
Search

Items (22)

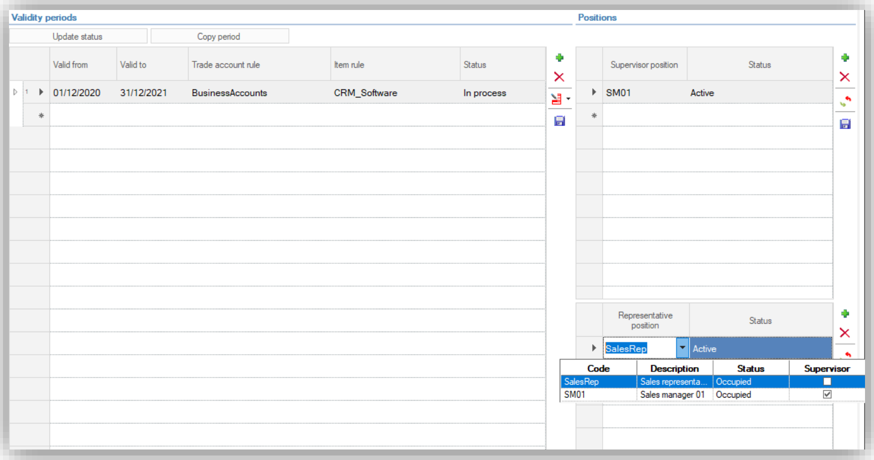
Code	Description	Family	Group	Category	Sub-category
CRM-LIC-19998	CRM Additional Application Server	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-19999	CRM Additional User License	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10018	CRM Advanced Security	SOFTWARE	ES_CRM	05.CRM GENERAL	
CRM-LIC-10017	CRM Call Center 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.



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.



Suggestion

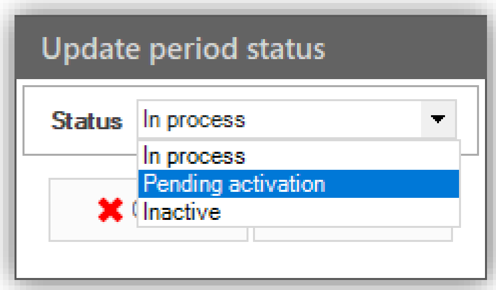
It is highly recommended to assign one supervising position and one representative position to each validity period. Otherwise, the same business accounts and/or items relationship will be created for the number of the assigned supervising positions and representative positions (e.g. if you have assigned 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 Update status button. By clicking on the 'Update status' button, a dialog box with a list of the available statuses is shown. The valid statuses are:

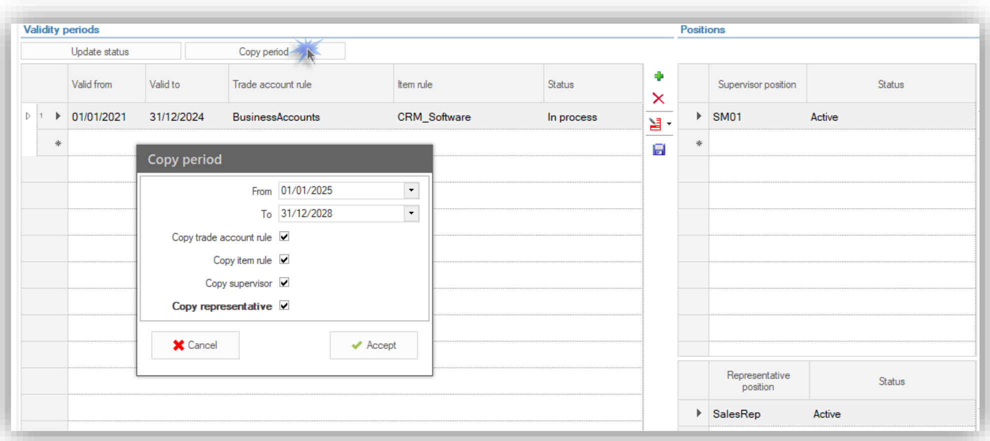
- In process – The default value set to the validity period
- Pending activation
- Active - It is only assigned by the system.
- Inactive

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

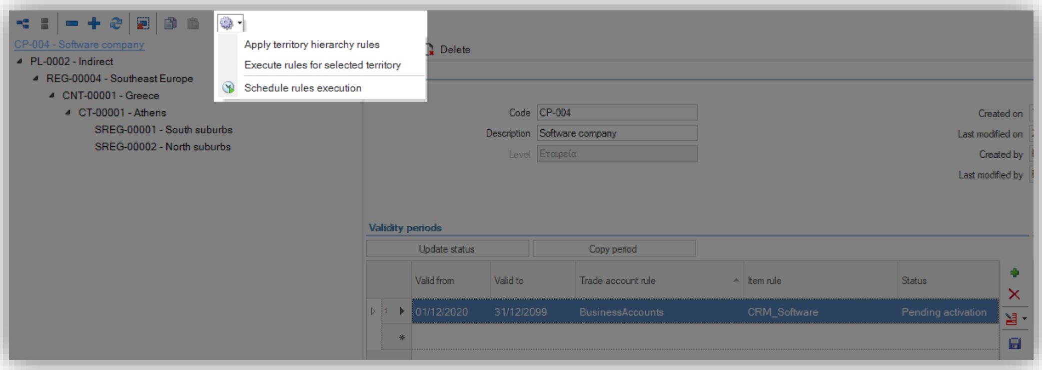
- **Execute rules for the selected territory**

  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 though the button placed at the top left part of the form.



Administrative lists &reports

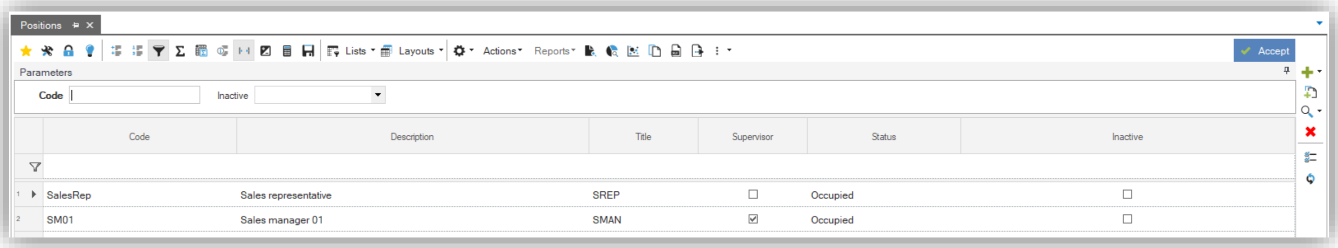
6. Administrative lists

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.

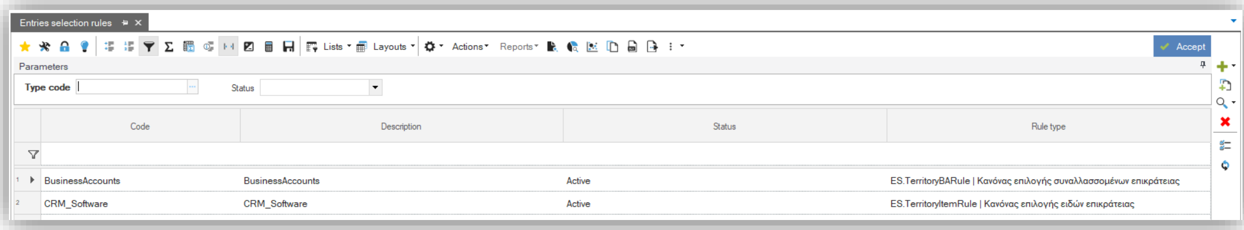
Field name	***Description***	
	Parameters	
Code	Optional - The position's code.	
Inactive	Optional	
	Valid values	
	Yes	The positions are inactive
	No	The positions are active
	Columns	
Code	The position code.	
Description	The position description.	
Title	The position title	
Supervisor	Indication that shows if the position is supervising or not.	
Status	The position's status.	
Inactive	Indication that shows if the position is active or not.	



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.

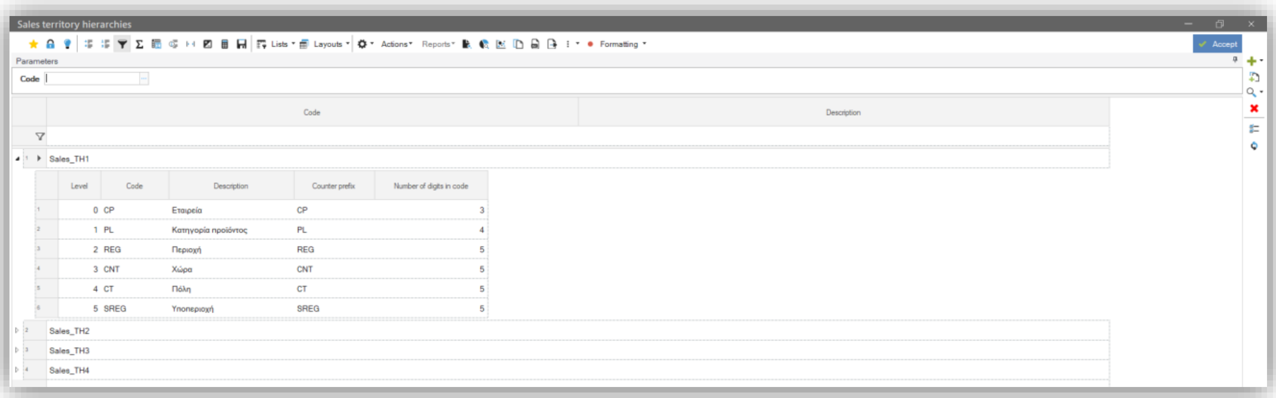
Field name	Description
	Parameters
Type code	Optional - The entry rule set type. By clicking on the ... button, you can search through the available entry rule set types and select the rule set type code from the list.
Status	Optional - Multiple choice list
	Valid values
	All
	In process
	Active
	Inactive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



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.

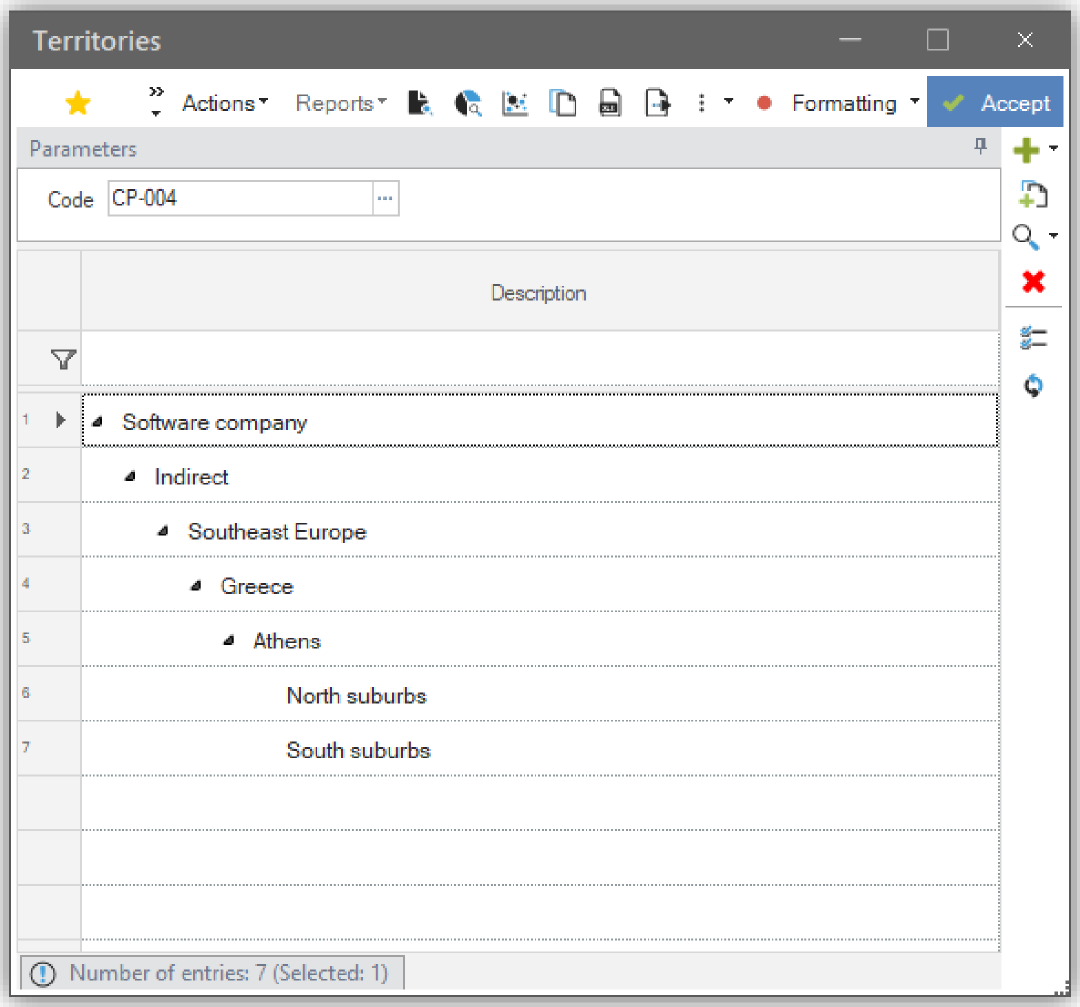
Field name	***Description***
	Parameter
Code	Optional - The sales hierarchy code. By clicking on the ... button, you can search through the available hierarchies and select the hierarchy code from the list.
	1st level
	Columns
Code	The sales hierarchy code.
Description	The sales hierarchy description
	2nd level
	Columns
Level	The level of the hierarchy node.
Code	The code of the hierarchy node.
Description	The description of the hierarchy node.
Counter prefix	The prefix that will be assigned to the code of the territory node of this level.
Number of digits in code	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.



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 ··· button, you can search through the available territories and select the territory code from the list.
	Column
Description	The sales territory description.

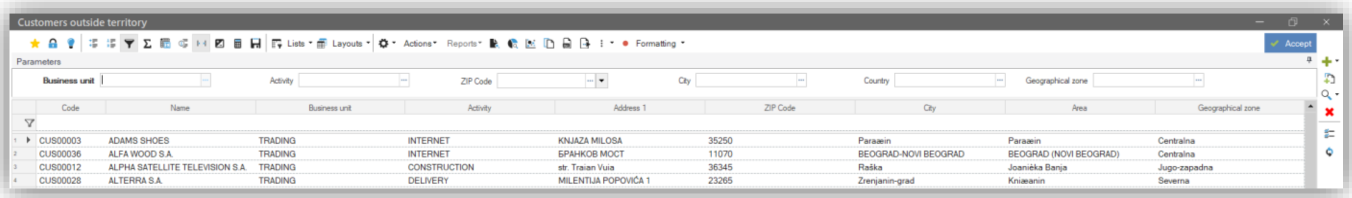


7. Administrative reports

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.

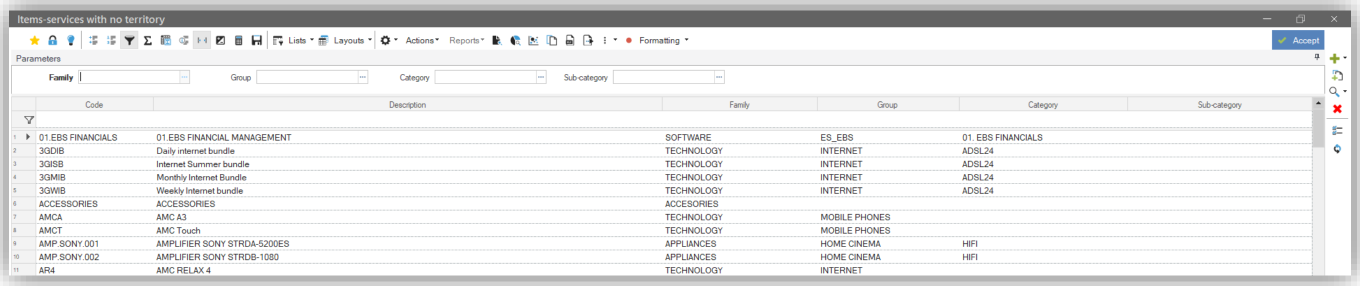
Field name	***Description***
	Parameters
Business unit	Optional - The business unit of the customers. By clicking on the ··· button, you can search through the available business units and select business unit code(s) from the list.
Activity	Optional - The activity of the customers. By clicking on the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



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.

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



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.

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

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

7.5 Customers assigned to multiple territories

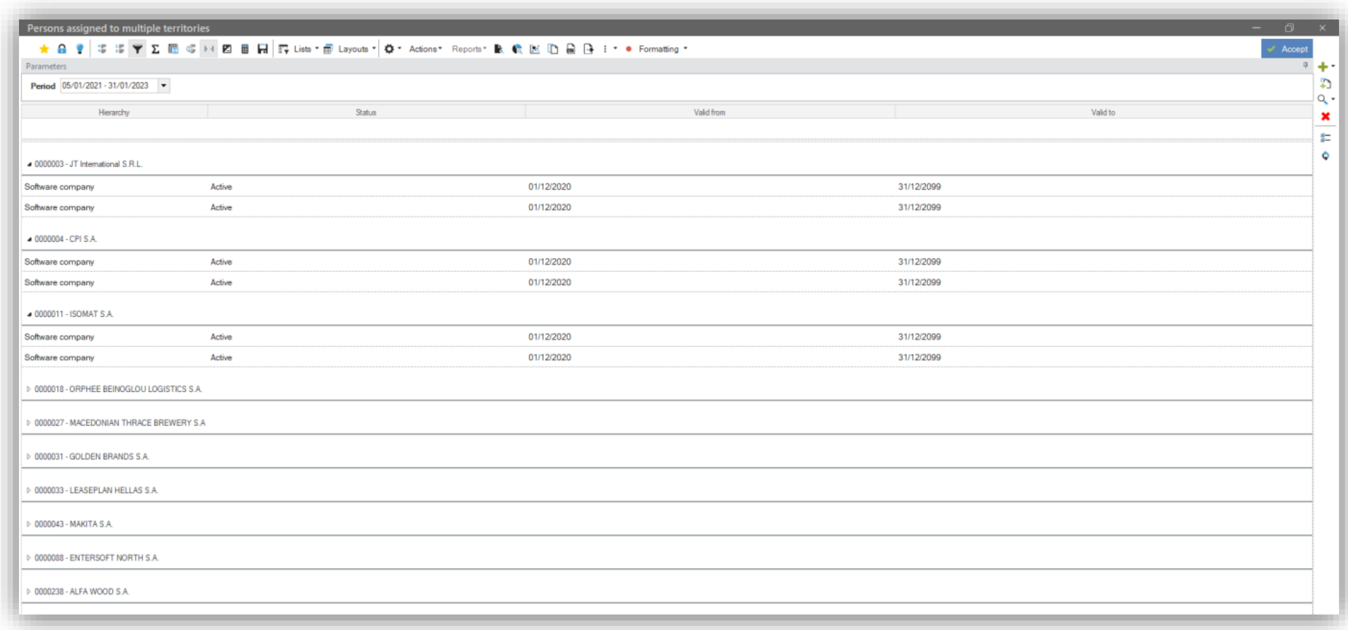
This report is used for getting informed about the customers who are assigned to multiple territories through a trade account rule set. To access this report go to Menu: Sales > Territory management > Reports > Customers assigned to multiple territories.

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

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



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.

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

7.8 Territory - Customers history log

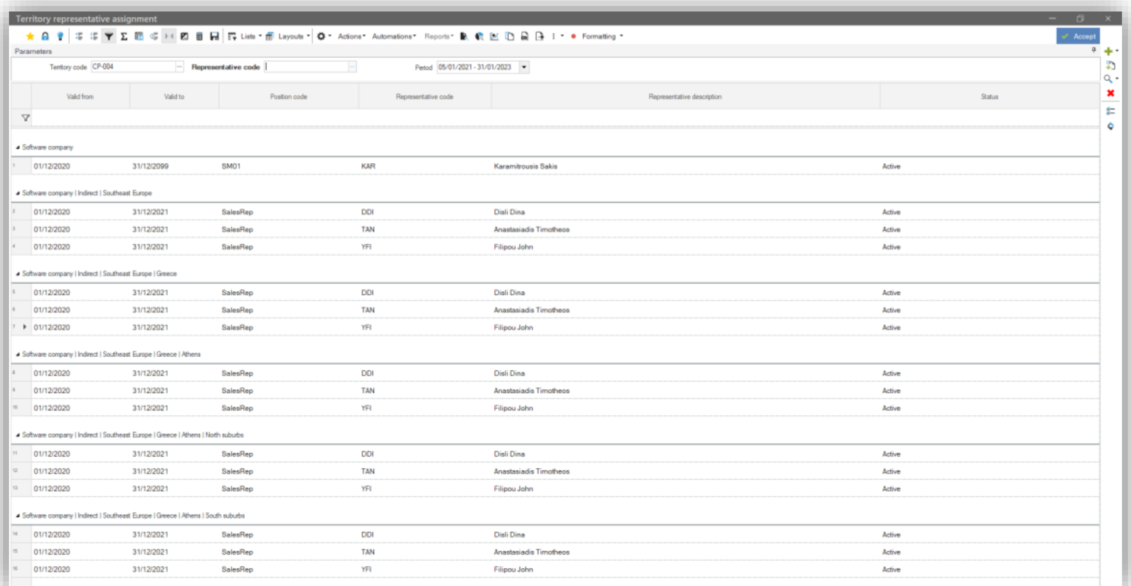
This report is used for getting informed about the changes applied to the business account rule set of a territory rule period. To access this report go to Menu: Sales > Territory management > Reports > Territory - Customers history log.

Field name	***Description***
	Parameter
Territory	The territory code. By clicking on the ··· button, you can search through the available territory codes and select the desired values from the list.
Period	The time period in order to search for the corresponding validity periods.
Status	The territory status.
	Columns
Territory	The territory.
Person code	The person's code.
Person	The person's name.
Customer code	The customer's code.
Customer	The customer's name.
Address code	The address code.
Address	The description of the address.
ZIP code	The address ZIP code.
City	The city.
Area	The area.
Geographical zone	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**
	Parameter
Territory code	The territory code. By clicking on the ··· button, you can search through the available territory codes and select the desired values from the list.
Representative code	The representative code. By clicking on the ··· button, you can search through the available representative codes and select the desired values from the list.
Period	The time period in order to search for the corresponding validity periods.
	Columns
Valid from	The beginning of the hierarchy node validity period.
Valid to	The end of the hierarchy node validity period.
Position code	The position code.
Representative code	The representative's code.
Representative description	The representative's description
Status	The status of the hierarchy node.



7.10 Territory information

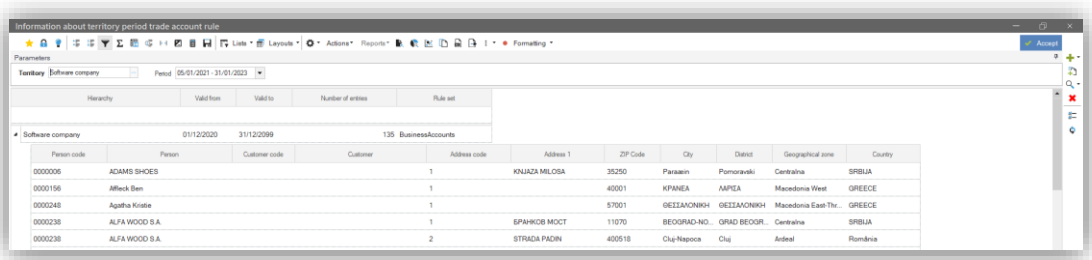
This report is used for getting informed about a territory. To access this report go to Menu: Sales > Territory management > Reports > Territory information.

Field name	Description	
Parameter		
Territory	The territory code. By clicking on the ··· button, you can search through the available territory codes and select the desired values from the list.	
Validity period	The validity period of a territory.	
Period status	The validity period status.	
Trade account rule set	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
Item rule set	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
Hierarchy level	The territory hierarchy level code. By clicking on the ··· button, you can search through the available territory hierarchy level codes and select the desired values from the list.	
Active representative position	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
Active supervisor position	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
Columns		
Valid from	The beginning of the hierarchy node validity period.	
Valid to	The end of the hierarchy node validity period.	
Status	The status of the hierarchy node.	
Trade account rule set	The trade account rule set.	
Item rule set	The item rule set.	
Active representative position	Indication showing if the representative position is active or not.	
Active supervisor position	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*
	Parameter
Territory	The territory code. By clicking on the ... button, you can search through the available territory codes and select the desired values from the list.
Period	The time period in order to search for the corresponding validity periods.
	1st level
	Columns
Hierarchy	The territory hierarchy.
Valid from	The beginning of the hierarchy node validity period.
Valid to	The end of the hierarchy node validity period.
Rule set	The trade account rule set.
Number of entries	The number of entries included in the rule set
	2nd level
	Columns
Person code	The person's code.
Person	The person's name.
Customer code	The customer's code.
Customer	The customer's name.
Address code	The address code.
Address 1	The description of the address.
ZIP code	The address ZIP code.
City	The city.
District	The district.
Geographical zone	The geographical zone.
Country	The country.



8. Territory connected applications

Territory management is connected to the following mobile applications:

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