

How to add a new Sales Area Manually

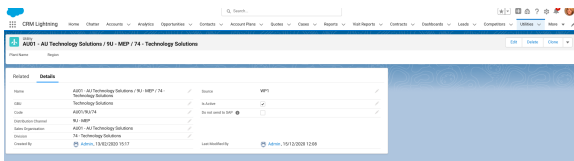
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Overview

In this section, you'll see how to create a new Sales Area, you can use also **CLONE** option to be quicker , just updating values to be modified in cloned record

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1. Go To Utilities object
2. Select list view = Sales Area
3. Search for a similar Sales Area to be cloned ex: AU01
4. open the record you want to clone
5. Click on button **Clone**
6. **update the cloned record and SAVE**
7. **go back to list**
8. **check your record is correctly created**



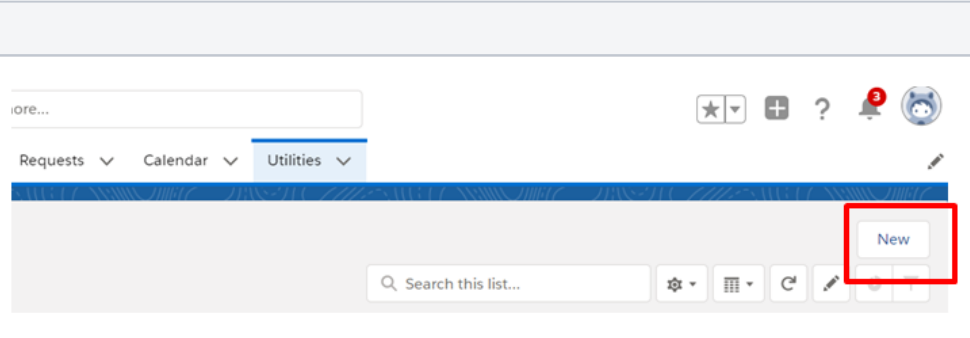
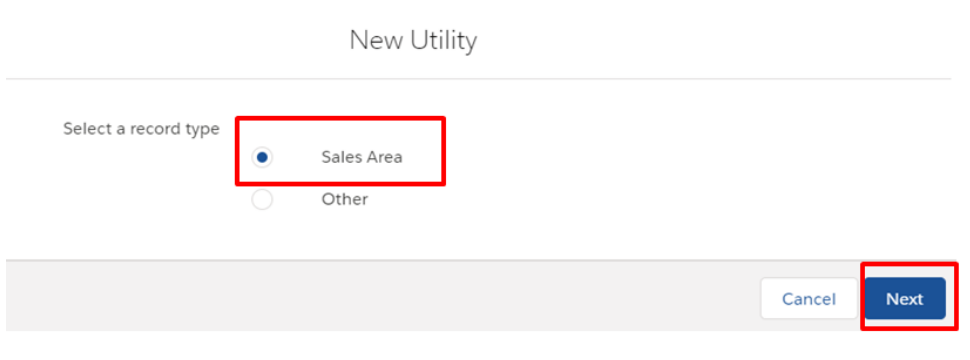
==> Always verify your record after update running the view again to check if there is no missing information or mistake) .

If exists already a similar Sales Area , can be cloned and updated

Concerned profiles:

SBS DATA TEAM

Step-By-Step

<p>When you are in the tab "Utilities", click on the button New on the right part of the screen .</p>	 A screenshot of the CRM interface. The top navigation bar shows "Requests", "Calendar", and "Utilities" tabs. The "Utilities" tab is active. On the right side of the screen, there is a "New" button highlighted with a red box. Below the navigation bar, there is a search bar and several icons.
<p>Select the option "Sales Area" and click on the button "Next".</p>	 A screenshot of the "New Utility" form. The form has a title "New Utility". Below the title, there is a section "Select a record type" with two radio buttons: "Sales Area" (selected) and "Other". The "Sales Area" radio button is highlighted with a red box. At the bottom right of the form, there are two buttons: "Cancel" and "Next". The "Next" button is highlighted with a red box.

Fill in all the fields:

- Name: Mandatory field. It's the concatenation of all the descriptions of Sales Organisation + Distribution Channel + Division
- Source: Must be WP1 or PF1. There is no check but this field MUST be populated.
- GBU: Select a GBU if the Sales Area is dedicated to a GBU. Leave it with None, if the Sales Area is available for all the GBUs
- Code: it's the concatenation of all the codes of Sales Organisation + Distribution Channel + Division
- Distribution Channel: distribution channel description
- Sales Organisation: sales organisation description
- Division: division description

Click on Save if you have only 1 Sales Area to create.

Click on "Save & New", if you have more than 1 Sales Area to create.

New Utility: Sales Area

Information

*Name	Source
<input type="text"/>	<input type="text"/>
GBU	Is Active
--None--	<input checked="" type="checkbox"/>
Code	
<input type="text"/>	
Distribution Channel	
<input type="text"/>	
Sales Organisation	
<input type="text"/>	
Division	
<input type="text"/>	

Related articles

Need help?

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