

## **SPM - Update Region and Territory Utility**

The utility will allow the user to update SPM Region and Territory in Opera. The process will include full data validation and exception report reporting. Particularly helpful for changing Account Managers against customer/prospect records

### ➤ **Update Region and Territory Utility**

A new menu option will be added to the "SPM – Utilities" menu captioned 'Update Region and Territory'. Selection of this option will invoke a process that allows the user to browse for and select the CSV (Comma Separated Values) file to import.

Once the valid files have been selected the import process will validate the data. Any data that fails the validation process will raise an exception, with the entire update then being aborted. An exception report will then be generated detailing all exceptions.

#### **Import Validation Check**

- "Company ID" must always be present and this would be validated against Opera 3 Sales Pipeline Management Database.
- "Region" must always be present.
- "Territory" must always be present.

Upon successful validation of the data, the bespoke process will update the Region and Territory contained in the import file.

A standard Opera 3 Report would be created that list all updated SPM Region and Territory.

**SPM Update Region/Territory Utility - £550.00**

**Annual Maintenance and Support - £120.00**