



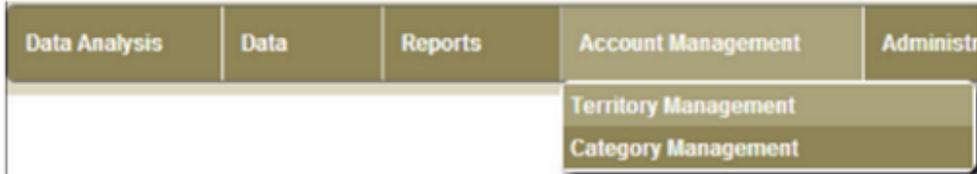
Custom Territory & Category Management Tutorial

1.



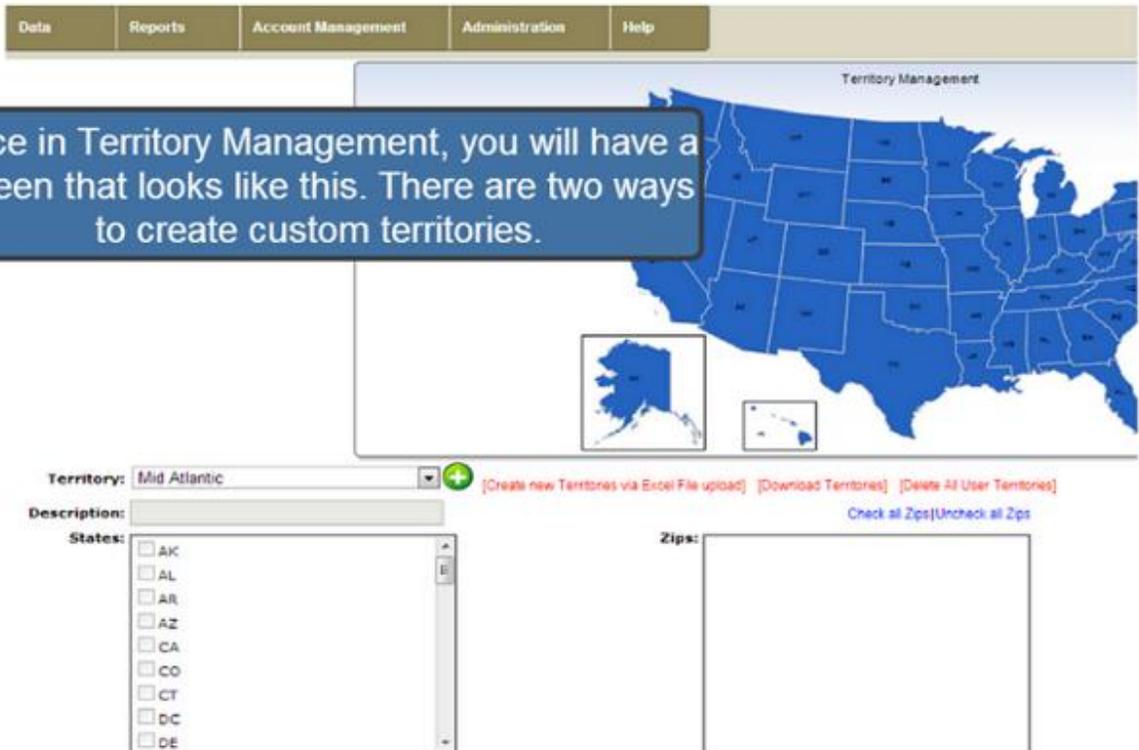
The first step to setting up custom sales territories is navigating to "Account Management" and selecting "Territory Management."

2.



From here, you will be able to create and maintain custom sales territories. This will allow you to run reports using your custom territories instead of the default SDM regions or by total US.

3.



4.

Data Reports Account Management Administration Help

Territory Management



The first is by doing it manually. This is only ideal for doing a few territories or for adjusting zip code allotment in already defined territories.

Territory: Mid Atlantic [Create new Territories via Excel File upload] [Download Territories] [Delete All User Territories]

Description:

States:

- AK
- AL
- AR
- AZ
- CA
- CO
- CT
- DC
- DE

Zips:

[Check all Zips](#) [Uncheck all Zips](#)

5.

Data Reports Account Management Administration Help

Territory Management



To begin, select the green (+) and enter a Territory Name in the pop-up window.

Territory: Mid Atlantic [Create new Territories via Excel File upload] [Download Territories] [Delete All User Territories]

Description:

States:

- AK
- AL
- AR
- AZ
- CA
- CO
- CT
- DC
- DE

Zips:

[Check all Zips](#) [Uncheck all Zips](#)

6.

Now that you have your first territory created, we can assign zip codes to it.



Territory Management

Territory: Custom 1 [Create new Territories via Excel File upload] [Download Territories] [Delete All User Te]

Description: Custom 1

States:

- AK
- AL
- AR
- AZ
- CA
- CO
- CT
- DC
- DE

Zips:

7.

Select the states associated with your territory from the menu.



Territory Management

Territory: Custom 1 [Create new Territories via Excel File upload] [Download Territories] [Delete All User Te]

Description: Custom 1

States:

- AK
- AL
- AR
- AZ
- CA
- CO
- CT
- DC
- DE

Zips:

8.

Now that we've selected AK, our "Zips" menu has been populated with all of the zips within AK.

The screenshot shows the 'Territory Management' interface. At the top, there is a map of the United States with Alaska highlighted in blue. Below the map, there are several controls: a 'Territory' dropdown menu set to 'Custom 1', a 'Description' field set to 'Custom 1', and a 'States' list with checkboxes for AK, AL, AR, AZ, CA, CO, CT, DC, and DE. The 'AK' checkbox is checked. To the right of the 'States' list, there is a 'Zips' list with checkboxes for 995, 996, 997, 998, and 999, all of which are checked. At the bottom, there are 'Save' and 'Clear Changes' buttons. A blue callout box with an arrow points to the 'Zips' list.

9.

With our zips selected, we can select "Save" and our new custom territory will be ready to use in all reports.

This screenshot is similar to the previous one, showing the 'Territory Management' interface. The 'States' list is now scrolled down, showing checkboxes for AZ, CA, CO, CT, DC, and DE. The 'Zips' list remains visible with checkboxes for 995, 996, 997, 998, and 999, all checked. The 'Save' button is now highlighted, indicating it is the next step in the process. A blue callout box with an arrow points to the 'Save' button.

10.

Territory: Mid Atlantic  [\[Create new Territories via Excel File upload\]](#) [\[Download Territories\]](#) [\[Delete All User Territories\]](#)

Description:

States: AK AL AR AZ CA CO CT DC DE

Zips:

[Check all Zips](#) [Uncheck all Zips](#)

When uploading a large number of territories, it is easiest to do it via Excel.

11.

Territory: Mid Atlantic  [\[Create new Territories via Excel File upload\]](#) [\[Download Territories\]](#) [\[Delete All User Territories\]](#)

Description:

States: AK AL AR AZ

Zips:

[Check all Zips](#) [Uncheck all Zips](#)

To begin, select "Create new Territories via Excel File upload."

13.

Territory:  [\[Create new Territories via Excel File upload\]](#) [\[Download Territories\]](#) [\[Delete All User Territories\]](#)

Description:

States: AK AL AR AZ CA CO CT DC DE

Zips:

[Check all Zips](#) [Uncheck all Zips](#)

A toolbar will appear below.

File must be in specified format. Use the Download Example button to see the necessary Excel format (column orders, expected data, etc).

No file chosen

14.

Territory:  [\[Create new Territories via Excel File upload\]](#) [\[Download Territories\]](#) [\[Delete All User Territories\]](#)

Description:

States: AK AL AR AZ CA CO CT DC DE

Zips:

[Check all Zips](#) [Uncheck all Zips](#)

Selecting this button will generate a sample Excel file explaining the required file format.

File must be in specified format. Use the Download Example button to see the necessary Excel format (column orders, expected data, etc).

No file chosen

15.

	A	B	C
1	Territory Name	State	Zip
2	Custom 1	AK	996
3	Custom 1	AK	995
4	Custom 1	AK	999
5	Custom 1	AK	998
6	Custom 2	NY	122
7	Custom 2	NY	131
8	Custom 2	NY	130
9	Custom 2	NY	127
10	Custom 2	NY	134
11	Custom 3	IA	505
12	Custom 3	IA	513
13	Custom 3	IA	506
14	Custom 4	IN	471

Your Excel file to be uploaded must be in a format like this.

16.

	A	B	C
1	Territory Name	State	Zip
2	Custom 1	AK	996
3	Custom 1	AK	995
4	Custom 1	AK	999
5	Custom 1	AK	998
6	Custom 2	NY	122
7	Custom 2	NY	131
8	Custom 2	NY	130
9	Custom 2	NY	127
10	Custom 2	NY	134
11	Custom 3	IA	505
12	Custom 3	IA	513
13	Custom 3	IA	506
14	Custom 4	IN	471

Each 3 digit zip needs to be matched with the appropriate state abbreviation, and also the name of the Territory it should be assigned to.

17.

Territory:  [\[Create new Territories via Excel File upload\]](#) [\[Download Territories\]](#) [\[Delete All User Territories\]](#)

Description:

States: AK AL AR AZ CA CO CT DC DE

Zips:

[Check all Zps](#) [Uncheck all Zps](#)

The next step is to choose your file.

File must be in specified format. Use the Download Example button to see the necessary Excel format (column orders, expected data, etc).

No file chosen

18.

Territory:  [\[Create new Territories via Excel File upload\]](#) [\[Download Territories\]](#) [\[Delete All User Territories\]](#)

Description:

States: AK AL AR AZ CA CO CT DC DE

Zips:

[Check all Zps](#) [Uncheck all Zps](#)

Then, hit "Upload Territory From Excel Document."

File must be in specified format. Use the Download Example button to see the necessary Excel format (column orders, expected data, etc).

No file chosen

19.

Territory:  [\[Create new Territories via Excel File upload\]](#) [\[Download Territories\]](#) [\[Delete All User Territories\]](#)

Description:

States: AK AL AR AZ CA CO CT DC DE

Zips:

[Check all Zips](#) [Uncheck all Zips](#)

Upon completion, your custom territories will now be ready to use in all reports.

File must be in specified format. Use the Download Example button to see the necessary Excel format (column orders, expected data, etc).

No file chosen

20.

Territory:  [\[Create new Territories via Excel File upload\]](#) [\[Download Territories\]](#) [\[Delete All User Territories\]](#)

Description:

States: AK AL AR AZ CA CO CT DC DE

Zips:

[Check all Zips](#) [Uncheck all Zips](#)

Upon completion, your custom territories will now be ready to use in all reports.

File must be in specified format. Use the Download Example button to see the necessary Excel format (column orders, expected data, etc).

No file chosen

21.

Data Analysis	Data	Reports	Account Management	Administ
			Territory Management	
			Category Management	

From here, you will be able to create and maintain custom category groups. For example, you could create a "Basic Operator" category that consists of Operatory Lights, Stools, Chairs, Units, etc. When you go to run a report, you could then select "Basic Operator" rather than selecting each individual category.

22.

Custom Category List: Basic Operator

Categories Included:

- 27030300 Miscellaneous Air/Water Converter
- 60020000 Large Equipment Air Compressors
- 60030000 Large Equipment Dental Chairs
- 60040000 Large Equipment Dental Units
- 60050100 Large Equipment Digital Radiography
- 60050300 Large Equipment Digital Radiography
- 60050400 Large Equipment Digital Radiography
- 60050500 Large Equipment Digital Radiography 3D Cone Beam Tomography
- 60060000 Large Equipment Digital Impression Systems
- 60070100 Large Equipment Cameras Intraoral
- 60080000 Large Equipment Lasers Units
- 60090000 Large Equipment Operatory Lights
- 60100000 Large Equipment Nitrous Oxide Systems
- 60110000 Large Equipment Stools
- 60120000 Large Equipment Vacuums
- 60130101 Large Equipment X-Ray Intraoral Units
- 60130201 Large Equipment X-Ray Extraoral Units
- 60150100 Large Equipment Diagnostic Systems
- 60170000 Large Equipment Cabinetry

First, hit the green (+) button.

23.

Custom Category List: Basic Operator

Categories Included:

- 27030300 Miscellaneous Air/Water Converter
- 60020000 Large Equipment Air Compressors
- 60030000 Large Equipment Dental Chairs
- 60040000 Large Equipment Dental Units
- 60050100 Large Equipment Digital Radiography Intraoral
- 60050300 Large Equipment Digital Radiography Extraoral
- 60050400 Large Equipment Digital Radiography Phosphor Plate
- 60050500 L
- 60060000 L
- 60070100 L
- 60080000 L
- 60090000 L
- 60100000 Large Equipment Nitrous Oxide Systems
- 60110000 Large Equipment Stools
- 60120000 Large Equipment Vacuums
- 60130101 Large Equipment X-Ray Intraoral Units
- 60130201 Large Equipment X-Ray Extraoral Units
- 60150100 Large Equipment Diagnostic Systems
- 60170000 Large Equipment Cabinetry

New Category List Name: Basic Operator

OK Cancel

Save Clear Changes

Enter a category name in the pop-up window. Then hit "OK."

24.

Custom Category List: Basic Operator

Categories Included:

- 27030300 Miscellaneous Air/Water Converter
- 60020000 Large Equipment Air Compressors
- 60030000 Large Equipment Dental Chairs
- 60040000 Large Equipment Dental Units
- 60050100 Large Equipment Digital Radiography Intraoral
- 60050300 Large Equipment Digital Radiography Extraoral
- 60050400 Large Equipment Digital Radiography Phosphor Plate
- 60050500 Large Equipment Digital Radiography 3D Cone Beam Tomography
- 60060000 Large Equipment Digital Intraoral
- 60070100 Large Equipment Cameras
- 60080000 Large Equipment Lasers
- 60090000 Large Equipment Operator
- 60100000 Large Equipment Nitrous Oxide Systems
- 60110000 Large Equipment Stools
- 60120000 Large Equipment Vacuums
- 60130101 Large Equipment X-Ray Intraoral Units
- 60130201 Large Equipment X-Ray Extraoral Units
- 60150100 Large Equipment Diagnostic Systems
- 60170000 Large Equipment Cabinetry

Save Clear Changes

Now select the appropriate categories to be included in your custom category.

25.

Custom Category List: Basic Operator  

Categories Included:

- 27030300 Miscellaneous Air/Water Converter
- 60020000 Large Equipment Air Compressors
- 60030000 Large Equipment Dental Chairs
- 60040000 Large Equipment Dental Units
- 60050100 Large Equipment Digital Radiography Intraoral
- 60050300 Large Equipment Digital Radiography Extraoral
- 60050400 Large Equipment Digital Radiography Phosphor Plate
- 60050500 Large Equipment Digital Radiography 3D Cone Beam Tomography
- 60060000 Large Equipment Digital Impression Systems
- 60070100 Large Equipment Cameras Intraoral
- 60080000 Large Equipment Lasers Units
- 60090000 Large Equipment Operator Lights
- 60100000 Large Equipment X-ray Units
- 60170000 Large Equipment Cabinetry

Finally, hit save and your custom category is ready to be used in report generation.

