Custom Territory & Category Management Tutorial

1.

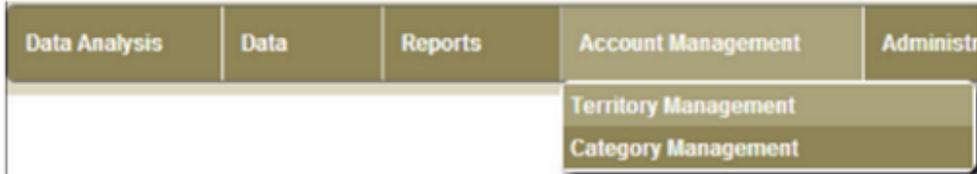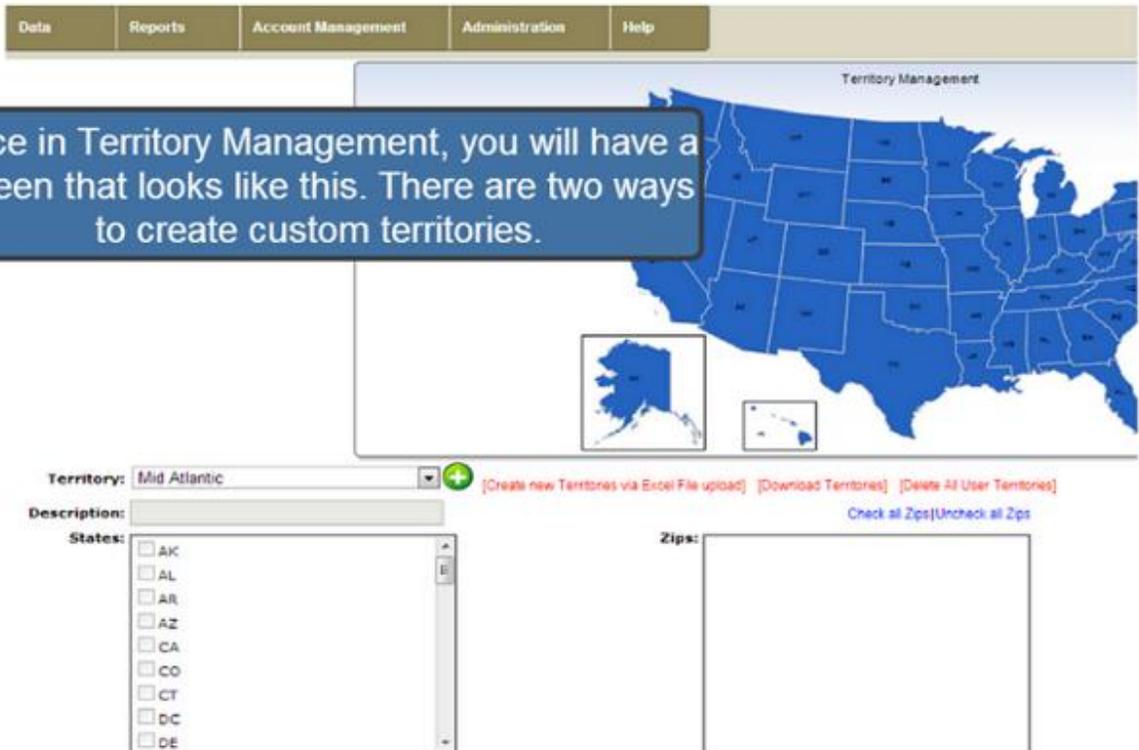| Data Analysis | Data | Reports | Account Management | Administr |

Territory Management
Category Management

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

2.

Data Analysis	Data	Reports	Account Management	Administr
			Territory Management	
			Category Management	

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.

Once in Territory Management, you will have a screen that looks like this. There are two ways to create custom territories.

4.

5.

6.

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

7.

Select the states associated with your territory from the menu.

8.

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

9.

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

10.

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

Description:

Check all Zips|Uncheck all Zips

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

Zips:

Save   Clear Changes

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:

Check all Zips|Uncheck all Zips

States:
- AK
- AL
- AR
- AZ

Zips:

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

Save   Clear Changes

13.

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

Description: [   ]   Check all Zips|Uncheck all Zips

States:
- ☐ AK
- ☐ AL
- ☐ AR
- ☐ AZ
- ☐ CA
- ☐ CO
- ☐ CT
- ☐ DC
- ☐ DE

Zips: [   ]

[Save]   [Clear Changes]

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.).

[Choose File] No file chosen   [Upload Territory From Excel Document]   [Download Excel Example File Format]

14.

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

Description: [   ]   Check all Zips|Uncheck all Zips

States:
- ☐ AK
- ☐ AL
- ☐ AR
- ☐ AZ
- ☐ CA
- ☐ CO
- ☐ CT
- ☐ DC
- ☐ DE

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.).

[Choose File] No file chosen   [Upload Territory From Excel Document]   [Download Excel Example File Format]

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

Description: Check all Zips|Uncheck all Zips

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

Zips:

Save   Clear Changes

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).

Choose File | No file chosen   Upload Territory From Excel Document   Download Excel Example File Format

18.

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

Description: Check all Zips|Uncheck all Zips

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

Zips:

Save   Clear Changes

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).

Choose File | No file chosen   Upload Territory From Excel Document   Download Excel Example File Format

19.

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

Description: _____   Check all Zips|Uncheck all Zips

States:
☐ AK
☐ AL
☐ AR
☐ AZ
☐ CA
☐ CO
☐ CT
☐ DC
☐ DE

Zips:

[Save] [Clear Changes]

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).

[Choose File] No file chosen   [Upload Territory From Excel Document]   [Download Excel Example File Format]

20.

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

Description: _____   Check all Zips|Uncheck all Zips

States:
☐ AK
☐ AL
☐ AR
☐ AZ
☐ CA
☐ CO
☐ CT
☐ DC
☐ DE

Zips:

[Save] [Clear Changes]

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).

[Choose File] No file chosen   [Upload Territory From Excel Document]   [Download Excel Example File Format]

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 Operatory" category that consists of Operatory Lights, Stools, Chairs, Units, etc. When you go to run a report, you could then select "Basic Operatory" rather than selecting each individual category.

22.

Custom Category List: Basic Operatory

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.

Save | Clear Changes

23.

Custom Category List: Basic Operatory

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 Operatory

[OK]   [Cancel]

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

[Save]   [Clear Changes]

24.

Custom Category List: Basic Operatory

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 I
- ☐ 60070100 Large Equipment Camera
- ☐ 60080000 Large Equipment Lasers U
- ☑ 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

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

[Save]   [Clear Changes]

25.

Custom Category List: Basic Operatory ▾ ⊕ ✕

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 Operatory Lights

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

- ☑ 60170000 Large Equipment Cabinetry

[Save]   [Clear Changes]