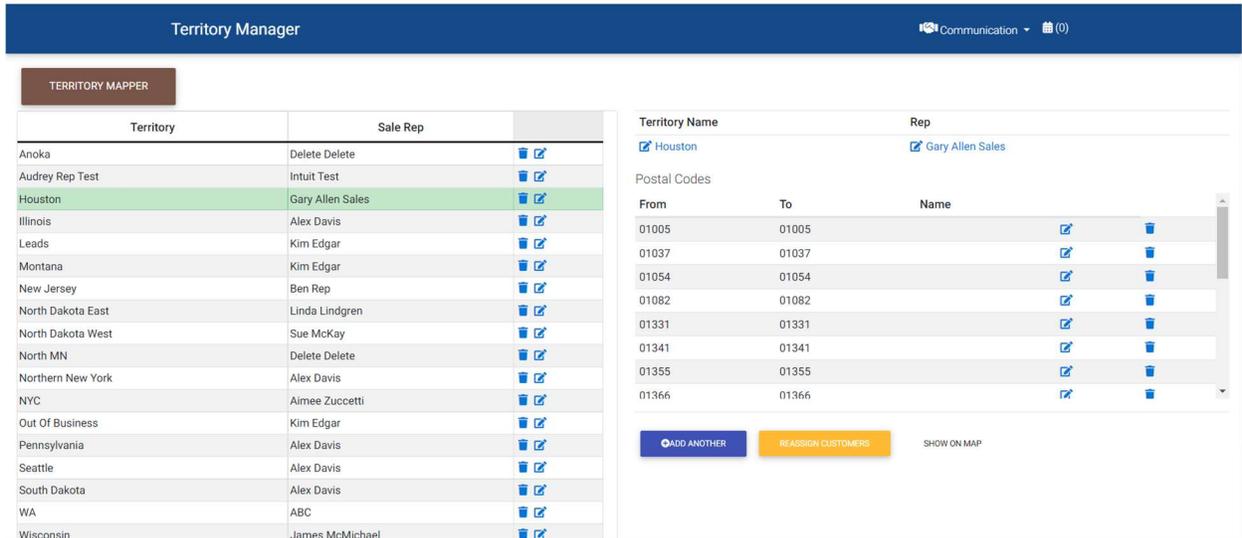


## Territory Manager

In this FAQ it will go over the Territory Manager and how it applies to territories and reps.

Under “MyOrganization” you will find Organization Manager, this is also known as the “Territory Manager”. In this tab, you can create and assign territories to reps.



The screenshot shows the "Territory Manager" interface. On the left, there is a "TERRITORY MAPPER" section with a table listing territories and their assigned sales representatives. The "Houston" territory is highlighted in green.

Territory	Sale Rep	
Anoka	Delete Delete	
Audrey Rep Test	Intuit Test	
Houston	Gary Allen Sales	
Illinois	Alex Davis	
Leads	Kim Edgar	
Montana	Kim Edgar	
New Jersey	Ben Rep	
North Dakota East	Linda Lindgren	
North Dakota West	Sue McKay	
North MN	Delete Delete	
Northern New York	Alex Davis	
NYC	Aimee Zuccetti	
Out Of Business	Kim Edgar	
Pennsylvania	Alex Davis	
Seattle	Alex Davis	
South Dakota	Alex Davis	
WA	ABC	
Wisconsin	James McMichael	

On the right, the "Houston" territory details are shown. It includes the territory name "Houston" and the assigned rep "Gary Allen Sales". Below this is a table of "Postal Codes" with columns for "From", "To", and "Name".

From	To	Name		
01005	01005			
01037	01037			
01054	01054			
01082	01082			
01331	01331			
01341	01341			
01355	01355			
01366	01366			

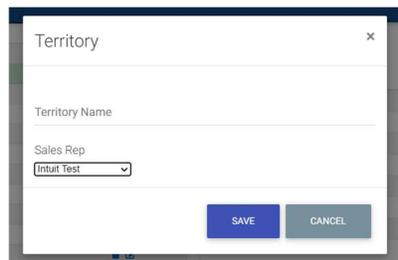
At the bottom of the details panel, there are three buttons: "ADD ANOTHER", "REASSIGN CUSTOMERS", and "SHOW ON MAP".

## Creating a new Territory

1. To create a new territory, click on the plus symbol at the bottom left of the territory list.



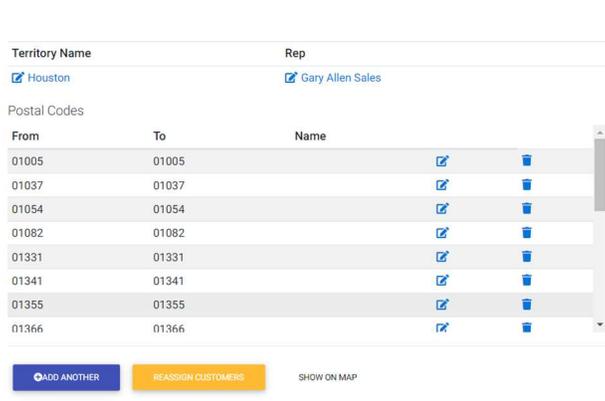
2. In the new window, name the territory and the rep who will oversee it.



The screenshot shows a dialog box titled "Territory" with a close button (x) in the top right corner. It contains two input fields: "Territory Name" and "Sales Rep". The "Sales Rep" field has a dropdown menu with "Intuit Test" selected. At the bottom of the dialog, there are two buttons: "SAVE" and "CANCEL".

3. Click Save.

4. Back in the Territory Manager, click on the territory. On the right side of the screen, you will now assign the zip codes that make up that territory. Click the blue “Add Another” button.

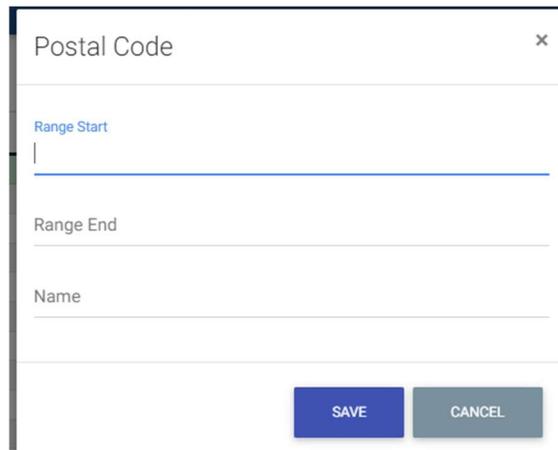


Territory Name: Houston  
Rep: Gary Allen Sales

Postal Codes

From	To	Name		
01005	01005			
01037	01037			
01054	01054			
01082	01082			
01331	01331			
01341	01341			
01355	01355			
01366	01366			

5. In the new window, enter the starting and ending range of zip codes that make up the territory and the name (optional). Click Save when you are done.



Postal Code [X]

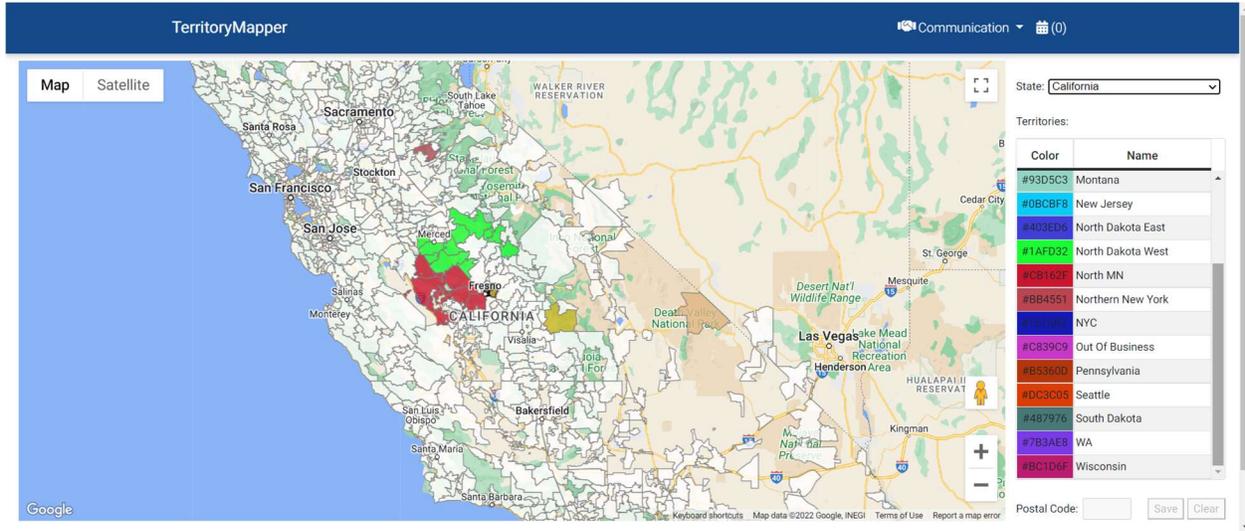
Range Start  
|

Range End

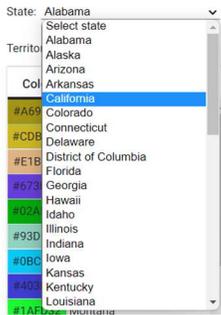
Name

## Using the Map to Assign Territories

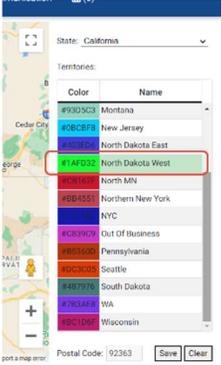
Once you have built out your territories, you can add more zip codes to them using the Territory Mapper.



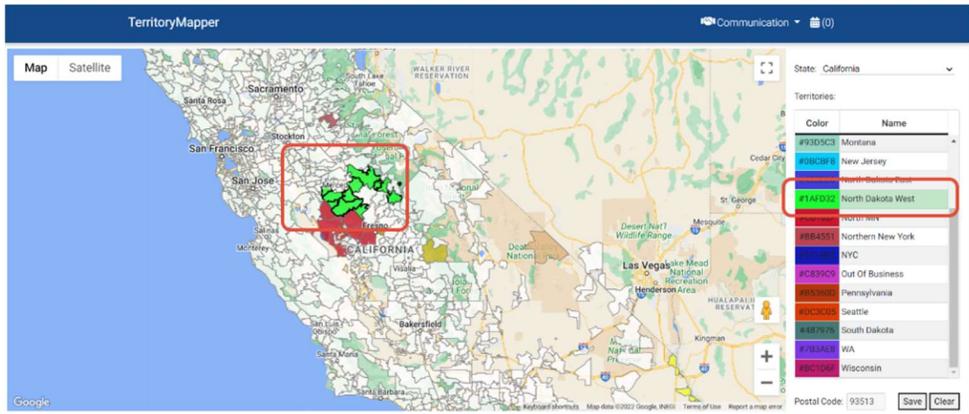
1. Once the map is open select a state from the drop down.



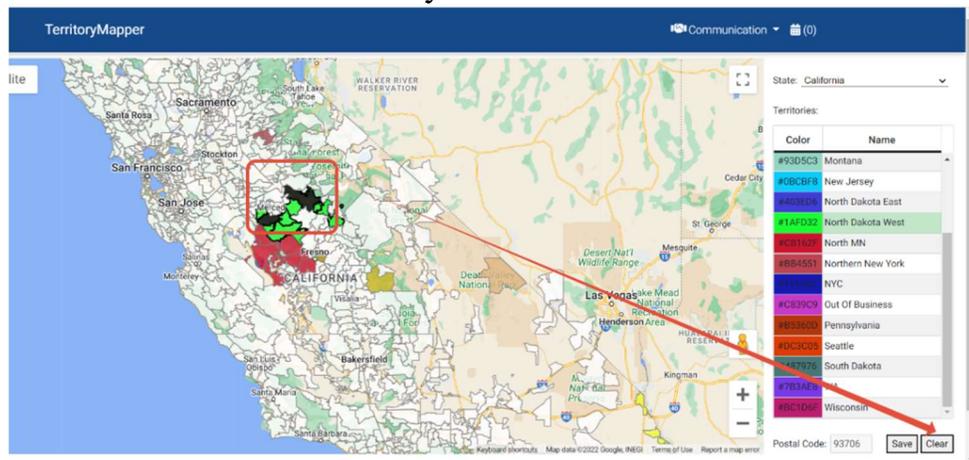
2. Click on the territory you want to add zip codes to.



3. Once the territory is highlighted then click on map to add the zip code and press save. The newly added zip code will be color coordinated with territory.

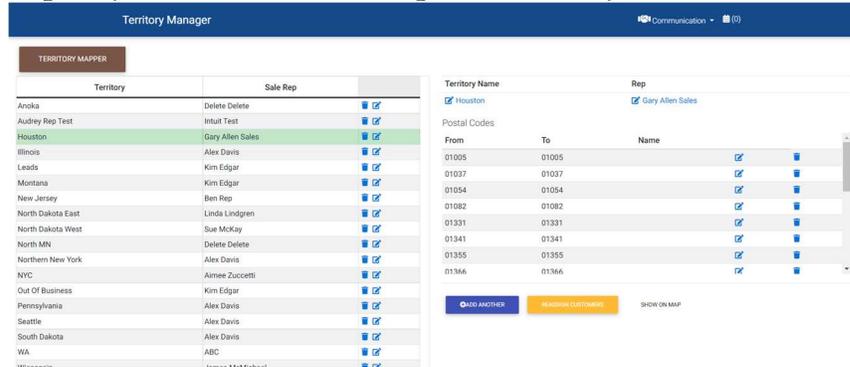


- If you want to unassign a zip code, click on the map, click on the area, and then select clear at bottom of the territory list.

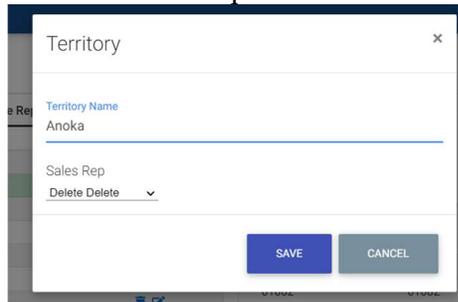


## Reassigning a Rep to a Customer

1. If at some point you need to reassign a territory with customers to another rep, click into the territory. **Note that before you reassign the customers, you must first remove the old rep, as you cannot have two reps in a territory at the same time.**



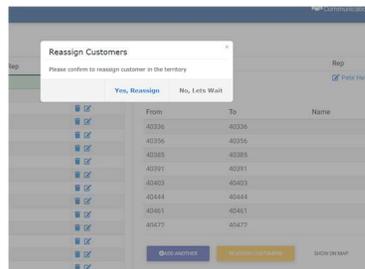
2. Click on the blue pencil for the rep. You will then select the new rep you want to assign the territory and customers to. Make sure to press save.



3. Once you have chosen the new rep you will now reassign customers to that rep and territory.



4. When you click reassign customers another window will pop up confirming this the action you want to take.



5. To view individual territories in map form, simply click on the name of the territory and on the bottom right of the window, click "Show on Map". This will open the map and will highlight that rep's territories, by zip code, in green (where sales have occurred in the last 12 months) and red (where sales haven't occurred in more than 12 months).