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Online Territory Planner

User Guide

A Mercator GeoSystems Publication

AMENDMENT RECORD

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18/7/07	i	MG	Initial version
3/8/07	i-2	MG	Updates re: print, label, identify & loader
8/8/07	i-3	MG	Updates re: Auto function
23/10/07	i-4	MG	Updates re: doc bug #62
11/12/07	i-5	MG	Updates re: proxy & add location function.

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INTRODUCTION

Welcome to the Mercator GeoSystems Online Territory Planner User Guide. This document will describe the major features of our new Territory Planning software and show you how to get the best from our product.

The product allows you to create, manage and alter your organisation's sales territories using our easy to install and use software.

Our innovative approach to developing and deploying this software means that there are no additional resource overheads for your organisation, no I.T requirements other than a completely standard Windows desktop and no additional servers, services or skills requirements. Along with our 'pay as you go' pricing model territory planning has never been simpler, easier or cheaper!

We hope you enjoy reading this guide, and if you have any questions don't hesitate to get in touch using any of the means described in Appendix A.

SOFTWARE INSTALLATION

The software has been designed to be easy to install requiring no additional I.T support or 3rd Party components to be installed. This helps both you and us keep costs low and complexity to a minimum.

The software is initially installed via your web browser as a 'one time' operation and from then on is accessible via your Programs menu like any other product.

To install the software please visit this web page using Internet Explorer (version 6 or 7 are both fine) :

<http://www.mercatorgeosystems.com/mgOnlineTerritoryPlanner/>

You will see this simple page in your browser :



Illustration 1: Installation web page

If there is a message about any required software then follow the appropriate link to install this software. Most Windows XP service pack 2 or greater machines have all the required software present already.

Click on the **Install** button to install the software.

After a short pause the software will begin downloading and install itself on your computer. It is safe to accept the software even though it may be described as being from an 'Unknown Publisher'.

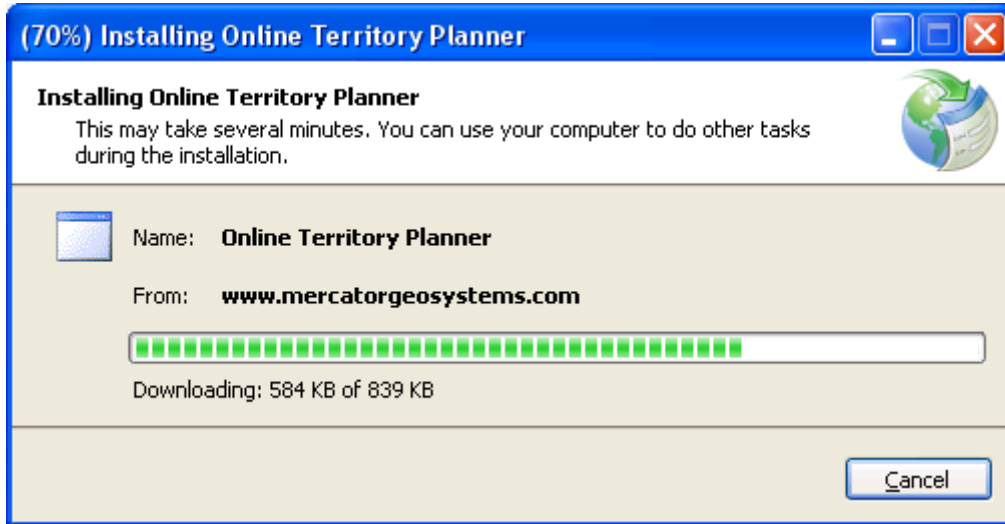


Illustration 2: Downloading the software

When the software has finished installing it will automatically start and present you with the logon window :

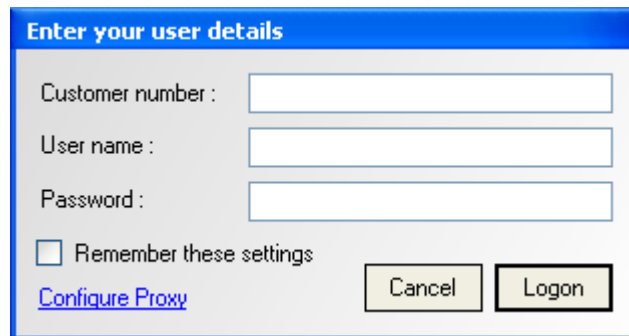


Illustration 3: Logon window

Software updates

The software includes the ability to update itself if a new version is made available. This enables you to very quickly receive new features or bug fixes. Each time you use the software it will check our server to see if a new version is available. If it is, you will be presented with a screen like this :

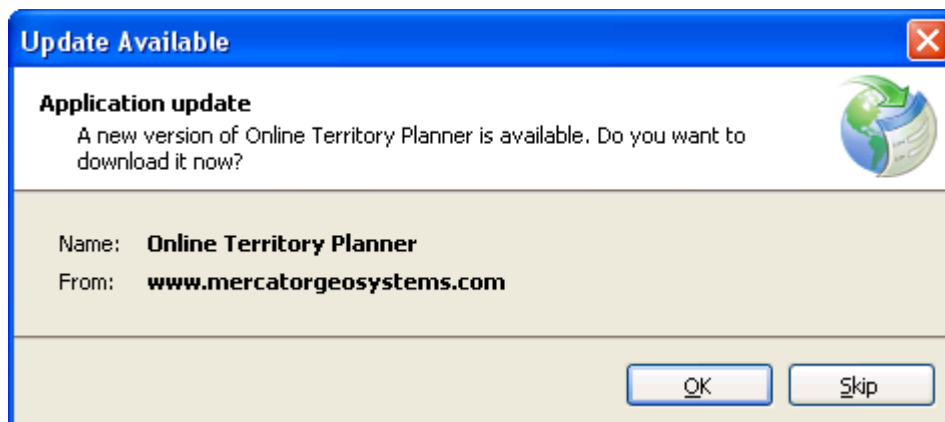


Illustration 4: Update available window

Click on **OK** to install the update.

Removing the software

If you wish to remove the software from your computer it can be removed like any other piece of software. Simply go to your Windows Control Panel and choose 'Add / Remove Programs'.

The software is listed simple as 'Online Territory Planner'.

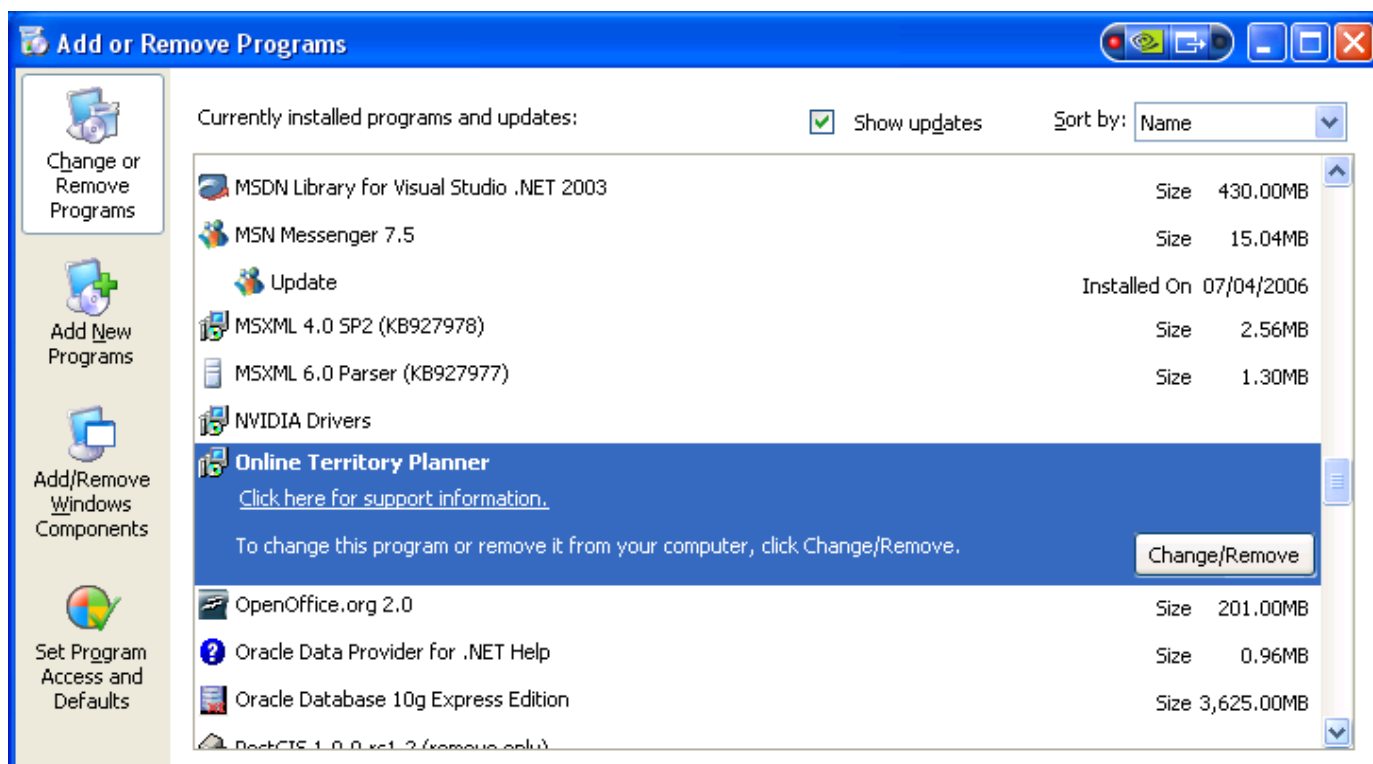


Illustration 5: Using Add / Remove Programs

Click on the title (Online Territory Planner) and then on **Change/Remove**.

On the next window select 'Remove the application from this computer' and click on **OK**:

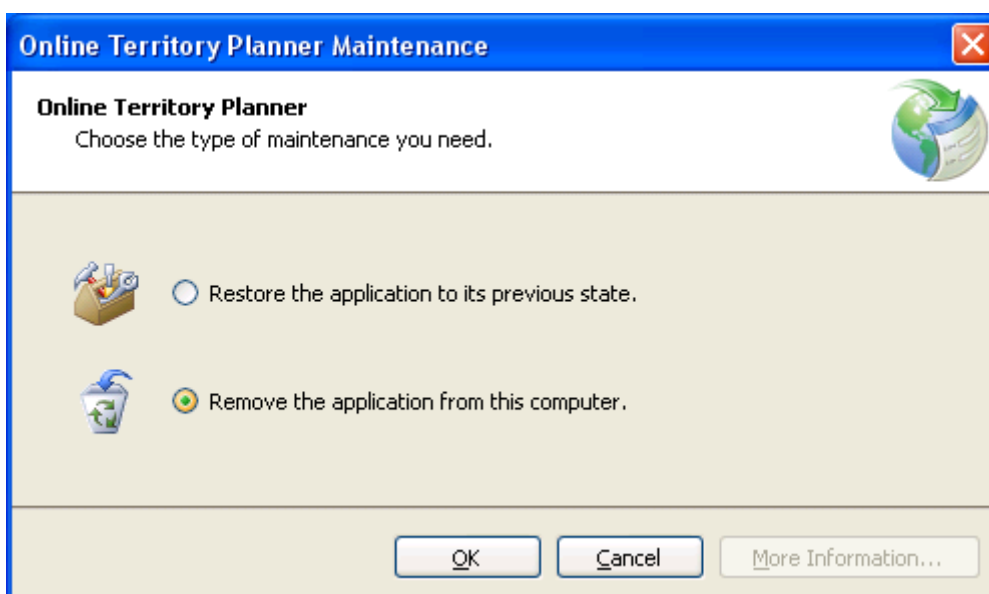


Illustration 6: Remove the application from this computer.

STARTING TO USE THE SOFTWARE

As part of your sign up process you will have received three important pieces of information :

- 1) Your customer number,
- 2) One or more user names,
- 3) One or more passwords.

You will need this information to proceed. If you do not have this information, or require an evaluation logon to test our software with, then please contact us via any of the means described in Appendix A.

Launch the software by finding the application in your 'Start' menu here :

Start → All Programs → Mercator GeoSystems Ltd → Online Territory Planner

The logon screen will appear :

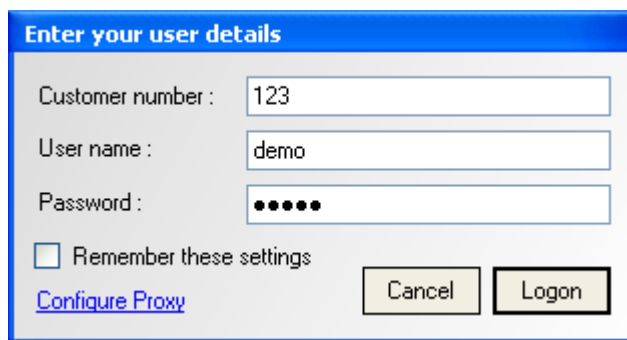


Illustration 7: The logon window

Tip : you can check the 'Remember these settings' option so that you do not need to enter your password each time you use the software.

Configuring a Proxy Server

If your organisation uses a 'proxy server' to connect to the Internet you can enter details of the proxy server by clicking on the Configure Proxy link on the logon page.



Illustration 8: Configuring a proxy server

After a short delay the application's main screen will appear :

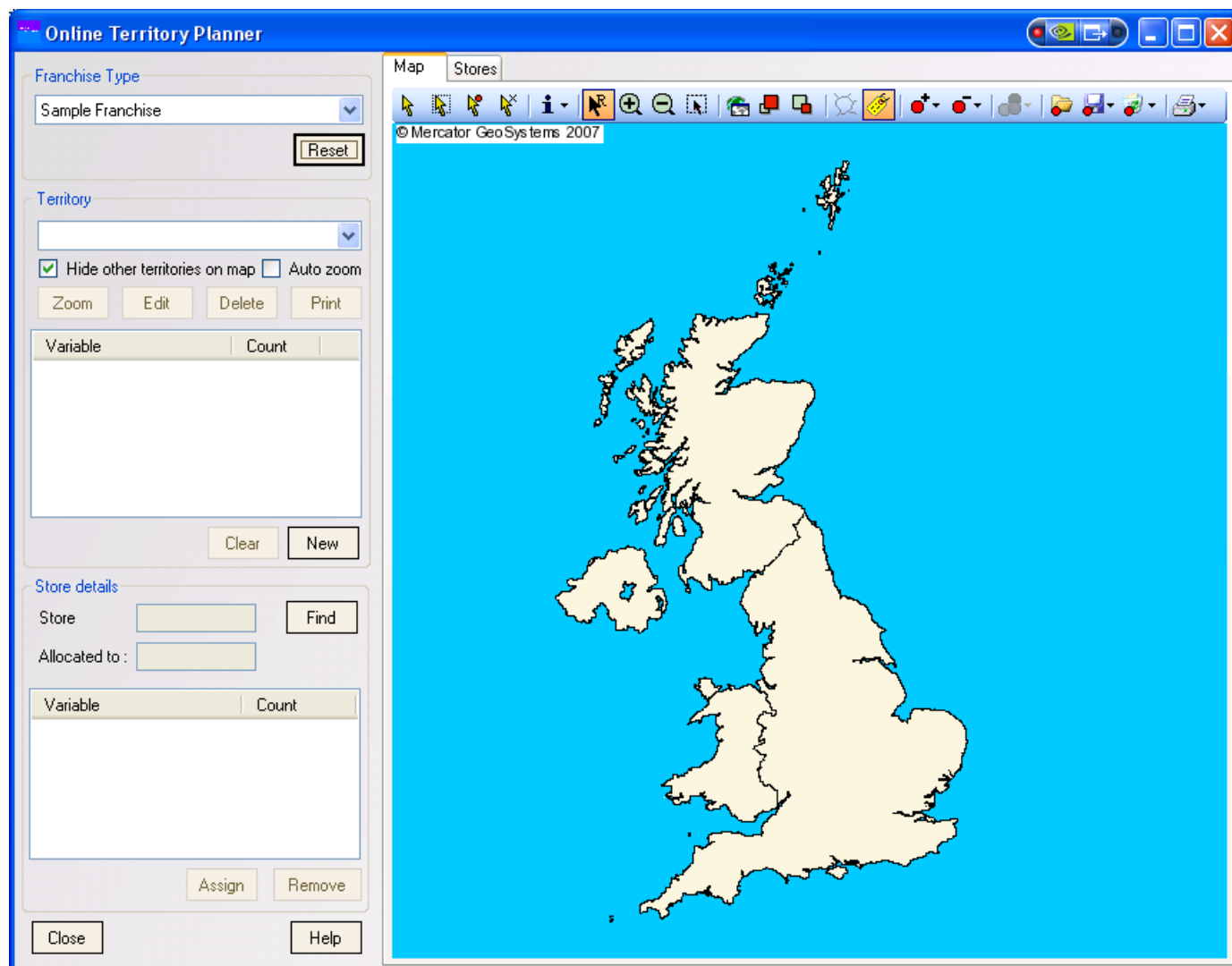


Illustration 9: Application main screen

Broadly speaking the controls on the left portion of the window relate to territory operations, whilst the right hand side of the screen relates to map functions such as zooming in or out.

Your window may look slightly different depending on the options you have selected when signing up for the software.

At this point it is also worth mentioning the two different 'modes' that the software can operate in; *area mode* and *point mode*.

Area mode is where the software is being used to allocate existing areas, such as Postal Sectors, to territories. This is often for the purposes of creating and maintaining marketing or sales areas, but not exclusively so. Postal Sectors can obviously not be created or deleted, it is merely the 'allocation' that is changed.

Point mode is where locations proprietary to your business are allocated between territories. For example this could be a series of stores that are allocated to an area manager, or a number of customer locations that require visits by a local representative. Points can be added, deleted or reallocated as required.

You will have decided which mode suits your business best when you signed up for the software, and any differences in the way the software is used will be highlighted where appropriate in this document.

Franchises explained

The software can help you maintain territories for multiple franchises. For example your organisation may have multiple franchises, and hence territories, for different operations within the business. To change the franchise the software is currently working with select it from the drop-down list in the top left of the screen.

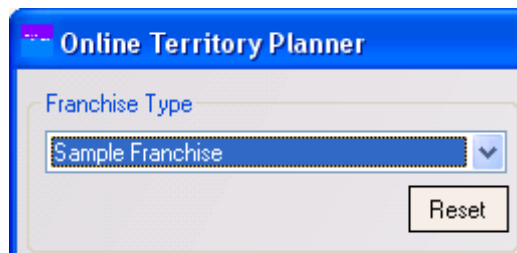


Illustration 10: The franchise selector

To remove all territories, points and any other details for a specific franchise first select the franchise and then click on the **Reset** button. *There is no way of undoing this action so be sure that you want to do this.*

If your organisation does not use franchises then there will just be one franchise listed and you can effectively ignore this section.

Creating a new Territory

Creating a new Territory for a franchise is very simple. You just click on the **New** button and fill in the details for the new territory.

A screenshot of a dialog box titled "Territory Details". It contains several input fields: "Territory name:" with a text box, "Territory manager:" with a text box, "Account #:" with a text box, "Colour:" with a drop-down menu showing "<<None>>", and "Notes:" with a large text area. At the bottom right, there are "OK" and "Cancel" buttons.

Illustration 11: The new territory form

The form fields are pre-set and cannot be changed at this time. A 'Notes' box is included to allow you to include any business specific information relating to this territory. The colour drop-down allows you to choose the colour the territory will be shaded in when viewing it on the map.

In 'point mode' this dictates the colour that the points will be shaded in for this territory. For 'area mode' it is used to define the colour the areas allocated to the territory will be coloured in.

The only required field is the Territory name. When you are done click on **OK** and the territory will be created. Note that at this time the territory cannot be viewed as no points or areas have been assigned to it.

Amend the details for a Territory

To amend any of the details that were entered when the territory was created above, first select the territory from the drop-down list, and then click on the **Edit** button. The same form as above will be displayed with the appropriate details filled in which can then be amended as required.

Removing a Territory

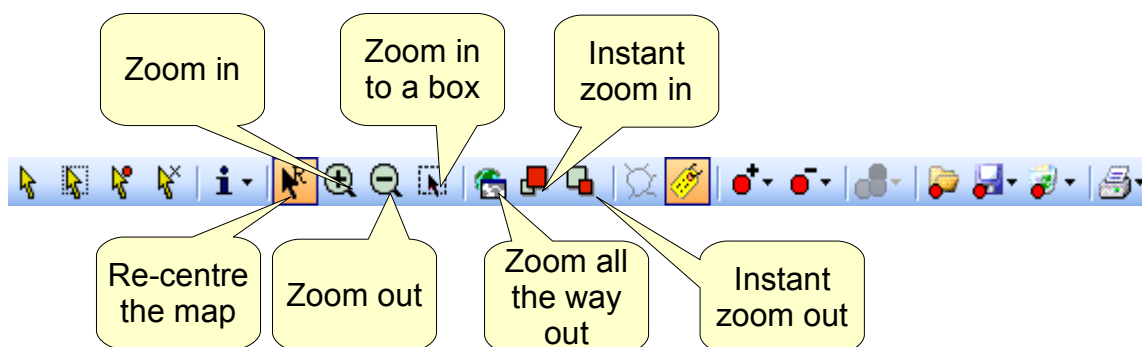
If a territory is to be removed from the system completely then you can do this by clicking on the **Delete** button.

In 'area mode' this will cause any allocated geography to be 'unassigned' and shaded appropriately. In 'point mode' points will also be no longer assigned to the territory and free for assigning elsewhere.

Similar to deleting a territory is *clearing* it. Clearing is the same as deleting except that it leaves the territory in the list of territories so you can assign new points or areas to it if required. *Any points or areas allocated to the territory are 'unassigned' and available for assigning elsewhere.*

Map navigation

Navigating the map is a simple task performed by selecting one of the map buttons located in the centre of the tool-bar above the map.



The map buttons operate in two different ways. The first four require you to click on the map to initiate the 'action' after selecting them on the tool bar :

Re-centre the map re-draws the map with the new centre of the map at the location you click.

Zoom in zooms the map into where you click on the map

Zoom out zooms the map out from where you click.

Zoom to a box requires you to 'drag' a rectangle onto the map to define the area to zoom into.

The second group perform their action immediately when you click on them :

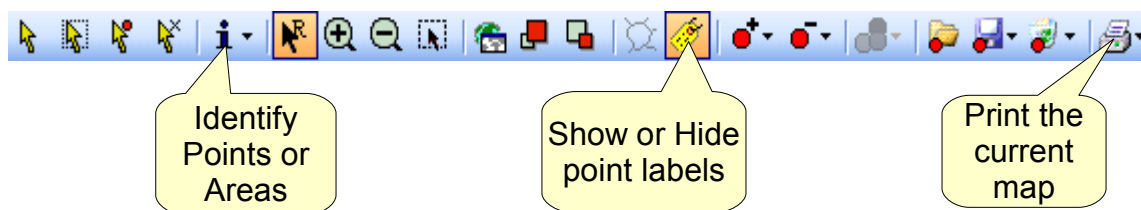
Zoom all the way out shows the entire country in the map window.

Instant zoom in immediately zooms the map in to a point at the centre of the current map.

Instant zoom out immediately zooms the map out from a point at the centre of the current map.

Other Map Functions

Additional buttons also control the appearance or behaviour of the map.



Identify Points or Areas enables you to click on the map and receive some information about the location you clicked upon. *Depending on whether you are planning 'points' or 'areas' you will receive different information.*

For example :

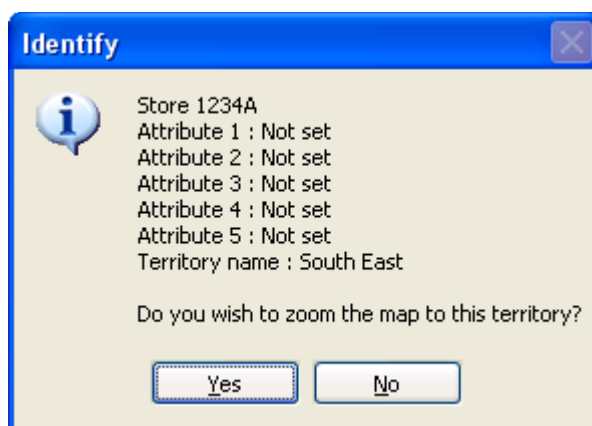


Illustration 12: The Identify tool

Attributes can be set using the 'Point loader' tool described below. When a point or area has been identified you also have the option of zooming the map to show the entire territory that the point or area is assigned to.

Show or Hide point labels enables the text used to label your points on the map, such as stores or outlets, to be hidden or displayed. Sometimes where many points are located in close proximity to one another it can be useful to remove the labels for clarity. *Note that labels will only appear when you have zoomed in to the map some way. Using the button when labels would not normally be visible will have no effect.*

Print the current map will enable you to print the map to either A3 or A4 sized paper by creating a PDF document with the map included on it. Note that the map you see and the map that appears will vary slightly as the map in the application is square whereas the map in the PDF is rectangular. The changes required to make the map 'fit' may require some tweaking of your map to ensure that the output is as you wish.

The remaining buttons on the tool-bar will be explained later.

BUILDING TERRITORIES MANUALLY

Territories can be built manually using the map to select the items that will be allocated to a territory. The method involved in creating territories for points or areas differs substantially so will be dealt with separately here.

Building a territory of point locations

Before assigning locations to your territory you will need to ensure you have at least one territory created, and selected, before continuing. If you have not created any territories yet then follow the steps above. The exception to this rule is where territories are to be created automatically when importing a file of locations, further details of which can be found further on in this document.

Now, navigate the map to the area of the country you are interested in creating your territory for. In this case we have navigated to the South East of England :

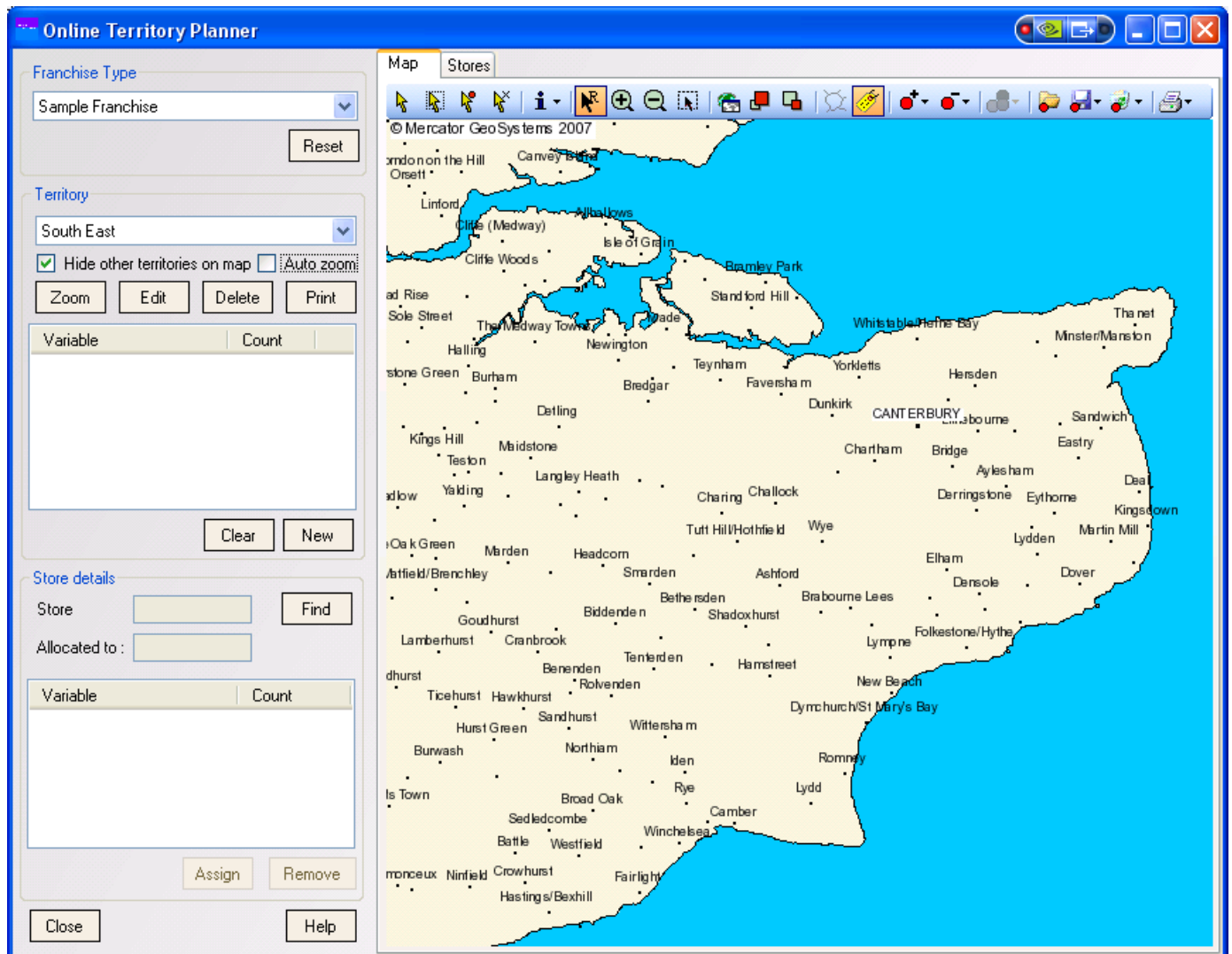


Illustration 13: Zoomed in to an area

Now we choose the 'Add a point' tool on the tool-bar and select the appropriate kind of point to add. When adding points there are three types of points that can be added. Although the terminology can be changed the three kinds relate to 1) the points that are being 'managed' as part of the territory, 2) the point that represents the 'manager' of the territory and 3) 'other' points such as potential stores or outlets. The latter two types of point are optional and do not need to be used if not required.

In this case we can add a 'Store', 'Area Manager' or 'Potential Store'.

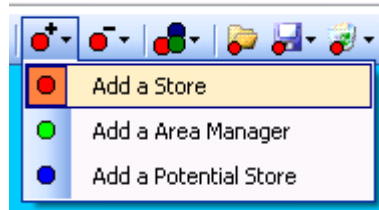


Illustration 14: Adding a point

We will add a 'Store'. With this tool selected, we now click on the map at the location of the required store. In this case we know we have a store in the town of 'Wye' in the centre of the map so we click on it. When we do this a prompt appears for a name, or label, for the point :

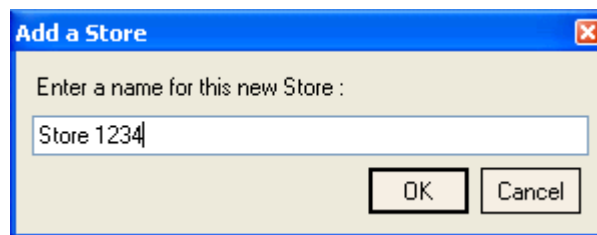


Illustration 15: Entering a point name

Click on **OK** and the point will be created, added to the map, assigned to the selected territory and shaded in the appropriate colour. This step can be repeated a number of times to create your store locations.

In this case we have added a number of stores to our territory, and also an Area Manager. The points are a circle shape and are shaded in the colour selected when we created the territory, and the Area Manager is a star shape, also the same colour.

This is how our territory looks now :

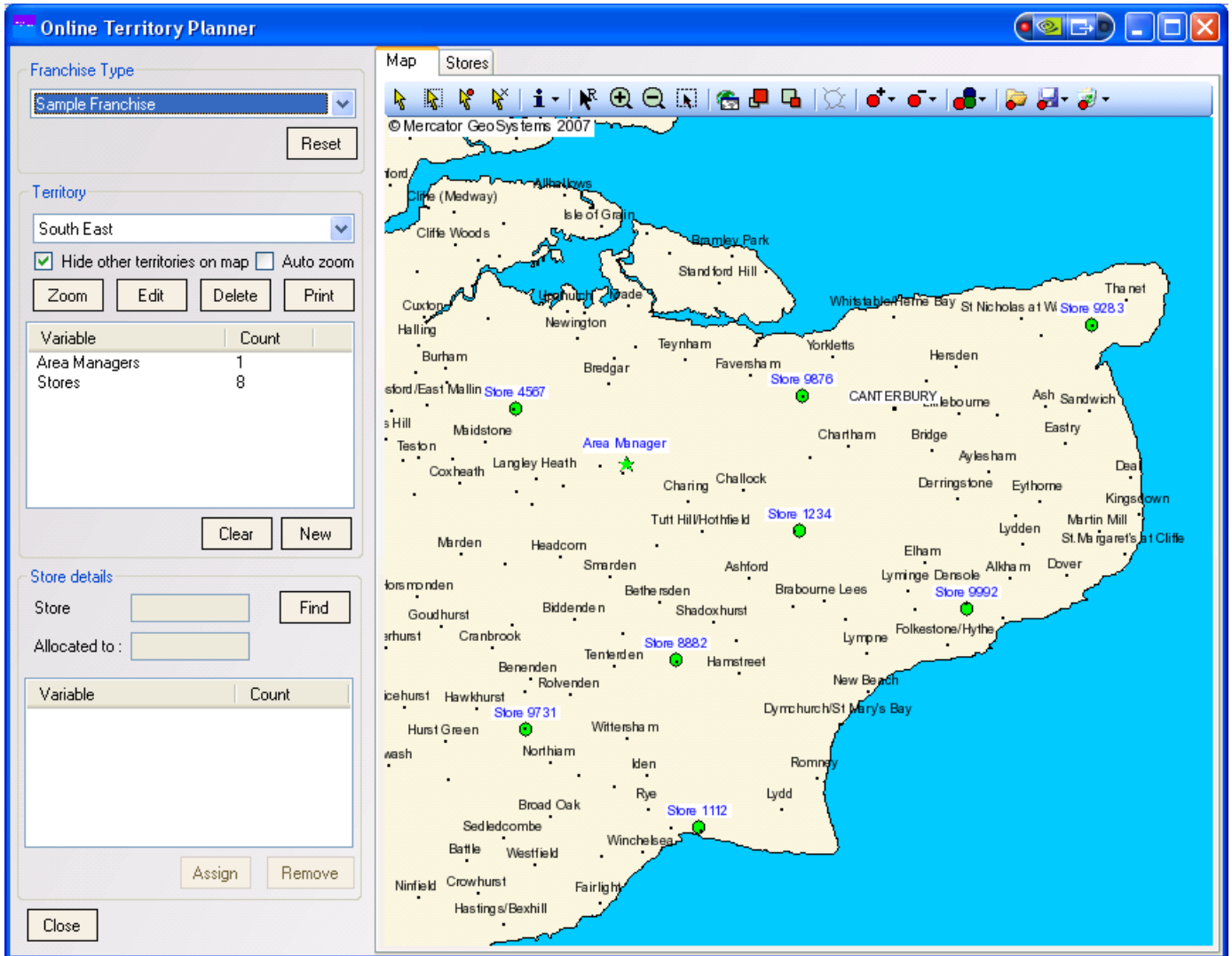



Illustration 16: Building a territory

The following section describes how to build a territory from areas, which you may like to skip if this is not appropriate for you.

Adding points using a postal code

If you know the postal code of the location you are wanting to add, and your system has been configured to allow this, then you can add points using this postal code. Click on the '**Add a location using UK Postal code**' button  on the toolbar, just to the right of the buttons described above.

Using this function you can repeatedly add points if you have their postcodes. If you have a large number of locations then you may be better off using the 'Load points from a file' function described below.

After clicking on the toolbar button the following form will be displayed :

Add a location

Choose the type of location your are adding, enter a map label and the location and then press 'Add'.

Type :

Name / map label :

UK Postal Code :

Add to current territory

Illustration 17: Add a point using Postal code

First, select the type of point you are adding. This will vary according to your specific configuration but could include such types as 'Store', 'Client', 'Customer', 'Manager' etc. Next, enter the label to use when displaying the point on the map and finally enter the Postal Code.

If you wish to have the point allocated to the current selected territory then tick the '**Add to current territory**' box before clicking on **Add**.

The form will remain displayed on the screen after clicking Add to allow you to enter multiple locations. When you have finished entering locations, click on **Close** to hide the form and return to the main application.

Building a territory of areas

Before assigning locations to your territory you will need to ensure you have at least one territory created, and selected, before continuing. If you have not created any territories yet then follow the steps above.


This example is based on building a territory from Postal Sectors. We have created a territory and have navigated the map to the South East of England :

The screenshot displays the 'Online Territory Planner' application window. The interface is divided into several sections:

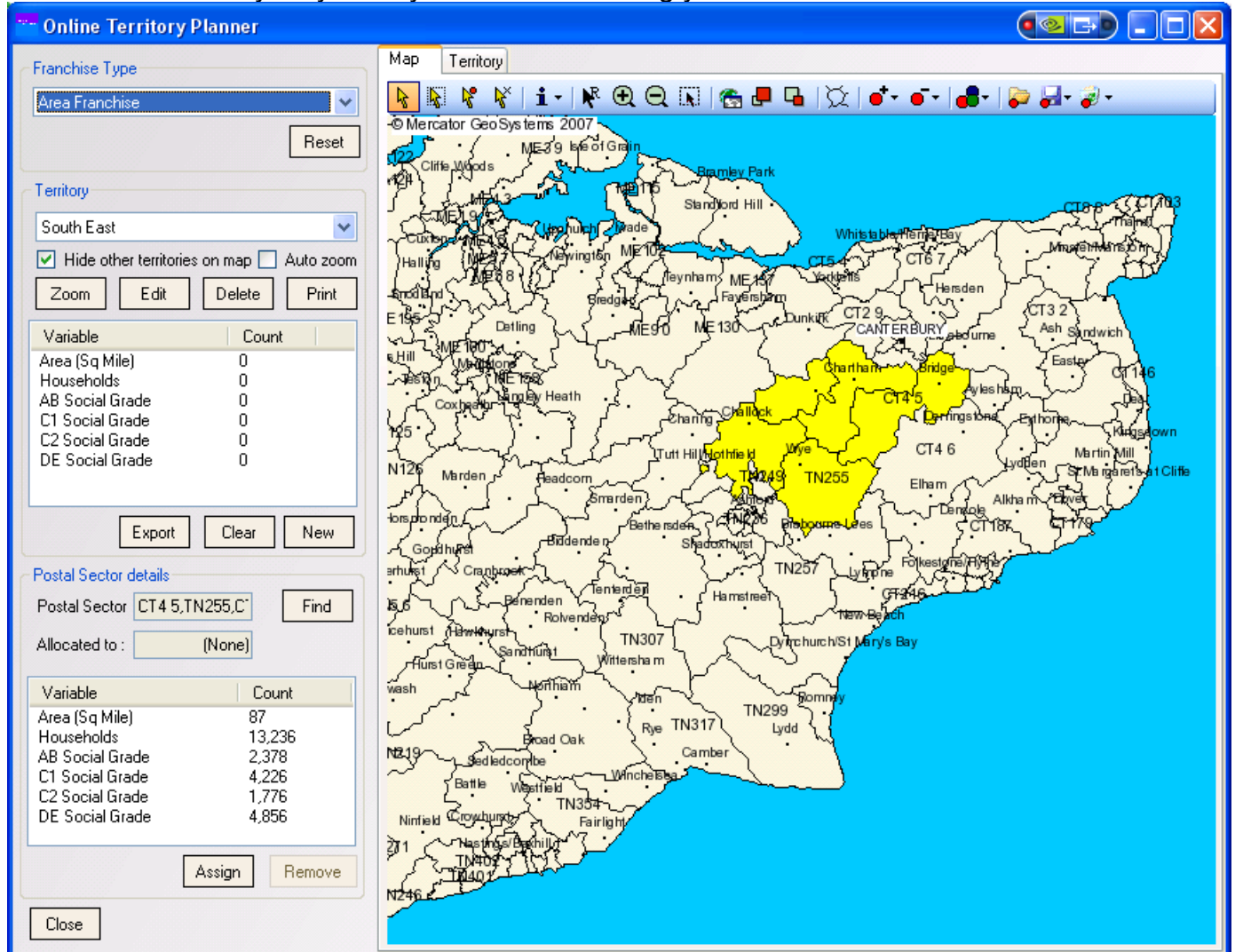
- Franchise Type:** A dropdown menu set to 'Area Franchise' with a 'Reset' button.
- Territory:** A dropdown menu set to 'South East', a checked 'Hide other territories on map' checkbox, and an unchecked 'Auto zoom' checkbox. Below are 'Zoom', 'Edit', 'Delete', and 'Print' buttons.
- Summary Table:** A table with two columns: 'Variable' and 'Count'.

Variable	Count
Area (Sq Mile)	0
Households	0
AB Social Grade	0
C1 Social Grade	0
C2 Social Grade	0
DE Social Grade	0
- Postal Sector details:** A section with a 'Postal Sector' input field, a 'Find' button, and an 'Allocated to:' input field. Below is another empty table with 'Variable' and 'Count' columns, and 'Assign' and 'Remove' buttons.
- Map:** A map of the South East of England showing various postal sectors. A red outline highlights a specific territory area. The map includes a toolbar with navigation and zoom controls.

Illustration 18: Zoomed in to the territory area

Now that we have zoomed in the areas (Postal Sectors) are now visible and can be clearly seen. Allocating areas to a territory can either be done individually or in 'bulk'. To add areas individually click on the 'Select' tool  on the tool-bar.

You can now click on areas on the map to select them as potential candidates for assigning to a territory. *Note that selecting them does not actually assign them.* To select multiple areas press and hold the Ctrl key on your keyboard whilst making your selections.



Online Territory Planner

Franchise Type: Area Franchise

Territory: South East

Hide other territories on map Auto zoom

Zoom Edit Delete Print

Variable	Count
Area (Sq Mile)	0
Households	0
AB Social Grade	0
C1 Social Grade	0
C2 Social Grade	0
DE Social Grade	0

Export Clear New

Postal Sector details

Postal Sector: CT4 5, TN255, C Find

Allocated to: (None)

Variable	Count
Area (Sq Mile)	87
Households	13,236
AB Social Grade	2,378
C1 Social Grade	4,226
C2 Social Grade	1,776
DE Social Grade	4,856

Assign Remove

Close

Illustration 19: A number of areas selected on the map

Here a number of areas have been selected in the centre of the map and are clearly shaded in a yellow colour. In addition some summary statistics are available for this selection in the bottom left of the application :

Variable	Count
Area (Sq Mile)	87
Households	13,236
AB Social Grade	2,378
C1 Social Grade	4,226
C2 Social Grade	1,776
DE Social Grade	4,856

Illustration 20: Selection statistics

This data can be used as a basis for deciding whether or not to assign the selected area to a territory.

When you are happy with your selection, you can click on **Assign** to assign these areas to the current selected territory.

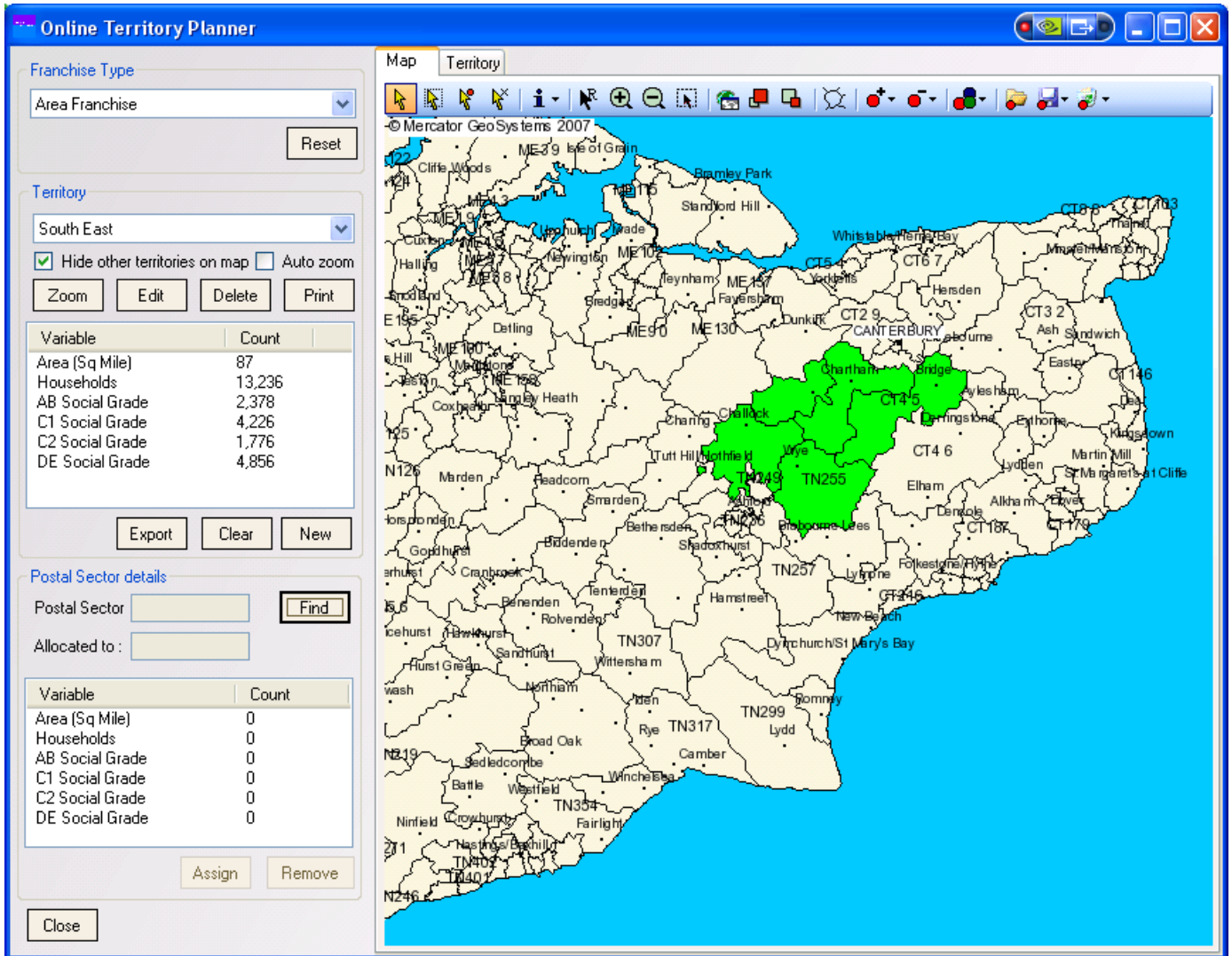


Illustration 21: Assigned area to a territory

We can now clearly see the territory, shaded in the green colour we chose for it when creating the territory.

To add areas in 'bulk' to a territory click on the 'Select using a box' tool . Then, using the mouse, click and drag a rectangular area covering the area you wish to select 'en masse'.

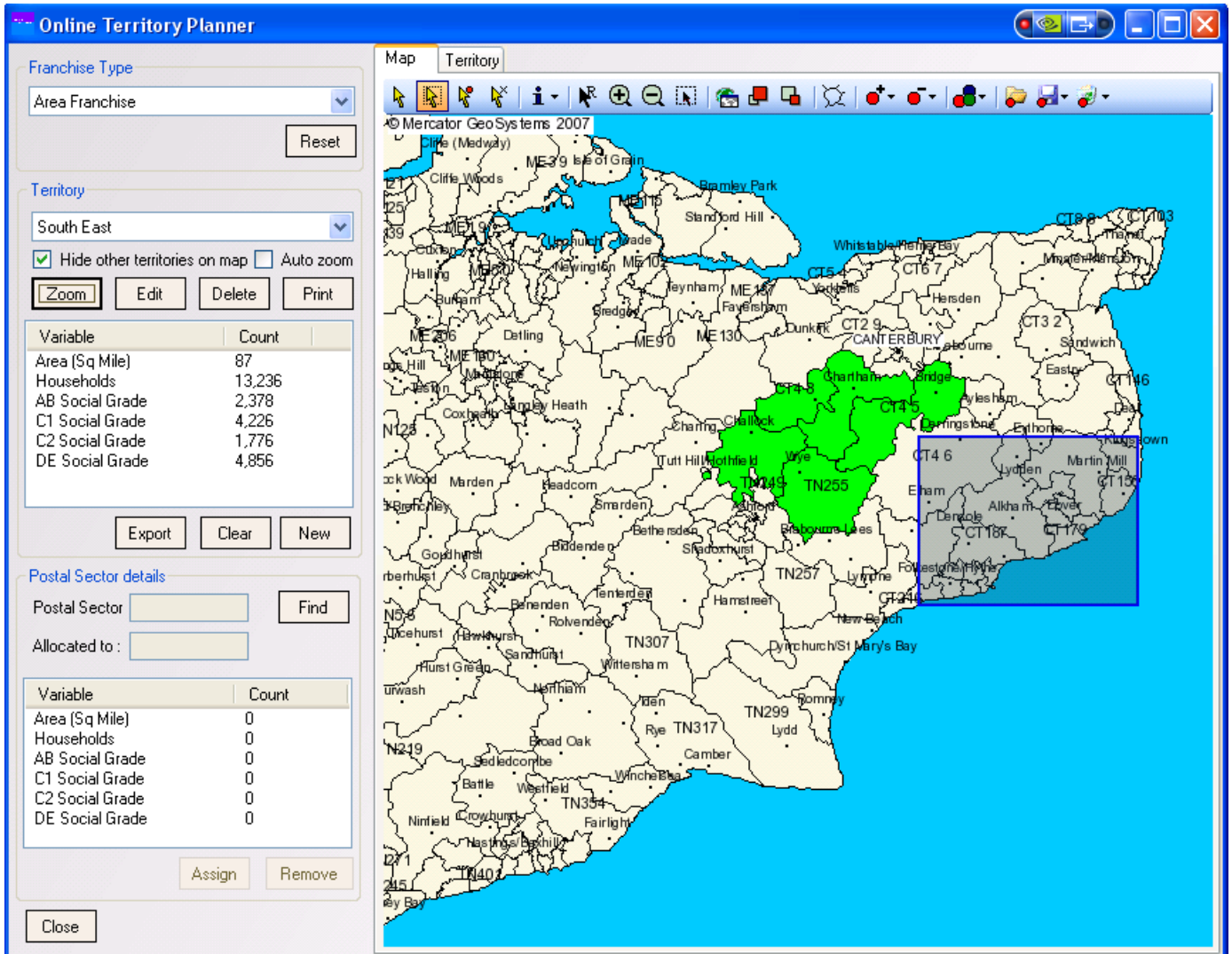


Illustration 22: Selecting areas using a box

When the left mouse button is released, the areas in or partially within the rectangle will be selected :

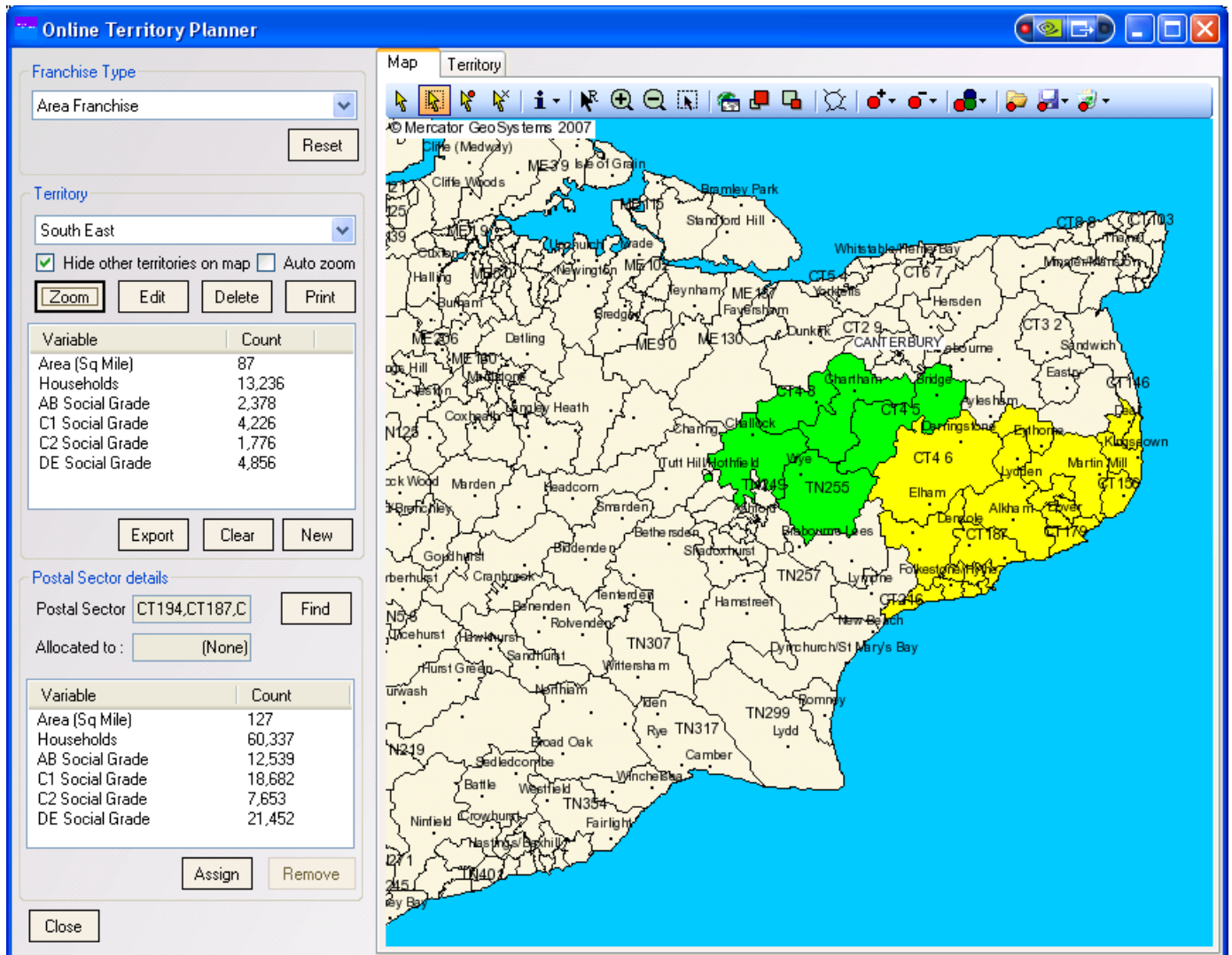


Illustration 23: Selected areas

This new selection can then be added to the territory if required, or extended by dragging a new box whilst holding the **Ctrl** key down.

LOADING POINTS FROM A FILE

If you have existing points defined in a spreadsheet or database you can load these points into our software.

When loading location data from a file you have two options for how the actual location of the point is to be found. The first option is to use some kind of location 'name' such as a Postal Code. Your method of identifying locations will have been selected when you signed up for the software. The second option is to use map coordinates if you have them available.

To load points click on the 'Load points from a file' tool . This will open the Load Data form :

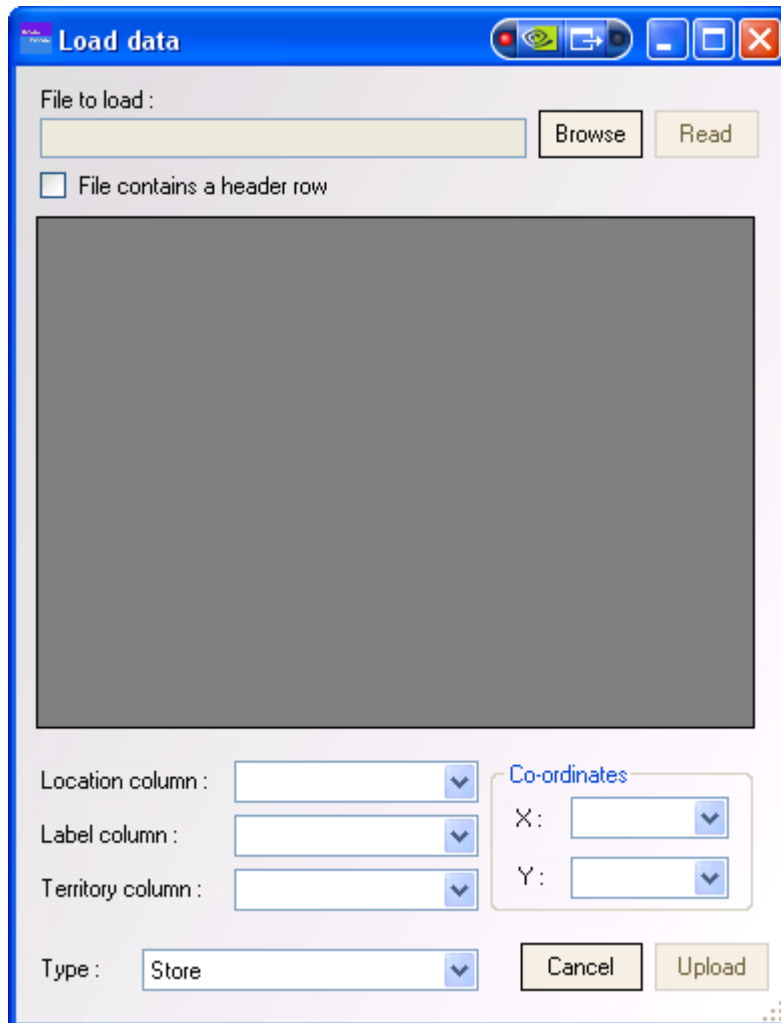


Illustration 24: Loading point data

Your data should be in a comma separated text file, which is easily exported from Excel, Access or other document types. You can include a header row if you wish as it may make the import easier.

Your data can be in a number of formats. At a minimum you will need either a 'location' column (such as a postcode) and a 'label' to label the point with on the map or alternatively a pair of X & Y coordinates and a map label.

You may also, optionally, include an existing territory identifier (see below for more on this) and up to 5 additional 'attributes' which will just be loaded with your points. These 'attributes' will be loaded into the database and will be visible when using the 'Identify' tool. They will also be exported back 'out' of the system when you 'Export points to a file'.

Firstly, use the **Browse** button to find your file.

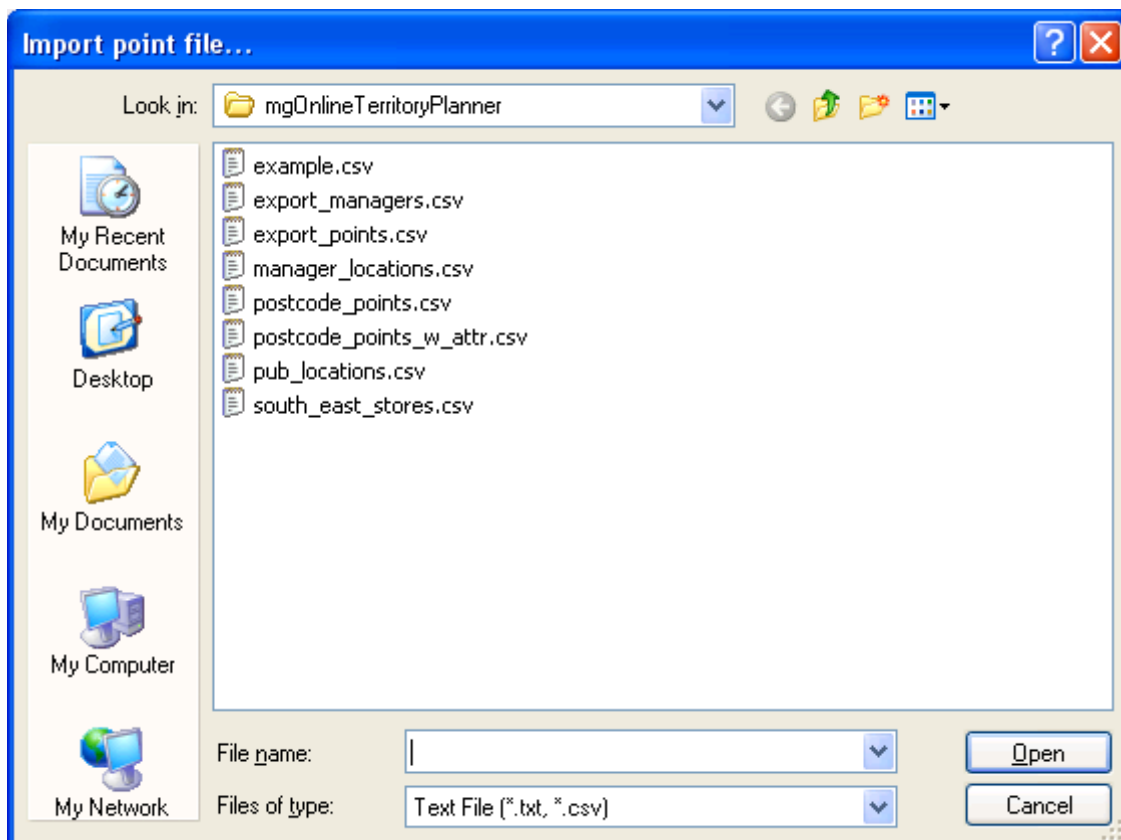


Illustration 25: Browsing for a file

When you have found your file, click on **Open**. If the file includes a header row (a row in the file that just lists the column names) then check the 'File contains a header row' box. When you are ready, click on the **Read** button to actually load the file into the 'holding grid'.

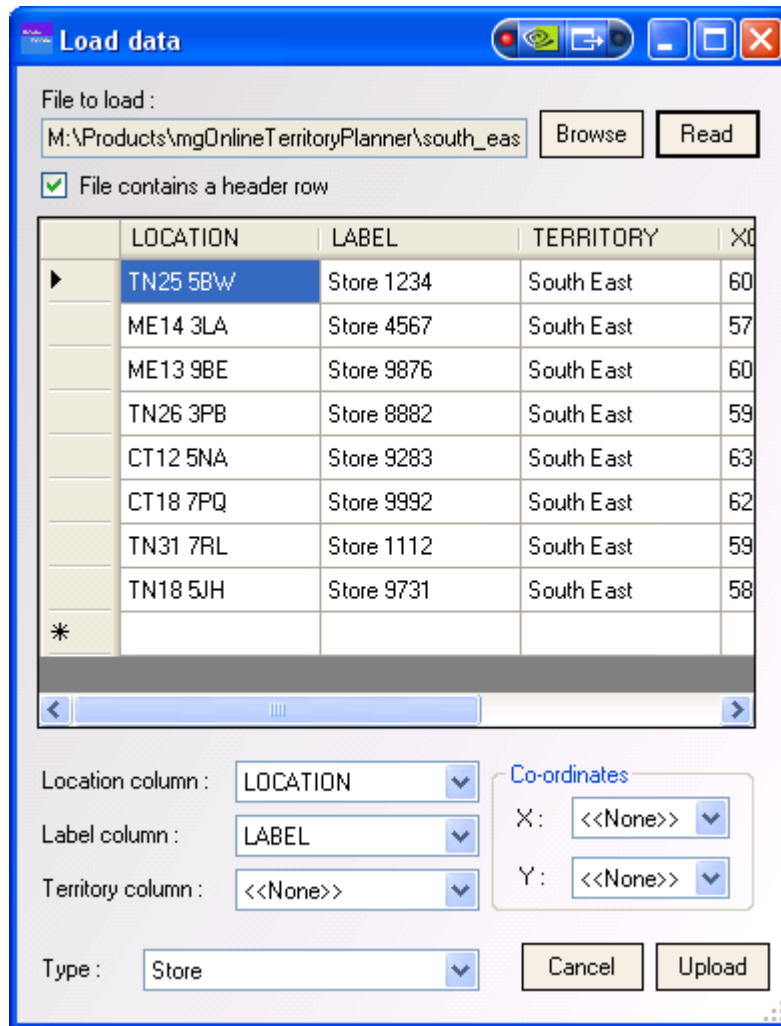


Illustration 26: Data being loaded

When the data is loaded into the central 'grid' you must then select which columns contain which piece of information using the drop-down lists in the bottom half of the window.

If you specify a 'Location column' and X & Y coordinates then the X & Y coordinates will be used to load the data.

Territory considerations

When loading points there are a number of scenarios with respect to how the points are (or are not) allocated to territories depending on whether or not you have created any existing territories.

- If you have not created any territories, and you do not include or specify a 'Territory column', then points will be loaded and not assigned to any territories. They will need assigning manually later.
- If you have created some territories, but have not included or specified a 'Territory column' then all points will be loaded into the territory you have currently selected on the main window of the application.
- If you have not created any territories, and have specified a 'Territory column', then a new territory will be created for each of the territory identifiers and assigned a random colour. The points will be assigned to the appropriate territory as specified in the file.
- If you have created some territories, and have also specified a 'Territory column', then, if when loading points the appropriate territory identifier already exists then the point will be assigned to it, otherwise a new territory will be created, as above.

If you are using the system in 'point mode' then you can load your current territory definitions along with the points. In 'area mode' then points are said to belong to territories if they are 'contained' by them so an existing territory identifier is not relevant.

When you have selected the correct columns that match your data, you can select the kind of point that you are loading. In this case we are loading 'Stores' (your list will contain whatever point types are relevant for your business).

Each point is loaded and a progress bar displayed to indicate when the load will be completed :

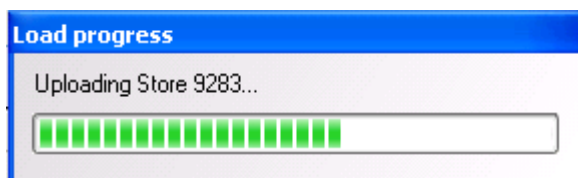


Illustration 27: Loading points progress bar

If you are loading points using a 'Location column', such as a Postal code, and the location cannot be found then you will be warned about this at the end of the load and will need to create the point manually.

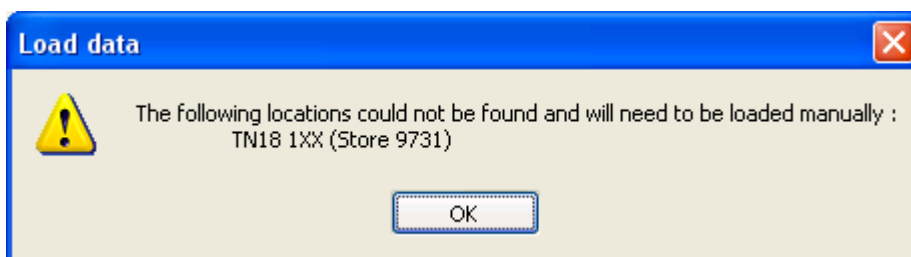


Illustration 28: Warning about points that cannot be loaded

Loading tip... When you have read your file into the 'grid' using this method, you can actually add, edit and remove rows in the grid.


To add a row, simply fill in the details on the bottom, blank, row.

To edit a row, double click on the grid 'cell' and type in the new value

To remove a row, click on the row 'side-bar' and then press the **Del** key on your keyboard.

Note : making changes to the rows in the 'grid' does not make any changes to your original text file.

Exporting points out of the system

To export points out of the system to a CSV file on your computer use the 'Export points to a file' button on the map tool-bar  to select the type of point you wish to export, and then choose a location to save the file to.

If you loaded any additional 'attributes' when you loaded you data above then these will be exported back out now also.

OTHER TERRITORY FUNCTIONS

With your territories created there are a number of useful functions that can be performed using the software. The buttons and controls relating to these operations are in the Territory panel on the main application window.

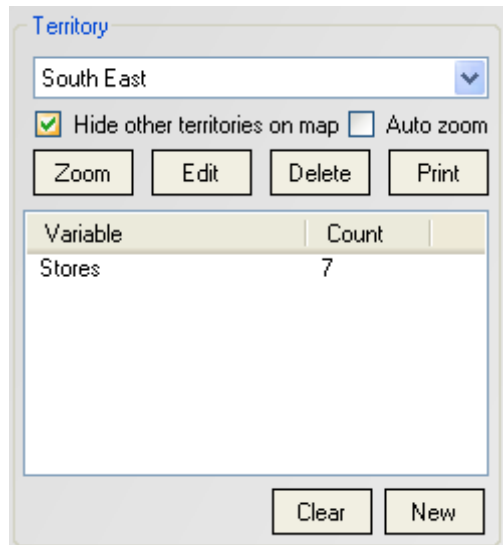


Illustration 29: Territory functions

Some of these buttons have already been described above, but the remainder will be documented here.

The drop-down is a list of territories for the current selected franchise. Changing the selected territory will firstly re-load the list of 'statistics' for the newly selected territory, and secondly set it as the 'target' for any allocation / de-allocation activities (see below).

Territory map zooming

The **Zoom** button will zoom the map to show all the units allocated to the territory that is currently selected. If the 'Hide other territories on map' check-box is ticked then any neighbouring territories *will not* be visible. This is useful when territories are densely packed to show the territory more clearly or for presentation purposes when we just want to focus on one particular territory. *See the illustrations below for the result of this.*

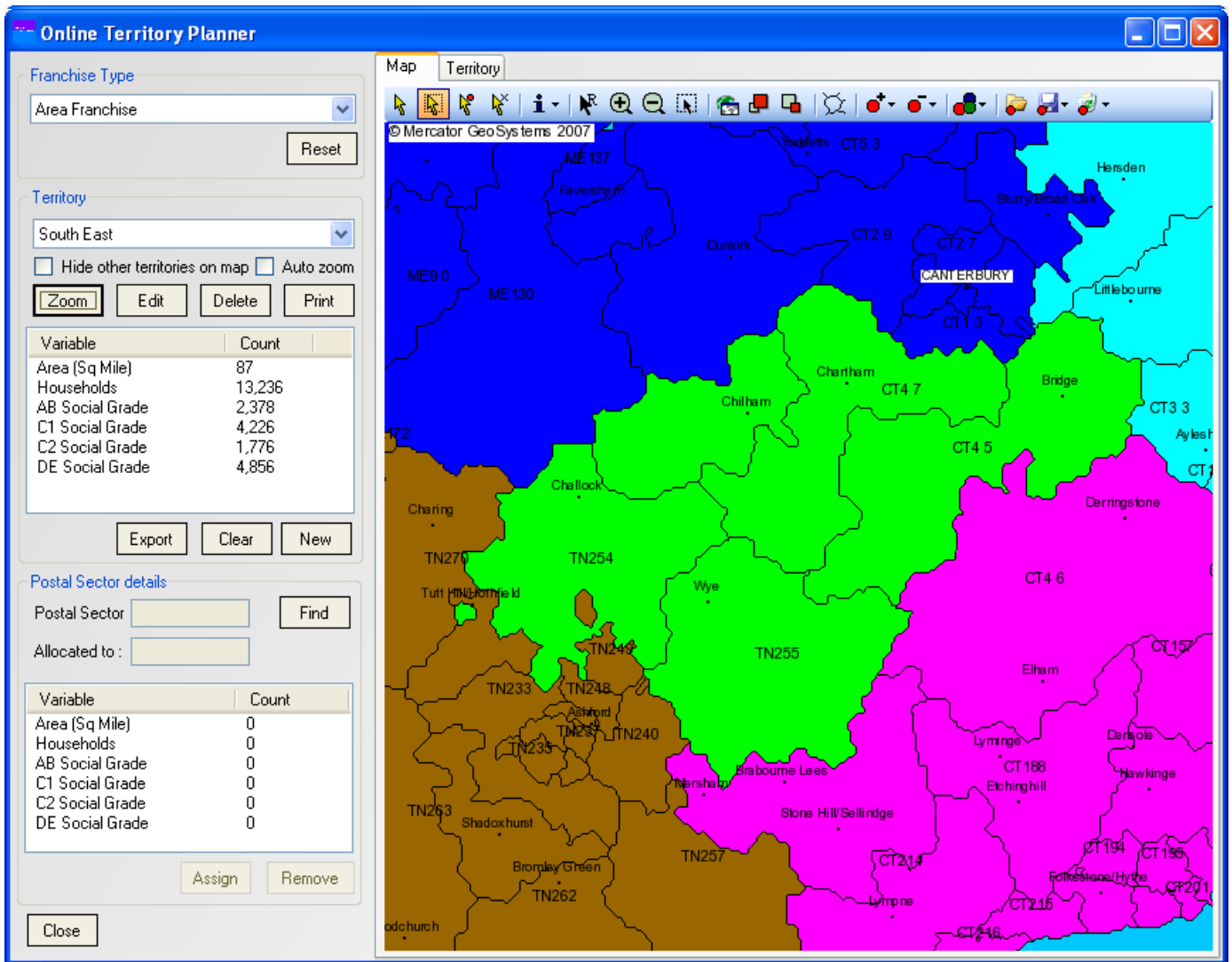


Illustration 30: Zooming to a specific territory, without hiding other territories

The 'Auto zoom' check-box will automatically re-zoom the map whenever the current territory is changed in the drop-down. Effectively this is akin to pressing the **Z**oom button for you.

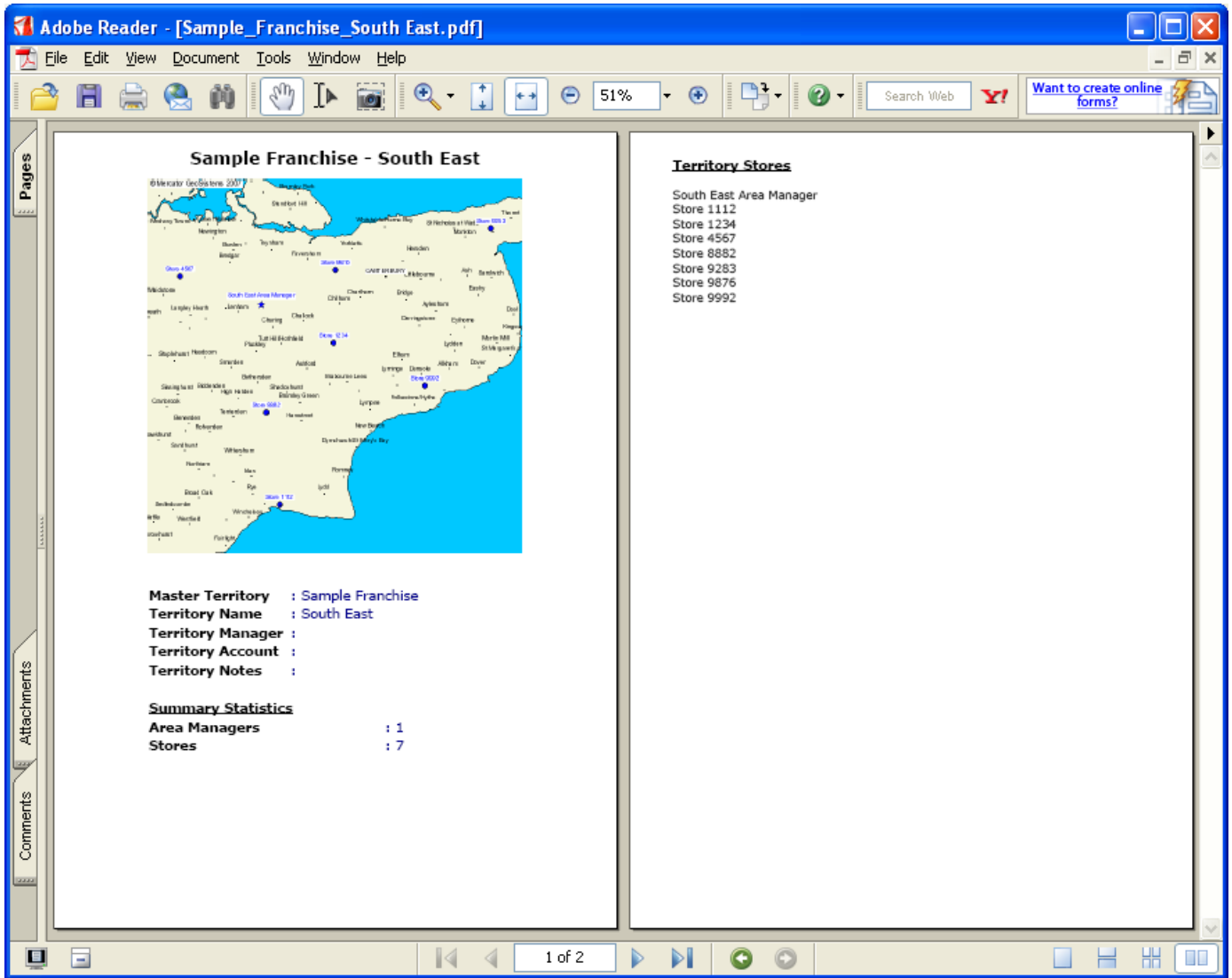


Illustration 32: Printing a territory to a PDF

When the PDF is open then the document can be saved externally, printed or emailed using the appropriate option on the 'File' menu.

ASSIGNING POINTS OR AREAS TO TERRITORIES

One of the principal tasks relating to territory management is the allocation and de-allocation of the units that make up the territory. In the case of this software that can be either 'areas' such as Postal Sectors, or 'points' such as stores or outlets.

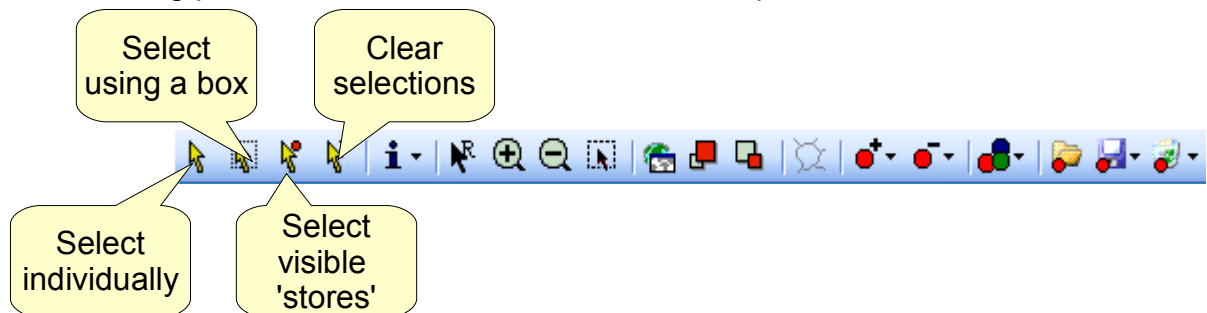
The steps above have outlined how to create territories, either manually or, in the case of point territories, by loading points from a file. This section will describe how to amend these territories.

Changing the areas or points that are allocated to a territory is a 3 step process :

- Firstly, select the territory that you wish to change in the drop-down list.
- The, using one of the 'Select' tools select the points that you wish to either remove from the selected territory, or assign to it.
- Then click the appropriate button, either **Assign** or **Remove**.

Selection tools

The tools for selecting points or areas can be found on the map tool bar.



Select individually allows you to select individual points or areas by clicking on them with the mouse. To add to your selection press and hold the **Ctrl** key whilst clicking the mouse.

Note : When working with points, you do not need to click exactly on the point, as the point nearest your click will be selected.

Select using a box lets you select all the areas or points within a box. This tool works the same way as the 'Zoom into a box' tool.

Select visible 'stores' automatically selects all visible 'stores' on the current map. This button is only enabled for 'point' territory planning systems.

Clear selections clears any current selections.

Selected points or areas will be shaded yellow to make them clearly visible. *Note that territories cannot be yellow.*

Re-assigning 'points'

So, for example, the work-flow to move 3 points from 'Territory A' to 'Territory B' is thus :

- Select 'Territory B' in the territory drop-down list with either the 'Auto zoom' enabled or zoom to it manually.
- Using the appropriate selection tool select the points you wish to re-assign.
- Now change the selected territory to 'Territory A', notice how the **Assign** button is now

enabled.

- Click on the **Assign** button to re-assign these points to 'Territory A'.

If the points are already assigned (as they are) you will see a warning about this :

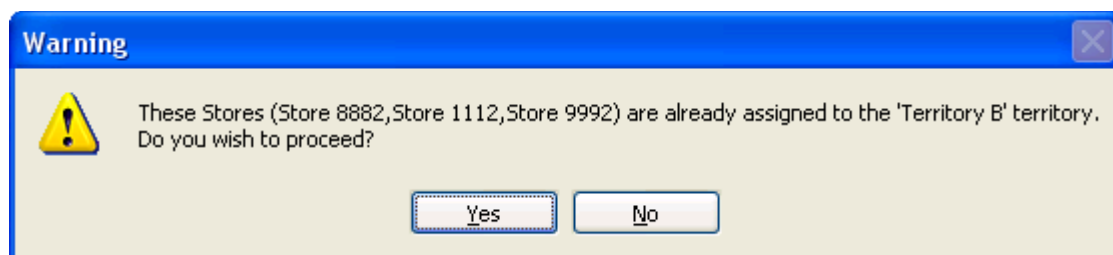


Illustration 33: Reassignment warning message

Clicking **Yes** will remove the points from 'Territory B' and assign them to the selected territory, in this case 'Territory A'.

Re-assigning 'areas'

Re-assigning areas is very similar except for one important difference – *areas can be assigned to multiple territories, whereas points can only be assigned to one territory*. This means that to 'move' points from one territory to another, as in the example above, you first need to 'Remove' them from the first territory. The complete work-flow is then :

- Select 'Territory B' in the territory drop-down list with either the 'Auto zoom' enabled or zoom to it manually.
- Using the appropriate selection tool select the areas you wish to re-assign.
- Click on the **Remove** button to remove them from Territory B. Your selections will remain.
- Now change the selected territory to 'Territory A', notice how the **Assign** button is now enabled.
- Click on the **Assign** button to re-assign these areas to 'Territory A'.

If you had not first removed the the areas from 'Territory B' you would see a warning about this :

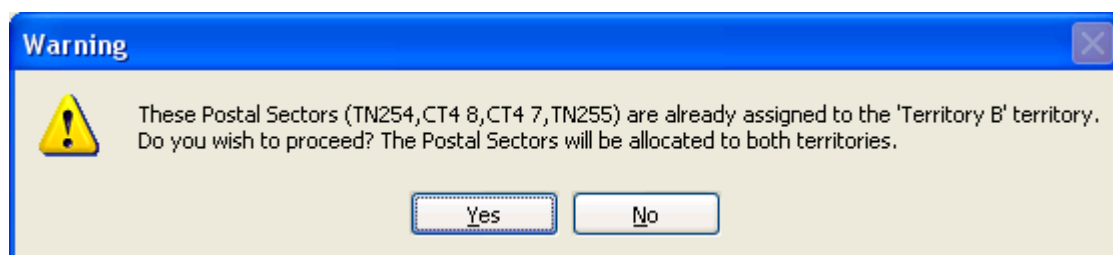


Illustration 34: Reassignment warning message

Clicking **Yes** would assign them to the selected territory, in this case 'Territory A' as well as having them assigned to 'Territory B'. This can be confusing, and is not recommended, but is sometimes a business requirement so is supported.

AUTOMATIC TERRITORY ASSIGNMENT

If you have the optional automatic territory assignment enabled then an additional button, 'Auto', will be present in the Territory section of the application :

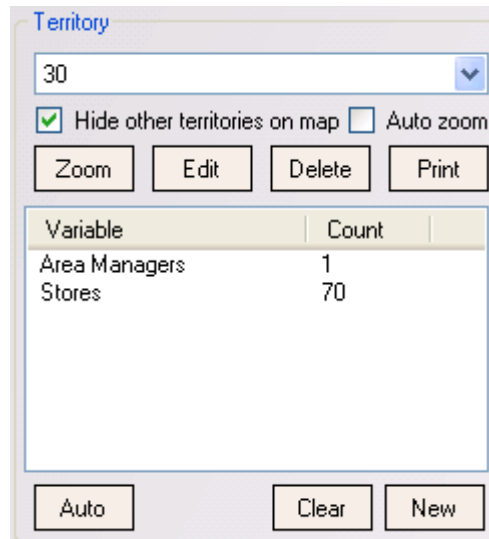


Illustration 35: The 'Auto' button

The automatic territory assignment function allows your territories to be defined automatically, based on driving time between the units of allocation (such as Postal Sector, store or customer) and some defined 'base' such as an Area Manager's or Head Office location. For each 'unit' the closest 'base' is found and the unit is assigned to it.

The behaviour of this function varies between the different planner types, 'point' or 'area', and as such will be explained in more detail below.

Automatic Planning of Point Based Territories

Broadly speaking the automatic planning of point based territories works in two modes; via a map selection or based on what is visible on the current map. The planner takes the 'allocation units' (such as store or pub) and allocates them to the nearest 'area manager'. If an 'area manager' is already allocated to a territory then the territory is modified according to the planner's results. If the area manager is a new point, or is otherwise un-allocated, then a new territory is created. *Note : if two 'area managers' supplied to the planner are part of the same territory then a territory will **not** be created for each manager – they will share the same territory.*

Planning of points using the map selection

Planning territories with a map selection enables you to exercise more control over what points are sent to the planner. This allows for a fine degree of control over what can potentially be changed by the planner. For example using the selection mode enables you to create a new location and see which area manager it should be assigned to.

Below is a series of screen shots that shows a typical sequence of steps involved using this method. This example begins with a number of locations ('stores') in the South East of England and one Area Manager and a territory which has all the stores and area manager assigned to it.

This example will show a new area manager being created and the planner being used to automatically re-assign points to the new area manager (and hence territory) where appropriate. Using the selection method allows us to exclude an individual store from re-assignment, for which there may be a good business reason.

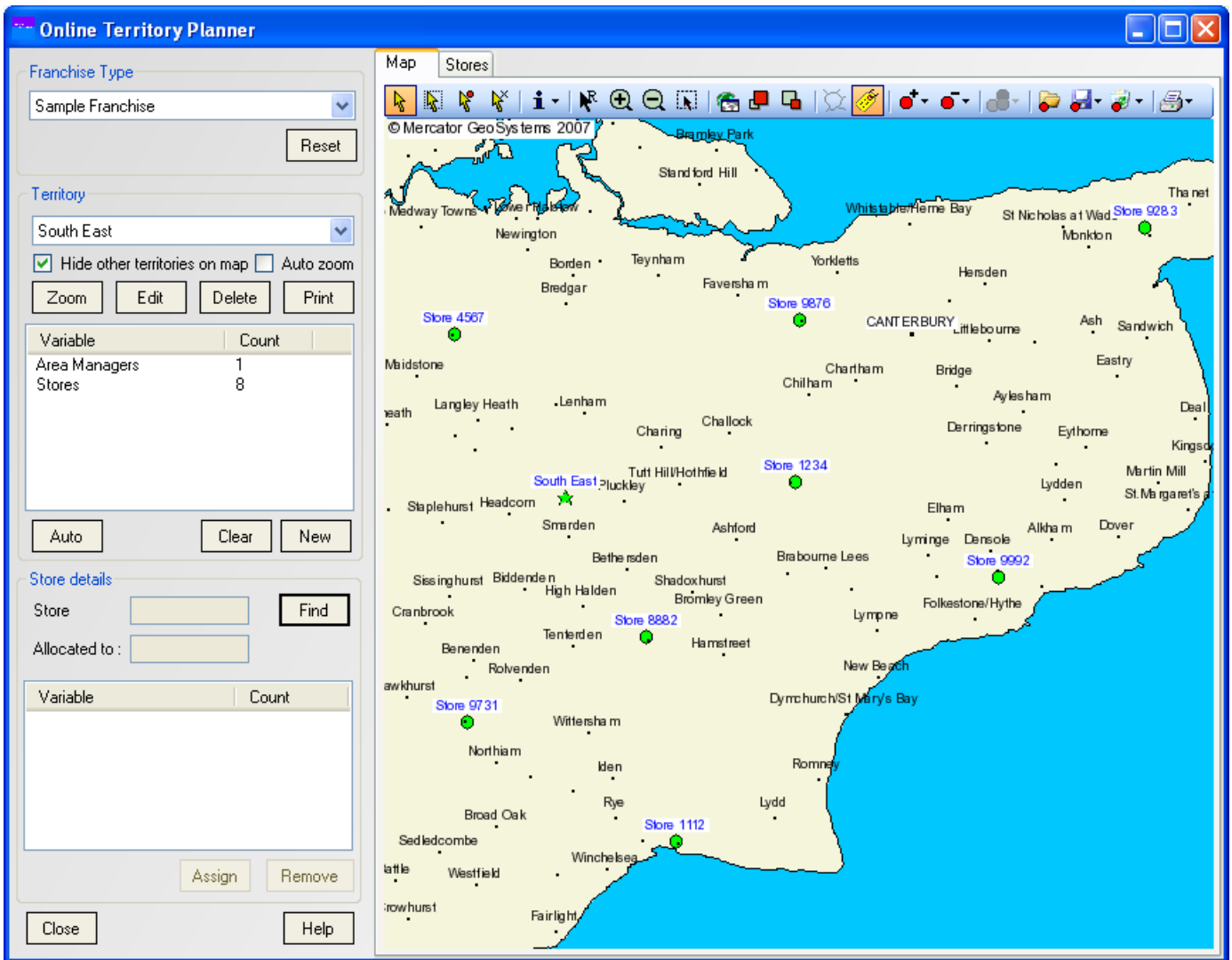


Illustration 36: The existing network of stores

Here we see the existing network of stores and the single 'South East' area manager and territory.

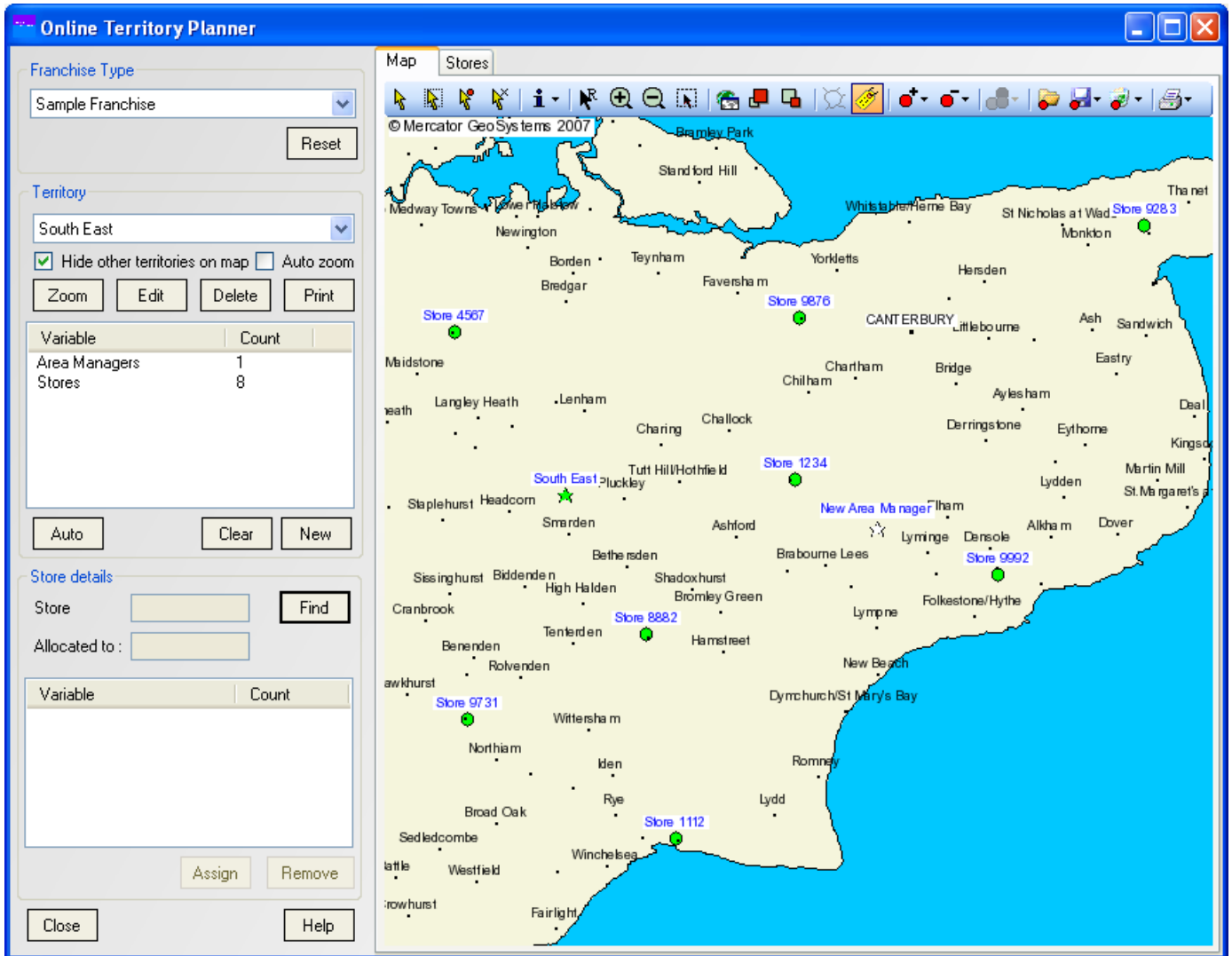


Illustration 37: The new Area Manager added to the map

The map now shows the new Area Manager to the right of the centre of the map. Now we can select the points we wish to have the planner work with.

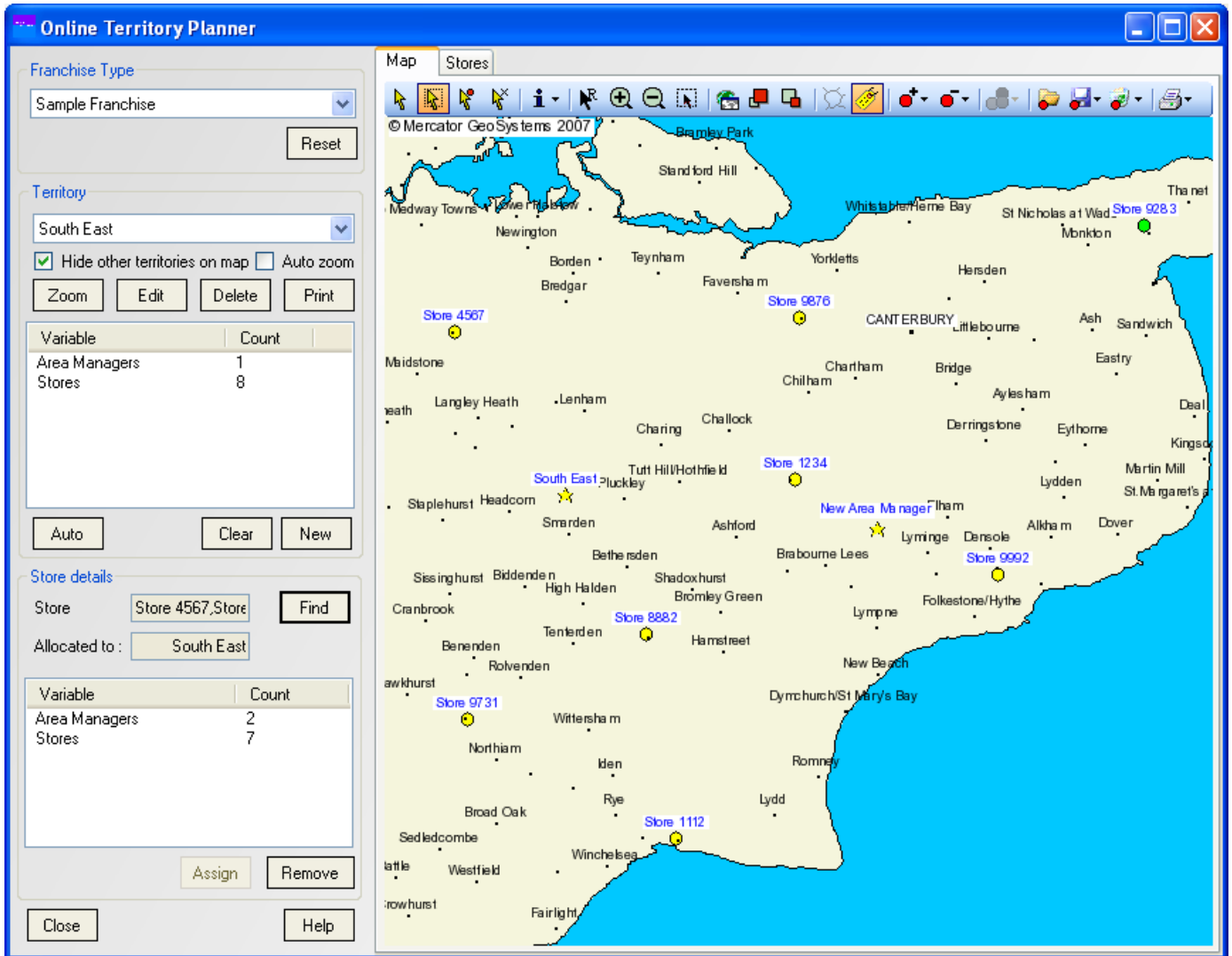


Illustration 38: Map of selected points

Now we have selected the points we wish to include. Note that the point in the top right of the map has *not* been selected. We wish to leave this point assigned to the South East area manager and hence exclude it from the planner.

Now press the **Auto** button to plan the new territories. After a delay, the length of which depends on the number of points being planned, a new map will be drawn and the updated territories available for review.

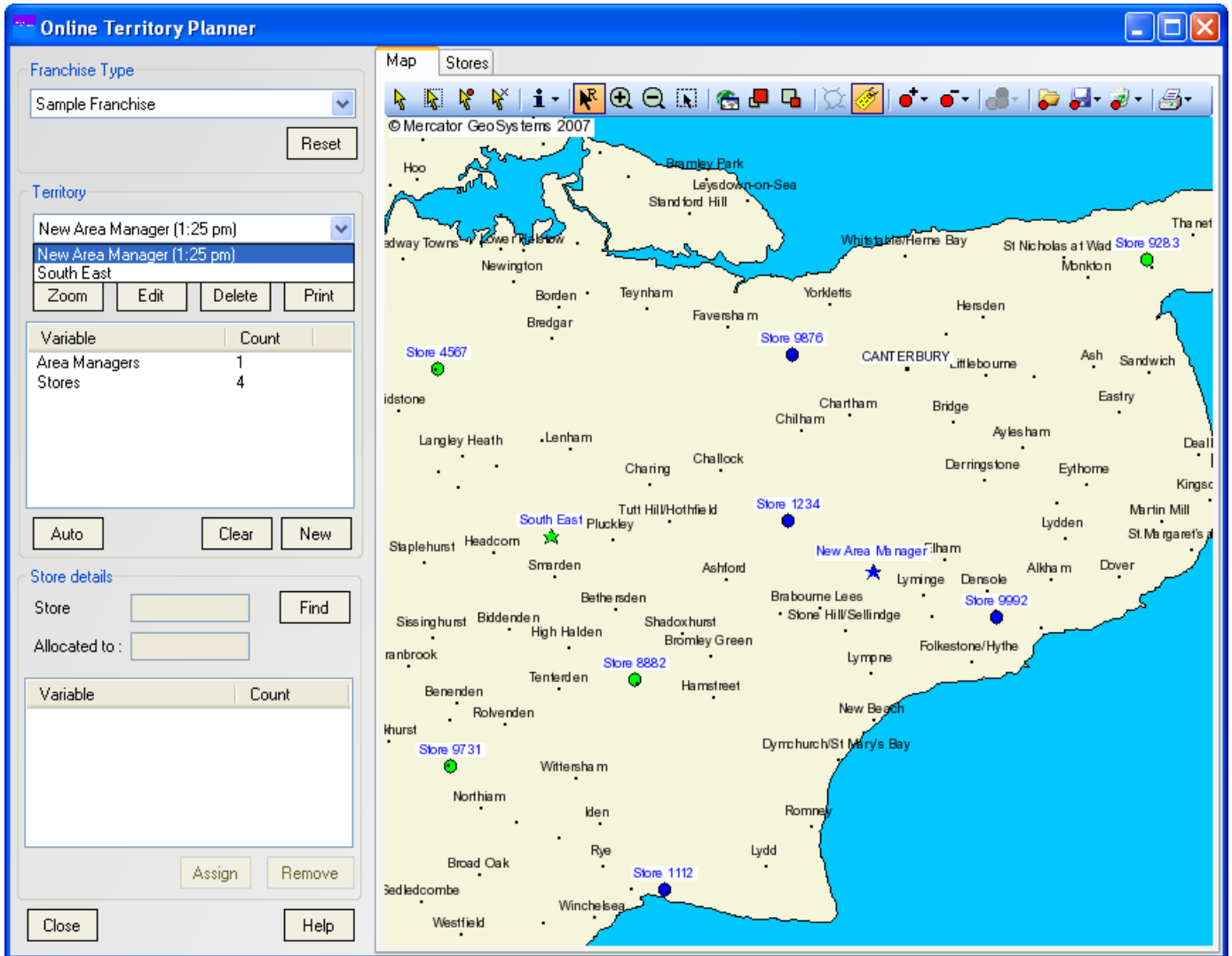



Illustration 39: New, automatically created, territory map

Here we can clearly see the new territory on the map and in the territory list.

A new territory has been created with the name, 'New Area Manager – 1:25 pm'. This is based on the name of the area manager and the time at which the planner was ran. This enables you to identify automatically created territories quickly and easily.

Note that the point that was excluded from the planner in the top-right of the map is still allocated to the 'South East' territory.

Planning of points using the current map

Planning territories via the current visible map allows you to plan many more points. This method is more useful when planning points over the entire country, or for densely packed points. To plan territories using this method simply ensure that no points are selected. You can click on the 'Clear Selections'  tool button to remove any selections.

Using the example from above, when you press the **Auto** button you will first be prompted that the planner may take a while to run with no selection, although this is typically only a concern when there are many hundreds, or even thousands, of points. Even then the planner will only typically take a few minutes.

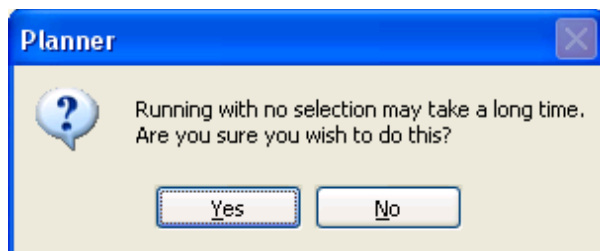


Illustration 40: Planner warning message

Saying 'Yes' will allow the planner to continue, with the result that all visible points are assigned to their nearest Area Manager (now including the point that was previously excluded) :

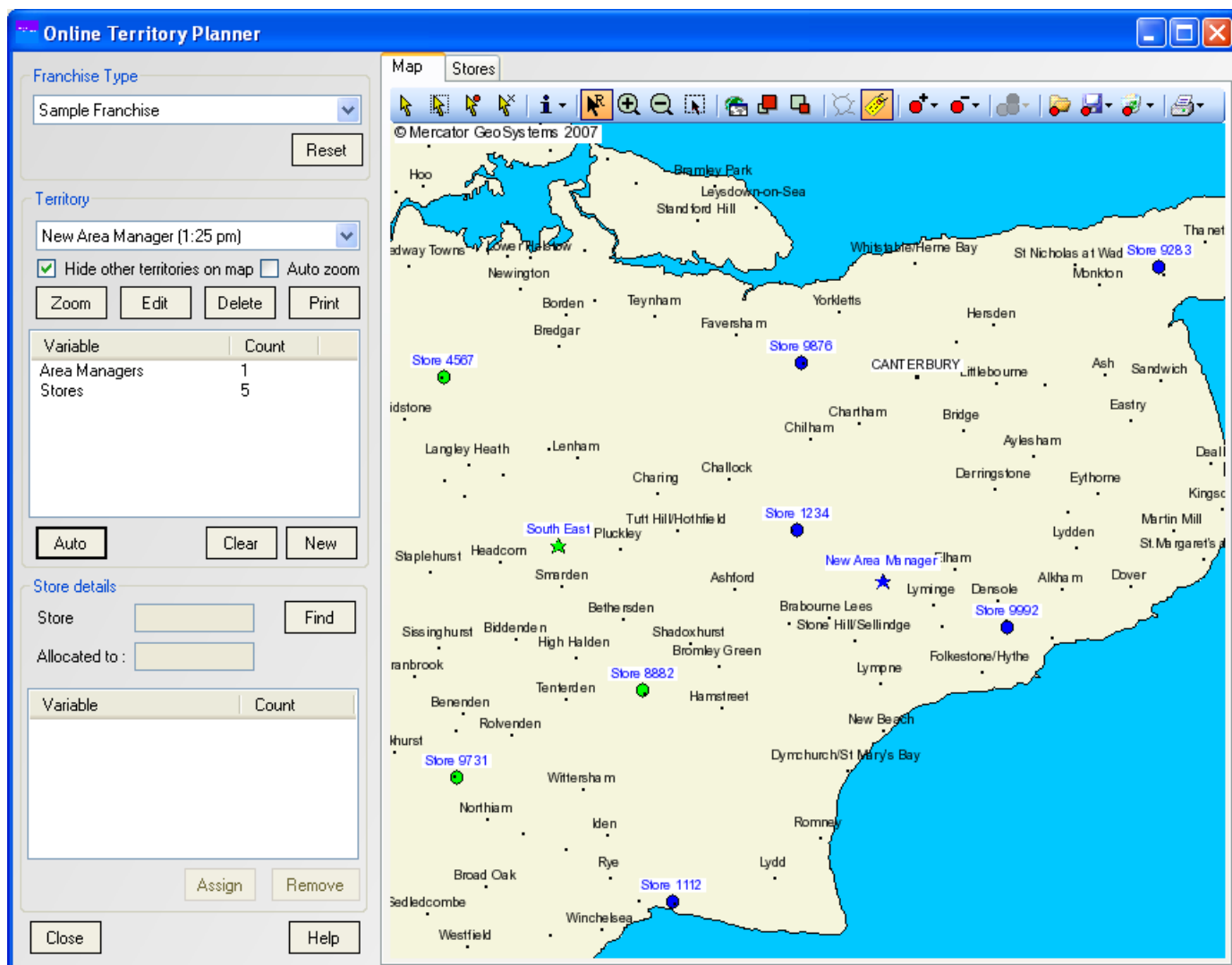


Illustration 41: Results from running the planner with no selection

Automatic Planning of Area Based Territories

Planning areas is similar to planning points in that you can work with a selection or with the entire map. The principle is the same in that using a selection allows you to restrict the areas and 'managers' that are considered for assignment. Remember that for area-based systems, such as those based on Postal Sectors, if you plan large areas with no selection you will potentially be including thousands of areas which may take time to plan.

A key concept with 'area' based systems is that you *must* create points that represent 'Area Managers'. This is not a requirement for manually created territories as you control the allocation, but in order for the automatic planner to work it has to have a series of locations which can be compared against when choosing how to allocate the Postal Sectors.

With these requirements understood the planner is easy to use and understand.

For example consider this situation with three Area Managers in the South East of England.

The screenshot shows the 'Online Territory Planner' interface. The main map displays the South East of England, divided into numerous Postal Sectors (PS) and territories. Three Area Managers are marked on the map: John Briggs (red dot), Lave Powell (blue dot), and Simon Troper (red dot). The territories are color-coded: green for the western part, orange for the eastern part, and cyan for the southern part. The interface includes a left-hand panel with controls for Franchise Type (Area Franchise), Territory (Dave Powell), and Postal Sector details. The Territory panel shows a table of variables and counts for the selected territory.

Variable	Count
Outlets	1
Area (Sq Mile)	322
Households	146,996
AB Social Grade	28,691
C1 Social Grade	44,104
C2 Social Grade	19,441
DE Social Grade	54,741

Variable	Count
Area (Sq Mile)	0
Households	0
AB Social Grade	0
C1 Social Grade	0
C2 Social Grade	0
DE Social Grade	0

Illustration 42: The existing Postal Sector based territories

In this case we wish to automatically plan the entire area, so with no selection we simply click on the **Plan** button.

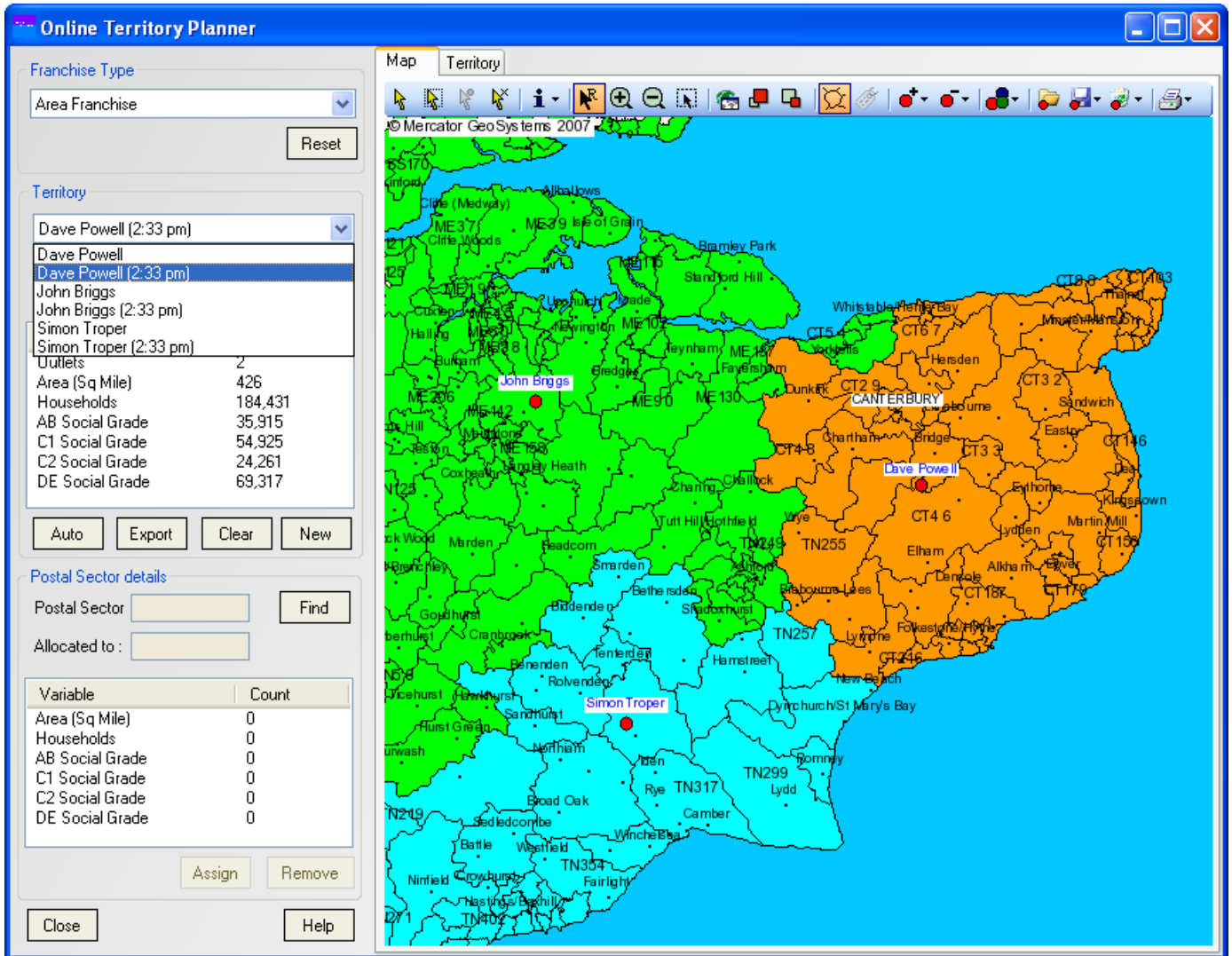


Illustration 43: New, automatically planned territories

After the planner finishes the new territories are displayed. As with the point-based planner above new territories are created with a name based on the area manager and the time the planner is executed.

APPENDIX A – CONTACT DETAILS

Help desk

If you experience any issues with either the software, or this documentation, please contact us on this email address :

helpdesk@mercatorgeosystems.co.uk.

Or on this telephone number :

UK : (0114) 235 3409

Or using Skype to this Skype name :

mercatorgeosystems

Or via the web :

<http://www.mercatorgeosystems.com/contactus>

Bugs

If you are sure you have found a bug, or wish to see if a problem has already been raised and want to inspect it's status please register with us here :

<http://bugs.mercatorgeosystems.co.uk/>

Documentation

The most up to date version of this document will always be located here :

<http://www.mercatorgeosystems.co.uk/mgOnlineTerritoryPlanner/docs/User Guide.pdf>