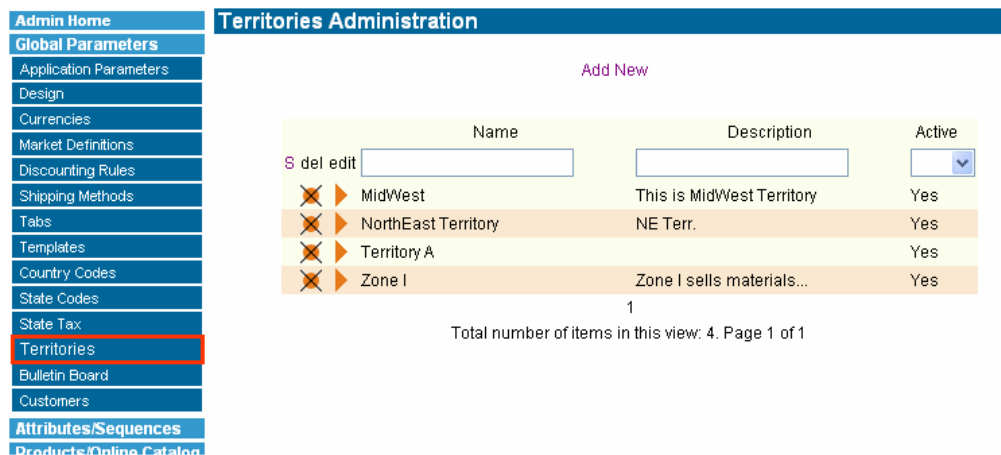


## TERRITORIES

Territories can be defined if the business is organized by areas. There can be several dealer groups divided by territories. All Web Site Users from the same area can be assigned to the same territory defined here.

Selecting the **Territories** link under the **Global Parameters** drop down will bring up the **Territories Administration** screen shown in Figure 37-1.



Name	Description	Active
MidWest	This is MidWest Territory	Yes
NorthEast Territory	NE Terr.	Yes
Territory A		Yes
Zone I	Zone I sells materials...	Yes

Total number of items in this view: 4. Page 1 of 1

Figure 37-1 - Territories Administration

This screen shows a list of territories already defined. Just above the list is the Search bar. When one or more characters are entered into one or more fields, click on the **S** link to the left. The list will show matching territories only. Clicking the **Edit** triangular bullet next to the Territory displays the screen shown in Figure 37-2 to edit the Territory. Clicking on the **Delete** crossed round bullet deletes that territory

Clicking **Add New** opens the Territory Administration page, containing **Name** and **Description** input fields, **Active** check box, and **Save** button, as shown in Figure 37-2:



**Territories Administration**

**Name :**

**Description :**

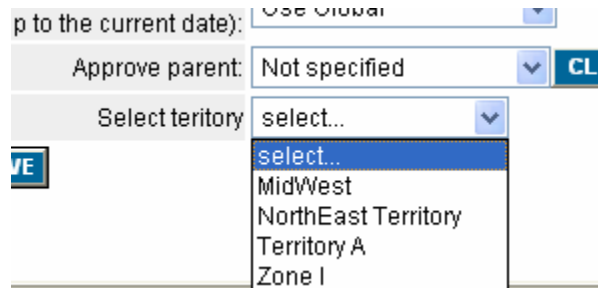
**Active :**

**SAVE**

■ = required field

Figure 37-2 - Territories Administration page

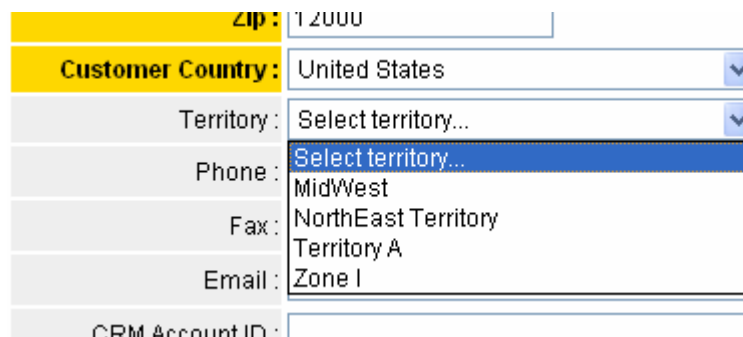
Once Territories are created, they can be assigned to users as shown in Figure 37-3. Assigning users Territories creates logical divisions of users and can be very useful.



The screenshot shows a form with several fields. The 'Select territory' field is open, displaying a dropdown menu with the following options: 'select...', 'MidWest', 'NorthEast Territory', 'Territory A', and 'Zone I'. Other visible fields include 'Approve parent' set to 'Not specified' and 'Use Global' set to 'Use Global'.

Figure 37-3 – Assigning Territories to Users

Territories can also be assigned to customers, as shown in Figure 37-4. Creating logical groupings of customers can also be used in many ways, such as assigning all Web Site users to a specific territory.



The screenshot shows a customer form with fields for 'Zip' (12000), 'Customer Country' (United States), 'Territory' (Select territory...), 'Phone' (Select territory...), 'Fax' (NorthEast Territory), and 'Email' (Zone I). The 'Territory' and 'Phone' dropdown menus are open, showing the same options as in Figure 37-3: 'Select territory...', 'MidWest', 'NorthEast Territory', 'Territory A', and 'Zone I'.

Figure 37-4 – Assigning Territories to Customers

Territories are useful in many ways. They can be used anywhere a Tag can be used, such as in Cart/Quote Visibility (Chapter 40) and in Discounting Rules (Chapter 26). Tags such as `<*CO_INFO(TERRITORY_NAME)*>`, `<*BT_INFO(TERRITORY_NAME)*>`, and `<*SAMETERRITORY*>` allow the retrieval of the cart owner's territory name, the customer's bill to territory name, and the comparison of the cart owner's territory and the currently logged in user's territory, respectively. These Tags can be used in many useful and powerful ways to logically separate users and customers.

**NOTE:** A complete list of Tags is available in Appendix A.