OCE Optimizer March 2023

Optimizer

User Guide

For internal and external use

Document Version: 1.0

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Welcome to Optimizer

IQVIA Orchestrated Commercial Engagement (OCE) Optimizer empowers life sciences companies to take full advantage of their commercial resources and channels by planning individualized and orchestrated customer interactions through responsive alignments, intuitive segmentations, and agile engagement plans.

OCE Optimizer is engineered to address the complexity of planning and adjusting engagements with multiple customer stakeholders through personal and digital channels.

Publication Record

Application Version	Document Version	Publication Date	Author	Approver	Overview
March 2023	1.0	March 2, 2023	L. Halttunen	N. Hegde	See section below

What's New?

The following updates have been made to this guide for the March 2023 release.

Topic	Feature Summary
View Dashboard	HO user can view the number of accounts aligned and unaligned by country using the Daily Account Process graph.
Modify a Product End Date a Product Delete a Product	Users can cascade modified end dates to child records of products and deleted products.
Modify a Product	Users can cascade the product update Effective Date action and edit to update the Effective Date when initiated on a screen, by a csv upload, or by API.
Move a Child Territory from One Parent to Another	User can move a child territory from one parent to another using a new **Move** step in the **Territory Hierarchies** section or by using a csv.

Topic	Feature Summary
Import Product Data Using CSV Files	User can cascade Product operations by adding a virtual **Cascade** column to the Product csv file.
Accounts Details Tab	**Audit Information** section added to **Accounts Details** tab.
	Created By and **Last Modified By** columns added to **Account Account Address** grid.
Accounts Affiliations Tab	**Created By** and **Last Modified By** tabs added to tabs.
	Created By and **Last Modified By** columns added to **Accounts Affiliations** tab in Affiliations-Up and Affiliations-Down grids.
Accounts Ratings Tab	**Ratings** tab added for Accounts.
Scenario Details Tab	If a scenario has related OMScenarioProducts records, a **Product** row appears in the **Overview** section under **Products**.
Add a Product Alignment Transaction to a Scenario	If the scenario has related OMScenarioProducts records, an additional grid appears in the **Product** tab
Create a New Adjudication	Only one active adjudication of type *Current* is allowed.
Territory Map View	An HO user can override the default color selection for territory shapes.
Add a User Assignment to a Scenario	An HO user can add transactions to a scenario starting with either territories or users.
Add a Territory Transaction to a Scenario	**Move** action added to **Territory Hierarchies** section.
View Scenario Results	There is a Looker version of the Impact Analysis Report and Engagement Plan Impact Analysis Report under the **Results** tab in Scenario.
Looker Access	Three levels of Looker access.

Topic	Feature Summary
Looker Edit	A user with User Explore access has a user-friendly and meaningful set of fields available for the Territory Roster Report.
Product Details Tab	**IsPending** field added to **Child Products** section.
View Product Information	**IsPending** field added to Products page.

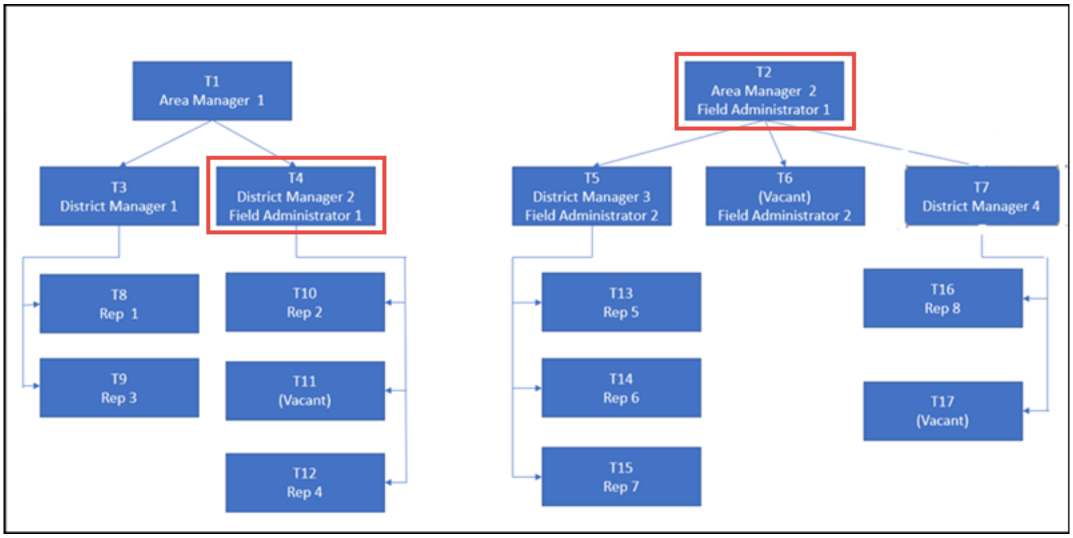
Note: For more information on enhancements to this release, access the OCE Optimizer March 2023 (R15) Release Notes.

Users of OCE Optimizer

- **Global Home Office users** are not assigned to any territory. They have access to all the entities and functions for the entire organization and all regions within the organization. Home Office users perform day-to-day sales operations tasks such as employee roster maintenance, product roster maintenance, explicit and exclusion management, and territory planning and territory management tasks, such as account alignment rule setup and simulation. They have access to operational and analytical reports and administrative tools to ensure system and rules are performing as expected.
- **Regional Home Office users** have a similar function to Home Office users except they are assigned to a specific region within the organization and have access only to the assigned region and all regions below it in the hierarchy.
- **Field Administrator users** are assigned to territories within the field sales hierarchy structure. They perform administrative tasks such as user assignment and explicit and exclusion management on behalf of field managers. Field Administrator users have access only to users, products, geographies, and accounts directly aligned to their territories and all territories in the hierarchy below. A Field Administrator may be assigned to more than one territory, and these assignments could be for different sales forces and the assignments could be at different levels in the hierarchy structure. Field Administrator users have access to past and current data for territories directly aligned and for underlying territories in their sphere of influence if any part of the underlying entity's effective date falls within the Field Administrator's assignment. If there is an overlap within the Field Administrator's assignment, the Field Administrator has access to the record. Field Administrator users have access to future data if permission to manage future data

is granted. Field Administrators cannot perform functions that affect the entire sales force or impact any territory beyond their sphere of influence, meaning account alignment rules and similar functionality are not available for them.

In the diagram below, the same person is performing both Field Administrator tasks and Manager tasks.



- **Sales Representatives** have access to the adjudication module to review and provide feedback for current or future alignment cycles.
- **District Manager users** have access to the adjudication module to review and provide feedback and approve or reject rep input for current or future alignment cycles.
- **Operations Administrator users** monitor the environment, check error logs, assign existing permissions and roles to users, archive data, and purge data.
- **System Administrator users** manage functionality, enable/disable, create/edit report templates, and manage (add/edit) permissions and roles.

Getting Started

When you start using the app, you 'll need to know how to perform some basic functions.

See:

- Log In
- Forgot Your Password?
- Change Your Password
- Change the Language and Time Zone
- Log Out

Log In

Logging in requires a username, a password, and authorization to run the application.

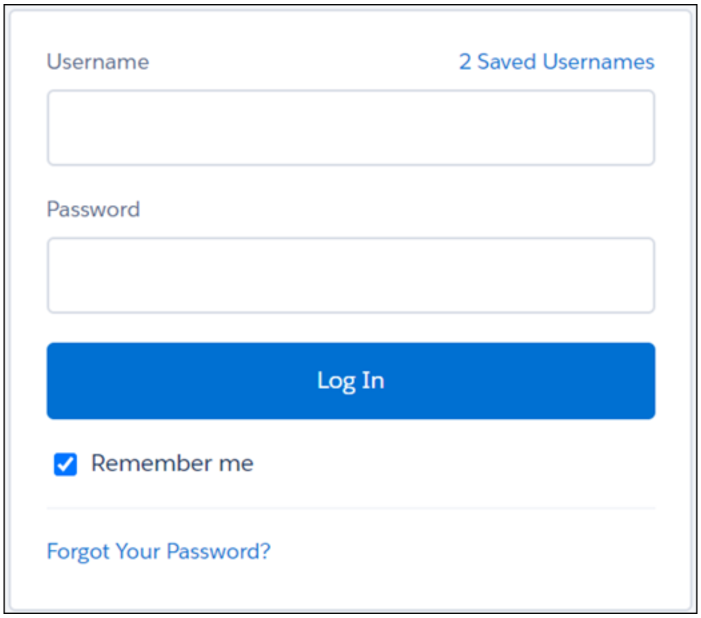
The first time you log in to the application, you may be prompted to set your password, and the Password page opens automatically. See Change Your Password to set or change your password.

To log in to the application

1. Access the OCE Optimizer login page as determined by your company. For example, you may access the application via your company’s Intranet or using a shortcut within your Web browser’s Favorites feature.

2. Enter your username and password, then click **Log In**.

> **Note:** Select **Remember Me** to have the system automatically enter the username of the last person who logged on using the computer.



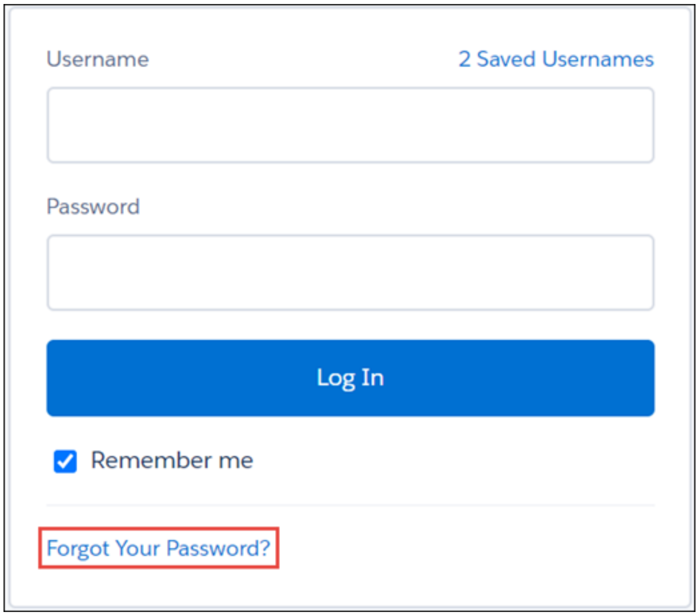
After you have logged on successfully, the Home page displays.

Forgot Your Password?

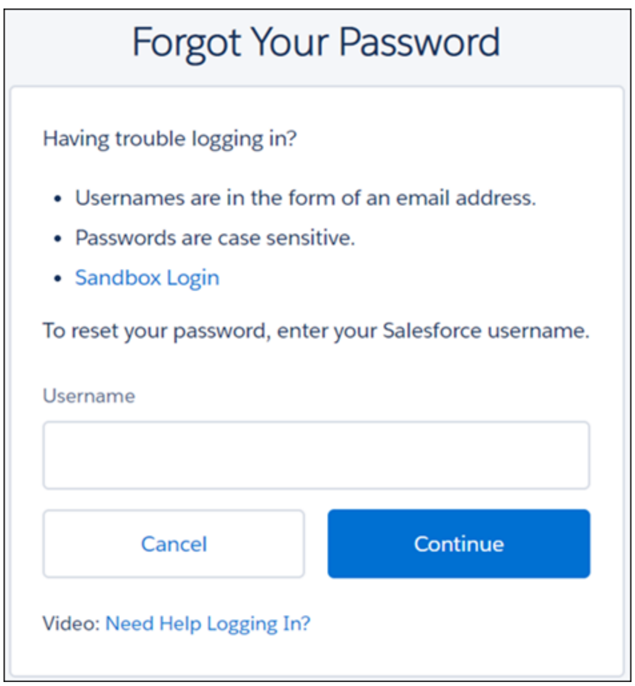
If you set up security questions and answers in Salesforce.com, you can reset your password if you forgot it.

To reset your password

1. On the Log In screen, click **Forgot Your Password?**.



2. Enter your **Username** and click **Continue**. An email message with a link to change your password is sent to your email account.



3. Open the email message and click the link in it.

4. Answer the security question and click **Continue**.

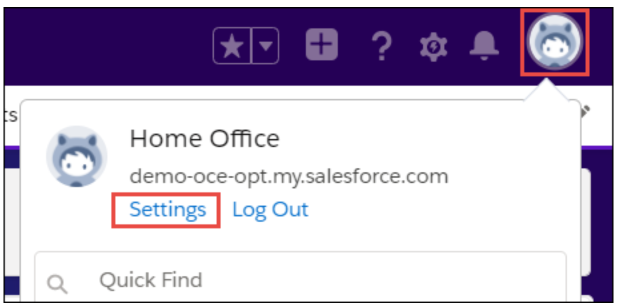
5. Reset your password.

Change Your Password

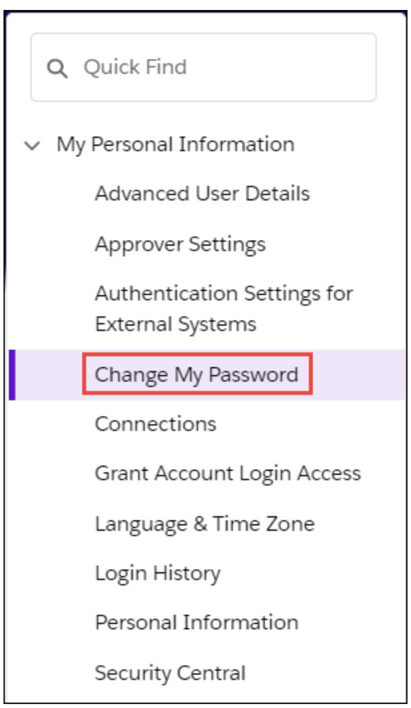
You can change your password, and the new password will be in effect the next time you log on. In addition, your password will expire after a specified number of days (as determined by your company), and you will be forced to change it.

To change your password

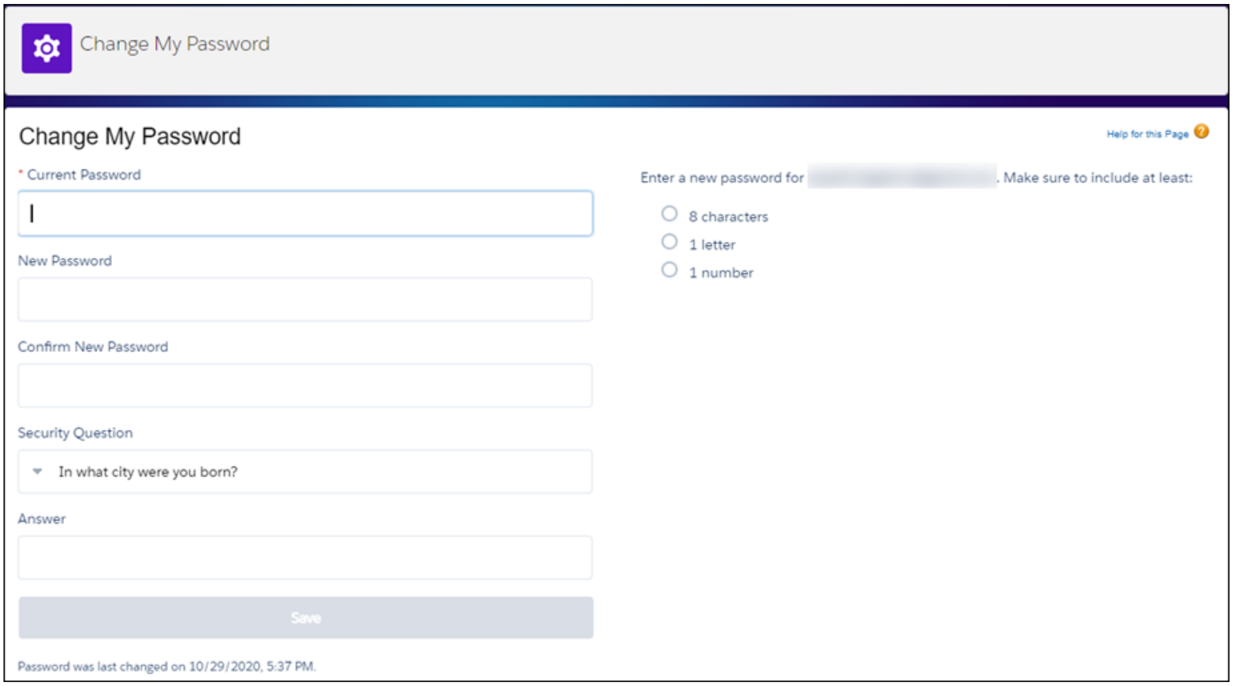
1. Click **Profile**  at the top right of the screen and select **Settings**.



2. From the menu on the left, click **Change My Password**.



3. On the Change My Password page, enter the following information and then click **Save**.



- **Current Password**: Enter your current password.
- **New Password**: Enter a new password. The password is case sensitive, must be at least 8 characters, and must include 1 number and 1 letter.
- **Confirm New Password**: Re-enter the new password.
- **Security Question**: Select a security question from the drop-down.
- **Answer**: Enter the answer to the security question.

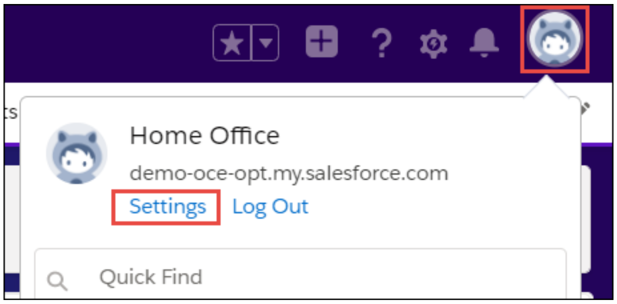
The next time you log on, your new password will be in effect.

Change the Language and Time Zone

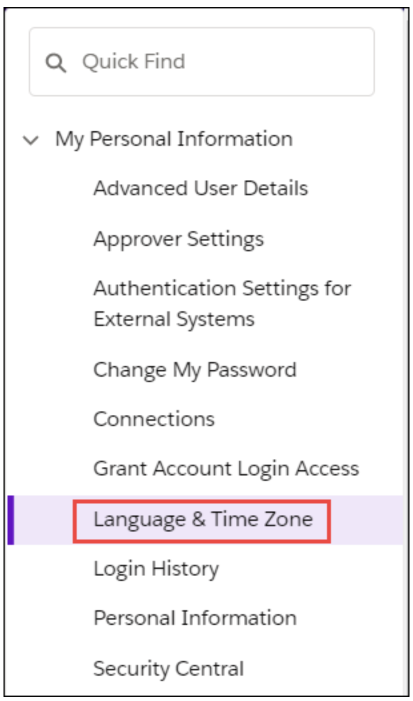
You can change your language preferences and time zone.

To change your language and time zone setting

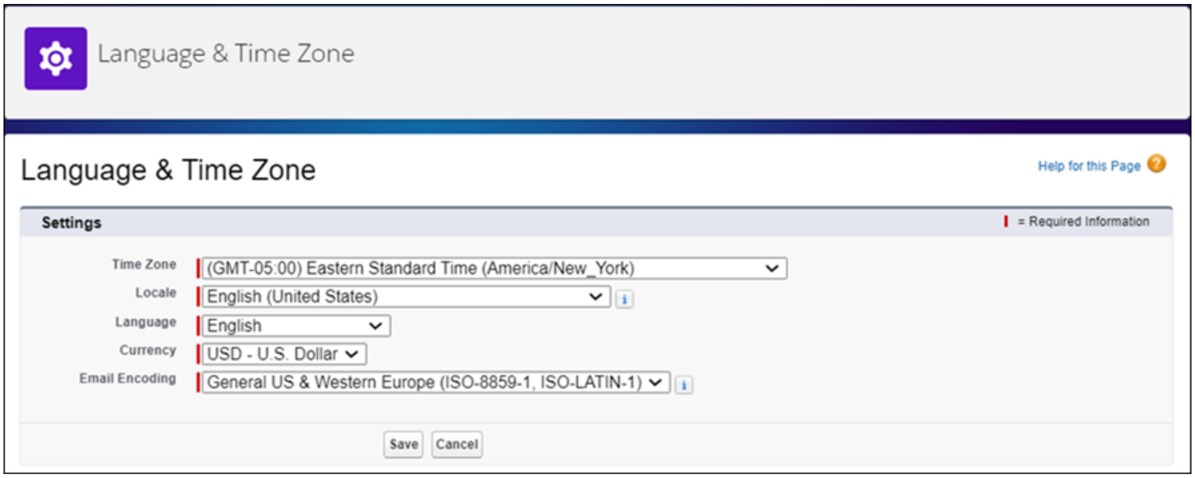
1. Click **Profile**  at the top right of the screen and select **Settings**.



2. From the menu on the left, click **Language & Time Zone**.



3. Enter your settings and click **Save**.

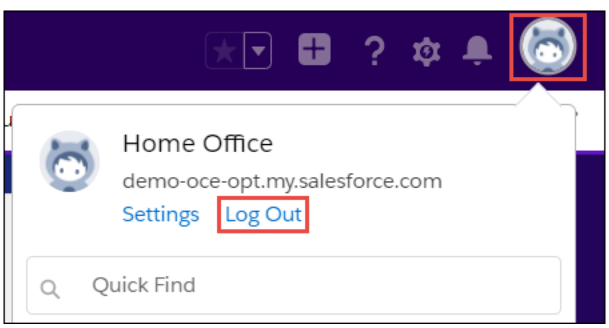


Log Out

You should always log off OCE Optimizer when you are not actively using it and before shutting down your computer.

To log out of the application

1. Click **Profile** at the top right of the screen.
2. Click **Log Out**.



Application Screens, Rules, Fields, and Functions

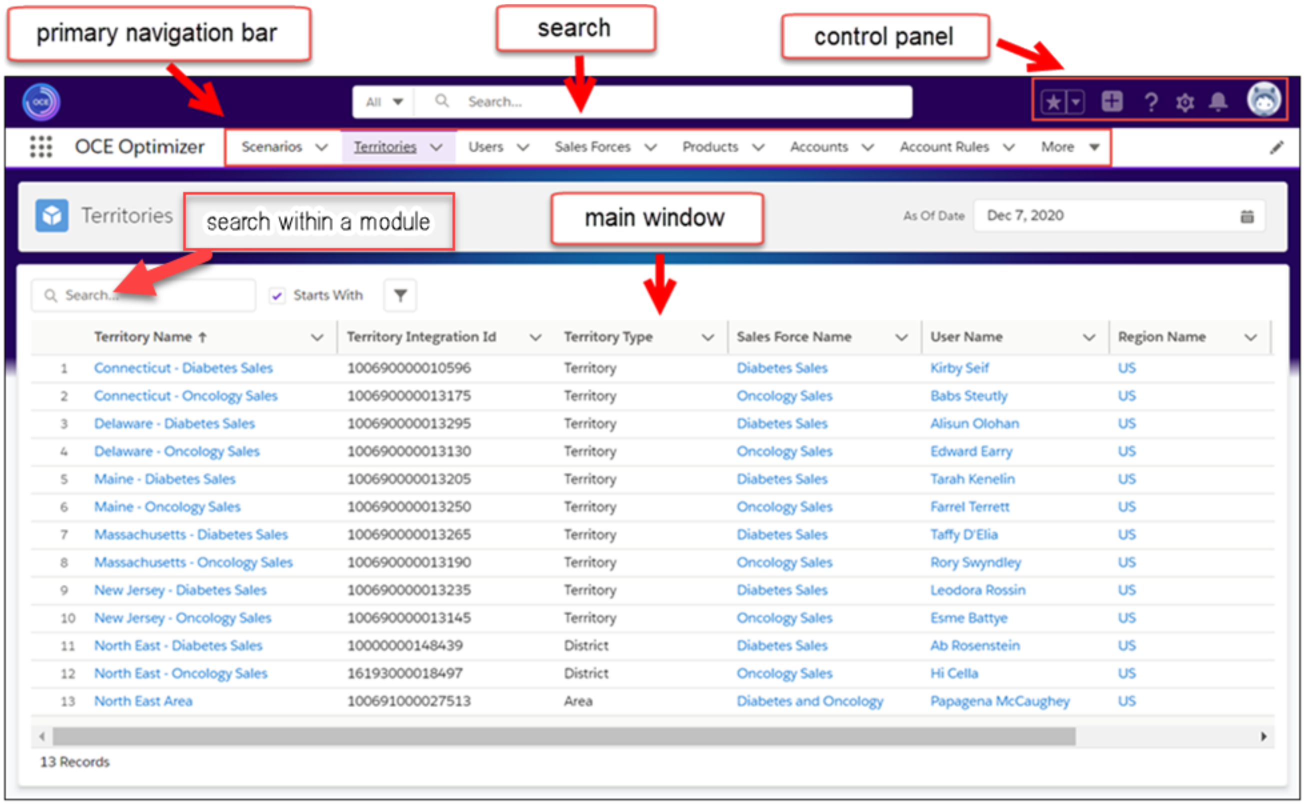
See:

- Application Screens
- Data Entry Fields and Common Functions
- As Of Date
- Date Management Rules
- Search and Filter Functions
- Page Notifications

Application Screens

The application screens consist of:

- **Primary navigation bar**: Navigates you through the application.
- **Search**: Enter a search string to search across all modules.
- **Control panel**: Provides access to the application administration.
- **Main window**: Displays content.



Click a tab on the primary navigation bar at the top of the screen to access a main function (module).

- **Scenarios**: Provides access to the managing scenarios functionality.

Use the control panel to manage shortcuts to your favorite functions, get online help and search for documentation, view notifications that require your attention, access your profile to change your settings, switch to a different Salesforce view, or log out.

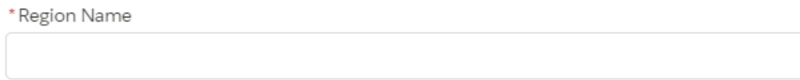
Data Entry Fields and Common Functions

Throughout the app, different types of fields are used to enter information, and some fields are required to save an entry. Required fields have a red asterisk; if you try to save without completing a required field, an error message appears.

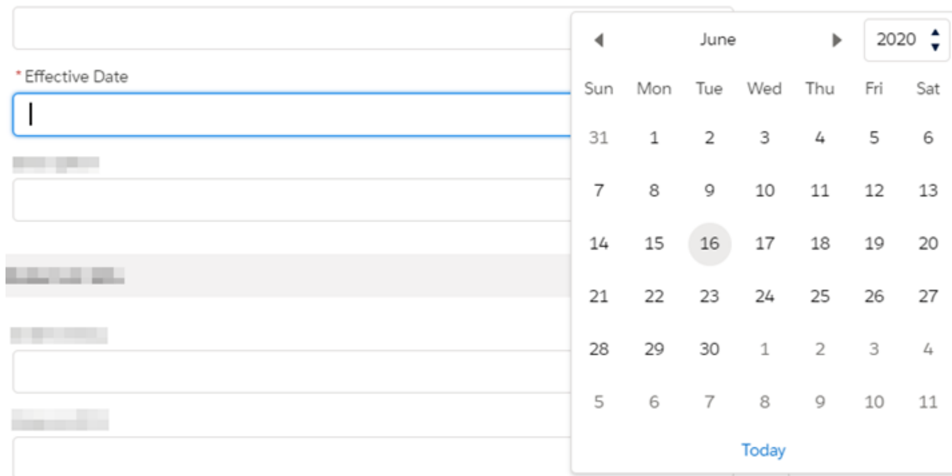
The application also contains common functions available in each module to aid in viewing information on the screen.

Some common types of data entry fields are:

- **Text**: Click the field and type in it.

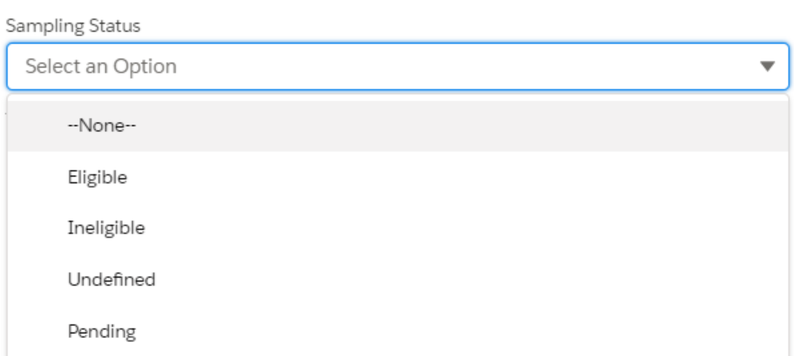


- **Date**: Click the field and then select a date.

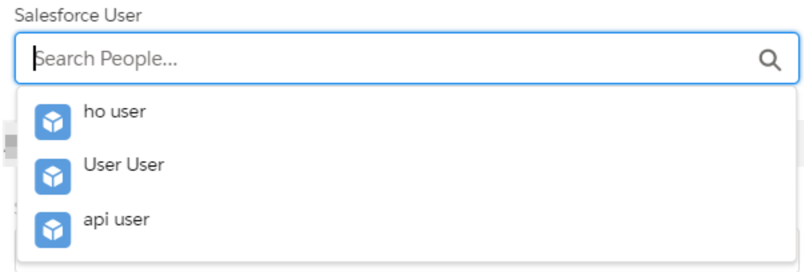


Tip: To select the current date, click **Today**.

- **Pick-List**: Click the field and then select a value.

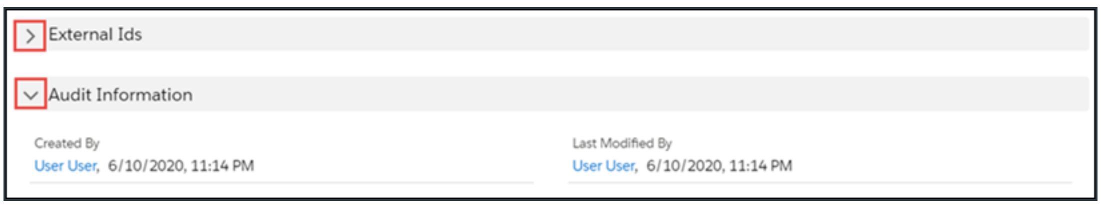


If **Search** is available in a pick-list field, type in it to filter the list of values.

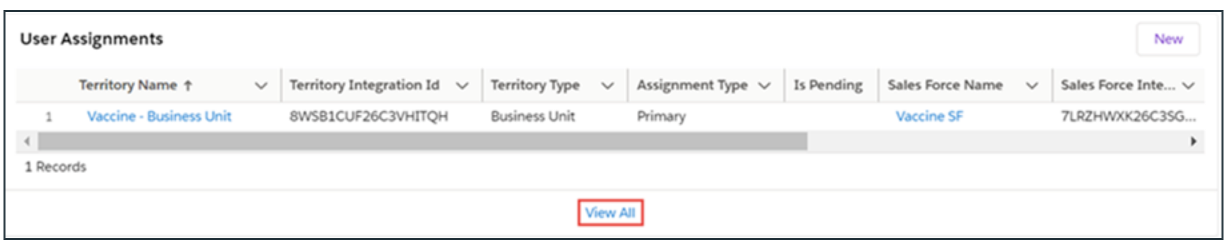


Some common types of application functions are:

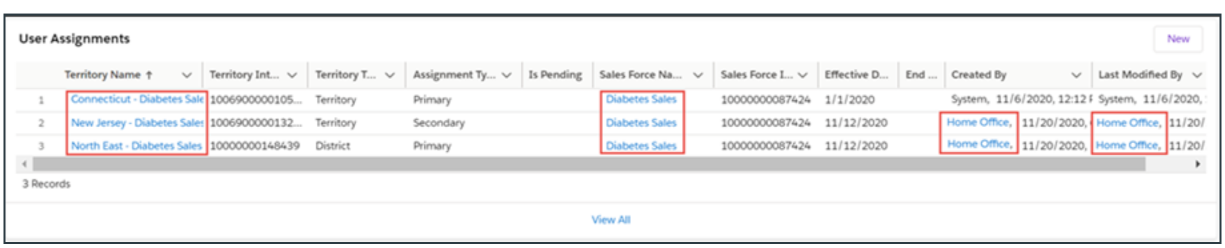
- **Expand** > and **Collapse** ⌄: Click **Expand** > before the name of a section to display the contents and **Collapse** ⌄ to hide the content.



- **View All**: Click **View All** to view all available records.



- **Previous**: Click **Previous** to go to the prior screen.
- **Links**: Click a link to go to that page and view details.



As Of Date

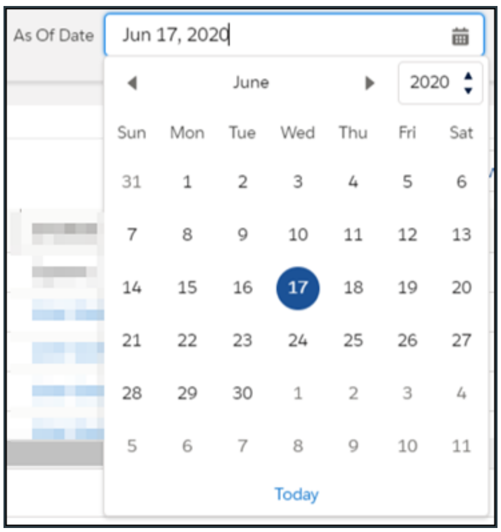
Use the As Of Date function at the top right of the screen to view data in the application as of a certain date. When you change this date to a date in the future or in the past, the application displays all data as it will be or as it was on that date. You can change it to a future date, for example, to view the way your organization will look if you make certain organizational changes.

Important: Be sure to set this date properly before you view system data. If application data does not display as you expect it to, check the current **As Of Date**.

If you access the main page for an entity and the entity did not exist on the **As Of Date** that has been set, an error message displays.

To change the as of date

1. Click the **As Of Date** to open the calendar. By default, the date is set to the current date.



2. Enter a date or select one (see [Data Entry Fields and Common Functions](#)). To set the **As Of Date** to the current date, click **Today**.

   The data throughout the application immediately reflects the date you set.

Date Management Rules

The following date management rules apply to all entities unless stated otherwise.

- The End Date cannot be earlier than the Effective Date.
- Sub-entity dates must be between the effective and end dates of the main entity. For example, a user assignment transaction cannot have an effective date earlier than the effective date of the user or territory entities. Similarly, user assignment transactions cannot have an end date after the end date of the user or territory entities.

- On a move or transfer transaction, the effective date in the new assignment or alignment must be coordinated with the end date for the unassignment or unalignment. For example, if you move a user from Territory A to Territory B, and the effective date is 5/1/2019, the user is effective in Territory B as of 5/1/2019, so the user must be end dated from Territory A as of midnight on 4/30/2019.

Search and Filter Functions

You can search for and filter Territories, Users, Geographies, Regions, Sales Forces, Products, Accounts, Rules, Engagement Plans, Scenarios, and Reports.

- Use **Search** at the top of a main screen to search the entire application and use the **Search** function within a module to search all data in the grid.
- Use **Filters** within a module to define a set of constraints to focus on specific information in the grid.

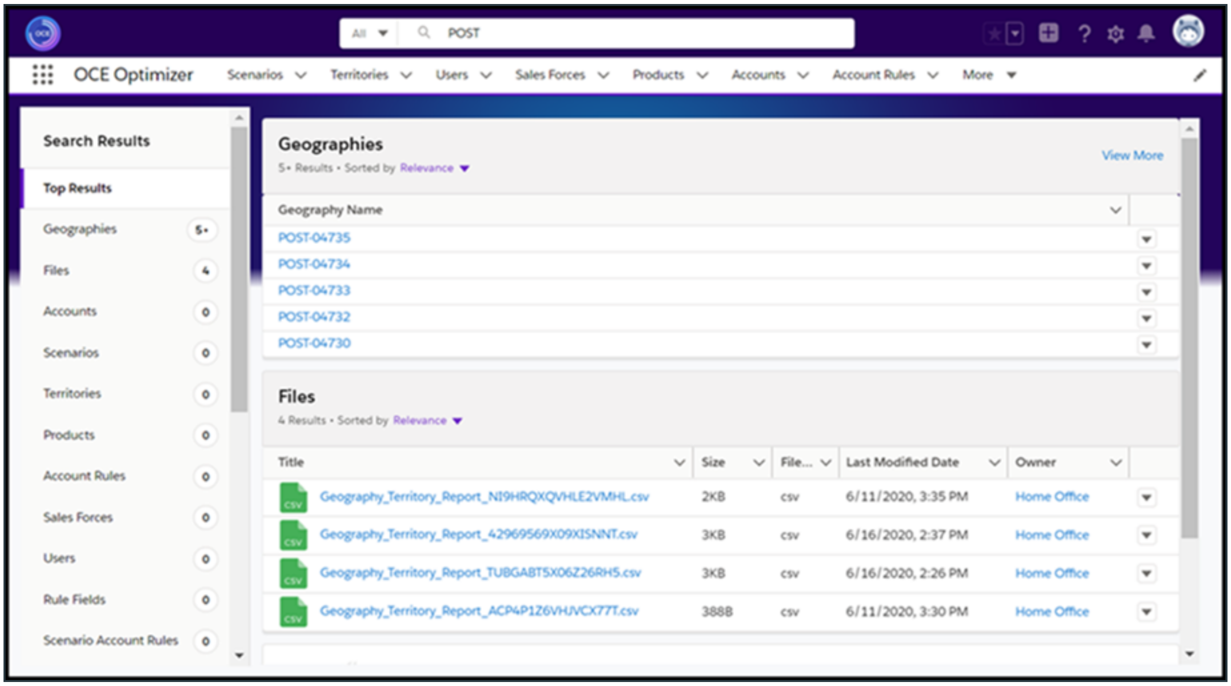
Using the Main Search Function

Search displays at the top of every main application screen. You can search the entire database, or focus on records by module.

To use the main search function

1. Select *All* to search the entire database or select a module to focus on a specific record type, then enter a keyword or phrase in the **Search** field and press **Enter**.

2. View the search results.



You can:

- Sort the results list by clicking a column header.
- View the entire list of results by clicking **View More**.
- View a record by clicking it.
- Focus the results on a type of record by selecting a module in the left pane.

Searching within a Module

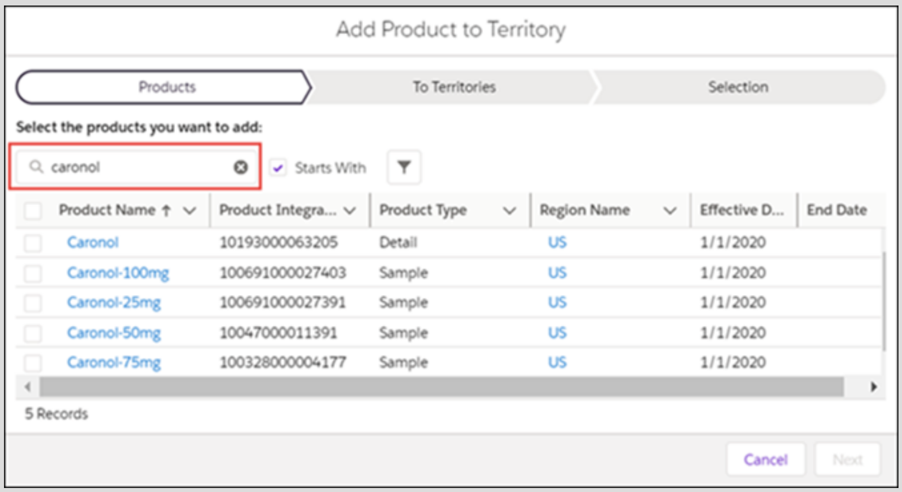
Each application module has its own **Search** function.

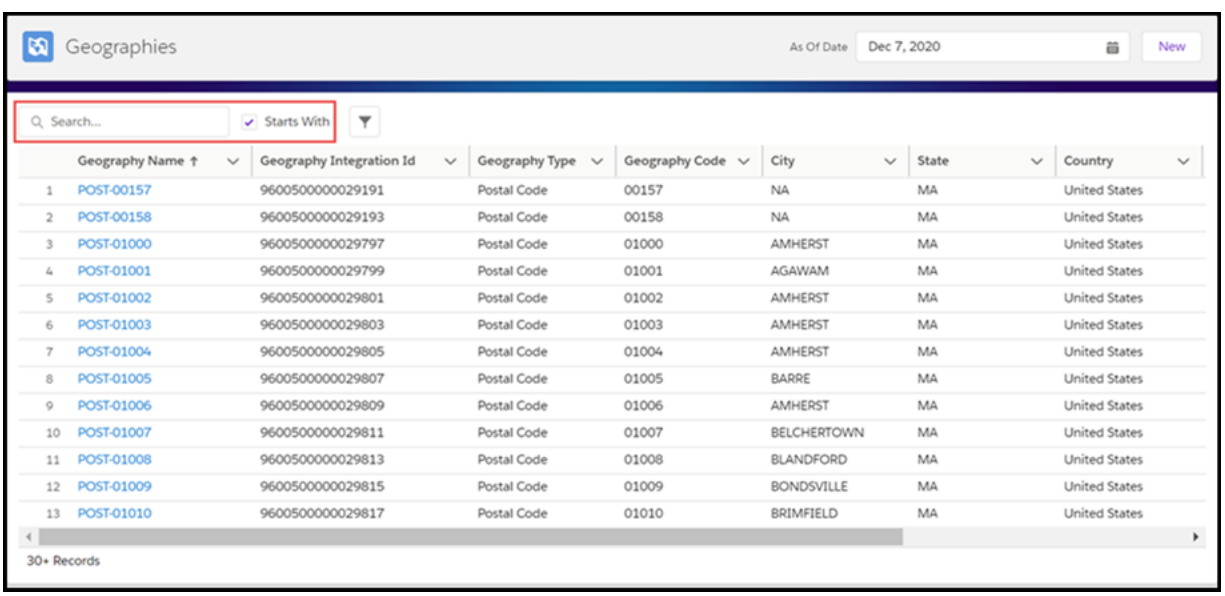
To search within a module

1. On the main screen for a module, enter a search keyword or phrase in **Search** and press **Enter**.

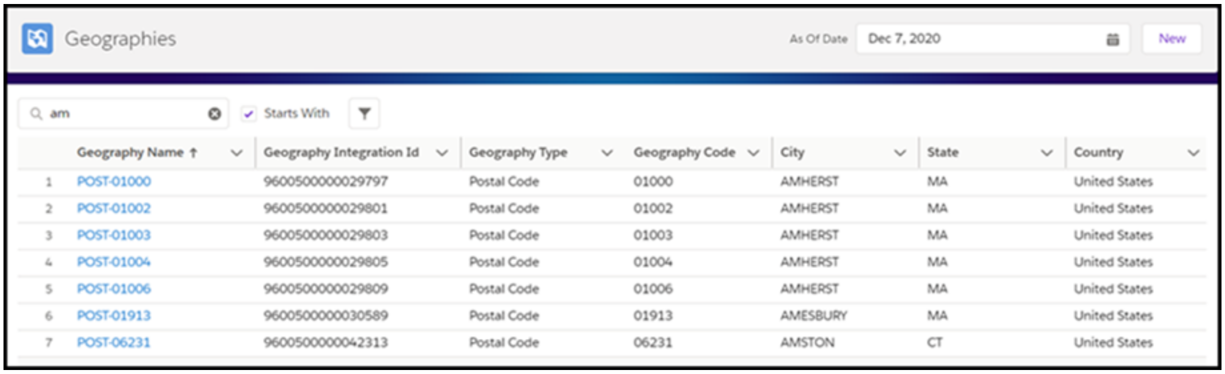
> **Tip:** If you want to limit the results to include only the words starting with the entered text, select **Starts With**. The System administrator has the option to set the **Starts With** default setting to enabled (checked) or disabled (unchecked).

> **Note:** For the **Scenarios** module, use **Search** within a transaction (Products, Rules, etc.) to locate a value.
>
> For example, to add the product Caronol to a territory, enter *Caronol* in **Search**, then select the appropriate product from the results.





2. View the search results.



	Geography Name	Geography Integration Id	Geography Type	Geography Code	City	State	Country
1	POST-01000	9600500000029797	Postal Code	01000	AMHERST	MA	United States
2	POST-01002	9600500000029801	Postal Code	01002	AMHERST	MA	United States
3	POST-01003	9600500000029803	Postal Code	01003	AMHERST	MA	United States
4	POST-01004	9600500000029805	Postal Code	01004	AMHERST	MA	United States
5	POST-01006	9600500000029809	Postal Code	01006	AMHERST	MA	United States
6	POST-01913	9600500000030589	Postal Code	01913	AMESBURY	MA	United States
7	POST-06231	9600500000042313	Postal Code	06231	AMSTON	CT	United States

You can:

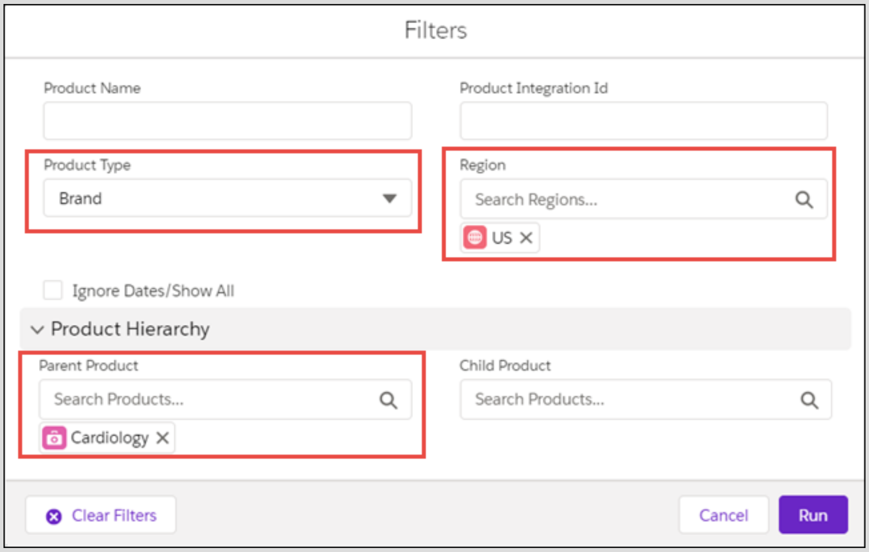
- Sort the results list by clicking a column header.
- View the details of a specific record from the list by clicking it to open the detail entity page.

Filtering Search Criteria within a Module

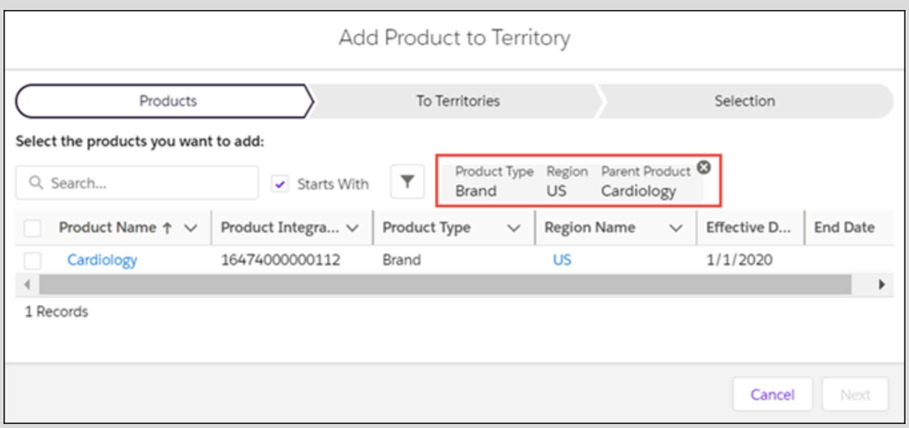
1. On the main screen for a module, click **Filters** .

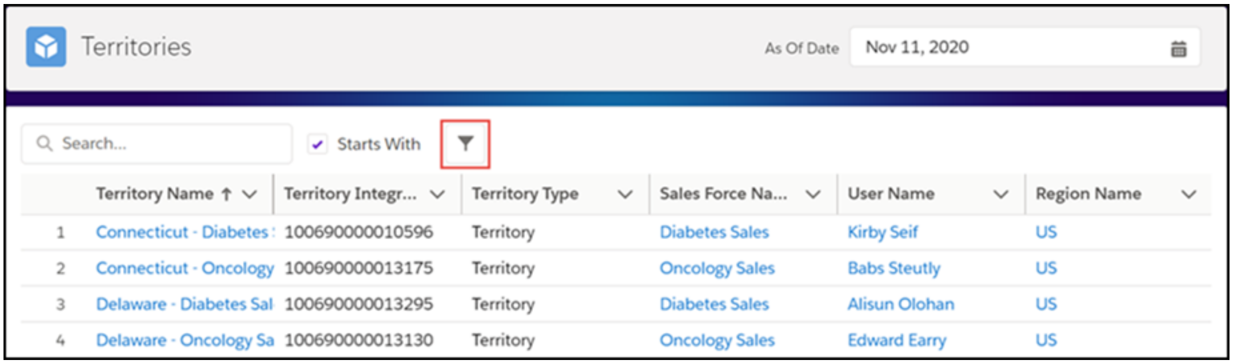
Note: In the **Scenarios** module, to filter values for a transaction, filter within that transaction.

For example, if you want to add a product with *Cardiology* as the **Parent Product** to a territory and you want the **Type** to be *Brand* and the **Region** to be *US*, make these selections on the Filters screen and click **Run**.



Select the appropriate product from the results.





2. Enter filter criteria and click **Run**.

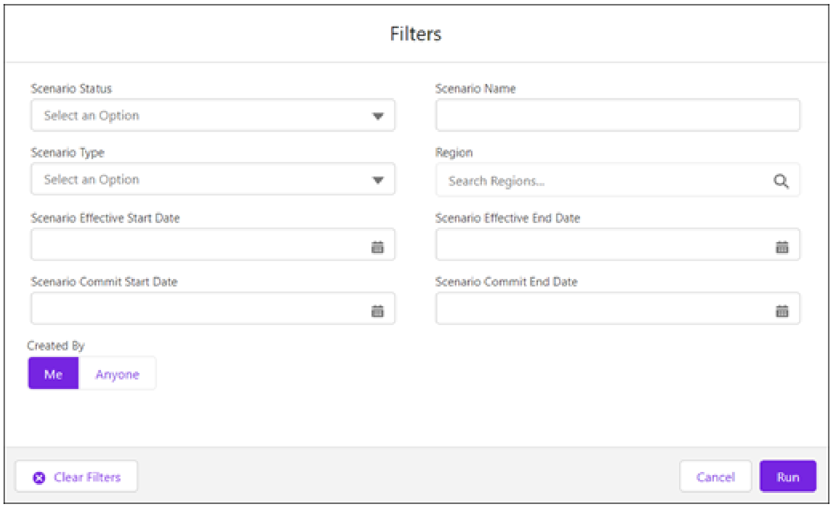
Note: For a description of the fields, see:

- Scenarios Filter Criteria
- Territories Filter Criteria
- Users Filter Criteria
- Sales Forces Filter Criteria
- Products Filter Criteria
- Accounts Filter Criteria
- Account Rules Filter Criteria
- Account Product Rules Filter Criteria
- Geographies Filter Criteria
- Regions Filter Criteria
- Engagement Plans Filter Criteria

- Click **Cancel** to go back to the main module screen.
- Click **Clear Filters** to remove data from the fields.

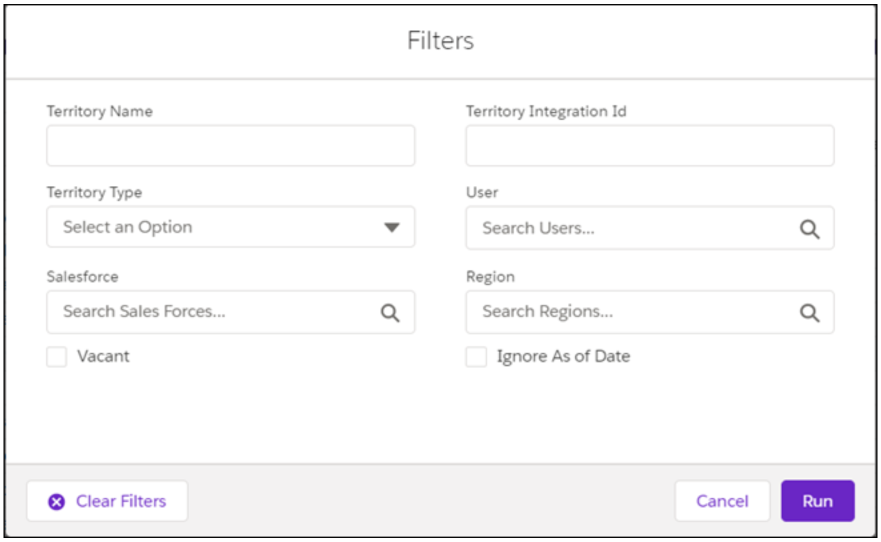
The results display based on your filter criteria.

Scenarios Filter Criteria



- **Scenario Status**: Scenario status, such as *Committed* or *Pending*.
- **Scenario Name**: Name of the scenario.
- **Scenario Type**: Type of the scenario, such as *User* or *Adjudication*.
- **Region**: The regions included in the scenario.
- **Scenario Effective Start Date**: Searches for all scenarios with the scenario effective date greater than or equal to the effective start date entered.
- **Scenario Effective End Date**: Searches for all scenarios with the scenario effective date less than or equal to the effective end date entered.
- **Scenario Commit Start Date**: Searches for all scenarios with the scenario commit date greater than or equal to the commit start date entered.
- **Scenario Commit End Date**: Searches for all scenarios with the scenario commit date less than or equal to the commit end date entered.
- **Created By**: Name of the user who created the scenario.

Territories Filter Criteria

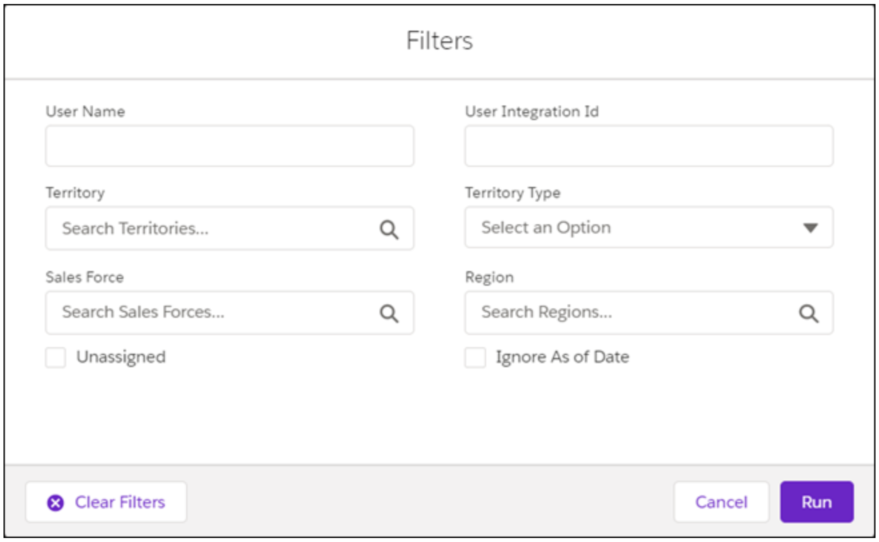


- **Territory Name**: Name of the territory.
- **Territory Integration ID**: Unique territory identification number.
- **Territory Type**: Type of territory, such as *Territory*, *District*, *Area*, or *Business Unit*.
- **User**: Name of a user.
- **Sales Force**: Sales force the territory belongs to or is aligned to.
- **Region**: Region the territory belongs to or is aligned to.
- **Vacant**: If selected, only territories where no users are assigned display.

  > **Note:** Only the primary assignment type is considered when filtering on **Vacant**.

- **Ignore As of Date**: If selected, all territories display. Territories that are end dated or not active until a future date are also included.

Users Filter Criteria

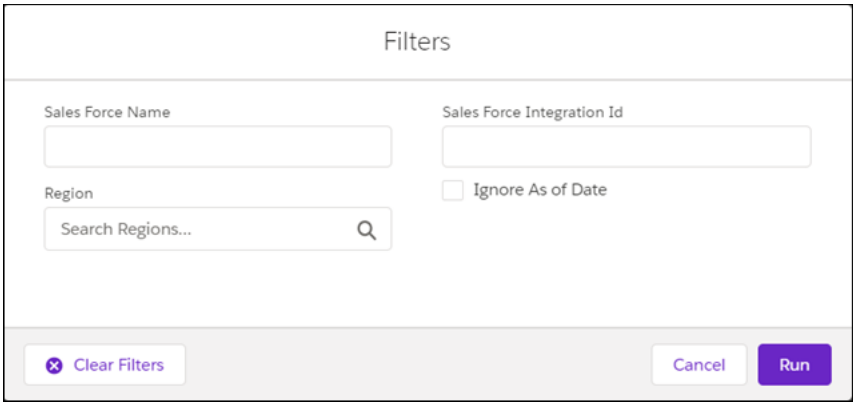


- **User Name**: Name of the user(s).
- **User Integration ID**: Unique user identification number.
- **Territory**: The name of the territory the user is assigned to.
- **Territory Type**: Type of territory, such as *Territory*, *District*, *Region*, *Area*, or *Business Unit*.
- **Sales Force**: Sales force that the assigned territory belongs to or is aligned to.
- **Region**: Region that the assigned territory belongs to or is aligned to.
- **Unassigned**: If selected, only users unassigned to a territory display.

  Note: Only the primary assignment types are considered when filtering on **Unassigned**.

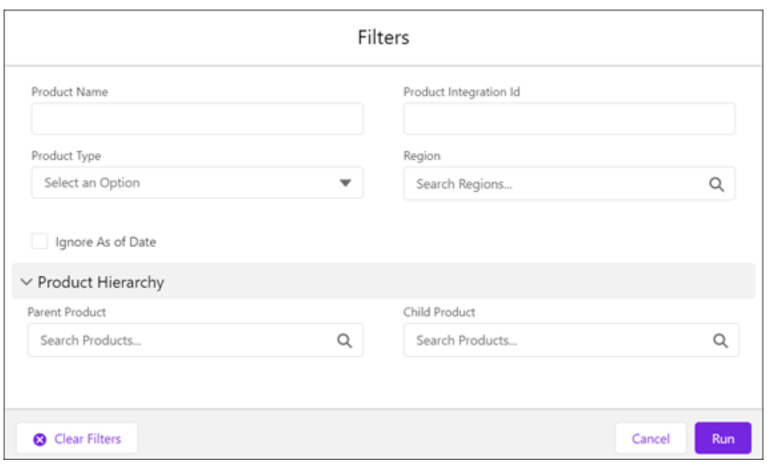
- **Ignore As of Date**: If selected, all users display. Users that are end dated or not active until a future date are also included.

Sales Forces Filter Criteria



- **Sales Force Name**: Name of the sales force(s).
- **Sales Force Integration ID**: Unique sales force identification number.
- **Region**: The region the sales force is aligned to.
- **Ignore As of Date**: If selected, all sales forces display. Sales Forces that are end dated or not active until a future date are also included.

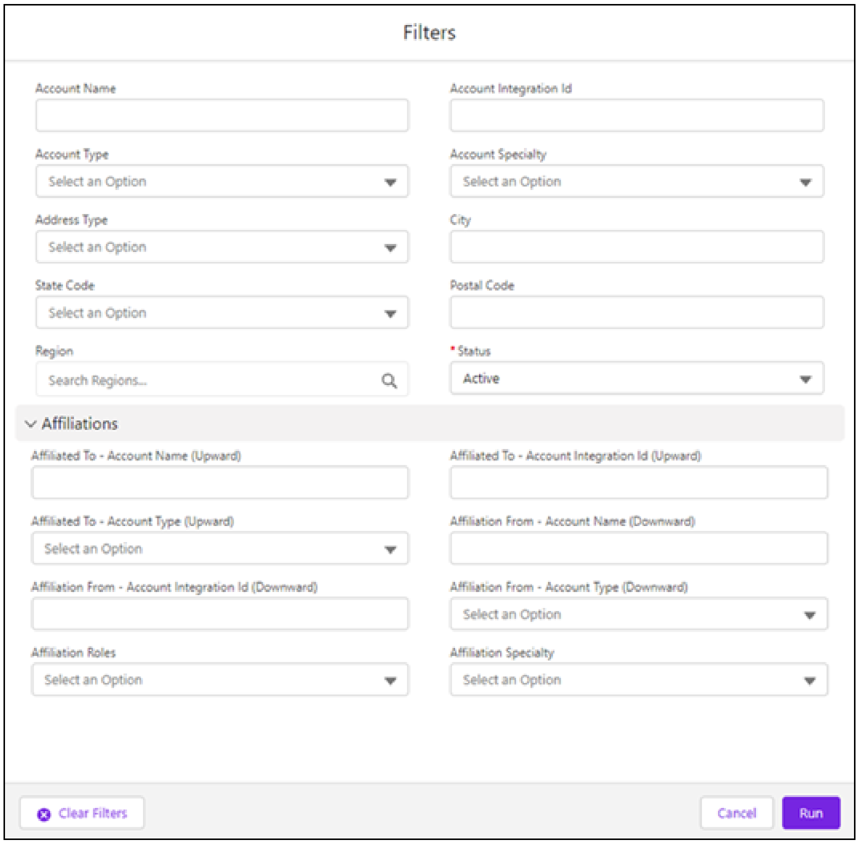
Products Filter Criteria



- **Product Name**: Name of the product(s).
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product. For example, *Market*, *Brand*, *Detail*, *Sample*, etc.
- **Region**: The region the product is assigned to.

- **Ignore As of Date**: If selected, all products display. Products that are end dated or not active until a future date are also included.
- **Parent Product**: The parent product (downward) name.
- **Child Product**: The child product (upward) name.

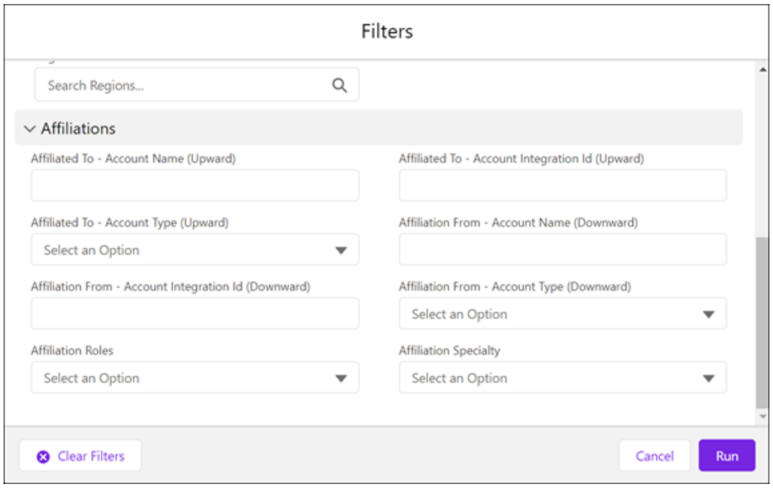
Accounts Filter Criteria



- **Account Name**: Name of the account(s).
- **Account Integration ID**: Unique account identification number.
- **Account Type**: The type of account, such as *Department* or *Institution*.
- **Account Specialty**: Area or expertise.
- **Address Type**: The type of the Account address, such as *Residential*, *Shipping*, *Billing*, or *Business*.
- **City**: The city of the Account address.
- **State Code**: The state code that corresponds to the state of the account address.

- **Postal Code**: The postal code of the Account address.
- **Region**: The region the account address is in.
- **Status**: Select *Active* to display active accounts (default), *Inactive* to display inactive accounts, or *Select All* to view both.

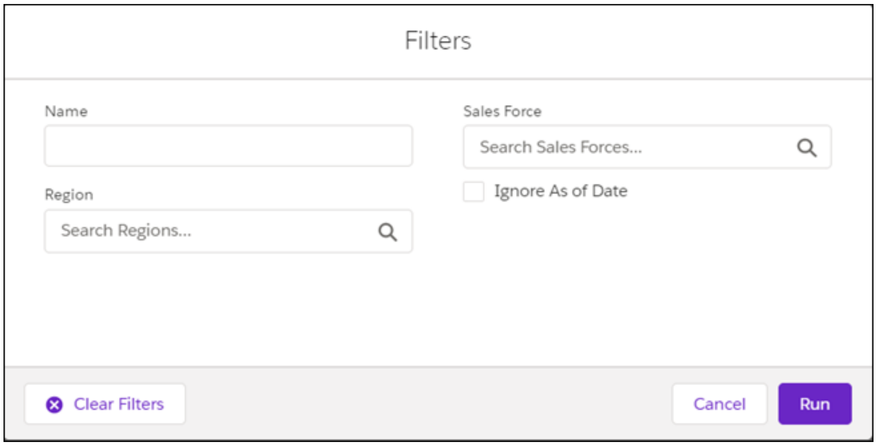
Accounts Filter Criteria - Affiliations



- **Affiliated To - Account Name (Upward)**: Name of the child account directly affiliated to the account.
- **Affiliated To - Account Integration Id (Upward)**: Name of the child account integration Id directly affiliated to the account.
- **Affiliated To - Account Type (Upward)**: Select the child account type, such as *Department*, *Institution*, *Pharmacy*, etc., directly affiliated to the account.
- **Affiliated From - Account Name (Downward)**: Name of the parent account directly affiliated from the account.
- **Affiliation From - Account Integration Id (Downward)**: Name of the parent account integration Id directly affiliated from the account.
- **Affiliation From - Account Type (Downward)**: Select the type of the parent account, such as such as *Department*, *Institution*, *Pharmacy*, etc., directly affiliated from the account.
- **Affiliation Roles**: Select the roles affiliated with the account, such as *Consulting*, *Program*, *Staff*, etc.

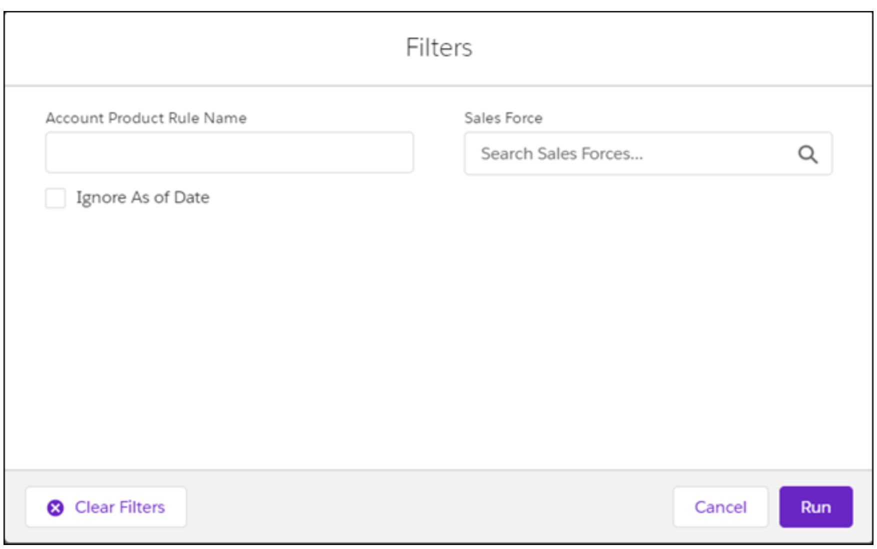
- **Affiliation Specialty**: Select the specialty affiliated with the account, such as *Adolescent medicine*, *Medical genetics*, *Trauma surgery*, etc.

Account Rules Filter Criteria



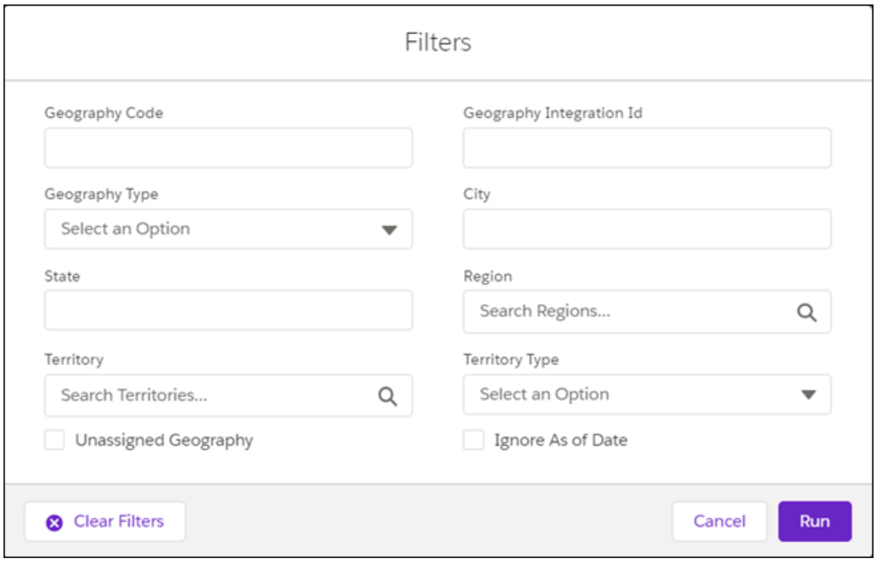
- **Name**: Name of the account alignment rule.
- **Sales Force**: The sales force the rule applies to.
- **Region**: The region the rule applies to.
- **Ignore As of Date**: If selected, all rules display. Account alignment rules that are end dated or not active until a future date are also included.

Account Product Rules Filter Criteria



- **Account Product Rule Name**: Name of the account product restriction rule.
- **Sales Force**: The sales force the rule applies to.
- **Ignore As of Date**: If selected, all rules display. Account product restriction rules that are end dated or not active until a future date are also included.

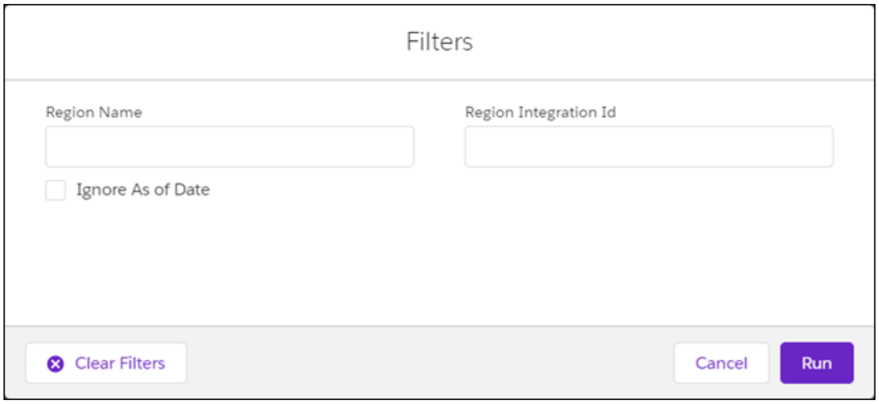
Geographies Filter Criteria



- **Geography Code**: The code or ID for the specific geography, such as postal code 10001 for New York City.
- **Geography Integration ID**: Unique geography identification number.
- **Geography Type**: The type or level of geography, such as *postal code, brick, or micro brick*.
- **City**: The city where the geography is located.
- **State**: The state where the geography is located.
- **Region**: The region the geography is linked to.
- **Territory**: The Territory the geography is assigned to.
- **Territory Type**: Type of territory, such as *Territory*, *District*, *Region*, *Area*, or *Business Unit*.
- **Unassigned Geography**: If selected, only geographies not assigned to any territory display.

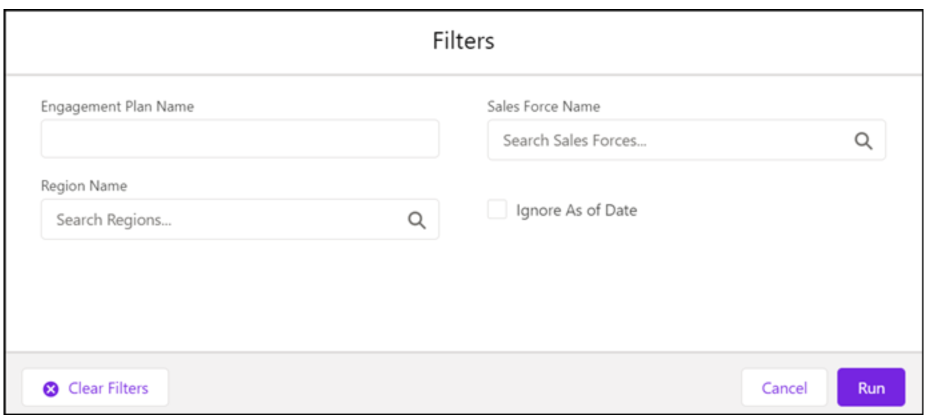
- **Ignore As of Date**: If selected, all geographies display. Geographies that are end dated or not active until a future date are also included.

Regions Filter Criteria



- **Region Name**: Name of the region.
- **Region Integration ID**: Unique region identification number.
- **Ignore As of Date**: If selected, all regions display. Regions that are end dated or not active until a future date are also included.

Engagement Plans Filter Criteria



- **Engagement Plan Name**: The name of the engagement plan.
- **Sales Force Name**: The name of the sales force aligned to the engagement plan.
- **Region Name**: The name of the region aligned to the engagement plan.
- **Ignore As of Date**: If selected, all engagement plans display. Engagement plans that are end dated or not active until a future date are also included.

Page Notifications

An administrator can configure rules that trigger the creation of page-specific notifications. For example, you may receive a notification that your scenario has completed processing, or your Account Territory Report is ready, or that your scenario encountered errors during processing.

When a notification is sent, **Notifications** in the upper-right corner of the screen displays the number of unread notifications in the list. Click it to open the Notifications pane.

Use the Notifications Pane

Click **Notifications** in the upper-right corner of the screen to open the Notifications Pane and view the list of notifications on a page, if there are any.

You can:

- Scroll up and down to view notifications.
- Click a message to go to the record.

  Note: The color of the message indicates whether it's new (light gray) or read (white). The messages change from light gray to white after you access the record via the message.

- Click **Mark all as read** if you want all the messages to be marked as *read* without accessing the record.
- Click outside of the Notifications Pane to close it.

Export and Bulk Export Data into a File

Throughout the OCE Optimizer application, you can export data into a CSV (comma-separated values) file. A CSV file is a simple text file in which information is separated by commas.

Within certain modules of OCE Optimizer, you can also export data in bulk into a Microsoft® Excel® (.xlsx) file. When you use bulk export, all related records for the selected entity are included on separate tabs in a single Excel file.

You can perform bulk export from the main screen of these modules:

- Territories
- Users

- Sales Forces
- Products
- Accounts
- Geography

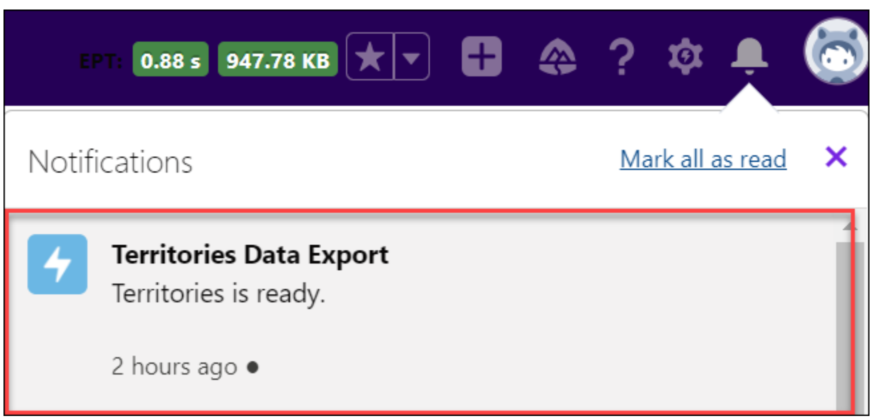
Note: Customized bulk import and export functionality is also available based on your specific needs. Contact your system administrator for details.

To export data into a CSV file

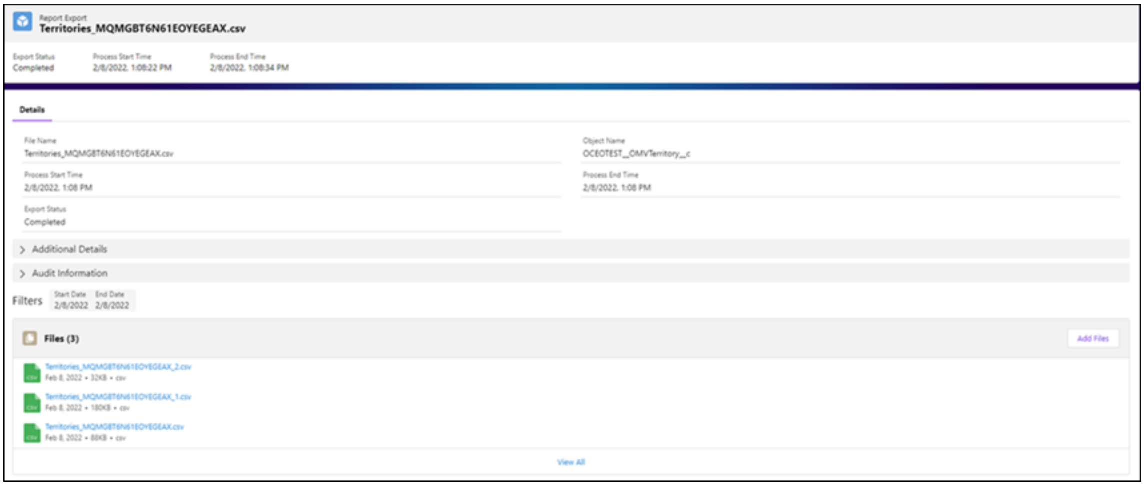
1. Click **Export**. When the export starts, an Exporting File message appears.

When the process completes, a notification displays in the upper-right corner of the screen.

2. Click **Notifications** to view the status of the export.



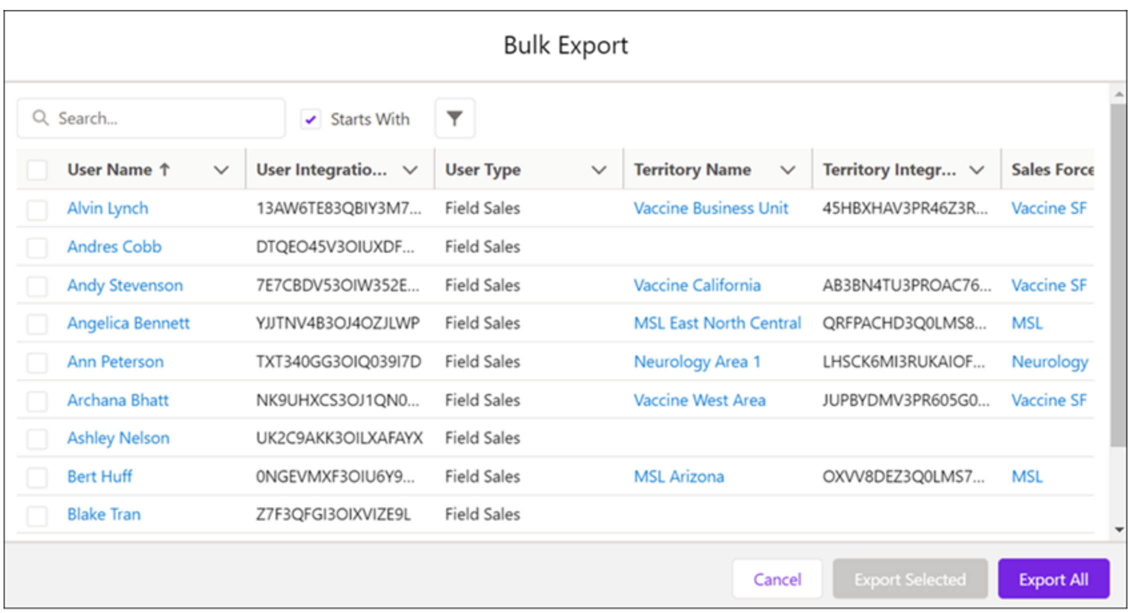
3. Click the message to open the Report Export.



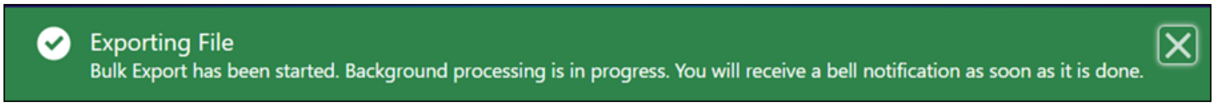
4. In the **Files** section, click a file name to open and download the file.

To bulk export data into an .xlsx file

1. Click **Bulk Export**.

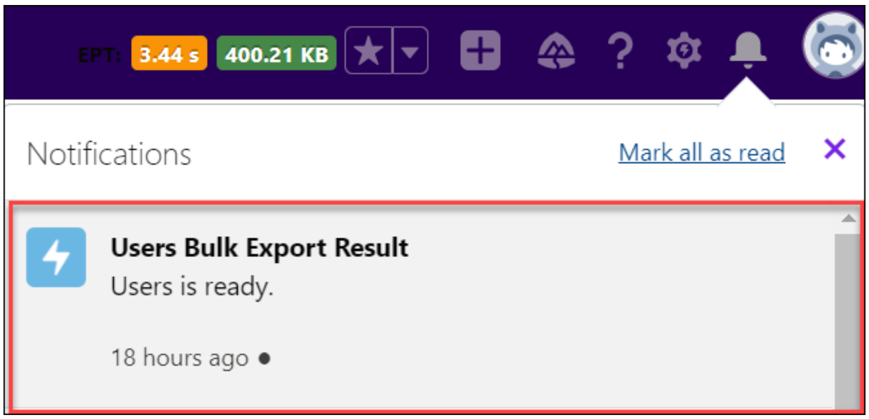


2. Select the check boxes beside the information you want to export and click **Export Selected**. Otherwise, click **Export All**. When the export starts, an Exporting File message appears.

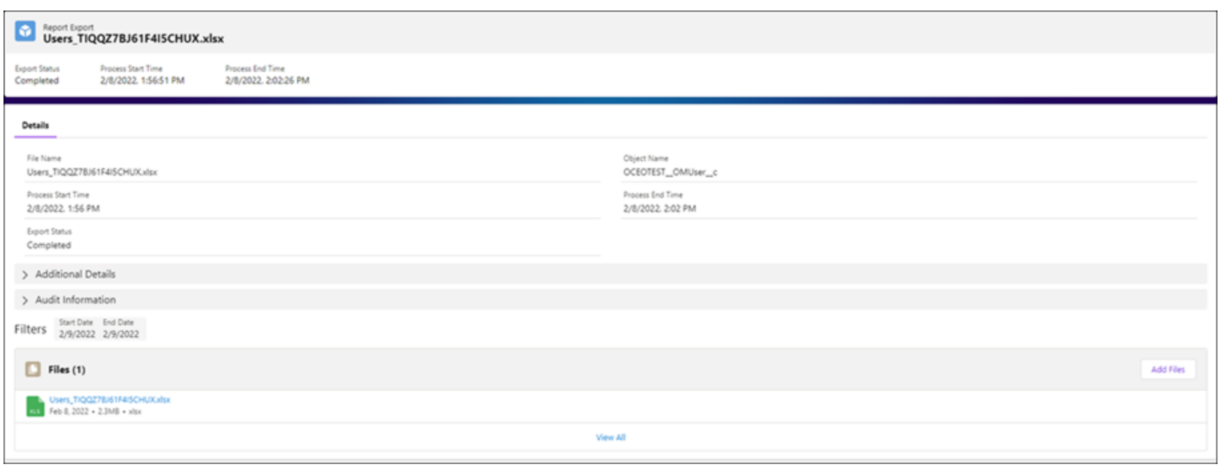


When the process completes, a notification displays in the upper-right corner of the screen.

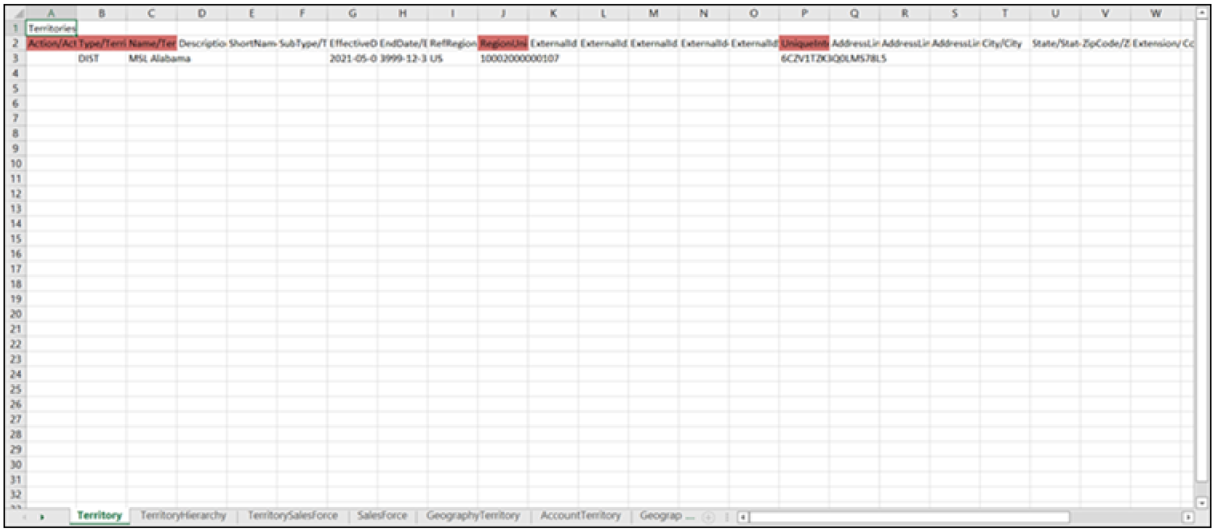
3. Click **Notifications**  to view the status of the bulk export.



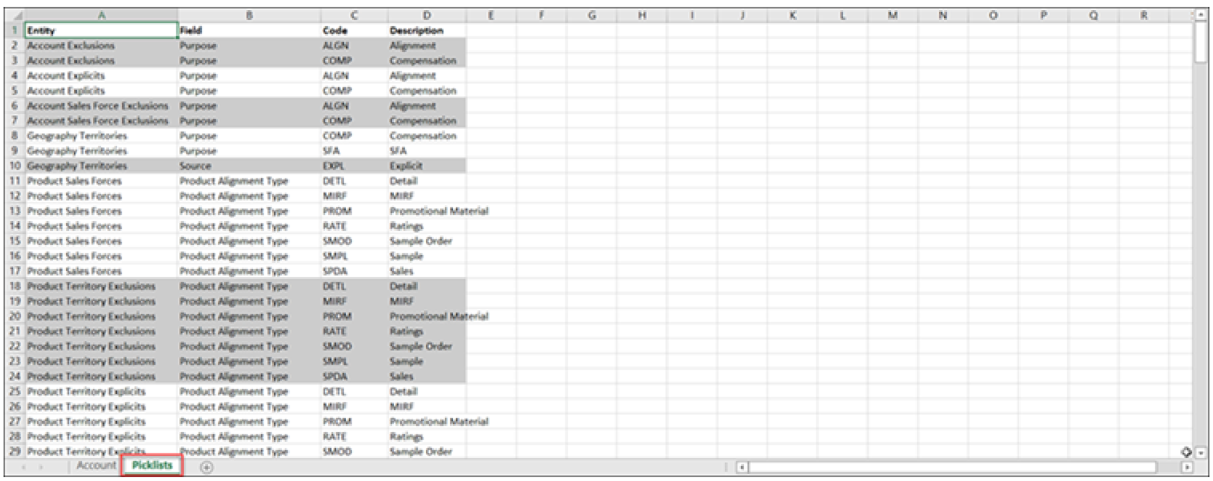
4. Click the message to open the Report Export.



5. In the **Files** section, click a file name to open and download the file. The spreadsheet contains the exported data on one or more tabs, with required fields in the template highlighted in red.



The **Picklists** tab contains code descriptions used in the template.



Entity	Field	Code	Description
Account Exclusions	Purpose	ALGN	Alignment
Account Exclusions	Purpose	COMP	Compensation
Account Explicits	Purpose	ALGN	Alignment
Account Explicits	Purpose	COMP	Compensation
Account Sales Force Exclusions	Purpose	ALGN	Alignment
Account Sales Force Exclusions	Purpose	COMP	Compensation
Geography Territories	Purpose	COMP	Compensation
Geography Territories	Purpose	SFA	SFA
Geography Territories	Source	EXPL	Explicit
Product Sales Forces	Product Alignment Type	DETL	Detail
Product Sales Forces	Product Alignment Type	MIRF	MIRF
Product Sales Forces	Product Alignment Type	PROM	Promotional Material
Product Sales Forces	Product Alignment Type	RATE	Ratings
Product Sales Forces	Product Alignment Type	SMOD	Sample Order
Product Sales Forces	Product Alignment Type	SMPL	Sample
Product Sales Forces	Product Alignment Type	SPDA	Sales
Product Territory Exclusions	Product Alignment Type	DETL	Detail
Product Territory Exclusions	Product Alignment Type	MIRF	MIRF
Product Territory Exclusions	Product Alignment Type	PROM	Promotional Material
Product Territory Exclusions	Product Alignment Type	RATE	Ratings
Product Territory Exclusions	Product Alignment Type	SMOD	Sample Order
Product Territory Exclusions	Product Alignment Type	SMPL	Sample
Product Territory Exclusions	Product Alignment Type	SPDA	Sales
Product Territory Explicits	Product Alignment Type	DETL	Detail
Product Territory Explicits	Product Alignment Type	MIRF	MIRF
Product Territory Explicits	Product Alignment Type	PROM	Promotional Material
Product Territory Explicits	Product Alignment Type	RATE	Ratings
Product Territory Explicits	Product Alignment Type	SMOD	Sample Order

Configurations Home Office

HO Super Users and administrators use the **Configurations Home Office** tab to create User Field Titles so that global and regional HO users and field administrators can add field titles to users. Field titles can be defined at the user level or at the user-territory level based on the configuration setting.

Note: Field Title use is parameter-driven and is controlled by the system administrator.

See:

- Create a User Field Title
- User Field Titles
- Add a Field Title to a User
- Modify a User's Field Title
- Add a Field Title to a User via Territory
- Modify a User's Field Title via Territory

Create a User Field Title

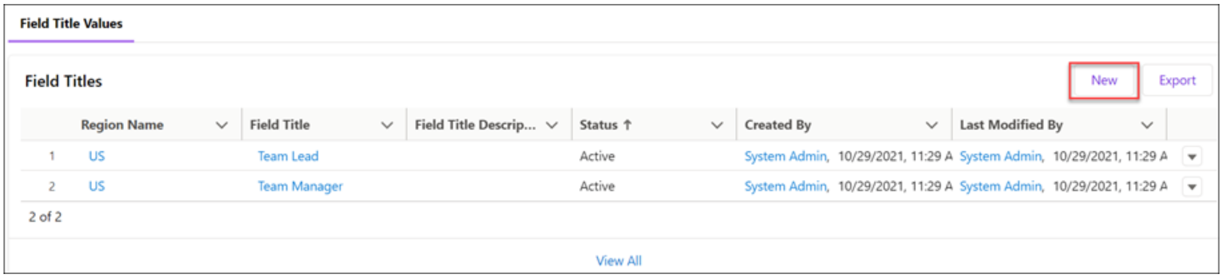
HO Super Users and administrators can create User Field Titles.

Note: Field Title use is parameter-driven and is controlled by the system administrator. Administrators can also use a parameter to define whether field titles are required for primary assignment types only or for all assignment types.

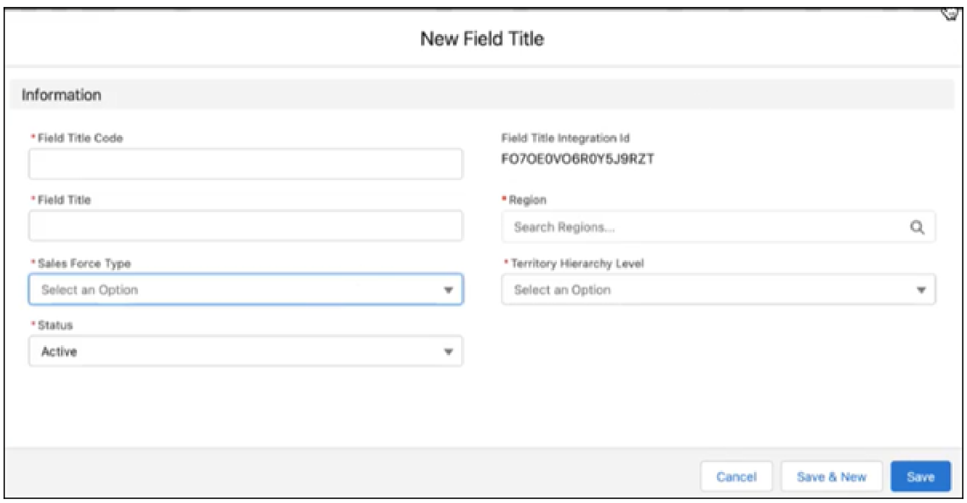
Create User Field Titles

1. Click **Configurations Home Office** from the primary navigation bar.

2. From the **Field Titles** section, click **New**.



3. Enter the new field title information and click **Save**, or click **Save and New** to create another field title.



- **Field Title Code**: Name of the field title. For example, *Representative*.
- **Field Title Integration Id**: Unique, system-generated field title identification number.
- **Field Title**: An optional description of the field title.
- **Region**: Region for which the field title is valid.
- **Sales Force Type**: The sales force type for which the field title is valid.

> **Note:** This field displays only if the Field User Validation parameter is set to *User-Territory* by the system administrator.

- **Territory Hierarchy Level**: The level of the territory the field title is assigned to.

> **Note:** This field displays only if the Field User Validation parameter is set to *User-Territory* by the system administrator.

- **Status**: The status of the field title. (*Active* or *Obsolete*).

> **Note:** Only *Active* field titles can be assigned to a user.

View Dashboard

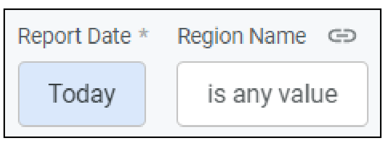
An HO user can have operational insight by viewing the accounts gained and lost for a region for a rolling 30-day period. The user can also drill down on specific days and see what happened to a specific account and/or territory.

Daily Account Alignment Processing

You can view either a Column Chart view or a Grid View

Column Chart View

1. To view a Column Chart, click (the default).
2. At the top right, click 2 filters. The filters **Report Date** and **Region Name** appear on the left.



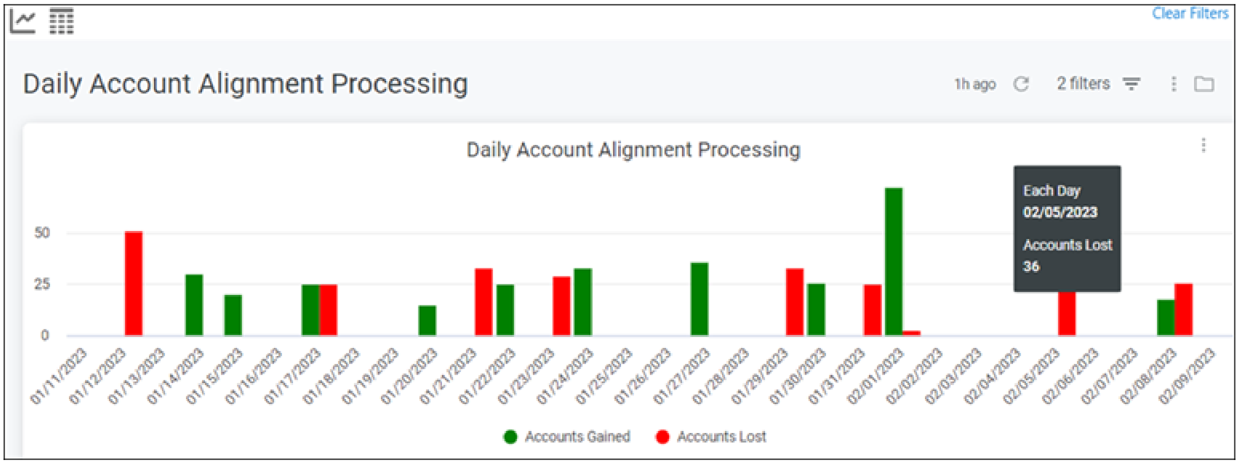
   a. For **Report Date**, the default date is today. You can change the date to view 30 days from the date you select.

   b. For **Region Name**, you can pick a value.

The Column Chart displays data for a rolling 30 days, using two bar charts.

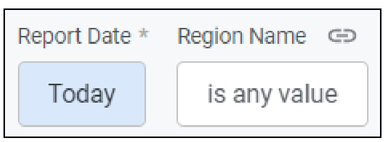
- **Accounts Gained**: (in green) Shows the accounts gained, both dynamic and explicit. This is calculated using dynamic + explicit + update effective/end date extending the account alignment effective/end date.
- **Accounts Lost**: (in red) Shows the accounts lost. This is calculated using dynamic + explicit + update effective/end date truncating account alignment effective/end date + deletes of account

territory alignments.



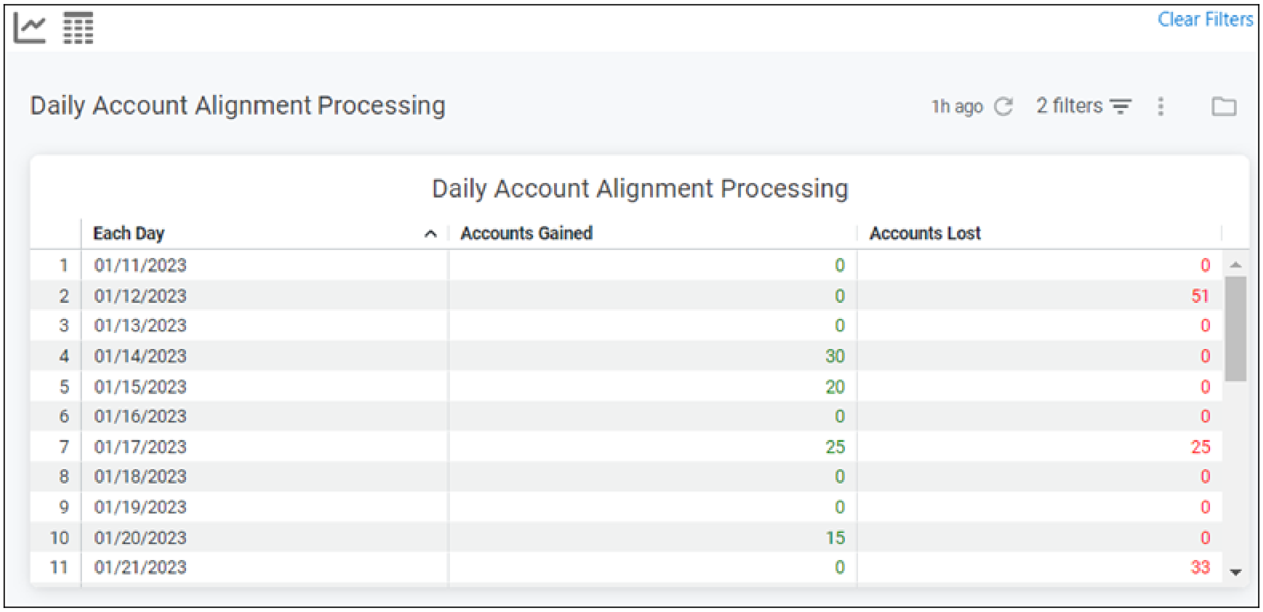
Grid View

1. To view a grid, click .
2. At the top right, click 2 filters . The filters **Report Date** and **Region Name** appear on the left.



   a. For **Report Date**, the default date is today. You can change the date to view 30 days from the date you select.

b. For **Region Name**, you can pick a value.

3. 

	Each Day	Accounts Gained	Accounts Lost
1	01/11/2023	0	0
2	01/12/2023	0	51
3	01/13/2023	0	0
4	01/14/2023	30	0
5	01/15/2023	20	0
6	01/16/2023	0	0
7	01/17/2023	25	25
8	01/18/2023	0	0
9	01/19/2023	0	0
10	01/20/2023	15	0
11	01/21/2023	0	33

The grid view shows the following columns. The counts include all account territory alignment changes; that is, all changes initiated by the nightly process, scenario processing via UI or API. A Regional User can view only the regions within their sphere of influence.

- **Each Day**: Day on which the nightly recalculation process was run.
- **Accounts Gained**: Number of accounts gained on that day.
- **Accounts Lost**: Number of accounts lost on that day.

View Territories

A Territory is any level in the Sales Force hierarchy, such as an area, district, or territory, composed of geographic entities and accounts. Territories are linked by a parent/child relationship that builds the Territory hierarchy within a Sales Force.

Territory data can be managed via the **Scenarios** module.

Important: If you receive a message that **Governor Limits** have been reached, contact the Product owner immediately.

View Territory Information

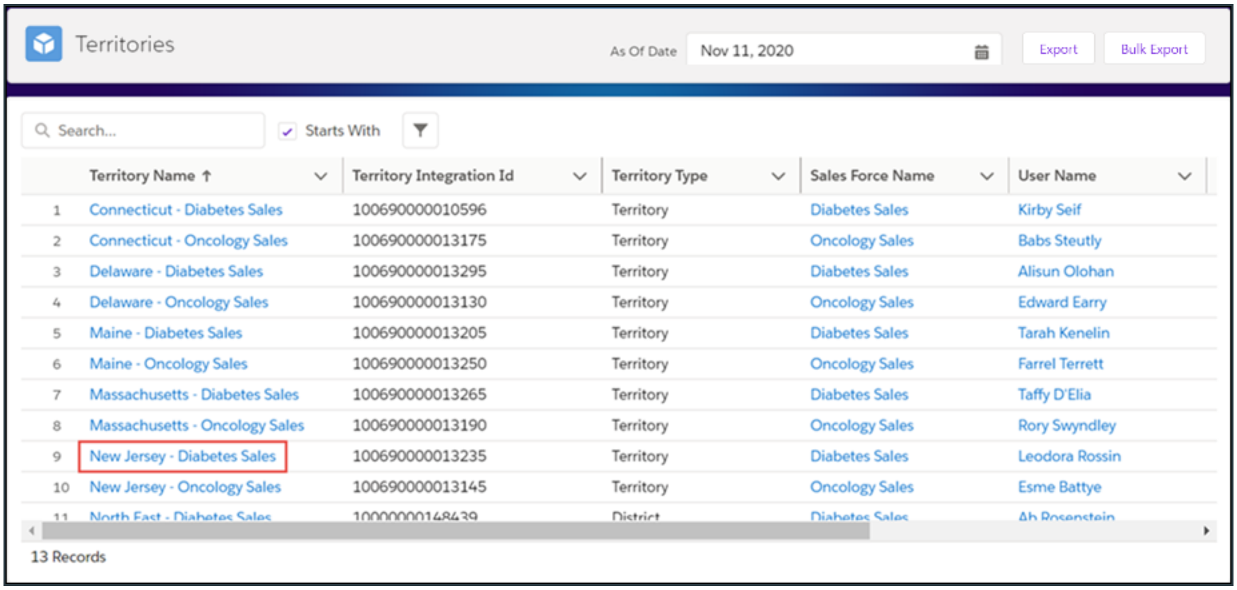
The **Territory** module displays general information for the region, user assignments, territory parent and child links, sales forces, audit information, external IDs, account alignments, geography alignments, product alignments, the history of changes made to the territory, the history of changes made to alignments, and the hierarchical structure of the territory.

Territory information displayed is based on the **As Of Date** field.

To view territory information

1. Click **Territories** from the primary navigation bar.
2. From the Territories screen, select the territory you want to view.

   Note: Use the **Search** and **Filters** functions to help you locate the territory. See Search and Filter Functions.



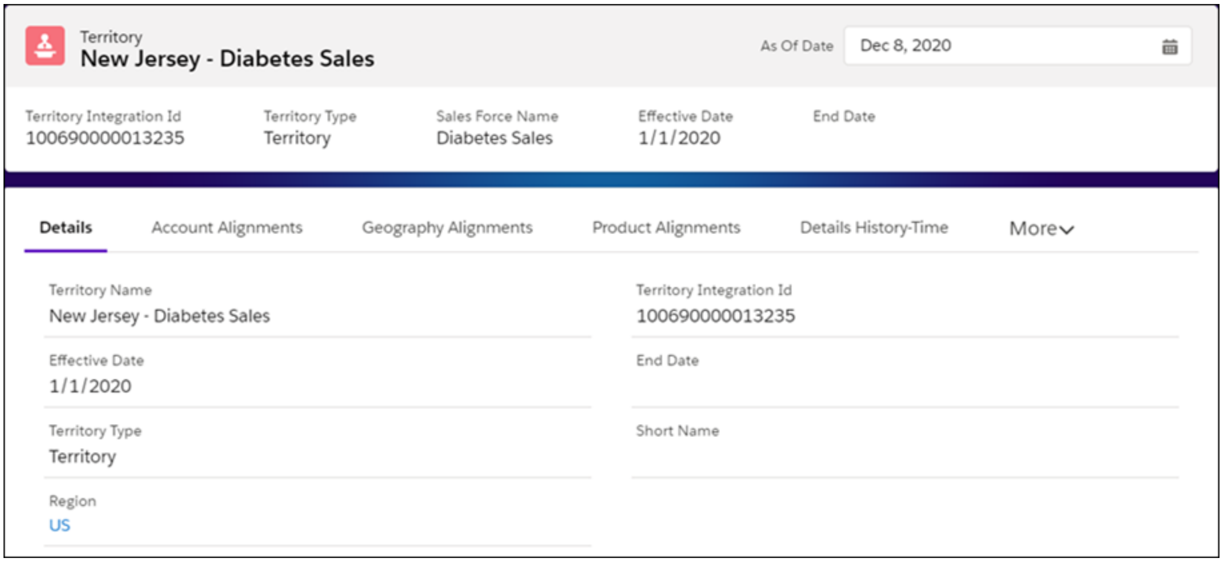
3. View the territory's information.

The Territory Name, As Of Date, and the Territory highlight section displays on the top of the Territory entity page for all the Territory tabs.

As Of Date: The data displayed for the territory is based on the date selected in this field.

Highlight Section

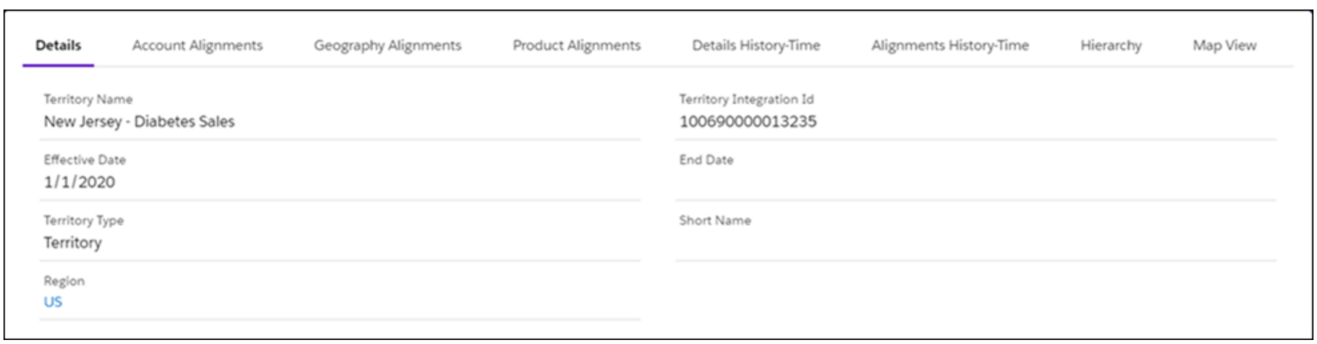
- **Territory Name**: Name of the territory.
- **Territory Integration ID**: Unique territory identification number.
- **Territory Type**: Type of territory, such as Territory, District, Area, or Business Unit.
- **Sales Force Name**: Name of the sales force aligned to the territory.
- **Effective Date**: Indicates the date when the territory is active/valid.
- **End Date**: Indicates the date after which the territory is no longer active/valid.



Territory Details Tab

The **Details** tab contains general information about the territory, territory parent and child links, user assignments, sales forces, audit information, and external IDs. The data displayed is the current view based on the As Of Date.

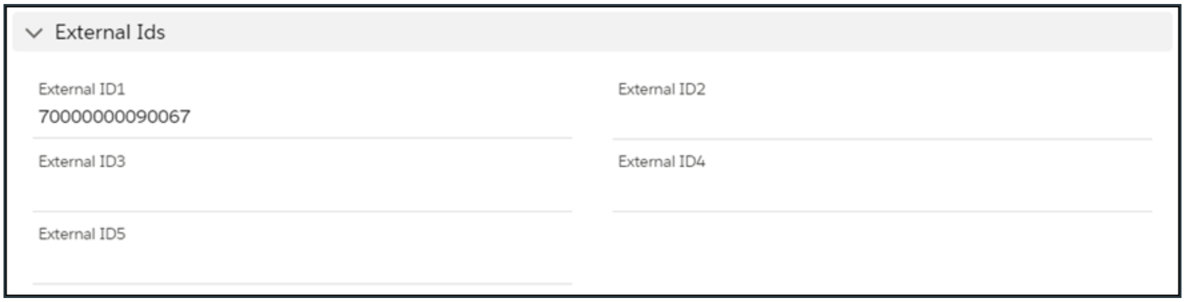
General Information



- **Territory Name**: Name of the territory.
- **Territory Integration ID**: Unique territory identification number.
- **Effective Date**: Indicates the date when the territory is active/valid.
- **End Date**: Indicates the date after which the territory is no longer active/valid.
- **Territory Type**: Type of territory, such as Territory, District, Area, or Business Unit.

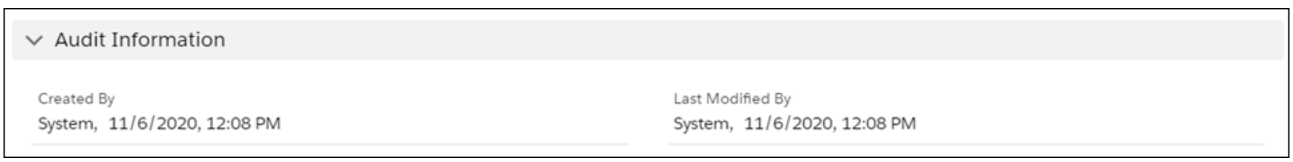
- **Short Name**: A further classification of territory type.
- **Region**: The region the territory is aligned to.

External IDs



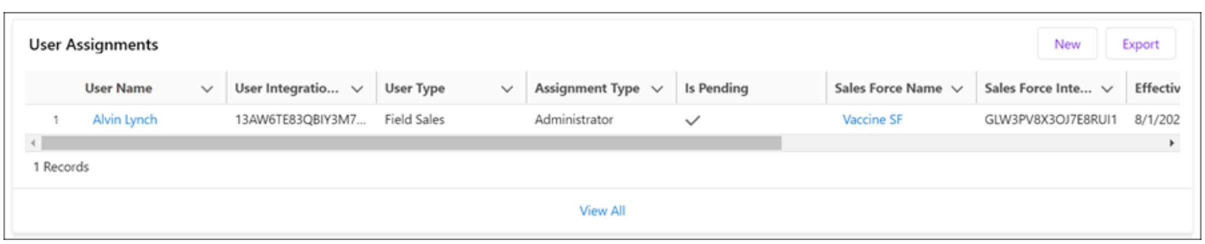
- **External ID1—ID5**: Additional identification numbers for cross referencing.

Audit Information



- **Created By**: A combination of the creator's user name and the date/time the territory was created.
- **Last Modified By**: A combination of the user name of the last person to edit the territory and the date/time it was updated.

User Assignments



- **User Name**: Name of the user.
- **User Integration ID**: Unique user identification number.
- **Assignment Type**: Primary, Secondary, or Administrator.
- **Effective Date**: Indicates the date when the assignment is active/valid.

- **End Date**: Indicates the date after which the assignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the assignment was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the assignment and the date/time it was updated.

Note: Unless configured differently in the application, a territory can have only one user assigned as primary.

Note: To assign a user to a territory, click **New**.

To edit the user's **Assignment Type** and assignment **Effective Date** and **End Date**, use the **Edit** action available from the drop-down on the specific user assignment row. See Modify a User Assignment.

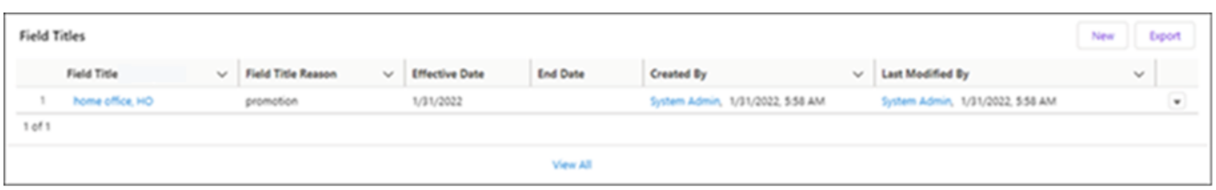
To delete a user assignment, use the **Delete** action available from the drop-down on the specific user assignment row. See Delete a User Assignment.

To add a field title, click **Add Field Title** on the specific user assignment row. This option is only available if **Field Title Validation** parameter is set to *User-Territory* by the administrator. See User Field Titles.

To move a user assignment, click **Move** on the specific user assignment row. See Move a User Assignment

Field Titles

Note: This section displays only if the administrator set the **Field Title Validation** parameter to *User-Territory*.



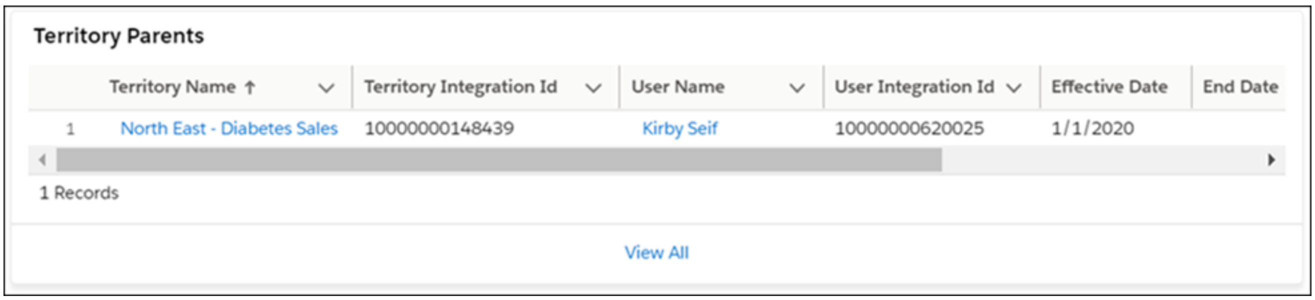
- **Field Title**: Name of the field title assigned to the user.
- **Field Title Description**: Description of the field title.
- **Effective Date**: Indicates the user assignment effective date.

- **End Date**: Indicates the user assignment end date.
- **Created By**: A combination of the creator's user name and the date/time the user's field title was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the user's field title and the date/time it was updated.

> **Note:** To edit the Field Title for a user assignment, use the **Edit** action available from the drop-down on the specific Field Title row.

For more information on Field Titles, see User Field Titles.

Territory Parents



- **Territory Name**: The name of the parent territory.
- **Territory Integration ID**: Unique territory identification number.
- **User Name**: The name of the user assigned to the territory.
- **User Integration ID**: Unique user identification number.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the parent territory was created.
- **Last Modified By**: A combination of the user name of the last person to edit the parent territory and the date/time it was updated.

Territory Children

Territory Children

	Territory Name	Territory Integration Id	User Name	User Integration Id	Effective Date	End Date
1	Connecticut - Diabetes Sales	100690000010596	Kirby Seif	10000000620025	1/1/2020	
2	Delaware - Diabetes Sales	100690000013295	Alisun Olohan	10000000620293	1/1/2020	
3	Maine - Diabetes Sales	100690000013205	Tarah Kenelin	10000000620227	1/1/2020	
4	Massachusetts - Diabetes Sale	100690000013265	Taffy D'Elia	10000000620159	1/1/2020	
5	New Jersey - Diabetes Sales	100690000013235	Kirby Seif	10000000620025	1/1/2020	

5 Records

View All

- **Territory Name**: The name of the child territory.
- **Territory Integration ID**: Unique territory identification number.
- **User Name**: The name of the user assigned to the territory.
- **User Integration ID**: Unique user identification number.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the child territory was created.
- **Last Modified By**: A combination of the user name of the last person to edit the child territory and the date/time it was updated.

Sales Forces

Sales Forces

	Sales Force Name	Sales Force Integration Id	Sales Force Type	Effective Date	End Date	Created By
1	Diabetes Sales	10000000087424	Retail	1/1/2020		System, 11/6/2020, :

1 Records

View All

- **Sales Force Name**: Name of the sales force.
- **Sales Force Integration ID**: Unique sales force identification number.

- **Sales Force Type**: The type of sales force.
- **Effective Date**: Indicates the date when the sales force is active/valid.
- **End Date**: Indicates the date after which the sales force is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the sales force was created.
- **Last Modified By**: A combination of the user name of the last person to edit the sales force and the date/time it was updated.

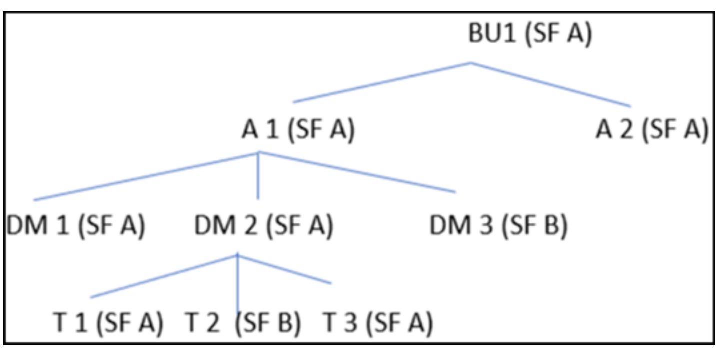
Territory Account Alignments Tab

The **Account Alignments** tab displays the account alignments, account alignments exclusions, and account alignment explicits for the territory. The data displayed is the current view based on the As Of Date.

Manager Roll-up Account Alignments

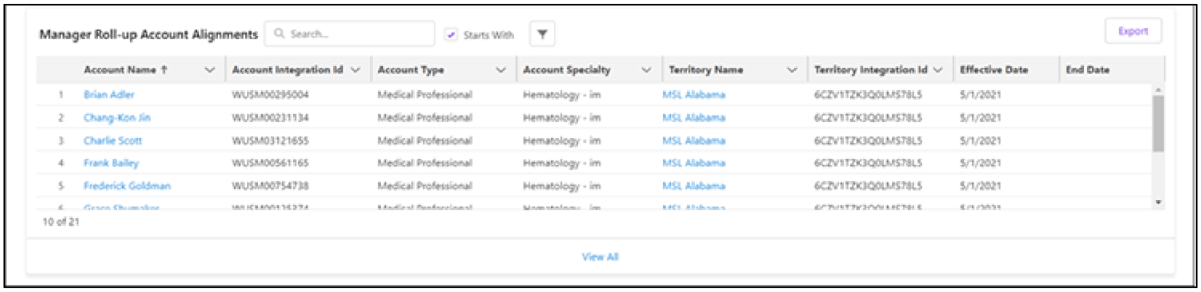
The **Manager Roll-up Account Alignments** section displays roll-up account alignments at the District Manager level. The Manager roll-up view is calculated as follows:

Note: The **Manager Roll-up Account Alignments** section displays a viewed-duplicated roll-up at the District Manager level. For example, in the diagram below, if T 1 and T 2 both have Account A aligned, this account is listed only once for the District Manager (DM 2) view.



- DM 2 should include all accounts explicitly aligned to DM 2 and all accounts dynamically aligned to DM 2
- DM 2 should include all accounts explicitly aligned to T 1, T 2, and T 3

- DM 2 should include all accounts dynamically aligned to T 1, T 2, and T 3 (including all territories that could be in different sales force from the manager's territory-sales force, for example, DM 2 is in SF A and underlying territories are in SF A and SF B)
- DM 2 should include accounts excluded for T 1 and aligned to T 2



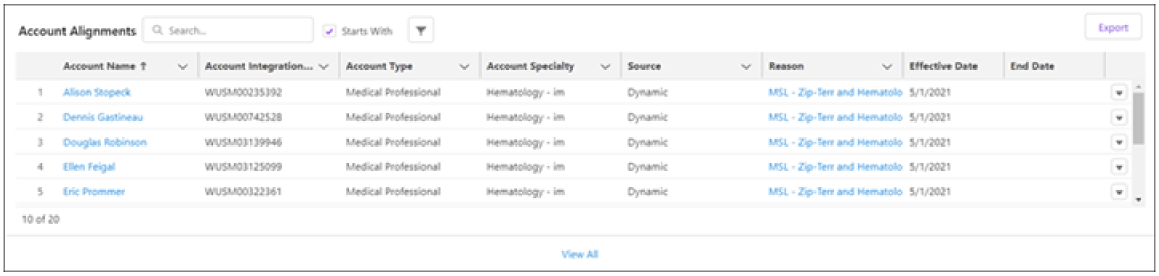
> **Note:** Use the **Search** and **Filters** functions to help you locate account alignments. See [Search and Filter Functions](#).

The Manager Roll-up Account Alignments screen displays the following information:

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Type of the aligned account.
- **Account Specialty**: Specialty of the aligned account.
- **Territory Name**: The territory or territories the account is aligned to.
- **Territory Integration ID**: Unique territory identification number.
- **Effective Date**: Indicates the date when the account alignment is active/valid.
- **End Date**: Indicates the date after which the account alignment is no longer active/valid.

Account Alignments

The **Account Alignments** section displays accounts aligned to the territory. Both dynamic and explicitly aligned account alignments are displayed.



Account Alignments

Search... Starts With

Export

	Account Name	Account Integration...	Account Type	Account Specialty	Source	Reason	Effective Date	End Date
1	Alison Stopeck	WUSM00235392	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	
2	Dennis Gastineau	WUSM00742528	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	
3	Douglas Robinson	WUSM03139946	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	
4	Ellen Feigal	WUSM03125099	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	
5	Eric Prommer	WUSM00322361	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	

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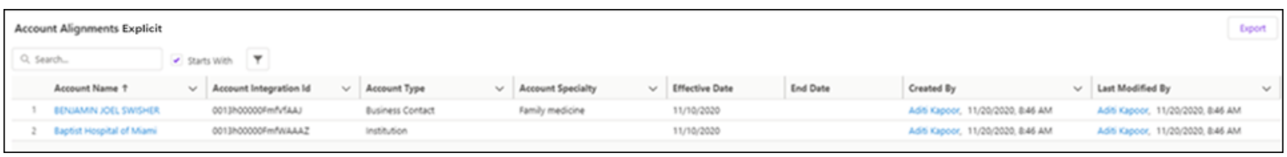
View All

Note: Use the **Search** and **Filters** functions to help you locate account alignments. See Search and Filter Functions.

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Area of expertise of the account.
- **Source**: *Dynamic* or *Explicit*.
- **Reason**: Lists rules' names involved in the dynamic account alignment.
- **Effective Date**: Indicates the date when the account alignment is active/valid.
- **End Date**: Indicates the date after which the account alignment is no longer active/valid.

Account Alignments Explicit



Account Alignments Explicit

Export

Search... Starts With

	Account Name	Account Integration Id	Account Type	Account Specialty	Effective Date	End Date	Created By	Last Modified By
1	BENJAMIN JOEL SWISHER	0013h00000FmfVfAAJ	Business Contact	Family medicine	11/10/2020		Aditi Kapoor, 11/20/2020, 8:46 AM	Aditi Kapoor, 11/20/2020, 8:46 AM
2	Baptist Hospital of Miami	0013h00000FmfWAAAZ	Institution		11/10/2020		Aditi Kapoor, 11/20/2020, 8:46 AM	Aditi Kapoor, 11/20/2020, 8:46 AM

Note: Use the **Search** and **Filters** functions to help you locate the account alignments explicit. See Search and Filter Functions.

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Area of expertise of the account.

- **Effective Date**: Indicates the date when the explicit account alignment is active/valid.
- **End Date**: Indicates the date after which the explicit account alignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the explicit account alignment was created.
- **Last Modified By**: A combination of the user name of the last person to edit the explicit account alignment and the date/time it was updated.

Account Alignments Exclusion

Note: Use the **Search** and **Filters** functions to help you locate the account alignments explicit. See Search and Filter Functions.

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Area of expertise of the account.
- **Effective Date**: Indicates the date when the account alignment exclusion is active/valid.
- **End Date**: Indicates the date after which the account alignment exclusion is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account alignment exclusion was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account alignment exclusion and the date/time it was updated.

Account Territory Owner Indicator

The Account Territory Owner Indicator grid displays the accounts owned by the territory or the accounts that the territory is primarily responsible for. Use this grid to identify the primary owner when an account is aligned to more than one territory.

Account Territory Owner Indicator

	Account Name	Account Integration Id	Account Type	Account Specialty	Effective Date	End Date	Created By	Last Modified By
1	Lewis Becker	PROF01	Medical Professional	Allergy	12/6/2021		Adam(HO) Smith, 12/6/2021, 8:43 AM	Adam(HO) Smith, 12/6/2021, 8:43 AM
2	Kelly Hartnett	PROF13	Medical Professional	Radiology	12/6/2021		Adam(HO) Smith, 12/6/2021, 8:43 AM	Adam(HO) Smith, 12/6/2021, 8:43 AM

2 of 2

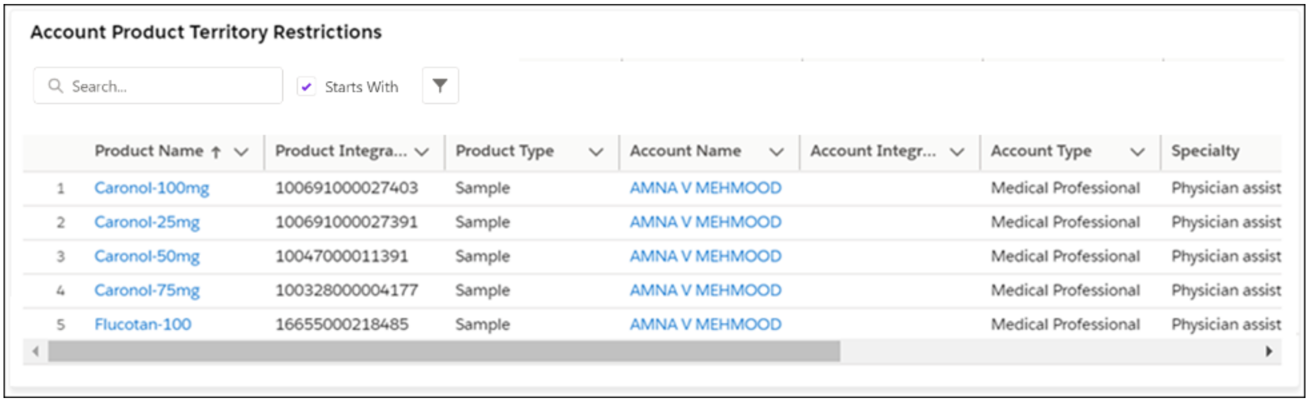
Note: Use the **Search** and **Filters** functions to help you locate the account territory owner(s). See [Search and Filter Functions](#).

When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Area of expertise of the account.
- **Effective Date**: Indicates the date when the account territory owner indicator is active/valid.
- **End Date**: Indicates the date after which the account territory owner indicator is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account territory owner indicator was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account territory owner indicator and the date/time it was updated.

Account Product Territory Restrictions

Account Product Restrictions help manage compliance related restrictions. For example, if a Rep has five products and multiple physician specialties, and one of the products should not be detailed to Pediatricians, this can be managed via Account Product Territory Restrictions.

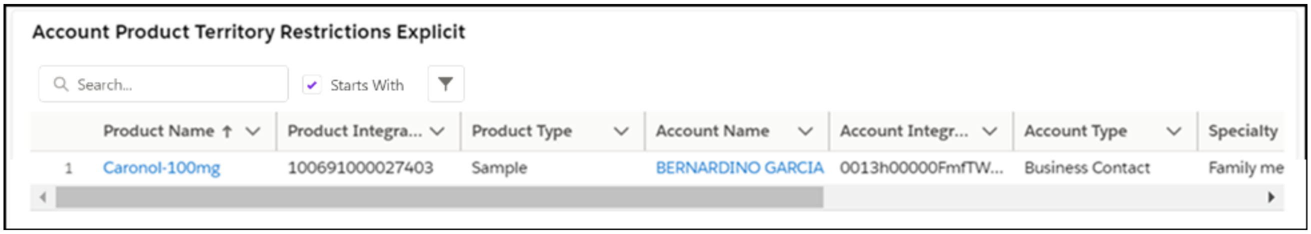


Note: Use the **Search** and **Filters** functions to help you locate account product territory restrictions. See Search and Filter Functions.

When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product.
- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Type of account, such as *Medical Professional*.
- **Specialty**: Area of expertise.
- **Source**: Dynamic or Explicit.
- **Reason**: Lists rules' names involved in the account product territory restriction.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.

Account Product Territory Restrictions Explicit



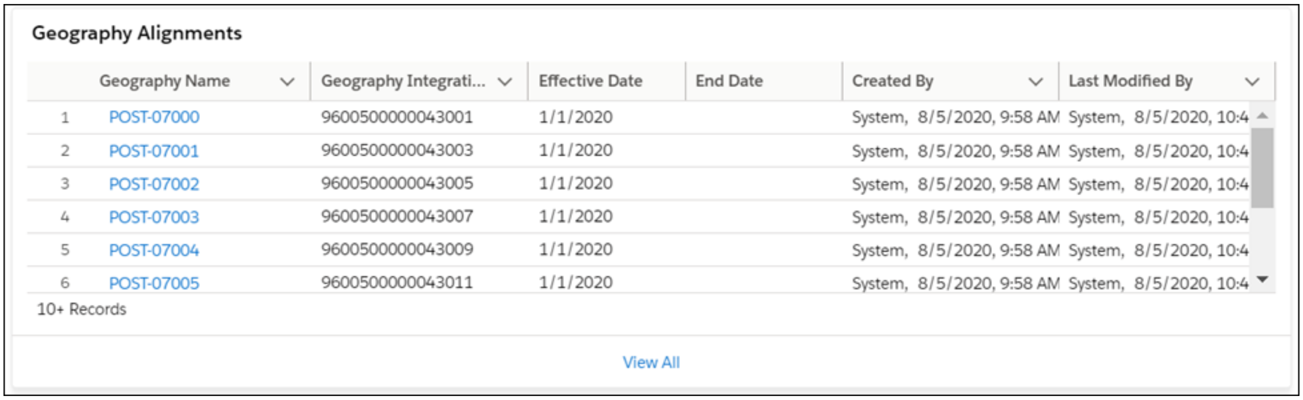
> **Note:** Use the **Search** and **Filters** functions to help you locate account product territory restrictions explicit. See Search and Filter Functions.
>
> When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product.
- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Type of account, such as *Business Contact*.
- **Account Specialty**: Area of expertise.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account and the date/time it was updated.

Territory Geography Alignments Tab

The **Geography Alignments** tab displays the geography alignments for the territory. The data displayed is the current view based on the As Of Date.

Geography Alignments


Geography Alignments

	Geography Name	Geography Integrati...	Effective Date	End Date	Created By	Last Modified By
1	POST-07000	9600500000043001	1/1/2020		System, 8/5/2020, 9:58 AM	System, 8/5/2020, 10:4
2	POST-07001	9600500000043003	1/1/2020		System, 8/5/2020, 9:58 AM	System, 8/5/2020, 10:4
3	POST-07002	9600500000043005	1/1/2020		System, 8/5/2020, 9:58 AM	System, 8/5/2020, 10:4
4	POST-07003	9600500000043007	1/1/2020		System, 8/5/2020, 9:58 AM	System, 8/5/2020, 10:4
5	POST-07004	9600500000043009	1/1/2020		System, 8/5/2020, 9:58 AM	System, 8/5/2020, 10:4
6	POST-07005	9600500000043011	1/1/2020		System, 8/5/2020, 9:58 AM	System, 8/5/2020, 10:4

10+ Records

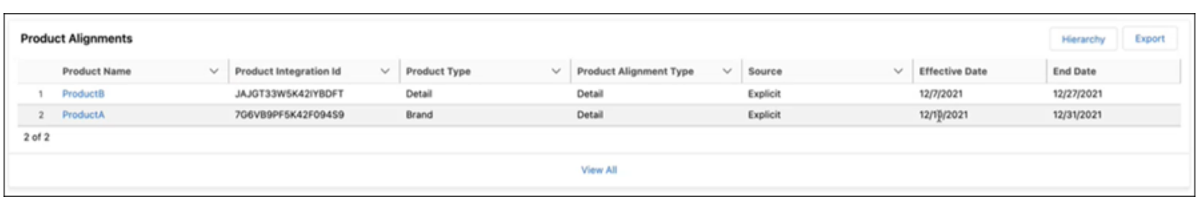
View All

- **Geography Name**: Name of the geography.
- **Geography Integration ID**: Unique geography identification number.
- **Effective Date**: Indicates the date when the geography is active/valid.
- **End Date**: Indicates the date after which the geography is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the geography alignment was created.
- **Last Modified By**: A combination of the user name of the last person to edit the geography alignment and the date/time it was updated.

Territory Product Alignments Tab

The **Product Alignments** tab displays the product alignments (at the sales force and territory level), product alignments exclusions, and product alignment explicits for the territory. The data displayed is the current view based on the As Of Date.

Product Alignments


Product Alignments

Hierarchy Export

	Product Name	Product Integration Id	Product Type	Product Alignment Type	Source	Effective Date	End Date
1	ProductB	JAJGT33W5K42IYBDFT	Detail	Detail	Explicit	12/7/2021	12/27/2021
2	ProductA	7G6VB9PF5K42F094S9	Brand	Detail	Explicit	12/1[illegible]/2021	12/31/2021

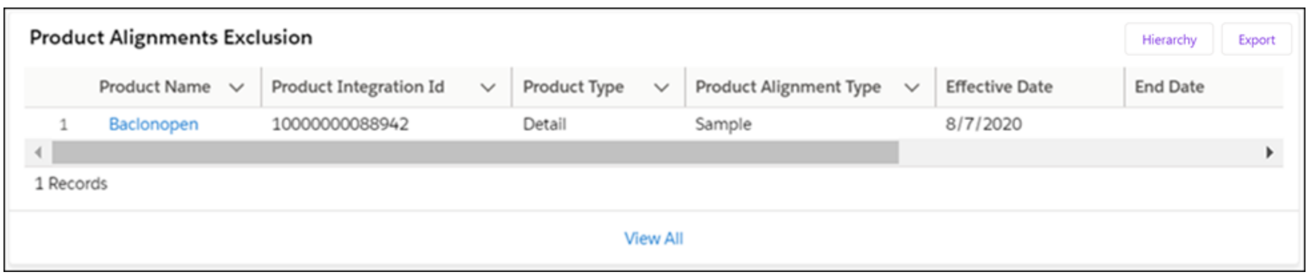
2 of 2

View All

- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.

- **Product Type**: The type of product.
- **Product Alignment Type**: The purpose for the product alignment. For example, *Detail*, *Sales*, etc.
- **Source**: *Dynamic* (alignment generated from the sales force level and inherited by the territory) or *Explicit* (alignment is explicit for the territory).
- **Effective Date**: Indicates the date when the product alignment is active/valid.
- **End Date**: Indicates the date after which the product alignment is no longer active/valid.
- **Hierarchy**: Click to view a pop-up of a hierarchical chart view of aligned products. For more information on reading the hierarchical chart, see Product Hierarchy Tab.
- **Export**: Click to export product alignments into a file.

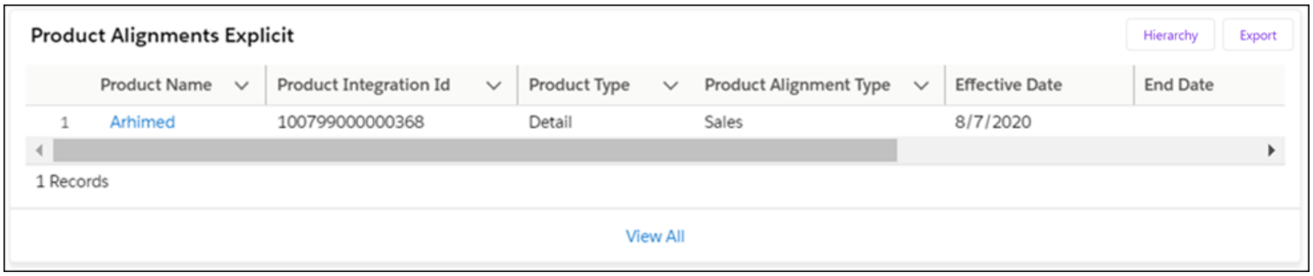
Product Alignments Exclusion



- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product.
- **Product Alignment Type**: The purpose for the product alignment exclusion. For example, Detail, Sales, etc.
- **Effective Date**: Indicates the date when the product alignment exclusion is active/valid.
- **End Date**: Indicates the date after which the product alignment exclusion is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the product alignment exclusion was added to the system.

- **Last Modified By**: A combination of the user name of the last person to edit the product alignment exclusion and the date/time it was updated.
- **Hierarchy**: Click to view a pop-up of a hierarchical chart view of aligned products. For more information on reading the hierarchical chart, see Product Hierarchy Tab.
- **Export**: Click to export product alignments into a file.

Product Alignments Explicit



- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product.
- **Product Alignment Type**: The purpose for the explicit product alignment. For example, Detail, Sales, etc.
- **Effective Date**: Indicates the date when the explicit product alignment is active/valid.
- **End Date**: Indicates the date after which the explicit product alignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the explicit product alignment was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the explicit product alignment and the date/time it was updated.
- **Hierarchy**: Click to view a pop-up of a hierarchical chart view of aligned products. For more information on reading the hierarchical chart, see Product Hierarchy Tab.
- **Export**: Click to export product alignments into a file.

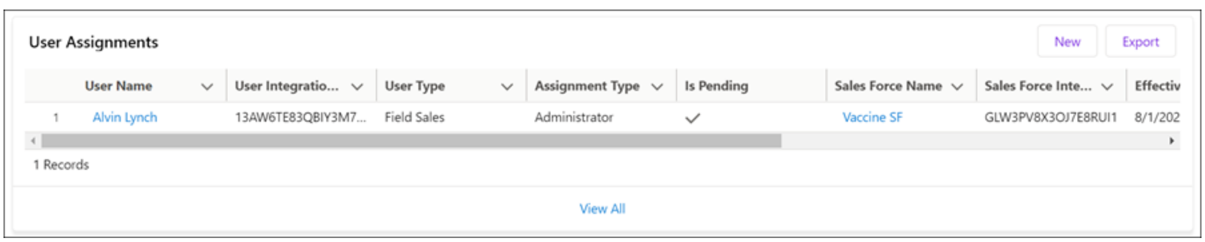
Territory Details History-Time Tab

The **Details History-Time** tab displays the same information as the **Details** tab, except it shows all past, current, and future views of territory details. This tab also displays the audit history of key fields.

Field History

- **Date**: The date and time the field was modified.
- **Field**: The name of the field that was modified.
- **Full Name**: The user name of the person who modified the field.
- **Old Value**: The previous value of the field.
- **New Value**: The current value of the field.
- **Scenario Name**: The scenario associated with the field modification.
- **Scenario Integration Id**: The scenario integration identification number associated with the field modification.

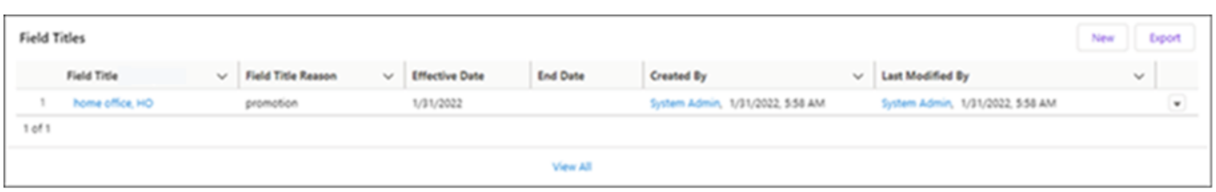
User Assignments



For a description of the fields displayed in the **User Assignments** section, see **User Assignments** in the Territory Details Tab.

Field Titles

> **Note:** This section displays only if the administrator has set the **Field Title Validation** parameter to *User-Territory*.



For a description of the fields displayed in the **Field Titles** section, see Territory Details Tab.

Territory Parents

Territory Parents

	Territory Name	Territory Integration Id	User Name	User Integration Id	Effective Date	End Date
1	North East - Diabetes Sales	10000000148439	Kirby Seif	10000000620025	1/1/2020	

1 Records

View All

For a description of the fields displayed in the **Territory Parents** section, see **Territory Parents** in the Territory Details Tab.

Territory Children

Territory Children

	Territory Name	Territory Integration Id	User Name	User Integration Id	Effective Date	End Date
1	Connecticut - Diabetes Sales	100690000010596	Kirby Seif	10000000620025	1/1/2020	
2	Delaware - Diabetes Sales	100690000013295	Alisun Olohan	10000000620293	1/1/2020	
3	Maine - Diabetes Sales	100690000013205	Tarah Kenelin	10000000620227	1/1/2020	
4	Massachusetts - Diabetes Sale	100690000013265	Taffy D'Elia	10000000620159	1/1/2020	
5	New Jersey - Diabetes Sales	100690000013235	Kirby Seif	10000000620025	1/1/2020	

5 Records

View All

For a description of the fields displayed in the **Territory Children** section, see **Territory Children** in the Territory Details Tab.

Sales Forces

Sales Forces

	Sales Force Name	Sales Force Integration Id	Sales Force Type	Effective Date	End Date	Created By
1	Diabetes Sales	10000000087424	Retail	1/1/2020		System, 11/6/2020,

1 Records

View All

- **Sales Force Name**: Name of the sales force.
- **Sales Force Integration ID**: Unique sales force identification number.

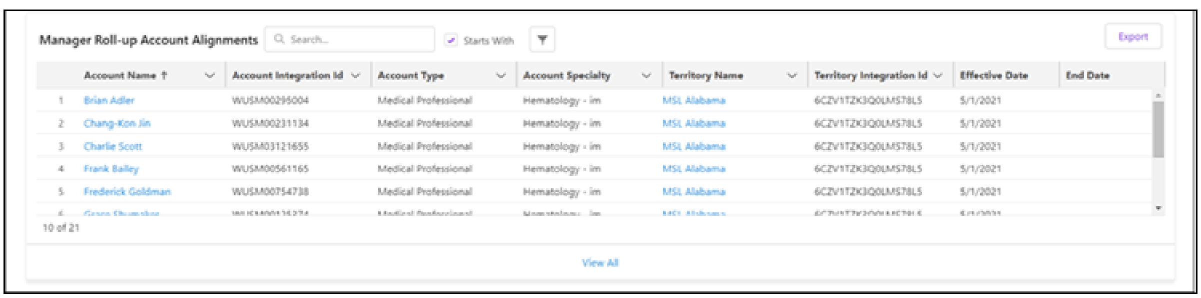
- **Sales Force Type**: The type of sales force.
- **Effective Date**: Indicates the date when the sales force is active/valid.
- **End Date**: Indicates the date after which the sales force is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the sales force was created.
- **Last Modified By**: A combination of the user name of the last person to edit the sales force and the date/time it was updated.

Territory Alignments History-Time Tab

The **Alignments History-Time** tab displays the same information as the **Account Alignments** tab, except it shows all past, current, and future views of alignment details. This tab shows information for both active and inactive accounts.

The **Product Alignments**, **Product Alignments Explicit**, and **Product Alignments Exclusion** sections include a **Hierarchy** button that, when clicked, shows a hierarchical chart view of aligned products. You can use the **Export** button to export aligned products into a file.

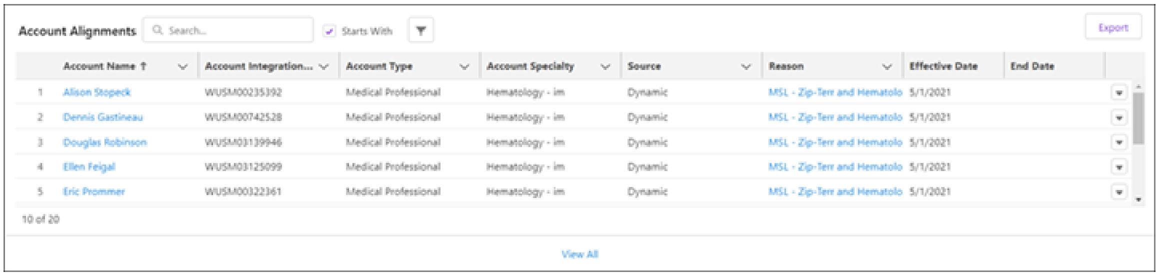
Manager Roll-up Account Alignments



> **Note:** Use the **Search** and **Filters** functions to help you locate account alignments. See Search and Filter Functions.

For a description of the fields displayed in the **Manager Roll-up Account Alignments** section, see **Manager Roll-up Account Alignments** in the Territory Account Alignments Tab.

Account Alignments



Account Alignments   Search...   Starts With   Export

	Account Name	Account Integration...	Account Type	Account Specialty	Source	Reason	Effective Date	End Date
1	Alison Stopeck	WUSM00235392	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	
2	Dennis Gastineau	WUSM00742528	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	
3	Douglas Robinson	WUSM03139946	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	
4	Ellen Feigal	WUSM03125099	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	
5	Eric Prommer	WUSM00322361	Medical Professional	Hematology - im	Dynamic	MSL - Zip-Terr and Hematolo	5/1/2021	

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View All

Note: Use the **Search** and **Filters** functions to help you find specific account alignments. See Search and Filter Functions.

When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

For a description of the fields displayed in the **Account Alignments** section, see **Account Alignments** in the Territory Account Alignments Tab.

Account Alignments Explicit

Account Alignments Explicit   Export

Search...   Starts With

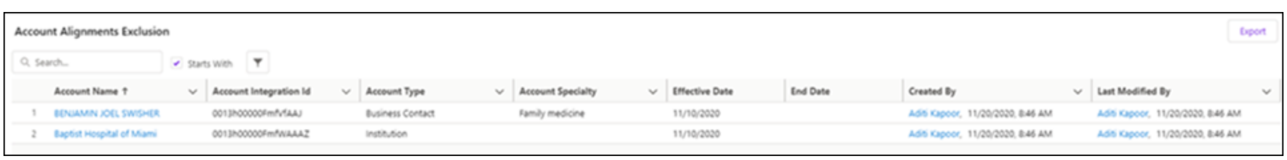
	Account Name	Account Integration Id	Account Type	Account Specialty	Effective Date	End Date	Created By	Last Modified By
1	BENJAMIN JOEL SWISHER	0013h00000FmfVfAAJ	Business Contact	Family medicine	11/10/2020		Aditi Kapoor, 11/20/2020, 8:46 AM	Aditi Kapoor, 11/20/2020, 8:46 AM
2	Baptist Hospital of Miami	0013h00000FmfWAAAZ	Institution		11/10/2020		Aditi Kapoor, 11/20/2020, 8:46 AM	Aditi Kapoor, 11/20/2020, 8:46 AM

Note: Use the **Search** and **Filters** functions to help you locate account alignments explicit. See Search and Filter Functions.

When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

For a description of the fields displayed in the **Account Alignments Explicit** section, see **Account Alignments Explicit** in the Territory Account Alignments Tab.

Account Alignments Exclusion



Account Alignments Exclusion   Export

Search...   Starts With

	Account Name	Account Integration Id	Account Type	Account Specialty	Effective Date	End Date	Created By	Last Modified By
1	BENJAMIN JOEL SWISHER	0013h00000FmfVfAAJ	Business Contact	Family medicine	11/10/2020		Aditi Kapoor, 11/20/2020, 8:46 AM	Aditi Kapoor, 11/20/2020, 8:46 AM
2	Baptist Hospital of Miami	0013h00000FmfWAAAZ	Institution		11/10/2020		Aditi Kapoor, 11/20/2020, 8:46 AM	Aditi Kapoor, 11/20/2020, 8:46 AM

> **Note:** Use the **Search** and **Filters** functions to help you locate account alignments exclusion. See Search and Filter Functions.
>
> When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

For a description of the fields displayed in the **Account Alignments Exclusion** section, see **Account Alignments Exclusion** in the Territory Account Alignments Tab.

Account Territory Owner Indicator

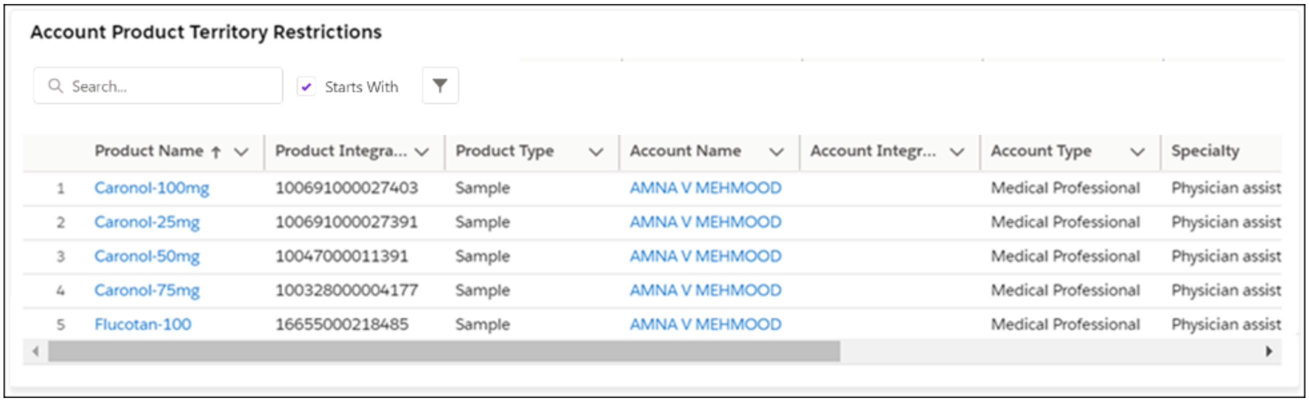
The Account Territory Owner Indicator grid displays the accounts the territory owns.

> **Note:** This grid displays only if you have Account Owner Indicator permissions. Contact your system administrator for more information.

> **Note:** Use the **Search** and **Filters** functions to help you locate the account territory owner(s). See Search and Filter Functions.
>
> When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

For a description of the fields displayed in the **Account Territory Owner Indicator** section, see Territory Account Alignments Tab.

Account Product Territory Restrictions



Account Product Territory Restrictions

Search... | Starts With

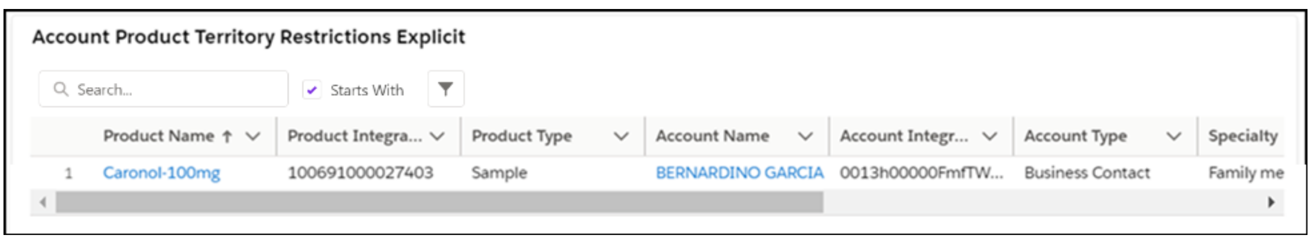
	Product Name	Product Integra...	Product Type	Account Name	Account Integr...	Account Type	Specialty
1	Caronol-100mg	100691000027403	Sample	AMNA V MEHMOOD		Medical Professional	Physician assist
2	Caronol-25mg	100691000027391	Sample	AMNA V MEHMOOD		Medical Professional	Physician assist
3	Caronol-50mg	10047000011391	Sample	AMNA V MEHMOOD		Medical Professional	Physician assist
4	Caronol-75mg	100328000004177	Sample	AMNA V MEHMOOD		Medical Professional	Physician assist
5	Flucotan-100	16655000218485	Sample	AMNA V MEHMOOD		Medical Professional	Physician assist

Note: Use the **Search** and **Filters** functions to help you locate account product territory restrictions. See Search and Filter Functions.

When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

For a description of the fields displayed in the **Account Product Territory Restrictions** section, see **Account Product Territory Restrictions** in the Territory Account Alignments Tab.

Account Product Territory Restrictions Explicit



Account Product Territory Restrictions Explicit

Search... | Starts With

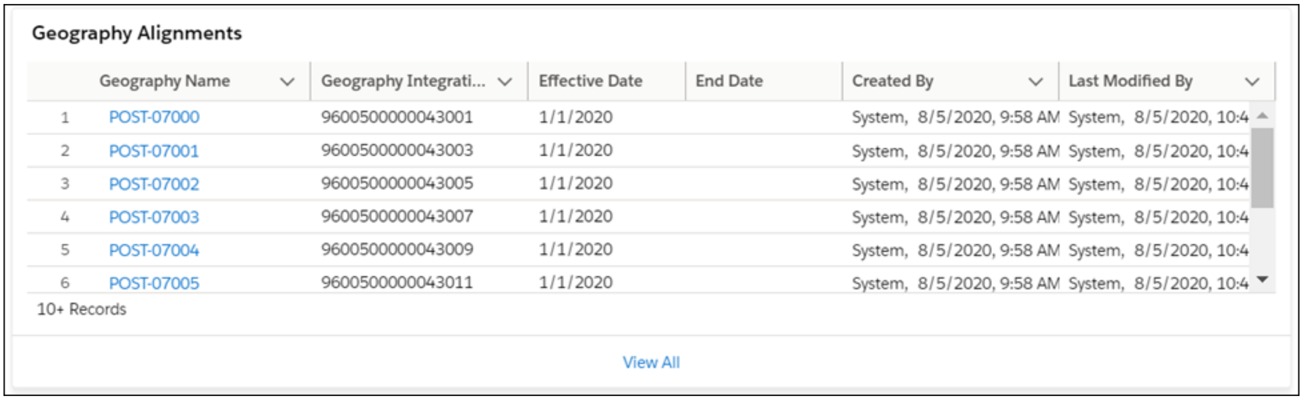
	Product Name	Product Integra...	Product Type	Account Name	Account Integr...	Account Type	Specialty
1	Caronol-100mg	100691000027403	Sample	BERNARDINO GARCIA	0013h00000FmfTW...	Business Contact	Family me

Note: Use the **Search** and **Filters** functions to help you locate account product territory restrictions explicit. See Search and Filter Functions.

When searching for *Pediatric* as Account Specialty, use a more specific search string, such as *Pediatric endocrinology*, to obtain successful search results.

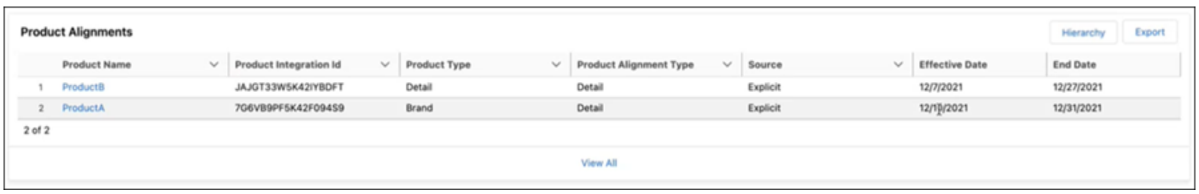
For a description of the fields displayed in the **Account Product Territory Restrictions Explicit** section, see **Account Product Territory Restrictions Explicit** in the Territory Account Alignments Tab.

Geography Alignments



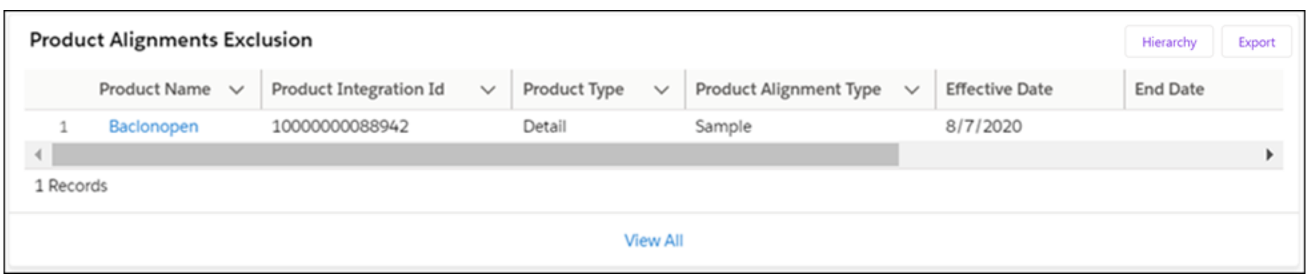
For a description of the fields displayed in the **Geography Alignments** section, see **Geography Alignments** in the Territory Geography Alignments Tab.

Product Alignments



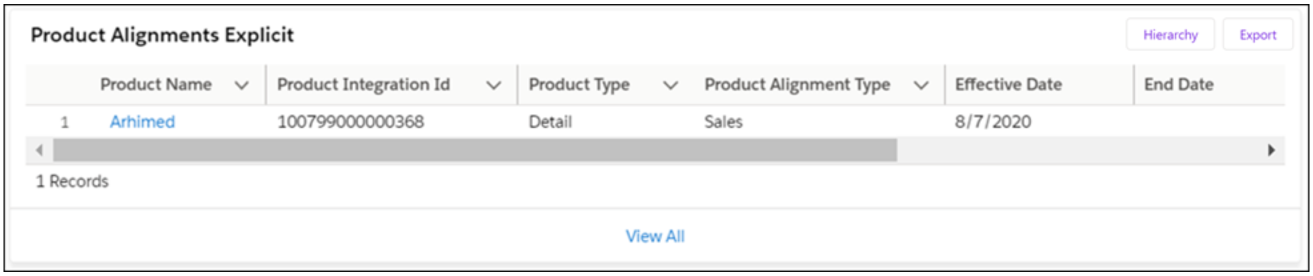
For a description of the fields displayed in the **Product Alignments** section, see **Product Alignments** in the Product Alignments Tab.

Product Alignments Exclusion



For a description of the fields displayed in the **Product Alignments Exclusion** section, see **Product Alignments Exclusion** in the Product Alignments Tab.

Product Alignments Explicit

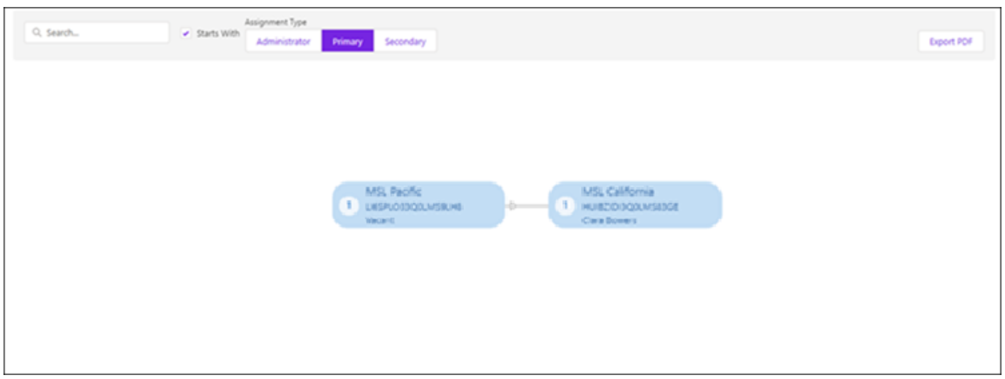


	Product Name	Product Integration Id	Product Type	Product Alignment Type	Effective Date	End Date
1	Arhimed	100799000000368	Detail	Sales	8/7/2020	

For a description of the fields displayed in the **Product Alignments Explicit** section, see **Product Alignments Explicit** in the Product Alignments Tab.

Territory Hierarchy Tab

The **Territory Hierarchy** tab displays the parent-child hierarchy in a pictorial form. The data displayed is based on the **As Of Date** field.



The hierarchy diagram displays the selected territory in the middle. If the territory has parent territories linked to it, they are displayed to the left. If the territory has child territories linked to it, they are displayed to the right.

Each node contains the territory name, integration ID, and user assignments. If the territories have parent and child territories linked to them, the node changes from light blue to dark blue when expanded. The total number of linked parent/child territories are displayed in the node (parent number is on the left and child number is on the right).

To view the details of a territory, click the territory name in the node.

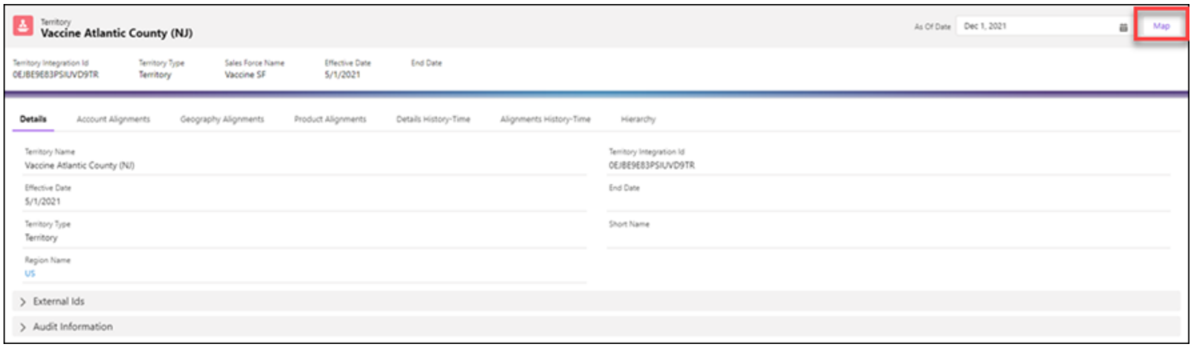
To export hierarchy chart results to a PDF file, click **Export PDF**.

Territory Map View

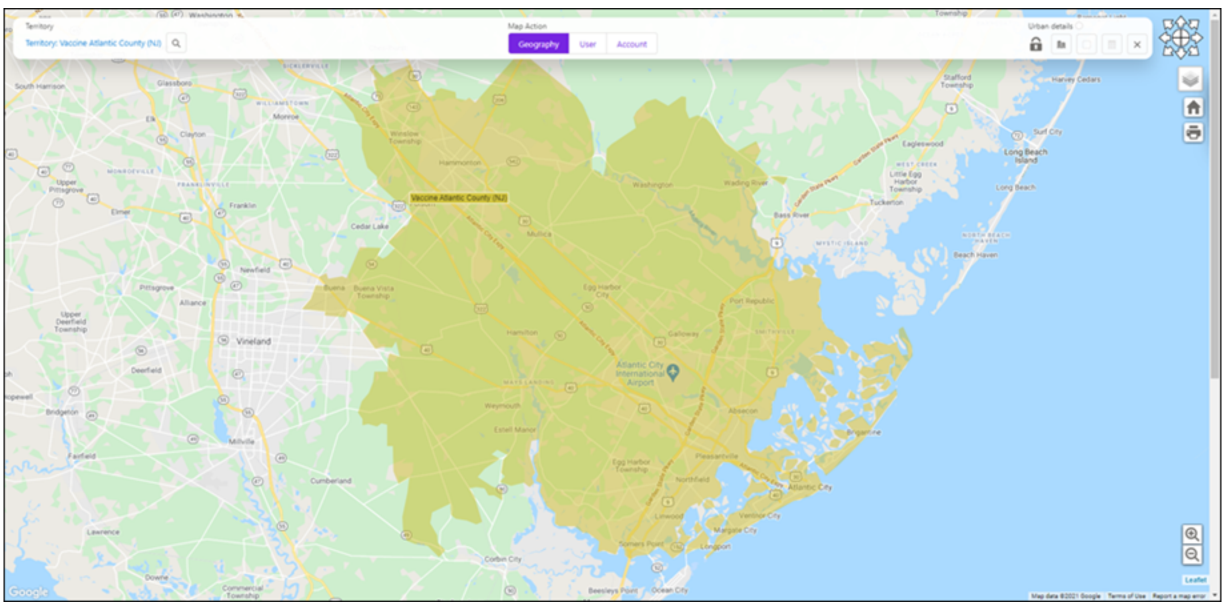
You can view a map for each territory from the **Territories** module. Maps display territories and geographic boundaries, as well as user and account pins, in a map view.

To access Maps from the Territories module

1. From the Territory header, click **Map**.

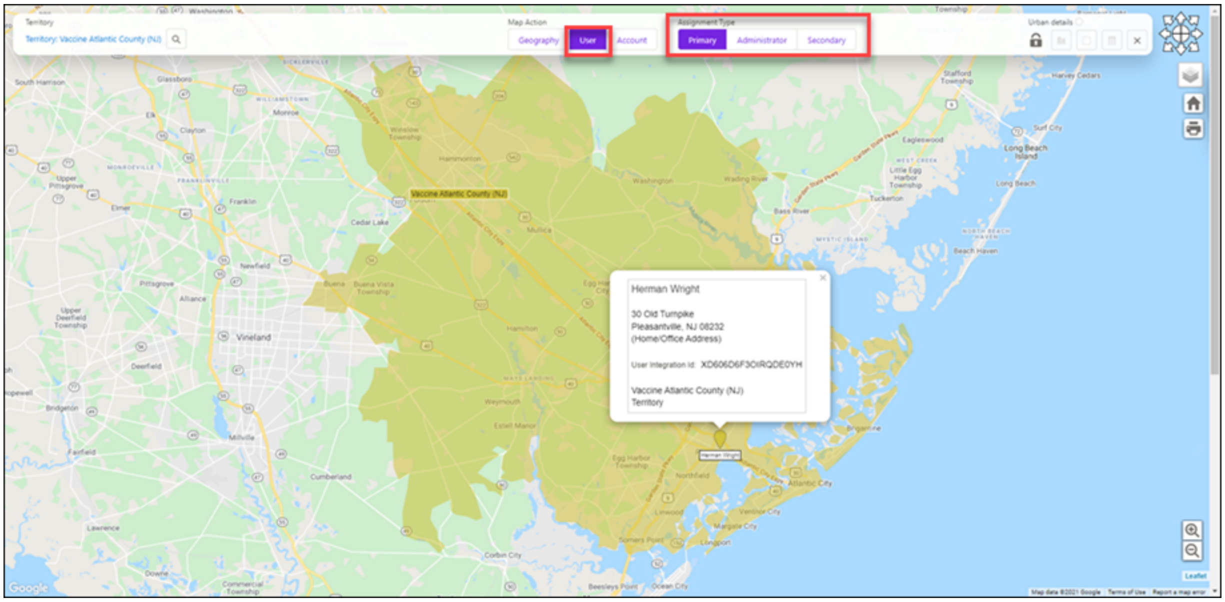


Geography is the default action, which highlights the territory on the country map and includes the territory name.

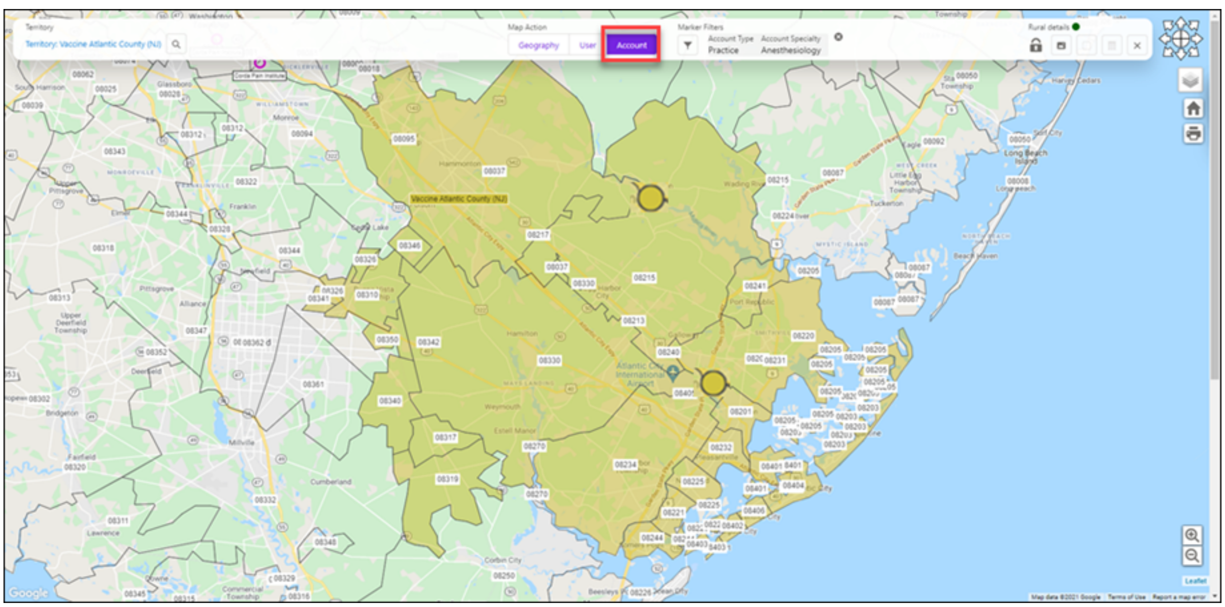


2. Click **User** to view the address of the field user. To view a user with different **Assignment Types**, click **Administrator** or **Secondary**.

> **Note:** Click the user pin to view the field user's address and integration Id.



3. Click **Account** to view accounts within the territory.

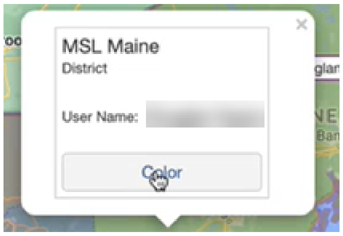


> **Note:** Click the account pin to view the account address.

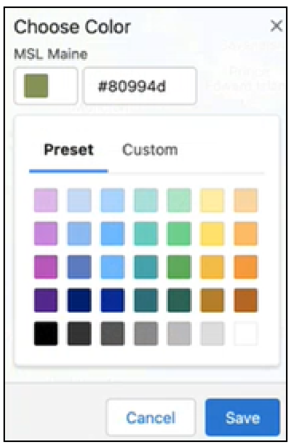
Change territory color

To differentiate between neighboring colors, an HO user can change the color used for specific territories.

1. To change a territory color, click the territory. A **Color** button appears.



2. Click **Color**. A Choose Color window appears.



3. Under **Preset**, select a color or type a hex value in the box to the right. Alternatively, click **Custom**, to use any color, including changing the Hue, Saturation, and Lightness.

4. Click **Save**.

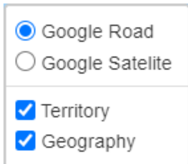
Territory boundaries

Territory boundaries display in different colors for each boundary. For example, district territory view displays each of the child territories in different colors. To view child boundaries, double-click anywhere on the parent territory.

Double-click on the child territory to view the geographies that are aligned to it. You can view child territories to the street level.

Map Buttons

- : Click **Navigation Arrows** to pan the map. You can also click and drag the map to pan to the area you would like to view.
- : Click **Options** to refine the map view.



- : Click **Home** to return to the default view.
- : Click **Print** to print the map view that is visible on the screen.
- : Click **Zoom In** to magnify the map view.
- : Click **Zoom Out** to decrease the magnification of the map view.

Manage Users and Assignments

You can maintain information about all users via the **Users** module. Using this module, you can add, edit, and end date user information. User Territory Assignment can be managed via the **Users** module and **Scenarios** module.

See:

- View User Information
- User Creation
- User's Personal Information
- User Assignments
- User Communications
- User Driver and Vehicle Information
- User Field Titles

View User Information

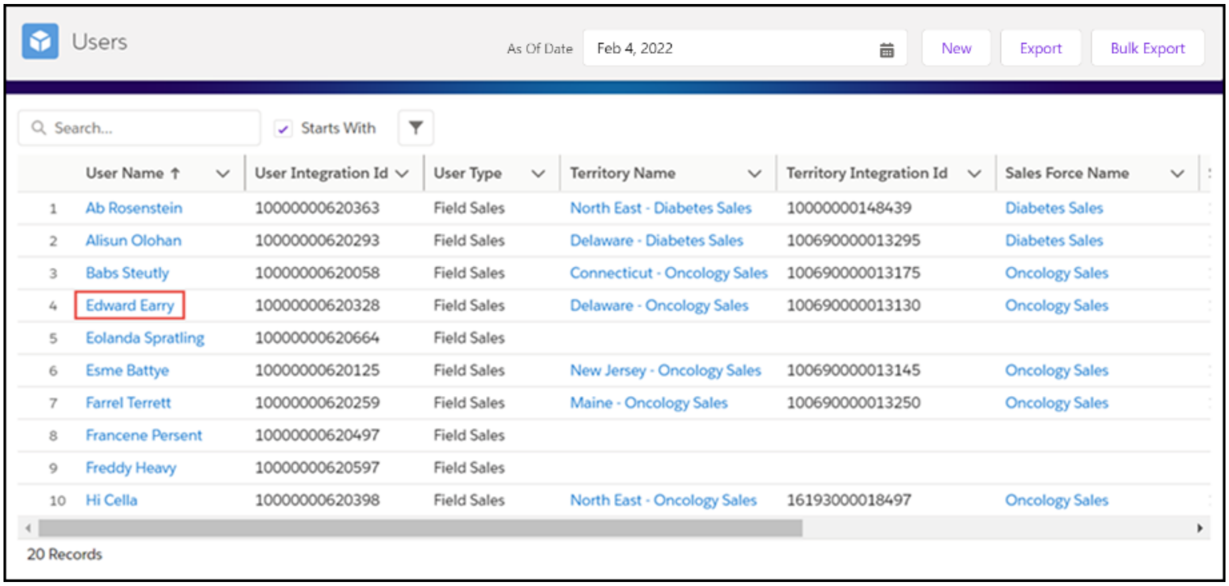
The **Users** module displays profile information for the user, user assignments, user's manager, communications, user's address, audit information, additional information (such as emergency contacts, dependents, and education), fleet information (such as vehicles, drivers, accidents/incidents), the history of changes to users (such as user assignments), and the hierarchical view of the user's reporting structure.

User information listed on the main list page are based on the **As Of Date** field.

To view user information

1. Click **Users** from the primary navigation bar.
2. Select the user whose information you would like to view.

> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



	User Name	User Integration Id	User Type	Territory Name	Territory Integration Id	Sales Force Name
1	Ab Rosenstein	10000000620363	Field Sales	North East - Diabetes Sales	10000000148439	Diabetes Sales
2	Alisun Olohan	10000000620293	Field Sales	Delaware - Diabetes Sales	100690000013295	Diabetes Sales
3	Babs Steutly	10000000620058	Field Sales	Connecticut - Oncology Sales	100690000013175	Oncology Sales
4	Edward Earry	10000000620328	Field Sales	Delaware - Oncology Sales	100690000013130	Oncology Sales
5	Eolanda Spratling	10000000620664	Field Sales			
6	Esme Battye	10000000620125	Field Sales	New Jersey - Oncology Sales	100690000013145	Oncology Sales
7	Farrel Terrett	10000000620259	Field Sales	Maine - Oncology Sales	100690000013250	Oncology Sales
8	Francene Persent	10000000620497	Field Sales			
9	Freddy Heavy	10000000620597	Field Sales			
10	Hi Cella	10000000620398	Field Sales	North East - Oncology Sales	16193000018497	Oncology Sales

3. View the user's information.

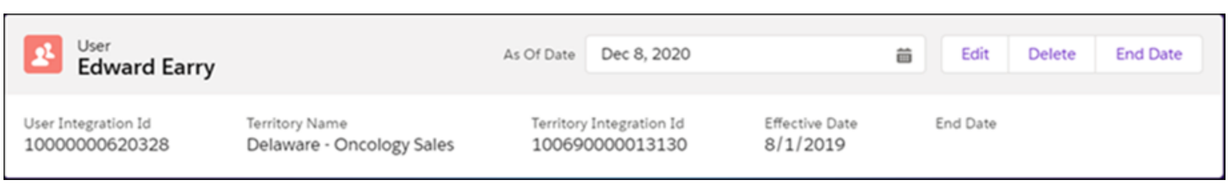
   The User Name, As Of Date, actions available for the User entity, and the User highlight section are displayed on the top of the User entity page for all the User tabs.

   As Of Date and Actions

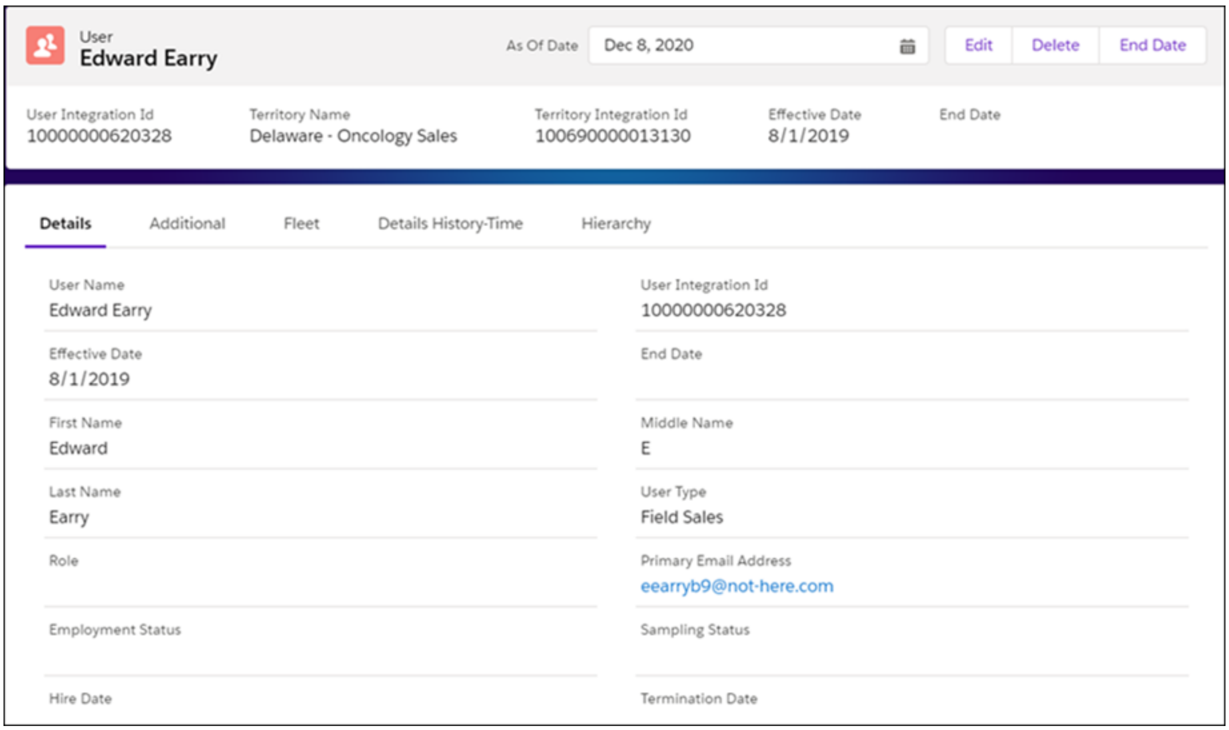
   

   - **As Of Date**: The data displayed for the user is based on the date selected in this field.
   - **Edit**: If applicable, click to make modifications to the user information.
   - **Delete**: If applicable, click to remove user from system.
   - **End Date**: If applicable, click to end date a user's profile, so the user is no longer active/valid as of this date.

   Highlight Section

- **User Name**: Name of the user.
- **User Integration ID**: Unique user identification number.
- **Territory Name**: The name of the territory the user is assigned to as a primary assignment.
- **Territory Integration ID**: Unique territory identification number of the territory that the user is assigned to.
- **Effective Date**: Indicates the date when the user is active/valid.
- **End Date**: Indicates the date after which the user is no longer active/valid.



For details regarding the information displayed in each tab of the User screen, see:

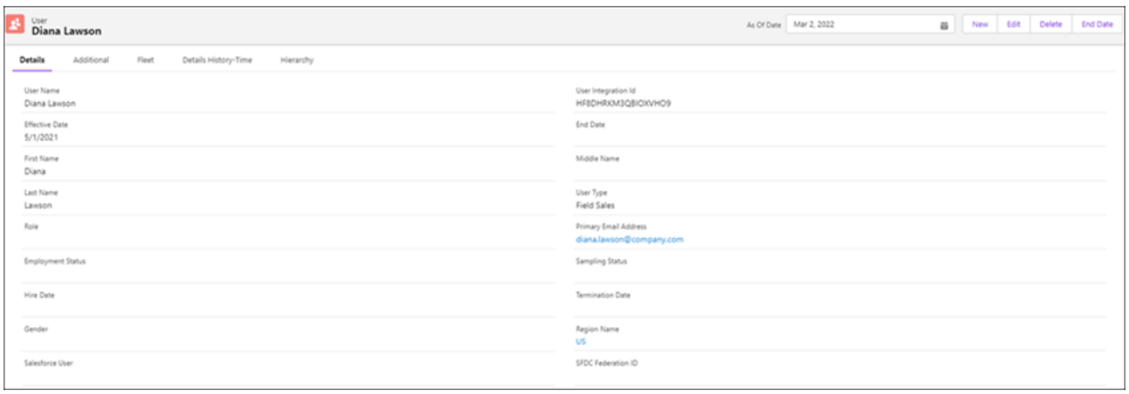
- User Details Tab
- User Additional Tab
- User Fleet Tab

- User Details History-Time Tab
- User Hierarchy Tab

User Details Tab

The **Details** tab contains profile information about the user, user assignments, user's manager information, communications, user's address, and audit information. The data displayed is the current view based on the As Of Date.

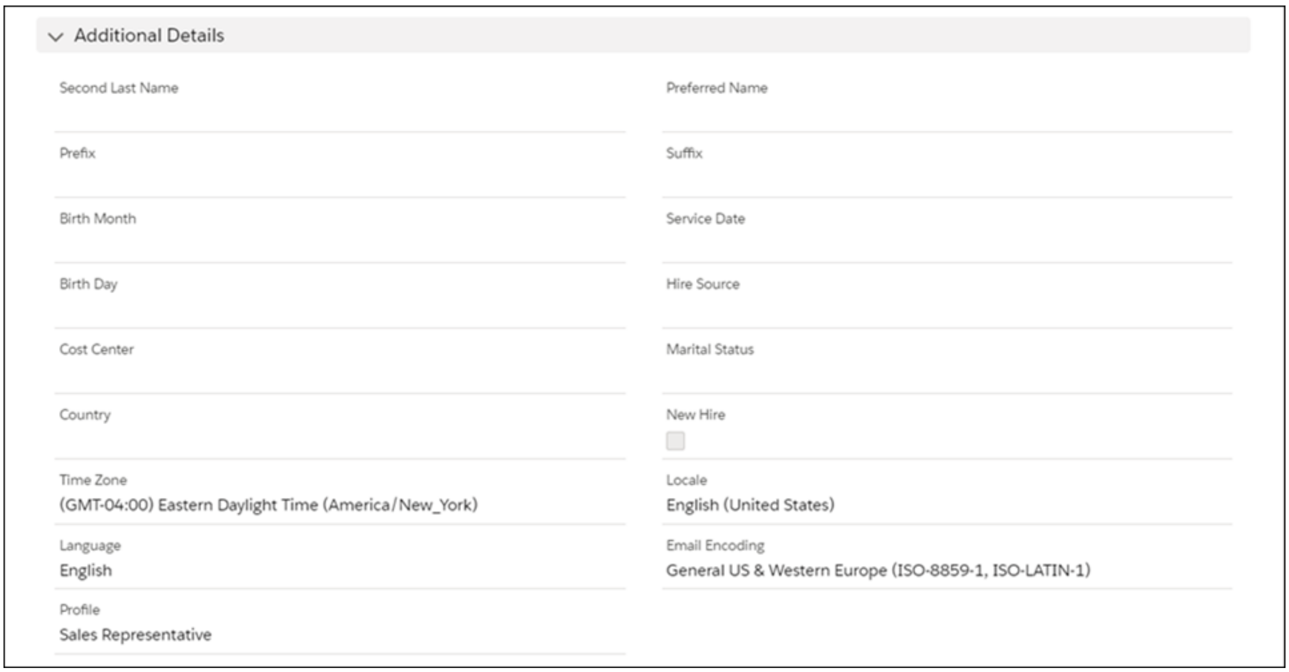
General Information



- **User Name**: Name of the user, concatenated First Name + Last Name.
- **User Integration ID**: Unique user identification number.
- **Effective Date**: Indicates the date when the user is active/valid.
- **End Date**: Indicates the date after which the user is no longer active/valid.
- **First Name**: User's first name.
- **Middle Name**: User's middle name or initial.
- **Last Name**: User's last name.
- **User Type**: The user's function in the application, for example, *Home Office* or *Field Sales*.
- **Role**: The user's function in the company, for example, *Sales Representative* or *District Manager.*
- **Primary Email Address**: The primary email address of the user.
- **Employment Status**: Indicates the status of the user, for example, *Active* or *Terminated*.
- **Sampling Status**: Indicates whether the user is authorized to distribute samples.

- **Hire Date**: The date the user was hired.
- **Termination Date**: The date the user was terminated.
- **Gender**: Male or Female.
- **Region**: The region the user is aligned to.
- **Salesforce User**: The login user name if the user has a login for OCE Optimizer or OCE Sales.
- **SFDC Federation ID**: This federation id is automatically populated when single sign on is enabled.

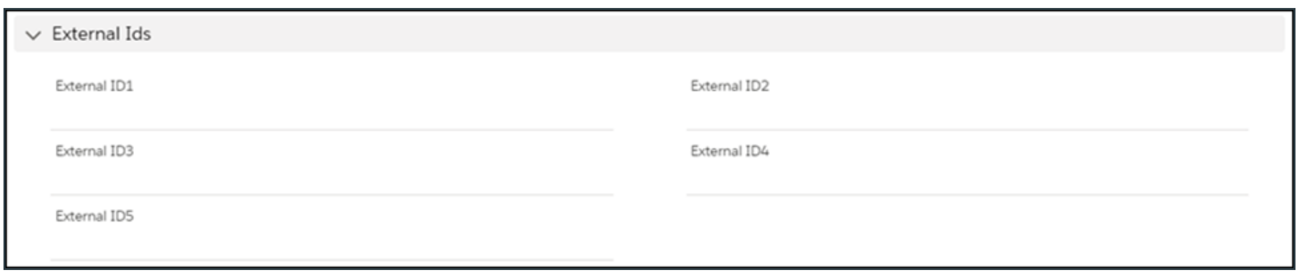
Additional Details



- **Second Last Name**: Mother's maiden name.
- **Preferred Name**: The preferred name of the user.
- **Prefix**: Additional information about the user that comes before the name, such as *Mr.*, *Mrs.*, *Miss*, *Ms.*, or *Dr*.
- **Suffix**: Additional information about the user that comes after the name, such as *educational degree*, *accreditation*, *Jr.*, *Sr.*, *II*, or *III*.
- **Birth Month**: The month of the user's birth.
- **Birth Day**: The day of the user's birth.

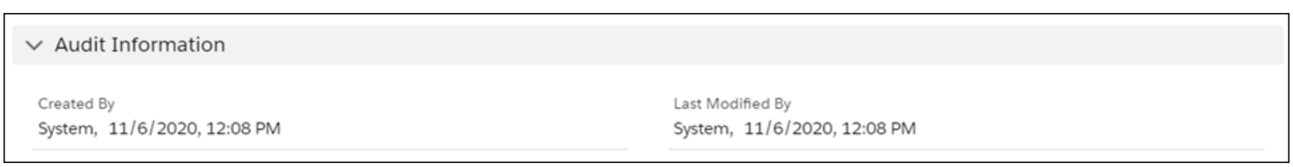
- **Service Date**: The date the user started work at the company.
- **Hire Source**: The source involved in hiring the user.
- **Cost Center**: Cost center to use for the user.
- **Marital Status**: The user's marital status, such as *Married*, *Divorced*, or *Single*.
- **Country**: The country where the user resides.
- **New Hire**: This box is checked if the user is a new hire.
- **Time Zone**: The time zone where the user resides.
- **Locale**: The location of the user, including the main language spoken there.
- **Language**: The main language spoken by the user.
- **Email Encoding**: The email coding for your country.
- **Profile**: The user's function in the company.

External IDs



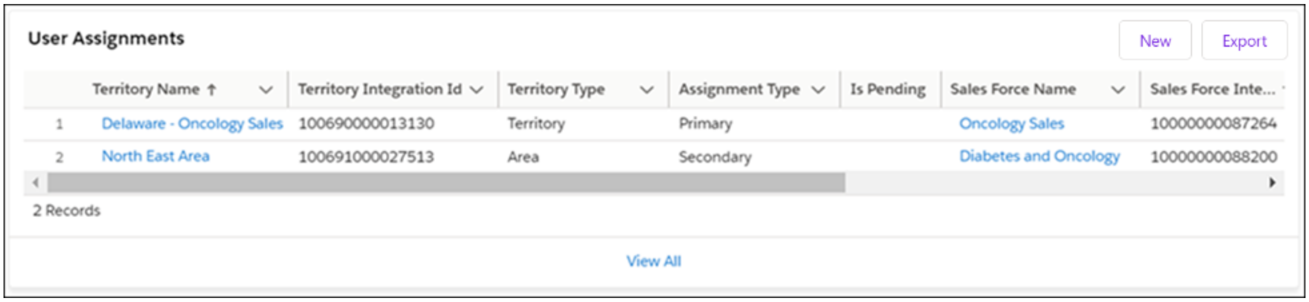
- **External ID1—ID5**: Up to 5 additional identification numbers for cross referencing.

Audit Information



- **Created By**: A combination of the creator's user name and the date/time the user was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the user's information and the date/time it was updated.

User Assignments



- **Territory Name**: The name of the territory the user is assigned to.
- **Territory Integration ID**: Unique territory identification number of the territory the user is assigned to.
- **Territory Type**: The type of territory the user is assigned to, such as, *Territory, District, Region,* or *Business Unit*.
- **Assignment Type**: The assignment type of the user to territory, such as, *Primary, Secondary,* or *Administrator.*
- **Is Pending**: When you create a user assignment outside the scenario, the system creates an internal scenario to process the request. A check mark is displayed in the column while the user assignment is pending and disappears after the scenario is processed.
- **Sales Force Name**: The name of the sales force the territory, and therefore user, is aligned to.
- **Sales Force Integration ID**: Unique sales force identification number.
- **Effective Date**: Indicates the date when the user territory assignment is active/valid.
- **End Date**: Indicates the date after which the user territory assignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the user's territory assignment was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the user's territory assignment information and the date/time it was updated.

Field Titles

Note: Field Title use is parameter-driven and is controlled by the system administrator.

- **Field Title**: Name of the field title assigned to the user.
- **Field Title Reason**: Reason for the field title.
- **Effective Date**: Indicates the date when the field title is active/valid for the user.
- **End Date**: Indicates the date when the field title is no longer active/valid for the user.
- **Created By**: A combination of the creator's user name and the date/time the user's field title was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the user's field title and the date/time it was updated.

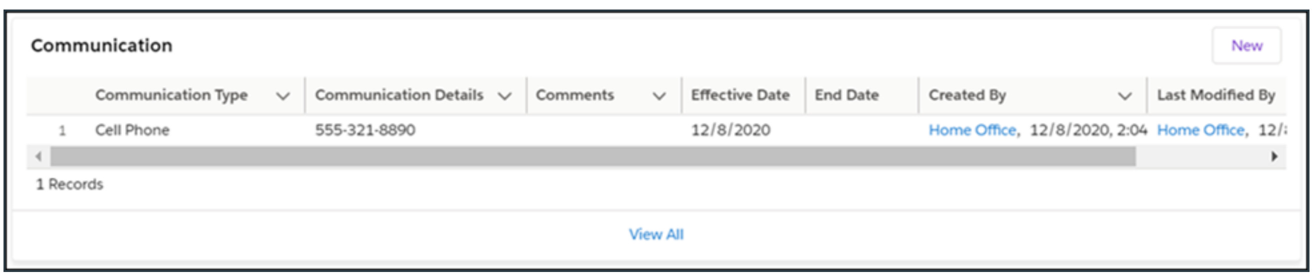
Manager

- **User Name**: The name of the user's manager.
- **User Integration ID**: Unique user identification number of the user’s manager.
- **Territory Name**: The name of the territory the manager is assigned to.
- **Territory Integration ID**: Unique territory identification number of the territory the manager is assigned to.
- **Territory Type**: Type of territory the manager is assigned to, such as *District*, *Area*, or *Business Unit*.
- **Assignment Type**: Type of assignment the manager is assigned to, such as *Primary*, *Secondary*, or *Administrator*.
- **Effective Date**: Indicates the date when the manager is active/valid.
- **End Date**: Indicates the date after which the manager is no longer active/valid.

Manages Directly

- **User Name**: User assigned to the direct territory.
- **User Integration ID**: Unique user identification number of the report.
- **User Assignment Type**: The assignment type of the direct report, such as, *Primary, Secondary,* or *Administrator*.
- **Territory Name**: The name of the direct report territory.
- **Territory Integration ID**: Unique territory identification number of the direct report territory.
- **Territory Type**: Type or hierarchy level of the direct report territory, such as *District*, *Area*, or *Business Unit*.
- **Effective Date**: Indicates the date when the report is active/valid.
- **End Date**: Indicates the date after which the report is no longer active/valid.

Communication



- **Communication Type**: The mode of communication, such as *Home Phone*, *Cell Phone*, *Office Phone*, *Fax Number*, *Pager*, *Voice Mail*, or *Permanent Email*.
- **Communication Details**: Description of the communication.
- **Comments**: Additional information about the communication, such as *home phone number* or *cell phone number*.
- **Effective Date**: Indicates the date when the communication is active/valid.
- **End Date**: Indicates the date after which the communication is no longer active/valid.

- **Created By**: A combination of the creator's user name and the date/time the communication was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the communication and the date/time it was updated.

User Address

User Address

New

	Address Type	Address Line 1	Address Line 2	Address Line 3	City	State	Postal Code
1	Home/Office Address	83 Hutsell St.			Metuchen	NJ	08840
2	Storage Address	97 Grimball St.			Metuchen	NJ	08840
3	Shipping Address	838B Cajon Ave.			Metuchen	NJ	08840
4	Mailing Address	94 Fesner Rd.			Metuchen	NJ	08840

4 Records

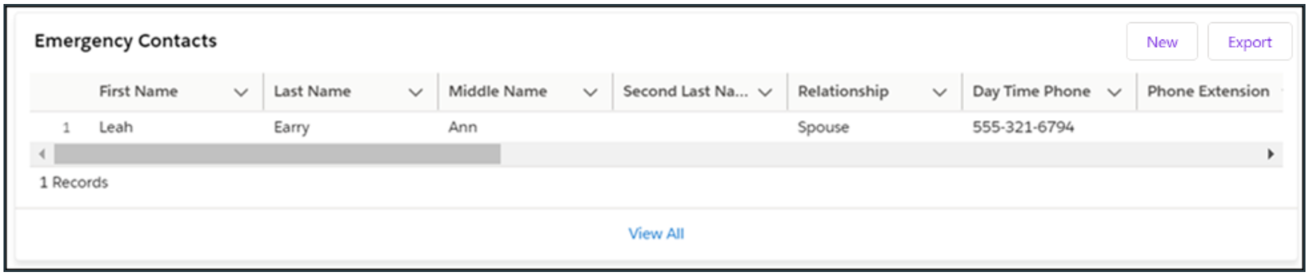
View All

- **Address Type**: Description that classifies the address type, such as *Home*, *Office*, *Mailing*, *Shipping*, or *Storage*.
- **Address Line 1**: The street address of the user.
- **Address Line 2**: Additional address information, if applicable.
- **Address Line 3**: Additional address information, if applicable.
- **City**: The city where the user resides.
- **State**: The state where the user resides.
- **Postal Code**: The postal code of the city where the user resides.
- **Extension**: The delivery route code.
- **Country**: The country where the user resides.
- **Comments**: Additional information, if applicable.
- **Created By**: A combination of the creator's user name and the date/time the address information was created.
- **Last Modified By**: A combination of the user name of the last person to edit the user's address information.

User Additional Tab

The **Additional** tab contains emergency contact information, dependents, and education.

Emergency Contacts



- **First Name**: Emergency contact's first name.
- **Middle Name**: Emergency contact's middle name or initial.
- **Last Name**: Emergency contact's last name.
- **Second Last Name**: Emergency contact's additional last name, if applicable.
- **Relationship**: Emergency contact's relation to the user, such as *Parent*, *Child*, or *Spouse*.
- **Day Time Phone**: Emergency contact's daytime phone number.
- **Phone Extension**: The phone extension of the daytime phone number, if applicable.
- **Evening Time Phone**: Emergency contact's evening phone number.
- **Address Line 1**: The street address of the emergency contact.
- **Address Line 2**: Additional address information, if applicable.
- **Address Line 3**: Additional address information, if applicable.
- **City**: The city where the emergency contact resides.
- **State**: The state where the emergency contact resides.
- **Postal Code**: The postal code of the city where the emergency contact resides.
- **Extension**: The delivery route code.
- **Country**: The country where the emergency contact resides.

- **Created By**: A combination of the creator's user name and the date/time the emergency contact information was created.
- **Last Modified By**: A combination of the user name of the last person to edit the emergency contact information.

Dependents

Dependents

New Export

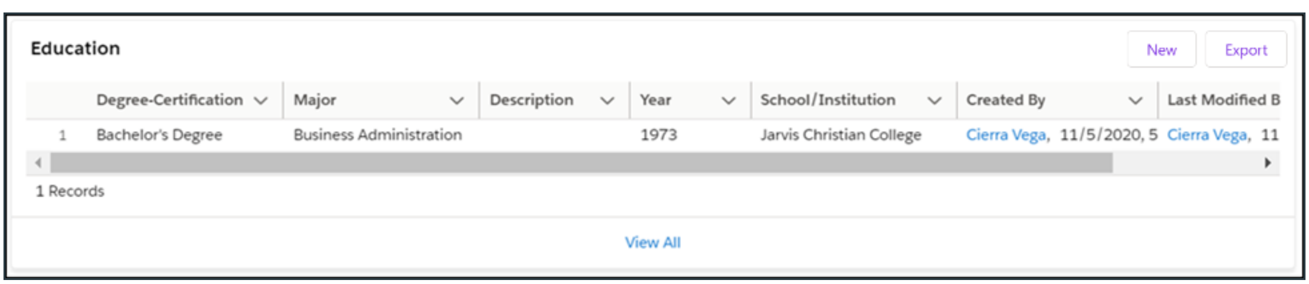
	First Name	Last Name	Middle Name	Relationship	Gender	Birth Date	Created By
1	Rachel	Earry	Erin	Child	Female	8/6/2008	Home Office, 12/8/2020,

1 Records

View All

- **First Name**: Dependent's first name.
- **Middle Name**: Dependent's middle name or initial.
- **Last Name**: Dependent's last name.
- **Relationship**: Dependent's relation to the user, such as *Parent*, *Child*, or *Spouse*.
- **Gender**: *Male* or *Female*.
- **Birth Date**: Dependent's date of birth.
- **Created By**: A combination of the creator's user name and the date/time the dependent's information was created.
- **Last Modified By**: A combination of the user name of the last person to edit the dependent's information.

Education



Education

New Export

	Degree-Certification	Major	Description	Year	School/Institution	Created By	Last Modified B
1	Bachelor's Degree	Business Administration		1973	Jarvis Christian College	Cierra Vega, 11/5/2020, 5	Cierra Vega, 11

1 Records

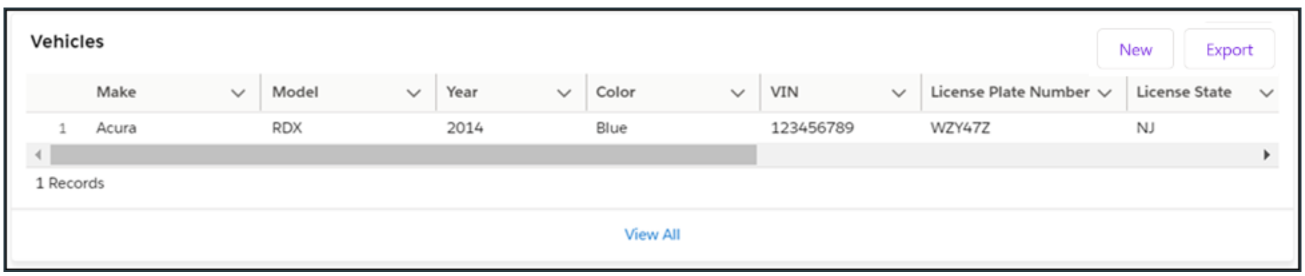
View All

- **Degree-Certification**: Type of degree earned by user, such as B.A., B.S., MBA or PhD.
- **Major**: User's primary field of study.
- **Description**: Details of the user's field of study.
- **Year**: The year in which the user graduated.
- **School/Institution**: The name of the school the user attended.
- **Created By**: A combination of the creator's user name and the date/time the user's educational information was created.
- **Last Modified By**: A combination of the user name of the last person to edit the user's educational information.

User Fleet Tab

The **Fleet** tab contains vehicle, driver, and accident/incident information. The data displayed is the current view based on the As Of Date.

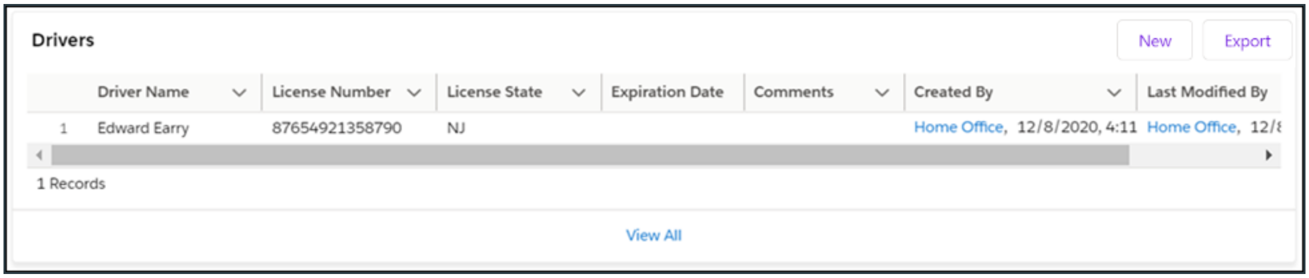
Vehicles



- **Make**: The make of the vehicle.
- **Model**: The model of the vehicle.
- **Year**: The year of the vehicle.
- **Color**: The color of the vehicle.
- **VIN**: The vehicle identification number.
- **License Plate Number**: The license plate number of the vehicle.
- **License State**: The state where the vehicle is registered.
- **License Country**: The country where the vehicle is registered.

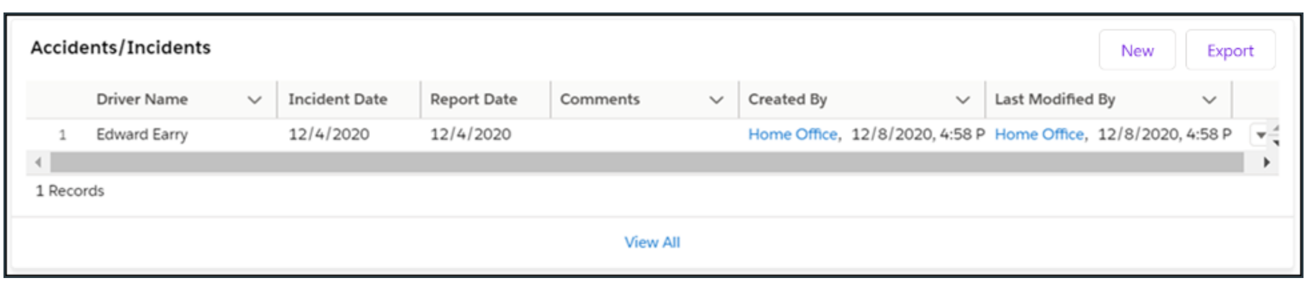
- **Comments**: Additional information, if applicable.
- **Created By**: A combination of the creator's user name and the date/time the vehicle information was created.
- **Last Modified By**: A combination of the user name of the last person to edit the vehicle information.

Drivers



- **Driver Name**: The name of the driver of the vehicle listed.
- **License Number**: The license number of the driver.
- **License State**: The state where the license is registered.
- **Expiration Date**: The expiration date of the license.
- **Comments**: Additional information, if applicable.
- **Created By**: A combination of the creator's user name and the date/time the driver's information was created.
- **Last Modified By**: A combination of the user name of the last person to edit the driver's information.

Accidents/Incidents

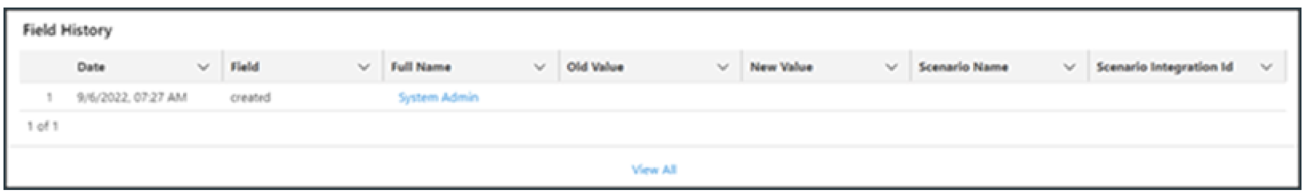


- **Driver Name**: The name of the driver involved in the accident/incident.
- **Incident Date**: The date of the accident/incident.
- **Report Date**: The date the report of the accident/incident was made.
- **Comments**: Information about the accident/incident.
- **Created By**: A combination of the creator's user name and the date/time the accident/incident information was created.
- **Last Modified By**: A combination of the user name of the last person to edit the accident/incident information.

User Details History-Time Tab

The **User Details History-Time** tab displays the same information as the **Details** tab, except it shows all past, current, and future views of user details. This tab also displays the audit history of key fields.

Field History


Field History

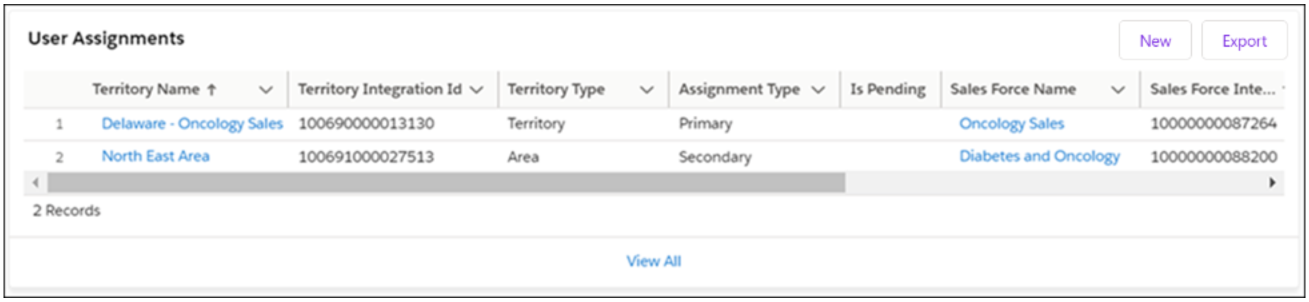
	Date	Field	Full Name	Old Value	New Value	Scenario Name	Scenario Integration Id
1	9/6/2022, 07:27 AM	created	System Admin				

1 of 1

View All

- **Date**: The date and time the change was made.
- **Field**: The name of the field that was modified.
- **Full Name**: The user name of the person who modified the field.
- **Old Value**: The previous value of the field.
- **New Value**: The updated value of the field.
- **Scenario Name**: The scenario associated with the field modification.
- **Scenario Integration Id**: The scenario integration identification number associated with the field modification.

User Assignments



User Assignments

New | Export

	Territory Name	Territory Integration Id	Territory Type	Assignment Type	Is Pending	Sales Force Name	Sales Force Inte...
1	Delaware - Oncology Sales	100690000013130	Territory	Primary		Oncology Sales	10000000087264
2	North East Area	100691000027513	Area	Secondary		Diabetes and Oncology	10000000088200

2 Records

View All

For a description of the fields displayed in the **User Assignments** section, see **User Assignments** in the User Details Tab.

Field Titles

Note: Field Title use is parameter-driven and is controlled by the system administrator.

Field Titles

New | Export

	Field Title	Field Title Reason	Effective Date	End Date	Created By	Last Modified By
1	home office, HO	promotion	1/31/2022		System Admin, 1/31/2022, 5:58 AM	System Admin, 1/31/2022, 5:58 AM

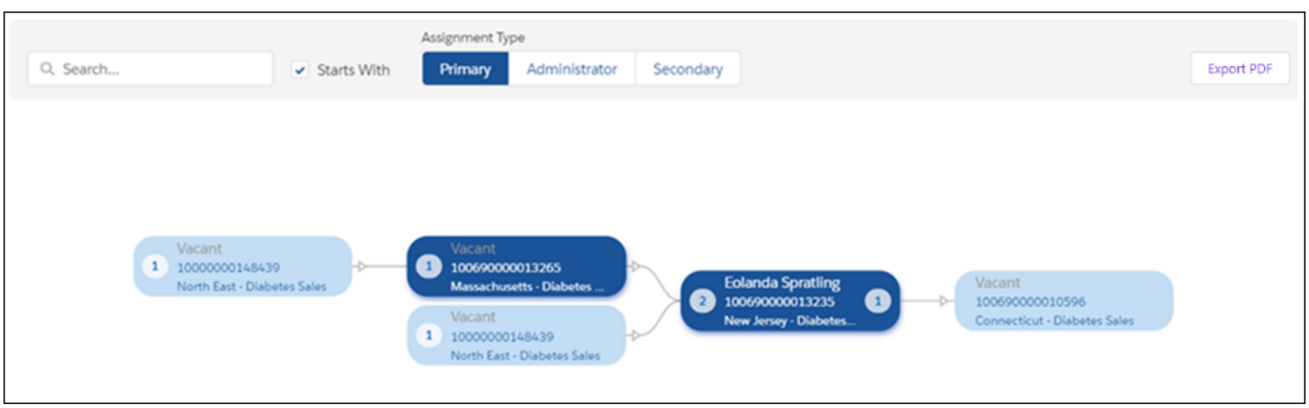
1 of 1

View All

For a description of the fields displayed in the **Field Titles** section, see User Details Tab.

User Hierarchy Tab

The **User Hierarchy** tab displays the parent-child hierarchy in a pictorial form. The data displayed is based on the **As Of Date** field.



Select the **Assignment Type** to view the hierarchical structure for that user assignment type (the user-territory relationship for the selected assignment type). Select **Primary**, **Secondary**, **Administrator**, or other configured assignment type, to view the hierarchical structure.

The hierarchy diagram displays the selected user in the middle. The user's manager is displayed to the left and direct reports are displayed to the right.

Each node contains the user name and integration ID. If the user has a manager or direct reports, the node changes from light blue to dark blue when expanded. The total number of managers and direct reports the user has is displayed in the node (manager number is on the left and the number of direct reports is on the right).

To view the details of a user, manager, or direct reports, click the user's name in the node.

To export hierarchy chart results to a PDF file, click **Export PDF**.

User Creation

Information about all users, working within the company and located either in the field or in the Home Office, can be maintained using the Optimizer application.

See:

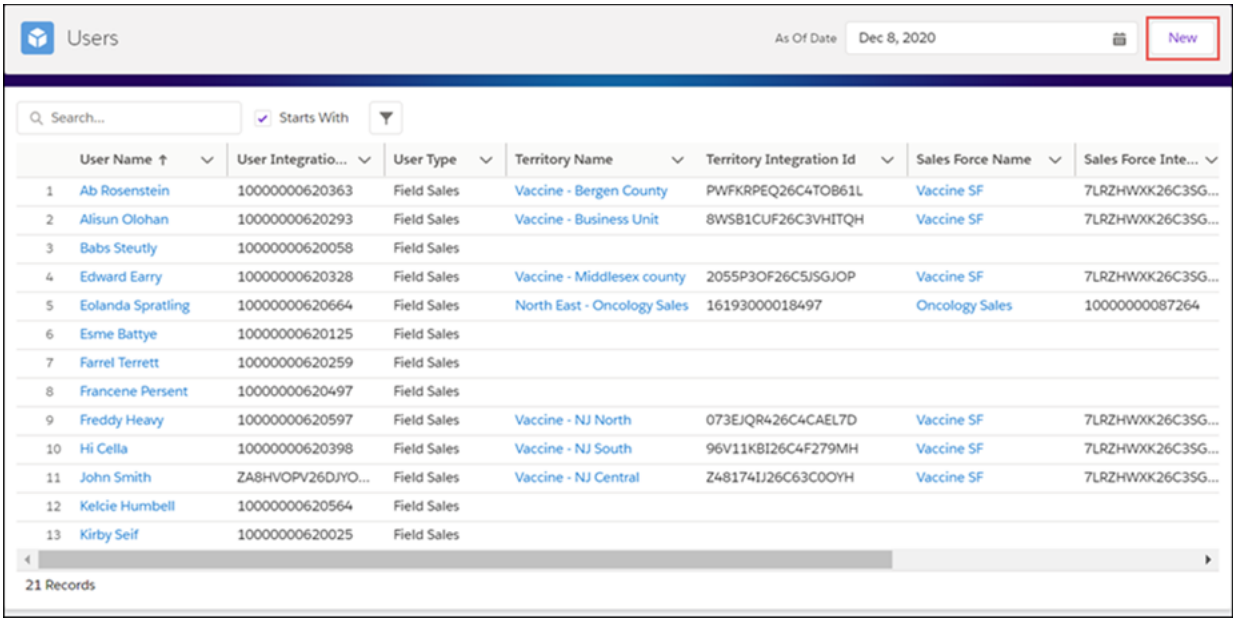
- Add a User
- Modify User Information
- Delete a User
- End Date a User

Add a User

You can add users to the application.

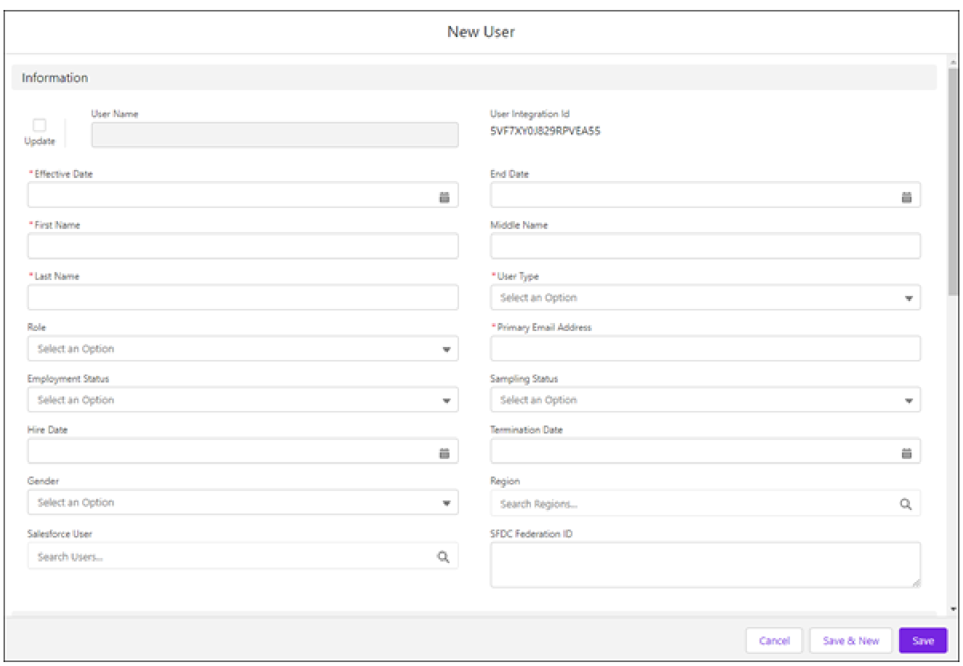
To add a user

1. Click **Users** from the primary navigation bar.
2. From the Users screen, click **New**.



3. Enter user information and click **Save**.

> **Note:** The **User Name** field defaults to the user's first and last name, once entered. To modify the default user name, select **Update**, change the user name in the entry box, then click **Save**.



For information about the fields, see View User Information.

Modify User Information

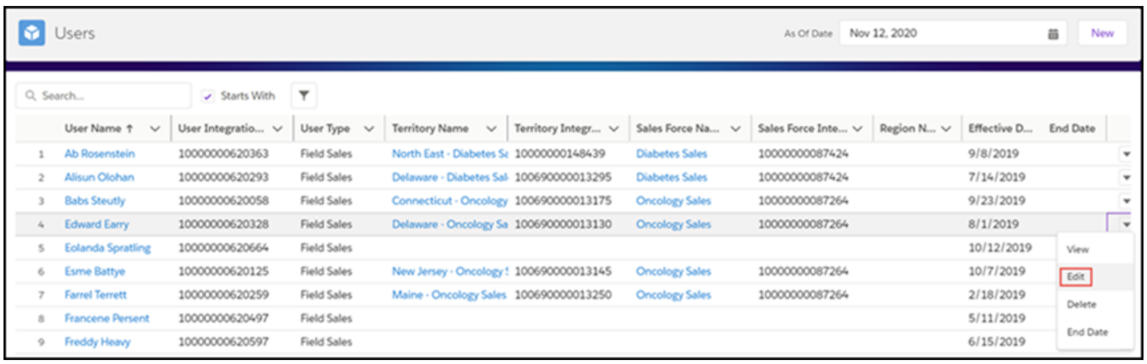
You can edit user information.

To edit a user

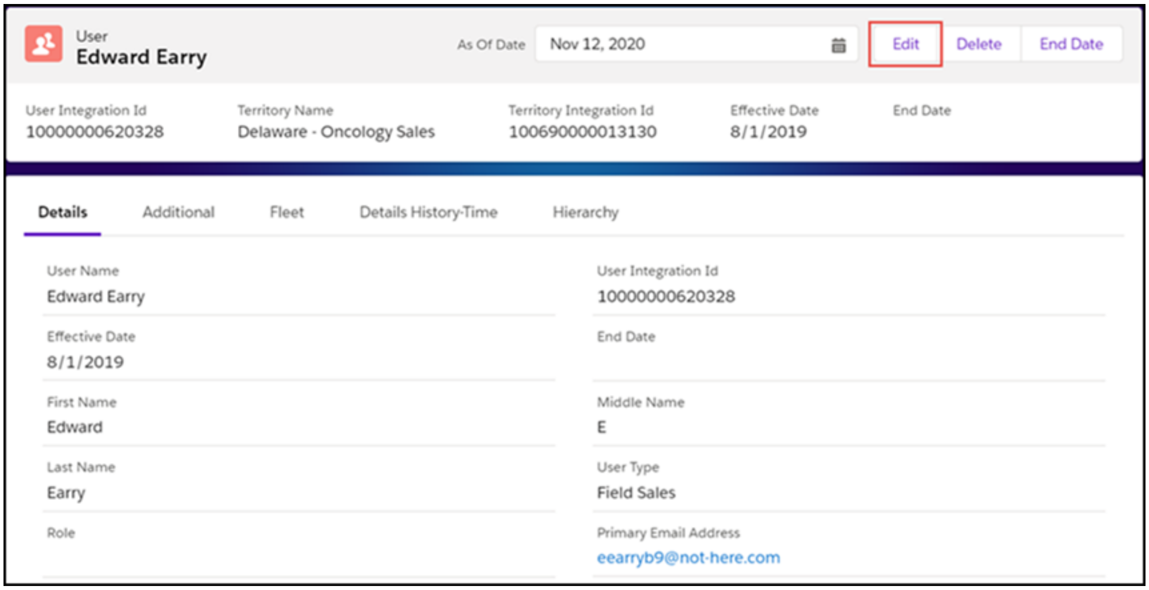
1. Click **Users** from the primary navigation bar.
2. Do one of the following:

> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions].

- Select the drop-down for the user whose information you would like to modify and click **Edit**.

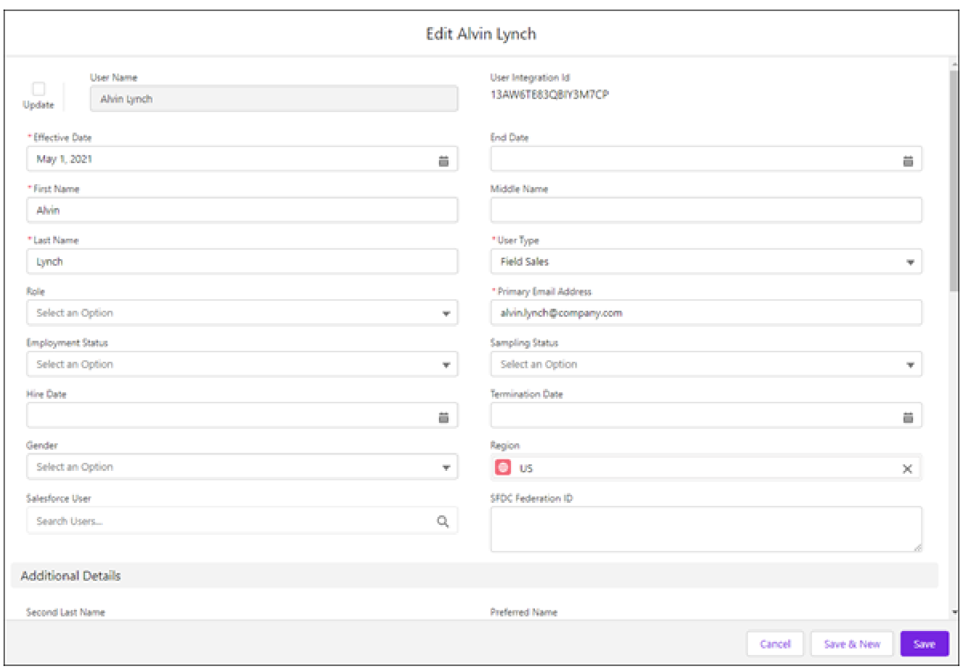


- Click the user's name to go to the user's profile page, then click **Edit**.



3. Modify the user's information and click **Save**.

> **Note:** To modify the user name, select **Update**, edit the user name in the **User Name** entry box, then click **Save**.



For information about the fields, see View User Information.

Delete a User

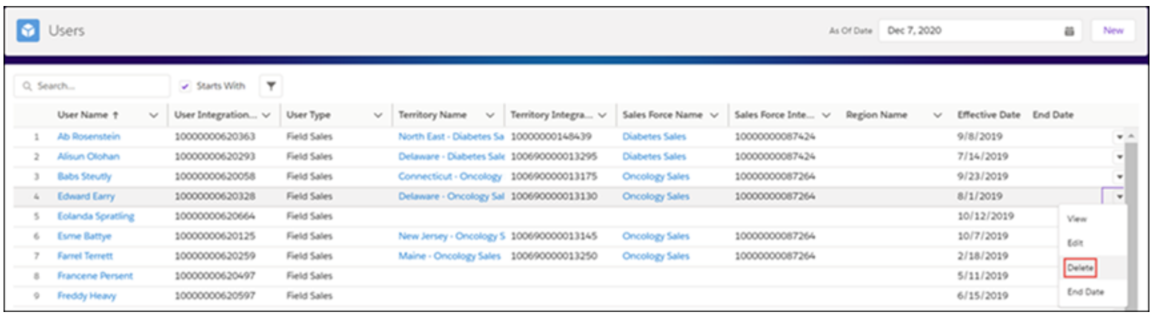
If you add a user by mistake, you can delete the user's profile.

To delete a user

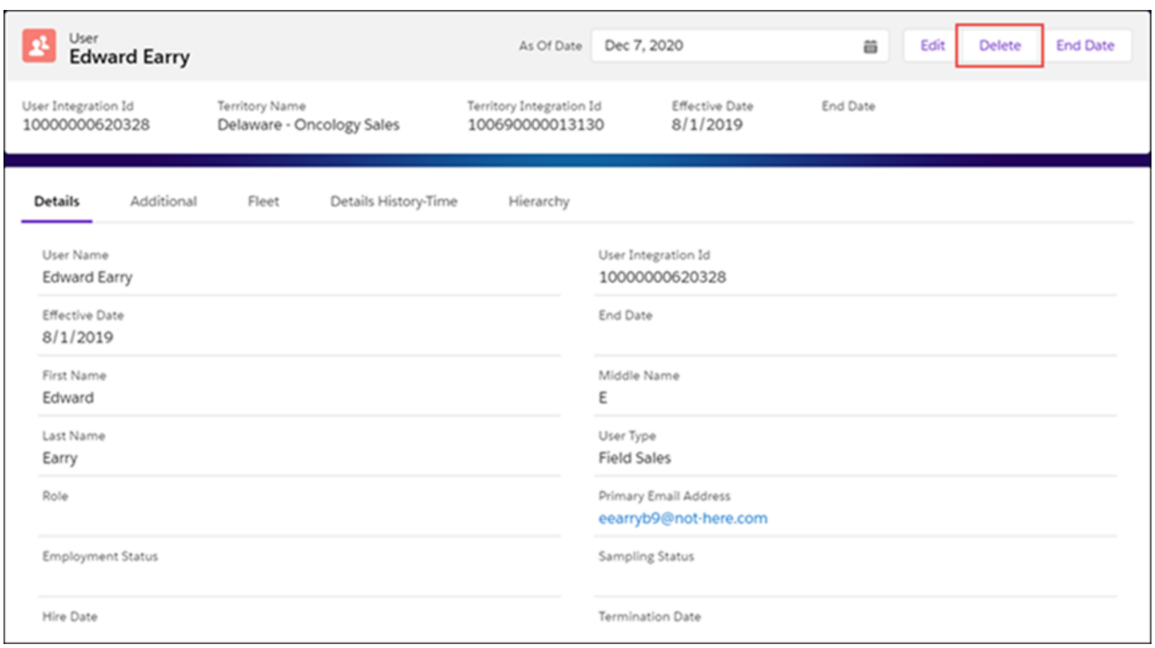
1. Click **Users** from the primary navigation bar.
2. Do one of the following:

> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions](#).

- Select the drop-down for the user you would like to delete and click **Delete**.

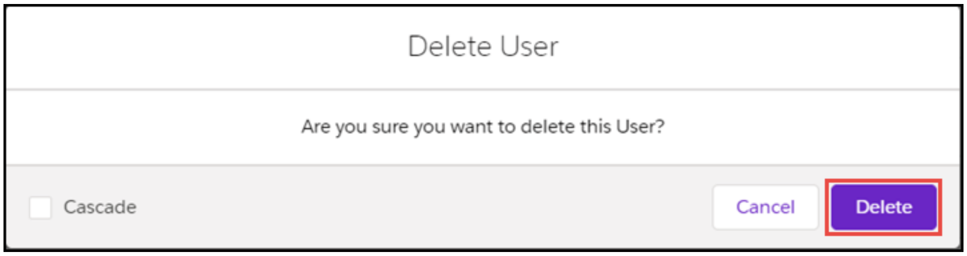


- Click the user's name to go to the user's profile page, and then click **Delete**.



3. Click **Delete** to confirm.

Note: Select **Cascade** if you want to include related user-territory assignments.



The user is removed from the system.

End Date a User

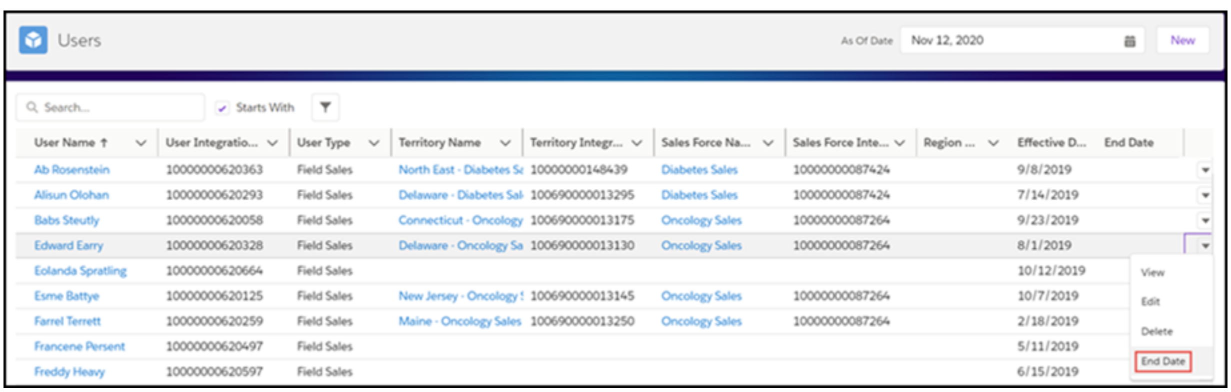
You can end date a user's profile, so the user is no longer active/valid as of the end date.

To end date a user

1. Click **Users** from the primary navigation bar.
2. Select the drop-down for the user you would like to remove and click **End Date**.

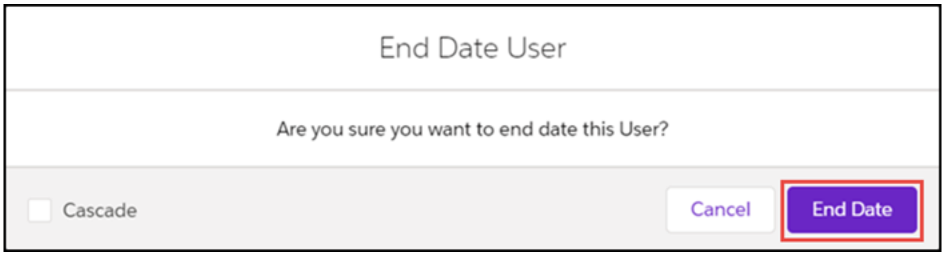
Note: Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions](#).

Note: You can also end date a user via the Edit User screen by updating the **End Date** to any date in the past, present, or future. See [Modify User Information](#).



3. Click **End Date** to confirm.

Note: Select **Cascade** if you want to include related user-territory assignments.



The user will be end dated as of the system date.

User's Personal Information

After entering primary information regarding the user, you can also add personal information.

See:

- Add a User Address
- Add an Emergency Contact
- Add a Dependent
- Add Education Information
- Modify a User Address
- Modify Emergency Contact Information
- Modify a Dependent's Information
- Modify Education Information
- End Date a User Address
- End Date an Emergency Contact
- End Date a Dependent
- End Date Education Information

Add a User Address

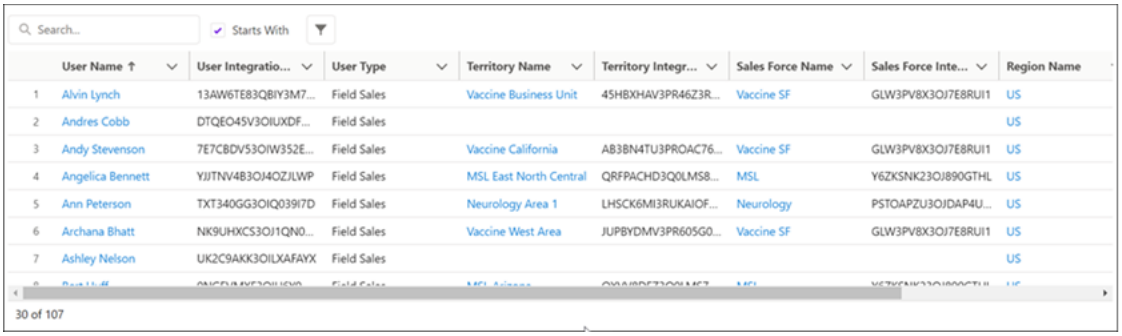
You can add addresses to the user's profile.

To add an address to a user's profile

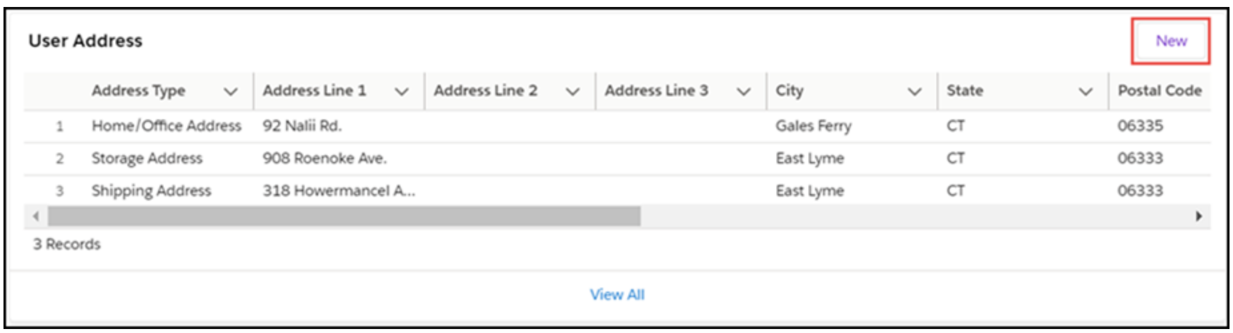
1. Click **Users** from the primary navigation bar.

2. Click the user whose profile you are adding an address to.

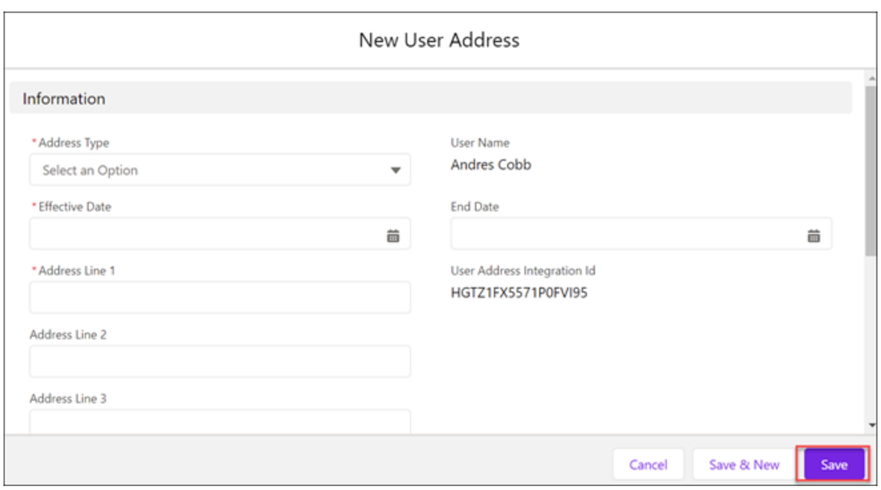
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions](#).



3. On the Details tab, scroll to the **User Address** section and click **New**.



4. Enter address information and click **Save**.



For information about the fields, see [View User Information](#).

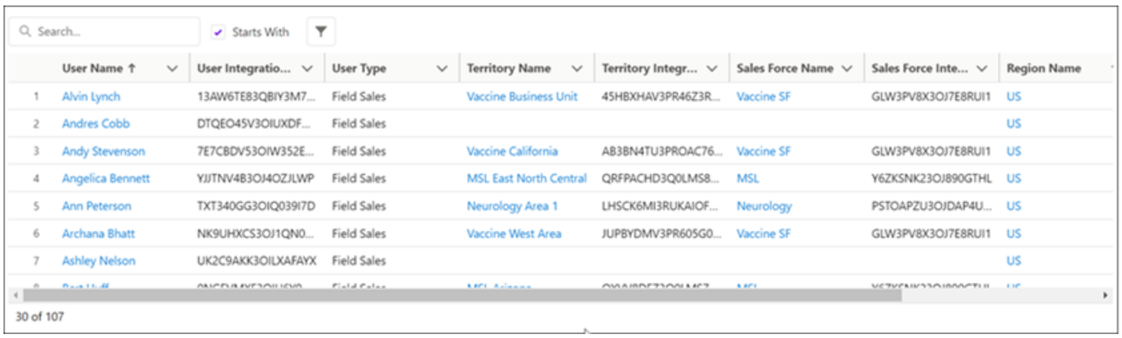
Add an Emergency Contact

You can add emergency contacts to the user's profile.

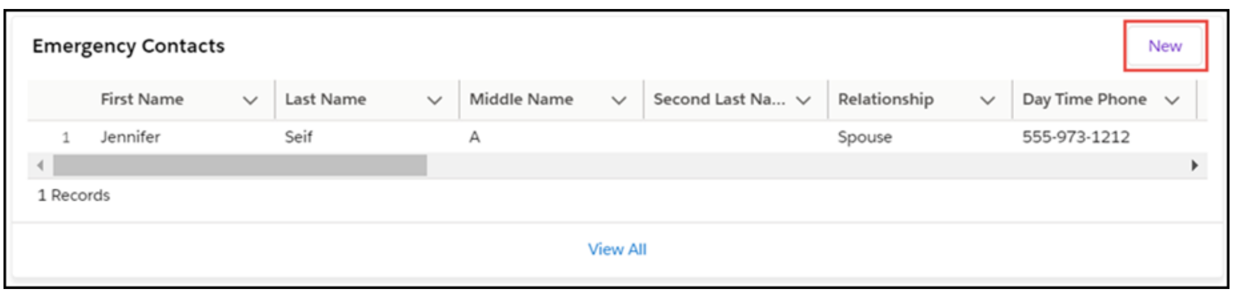
To add an emergency contact

1. Click **Users** from the primary navigation bar.
2. Click the user whose profile you are adding an emergency contact to.

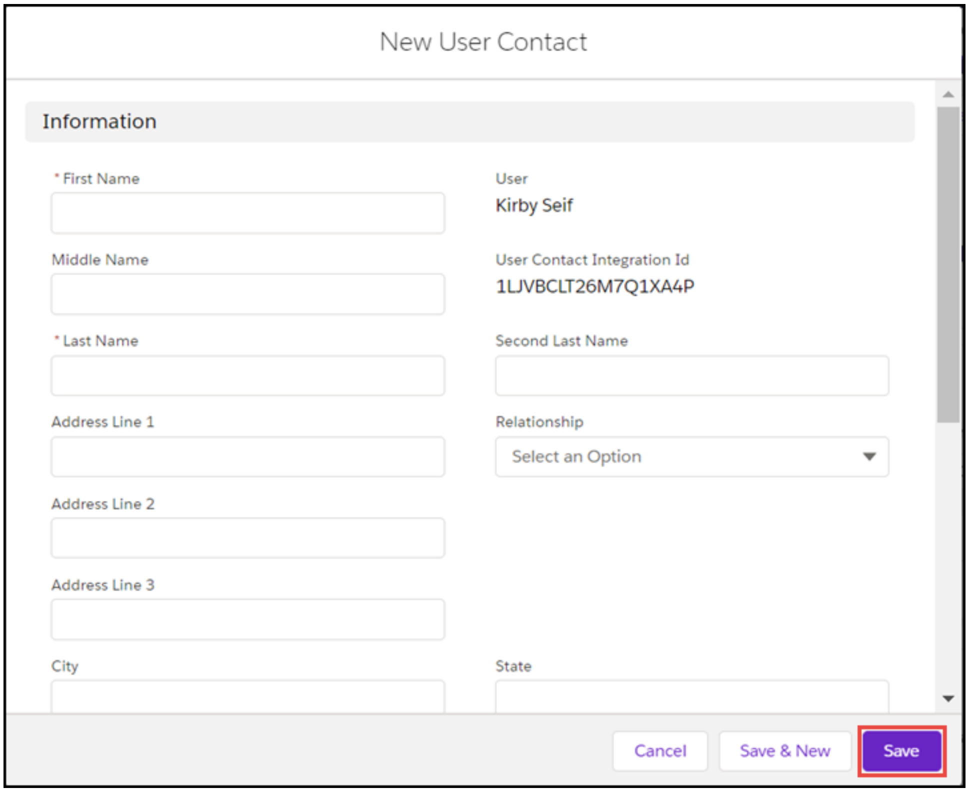
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Additional** tab, scroll to the **Emergency Contacts** section, and click **New**.



4. Enter emergency contact information and click **Save**.



For information about the fields, see View User Information.

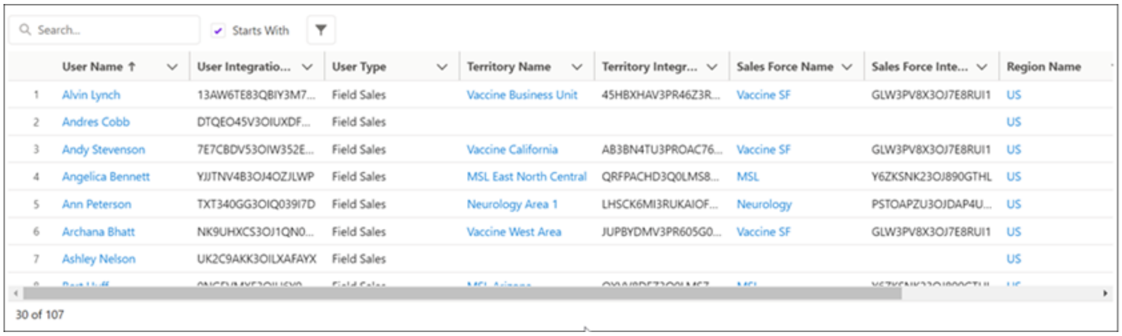
Add a Dependent

You can add dependents to the user's profile.

To add a dependent

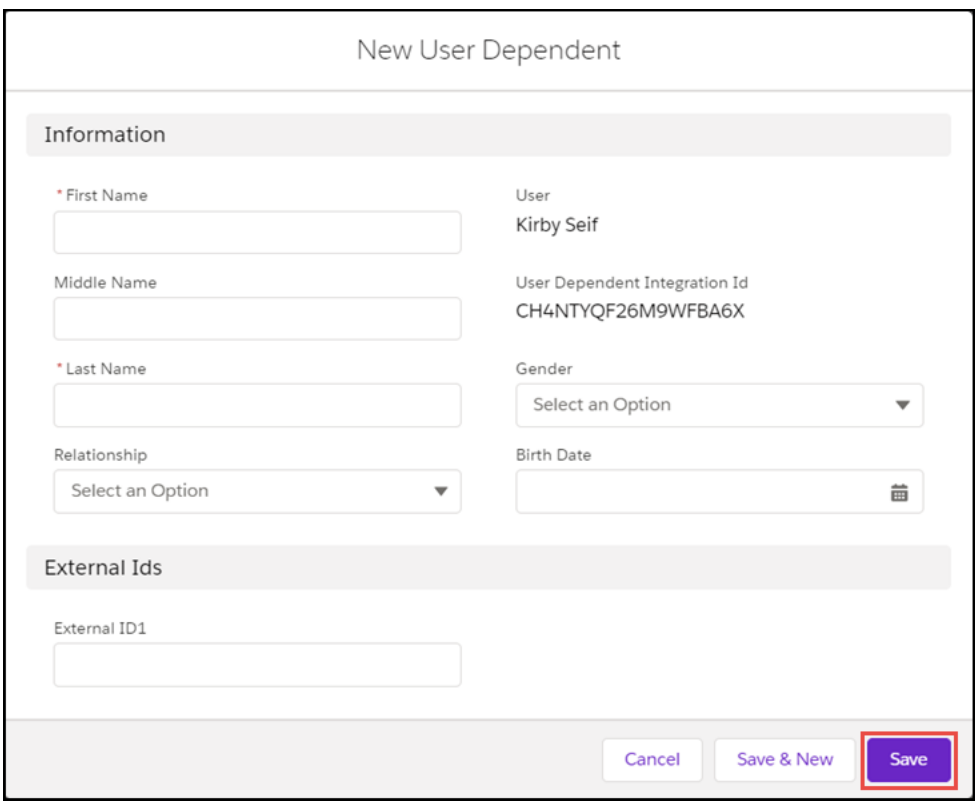
1. Click **Users** from the primary navigation bar.
2. Click the user whose profile you are adding a dependent to.

> **Note:** Use the **Search**  and **Filters**  functions to help you locate the user. See Search and Filter Functions.



3. Select the **Additional** tab, scroll to the **Dependents** section, and click **New**.

4. Enter dependent information and click **Save**.



For information about the fields, see View User Information.

Add Education Information

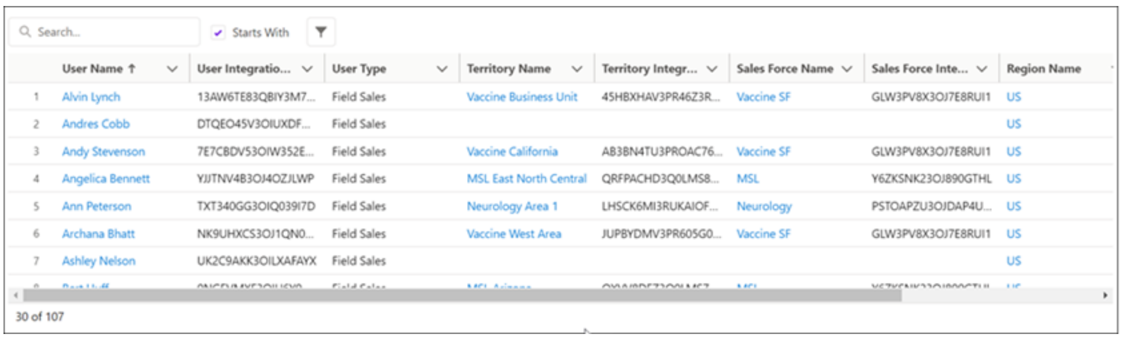
You can add education information to a user's profile.

To add education information

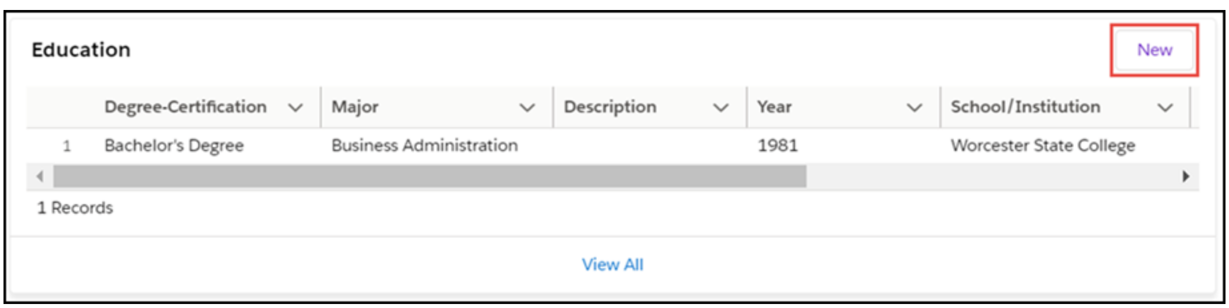
1. Click **Users** from the primary navigation bar.

2. Click the user whose profile you are adding education information to.

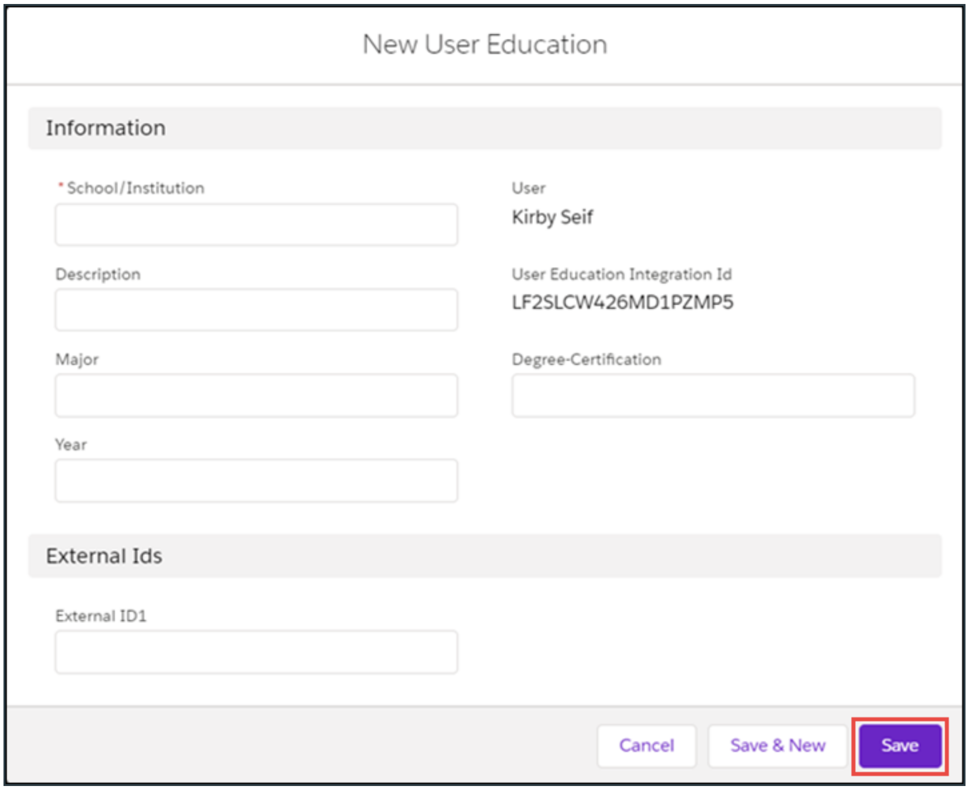
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Additional** tab, scroll to the **Education** section, and click **New**.



4. Enter education information and click **Save**.



For information about the fields, see View User Information.

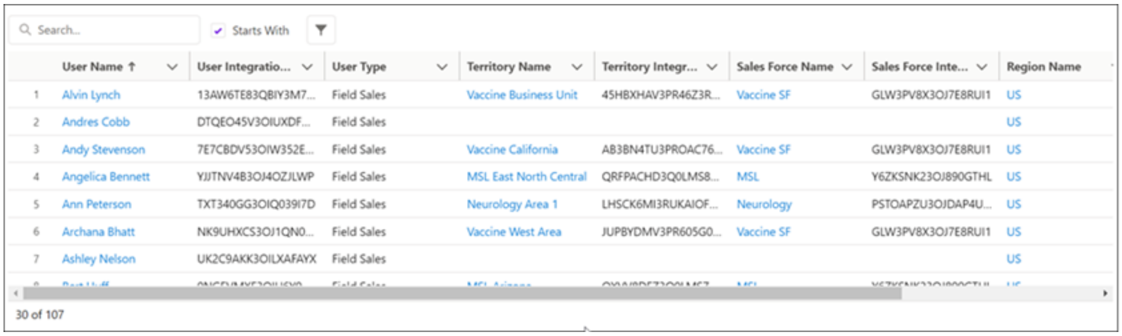
Modify a User Address

You can make updates to user addresses.

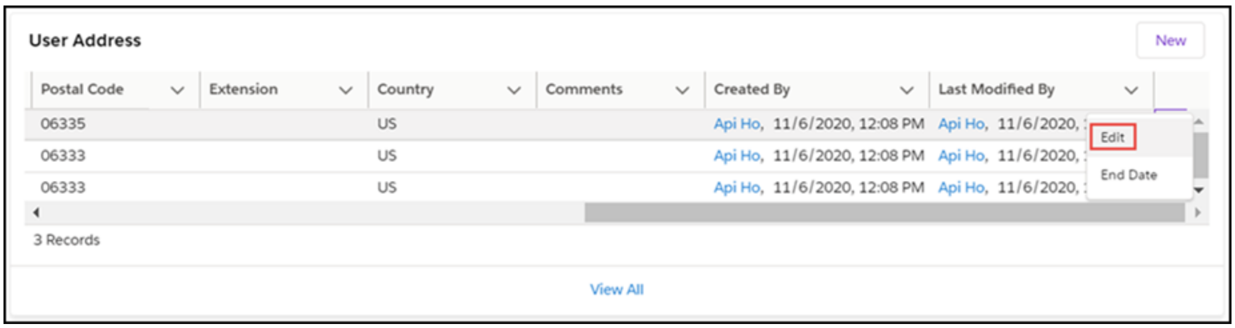
To edit a user address

1. Click **Users** from the primary navigation bar.
2. Click the user whose address you want to edit.

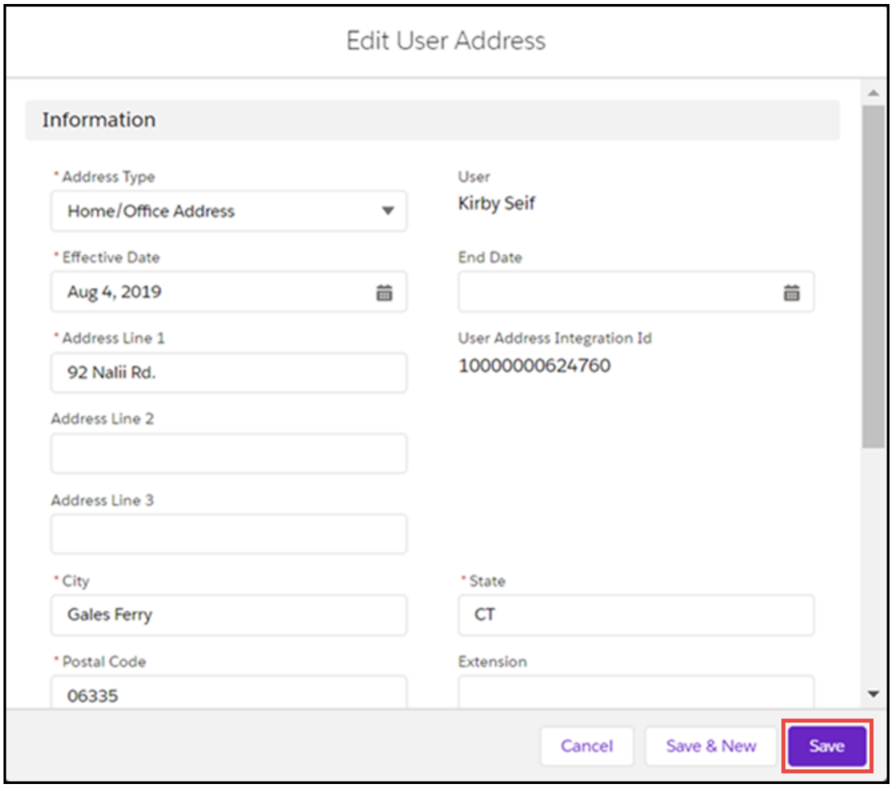
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Scroll to the **User Address** section, click the drop-down for the address you want to edit, and select **Edit**.



4. Modify the address information and click **Save**.



For information about the fields, see View User Information.

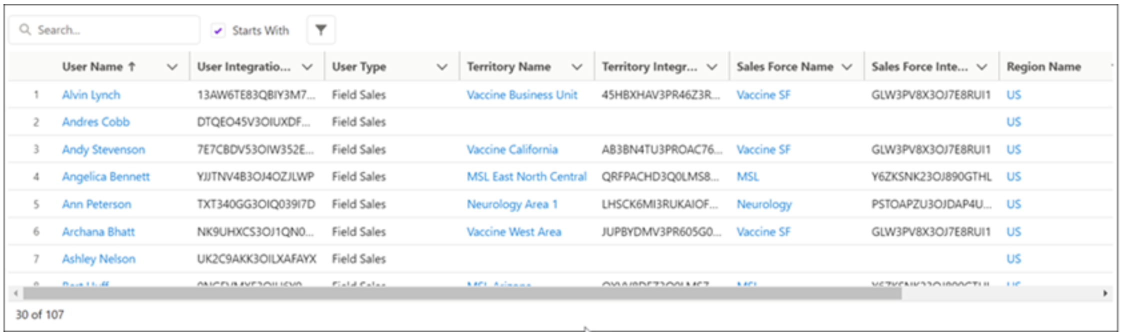
Modify Emergency Contact Information

You can make updates to a user's emergency contact information.

To edit an emergency contact

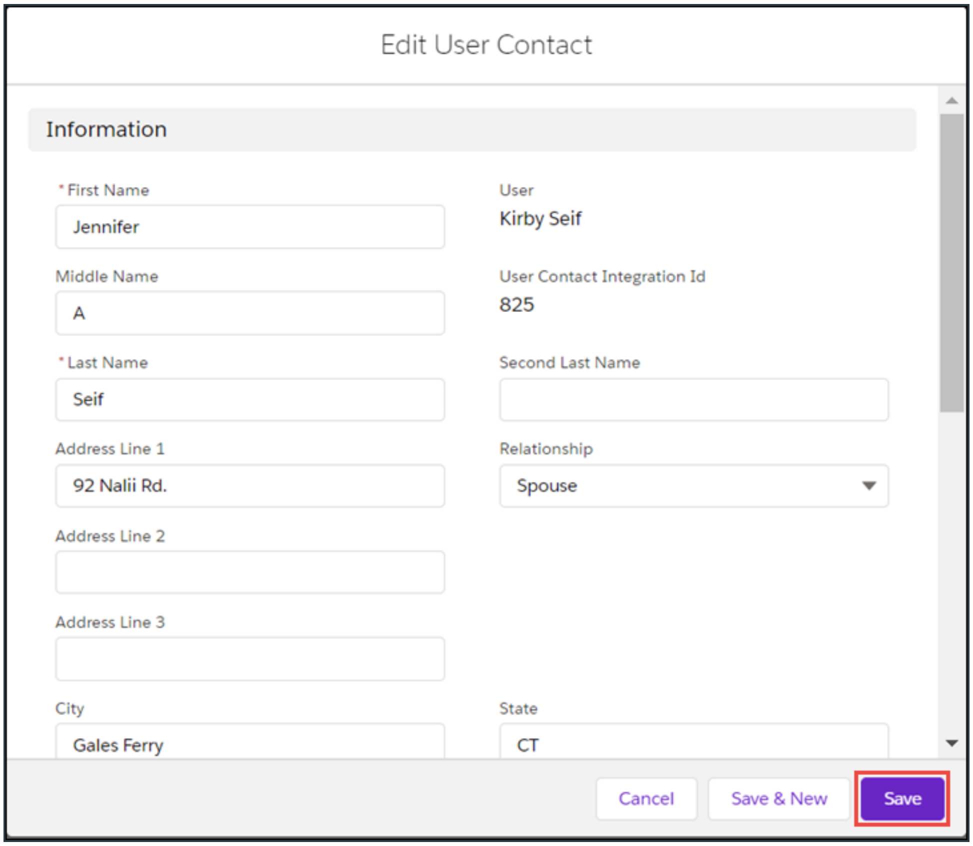
1. Click **Users** from the primary navigation bar.
2. Click the user whose emergency contact you want to edit.

> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Additional** tab, scroll to the **Emergency Contacts** section, click the drop-down for the emergency contact you want to edit, and select **Edit**.

4. Modify the emergency contact information and click **Save**.



For information about the fields, see [View User Information](#).

Modify a Dependent's Information

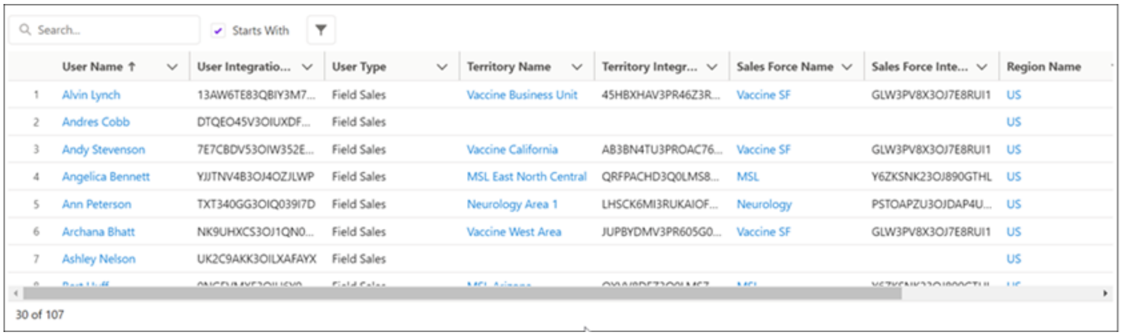
You can make updates to a dependent's information.

To edit a dependent's information

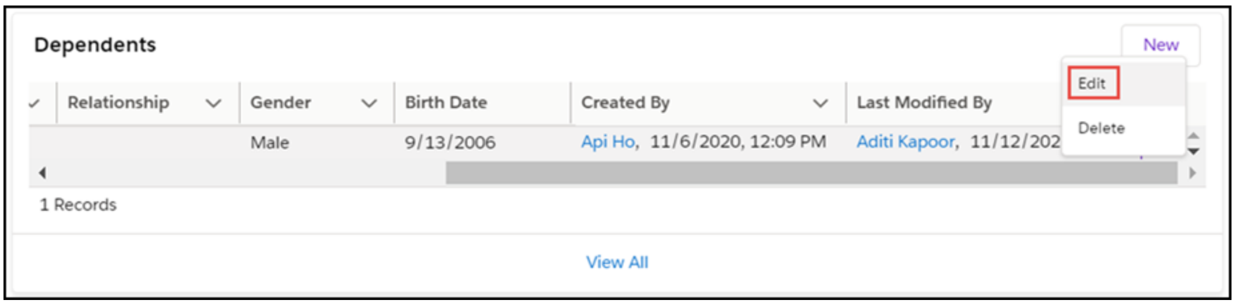
1. Click **Users** from the primary navigation bar.

2. Click the user whose dependent information you want to edit.

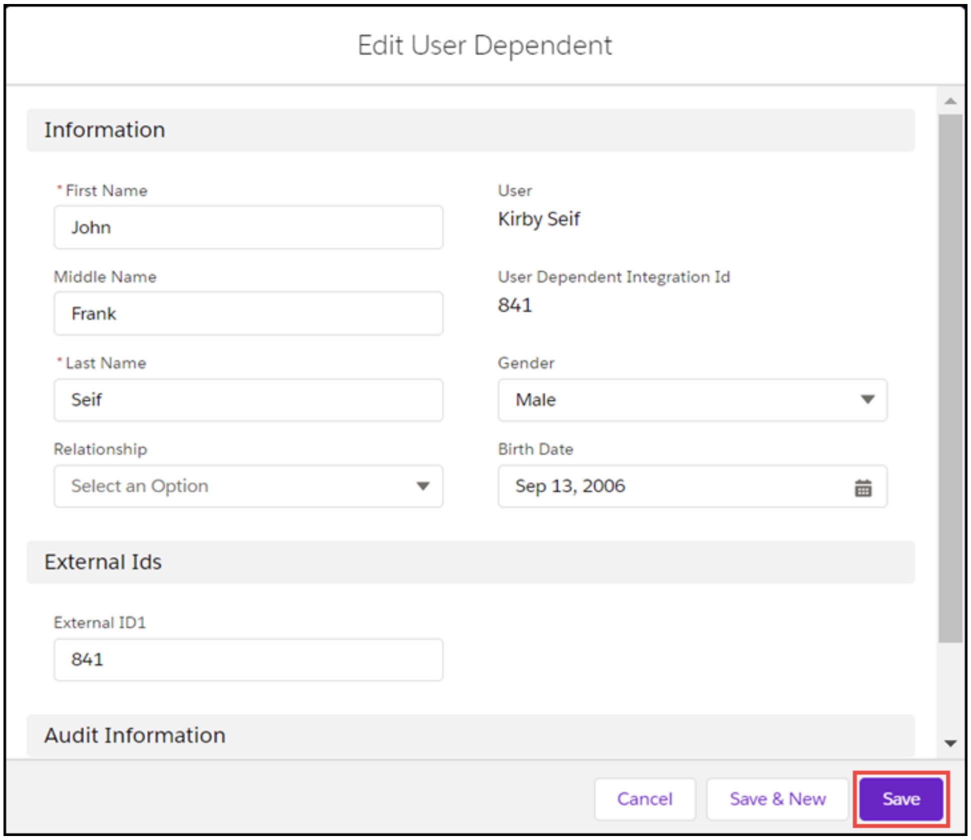
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions](#).



3. Select the **Additional** tab, scroll to the **Dependents** section, click the drop-down for the dependent whose information you want to edit, and select **Edit**.



4. Modify the dependent information and click **Save**.



For information about the fields, see View User Information.

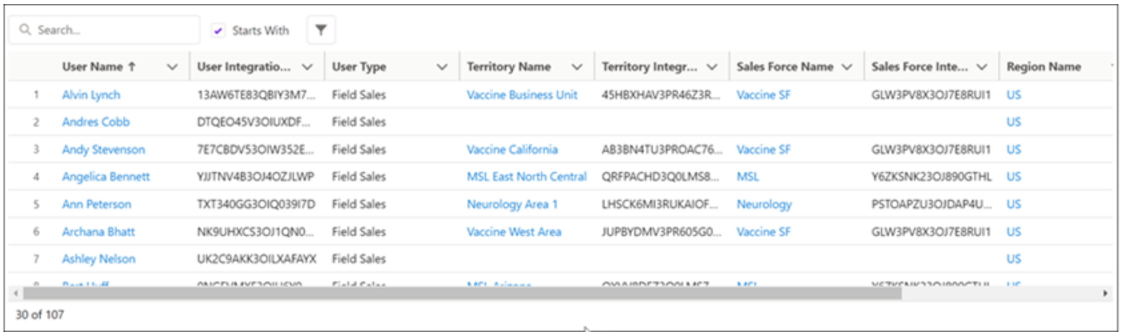
Modify Education Information

You can make updates to a user's education information.

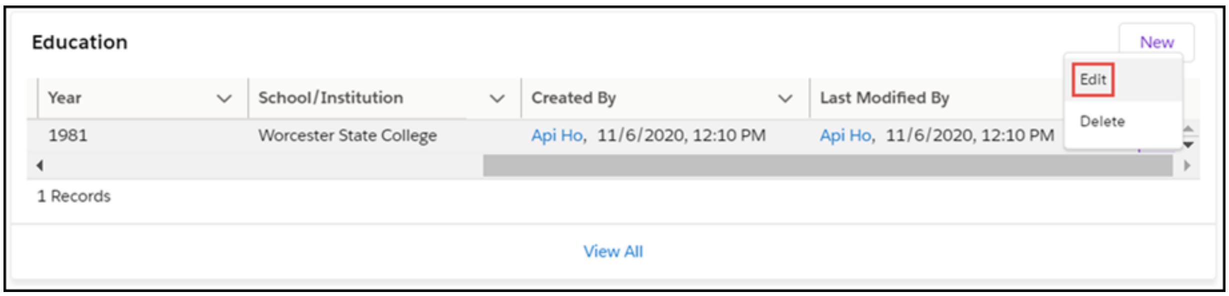
To edit a user's education information

1. Click **Users** from the primary navigation bar.
2. Click the user whose education information you want to edit.

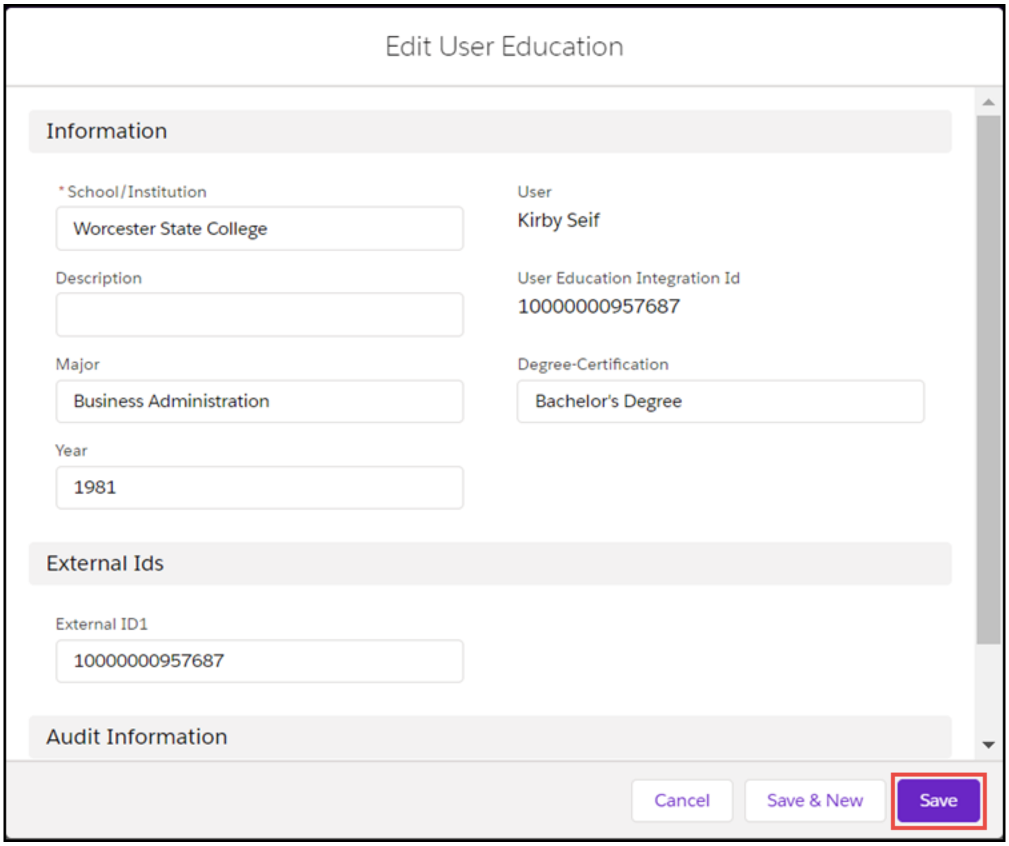
Note: Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Additional** tab, scroll to the **Education** section, click the drop-down for the education record you want to edit, and select **Edit**.



4. Modify the education information and click **Save**.



For information about the fields, see View User Information.

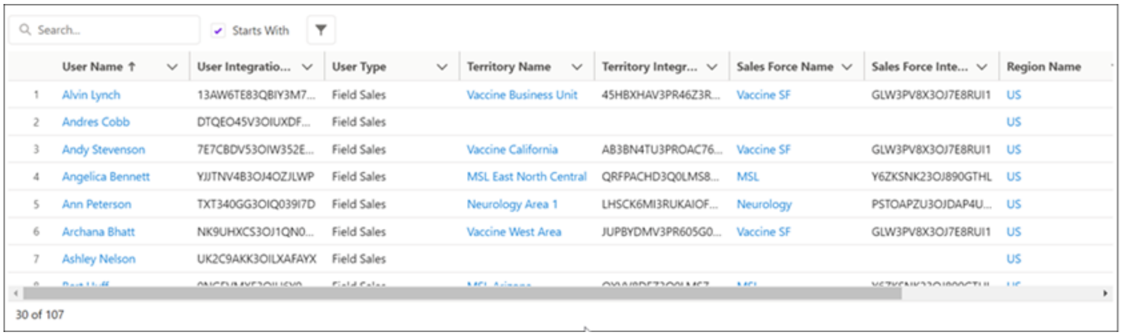
End Date a User Address

You can end date a user's address so it is no longer active/valid as of that end date.

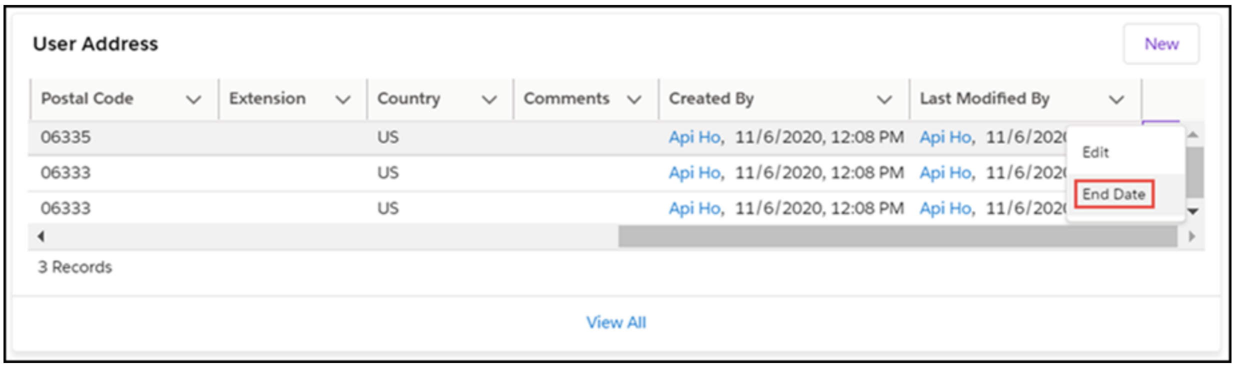
To end date a user address

1. Click **Users** from the primary navigation bar.
2. Click the user whose address you want to end date.

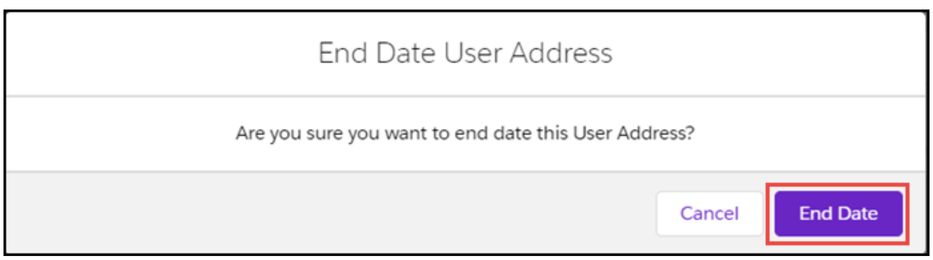
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Scroll to the **User Address** section, click the drop-down for the address you want to remove, and select **End Date**.



4. Click **End Date** to confirm.



The user address is end dated as of the system date.

End Date an Emergency Contact

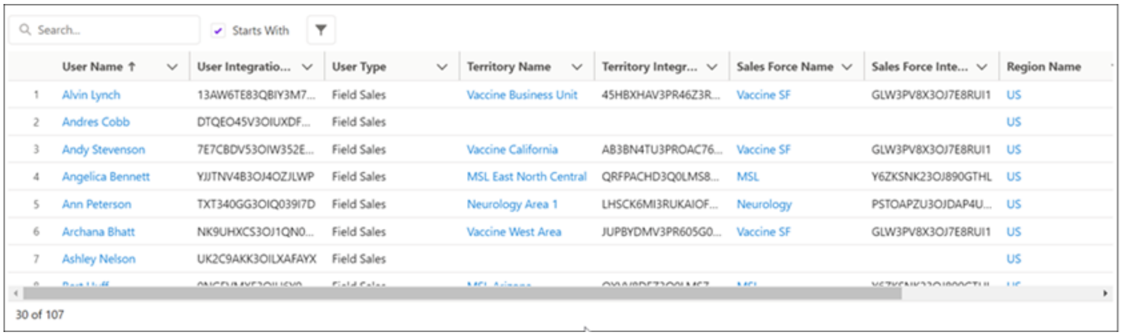
You can end date a user's emergency contact, so it is no longer active/valid as of the end date.

To end date an emergency contact

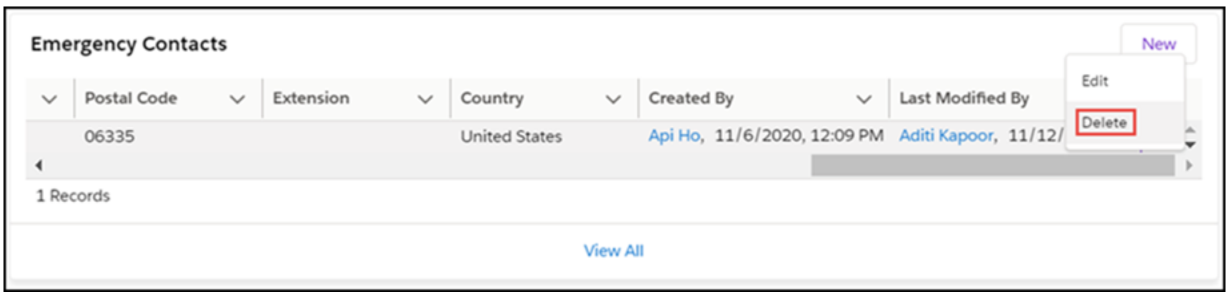
1. Click **Users** from the primary navigation bar.

2. Click the user whose emergency contact you want to end date.

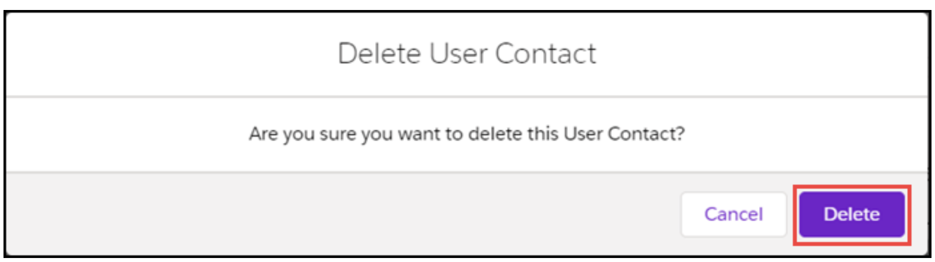
Note: Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Additional** tab, scroll to the **Emergency Contacts** section, click the drop-down for the emergency contact you want to delete, and select **Delete**.



4. Click **Delete** to confirm.



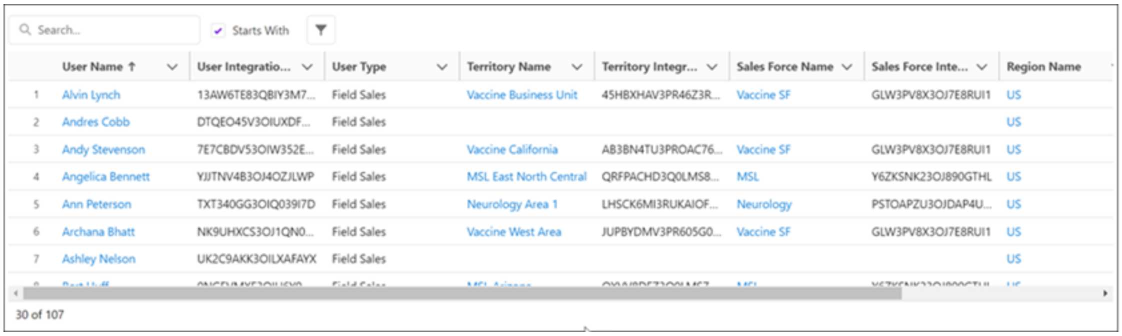
End Date a Dependent

You can end date a user's dependents, so they are no longer active/valid as of the end date.

To end date a dependent

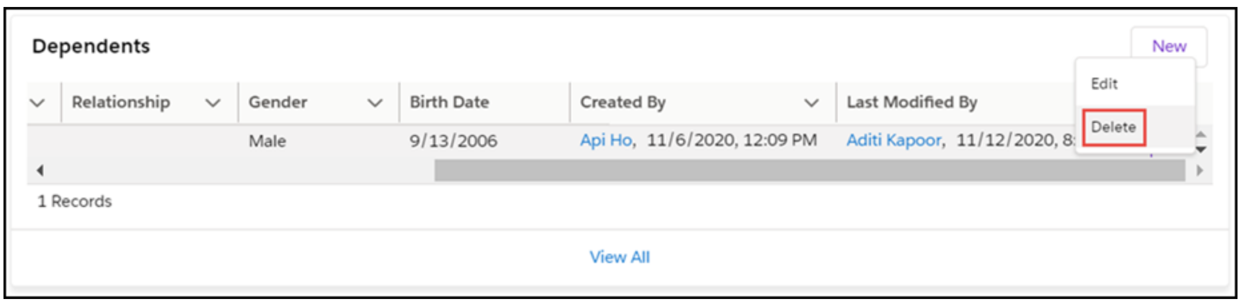
1. Click **Users** from the primary navigation bar.
2. Click the user whose dependent you want to end date.

Note: Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.

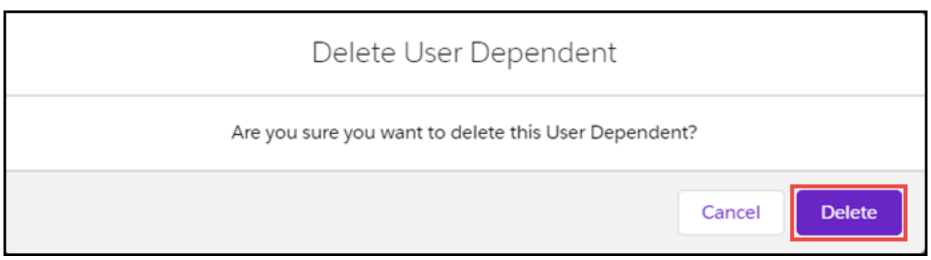


	User Name	User Integratio...	User Type	Territory Name	Territory Integr...	Sales Force Name	Sales Force Inte...	Region Name
1	Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2	Andres Cobb	DTQEO45V3OIUXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4	Angelica Bennett	YJJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ039I7D	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIOF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXCS3OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7	Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

3. Select the **Additional** tab, scroll to the **Dependents** section, click the drop-down for the dependent you want to delete, and select **Delete**.



4. Click **Delete** to confirm.



End Date Education Information

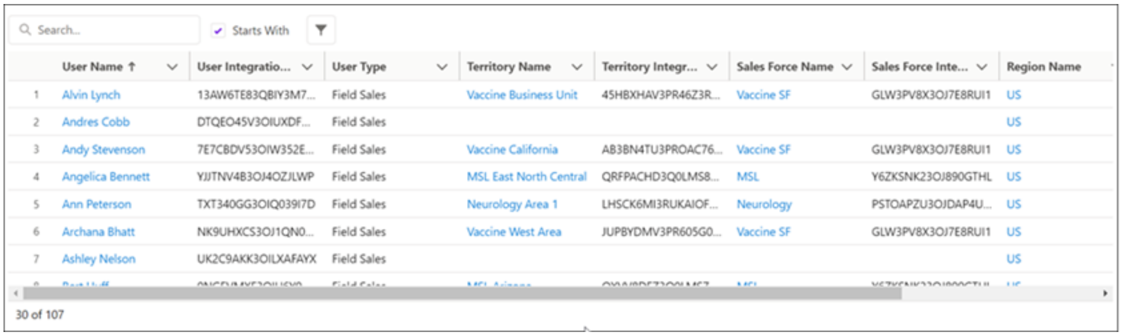
You can end date a user's education information, so it is no longer active/valid as of the end date.

To end date education information

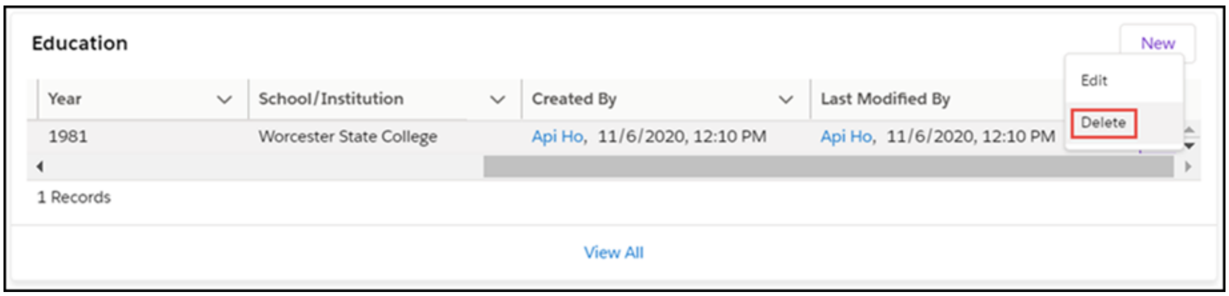
1. Click **Users** from the primary navigation bar.

2. Click the user whose education information you want to end date.

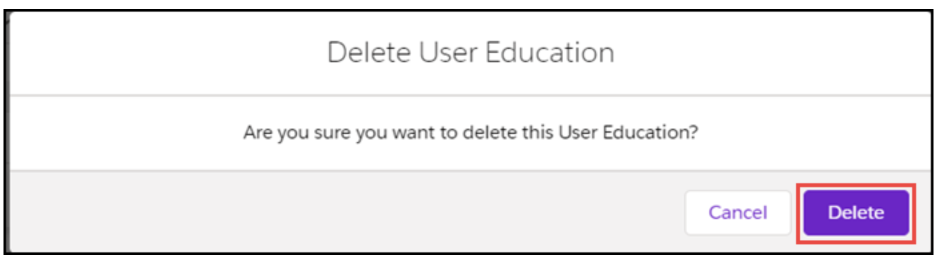
Note: Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Additional** tab, scroll to the **Education** section, click the drop-down for the education record you want to delete, and select **Delete**.



4. Click **Delete** to confirm.



User Assignments

With OCE Optimizer, you can assign a user to a Sales Area, or Territory. User assignments can be made to any Sales Area in the hierarchy. For example, a District Manager may be assigned to a Sales Area having a *District* type.

Note: A user can have the following assignments:

- A primary assignment to one or more territories at the same time. A parameter controls whether a territory can have two users as a primary assignment.
- A primary assignment and a secondary assignment to one or more territories at the same time.

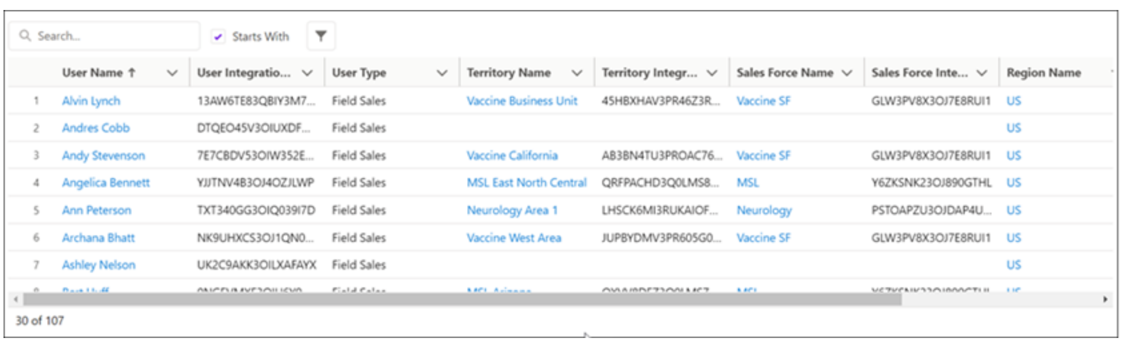
Add a User Assignment

You can add and manage user assignments within a scenario (see *Add a User Assignment to a Scenario* (page 1)), or within the organization hierarchy in the **Users** and **Territories** modules.

To add a user assignment from the Users or Territories modules

1. Click **Users** or **Territories** from the primary navigation bar.
2. Click the user for whom you want to add an assignment, or select the territory to which you want to add an assignment.

   Note: Use the **Search** and **Filters** functions to help you locate the user or territory. See Search and Filter Functions.

   Search... Starts With

	User Name	User Integratio...	User Type	Territory Name	Territory Integr...	Sales Force Name	Sales Force Inte...	Region Name
1	Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2	Andres Cobb	DTQEO45V3OIUXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4	Angelica Bennett	YJJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ039I7D	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIOF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXCS3OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7	Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

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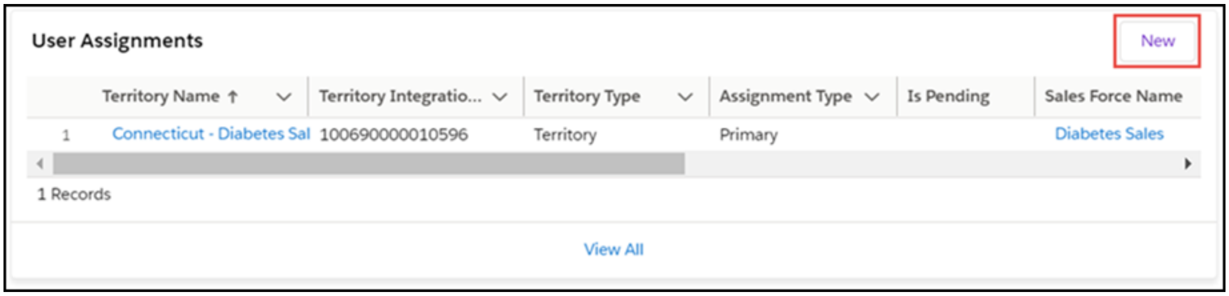
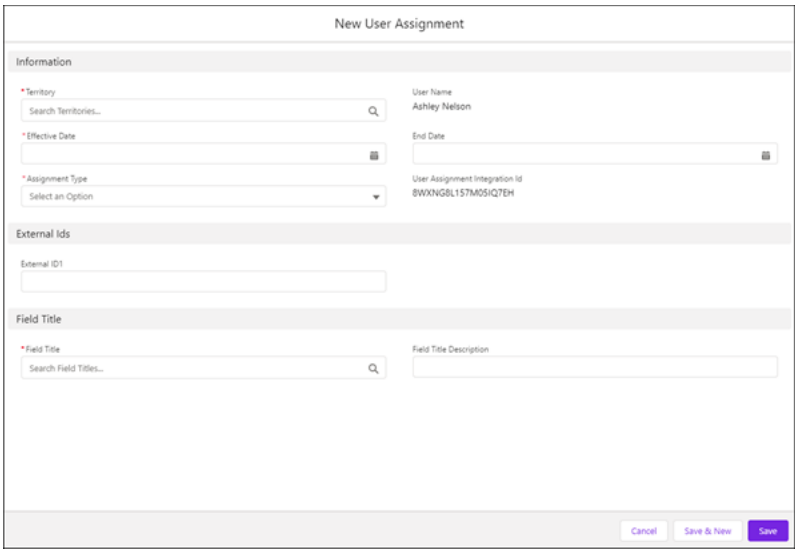
3. Scroll to the **User Assignments** section and click **New**. You can also create a user assignment from the **Users** module's **Details History-Time** tab.

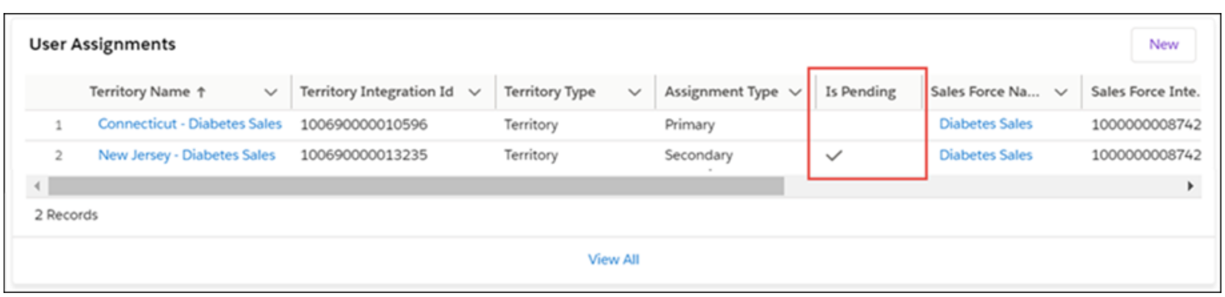


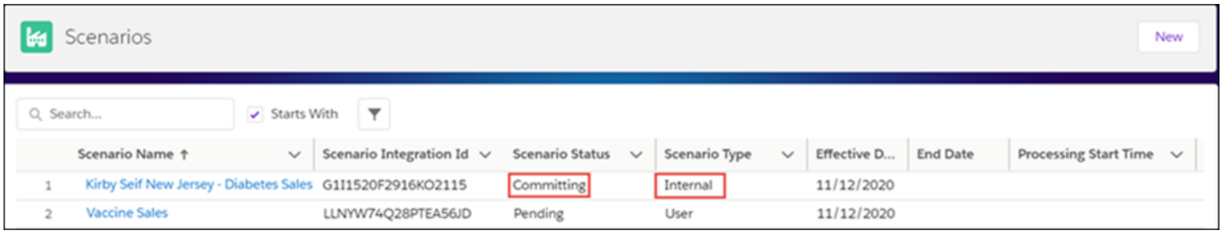
4. Enter the user's assignment information and click **Save**.



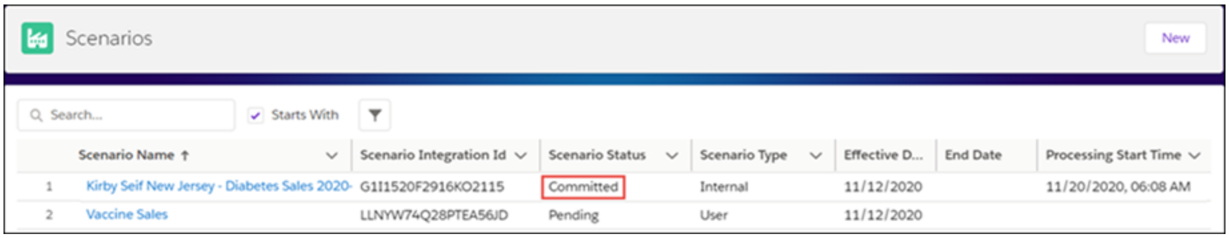
For information about the fields, see View User Information.

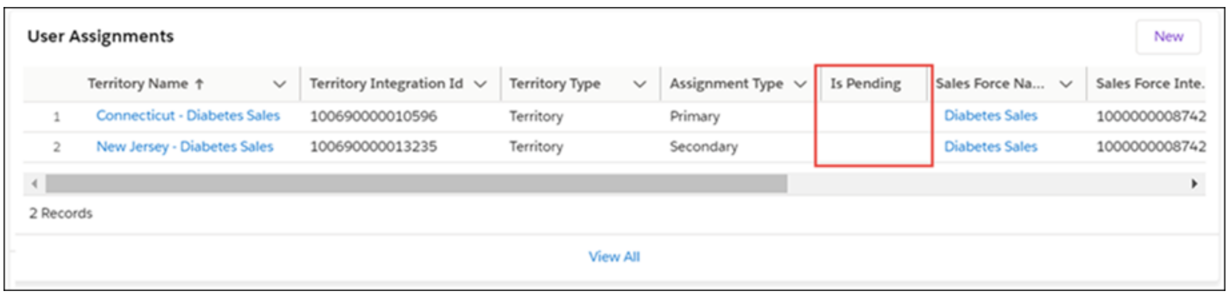
The system creates an internal scenario to process the request. The user assignment is pending until the scenario is processed.





After the internal record finishes processing, the user assignment is created.





Modify a User Assignment

You can make updates to the assignment type, the effective date, and the end date of users' assignments from the **Users** module.

To edit a user assignment

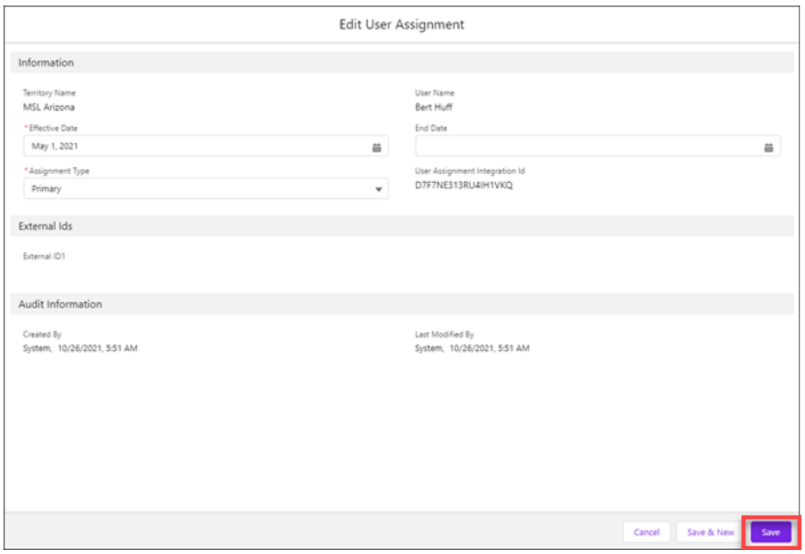
1. Click **Users** from the primary navigation bar.

2. Select the user whose assignment you want to edit.

> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.

3. Scroll to the **User Assignments** section, click the drop-down for the assignment you want to edit, and select **Edit**.

4. Modify the **Assignment Type**, **Effective Date** and/or **End Date** and click **Save**.



For information about the fields, see View User Information.

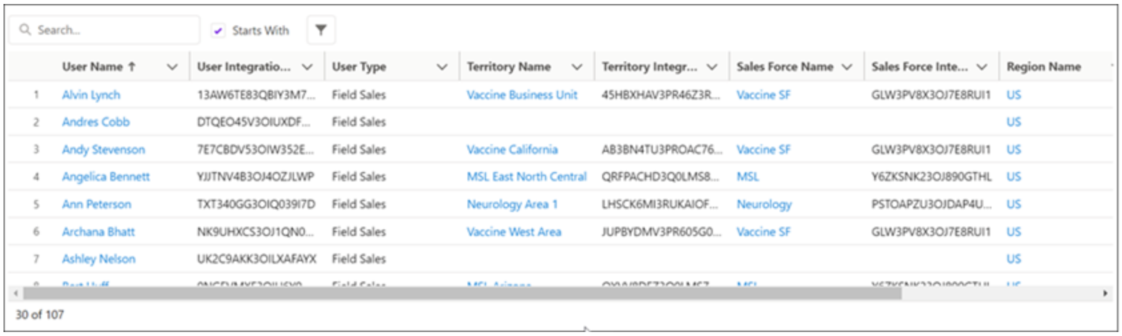
Delete a User Assignment

You can delete user assignments within a scenario (see Delete a Transaction or Rule from a Scenario, or within the organization hierarchy in the **Users** and **Territories** modules.

To delete a user assignment from the Users or Territories modules

1. Click **Users** or **Territories** from the primary navigation bar.
2. Select the user for whom you want to delete an assignment, or select the territory from which you want to delete an assignment.

Note: Use the **Search** and **Filters** functions to help you locate the user or territory. See Search and Filter Functions.



	User Name	User Integratio...	User Type	Territory Name	Territory Integr...	Sales Force Name	Sales Force Inte...	Region Name
1	Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2	Andres Cobb	DTQEO45V3OIUXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4	Angelica Bennett	YJJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3QOLMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIOF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXCS3OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7	Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

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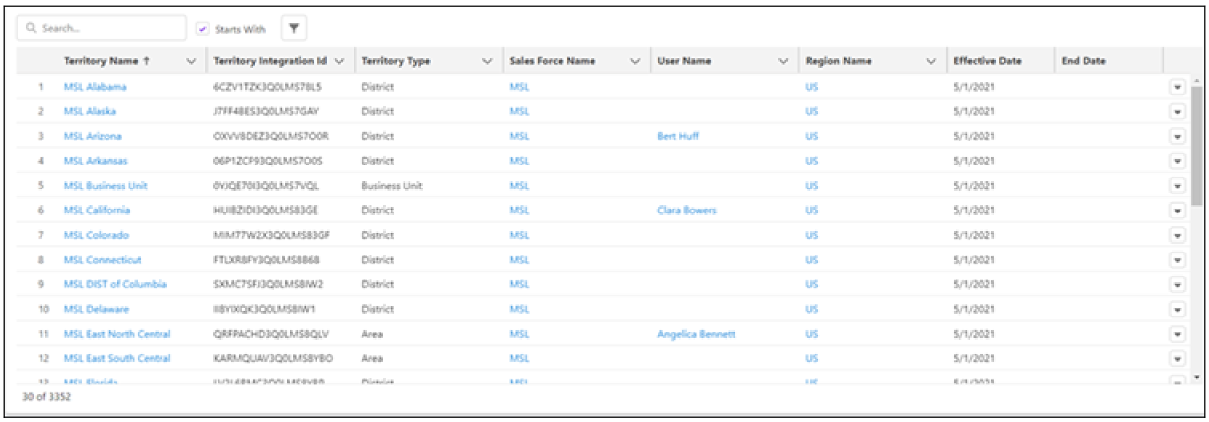

	Territory Name	Territory Integration Id	Territory Type	Sales Force Name	User Name	Region Name	Effective Date	End Date
1	MSL Alabama	6CZV1TZK3Q0LMS78L5	District	MSL		US	5/1/2021	
2	MSL Alaska	J7FF48ES3Q0LMS7GAY	District	MSL		US	5/1/2021	
3	MSL Arizona	OXVV8DEZ3Q0LMS7O0R	District	MSL	Bert Huff	US	5/1/2021	
4	MSL Arkansas	06P1ZCF93Q0LMS7O0S	District	MSL		US	5/1/2021	
5	MSL Business Unit	0VJQE70I3Q0LMS7VQL	Business Unit	MSL		US	5/1/2021	
6	MSL California	HUIBZIDI3Q0LMS83GE	District	MSL	Clara Bowers	US	5/1/2021	
7	MSL Colorado	MIM77W2X3Q0LMS83GF	District	MSL		US	5/1/2021	
8	MSL Connecticut	FTLXR8FY3Q0LMS8868	District	MSL		US	5/1/2021	
9	MSL DIST of Columbia	SXMC7SFJ3Q0LMS8IW2	District	MSL		US	5/1/2021	
10	MSL Delaware	IIBYIXQK3Q0LMS8IW1	District	MSL		US	5/1/2021	
11	MSL East North Central	QRFPACHD3Q0LMS8QLV	Area	MSL	Angelica Bennett	US	5/1/2021	
12	MSL East South Central	KARMQUAV3Q0LMS8YBO	Area	MSL		US	5/1/2021	

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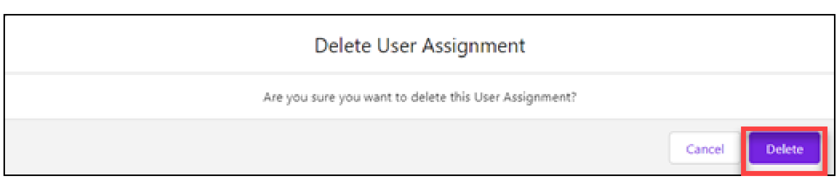
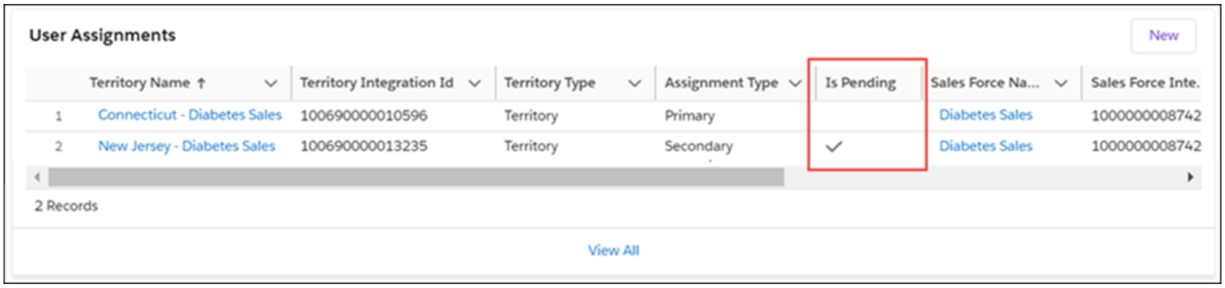
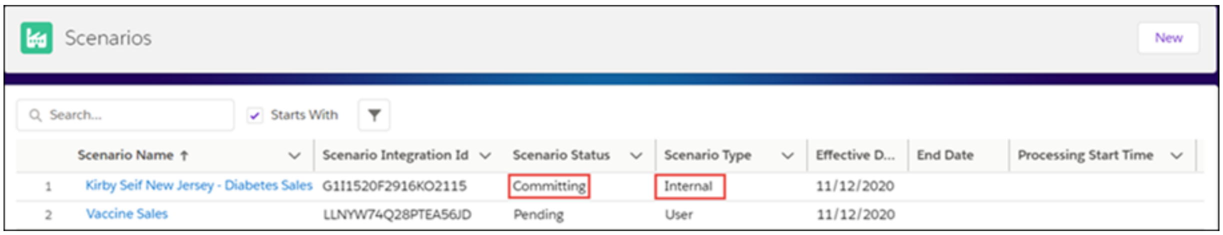
3. Scroll to the **User Assignments** section, click the drop-down for the assignment you want to delete, and select **Delete**.

4. Click **Delete**.



The system creates an internal scenario to process the request. The user assignment is pending until the scenario is processed.





After the internal record finishes processing, the user assignment is deleted.

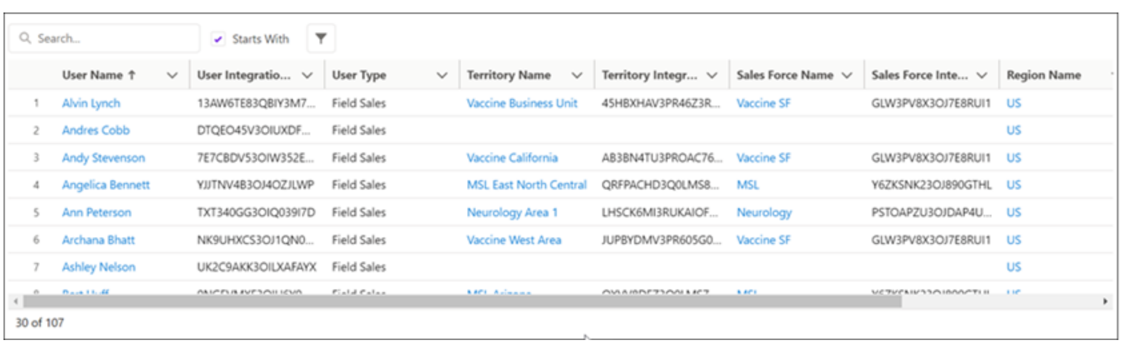
End Date a User Assignment

You can end date a user's assignment, so it is no longer active/valid as of the end date.

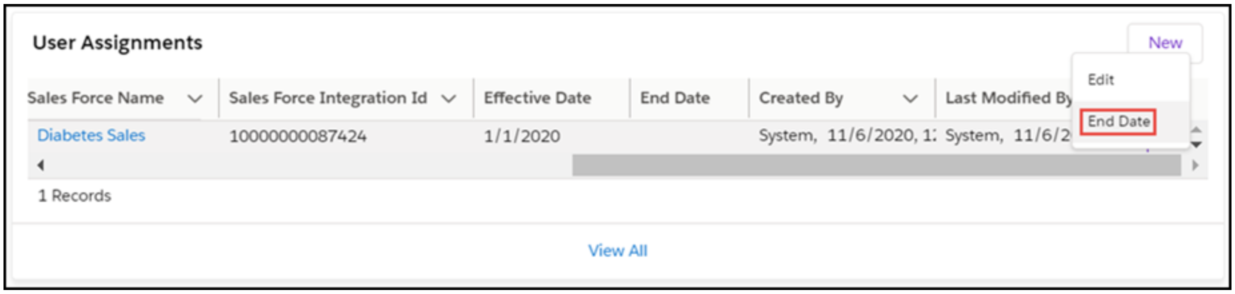
To end date a user assignment

1. Click **Users** from the primary navigation bar.
2. Click the user whose assignment you want to end date.

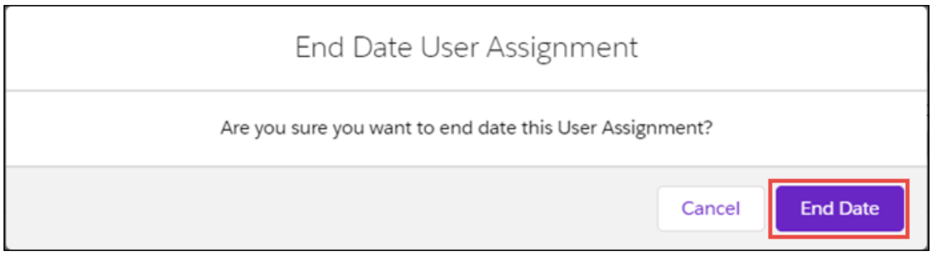
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions](#).



3. Scroll to the **User Assignments** section, click the drop-down for the assignment you want to end date, and select **End Date**.



4. Click **End Date** to confirm.



The user assignment is end dated as of the system date.

Move a User Assignment

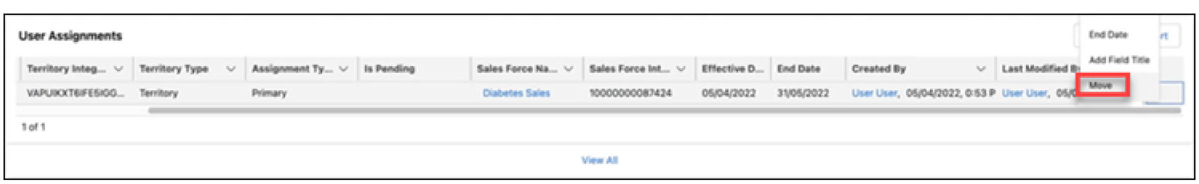
You can move user assignments to another territory from the **Users** or **Territories** modules.

To move a user assignment

1. Click **Users** or **Territories** from the primary navigation bar.
2. Select the user whose assignment you want to move.

> **Note:** Use the **Search** and **Filters** functions to help you locate the user or territory. See Search and Filter Functions.

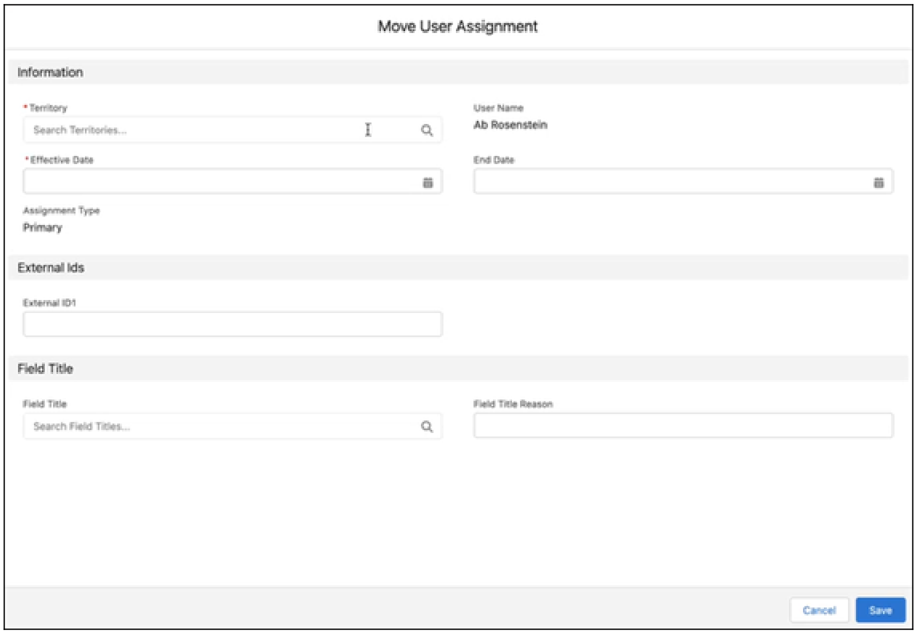
3. Scroll to the **User Assignments** section, click the drop-down for the assignment you want to move, and select **Move**.



For information about the fields, see View User Information.

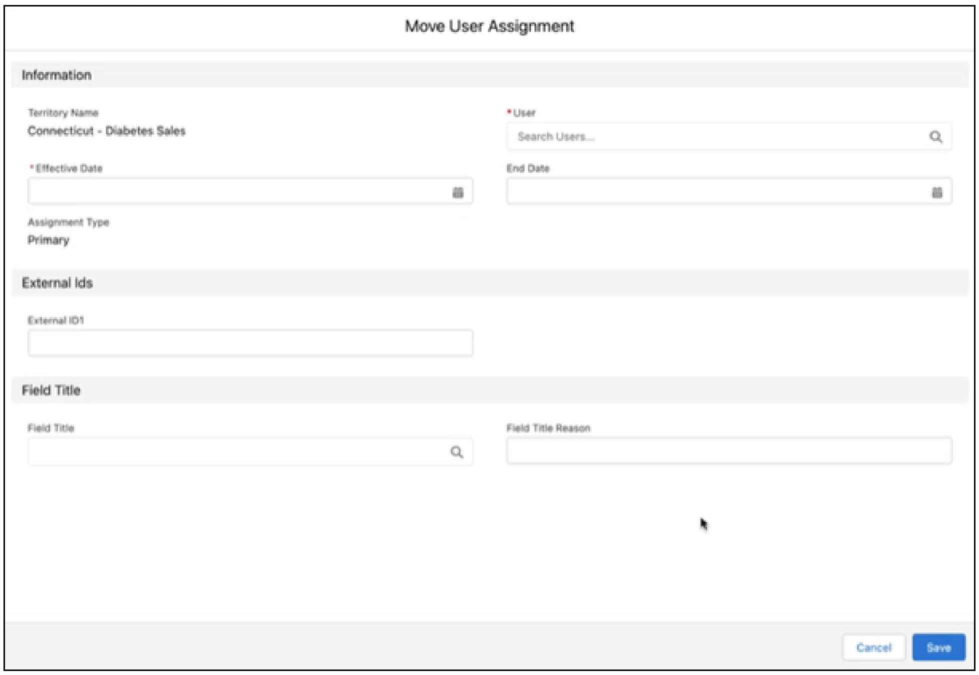
4. Do one of the following:

- From the Users module, modify the **Territory**, **Effective Date** and/or **End Date**, **Field Title**, and **Field Title Reason** fields, then click **Save**.



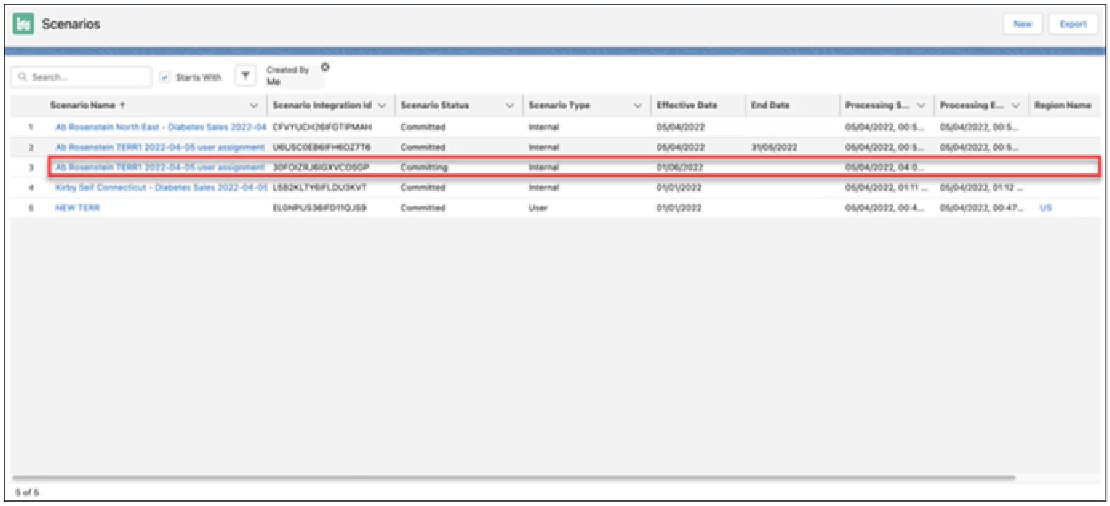
- From the **Territories** module, modify the **User**, **Effective Date** and/or **End Date**, **Field Title**, and **Field Title Reason** fields, then click **Save**.

> **Note:** **Field Title** and **Field Title Reason** are only available if the Field Title parameter is set to *User-Territory*. Contact your system administrator for more information.



For information about the fields, see View User Information.

A scenario with a *Committing* status is automatically created.



User Communications

The **Communications** section contains communication between the user and the client. You can add, modify, and delete user communications.

See:

- Add a Communication
- Modify a Communication
- End Date (Delete) a Communication

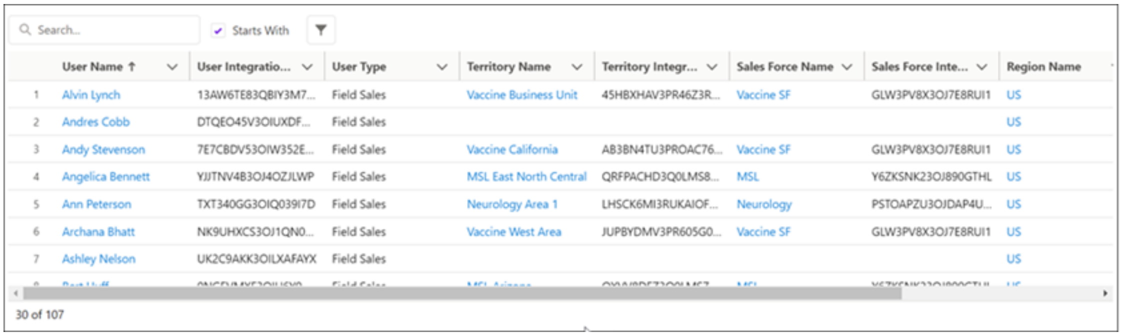
Add a Communication

You can add communications to the user's profile.

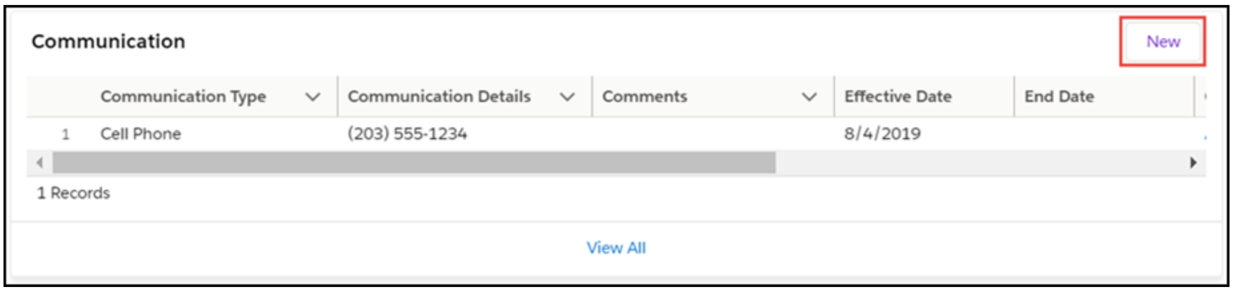
To add a communication to a user's profile

1. Click **Users** from the primary navigation bar.
2. Click the user whose profile you are adding a communication to.

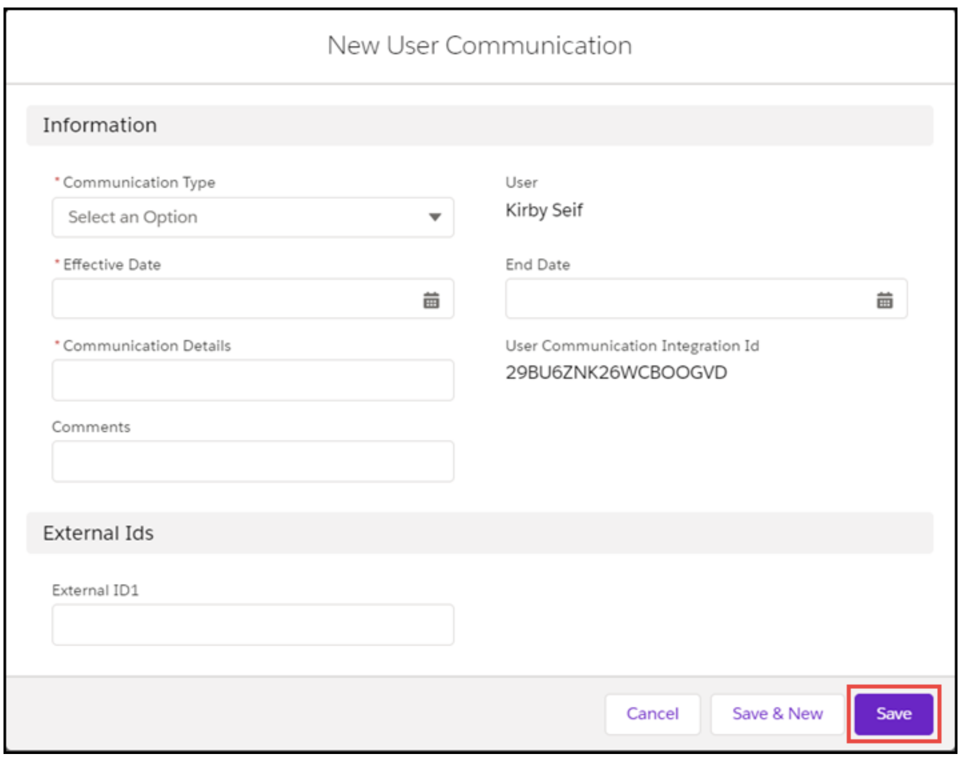
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Scroll to the **Communication** section and click **New**.



4. Enter communication information and click **Save**.



For information about the fields, see View User Information.

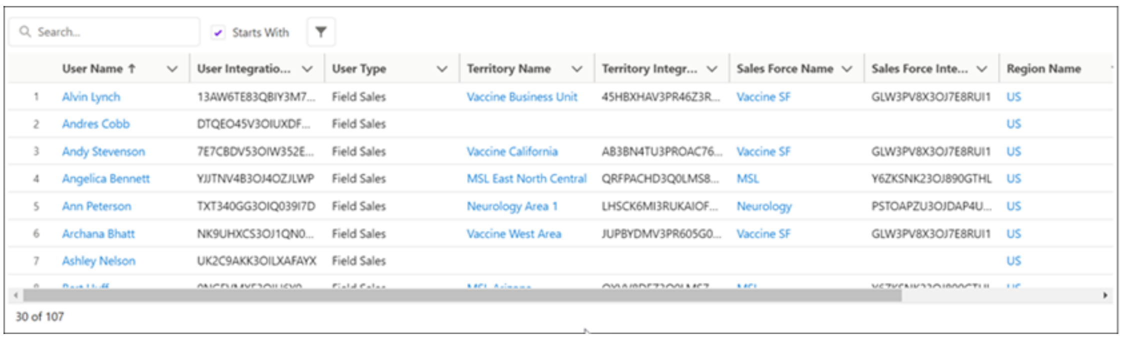
Modify a Communication

You can make updates to user communications.

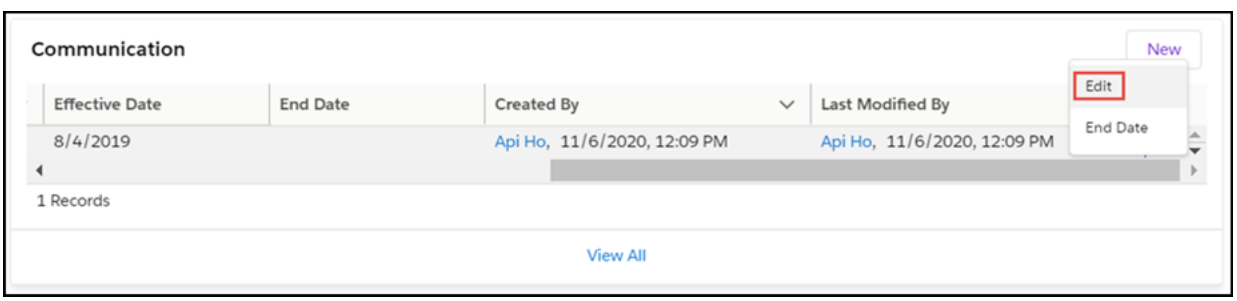
To edit a communication

1. Click **Users** from the primary navigation bar.
2. Click the user whose communication you will be editing.

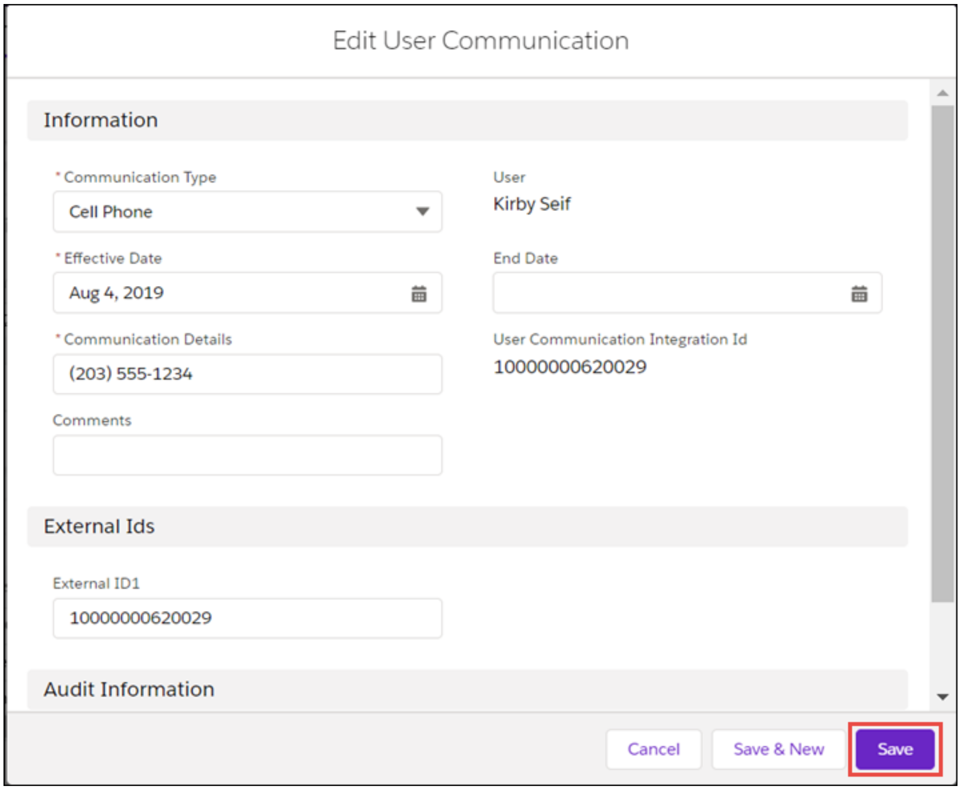
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Scroll to the **Communication** section, click the drop-down for the communication you want to edit, and select **Edit**.



4. Modify the communication information and click **Save**.



For information about the fields, see View User Information.

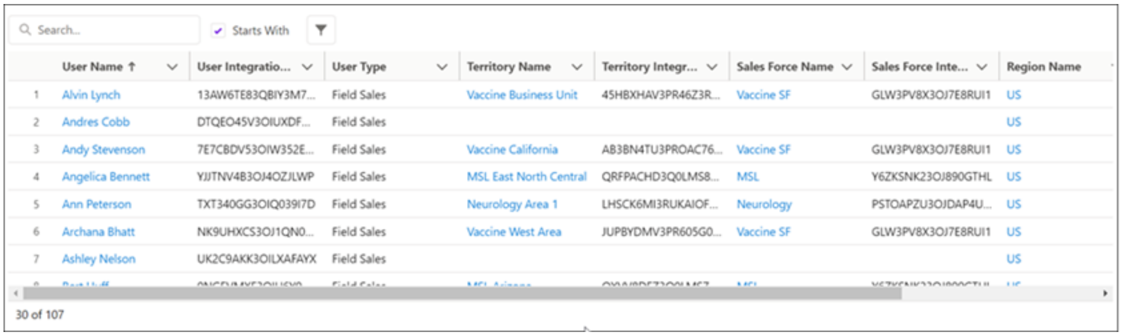
End Date (Delete) a Communication

You can end date (delete) a user's communications, so they are no longer active/valid as of the end date.

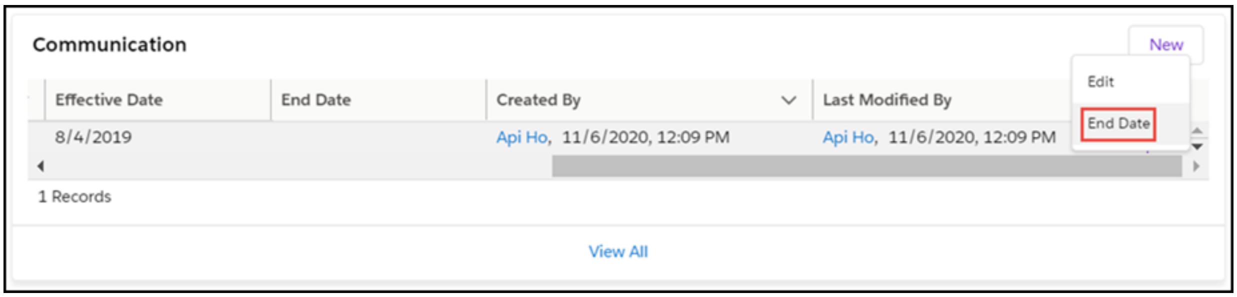
To end date a communication

1. Click **Users** from the primary navigation bar.
2. Click the user whose communication you want to end date.

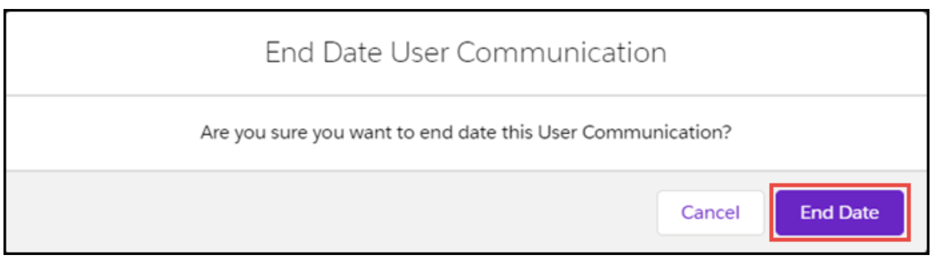
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Scroll to the **Communication** section, click the drop-down for the communication you want to delete, and select **End Date**.



4. Click **End Date** to confirm.



The communication record is end dated as of the system date.

User Driver and Vehicle Information

From the Fleet page, you can add, modify, and delete vehicle information, driver information, and driver accident information.

See:

- Add Vehicle Information
- Add a Driver
- Add an Accident or Incident Record

- Modify Vehicle Information
- Modify Driver Information
- Modify an Accident or Incident Record
- End Date (Delete) Vehicle Information
- End Date (Delete) a Driver
- End Date (Delete) an Accident or Incident Record

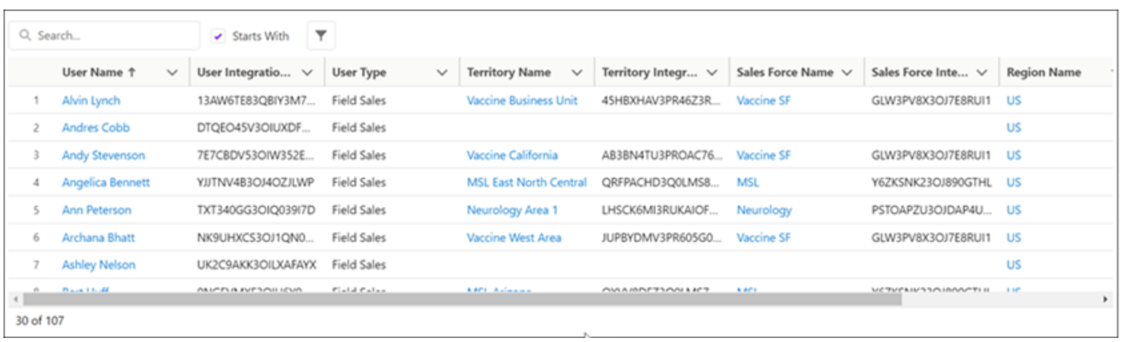
Add Vehicle Information

You can add vehicle information to the user's profile.

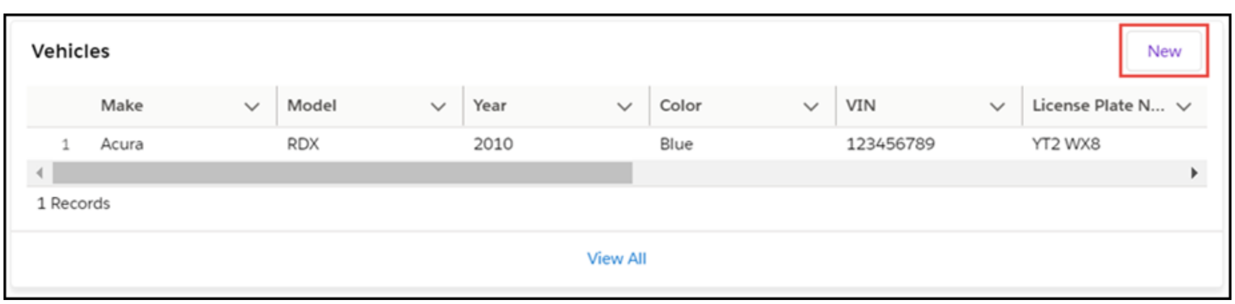
To add vehicle information

1. Click **Users** from the primary navigation bar.
2. Click the user whose profile you are adding vehicle information to.

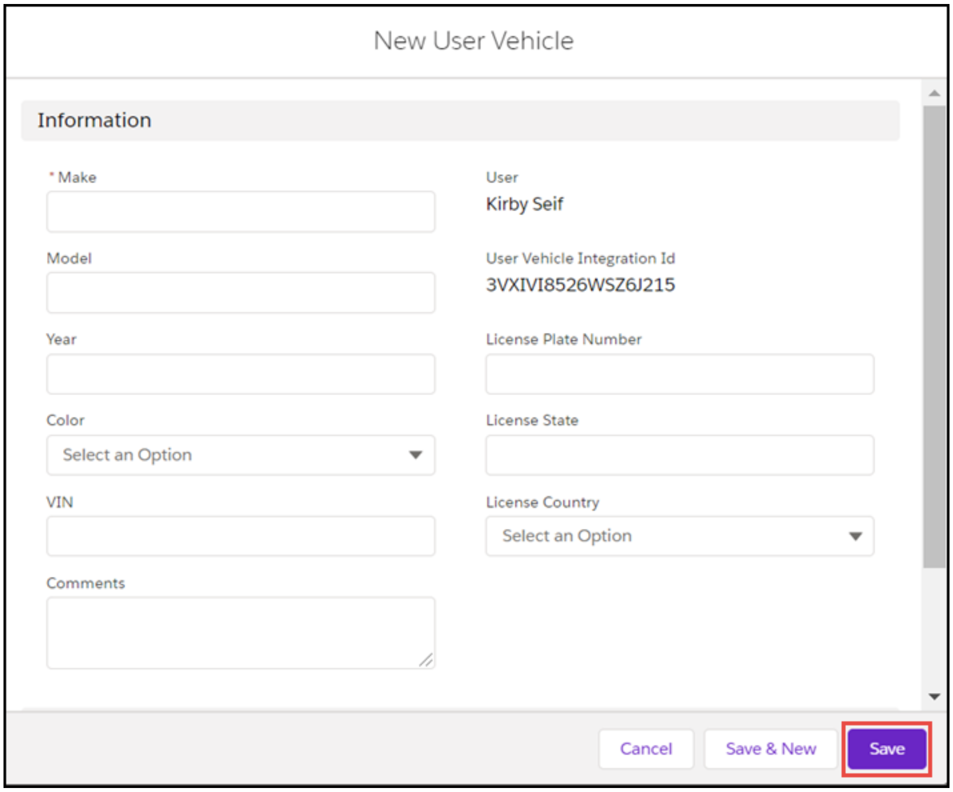
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Fleet** tab, scroll to the **Vehicles** section, and click **New**.



4. Enter vehicle information and click **Save**.



For information about the fields, see View User Information.

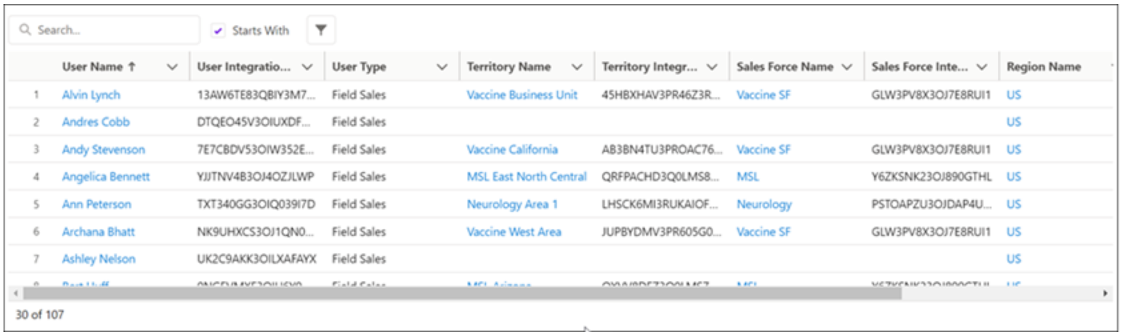
Add a Driver

You can add drivers to the user's profile.

To add a driver

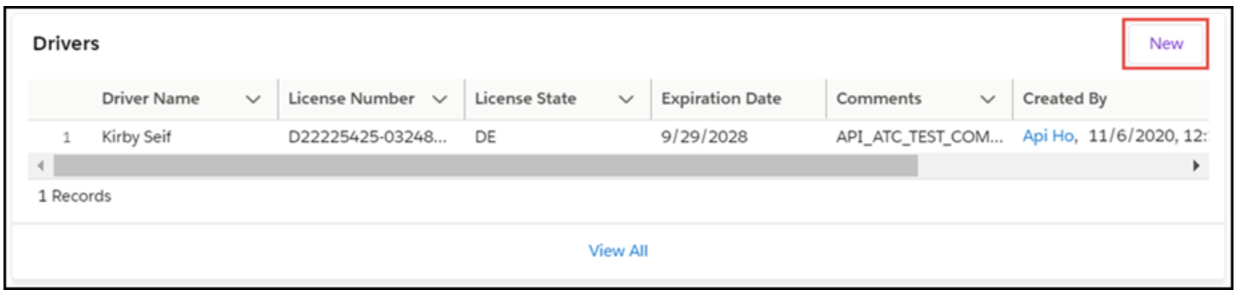
1. Click **Users** from the primary navigation bar.
2. Click the user whose profile you are adding a driver to.

> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.

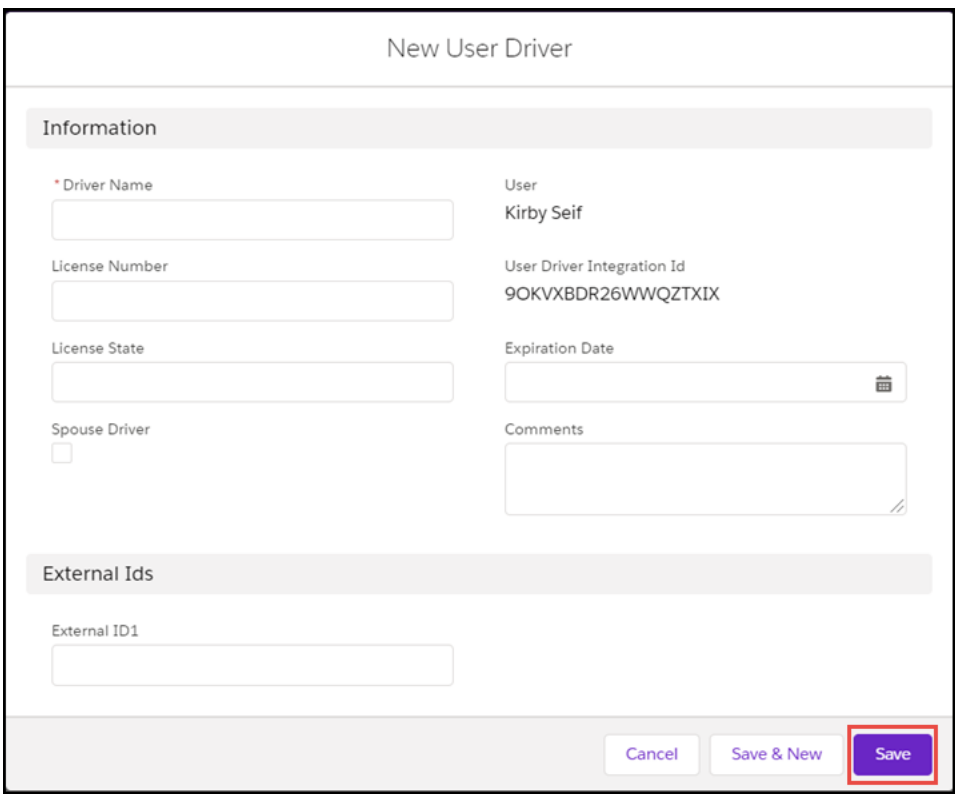


	User Name	User Integratio...	User Type	Territory Name	Territory Integr...	Sales Force Name	Sales Force Inte...	Region Name
1	Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2	Andres Cobb	DTQEO45V3OIUXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4	Angelica Bennett	YJJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ039I7D	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIOF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXCS3OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7	Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

3. Select the **Fleet** tab, scroll to the **Drivers** section, and click **New**.



4. Enter driver information and click **Save**.



For information about the fields, see View User Information.

Add an Accident or Incident Record

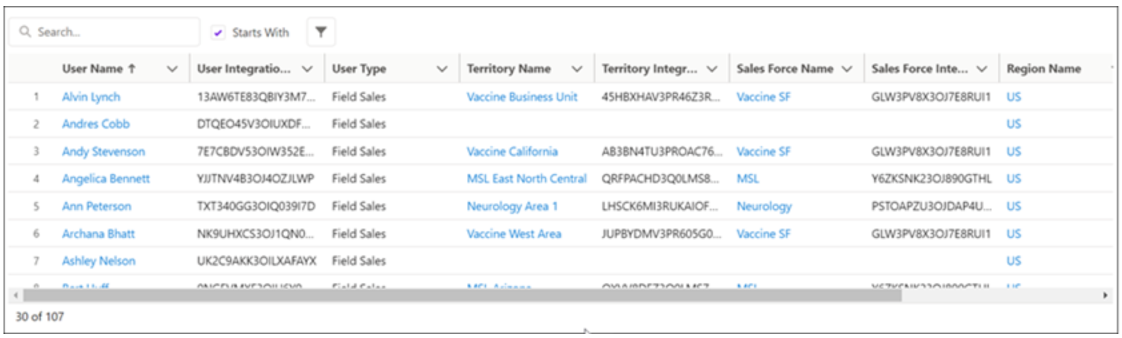
You can add accidents or incidents records involving the user or the user’s car to the user's profile.

To add an accident or incident record

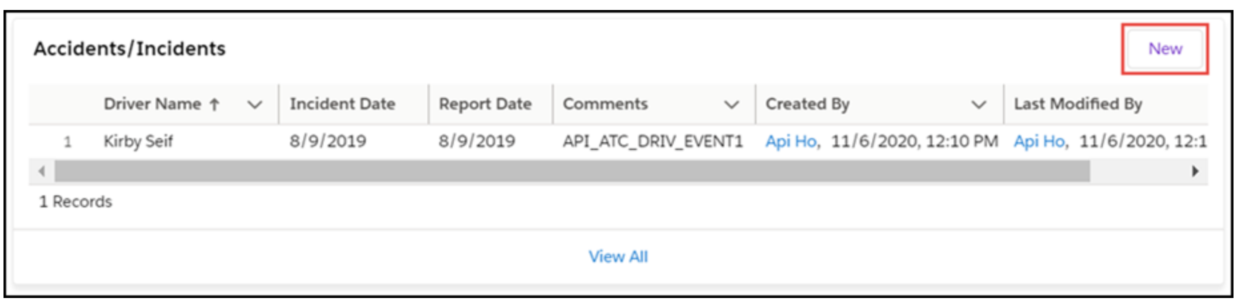
1. Click **Users** from the primary navigation bar.

2. Click the user whose profile you are adding an accident or incident record to.

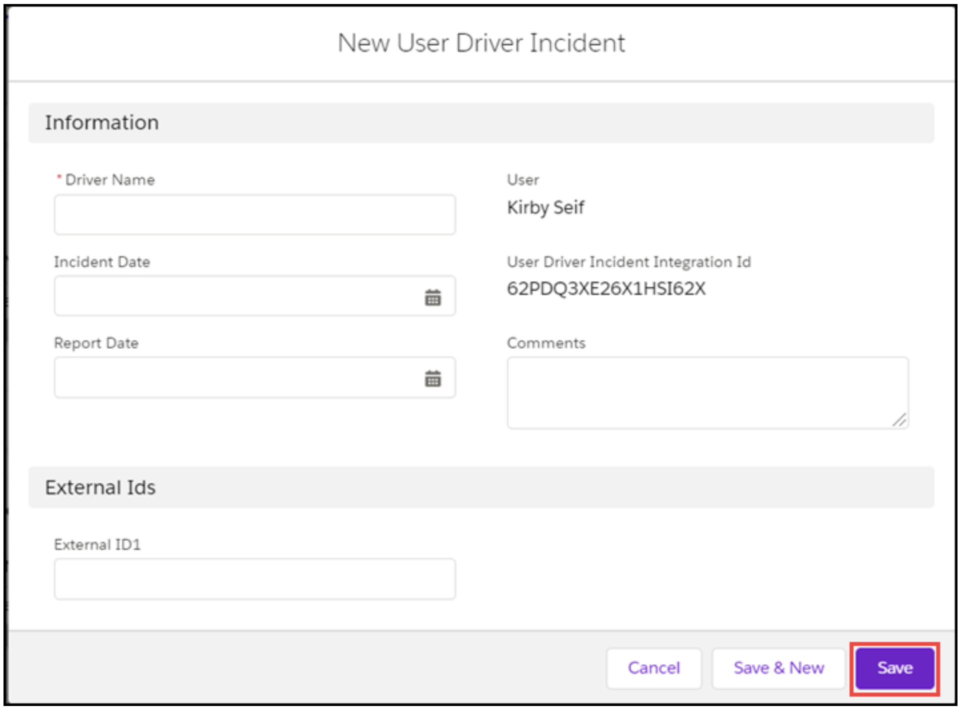
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Fleet** tab, scroll to the **Accidents/Incidents** section, and click **New**.



4. Enter accident or incident information and click **Save**.



For information about the fields, see View User Information.

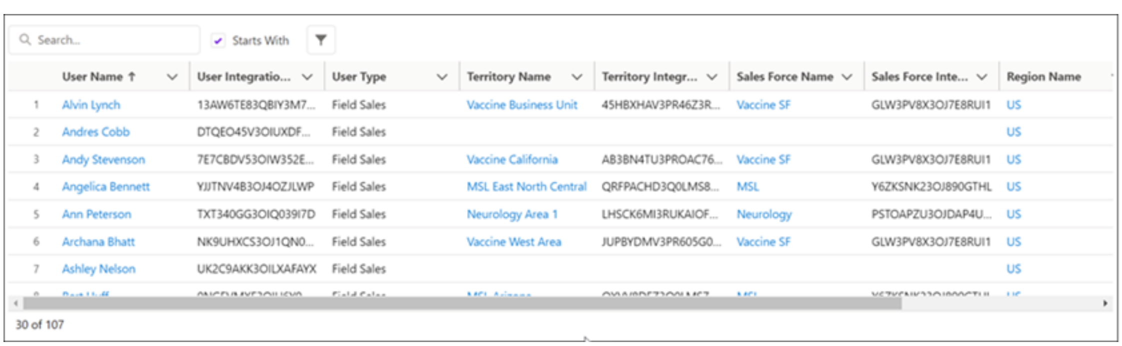
Modify Vehicle Information

You can make updates to vehicle information.

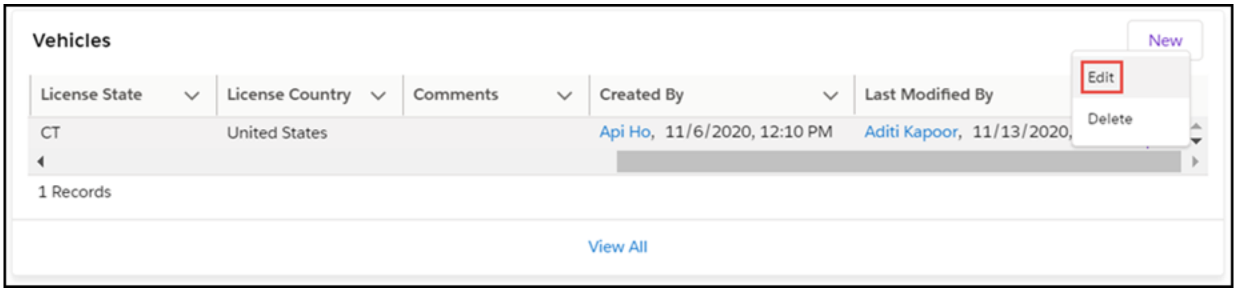
To edit vehicle information

1. Click **Users** from the primary navigation bar.
2. Click the user whose vehicle information you want to edit.

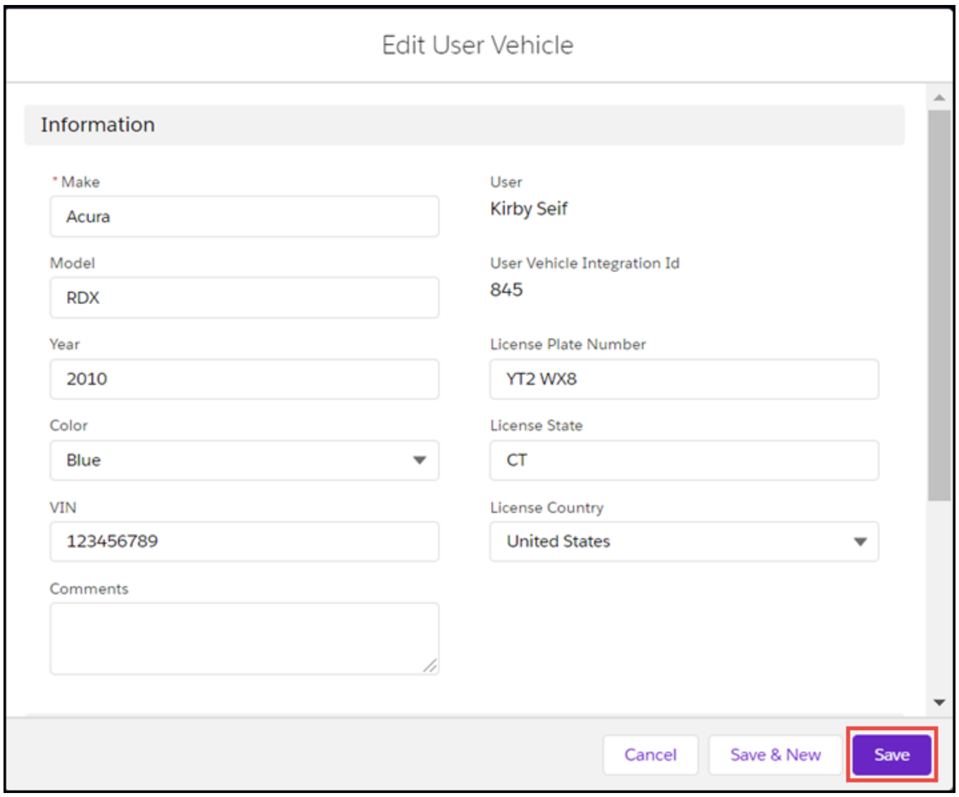
Note: Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Fleet** tab, scroll to the **Vehicles** section, click the drop-down for the vehicle record you want to edit, and select **Edit**.



4. Modify the vehicle information and click **Save**.



For information about the fields, see View User Information.

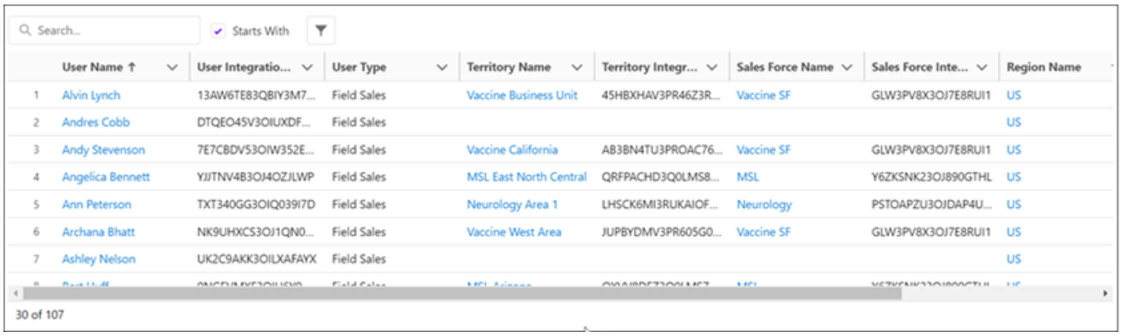
Modify Driver Information

You can make updates to driver information.

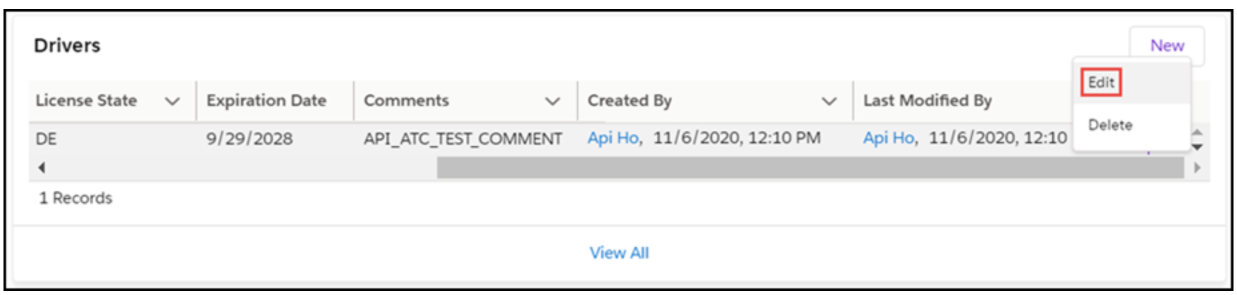
To edit driver information

1. Click **Users** from the primary navigation bar.
2. Click the user whose driver information you want to edit.

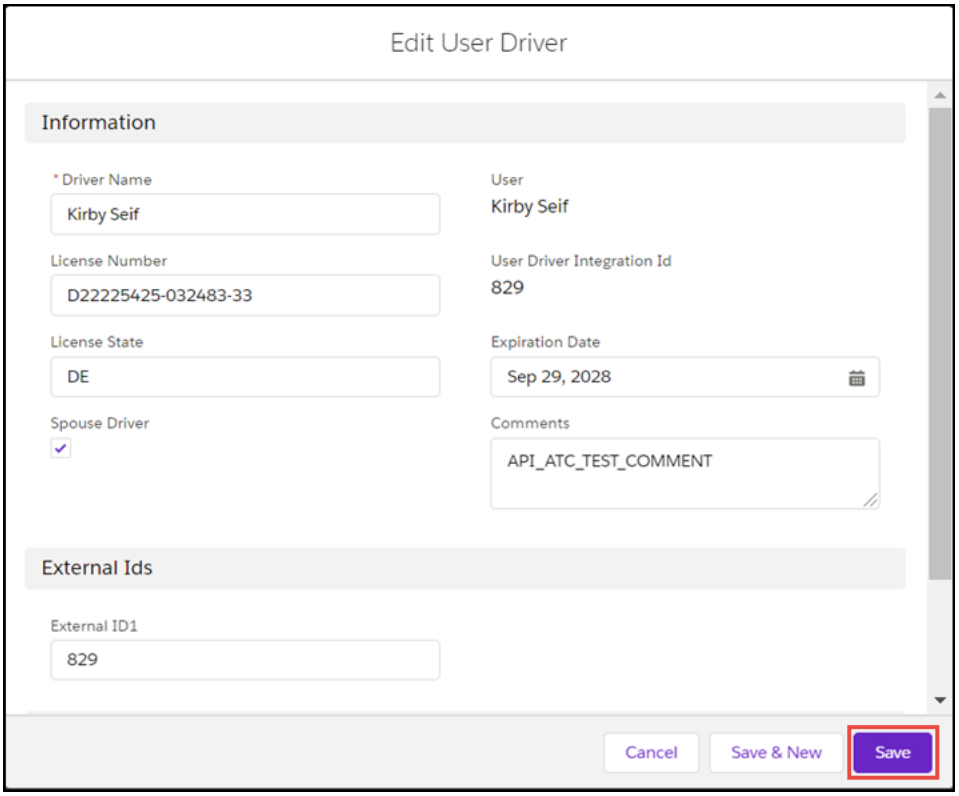
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions](#).



3. Select the **Fleet** tab, scroll to the **Drivers** section, click the drop-down for the driver record you want to edit, and select **Edit**.



4. Modify the driver information and click **Save**.



For information about the fields, see View User Information.

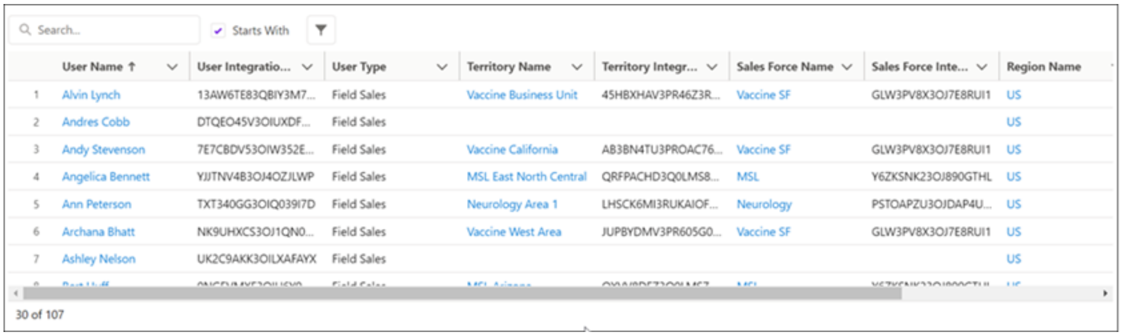
Modify an Accident or Incident Record

You can make updates to a user's accident or incident record.

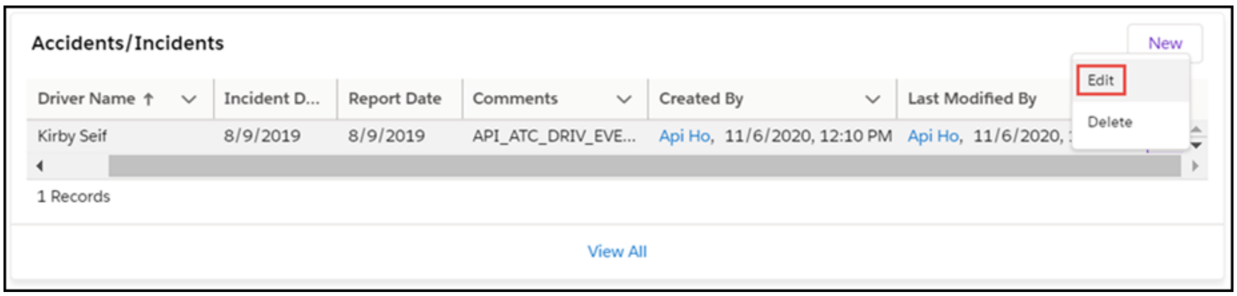
To edit an accident or incident record

1. Click **Users** from the primary navigation bar.
2. Click the user whose accident or incident information you want to edit.

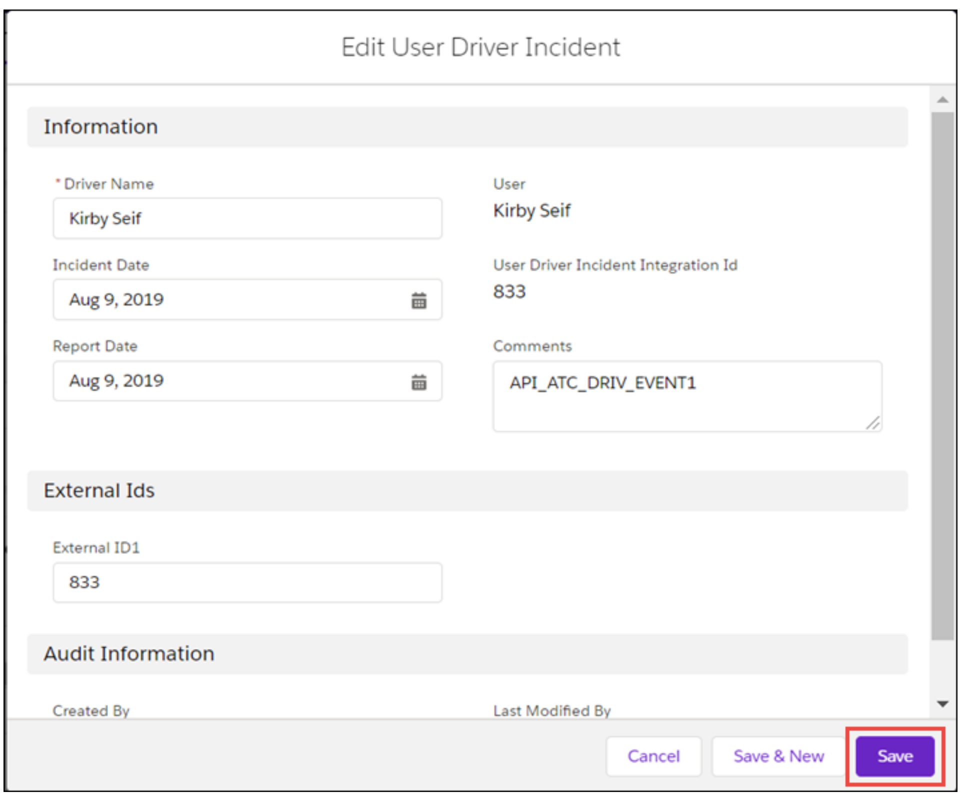
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Fleet** tab, scroll to the **Accidents/Incidents** section, click the drop-down for the accident or incident record you want to edit, and select **Edit**.



4. Modify the accident or incident record and click **Save**.



For information about the fields, see View User Information.

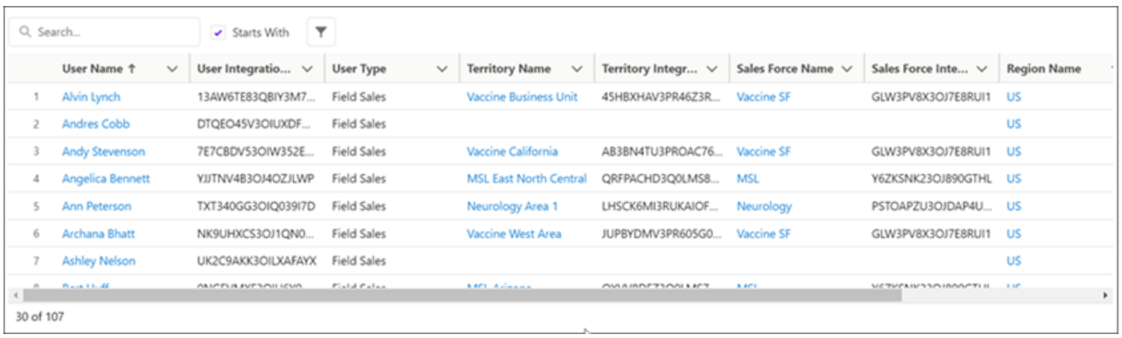
End Date (Delete) Vehicle Information

You can end date (delete) a user's vehicle information, so it is no longer active/valid as of the end date.

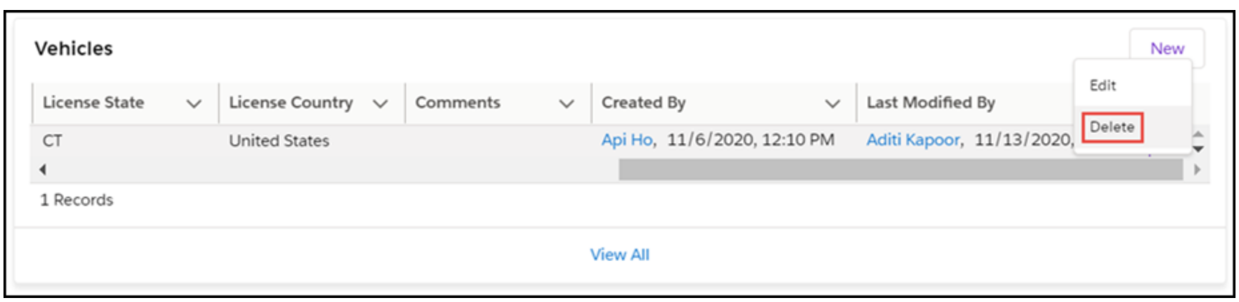
To end date vehicle information

1. Click **Users** from the primary navigation bar.
2. Click the user whose vehicle information you want to end date.

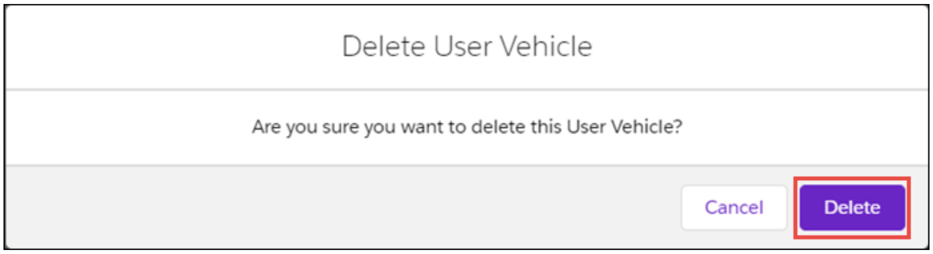
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Fleet** tab, scroll to the **Vehicles** section, click the drop-down for the vehicle record you want to delete, and select **Delete**.



4. Click **Delete** to confirm.



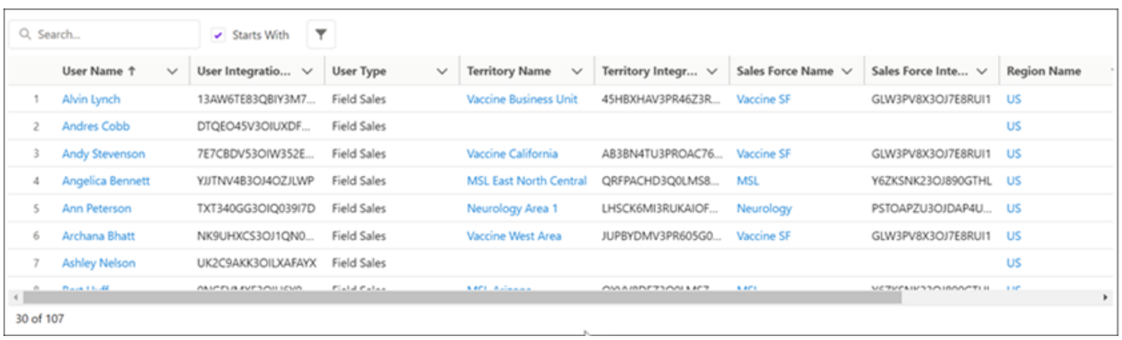
End Date (Delete) a Driver

You can end date drivers, so they are no longer active/valid as of the end date.

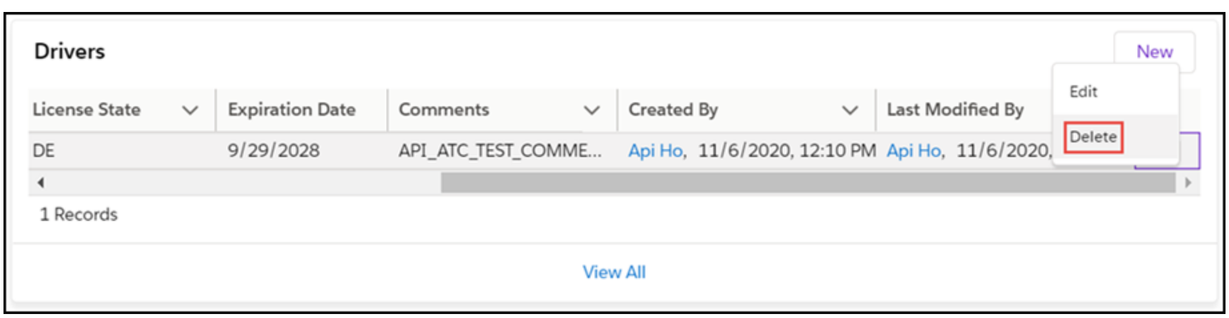
To end date a driver

1. Click **Users** from the primary navigation bar.
2. Click the user whose driver record you want to end date.

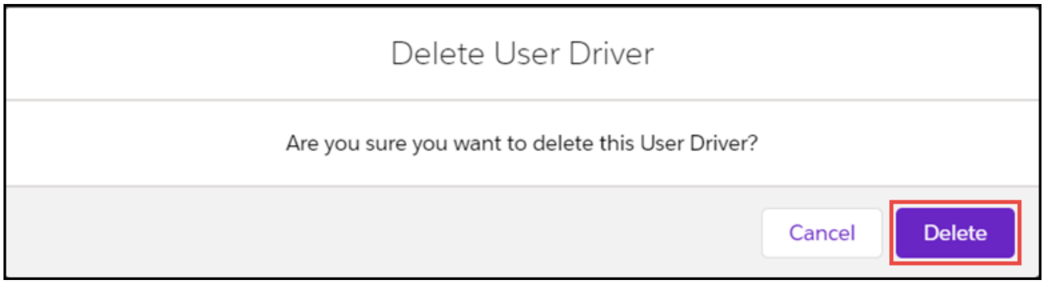
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Fleet** tab, scroll to the **Drivers** section, click the drop-down for the driver record you want to delete, and select **Delete**.



4. Click **Delete** to confirm.



End Date (Delete) an Accident or Incident Record

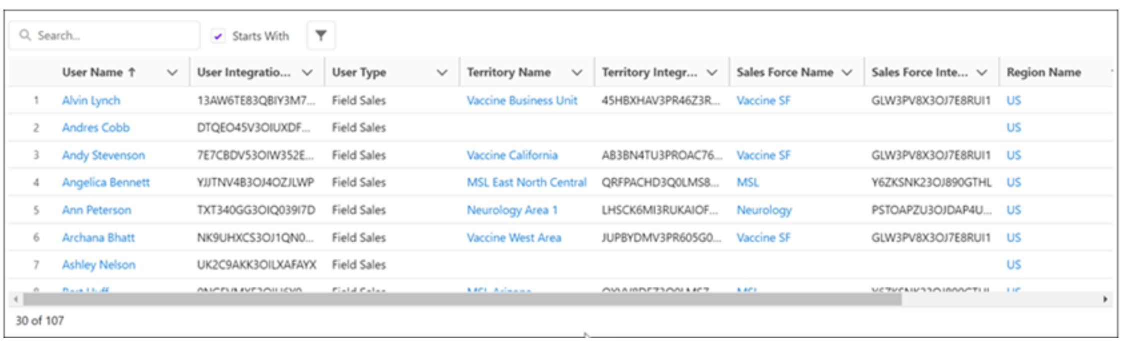
You can end date(delete) accident or incident records, so they are no longer active/valid as of the end date.

To end date an accident or incident record

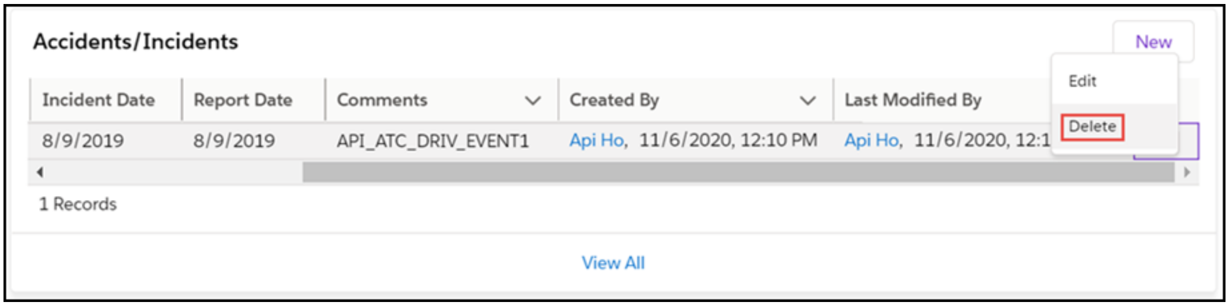
1. Click **Users** from the primary navigation bar.

2. Click the user whose accident or incident record you want to end date.

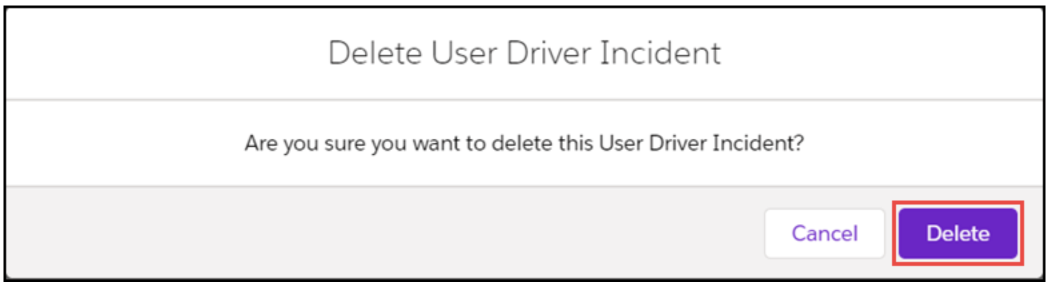
Note: Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



3. Select the **Fleet** tab, scroll to the **Accidents/Incidents** section, click the drop-down for the accident or incident record you want to delete, and select **Delete**.



4. Click **Delete** to confirm.



User Field Titles

User field titles, such as *Representative* or *Senior Representative* can be created and added to user profiles in the **Users** and **Territories** modules, as well as within **Scenario** user assignment. Field title functionality is used to maintain past and current field titles and for job changes or promotions.

Note: Field Title use is parameter-driven and is controlled by the system administrator.

See:

- Create a User Field Title
- Add a Field Title to a User
- Modify a User's Field Title
- Add a Field Title to a User via Territory
- Modify a User's Field Title via Territory

Add a Field Title to a User

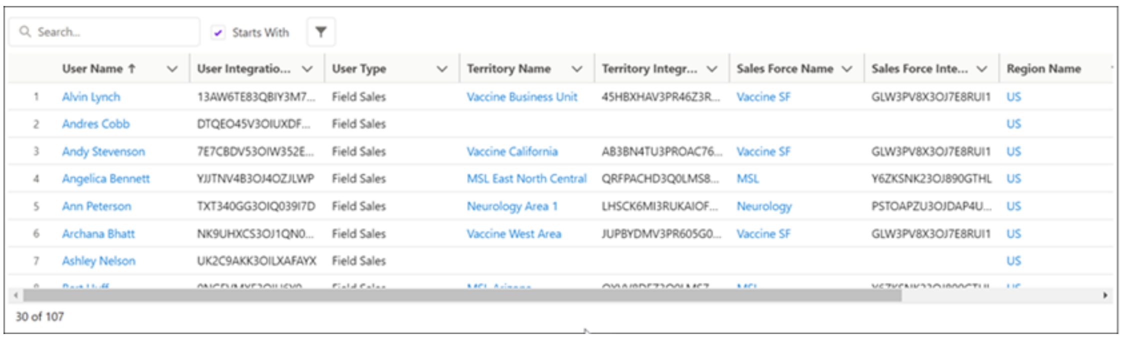
HO users can add a field title to a user. Users can only have one active field title at a time.

Note: Field Title use is parameter-driven and is controlled by the system administrator.

To add a field title to a user

1. Click **Users** from the primary navigation bar.
2. Click the user whose profile you are adding a field title to.

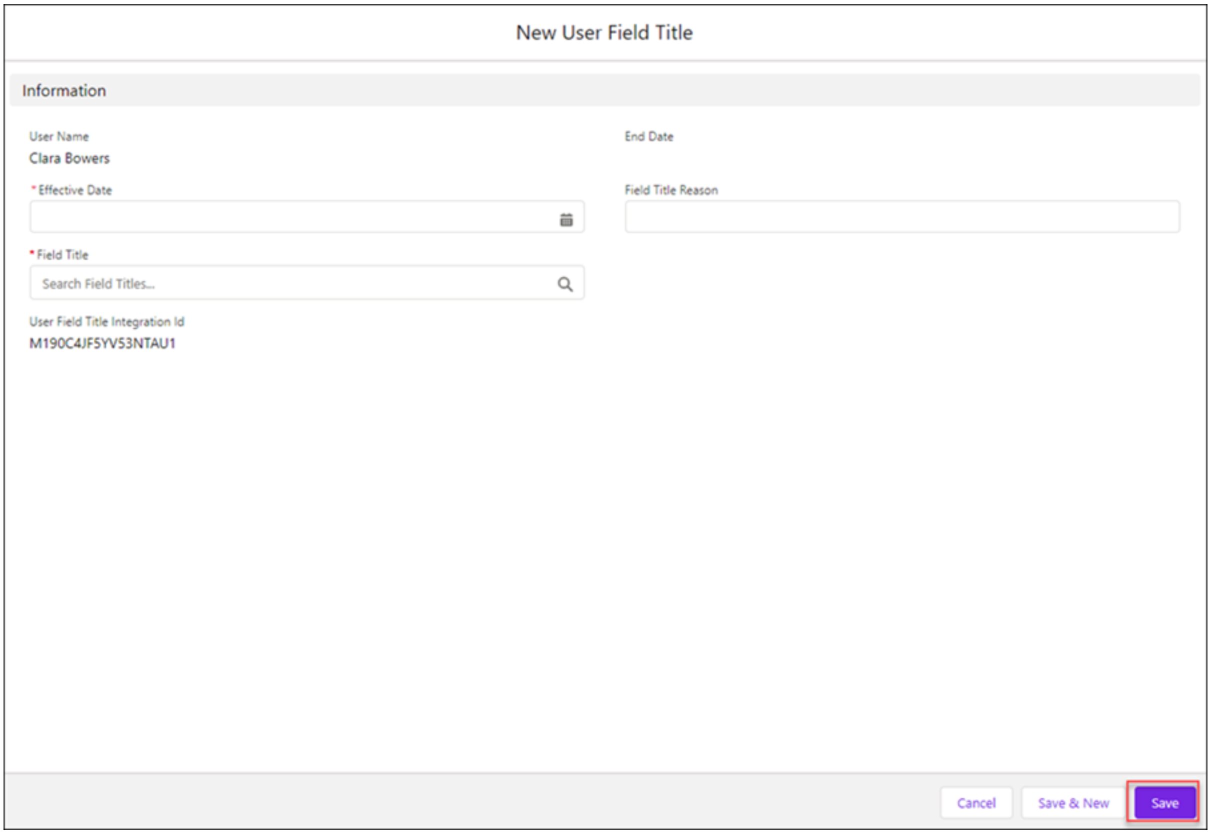
> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See Search and Filter Functions.



	User Name	User Integratio...	User Type	Territory Name	Territory Integr...	Sales Force Name	Sales Force Inte...	Region Name
1	Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2	Andres Cobb	DTQEO45V3OIUXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4	Angelica Bennett	YJJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ039I7D	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIOF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXCS3OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7	Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

3. From the **Details** tab, scroll to the **Field Titles** section and click **New**.

4. Enter field title information and click **Save**.



For information about the fields, see User Details Tab.

Modify a User's Field Title

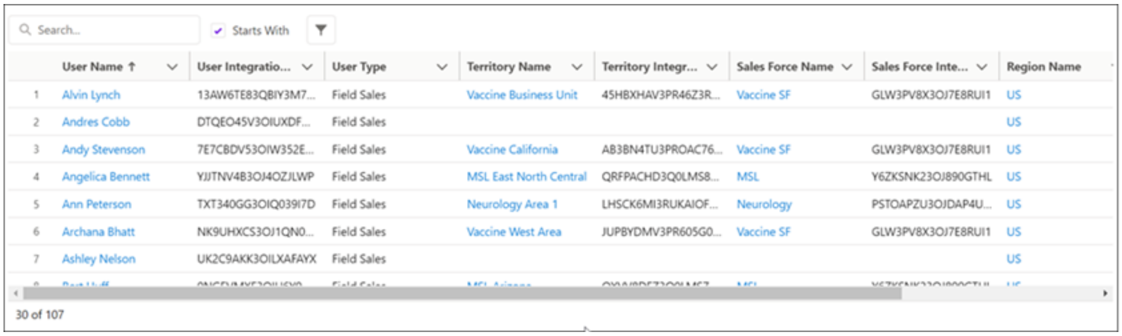
HO users can modify a user's field title.

Note: Field Title use is parameter-driven and is controlled by the system administrator.

To modify a user's field title

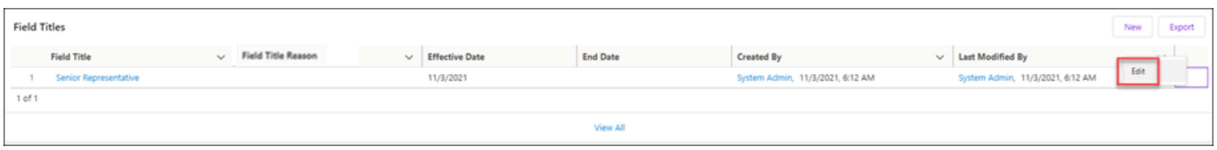
1. Click **Users** from the primary navigation bar.

2. Click the user whose field title you want to modify.



> **Note:** Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions](#).

3. From the **Details** tab, scroll to the **Field Titles** section, click the drop-down next to the existing field title, and click **Edit**.



4. Modify the **Effective Date**, **Field Title**, and/or **Field Title Reason**, then click **Save**.

For information about the fields, see [User Details Tab](#).

Add a Field Title to a User via Territory

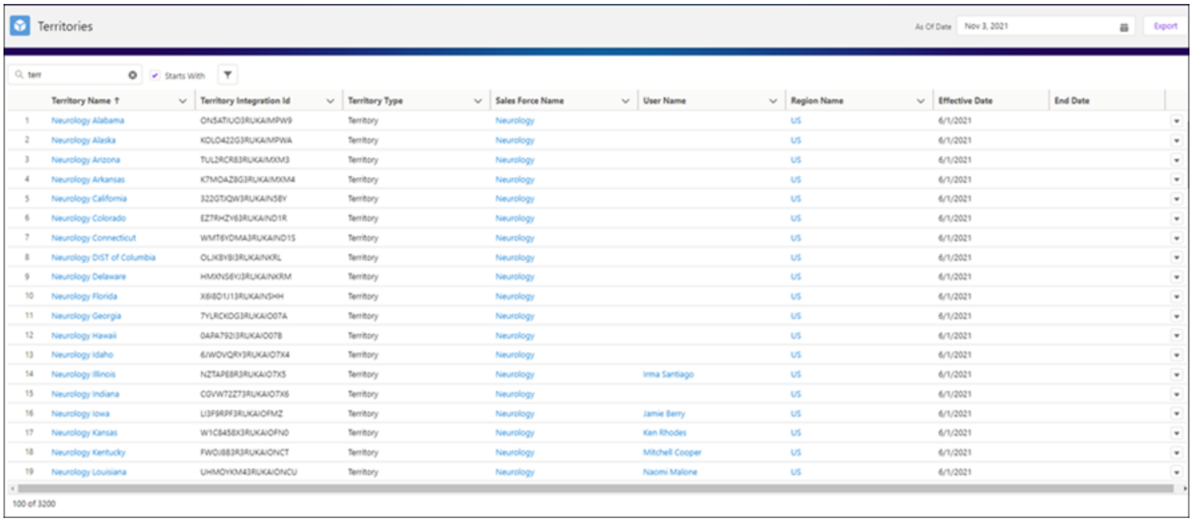
HO users can add a field title to a user through the user's assigned territory. Users can only have one active field title at a time.

> **Note:** Field Title use is parameter-driven and is controlled by the system administrator.

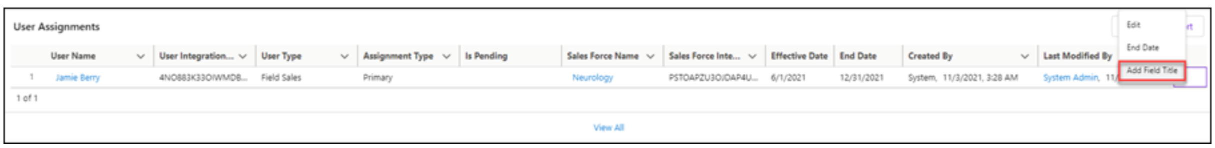
To add a field title to a user via territory

1. Click **Territories** from the primary navigation bar.

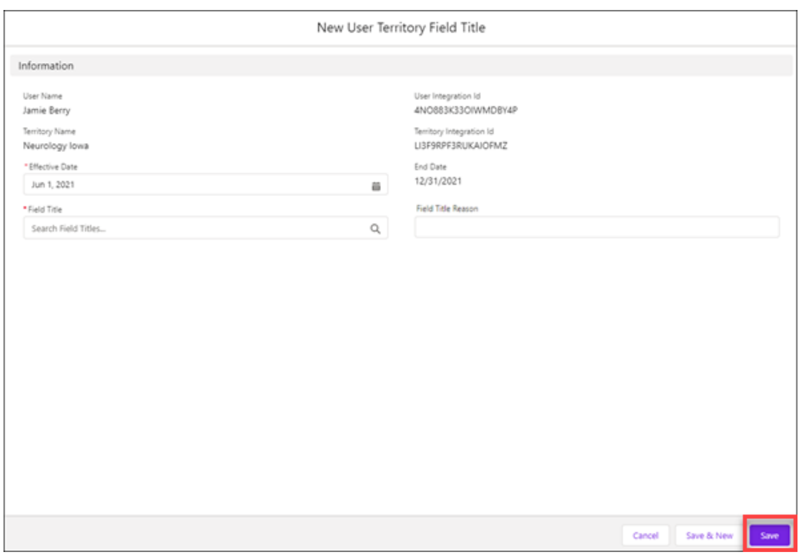
2. Select the territory that contains the user to which you want to add a field title.



3. From the **Details** tab, scroll to the **User Assignment** section, click the drop-down next to the user assignment, and click **Add Field Title**.



4. Enter the field title information, then click **Save**.



The field title is assigned to the user.

For information about the fields, see User Details Tab.

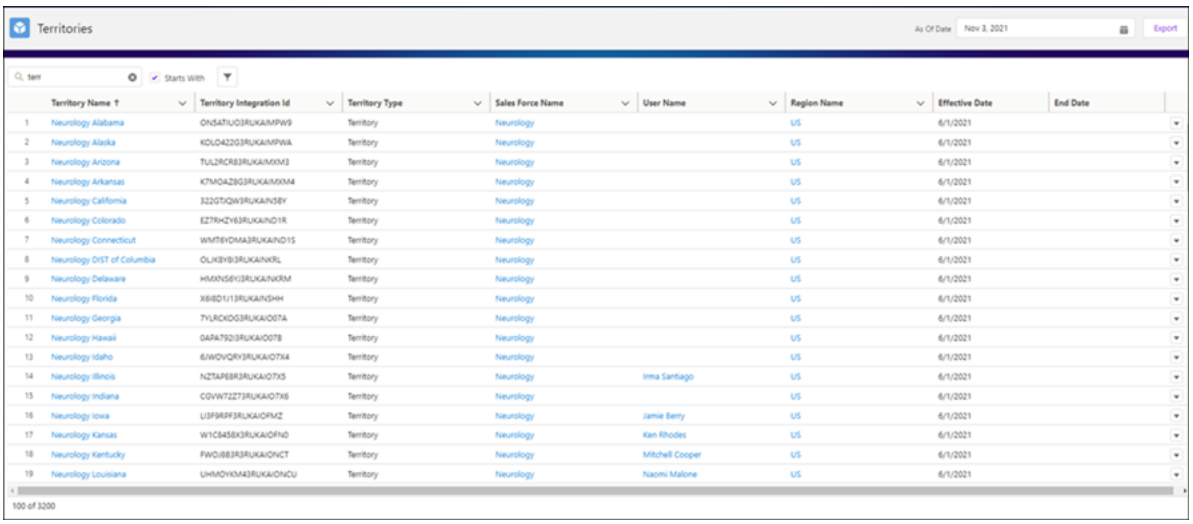
Modify a User's Field Title via Territory

HO users can modify a user field title through Territories.

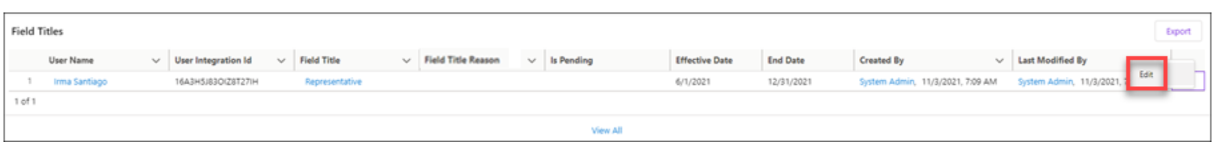
Note: Field Title use is parameter-driven and is controlled by the system administrator.

To modify a user territory field title

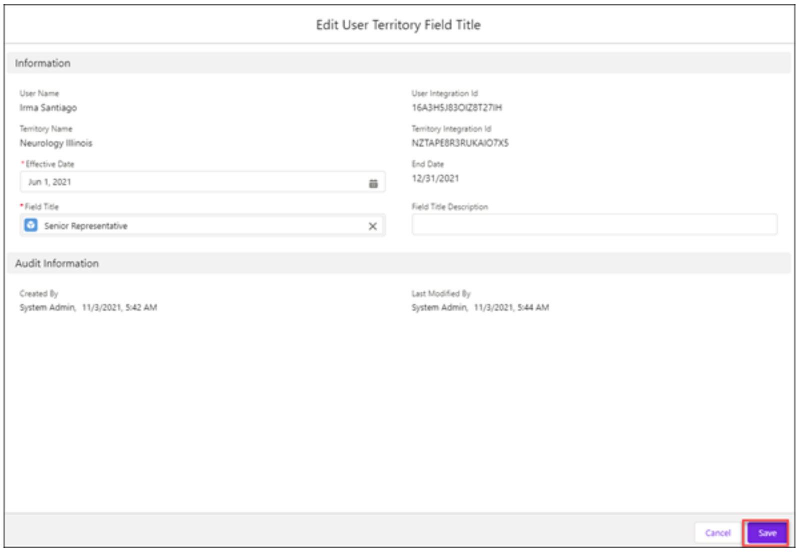
1. Click **Territories** from the primary navigation bar.
2. Select the territory that contains the field title you want to change.



3. From the **Details** tab, scroll to the **Field Titles** section, click the drop-down next to the existing field title, and click **Edit**.



4. Modify the **Effective Date**, **Field Title**, and/or **Field Title Reason**, then click **Save**.



For information about the fields, see Territory Details Tab.

Manage Geographies

In Optimizer, a Geography represents an area grouped together with a Geography code such as Cities, States, Postal Areas, and Bricks. Usually, geographies are added so they can be aligned to a territory.

- A **Postal Area** is a Geography type used to maintain postal codes, which are associated with addresses. In the United States, the postal code is the zip code.
- A **Brick** is a predefined geographical segmentation that enables companies to assign customers to territories when postal codes are not available and to anonymize sales data. The Brick structure is used in many European countries.

See:

- View Geography InformationView Geography Information
- Geography CreationGeography CreationGeography CreationGeography Creation
- Import Geography Data Using CSV Files
- Geography Parent Hierarchies
- Geography Child Hierarchies

View Geography Information

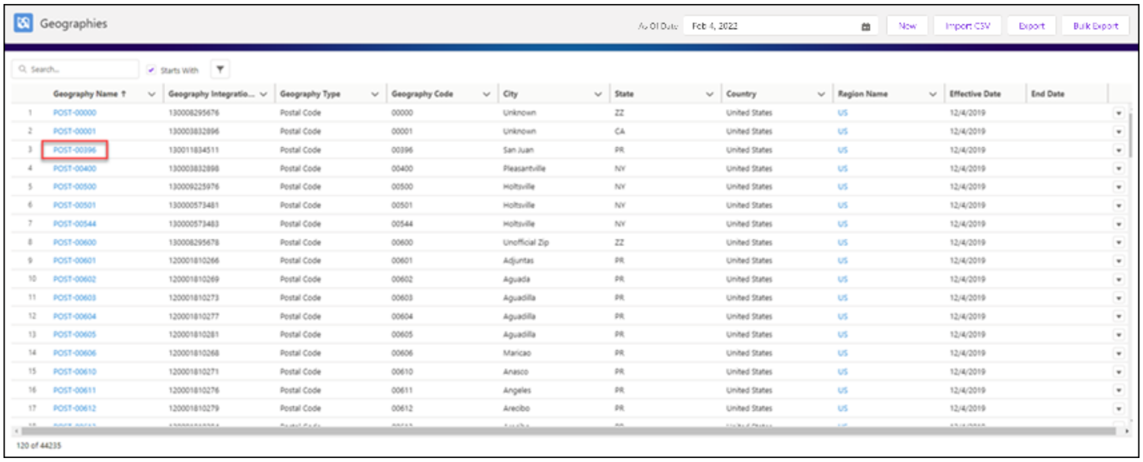
The **Geographies** module displays general information about the geography, geography alignments, parent and child links, audit information, external IDs, the history of changes made to the geography, and the hierarchical structure of the geography.

Geography information listed on the main list page is based on the **As Of Date** field.

To view Geography information

1. Click **Geographies** from the primary navigation bar.
2. From the Geographies screen, select the geography you would like to view.

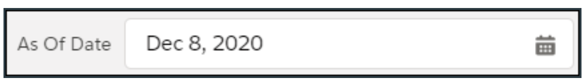
> **Note:** Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.



3. View the geography's information.

   The Geography Name, As Of Date, actions available for the Geography entity, and the Geography highlight section are displayed on the top of the Geography entity page for all the Geography tabs.

   ### As Of Date and Actions

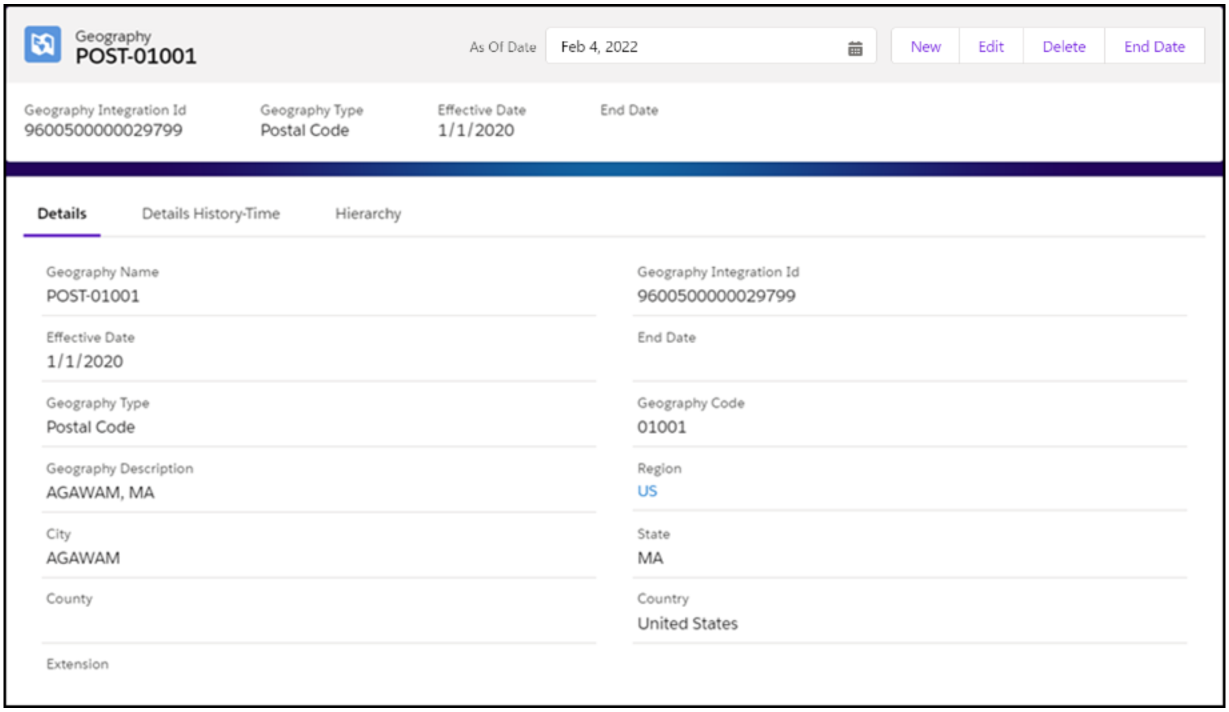
   - **As Of Date**: The data displayed for the geography is based on the date selected in this field.
   - **Edit**: If applicable, click to make modifications to the geography information.
   - **Delete**: If applicable, click to remove the geography from system.
   - **End Date**: If applicable, click to end date a geography, so it is no longer active/valid as of this date.

   ### Highlight Section

   - **Geography Name**: Name of the geography.
   - **Geography Integration ID**: Unique geography identification number.

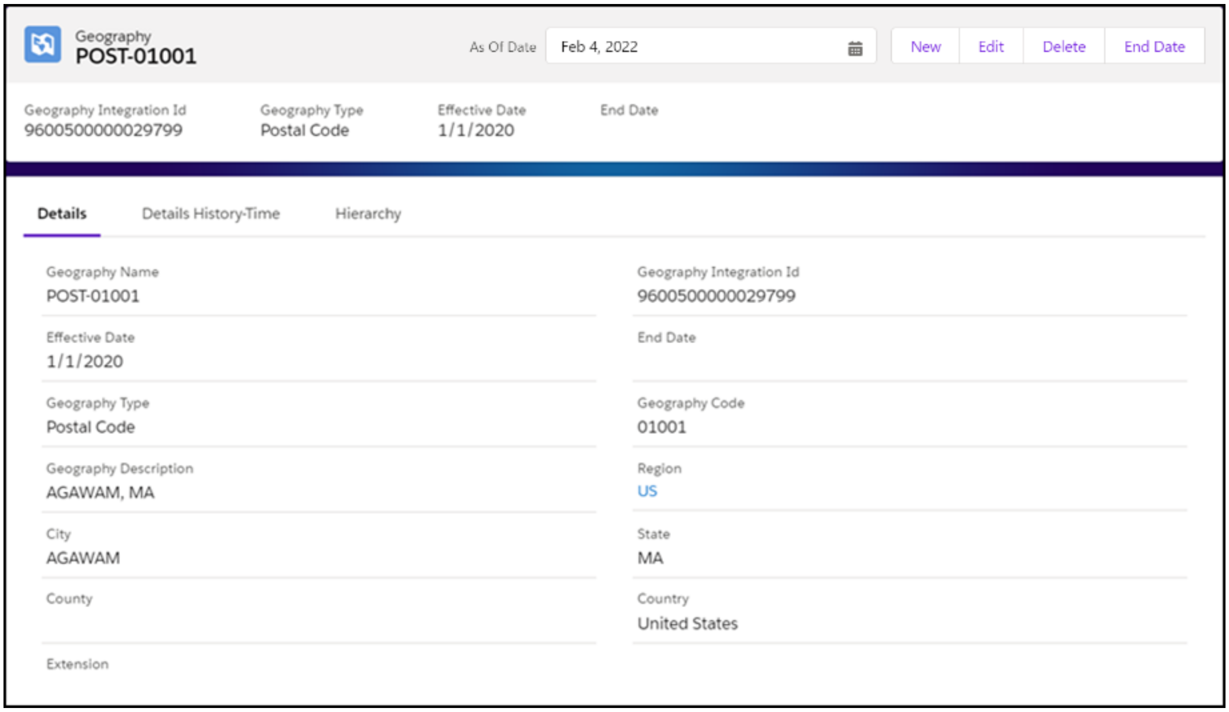
- **Effective Date**: Indicates the date when the geography is active/valid.
- **End Date**: Indicates the date after which the geography is no longer active/valid.



Geography Details Tab

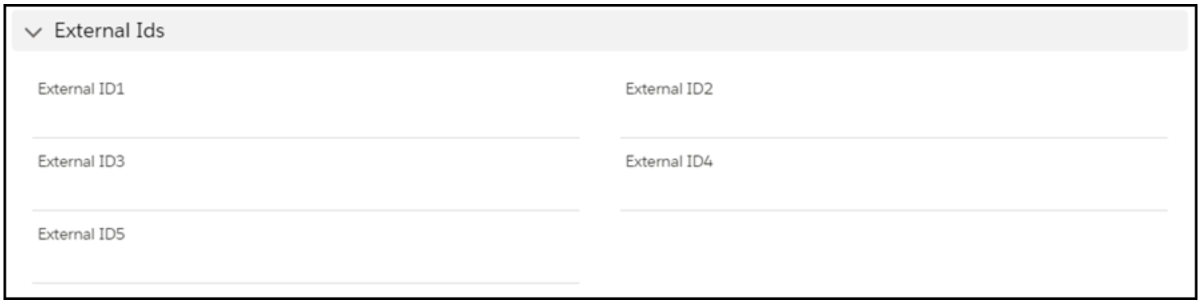
The **Details** tab contains general information about the geography, geography alignments, region parent and child links, audit information, and external IDs. The data displayed is the current view based on the As Of Date.

General Information



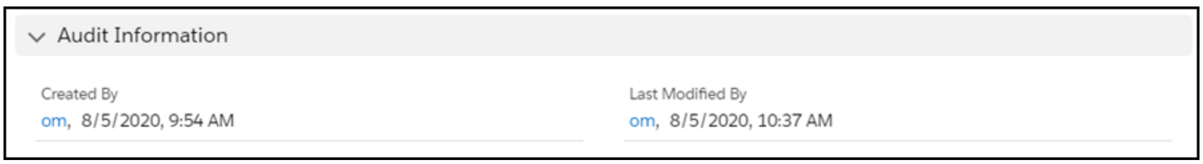
- **Geography Name**: Name of the geography. Concatenated Geography Type + Geography Code.
- **Geography Integration ID**: Unique geography identification number.
- **Effective Date**: Indicates the date when the geography is active/valid.
- **End Date**: Indicates the date after which the geography is no longer active/valid.
- **Geography Type**: The type or level of geography, such as postal code, brick, or micro brick.
- **Geography Code**: The code or ID for the specific geography, such as postal code 10001 for New York City.
- **Description**: Description of the geography.
- **Region**: The region the geography is linked to.
- **City**, **State**, **County**, and **Country**: Specify location information for the Geography.
- **Extension**: Postal code extension.

External IDs



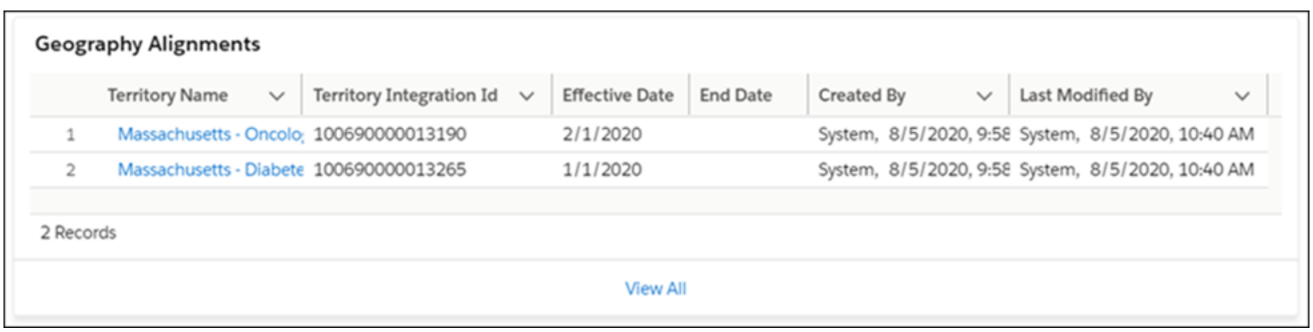
- **External ID1—ID5**: Additional identification numbers for cross referencing.

Audit Information



- **Created By**: A combination of the creator's user name and the date/time the geography was created.
- **Last Modified By**: A combination of the user name of the last person to edit the geography and the date/time it was updated.

Geography Alignments


Geography Alignments

	Territory Name	Territory Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Massachusetts - Oncolo	100690000013190	2/1/2020		System, 8/5/2020, 9:58	System, 8/5/2020, 10:40 AM
2	Massachusetts - Diabete	100690000013265	1/1/2020		System, 8/5/2020, 9:58	System, 8/5/2020, 10:40 AM

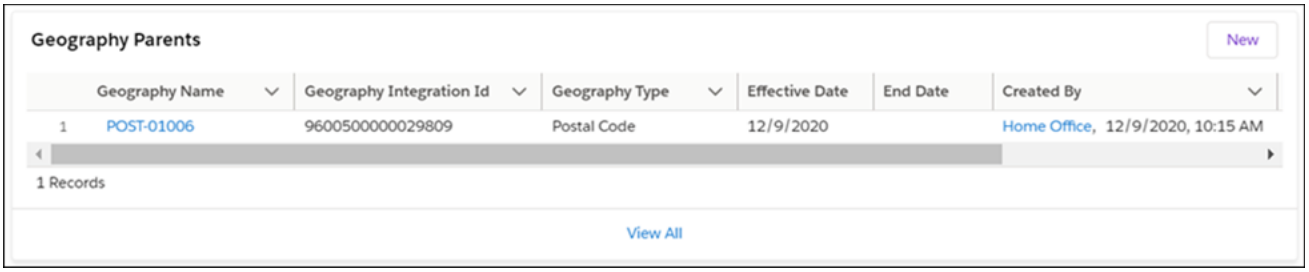
2 Records

View All

- **Territory Name**: The name of the territory which the geography is assigned to and from which the alignment is being created.
- **Territory Integration ID**: Unique territory identification number.
- **Effective Date**: Indicates the date when the alignment is active/valid.
- **End Date**: Indicates the date after which the alignment is no longer active/valid.

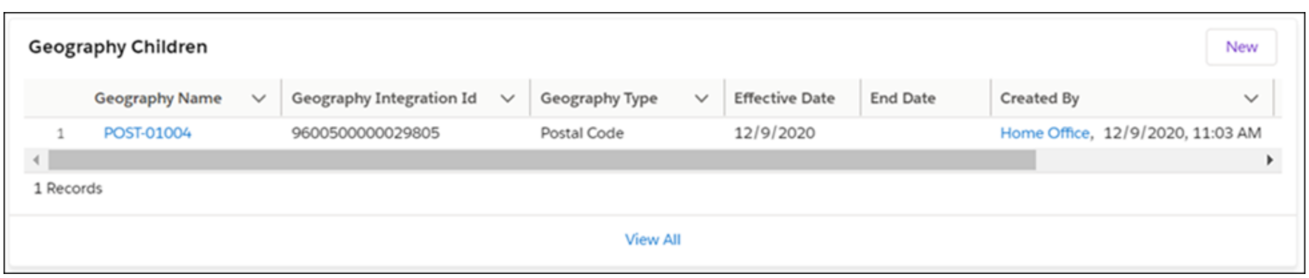
- **Created By**: A combination of the creator's user name and the date/time the geography alignment was created.
- **Last Modified By**: A combination of the user name of the last person to edit the geography alignment and the date/time it was updated.

Geography Parents



- **Geography Name**: The name of the parent geography.
- **Geography Integration ID**: Unique geography identification number.
- **Geography Type**: The type or level of geography, such as postal code, brick, or micro brick.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the parent geography was created.
- **Last Modified By**: A combination of the user name of the last person to edit the parent geography and the date/time it was updated.

Geography Children



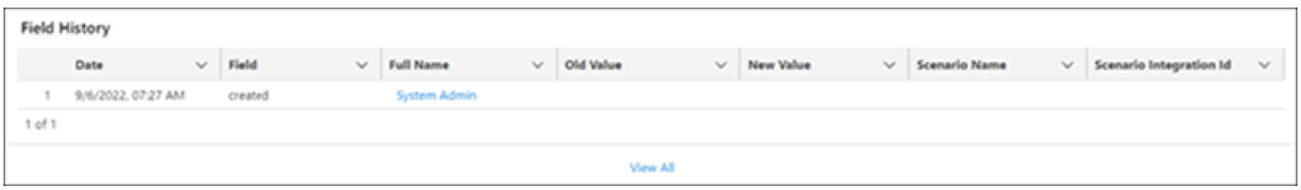
- **Geography Name**: The name of the child geography.
- **Geography Integration ID**: Unique geography identification number.

- **Geography Type**: The type or level of geography, such as postal code, brick, or micro brick.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the child geography was created.
- **Last Modified By**: A combination of the user name of the last person to edit the child geography and the date/time it was updated.

Geography Details History-Time Tab

The **Details History-Time** tab displays the same information as the **Details** tab, except it shows all past, current, and future views of geography details. This tab also displays the audit history of key fields.

Field History



Field History

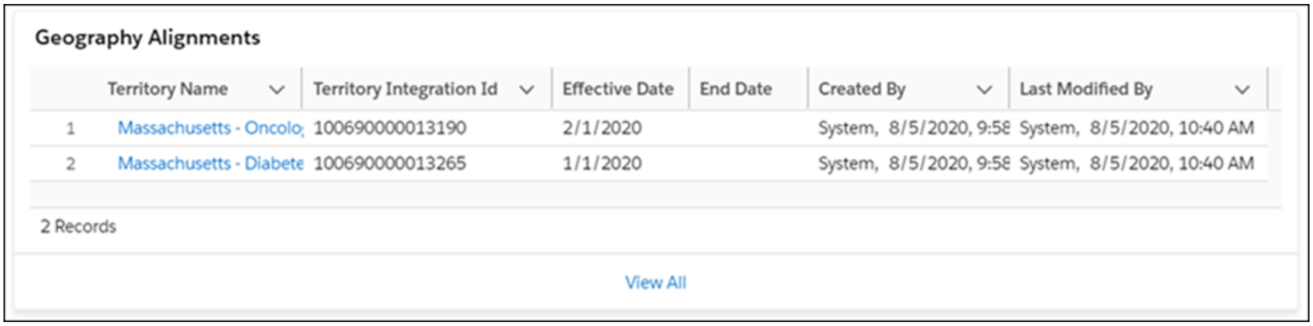
	Date	Field	Full Name	Old Value	New Value	Scenario Name	Scenario Integration Id
1	9/6/2022, 07:27 AM	created	System Admin				

1 of 1

View All

- **Date**: The date and time the change was made.
- **Field**: The name of the field that was modified.
- **Full Name**: The user name of the person who modified the field.
- **Old Value**: The previous value of the field.
- **New Value**: The updated value of the field.
- **Scenario Name**: The scenario associated with the field modification.
- **Scenario Integration Id**: The scenario integration identification number associated with the field modification.

Geography Alignments



Geography Alignments

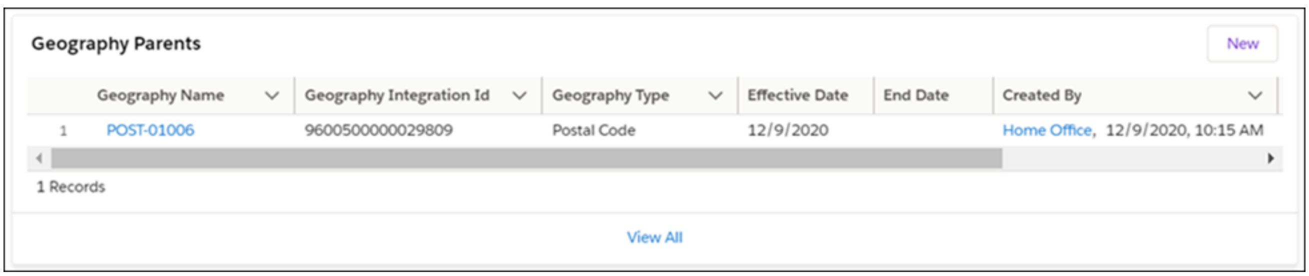
	Territory Name	Territory Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Massachusetts - Oncolo;	100690000013190	2/1/2020		System, 8/5/2020, 9:58	System, 8/5/2020, 10:40 AM
2	Massachusetts - Diabete	100690000013265	1/1/2020		System, 8/5/2020, 9:58	System, 8/5/2020, 10:40 AM

2 Records

View All

For a description of the fields displayed in the **Geography Alignments** section, see **Geography Alignments** in Geography Details Tab.

Geography Parents



Geography Parents New

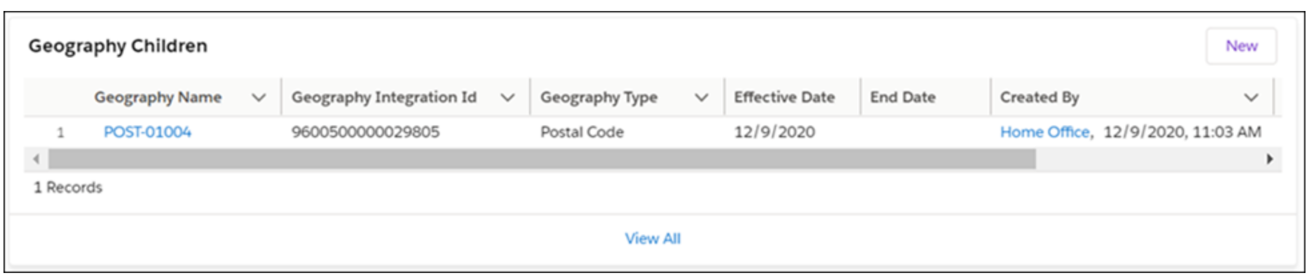
	Geography Name	Geography Integration Id	Geography Type	Effective Date	End Date	Created By
1	POST-01006	9600500000029809	Postal Code	12/9/2020		Home Office, 12/9/2020, 10:15 AM

1 Records

View All

For a description of the fields displayed in the **Geography Parents** section, see the **Geography Parents** section in Geography Details Tab.

Geography Children



Geography Children New

	Geography Name	Geography Integration Id	Geography Type	Effective Date	End Date	Created By
1	POST-01004	9600500000029805	Postal Code	12/9/2020		Home Office, 12/9/2020, 11:03 AM

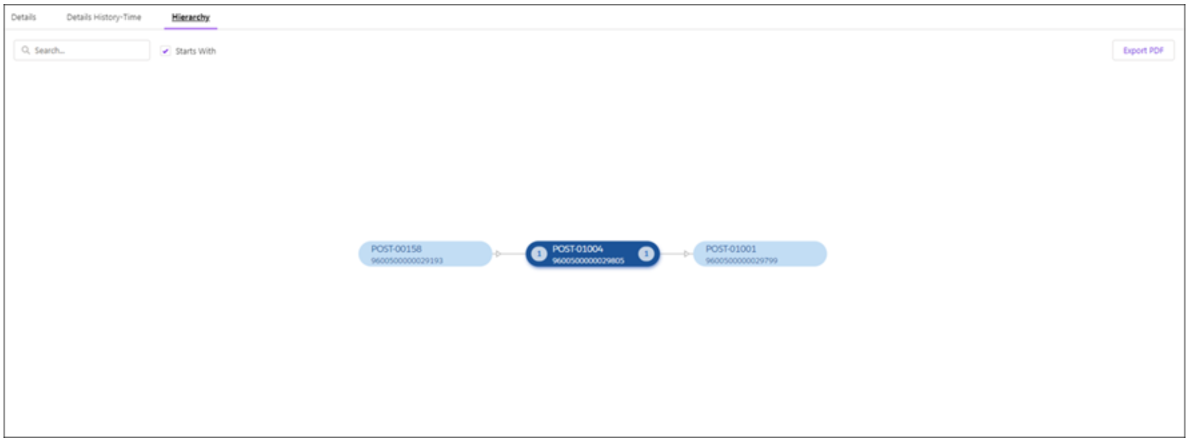
1 Records

View All

For a description of the fields displayed in the **Geography Children** section, see the **Geography Children** section in Geography Details Tab.

Geography Hierarchy Tab

The **Geography Hierarchy** tab displays the parent-child hierarchy in a pictorial form. The data displayed is based on the **As Of Date** field.



The hierarchy diagram displays the selected geography in the middle. If the geography has parent geographies linked to it, they are displayed to the left. If the geography has child geographies linked to it, they are displayed to the right.

Each node contains the geography name and integration ID. If the geographies have parent and child geographies linked to them, the node changes from light blue to dark blue when expanded. The total number of linked parent/child geographies are displayed in the node (parent number is on the left and child number is on the right).

To view the details of a geography, click the geography name in the node.

To export hierarchy chart results to a PDF file, click **Export PDF**.

Geography Creation

For each new geography, you can enter general information for the geography (such as a description that identifies the geography), the external IDs associated with the geography, the effective and end dates of the geography, and the default country for the geography.

See:

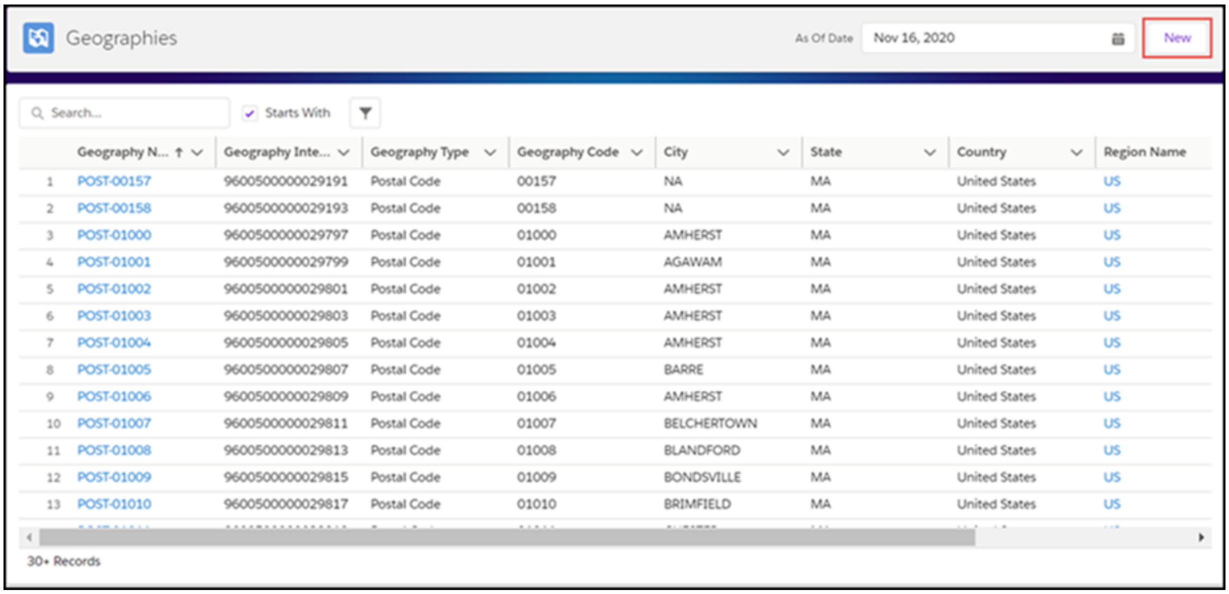
- Add a Geography
- Modify a Geography
- Delete a Geography
- End Date a Geography

Add a Geography

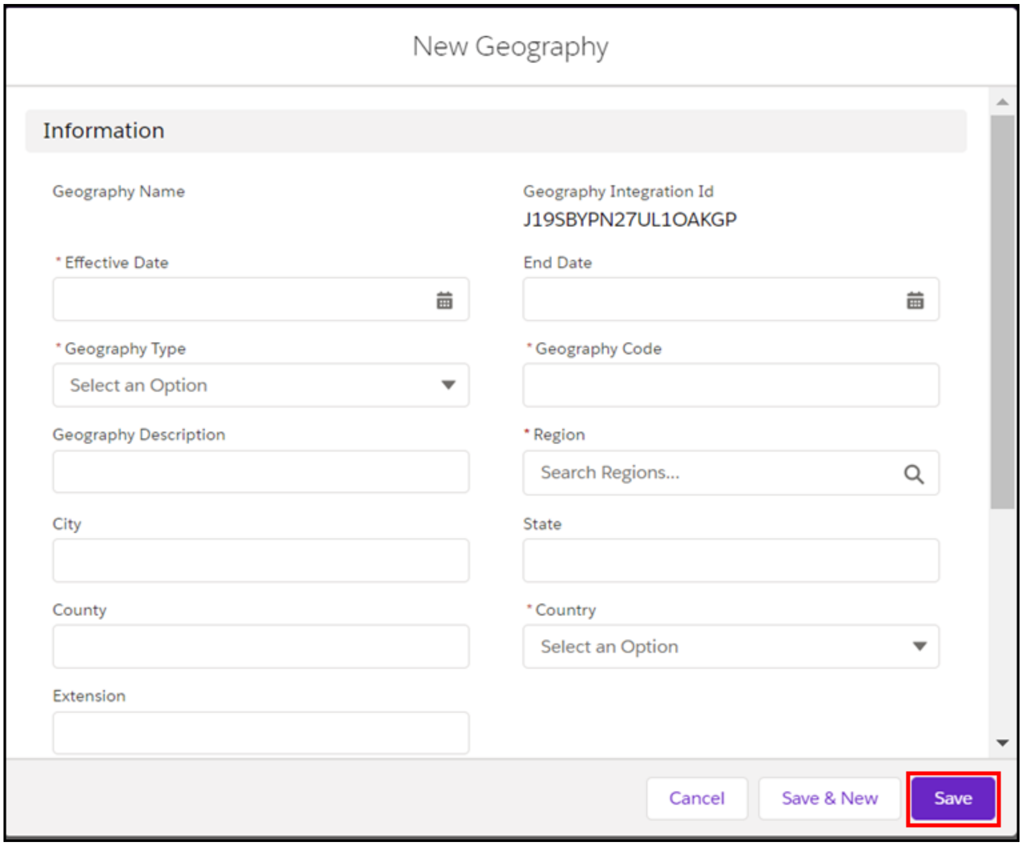
For each new Geography, you can enter general information (such as the code and description that identify the Geography) and any postal codes associated with the Geography.

To add a geography

1. Click **Geographies** from the primary navigation bar.
2. From the Geographies page, click **New**.



3. Enter information for the new geography and click **Save**.



For information about the fields, see View Geography Information.

Modify a Geography

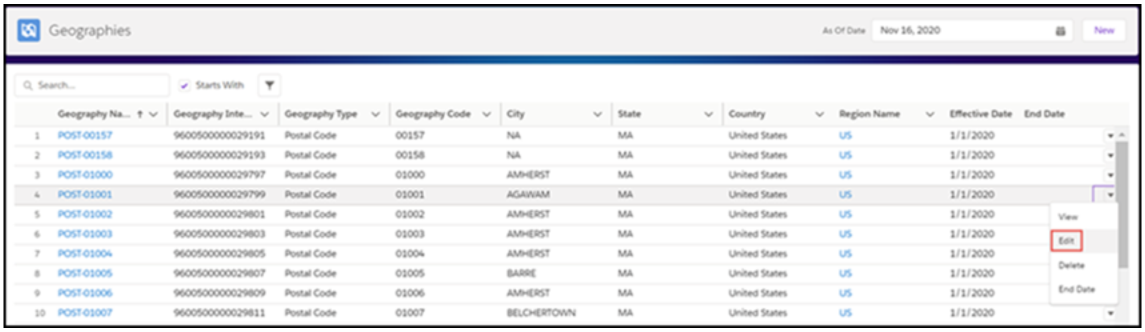
You can make updates to the information of an existing geography.

To edit a geography

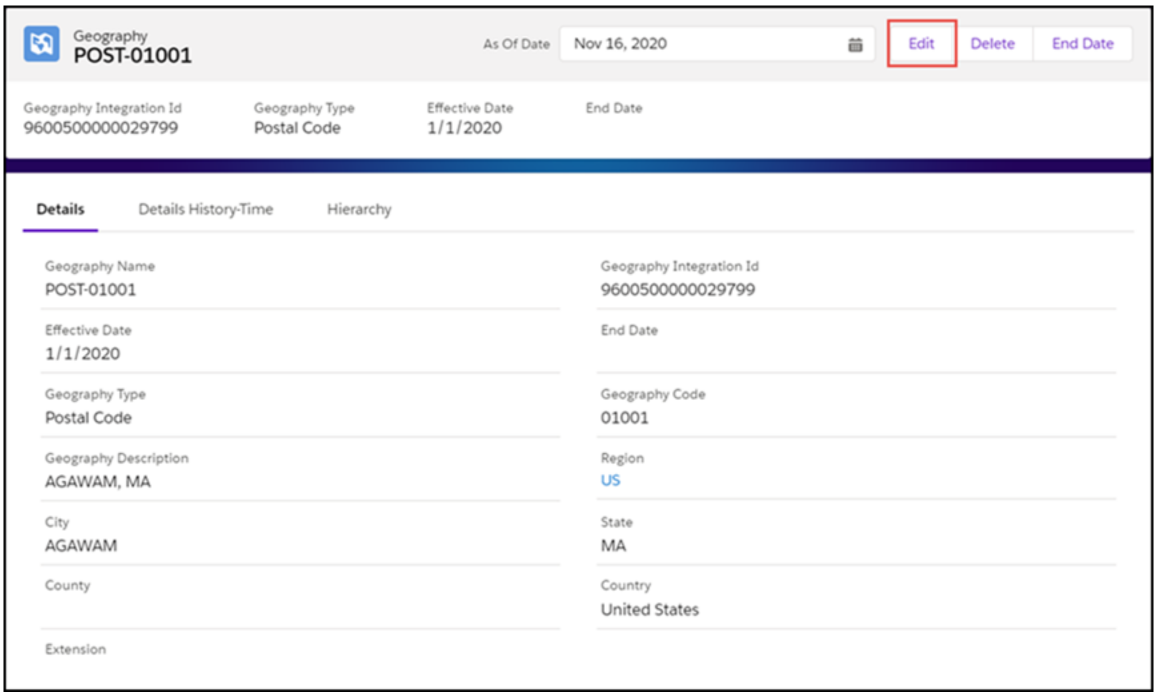
1. Click **Geographies** from the primary navigation bar.
2. After you find the geography, do one of the following:

> **Note:** Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.

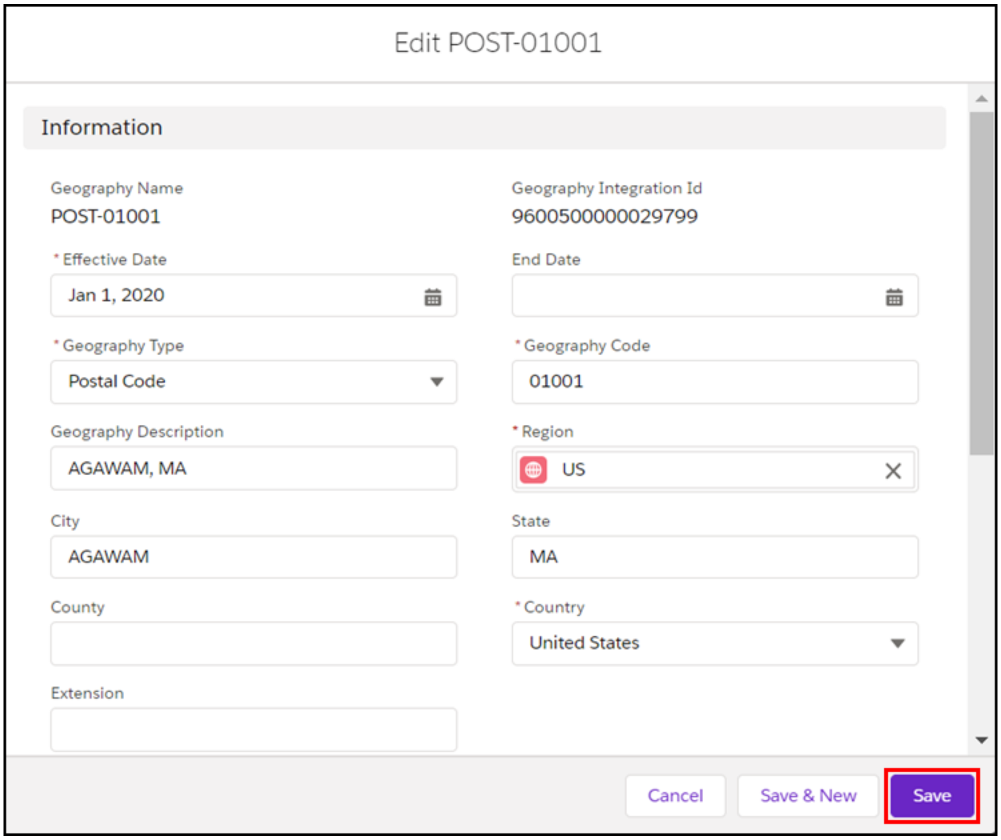
- Click the drop-down for the geography you want to edit and select **Edit**.



- Click the name of the geography to go to the Geography Details page, and then click **Edit**.



3. Modify the geography data and click **Save**.



For information about the fields, see View Geography Information.

Delete a Geography

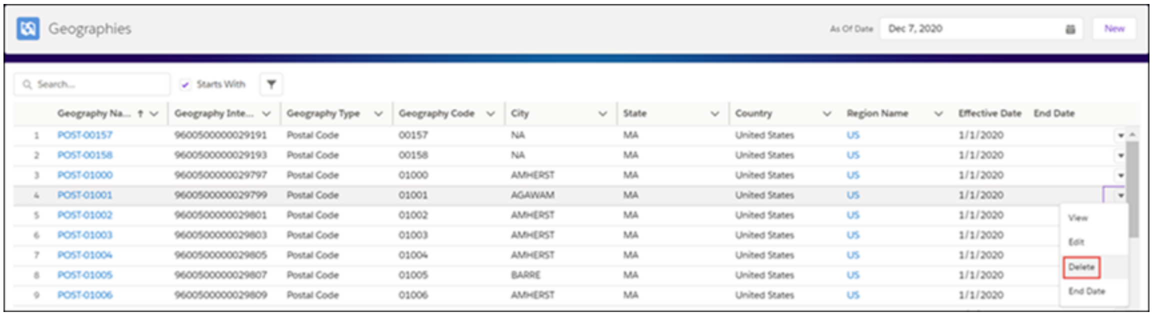
If you add a geography by mistake, you can delete it from the system.

To delete a geography

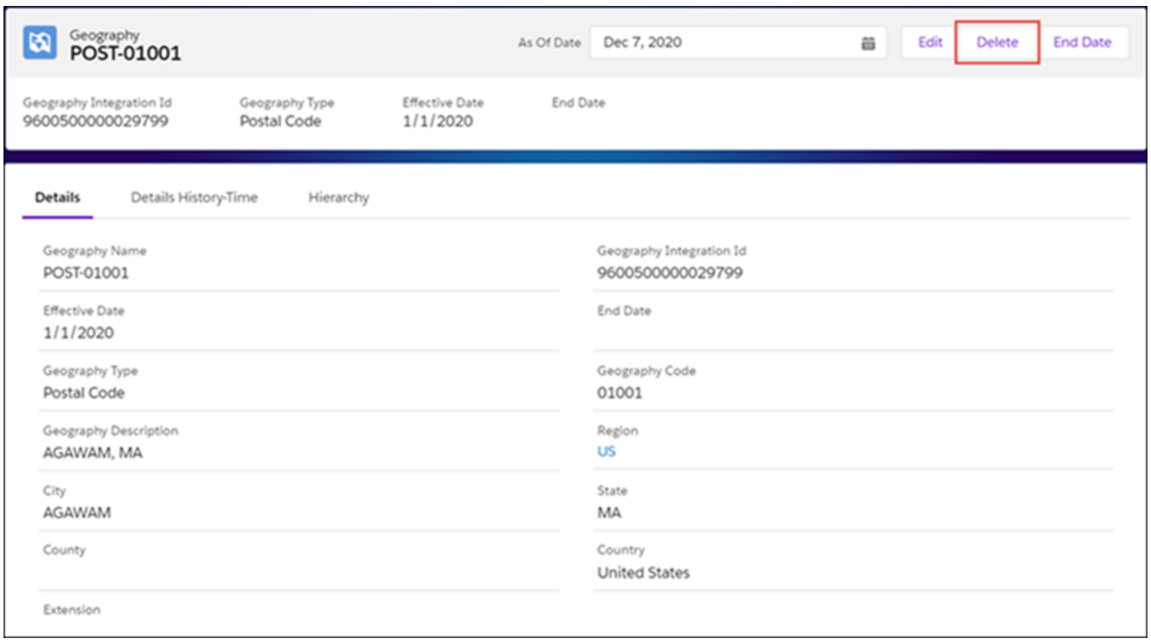
1. Click **Geographies** from the primary navigation bar.
2. Do one of the following:

> **Note:** Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.

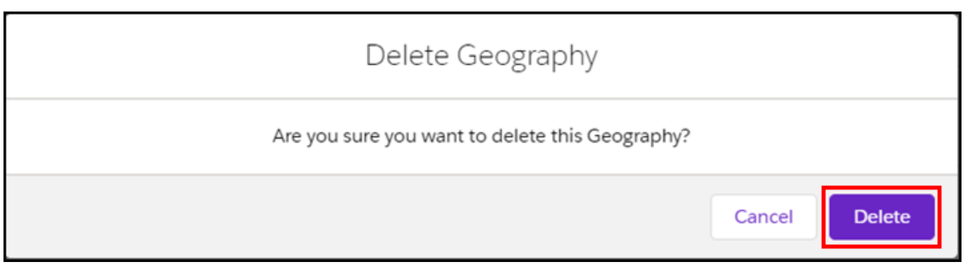
- Select the drop-down for the geography you want to remove and click **Delete**.



- Click the geography name to go to the Geography Details page, and then click **Delete**.



3. Click **Delete** to confirm.



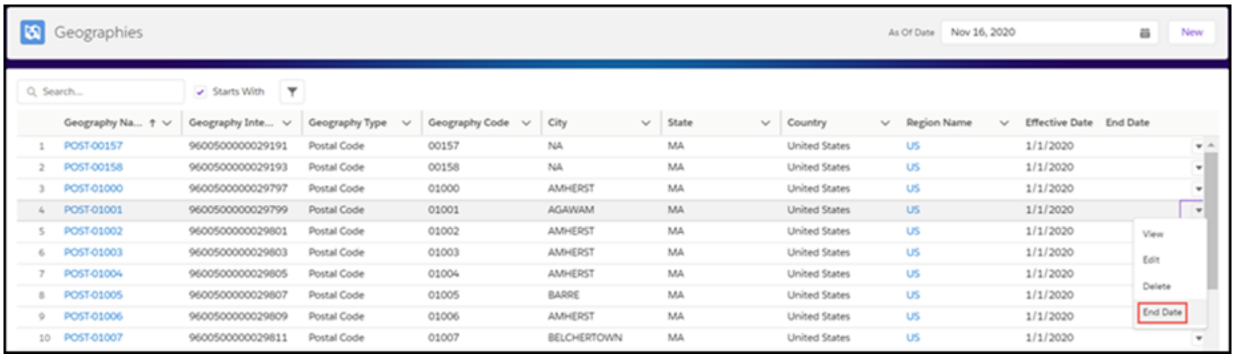
End Date a Geography

You can end date (delete) a geography, so it is no longer active/valid as of the end date.

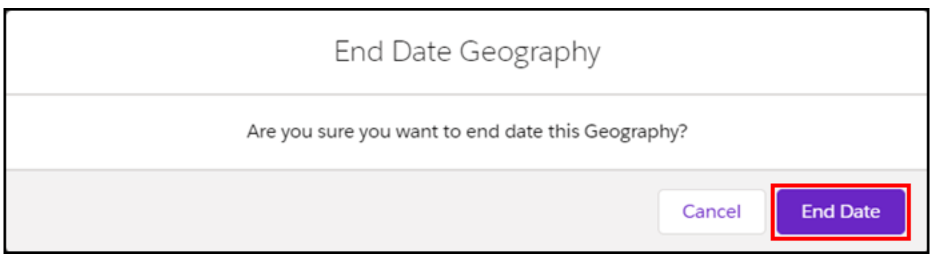
To end date a geography

1. Click **Geographies** from the primary navigation bar.
2. Select the drop-down for the geography you want to remove and click **End Date**.

   Note: Use the **Search** and **Filters** functions to help you locate the geography. See [Search and Filter Functions](#).

3. Click **End Date** to confirm.

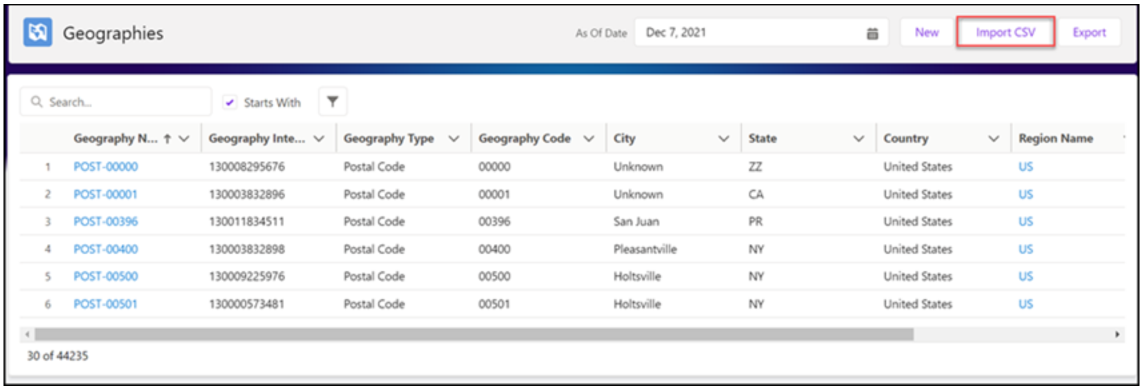
   

Import Geography Data Using CSV Files

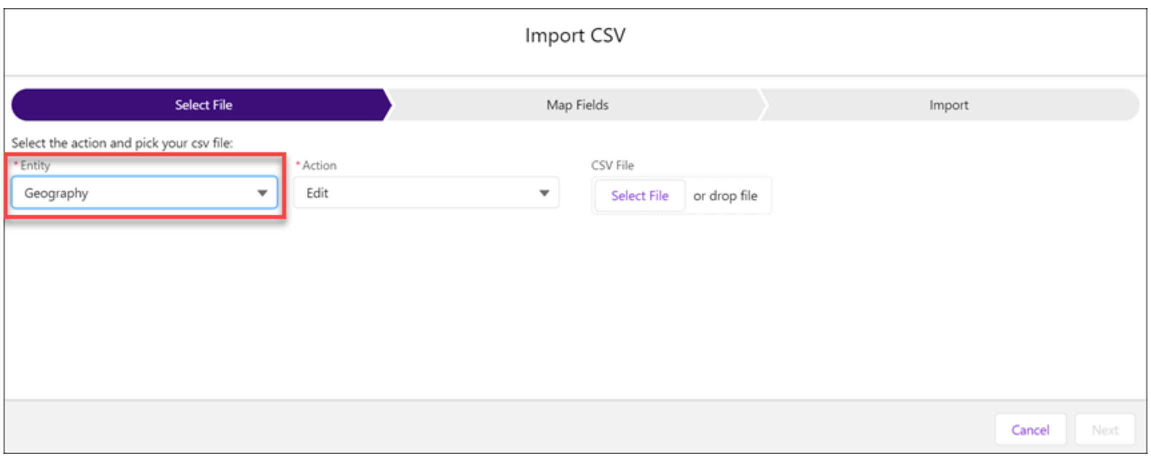
You can import data into the **Geographies** module by uploading it as a CSV file. The CSV file format is defined at run time and is auto-mapped, if possible. If auto-mapping is not possible because field names don't match between the CSV file and OCE Optimizer attribute names, you can map it at run time.

To import data into Geographies

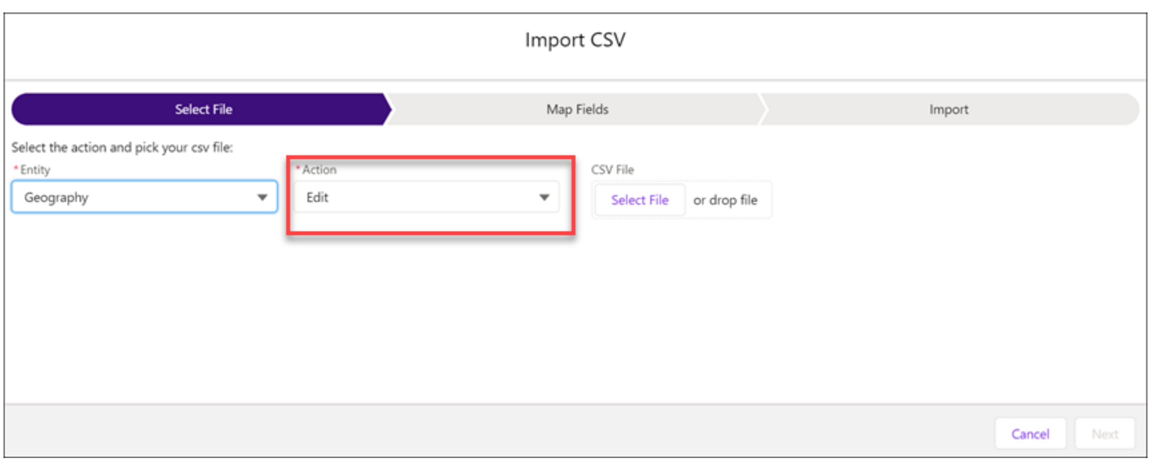
1. From the **Geographies** module, click **Import CSV**.



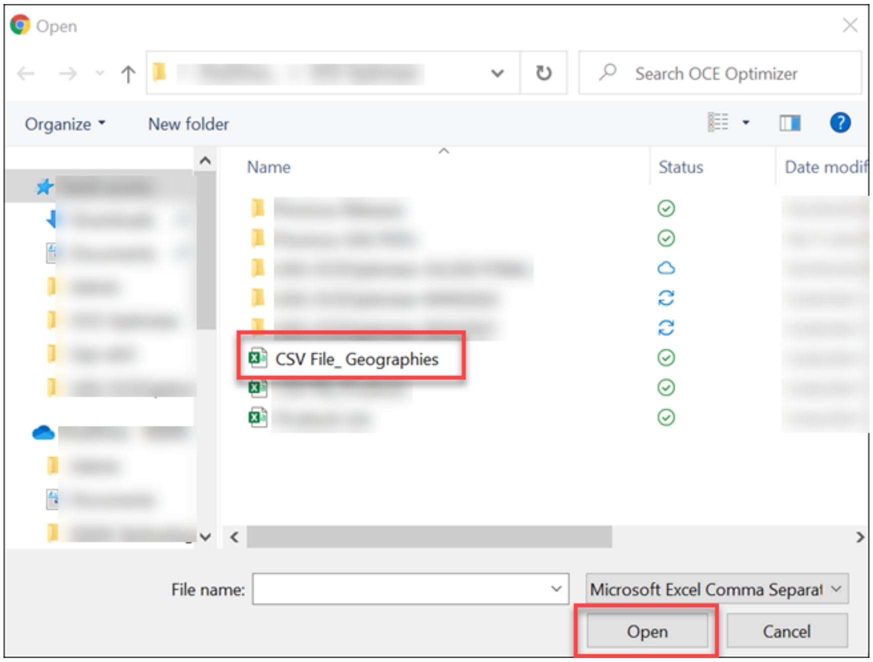
2. Select the entity, such as *Geography*, *Geography Hierarchy*, or *Geography with Hierarchy*.



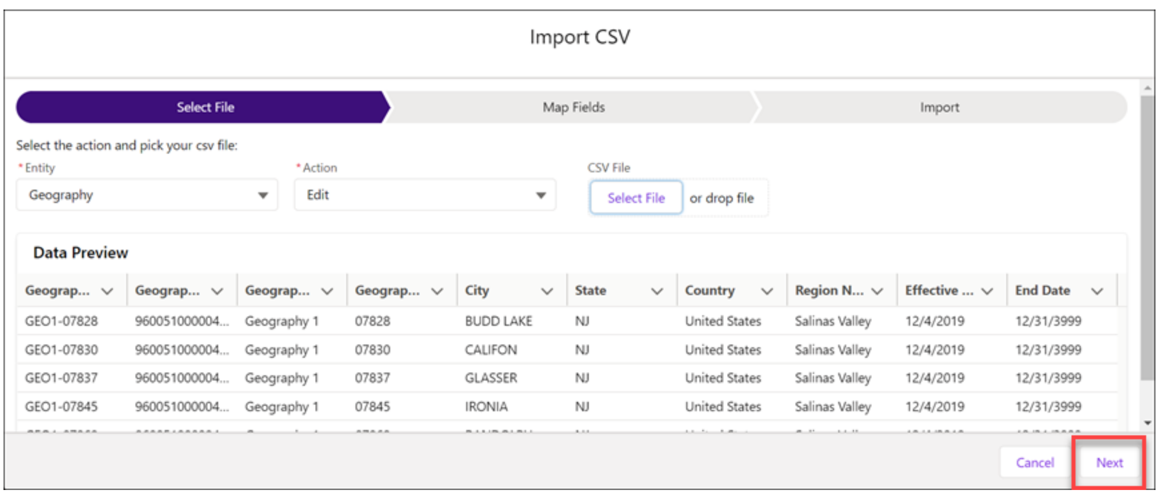
3. Select the type of import action, such as *Add*, *Edit*, *Update End Date*, or *Delete*.



4. Click **Select File**, browse to the file location, select the file, then click **Open**.

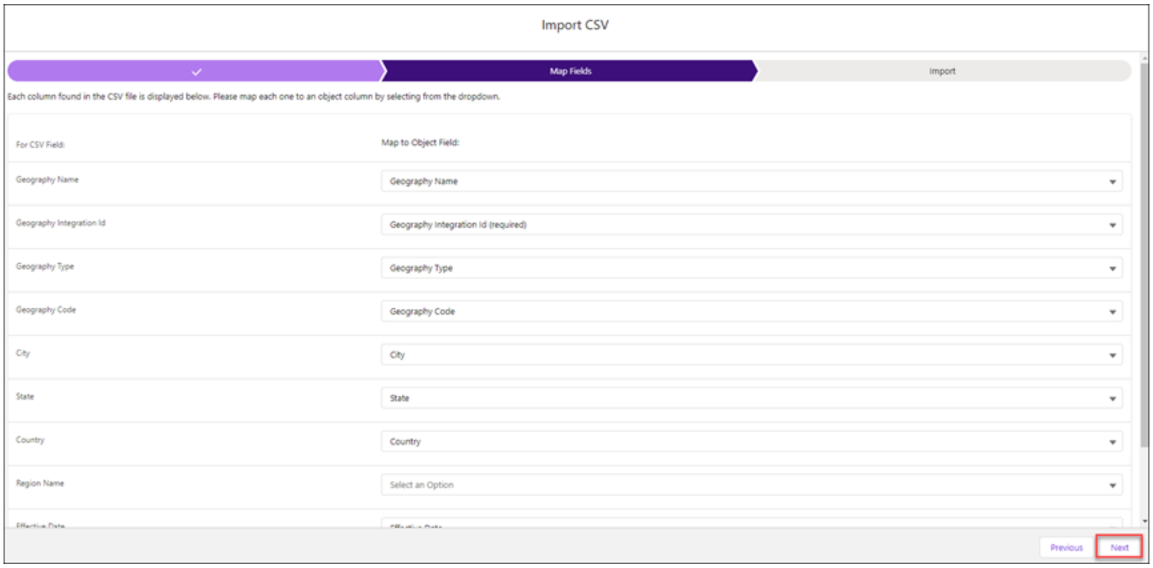


5. Verify the data in the **Data Preview** section, then click **Next**.

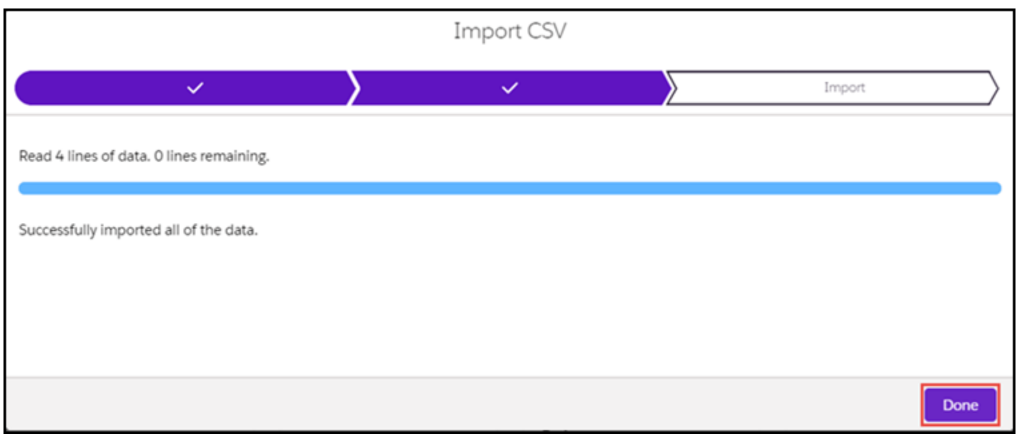


The system automatically maps each column in the csv file to an Object Field and indicates which fields are required.

6. Keep the automatic mapping or customize the mapping based on the csv file contents, then click **Next**.



7. After the data has been successfully imported, click **Done**.



The data is added to the **Geographies** module.

Geography Parent Hierarchies

In the **Geography Parents** section, you can define parent hierarchies for a geography. The parent geographies are above the geography in the hierarchy.

You can have many parent-child relationships in the hierarchy. There are no restrictions on having multiple parents for the same child geography and multiple children for the same parent geography for the same date range.

See:

- [Add a Parent Hierarchy to a Geography](#)
- [Modify a Parent Hierarchy Linked to a Geography](#)
- [End Date a Parent Hierarchy Linked to a Geography](#)
- [Delete a Parent Hierarchy Linked to a Geography](#)

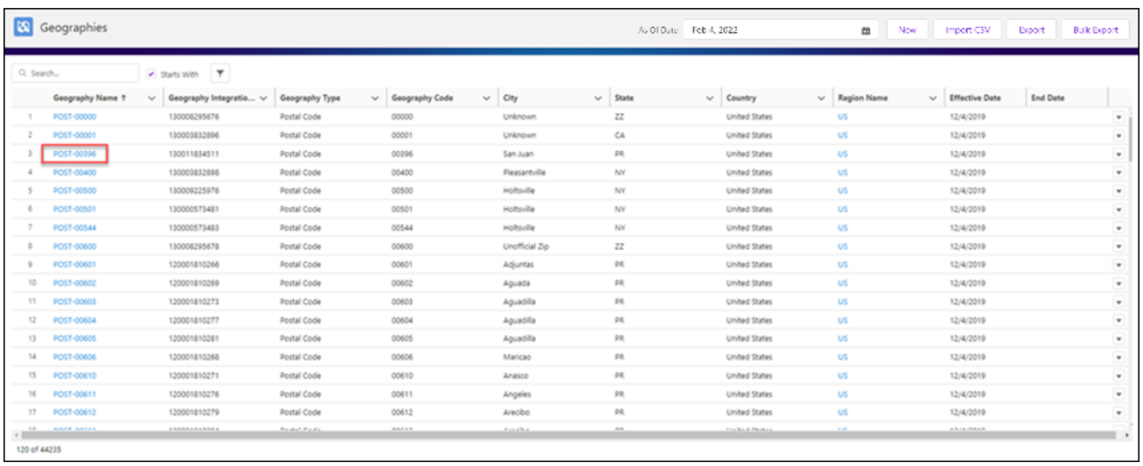
Add a Parent Hierarchy to a Geography

You can add parent hierarchies to a geography.

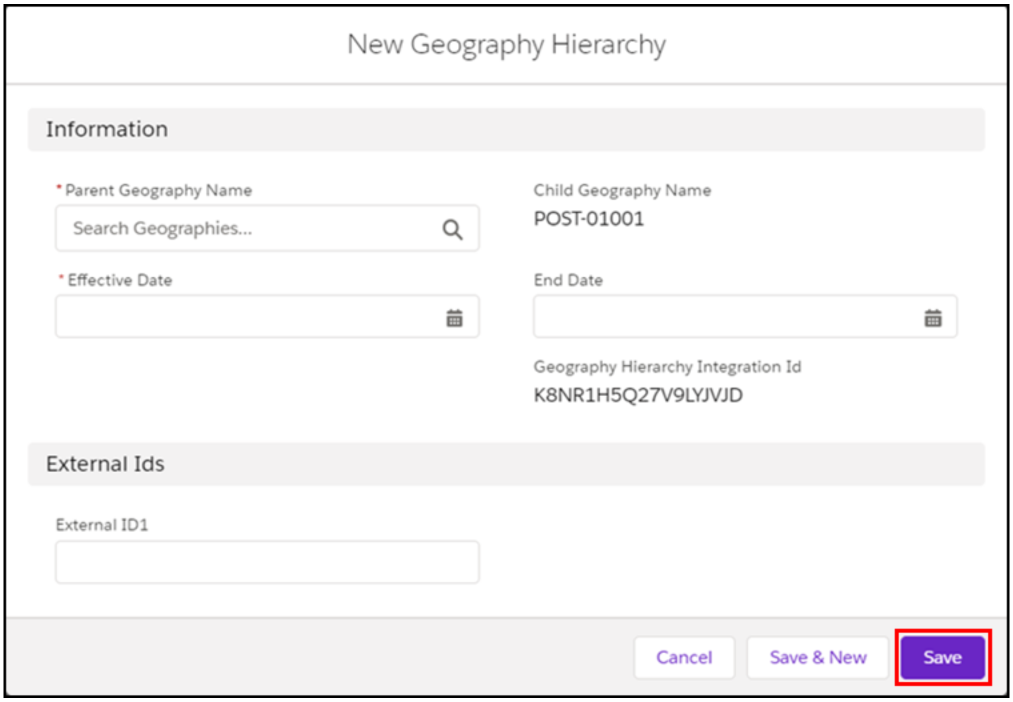
To add a parent hierarchy to a geography

1. Click **Geographies** from the primary navigation bar.
2. Select the geography you want to add a parent hierarchy to.

> **Note:** Use the **Search** and **Filters** functions to help you locate the geography. See [Search and Filter Functions](#).



3. Enter parent hierarchy information and click **Save**.



For information about the fields, see View Geography Information.

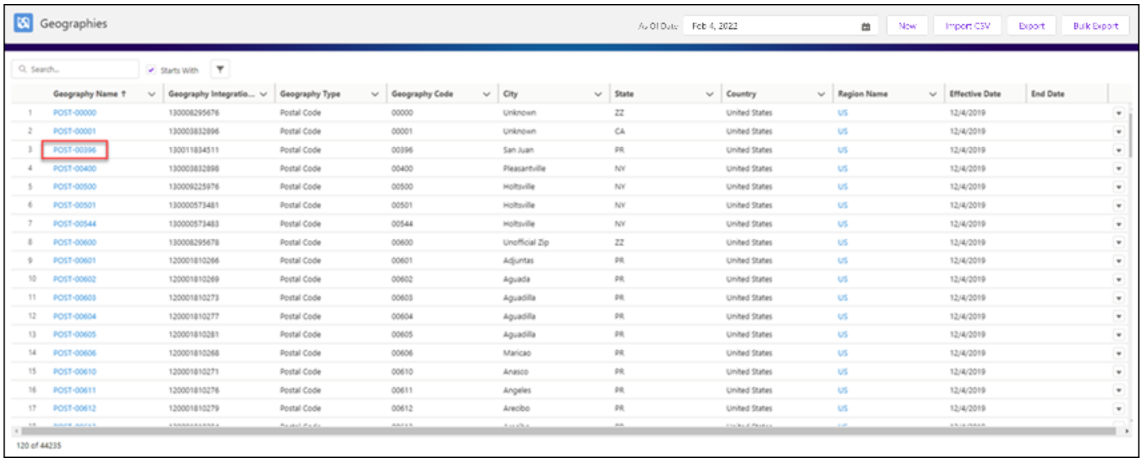
Modify a Parent Hierarchy Linked to a Geography

You can make updates to parent hierarchies linked to a geography.

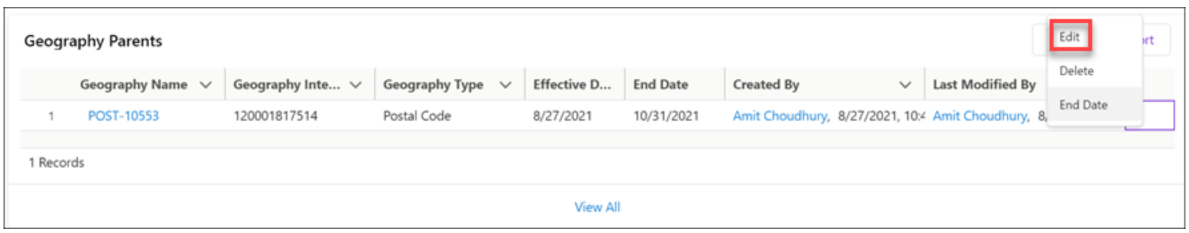
To edit a parent hierarchy linked to a geography

1. Click **Geographies** from the primary navigation bar.
2. Select the geography that has the parent hierarchy you want to make changes to.

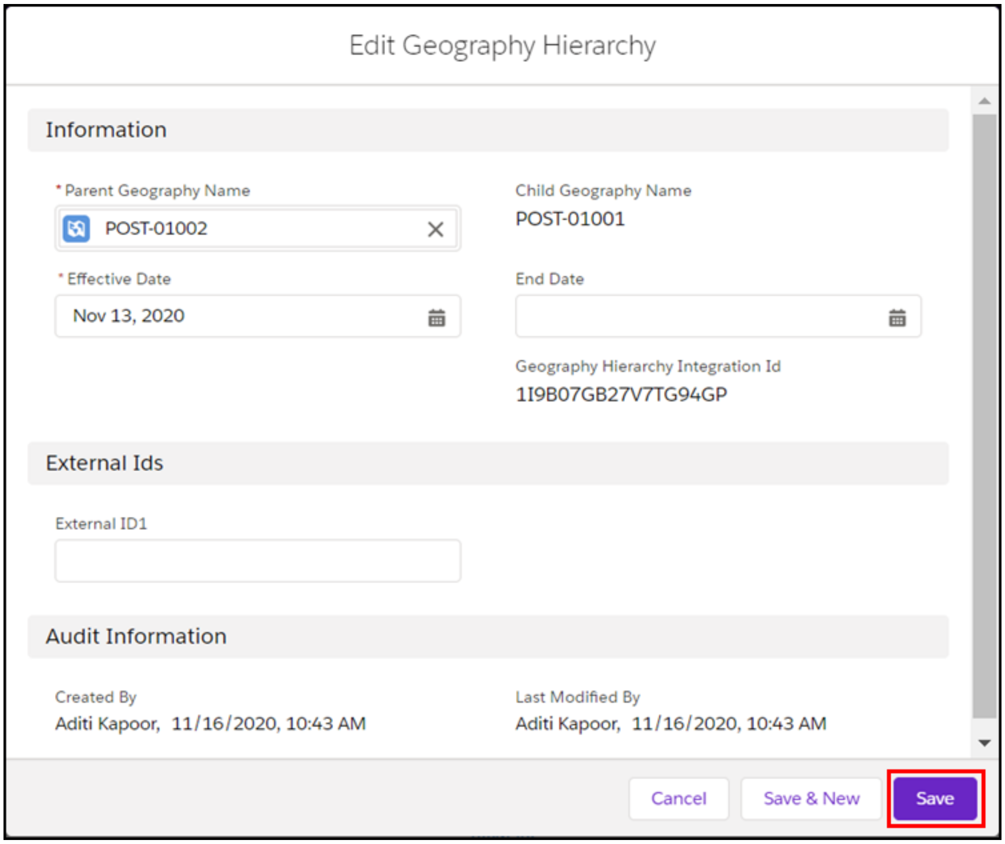
> **Note:** Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.



3. Scroll to the **Geography Parents** section, click the drop-down for the hierarchy you want to edit, and then select **Edit**.



4. Modify the parent hierarchy data and click **Save**.



For information about the fields, see View Geography Information.

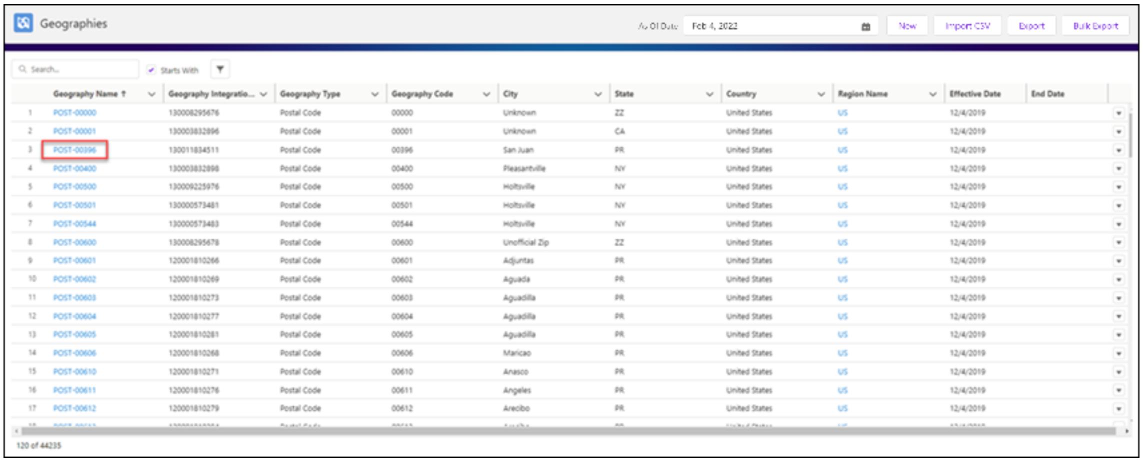
End Date a Parent Hierarchy Linked to a Geography

You can end date (delete) a parent hierarchy linked to a geography.

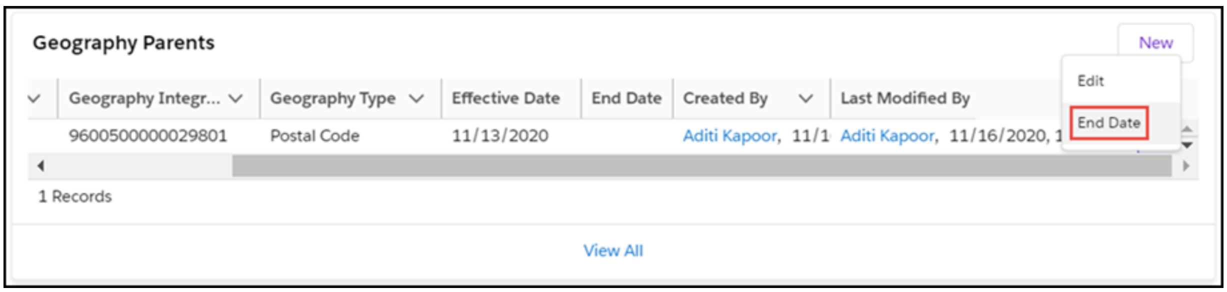
To end date a parent hierarchy linked to a geography

1. Click **Geographies** from the primary navigation bar.
2. Select the geography that has the parent hierarchy you want to delete.

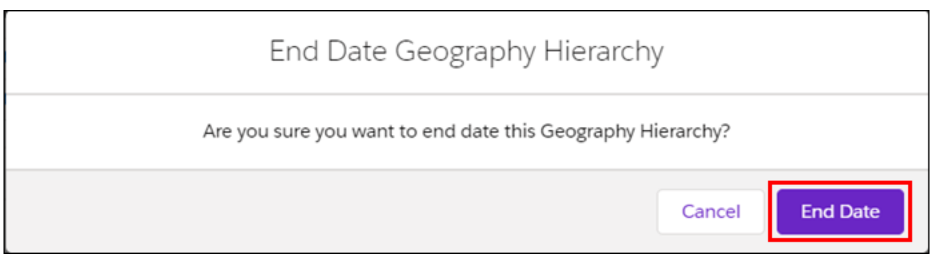
> **Note:** Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.



3. Scroll to the **Geography Parents** section, click the drop-down for the hierarchy you want to remove, and then select **End Date**.



4. Click **End Date** to confirm.



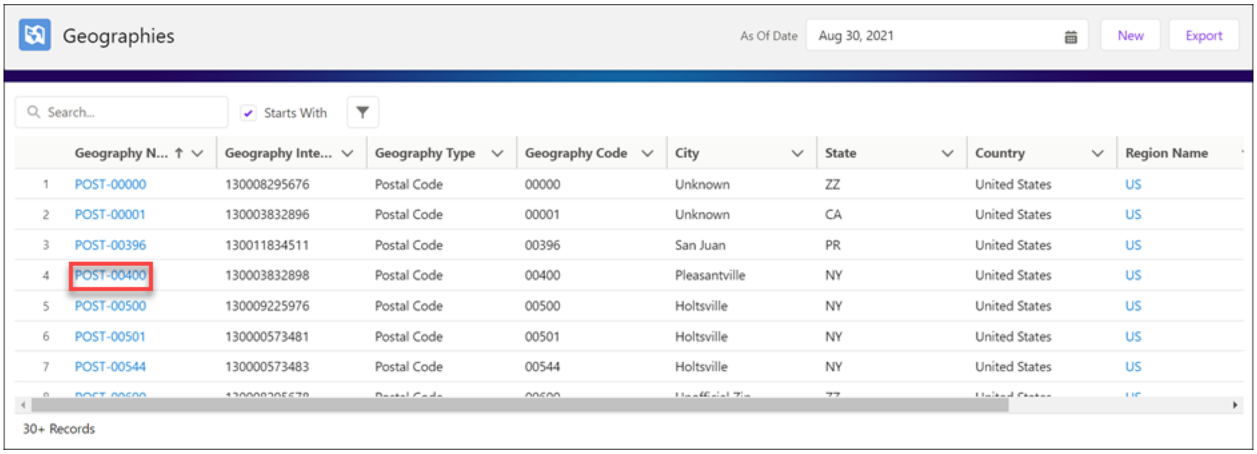
Delete a Parent Hierarchy Linked to a Geography

You can delete parent hierarchies linked to a geography.

To delete a parent hierarchy linked to a geography

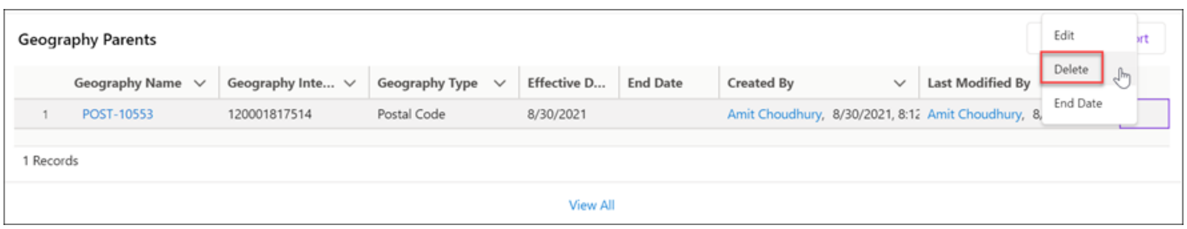
1. Click **Geographies** from the primary navigation bar.

2. Select the geography that has the parent hierarchy you want to delete.

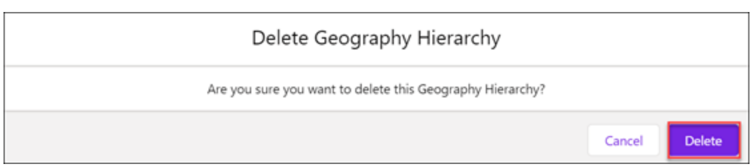


Note: Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.

3. From the **Details** tab, scroll to the **Geography Parents** section, click the drop-down for the hierarchy you want to delete, then select **Delete**.



4. Click **Delete** to confirm.



For information about the fields, see View Geography Information.

Geography Child Hierarchies

In the **Geography Children** section, you can define child hierarchies for a geography. The child geographies are below the geography in the hierarchy.

You can have many parent-child relationships in the hierarchy. There are no restrictions on having multiple parents for the same child geography and multiple children for the same parent geography for the same date range.

See:

- Add a Child Hierarchy to a Geography
- Modify a Child Hierarchy Linked to a Geography
- End Date a Child Hierarchy Linked to a Geography
- Delete a Child Hierarchy Linked to a Geography

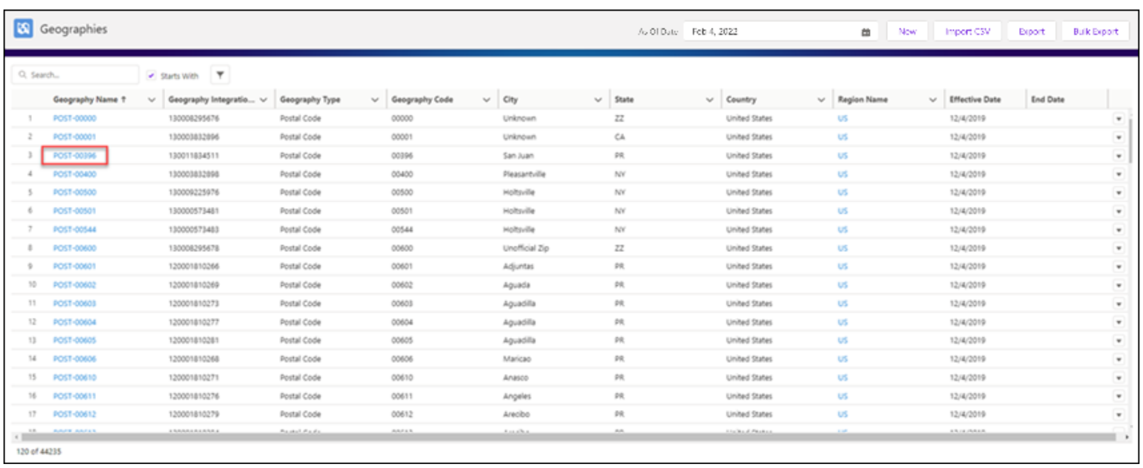
Add a Child Hierarchy to a Geography

You can add child hierarchies to a geography.

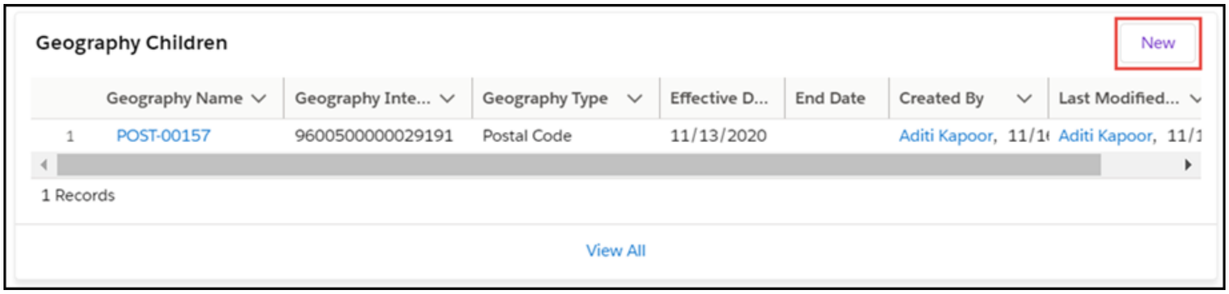
To add a child hierarchy to a geography

1. Click **Geographies** from the primary navigation bar.
2. Select the geography you want to add a child hierarchy to.

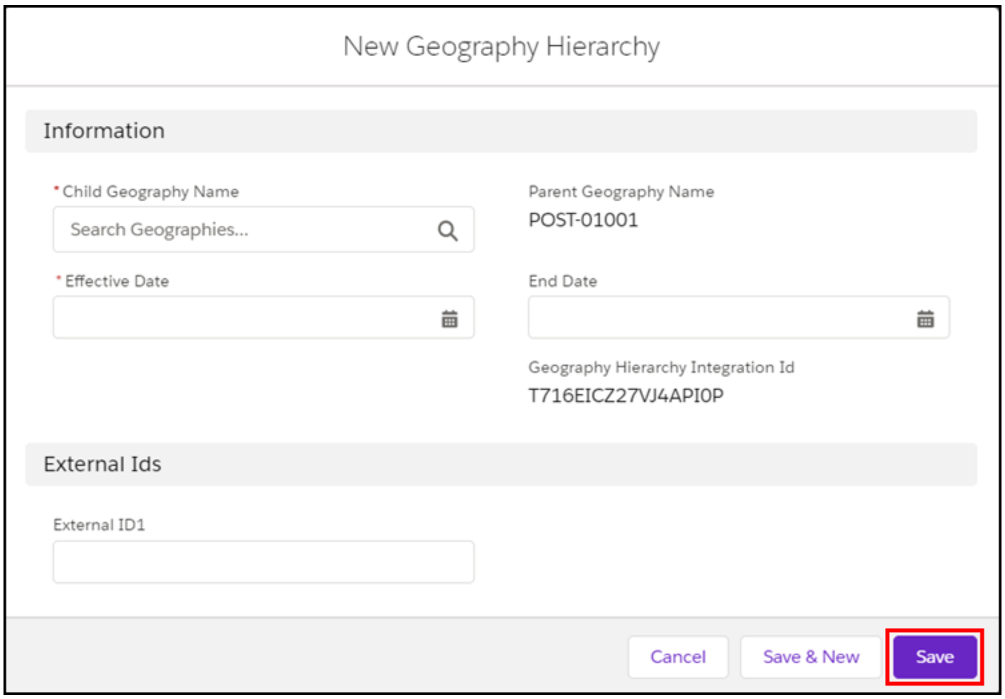
> **Note:** Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.



3. Scroll to the **Geography Children** section and click **New**.



4. Enter child hierarchy information and click **Save**.



For information about the fields, see View Geography Information.

Modify a Child Hierarchy Linked to a Geography

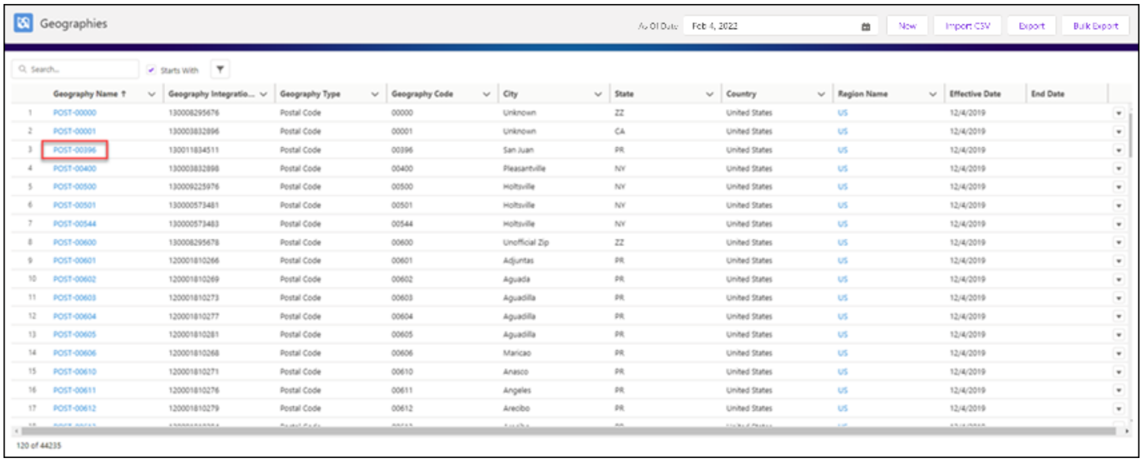
You can modify child hierarchies linked to a geography.

To modify a child hierarchy linked to a geography

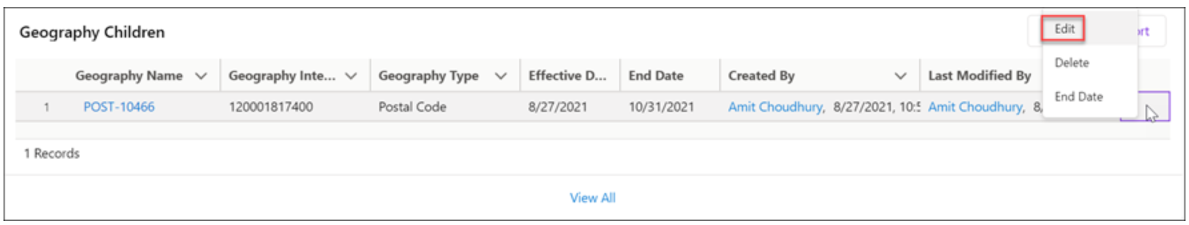
1. Click **Geographies** from the primary navigation bar.

2. Select the geography that has the child hierarchy you want to make changes to.

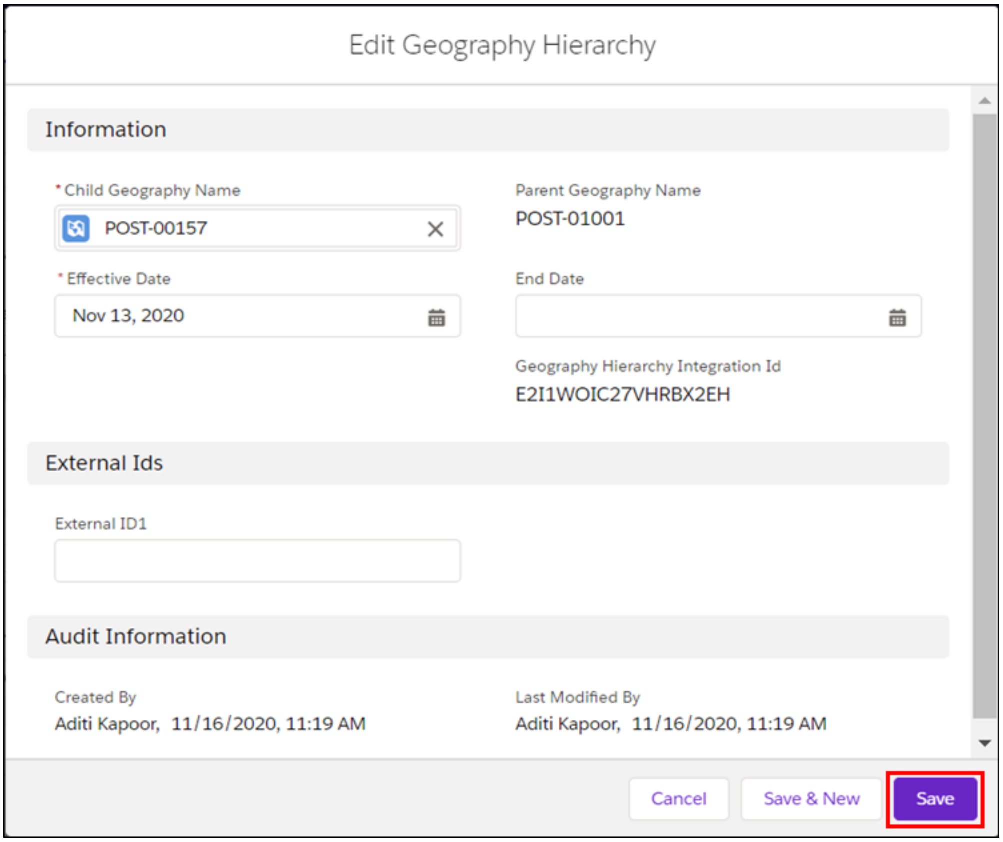
> **Note:** Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.



3. Scroll to the **Geography Children** section, click the drop-down for the hierarchy you want to edit, and then select **Edit**.



4. Modify the child hierarchy data and click **Save**.



For information about the fields, see View Geography Information.

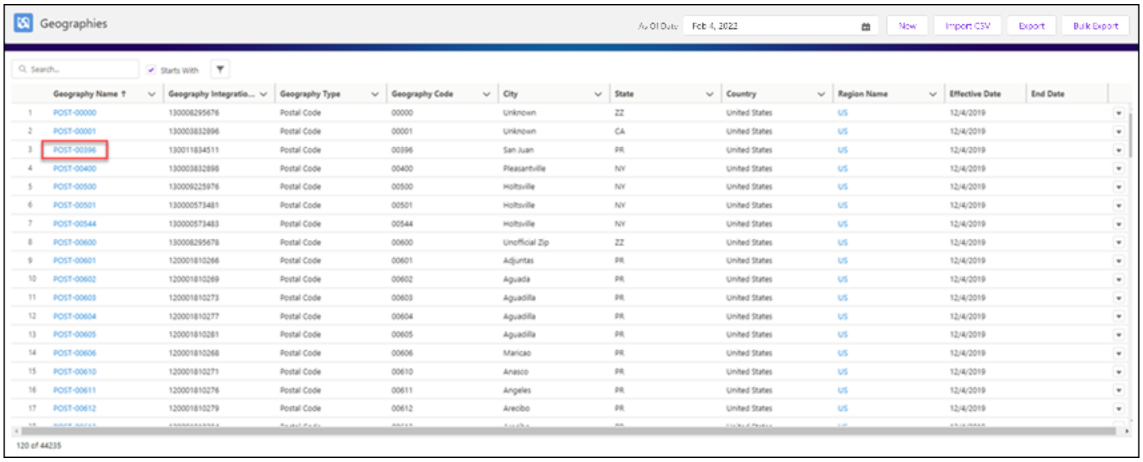
End Date a Child Hierarchy Linked to a Geography

You can end date (delete) a child hierarchy linked to a geography.

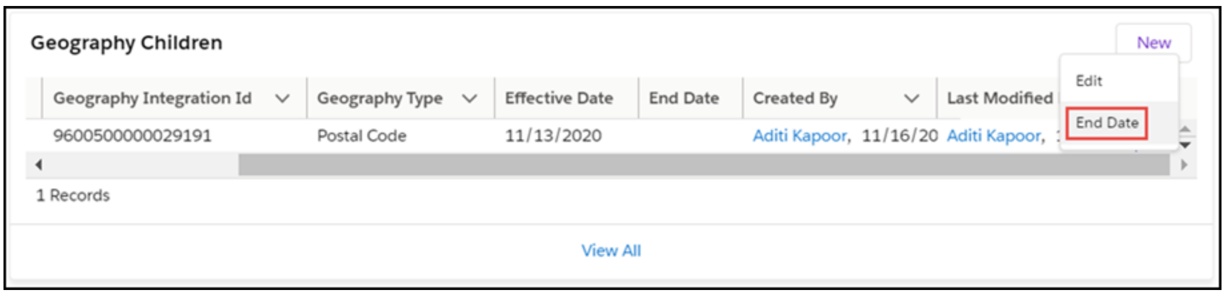
To delete a child hierarchy linked to a geography

1. Click **Geographies** from the primary navigation bar.
2. Select the geography that has the child hierarchy you want to make changes to.

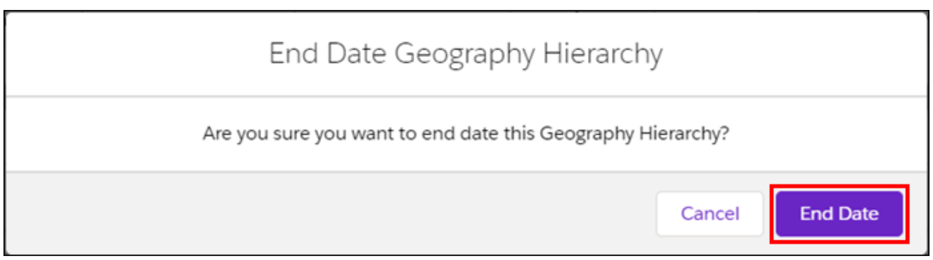
Note: Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.



3. Scroll to the **Geography Children** section, click the drop-down for the hierarchy you want to remove, and then select **End Date**.



4. Click **End Date** to confirm.



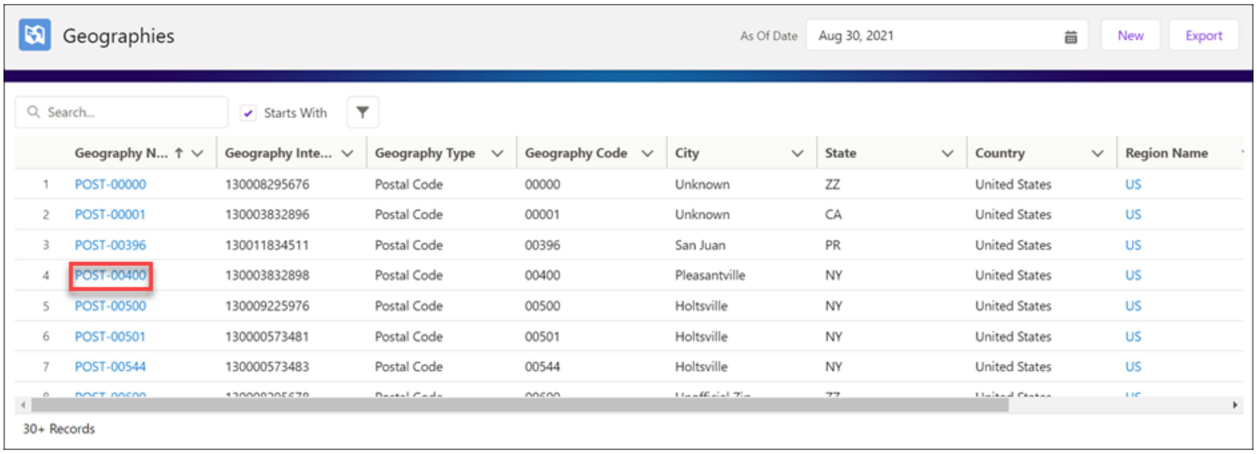
Delete a Child Hierarchy Linked to a Geography

You can delete child hierarchies linked to a geography.

To delete a child hierarchy linked to a geography

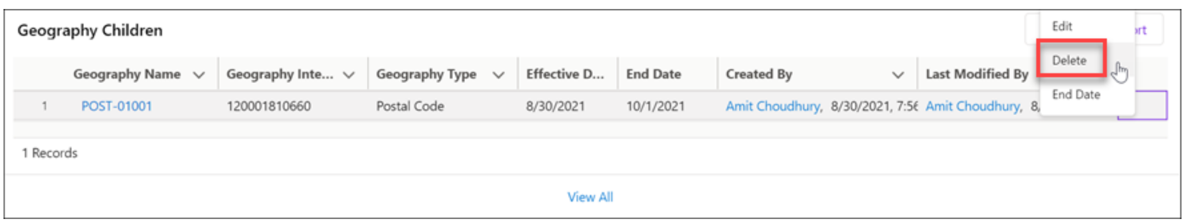
1. Click **Geographies** from the primary navigation bar.

2. Select the geography that has the child hierarchy you want to delete.

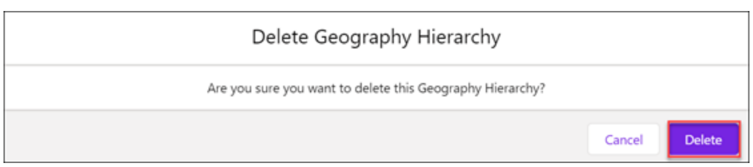


Note: Use the **Search** and **Filters** functions to help you locate the geography. See Search and Filter Functions.

3. From the **Details** tab, scroll to the **Geography Children** section, click the drop-down for the hierarchy you want to delete, then select **Delete**.



4. Click **Delete** to confirm.



For information about the fields, see View Geography Information.

Manage Regions

OCE Optimizer supports multiple regions within the same application. Access to the information for each region can be controlled by assigning access rights to the appropriate users. Based on access rights, a user may have access to one or multiple regions.

Users can monitor access to administration of data via regions. Regions act as a high-level filter, since for most entities in the application, you can specify to which region the entity applies. For example, when adding a territory, you can add it to the appropriate region's hierarchy. If you have access to more than one region, you can manage entities within each region. An entity that is not assigned to any region is assigned globally, meaning all regions can access the information.

See:

- View Region Information
- Region Creation
- Region Parent Hierarchies
- Region Child Hierarchies

View Region Information

The **Region** module displays general information for the region, region parent and child links, audit information, external IDs, the history of changes made to the region, and the hierarchical structure of the region.

Regions listed on the main list page are based on the **As Of Date** field.

To view region information

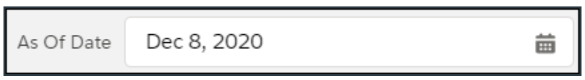
1. Click **Regions** from the primary navigation bar.
2. From the Regions screen, select the region you want to view.

> **Note:** Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.

3. View the region's information.

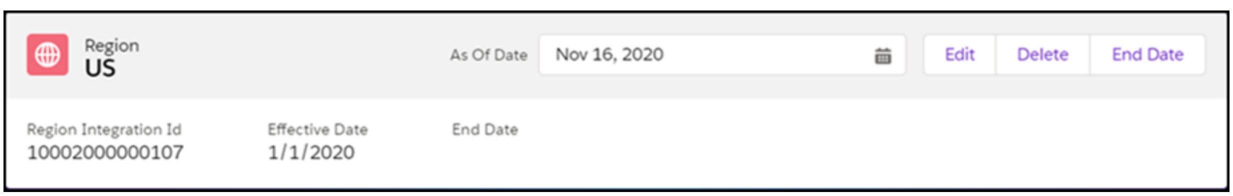
   The Region Name, As Of Date, actions available for the Region entity, and the Region highlight section are displayed on the top of the Region entity page for all the Region tabs.

   As Of Date and Actions

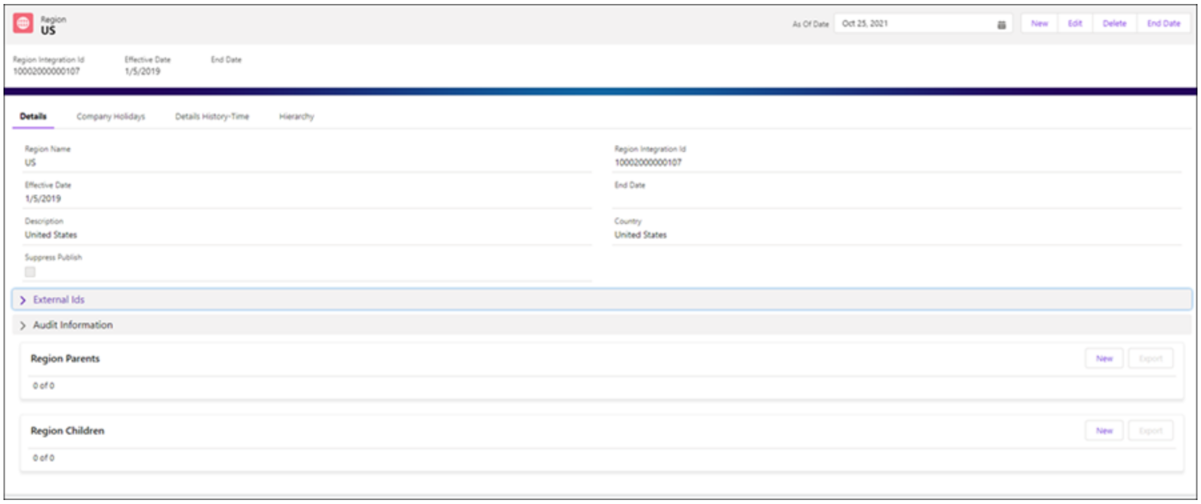


   - **As Of Date**: The data displayed for the region is based on the date selected in this field.
   - **Edit**: If applicable, click to make modifications to the region information.
   - **Delete**: If applicable, click to remove the region from system.
   - **End Date**: If applicable, click to end date a region, so it is no longer active/valid as of this date.

   Highlight Section



   - **Region Name**: Name of the region.
   - **Region Integration ID**: Unique region identification number.
   - **Effective Date**: Indicates the date when the region is active/valid.
   - **End Date**: Indicates the date after which the region is no longer active/valid.



For details regarding the information displayed in each tab of the Region screen, see:

- Region Details Tab
- Region Details History-Time Tab
- Region Hierarchy Tab

Region Details Tab

The **Details** tab contains general information about the region, region parent and child links, audit information, and external IDs. The data displayed is the current view based on the As Of Date.

General Information

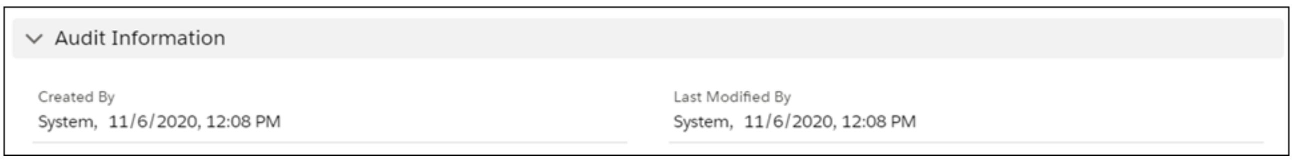
- **Region Name**: Name of the region.
- **Region Integration ID**: Unique region identification number.
- **Effective Date**: Indicates the date when the region is active/valid.
- **End Date**: Indicates the date after which the region is no longer active/valid.

- **Description**: Description of the region.
- **Country**: The default country for the region.

External IDs

- **External ID1—ID5**: Additional identification numbers for cross referencing.

Audit Information



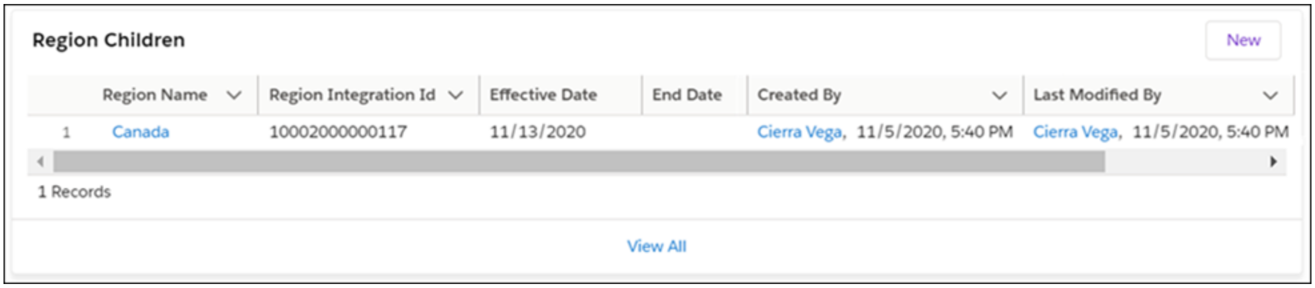
- **Created By**: A combination of the creator's user name and the date/time the region was created.
- **Last Modified By**: A combination of the user name of the last person to edit the region and the date/time it was updated.

Region Parents

- **Region Name**: The name of the parent region.
- **Region Integration ID**: Unique region identification number.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.

- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the parent region was created.
- **Last Modified By**: A combination of the user name of the last person to edit the parent region and the date/time it was updated.

Region Children

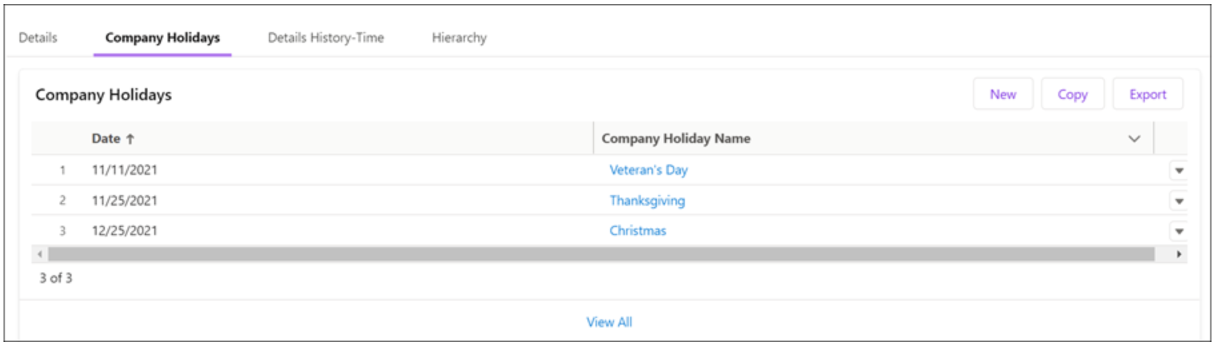


- **Region Name**: The name of the child region.
- **Region Integration ID**: Unique region identification number.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the child region was created.
- **Last Modified By**: A combination of the user name of the last person to edit the child region and the date/time it was updated.

Region Company Holidays Tab

The **Company Holidays** tab shows the holiday names and the holiday dates of the specific region.

Company Holidays



- **Date**: The date of the holiday the company observes.
- **Company Holiday Name**: The name of the holiday the company observes.

Region Details History-Time Tab

The **Details History-Time** tab displays the same information as the **Details** tab, except it shows all past, current, and future views of region details. This tab also displays the audit history of key fields.

Field History

- **Date**: The date and time the field was modified.
- **Field**: The name of the field that was modified.
- **Full Name**: The user name of the person who modified the field.
- **Old Value**: The previous value of the field.
- **New Value**: The current value of the field.
- **Scenario Name**: The scenario associated with the field modification.
- **Scenario Integration Id**: The scenario integration identification number associated with the field modification.

Region Parents

Region Parents

	Region Name	Region Integration Id	Effective Date	End Date	Created By	Last Modified By
1	North America	10002000000127	1/1/2020		Cierra Vega, 11/5/2020, 5:40 PM	Cierra Vega, 11/5/2020, 5:40 PM

1 Records

View All

For details on the fields in this section, see the **Region Parents** section in Region Details Tab.

Region Children

Region Children

	Region Name	Region Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Canada	10002000000117	11/13/2020		Cierra Vega, 11/5/2020, 5:40 PM	Cierra Vega, 11/5/2020, 5:40 PM

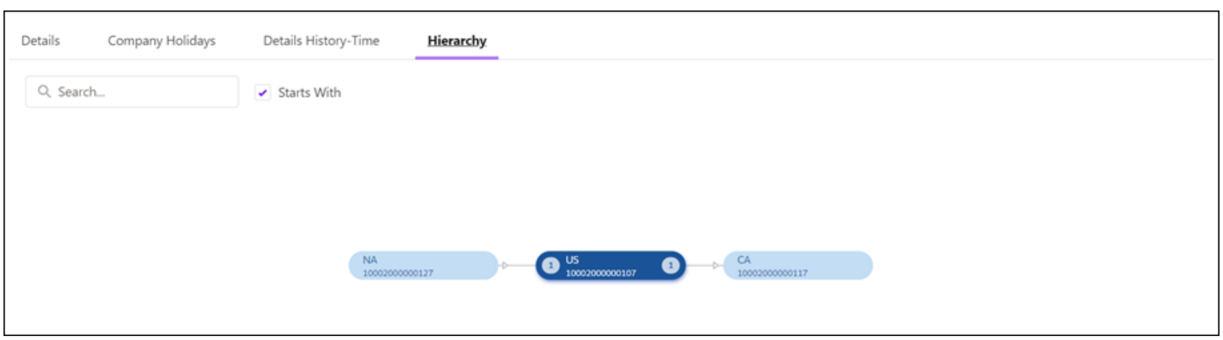
1 Records

View All

For details on the fields in this section, see the **Region Children** section in Region Details Tab.

Region Hierarchy Tab

The **Region Hierarchy** tab displays the parent-child hierarchy in a pictorial form. The data displayed is based on the **As Of Date** field.



The hierarchy diagram displays the selected region in the middle. If the region has parent regions linked to it, they are displayed to the left. If the region has child regions linked to it, they are displayed to the right.

Each node contains the region name and integration ID. If the regions have parent and child regions linked to them, the node changes from light blue to dark blue when expanded. The total number of linked parent/child regions are displayed in the node (parent number is on the left and child number is on the right).

To view the details of a Region, click the region name in the node.

Region Creation

For each new region, you can enter general information for the region (such as a description that identifies the region), the external ID associated with the region, the effective and end dates of the region, company holidays observed by the region, and the default country for the region.

See:

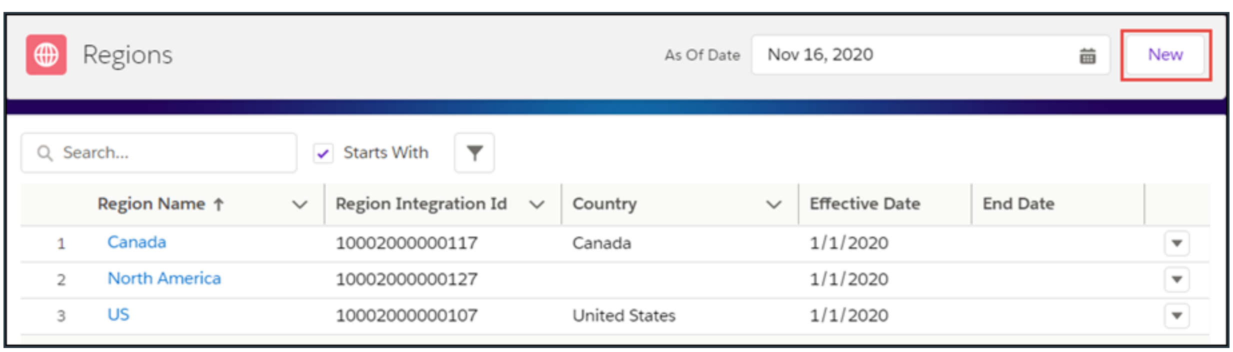
- Add a Region
- Modify a Region
- Delete a Region
- End Date a Region

Add a Region

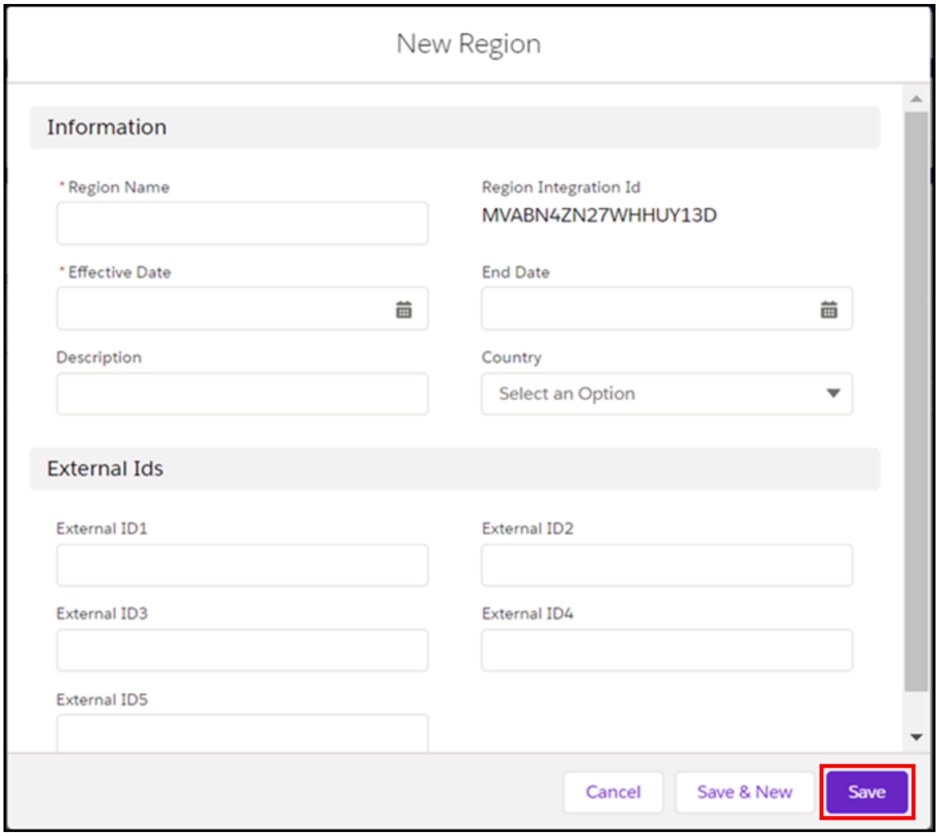
You can add regions to the application.

To add a Region

1. Click **Regions** from the primary navigation bar.
2. From the Regions page, click **New**.



3. Enter information for the new region and click **Save**.



For information about the fields, see View Region Information.

Modify a Region

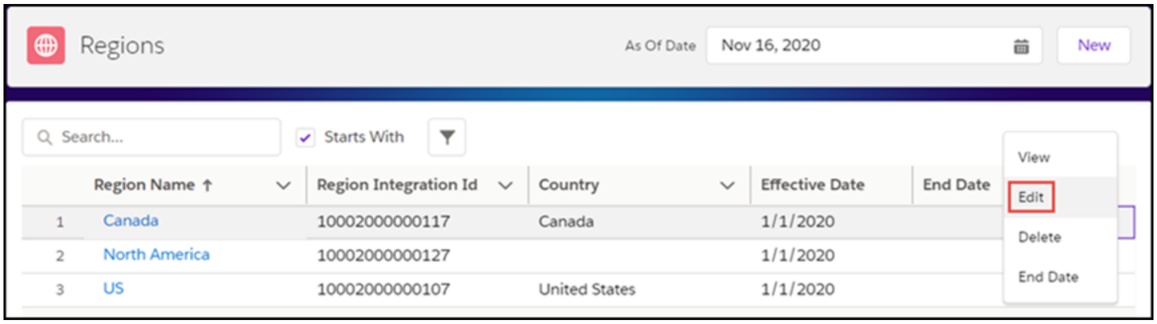
You can make updates to the information of an existing Region.

To edit a Region

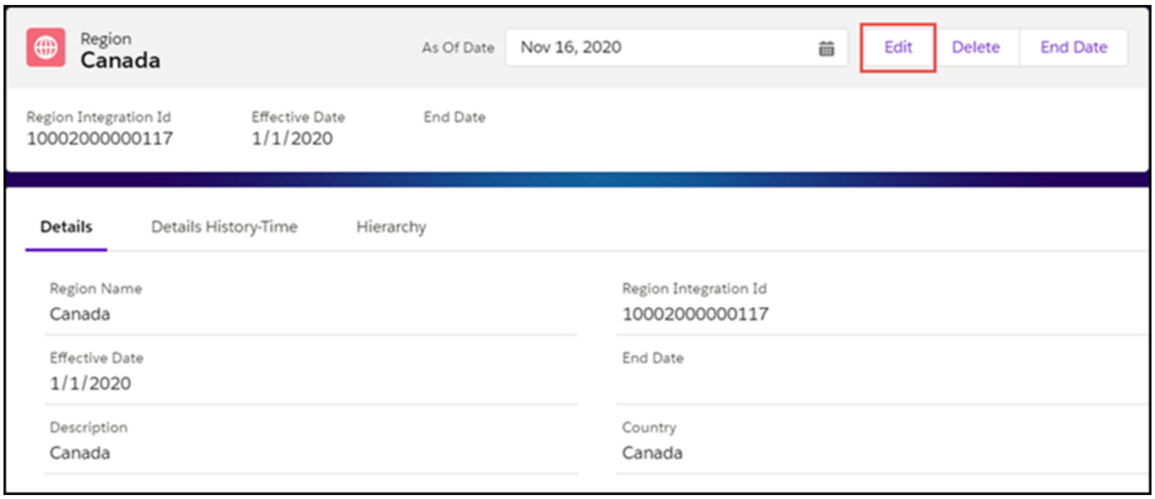
1. Click **Regions** from the primary navigation bar.
2. After you find the region, do one of the following:

> **Note:** Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.

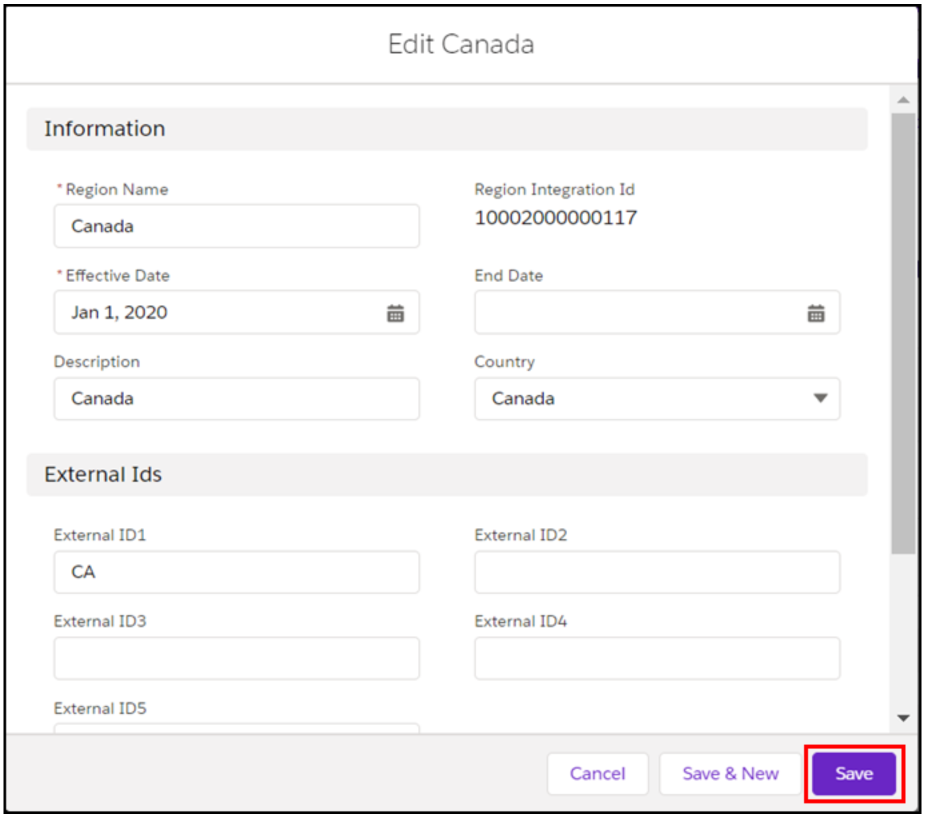
- Click the drop-down for the region you want to edit and select **Edit**.



- Click the name of the region to go to the Region Details page, and then click **Edit**.



3. Modify the region data and click **Save**.



For information about the fields, see View Region Information.

Delete a Region

If you added a region by mistake, you can delete it from the system.

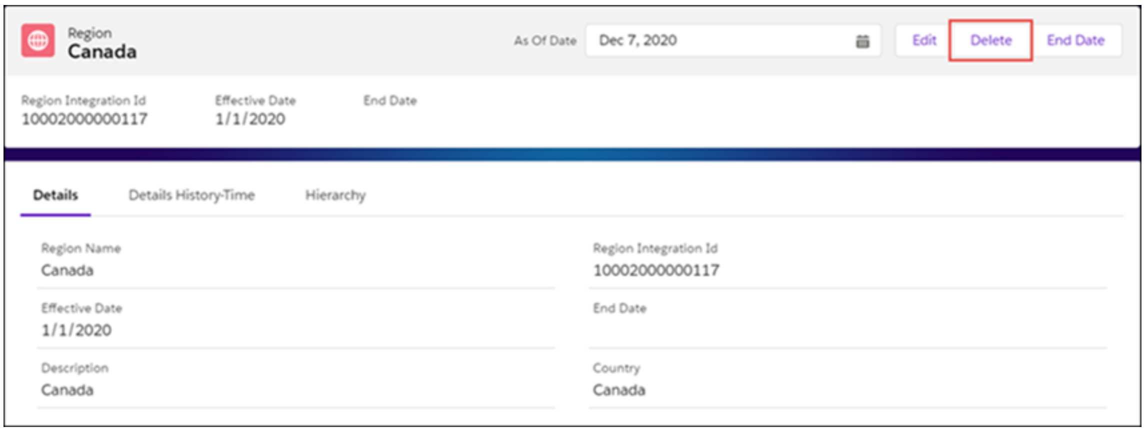
To delete a region

1. Click **Regions** from the primary navigation bar.
2. Do one of the following:

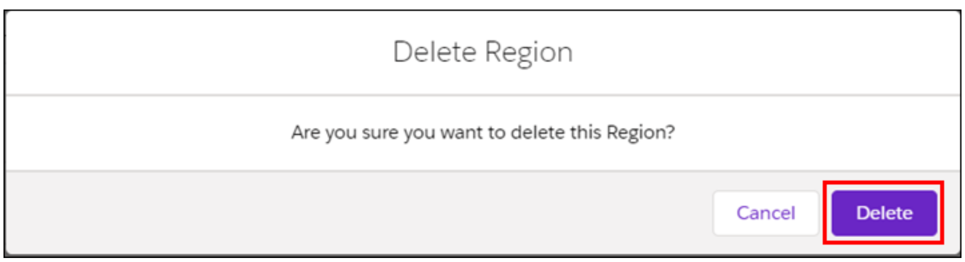
> **Note:** Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.

- Select the drop-down for the region you want to delete and click **Delete**.

- Click the region name to go to the Region Details page, and then click **Delete**.



3. Click **Delete** to confirm.



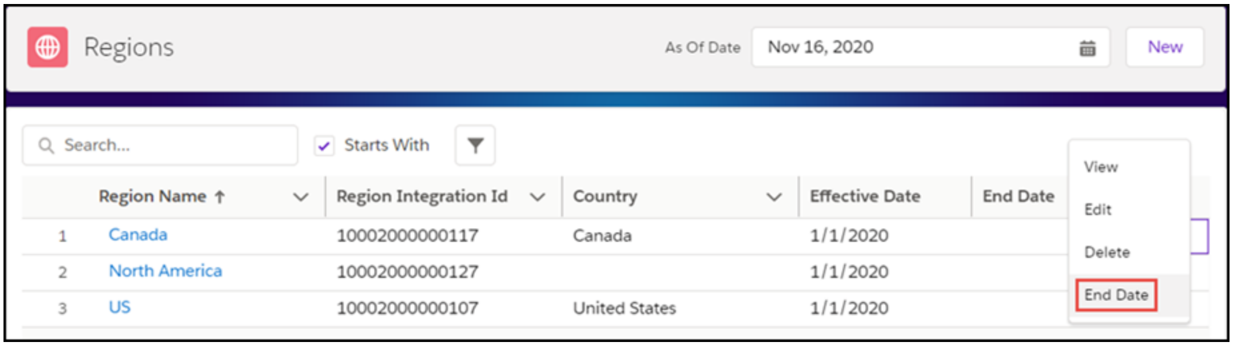
End Date a Region

You can end date (delete) a region, so it is no longer active/valid as of the end date.

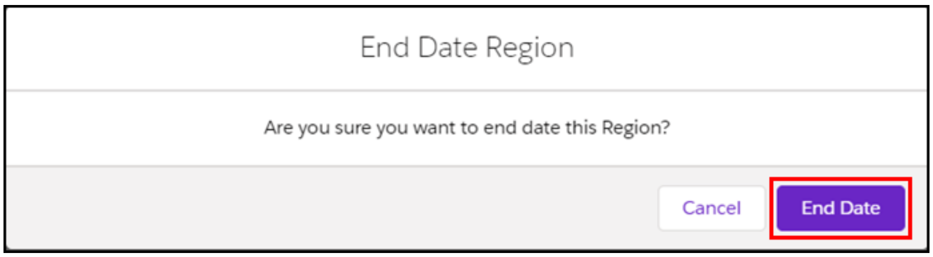
To end date a region

1. Click **Regions** from the primary navigation bar.
2. Select the drop-down for the region you want to remove and click **End Date**.

> **Note:** Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.



3. Click **End Date** to confirm.



Region Parent Hierarchies

In the **Region Parents** section, you can define parent hierarchies for a region. The parent regions are above the region in the hierarchy.

You can have many parent-child relationships in the hierarchy. There are no restrictions on having multiple parents for the same child region and multiple children for the same parent region for the same date range.

See:

- Add a Parent Hierarchy to a Region
- Modify a Parent Hierarchy Linked to a Region
- End Date a Parent Hierarchy Linked to a Region

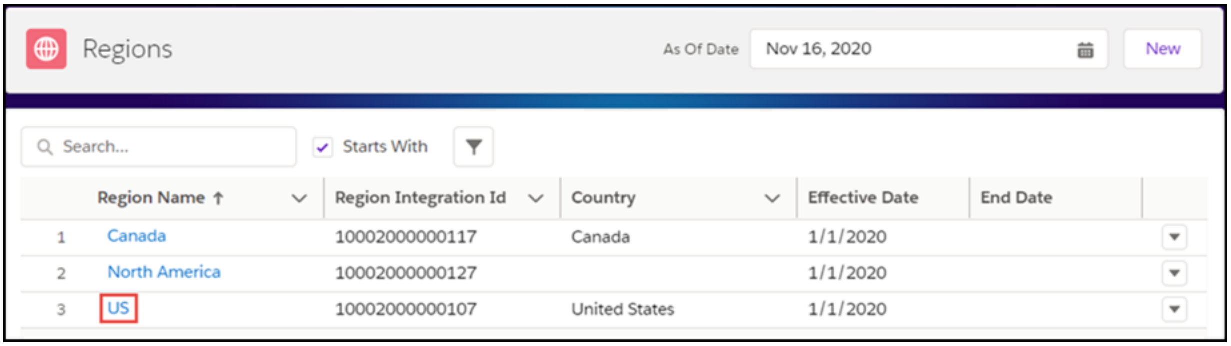
Add a Parent Hierarchy to a Region

You can add parent hierarchies to a region.

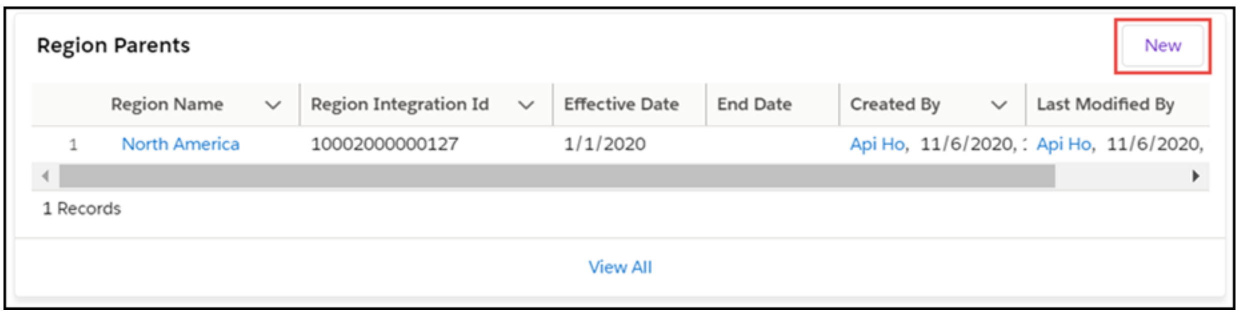
To add a parent hierarchy to a region

1. Click **Regions** from the primary navigation bar.
2. Select the region you want to add a parent hierarchy to.

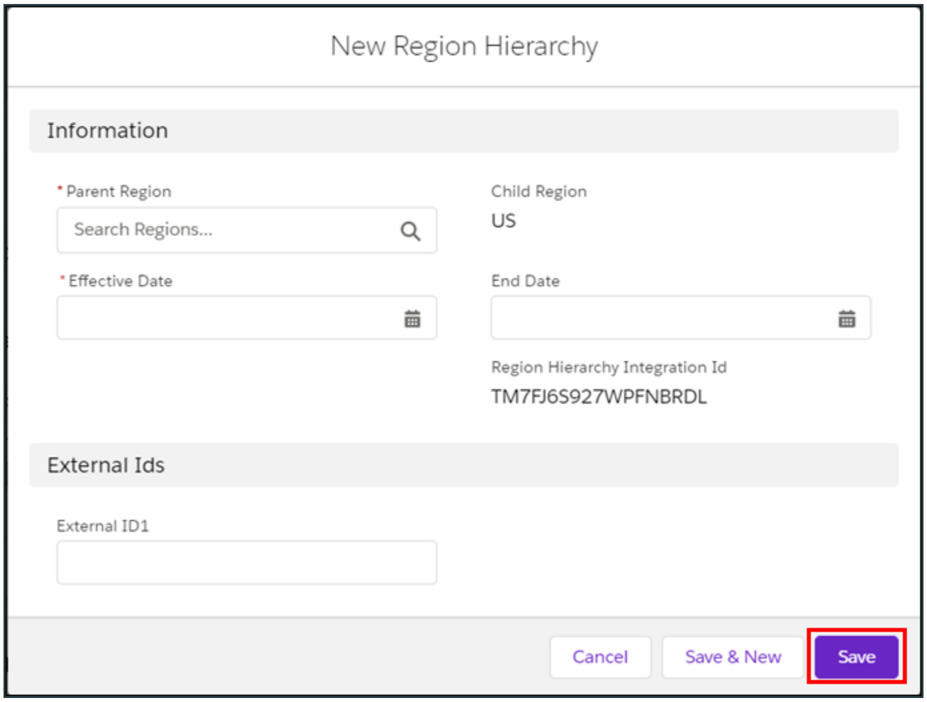
Note: Use the **Search** and **Filters** functions to help you locate the region. See [Search and Filter Functions].



3. Scroll to the **Region Parents** section and click **New**.



4. Enter parent hierarchy information and click **Save**.



For information about the fields, see View Region Information.

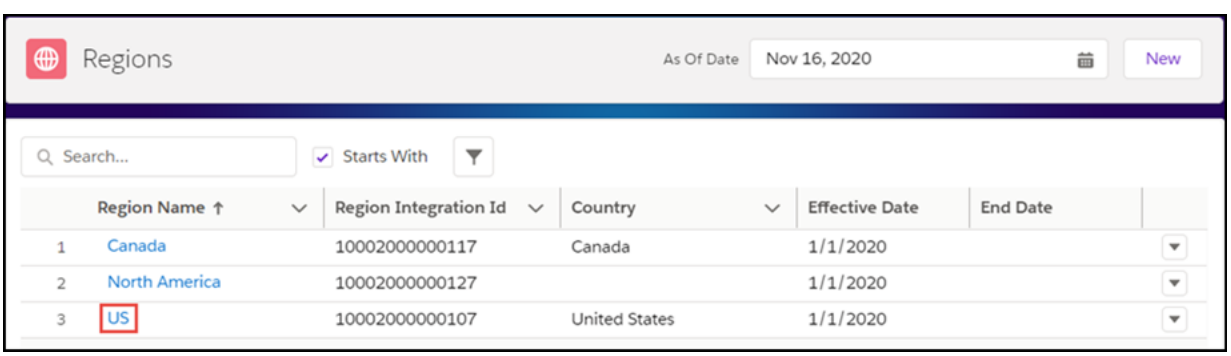
Modify a Parent Hierarchy Linked to a Region

You can make updates to parent hierarchies linked to a region.

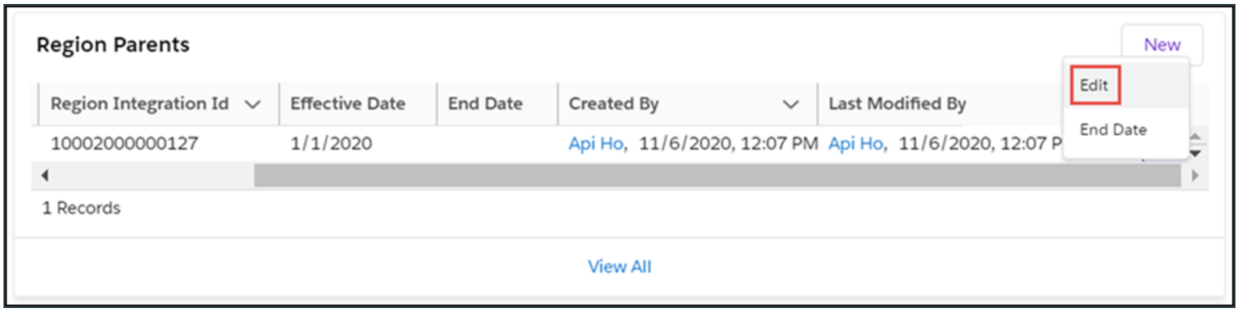
To edit a parent hierarchy linked to a region

1. Click **Regions** from the primary navigation bar.
2. Select the region that has the parent hierarchy you want to make changes to.

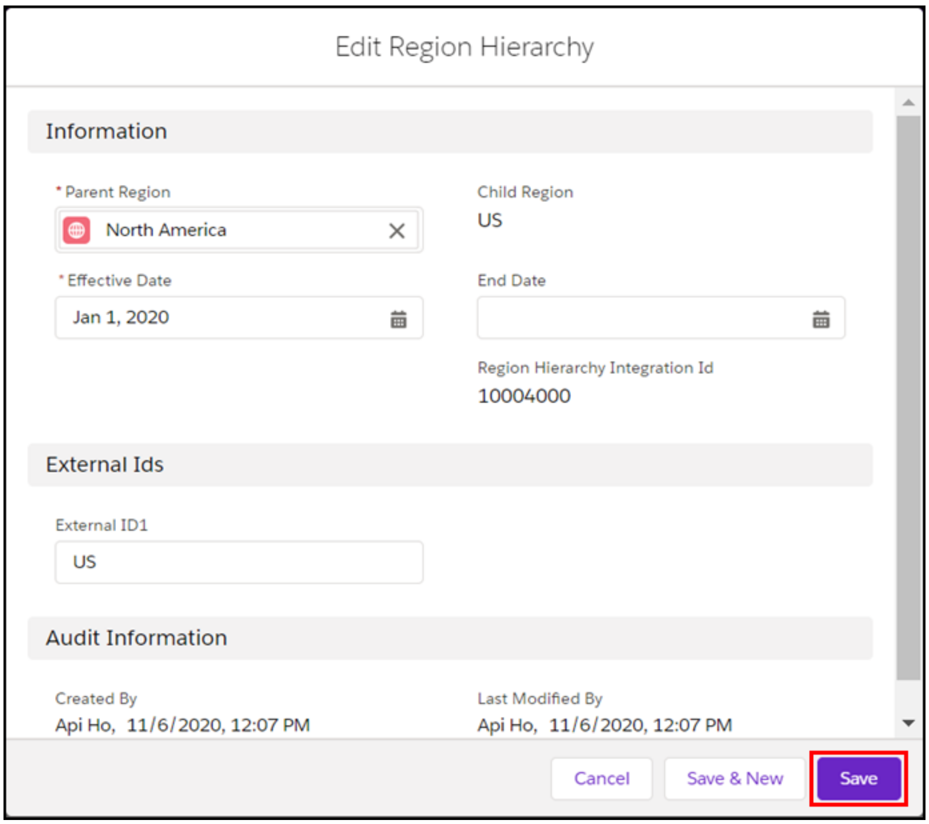
> **Note:** Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.



3. Scroll to the **Region Parents** section, click the drop-down for the hierarchy you want to edit, and then select **Edit**.



4. Modify the parent hierarchy data and click **Save**.



For information about the fields, see View Region Information.

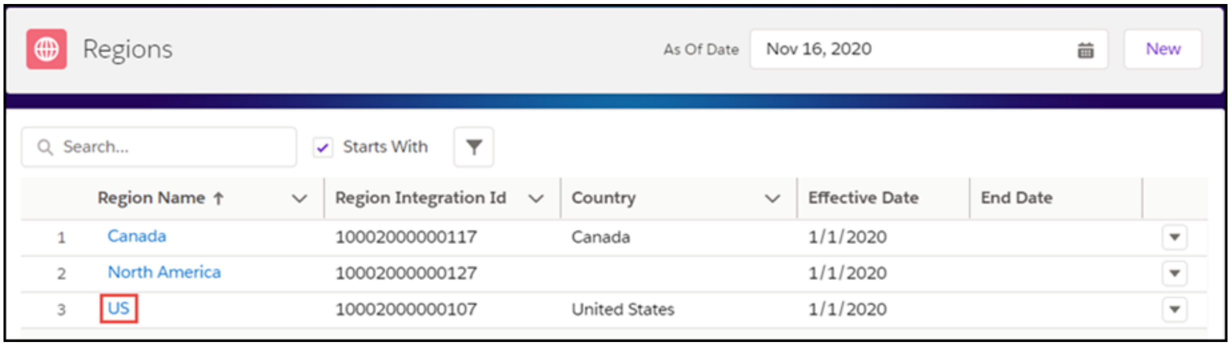
End Date a Parent Hierarchy Linked to a Region

You can end-date (delete) a parent hierarchy linked to a region so it is no longer active/valid as of the end date.

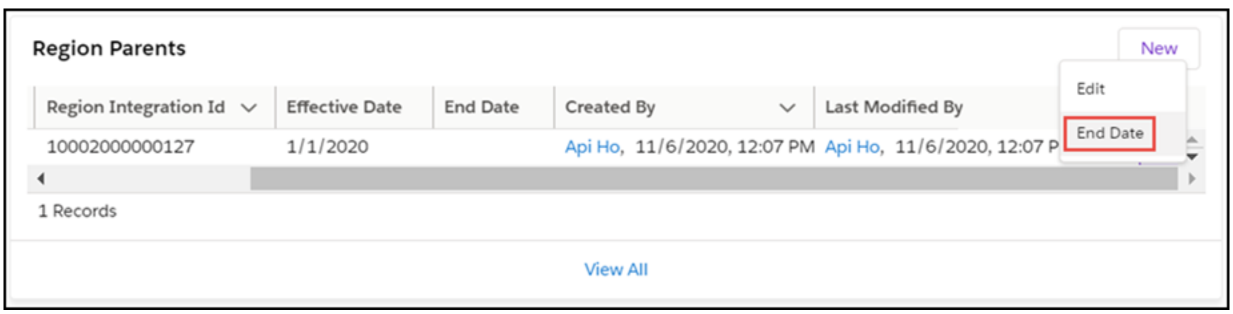
To end date a parent hierarchy linked to a region

1. Click **Region** from the primary navigation bar.
2. Select the region that has the parent hierarchy you want to end date.

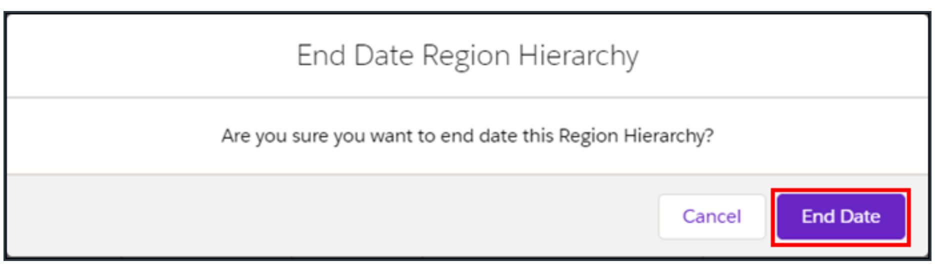
> **Note:** Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.



3. Scroll to the **Region Parents** section, click the drop-down for the hierarchy you want to remove, and then select **End Date**.



4. Click **End Date** to confirm.



Region Child Hierarchies

In the **Region Children** section, you can define child hierarchies for a region. The child regions are below the region in the hierarchy.

You can have many parent-child relationships in the hierarchy. There are no restrictions on having multiple parents for the same child region and multiple children for the same parent region for the same date range.

See:

- Add a Child Hierarchy to a Region
- Modify a Child Hierarchy Linked to a Region
- End Date a Child Hierarchy Linked to a Region

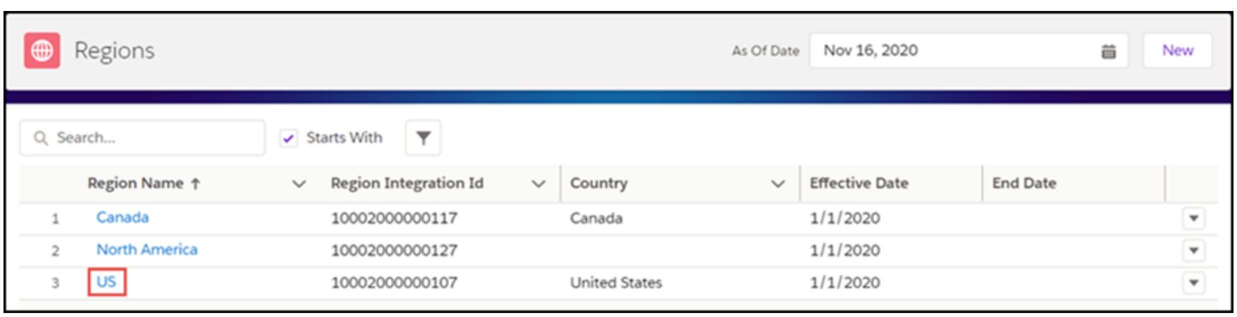
Add a Child Hierarchy to a Region

You can add child hierarchies to a region.

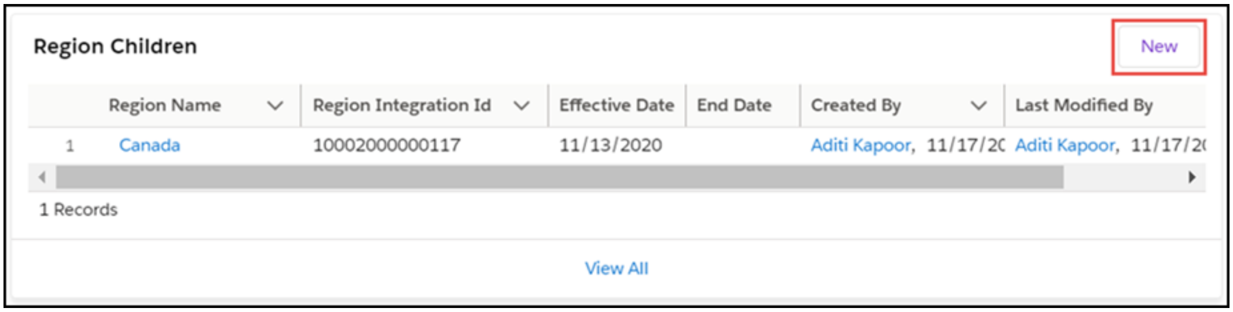
To add a child hierarchy to a region

1. Click **Regions** from the primary navigation bar.
2. Select the region you want to add a child hierarchy to.

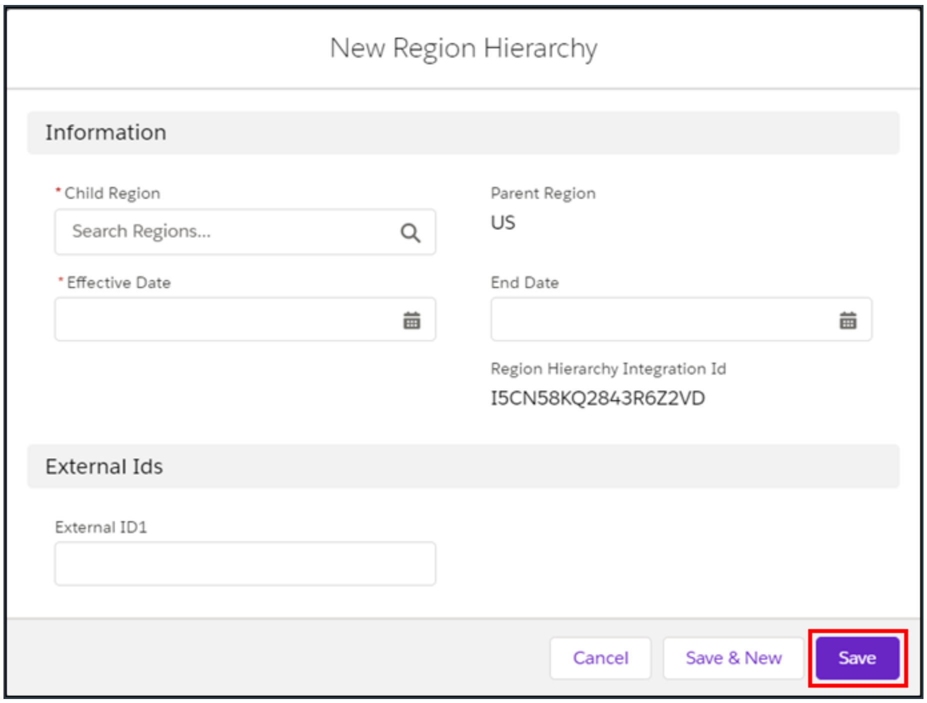
   Note: Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.

3. Scroll to the **Region Children** section and click **New**.



4. Enter child hierarchy information and click **Save**.



For information about the fields, see View Region Information.

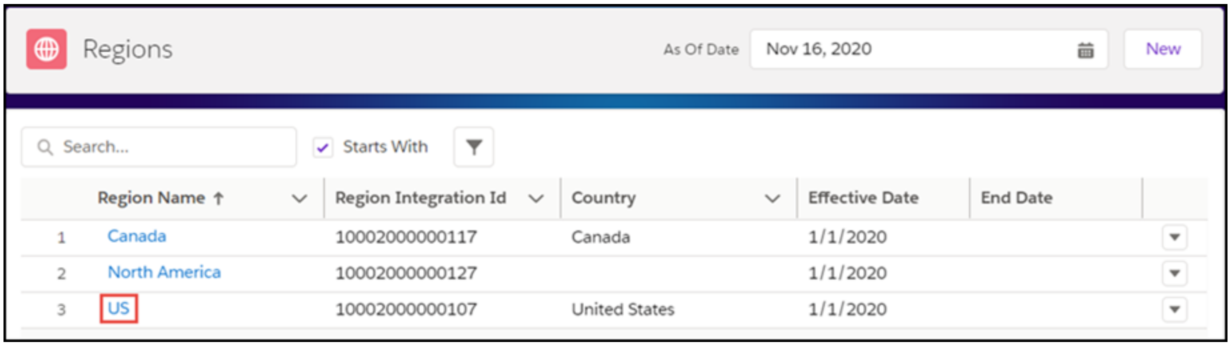
Modify a Child Hierarchy Linked to a Region

You can make updates to child hierarchies linked to a region.

To edit a child hierarchy linked to a region

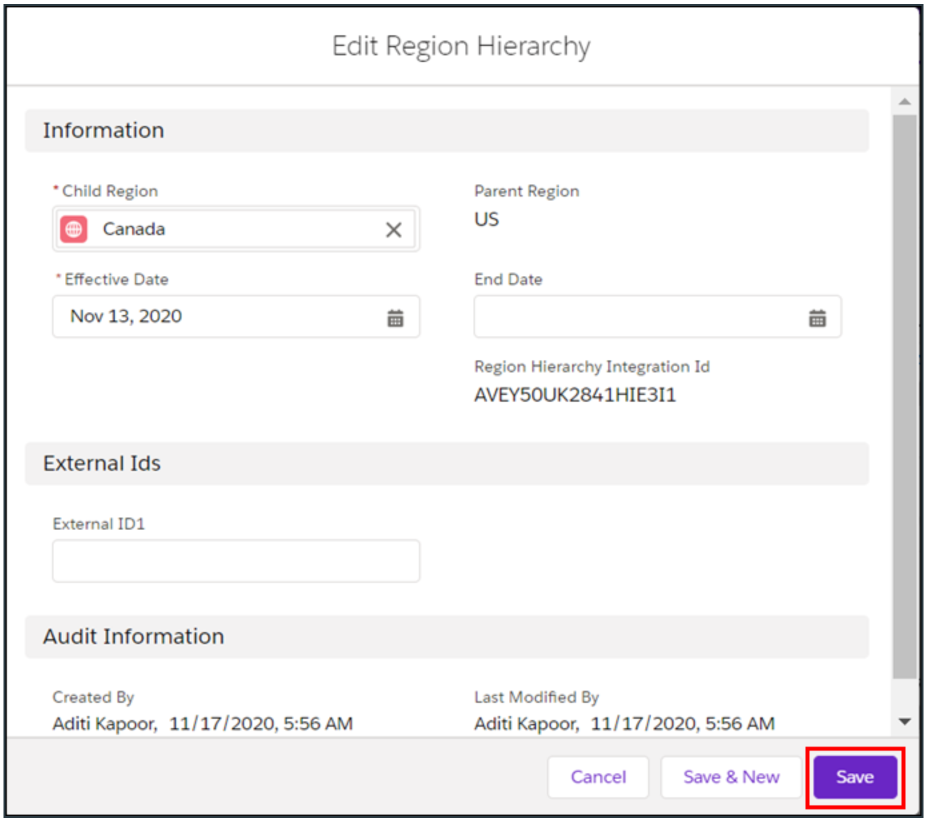
1. Click **Regions** from the primary navigation bar.
2. Select the region that has the child hierarchy you want to make changes to.

> **Note:** Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.



3. Scroll to the **Region Children** section, click the drop-down for the hierarchy you want to edit, and then select **Edit**.

4. Modify the child hierarchy data and click **Save**.



For information about the fields, see View Region Information.

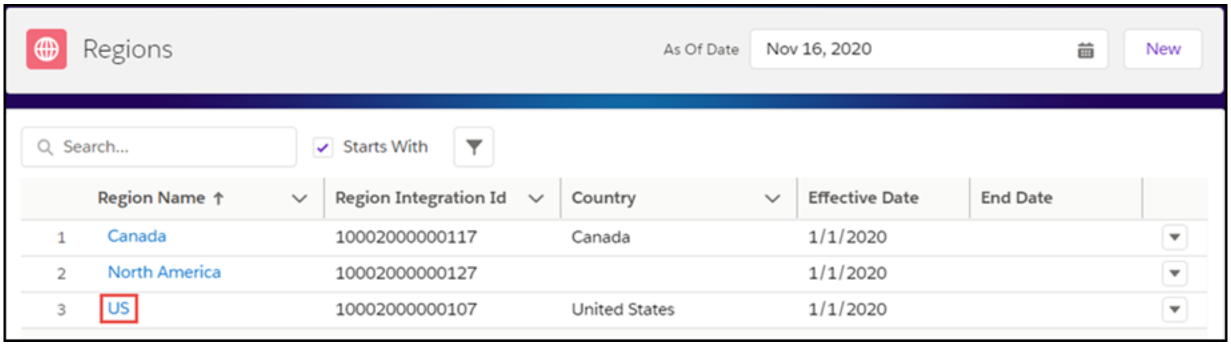
End Date a Child Hierarchy Linked to a Region

You can end date a child hierarchy linked to a region so it is no longer active/valid as of the end date.

To end date a child hierarchy linked to a region

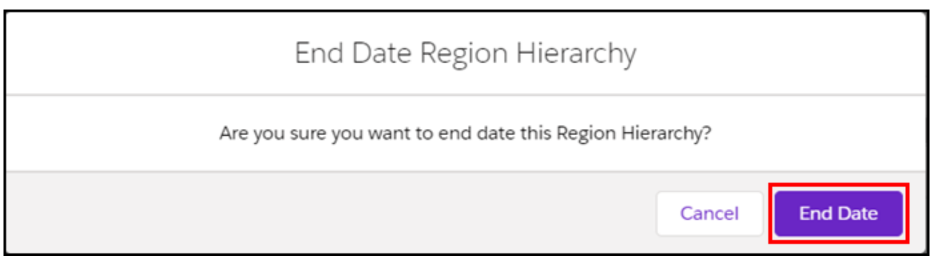
1. Click **Regions** from the primary navigation bar.
2. Select the region that has the child hierarchy you want to end date.

> **Note:** Use the **Search** and **Filters** functions to help you locate the region. See Search and Filter Functions.



3. Scroll to the **Region Children** section, click the drop-down for the hierarchy you want to remove, and then select **End Date**.

4. Click **End Date** to confirm.



Region Company Holidays

The **Company Holidays** tab provides a way to store holidays observed by the specific region.

Company holiday dates may be helpful when working throughout the application. For example, you may consider holidays when calculating working days for an engagement plan.

See:

- Add a Company Holiday to a Region
- Copy a Region's Company Holidays

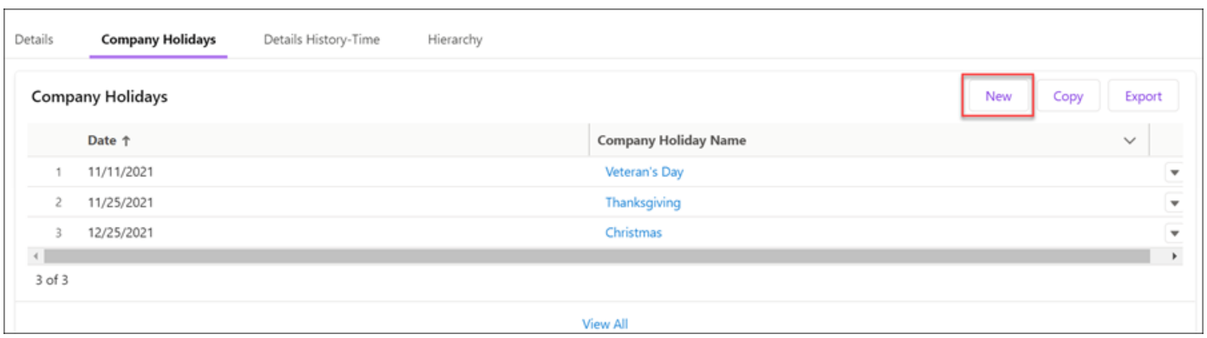
Add a Company Holiday to a Region

You can add company holidays to a region.

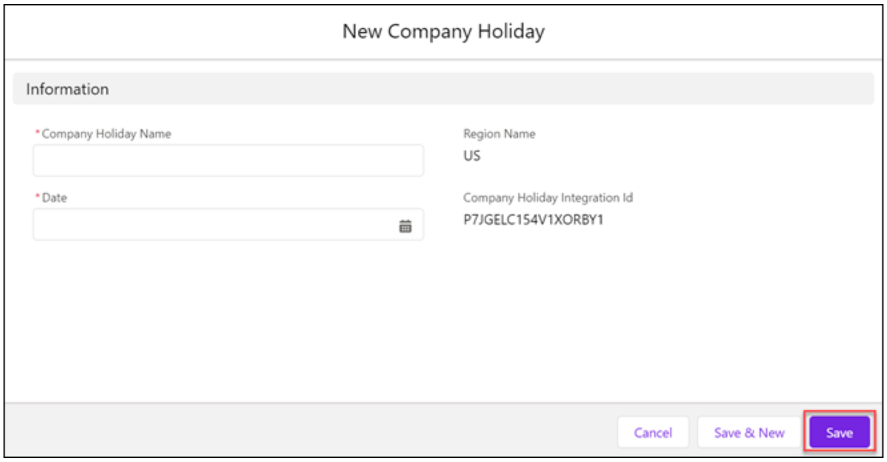
To add a company holiday to a region

1. Click **Regions** from the primary navigation bar.
2. Select the region to which you want to add a company holiday.

3. Select the **Company Holidays** tab and click **New**.



4. Enter the holiday information and click **Save**.



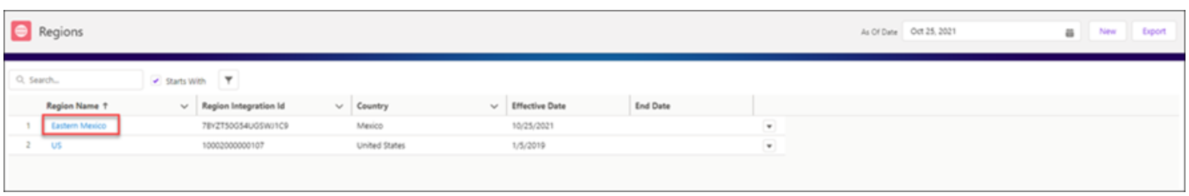
For information about the fields, see Region Company Holidays Tab.

Copy a Region's Company Holidays

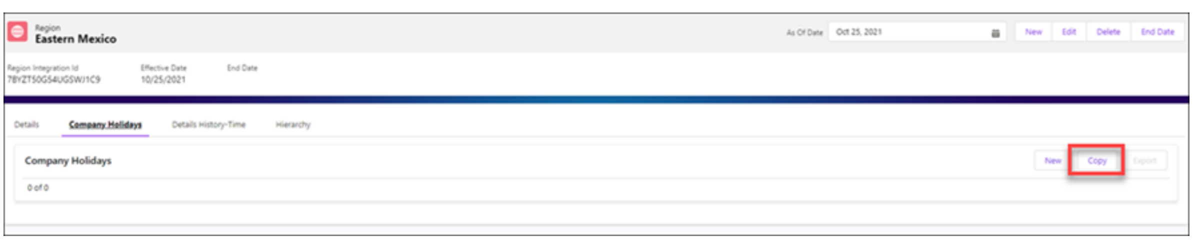
You can copy company holidays from one region to another.

To copy company holidays to another region

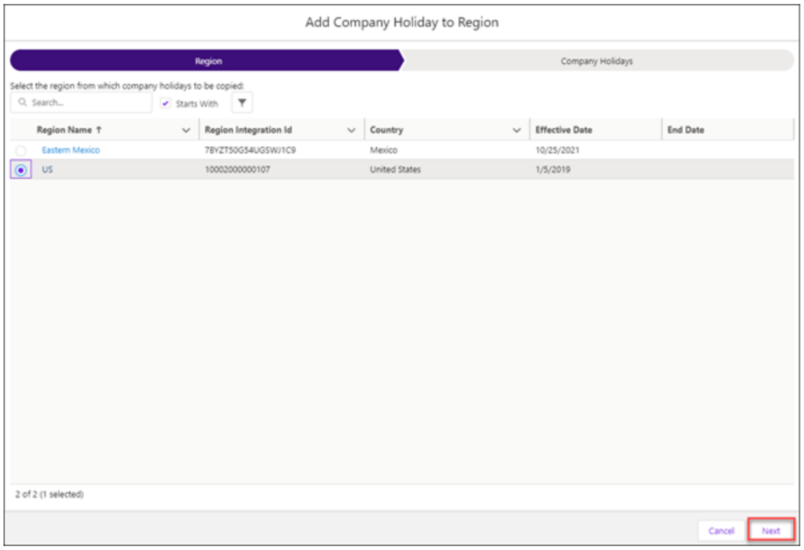
1. Click **Regions** from the primary navigation bar.
2. Select the region to which you want to copy company holidays.



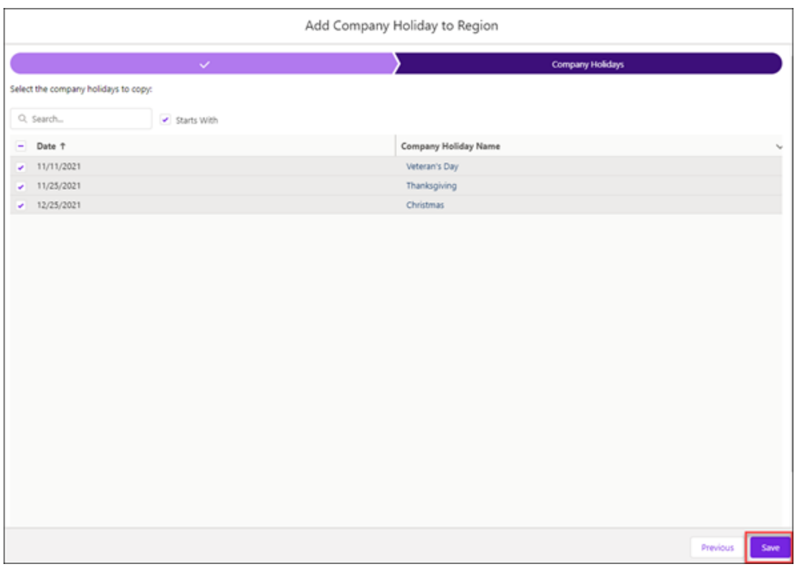
3. Select the **Company Holidays** tab and click **Copy**.



4. Select the region from which you want to copy company holidays and click **Next**.



5. Select the check boxes beside the holiday(s) you want to copy and click **Save**.



The holidays are added to the **Company Holidays** tab.

Manage Sales Forces

A Sales Force is a group of users who promote the same products and messaging. Sales Force is an OCE Optimizer concept allowing for business rules to be set at the sales force level and evaluated down to all the territories within the sales force for CRM systems.

You can add new sales forces for your company's field sales hierarchy, and you can manage existing Sales Forces from within a scenario.

See View Sales Force Information.

View Sales Force Information

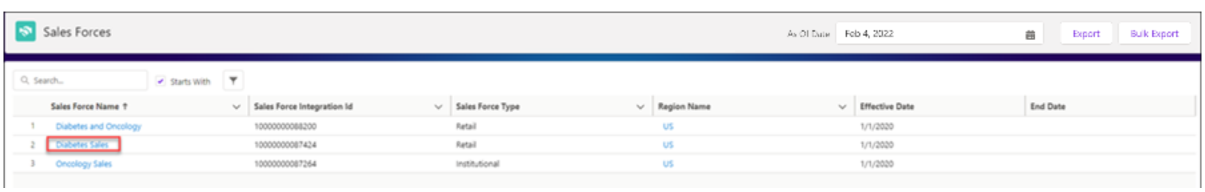
The **Sales Forces** module displays general information about the sales force, product alignments, territories, sales force parents and children, audit information, external IDs, account alignment rules, the history of changes made to the sales force, the history of changes made to the account alignment rules, and the hierarchical structure of the sales force.

Sales Forces listed on the main list page are based on the **As Of Date** field.

To view sales force information

1. Click **Sales Forces** from the primary navigation bar.
2. From the Sales Forces screen, select the sales force you would like to view.

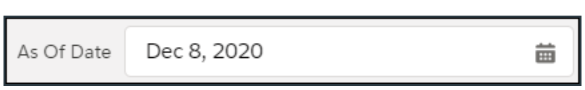
   > **Note:** Use the **Search** and **Filters** functions to help you locate the sales force. See Search and Filter Functions.

3. View the sales force information.

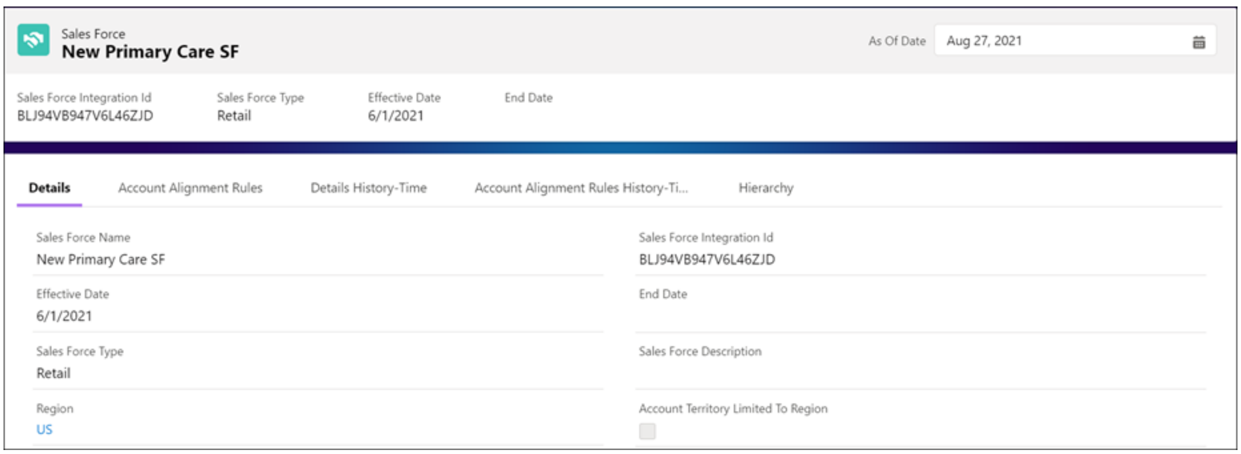
   The Sales Force Name, As Of Date, and the Sales Force highlight section are displayed on the top of the Sales Force entity page for all the Sales Force tabs.

   As Of Date: The data displayed for the sales force is based on the date selected in this field.

Highlight Section

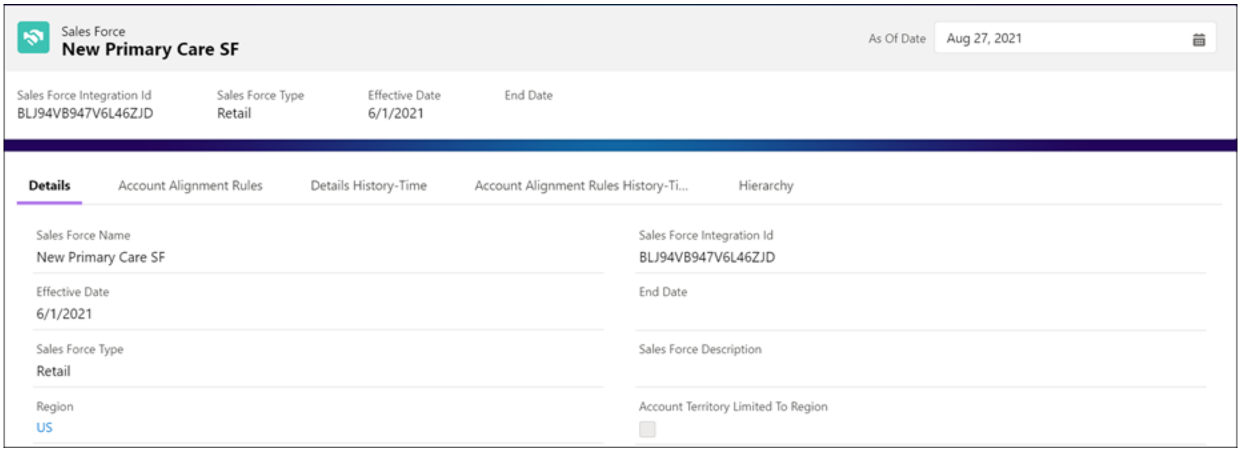
- **Sales Force Name**: Name of the sales force.
- **Sales Force Integration ID**: Unique sales force identification number.
- **Sales Force Type**: The type of sales force, such as Retail, Institutional, Inside Sales, etc.
- **Effective Date**: Indicates the date when the sales force is active/valid.
- **End Date**: Indicates the date after which the sales force is no longer active/valid.



Sales Forces Details Tab

The **Details** tab contains general information about the sales force, product alignments, territories, sales force parents and children, audit information, and external IDs. The data displayed is the current view based on the As Of Date.

General Information

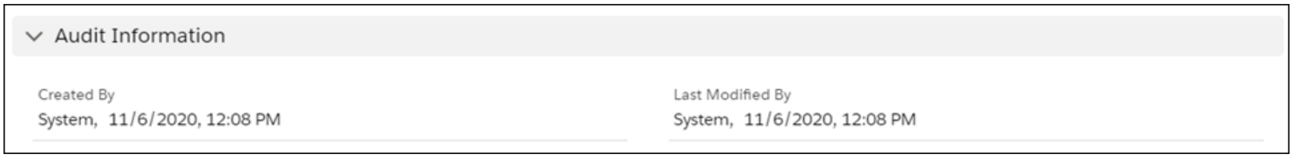


- **Sales Force Name**: Name of the sales force.
- **Sales Force Integration ID**: Unique sales force identification number.
- **Effective Date**: Indicates the date when the sales force is active/valid.
- **End Date**: Indicates the date after which the sales force is no longer active/valid.
- **Sales Force Type**: The type of sales force, such as Retail, Institutional, Inside Sales, etc.
- **Sales Force Description**: The description of the sales force.
- **Account Territory Limited to Region**: Select this box to ensure that accounts outside the sales force region will not be assigned to the territories in this sales force by any rule. You are restricted to accounts in the territories' sales force region and child regions for Account Territory Explicit/Exclusion. If this box is not selected, if the rule is based on affiliations or the entire universe of accounts, it is possible to assign accounts from other regions.
- **Region**: The region the sales force is aligned to.

External IDs

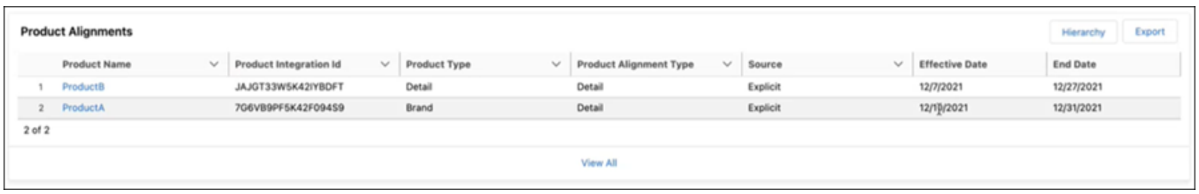
- **External ID1—ID5**: Additional identification numbers for cross referencing.

Audit Information



- **Created By**: A combination of the creator's user name and the date/time the sales force was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the sales force and the date/time it was updated.

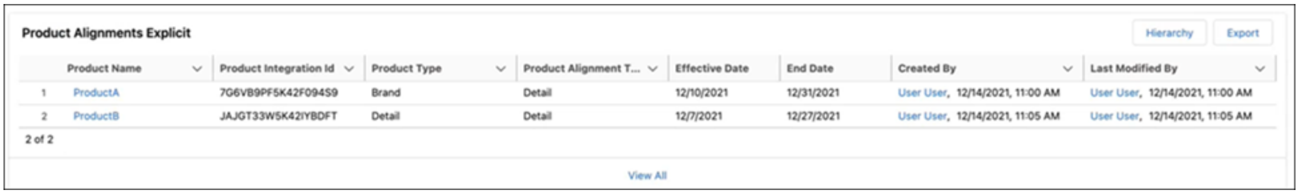
Product Alignments



- **Product Name**: Name of the cascaded product aligned to the sales force.
- **Product Integration ID**: Unique product identification number of the product aligned to the sales force.
- **Product Type**: Type of product.
- **Product Alignment Type**: The purpose for the product alignment. For example, Detail, Sales, etc.
- **Source**: *Explicit* (product directly aligned to sales force) or *Cascade* (parent product aligned to sales force and parent-child hierarchy).
- **Effective Date**: Indicates the date when the product is active/valid.
- **End Date**: Indicates the date after which the product alignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the product alignment was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the product alignment and the date/time it was updated.

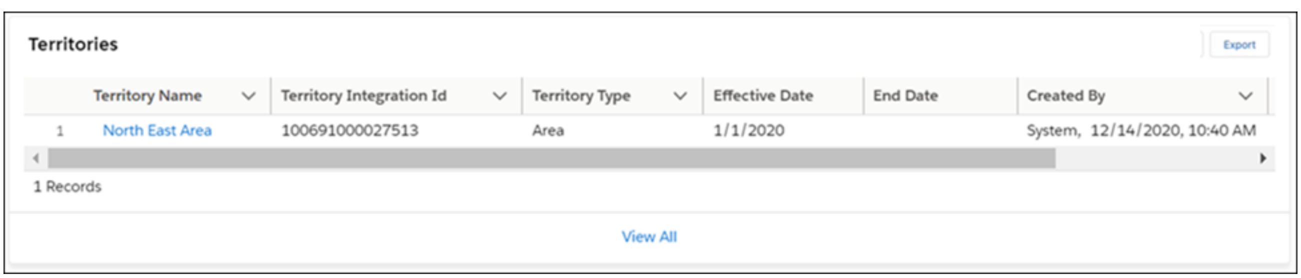
- **Hierarchy**: Click to view a pop-up of a hierarchical chart view of aligned products. For more information on reading the hierarchical chart, see Product Hierarchy Tab.
- **Export**: Click to export aligned products into a file.

Product Alignments Explicit



- **Product Name**: Name of the product directly (explicitly) aligned to the sales force.
- **Effective Date**: Indicates the date when the product is active/valid.
- **End Date**: Indicates the date after which the product alignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the product alignment was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the product alignment and the date/time it was updated.
- **Hierarchy**: Click to view a pop-up of a hierarchical chart view of aligned products. For more information on reading the hierarchical chart, see Product Hierarchy Tab.
- **Export**: Click to export aligned products into a file.

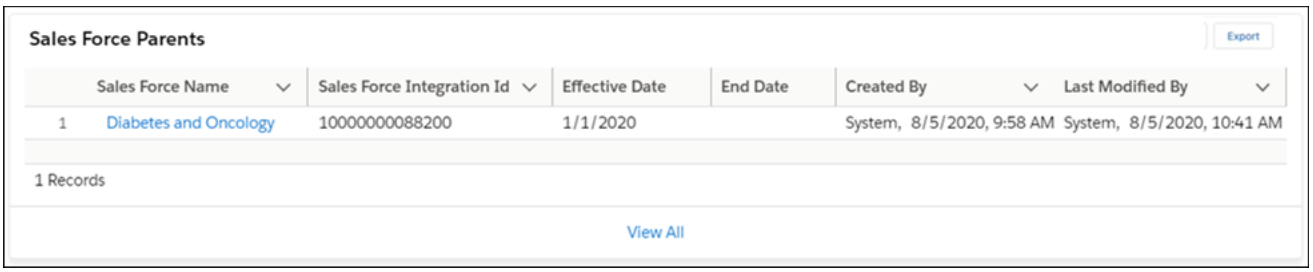
Territories



- **Territory Name**: Name of the territory within the sales force.
- **Territory Integration ID**: Unique territory identification number of the territory within the sales force.
- **Territory Type**: The type of territory.

- **Effective Date**: Indicates the date when the territory is active/valid.
- **End Date**: Indicates the date after which the territory is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the territory was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the territory and the date/time it was updated.

Sales Force Parents


Sales Force Parents

Export

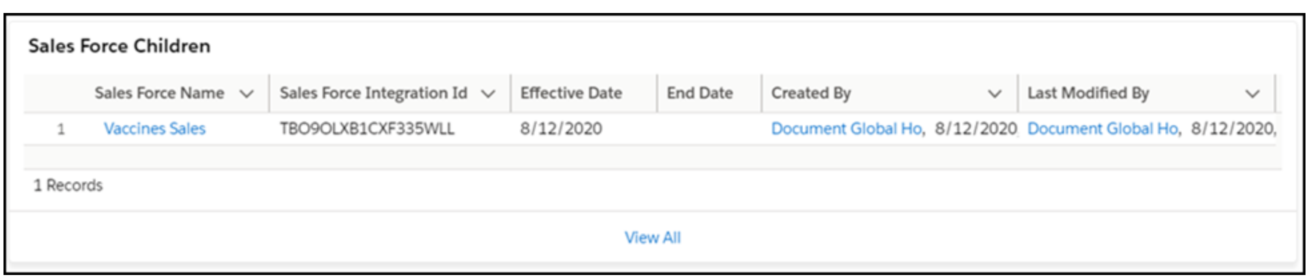
	Sales Force Name	Sales Force Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Diabetes and Oncology	10000000088200	1/1/2020		System, 8/5/2020, 9:58 AM	System, 8/5/2020, 10:41 AM

1 Records

View All

- **Sales Force Name**: Name of the parent sales force.
- **Sales Force Integration ID**: Unique sales force identification number of the parent sales force.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the sales force hierarchy was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the sales force hierarchy and the date/time it was updated.

Sales Force Children


Sales Force Children

	Sales Force Name	Sales Force Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Vaccines Sales	TBO9OLXB1CXF335WLL	8/12/2020		Document Global Ho, 8/12/2020	Document Global Ho, 8/12/2020,

1 Records

View All

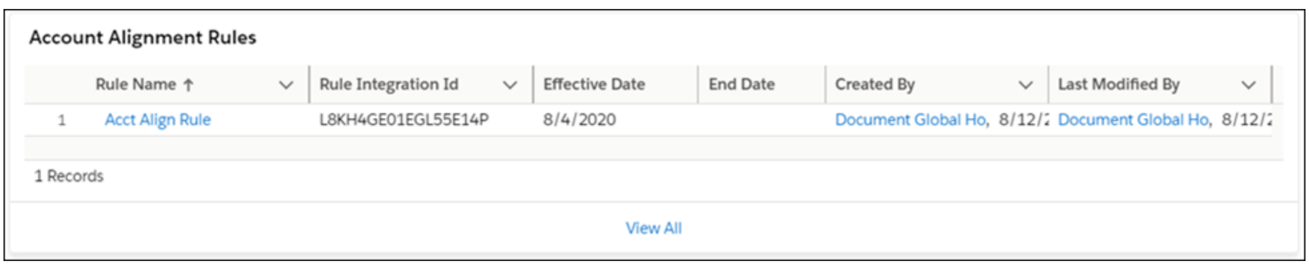
- **Sales Force Name**: Name of the child sales force.
- **Sales Force Integration ID**: Unique sales force identification number of the child sales force.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the sales force hierarchy was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the sales force hierarchy and the date/time it was updated.

Sales Forces Account Alignment Rules Tab

The **Account Alignment Rules** tab displays the account alignment rules defined for the sales force and the account exclusions defined for the sales force. An account excluded at sales force level is not considered in the dynamic alignment rules evaluation.

The data displayed is the current view based on the As Of Date.

Account Alignment Rules



- **Rule Name**: Name of the rule.
- **Rule Integration ID**: Unique rule identification number.
- **Effective Date**: Indicates the date when the rule is active/valid.
- **End Date**: Indicates the date after which the rule is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the rule was created.
- **Last Modified By**: A combination of the user name of the last person to edit the rule and the date/time it was updated.

Account Exclusions

Account Exclusions

	Account Name	Account Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Baff, Renata	9600500005417679	8/7/2020		Document Global Ho, 8/7/2(	Document Global Ho, 8/7/2(

1 Records

View All

- **Account Name**: Name of the account excluded from the sales force.
- **Account Integration ID**: Unique account identification number of the account excluded from the sales force.
- **Effective Date**: Indicates the date when the account exclusion is active/valid.
- **End Date**: Indicates the date after which the account exclusion is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account exclusion was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account exclusion and the date/time it was updated.

Sales Forces Details History-Time Tab

The **Details History-Time** tab displays the same information as the **Details** tab, except it shows all past, current, and future views of sales force details. This tab also displays the audit history of key fields.

Field History

Field History

	Date	Field	Full Name	Old Value	New Value	Scenario Name	Scenario Integration Id
1	9/6/2022, 07:28 AM	created					

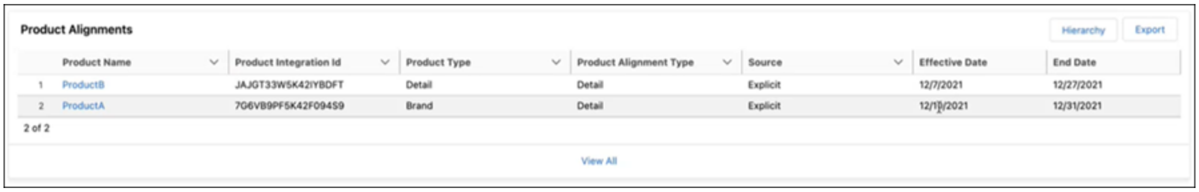
1 of 1

View All

- **Date**: The date and time the field was modified.
- **Field**: The name of the field that was modified.
- **Full Name**: The user name of the person who modified the field.
- **Old Value**: The previous value of the field.
- **New Value**: The current value of the field.

- **Scenario Name**: The scenario associated with the field modification.
- **Scenario Integration Id**: The scenario integration identification number associated with the field modification.

Product Alignments



Product Alignments

	Product Name	Product Integration Id	Product Type	Product Alignment Type	Source	Effective Date	End Date
1	ProductB	JAJGT33W5K42IYBDFT	Detail	Detail	Explicit	12/7/2021	12/27/2021
2	ProductA	7G6VB9PF5K42F094S9	Brand	Detail	Explicit	12/10/2021	12/31/2021

2 of 2

View All

For details on the fields in this section, see the **Product Alignments** section in Sales Forces Details Tab.

Product Alignments Explicit

Product Alignments Explicit

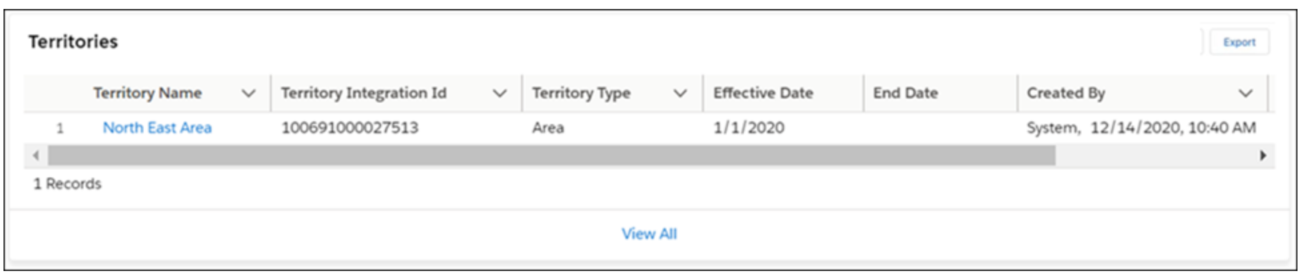
	Product Name	Product Integration Id	Product Type	Product Alignment T...	Effective Date	End Date	Created By	Last Modified By
1	ProductA	7G6VB9PF5K42F094S9	Brand	Detail	12/10/2021	12/31/2021	User User, 12/14/2021, 11:00 AM	User User, 12/14/2021, 11:00 AM
2	ProductB	JAJGT33W5K42IYBDFT	Detail	Detail	12/7/2021	12/27/2021	User User, 12/14/2021, 11:05 AM	User User, 12/14/2021, 11:05 AM

2 of 2

View All

For details on the fields in this section, see the **Product Alignments Explicit** section in Sales Forces Details Tab.

Territories



Territories

	Territory Name	Territory Integration Id	Territory Type	Effective Date	End Date	Created By
1	North East Area	100691000027513	Area	1/1/2020		System, 12/14/2020, 10:40 AM

1 Records

View All

For details on the fields in this section, see the **Territories** section in Sales Forces Details Tab.

Sales Force Parents

Sales Force Parents Export

	Sales Force Name	Sales Force Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Diabetes and Oncology	10000000088200	1/1/2020		System, 8/5/2020, 9:58 AM	System, 8/5/2020, 10:41 AM

1 Records

View All

For details on the fields in this section, see the **Sales Force Parents** section in Sales Forces Details Tab.

Sales Force Children

Sales Force Children

	Sales Force Name	Sales Force Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Vaccines Sales	TBO9OLXB1CXF335WLL	8/12/2020		Document Global Ho, 8/12/2020	Document Global Ho, 8/12/2020,

1 Records

View All

For details on the fields in this section, see the **Sales Force Children** section in Sales Forces Details Tab.

Sales Forces Account Alignment Rules History-Time Tab

The **Account Alignment Rules History-Time** tab displays the same information as the **Account Alignment Rules** tab, except it shows all past, current, and future views of account alignment rules and account exclusions.

Account Alignment Rules

Account Alignment Rules

	Rule Name ↑	Rule Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Acct Align Rule	L8KH4GE01EGL55E14P	8/4/2020		Document Global Ho, 8/12/:	Document Global Ho, 8/12/:

1 Records

View All

For details on the fields in this section, see the **Account Alignment Rules** section in Sales Forces Account Alignment Rules Tab.

Account Exclusions

Account Exclusions

	Account Name	Account Integration Id	Effective Date	End Date	Created By		Last Modified By	
1	Baff, Renata	9600500005417679	8/7/2020		Document Global Ho,	8/7/2(	Document Global Ho,	8/7/2(

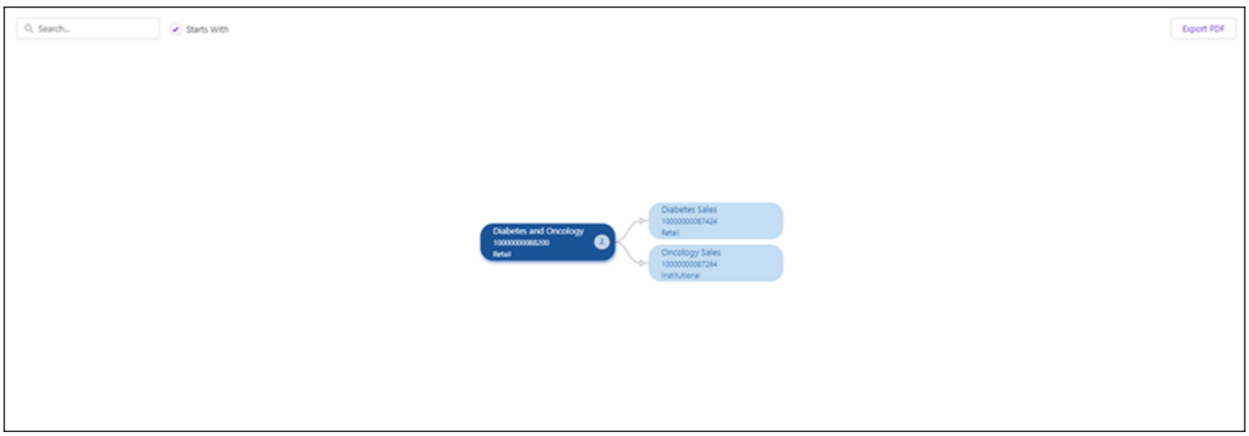
1 Records

View All

For details on the fields in this section, see the **Account Exclusions** section in Sales Forces Account Alignment Rules Tab.

Sales Forces Hierarchy Tab

The **Sales Force Hierarchy** tab displays the sales force parent-child hierarchy in a pictorial form. The data displayed is based on the **As Of Date** field.



The hierarchy diagram displays the selected sales force in the middle. If the sales force has parent sales forces linked to it, they are displayed to the left. If the sales force has child sales forces linked to it, they are displayed to the right.

Each node contains the sales force name, integration ID, and sales force type. If the sales forces have parent and child sales forces linked to them, the node changes from light blue to dark blue when expanded. The total number of linked parent/child sales forces are displayed in the node (parent number is on the left and child number is on the right).

To view the details of a Sales Force, click the sales force name in the node.

To export hierarchy chart results to a PDF file, click **Export PDF**.

Manage Products

You can maintain a product roster and align products to sales forces via the **Products** module. Using this module, you can build a hierarchy of products and maintain ID cross references across multiple vendors/applications.

See:

- View Product Information
- Product Creation
- Import Product Data Using CSV Files
- Product Parent Hierarchies
- Product Child Hierarchies

View Product Information

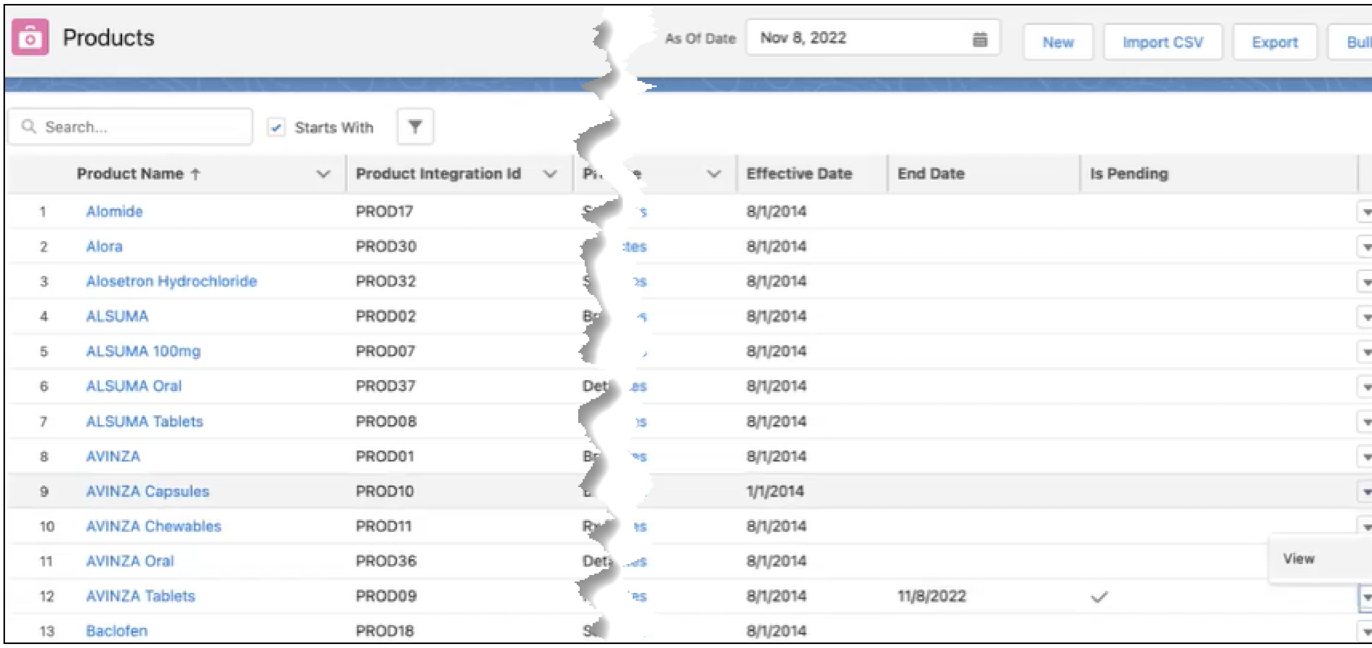
The **Products** module displays general information about the product, alignments at the sales force level and overrides at the territory level, historical and future data views, and a tree view structure of the product hierarchy.

Products listed on the main list page are based on the **As Of Date** field.

To view product information

1. Click **Products** from the primary navigation bar.
2. Select the product you would like to view.

   Note: Use the **Search** and **Filters** functions to help you locate the product. See Search and Filter Functions.



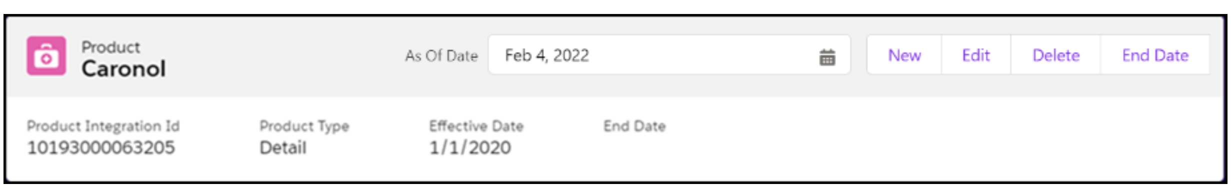
3. View the product information.

The Product Name, As Of Date, actions available for the Product entity, and the Product highlight section are displayed on the top of the Product entity page for all the Product tabs.

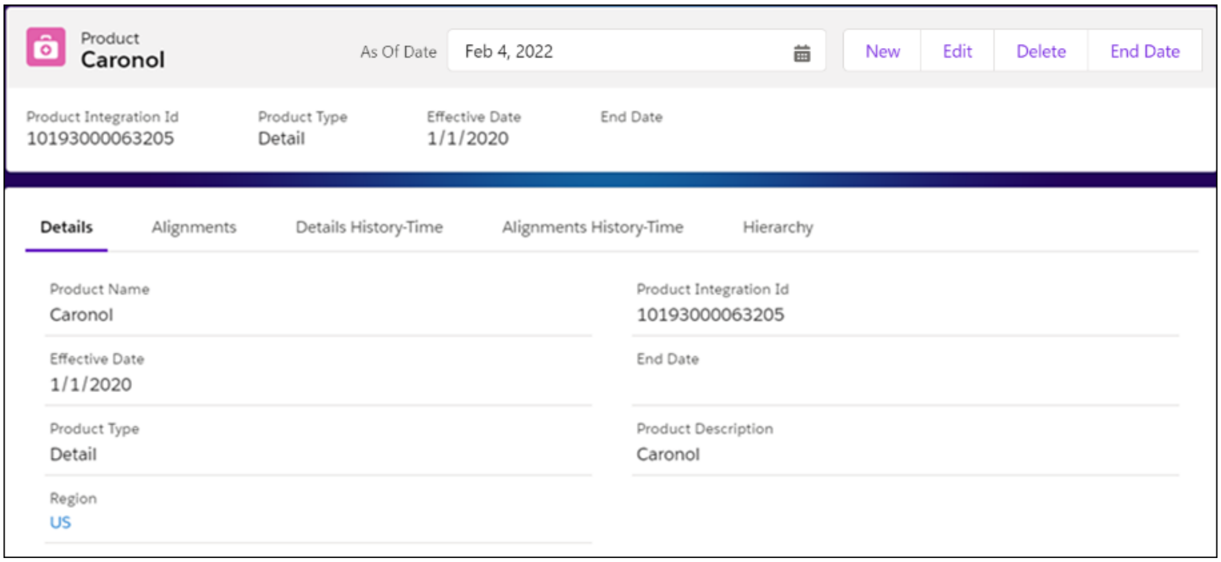
As Of Date and Actions

- **As Of Date**: The data displayed for the product is based on the date selected in this field.
- **Edit**: If applicable, click to make modifications to the product information.
- **Delete**: If applicable, click to remove the product from the system.
- **End Date**: If applicable, click to end date the product, so it is no longer active/valid as of this date.

Highlight Section



- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product. For example, Market, Brand, Detail, Sample, etc.
- **Effective Date**: Indicates the date when the product is active/valid.
- **End Date**: Indicates the date after which the product is no longer active/valid.



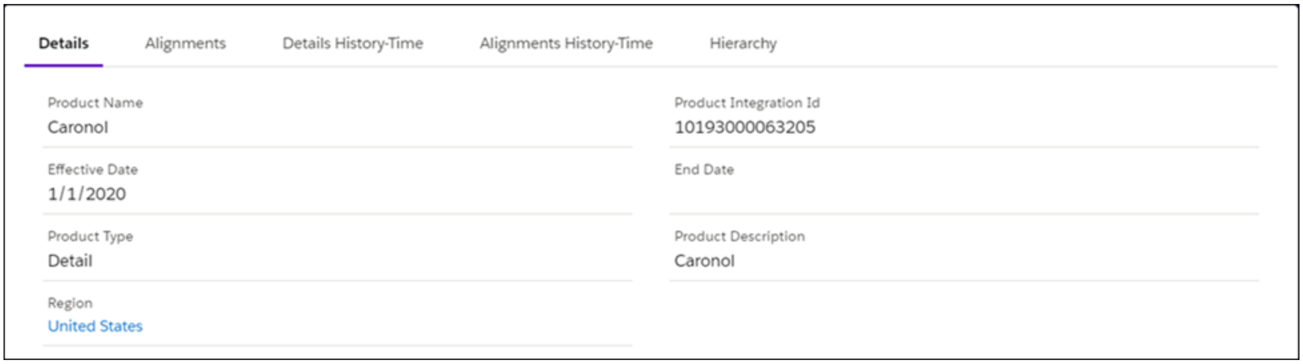
Product Details Tab

The **Details** tab contains general information about the product, including sample and consumer health information, external IDs, audit information, and parent and child products.

Much of the information is included for integration with OCE Sales, allowing for product data to be managed in a single place.

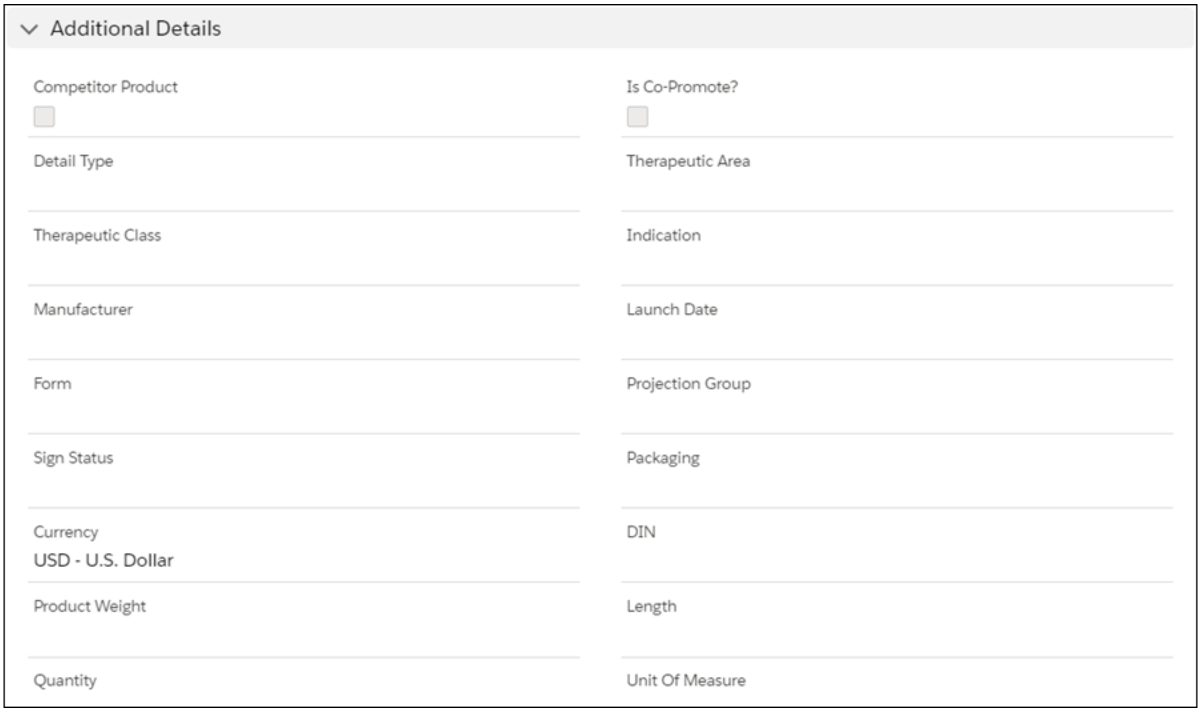
The **Details** tab displays current data based on the As Of Date.

General Information



- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number. Based on a parameter setting, this can be a system auto-generated value or user entered value.
- **Effective Date**: Indicates the date when the product is active/valid.
- **End Date**: Indicates the date after which the product is no longer active/valid.
- **Product Type**: The type of product. For example, Market, Brand, Detail, Sample, etc.
- **Product Description**: Description of the product.
- **Region**: The region the product is assigned to.

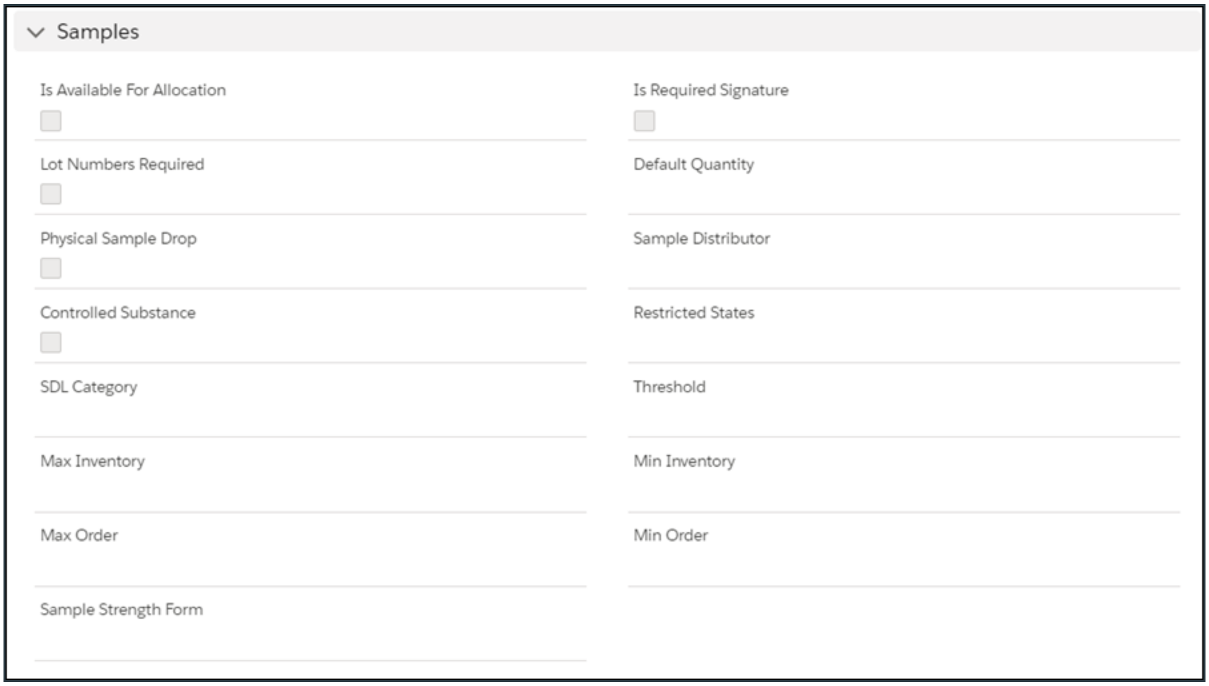
Additional Details



- **Competitor Product**: If checked, this is a competitor product.
- **Manufacturer**: The manufacturer of the product.
- **Is Co-Promote?**: If checked, the product is being co-promoted by/with another company.
- **Launch Date**: The launch date of the product.
- **Sign Status**: Indicates whether a signature is required. Selections are *Mandatory*, *Optional*, or *Not Required* (default).
- **Detail Type**: Type of the Detail, such as *Brand*, *Indication*, *Brand-Indication*, *Regimen*, *Regimen-Indication*, or *Therapeutic Area*.
- **Projection Group**: Used to group products together.
- **Form**: The appearance of the product.
- **Sample Strength Form**: How much of the active ingredient is present in each sample.
- **Therapeutic Area**: The area of medical practice that includes groupings of specific diseases and/or disorders generally treated by a specific medical specialty, such as oncology, cardiovascular, neurology or hematology.
- **Therapeutic Class**: A class of products that are used to treat similar medical conditions.

- **Indication**: The use of the product for treating a particular disease.
- **Packaging**: The type of packaging the product is contained in.
- **Product Weight**: The weight of the product.
- **Length**: The number of products sold within a product line.
- **Quantity**: the available amount of the product.
- **Unit of Measure**: Unit of which a quantity is accounted for, such as Pack, Case, etc.
- **Quantity Per Pack**: The available amount of the product per pack.
- **Quantity Per UOM**: The unit of measure amount of the product.
- **Currency**: The type of currency, such as US Dollar, European Euro, Japanese Yen, or British Pound.
- **SKU**: Stock-keeping unit; a unique identifying number of the product.
- **Price Per Unit**: The cost of one unit of the product.
- **NDC Code**: National Drug Code; a unique number that identifies the product.
- **Average Price**: The dollar amount the product is sold for.
- **DIN**: The drug identification number of the product.

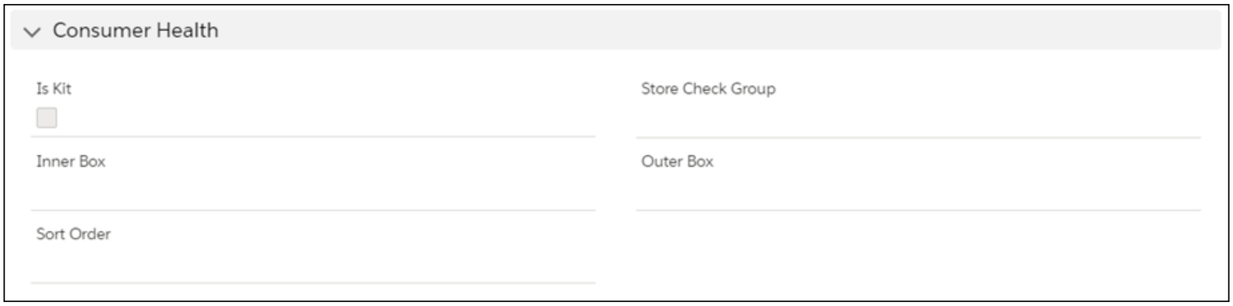
Samples



- **Is Available for Allocation**: Box is checked if product is available for allocation.
- **Is Required Signature**: Box is checked if a signature is required.
- **Lot Numbers Required**: Box is checked if the lot numbers of the product are required.
- **Default Quantity**: The default number of samples or items that can be disbursed for the product.
- **Physical Sample Drop**: Indicates if the Product is a physical sample drop or a virtual sample drop. If virtual, the Product gets directly sent to a doctor.
- **Sample Distributor**: The name of the sample distributor.
- **Controlled Substance**: Box is checked if the product is a controlled substance.
- **Restricted States**: The states where the Product cannot be sampled, if any.
- **SDL Category**: Type of SDL License.
- **Threshold**: The minimum amount of inventory required to keep on hand.
- **Min Inventory**: The minimum quantity of products that have to be available.
- **Max Inventory**: The maximum quantity of products that have to be available.

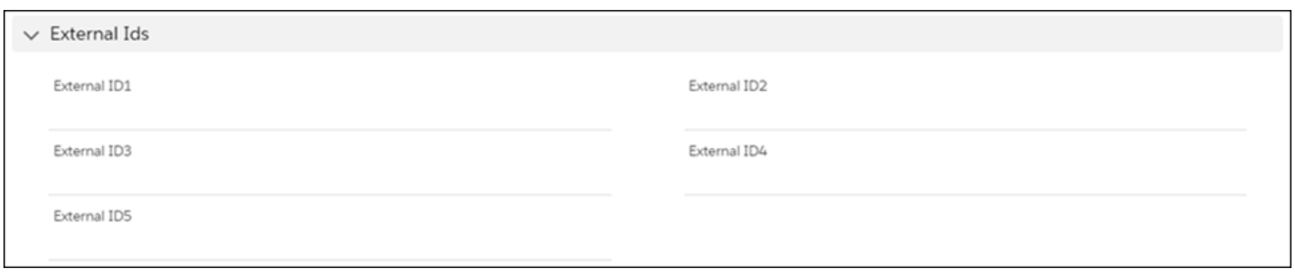
- **Min Order**: The lowest set amount of product that the supplier will sell.
- **Max Order**: The maximum amount of product that can be ordered at a given time.

Consumer Health



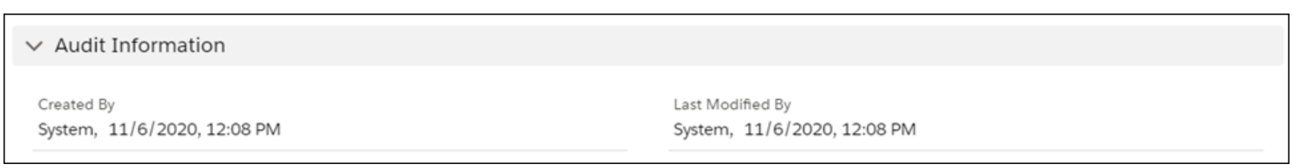
- **Is Kit**: Box is checked if product is a kit.
- **Store Check Group**: Used to group together products in the Store Check.
- **Inner Box**: The number of units in a pack.
- **Outer Box**: The number of packs in a carton.
- **Sort Order**: The order in which products are displayed, for example, Product Name (A-Z) or Product Price (Low-High).

External IDs



- **External ID1—ID5**: Additional identification numbers for cross referencing.

Audit Information



- **Created By**: A combination of the creator's user name and the date/time the product was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the product and the date/time it was updated.

Parent Products

Parent Products

New Export

	Product Name	Product Integration Id	Product Type	Cascade Product Alignment	Effective Date	End Date ↑
1	Neurology	10048000062054	Brand	✓	10/20/2021	

1 of 1

View All

- **Product Name**: The name of the parent product.
- **Product Integration ID**: System -generated product identification number.
- **Product Type**: The type of product, such as Product, Indication, Therapeutic Area, or Brand.
- **Cascade Product Alignment**: Select to automatically align a parent product and child products.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.

Child Products

Child Products

New Export

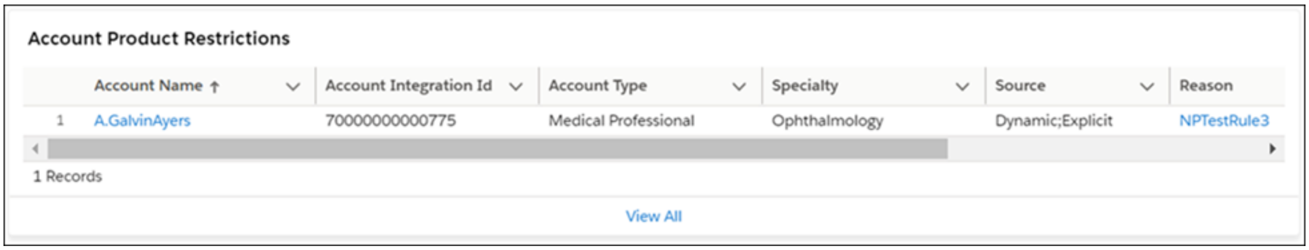
	Product Name	Product Integration Id	Product Type	Cascade Product Alignment	Effective Date	End Date
1	Caronol-75mg	100328000004177	Sample		1/1/2020	
2	Caronol-50mg	10047000011391	Sample		1/1/2020	
3	Caronol-25mg	100691000027391	Sample		1/1/2020	
4	Caronol-100mg	100691000027403	Sample		1/1/2020	

4 of 4

- **Product Name**: The name of the child product.
- **Product Integration ID**: System -generated product identification number.
- **Product Type**: The type of product, such as Product, Indication, Therapeutic Area, or Brand.
- **Cascade Product Alignment**: Select to automatically align a parent product and child products.

- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **IsPending**: When you create a product outside the scenario, the system creates an internal scenario to process the request. A check mark is displayed in the column while the product is pending and disappears after the scenario is processed.

Account Product Restrictions



Account Product Restrictions

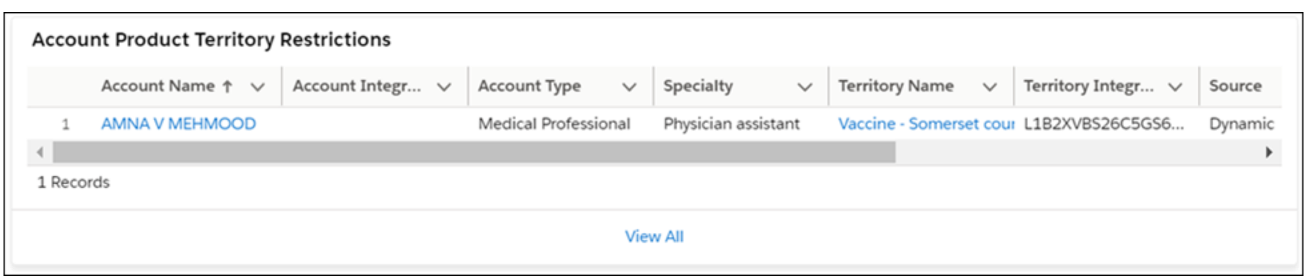
	Account Name ↑	Account Integration Id	Account Type	Specialty	Source	Reason
1	A.GalvinAyers	70000000000775	Medical Professional	Ophthalmology	Dynamic;Explicit	NPTestRule3

1 Records

View All

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Specialty**: Area of expertise.
- **Source**: *Dynamic* or *Explicit*.
- **Reason**: Lists rules' names involved in the account product restriction.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.

Account Product Territory Restrictions



Account Product Territory Restrictions

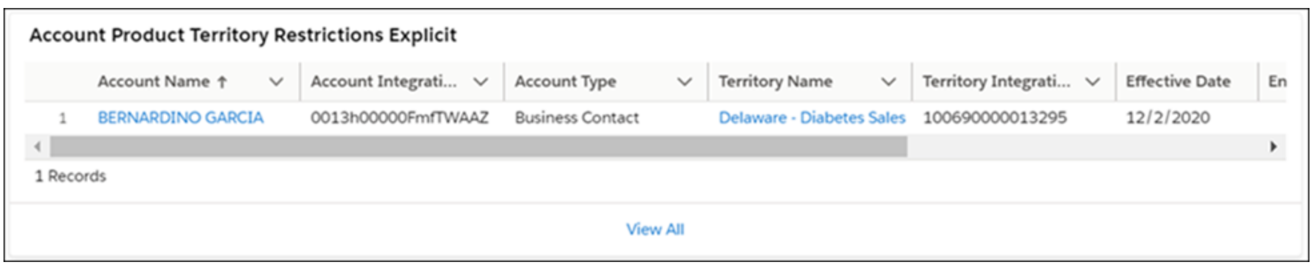
	Account Name ↑	Account Integr...	Account Type	Specialty	Territory Name	Territory Integr...	Source
1	AMNA V MEHMOOD		Medical Professional	Physician assistant	Vaccine - Somerset cour	L1B2XVBS26C5GS6...	Dynamic

1 Records

View All

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Type of account, such as *Business Contact*.
- **Specialty**: Area of expertise.
- **Territory Name**: Name of the territory the account is aligned to.
- **Territory Integration ID**: Unique territory identification number of the territory that the account is aligned to.
- **Source**: *Dynamic* or *Explicit*.
- **Reason**: Lists rules' names involved in the account product territory restriction.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.

Account Product Territory Restrictions Explicit



Account Product Territory Restrictions Explicit

	Account Name	Account Integrati...	Account Type	Territory Name	Territory Integrati...	Effective Date	En
1	BERNARDINO GARCIA	0013h00000FmfTWAAZ	Business Contact	Delaware - Diabetes Sales	100690000013295	12/2/2020	

1 Records

View All

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Type of account, such as *Business Contact*.
- **Territory Name**: Name of the territory the account is aligned to.
- **Territory Integration Id**: Unique territory identification number of the territory that the account is aligned to.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.

- **Created By**: A combination of the creator's user name and the date/time the account was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account and the date/time it was updated.

Product Alignments Tab

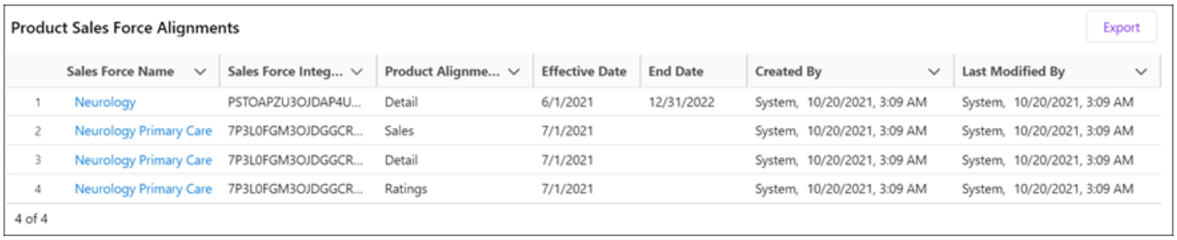
You can create a relationship between a Product and a Sales Force to determine the products presented to customers via the **Alignments** tab. For integration with OCE Sales, the sales force concept is elaborated to the territory level.

You can override the sales force level product alignment by creating Product Exclusions and Product Explicits at the territory level. For example, you may want to override the alignment if a representative assigned to a territory is not certified to promote a product that the rest of the sales force is.

Note: Product alignments are managed through scenarios. To add a product alignment, see Add a Product Alignment Transaction to a Scenario.

The **Alignments** tab displays the current view of the data based on the As Of Date.

Product Sales Force Alignments


Product Sales Force Alignments

Export

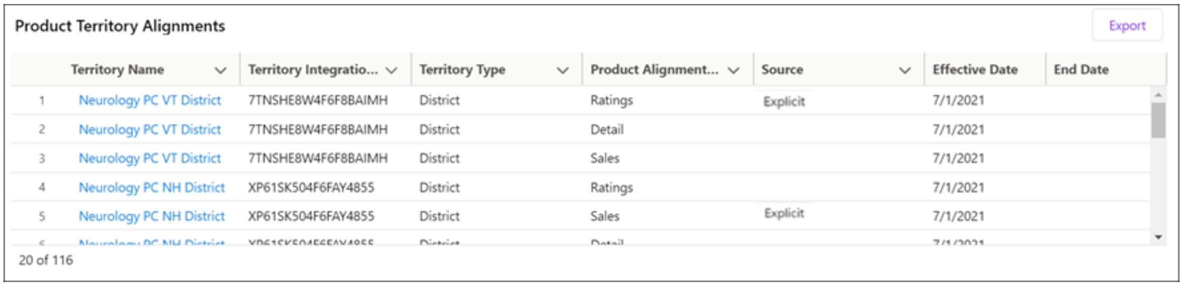
	Sales Force Name	Sales Force Integ...	Product Alignme...	Effective Date	End Date	Created By	Last Modified By
1	Neurology	PSTOAPZU3OJDAP4U...	Detail	6/1/2021	12/31/2022	System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM
2	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Sales	7/1/2021		System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM
3	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Detail	7/1/2021		System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM
4	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Ratings	7/1/2021		System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM

4 of 4

- **Sales Force Name**: Name of the sales force the product is aligned to.
- **Sales Force Integration ID**: System -generated sales force identification number.
- **Product Alignment Type**: The purpose for the product alignment. For example, Detail and Sales.
- **Effective Date**: Indicates the date when the product is active/valid.
- **End Date**: Indicates the date after which the product is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the product alignment was created.

- **Last Modified By**: A combination of the user name of the last person to edit the product alignment and the date/time it was updated.

Product Territory Alignments



Product Territory Alignments

Export

	Territory Name	Territory Integratio...	Territory Type	Product Alignment...	Source	Effective Date	End Date
1	Neurology PC VT District	7TNSHE8W4F6F8BAIMH	District	Ratings	Explicit	7/1/2021	
2	Neurology PC VT District	7TNSHE8W4F6F8BAIMH	District	Detail		7/1/2021	
3	Neurology PC VT District	7TNSHE8W4F6F8BAIMH	District	Sales		7/1/2021	
4	Neurology PC NH District	XP61SK504F6FAY4855	District	Ratings		7/1/2021	
5	Neurology PC NH District	XP61SK504F6FAY4855	District	Sales	Explicit	7/1/2021	

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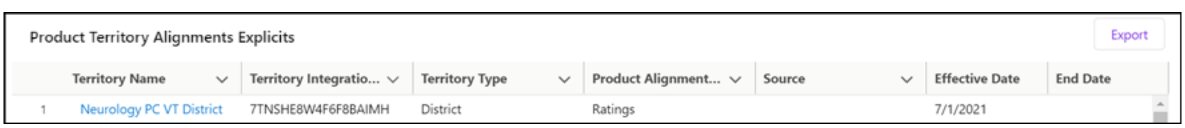
- **Territory Name**: Name of the territory the product is aligned to.
- **Territory Integration ID**: System-generated territory identification number.
- **Territory Type**: Type of territory, such as *Territory*, *District*, *Region*, *Area*, or *Business Unit*.
- **Product Alignment Type**: The purpose of the product alignment. For example, *Detail*, *Sales*, etc.
- **Source**: *Dynamic* (product aligned at sales force level and inherited down to territory level), *Explicit* (product explicitly aligned at territory level), or *Cascade* (parent product explicitly aligned to territory level and this product aligned due to cascade flag true for the product hierarchy).
- **Effective Date**: Indicates the date when the alignment is active/valid.
- **End Date**: Indicates the date when the alignment is no longer active/valid.

Product Territory Alignments Explicits



Product Territory Alignments Explicits

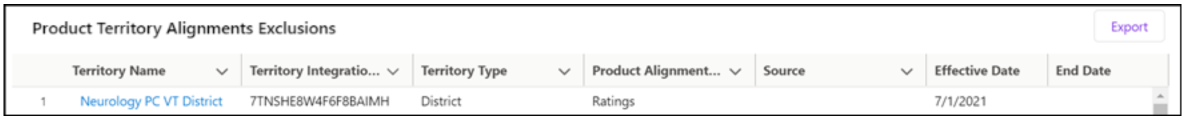
Export

	Territory Name	Territory Integratio...	Territory Type	Product Alignment...	Source	Effective Date	End Date
1	Neurology PC VT District	7TNSHE8W4F6F8BAIMH	District	Ratings		7/1/2021	

- **Territory Name**: Name of the territory the product is aligned to.
- **Territory Integration ID**: System -generated territory identification number.
- **Product Alignment Type**: The purpose for the product alignment. For example, *Detail*, *Sales*, etc.
- **Source**: *Dynamic*, *Explicit*, or *Cascade*.
- **Effective Date**: Indicates the date when the alignment is active/valid.

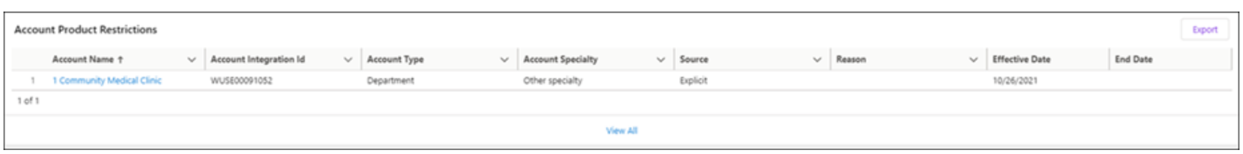
- **End Date**: Indicates the date after which the alignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the product alignment was created.
- **Last Modified By**: A combination of the user name of the last person to edit the product alignment and the date/time it was updated.

Product Territory Alignments Exclusions



- **Territory Name**: Name of the territory the product is aligned to.
- **Territory Integration ID**: System -generated territory identification number.
- **Product Alignment Type**: The purpose for the product alignment. For example, Detail, Sales, etc.
- **Source**: *Dynamic*, *Explicit*, or *Cascade*.
- **Effective Date**: Indicates the date when the alignment is active/valid.
- **End Date**: Indicates the date after which the alignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the product alignment was created.
- **Last Modified By**: A combination of the user name of the last person to edit the product alignment and the date/time it was updated.

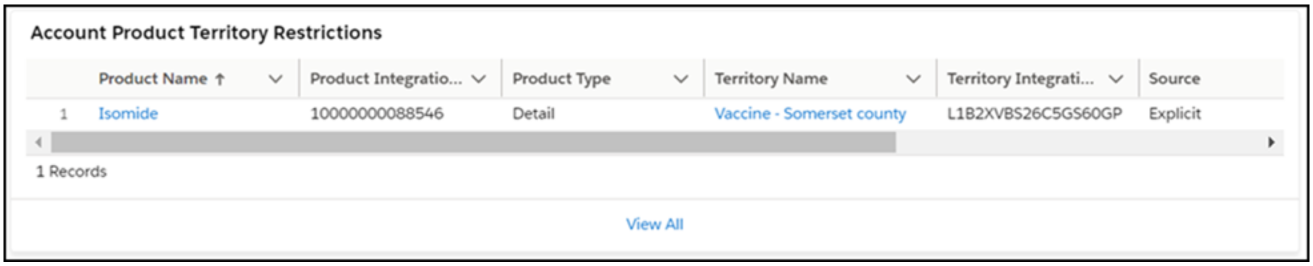
Account Product Restrictions



- **Account Name**: Name of the account.
- **Account Integration Id**: System-generated account identification number.
- **Account Type**: Type of account, such as *Medical Professional.*

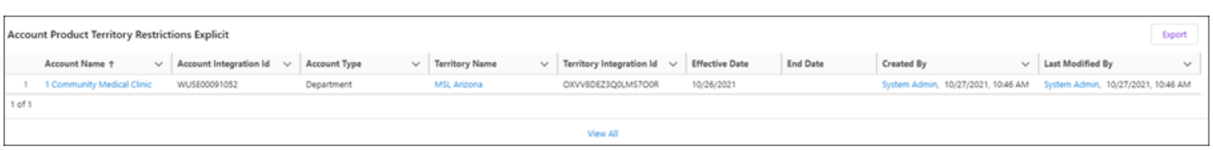
- **Account Specialty**: Area or expertise.
- **Source**: *Dynamic* , *Explicit*, or *Cascade*.
- **Reason**: Lists rules' names involved in the account product restriction.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.

Account Product Territory Restrictions



- **Account Name**: Name of the account.
- **Account Integration Id**: System-generated account identification number.
- **Account Type**: Type of account, such as *Business Contact.*
- **Territory Name**: Name of the territory.
- **Territory Integration Id**: System-generated territory identification number.
- **Source**: *Dynamic* , *Explicit*, or *Cascade*.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the restriction was created.
- **Last Modified By**: A combination of the user name of the last person to edit the restriction and the date/time it was updated.

Account Product Territory Restrictions Explicit



- **Account Name**: Name of the account.
- **Account Integration Id**: System-generated account identification number.
- **Account Type**: Type of account, such as *Business Contact.*
- **Territory Name**: Name of the territory.
- **Territory Integration Id**: System-generated territory identification number.
- **Source**: *Dynamic*, *Explicit*, or *Cascade*.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the restriction was created.
- **Last Modified By**: A combination of the user name of the last person to edit the restriction and the date/time it was updated.

Product Details History-Time Tab

The **Details History-Time** tab displays the same information as the **Details** tab, except it shows all past, current, and future views of product details. This tab also displays the audit history of key fields.

Field History

- **Date**: The date and time the field was modified.
- **Field**: The name of the field that was modified.
- **Full Name**: The user name of the person who modified the field.
- **Old Value**: The previous value of the field.
- **New Value**: The current value of the field.
- **Scenario Name**: The scenario associated with the field modification.

- **Scenario Integration Id**: The scenario integration identification number associated with the field modification.

Parent Products

Parent Products

New Export

	Product Name	Product Integration Id	Product Type	Cascade Product Alignment	Effective Date	End Date ↑
1	Neurology	10048000062054	Brand	✓	10/20/2021	

1 of 1

View All

For details on the fields in this section, see the **Parent Products** section in Product Details Tab.

Child Products

Child Products

New Export

	Product Name	Product Integration Id	Product Type	Cascade Product Alignment	Effective Date	End Date
1	Caronol-75mg	100328000004177	Sample		1/1/2020	
2	Caronol-50mg	10047000011391	Sample		1/1/2020	
3	Caronol-25mg	100691000027391	Sample		1/1/2020	
4	Caronol-100mg	100691000027403	Sample		1/1/2020	

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For details on the fields in this section, see the **Child Products** section in Product Details Tab.

Account Product Restrictions

Account Product Restrictions

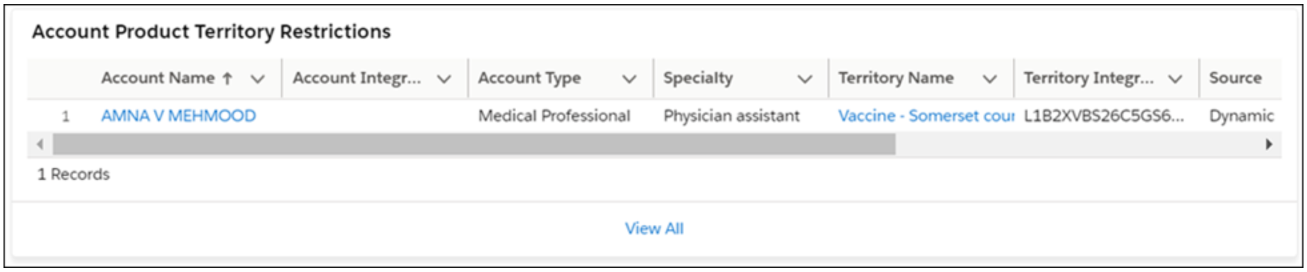
	Account Name ↑	Account Integration Id	Account Type	Specialty	Source	Reason
1	A.GalvinAyers	70000000000775	Medical Professional	Ophthalmology	Dynamic;Explicit	NPTestRule3

1 Records

View All

For details on the fields in this section, see the **Account Product Restrictions** section in Product Details Tab.

Account Product Territory Restrictions



Account Product Territory Restrictions

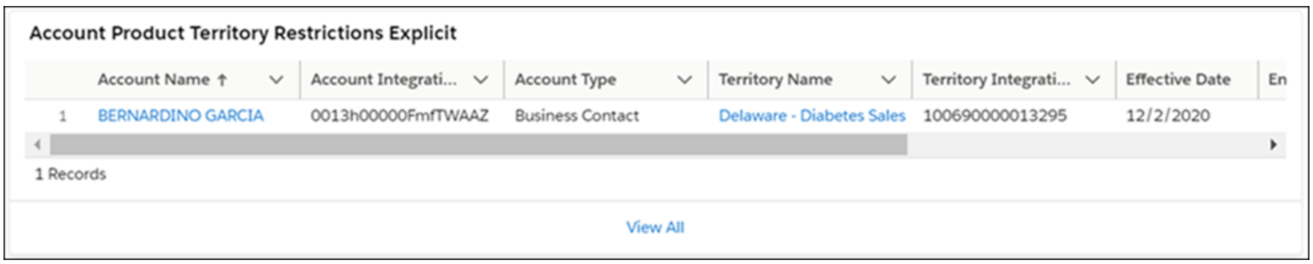
	Account Name	Account Integr...	Account Type	Specialty	Territory Name	Territory Integr...	Source
1	AMNA V MEHMOOD		Medical Professional	Physician assistant	Vaccine - Somerset cour	L1B2XVBS26C5GS6...	Dynamic

1 Records

View All

For details on the fields in this section, see the **Account Product Territory Restrictions** section in Product Details Tab.

Account Product Territory Restrictions Explicit



Account Product Territory Restrictions Explicit

	Account Name	Account Integrati...	Account Type	Territory Name	Territory Integrati...	Effective Date	En
1	BERNARDINO GARCIA	0013h00000FmfTWAAZ	Business Contact	Delaware - Diabetes Sales	100690000013295	12/2/2020	

1 Records

View All

For details on the fields in this section, see the **Account Product Territory Restrictions Explicit** section in Product Details Tab.

Product Alignments History-Time Tab

The **Alignment History-Time** tab displays the same information as the **Alignments** tab, except it shows past, current, and future views of product alignment details.

Product Sales Force Alignments

Product Sales Force Alignments

Export

	Sales Force Name	Sales Force Integ...	Product Alignme...	Effective Date	End Date	Created By	Last Modified By
1	Neurology	PSTOAPZU3OJDAP4U...	Detail	6/1/2021	12/31/2022	System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM
2	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Sales	7/1/2021		System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM
3	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Detail	7/1/2021		System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM
4	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Ratings	7/1/2021		System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM

4 of 4

For details on the fields in this section, see the **Product Alignments** section in Product Alignments Tab.

Product Alignments Explicit

Product Territory Alignments Explicits

Export

	Territory Name	Territory Integratio...	Territory Type	Product Alignment...	Source	Effective Date	End Date
1	Neurology PC VT District	7TNSHE8W4F6F8BAIMH	District	Ratings		7/1/2021	

For details on the fields in this section, see the **Product Alignments Explicit** section in Product Alignments Tab.

Product Alignments Exclusions

Product Territory Alignments Exclusions

Export

	Territory Name	Territory Integratio...	Territory Type	Product Alignment...	Source	Effective Date	End Date
1	Neurology PC VT District	7TNSHE8W4F6F8BAIMH	District	Ratings		7/1/2021	

For details on the fields in this section, see the **Product Alignments Exclusions** section in Product Alignments Tab.

Product Hierarchy Tab

The **Product Hierarchy** tab displays the parent-child hierarchy in a pictorial form. The data that displays is based on the **As Of Date** field.

The hierarchy diagram displays the selected product in the middle. If the product has parent products linked to it, they are displayed to the left. If the product has child products linked to it, they are displayed to the right. Each node contains the product name, integration ID, and product type.

Cascaded (parent and child products are automatically aligned) product relationships are represented with a green line and double arrow. Parent and child products that are not automatically aligned are represented with a gray line and single arrow.

If the products have parent and child products linked to them, the node changes from light blue to dark blue when expanded. The total number of linked parent/child products are displayed in the node (parent number is on the left and child number is on the right).

To view the details of a product, click the product name in the node.

To export hierarchy chart results to a PDF file, click **Export PDF**.

Product Creation

For each new Product, you can enter general information for the Product (such as the name that identifies the product), additional information related to the product (such as the type, packaging, and manufacturer), any external IDs associated with the product, and any product relationships.

See:

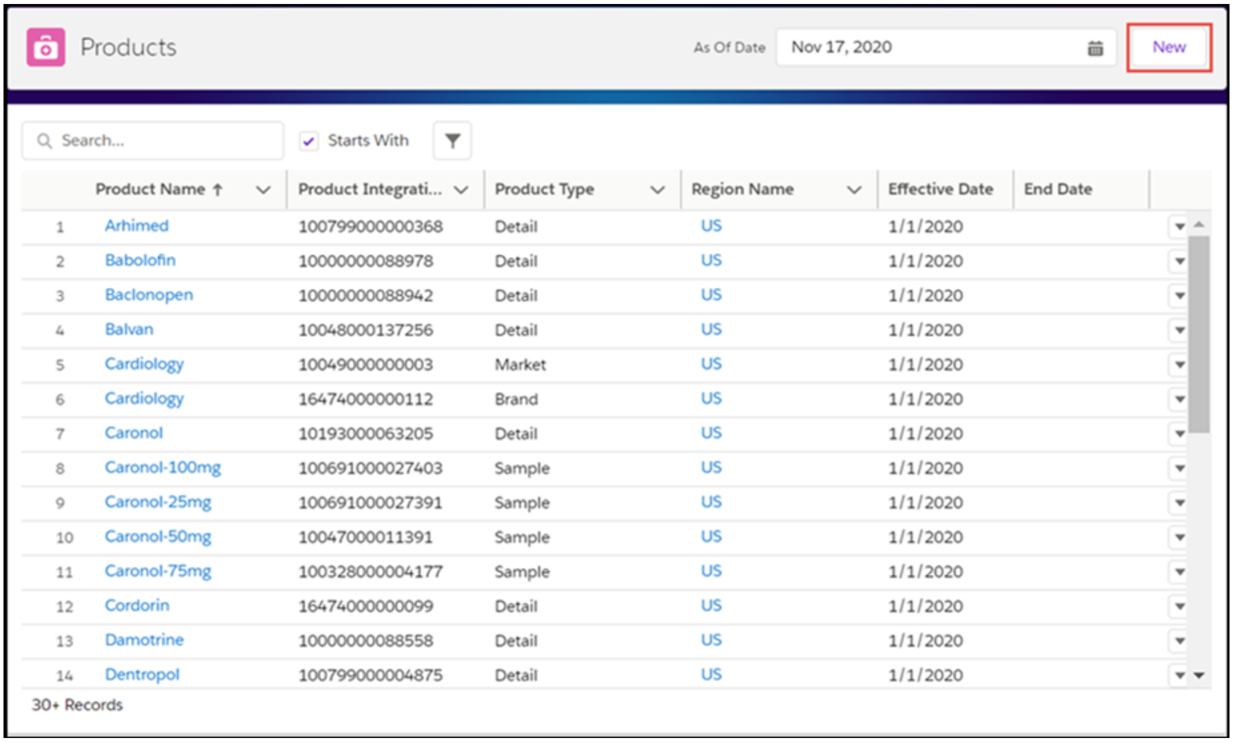
- Add a Product
- Modify a Product
- Delete a Product
- End Date a Product

Add a Product

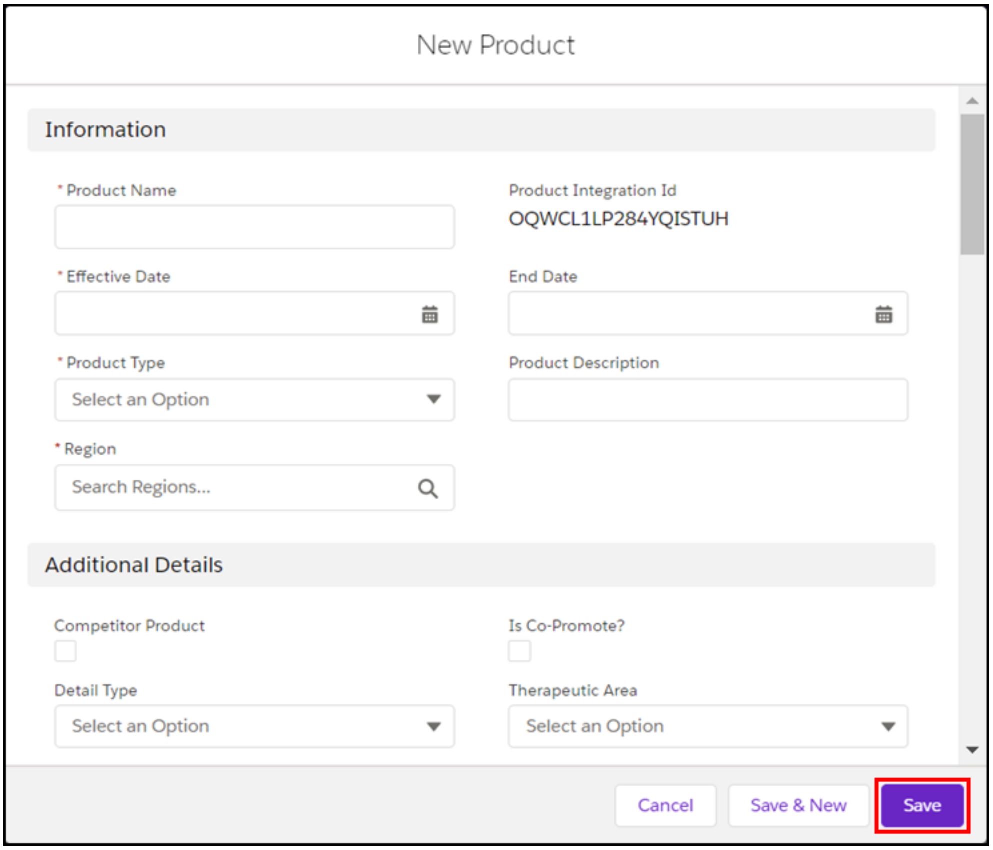
You can add products to the application.

To add a product

1. Click **Products** from the primary navigation bar.
2. From the Products page, click **New**.



3. Enter information for the new product and click **Save**.



> **Note:** Global HO users can add or edit a global product without requiring a response in the **Region** entry box. Global products display across regions. Global product functionality is parameter-driven. OCE Personal does not support global products.

For information about the fields, see View Product Information.

Modify a Product

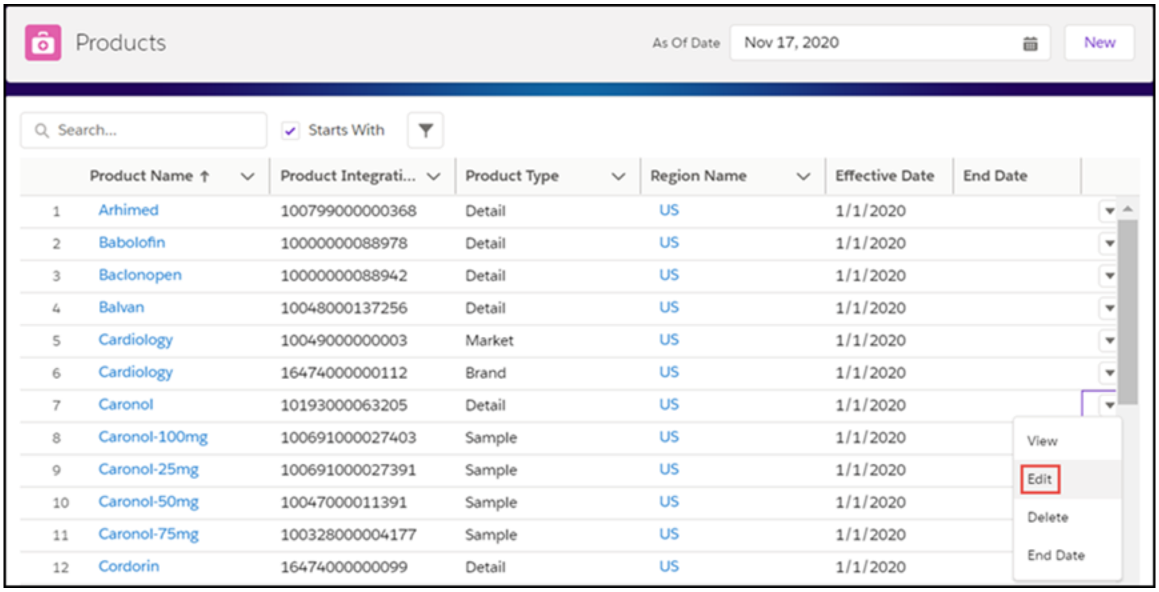
You can update the information of an existing product.

To update product details

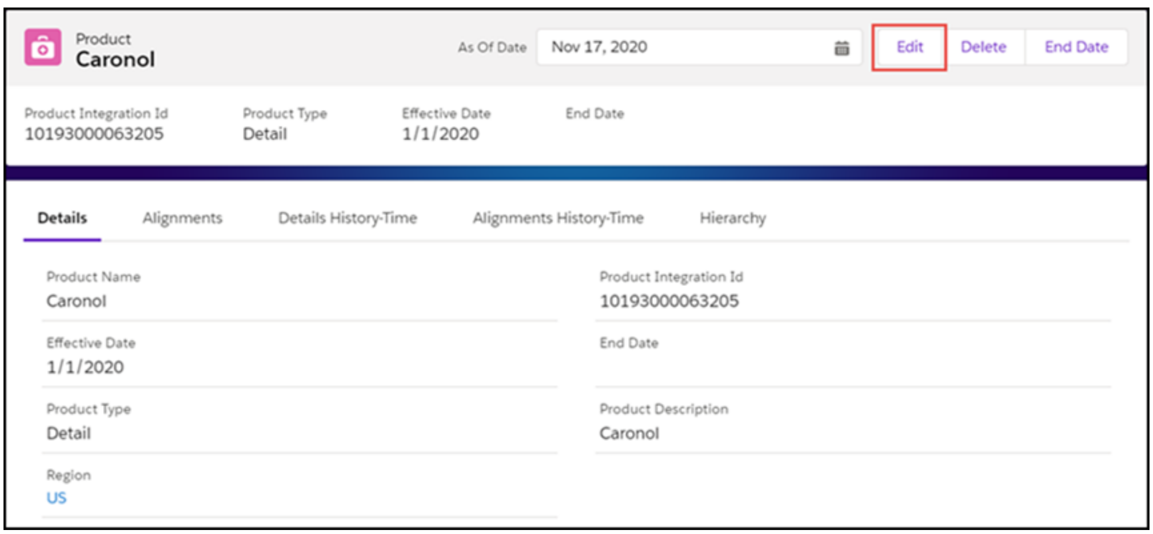
1. Click **Products** from the primary navigation bar.
2. After you find the product, do one of the following:

> **Note:** Use the **Search** and **Filters** functions to help you locate the product. See Search and Filter Functions.

- Click the drop-down for the product you want to edit and select **Edit**.

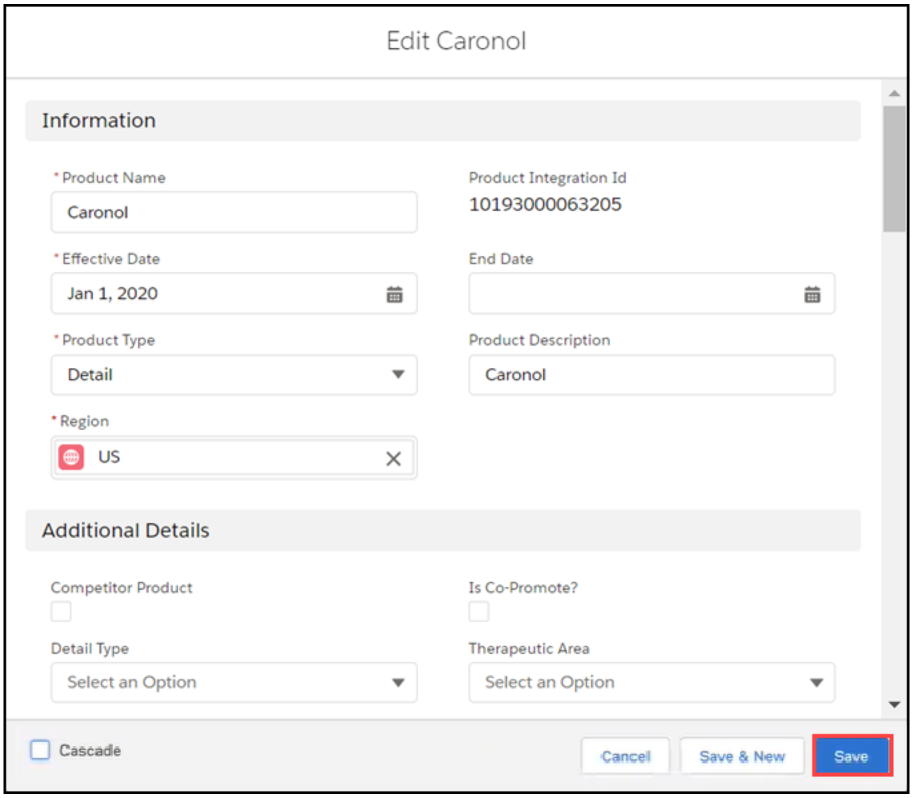


- Click the name of the product to go to the Product Details page, and then click **Edit**.



3. Modify the product information and click **Save**.

> **Note:** If you modify the **End Date**, you can cascade the action to all underlying child records by clicking **Cascade**.Otherwise the field is grayed out.



For information about the fields, see [View Product Information].

Delete a Product

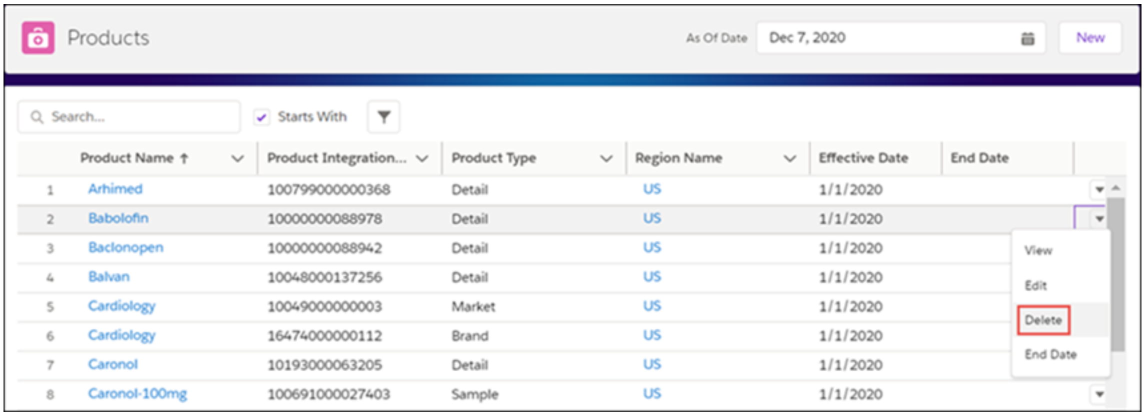
If you added a product by mistake, you can delete it from the system.

To delete a product

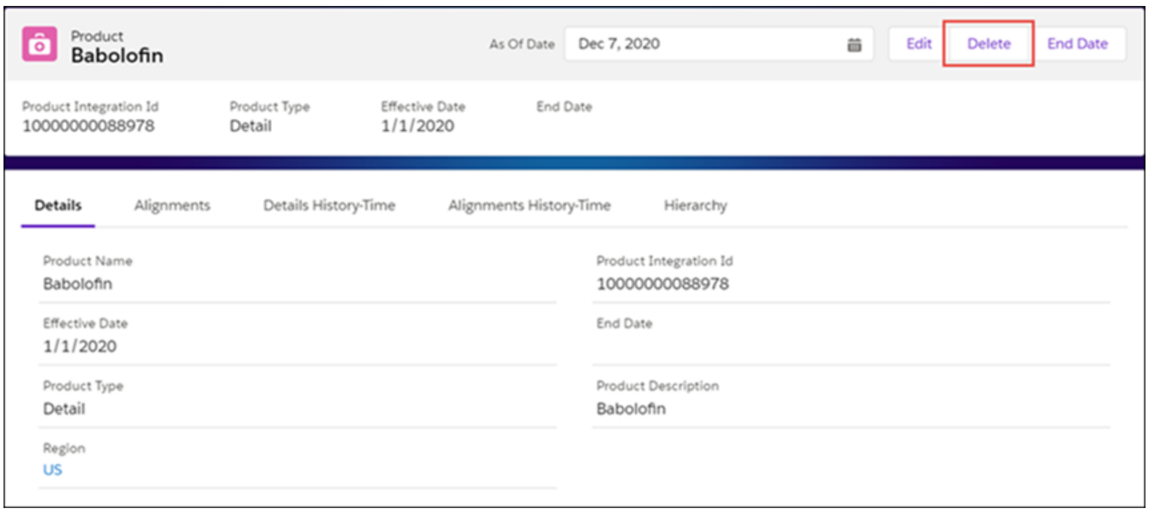
1. Click **Products** from the primary navigation bar.
2. Do one of the following:

> **Note:** Use the **Search** and **Filters** functions to help you locate the product. See [Search and Filter Functions].

- Select the drop-down for the product you would like to delete and click **Delete**.

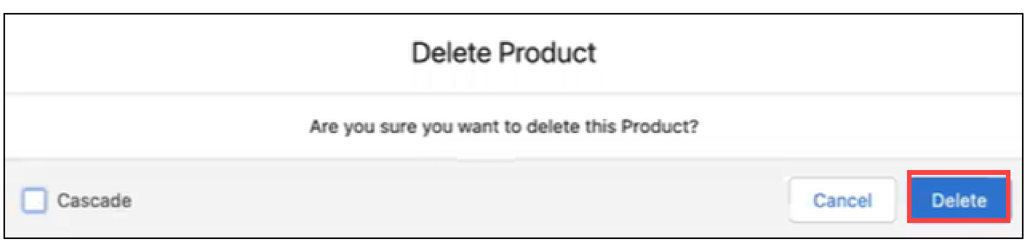


- Click the product name to go to the Product Details page, and then click **Delete**.



3. Click **Delete** to confirm.

> **Note:** To cascade the action to all underlying child records, click **Cascade**.



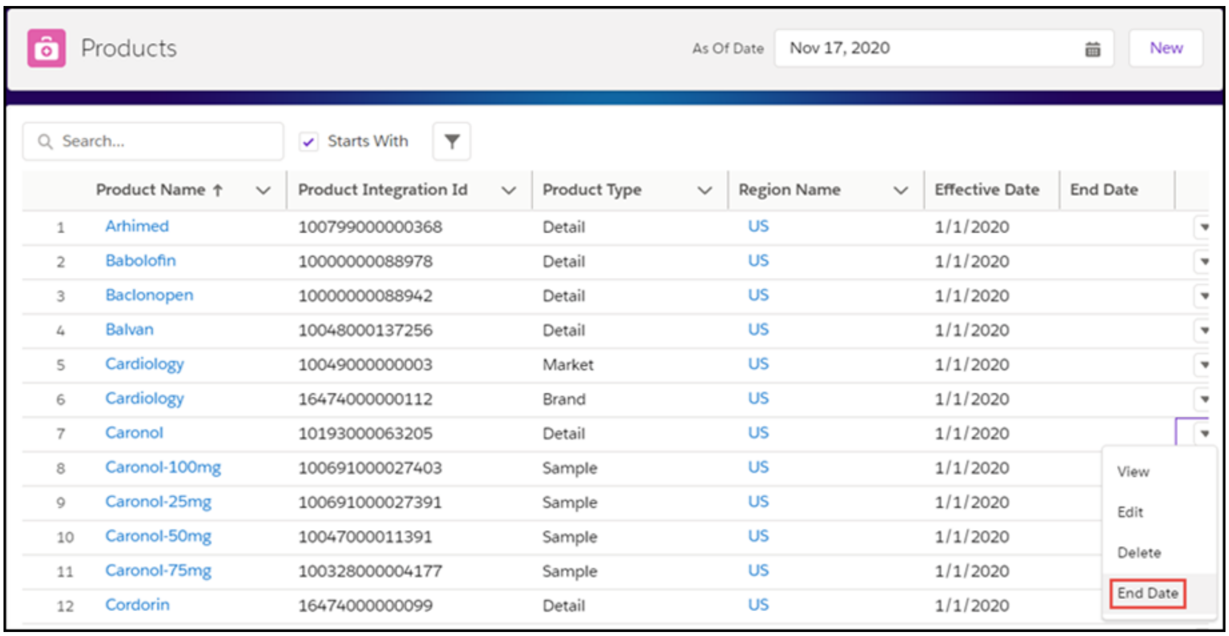
End Date a Product

You can end date (delete) a product, so it is no longer active/valid as of the end date. An end dated product is no longer available to add a new product alignment, etc.

To end date a product

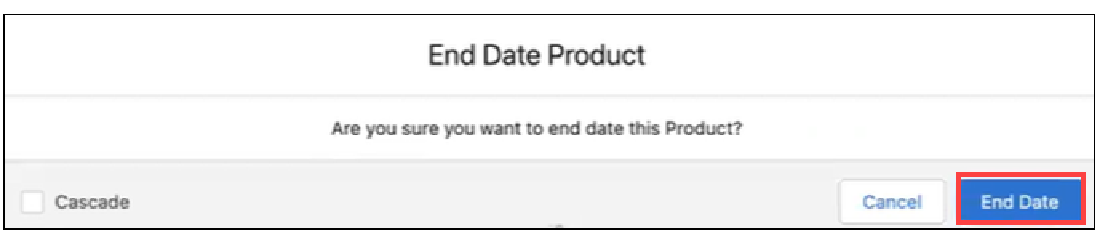
1. Click **Products** from the primary navigation bar.
2. Select the drop-down for the product you would like to remove and click **End Date**. You can also end date a product via the Edit Product screen by updating the **End Date**. See Modify a Product.

> **Note:** Use the **Search** and **Filters** functions to help you locate the product. See Search and Filter Functions.



3. Click **End Date** to confirm.

> **Note:** To cascade the action to all underlying child records, click **Cascade**.

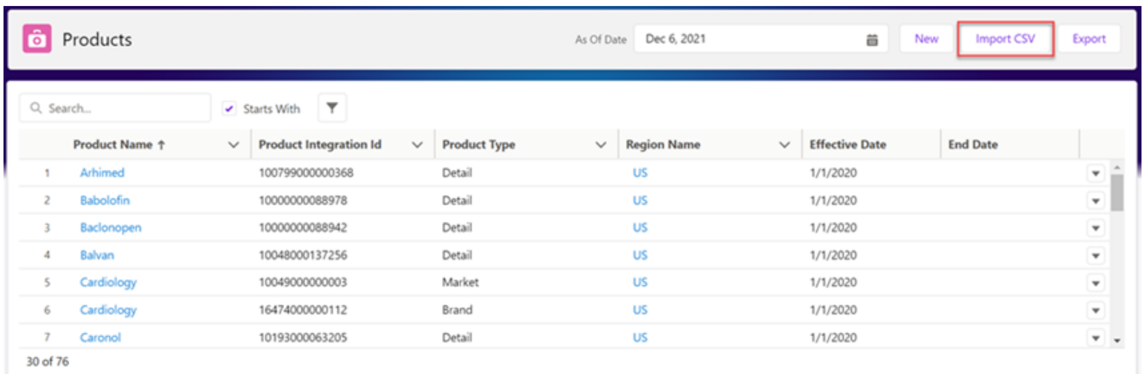


Import Product Data Using CSV Files

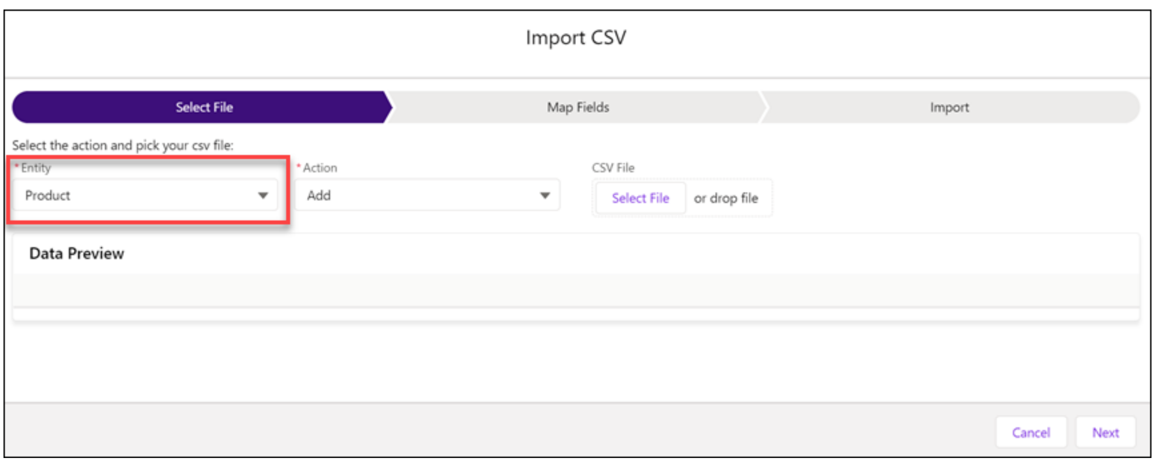
You can import data into the **Products** module by uploading it as a CSV file. The CSV file format is defined at run time and is auto-mapped, if possible. If auto-mapping is not possible because field names don't match between the CSV file and OCE Optimizer attribute names, then you can map it at run time.

To import data into Products

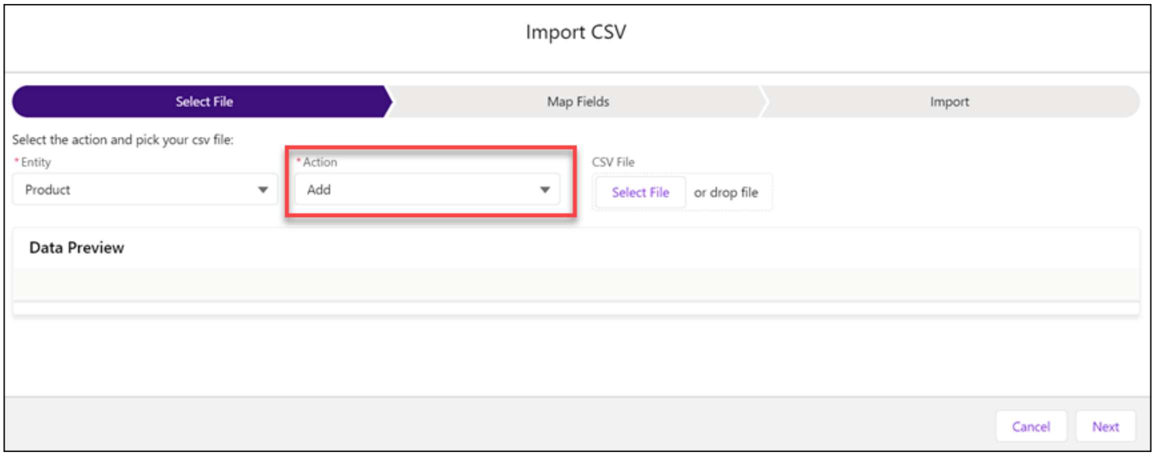
1. From the **Products** module, click **Import CSV**.



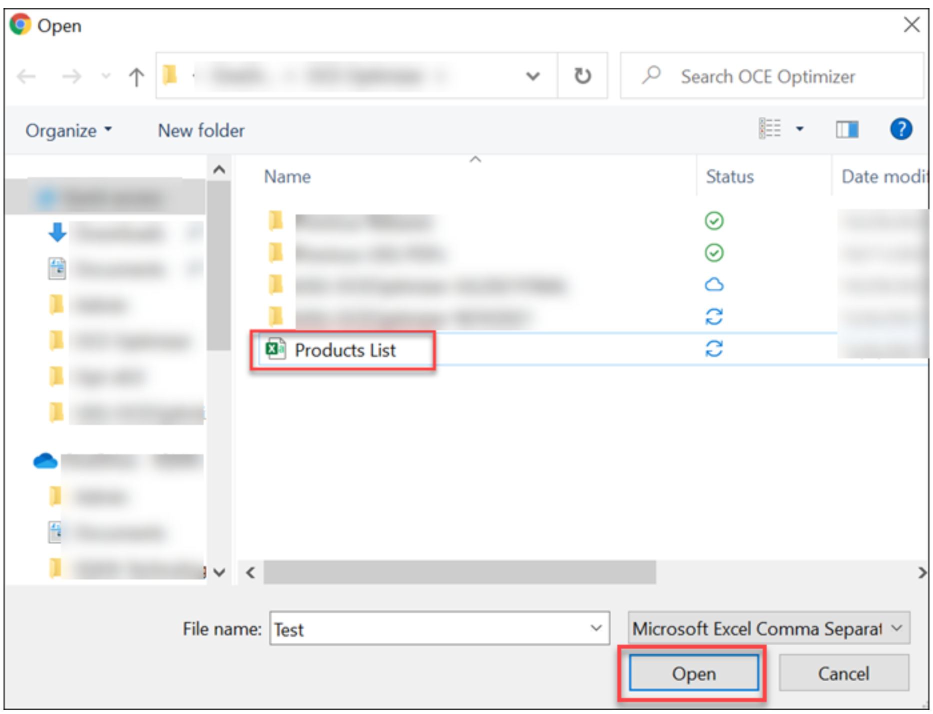
2. Select the entity, such as *Product*, *Product Hierarchy*, or *Product with Hierarchy*.



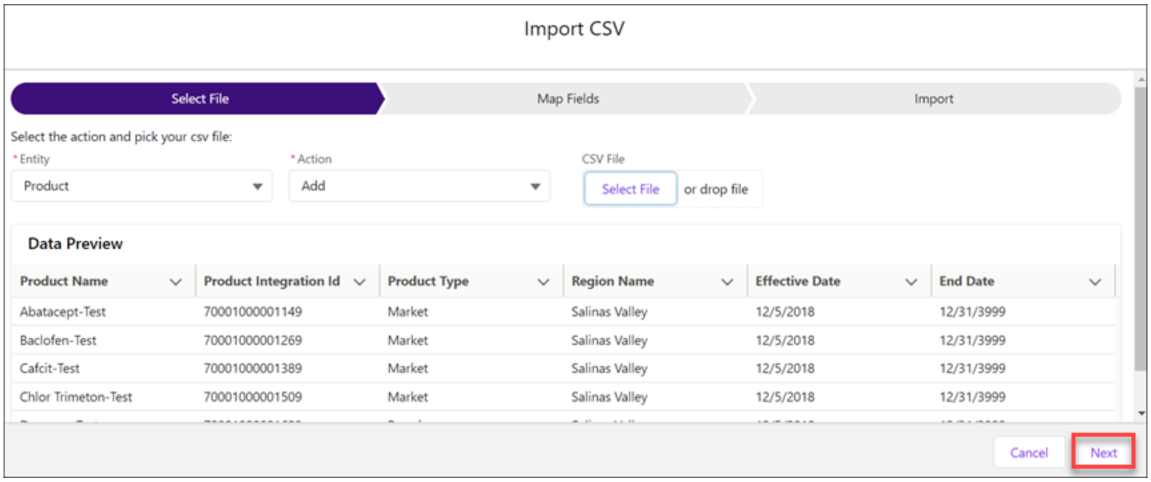
3. Select the type of import action, such as *Add*, *Edit*, *Update End Date*, or *Delete*.



4. Click **Select File**, browse to the file location, select the file, then click **Open**.



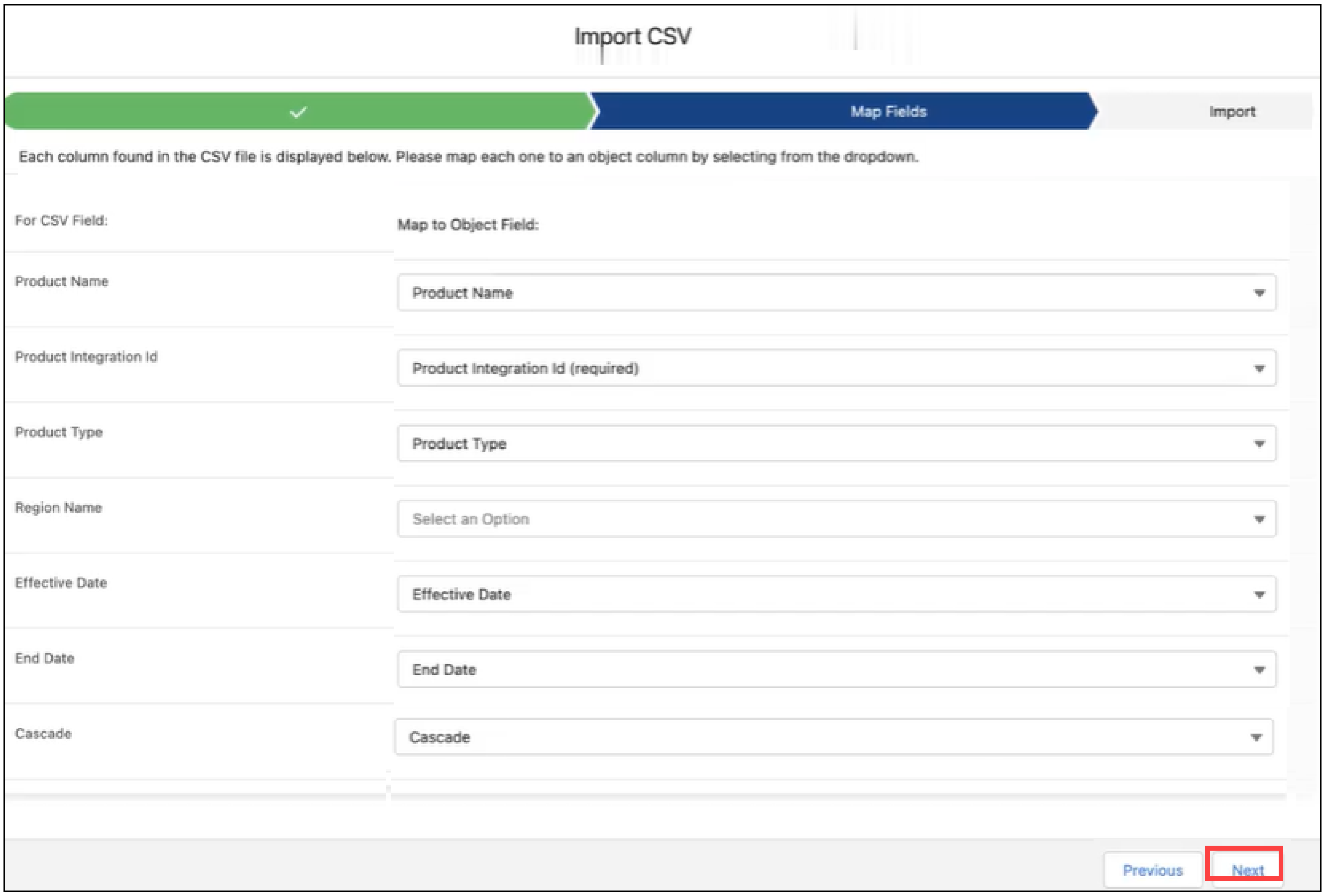
5. Verify the data in the **Data Preview** section, then click **Next**.



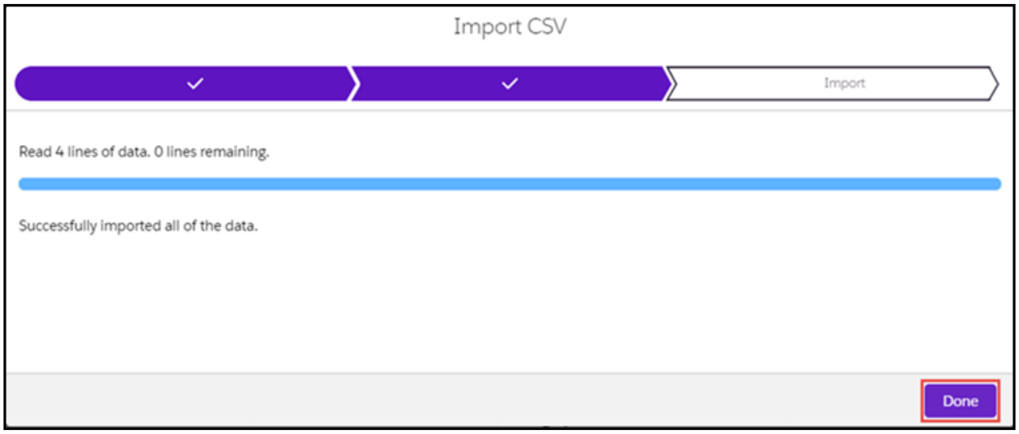
The system automatically maps each column in the csv file to an Object Field and indicates which fields are required.

6. Keep the automatic mapping or customize the mapping based on the csv file contents, then click **Next**.

> **Note:** If you want the system to update the current record in Cascade, add the virtual **Cascade** column with a value of *true*.



7. After the data is successfully imported, click **Done**.



The data is added to the **Products** module.

Product Parent Hierarchies

In the **Parent Products** section, you can define parent hierarchies for a product. The parent products are below the product in the hierarchy.

You can have many parent-child relationships in the hierarchy. There are no restrictions on having multiple parents for the same child product and multiple children for the same parent product for the same date range.

See:

- Add a Parent Hierarchy to a Product
- Modify a Product
- Delete a Product
- End Date a Product

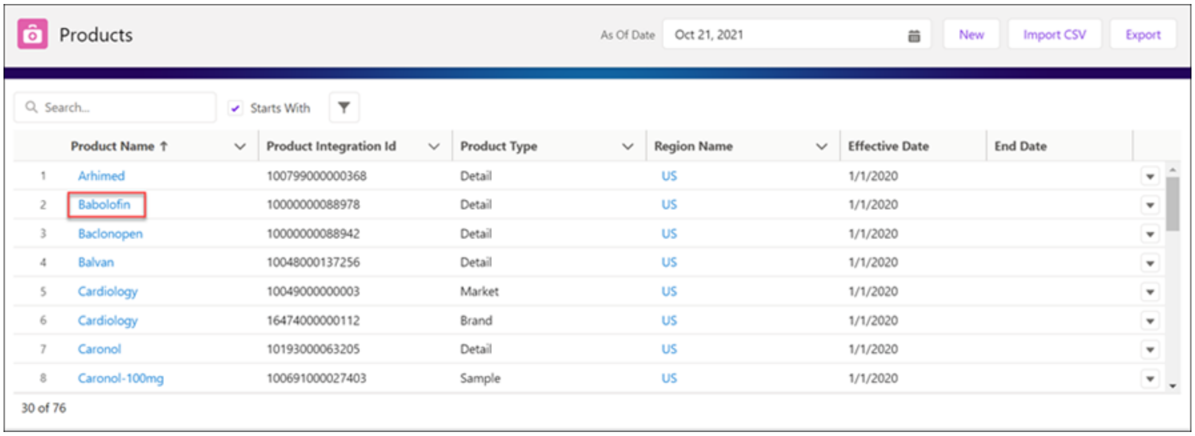
Add a Parent Hierarchy to a Product

You can add parent hierarchies to a product.

To add a parent hierarchy to a product

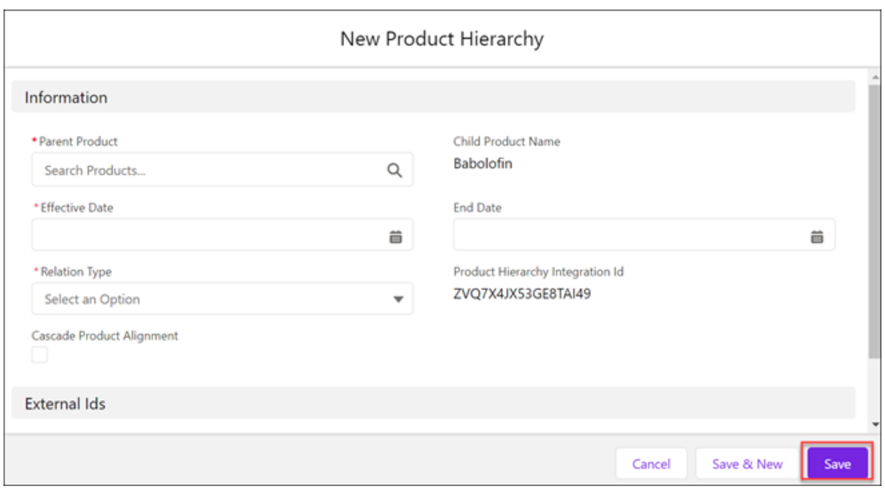
1. Click **Products** from the primary navigation bar.
2. Select the product you want to add a parent hierarchy to.

Note: Use the **Search** and **Filters** functions to help you locate the product. See Search and Filter Functions.



3. Scroll to the **Parent Products** section and click **New**.

4. Enter parent hierarchy information and click **Save**.



- **Parent Product**: The name of the parent product.
- **Child Product Name**: The name of the child product associated with the parent product.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.

- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Relation Type**: The hierarchy relation type, such as *Product*, *Indication*, *Therapeutic Area*, *Brand*.
- **Cascade Product Alignment**: Select to automatically align a parent product and child products.

  > **Note:** If selected, *Cascade* will appear in the Source column on product alignment grids throughout the application.

- **Product Hierarchy Integration Id**: System -generated product identification number.

For information on Parent Hierarchy fields and External Ids, see Product Details Tab.

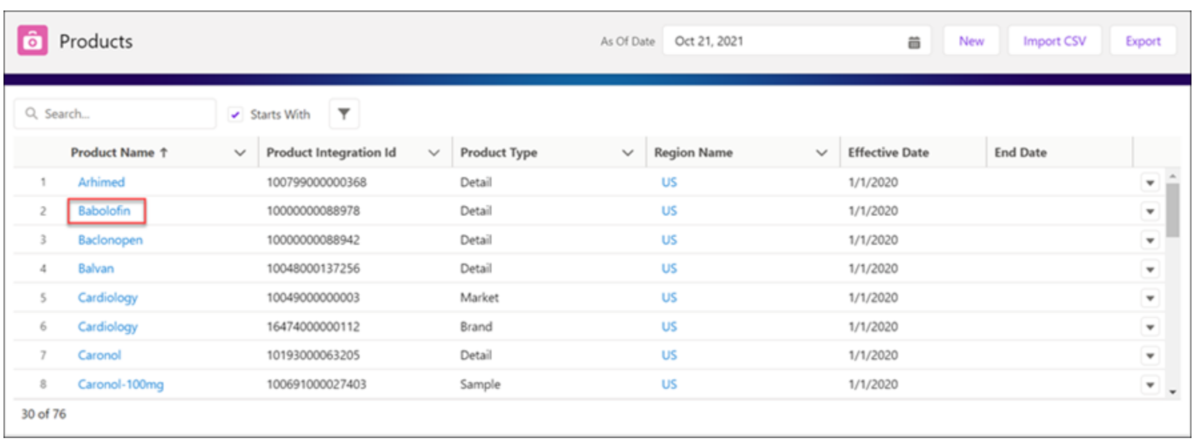
Modify a Parent Hierarchy Linked to a Product

You can make updates to parent hierarchies linked to a product.

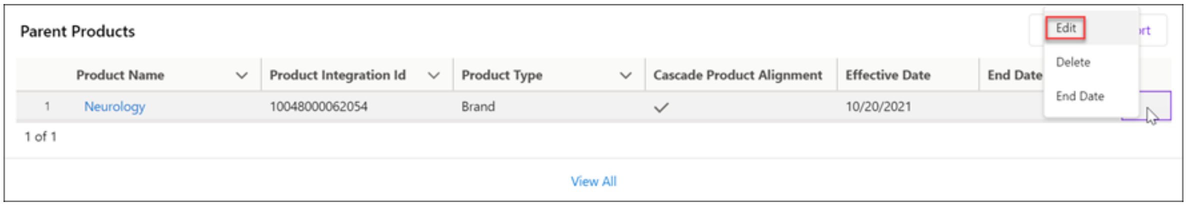
To edit a parent hierarchy linked to a product

1. Click **Products** from the primary navigation bar.
2. Select the product that has the parent hierarchy you want to make changes to.

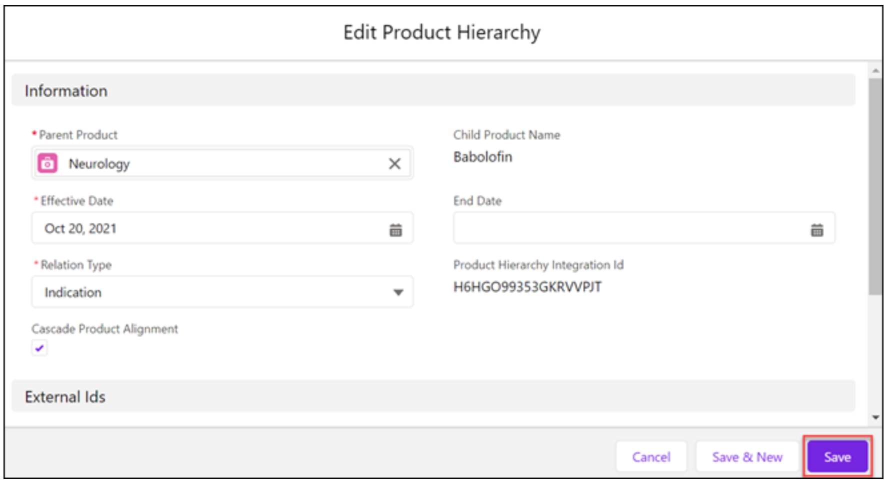
   > **Note:** Use the **Search** and **Filters** functions to help you locate the product. See Search and Filter Functions.



3. From the **Details** tab, scroll to the **Parent Products** section, click the drop-down for the hierarchy you want to edit, then select **Edit**.



4. Modify the parent hierarchy data and click **Save**.



For information about the fields, see View Product Information.

Delete a Parent Hierarchy Linked to a Product

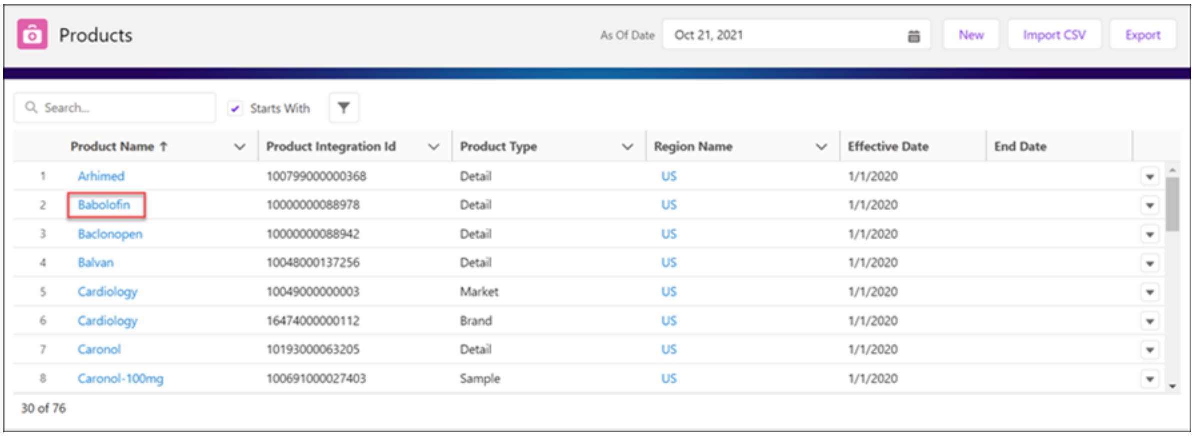
You can delete parent hierarchies linked to a product.

To delete a parent hierarchy linked to a product

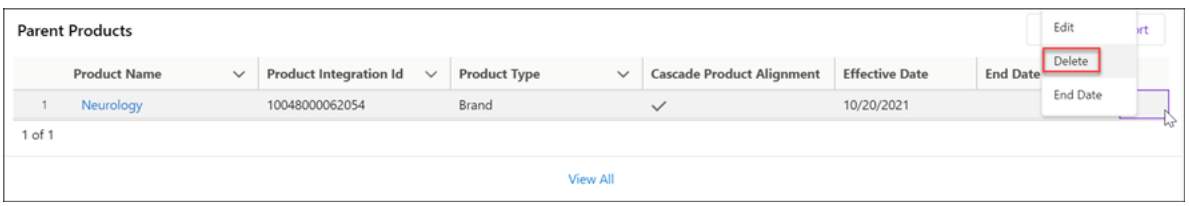
1. Click **Products** from the primary navigation bar.

2. Select the product that has the parent hierarchy you want to delete.

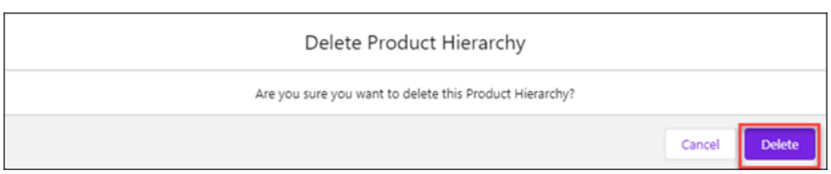
> **Note:** Use the **Search** and **Filters** functions to help you locate the product. See [Search and Filter Functions](#).



3. From the **Details** tab, scroll to the **Parent Products** section, click the drop-down for the hierarchy you want to delete, then select **Delete**.



4. Click **Delete** to confirm.



For information about the fields, see [View Product Information](#).

End Date a Parent Hierarchy Linked to a Product

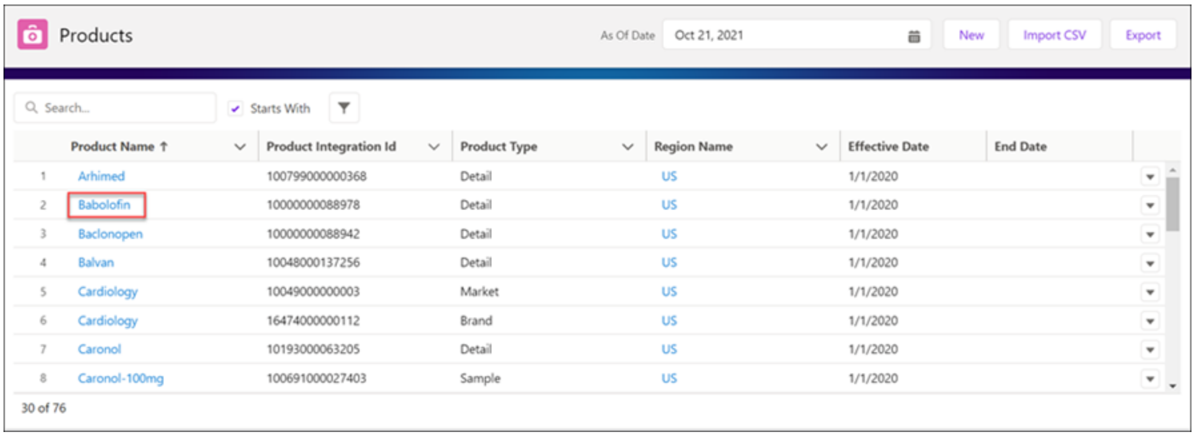
You can end date parent hierarchies linked to a product.

To end date a parent hierarchy linked to a product

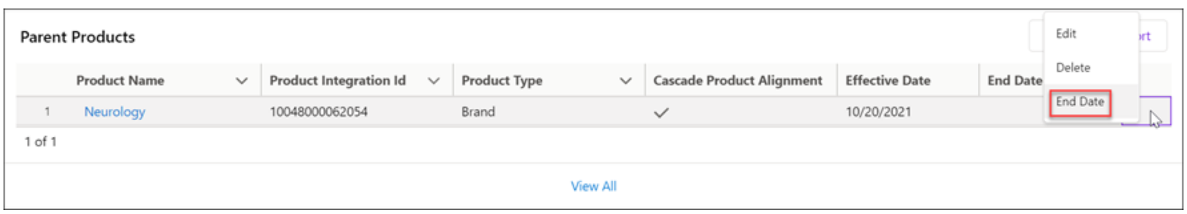
1. Click **Products** from the primary navigation bar.

2. Select the product that has the parent hierarchy you want to end date.

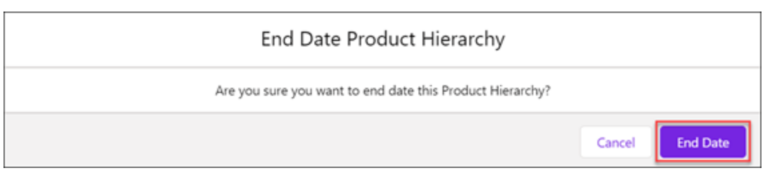
> **Note:** Use the **Search** and **Filters** functions to help you locate the product. See Search and Filter Functions.



3. From the **Details** tab, scroll to the **Parent Products** section, click the drop-down for the hierarchy you want to end date, then select **End Date**.



4. Click **End Date** to end date the product hierarchy.



For information about the fields, see View Product Information.

Product Child Hierarchies

In the **Child Products** section, you can define child hierarchies for a product. The child products are below the product in the hierarchy.

You can have many parent-child relationships in the hierarchy. There are no restrictions on having multiple parents for the same child product and multiple children for the same parent product for the same date range.

See:

- [Add a Child Hierarchy to a Product]
- [Modify a Child Hierarchy Linked to a Product]
- [Delete a Child Hierarchy Linked to a Product]

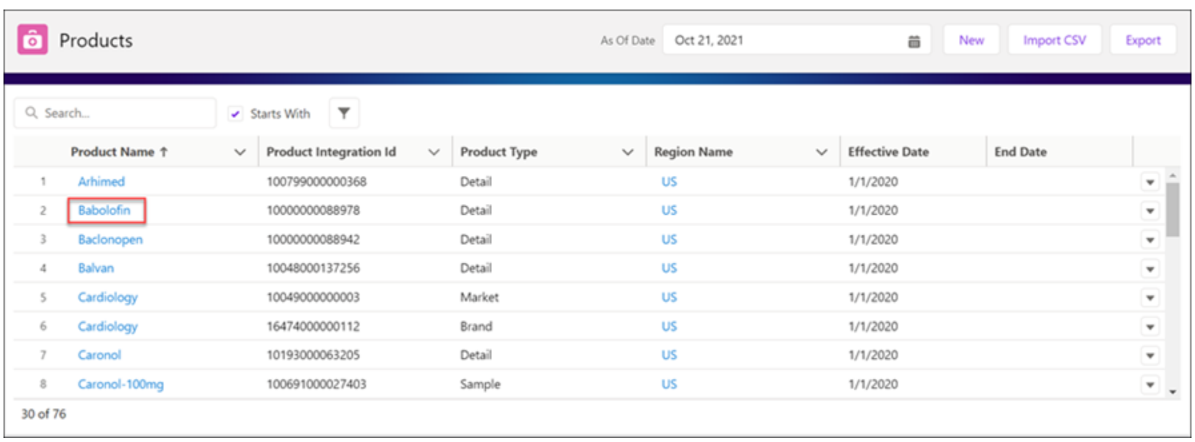
Add a Child Hierarchy to a Product

You can add child hierarchies to a product.

To add a child hierarchy to a product

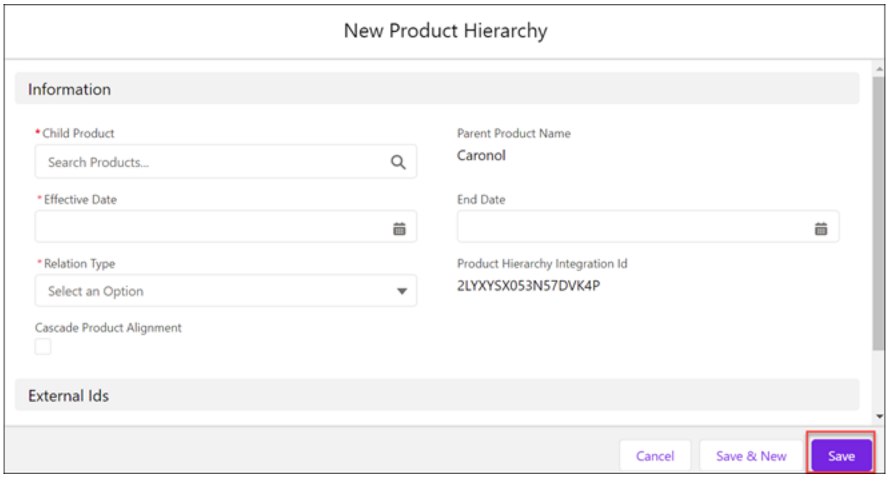
1. Click **Products** from the primary navigation bar.
2. Select the product you want to add a child hierarchy to.

> **Note:** Use the **Search** and **Filters** functions to help you locate the product. See Search and Filter Functions.



3. Scroll to the **Child Products** section and click **New**.

4. Enter child hierarchy information and click **Save**.



- **Child Product**: The name of the child product.
- **Parent Product Name**: The name of the parent product associated with the child product.
- **Effective Date**: The date when the parent-child hierarchy is active/valid.
- **End Date**: The date after which the parent-child hierarchy is no longer active/valid.
- **Relation Type**: The hierarchy relation type, such as *Product*, *Indication*, *Therapeutic Area*, *Brand*.
- **Cascade Product Alignment**: Select to automatically align a parent product and child products.

  Note: If selected, *Cascade* will appear in the **Source** column on product alignment grids throughout the application.

- **Product Hierarchy Integration Id**: System-generated product identification number.

For information on Child Hierarchy fields and External Ids, see Product Details Tab.

Modify a Child Hierarchy Linked to a Product

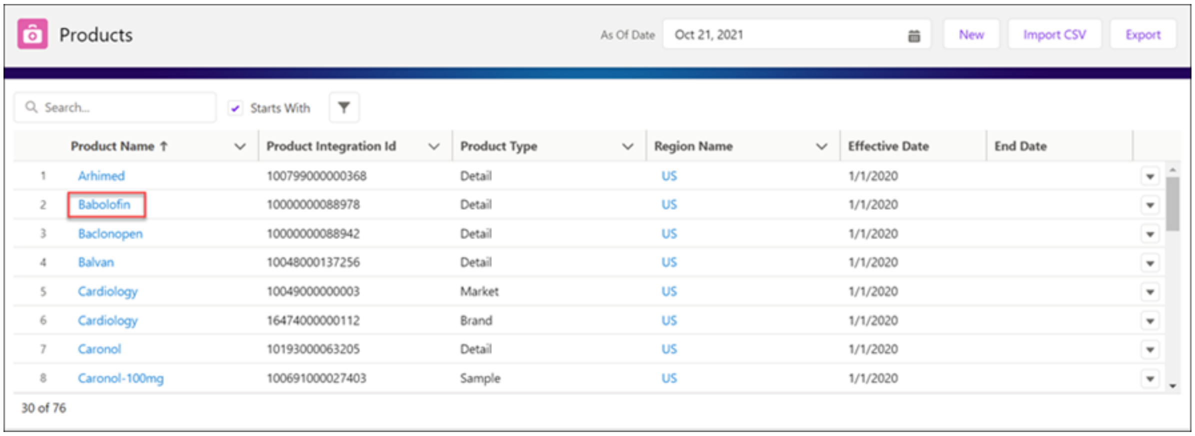
You can make updates to child hierarchies linked to a product.

To edit a child hierarchy linked to a product

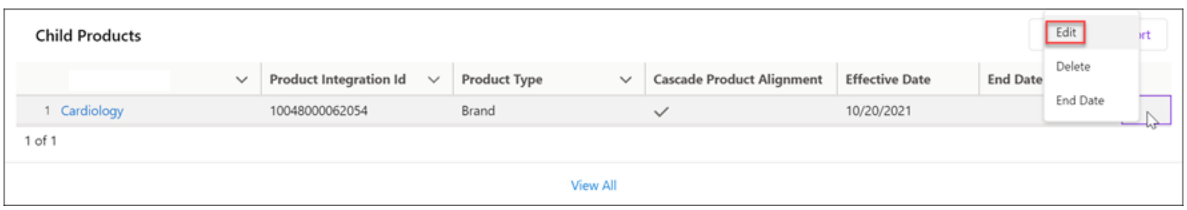
1. Click **Products** from the primary navigation bar.

2. Select the product that has the child hierarchy you want to make changes to.

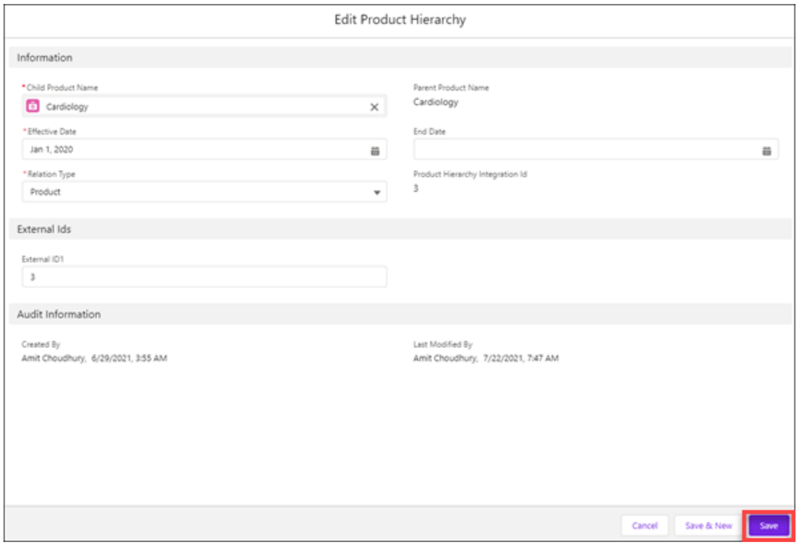
> **Note:** Use the **Search** and **Filters** functions to help you locate the product. See [Search and Filter Functions](#).



3. From the **Details** tab, scroll to the **Child Products** section, click the drop-down for the hierarchy you want to edit, then select **Edit**.



4. Modify the child hierarchy data and click **Save**.



For information about the fields, see [View Product Information](#).

Delete a Child Hierarchy Linked to a Product

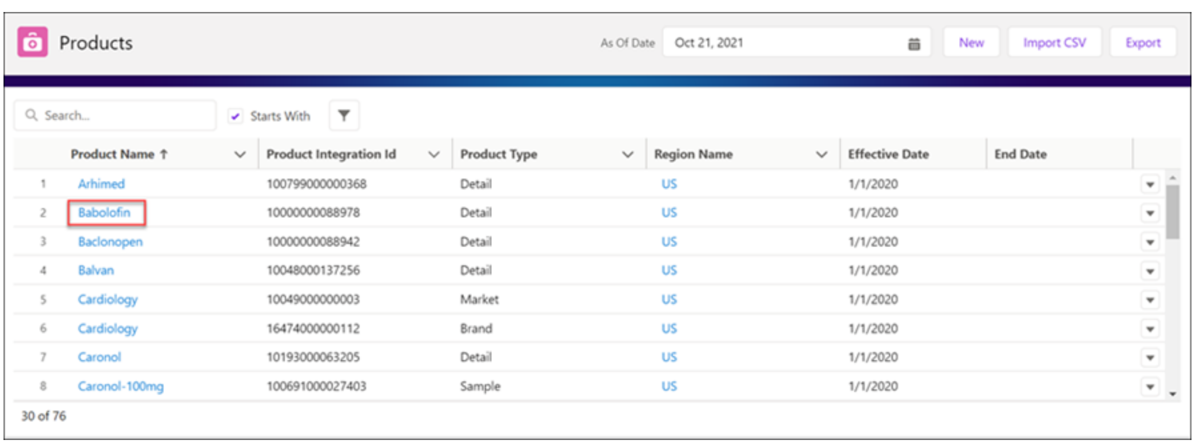
You can delete child hierarchies linked to a product.

To delete a child hierarchy linked to a product

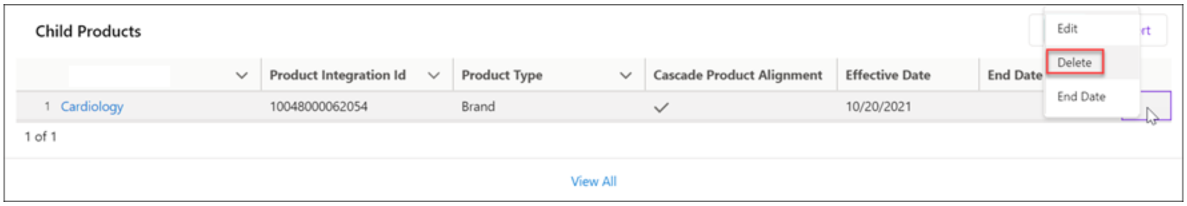
1. Click **Products** from the primary navigation bar.

2. Select the product that has the child hierarchy you want to delete.

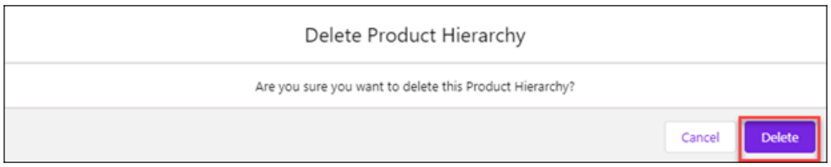
> **Note:** Use the **Search** and **Filters** functions to help you locate the product. See [Search and Filter Functions](#).



3. From the **Details** tab, scroll to the **Child Products** section, click the drop-down for the hierarchy you want to delete, then select **Delete**.



4. Click **Delete** to confirm.



For information about the fields, see View Product Information.

End Date a Child Hierarchy Linked to a Product

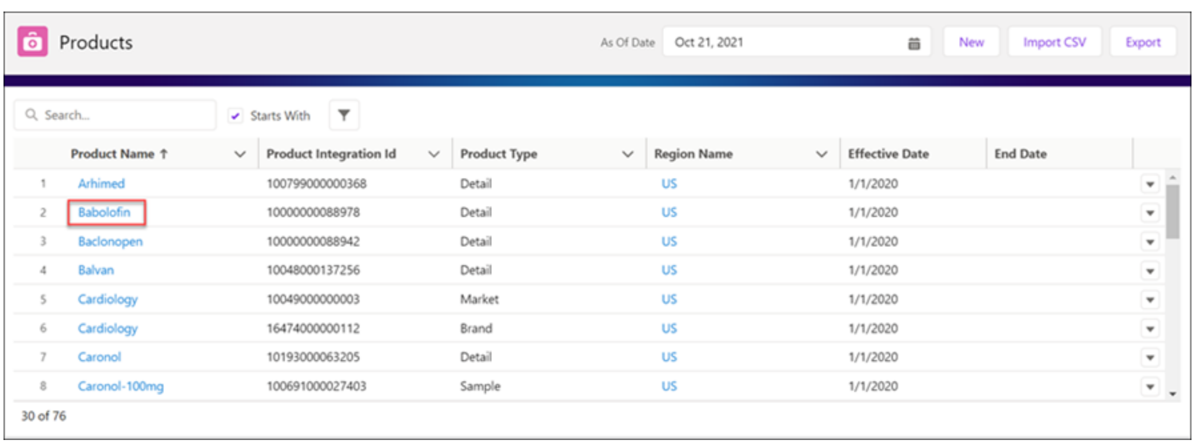
You can end date child hierarchies linked to a product.

To end date a child hierarchy linked to a product

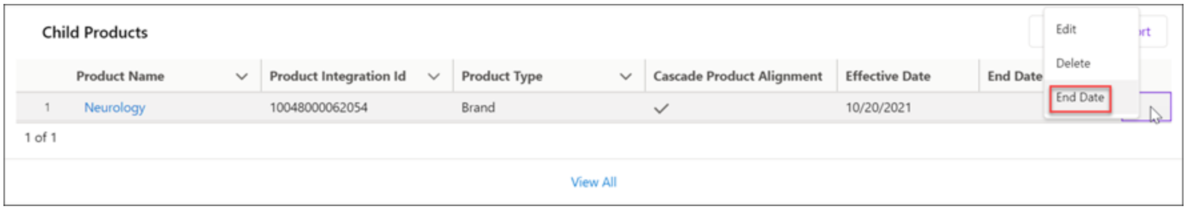
1. Click **Products** from the primary navigation bar.

2. Select the product that has the child hierarchy you want to end date.

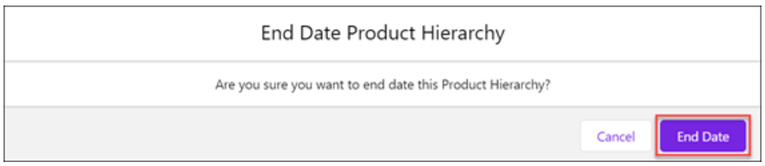
> **Note:** Use the **Search**  and **Filters**  functions to help you locate the product. See Search and Filter Functions.



3. From the **Details** tab, scroll to the **Child Products** section, click the drop-down for the hierarchy you want to end date, then select **End Date**.



4. Click **End Date** to end date the product hierarchy.



For information about the fields, see View Product Information.

View Accounts

You can view information on the professionals and organizations that are loaded into the app from MDM/OneKey or other sources. Management of the accounts, including addresses and affiliations, occurs in the source systems.

Important: If you receive a message that **Governor Limits** have been reached, contact the Product owner immediately.

Note: For information on viewing accounts for DMs or Reps, see View Account Information (Reps and District Managers).

View Account Information (Home Office)

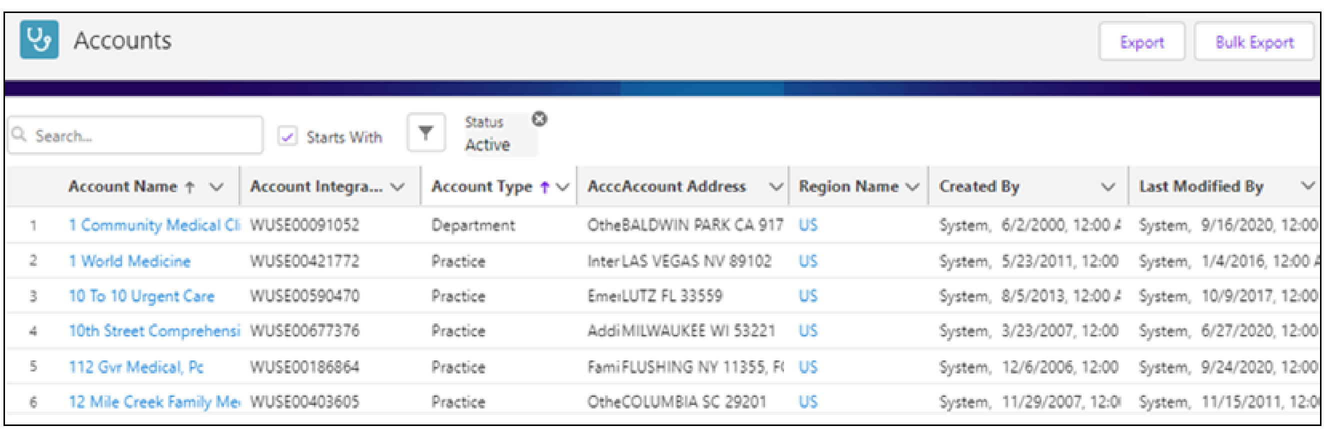
The **Accounts** module displays general information about the accounts, external IDs, account addresses, affiliations, and account territory alignments.

To view account information

1. Click **Accounts** from the primary navigation bar.

2. From the Accounts screen, select the account you want to view.

   Note: Use the **Search** and **Filters** functions to help you locate the account. See Search and Filter Functions for more information, including how to filter on active (default) and inactive accounts.



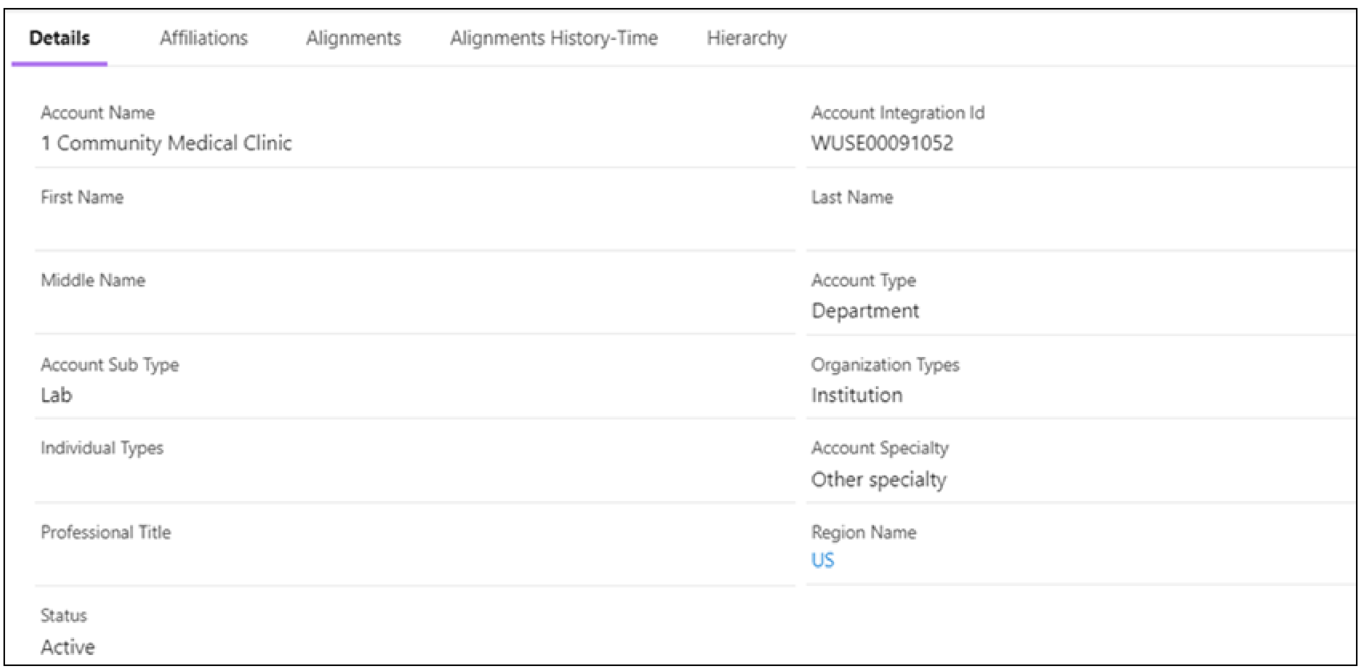
3. View the account information.

The Account Name, As Of Date, and the Account highlight section are displayed on the top of the Account entity page for all the Account tabs.

As Of Date: The data displayed for the account territory alignment is based on the date selected in this field. Display of other account data is not dependent on the As Of Date.

Highlight Section

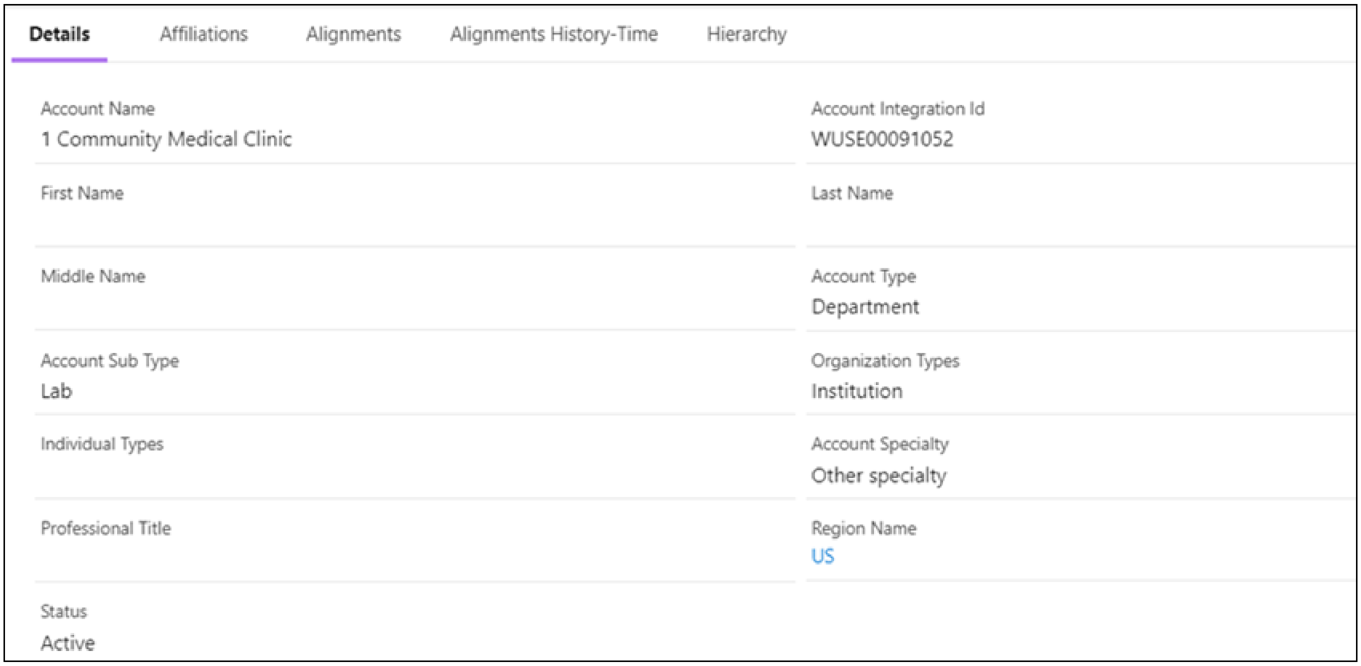
- **Account**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Account's area of expertise.



Accounts Details Tab

The **Details** tab contains general information about the accounts, external IDs, and account addresses.

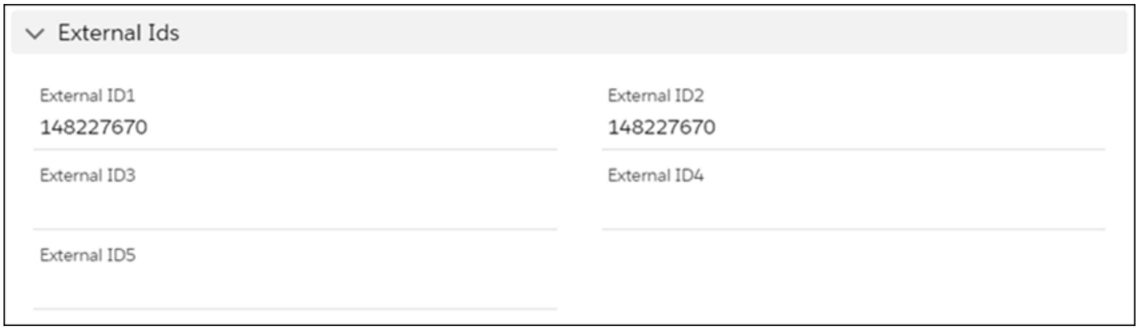
General Information



- **Account Name**: Name of the health care professional or health care organization.
- **Account Integration ID**: Unique account identification number.
- **First Name**: First name of the health care professional.
- **Middle Name**: Middle name or initial of the health care professional.
- **Last Name**: Last Name of the health care professional.
- **Account Type**: Health care professional or health care organization.
- **Account Sub Type**: Account's area of expertise.
- **Organization Types**: Type of health care organization.
- **Individual Types**: Type of health care professionals.
- **Account Specialty**: Area or expertise.
- **Professional Title**: health care professional's title.

- **Region Name**: Name of the region associated with the account.
- **Status**: *Active* or *Inactive*.

External IDs



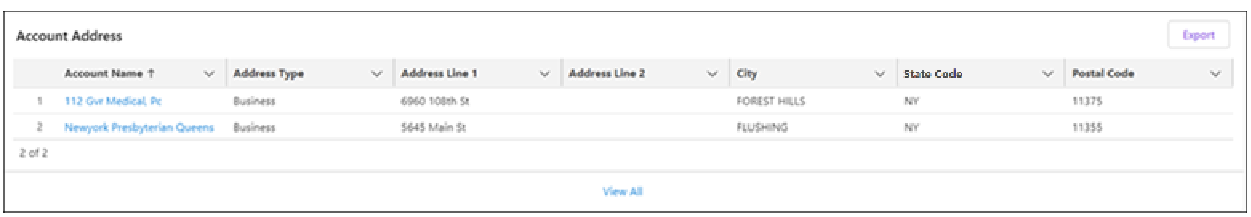
- **External ID1—ID5**: Up to 5 additional identification numbers for cross referencing.

Audit Information

Created By: A combination of the creator's user name and the date/time the account was created. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.

Last Modified By: A combination of the user name of the last person to edit the account and the date/time it was updated. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.

Account Address



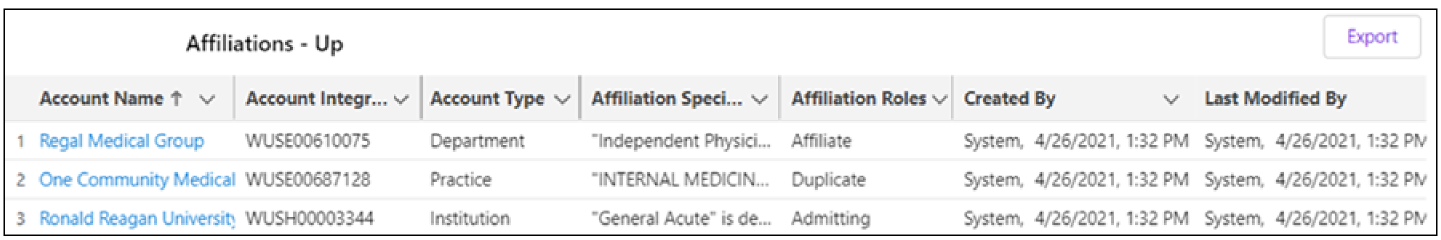
- **Account Name**: Organization or person associated with the corresponding address.
- **Address Type**: Description that classifies the address type, such as Home/Office, Mailing, Shipping, or Storage.
- **Address Line 1**: The street address of the account.
- **Address Line 2**: Additional address information, if applicable.
- **City**: The city where the account is.

- **State Code**: The state code that corresponds with the state where the account is.
- **Postal Code**: The postal code of the city where the account is.
- **Created By**: A combination of the creator's user name and the date/time the affiliations were created. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.
- **Last Modified By**: A combination of the user name of the last person to edit the affiliations and the date/time they were updated. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.

Accounts Affiliations Tab

The **Affiliations** tab displays all active affiliations for the account in which the account is considered the child (Affiliations-Up) of the relationship and all active affiliations for the account in which the account is considered the parent (Affiliations-Down) of the relationship.

Affiliations-Up

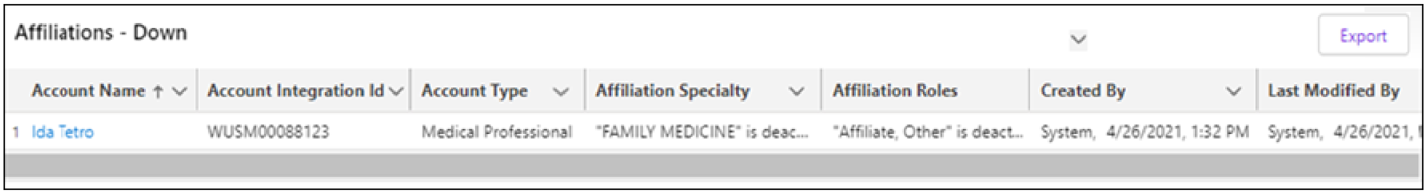

Affiliations - Up

Export

	Account Name	Account Integr...	Account Type	Affiliation Speci...	Affiliation Roles	Created By	Last Modified By
1	Regal Medical Group	WUSE00610075	Department	"Independent Physici...	Affiliate	System, 4/26/2021, 1:32 PM	System, 4/26/2021, 1:32 PM
2	One Community Medical	WUSE00687128	Practice	"INTERNAL MEDICIN...	Duplicate	System, 4/26/2021, 1:32 PM	System, 4/26/2021, 1:32 PM
3	Ronald Reagan University	WUSH00003344	Institution	"General Acute" is de...	Admitting	System, 4/26/2021, 1:32 PM	System, 4/26/2021, 1:32 PM

- **Account Name**: Name of the parent account.
- **Account Integration ID**: Unique account identification number of the parent account.
- **Account Type**: Account type of the parent account.
- **Affiliation Specialty**: Area of expertise.
- **Affiliation Roles**: Role of the parent account.
- **Created By**: A combination of the creator's user name and the date/time the affiliations were created. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.
- **Last Modified By**: A combination of the user name of the last person to edit the affiliations and the date/time they were updated. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.

Affiliations-Down



Affiliations - Down

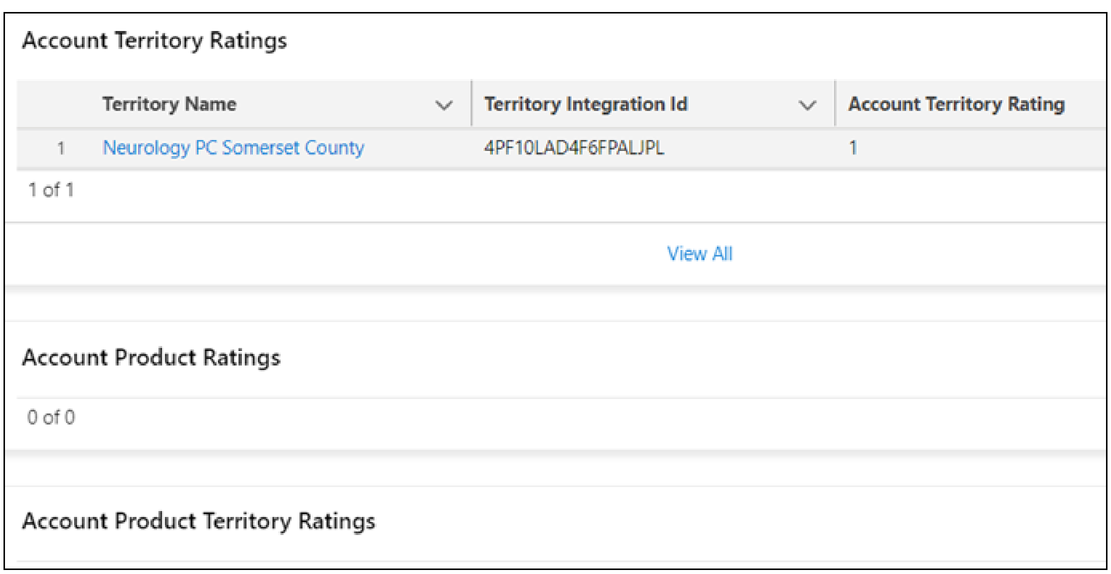
Export

	Account Name	Account Integration Id	Account Type	Affiliation Specialty	Affiliation Roles	Created By	Last Modified By
1	Ida Tetro	WUSM00088123	Medical Professional	"FAMILY MEDICINE" is deac...	"Affiliate, Other" is deact...	System, 4/26/2021, 1:32 PM	System, 4/26/2021,

- **Account Name**: Name of the child account.
- **Account Integration ID**: Unique account identification number of the child account.
- **Account Type**: Account type of the child account.
- **Affiliation Specialty**: Area of expertise.
- **Affiliation Roles**: Role of the child account.
- **Created By**: A combination of the creator's user name and the date/time the affiliations were created. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.
- **Last Modified By**: A combination of the user name of the last person to edit the affiliations and the date/time they were updated. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.

Accounts Ratings Tab

The **Ratings** tab displays account ratings and account product ratings that have been loaded by API or synced from OCE Personal.



Account Territory Ratings

	Territory Name	Territory Integration Id	Account Territory Rating
1	Neurology PC Somerset County	4PF10LAD4F6FPALJPL	1

1 of 1

View All

Account Product Ratings

0 of 0

Account Product Territory Ratings

Account Territory Ratings

- **Territory Name**: Name of the territory.
- **Territory Integration Id**: Unique territory identification number of the territory that the account is explicitly aligned to.
- **Rating Name**: Name of the rating.

Account Product Ratings

- **Product Name**: Name of the product.
- **Product Integration Id**: Unique product identification number.
- **Rating Name**: Name of the rating.

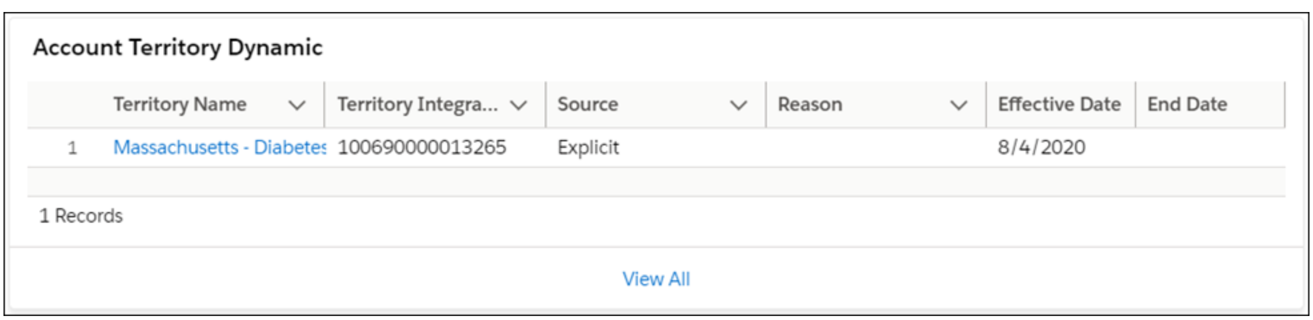
Account Product Territory Ratings

- **Territory Name**: Name of the territory that the account is aligned to.
- **Territory Integration Id**:Unique territory identification number of the territory that the account is explicitly aligned to.
- **Product Name**: Name of the product.
- **Product Integration Id**: Unique product identification number.
- **Rating Name**: Name of the rating.

Accounts Alignments Tab

The **Alignments** tab displays active and inactive alignments and exclusions for the account based on the As Of Date.

Account Territory Dynamic



Account Territory Dynamic

	Territory Name	Territory Integra...	Source	Reason	Effective Date	End Date
1	Massachusetts - Diabetes	100690000013265	Explicit		8/4/2020	

1 Records

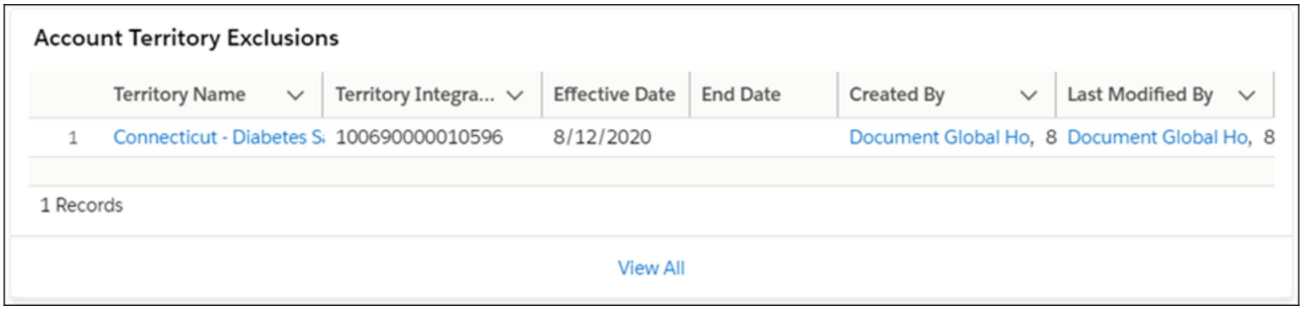
View All

- **Territory Name**: Name of territory that the account is dynamically aligned to.
- **Territory Integration ID**: Unique territory identification number of the territory that the account is dynamically aligned to.
- **Source**: *Dynamic* or *Explicit*.
- **Reason**: Lists rules' names involved in the dynamic account territory alignment.
- **Effective Date**: Indicates the date when the account territory alignment is active/valid.
- **End Date**: Indicates the date after which the account territory alignment is no longer active/valid.

Account Territory Explicits

- **Territory Name**: Name of territory that the account is explicitly aligned to.
- **Territory Integration ID**: Unique territory identification number of the territory that the account is explicitly aligned to.
- **Effective Date**: Indicates the date when the account territory alignment is active/valid.
- **End Date**: Indicates the date after which the account territory alignment is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account territory alignment was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account territory alignment and the date/time it was updated.

Account Territory Exclusions


Account Territory Exclusions

	Territory Name	Territory Integra...	Effective Date	End Date	Created By	Last Modified By
1	Connecticut - Diabetes S	100690000010596	8/12/2020		Document Global Ho, 8	Document Global Ho, 8

1 Records

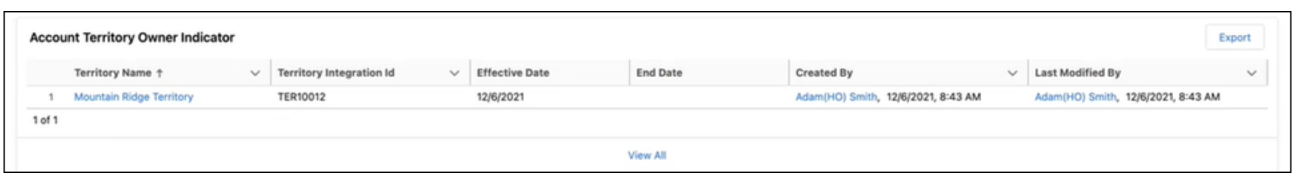
View All

- **Territory Name**: Name of territory that the account is excluded from; that is not considered by the dynamic alignment engine.
- **Territory Integration ID**: Unique territory identification number of the territory that the account is excluded from.
- **Effective Date**: Indicates the date when the account territory exclusion is active/valid.
- **End Date**: Indicates the date after which the account territory exclusion is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account territory exclusion was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account territory exclusion and the date/time it was updated.

Account Territory Owner Indicator

The Account Territory Owner Indicator grid displays the accounts owned by the territory or the accounts that the territory is primarily responsible for. Use this grid to identify the primary owner when an account is aligned to more than one territory.

Note: This grid displays only if you have Account Owner Indicator permissions. Contact your system administrator for more information.


Account Territory Owner Indicator

Export

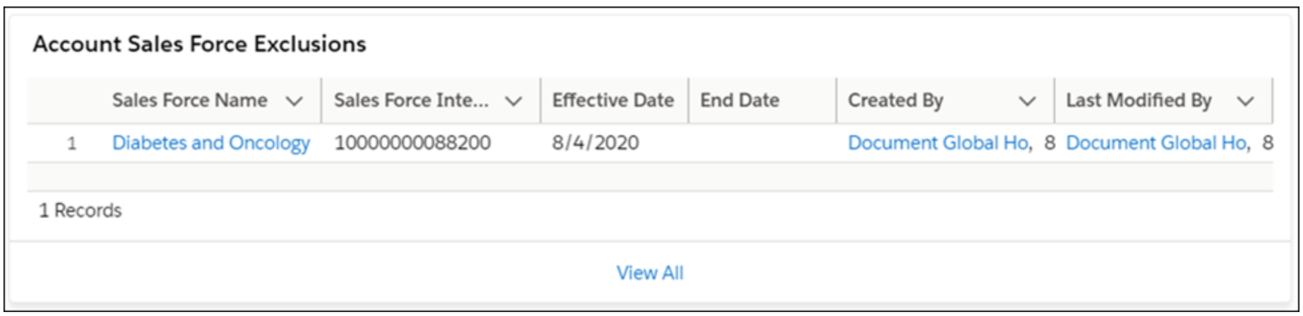
	Territory Name ↑	Territory Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Mountain Ridge Territory	TER10012	12/6/2021		Adam(HO) Smith, 12/6/2021, 8:43 AM	Adam(HO) Smith, 12/6/2021, 8:43 AM

1 of 1

View All

- **Territory Name**: Name of the territory.
- **Territory Integration ID**: Unique territory identification number.
- **Effective Date**: Indicates the date when the account territory owner indicator is active/valid.
- **End Date**: Indicates the date after which the account territory owner indicator is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account territory owner indicator was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account territory owner indicator and the date/time it was updated.

Account Sales Force Exclusions



Account Sales Force Exclusions

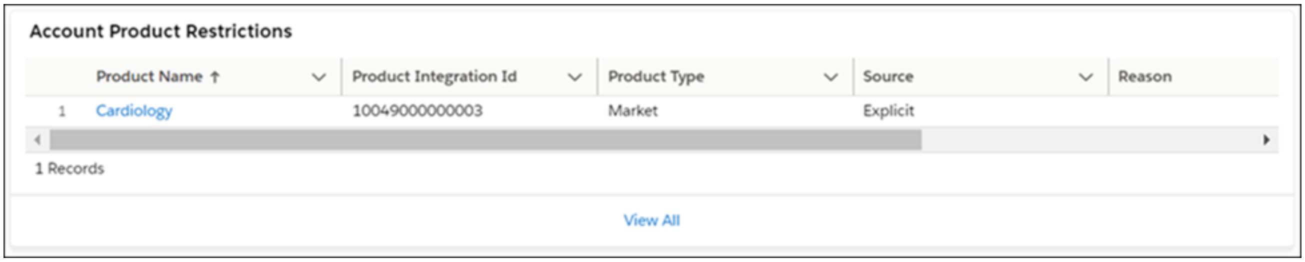
	Sales Force Name	Sales Force Inte...	Effective Date	End Date	Created By	Last Modified By
1	Diabetes and Oncology	10000000088200	8/4/2020		Document Global Ho, 8	Document Global Ho, 8

1 Records

View All

- **Sales Force Name**: Name of the sales force that the account is excluded from; that is not considered by the dynamic alignment engine.
- **Sales Force Integration ID**: Unique sales force identification number of the sales force that the account is excluded from.
- **Effective Date**: Indicates the date when the account sales force exclusion is active/valid.
- **End Date**: Indicates the date after which the account sales force exclusion is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account sales force exclusion was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account sales force exclusion and the date/time it was updated.

Account Product Restrictions



Account Product Restrictions

	Product Name	Product Integration Id	Product Type	Source	Reason
1	Cardiology	10049000000003	Market	Explicit	

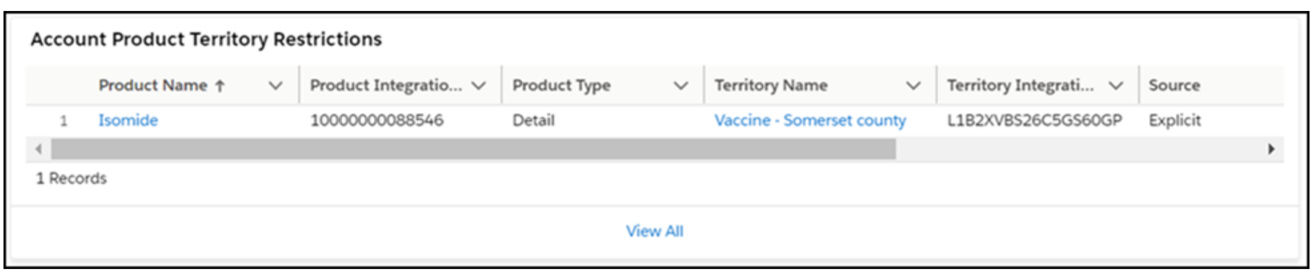
1 Records

View All

- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product.
- **Source**: *Dynamic* or *Explicit*.
- **Reason**: Lists rules' names involved in the account product restriction.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.

Account Product Territory Restrictions

Account Product Restrictions help manage compliance related restrictions. For example, if a Rep has five products and multiple physician specialties, and one of the products should not be detailed to Pediatricians, this can be managed via Account Product Territory Restrictions.



Account Product Territory Restrictions

	Product Name	Product Integratio...	Product Type	Territory Name	Territory Integrati...	Source
1	Isomide	10000000088546	Detail	Vaccine - Somerset county	L1B2XVBS26C5GS60GP	Explicit

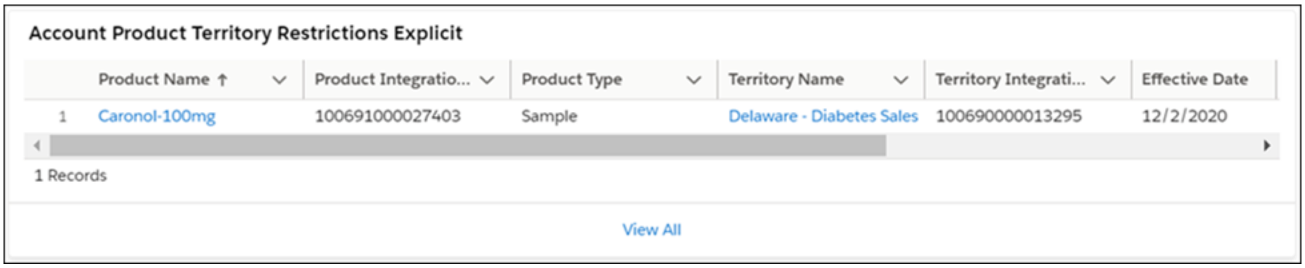
1 Records

View All

- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product.

- **Territory Integration ID**: Unique territory identification number of the territory that the account is aligned to.
- **Source**: *Dynamic* or *Explicit*.
- **Reason**: Lists rules' names involved in the account product territory restriction.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.

Account Product Territory Restrictions Explicit


Account Product Territory Restrictions Explicit

	Product Name	Product Integratio...	Product Type	Territory Name	Territory Integrati...	Effective Date
1	Caronol-100mg	100691000027403	Sample	Delaware - Diabetes Sales	100690000013295	12/2/2020

1 Records

View All

- **Product Name**: Name of the product.
- **Product Integration ID**: Unique product identification number.
- **Product Type**: The type of product.
- **Territory Name**: Name of the territory the account is aligned to.
- **Territory Integration ID**: Unique territory identification number of the territory that the account is aligned to.
- **Effective Date**: Indicates the date when the restriction is active/valid.
- **End Date**: Indicates the date after which the restriction is no longer active/valid.
- **Created By**: A combination of the creator's user name and the date/time the account was created.
- **Last Modified By**: A combination of the user name of the last person to edit the account and the date/time it was updated.

Accounts Alignments History-Time Tab

The **Alignments History-Time** tab displays the same information as the **Alignments** tab, except it shows all past, current, and future views of the alignments and exclusions for the account. This tab shows information for both active and inactive accounts.

Account Territory Dynamic

Account Territory Dynamic

	Territory Name	Territory Integra...	Source	Reason	Effective Date	End Date
1	Massachusetts - Diabetes	100690000013265	Explicit		8/4/2020	

1 Records

View All

For details on the fields in this section, see the **Account Territory Dynamic** section in Accounts Alignments Tab.

Account Territory Explicits

Account Territory Explicits

	Territory Name	Territory Integra...	Effective Date	End Date	Created By	Last Modified By
1	Massachusetts - Diabetes	100690000013265	8/4/2020		Document Global Ho, 8	Document Global Ho, 8

1 Records

View All

For details on the fields in this section, see the **Account Territory Explicits** section in Accounts Alignments Tab.

Account Territory Exclusions

Account Territory Exclusions

	Territory Name	Territory Integra...	Effective Date	End Date	Created By	Last Modified By
1	Connecticut - Diabetes S	100690000010596	8/12/2020		Document Global Ho, 8	Document Global Ho, 8

1 Records

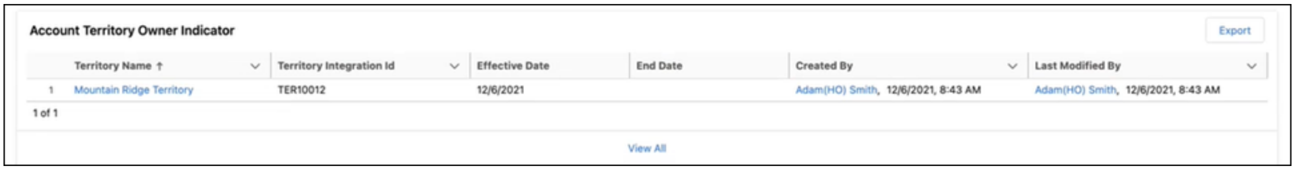
View All

For details on the fields in this section, see the **Account Territory Exclusions** section in Accounts Alignments Tab.

Account Territory Owner Indicator

The Account Territory Owner Indicator grid displays the accounts owned by the territory or the accounts that the territory is primarily responsible for. Use this grid to identify the primary owner when an account is aligned to more than one territory.

> **Note:** This grid displays only if you have Account Owner Indicator permissions. Contact your system administrator for more information.



Account Territory Owner Indicator

Export

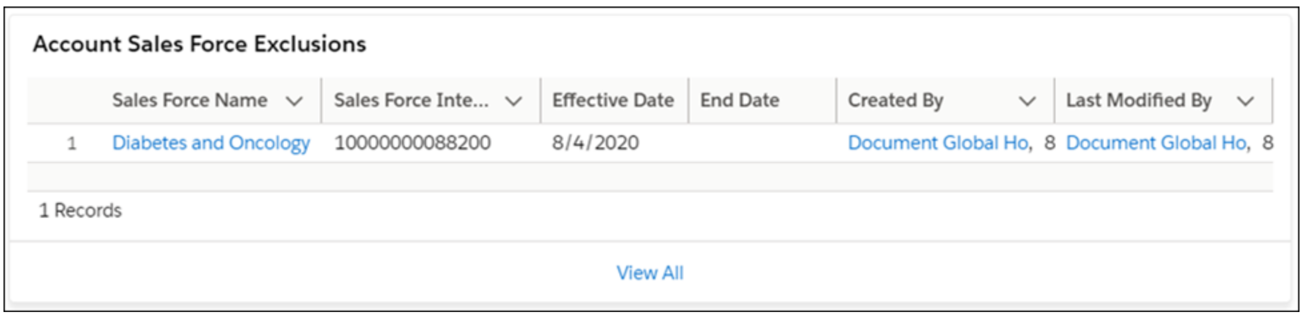
	Territory Name	Territory Integration Id	Effective Date	End Date	Created By	Last Modified By
1	Mountain Ridge Territory	TER10012	12/6/2021		Adam(HO) Smith, 12/6/2021, 8:43 AM	Adam(HO) Smith, 12/6/2021, 8:43 AM

1 of 1

View All

For details on the fields in this section, see the **Account Territory Owner Indicator** section in Accounts Alignments Tab.

Account Sales Force Exclusions



Account Sales Force Exclusions

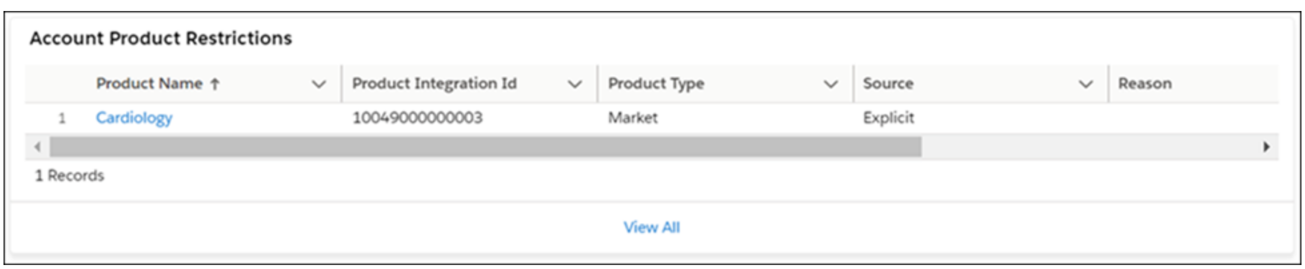
	Sales Force Name	Sales Force Inte...	Effective Date	End Date	Created By	Last Modified By
1	Diabetes and Oncology	10000000088200	8/4/2020		Document Global Ho, 8	Document Global Ho, 8

1 Records

View All

For details on the fields in this section, see the **Account Sales Force Exclusions** section in Accounts Alignments Tab.

Account Product Restrictions



Account Product Restrictions

	Product Name	Product Integration Id	Product Type	Source	Reason
1	Cardiology	10049000000003	Market	Explicit	

1 Records

View All

For details on the fields in this section, see the **Account Product Restrictions** section in Accounts Alignments Tab.

Account Product Territory Restrictions

Account Product Territory Restrictions

	Product Name	Product Integratio...	Product Type	Territory Name	Territory Integrati...	Source
1	Isomide	10000000088546	Detail	Vaccine - Somerset county	L1B2XVBS26C5GS60GP	Explicit

1 Records

View All

For details on the fields in this section, see the **Account Product Territory Restrictions** section in Accounts Alignments Tab.

Account Product Territory Restrictions Explicit

Account Product Territory Restrictions Explicit

	Product Name	Product Integratio...	Product Type	Territory Name	Territory Integrati...	Effective Date
1	Caronol-100mg	100691000027403	Sample	Delaware - Diabetes Sales	100690000013295	12/2/2020

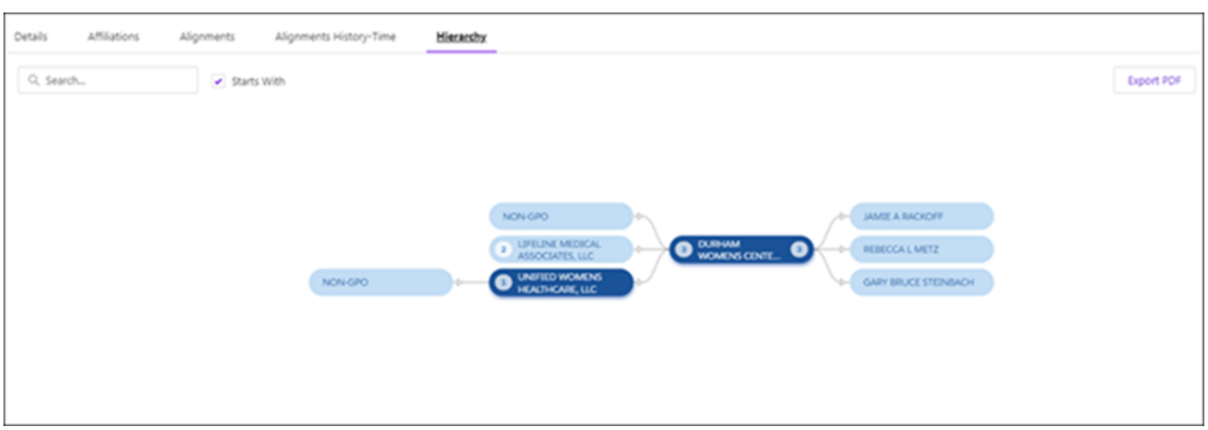
1 Records

View All

For details on the fields in this section, see the **Account Product Territory Restrictions Explicit** section in Accounts Alignments Tab.

Accounts Hierarchy Tab

The **Account Hierarchy** tab displays the parent-child hierarchy in a pictorial form. The data displayed is based on the **As Of Date** field.



The hierarchy diagram displays the selected account in the middle. If the account has parent affiliations linked to it, they are displayed to the left. If the account has child affiliations linked to it, they are displayed to the right.

Each node contains the account name and account integration ID. If the accounts have parent and child affiliations linked to them, the node changes from light blue to dark blue when expanded. The total number of linked parent/child affiliations are displayed in the node (parent number is on the left and child number is on the right).

To view the details of an account, click the account name in the node.

To export hierarchy chart results to a PDF file, click **Export PDF**.

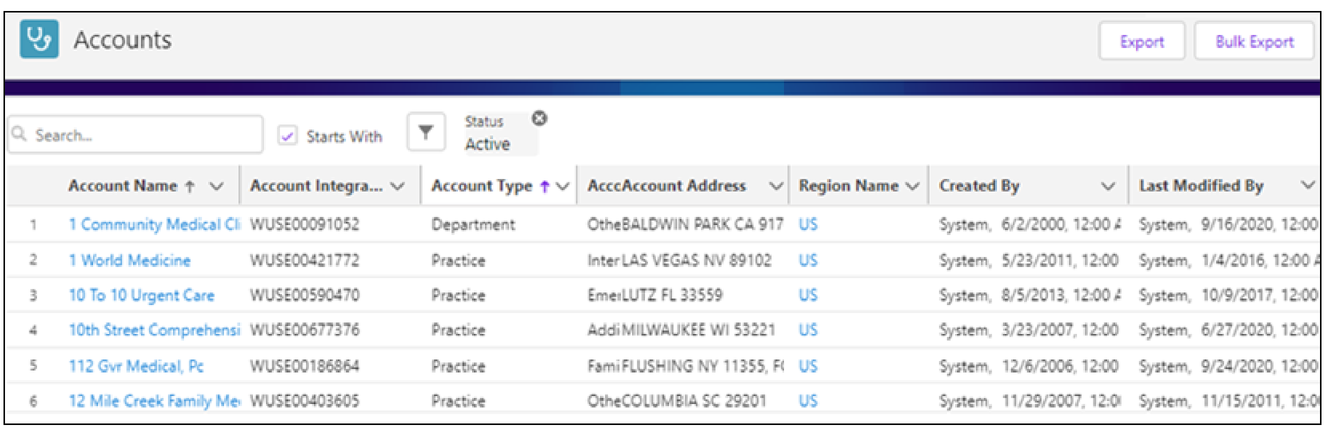
View Account Information (Reps and District Managers)

The **Accounts** module displays general information about the accounts, external IDs, account addresses, and affiliations.

To view account information

1. Click **Accounts** from the primary navigation bar.
2. From the Accounts screen, select the account you want to view.

   > **Note:** Use the **Search** and **Filters** functions to help you locate the account. See [Search and Filter Functions](#).

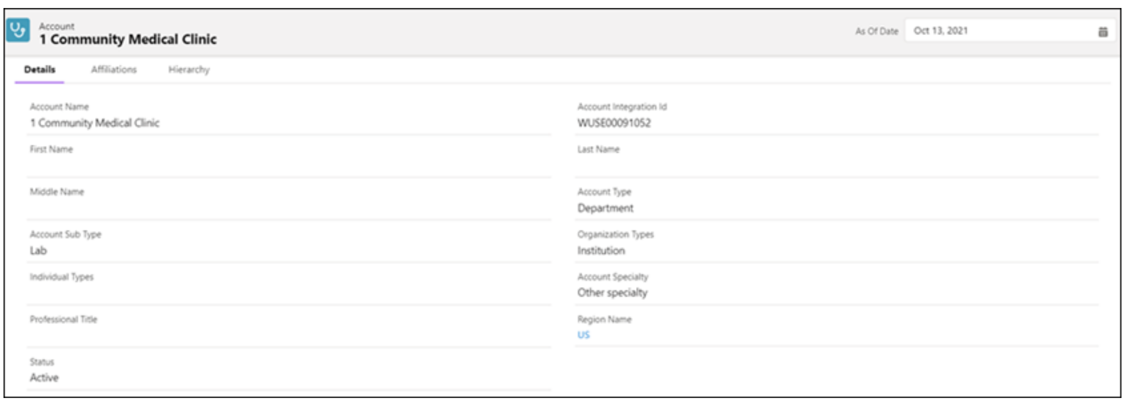
3. View the account information.

   The **Account Name**, **As Of Date**, and the **Account** highlight section are displayed on the top of the Account entity page for all the Account tabs.

As Of Date: The data displayed for the account territory alignment is based on the date selected in this field. Display of other account data is not dependent on the As Of Date.

Highlight Section

- **Account Name**: Name of the account.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Account's area of expertise.



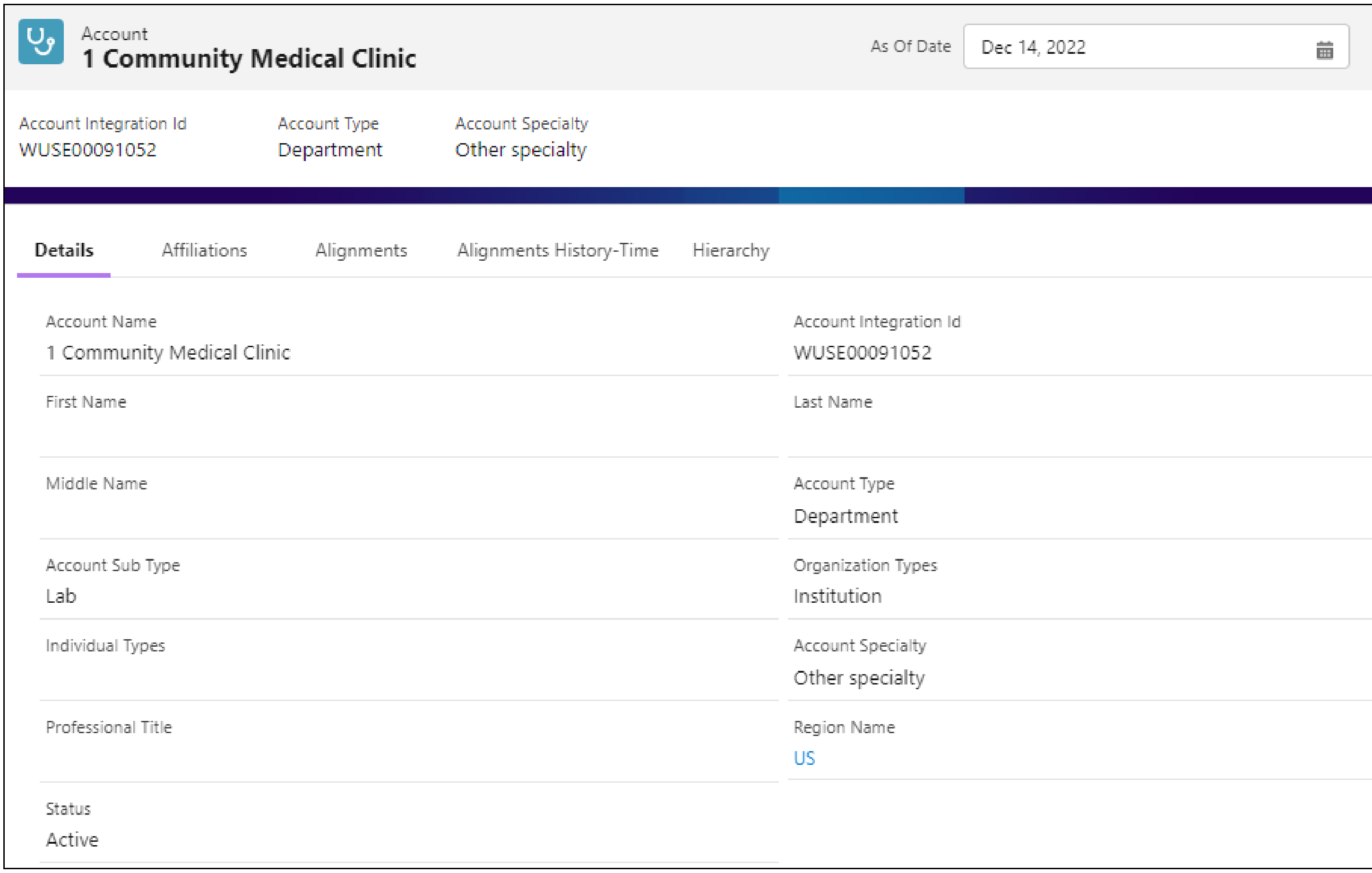
For details regarding the information displayed in each tab of the Accounts screen, see:

- Accounts Details Tab
- Accounts Affiliations Tab
- Accounts Hierarchy Tab

Accounts Details Tab

The **Details** tab contains general information about the accounts, external IDs, and account addresses.

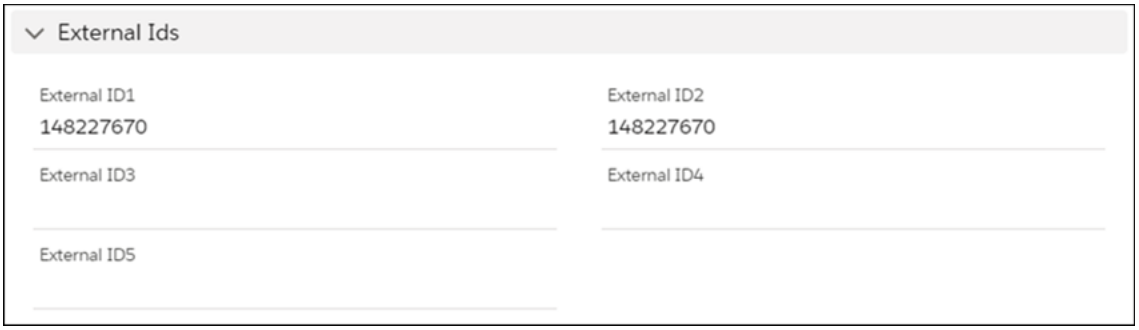
General Information



- **Account Name**: Name of the health care professional or health care organization.
- **Account Integration ID**: Unique account identification number.
- **First Name**: First name of the health care professional.
- **Middle Name**: Middle name or initial of the health care professional.
- **Last Name**: Last Name of the health care professional.
- **Account Type**: Health care professional or health care organization.
- **Account Sub Type**: Account's area of expertise.
- **Organization Types**: Type of health care organization.
- **Individual Types**: Type of health care professionals.
- **Account Specialty**: Area or expertise.

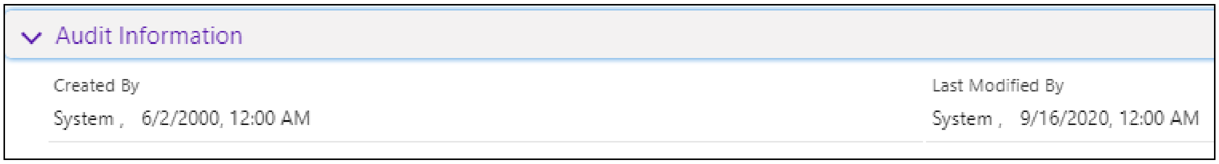
- **Professional Title**: health care professional's title.
- **Region Name**: Name of the region associated with the account.
- **Status**: *Active* or *Inactive*.

External IDs



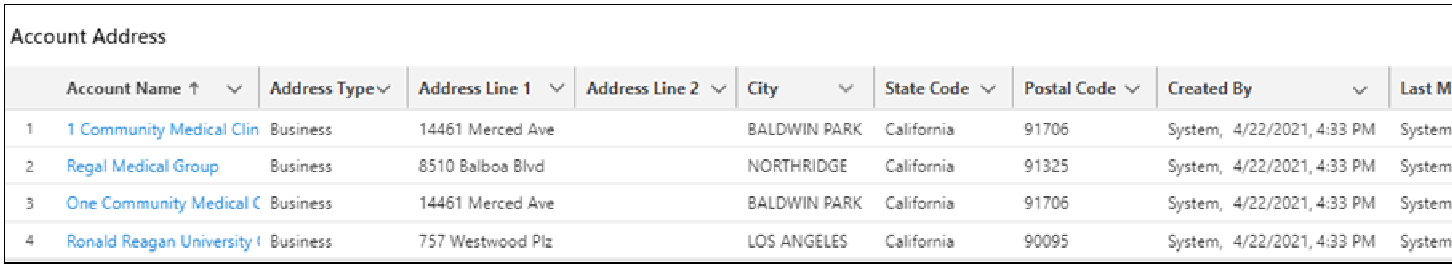
- **External ID1—ID5**: Up to 5 additional identification numbers for cross referencing.

Audit Information



- **Created By**: A combination of the creator's user name and the date/time the changes were made.
- **Last Modified By**: A combination of the user name of the last person to make the changes and the date/time they were made.

Account Address


Account Address

	Account Name	Address Type	Address Line 1	Address Line 2	City	State Code	Postal Code	Created By	Last M
1	1 Community Medical Clin	Business	14461 Merced Ave		BALDWIN PARK	California	91706	System, 4/22/2021, 4:33 PM	System
2	Regal Medical Group	Business	8510 Balboa Blvd		NORTHRIDGE	California	91325	System, 4/22/2021, 4:33 PM	System
3	One Community Medical C	Business	14461 Merced Ave		BALDWIN PARK	California	91706	System, 4/22/2021, 4:33 PM	System
4	Ronald Reagan University (	Business	757 Westwood Plz		LOS ANGELES	California	90095	System, 4/22/2021, 4:33 PM	System

- **Account Name**: Organization or person associated with the corresponding address.
- **Address Type**: Description that classifies the address type, such as Home/Office, Mailing, Shipping, or Storage.
- **Address Line 1**: The street address of the account.
- **Address Line 2**: Additional address information, if applicable.
- **City**: The city where the account is.
- **State Code**: The state code that corresponds with the state where the account is.
- **Postal Code**: The postal code of the city where the account is.
- **Created By**: A combination of the creator's user name and the date/time the changes were made.
- **Last Modified By**: A combination of the user name of the last person to make the changes and the date/time they were made.

Accounts Affiliations Tab

The **Affiliations** tab displays all active affiliations for the account in which the account is considered the child (Affiliations-Up) of the relationship and all active affiliations for the account in which the account is considered the parent (Affiliations-Down) of the relationship.

Affiliations-Up

Affiliations - Up

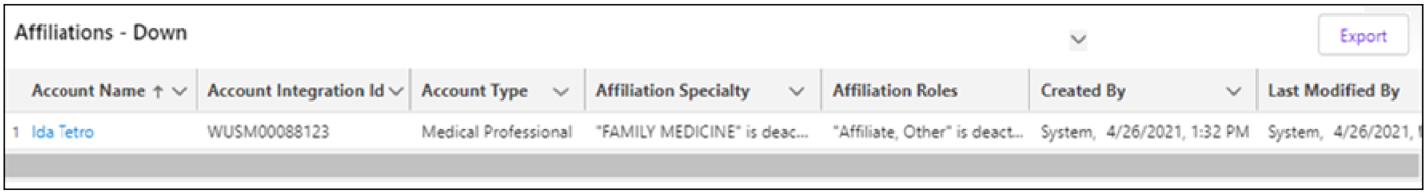
Export

	Account Name	Account Integr...	Account Type	Affiliation Speci...	Affiliation Roles	Created By	Last Modified By
1	Regal Medical Group	WUSE00610075	Department	"Independent Physici...	Affiliate	System, 4/26/2021, 1:32 PM	System, 4/26/2021, 1:32 PM
2	One Community Medical	WUSE00687128	Practice	"INTERNAL MEDICIN...	Duplicate	System, 4/26/2021, 1:32 PM	System, 4/26/2021, 1:32 PM
3	Ronald Reagan Universit	WUSH00003344	Institution	"General Acute" is de...	Admitting	System, 4/26/2021, 1:32 PM	System, 4/26/2021, 1:32 PM

- **Account Name**: Name of the parent account.
- **Account Integration ID**: Unique account identification number of the parent account.
- **Account Type**: Account type of the parent account.
- **Affiliation Specialty**: Area of expertise.
- **Affiliation Roles**: Role of the parent account.

- **Created By**: A combination of the creator's user name and the date/time the affiliations were created. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.
- **Last Modified By**: A combination of the user name of the last person to edit the affiliations and the date/time they were updated. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.

Affiliations-Down


Affiliations - Down

Export

	Account Name	Account Integration Id	Account Type	Affiliation Specialty	Affiliation Roles	Created By	Last Modified By
1	Ida Tetro	WUSM00088123	Medical Professional	"FAMILY MEDICINE" is deac...	"Affiliate, Other" is deact...	System, 4/26/2021, 1:32 PM	System, 4/26/2021,

- **Account Name**: Name of the child account.
- **Account Integration ID**: Unique account identification number of the child account.
- **Account Type**: Account type of the child account.
- **Affiliation Specialty**: Area of expertise.
- **Affiliation Roles**: Role of the child account.
- **Created By**: A combination of the creator's user name and the date/time the affiliations were created. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.
- **Last Modified By**: A combination of the user name of the last person to edit the affiliations and the date/time they were updated. The user name will always be **System**. The date/time component is the date and time the record is loaded into Optimizer.

Accounts Ratings Tab

The **Ratings** tab displays account ratings and account product ratings that have been loaded by API or synced from OCE Personal.

Account Ratings Ratings

- **Rating Name**: Name of the rating.
- **Rating Value**: Value of the rating.

- **Created By**: A combination of the creator's user name and the date/time the rating was created.
- **Last Modified By**: A combination of the user name of the last person to edit the rating and the date/time it was updated.

Account Territory Ratings

- **Territory Integration Id**: Unique territory identification number of the territory that the account is explicitly aligned to.
- **Territory Name**: Name of the territory.
- **Rating Name**: Name of the rating.
- **Rating Value**: Value of the rating.
- **Created By**:A combination of the creator's user name and the date/time the rating was created.
- **Last Modified By**: A combination of the user name of the last person to edit the rating and the date/time it was updated.

Account Product Ratings

- **Product Integration Id**: Unique product identification number.
- **Product Name**: Name of the product.
- **Rating Name**: Name of the rating.
- **Rating Value**:Value of the rating.
- **Created By**:A combination of the creator's user name and the date/time the rating was created.
- **Last Modified By**: A combination of the user name of the last person to edit the rating and the date/time it was updated.

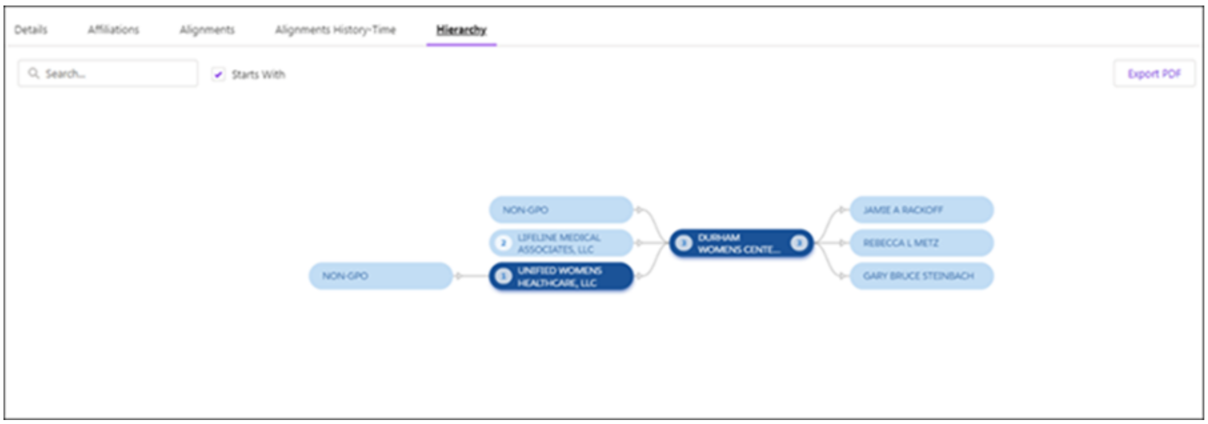
Account Product Territory Ratings

- **Territory Integration Id**:Unique territory identification number of the territory that the account is explicitly aligned to.
- **Territory Name**: Name of the territory that the account is aligned to.
- **Product Integration Id**: Unique product identification number.
- **Product Name**: Name of the product.

- **Rating Name**: Name of the rating.
- **Rating Value**:Value of the rating**.**
- **Created By**:A combination of the creator's user name and the date/time the rating was created.
- **Last Modified By**: A combination of the user name of the last person to edit the rating and the date/time it was updated.

Accounts Hierarchy Tab

The **Account Hierarchy** tab displays the parent-child hierarchy in a pictorial form. The data that displays is based on the **As Of Date** field.



The hierarchy diagram displays the selected account in the middle. If the account has parent affiliations linked to it, they display to the left. If the account has child affiliations linked to it, they display to the right.

Each node contains the account name and account integration ID. If the accounts have parent and child affiliations linked to them, the node changes from light blue to dark blue when expanded. The total number of linked parent/child affiliations are displayed in the node (parent number is on the left and child number is on the right).

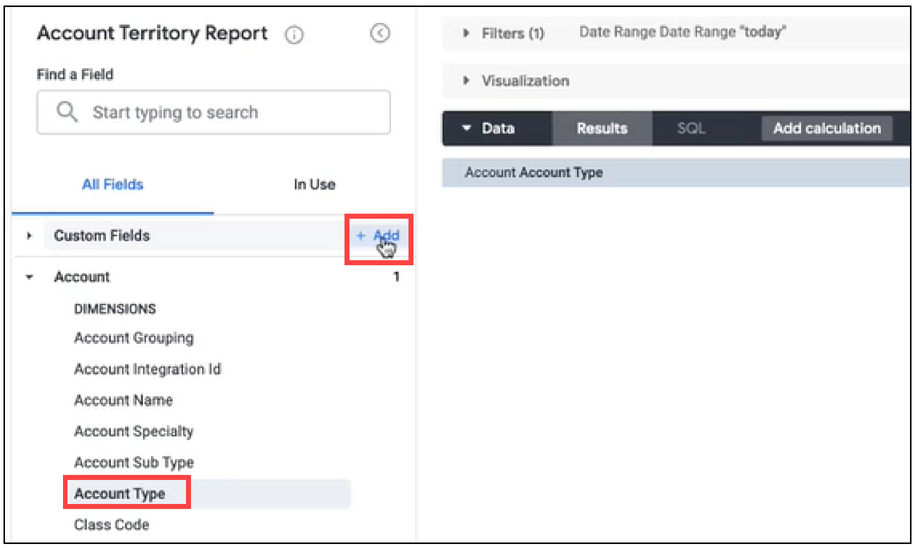
To view the details of an account, click the account name in the node.

To export hierarchy chart results to a PDF file, click **Export PDF**.

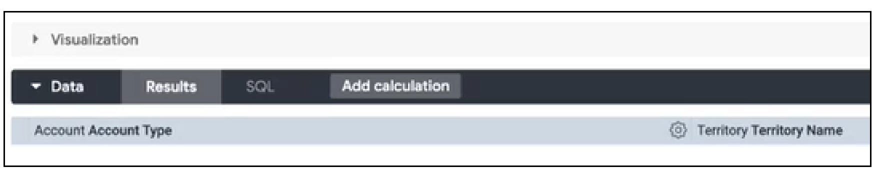
Looker Edit

A user with User Explore access has a user-friendly and meaningful set of fields available in the Explore for Territory Roster Report.

1. Click **Looker Edit**, then click the **Explores** tab.
2. Scroll down to the Account Territory Report and click it. The Account Territory Report opens, showing the list of fields already in the report.
3. To add fields to the report, click one of the categories, select a field under it, and click **Add** at the top.



The added field appears on the right.



4. Click **Run** at the top right.

Root Cause Analysis

The **Root Cause Analysis** feature provides a reason for an account being aligned or unaligned from a territory. The account alignment change can be because of an account data attribute, ratings attribute, or a rule change. You can view the reason for account alignments when the root cause is a current or past dated transaction.

> **Important:** The Root Cause Analysis is tracked for 90 days from the alignment or unalignment. After 90 days, the data is no longer available.

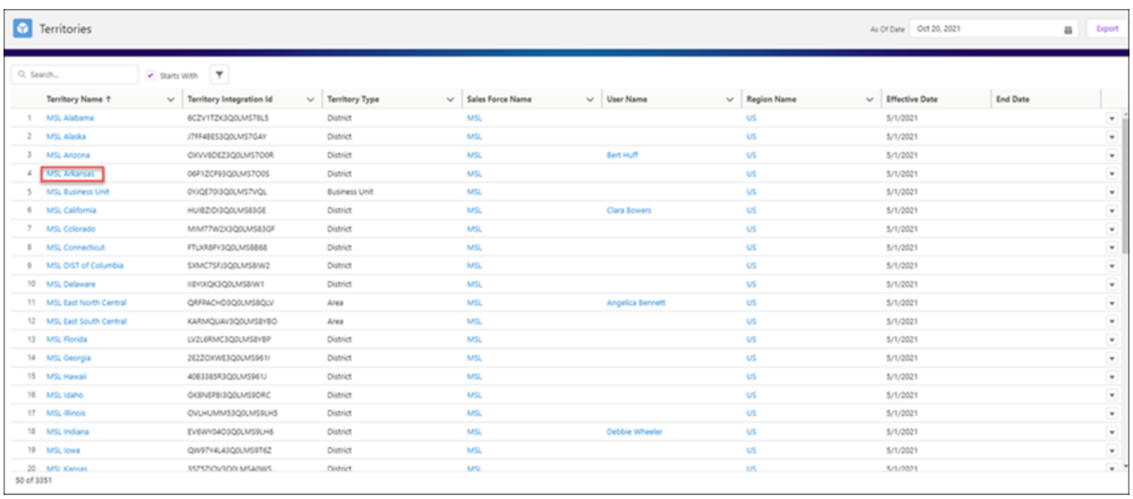
See View Root Cause Analysis.

View Root Cause Analysis

Home office and Field Admin users can access the Root Cause Analysis from the **Territories** module or the **Accounts** module.

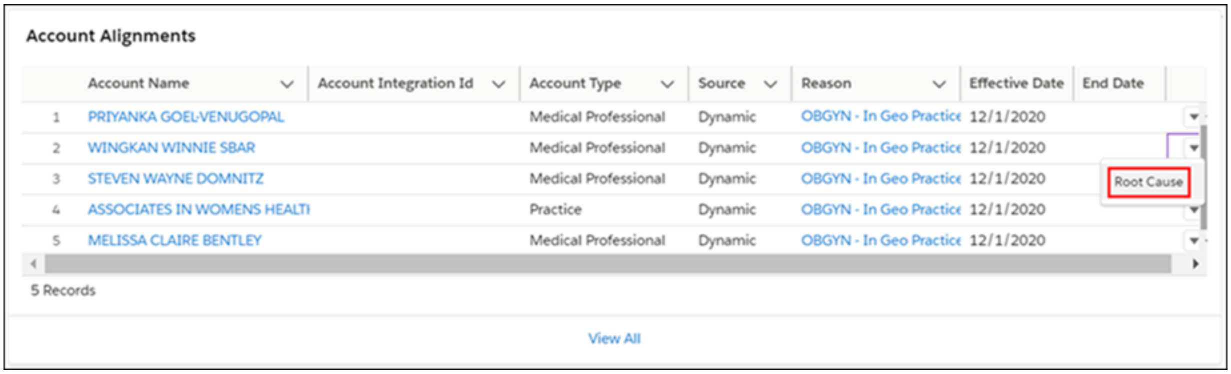
To view the Root Cause Analysis from the Territories module

1. Click **Territories** from the primary navigation bar.
2. Click the territory that contains the root cause analysis of an account you would like to view.



3. From the **Account Alignments** tab, from the **Account Alignments** section, select the drop-down of the account that contains the root cause analysis you would like to view, then click **Root Cause**.

> **Note:** You can also view the root cause analysis in the **Account Alignments** section of the **Alignments History-Time** tab.

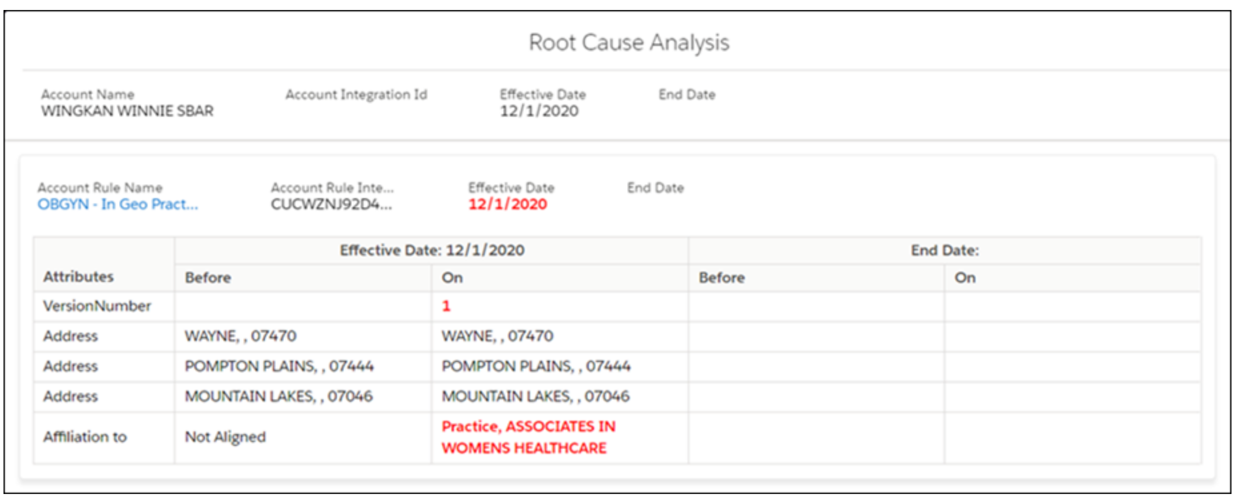


4. View the analysis.

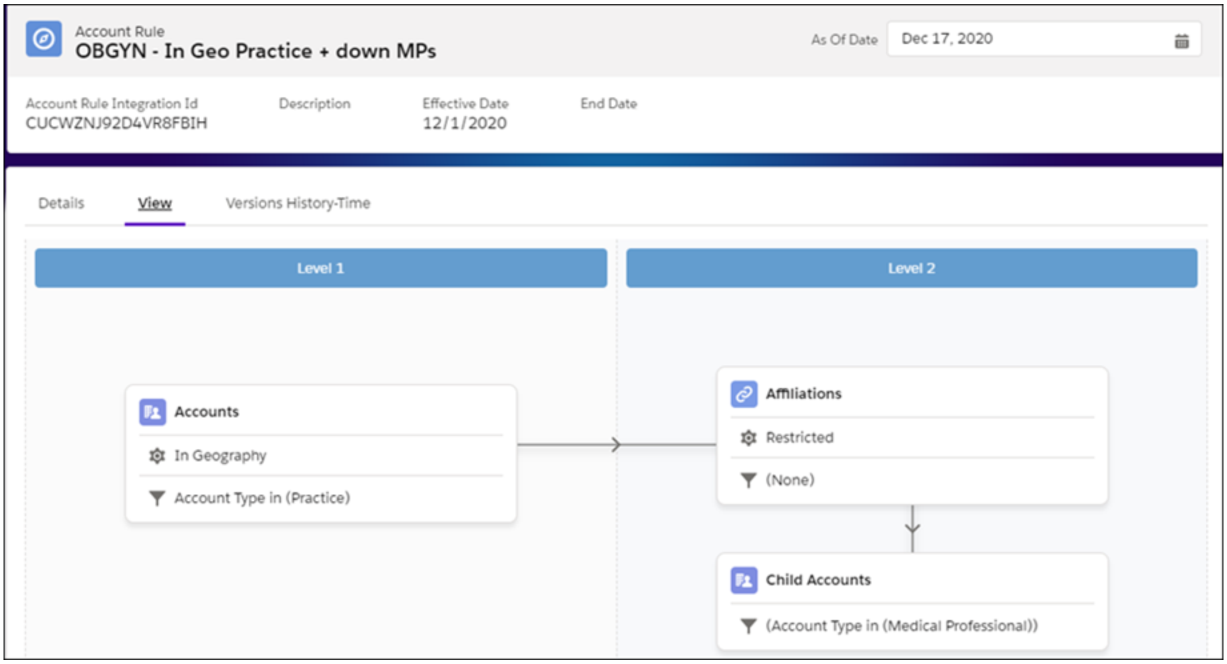
> **Note:** If a territory has moved to a different salesforce, it is no longer assigned to the previous salesforce rule and will have a *Not Aligned* value in the **End Date: On** column of the analysis.

> **Note:** You can view the details of the Root Cause Analysis based on the actual date the root transaction went into effect. For example, if a rule and an account alignment are dated June 1 and it is currently June 3, you can still view the data dated June 1.

> **Note:** To view the associated rule, click the name of the rule in the **Account Rule Name** field.

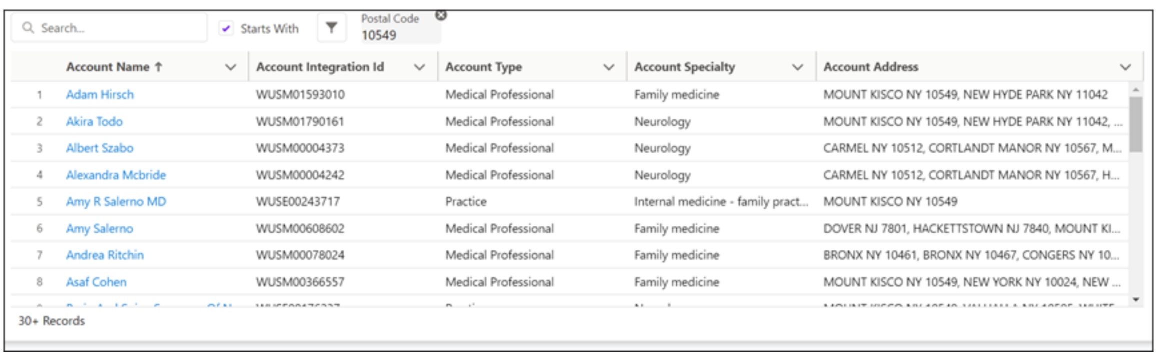


In this example, a rule was added on 12/1/2020 that aligns all medical professionals that are affiliated to practices in geography. Because Wingkan Winnie Sbar is affiliated with Associates in Women's Healthcare, it is aligned to the OBGYN-Morris County territory.



To view Root Cause Analysis from the Accounts module

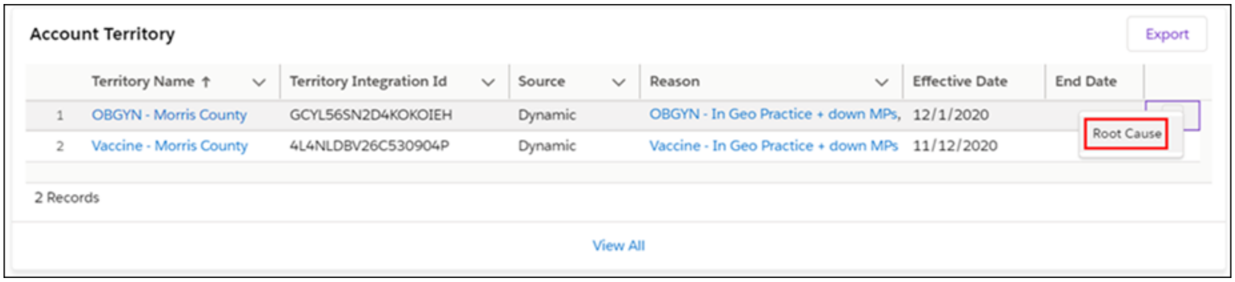
1. Click **Accounts** from the primary navigation bar.
2. Click the account that contains the root cause analysis of a territory you would like to view.



	Account Name	Account Integration Id	Account Type	Account Specialty	Account Address
1	Adam Hirsch	WUSM01593010	Medical Professional	Family medicine	MOUNT KISCO NY 10549, NEW HYDE PARK NY 11042
2	Akira Todo	WUSM01790161	Medical Professional	Neurology	MOUNT KISCO NY 10549, NEW HYDE PARK NY 11042, ...
3	Albert Szabo	WUSM00004373	Medical Professional	Neurology	CARMEL NY 10512, CORTLANDT MANOR NY 10567, M...
4	Alexandra Mcbride	WUSM00004242	Medical Professional	Neurology	CARMEL NY 10512, CORTLANDT MANOR NY 10567, H...
5	Amy R Salerno MD	WUSE00243717	Practice	Internal medicine - family pract...	MOUNT KISCO NY 10549
6	Amy Salerno	WUSM00608602	Medical Professional	Family medicine	DOVER NJ 7801, HACKETTSTOWN NJ 7840, MOUNT KI...
7	Andrea Ritchin	WUSM00078024	Medical Professional	Family medicine	BRONX NY 10461, BRONX NY 10467, CONGERS NY 10...
8	Asaf Cohen	WUSM00366557	Medical Professional	Family medicine	MOUNT KISCO NY 10549, NEW YORK NY 10024, NEW ...

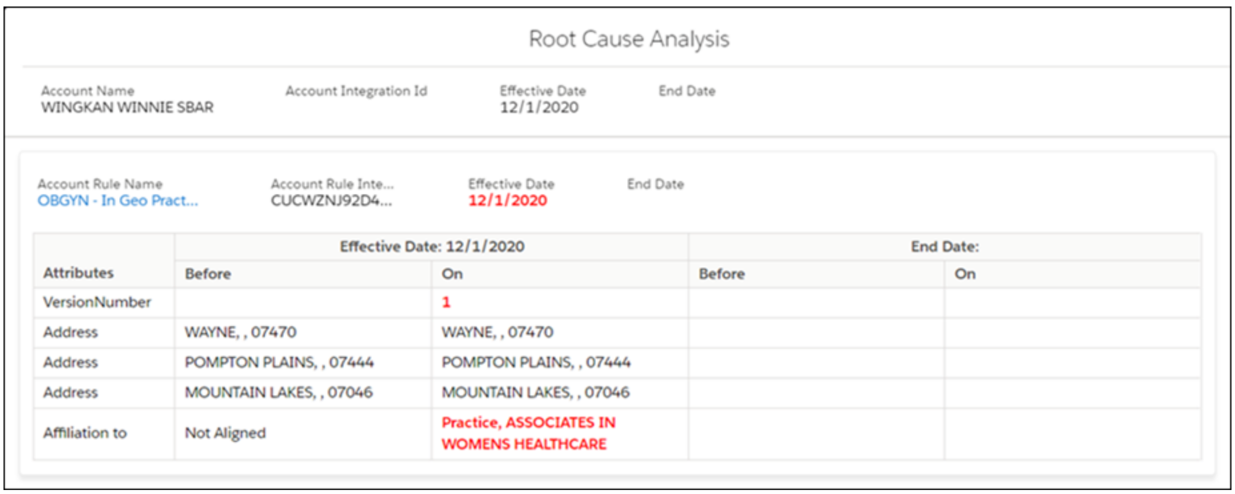
30+ Records

3. From the **Alignments** tab, go to the **Account Territory** section and select the drop-down of the territory that contains the root cause analysis you would like to view, and then click **Root Cause**.

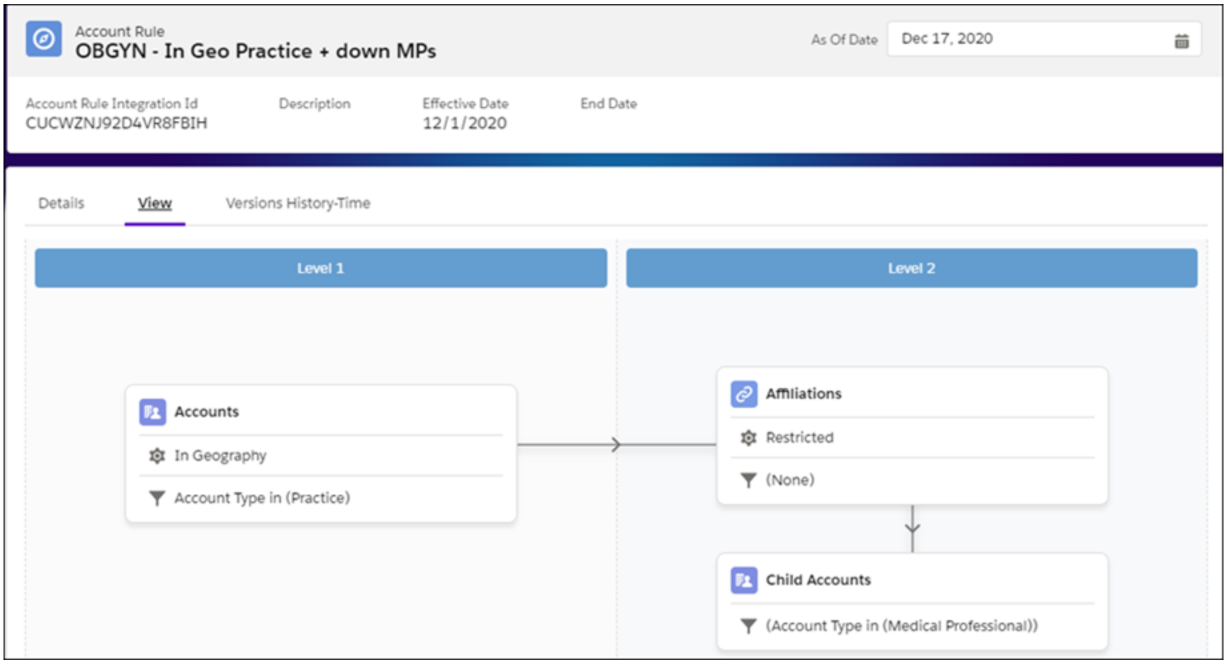


4. View the analysis.

> **Note:** To view the associated rule, click the name of the rule in the **Account Rule Name** field.



In this example, a rule was added on 12/1/2020 that aligns all medical professionals that are affiliated to practices in geography. Because Wingkan Winnie Sbar is affiliated with Associates in Women's Healthcare, it is aligned to the OBGYN-Morris County territory.


Account Rule
OBGYN - In Geo Practice + down MPs
As Of Date
Dec 17, 2020
Account Rule Integration Id
CUCWZNJ92D4VR8FBIH
Description
Effective Date
12/1/2020
End Date
Details
View
Versions History-Time
Level 1
Level 2
Accounts
In Geography
Account Type in (Practice)
Affiliations
Restricted
(None)
Child Accounts
(Account Type in (Medical Professional))

View Account Product Rules

You can view all account alignment rules via the **Account Rules** module. These rules are set up to manage explicit account product restriction at the account-product level and account-product-territory level.

Account Product Rules can be managed via the **Scenarios** module.

> **Important:** If you receive a message that **Governor Limits** have been reached, contact the Product owner immediately.

See View Account Product Rules.

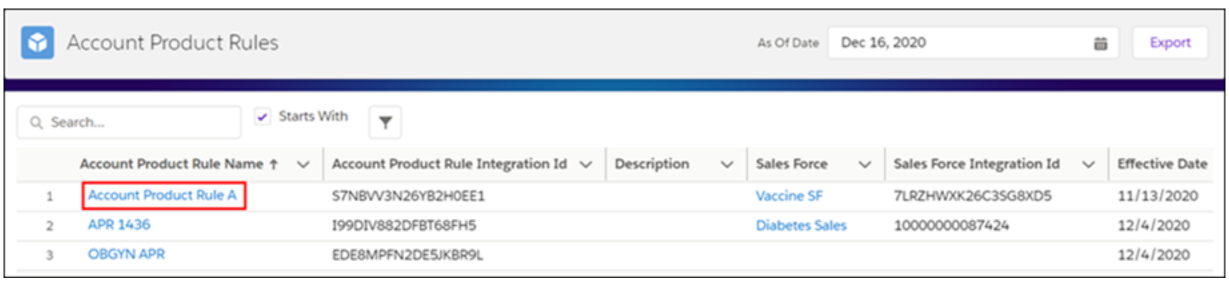
View Account Product Rules

The **Account Product Rules** module displays the rules defined for a specific Product, external IDs, audit information, a visual representation of the rule, and the history of changes to the rules.

Rules listed on the main list page are based on the **As Of Date** field.

To view account product rules

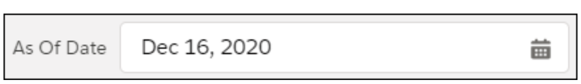
1. Click **Account Product Rules** from the primary navigation bar.
2. Select the account rule you want to view.



3. View the rule.

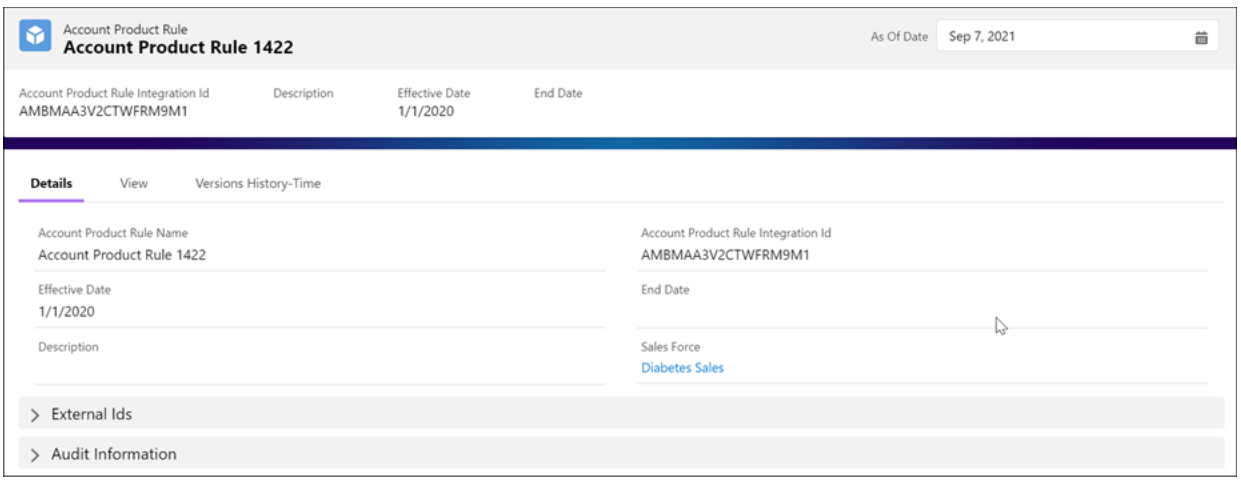
   The Rule Name, As Of Date, and the Rule highlight section are displayed on the top of the Rule entity page for all the Rule tabs.

   As Of Date: The data displayed for the rule is based on the date selected in this field.



Highlight Section

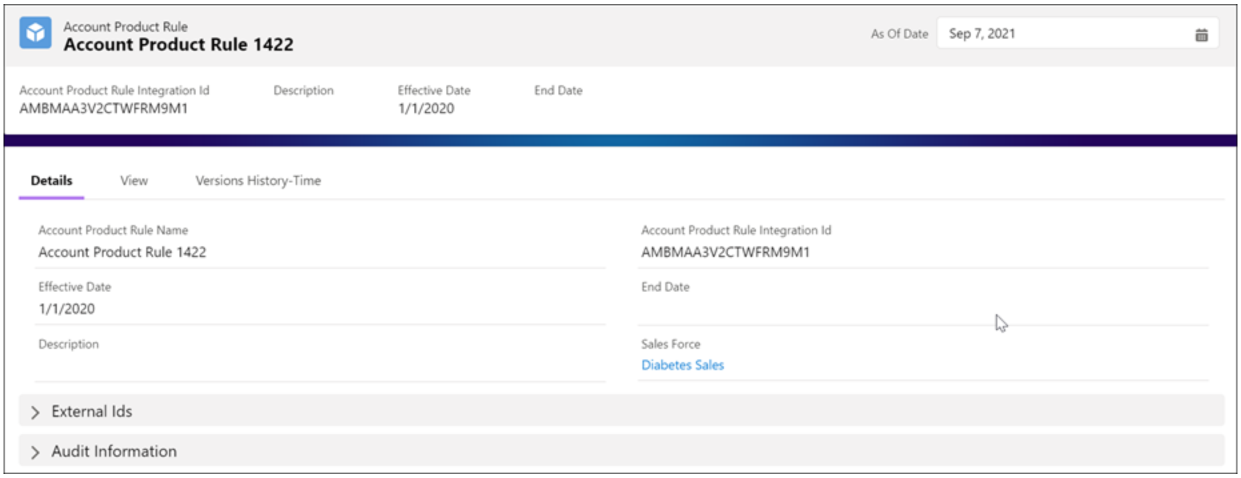
- **Account Product Rule Name**: Name of the rule.
- **Account Product Rule Integration ID**: Unique identification number of the rule.
- **Description**: Details of the rule.
- **Effective Date**: Indicates the date when the rule is active/valid.
- **End Date**: Indicates the date after which the rule is no longer active/valid.



Account Product Rule Details Tab

The **Details** tab contains general information about the rule (including the description), external IDs, and audit information. The data displayed is the current view based on the As Of Date.

General Information

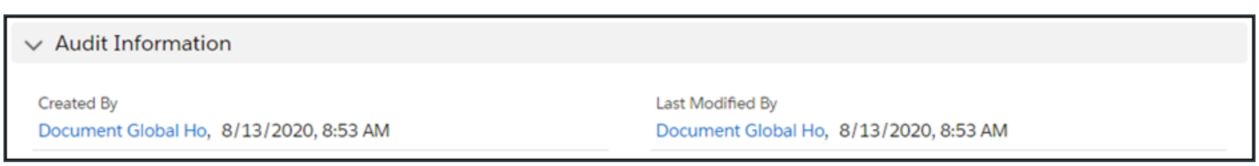


- **Account Product Rule Name**: Name of the rule.
- **Account Product Rule Integration ID**: Unique identification number of the rule.
- **Description**: Details of the rule.
- **Sales Force**: The sales force the rule applies to.
- **Effective Date**: Indicates the date when the rule is active/valid.
- **End Date**: Indicates the date after which the rule is no longer active/valid.

External IDs

- **External ID1**: An additional identification number for cross referencing.

Audit Information

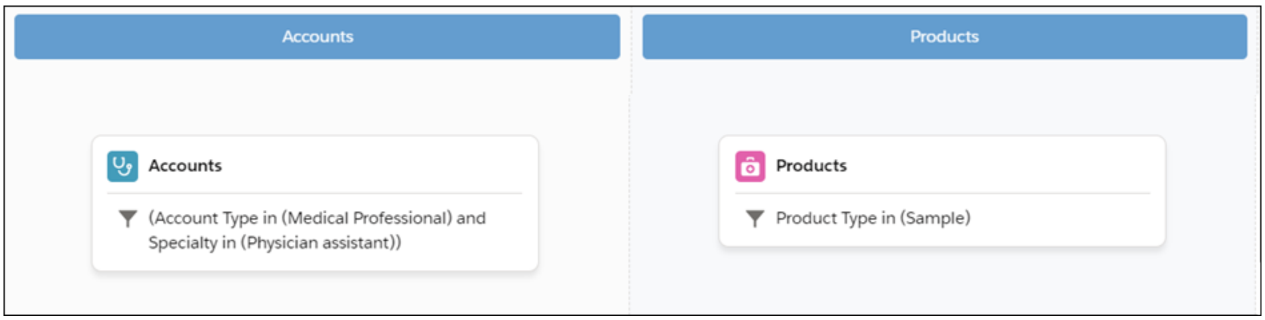


- **Created By**: A combination of the creator's user name and the date/time the rule was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the rule and the date/time it was updated.

Account Product Rule View Tab

The **View** tab displays a visual representation of the rule and provides an intuitive natural language display of the defined rule.

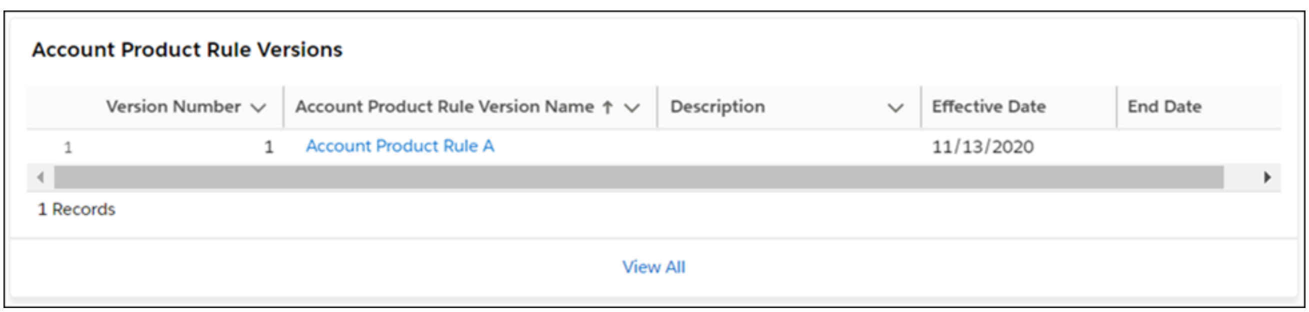
For example, the following visual representation of the rule translates to "All Medical Professionals with Specialty as a *Physician assistant* are restricted for Product Type *Sample*."



Account Product Rule Versions History-Time Tab

The **Versions History-Time** tab shows all past, current, and future views of rule versions.

Account Product Rule Versions



Account Product Rule Versions

	Version Number	Account Product Rule Version Name	Description	Effective Date	End Date
1	1	Account Product Rule A		11/13/2020	

1 Records

View All

- **Version Number**: The sequence number of the rule version.
- **Account Product Rule Version Name**: The name of the rule.
- **Description**: The details of the rule.

- **Effective Date**: Indicates the date when the rule is active/valid.
- **End Date**: Indicates the date after which the rule is no longer active/valid.

View Account Rules

You can view all account alignment rules via the **Account Rules** module. Account Rules are used for Sales Force alignments and for Engagement Plan management. When adding a rule, the **Account Rule Scope** field determines the type of rule.

Account rules that are set for a Sales Force are evaluated down to the territory level. Account Alignment Rules determine which accounts are aligned by the Dynamic Alignment Engine to create account territory alignments.

Account Rules are also created for engagement plan management. HO users must have Engagement Plan Management permissions to create an engagement plan account rule and create an engagement plan via the **Scenarios** module.

Account Alignment Rules can be simple specialty, zip-terr based, affiliation based, and extended to complex levels by combining the rule filters in *and* or *or* conditions. Users with advanced access can include additional attributes to use in the alignment rule filters.

Account Alignment Rules are managed via the **Scenarios** module.

Important: If you receive a message that **Governor Limits** have been reached, contact the Product owner immediately.

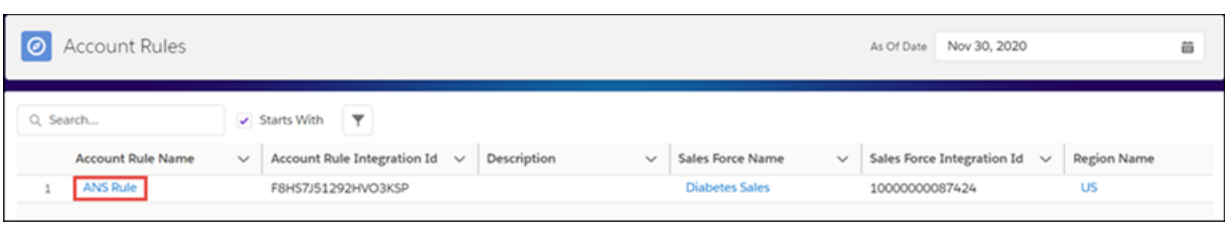
View Account Rules

The **Account Rules** module displays the rules defined for a specific Sales Force or Engagement Plan, external IDs, audit information, a visual representation of the rule, and the history of changes to the rules.

Rules listed on the main list page are based on the **As Of Date** field.

To view account rules

1. Click **Account Rules** from the primary navigation bar.
2. Select the account rule you want to view.



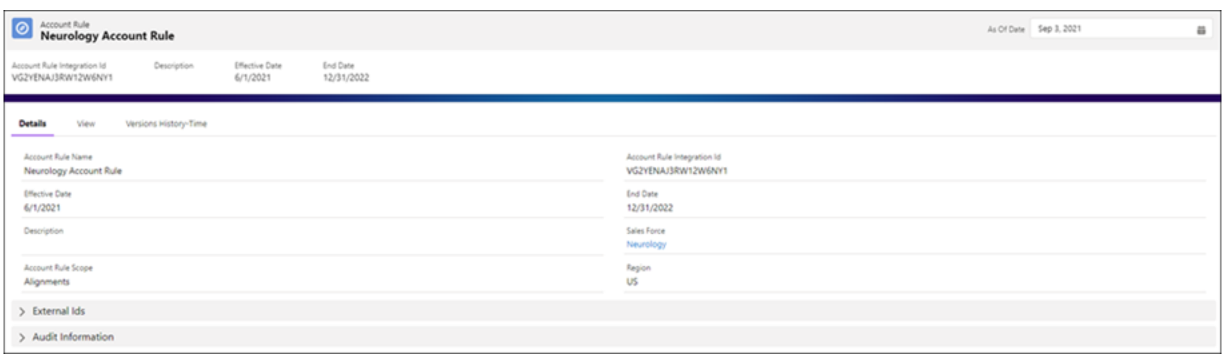
3. View the rule.

   The Rule Name, As Of Date, and the Rule highlight section are displayed on the top of the Rule entity page for all the Rule tabs.

   As Of Date: The data displayed for the rule is based on the date selected in this field.

Highlight Section

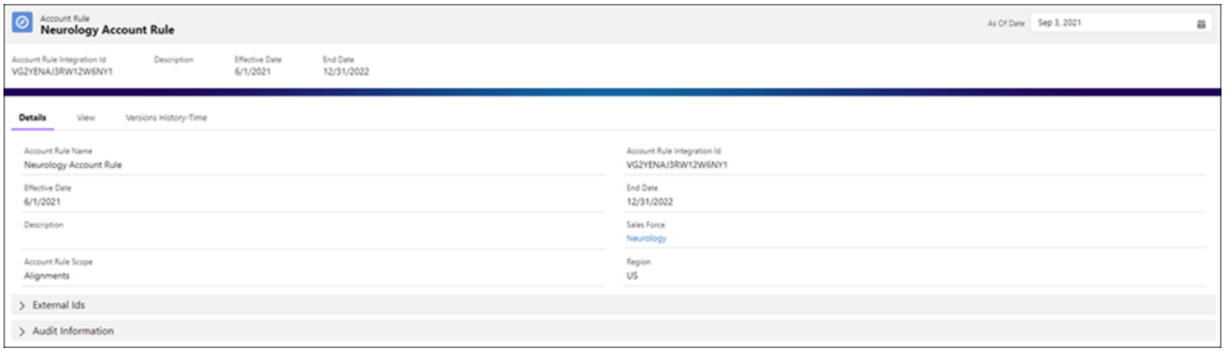
- **Account Rule Name**: Name of the rule.
- **Account Rule Integration ID**: Unique identification number of the rule.
- **Description**: Details of the rule.
- **Effective Date**: Indicates the date when the rule is active/valid.
- **End Date**: Indicates the date after which the rule is no longer active/valid.



Account Rules Details Tab

The **Details** tab contains general information about the rule (including the description), external IDs, and audit information. The data displayed is the current view based on the As Of Date.

General Information

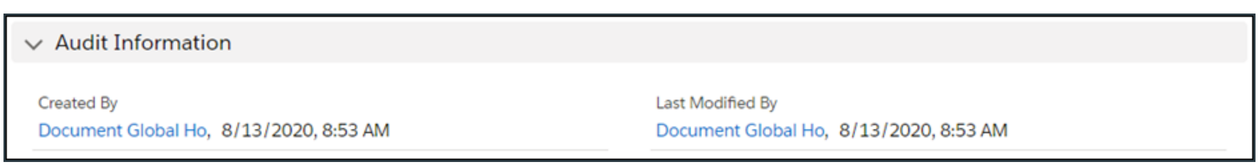


- **Account Rule Name**: Name of the rule.
- **Account Rule Integration ID**: Unique identification number of the rule.
- **Effective Date**: Indicates the date when the rule is active/valid.
- **End Date**: Indicates the date after which the rule is no longer active/valid.
- **Description**: Details of the rule.
- **Sales Force**: The sales force the rule applies to.
- **Account Rule Scope**: Indicates whether the rule is for sales force alignment (*Alignments*) or an engagement plan (*Engagement Plan* or *Alignments* + *Engagement Plan*).
- **Region**: The region the rule is aligned to.

External IDs

- **External ID1**: An additional identification number for cross referencing.

Audit Information

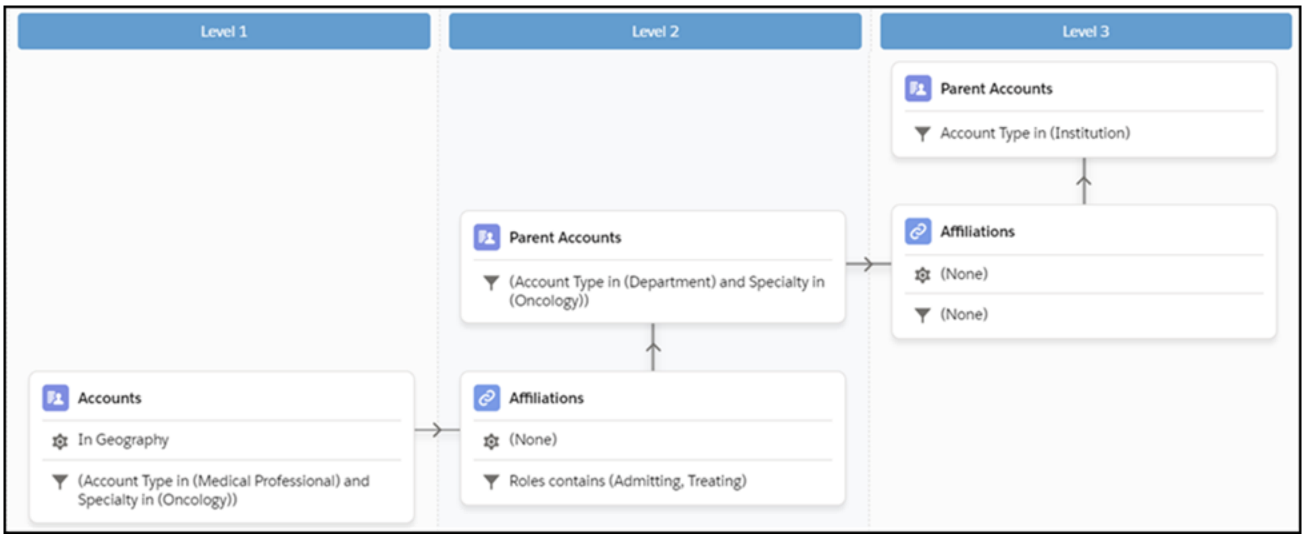


- **Created By**: A combination of the creator's user name and the date/time the rule was added to the system.
- **Last Modified By**: A combination of the user name of the last person to edit the rule and the date/time it was updated.

Account Rules View Tab

The **View** tab displays a visual representation of the rule and provides an intuitive natural language display of the defined rule.

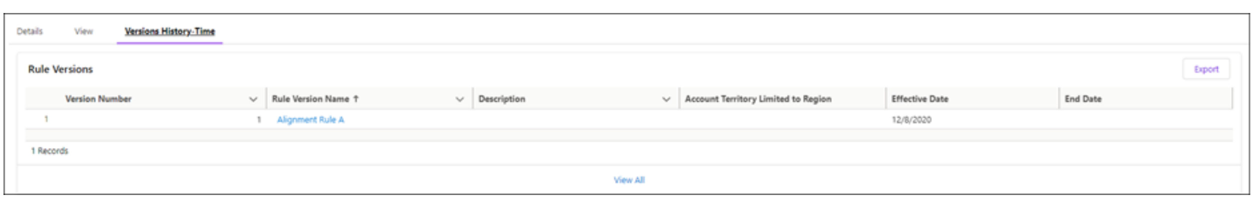
For example, the following visual representation of the rule translates to "All Medical Professionals in Geography with specialty in *Oncology* and Up Affiliation to Departments with specialty in *Oncology* and have Affiliation Role in *Admitting* or *Training* and Up Affiliation to Institutions".



Account Rules Versions History-Time Tab

The **Versions History-Time** tab shows all past, current, and future views of rule versions.

Rule Versions



- **Version Number**: The sequence number of the rule version.
- **Rule Version Name**: The name of the rule.

- **Description**: The details of the rule.
- **Account Territory Limited to Region**: Shows whether the sales force had the limitation to allow for accounts within the same region or allow for accounts to be aligned outside of the sales force region.
- **Effective Date**: Indicates the date when the rule is active/valid.
- **End Date**: Indicates the date after which the rule is no longer active/valid.

Note: Click **Rule Version Name** to view the details of the rule version on the **Details** tab and **View** tabs. The **Account Alignments** tab displays a list of accounts aligned to territories by the rule version.

Adjudication Process

The Adjudication process allows the HO user to receive feedback and input from Reps and District Managers for their account and geography alignments. The HO user can configure the Adjudication process for a particular period, decide who to include as participants, and set limits for the change requests that can be submitted by Reps and Managers.

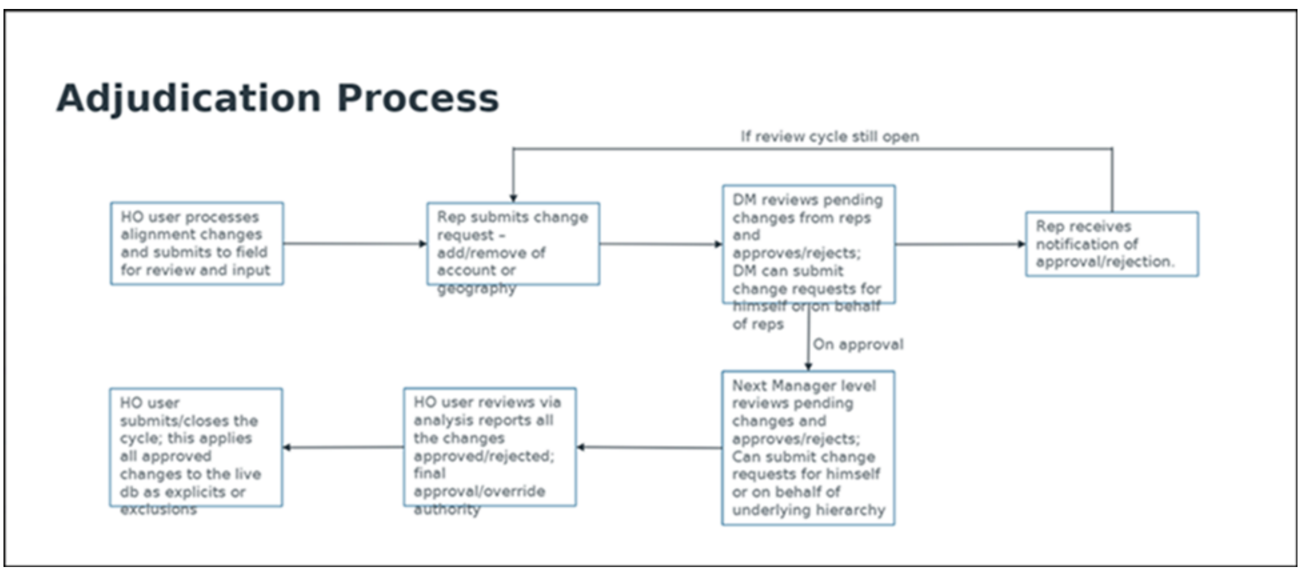
Reps and Managers have access to their account and geography alignments for the HO user-released adjudication cycle. They can provide feedback via Maps or through the tabs in the Adjudications module.

There are two cycle options:

- **Current cycle**: Whatever is currently aligned to user within the effective dates. The field sales users can at any time suggest a change to add/remove accounts or geographies. If approved, the effective date is the date the field user's request is approved.
- **Future cycle**: The HO user creates a specific cycle start and end date and feedback is received and processed within the cycle dates. If approved, the effective date is the date the cycle is committed.

  The HO user defines a specific effective and end date that applies to all the transactions processed within the cycle (it can be multiple parallel cycles for the same or different sales forces without any interaction between them).

Adjudication Process Workflow



Adjudication Workflow for HO Users

As an HO user, you initiate the Adjudication Process by making alignment changes and submitting the changes to a Rep and a District Manager (DM) for review and feedback.

After you receive feedback from the Rep and DM, you submit approved changes and close the cycle. The approved changes are applied as explicits for adds or exclusions for deletes.

See:

- View Adjudications (HO Users)
- Create a New Adjudication
- Release an Adjudication for Review
- Accept the Field's Change Requests
- Discard the Field's Change Requests

View Adjudications (HO Users)

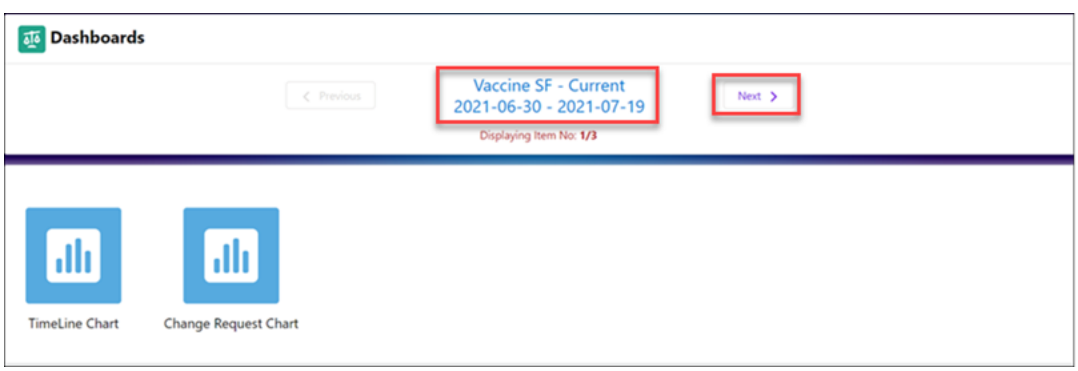
Access **Adjudications** to view current and future adjudication cycles.

Note: Depending on your access level, you might only be able to view current adjudications.

To view an adjudication

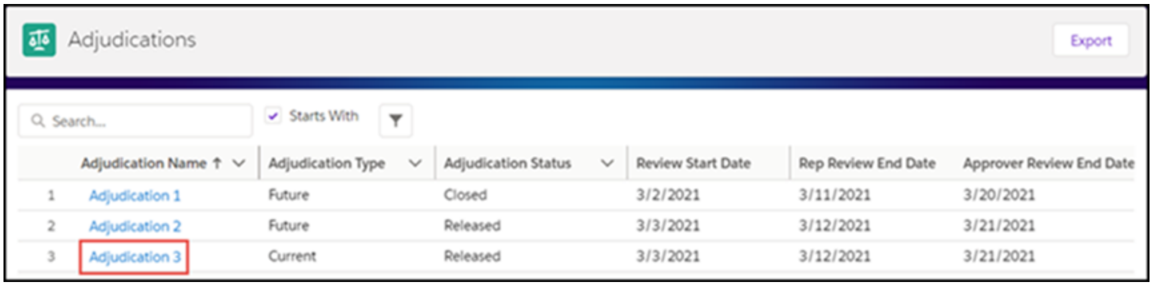
1. Do one of the following:

    - From **Dashboards**, click **Next** until you see the adjudication you would like to view, then click it.



- Click **Adjudications** from the primary navigation bar, then select the adjudication you want to view from the Adjudications screen.

> **Note:** Use the **Search** and **Filters** functions to help you locate the adjudication. See Search and Filter Functions.



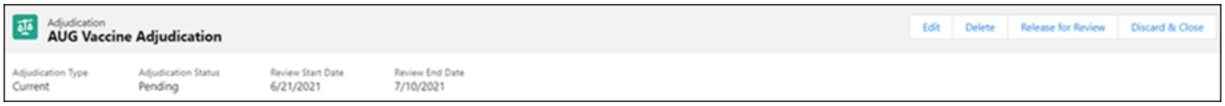
2. View the adjudication information.

The Adjudication Name, actions available for the adjudication, and Adjudication highlight section display on the top of the Adjudication entity page for all the Adjudication tabs.

Actions

- **Edit**: If applicable, click to make modifications to the adjudication information.
- **Delete**: If applicable, click to delete the adjudication. This action is only available for adjudications that have not yet been released for review.
- **Release and Review**: Release and make available the contents to the participants for review and feedback.
- **Accept & Close**: Close the adjudication process, including the approved change requests from the field. This action is not available for adjudications with Auto Apply On Manager Approval.
- **Discard & Close**: Close the adjudication process ignoring the approved change requests from the field. This action is not available for adjudications with Auto Apply On Manager Approval.
- **Close**: Only available for Adjudications with Auto Apply on Manager Approval.

Highlight Section

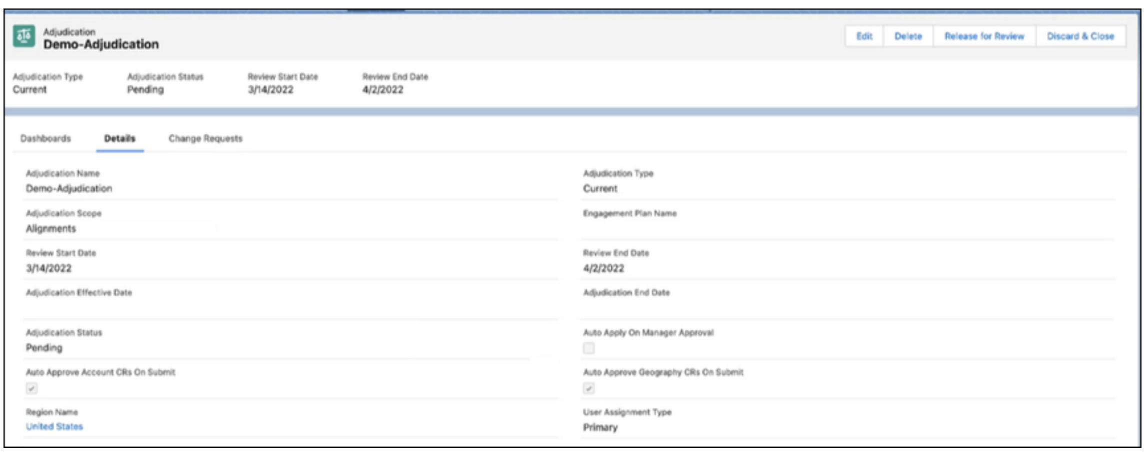


- **Adjudication Name**: Name of the adjudication.
- **Adjudication Type**: *Current* or *Future*.
- **Adjudication Status**: *Pending* or *Released*.
- **Review Start Date**: Indicates the date when the adjudication is submitted to the field for review and feedback.
- **Review End Date**: Indicates the date the review and feedback of the adjudication is due.

Adjudication Details Tab

The **Details** tab contains general information about the adjudication, scenario details, audit information, actions and review periods, participants, guard rails, and warning limits.

General Information



- **Adjudication Name**: Name of the adjudication.
- **Adjudication Type**: *Current* or *Future*.
- **Adjudication Scope**: Indicates whether the adjudication includes alignments, engagement plan, or both.
- **Engagement Plan**: Indicates the engagement plan associated with this adjudication.
- **Review Start Date**: Indicates the date when the adjudication is submitted to the field for review and feedback.

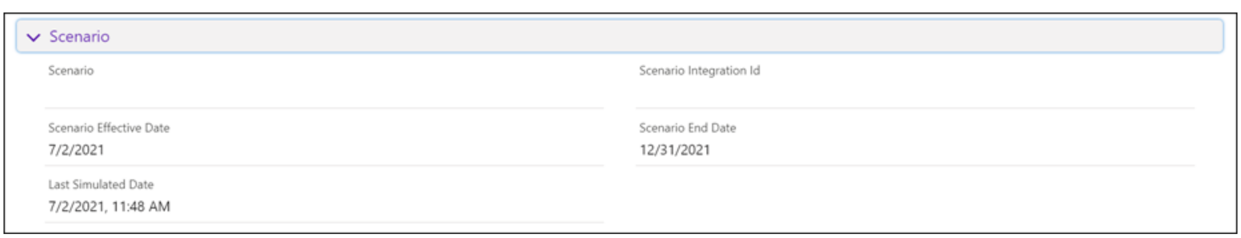
- **Review End Date**: Indicates the date the review and feedback of the adjudication is due.
- **Adjudication Effective Date**: Indicates the date when the adjudication is active/valid. This date must be the same as the review start date.
- **Adjudication End Date**: Indicates the date after which the adjudication is no longer active/valid.
- **Adjudication Status**: *Pending* or *Released*.
- **Auto Apply On Manager Approval**: If *Current* is selected as the adjudication type, selecting this option automatically applies changes after the manager approves rather than waiting until the end of the adjudication period.

  > **Note:** When **Auto Apply On Manager Approval** is selected, the adjudication effective date is the date the change request is approved by the manager.

- **Auto Approve Account CRs On Submit**: Use this option to automatically approve account change requests without waiting for manager approval or for the review period to end. After the adjudication is released, this field cannot be edited.
- **Auto Approve Geography CRs On Submit**: Use this option to automatically approve geography change requests without waiting for manager approval or for the review period to end. After the adjudication is released, this field cannot be edited.
- **Region**: The region the adjudication is aligned to.
- **User Assignment Type**: The user assignment type, such as *Primary* or *Secondary*.

Scenario

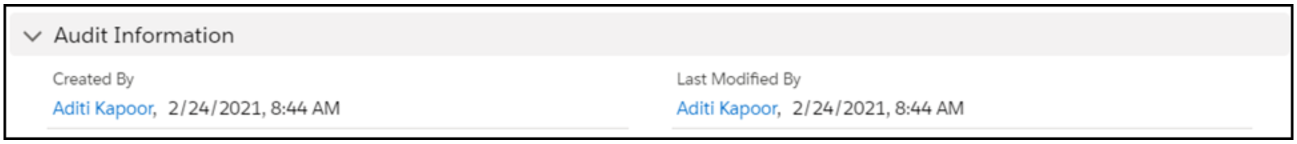
> **Note:** There can be only one scenario linked to an adjudication and only one adjudication linked to a scenario.



- **Scenario**: Name of the scenario linked to adjudication.
- **Scenario Integration ID**: Unique identification number of the scenario.

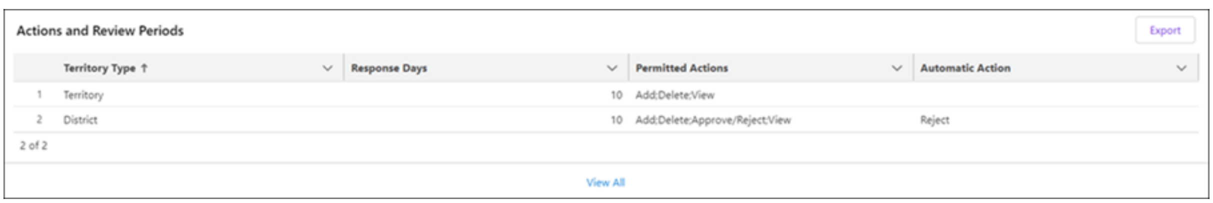
- **Scenario Effective Date**: Indicates the date when the transactions within the scenario are active/valid.
- **Scenario End Date**: Indicates the date after which the transactions within the scenario are no longer active/valid.
- **Last Simulated Date**: Indicates the date the scenario was last simulated.

Audit Information



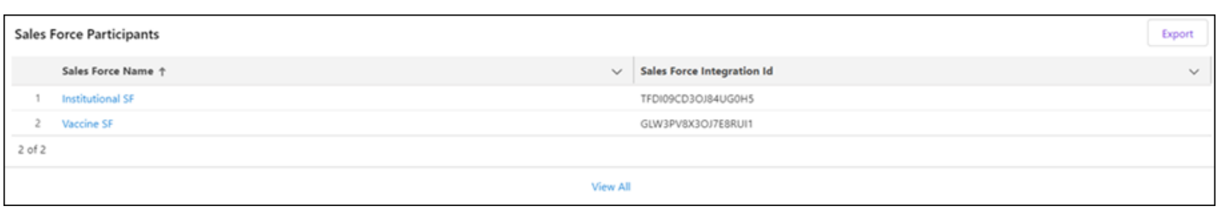
- **Created By**: A combination of the creator's user name and the date/time the adjudication was created.
- **Last Modified By**: A combination of the user name of the last person to edit the adjudication and the date/time it was updated.

Actions and Review Periods



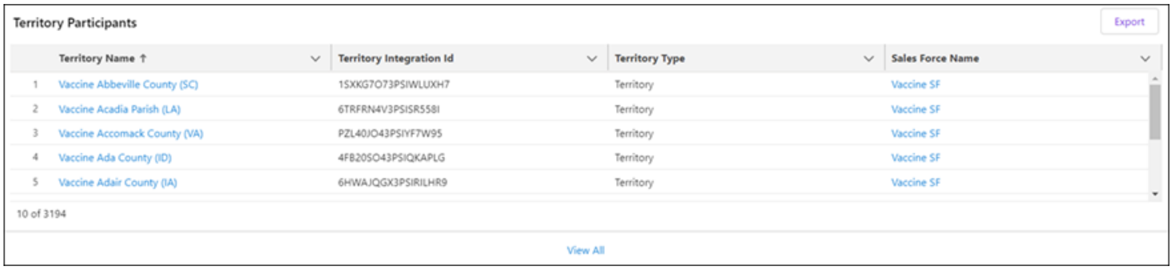
- **Territory Type**: Type of territory, such as *Territory*, *District*, *Region*, *Area*, or *Business Unit*.
- **Response Days**: The number of days in the review cycle for the Territory and District.
- **Permitted Actions**: The actions allowed for the Territory and District, such as *Add*, *Approve/Reject*, *Delete*, and *View*.
- **Automatic Actions**: If applicable, *Approve* or *Reject*, depending on which option was selected.

Sales Force Participants



- **Sales Force Name**: The name of the sales force the territory is aligned to.
- **Sales Force Integration Id**: Unique sales force identification number.

Territory Participants



Territory Participants

Export

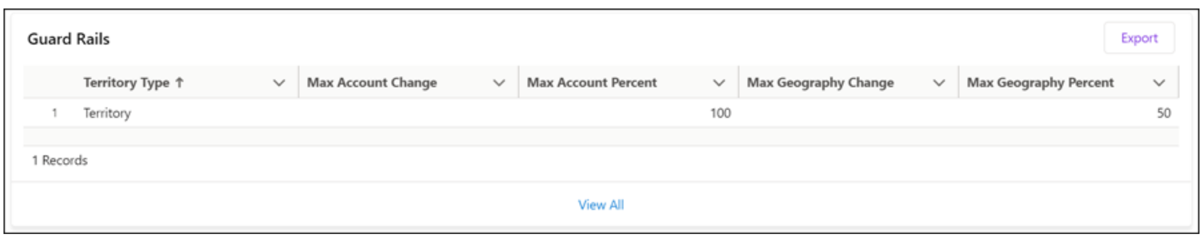
	Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name
1	Vaccine Abbeville County (SC)	1SXKG7O73PSIWLUXH7	Territory	Vaccine SF
2	Vaccine Acadia Parish (LA)	6TRFRN4V3PSISR558I	Territory	Vaccine SF
3	Vaccine Accomack County (VA)	PZL40JO43PSIYF7W95	Territory	Vaccine SF
4	Vaccine Ada County (ID)	4FB20SO43PSIQKAPLG	Territory	Vaccine SF
5	Vaccine Adair County (IA)	6HWAJQGX3PSIRILHR9	Territory	Vaccine SF

10 of 3194

View All

- **Territory Name**: The name of the territory.
- **Territory Integration ID**: Unique territory identification number.
- **Territory Type**: The type of territory the participant is assigned to, such as, Territory, District, Region, Business Unit, etc.
- **Sales Force Name**: The name of the sales force the territory is aligned to.

Guard Rails



Guard Rails

Export

	Territory Type ↑	Max Account Change	Max Account Percent	Max Geography Change	Max Geography Percent
1	Territory		100		50

1 Records

View All

- **Territory Type**: The type of territory (or hierarchy level of territory) the guard rails are assigned to, such as, Territory, District, Area, Business Unit, etc.
- **Max Account Change**: The maximum number of account changes the field rep can make to their account alignments.
- **Max Account Percent**: The maximum percentage of account changes the field rep can make to their account alignments.
- **Max Geography Change**: The maximum number of geography changes the field rep can make to their geography alignments.

- **Max Geography Percent**: The maximum percentage of geography changes the field rep can make to their geography alignments.

Warning Limits

Warning Limits

Export

	Territory Type ↑	First Warning	Second Warning
1	Territory	5	2
2	District	5	2

2 Records

View All

- **Territory Type**: The type of territory (or hierarchy level of territory) the guard rails are assigned to, such as, Territory, District, Area, Business Unit, etc.
- **First Warning**: The number of days prior to the review period end the field rep is notified of non-action.
- **Second Warning**: The number of days prior to the review period end the field rep is notified of non-action.

Regions

Regions

Export

	Region Name ↑	Region Integration Id
1	US	10002000000107

1 of 1

View All

- **Region Name**: The name of the region.
- **Region Integration Id**: Unique region identification number.

Change Requests Tab

This tab contains the account and geography change requests made by the Rep and District Manager.

Account Change Requests

Account Change Requests

Export

Search... Starts With

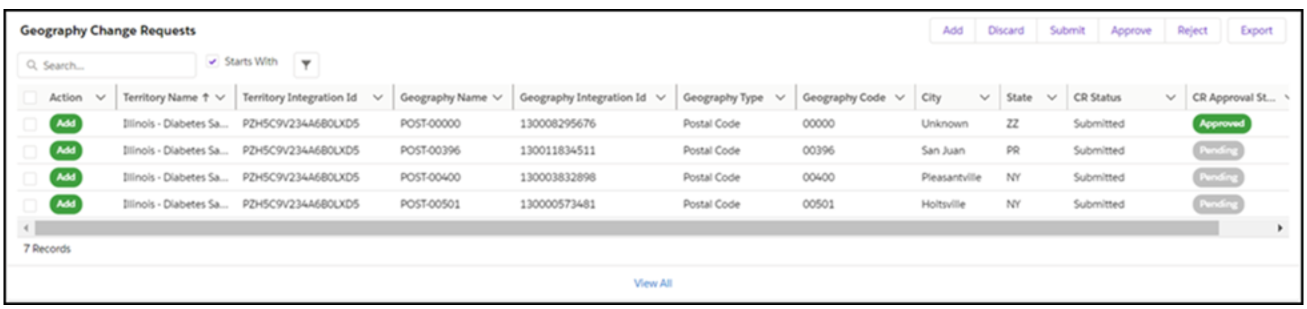
Action	Territory Name ↑	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Segment	Call Frequency	Account Address	CR Status	CR Approval Sta... ↑
Delete	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	Aaron Hupman	WUSM00245039	Medical Professional	Family medicine			ANNISTON AL 36207, LILBUR...	Pending	
Update	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	Aashish Patel	WUSM01031433	Medical Professional	Neurology	Gold	Face to Face 10 [12]	GREENVALE NY 11548, NEW ...	Pending	
Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	Adam Karp	WUSM03902403	Medical Professional	Neurology			FOREST HILLS NY 11375, NEW...	Pending	

4 Records

View All

- **Action**: *Add* or *Delete*. *Update* appears only for engagement plans and applies to updates to **Segment** and **Call Frequency**.
- **Territory Name**: Name of the territory the account is aligned to.
- **Territory Integration ID**: Unique territory identification number.
- **Account Name**: Name of the account that is part of the change request.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Area of expertise.
- **Segment**: The hierarchy of the account (Gold, High, Low, etc.) Displays the original and updated values.
- **Call Frequency**: The method used to contact the account and the number of times the account is contacted. Displays the original and updated values.
- **Account Address**: Address of the account.
- **CR Status**: *Pending* or *Submitted*.
- **CR Approval Status**: *Pending*, *Approved*, or *Rejected*.
- **CR Details**: Click the drop-down for a specific territory and select **CR Details** to view change request details.

Geography Change Requests



Action	Territory Name	Territory Integration Id	Geography Name	Geography Integration Id	Geography Type	Geography Code	City	State	CR Status	CR Approval St...
Add	Illinois - Diabetes Sa...	PZH5C9V234A6B0LXD5	POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	Submitted	Approved
Add	Illinois - Diabetes Sa...	PZH5C9V234A6B0LXD5	POST-00396	130011834511	Postal Code	00396	San Juan	PR	Submitted	Pending
Add	Illinois - Diabetes Sa...	PZH5C9V234A6B0LXD5	POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	Submitted	Pending
Add	Illinois - Diabetes Sa...	PZH5C9V234A6B0LXD5	POST-00501	130000573481	Postal Code	00501	Holtsville	NY	Submitted	Pending

- **Action**: *Add* or *Delete*.
- **Territory Name**: Name of the territory the geography is aligned to.

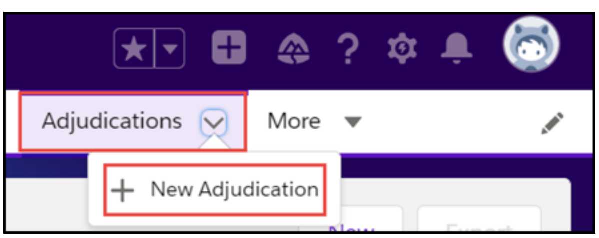
- **Territory Integration ID**: Unique territory identification number.
- **Geography Name**: Name of the geography that is part of the change request.
- **Geography Integration ID**: Unique geography identification number.
- **Geography Type**: The type or level of geography, such as postal code, brick, or micro brick.
- **Geography Code**: The code or ID for the specific geography, such as postal code 10001 for New York City.
- **City** and **State**: Specify location information for the geography.
- **CR Status**: *Pending* or *Submitted*.
- **CR Approval Status**: *Pending* , *Approved*, or *Rejected*.
- **CR Details**: Click the drop-down for a specific territory and select **CR Details** to view change request details.

Create a New Adjudication

Adjudications are created by HO users.

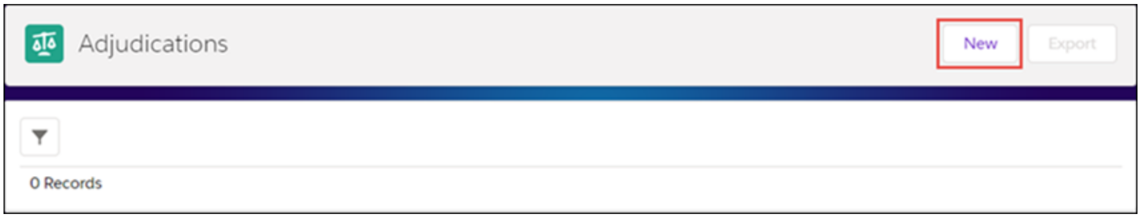
To create an adjudication

1. Do one of the following:
    - Click the **Adjudications** drop-down from the primary navigation bar and select **+ New Adjudication**.

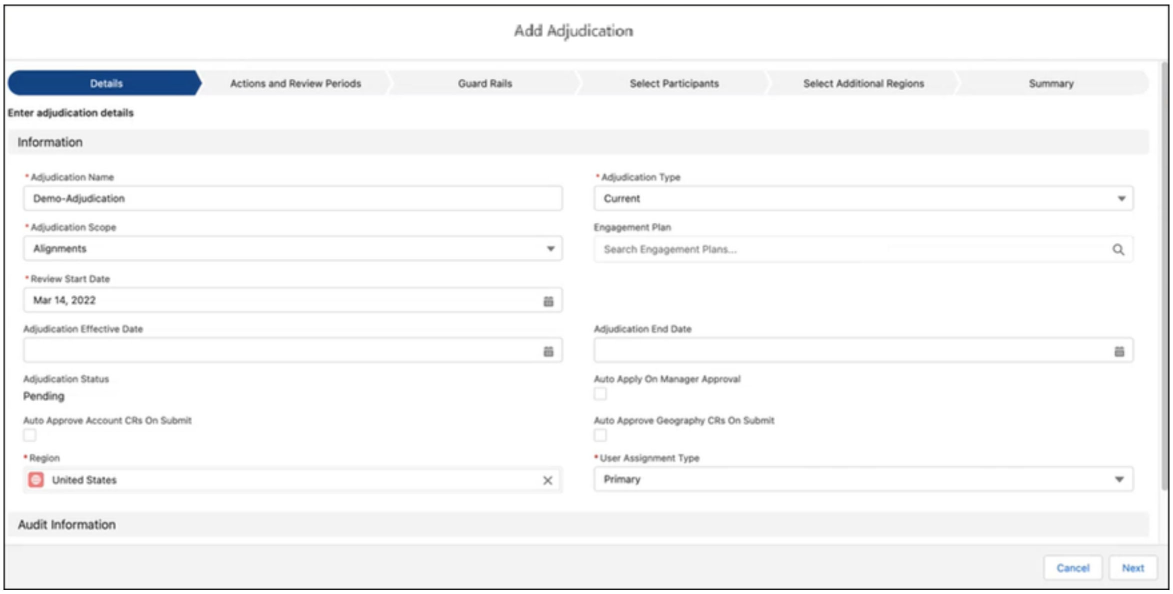
      

    - Click **Adjudications** from the primary navigation bar and select **New** from the

Adjudications screen.



2. Enter adjudication details, then click **Next**.



- **Adjudication Name**: Enter a name for the adjudication.

> **Note:** A participant can have only one current adjudication active at a given time. For example, if you already have a current adjudication for Sales Force Oncology, you can't create another current adjudication that has that Sales Force in it. You also can't create another current adjudication that has territories from that Sales Force.
>
> Similarly, if you already have a current adjudication for TerritoryDelawareDiabetesSales, you can't add a new current adjudication for that territory, and you can't add a new current adjudication that has Sales Force Diabetes Sales in it.

- **Adjudication Type**: *Current* or *Future*.

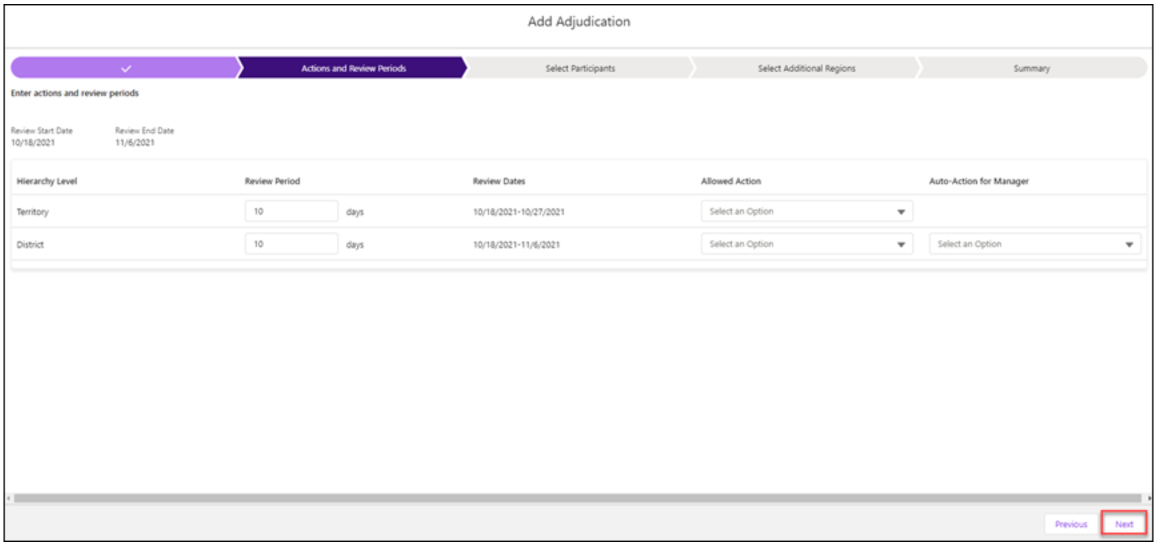
- **Adjudication Scope**: Indicates if the adjudication includes *Alignments*, *Engagement Plan*, or *Alignments+Engagement Plan*.
  - **Alignments**: Reps can add accounts and/or geographies in or out, but cannot change the frequency of calls or the account segment.
  - **Engagement Plan**: Reps cannot add accounts and/or geographies in or out, but can change the frequency of calls or the account segment.
  - **Alignments+Engagement Plan**: Reps can add accounts and/or geographies in or out and can change the frequency of calls or the account segment.
- **Engagement Plan**: Indicates the engagement plan associated with the adjudication.
- **Review Start Date**: Indicates the date when the adjudication is submitted to the field for review and feedback.
- **Adjudication Effective Date**: Indicates the date when the adjudication is active/valid. This date must be the same as the review start date.

> **Note:** If the adjudication includes an engagement plan, ensure that the effective date is not outside the range of the engagement plan effective date.
>
> When **Auto Apply On Manager Approval** is selected, the adjudication effective date is the date the change request is approved by the manager.

- **Adjudication End Date**: Indicates the date after which the adjudication is no longer active/valid.
- **Adjudication Status**: Read-only; *Pending*.
- **Auto Apply On Manager Approval**: If *Current* is selected as the adjudication type, select this option to automatically apply changes after the manager approves rather than waiting until the end of the adjudication period.
- **Auto Approve Account CRs On Submit**: Select to automatically approve account change requests without waiting for manager approval or for the review period to end. After the adjudication is released, this field cannot be edited.
- **Auto Approve Geography CRs On Submit**: Select to automatically approve geography change requests without waiting for manager approval or for the review period to end. After the adjudication is released, this field cannot be edited.

- **Region**: The region the adjudication is aligned to.
- **User Assignment Type**: Select a specific user assignment type (such as *Primary*, *Secondary*, etc.) to filter the result set to include user assignments of the selected type only.

3. Enter actions and review periods, then click **Next**.



- **Hierarchy Level**: Read-only; Territory (field rep) and District (manager).
- **Review Period (days)**: Enter the number of days in the review cycle for the Territory and District.

> **Note:** The district manager has access to the adjudication starting on the same day as the field rep, but the manager will have an additional 10 days from the field rep's end date to review the adjudication.

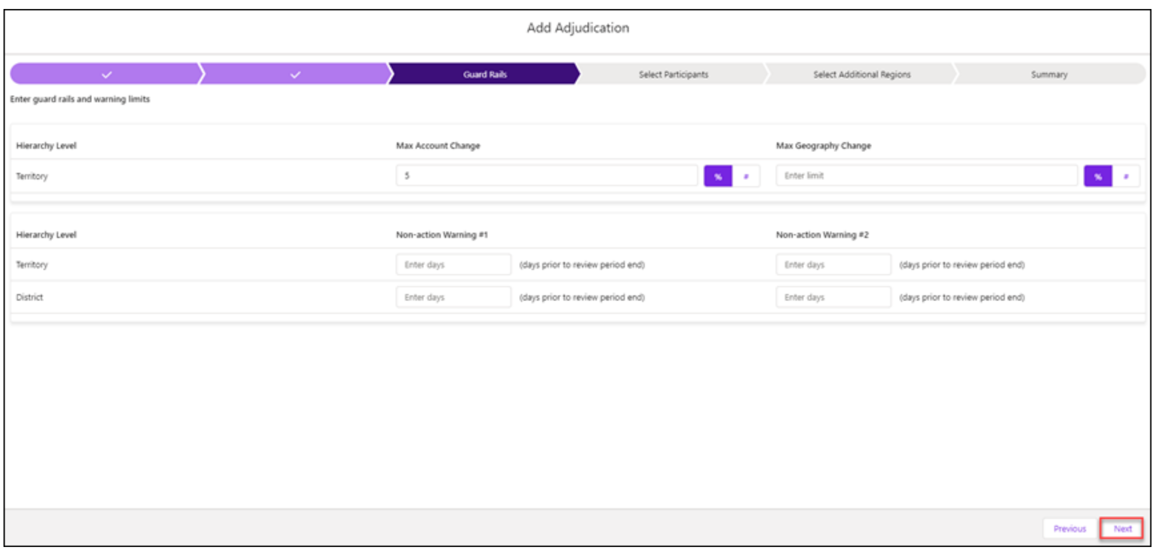
- **Allowed Action**: Select the actions allowed for the Rep or DM, including *Add, Delete, View, Update Call Frequency, Update Segment,* and *Accept/Reject* (District only).

> **Note:** The available values for **Allowed Action** are dependent on how these fields are answered on the **Details** tab:
>
> - **Adjudication Scope**
> - **Auto Approve Account CRs on Submit** (affects district hierarchy level only)
> - **Auto Approve Geography CRs on Submit** (affects district hierarchy level only)

- **Auto-Action for Manager**: Select the default action if there is no action by the District Manager. Select *Approve* to automatically approve the field rep's changes or *Reject* to automatically reject the changes.

4. Enter the guard rails to indicate how many times a Rep can make changes to the account. Enter the warning limits to define when the system displays a warning message that alerts the District Manager or Rep of non-action. Click **Next**.

> **Note:** This step is not available when the **Allowed Action** drop down for *Territory* on the previous Actions and Review Periods screen is set to *View Only.*



- **Hierarchy Level**: Read-only; Territory (Rep) and District (District Manager).
- **Max Account Change**: Enter the maximum limit (as a percentage % or a finite number #) for the account change requests.

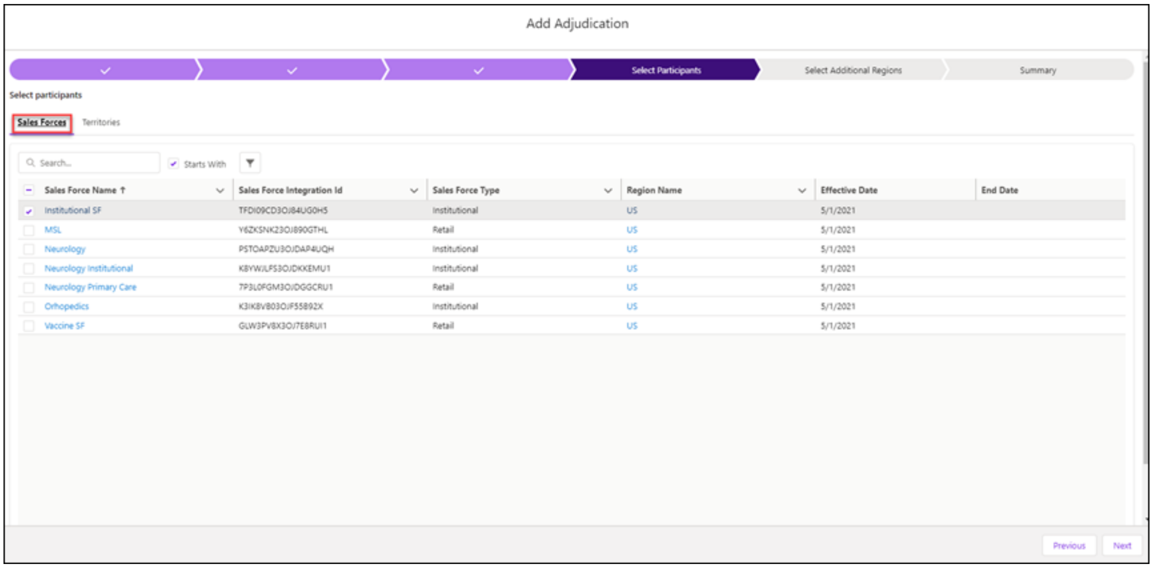
- **Max Geography Change)**: Enter the maximum limit (as a percentage or a finite number) for the geography change requests.
- **Hierarchy Level**: Read-only; Territory (field rep) and District (manager).
- **Non-Action Warning #1**: Enter the number of days prior to the review period end you want to notify the District Manager/Rep of non-action. If you don't want to display a first warning, enter **0**.
- **Non-Action Warning #2**: Enter the number of days prior to the review period end you want to notify the District Manager/Rep of non-action. If you don't want to display a second warning, enter **0**.

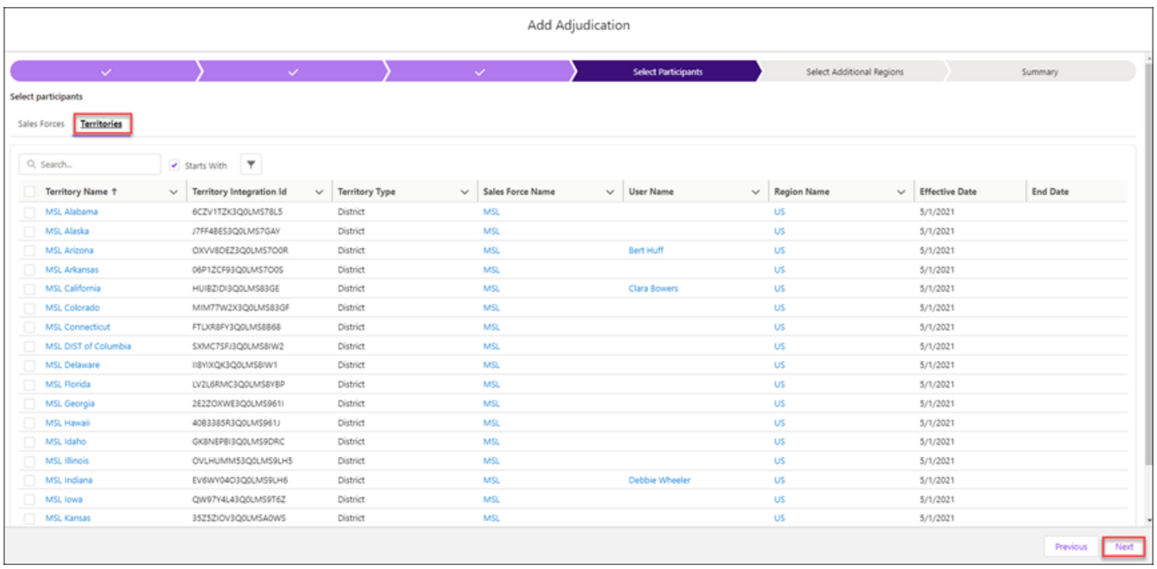
Note: A warning message displays:

- For the field rep when no change requests have been created for an adjudication for which the rep has *Add* or *Delete* access.
- For a district manager who has not approved/rejected a change request *or* created a change request for an adjudication that is open for manager feedback (for which the manager has *Approve/Reject* and/or *Add/Delete* access).

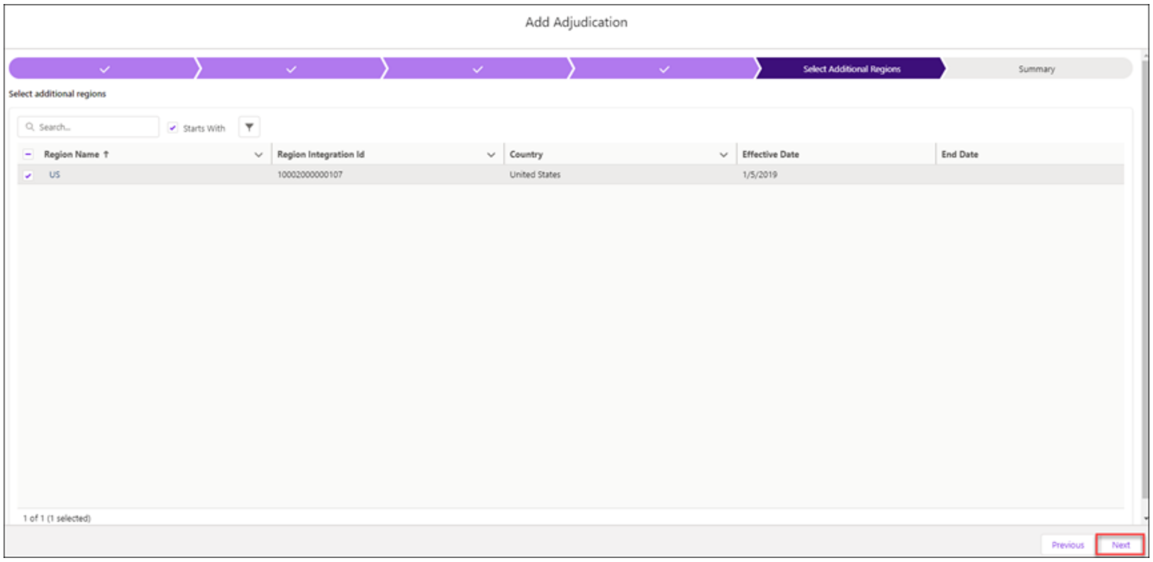
5. Select the check box(es) beside participant(s) you want to include in the adjudication and click **Next**. Use the **Sales Forces** tab to select sales force participants and the **Territories** tab to add additional participants.

Note: If you try to add participants or territories that violate the rule against having only one current adjudication active at a given time, you will receive an error message.

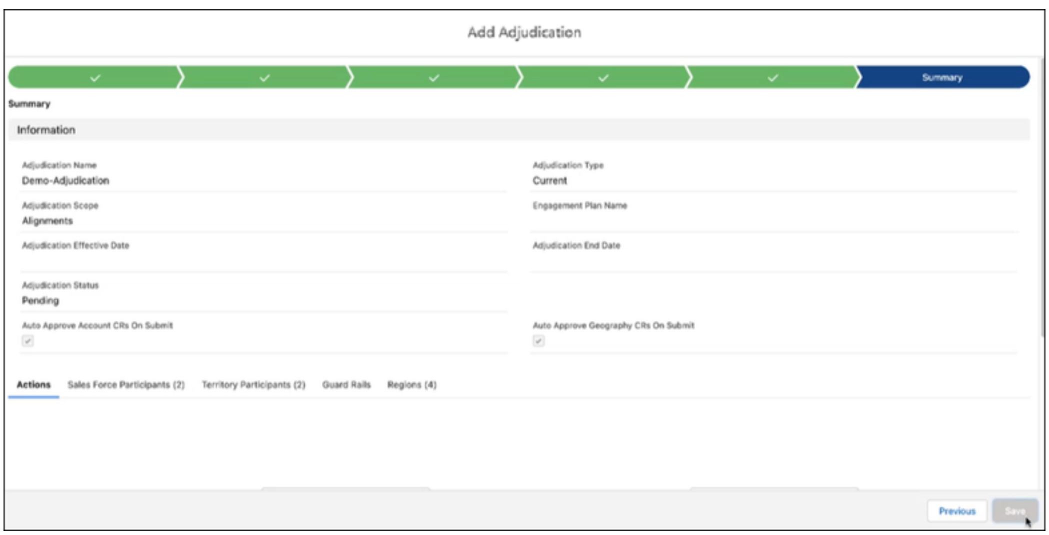

Add Adjudication
Select Participants
Select Additional Regions
Summary
Select participants
Sales Forces
Territories
Starts With
Sales Force Name
Sales Force Integration Id
Sales Force Type
Region Name
Effective Date
End Date
Previous
Next


Add Adjudication
Select Participants
Select Additional Regions
Summary
Select participants
Sales Forces
Territories
Starts With
Territory Name
Territory Integration Id
Territory Type
Sales Force Name
User Name
Region Name
Effective Date
End Date
Previous
Next

6. Select the check box next to the additional region you want to add to the to the adjudication, if applicable, and click **Next**.



7. Review the information you added to the adjudication using the tabs highlighted on the screen below, then click **Save**.



Note: If you want to make changes before saving:

1. Click **Previous** until you get to the appropriate screen.
2. Make the changes.
3. Click **Next** until you get to the Summary screen.
4. Click **Save**.

The adjudication is created.

See Release an Adjudication for Review for information on releasing the adjudication to the field rep for review.

Release an Adjudication for Review

After you set up an adjudication, you can release it to the field for review.

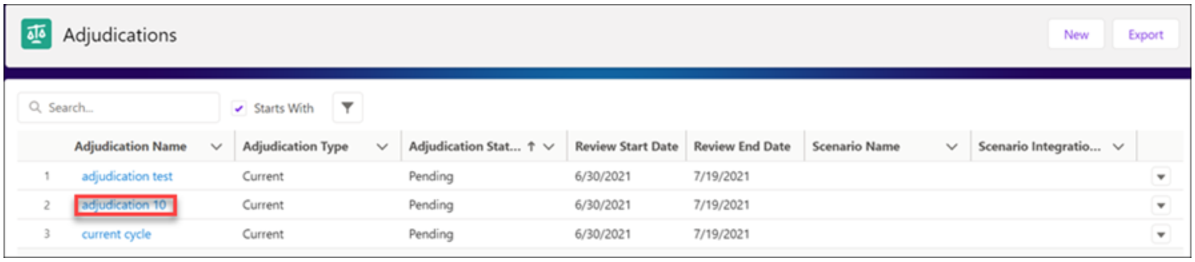
Note: You can make edits to the adjudication after you release it for review.

Note:

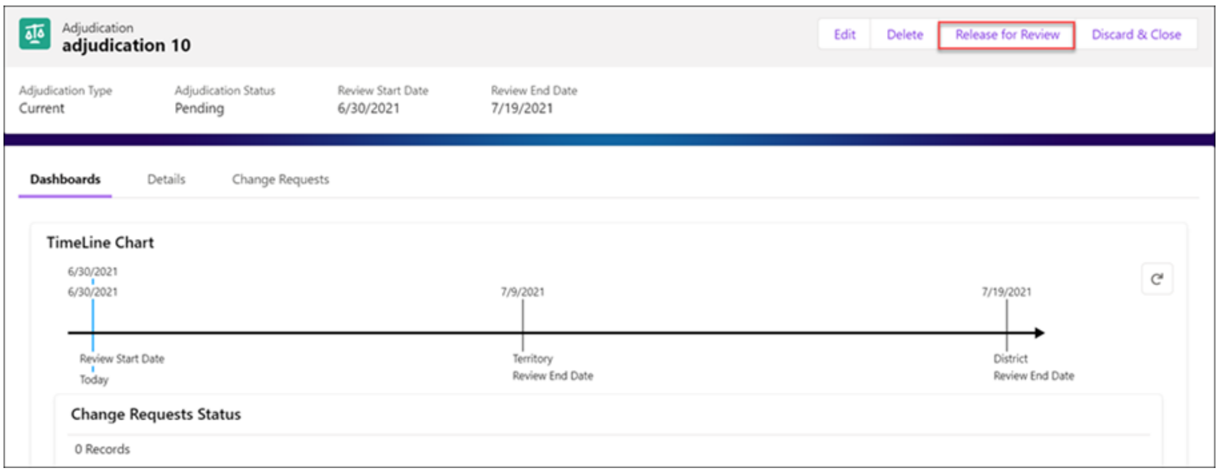
- If a user is *assigned* to a territory after it is released for review and the territory was included in the participant list, the user will be auto-included and will have access to the adjudication process starting from the date of the user assignment.
- If a user is *unassigned* from a territory after it is released for review and the territory was included in the participant list, the user will have read-only permissions to existing change requests and cannot create change requests for the adjudications process starting from the date of the user unassignment.
- If a manager is *unassigned* from a territory after an adjudication is released for review, the manager cannot approve or reject change requests already submitted to them.

To release an adjudication for review

1. Click the adjudication you would like to release to the field from the Adjudications screen.



2. Click **Release for Review**.

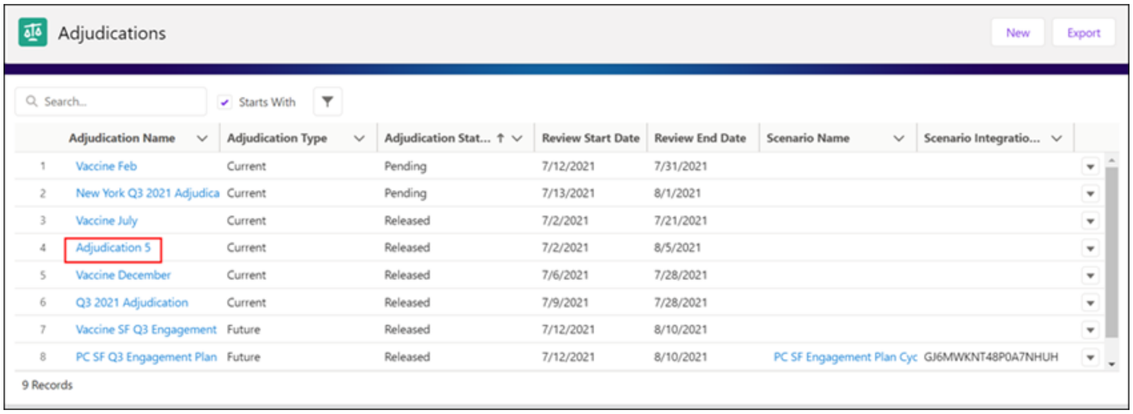


Accept the Field's Change Requests

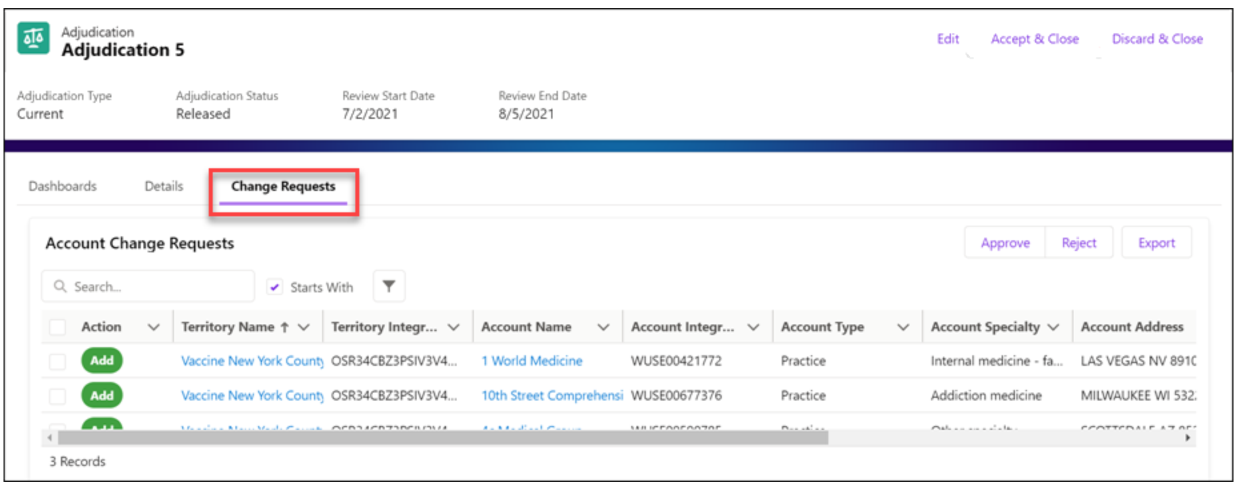
If you want to keep the changes the field made to the adjudication and it is the end of the review period, accept all changes.

To accept the field's change requests

1. Open the adjudication.

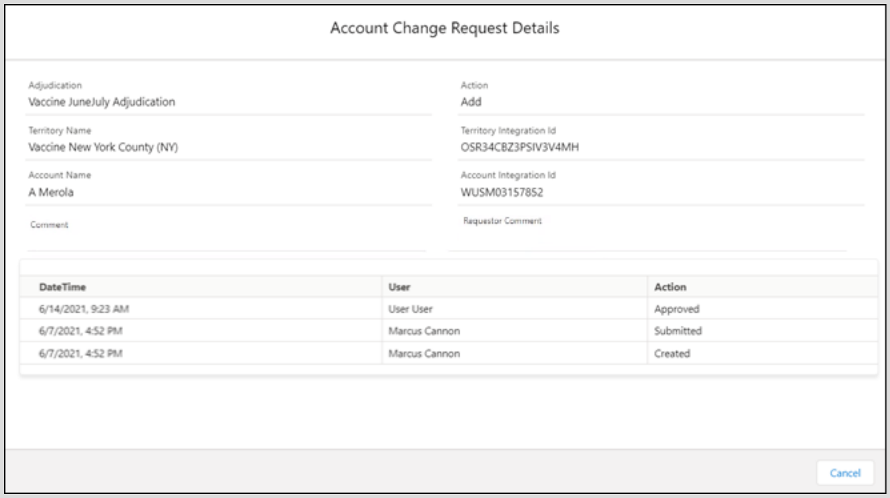


2. Click the **Change Requests** tab.

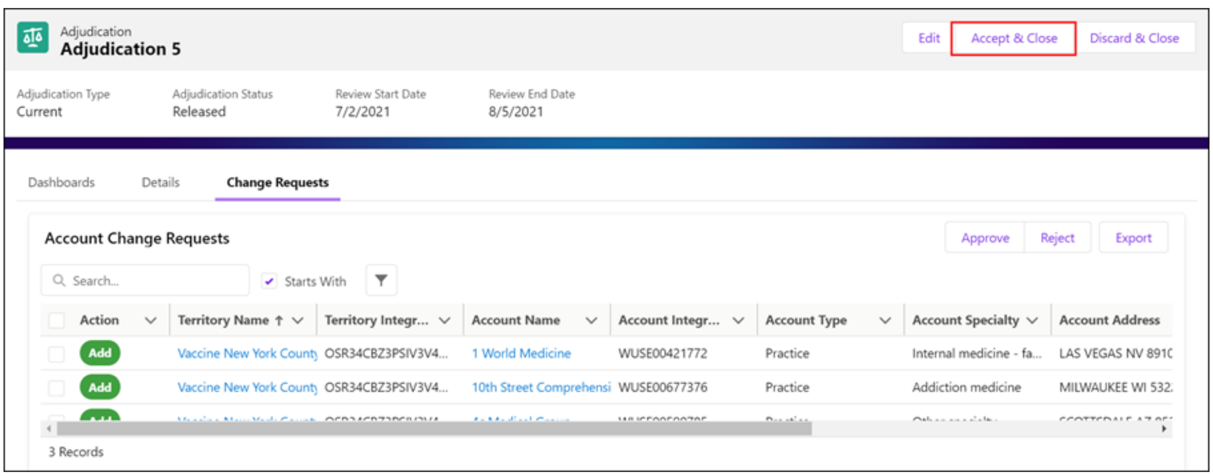


3. Verify the changes.

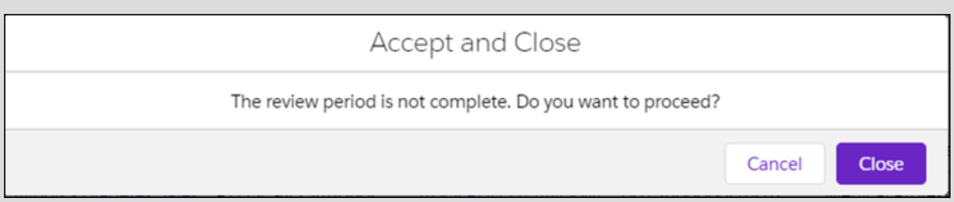
Note: To review details of a specific change request, click the drop-down and select **CR Details**. Click **Cancel** to close the window.



4. Click **Accept & Close** in the header.



Note: If you close the adjudication prior to the completion of review period, you will receive a message that the review period is not complete. Click **Close** to proceed.



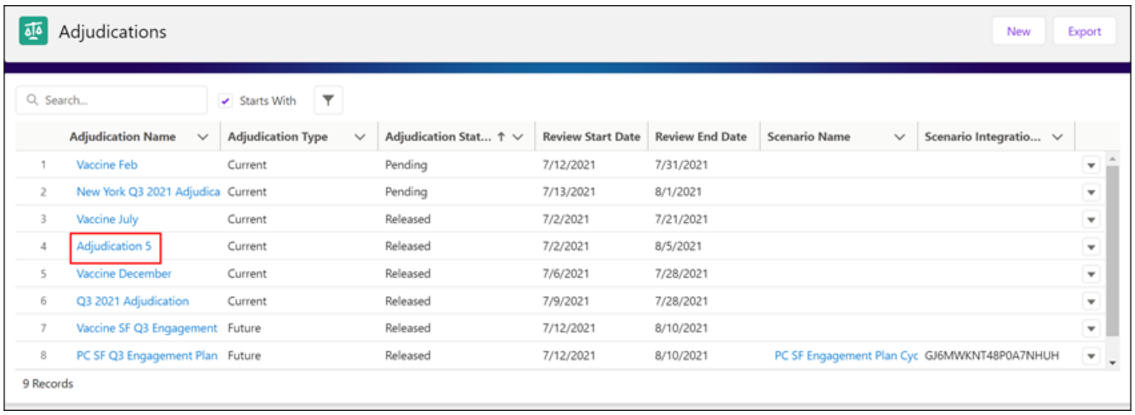
The changes are accepted and the adjudication status changes to *Closed* and is read-only.

Discard the Field's Change Requests

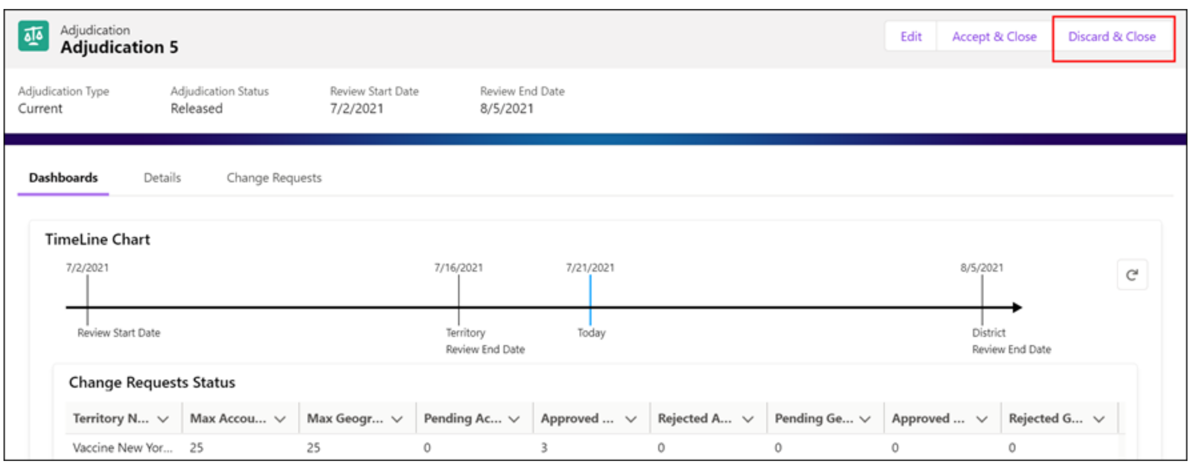
If you want to remove the changes the field made to the adjudication and it is the end of the review period, discard the changes.

To discard the field's change requests

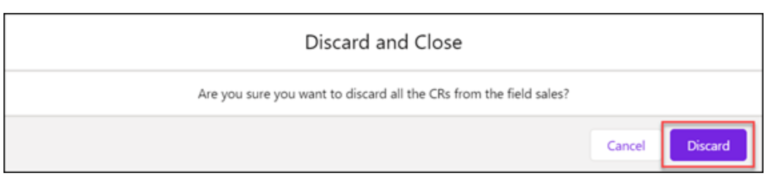
1. Open the adjudication.



2. Click **Discard & Close**.



3. Click **Discard**.



The changes are discarded and the adjudication status is *Closed* and is read-only.

Adjudication Workflow for Reps and District Managers

Reps who are included by the HO user as a participant follow these steps to work with adjudications:

1. Review the current or upcoming account and/or geography alignments.
2. Provide input via change requests to add or remove accounts or geographies.
3. Submit the change request to the District Manager (DM).
4. Receive notification of the DM's approval or rejection of your changes.

District Managers follow these steps to work with adjudications:

1. Review the Rep's pending changes.
2. Approve or reject some or all of the changes.
3. Directly create change requests on behalf of the Rep to add or remove accounts or geographies.
4. Submit the change request to the HO user.

See:

- Rep Dashboard
- District Manager Dashboard
- View Adjudications (Reps, DMs)
- Provide Feedback for an Adjudication (Reps, DMs)

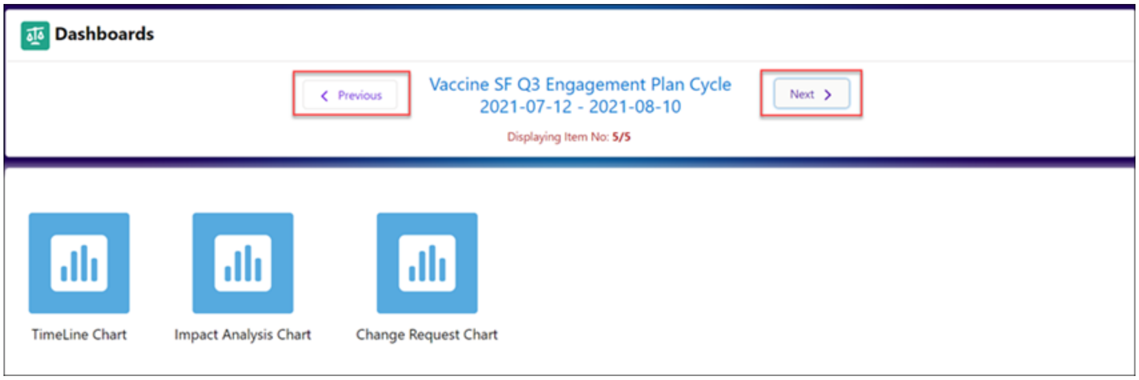
Rep Dashboard

The **Dashboard** tab contains up to three sections:

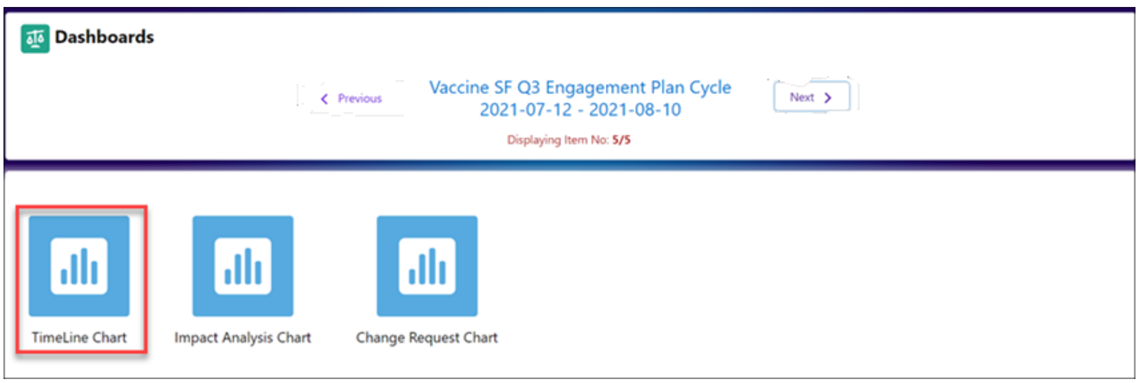
- The **TimeLine Chart** includes a graph of milestone dates of the adjudication, as well as a Change Requests Status grid that provides a quick view of the status of the change requests for your assigned territories.
- The **Impact Analysis Chart** displays an analysis of the contents of an adjudication process for future adjudication types. If the adjudication is not marked as *Future*, this chart will not display.
- The **Change Request Chart** displays change request data for the adjudication.

To view the TimeLine Chart

1. From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.

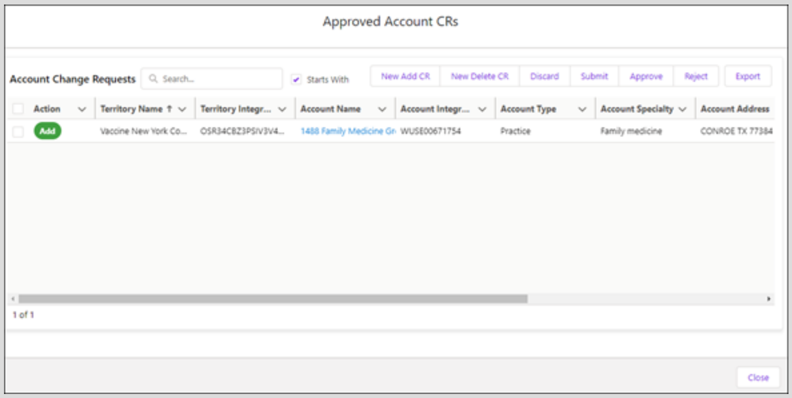


2. Click **TimeLine Chart**  .



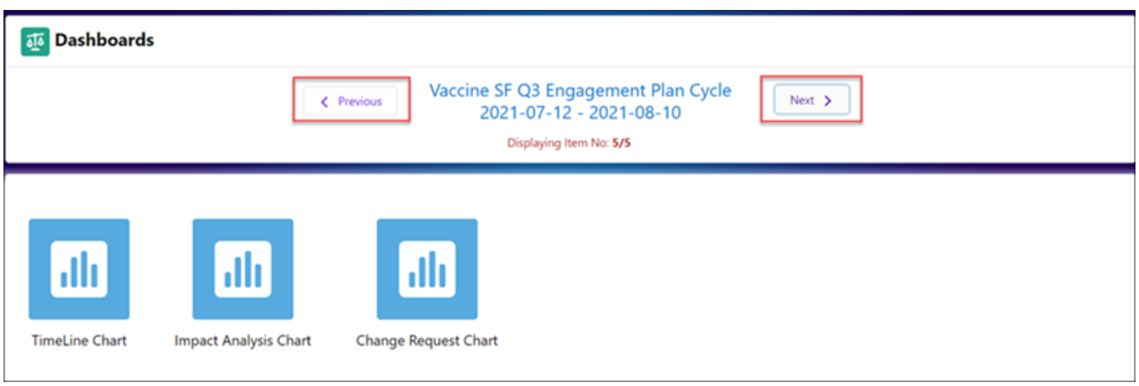
3. View the milestone dates and change requests status.

Note: Click on any change request's number count to open an actionable window for the corresponding type of change request. For example, click a number in the **Approved Account CRs** column (above) for a specific change request to display a window to perform different actions on that request.



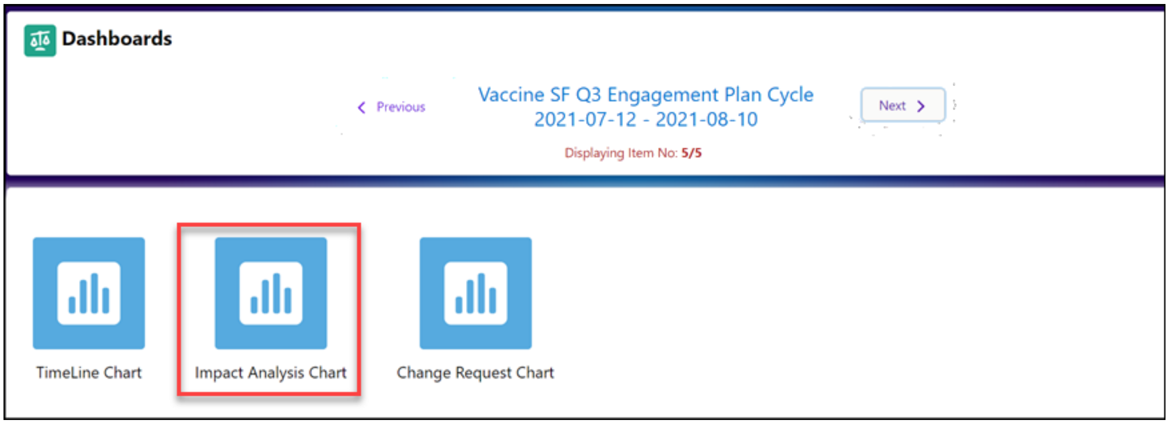
To view the Impact Analysis Chart

1. From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.

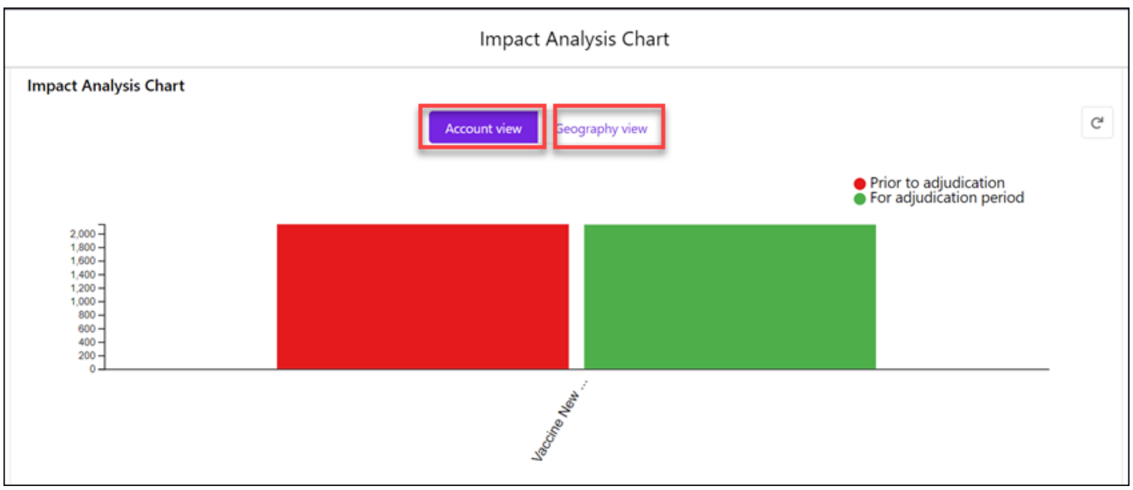


Note: The Impact Analysis Chart only appears for adjudications with *Future* as the Adjudication Type.

2. Click **Impact Analysis Chart** .

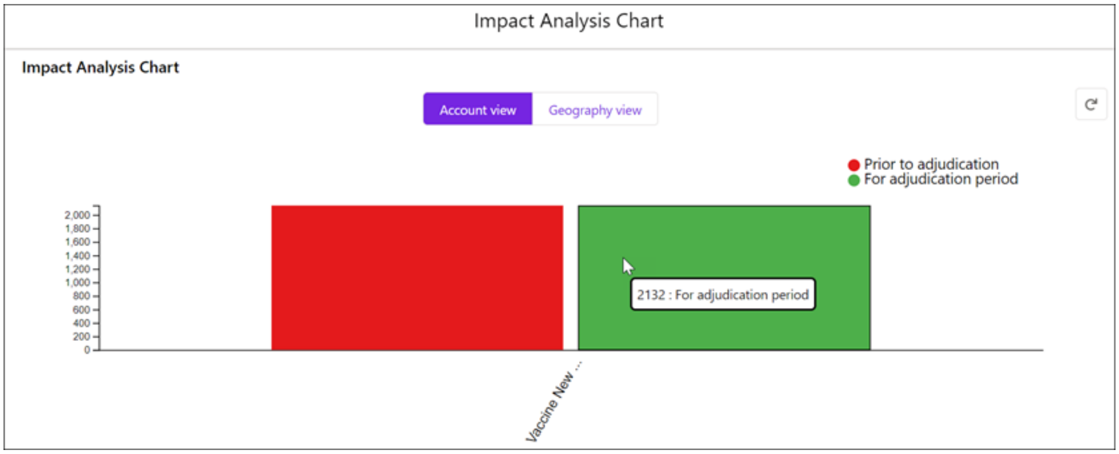


3. Click **Account view** to display account information or **Geography view** to display geography information.

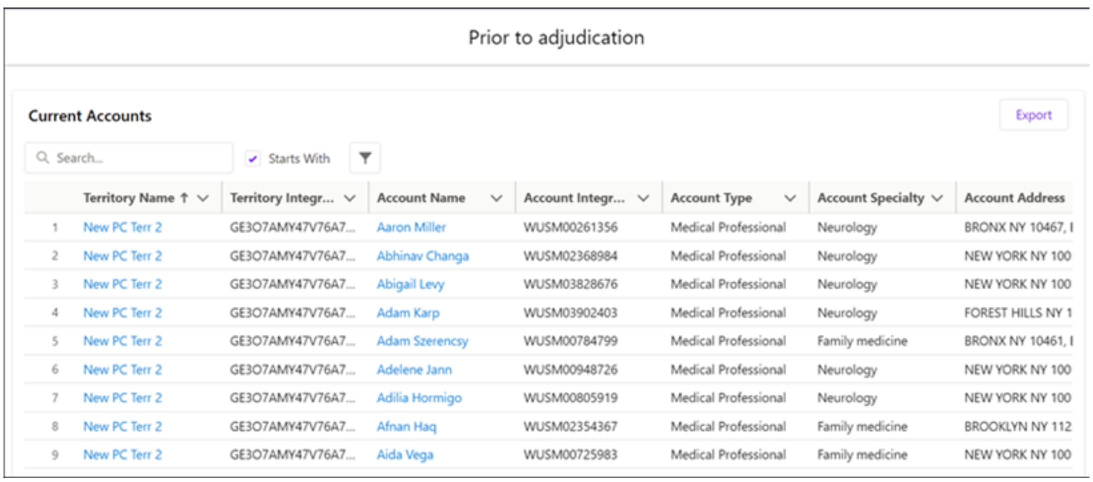


4. For detailed information on data prior to the adjudication (red) and current adjudication period data (green):

- Hover over either of the graph bars to quickly view a popup of the results.



- Click the red *Prior to adjudication* graph bar to display the Prior to adjudication screen.



Prior to adjudication

Current Accounts

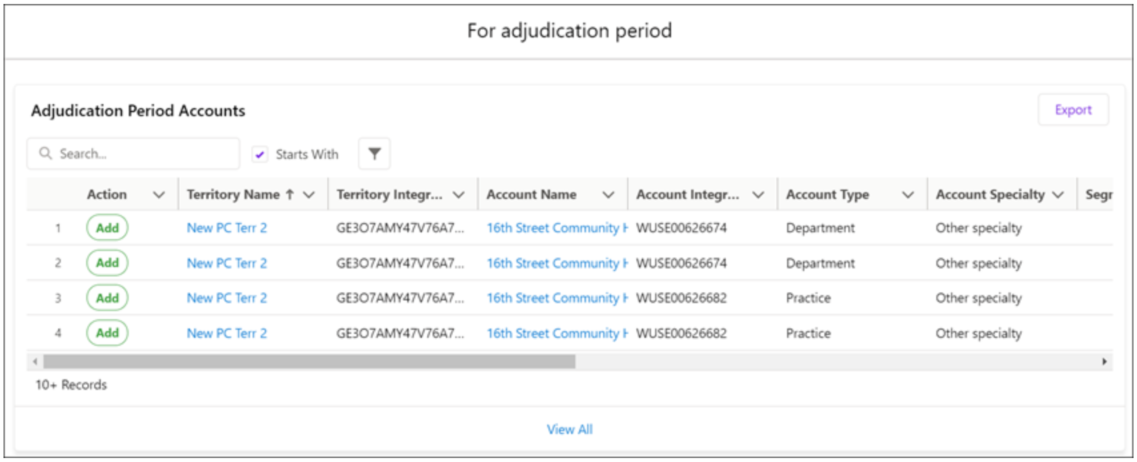
Export

Search...

Starts With

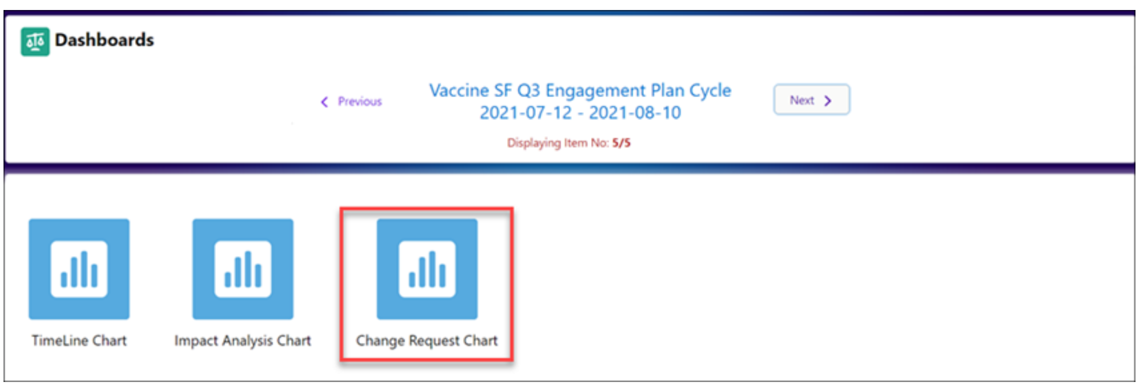
	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Address
1	New PC Terr 2	GE3O7AMY47V76A7...	Aaron Miller	WUSM00261356	Medical Professional	Neurology	BRONX NY 10467, I
2	New PC Terr 2	GE3O7AMY47V76A7...	Abhinav Changa	WUSM02368984	Medical Professional	Neurology	NEW YORK NY 100
3	New PC Terr 2	GE3O7AMY47V76A7...	Abigail Levy	WUSM03828676	Medical Professional	Neurology	NEW YORK NY 100
4	New PC Terr 2	GE3O7AMY47V76A7...	Adam Karp	WUSM03902403	Medical Professional	Neurology	FOREST HILLS NY 1
5	New PC Terr 2	GE3O7AMY47V76A7...	Adam Szerencsy	WUSM00784799	Medical Professional	Family medicine	BRONX NY 10461, I
6	New PC Terr 2	GE3O7AMY47V76A7...	Adelene Jann	WUSM00948726	Medical Professional	Neurology	NEW YORK NY 100
7	New PC Terr 2	GE3O7AMY47V76A7...	Adilia Hormigo	WUSM00805919	Medical Professional	Neurology	NEW YORK NY 100
8	New PC Terr 2	GE3O7AMY47V76A7...	Afnan Haq	WUSM02354367	Medical Professional	Family medicine	BROOKLYN NY 112
9	New PC Terr 2	GE3O7AMY47V76A7...	Aida Vega	WUSM00725983	Medical Professional	Family medicine	NEW YORK NY 100

- Click the green *For adjudication period* graph bar to display the For adjudication period screen.

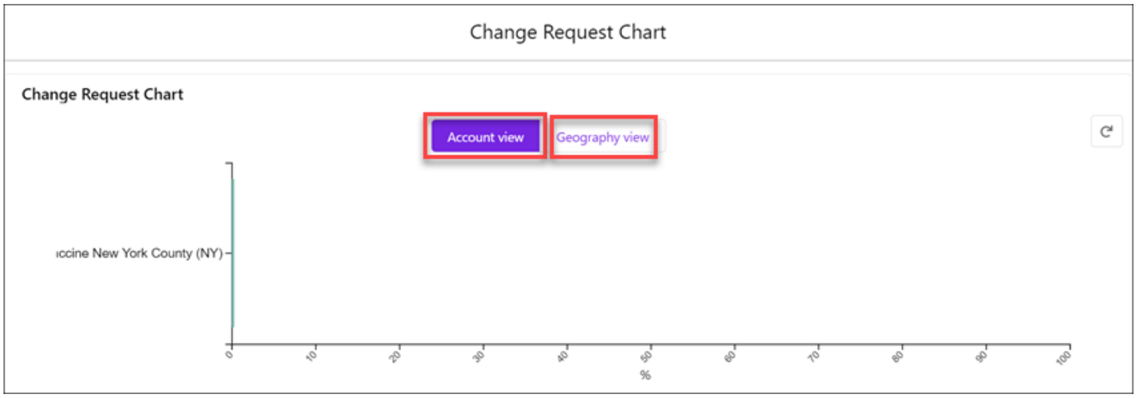


To view the Change Request Chart

1. From the Dashboards tab, click **Previous** or **Next** until you find the adjudication you would like to view.
2. Click **Change Request Chart**  .

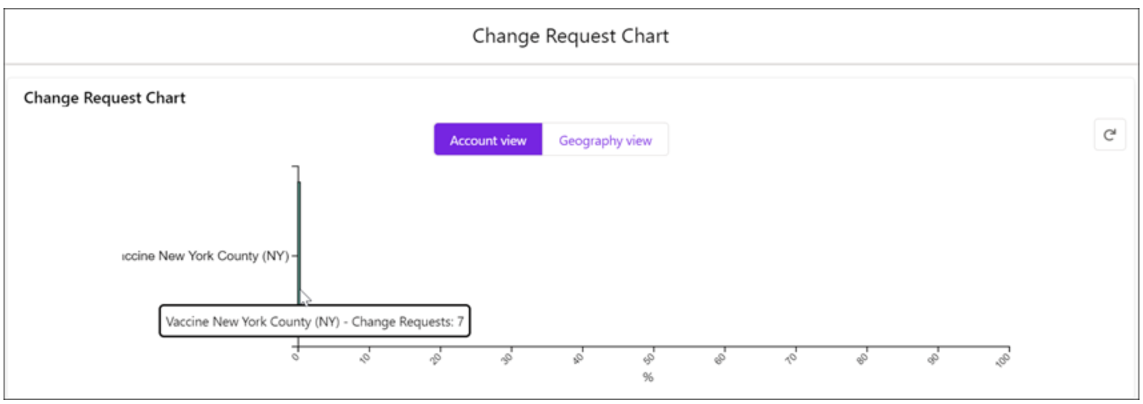


3. Click **Account view** to display account information or **Geography view** to display geography information.

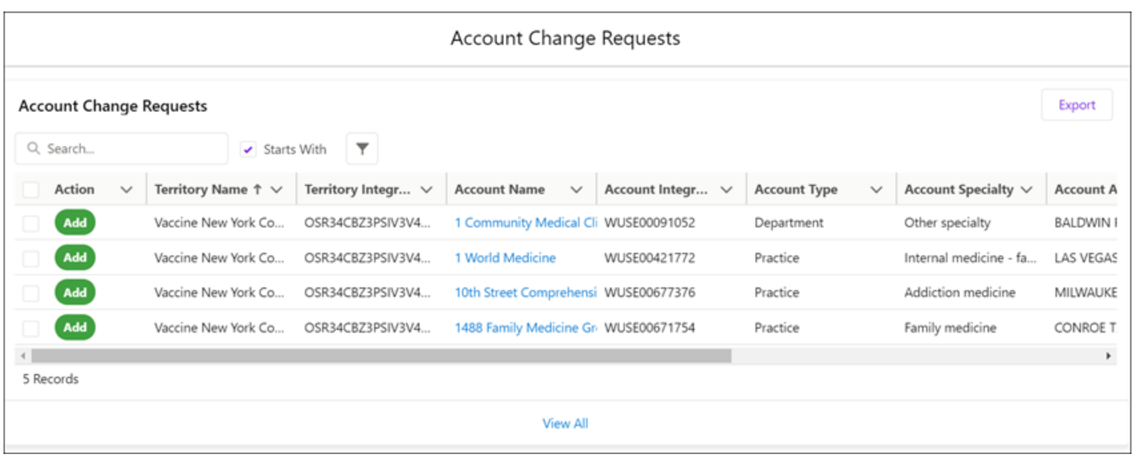


4. For detailed information on change request data:

   - Hover over the graph bar to quickly view a popup of the results.



   - Click the graph bar to display the Account Change Requests screen.



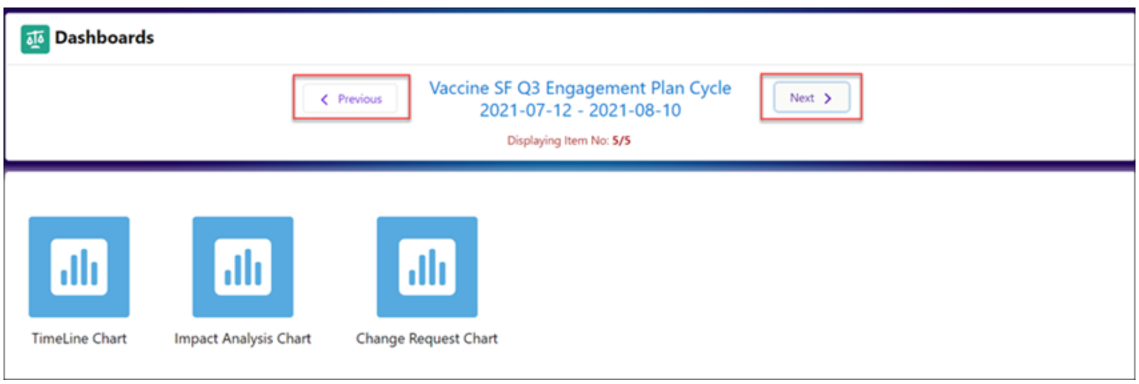
District Manager Dashboard

The **Dashboard** tab contains up to three sections:

- The **TimeLine Chart** includes a graph of milestone dates of the adjudication, as well as a Change Requests Status grid that provides a quick view of the status of the change requests for your assigned territories.
- The **Impact Analysis Chart** displays an analysis of the contents of an adjudication process for future adjudication types. If the adjudication is not marked as *Future*, this chart will not display.
- The **Change Request Chart** displays change request data for the adjudication.

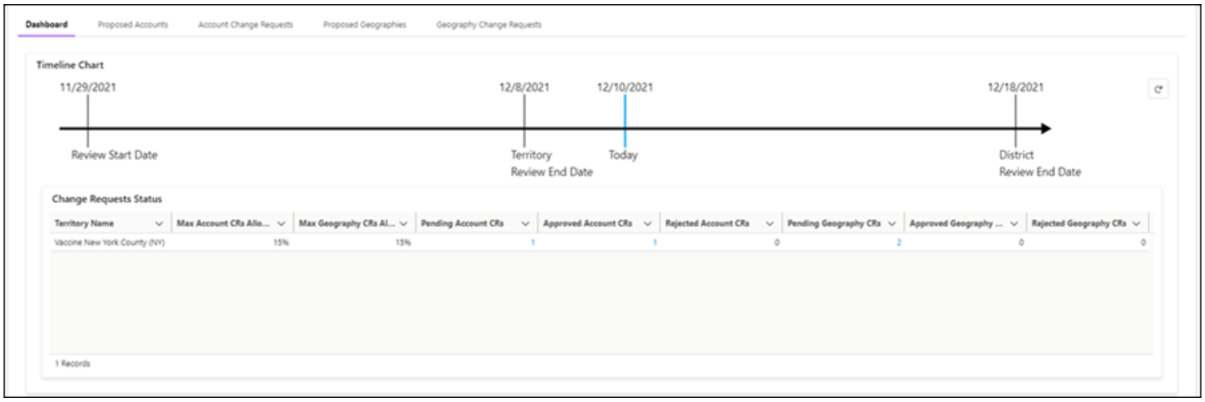
To view the TimeLine Chart

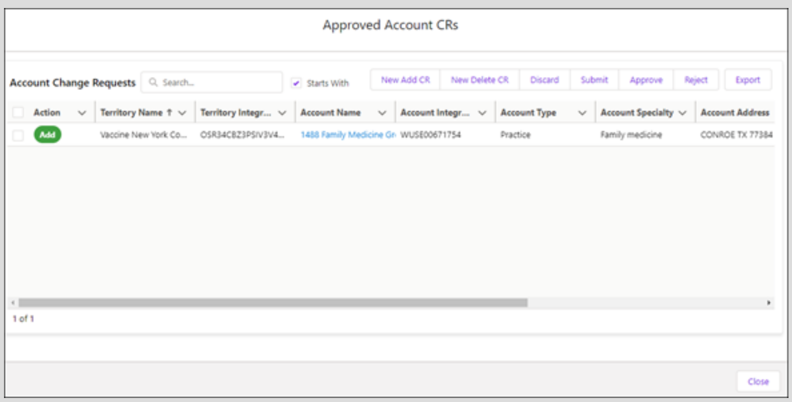
1. From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.



2. Click **TimeLine Chart** .

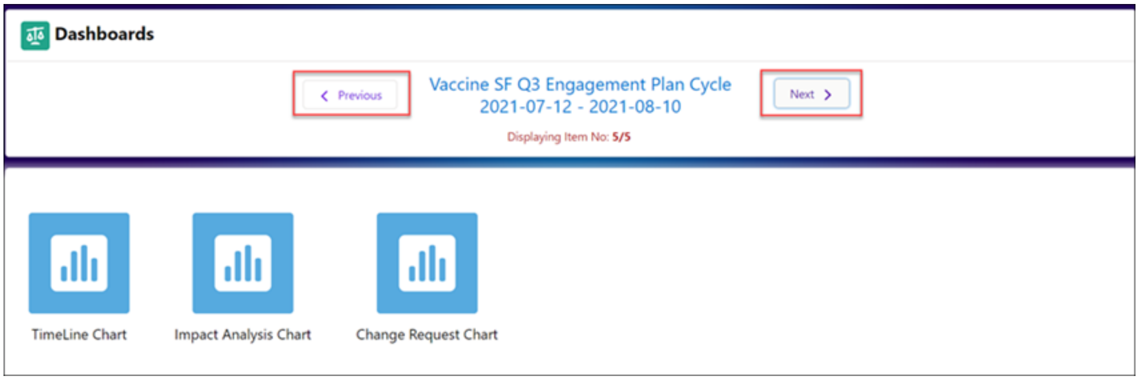
3. View the milestone dates and change requests status.



> **Note:** Click on any change request's number count to open an actionable window for the corresponding type of change request. For example, click a number in the **Approved Account CRs** column (above) for a specific change request to display a window to perform different actions on that request.
>
> 
>

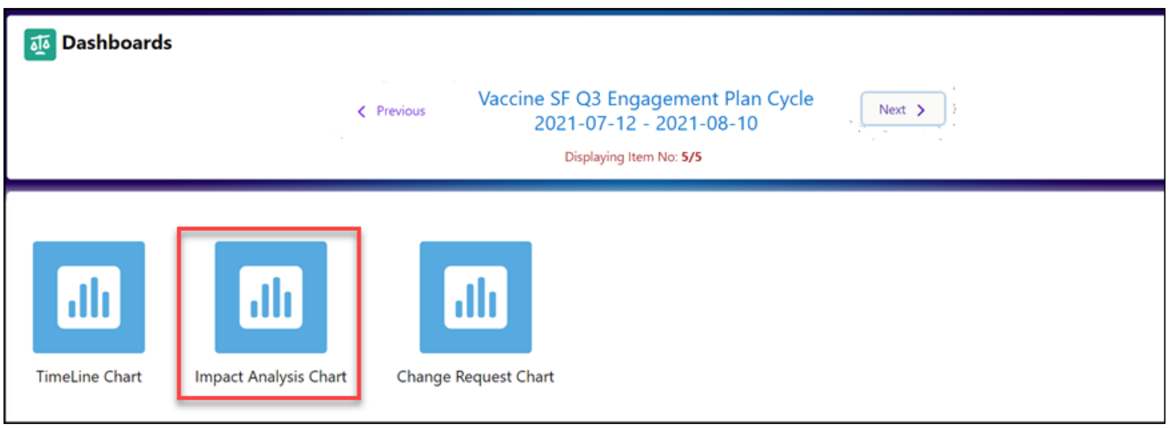
To view the Impact Analysis Chart

1. From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.

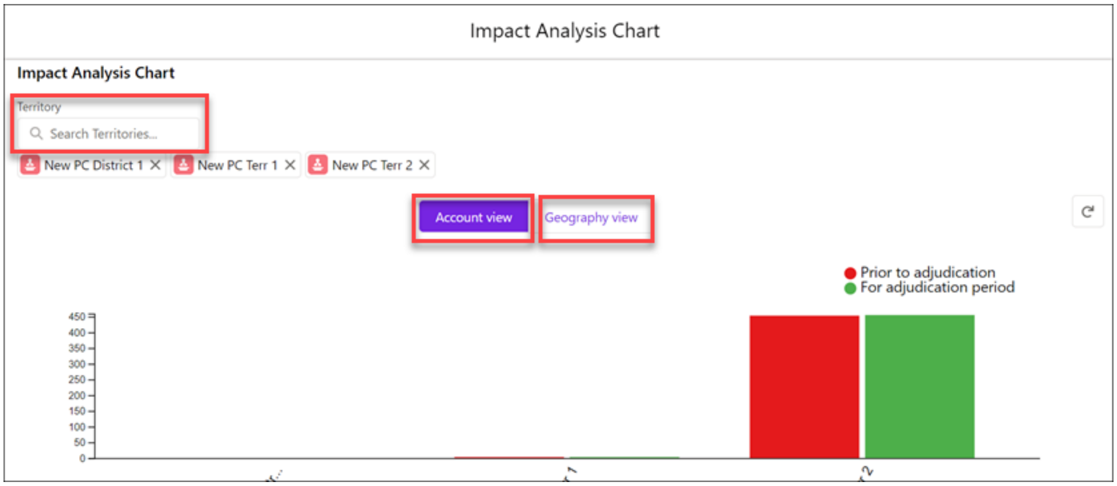


Note: The **Impact Analysis Chart** only appears for adjudications with *Future* as the Adjudication Type.

2. Click **Impact Analysis Chart**  .

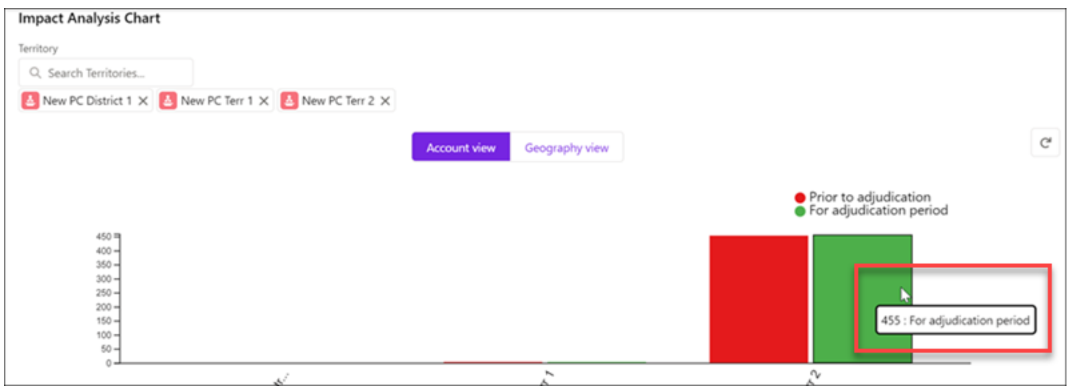


3. Search for territories using the **Territory** search box, and select **Account view** to display account information or **Geography view** to display geography information.

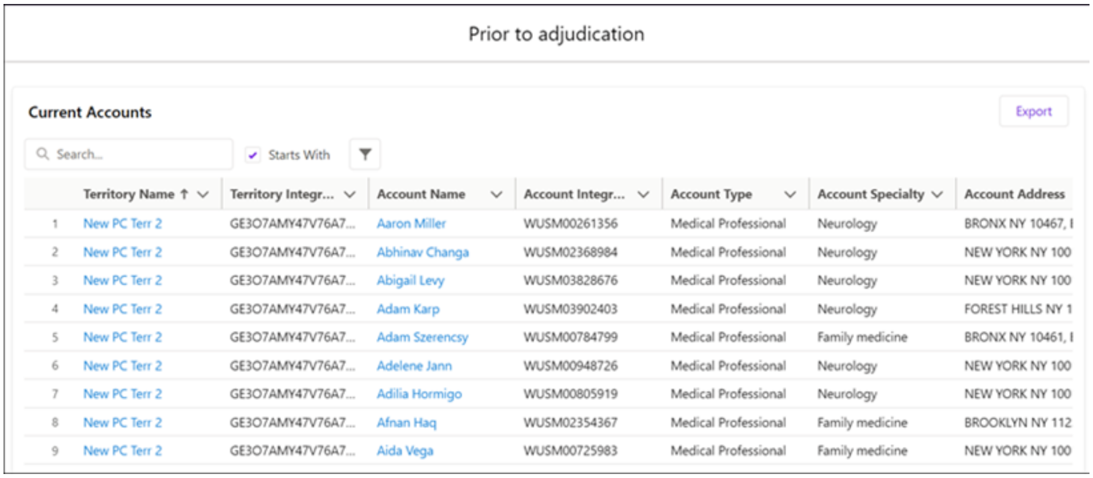


For detailed information on data prior to adjudication (red) and current adjudication period data (green), you can do each of the following:

- Hover over either of the graph bars to quickly view a popup of the results.



- Click the red *Prior to adjudication* graph bar to display the Prior to adjudication screen.



Prior to adjudication

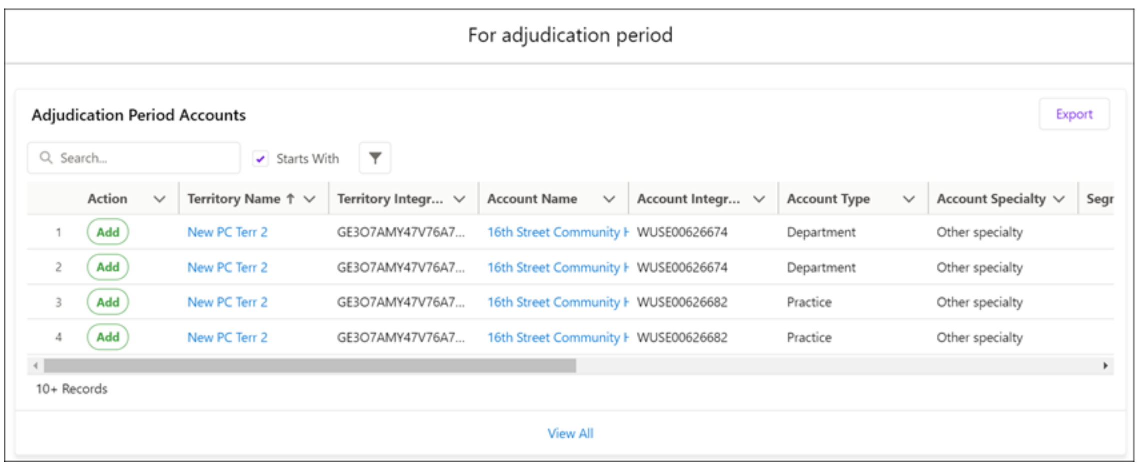
Current Accounts

Export

Search... ✓ Starts With

	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Address
1	New PC Terr 2	GE3O7AMY47V76A7...	Aaron Miller	WUSM00261356	Medical Professional	Neurology	BRONX NY 10467, I
2	New PC Terr 2	GE3O7AMY47V76A7...	Abhinav Changa	WUSM02368984	Medical Professional	Neurology	NEW YORK NY 100
3	New PC Terr 2	GE3O7AMY47V76A7...	Abigail Levy	WUSM03828676	Medical Professional	Neurology	NEW YORK NY 100
4	New PC Terr 2	GE3O7AMY47V76A7...	Adam Karp	WUSM03902403	Medical Professional	Neurology	FOREST HILLS NY 1
5	New PC Terr 2	GE3O7AMY47V76A7...	Adam Szerencsy	WUSM00784799	Medical Professional	Family medicine	BRONX NY 10461, I
6	New PC Terr 2	GE3O7AMY47V76A7...	Adelene Jann	WUSM00948726	Medical Professional	Neurology	NEW YORK NY 100
7	New PC Terr 2	GE3O7AMY47V76A7...	Adilia Hormigo	WUSM00805919	Medical Professional	Neurology	NEW YORK NY 100
8	New PC Terr 2	GE3O7AMY47V76A7...	Afnan Haq	WUSM02354367	Medical Professional	Family medicine	BROOKLYN NY 112
9	New PC Terr 2	GE3O7AMY47V76A7...	Aida Vega	WUSM00725983	Medical Professional	Family medicine	NEW YORK NY 100

- Click the green *For adjudication period* graph bar to display the For adjudication period screen.



For adjudication period

Adjudication Period Accounts

Export

Search... ✓ Starts With

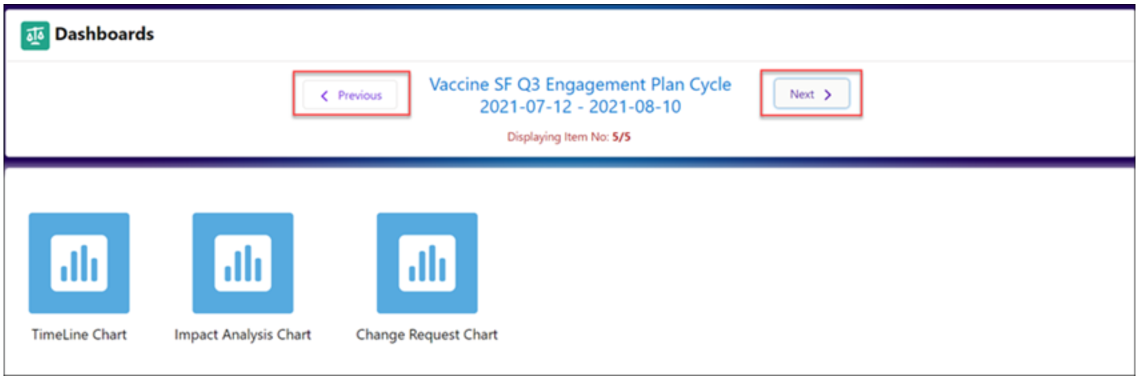
	Action	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Segr
1	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community H	WUSE00626674	Department	Other specialty	
2	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community H	WUSE00626674	Department	Other specialty	
3	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community H	WUSE00626682	Practice	Other specialty	
4	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community H	WUSE00626682	Practice	Other specialty	

10+ Records

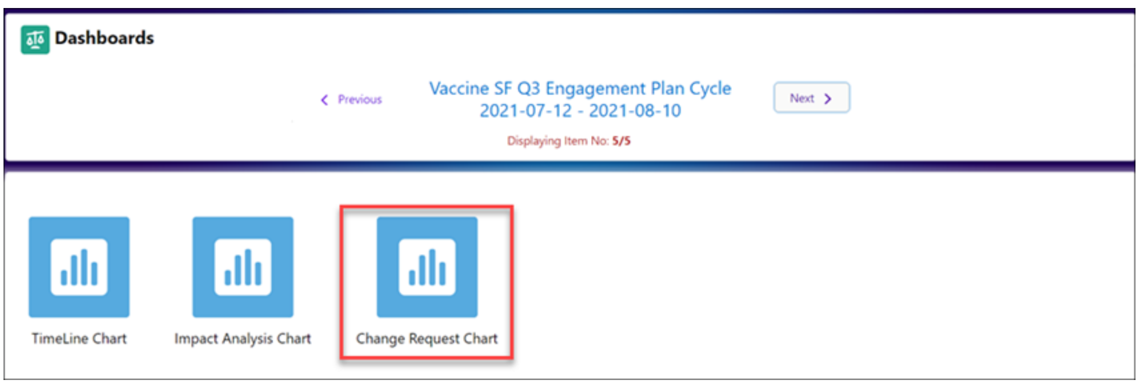
View All

To view the Change Request Chart

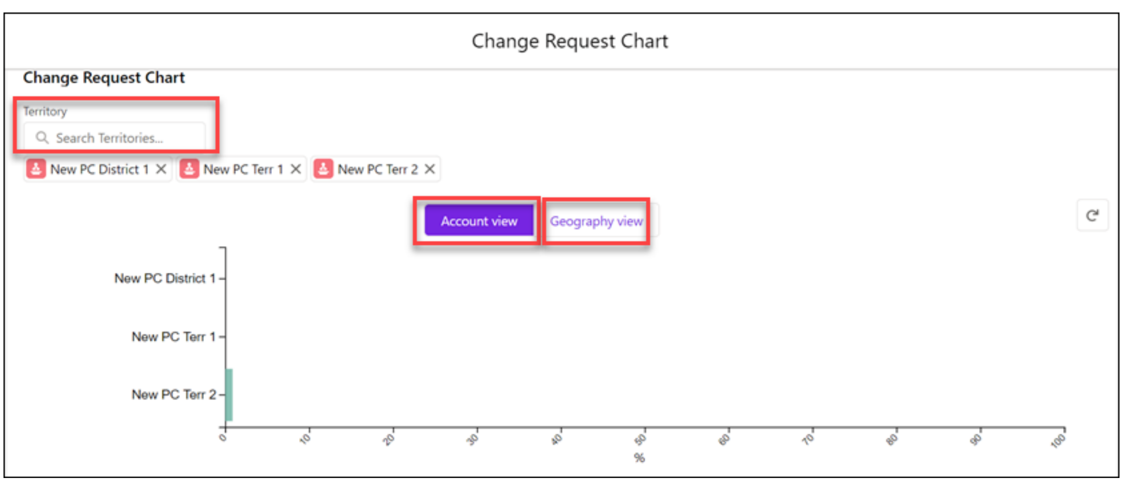
1. From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.



2. Click **Change Request Chart**  .



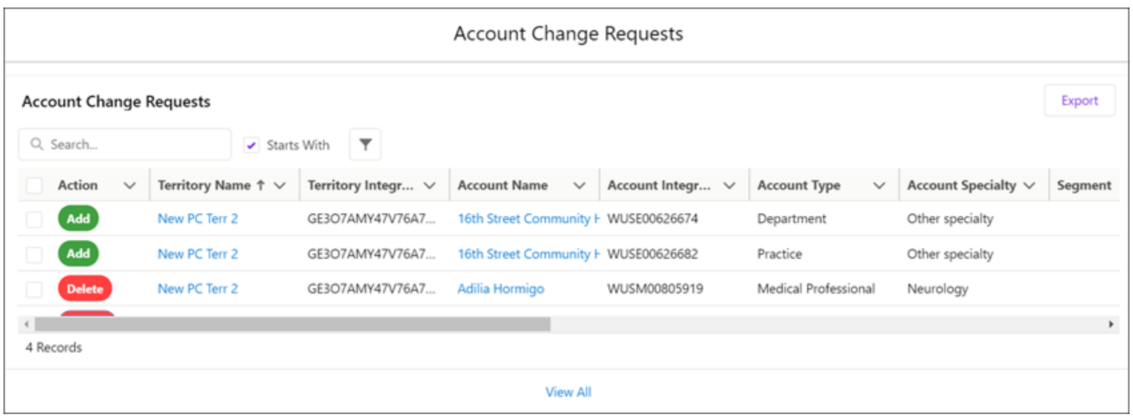
3. Search for territories using the **Territory** search box and select **Account view** to display account information or **Geography view** to display geography information.



4. For detailed information on change request data, do each of the following:

   - Hover over the graph bar to quickly view a popup of the results.

   - Click the graph bar to display the Account Change Requests screen.



View Adjudications (Reps, DMs)

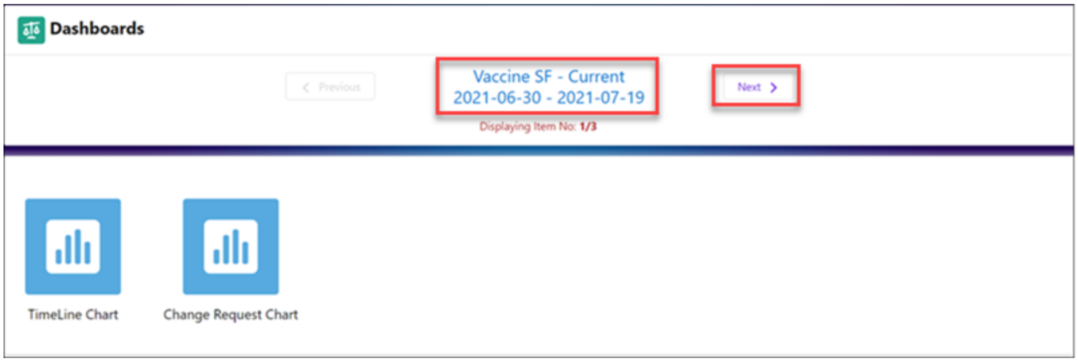
Access **Adjudications** to view current or future adjudication cycles.

Note: Depending on your access level, you might be able to view only current adjudications.

To view an adjudication

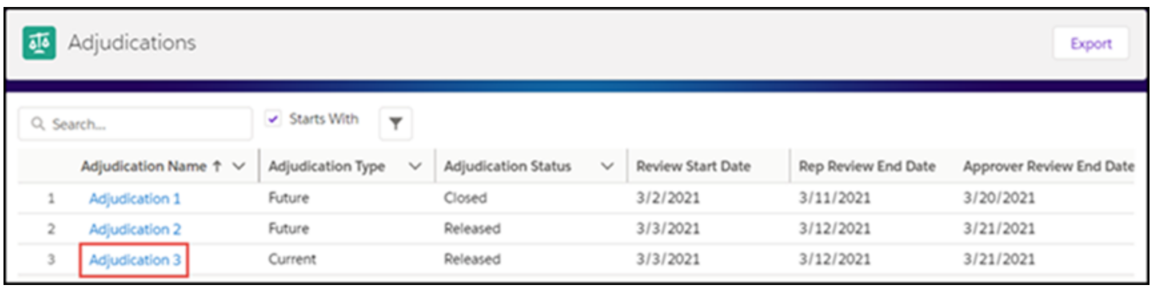
1. Do one of the following:

   - From **Dashboards**, click **Next** until you see the adjudication you would like to view, then click it.



- Click **Adjudications** from the primary navigation bar, then select the adjudication you would like to view from the Adjudications screen.

> **Note:** Use the **Search** and **Filters** functions to help you locate the adjudication. See Search and Filter Functions.



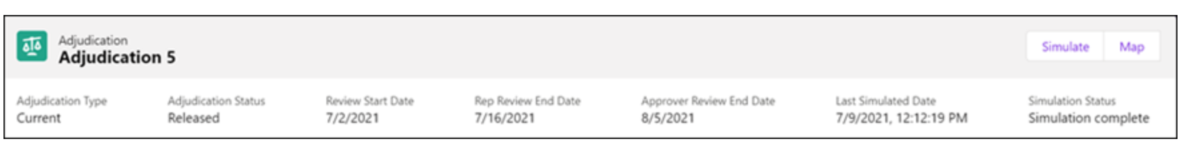
2. View the adjudication information.

   The Adjudication Name, actions available for the adjudication, and Adjudication highlight section display on the top of the Adjudication entity page for all the Adjudication tabs.

   ### Actions

   - **Simulate**: Calculate the impact of the account change.
   - **Map**: Toggle to maps view to display, add, and delete accounts and geographies. See Manage Transactions Using Maps.

   ### Highlight Section



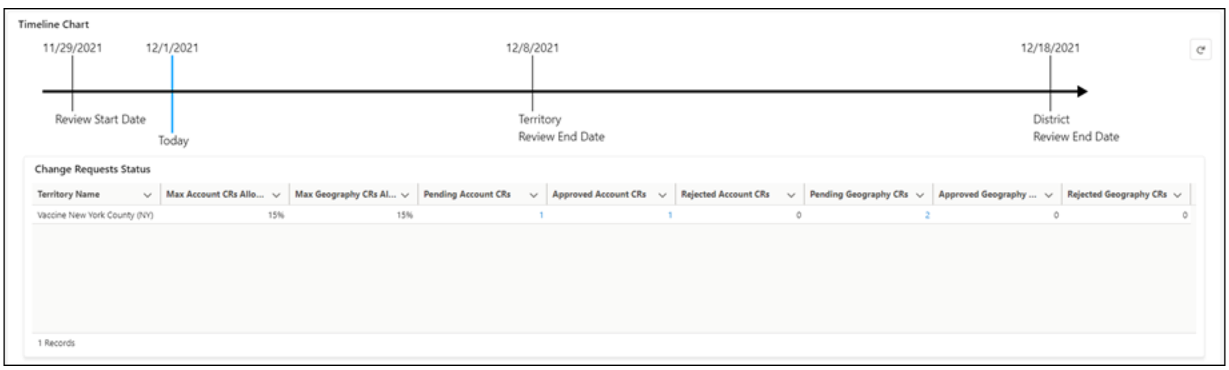
- **Adjudication Name**: Name of the adjudication.
- **Adjudication Type**: *Current* or *Future*.
- **Adjudication Status**: *Pending* or *Released*.
- **Review Start Date**: Indicates the date when the adjudication is submitted to the field for review and feedback.
- **Rep Review End Date**: Indicates the date the review and feedback of the adjudication is due for the Rep.
- **Approver Review End Date**: Indicates the end date of the adjudication cycle.
- **Last Simulated Date**: The date the changes were last simulated.
- **Simulation Status**: The current status of the simulation, including *Simulating*, *Simulation complete*, etc.

Adjudications Dashboard Tab

The Adjudications **Dashboard** tab contains up to three sections.

Timeline Chart

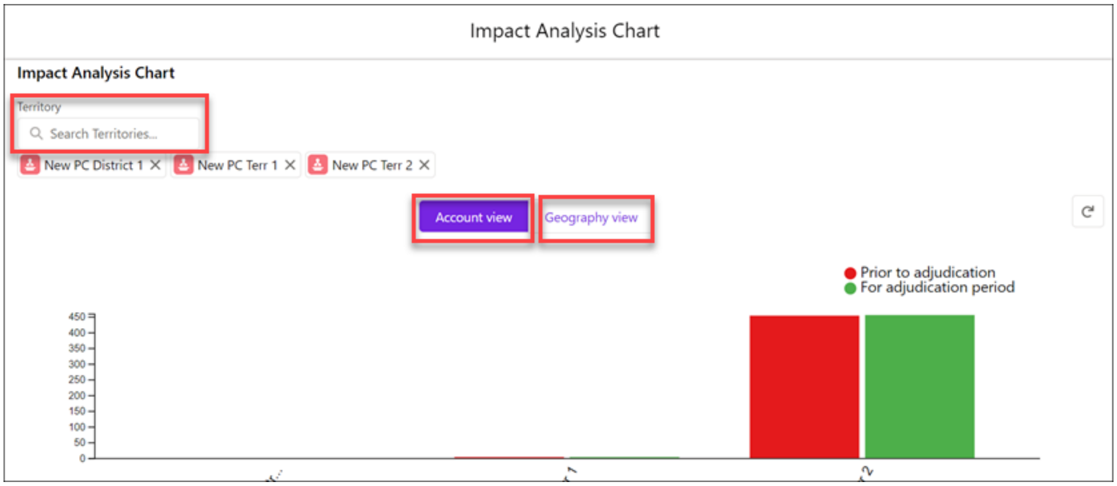
The Timeline Chart includes the milestone dates of the adjudication, as well as a quick view of the change requests statuses for your assigned territories.



> **Note:** To view change request details, click on the count value in the **Change Requests Status** grid.

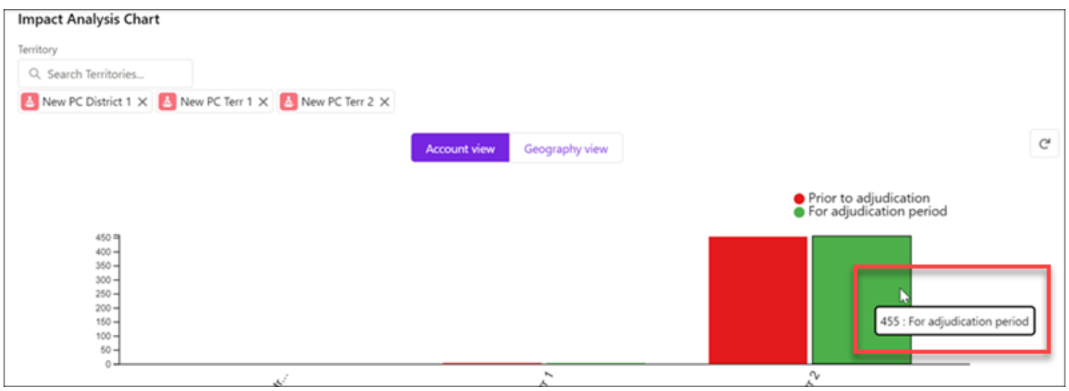
Impact Analysis Chart

The Impact Analysis Chart displays an analysis of the contents of an adjudication process for Future adjudication types only. If the adjudication is not marked as *Future*, this chart will not appear.

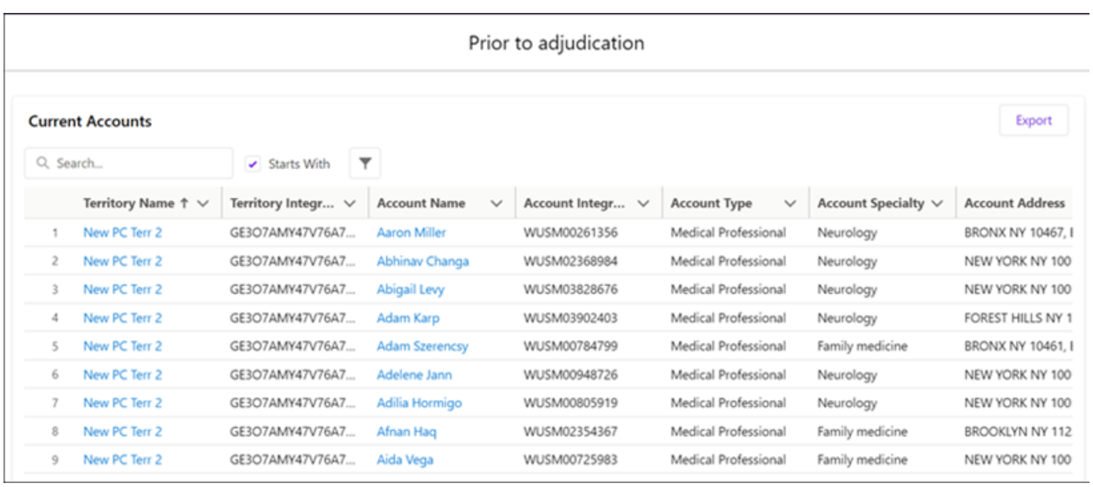


Hover over either of the graph bars to quickly view a popup of the results.

For detailed information on data prior to adjudication (red) and current adjudication period data (green):

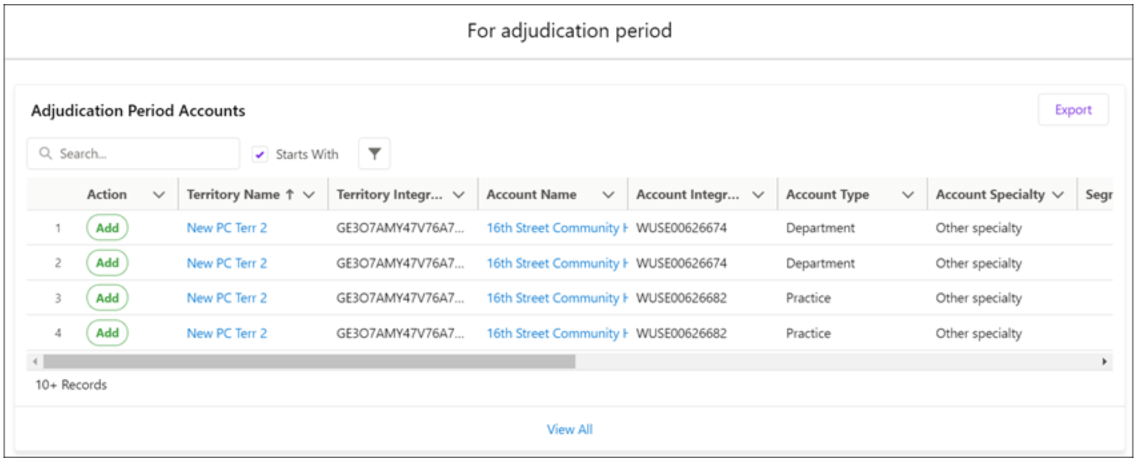


- Click the red *Prior to adjudication* graph bar to display the Prior to adjudication screen.



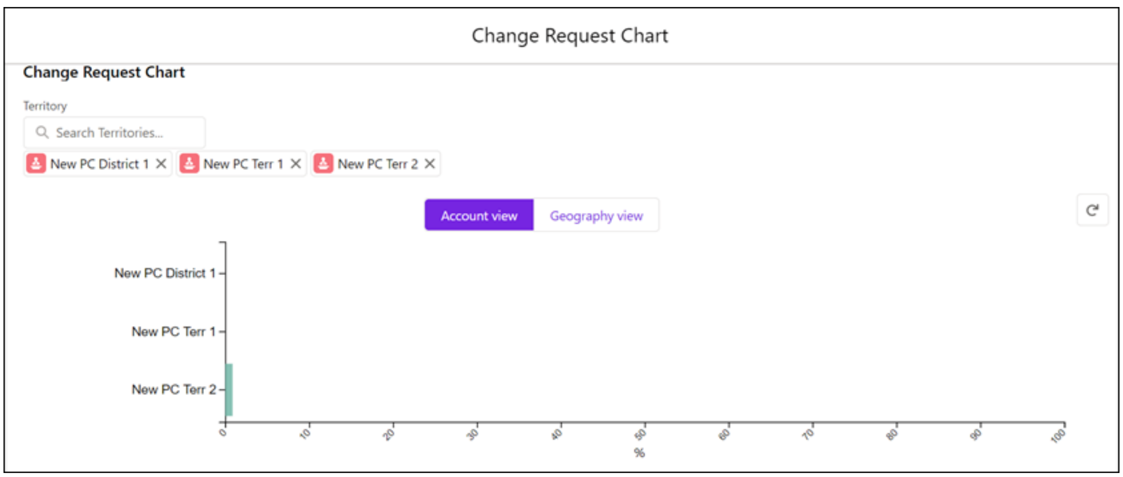
	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Address
1	New PC Terr 2	GE3O7AMY47V76A7...	Aaron Miller	WUSM00261356	Medical Professional	Neurology	BRONX NY 10467, I
2	New PC Terr 2	GE3O7AMY47V76A7...	Abhinav Changa	WUSM02368984	Medical Professional	Neurology	NEW YORK NY 100
3	New PC Terr 2	GE3O7AMY47V76A7...	Abigail Levy	WUSM03828676	Medical Professional	Neurology	NEW YORK NY 100
4	New PC Terr 2	GE3O7AMY47V76A7...	Adam Karp	WUSM03902403	Medical Professional	Neurology	FOREST HILLS NY 1
5	New PC Terr 2	GE3O7AMY47V76A7...	Adam Szerencsy	WUSM00784799	Medical Professional	Family medicine	BRONX NY 10461, I
6	New PC Terr 2	GE3O7AMY47V76A7...	Adelene Jann	WUSM00948726	Medical Professional	Neurology	NEW YORK NY 100
7	New PC Terr 2	GE3O7AMY47V76A7...	Adilia Hormigo	WUSM00805919	Medical Professional	Neurology	NEW YORK NY 100
8	New PC Terr 2	GE3O7AMY47V76A7...	Afnan Haq	WUSM02354367	Medical Professional	Family medicine	BROOKLYN NY 112
9	New PC Terr 2	GE3O7AMY47V76A7...	Aida Vega	WUSM00725983	Medical Professional	Family medicine	NEW YORK NY 100

- Click the green *For adjudication period* graph bar to display the For adjudication period screen.



Change Request Chart

The Change Request Chart displays change request data for the adjudication.



You can search for territories using the **Territory** search box. Select **Account view** to display account information or **Geography view** to display geography information.

Hover over the graph bar to quickly view a popup of the results.

For detailed information on change request data, click the graph bar to display the Account Change Requests screen.

Proposed Accounts Tab

From the **Proposed Accounts** tab, you can view all of the proposed account changes, specific differences between current account data and proposed account data, and only the accounts that are impacted by a change request.

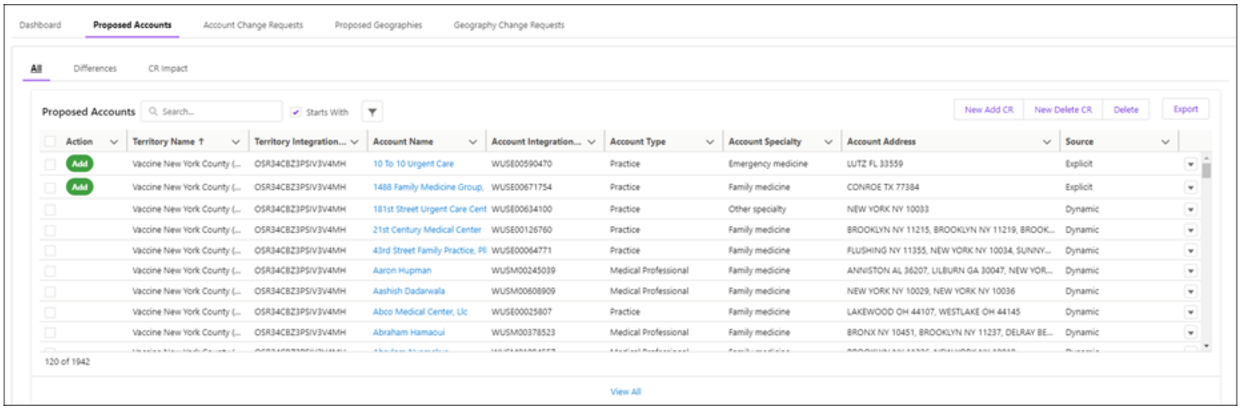
Note: You do not have to simulate an adjudication to view *Add* change requests on the **Proposed Accounts** tab.

The following buttons are available on some or all views of the **Proposed Accounts** tab:

- **New Add CR**: Create a change request to add an account(s) to a territory.
- **New Delete CR**: Create a change request to delete an account(s) from a territory.
- **Add**: Add an account to the territory.
- **Delete**: Delete an account from the territory.
- **Export**: Export current file.

View All Account Changes

Click the **All** view tab to view all proposed accounts included in the adjudication. Any changes are indicated by an **Add** or **Delete** icon in the **Action** column.



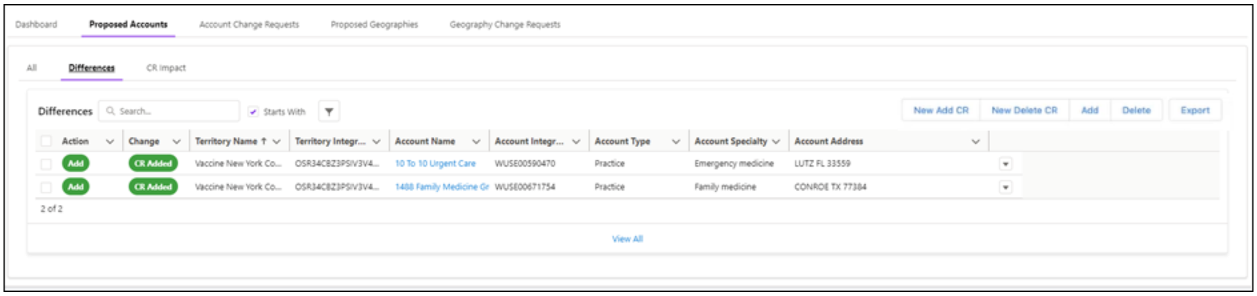
- **Action**: Corresponding account marked for *Add* or *Delete*. *Update* appears only for engagement plans and applies to **Segment** and **Call Frequency** updates.

> **Note:** Actions with a solid-colored icon indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color indicate an updated, but not simulated change.

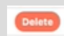
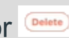
- **Territory Name**: Name of the territory the account is aligned to.
- **Territory Integration ID**: Unique territory identification number.
- **Account Name**: Name of the account that is part of the change request.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Discard CR**: Click the drop-down for a specific territory that is attached to a change request and select to delete the change request.
- **Submit CR**: Click the drop-down for a specific territory that is attached to a change request and select to submit the change request.
- **CR Details**: Click the drop-down for a specific territory and select to view change request details.
- **Delete**: Click the drop-down for a specific territory and select to delete the account from the territory.

View Differences Between Current and Proposed Account Data

Click the **Differences** tab to view only the proposed changes between the current accounts and the proposed accounts. This view indicates changes added by the Rep or DM ***(****CR Added*) and/or changes made by HO user (*HO Added*, *HO Deleted*).



- **Action**: Corresponding account marked for *Add* or *Delete*. *Update* appears only for engagement plans and applies to **Segment** and **Call Frequency** updates.

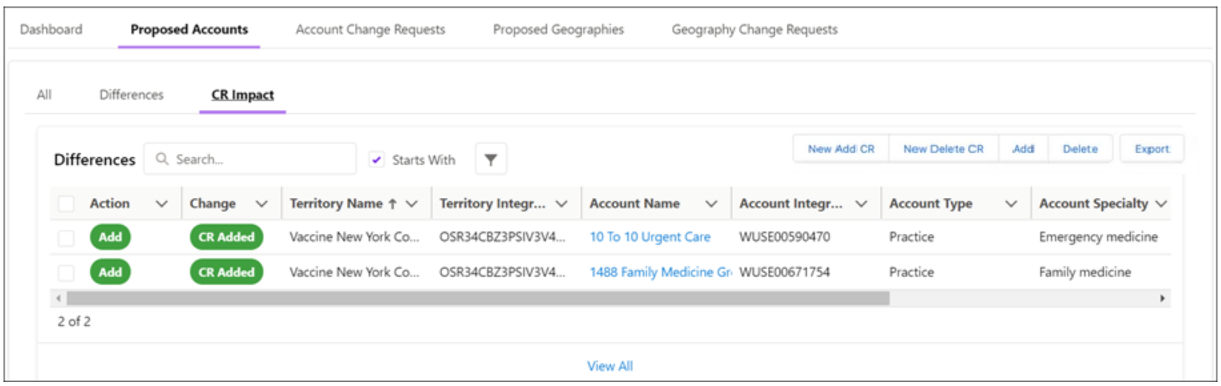
> **Note:** Actions with a solid-colored icon  indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color  indicate an updated, but not simulated change.

- **Change**: The change made to the account, such as *CR Added*, *Gained*, *Lost*, or *HO Deleted*.
- **Territory Name**: Name of the territory the account is aligned to.
- **Territory Integration ID**: Unique territory identification number.
- **Account Name**: Name of the account that is part of the change request.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Area of expertise.
- **Segment**: The hierarchy of the account (Gold, High, Low, etc.). Displays the original and updated values.
- **Call Frequency**: The method used to contact the account and the number of times the account is contacted. Displays the original and updated values.
- **Account Address**: Address of the account.

- **Discard CR**: Click the drop-down for a specific territory that is attached to a change request and select to delete the change request.
- **Submit CR**: Click the drop-down for a specific territory that is attached to a change request and select to submit the change request.
- **CR Details**: Click the drop-down for a specific territory and select to view change request details.

View Only Accounts Impacted by a Change Request

Click the **CR Impact** tab to view the change requests that have been made against the adjudication.



- **Action**: Corresponding account marked for *Add* or *Delete*. *Update* appears only for engagement plans and applies to **Segment** and **Call Frequency** updates.

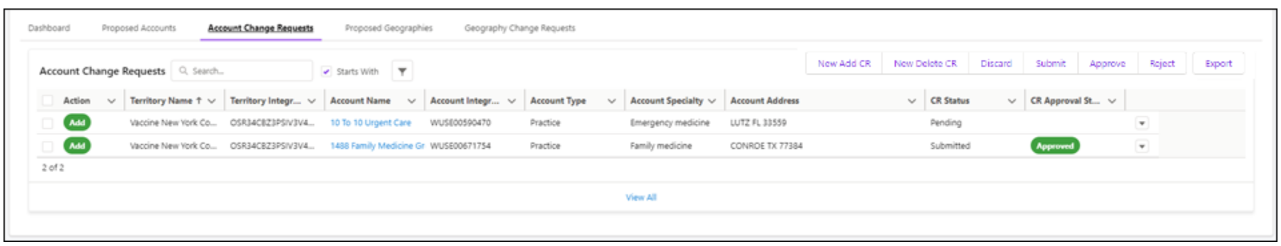
> **Note:** Actions with a solid-colored icon indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color indicate an updated, but not simulated change.

- **Change**: The change made to the account, such as *CR Added*, *Gained*, *Lost*, or *HO Deleted*.
- **Territory Name**: Name of the territory the account is aligned to.
- **Territory Integration ID**: Unique territory identification number.
- **Account Name**: Name of the account that is part of the change request.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Area of expertise.

- **Segment**: The hierarchy of the account (Gold, High, Low, etc.). Displays the original and updated values.
- **Call Frequency**: The method used to contact the account and the number of times the account is contacted. Displays the original and updated values.
- **Account Address**: Address of the account.
- **Discard CR**: Click the drop-down for a specific territory that is attached to a change request and select to delete the change request.
- **Submit CR**: Click the drop-down for a specific territory that is attached to a change request and select to submit the change request.
- **CR Details**: Click the drop-down for a specific territory and select to view change request details.

Account Change Requests Tab (Reps, DMs)

The **Account Change Requests** tab displays the account changes you made before and after simulating the adjudication.



- **Action**: *Add* or *Delete*. *Update* appears only for engagement plans and applies to updates to **Segment** and **Call Frequency**. *Update* appears only for engagement plans and applies to Segment and Call Frequency updates.

> **Note:** Actions with a solid-colored icon indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color indicate an updated, but not simulated change.

> **Note:** Reps and Managers can see and discard/submit Change Requests they create and Change Requests created by other users assigned to the territory.

- **Territory Name**: Name of the territory the account is aligned to.

- **Territory Integration ID**: Unique territory identification number.
- **Account Name**: Name of the account that is part of the change request.
- **Account Integration ID**: Unique account identification number.
- **Account Type**: Health care professional or health care organization.
- **Account Specialty**: Area of expertise.
- **Segment**: The hierarchy of the account (Gold, High, Low, etc.) Displays the original and updated values.
- **Call Frequency**: The method used to contact the account and the number of times the account is contacted. Displays the original and updated values.
- **Account Address**: Address of the account.
- **CR Status**: *Pending* or *Submitted*.
- **CR Approval Status**: *Pending*, *Approved*, or *Rejected*.
- **Discard**: Click the drop-down for a specific account and select to discard the change request.
- **Submit**: Click the drop-down for a specific account and select to submit the change request.
- **CR Details**: Click the drop-down for a specific account and view change request details.
- **New Add CR**: Create a change request to add an account(s) to a territory.
- **New Delete CR**: Create a change request to delete an account(s) from a territory.
- **Discard**: Discard the account change request.
- **Submit**: Submit the account change request.
- **Approve**: (Available for DMs only) Approve the account change request.
- **Reject**: (Available for DMs only) Reject the account change request.
- **Export**: Export current file.

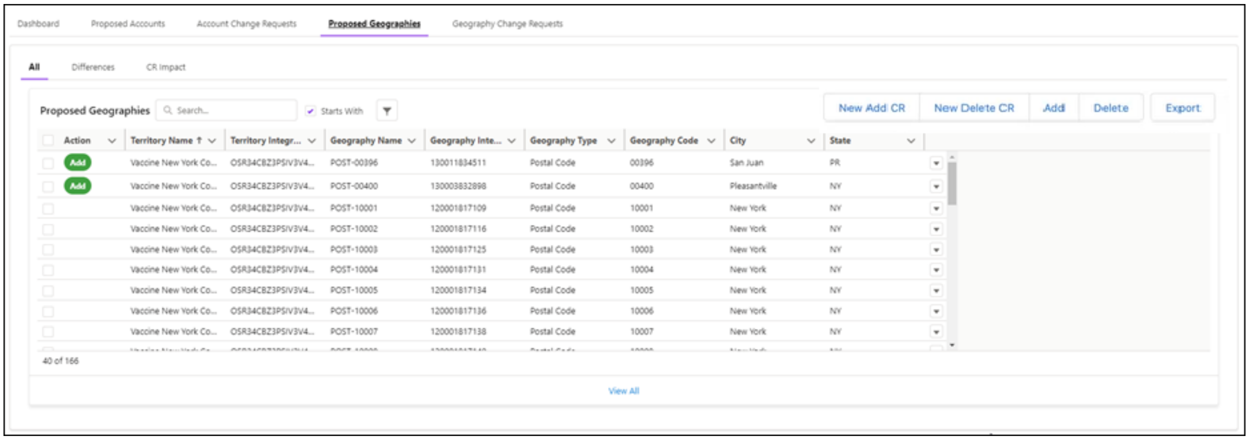
Proposed Geographies Tab

From the **Proposed Geographies** tab, you can view all proposed geography changes, view specific differences between the current geography data and proposed geography data, and view only the geographies that are impacted by a change request.

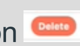
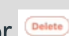
Note:	You do not have to simulate an adjudication to view *Add* change requests on the **Proposed Geographies** tab.

View All Geography Changes

Click the **All** tab to view all proposed geographies included in the adjudication. Any changes are indicated by an **Add** or **Delete** icon in the **Action** column.



- **Action**: Corresponding geography marked for *Add* or *Delete*.

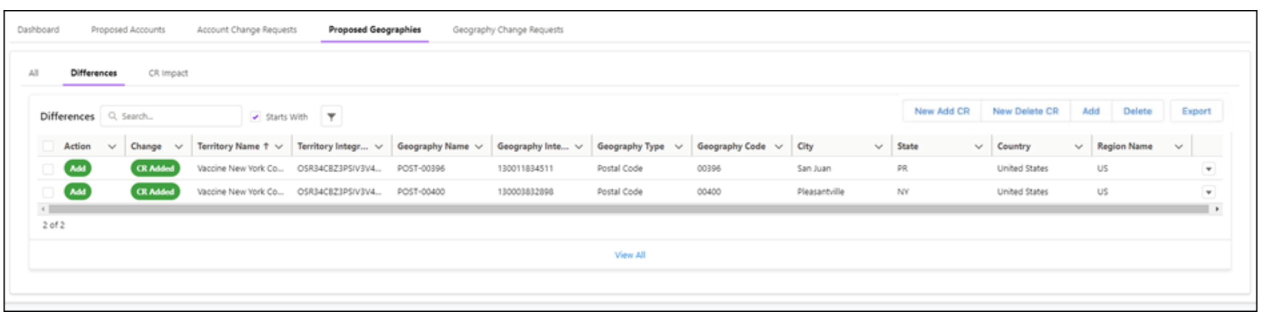
Note:	Actions with a solid-colored icon  indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color  indicate an updated, but not simulated change.

- **Territory Name**: Name of the territory the geography is aligned to.
- **Territory Integration ID**: Unique territory identification number.
- **Geography Name**: Name of the geography that is part of the change request.
- **Geography Integration ID**: Unique geography identification number.
- **Geography Type**: Health care professional or health care organization.
- **Geography Code**: The code or ID for the specific geography, such as postal code 10001 for New York City.
- **City**, **State**: Specific location information for the geography.

- **Discard CR**: Click the drop-down for a specific territory that is attached to a change request and select to delete the change request.
- **Submit CR**: Click the drop-down for a specific territory that is attached to a change request and select to submit the change request.
- **CR Details**: Click the drop-down for a specific territory and select to view change request details.
- **Delete**: Click the drop-down for a specific territory and select to delete the account from the territory.
- **New Add CR**: Create a change request to add an account(s) to a territory.
- **New Delete CR**: Create a change request to delete an account(s) from a territory.
- **Add**: Add an account to the territory.
- **Delete**: Delete an account from the territory.
- **Export**: Export current file.

View Differences Between Current and Proposed Geography Data

Click the **Differences** tab to view only the proposed changes between the current geographies and the proposed geographies. This view indicates changes added by the Rep or DM (*CR Added*) and/or changes made by HO user (*HO Added*, *HO Deleted*).



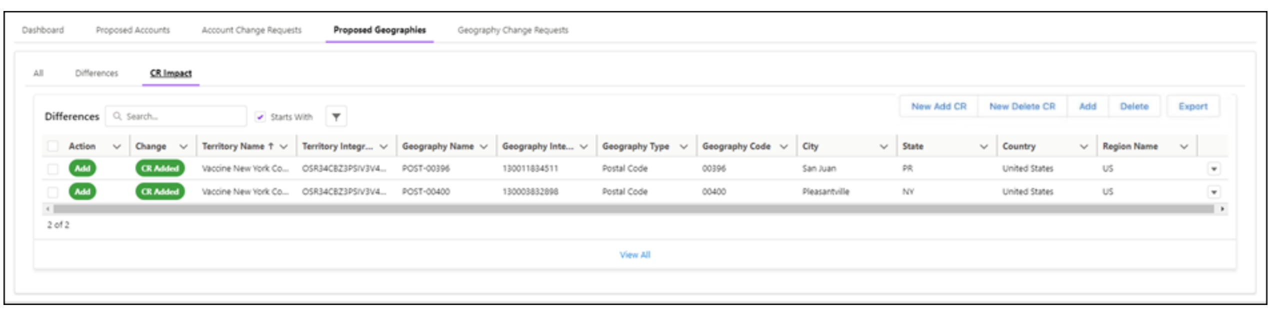
- **Action**: Corresponding geography marked for *Add* or *Delete*.

> **Note:** Actions with a solid-colored icon indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color indicate an updated but not simulated change.

- **Change**: The change made to the geography, such as *CR Added*, *Gained*, *Lost*, or *HO Deleted*.
- **Territory Name**: Name of the territory the geography is aligned to.
- **Territory Integration ID**: Unique territory identification number.
- **Geography Name**: Name of the geography that is part of the change request.
- **Geography Integration ID**: Unique geography identification number.
- **Geography Type**: Health care professional or health care organization.
- **Geography Code**: The code or ID for the specific geography, such as postal code 10001 for New York City.
- **City** and **State**, **Country**, **Region Name**: Specific location information for the geography.
- **Discard CR**: Click the drop-down for a specific territory that is attached to a change request and select to delete the change request.
- **Submit CR**: Click the drop-down for a specific territory that is attached to a change request and select to submit the change request.
- **CR Details**: Click the drop-down for a specific territory and select to view change request details.

View Only Geographies Impacted by a Change Request

Click the **CR Impact** tab to view the geography change requests that have been made against the adjudication.



- **Action**: Corresponding geography marked for *Add* or *Delete*.

> **Note:** Actions with a solid-colored icon indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color indicate an updated, but not simulated change.

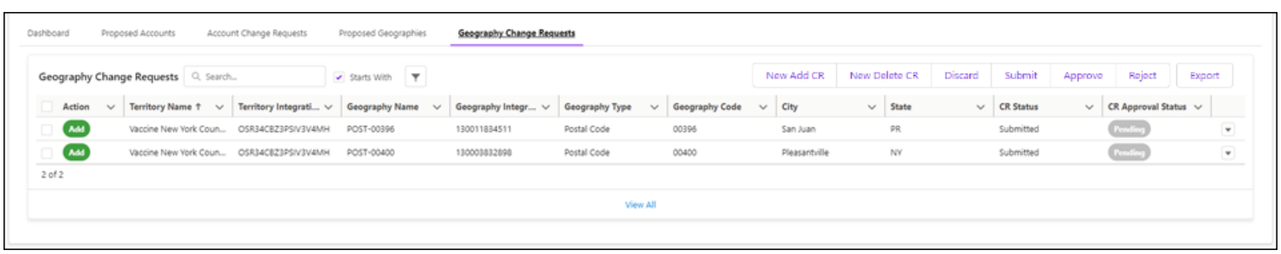
- **Change**: The change made to the geography, such as *CR Added*, *Gained*, *Lost*, or *HO Deleted*.
- **Territory Name**: Name of the territory the geography is aligned to.
- **Territory Integration ID**: Unique territory identification number.
- **Geography Name**: Name of the geography that is part of the change request.
- **Geography Integration ID**: Unique geography identification number.
- **Geography Type**: Health care professional or health care organization.
- **Geography Code**: The code or ID for the specific geography, such as postal code 10001 for New York City.
- **City** and **State**, **Country**, **Region Name**: Specific location information for the geography.
- **Discard CR**: Click the drop-down for a specific territory that is attached to a change request and select to delete the change request.
- **Submit CR**: Click the drop-down for a specific territory that is attached to a change request and select to submit the change request.
- **CR Details**: Click the drop-down for a specific territory and select to view change request details.

Geography Change Requests Tab (Reps, DMs)

This tab displays the geography changes you made before and after simulating the adjudication.

Actions:

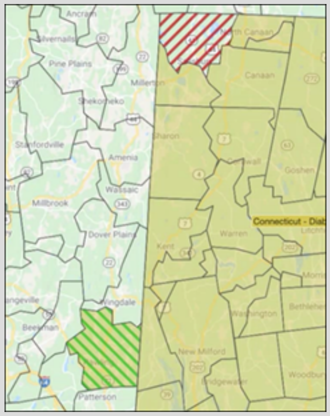
The following buttons are available on the **Geography Change Requests** tab:



- **Action**: *Add* or *Delete*.
- **Territory Name**: Name of the territory the geography is aligned to.
- **Territory Integration ID**: Unique territory identification number.

- **Geography Name**: Name of the geography that is part of the change request.
- **Geography Integration ID**: Unique geography identification number.
- **Geography Type**: The type or level of geography, such as *postal code*, *brick*, or *micro brick*.
- **Geography Code**: The code or ID for the specific geography, such as postal code 10001 for New York City.
- **City** and **State**: Specify location information for the geography.
- **CR Status**: *Pending* or *Submitted*.
- **CR Approval Status**: *Pending*, *Approved*, or *Rejected*.
- **Discard**: Click the drop-down for a specific geography and select to discard the change request.
- **Submit**: Click the drop-down for a specific geography and select to submit the change request.
- **CR Details**: Click the drop-down for a specific territory and select to view change request details.
- **New Add CR**: Create a change request to add a geography to a territory.
- **New Delete CR**: Create a change request to delete a geography from a territory.
- **Discard**: Discard the geography change request.
- **Submit**: Submit the geography change request.
- **Approve**: (Available for DMs only) Approve the geography change request.
- **Reject**: (Available for DMs only) Reject the geography change request.
- **Export**: Export current file.

- **Note:** Geography change requests display on maps as green (add) or red (delete).

Provide Feedback for an Adjudication (Reps, DMs)

After an HO user releases an adjudication for review, you can view it in the Adjudications module. Depending on what actions the HO user has enabled for you, you may be able to add and delete accounts and geographies. DMs can also approve and reject the Rep's changes.

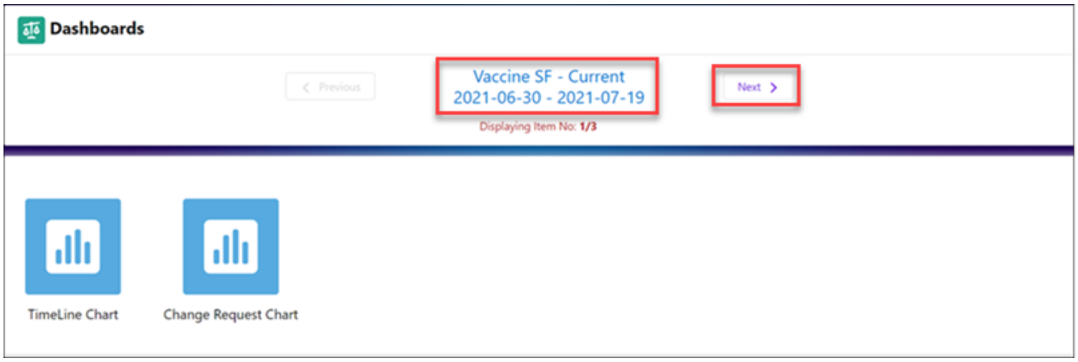
Note: If an adjudication change request has been rejected, you can update it and resubmit it if the review period is open.

To access adjudications

Note: If the adjudication cycle is set to a future date, you will not be able to see the adjudication until the start date of the cycle.

Do one of the following:

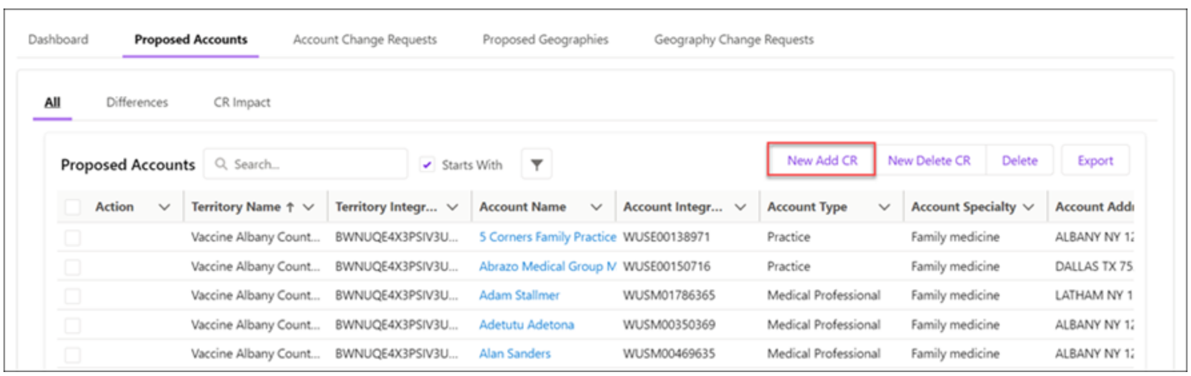
- Click **Dashboards** from the primary navigation bar, click **Next** until you see the adjudication you would like to work with, then click to select it.



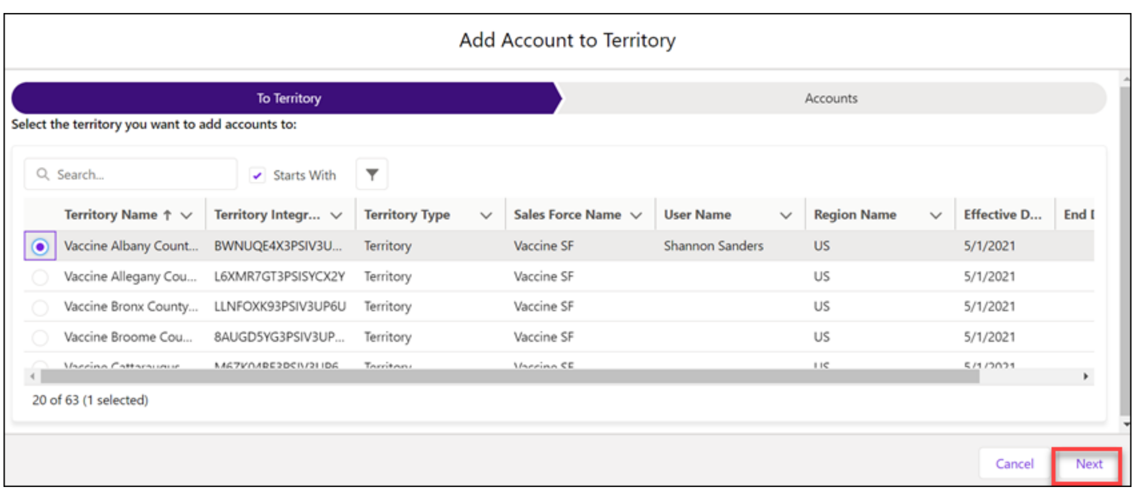
- Click **Adjudications** from the primary navigation bar and select the adjudication you would like to work with.

To add accounts to the alignment

1. From the **Proposed Accounts** tab or the **Account Change Requests** tab, click **New Add CR**.



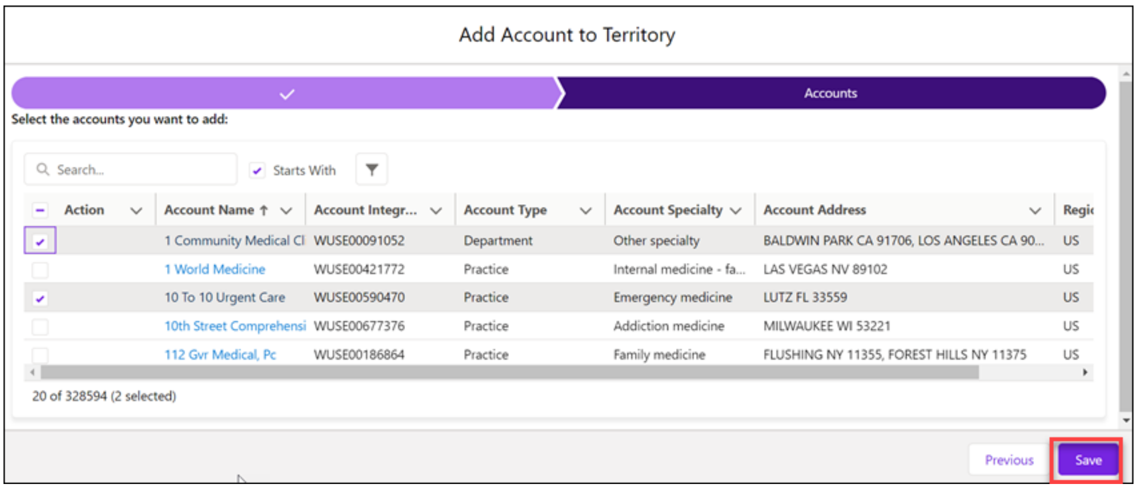
2. Select the territory or multiple territories to add accounts to, then click **Next**.



Note: To view other territories aligned to an account, click beside the desired account and select **View Details**. The Account Territories screen displays the name of the account name at the top and the territories aligned to the account below it.

The **View Details** option displays only if you have permissions. Contact your system administrator for more information.

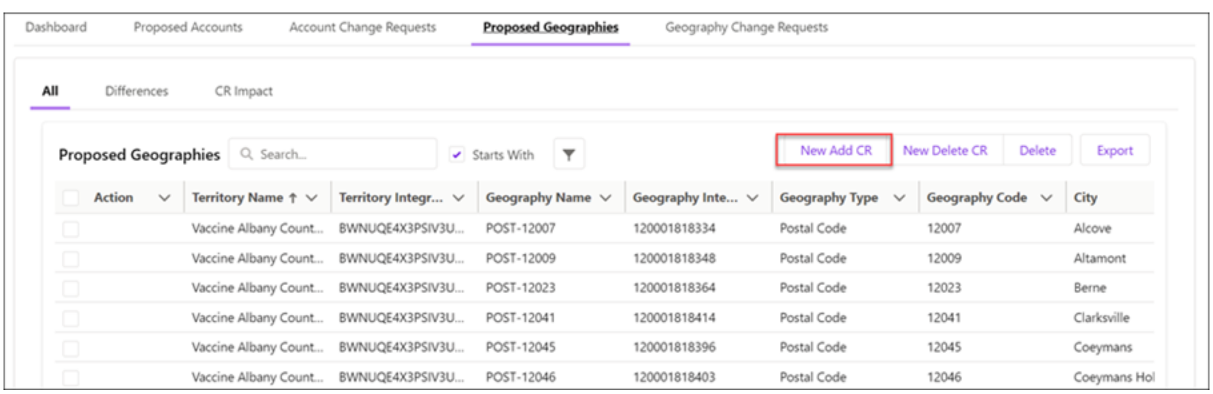
3. Select the accounts you want to add, then click **Save**.



Note: You do not have to simulate an adjudication to view *Add* change requests on the **Proposed Accounts** tab.

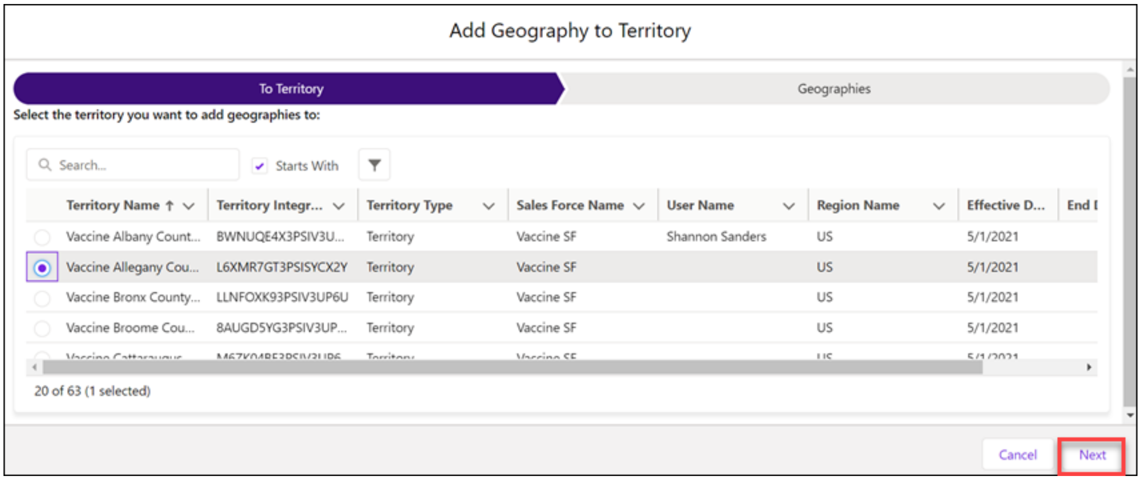
To add geographies to the alignment

1. From the **Proposed Geographies** tab or the **Geography Change Requests** tab, click **New Add CR**.

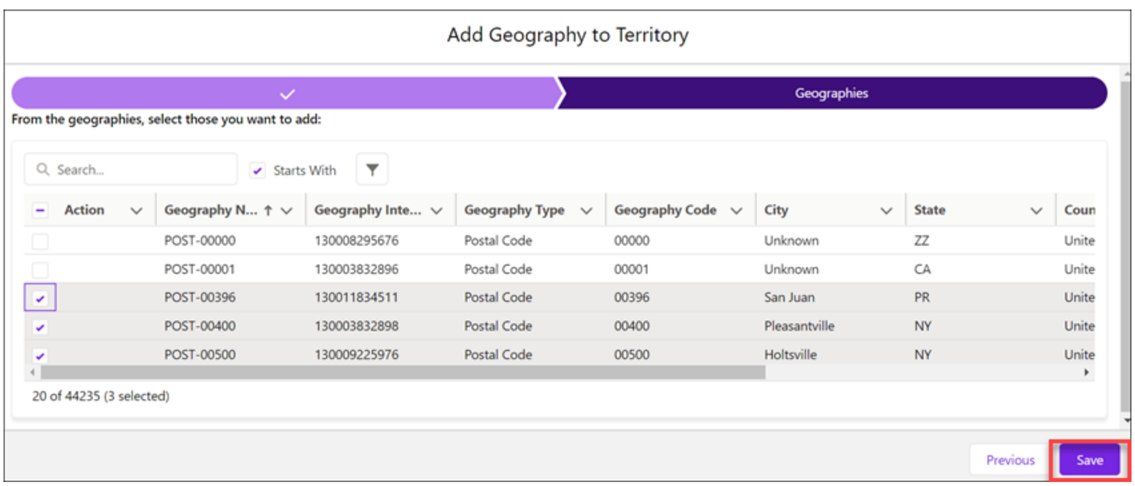


Note:	If a geography is already aligned to another territory in the same sales force, an error appears.

2. Select the territory or multiple territories to add geographies to, then click **Next**.



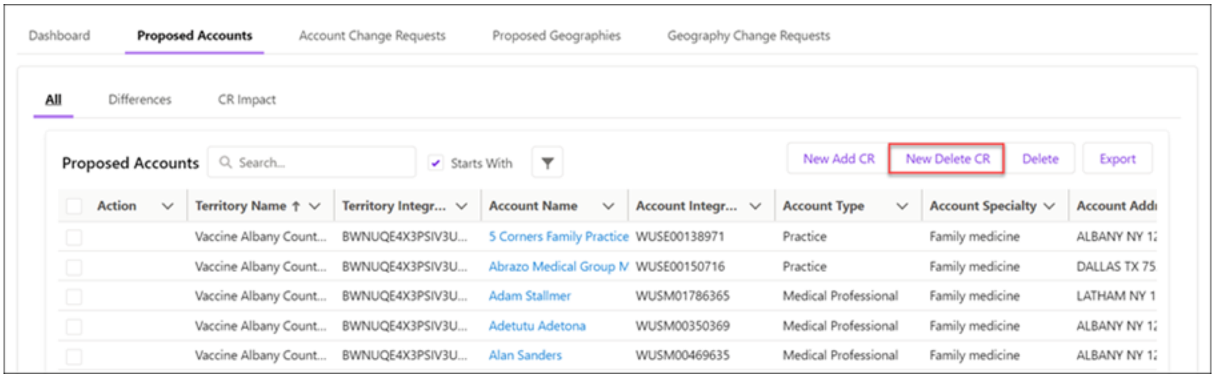
3. Select the geographies you want to add, then click **Save**.



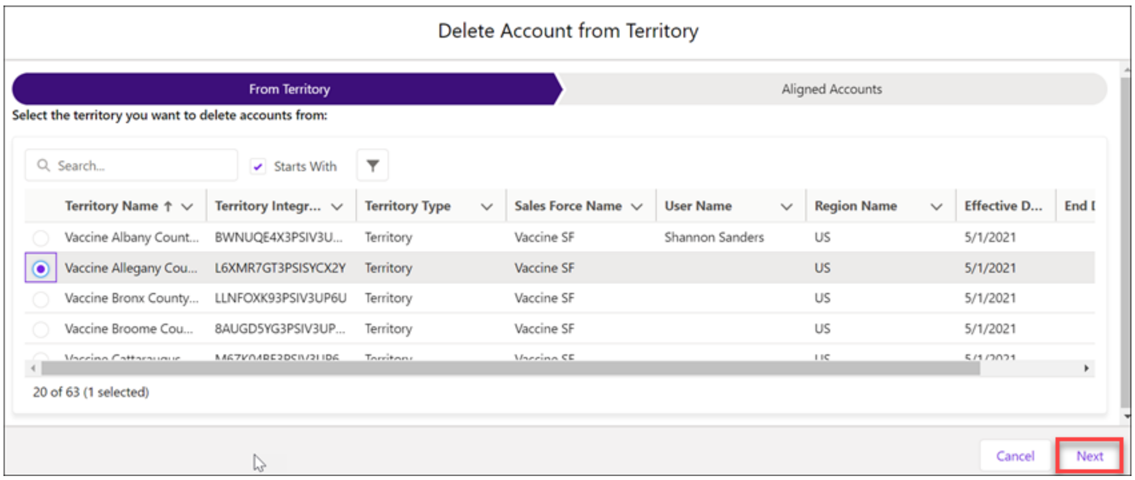
Note:	You do not have to simulate an adjudication to view *Add* change requests on the **Proposed Geographies** tab.

To delete accounts from the alignment

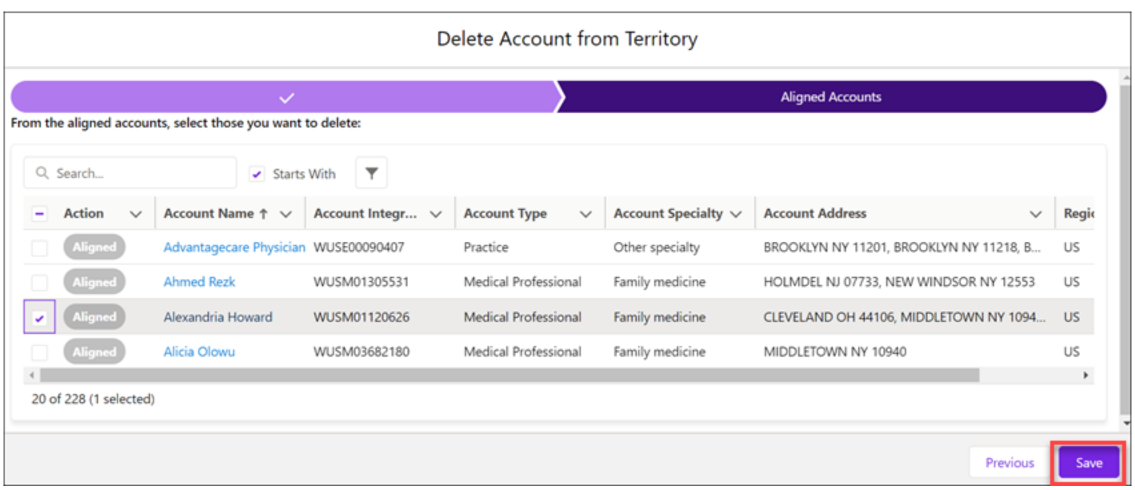
1. From the **Proposed Accounts** tab or the **Account Change Requests** tab, click **New Delete CR**.



2. Select the territory or multiple territories to delete accounts from, then click **Next**.

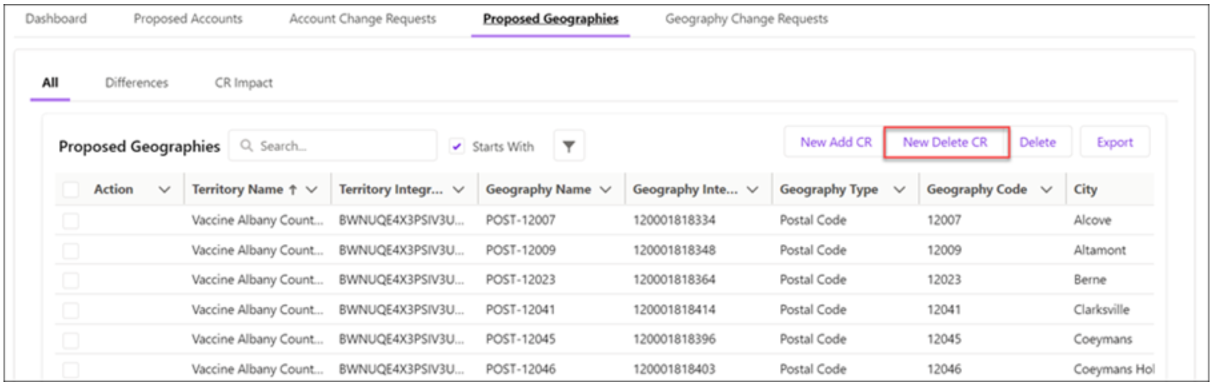


3. Select the aligned accounts you want to delete, then click **Save**.

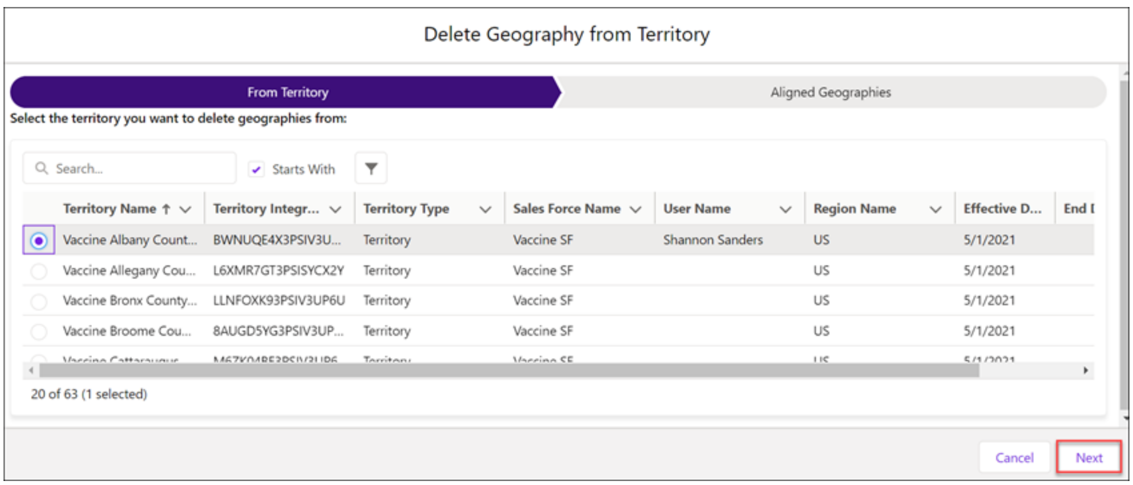


To delete geographies from the alignment:

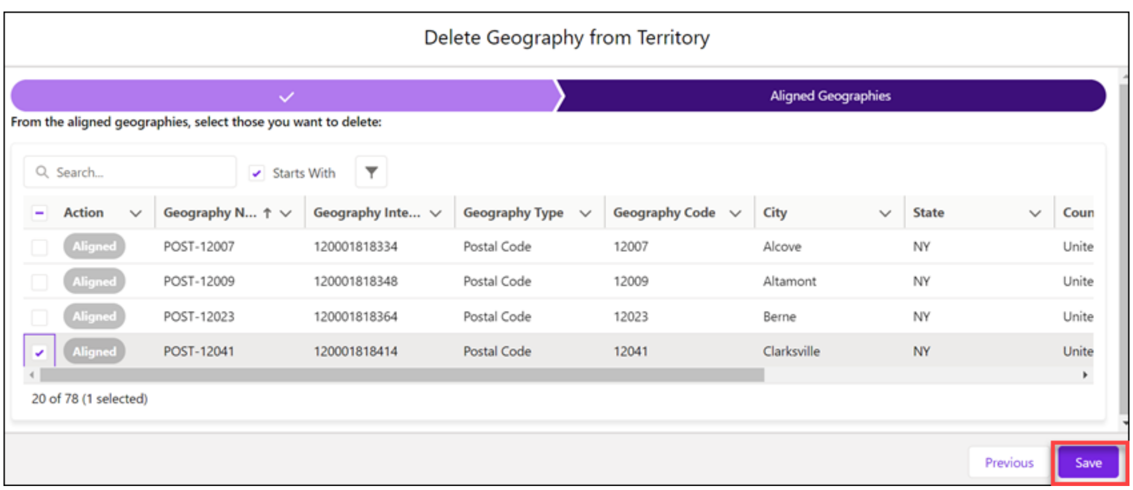
1. From the **Proposed Geographies** tab or the **Geography Change Requests** tab, click **New Delete CR**.



2. Select the territory or multiple territories to delete geographies from, then click **Next**.



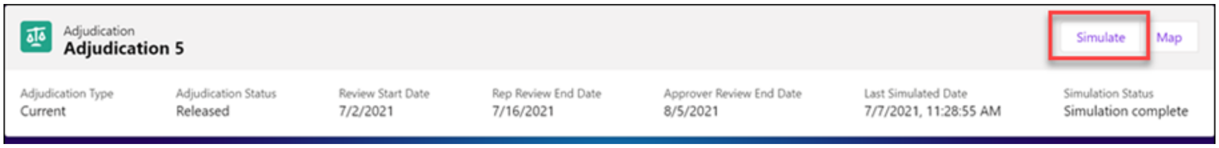
3. Select the geographies you want to delete, then click **Save**.



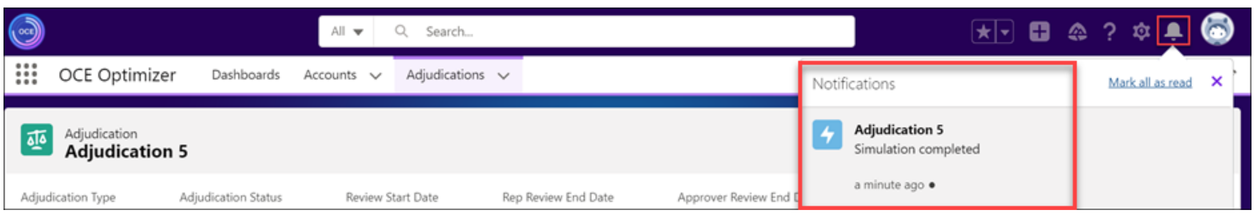
To simulate the account changes

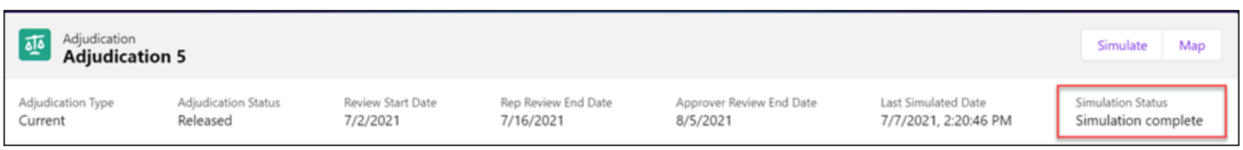
Simulate the changes you made to see the impact of your changes to your workload.

Click **Simulate**.



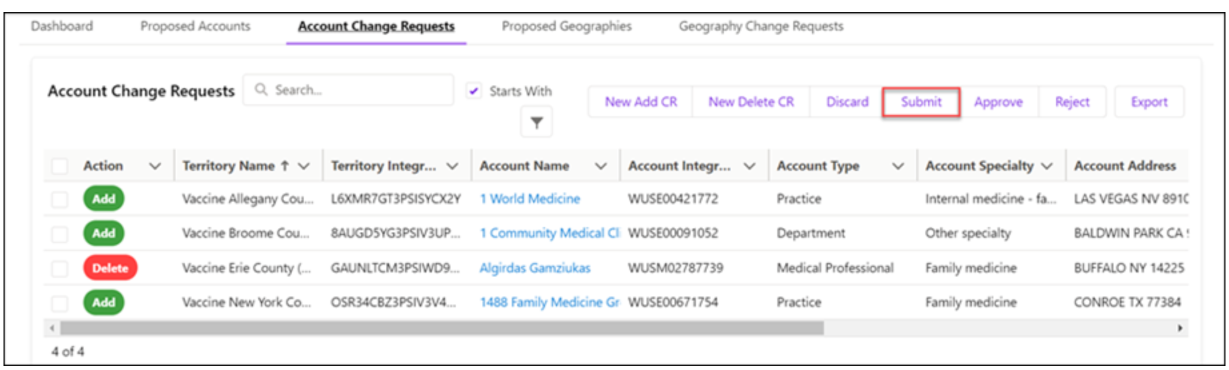
> **Note:** While the simulation processes, the **Simulate** button is inaccessible. After simulation, you receive a notification that the simulation is complete, and the **Simulation Status** changes to *Simulation Complete*.



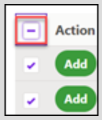


To submit adjudication changes

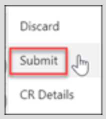
1. From the **Account Change Requests** or **Geography Change Requests** tabs, select the check box(es) next to the change request(s) you want to submit for approval, then click **Submit**.



Note: To select all change requests, select **Action** .

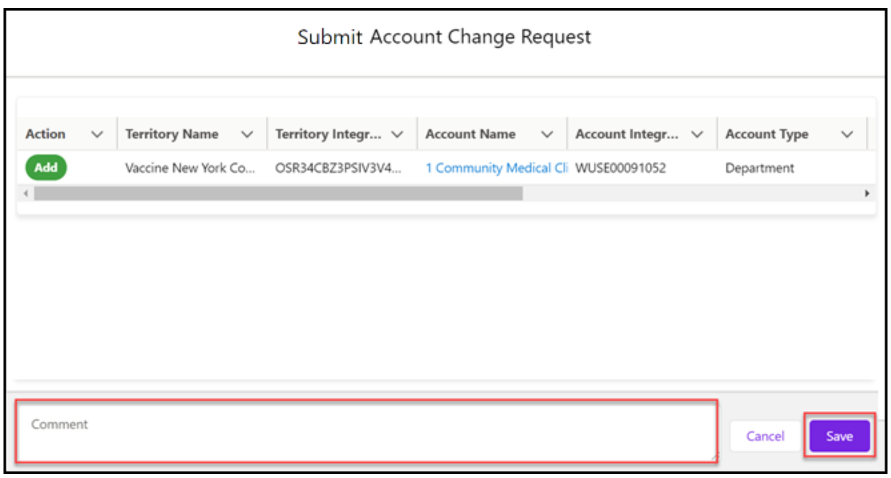


Alternatively, to submit individual change requests, click the drop-down for the change you want to submit, then select **Submit**.



2. Enter comments about the change request, if desired, then click **Save**.

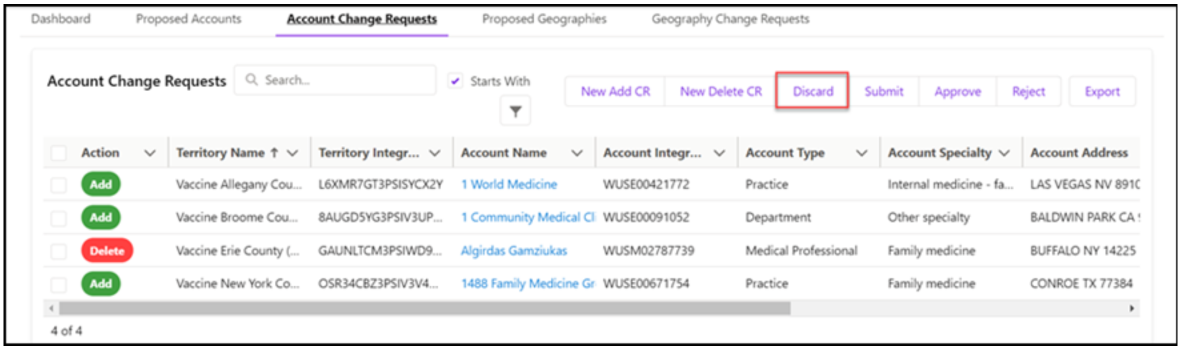
Note: If change requests are submitted in bulk, the same comment applies to each change request.



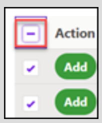
The **CR Status** changes to *Submitted* and the **CR Approval Status** to *Pending*.

To discard adjudication changes

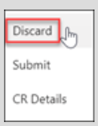
1. Click the check box(es) next to the change request(s) you want to discard, then click **Discard**.



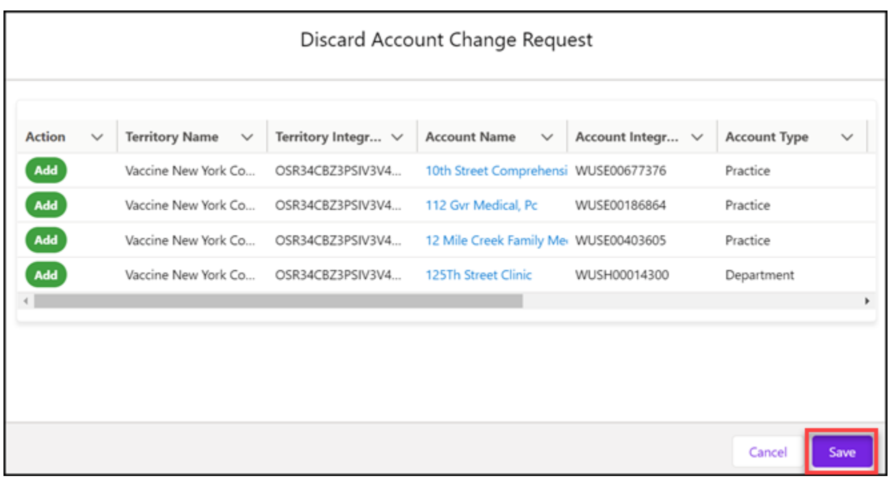
Note: To select all change requests, select **Action**.



Alternatively, to discard individual changes, click the drop-down for the change you want to remove, then click **Discard**.



2. Click **Save**.

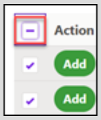


To approve the Rep's account and geography changes (DMs only)

Note: Change requests that are marked as automatically approved on submit by the HO user are already submitted and require no action against them.

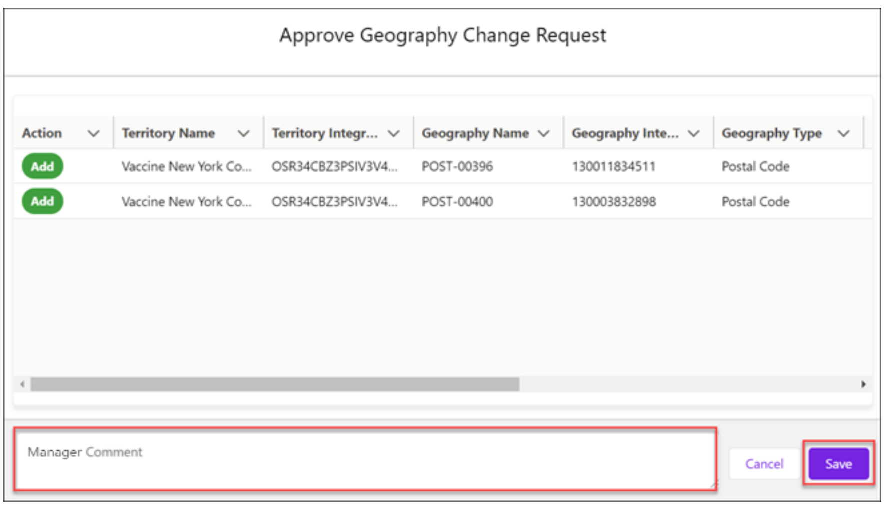
1. From the **Account Change Requests** or **Geography Change Requests** tabs, click the check box(es) next to the change request(s) you want to approve, then click **Approve**.

   Note: To select all change requests, select **Action**.

   Alternatively, to approve individual changes, click the drop-down  for the change you want to approve, then select **Approve**.

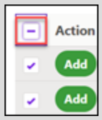


2. Enter comments about the approval, if desired, then click **Save**.

To reject the Rep's account and geography changes (DMs only)

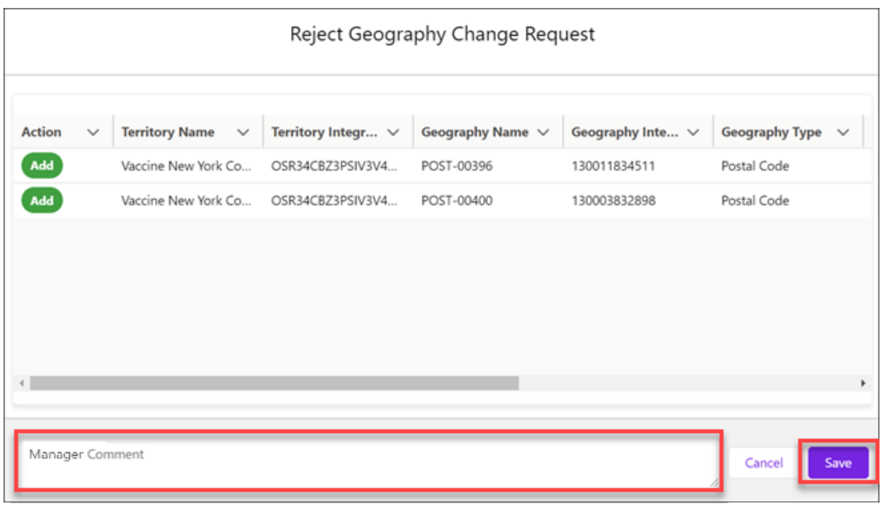
1. From the **Account Change Requests** or **Geography Change Requests** tabs, click the check box(es) next to the change request(s) you want to reject, then click **Reject**.

   Note: To select all change requests, select **Action**.

   Alternatively, to reject individual changes, click the drop-down  for the change you want to reject, then select **Reject**.

2. Enter comments about the rejection, if desired, then click **Save**.

Engagement Plan Process

Engagement planning lets you plan future customer engagements with varying assumptions on markets and customers to target the right customers on the right channels. In OCE Optimizer, Engagement Plans, often known as activity plans or call plans, define plan interaction channels (face-to-face, email, etc.) and frequency of contact with aligned customers.

HO Users Workflow

- HO users create a new engagement plan using the Scenarios module and set a future plan **Effective Date** and a plan **End Date**.
- Users create an Account Alignment Rule for the engagement plan and simulate the rule.
- Users add the engagement plan using the **Engagement Plans** tab within the new scenario.
  - Using an intuitive wizard, engagement plan details are defined, including channels and segments.
  - After the new engagement plan is simulated, the Engagement Plan Impact on the Scenario Summary screen shows a snapshot of the plan.
  - After viewing results, necessary changes can be made or the plan can be committed.
- HO users can create engagement plan adjudication cycles by defining the adjudication scope to include engagement plans.
- Allowed actions for territories and districts for engagement plan adjudications are defined, as are guard rails for allowed changes to channels.
- Summary screens show results before committing and after field feedback is received.

See:

- Create a New Scenario
- Add Account Alignment Rules or Account Product Restriction Rules to a Scenario
- Add an Engagement Plan Transaction to a Scenario
- Simulate a Scenario
- Create a New Adjudication
- Commit a Scenario

Reps, Managers Workflow

- Reps and managers can request engagement plan changes through adjudications that are approved/rejected by home office or managers.
- Both Reps and DMs can view and edit segment and call frequency and review original and updated values for them.
- Managers can view and edit plan related columns within the adjudication.

See:

- View Engagement Plans
- Create a New Adjudication
- View Adjudications (Reps, DMs)

View Engagement Plans

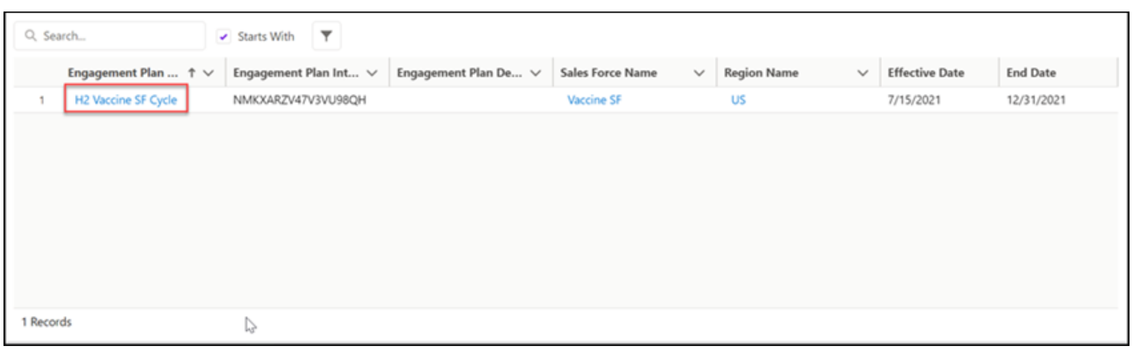
You can view all committed engagement plans via the **Engagement Plans** module. The **Engagement Plans** module displays general information about an engagement plan scenario, as well as calculation details and channel and segment information.

Engagement Plans are managed via the **Scenarios** module.

To access Engagement Plan Details

1. Click **Engagement Plans** from the primary navigation bar.
2. Select the engagement plan you would like to view.

> **Note:** Use the **Search** and **Filters** functions to help you locate the sales force. See Search and Filter Functions.



3. View the engagement plan information.

The Engagement Plan name and highlight section are displayed at the top of the Engagement Plan entity page for all the Engagement Plan tabs.

Highlight Section

- **Engagement Plan Name**: Name of the engagement plan.
- **Engagement Plan Integration Id**: Unique identification number of the engagement plan.
- **Sales Force Name**: The name of the sales force the engagement plan is aligned to.
- **Effective Date**: Indicates the date when the transactions within the engagement plan are active/valid.
- **End Date**: Indicates the date after which the scenario is no longer active/valid.
- **As Of Date**: The data displayed for the engagement plan is based on the date selected in this field.

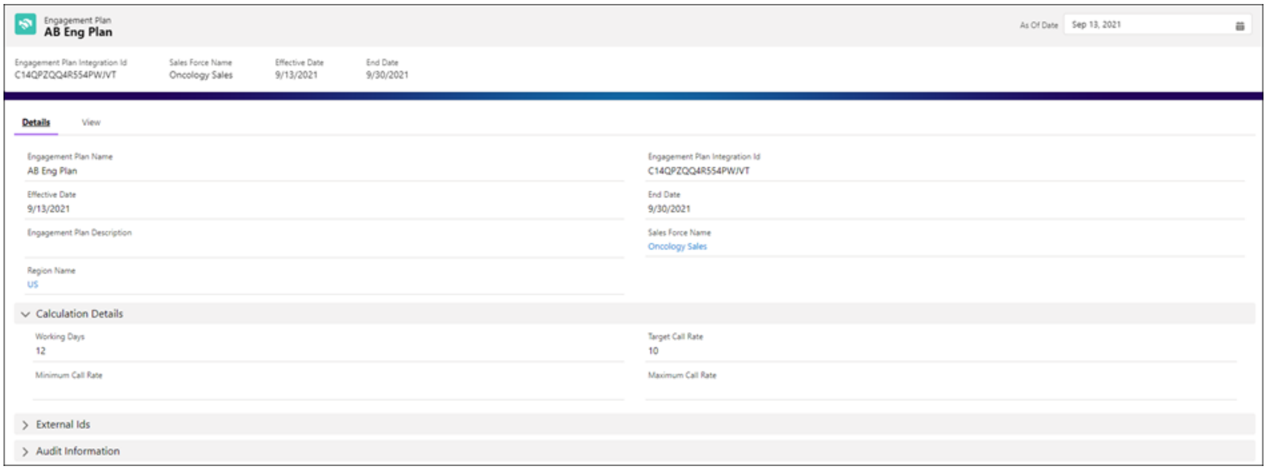
For details regarding the information displayed on each tab of the Engagement Plans screen, see:

- Engagement Plan Details Tab
- Engagement Plan View Tab

Engagement Plan Details Tab

The **Details** tab contains general information about the engagement plan, calculation details, external ids, and audit information.

General Information

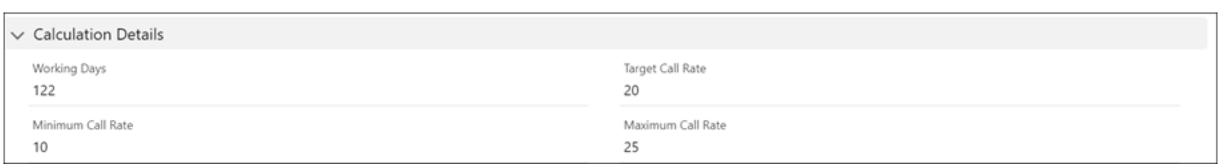


- **Engagement Plan Name**: Name of the engagement plan.
- **Engagement Plan Integration Id**: Unique identification number of the engagement plan.
- **Effective Date**: Indicates the date when the scenario is active/valid.

> **Note:** Engagement plan is calculated using the **Effective Date** and the days entered in the **Working Days** entry box.

- **End Date**: Indicates the date after which the scenario is no longer active/valid.
- **Engagement Plan Description**: Unique details about the engagement plan.
- **Sales Force Name**: The name of the sales force the engagement plan is aligned to.
- **Region Name**: The region the engagement plan is aligned to.

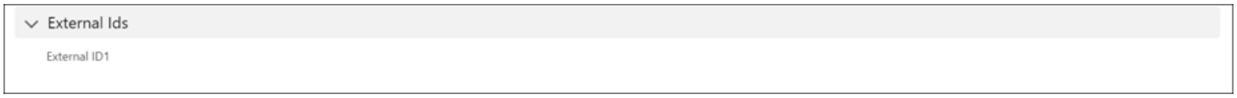
Calculation Details



- **Working Days**: Number of actual working days. The engagement plan is calculated as number of days from the scenario **Effective Date** minus the holidays from the region's company calendar.
- **Target Call Rate**: The targeted number of calls for this engagement plan.

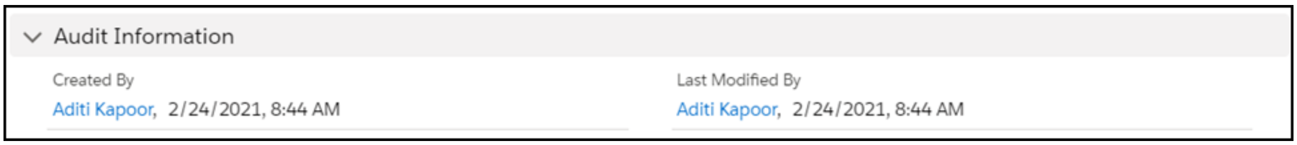
- **Minimum Call Rate**: The minimum number of calls for this engagement plan.
- **Maximum Call Rate**: The maximum number of calls for this engagement plan.

External Ids



- **External ID1**: Additional identification number(s) for cross referencing.

Audit Information

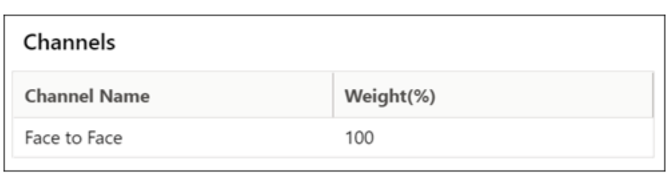


- **Created By**: A combination of the creator's user name and the date/time the engagement plan was created.
- **Last Modified By**: A combination of the user name of the last person to edit the engagement plan and the date/time it was updated.

Engagement Plan View Tab

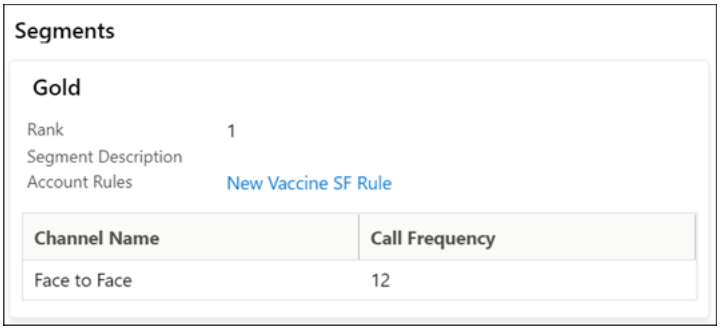
The **View** tab contains information about the channels and segments related to the engagement plan.

Channels



- **Channel Name**: Name of the channel associated with the engagement plan.
- **Weight (%)**: The percentage of the importance of the channel. The weight across all channels must equal 100%. For example, if only one channel exists, the weight is 100%. If you have three channels for the engagement plan, the first could be 50% and the second and third each 25%.

Segments



- **Segment Name**: The segment name, which differentiates segment tiers.
- **Rank**: The system-generated, read-only rank of the segment that is calculated based on the order that segments are added.
- **Segment Description**: A description that helps define the segment.
- **Account Rules**: The account rule that applies to the segment.
- **Channel Name**: The channel that applies to the segment.
- **Call Frequency**: The number of contact calls for the segment.

View System Health

The **System Health** module displays active rules that do not align any accounts or that do not have any territories impacted to help you determine whether a rule needs to be updated or end dated so it does not impact the governor limits.

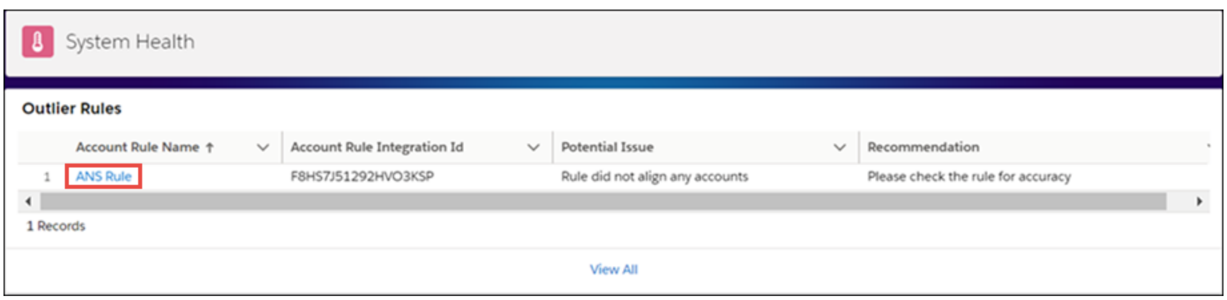
For example, Rule A has been active since 1/1/2020 and has aligned at least one account through 8/30/2020. On 9/1/2020, the rule no longer has any accounts being aligned or territories that are active. In the grid, there would be two potential issues and recommendations listed for Rule A.

Potential Issue	Recommendation
The rule did not align any accounts.	Please check the rule for accuracy.
There are no active or future dated territories for sales force.	Please consider end dating the account alignment rule.

The issue displays in the **System Health** module until it is resolved.

To view system issues and recommendations

1. Click **System Health** from the primary navigation bar.
2. Find the rule and view the issue and recommendation.



- **Account Rule Name**: Name of the rule.
- **Account Rule Integration ID**: Unique rule identification number.
- **Potential Issue**: Problem with the current rule.
- **Recommendation**: Solution to the issue.

Manage Scenarios

A Scenario is a logical grouping of transactions with a single effective date and end date. Using the **Scenarios** module, home office users can manage transactions as a single scenario. This means you can make any needed updates in one place and ensure that all corresponding transactions are automatically updated.

Managing data using scenarios is useful for day-to-day operational tasks, such as moving geography alignment, and for major business changes, such as new product approval, annual alignments, and upsizing or downsizing of field force.

Scenarios enable you to:

- Logically group transactions, so either all or none are applied.
- Easily react to delivery date changes by updating the effective-end date for all the transactions within the scenario.
- Perform what-if analysis in production. Simulate and review results and tweak as necessary before committing.
- Review territory level impact analysis reports as check points to ensure desired outcome is achieved.

> **Important:** If you receive a message that **Governor Limits** have been reached, contact the Product owner immediately.

See:

- View Scenario Information
- Scenario Creation
- Add Transactions and Rules
- Import Scenario Data Using CSV Files
- Modify Transactions and Rules and Update Effective and End Dates
- Manage Transactions Using Maps
- Copy a Rule in a Scenario
- Copy an Engagement Plan in a Scenario

- [Move a Transaction from One Territory to Another]
- [Delete a Transaction or Rule from a Scenario]
- [Simulate a Scenario]
- [Commit a Scenario]

View Scenario Information

The **Scenarios** module displays general information about a scenario and a list of available transactions that can be managed within a scenario.

To access Scenario Details

1. Click **Scenarios** from the primary navigation bar.
2. Select the scenario you would like to view.
3. View the scenario's information.

   The Scenario Name and the Scenario highlight section are displayed on the top of the Scenario entity page for all the Scenario tabs.

   Highlight Section

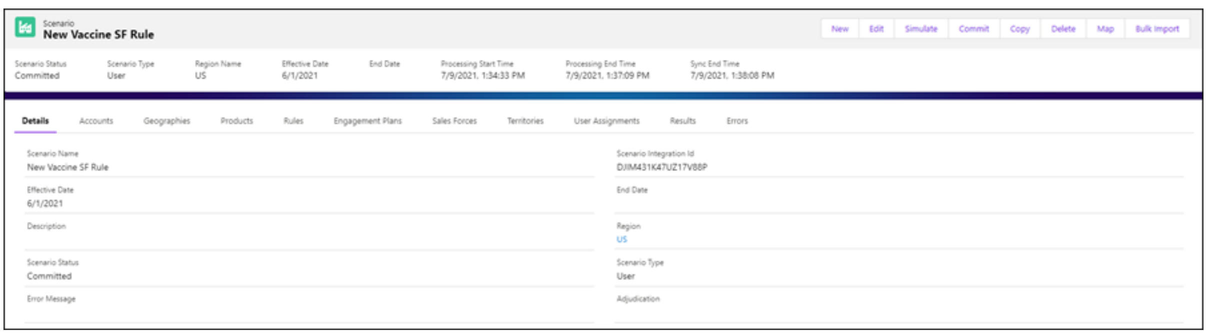
   - **Scenario Name**: Name of the scenario.
   - **Scenario Status**: The scenario processing status, including *Pending* (newly created), *Simulating, Simulated*, *Committing*, *Committed*.
   - **Scenario Type**: Type of scenario; *User* (created by user via scenario), *Internal* (created by user via user assignment from User entity page), *System* (created by API user).
   - **Region Name**: Optional; the region the scenario is linked to.

     Note: If you have access to multiple regions and you only want to create transactions for a specific region, select a region to filter the data available based on the selected scenario region.

- **Effective Date**: Indicates the date when the transactions within the scenario are active/valid.

> **Note:** If you are creating a scenario for an engagement plan, the **Effective Date** must be a future date.

- **End Date**: Indicates the date after which the transactions within the scenario are no longer active/valid. Make sure to populate this field if you want to set or update the end date for any of the transactions via the **Update End Date** action.
- **Processing Start Time**: The processing start time of the scenario.
- **Processing End Time**: The processing end time of the scenario.
- **Sync End Time**: The time the sync is completed, and data is available outside of the scenario.

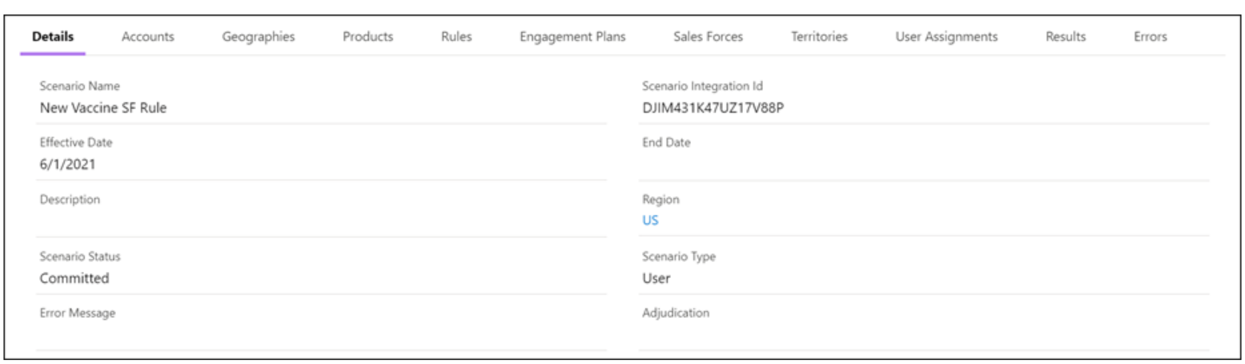


For details regarding the information displayed in the **Details** tab, see Scenario Details Tab.

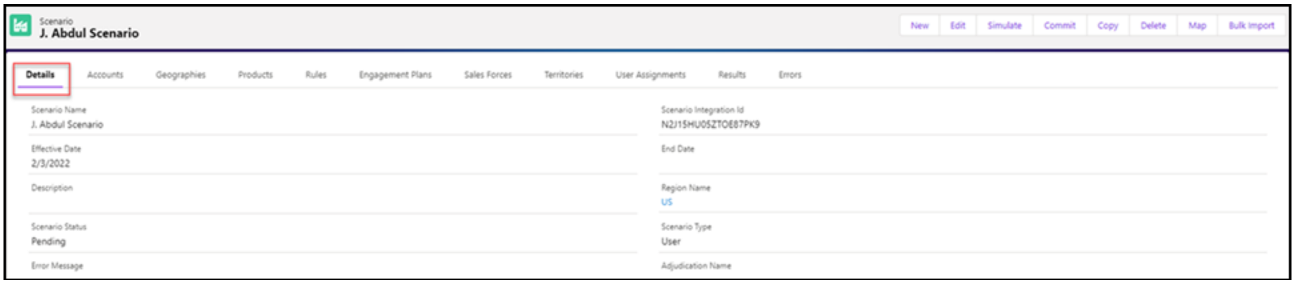
Scenario Details Tab

The Scenario Details page displays general information for a specific scenario, audit information, and an overview section that lists available transactions you can perform against the scenario.

Scenario Details

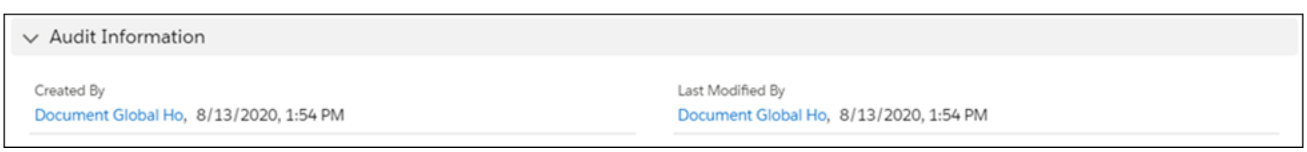


General Information



- **Scenario Name**: Name of the scenario.
- **Scenario Integration ID**: Unique identification number of the scenario.
- **Effective Date**: Indicates the date when the transactions within the scenario are active/valid.
- **End Date**: Indicates the date after which the transactions within the scenario are no longer active/valid.
- **Description**: Details about the scenario.
- **Region**: The region the scenario is linked to, if applicable.
- **Scenario Status**: The scenario processing status, *Pending* (newly created), *Simulating, Simulated, Committing, Committed*.
- **Scenario Type**: Type of scenario; *User* (created by user via scenario), *Internal* (created by user via user assignment from User entity page), *System* (created by API user).
- **Error Message**: Displays error messages pertaining to the scenario, if applicable.
- **Adjudication**: Displays the adjudication, if any, attached to the scenario.

Audit Information

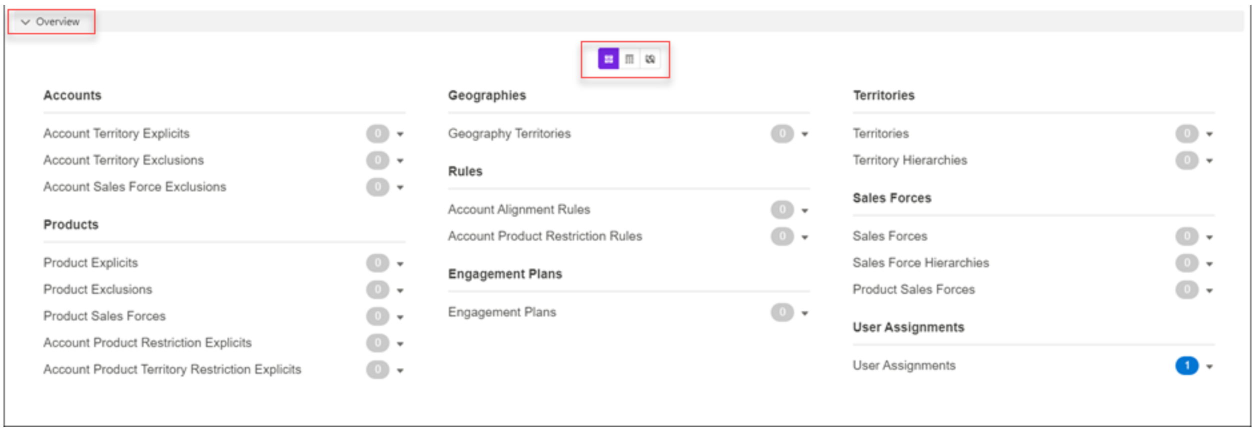


- **Created By**: A combination of the creator's user name and the date/time the scenario was created.
- **Last Modified By**: A combination of the user name of the last person to edit the scenario and the date/time it was updated.

Overview

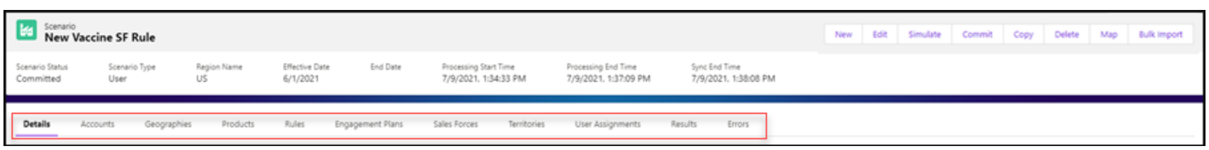
The **Overview** section contains a list of available transactions that you can enter into the scenario.

> **Note:** If the scenario has related OMScenarioProducts records, a **Product** row appears in the **Overview** section under **Products**.



The Overview section display defaults to the Cards view. Click **List** to change the display to List view or click **Map** for Map view.

Alternatively, you can enter transactions into the scenario by selecting the appropriate transaction tab.



Scenario Creation

For each new scenario, you can enter general information for the scenario (such as a description of the scenario) and the effective and end dates of the scenario. After the scenario is created, you can add transactions and rules to it.

See:

- Create a New Scenario
- Modify a Scenario
- Simulate a Scenario

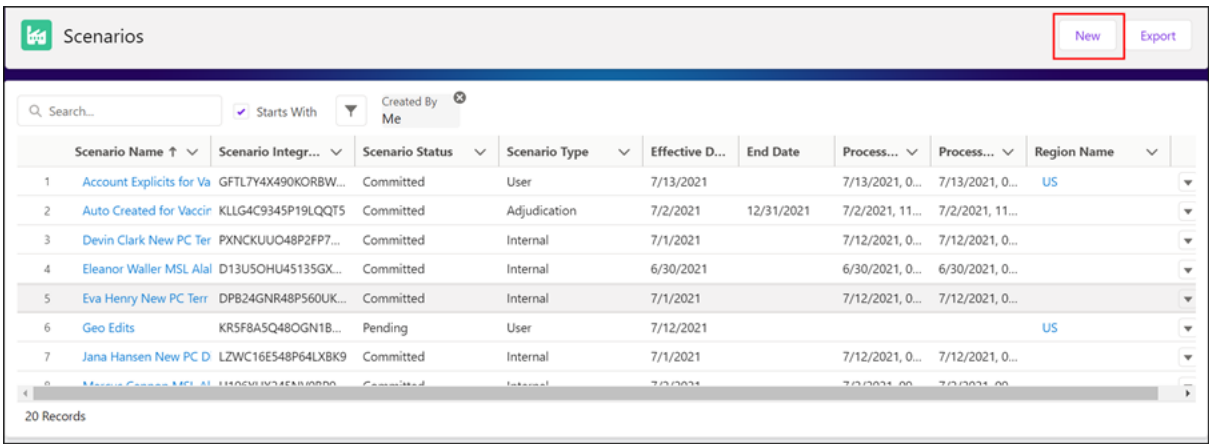
- Commit a Scenario
- Copy a Scenario
- Delete a Scenario

Create a New Scenario

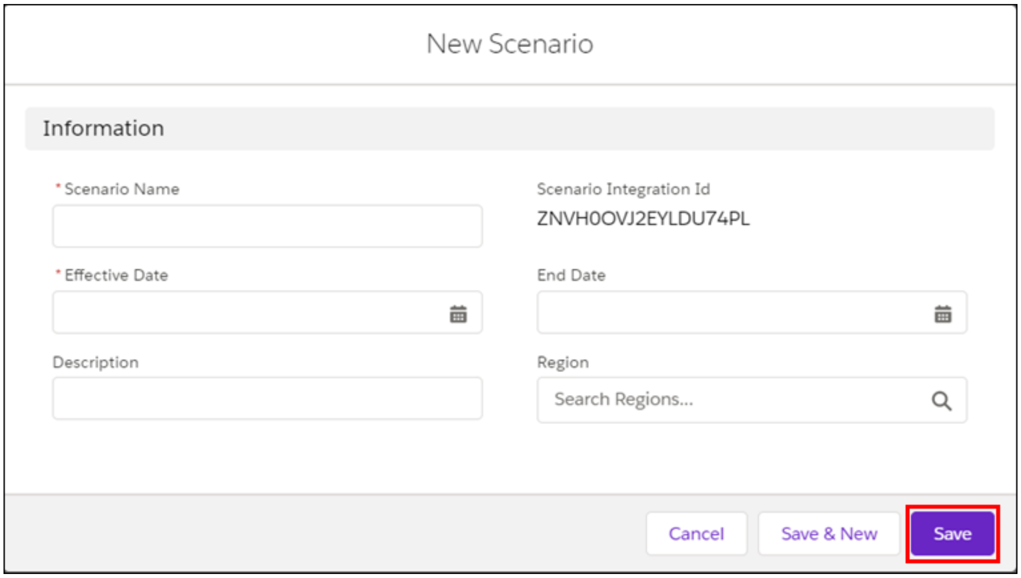
You can create a scenario and add transactions to it.

To create a new scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, click **New**.



3. Enter scenario information and click **Save**.



For information about the fields, see [View Scenario Information](#).

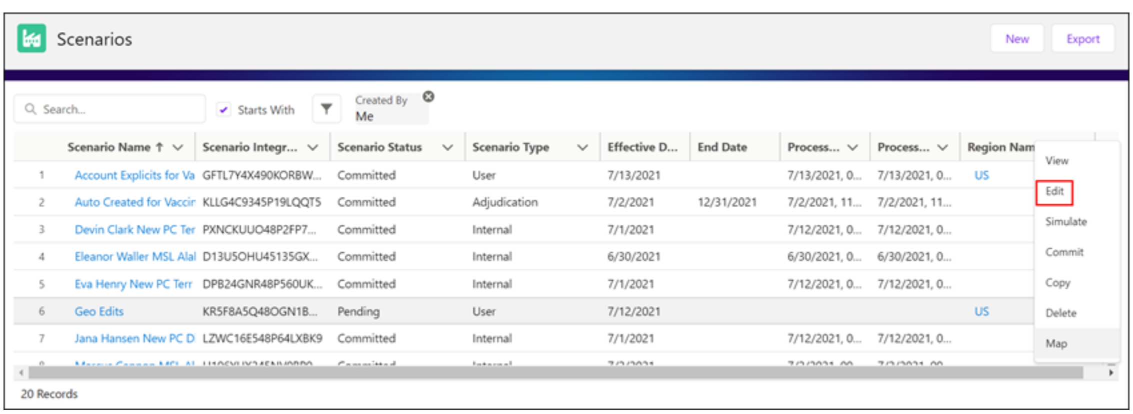
Modify a Scenario

You can make updates to a scenario you created.

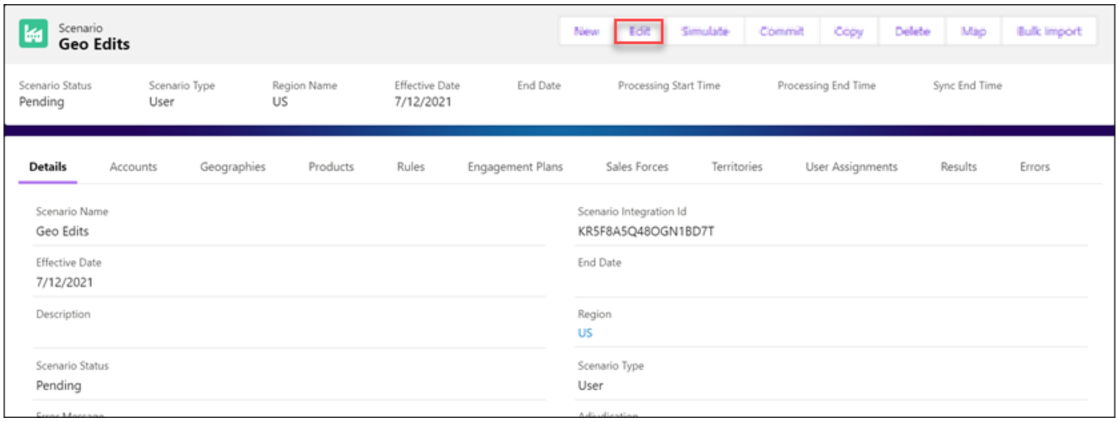
> **Note:** You can only edit a scenario if it has not been committed. You cannot edit a scenario while the simulation is processing.

To edit a scenario

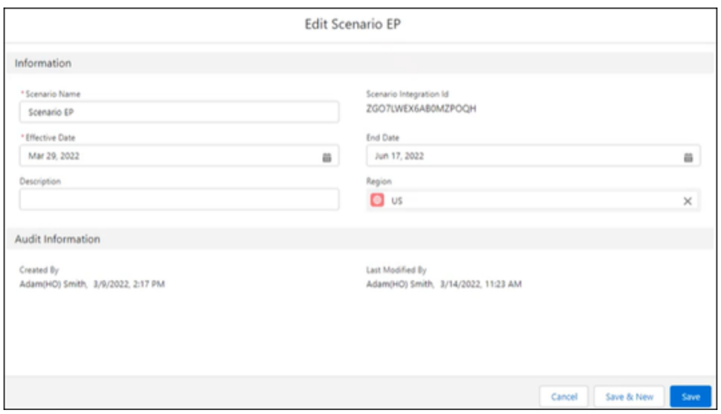
1. Click **Scenarios** from the primary navigation bar.
2. After you find the scenario, do one of the following:
   - Click the drop-down for the scenario you want to edit and select **Edit**.



- Click the name of the scenario to go to the Scenario Details page, and then click **Edit**.



3. Modify the scenario information and click **Save**.



Note: If the effective and end dates of a scenario that includes an engagement plan are updated, the effective and end dates of the attached adjudication are automatically updated.

You cannot modify the effective and end dates of a scenario containing a released adjudication.

For information about the fields, see View Scenario Information.

Copy a Scenario

Copying a scenario is useful when performing what-if analysis to review more than one option to see which one makes the most sense before committing to one. The copied scenario gives you a starting point so you don't have to start from scratch.

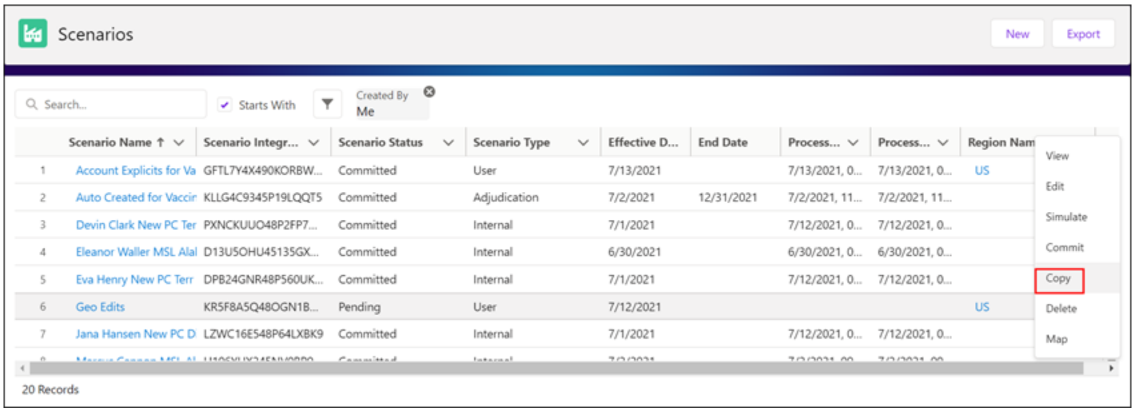
You can copy active/pending and simulated scenarios.

To copy a scenario

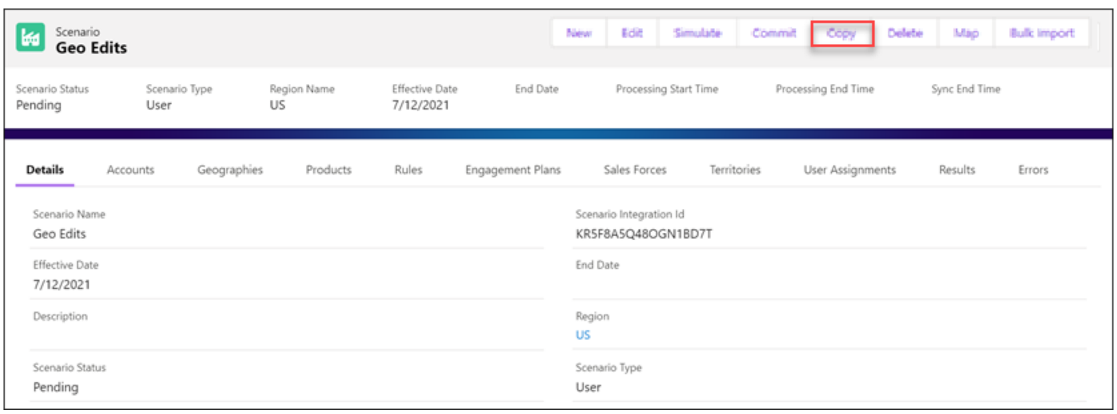
1. Click **Scenarios** from the primary navigation bar.

2. From the Scenarios screen, do one of the following:

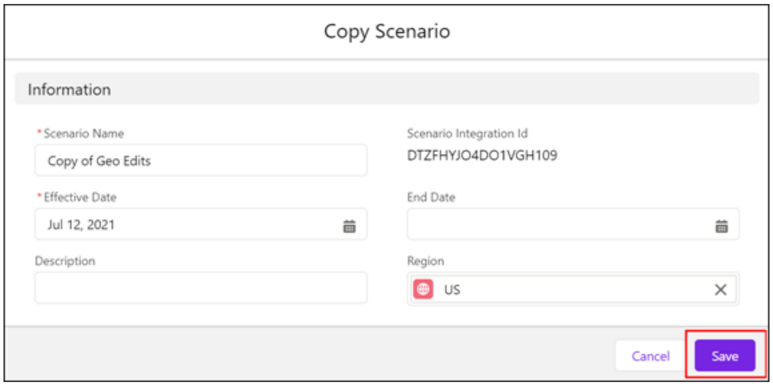
    - Click the drop-down for the scenario you want to copy and select **Copy**.



    - Click the name of the scenario to go to the Scenario Details page, then click **Copy**.



3. Enter information for the new scenario, then click **Save**.



The scenario is created. You can now add and edit transactions.

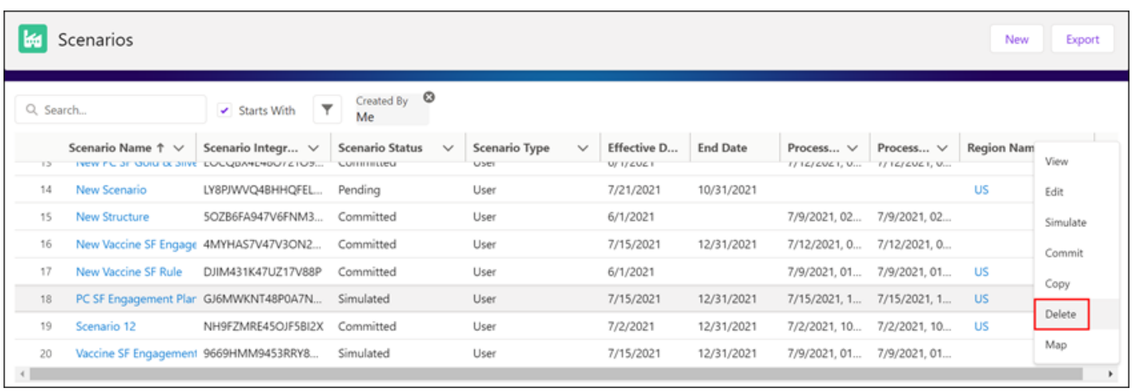
Delete a Scenario

You can delete a scenario if the status is *Pending*, *Simulated*, or *Error* so it is no longer active/valid.

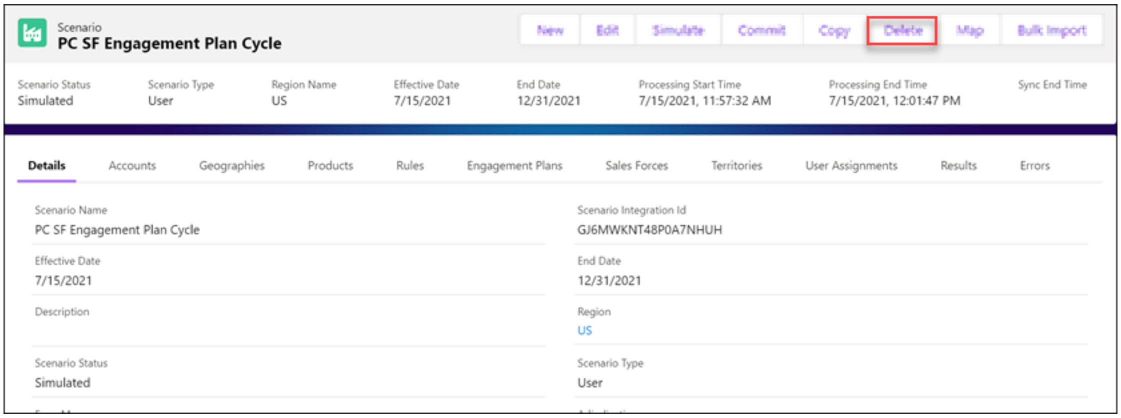
> **Note:** If you delete a scenario that is linked to an adjudication, the field change requests will be discarded.

To delete a scenario

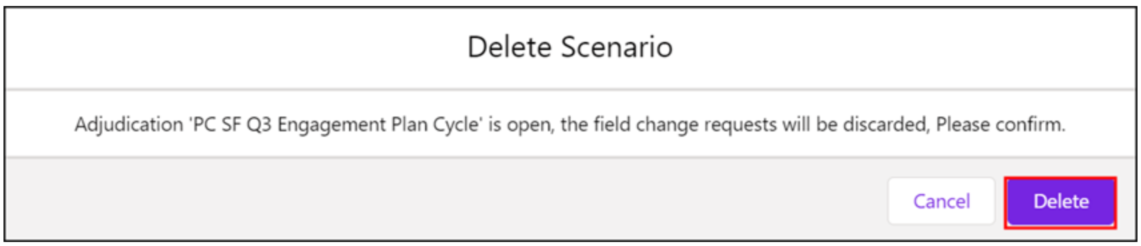
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, do one of the following:
   - Click the drop-down for the scenario you want to end date and select **Delete**.



- Click the name of the scenario to go to the Scenario Details page, and then click **Delete**.



3. Click **Delete** to confirm.



Add Transactions and Rules

After you create a scenario, you can add transactions and rules to it, such as Account Alignments, Geography Alignments, Product Alignments, Engagement Plan Alignments, Sales Forces, Territories, User Assignments, and Account Alignment Rules.

For more information, see:

- Add Account Alignment Rules or Account Product Restriction Rules to a Scenario
- Add an Account Alignment Transaction to a Scenario
- Add a Geography Alignment Transaction to a Scenario
- Add a Product Alignment Transaction to a Scenario
- Add an Engagement Plan Transaction to a Scenario
- Add a Sales Force Transaction to a Scenario
- Add a Territory Transaction to a Scenario
- Add a User Assignment to a Scenario

Add Account Alignment Rules or Account Product Restriction Rules to a Scenario

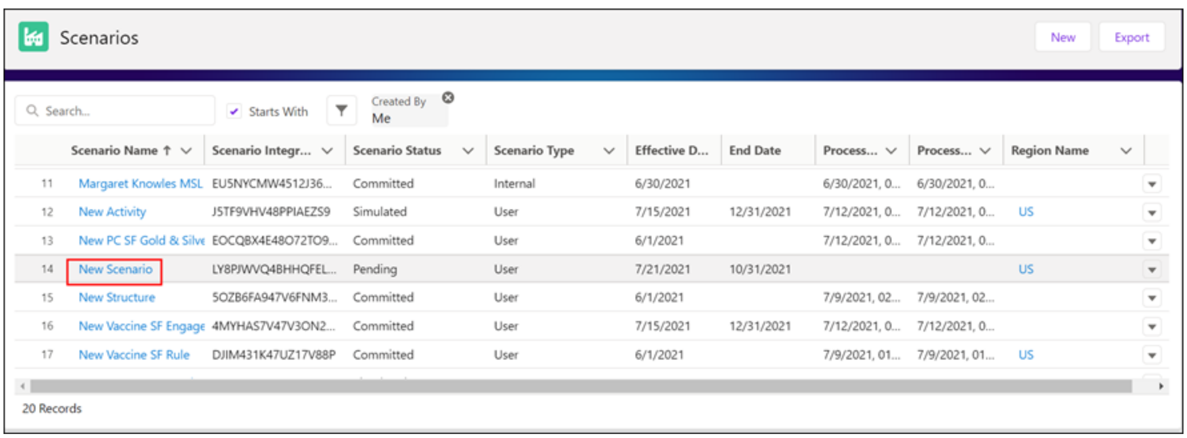
You can define Account Alignment Rules for a specific sales force for past, current, or future effective dates. These rules specify which accounts should be dynamically aligned to the sales force. The System Administrator's configuration can include any account attribute, including custom attributes. After they're configured, these additional attributes are leveraged by the HO user in the dynamic alignment rules.

Account Product Restriction Rules specify which account/product combinations should be restricted on the CRM call page or other similar functionality in CRM. For example, certain products should not be detailed to Pediatricians.

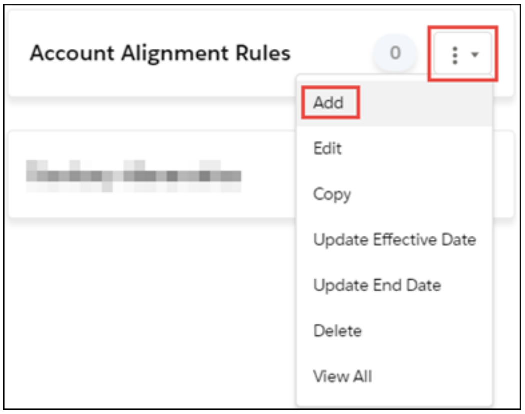
You can set multiple account alignment rules for a sales force.

To add an account alignment rule to a scenario

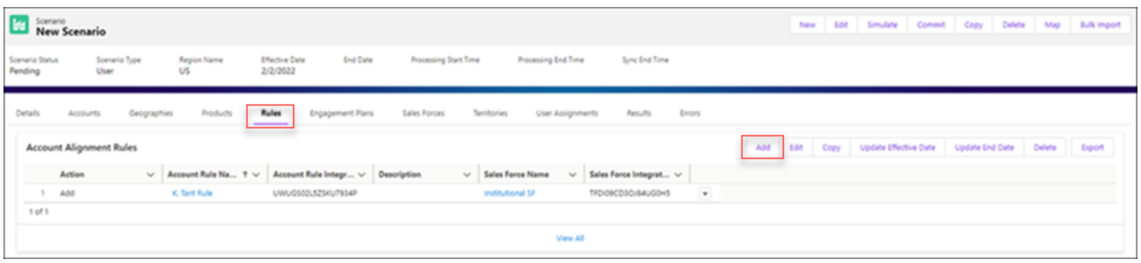
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario to which you want to add an account alignment rule.



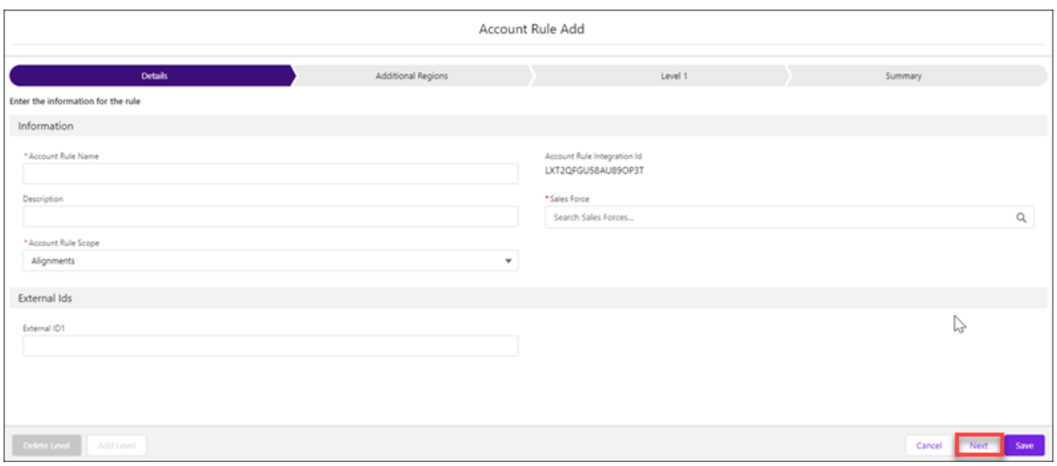
3. Do one of the following:
   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **Account Alignment Rules**, then select **Add**.



- Click the **Rules** tab and select **Add** for Account Alignment Rules.



4. Enter general information for the rule, then click **Next**.



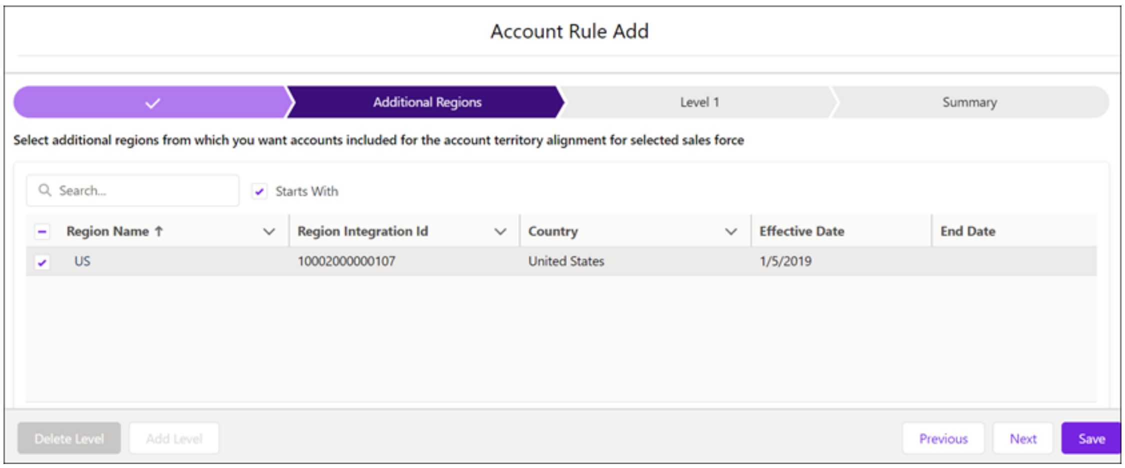
- **Account Rule Name**: Name of the rule.
- **Description**: Details of the rule.
- **Sales Force**: The sales force the rule applies to.

- **Account Rule Scope**: If the rule is for aligning a sales force, select *Alignments*. If the rule is for an engagement plan, select *Engagement Plan* or *Alignments + Engagement Plan*.

> **Note:** Engagement plan options are available only if the HO user has access to Engagement Plan Management.

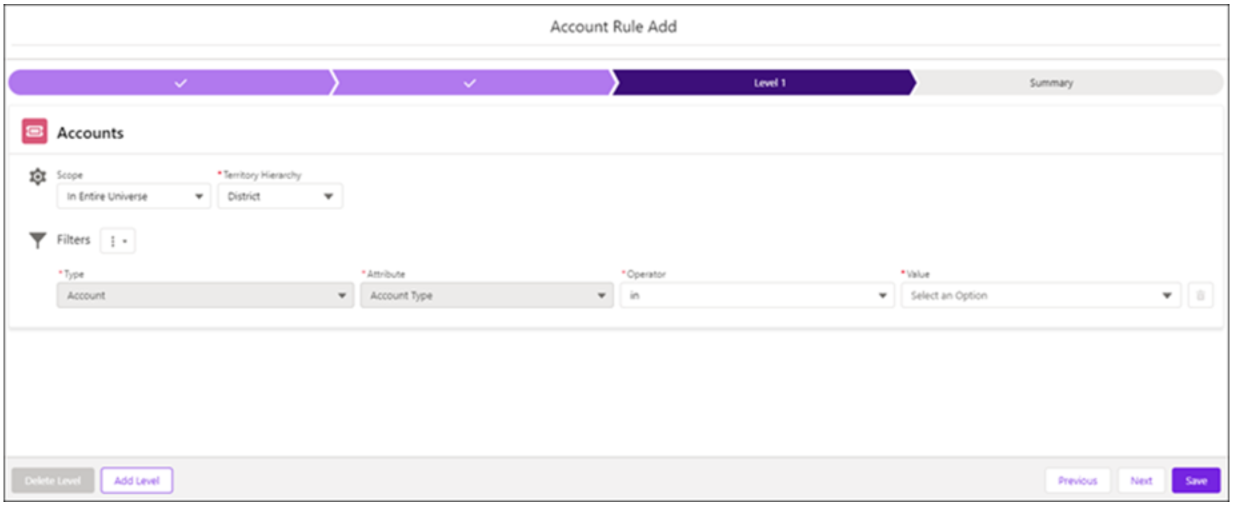
- **External ID**: An additional identification number for cross referencing.

5. Select other regions from which you want accounts included for the account territory alignment for the selected sales force, if applicable, then click **Next**.



- **Region Name**: Name of the region.
- **Region Integration Id**: Unique region identification number.
- **Country**: The country in which the region resides.
- **Effective Date**: Indicates the date when the region is active/valid.
- **End Date**: Indicates the date after which the region is no longer active/valid.

6. Enter the details of the rule and click **Save** if you're not entering groups or conditions. If you're entering groups and/or conditions, click **Next**.



- **Scope**: Select the scope of the accounts involved in the rule, such as *In Geography*, *Explicitly Aligned*, or *In Entire Universe*.
- **Territory Hierarchy**: Select the hierarchy level.

  Note: This field is only available if the **Scope** is *Entire Universe*.

- **Type**: Select the type of rule, such as *Account* or *Rating*.
- **Attribute**: Select the attribute of the type, such as *Account Type*, *Individual Types*, *Organization Types*, *Professional Title*, or *Specialty*.
- **Operator**: Select an operator to indicate what you want to do with the values, such as =, <>, *in*, or *not in*.

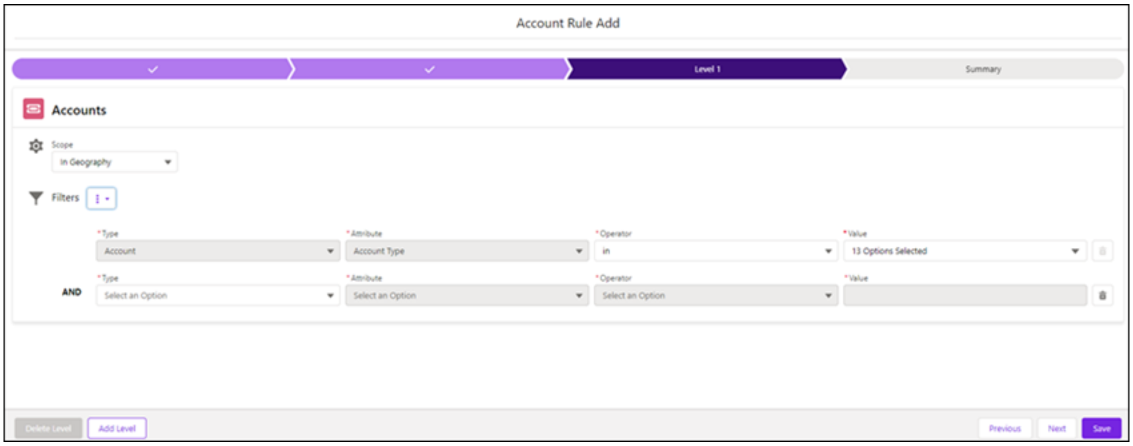
  Note: To set up a check box attribute, in the **Operator** field, select **=**. In the **Value** field, select **True** for checked or **False** for unchecked.

  Note: If you want to select more than one value, select the *In* operator before you start selecting values. The *In* operator makes multi-select possible.

- **Value**: Select a value, such as *Business Contact*, *Department*, *Medical Professional*, *Pharmacy*, or *Wholesaler*.

7. If applicable, enter groups or conditions to the rule, then click **Next** if you're not adding levels. If you're adding levels, continue to the next step.

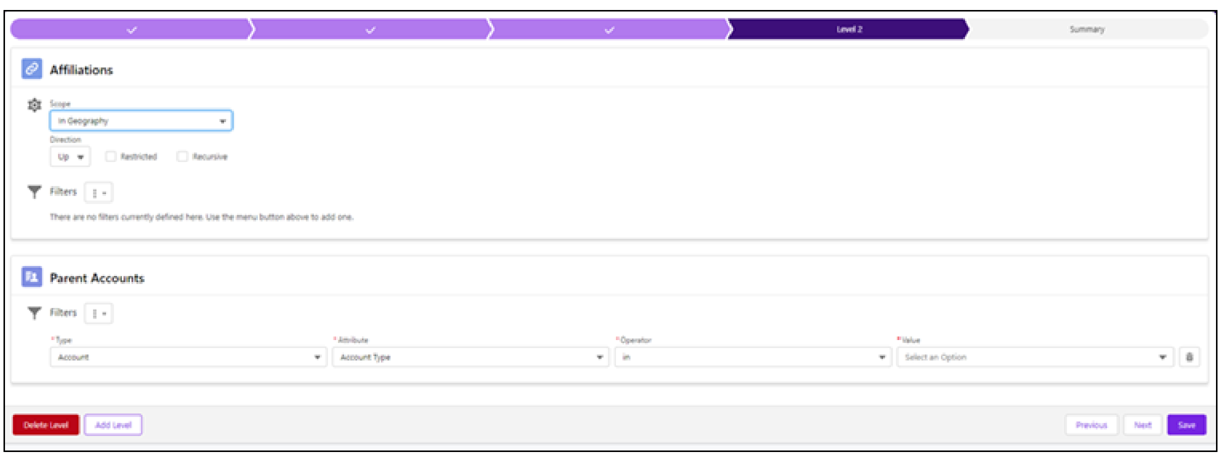
- Click **Add Conditions** to include additional filter attributes.
- Click **Add Group** to add filter attributes and combine as *and* or *or* by selecting *Any Condition is Met* or *All Conditions are Met*.



  - Select the **Filters** drop-down and select **Add Group** or **Add Condition**.
  - Select the **Type**, **Attribute**, **Operator**, and **Value** for the group or condition.

8. If applicable, to add a level to the rule, click **Add Level** (affiliation-based rule).

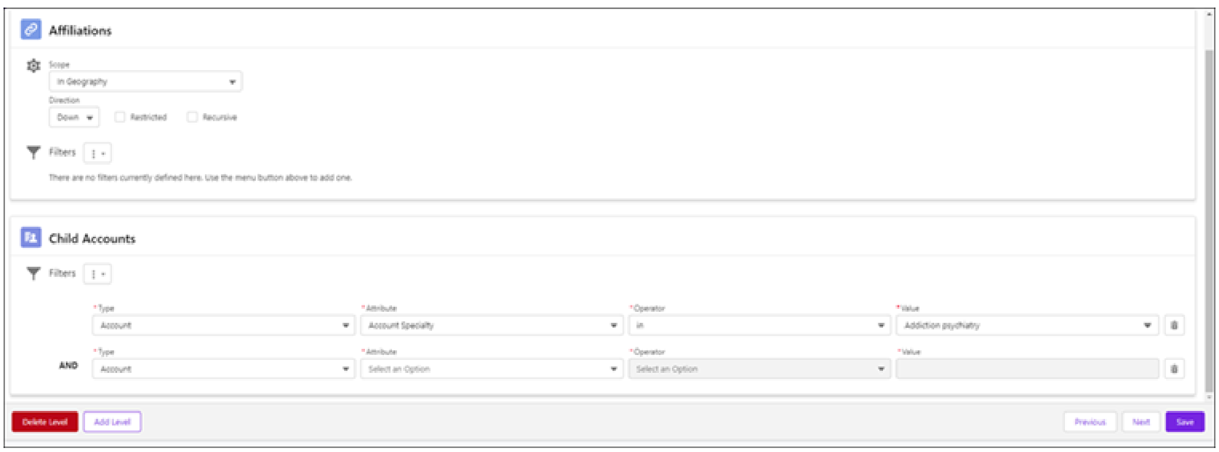
   To add a Parent Account



- From the **Source** drop-down, select *In Geography* to limit this affiliation to a geography, or select *In Entire Universe*.

- Select **Up** as the Direction.
    - Select **Restricted** if the conditions for the parent account must be met to align the account.
    - Select **Recursive** to have the alignment engine evaluate the affiliation for each iteration of the parent affiliation hierarchy.
- Add an affiliation or address-based filters, such as *Affiliation Role* or *Affiliation Specialty*.
- In the **Parent Accounts** section, from the **Filters** drop-down, select *Add Group* or *Add Condition*.
- Select the **Type**, **Attribute**, **Operator**, and **Value** for the group or condition.

To add a Child Account

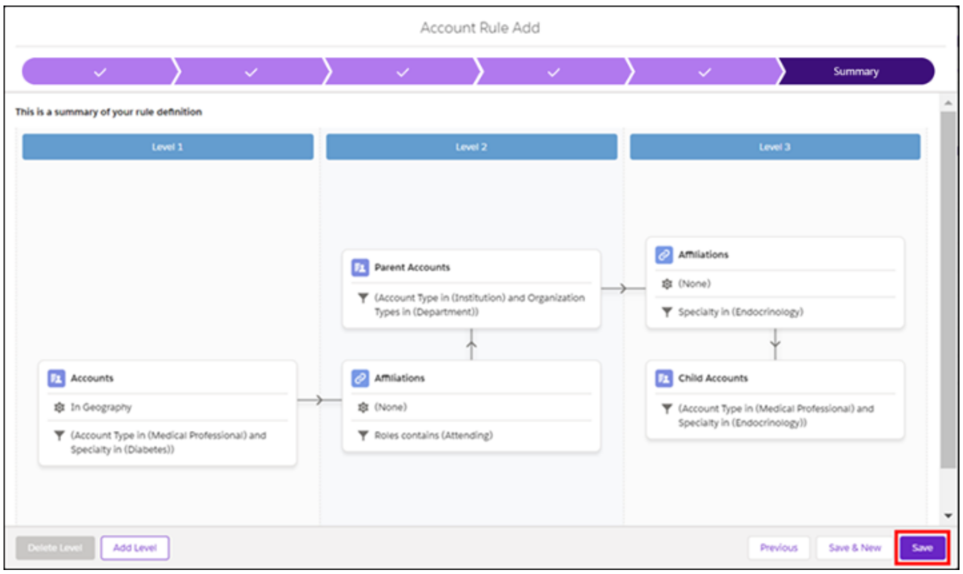


- From the **Source** drop-down, select *In Geography* to limit this affiliation to a geography, or select *In Entire Universe*.
- Select **Down** as the **Direction**.
    - Select **Restricted** if the conditions for the child account must be met to align the account.
    - Select **Recursive** to have the alignment engine evaluate the affiliation for each iteration of the child affiliation hierarchy.

- Add an affiliation or address-based filters, such as *Affiliation Role* or *Affiliation Specialty*.
- In the **Child Accounts** section, from the **Filters** drop-down, select *Add Group* or *Add Condition*.
- Select the **Type**, **Attribute**, **Operator**, and **Value** for the group or condition.

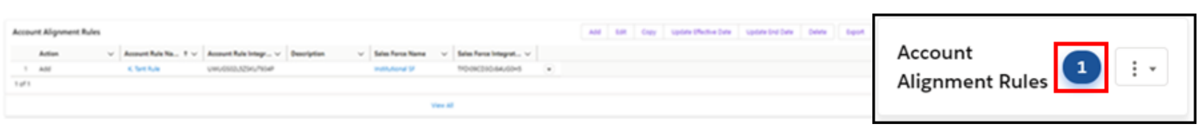
9. After you add levels to the rule, click **Next**.

   A visual representation of your rule in natural sentence form is displayed so you can validate that the rule definition is correct.



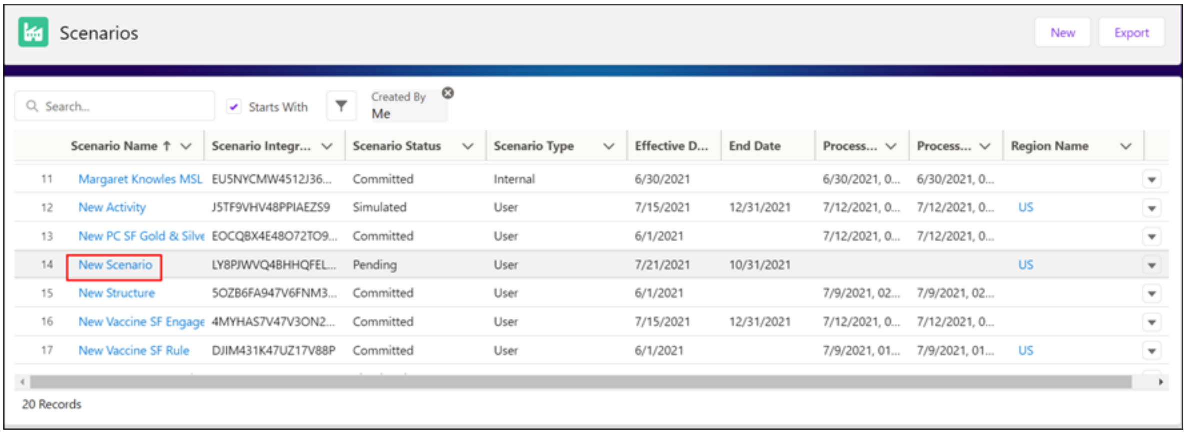
10. Click **Save**.

    The rule is added to the **Account Alignment Rules** section in the **Rules** tab and is indicated on the transaction card in the **Overview** section of the **Details** tab.



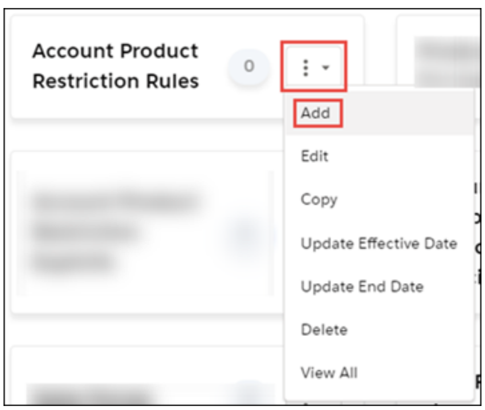
To add an account product restriction rule to a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add an account product restriction rule to.

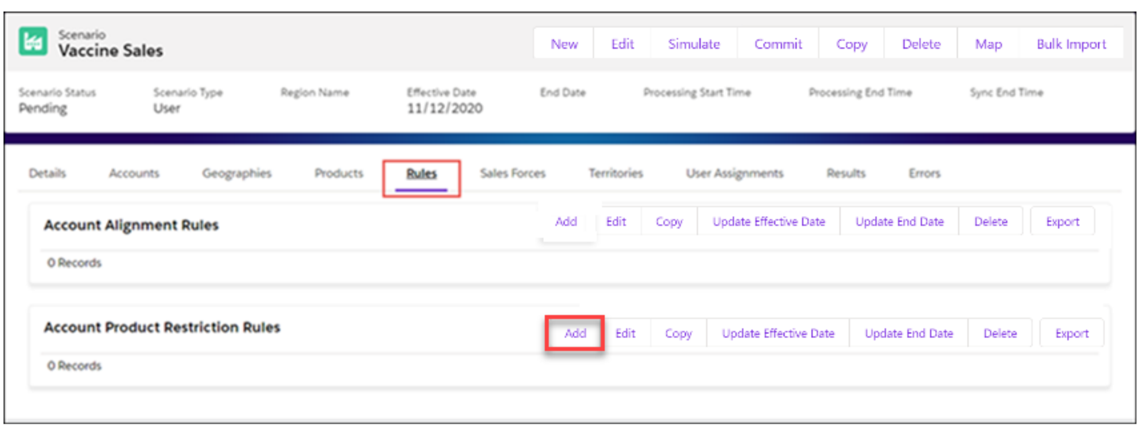


3. Do one of the following:

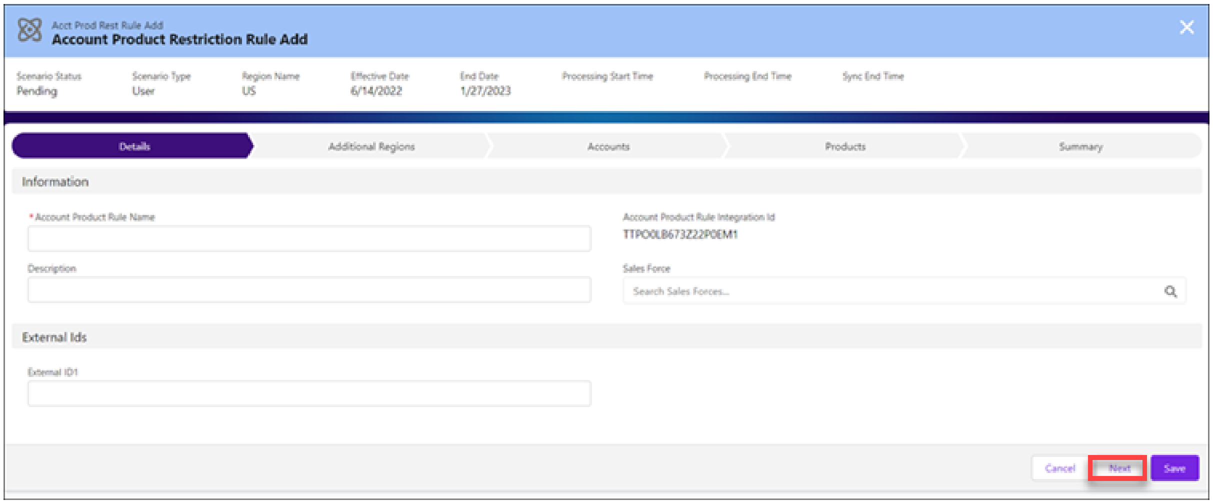
- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **Account Product Restriction Rules**, then select **Add**.



- Click the **Rules** tab and select **Add** for Account Product Restriction Rules.



4. Enter general information for the rule, then click **Next**.



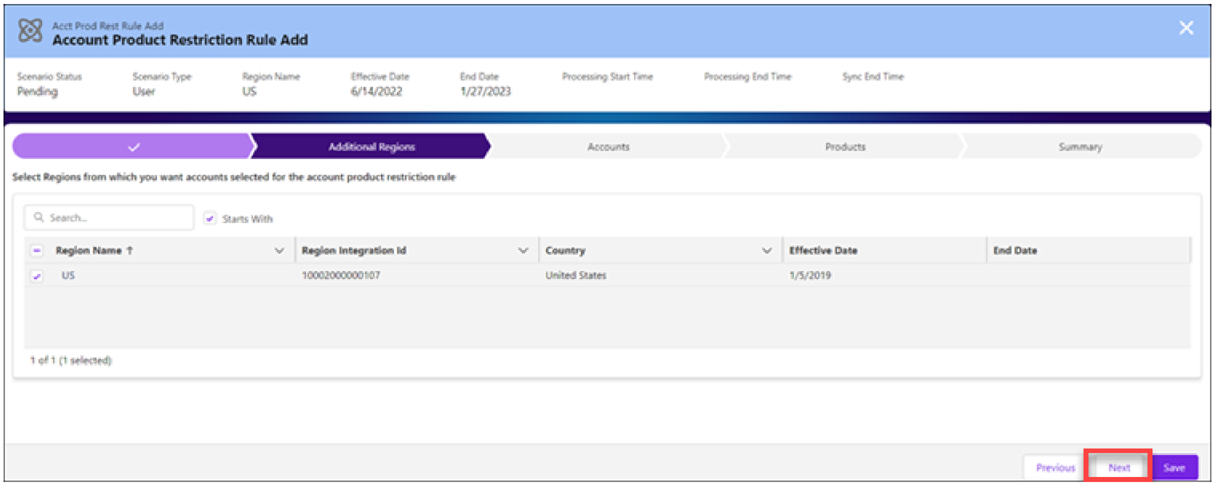
- **Account Product Rule Name**: Name of the rule.
- **Account Product Rule Integration Id**: Unique rule identification number.
- **Description**: Details of the rule.
- **Sales Force**: The sales force the rule applies to.

  Note: If a sales force is selected, account-product restrictions are created for the selected sales force(s) and include the territories within the sales force(s). If no sales force is selected, account-product restrictions are created for the selected account(s) and product(s) regardless of sales force. Account Product Territory Restriction records are created only if Account Territory Alignment exists. When an account territory alignment is unaligned, the account product territory restriction, if any, is end dated along with the account territory alignment.

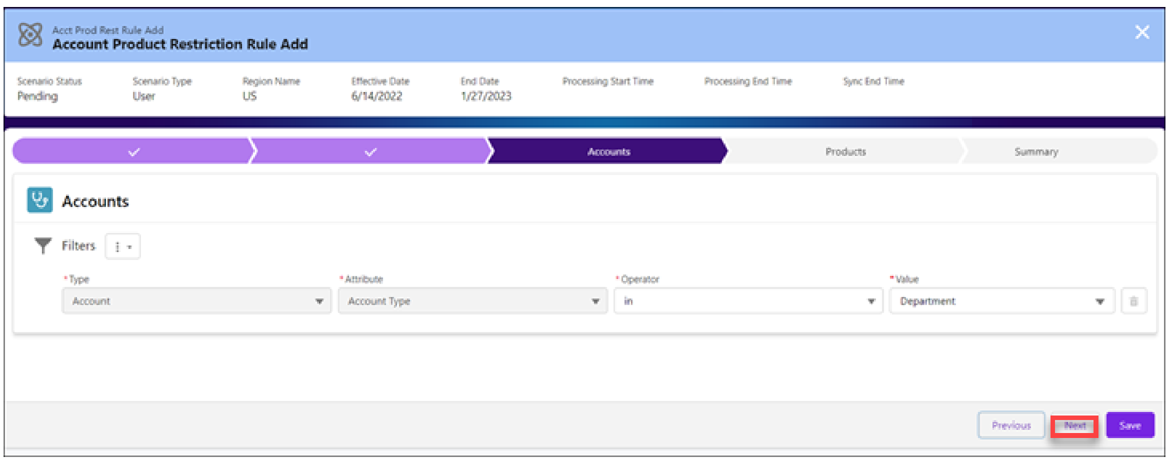
- **External ID**: An additional identification number for cross referencing.

5. Enter the details of the rule and click **Save** if you're not entering additional regions, groups or conditions. If you're entering regions, groups or conditions, click **Next** and continue.

6. Select the regions from which you want accounts selected for the rule, then click **Next**.



7. Enter account information to include in the rule, then click **Next**.



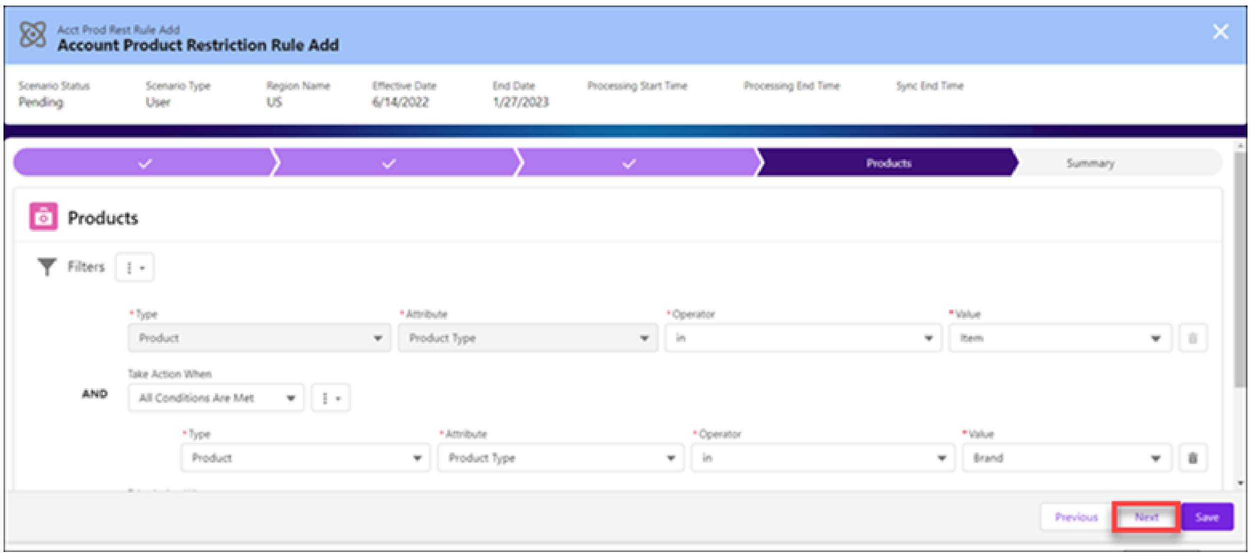
- **Type**: Select *Account* or *Rating*.
- **Attribute**: Select the attribute of the type, such as *Account Type*.
- **Value**: Select a value, such as *Business Contact*, *Department*, *Medical Professional*, *Pharmacy*, or *Wholesaler*.
- **Operator**: Select an operator to indicate what you want to do with the values, such as =, <>, *in*, or *not in*.

  Note: If you want to select more than one value, select the *In* operator before you start selecting values. The *In* operator makes multi-select possible.

8. If applicable, enter groups or conditions to the rule.

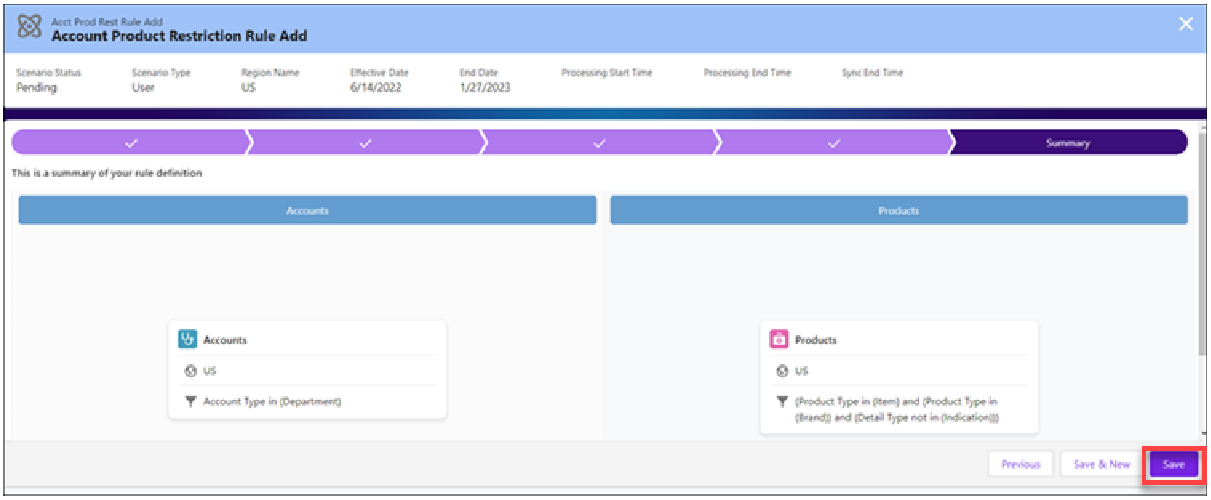
    - **Add Conditions** to include additional filter attributes.
    - **Add Groups** to add filter attributes and combine as *and* or *or* by selecting *Any Condition is Met* or *All Conditions are Met*.

Note: To remove a group or condition, select the **Filters** drop-down and click **Delete** or click **Delete** 🗑 next to the condition.



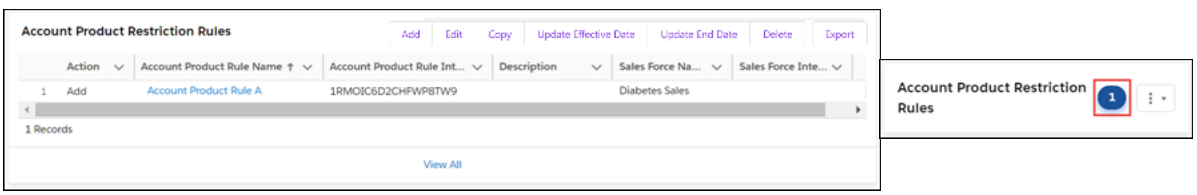
    - Select the **Filters** drop-down and select **Add Group** or **Add Condition**.
    - Select the **Type**, **Attribute**, **Operator**, and **Value** for the group or condition.

9. Click **Next**. A visual representation of your rule in natural sentence form appears so you can validate that the rule definition is correct.



10. Click **Save**.

    The rule is added to the **Account Product Restriction Rules** section in the **Rules** tab and is indicated on the transaction card in the **Overview** section of the **Details** tab.

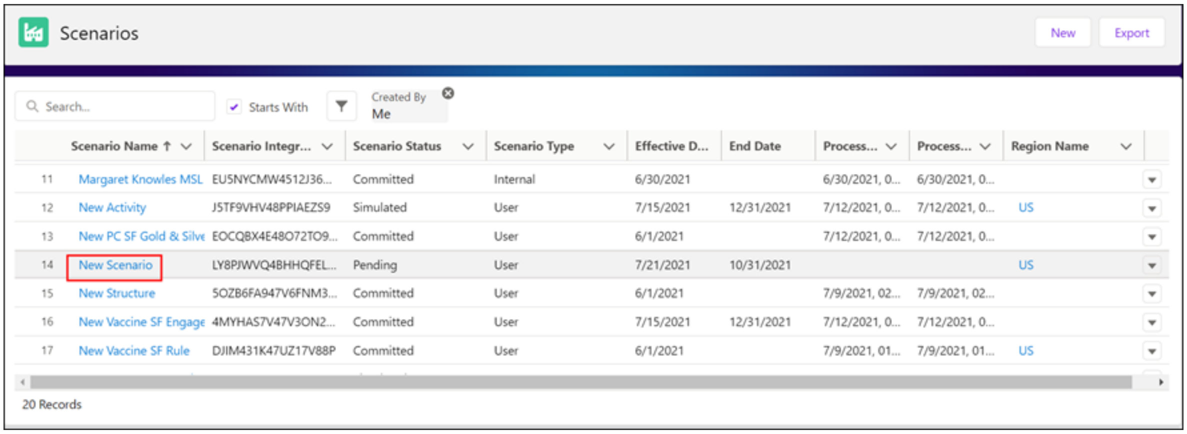


Add an Account Alignment Transaction to a Scenario

After you create a scenario, you can add transactions to it.

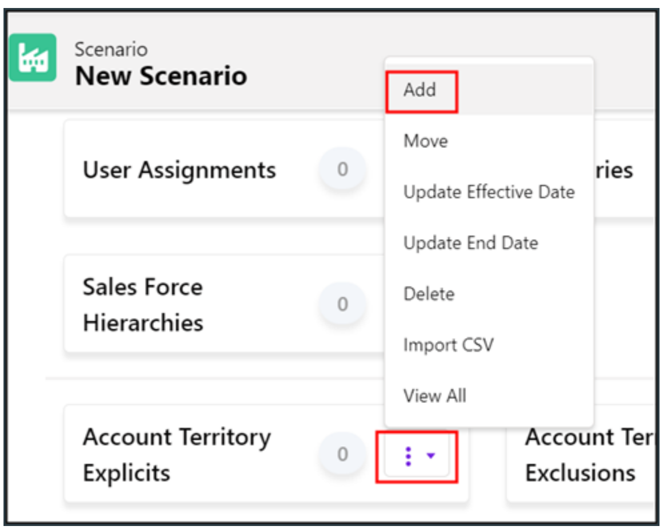
To add an account alignment transaction to a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you would like to add transactions to.

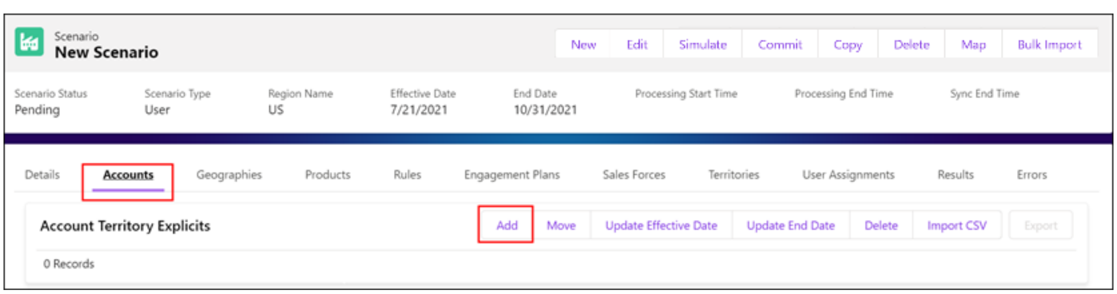


3. Do one of the following:

- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction you would like to add to the scenario, then select **Add**.

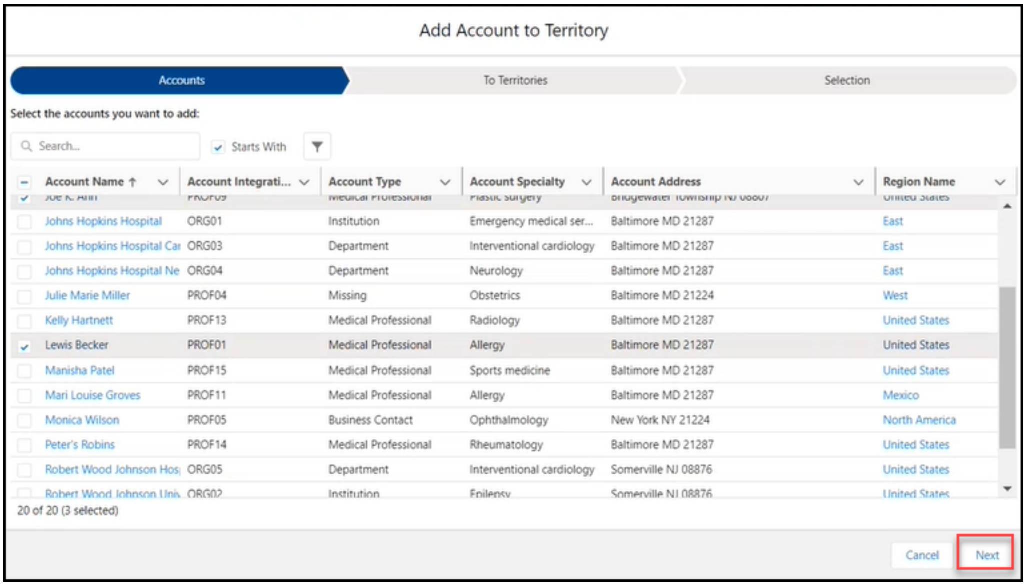


- Click the **Accounts** tab and select **Add** for the transaction you would like to add to the scenario.

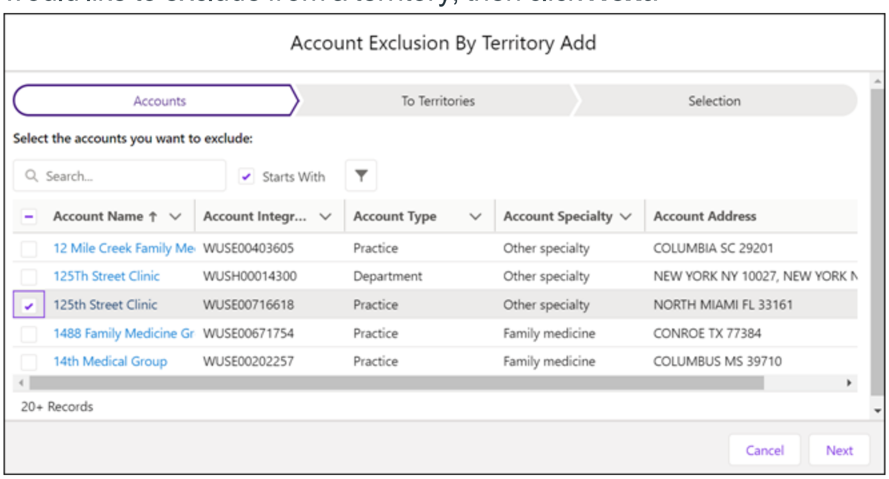


4. Depending on which account transaction you selected, do one of the following:

- For ***Account Territory Explicits***, select the check boxes next to the accounts you would like to add to a territory, then click **Next**.

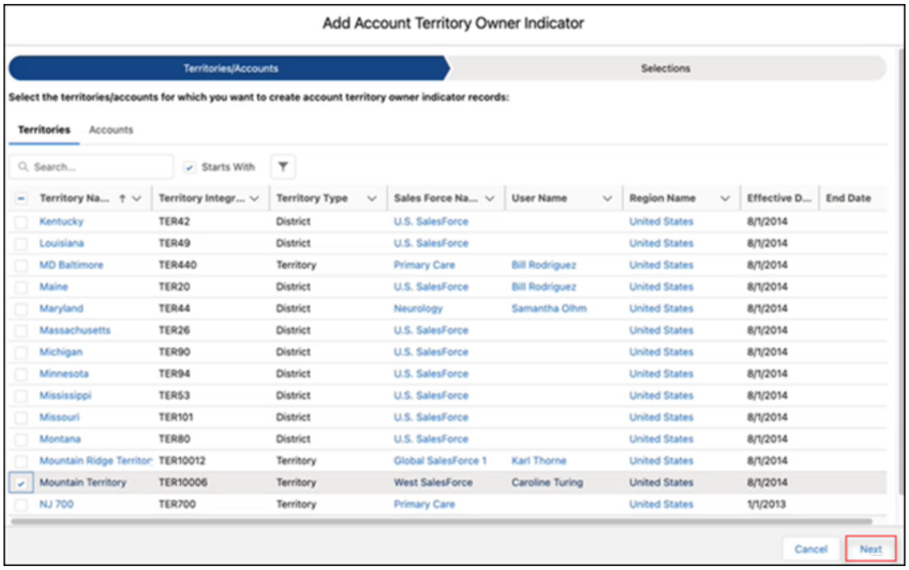


- For ***Account Territory Exclusions***, select the check boxes next to the accounts you would like to exclude from a territory, then click **Next**.

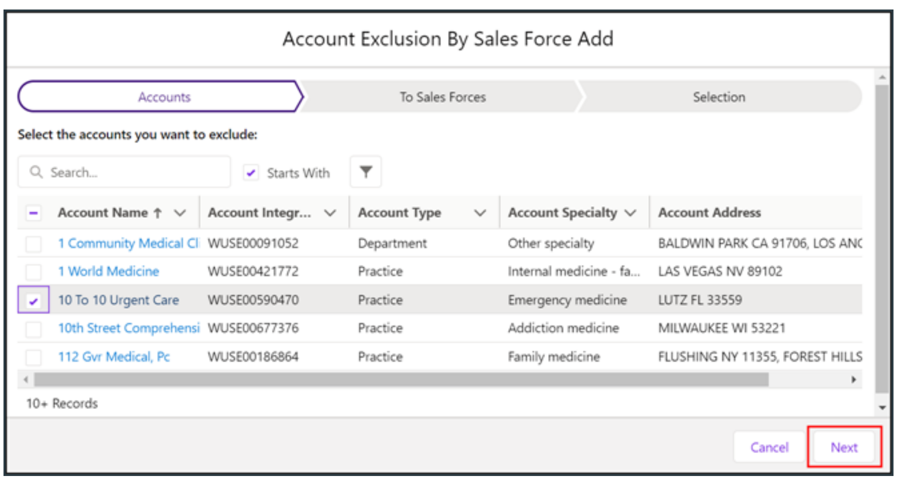


- For ***Account Territory Owner Indicator***, use the **Territories** and **Accounts** tabs to select the check boxes next to the territories/accounts for which you would like to create account territory owner indicator records then click **Next**.

Note: This option displays only if you have Account Owner Indicator permissions. Contact your system administrator for more information.



- For ***Account Sales Force Exclusions***, select the check boxes next to the accounts you would like to exclude from a sales force, then click **Next**.

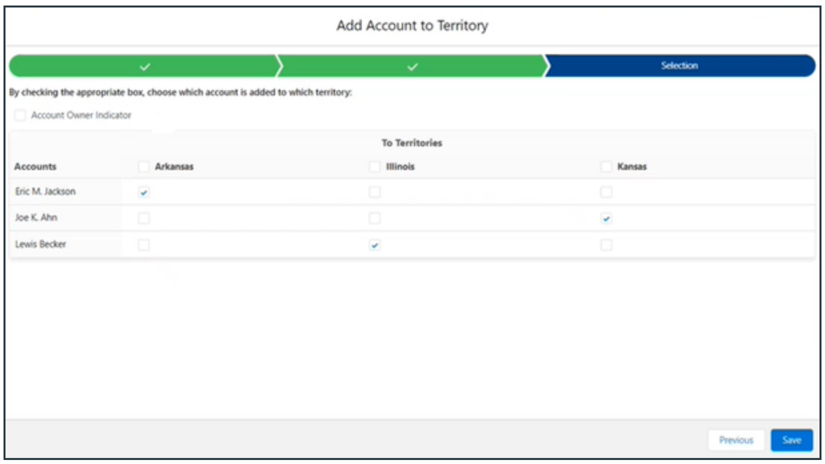


5. Depending on which account transaction you selected, do one of the following:

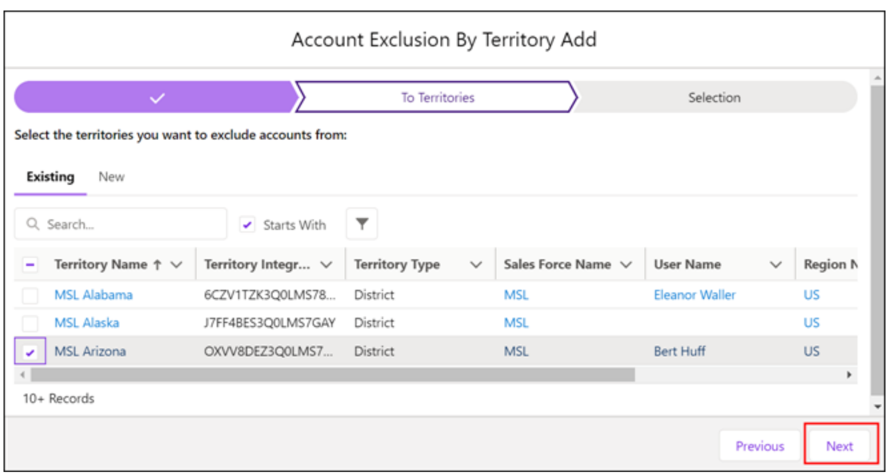
Note: The **Existing** tab on the To Territories or To Sales Forces screen contains all current territories or sales forces in the database. The **New** tab contains a territory or sales force that was just created in the scenario.

Tip: If you want to modify your selections from the previous page, click **Previous** and update your selections.

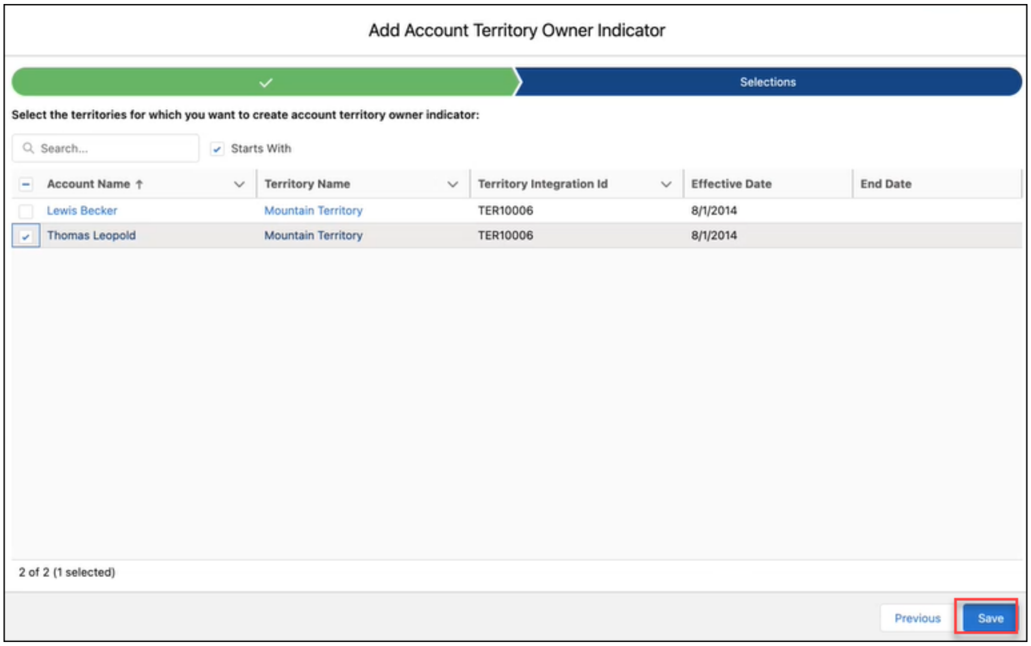
- For ***Account Territory Explicits***, select the check boxes next to the territories you would like to add accounts to. Select **Account Owner Indicator** to automatically create account territory owner indicator records for the selected account-territory combinations. Otherwise, leave the check box blank. Click **Next**.



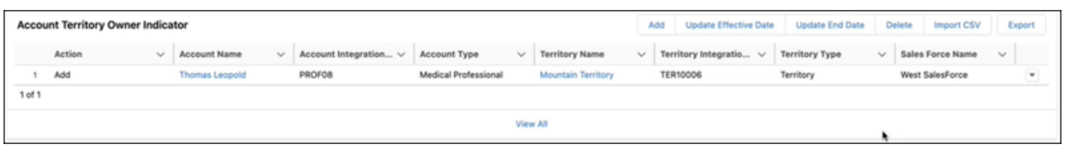
- For ***Account Territory Exclusions***, select the check boxes next to the territories you would like to exclude accounts from, and then click **Next**.

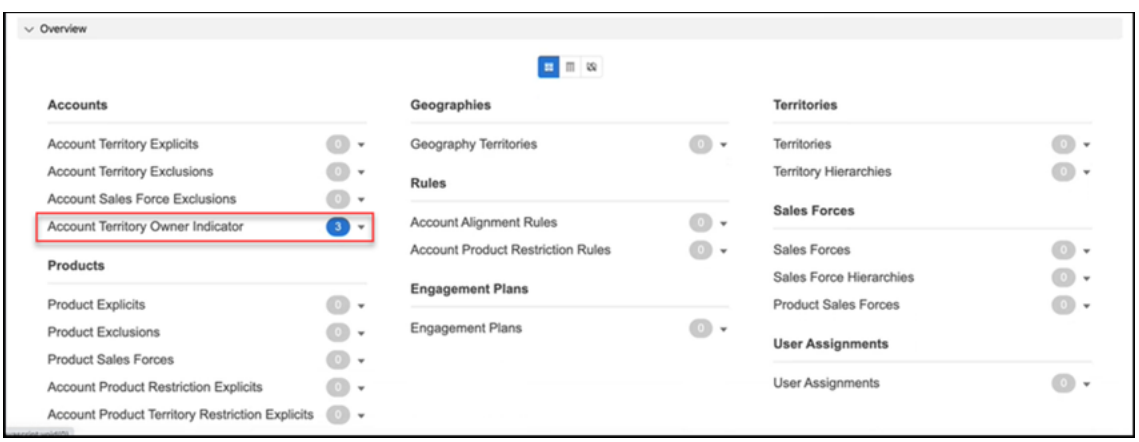


- For ***Account Territory Owner Indicator***, select the check boxes next to the territories or accounts for which you would like to create account territory owner indicator records , then click **Save**.

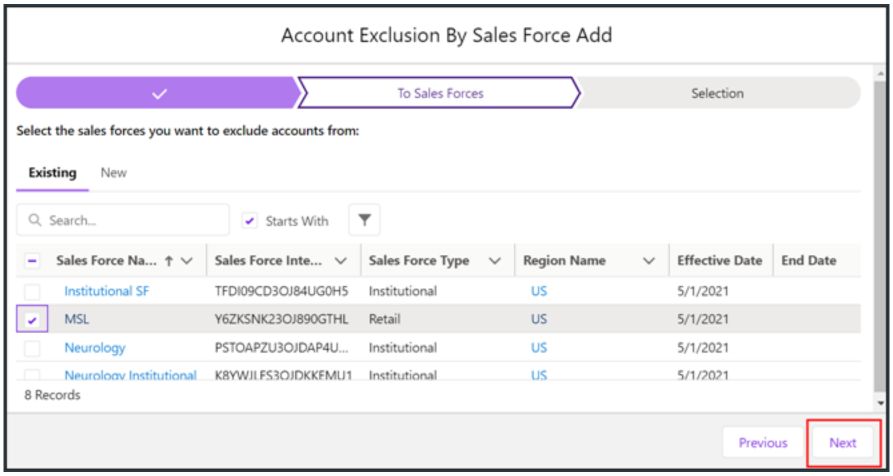


The account territory owner indicator transactions are added to the **Account Territory Owner Indicator** section on the **Accounts** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.





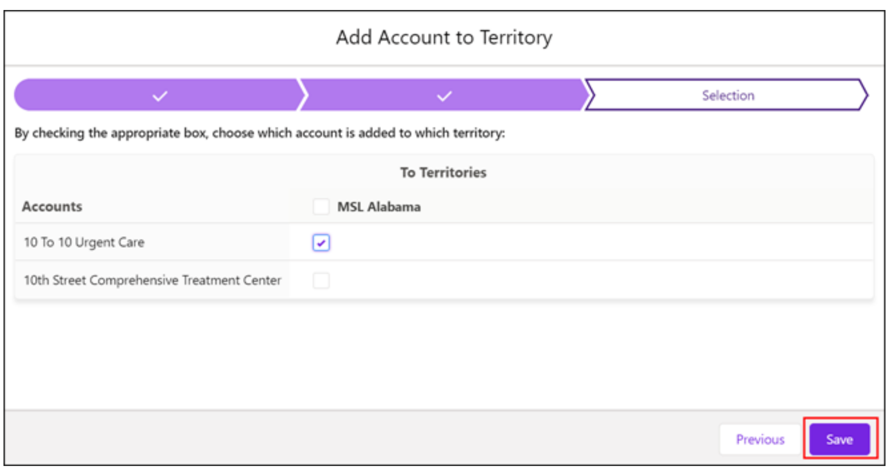
- For ***Account Sales Force Exclusions***, select the check boxes next to the sales forces you would like to exclude accounts from, then click **Next**.



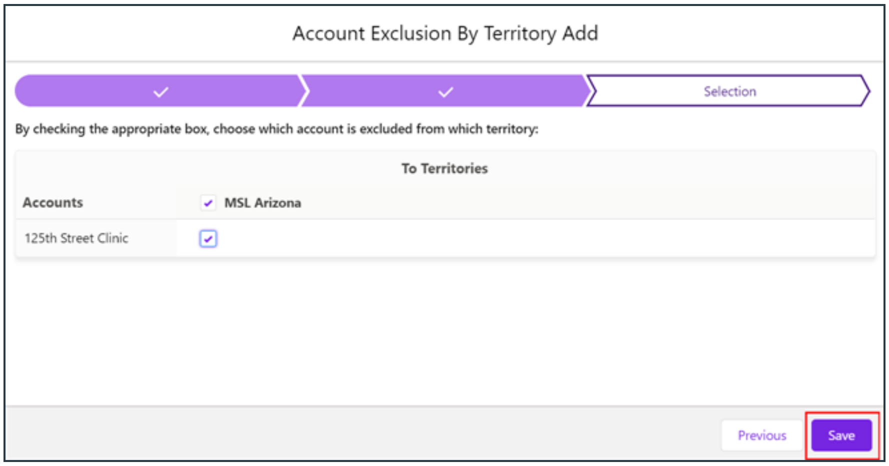
6. Depending on which account transaction you selected, do one of the following:

> **Tip:** If you want to modify your selections from the previous page, click **Previous** and update your selections.

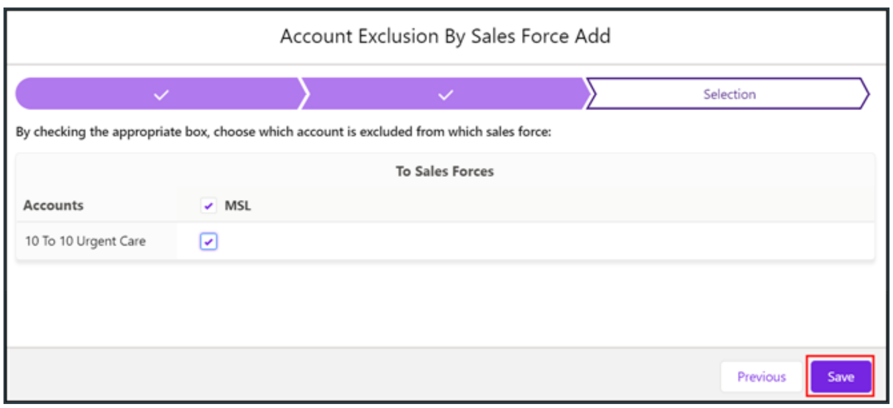
- For ***Account Territory Explicits***, choose which account is added to which territory by selecting the appropriate check box for the account under the appropriate territory.



- For ***Account Territory Exclusions***, choose which account is excluded from which territory by selecting the appropriate check box for the account under the appropriate territory.

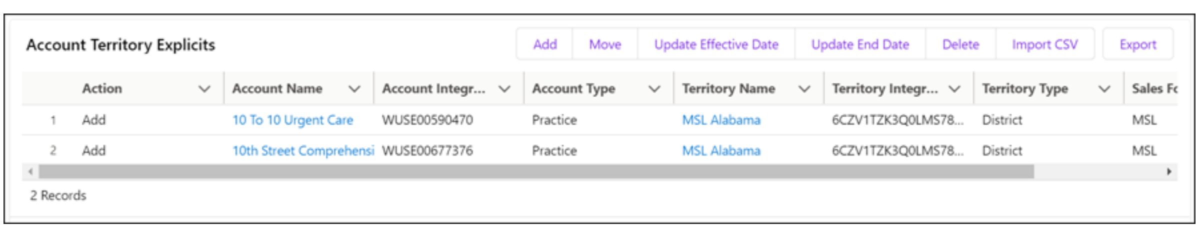


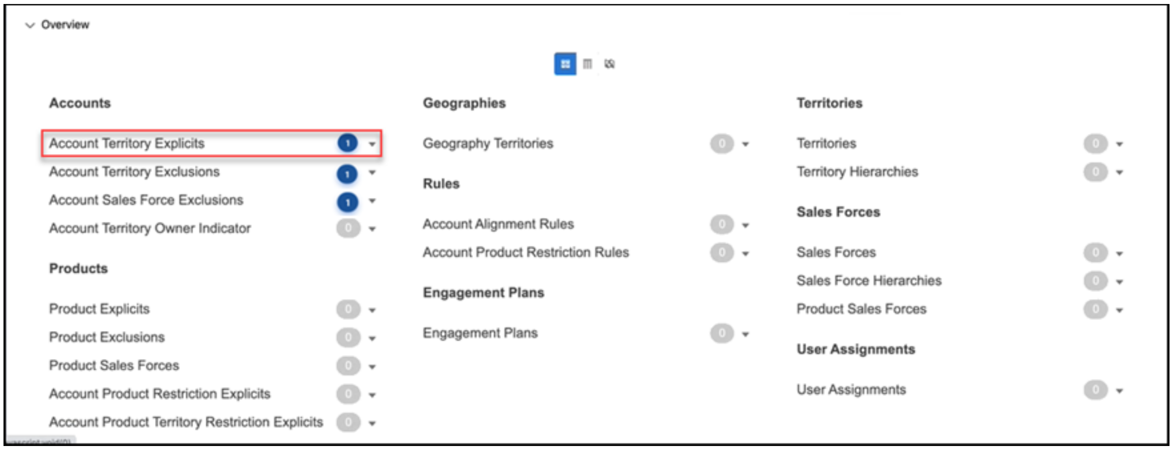
- For ***Account Sales Force Exclusions***, choose which account is excluded from which sales force by selecting the appropriate check box for the account under the appropriate sales force.



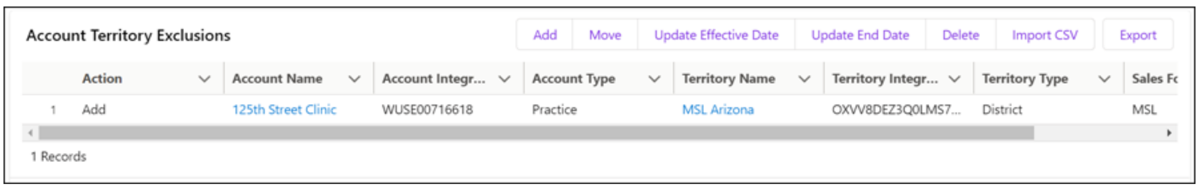
7. Click **Save**.

   The account territory explicits transactions are added to the **Account Territory Explicits** section on the **Accounts** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.





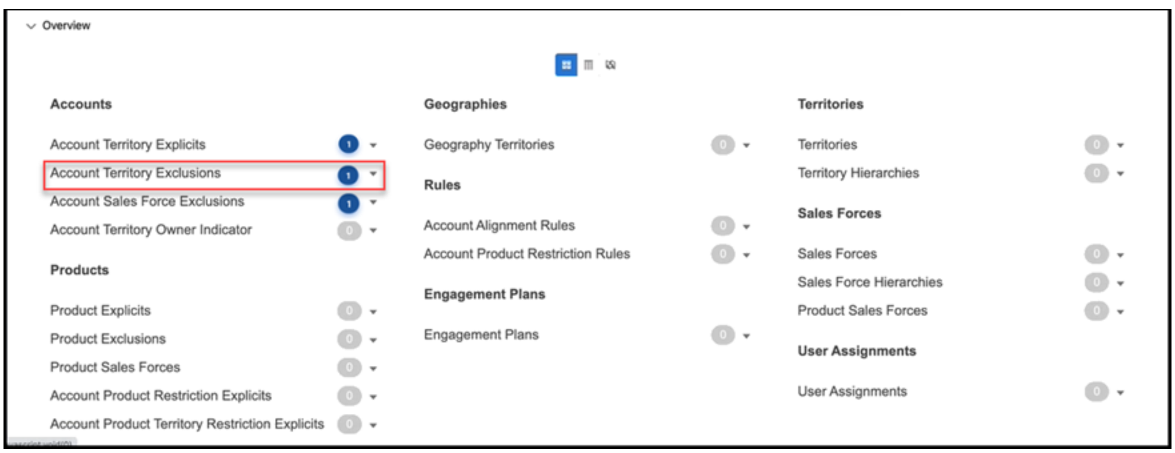
The account territory exclusions transactions are added to the **Account Territory Exclusions** section on the **Accounts** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.


Account Territory Exclusions

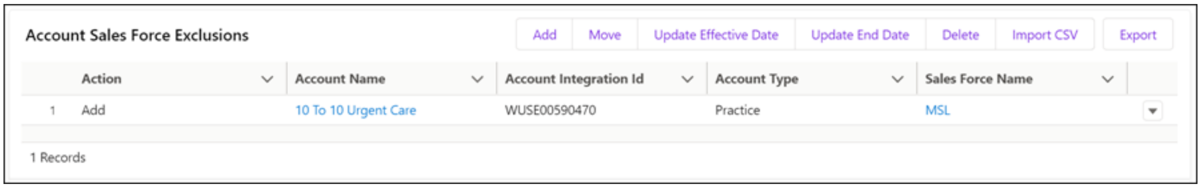
Add | Move | Update Effective Date | Update End Date | Delete | Import CSV | Export

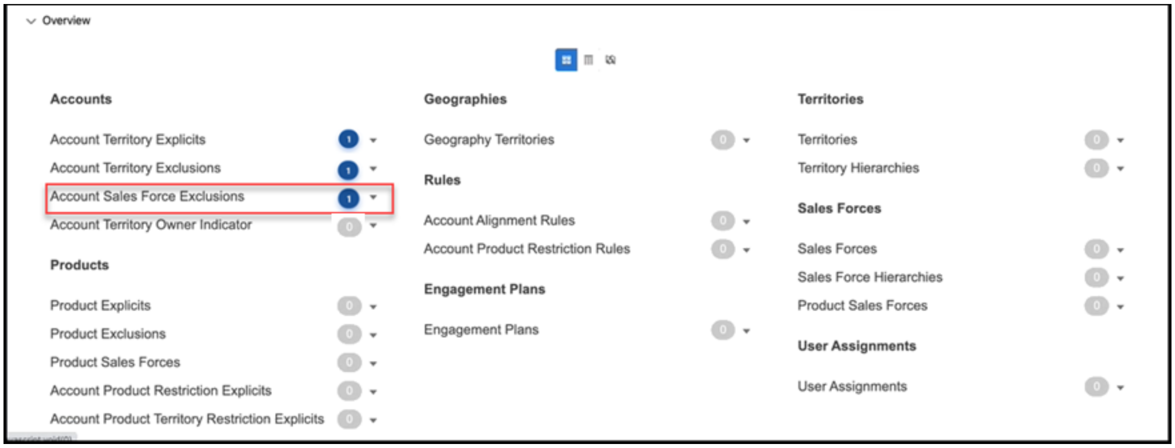
	Action	Account Name	Account Integr...	Account Type	Territory Name	Territory Integr...	Territory Type	Sales Fc
1	Add	125th Street Clinic	WUSE00716618	Practice	MSL Arizona	OXVV8DEZ3Q0LMS7...	District	MSL

1 Records



The account sales force exclusions transactions are added to the **Account Sales Force Exclusions** section on the **Accounts** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.



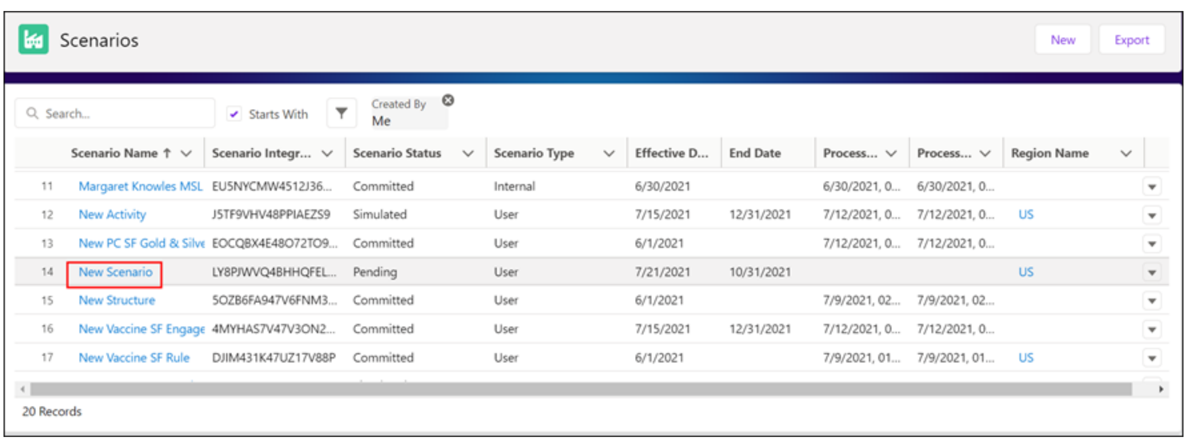


Add a Geography Alignment Transaction to a Scenario

After you create a scenario, you can add transactions to it.

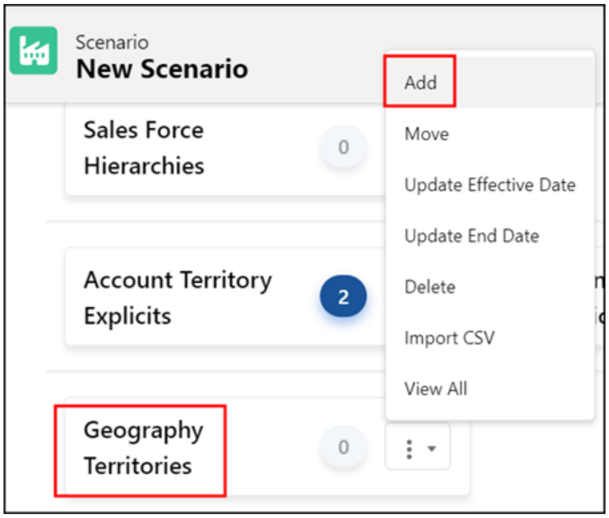
To add a geography alignment transaction to a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.

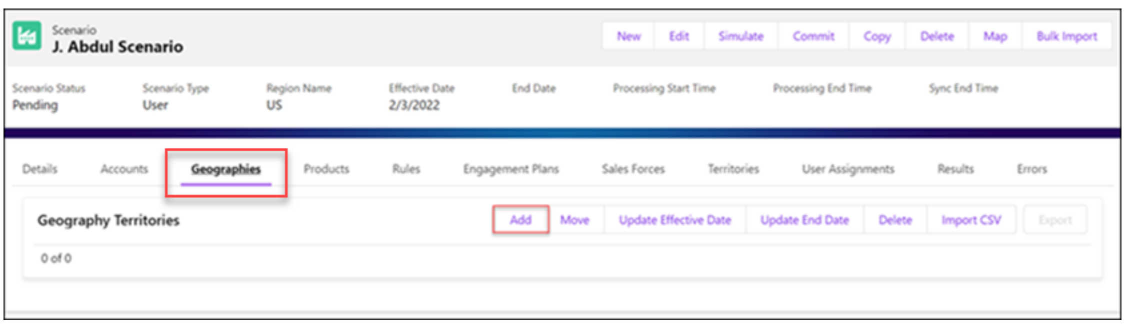


3. Do one of the following:

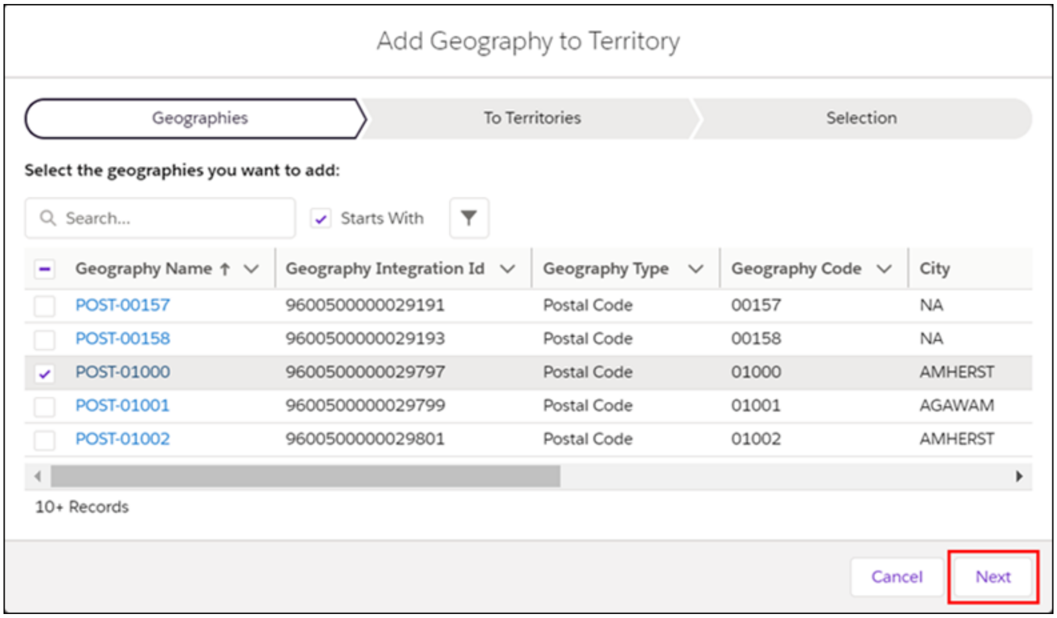
- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **Geography Territories**, and then select **Add**.



- Click the **Geographies** tab and select **Add** for the Geography Territories transaction.

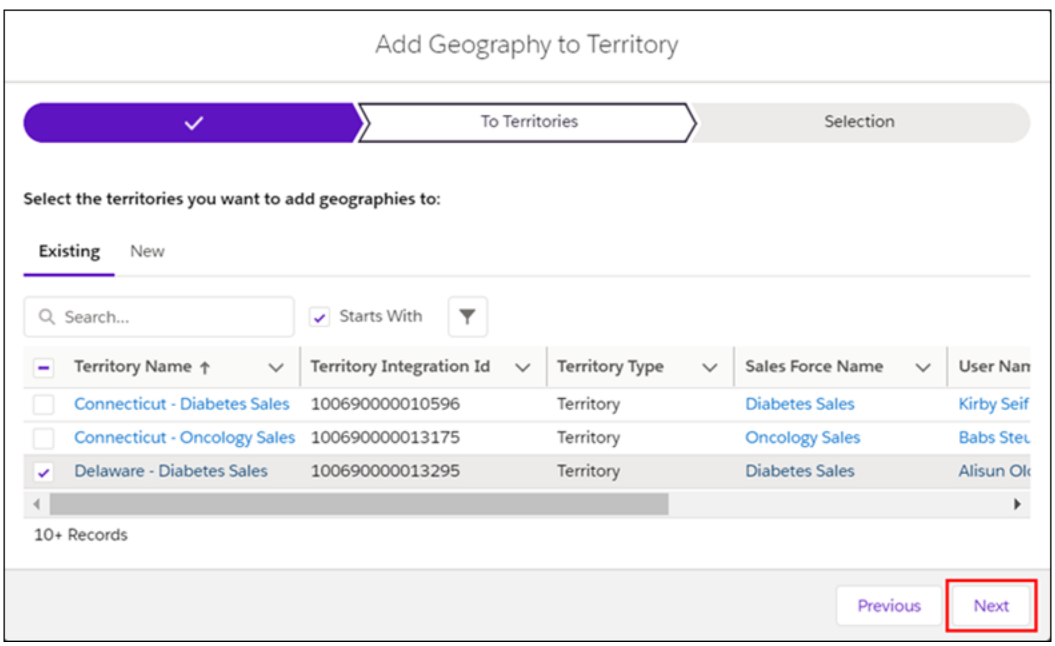


4. Select the check boxes next to the geographies you want to add to a territory, then click **Next**.

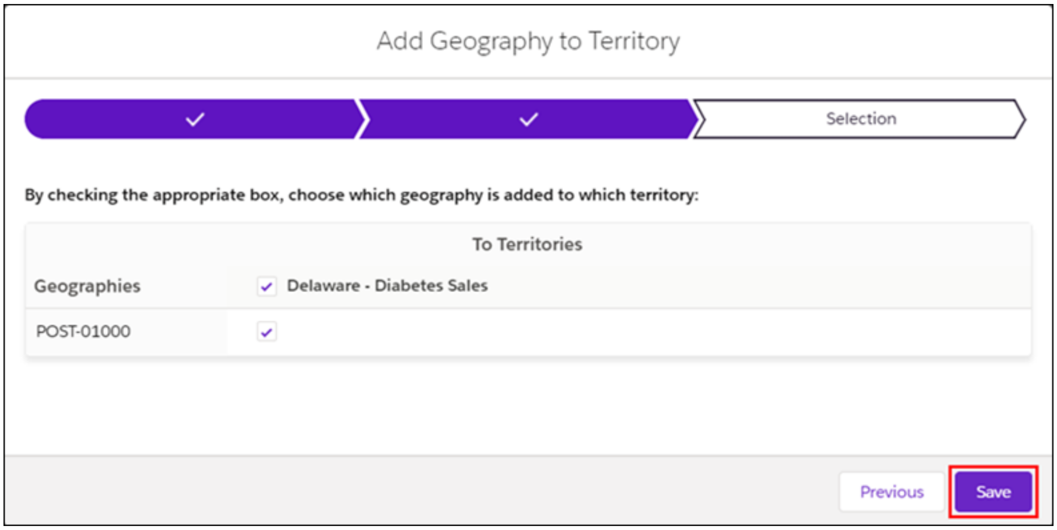


5. Select the check boxes next to the territories you want to add geographies to, and then click **Next**.

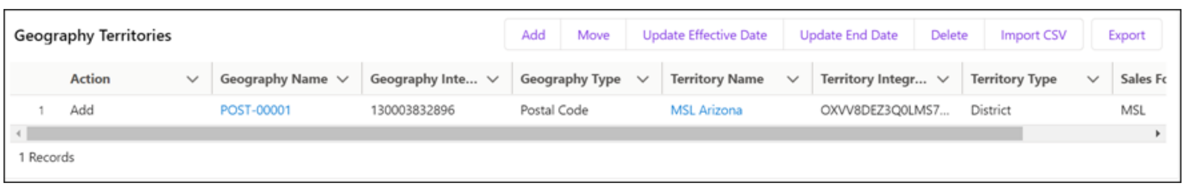
> **Note:** The **Existing** tab contains all current territories in the database, and the **New** tab contains territories that were just created in the scenario.



6. Choose which geography is added to which territory by selecting the appropriate check box for the geography under the appropriate territory, then click **Save**.



The geography territories transactions are added to the **Geography Territories** section in the **Geographies** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.

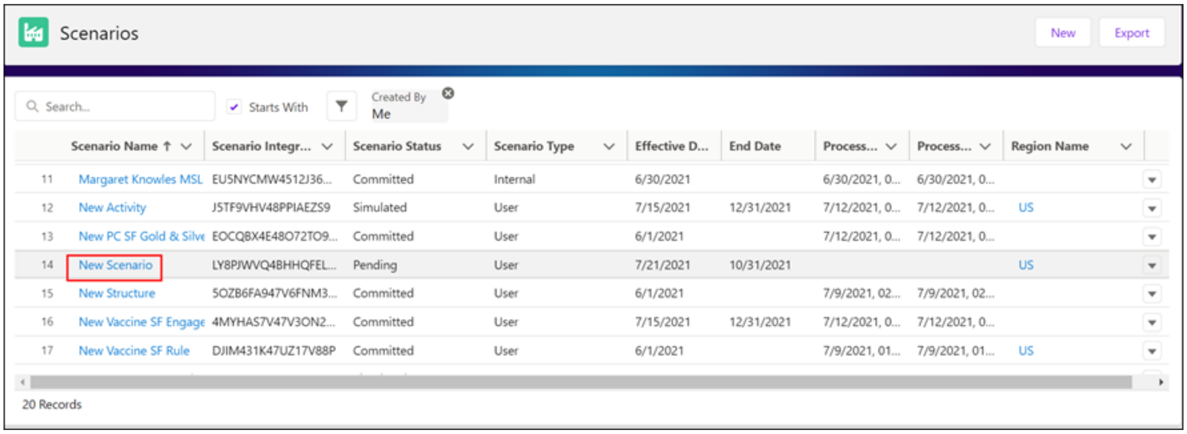


Add a Product Alignment Transaction to a Scenario

After you create a scenario, you can add transactions to it.

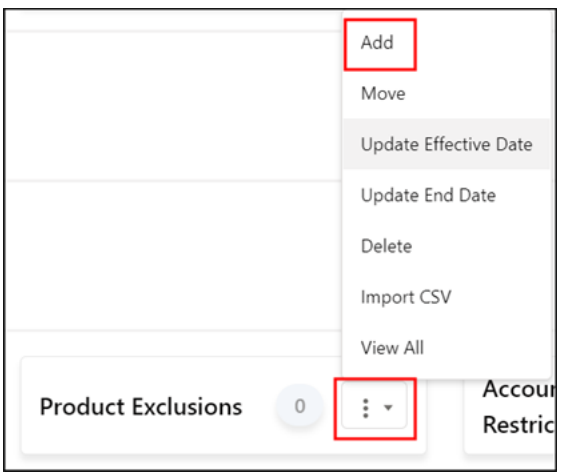
To add a product alignment transaction to a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.

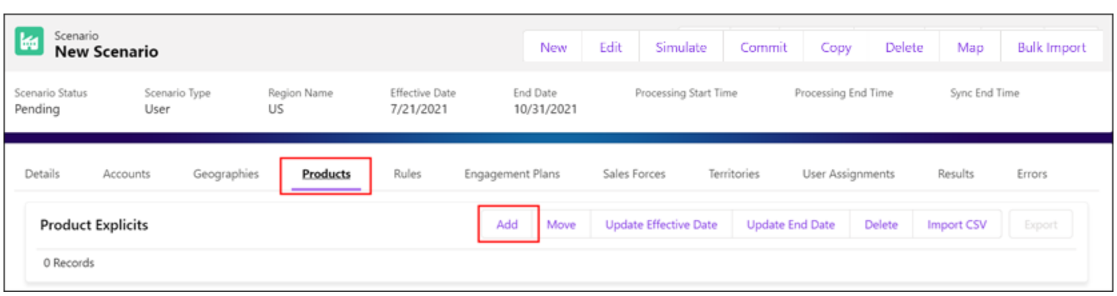


3. Do one of the following:

- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the product transaction you want to add to the scenario, then select **Add**.



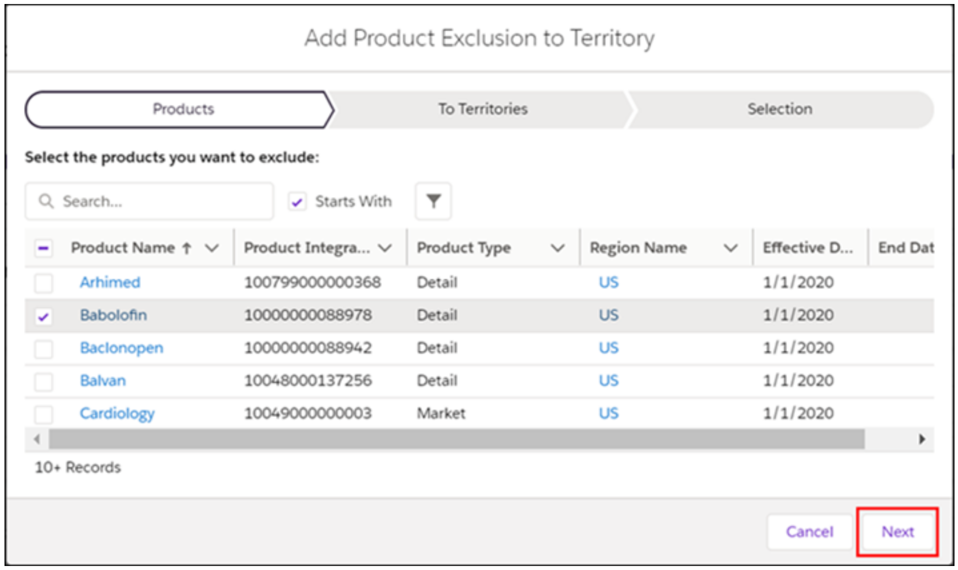
- From the **Products** tab, click **Add** for the transaction you want to add to the scenario.



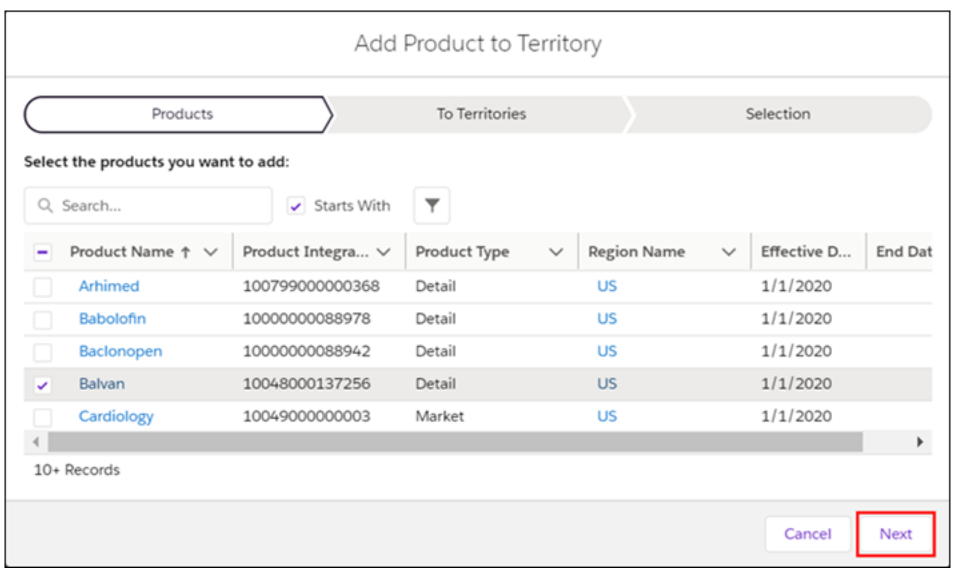
- Depending on which product transaction you selected, do one of the following:

Note: If the scenario has related OMScenarioProducts records, a **Product** grid appears in this section without any actions.

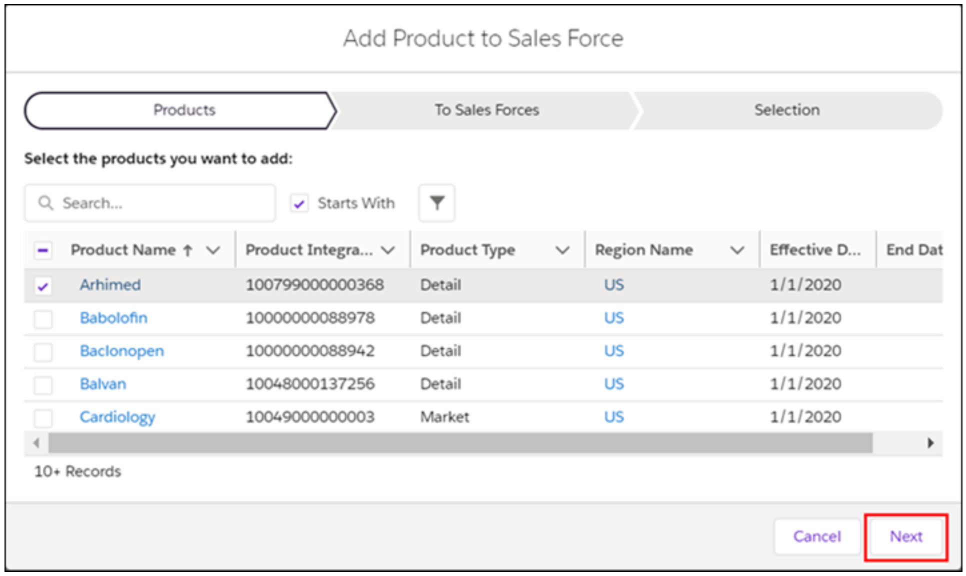
- ***For Product Exclusions***, select the check boxes next to the products you want to exclude from a territory, and then click **Next**.



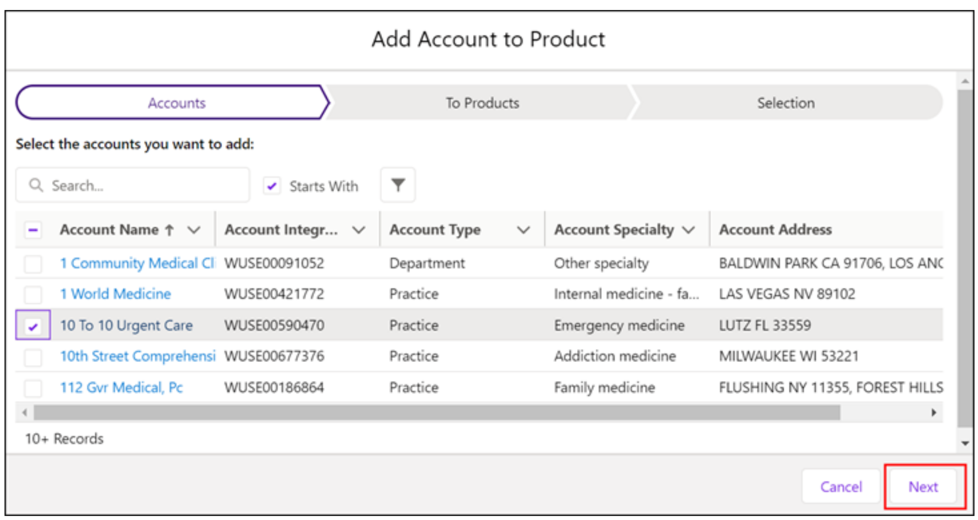
- ***For Product Explicits***, select the check boxes next to the products you want to add to a territory, and then click **Next**.



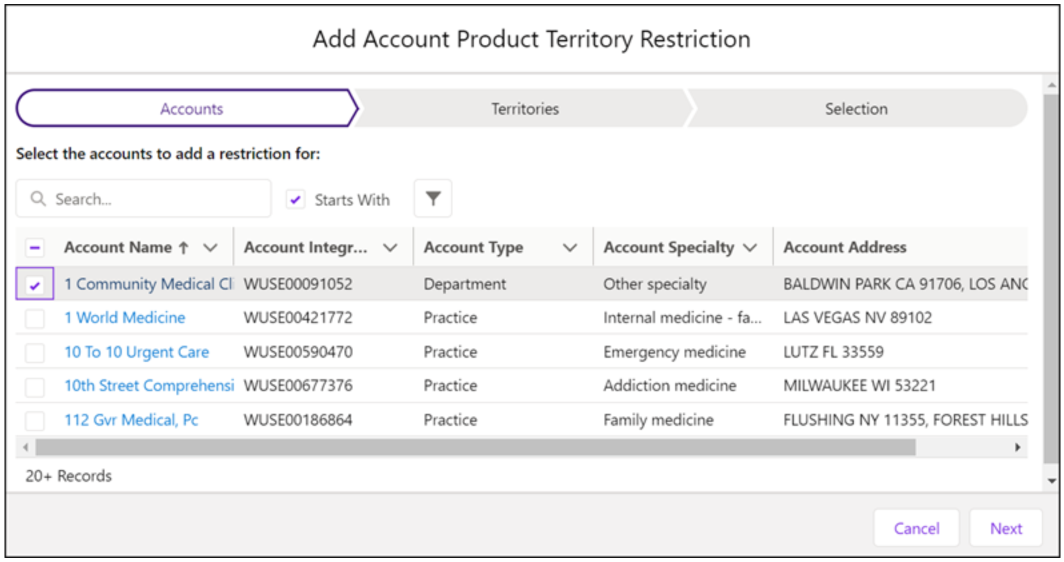
- ***For Product Sales Forces***, select the check boxes next to the products you want to add to a sales force, and then click **Next**.



- ***For Account Product Restriction Explicits***, select the check boxes next to the accounts you want to restrict products from, and then click **Next**.



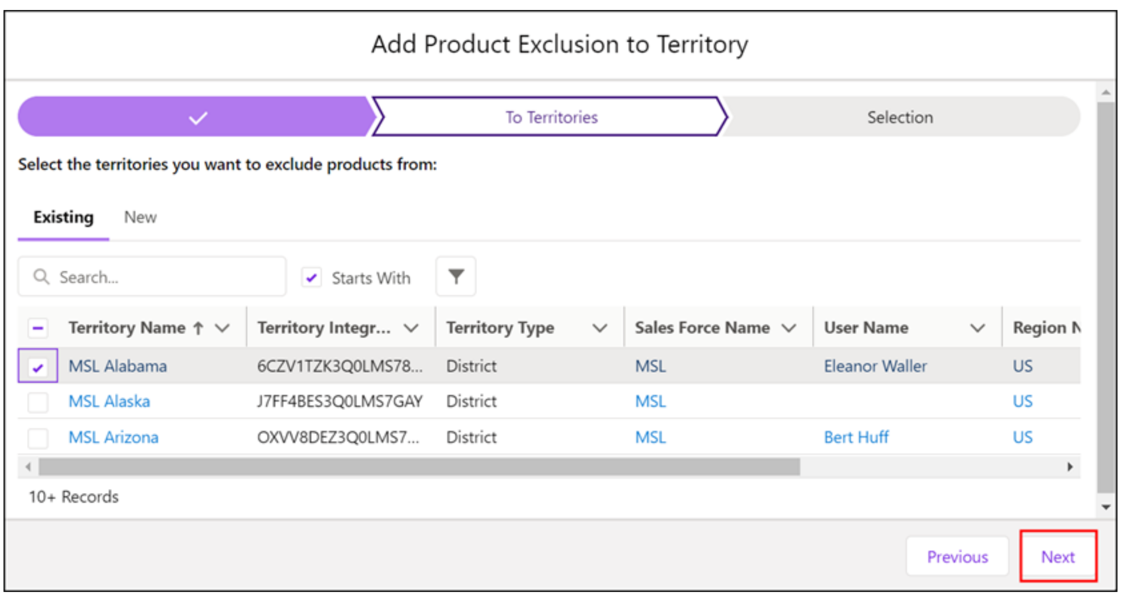
- ***For Account Product Territory Restriction Explicits***, select the check boxes next to the accounts you want to add a restriction for, and then click **Next**.



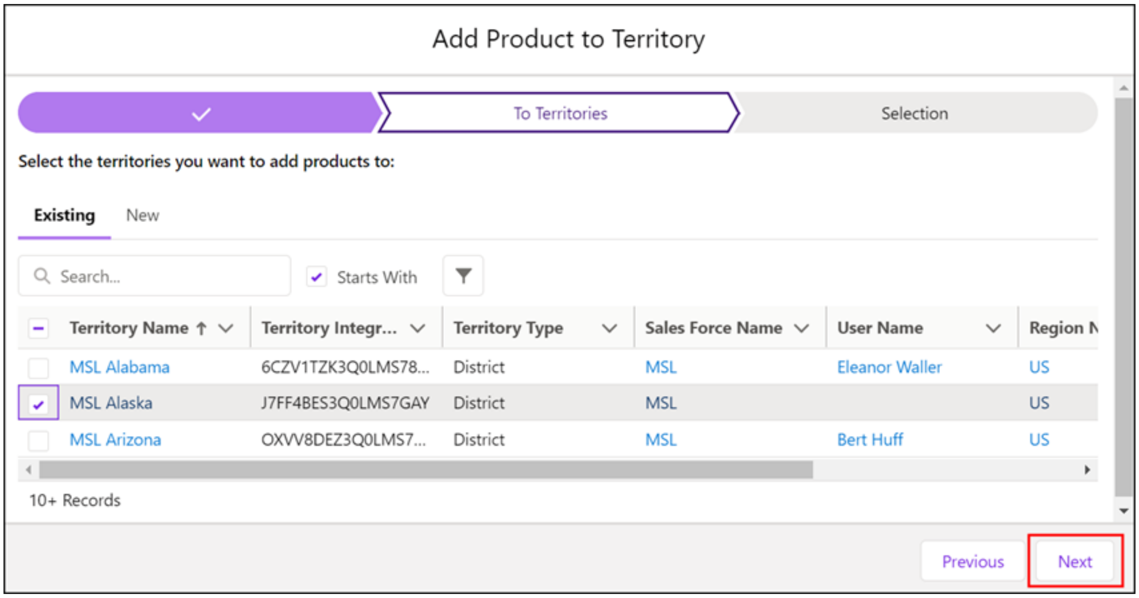
4. Depending on which product transaction you selected, do one of the following:

> **Note:** The **Existing** tab contains all current territories in the database and the **New** tab contains territories that were just created in the current scenario.

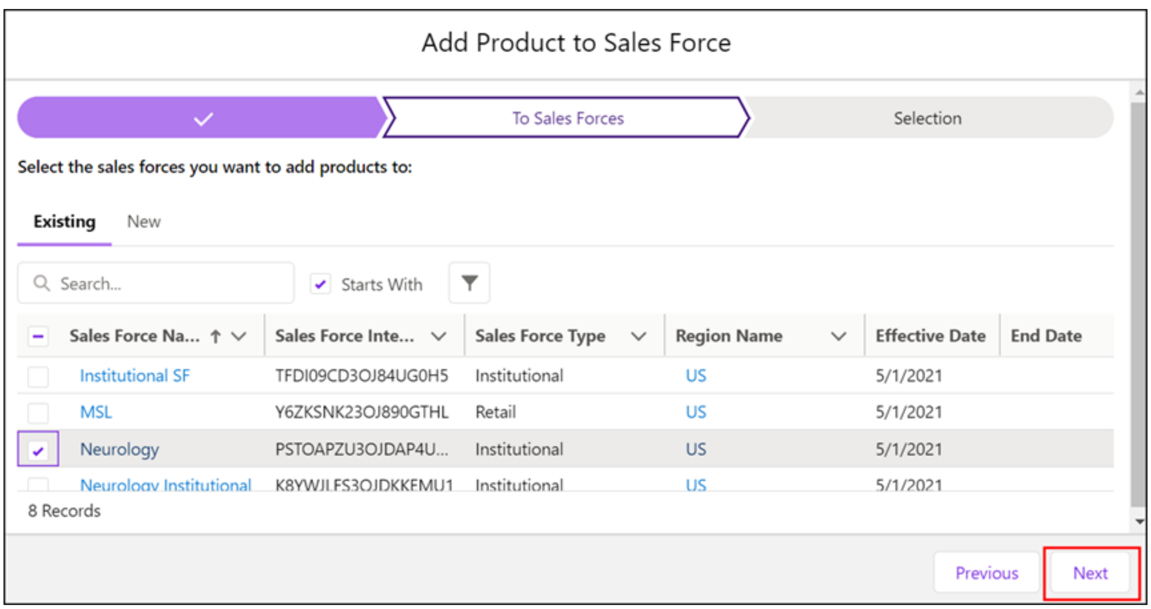
- ***For Product Exclusions***, select the check boxes next to the territories you want to exclude products from, then click **Next**.



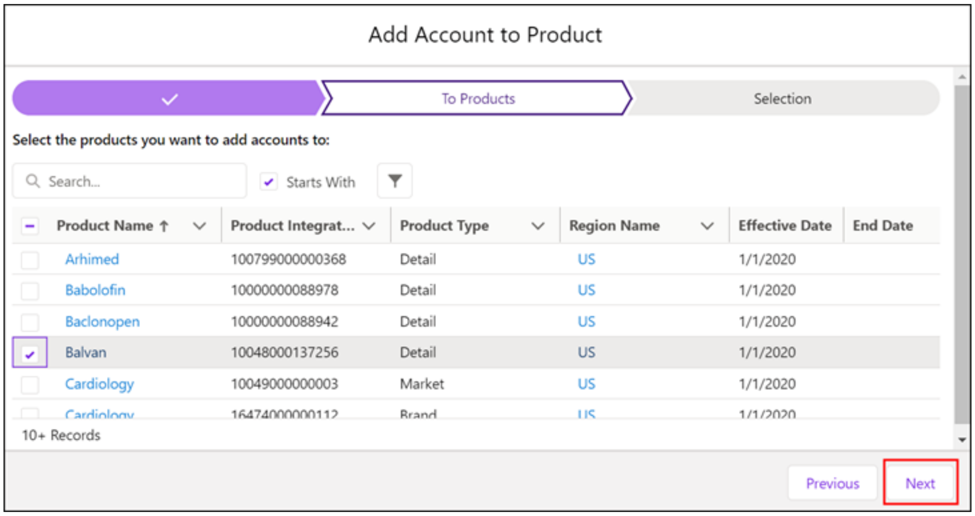
- ***For Product Explicits***, select the check boxes next to the territories you want to add products to, and then click **Next**.



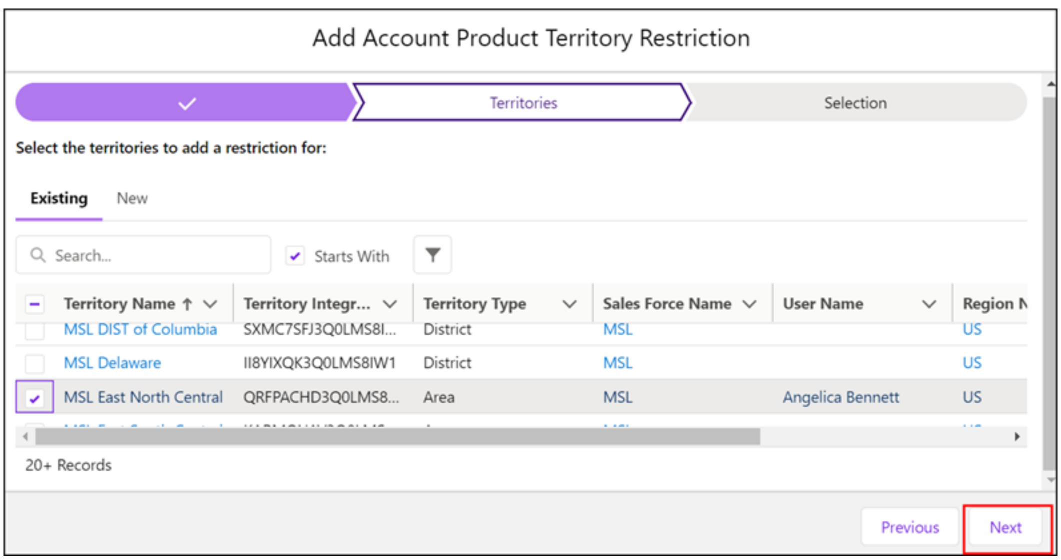
- ***For Product Sales Forces***, select the check boxes next to the sales forces you want to add products to, and then click **Next**.



- ***For Account Product Restriction Explicits***, select the check boxes next to the products you want to add accounts to, and then click **Next**.

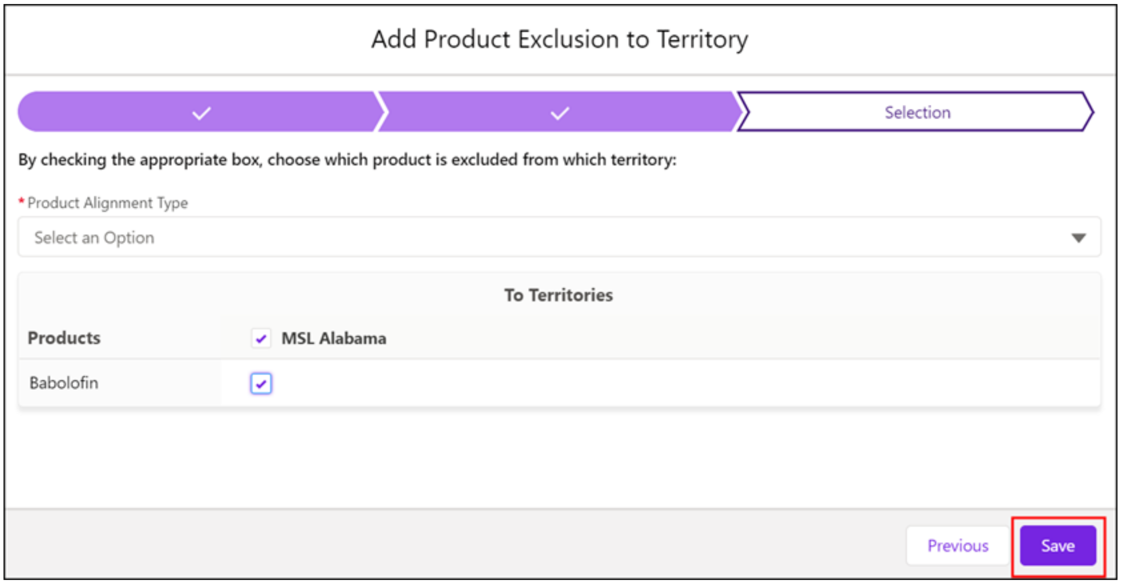


- ***For Account Product Territory Restriction Explicits***, select the check boxes next to the territories you want to add a restriction for, and then click **Next**.

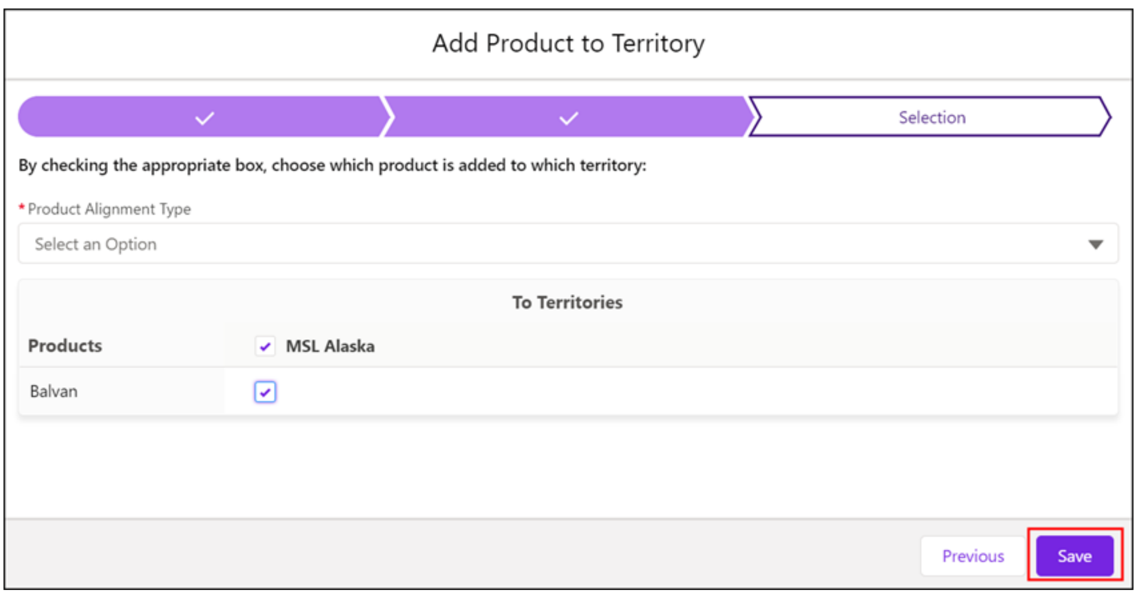


5. Depending on which accounts transaction you selected, do one of the following:

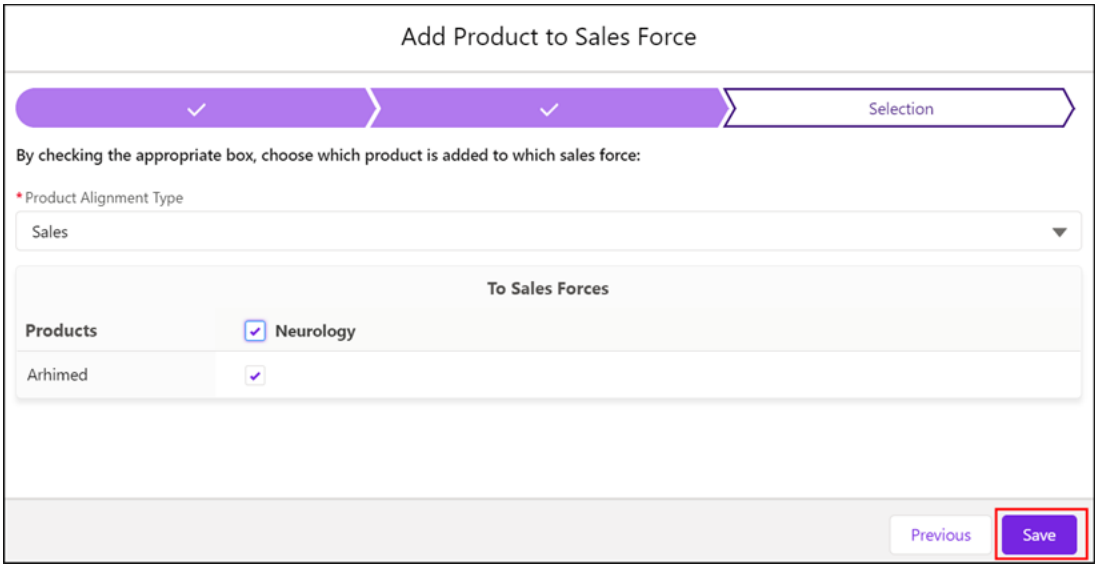
    - ***For Product Exclusions***, select the **Product Alignment Type**, then choose which product is excluded from which territory by selecting the appropriate check box for the product under the appropriate territory.



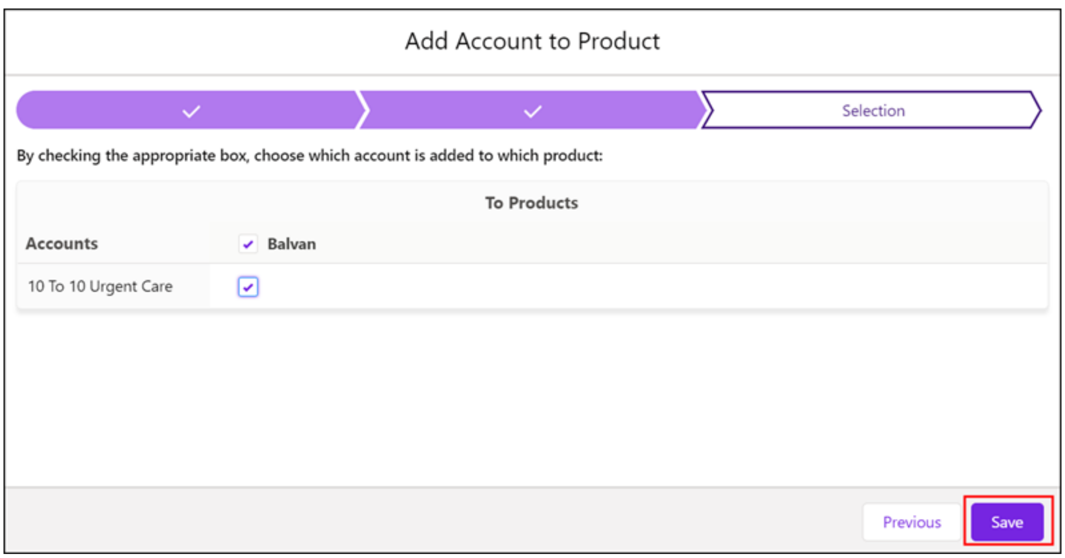
- ***For Product Explicits***, select the **Product Alignment Type**, and then choose which product is added to which territory by selecting the appropriate check box for the product under the appropriate territory.



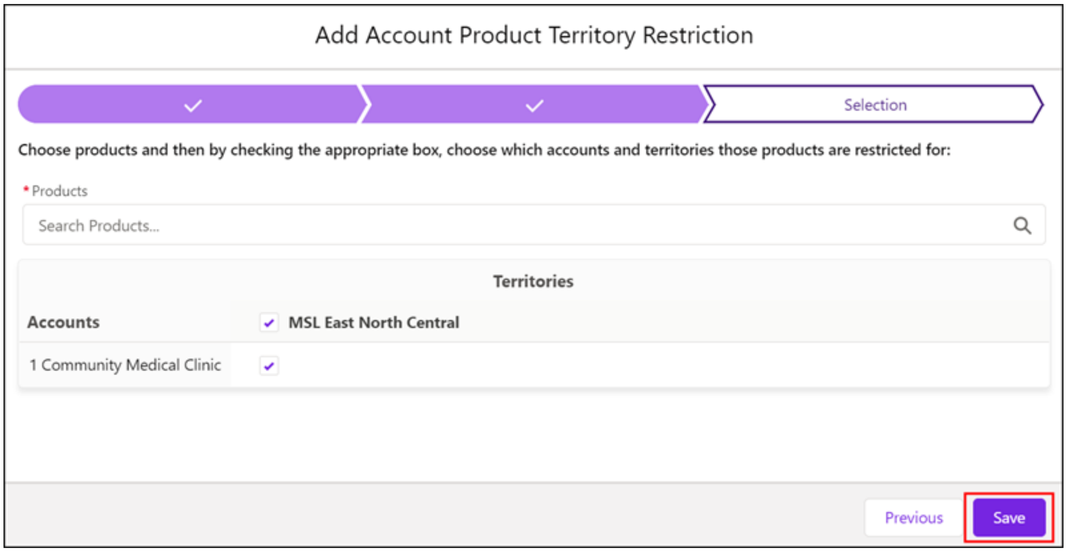
- ***For Product Sales Forces***, select the **Product Alignment Type**, and then choose which product is added to which sales force by selecting the appropriate check box for the product under the appropriate sales force.



- ***For Account Product Restriction Explicits***, choose which account is added to which product by selecting the appropriate check box for the account under the appropriate product.

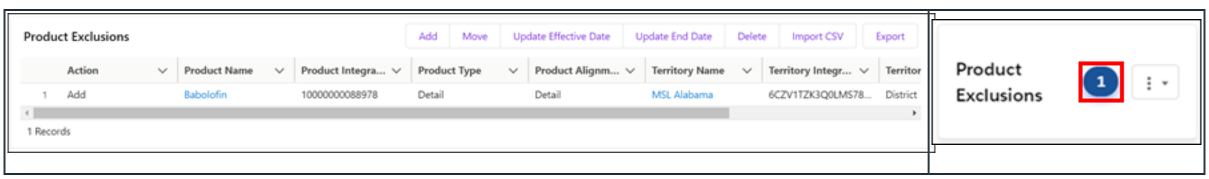


- ***For Account Product Territory Restriction Explicits***, choose products and then choose which accounts and territories those products are restricted for.

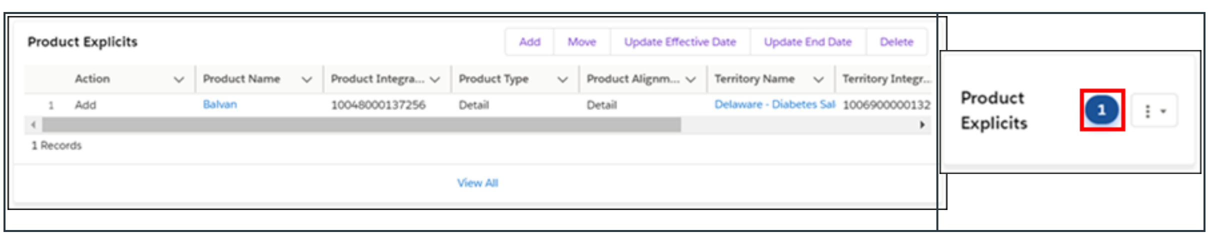


6. Click **Save**.

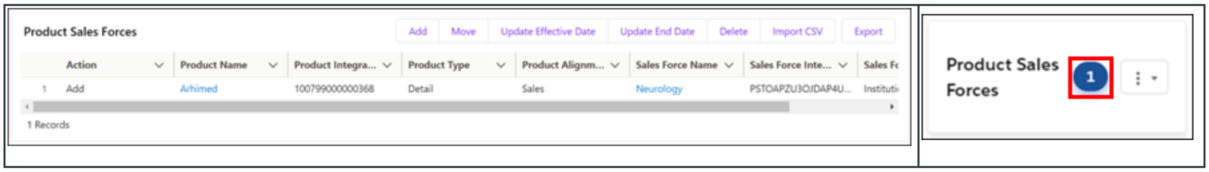
   The product exclusions transactions have been added to the **Product Exclusions** section in the **Products** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.



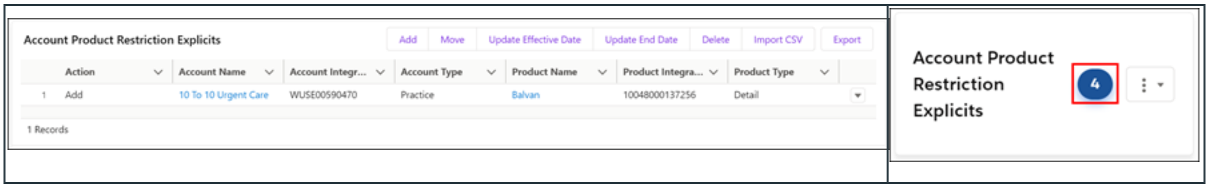
   The product explicit transactions have been added to the **Product Explicits** section in the **Products** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.



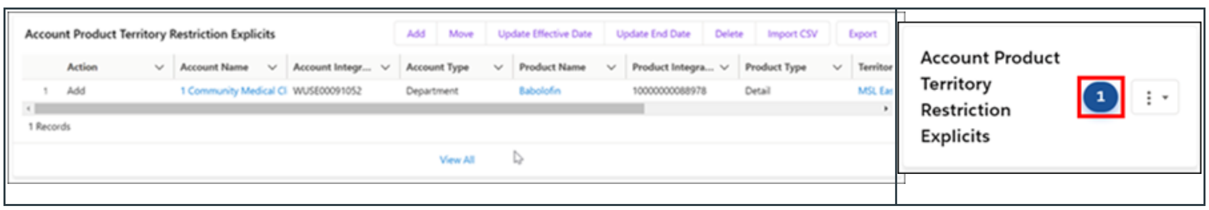
   The product sales forces transactions have been added to the **Product Sales Forces** section in the **Products** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.



The account product restriction explicit transactions have been added to the **Account Product Restriction Explicits** section in the **Products** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.



The account product territory restriction explicit transactions have been added to the **Account Product Territory Restriction Explicits** section in the **Products** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.

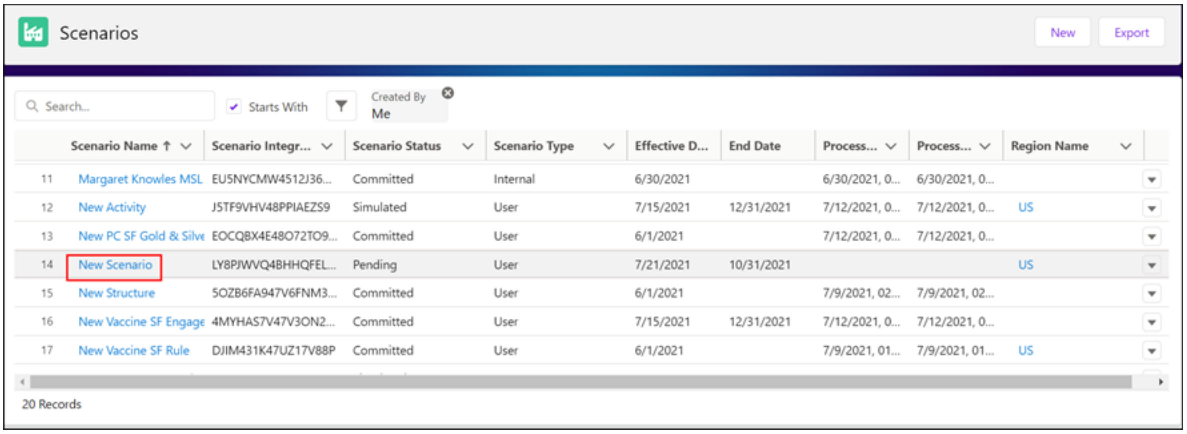


Add a Sales Force Transaction to a Scenario

After you create a scenario, you can add transactions to it.

To add a sales force transaction to a scenario

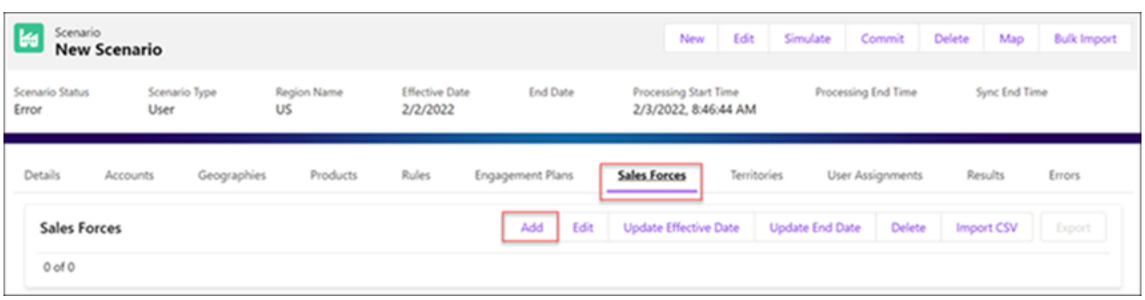
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.



3. Do one of the following:

- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction you want to add to the scenario, and then select **Add**.

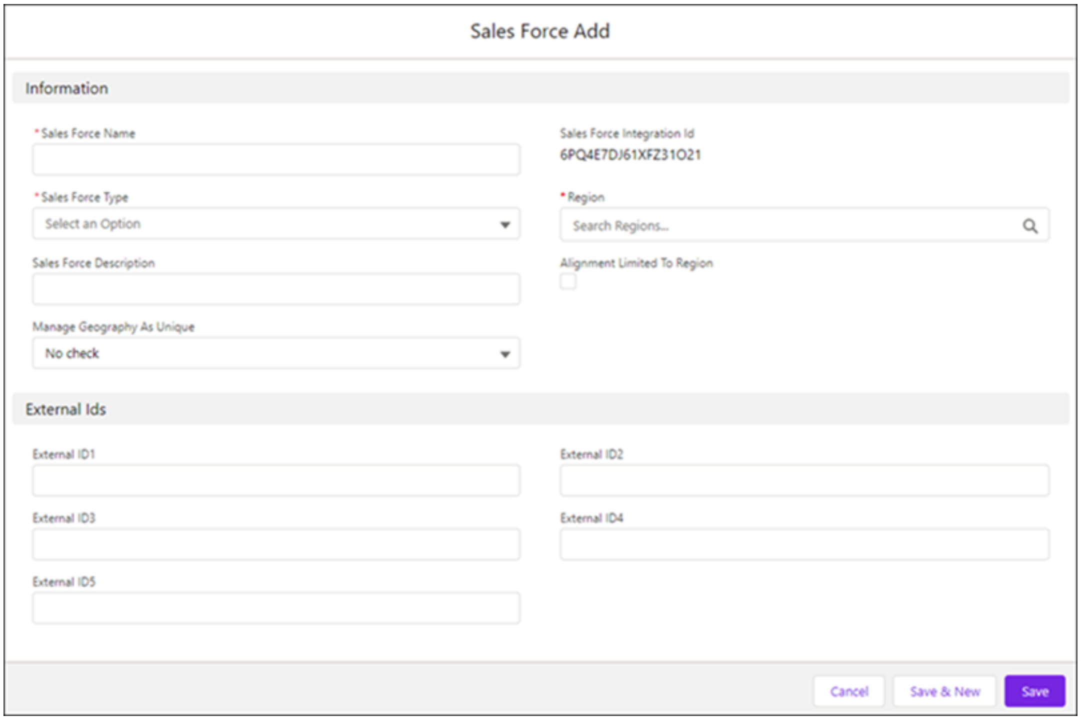
- Click the **Sales Forces** tab and select **Add** for the transaction you want to add to the scenario.



4. Depending on which sales force transaction you selected, do one of the following:

Note: For details on adding product sales forces transactions to the scenario, see Add a Product Alignment Transaction to a Scenario

- ***For Sales Forces***, enter details of the sales force, and then click **Save**.

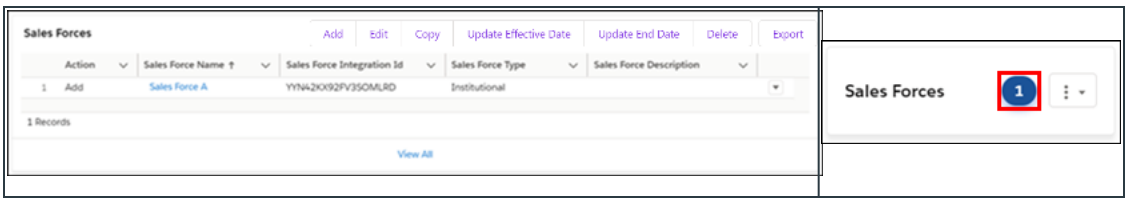


  - **Sales Force Name**: Enter the name of the sales force.
  - **Sales Force Integration ID**: System -generated sales force identification number.
  - **Sales Force Type**: Type of sales force, such as Institutional, Key Opinion Leader, or Retail.
  - **Region**: The region the sales force is aligned to.
  - **Sales Force Description**: Enter a description of the sales force.
  - **Alignment Limited to Region**: In multi-region implementations, when this box is checked, the dynamic alignment engine will ensure that the account's country and territory region match. In some instances, it may be acceptable to have an account from a different country/region assigned to the territory.

- **Manage Geography as Unique**: Select how to manage geographies aligned to more than one territory in the same sales force. *No check* (no warning/error message if the geography is already aligned to another territory in the same sales force). *Warning* (warning message displays upon geography/territory alignment if the geography is already aligned to another territory in the same sales force). *Error* (error message displays and a second geography/territory alignment is not allowed if the geography is already aligned to another territory in the same sales force).

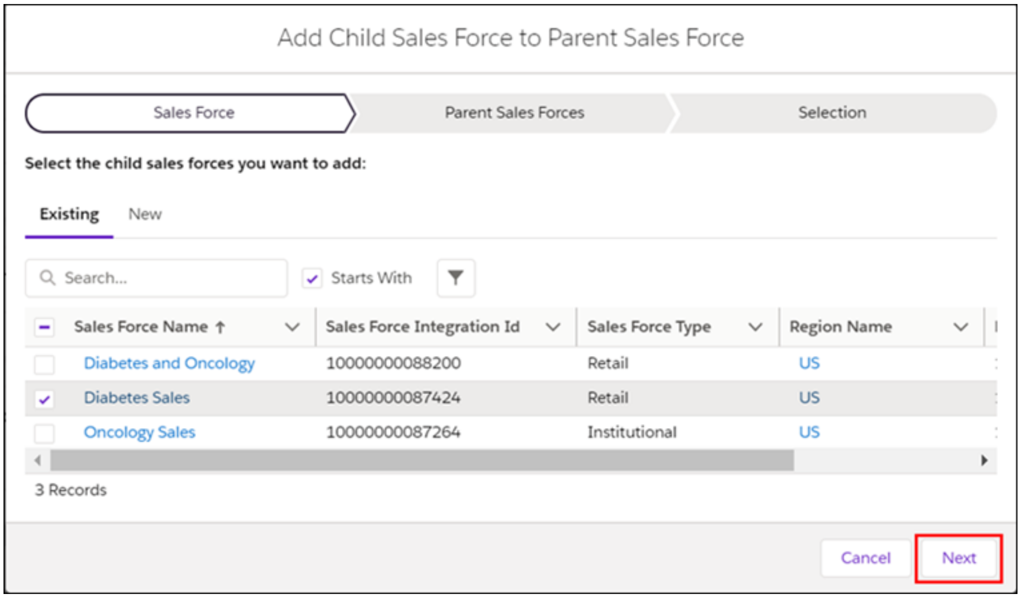
- **External ID1—ID5**: If applicable, enter additional identification numbers for cross referencing.

The sales force transaction is added to the **Sales Forces** section in the **Sales Forces** tab and is indicated on the transaction card in the **Overview** section of the **Details** tab.

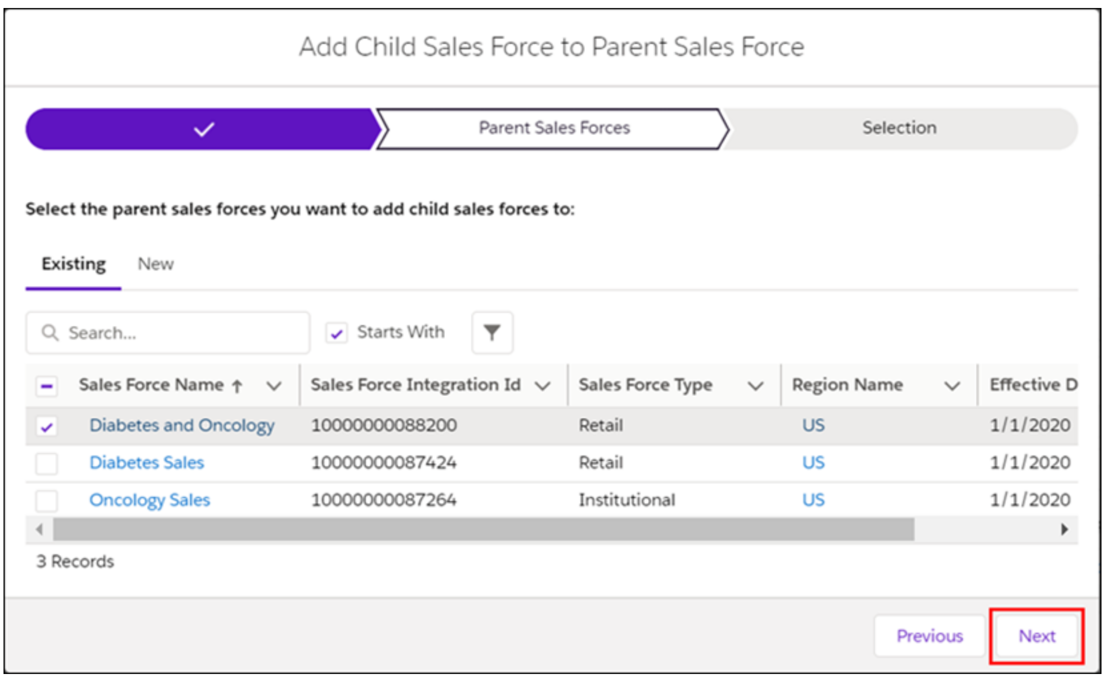


- ***For Sales Force Hierarchies***, select the check boxes next to the child sales forces you want to add to the parent sales force, and then click **Next**.

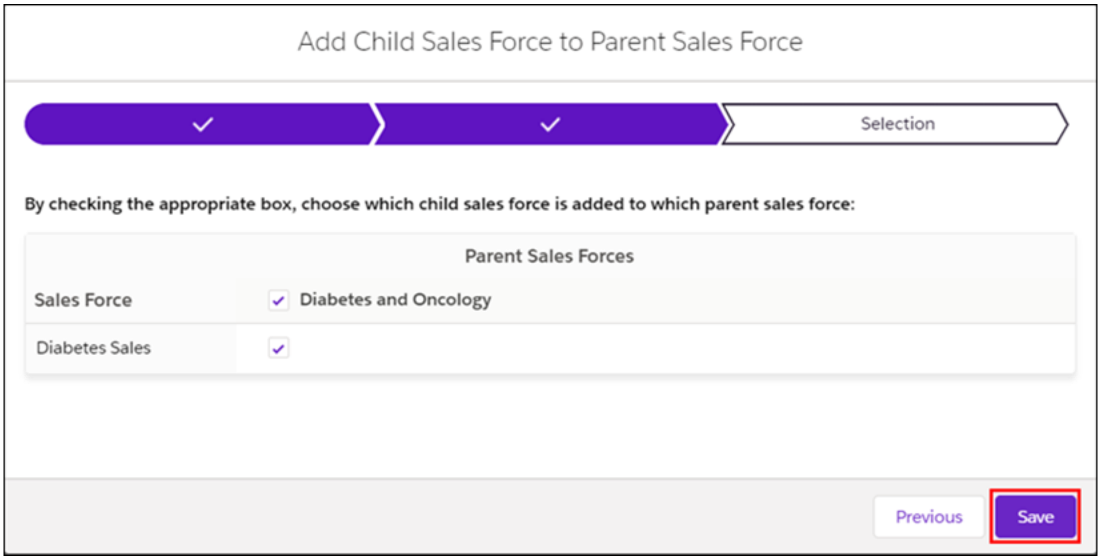
Note: The **Existing** tab contains all current sales forces in the database, and the **New** tab contains sales forces that were just created in the current scenario.



5. ***For Sales Force Hierarchies***, select the check boxes next to the parent sales forces you want to add child sales forces to, then click **Next**.

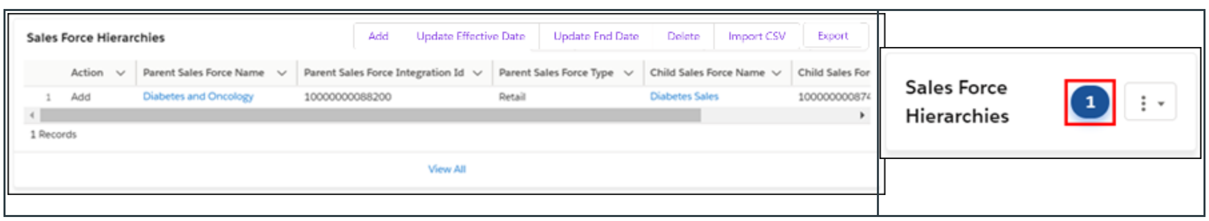


6. ***For Sales Force Hierarchies***, choose which child sales force is added to which parent sales force by selecting the appropriate check box for the child sales force under the appropriate parent sales force.



7. Click **Save**.

   The sales force hierarchies transactions are added to the **Sales Force Hierarchies** section in the **Sales Forces** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.



Add an Engagement Plan Transaction to a Scenario

HO users add engagement plans as part of creating a scenario.

Note: You must have Engagement Plan Management permissions to add an engagement plan transaction to a scenario.

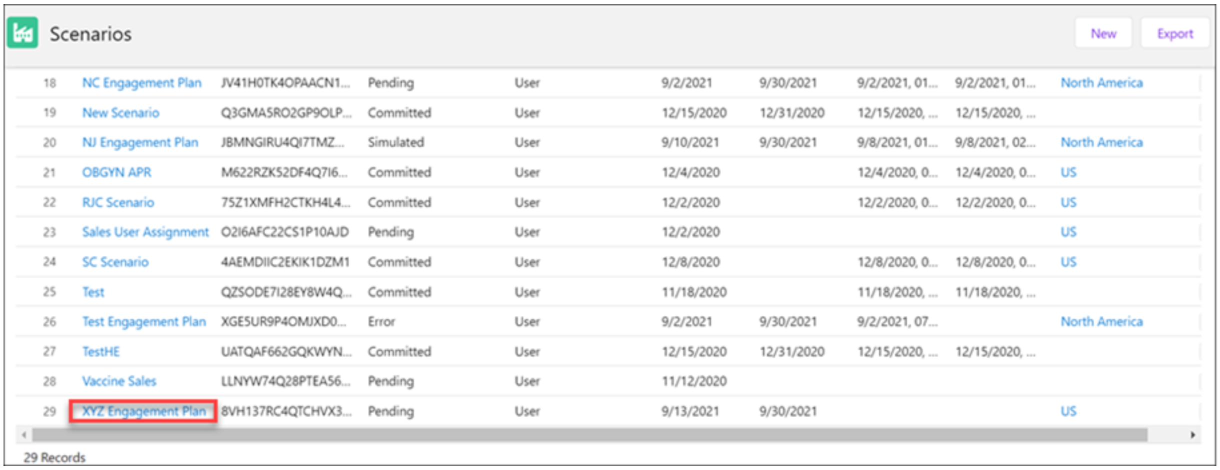
Note: You must set up at least one simulated Account Rule within the scenario before you can create an engagement plan.

Note: Engagement plans are only created for future dates. (Upon scenario creation, the **Effective Date** must be greater than today's date.) See View Scenario Information

To add an engagement plan transaction to a scenario

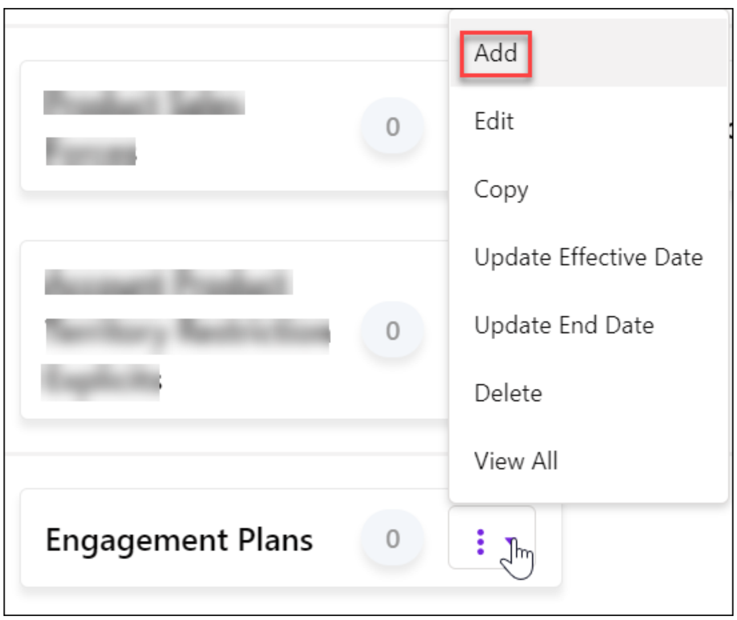
1. Click **Scenarios** from the primary navigation bar.

2. From the Scenarios screen, select the scenario you want to add transactions to.

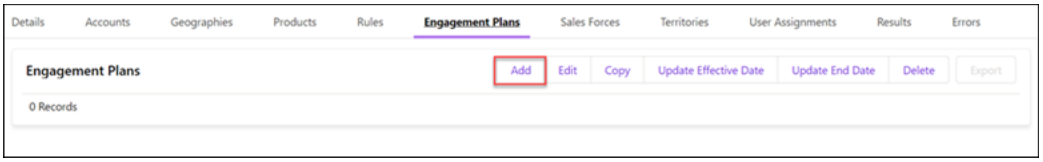


3. Do one of the following:

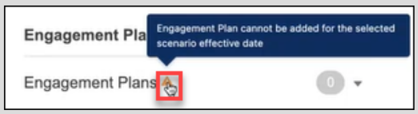
- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction you want to add to the scenario, then select **Add**.

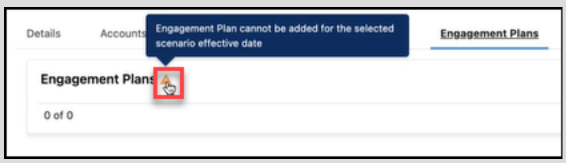


- From the **Engagement Plans** tab, click **Add**.

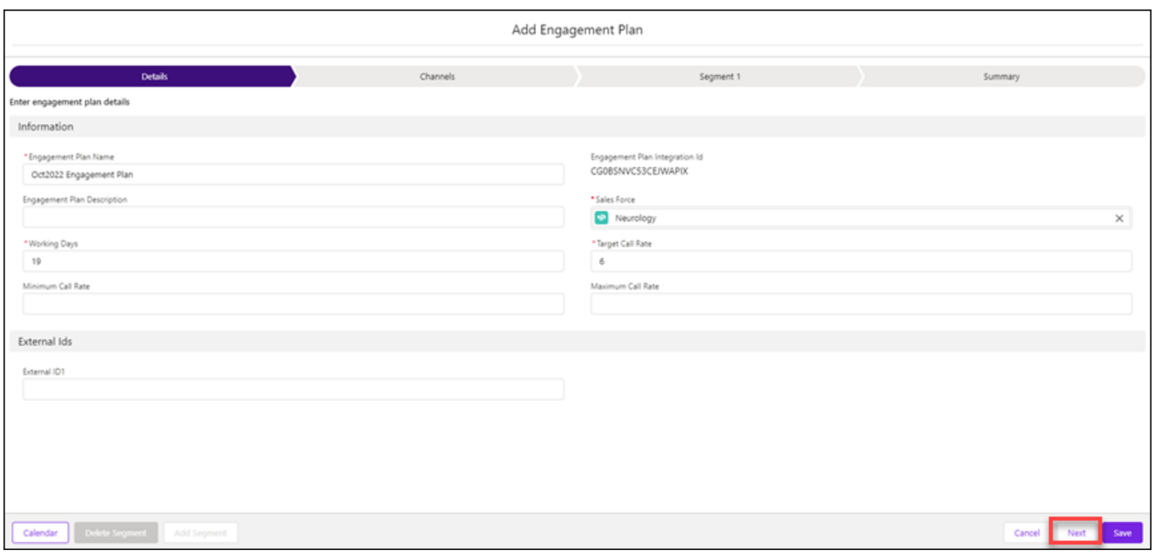


Note: If an engagement plan cannot be added to the scenario, an icon displays on the **Scenario Details** and **Engagement Plans** tabs. Click the icon for more information about why the plan can't be added.





4. Enter details of the engagement plan, then click **Next**.

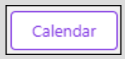
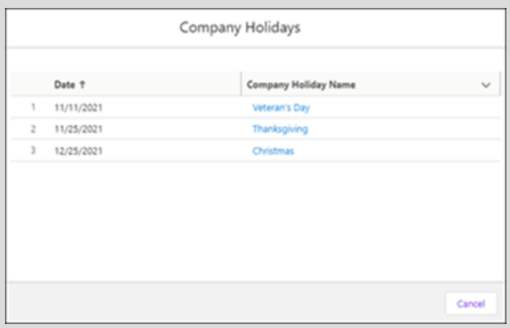


- **Engagement Plan Name**: Enter the name of the engagement plan.
- **Engagement Plan Integration Id**: System-generated engagement plan identification number.

- **Engagement Plan Description**: An optional description that defines the engagement plan.
- **Sales Force**: The name of the sales force the engagement plan is aligned to.

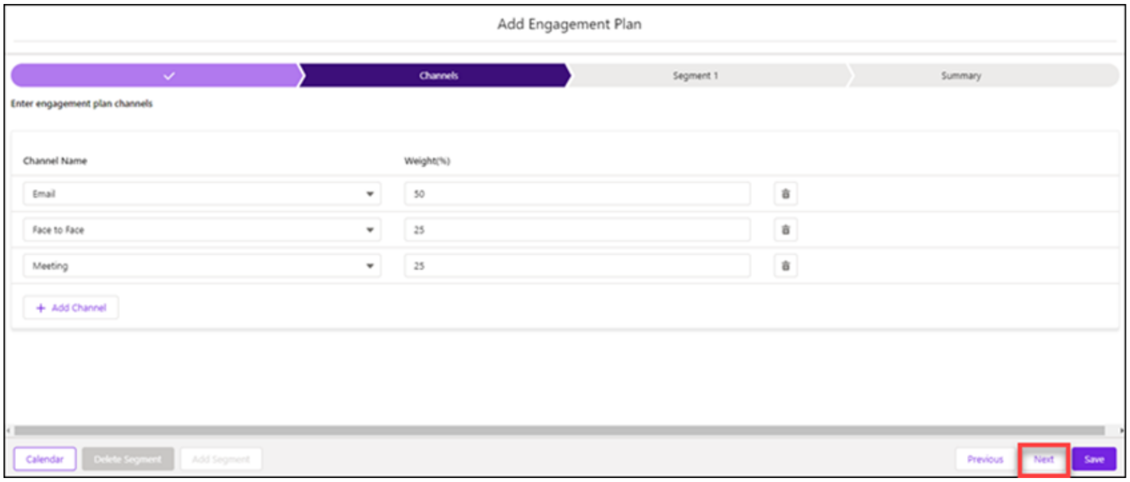
> **Note:** Each sales force can only be included in one active engagement plan.

- **Working Days**: Number of actual days worked. Engagement plan is calculated as the number of days from scenario **Effective Date** and this number minus the holidays defined in the company calendar.

> **Note:** Use the 
>
> button to display the region's company holidays for help in calculating working days. This button is available after all required fields on the **Details** tab are populated.
>
> 
>

- **Target Call Rate**: The targeted number of calls for this engagement plan.
- **Minimum Call Rate**: The minimum number of calls for this engagement plan.
- **Maximum Call Rate**: The maximum number of calls for this engagement plan.
- **External ID1—ID5**: If applicable, enter additional identification numbers for cross referencing.

5. Enter channel information for the engagement plan, then click **Next**.

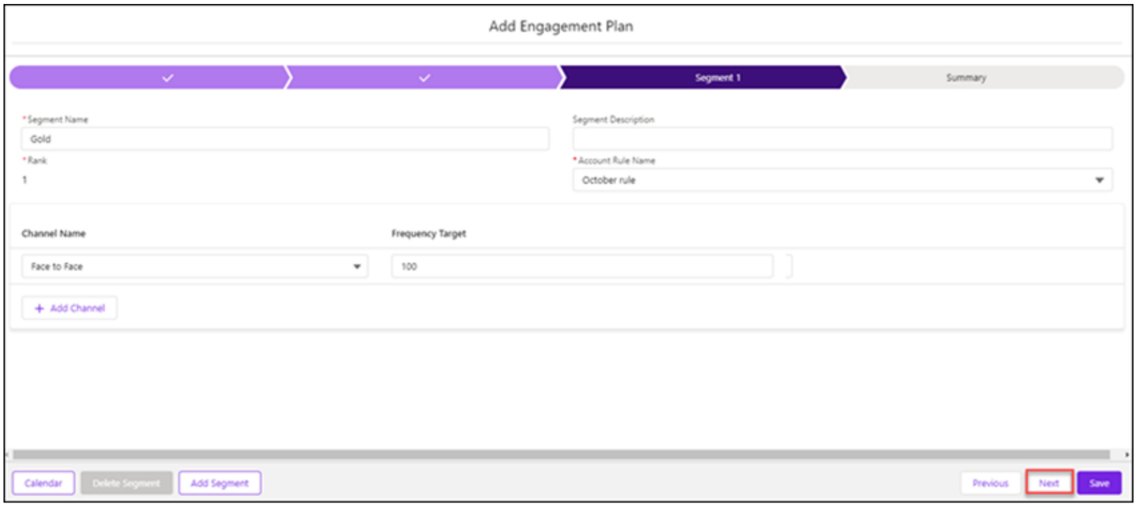


- **Channel**: Select the communication channel for the engagement plan. Default options include *Face to Face*, *Meeting*, *Remote Detailing*, or *Email*. You can have as many channels as there are channel types.
- **Weight (%)**: Enter a percentage of the importance of the channel. The weight across all channels must equal 100%. For example, if only one channel exists, the weight is 100%. If there are three channels for the engagement plan, the first could be 50% and the second and third each 25%.

Note: To add a channel(s), click **Add Channel**.

Note: To delete a channel, click **Delete** next to the corresponding channel.

6. Enter Segment information for the engagement plan, then click **Next**.



- **Segment Name**: Enter the segment name. For example, you could enter *Gold* as Segment 1 if you use *Gold*, *Silver*, and *Bronze* as differentiating segment tiers.
- **Segment Description**: Enter a description to help define the segment.
- **Rank**: The system-generated, read-only rank of the segment that displays in the order segments are added. This number corresponds with the name of the **Segment** tab on which you are entering information. For example, **Rank** = *1* on the Segment 1 screen, **Rank** = *2* on the Segment 2 screen, etc.
- **Account Rule Name**: Select the account rule that applies to the segment. Rules that display include those where **Account Rule Scope** is *Engagement Plan* or *Alignments+Engagement Plan*.
- **Channel Name**: Select the channel (defined in the previous step) that applies to the segment.

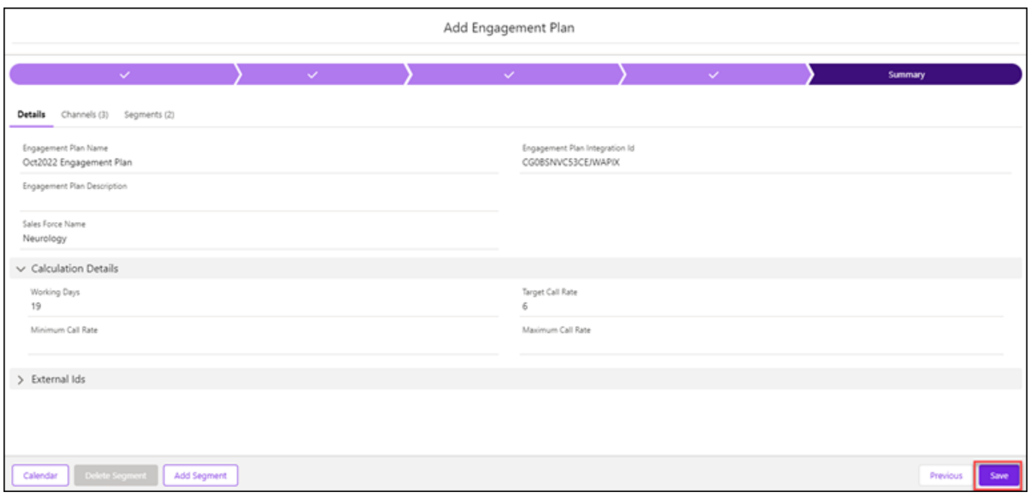
- **Frequency Target**: Enter the intended number of contact attempts for the segment.

> **Note:** To add an additional segment for the engagement plan, click **Add Segment**. An additional Segment screen appears, where you can enter information for the segment. You can add an unlimited number of segments.

> **Note:** To delete a segment, click **Delete Segment** on the corresponding segment screen.

7. Review the **Details** tab, **Channels** tab, and **Segments** tab of the Summary screen, then click **Save** to create the engagement plan.

> **Note:** Use the **Next** and **Previous** buttons to navigate screens to make changes before saving.

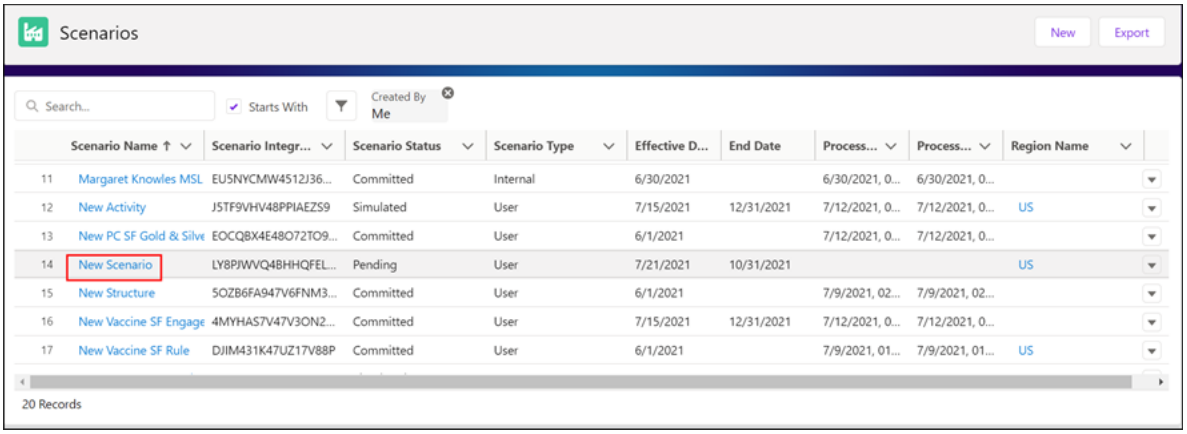


Add a Territory Transaction to a Scenario

After you create a scenario, you can add transactions to it.

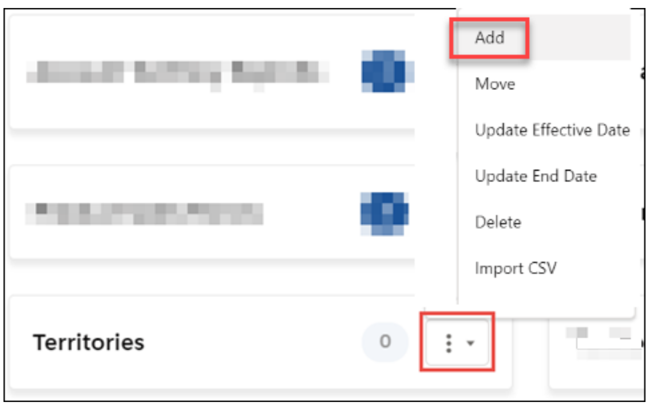
To add a territory transaction to a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.

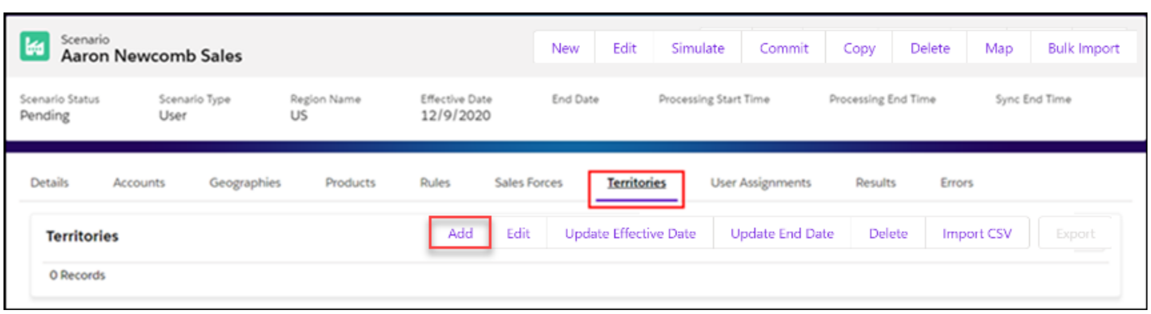


3. Do one of the following:

   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction you want to add to the scenario, and then select **Add**.

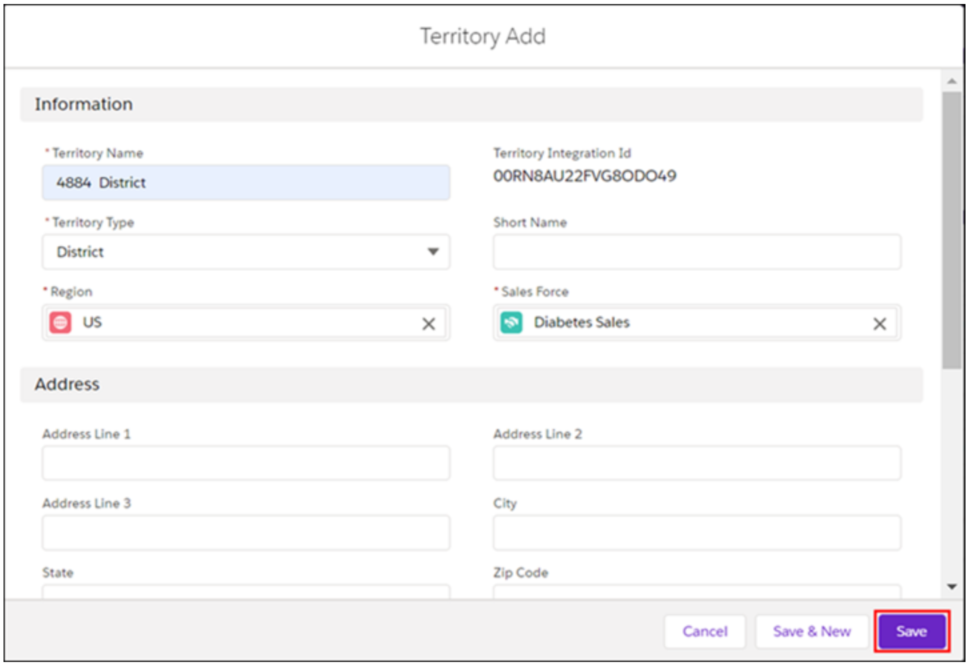


   - Click the **Territories** tab and select **Add** for the transaction you want to add to the scenario.



4. Depending on which territories transaction you selected, do one of the following:

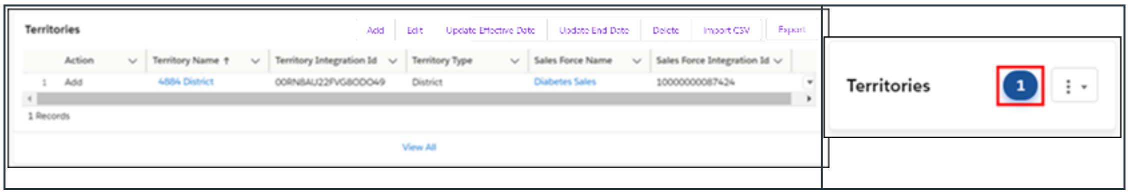
- For ***Territories***, enter details of the territory, and then click **Save**.



- **Territory Name**: Enter the name of the territory.
- **Territory Integration ID**: System -generated territory identification number.
- **Territory Type**: Select *Territory*, *District*, *Region*, *Area*, or *Business Unit*.
- **Short Name**: A further classification of territory type.
- **Region**: Select the region the territory is specific to.
- **Sales Force**: Select the sales force the territory is specific to.
- **Address Line 1**: Enter the street address of the territory.
- **Address Line 2**: Enter additional address information, if applicable.
- **Address Line 3**: Enter additional address information, if applicable.
- **City**: Enter the city where the territory is located.
- **State**: Enter the state where the territory is located.
- **Zip Code**: Enter the postal code of the city where the territory is located.

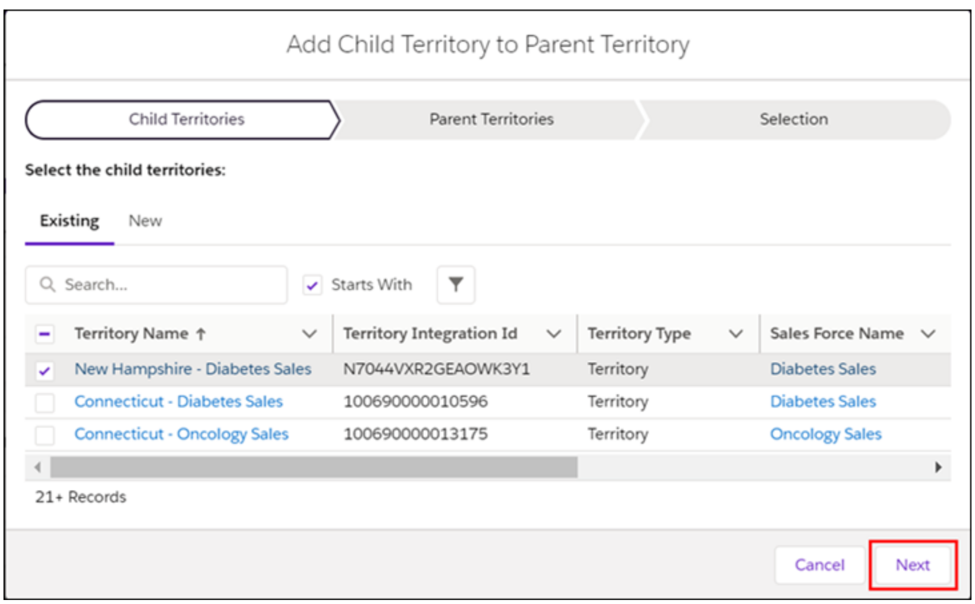
- **Extension**: Enter the delivery route code.
- **Country**: Select the country where the territory is located.
- **External ID1—ID5**: If applicable, enter additional identification numbers for cross referencing.

The territory transaction has been added to the **Territories** section in the **Territories** tab and is indicated on the transaction card in the **Overview** section of the **Details** tab.

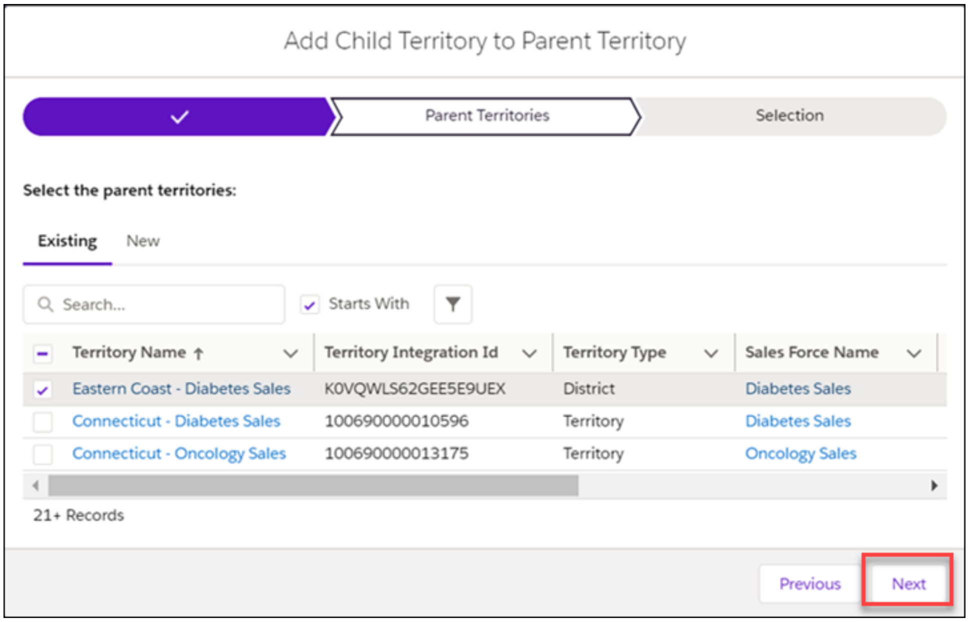


- For ***Territory Hierarchies***, select the check boxes next to the child territories you want to add to the parent territory, then click **Next**.

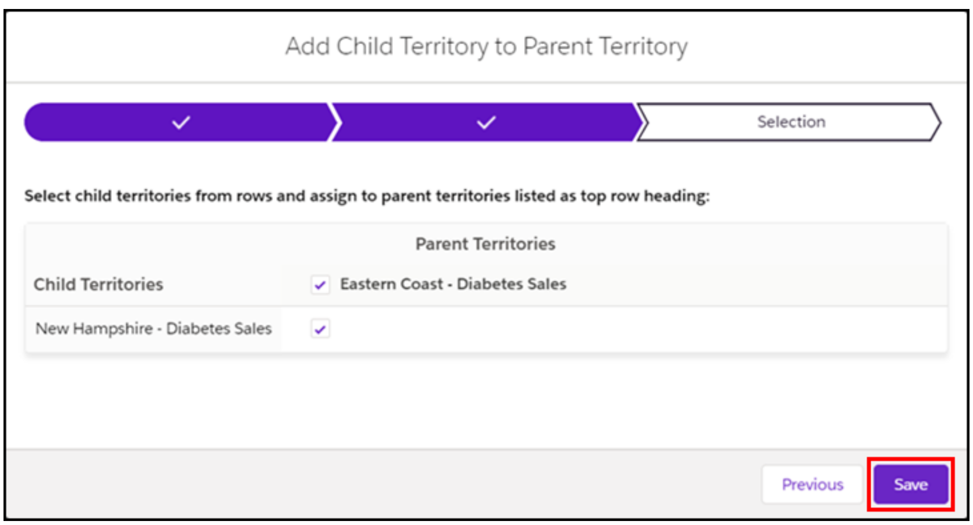
> **Note:** The **Existing** tab contains all current territories in the database and the **New** tab contains territories that were just created in the scenario, if any were created.



5. For **Territory Hierarchies**, select the check boxes next to the parent territories you want to add the child territories to, and then click **Next**.

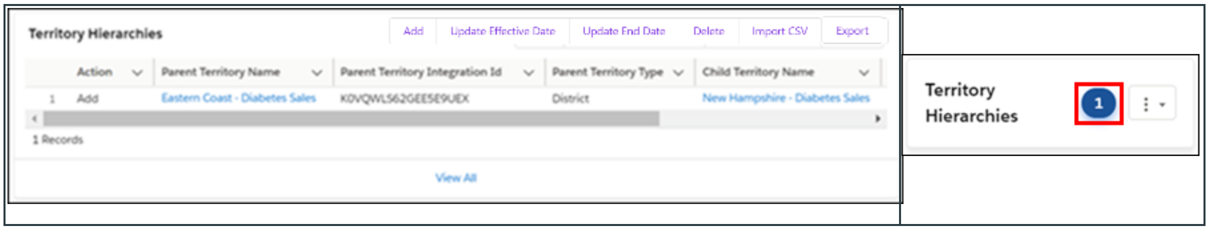


6. For ***Territory Hierarchies***, choose which child territories are added to which parent territories by selecting the appropriate check box for the child territories under the appropriate parent territories.



7. Click **Save**.

   The territory hierarchies transactions are added to the **Territory Hierarchies** section in the **Territories** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.

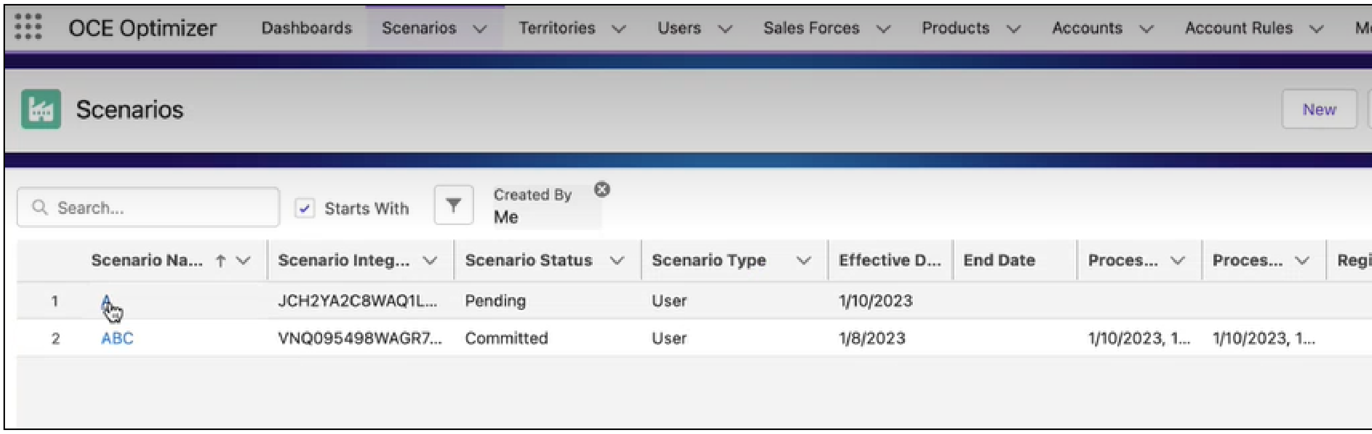


Add a User Assignment to a Scenario

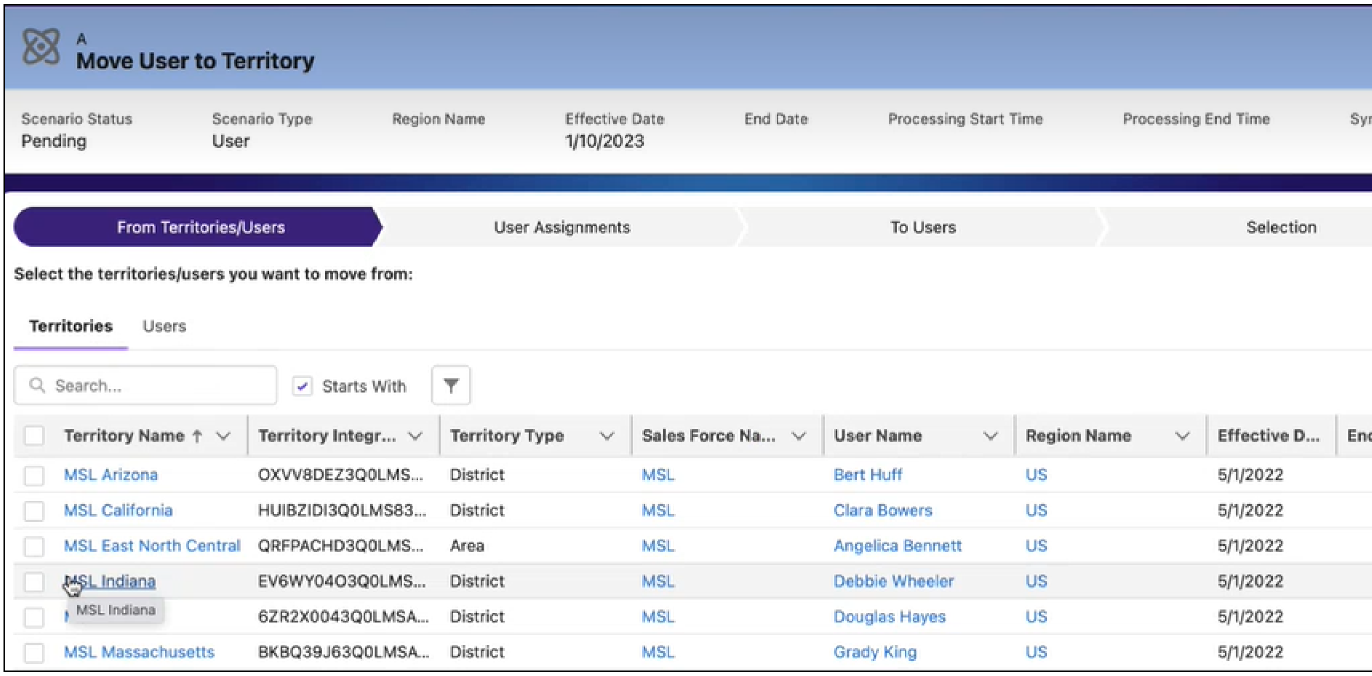
After you create a scenario, you can add transactions to it. You can start with either territories or users.

To add a user assignment transaction to a scenario starting with territories

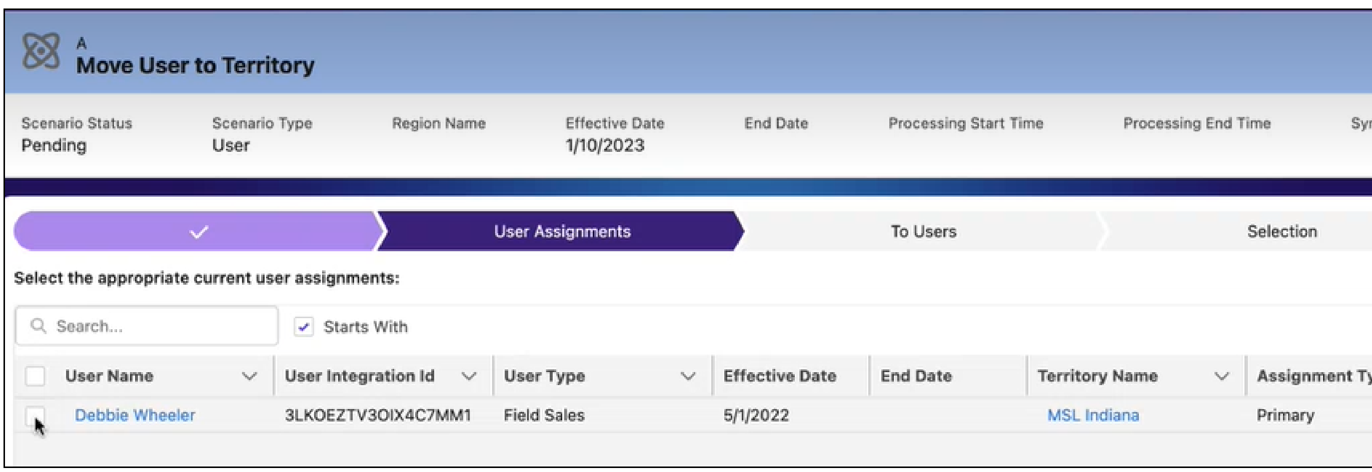
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.



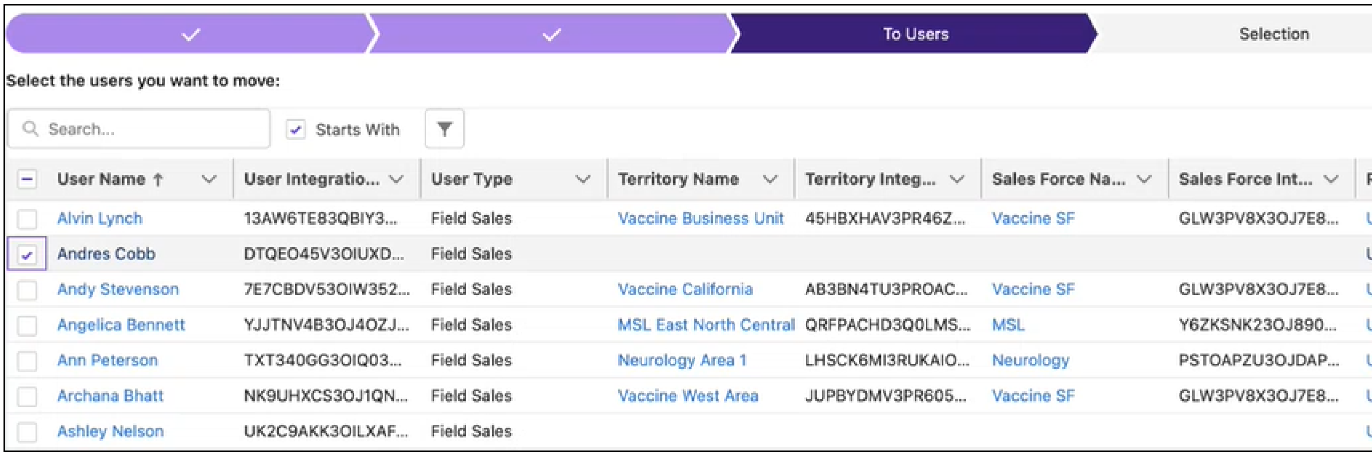
3. At the top of the Scenario page, click **User Assignments**.
4. On the User Assignments page, click **Move**.
5. On the Move User to Territory page, in the **From Territories/Users** step, click **Territories**, select a territory, and click **Next**



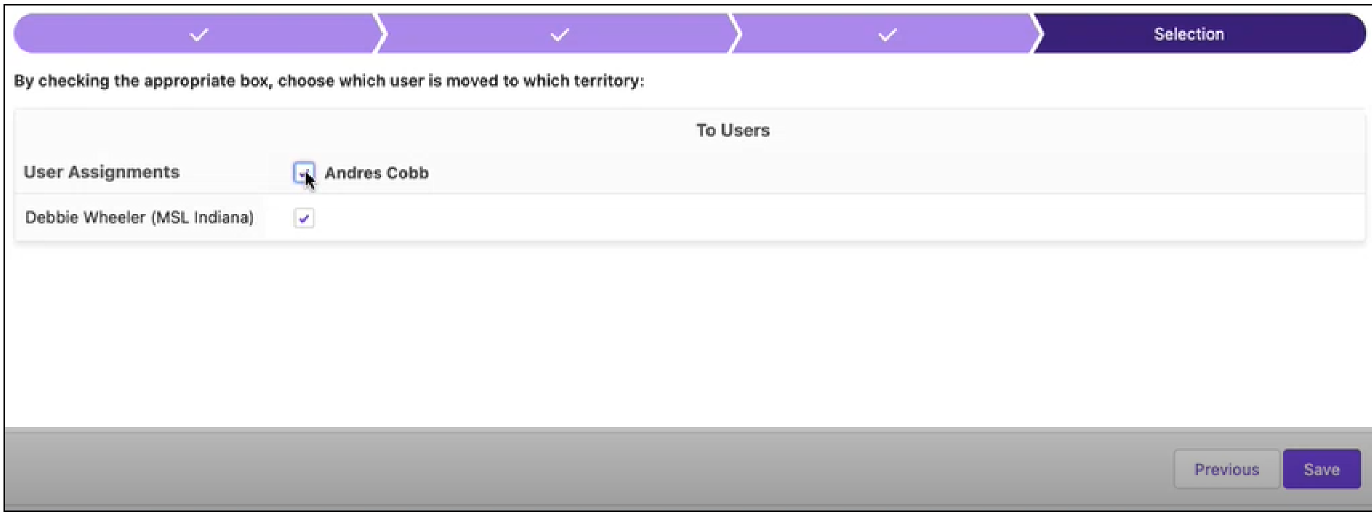
6. The User Assignments step shows the current user assignment(s) for the territory. Select the user and click **Next**.



7. In the **To Users** step, select the user you want to assign to the territory and click **Next**.



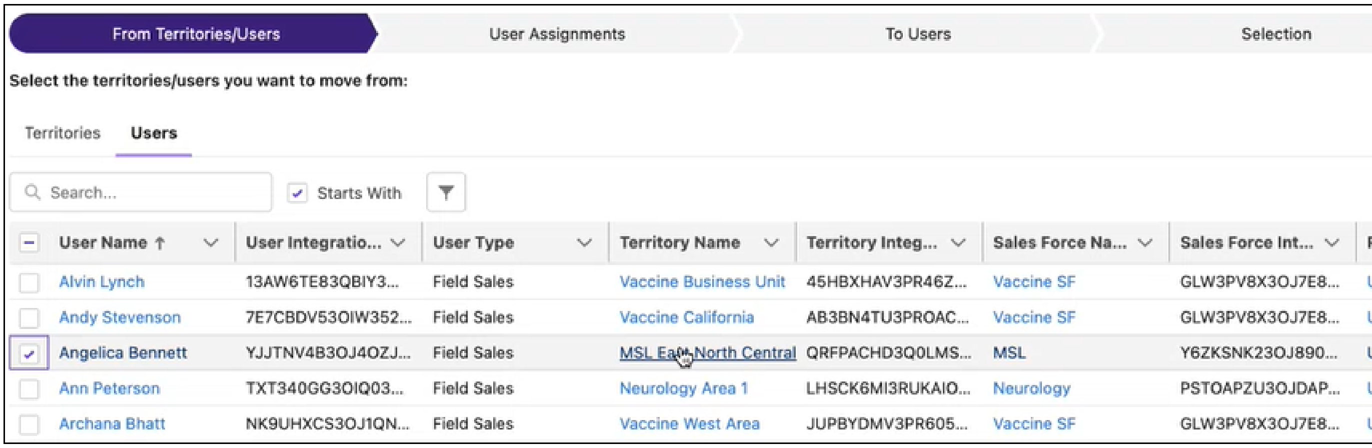
8. In the **Selection** step, select the user you've chosen and click **Save**.



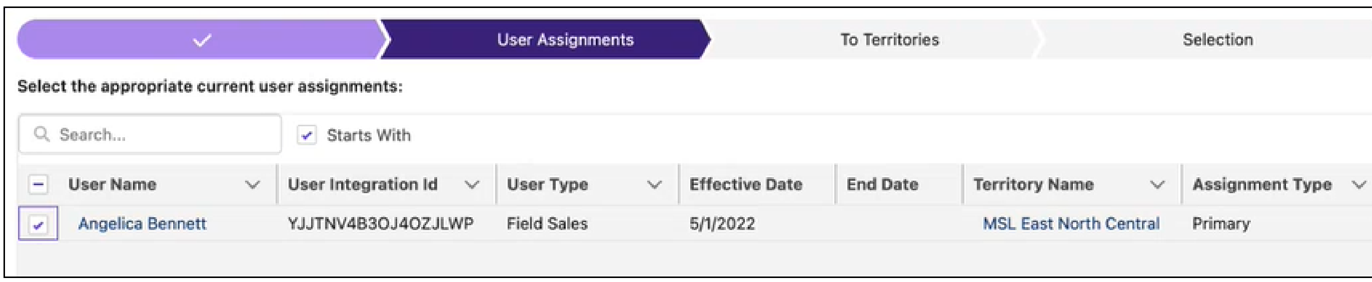
To add a user assignment transaction to a scenario starting with users

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.
3. At the top of the Scenario page, click **User Assignments**.
4. On the User Assignments page, click **Move**.
5. On the Move User to Territory page, in the **From Territories/Users** step, click **Users**, select a user, and click **Next**

> **Note:** A territory can have only one user assigned as primary unless the configuration allows more than one primary.

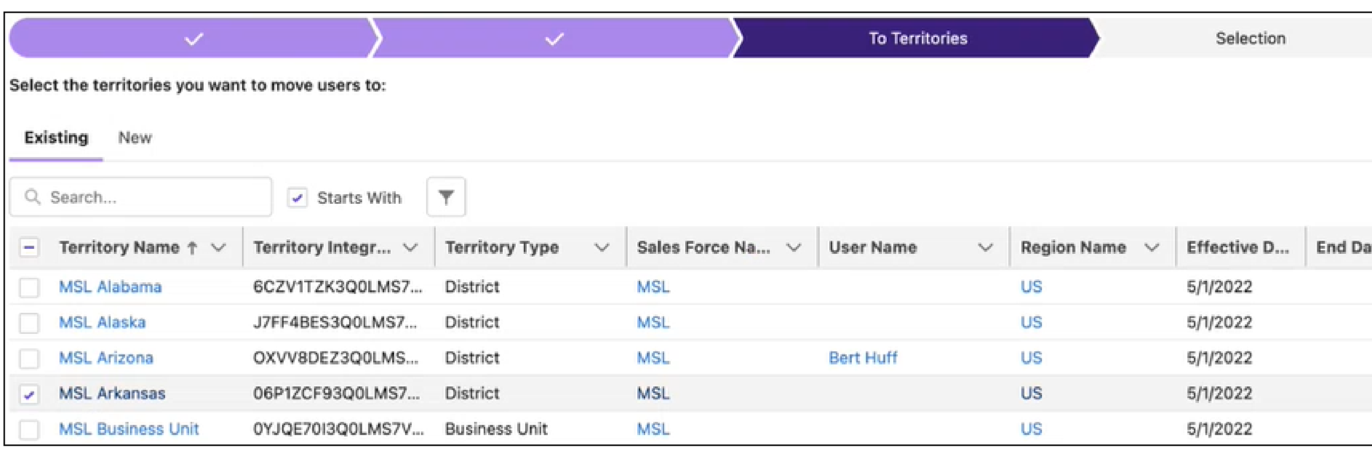


6. The User Assignments step shows the current user assignment(s) for the territory. Select the user and click **Next**.

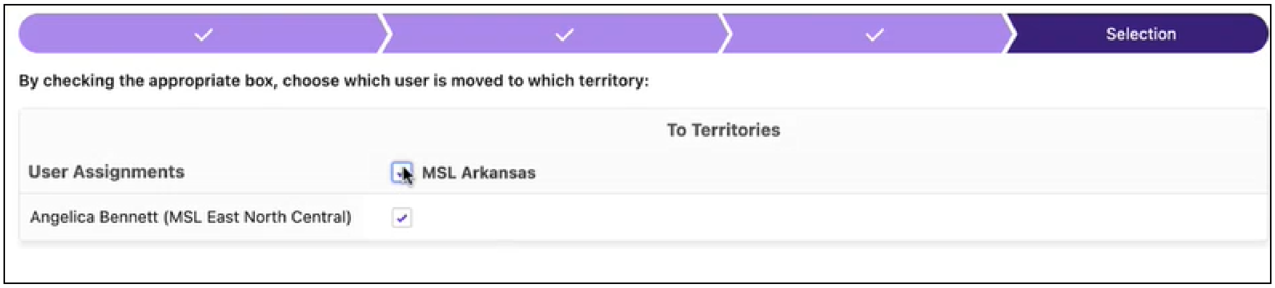


7. In the **To Territories** step, select the territory you want to assign the user to and click **Next**.

> **Note:** The **Existing** tab contains all current territories in the database and the **New** tab contains territories that were just created in the current scenario.



8. In the **Selection** step, select the user you've chosen and click **Save**.



Import Data into a Scenario

You can import data into a scenario by uploading it as a CSV file or by importing data in bulk using a Microsoft® Excel® file.

Any transactions that can be added to a scenario in the OCE Optimizer user interface can also be added by uploading a CSV file. A CSV (comma-separated values) file is a simple text file in which information is separated by commas. The CSV file format is defined at run time and is auto-mapped, if possible. If auto-mapping is not possible because fields names don’t match between the CSV file and OCE Optimizer attribute names, then you can map it at run time.

The bulk import feature allows you to import data into a scenario using a single Excel file with multiple tabs. A template is available for download from within the feature that includes all scenario objects and fields. Required fields in the template are highlighted in red. All data within the file should apply based on the Scenario effective date and end date.

See:

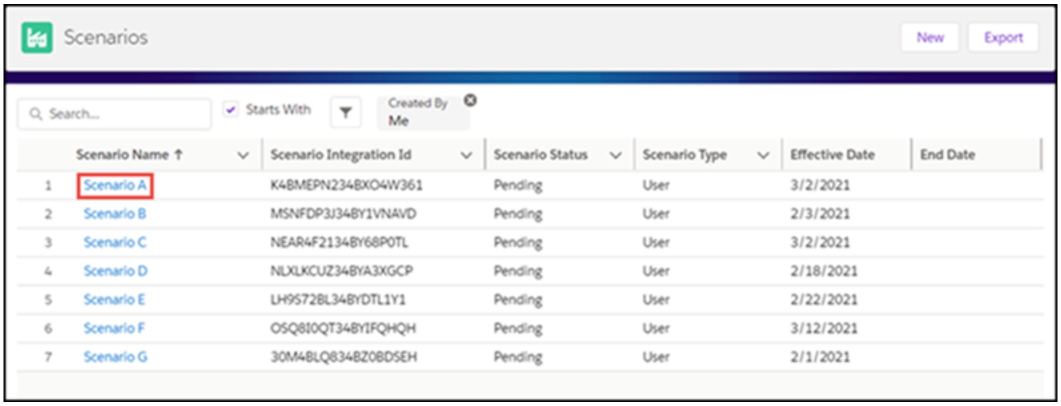
- Import Scenario Data Using CSV Files
- Bulk Import Data into a Scenario

Import Scenario Data Using CSV Files

To import data into a scenario using a CSV file

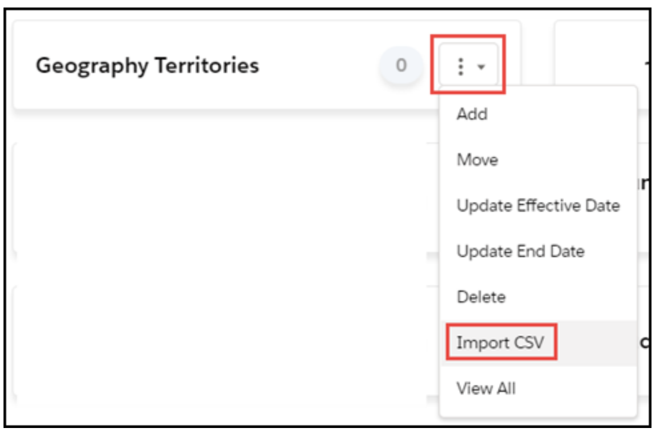
1. Do one of the following:

- Create a new scenario. See Create a New Scenario.
- Open an existing scenario from the Scenarios screen.

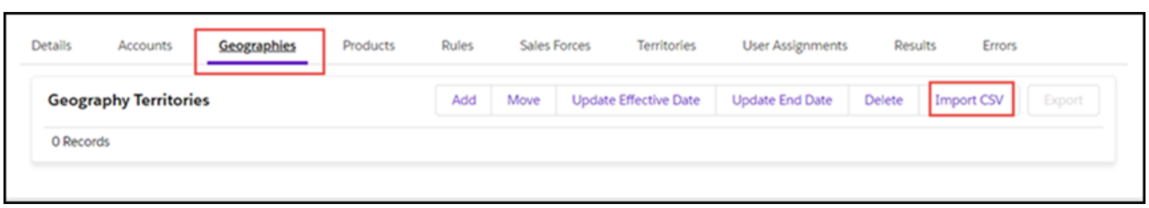


2. Do one of the following:

- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction you would like to import data into, then select **Import CSV**.

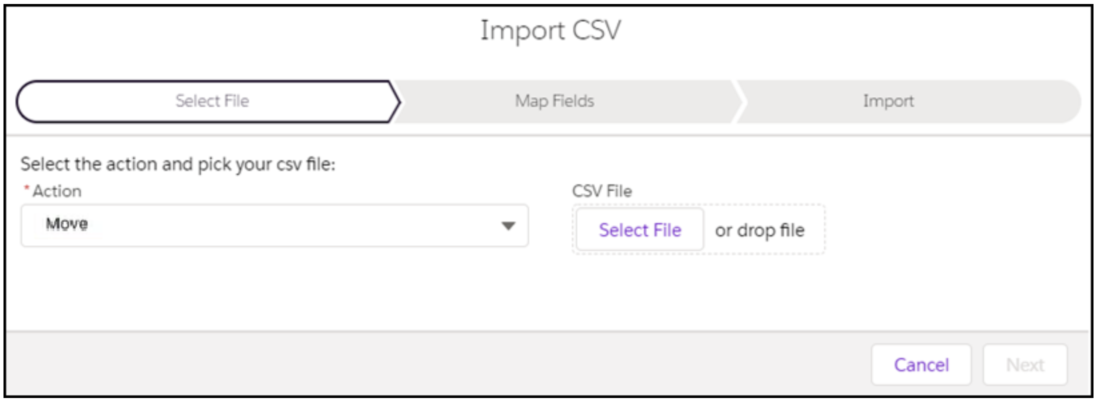


- Click the tab of the transaction type you would like to import data into, then select **Import CSV** for the transaction.



> **Note:** For Account Territory Explicit CSV imports, you can choose to include Account Owner Indicator records.

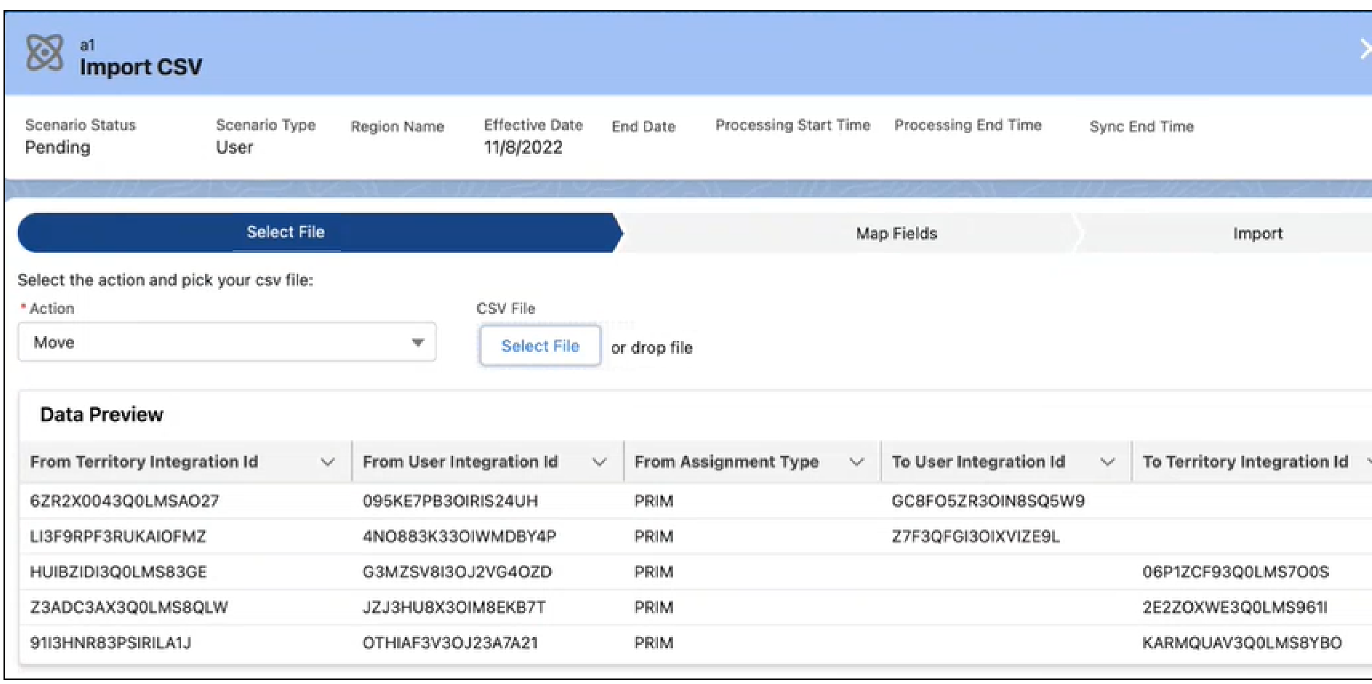
3. Select the type of import action, such as *Add*, *Move*, *Update Effective Date*, *Update End Date*, or *Delete*.



4. Click **Select File**, browse to the file location, select the file, then click **Open**.

5. Verify the data in the Data Preview section, then click **Next**.

> **Note:** You can move a user using either **To User Integration Id** or **To Territory Integration Id**, but not to both.

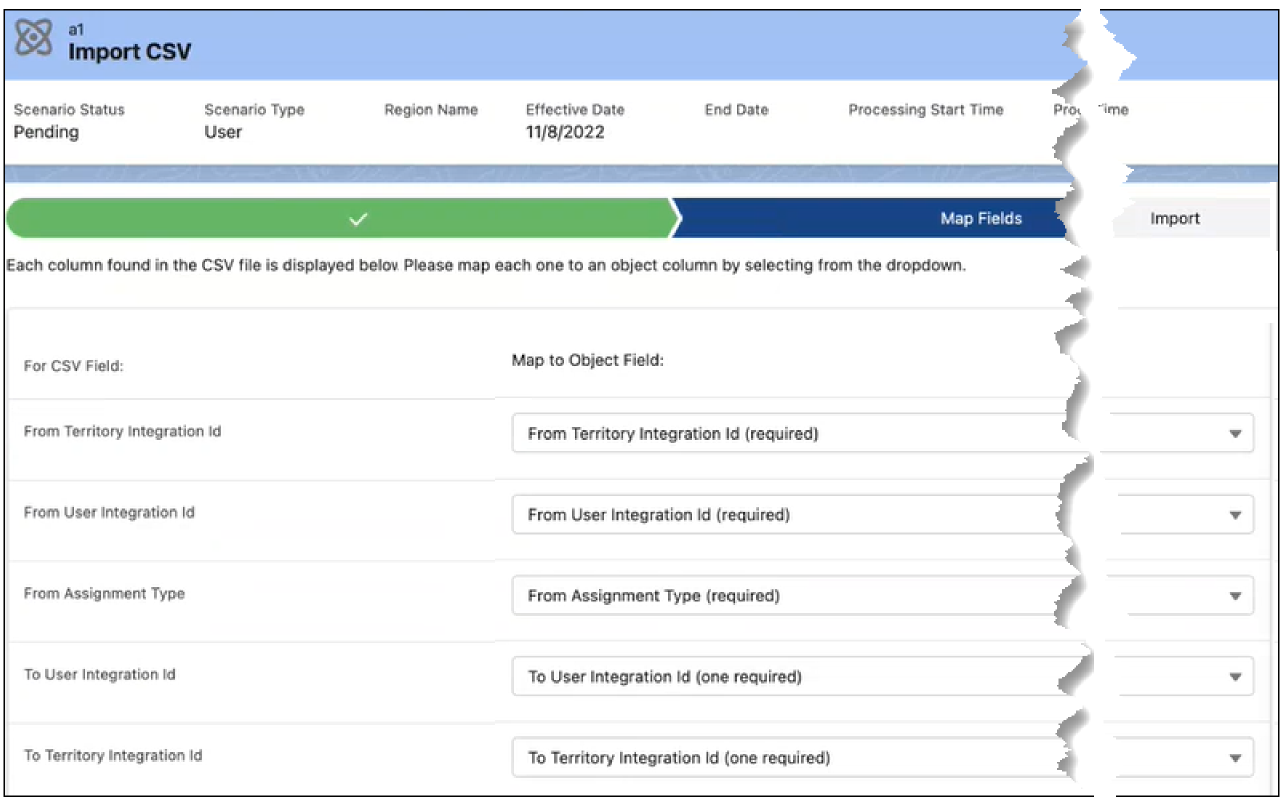


> **Note:** For Sales Force transactions, to update the effective date or end date of a sales force's underlying child records (such as territories, territory hierarchies, account territory alignments) or to delete a sales force's underlying child records:
>
> 1. Ensure the sales forces listed in the Data Preview grid include Cascade=true.
> 2. From the **Action** drop-down box, select *Update Effective Date*, *Update End Date*, or *Delete*.
> 3. Continue with the steps below.

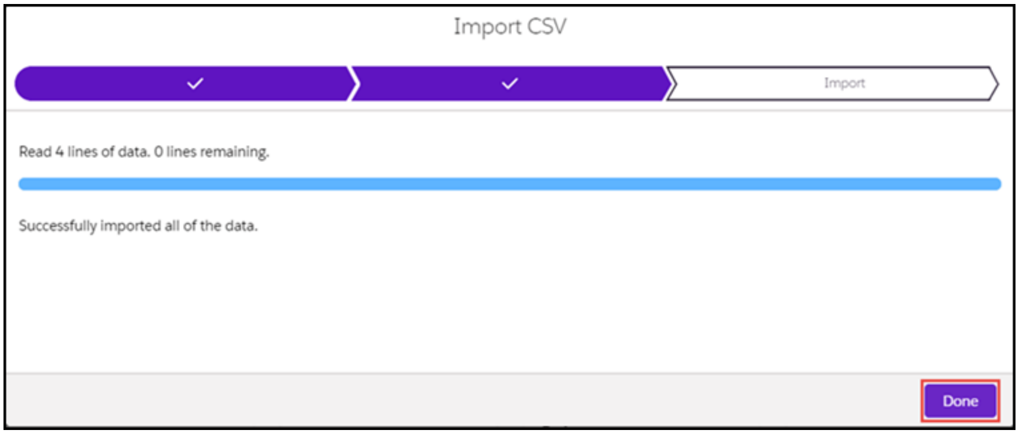
The system automatically maps each column in the CSV file to an Object Field and indicates which fields are required.

6. Keep the automatic mapping or customize the mapping based on the CSV file contents, then click **Next**.

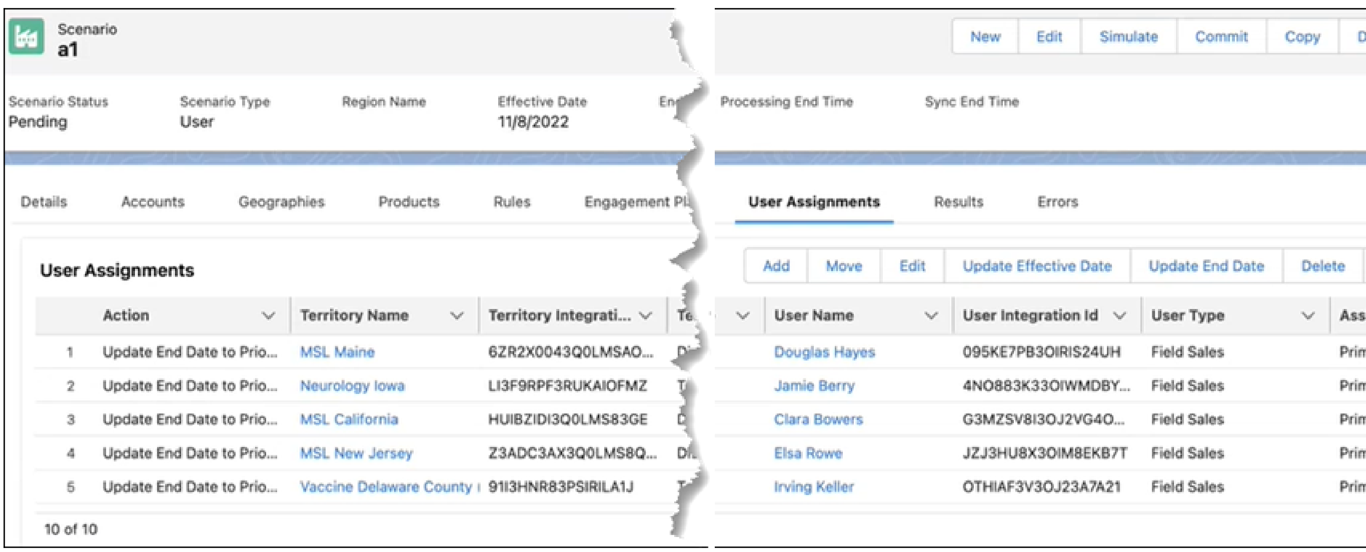
> **Note:** In the **Map to Object** field, you can move a user either **To User Integration Id** or **To Territory Integration Id**, but **not** to both.



7. After the data successfully imports, click **Done**.



The data is added to the scenario.

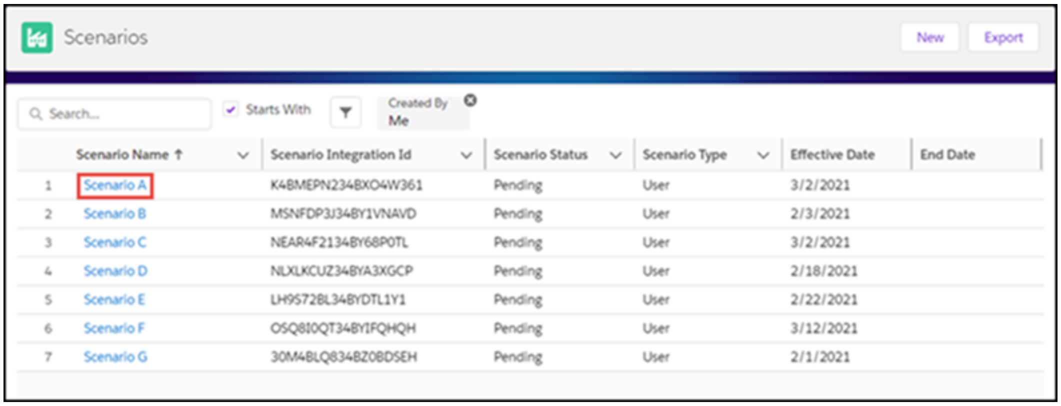


Bulk Import Data into a Scenario

To bulk import data into a scenario

1. Do one of the following:

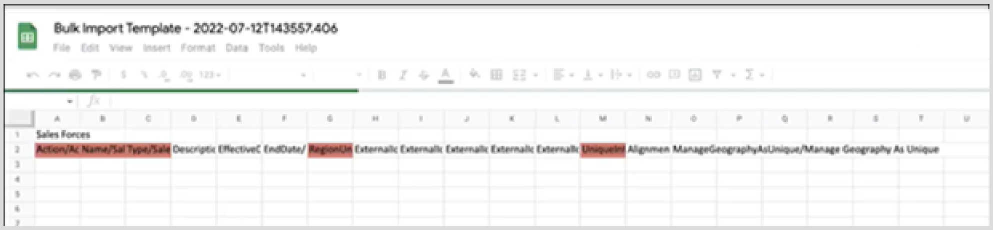
- Create a new scenario. See Create a New Scenario.
- Open an existing scenario from the Scenarios screen.



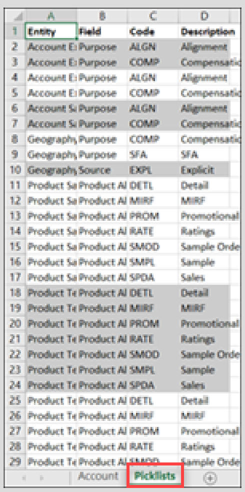
2. Do one of the following:
   - To use an existing Microsoft® Excel® file, go to the next step.
   - To create an Excel data file using a template, click **Download Template**. Open the

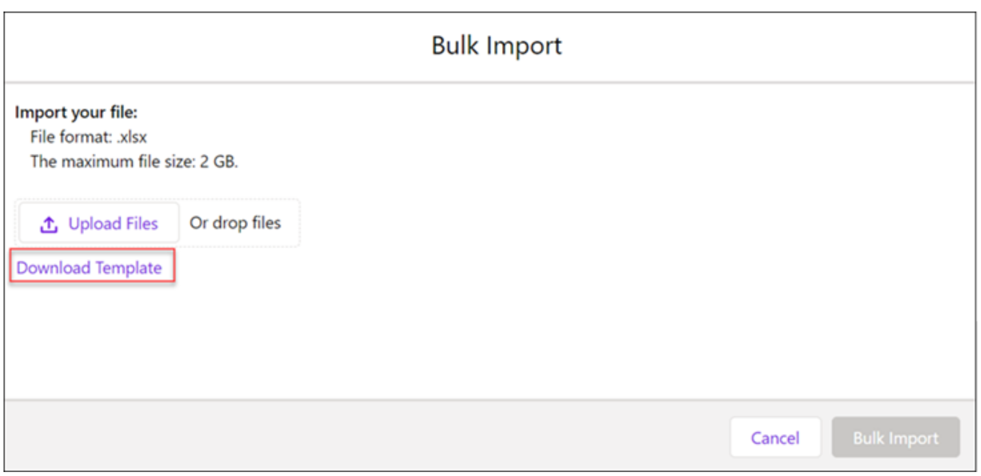
template, populate it with your information, and save the file.

Not- Required fields are highlighted in red within the template.



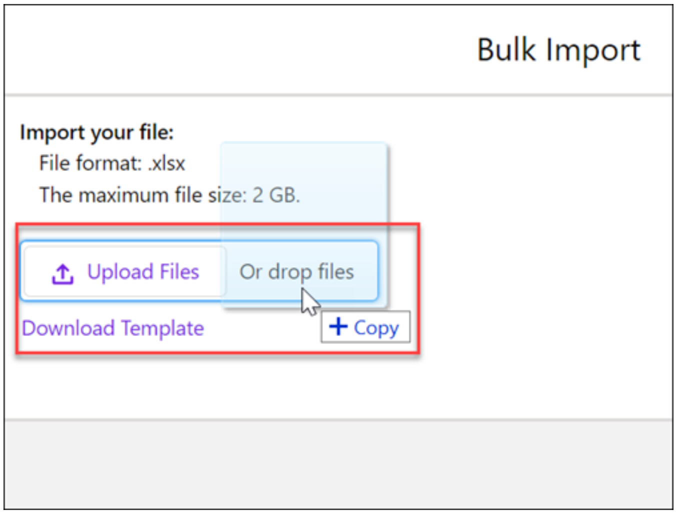
Access the **Picklists** tab on the template to easily reference the code descriptions of pick list values. The tab includes columns **Entity**, **Field**, **Code** and **Description**.



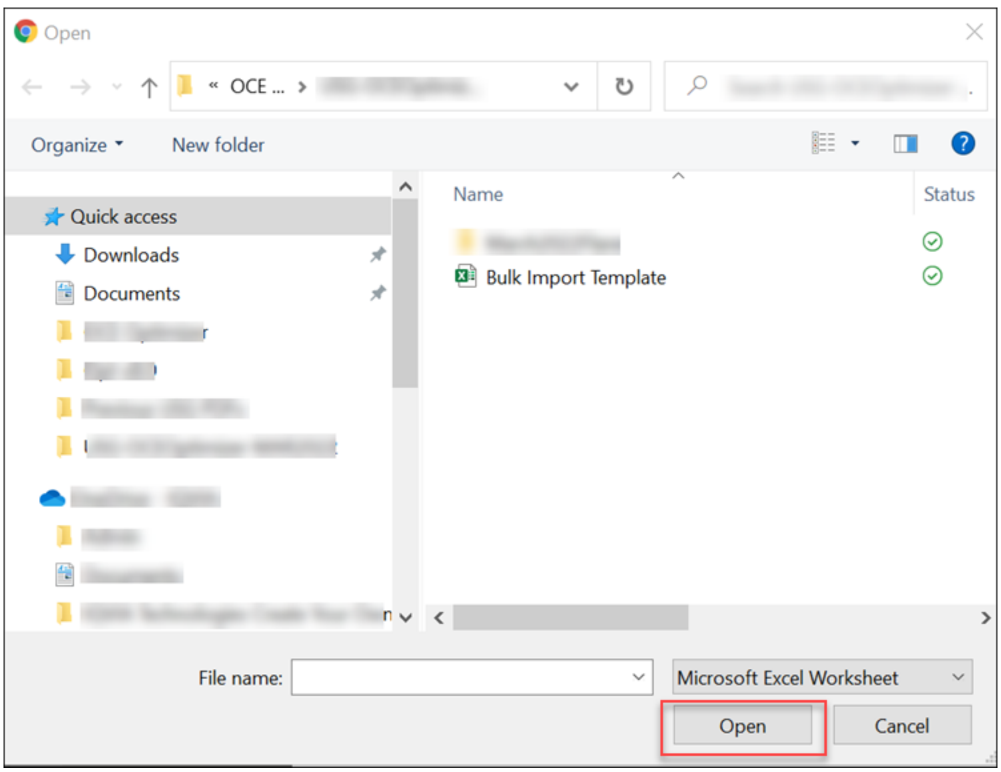


3. Do one of the following:

- Drag and drop the Excel file.

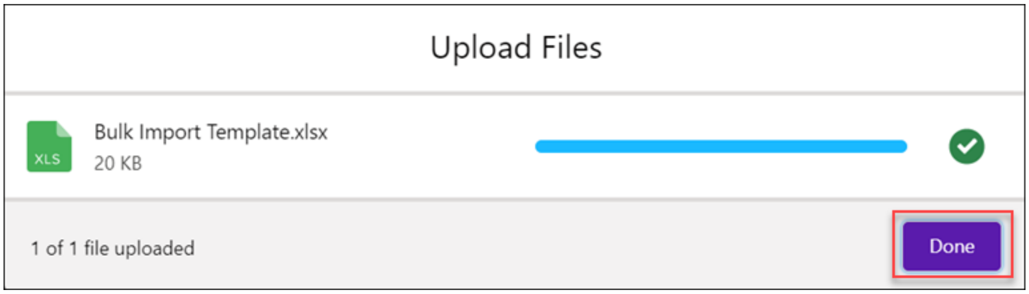


- Click **Upload Files**, select the Excel file to import, and click **Open**.

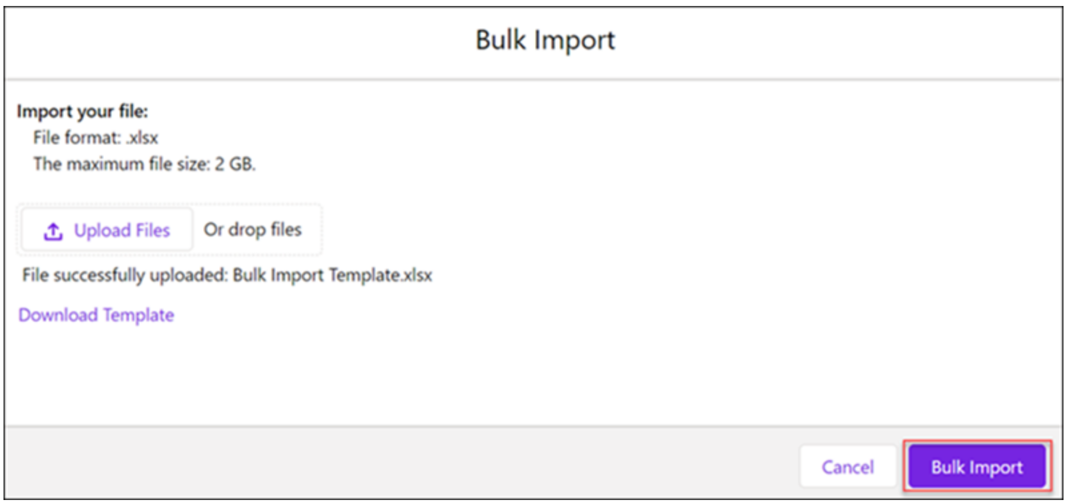


Note: The imported file must have an **.xlsx** extension and cannot be larger than 2 GB.

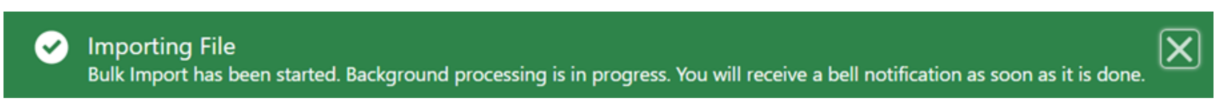
4. Click **Done** after the file uploads.



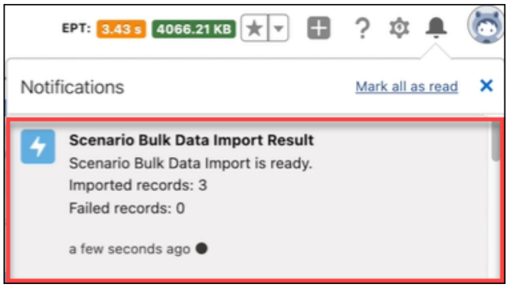
5. Click **Bulk Import**.



After the import starts, an Importing File message appears. When the process completes, a notification appears in the upper-right corner of the screen.



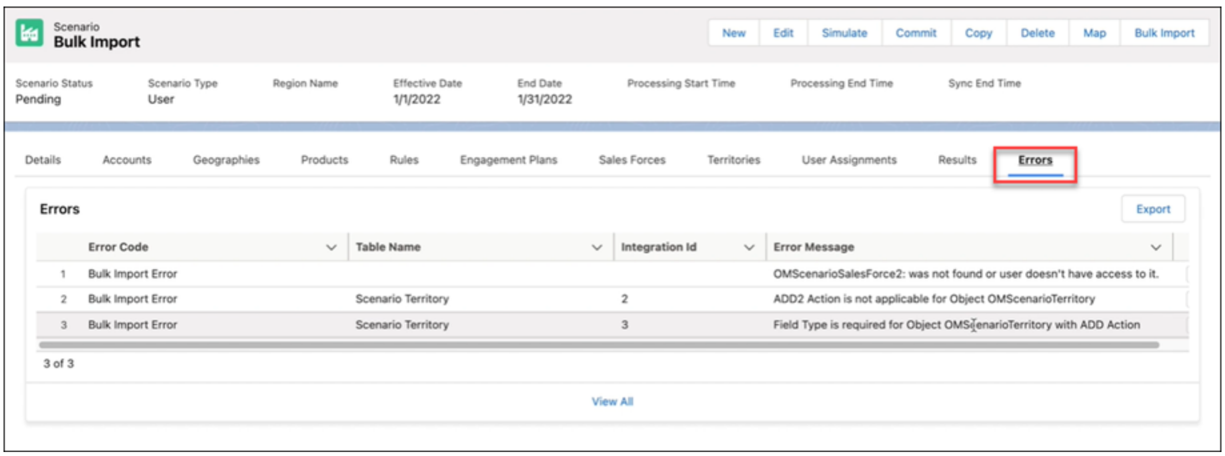
6. Click **Notifications** to view the status of the import. Notifications similar to the following may appear depending on your specific import scenario.



7. Click the message to open the scenario.

   If the import is successful, the new information is included within the scenario and you can simulate and commit the scenario.

   If there are errors related to the import, click the **Errors** tab and review the errors. Adjust the data within the .xlsx spreadsheet , save it, and repeat these steps starting from Step 3.



Modify Transactions and Rules and Update Effective and End Dates

You can modify sales force transactions, territory transactions, or rules that you created before you commit the scenario. After the scenario status is *Committed*, no changes can be made.

See:

- Modify Transactions or Rules in a Scenario
- Modify an Engagement Plan Transaction in a Scenario
- Update Effective Dates and End Dates of Transactions or Rules in a Scenario

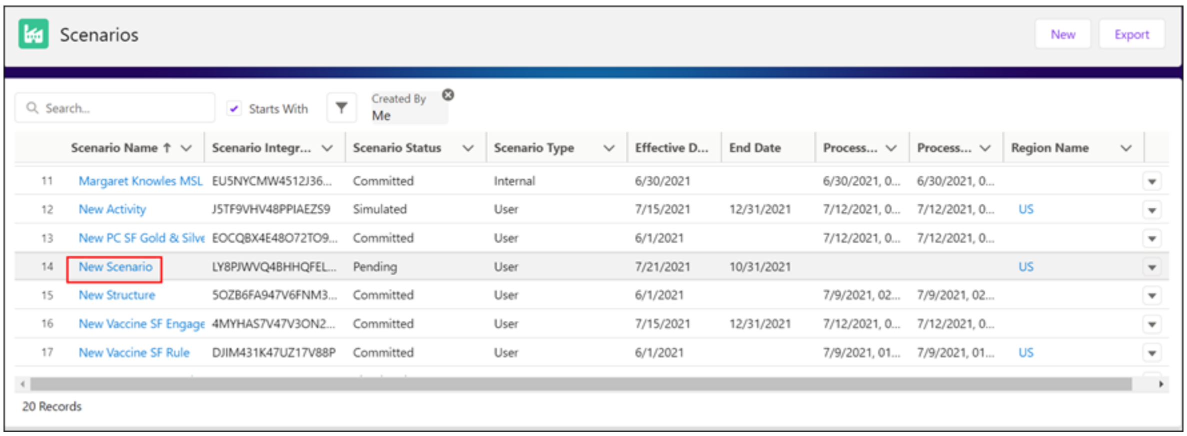
Modify Transactions or Rules in a Scenario

You can make updates to certain scenario transactions if the status of the scenario is *Pending* or *Simulated*. Transactions/Rules you can modify, or edit, include:

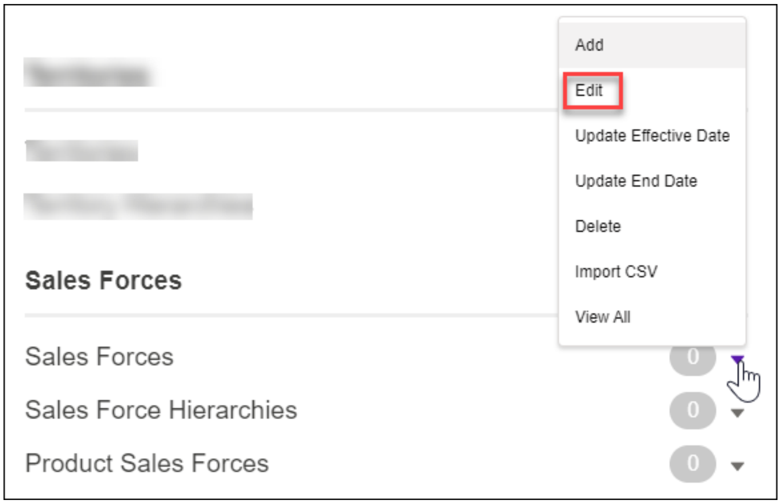
- Sales Force Transactions
- Territory Transactions
- User Assignment Transactions (edits limited to assignment type)
- Rules (edits limited to active rules for a past, current, or future effective date)

To edit a sales force transaction in a scenario

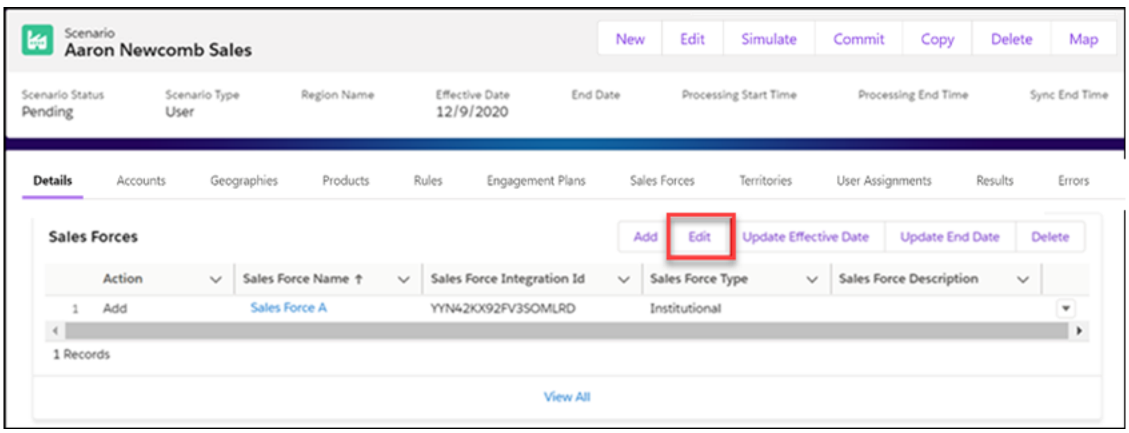
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to modify.



3. Do one of the following:
   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **Sales Forces**, and then select **Edit**.

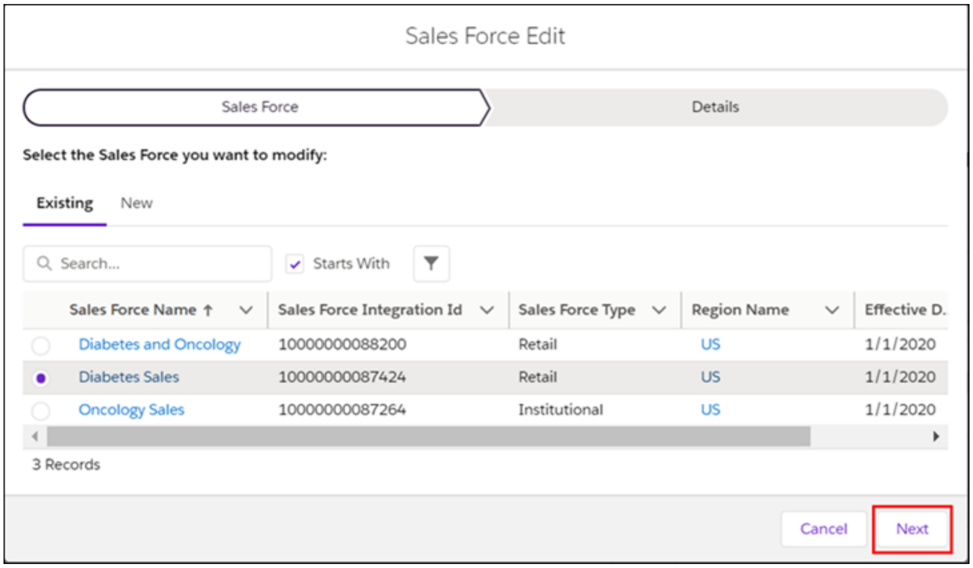


- Click the **Sales Forces** tab and select **Edit** for **Sales Forces**.

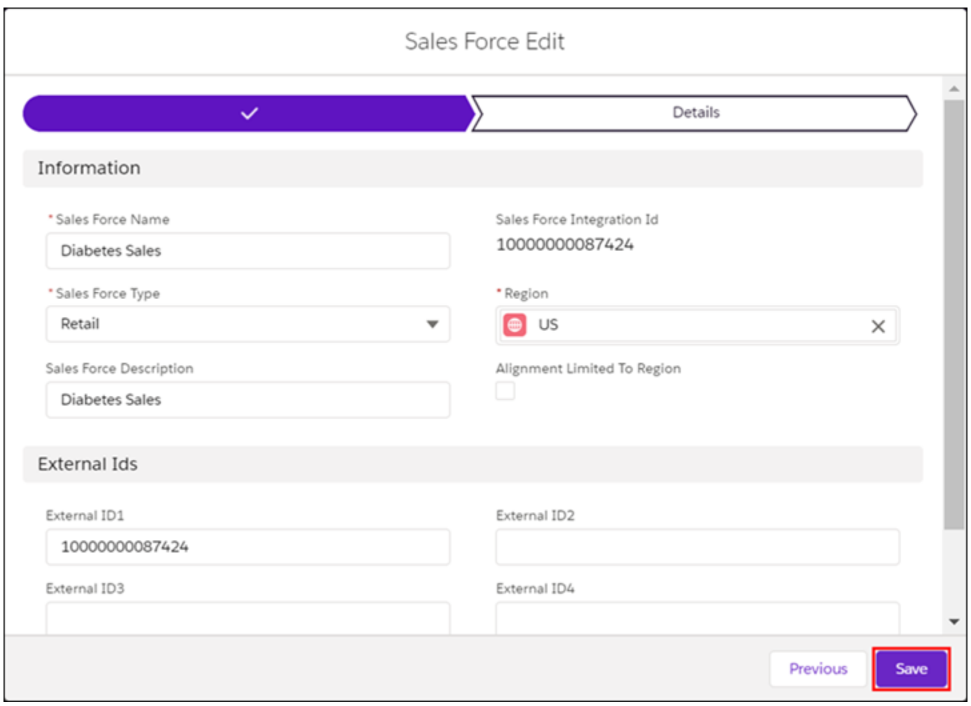


4. Select the check box next to the sales force you want to modify, then click **Next**.

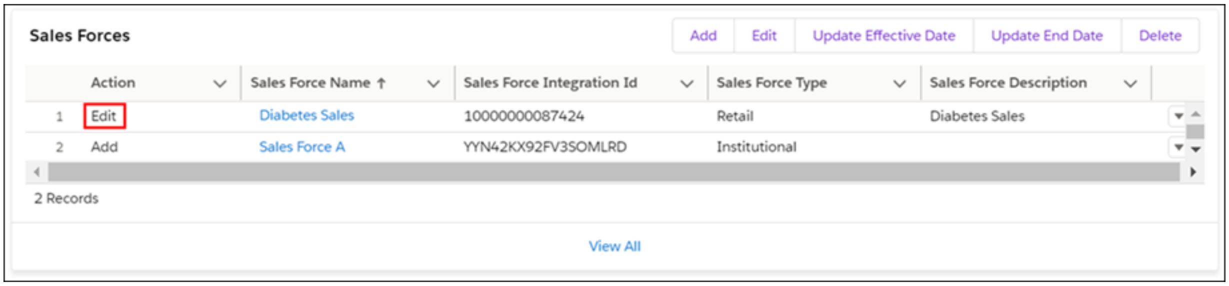
Note: The **Existing** tab contains all current sales forces in the database and the **New** tab contains sales forces that were just created in the current scenario.



5. Modify the applicable fields, then click **Save**.

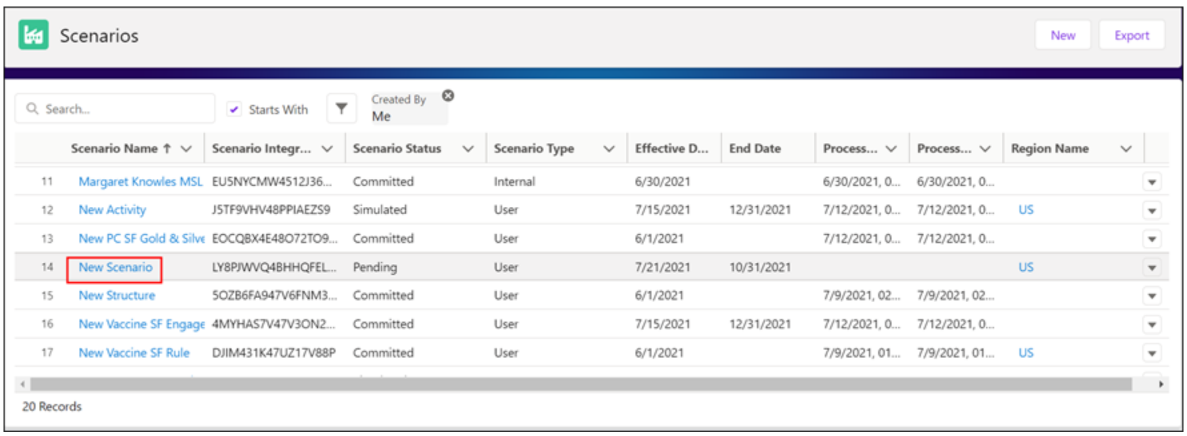


The **Action** status of the modified Sales Forces transaction is *Edit*.

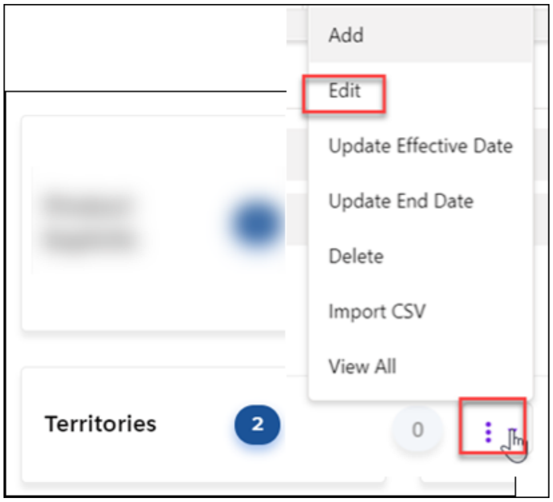


To modify a territory transaction in a scenario

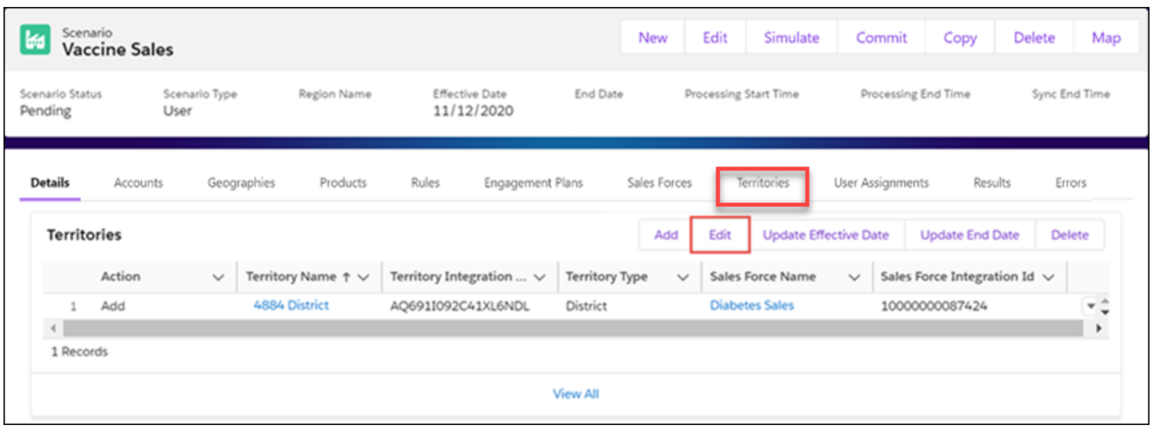
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to modify.



3. Do one of the following:
   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **Territories**, and then select **Edit**.

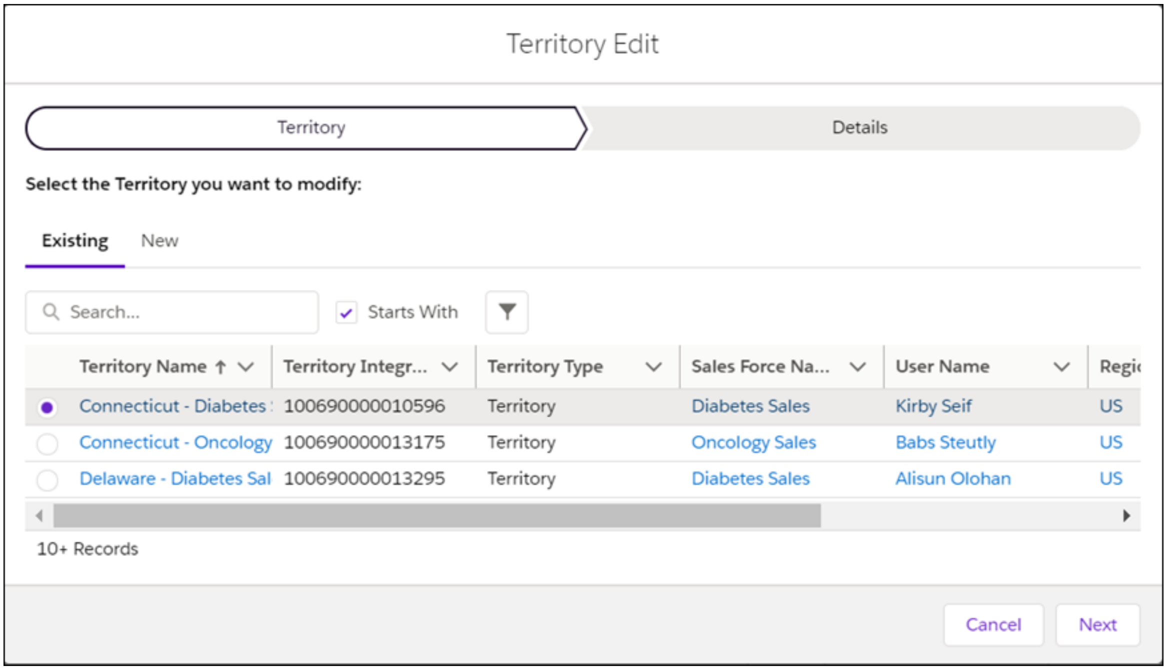


- Click the **Territories** tab and select **Edit** for Territories.

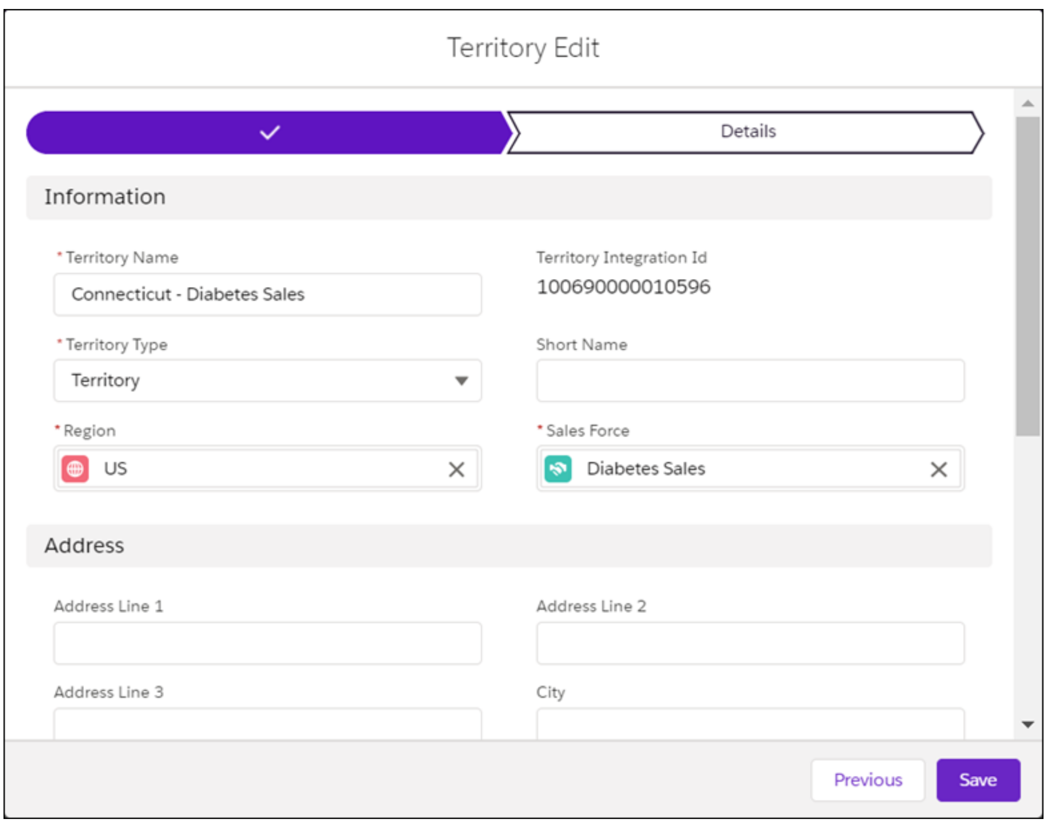


4. Select the check box next to the territory you want to modify, then click **Next**.

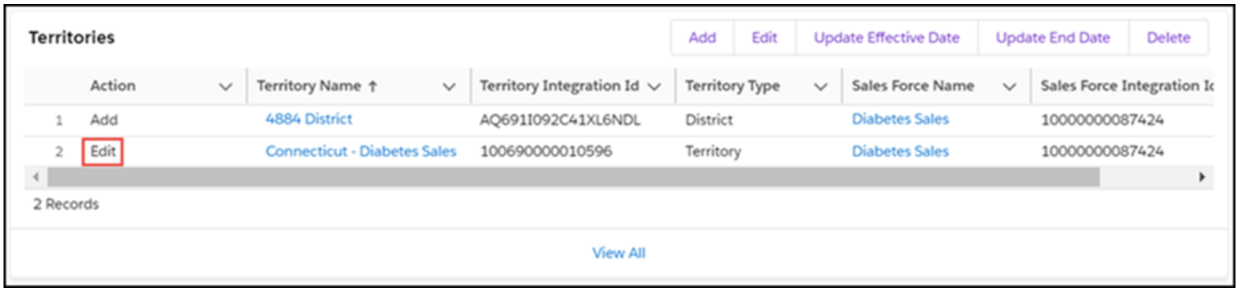
> **Note:** The **Existing** tab contains all current territories in the database and the **New** tab contains territories that were just created in the current scenario.



5. Modify the applicable fields, and then click **Save**.

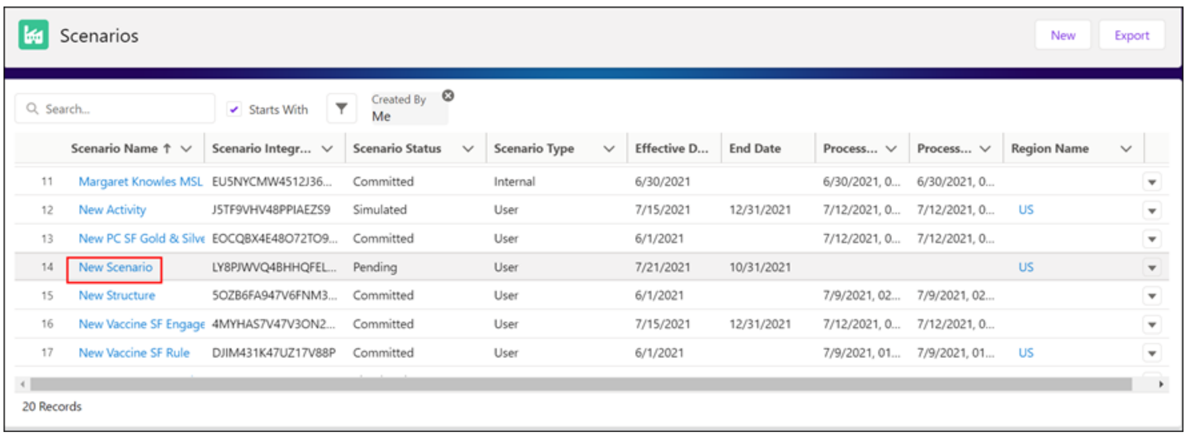


The **Action** status of the modified Territories transaction is *Edit*.

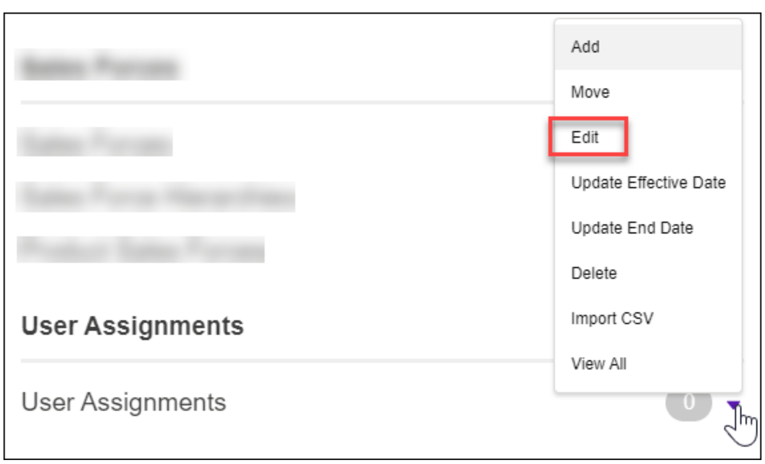


To modify a user assignment transaction in a scenario

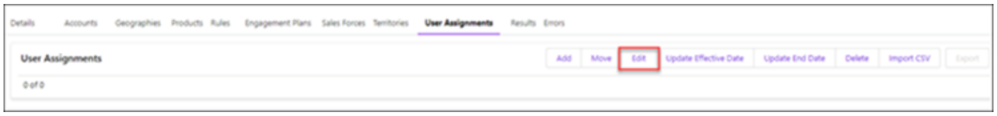
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to modify.



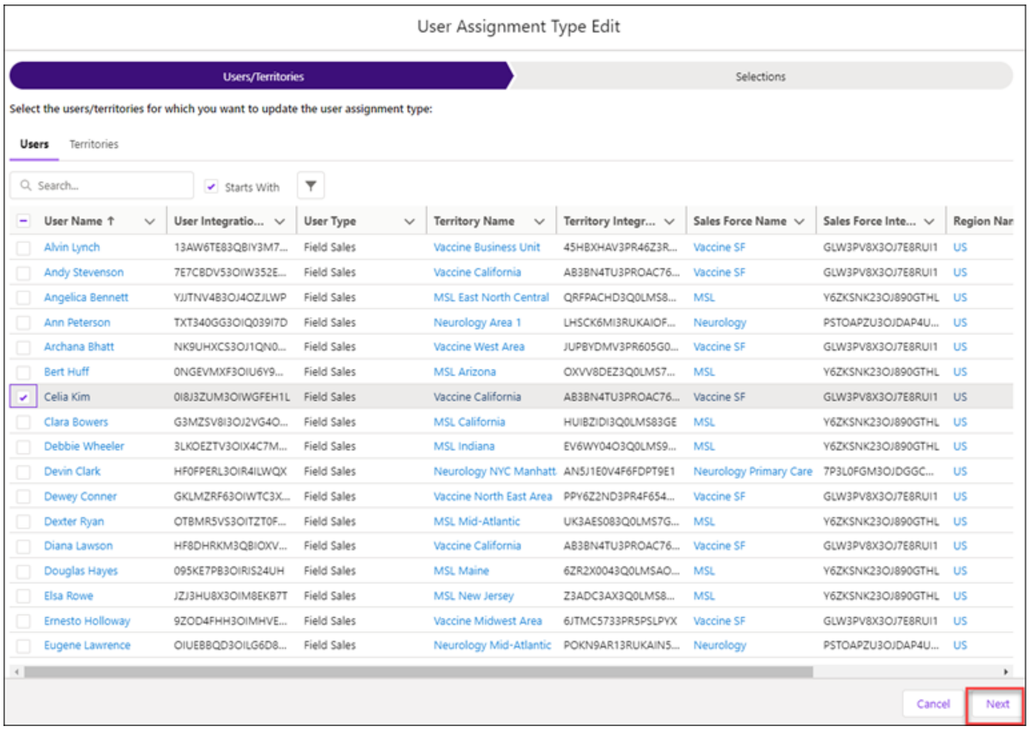
3. Do one of the following:
   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **User Assignments**, then select **Edit**.



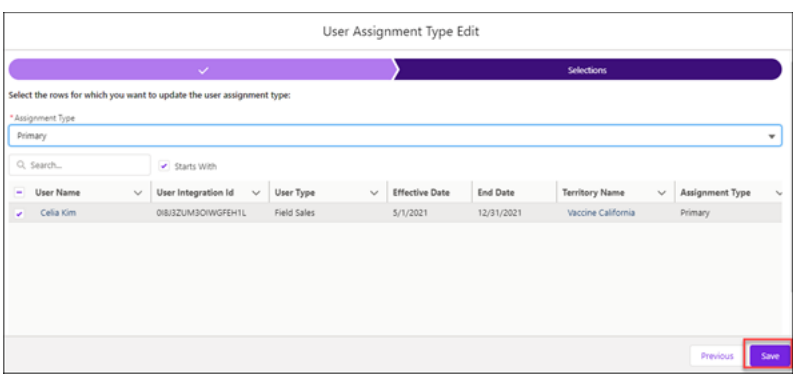
- Click the **User Assignments** tab and select **Edit** for User Assignments.



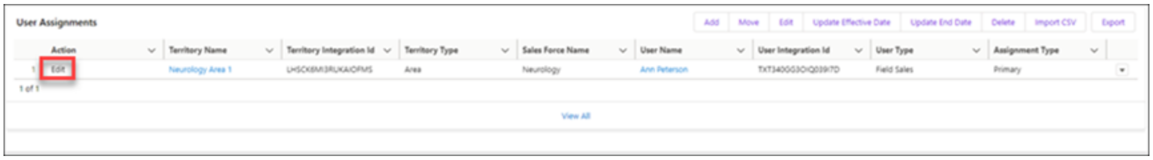
4. Select the check box next to the user you want to modify, then click **Next**.



5. Select the check box next to the user you want to modify, select the **Assignment Type** to assign to the user, and click **Save**.

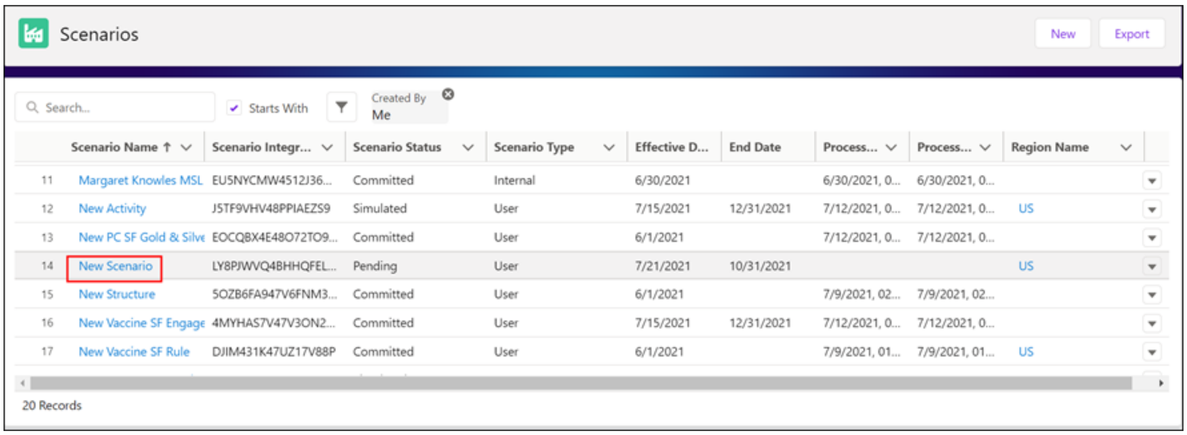


The **Action** status of the modified User Assignment transaction is *Edit*.

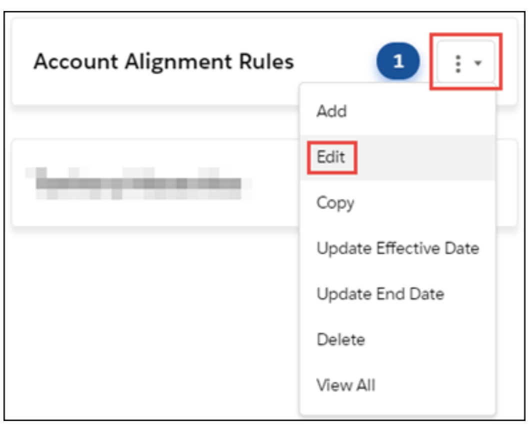


To modify a rule in a scenario

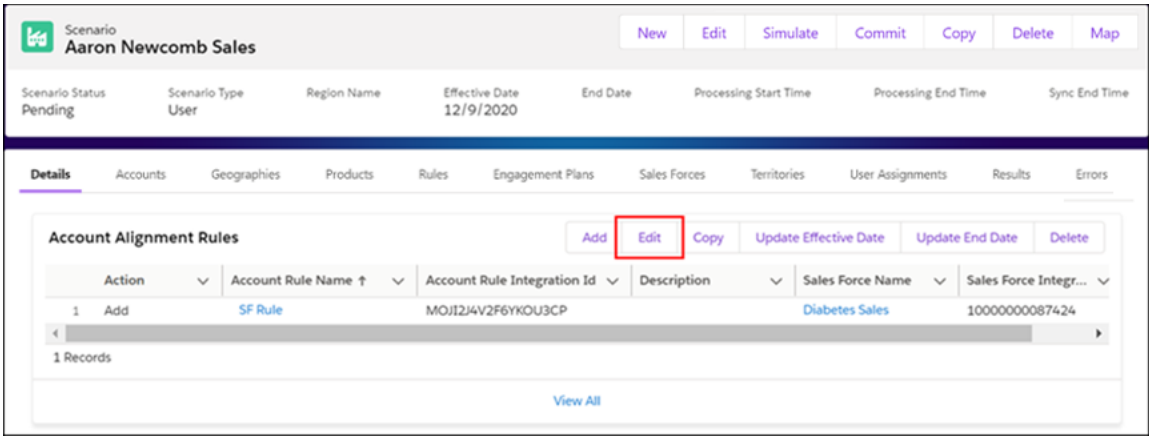
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to modify.



3. Do one of the following:
   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **Account Alignment Rules**, and then select **Edit**.

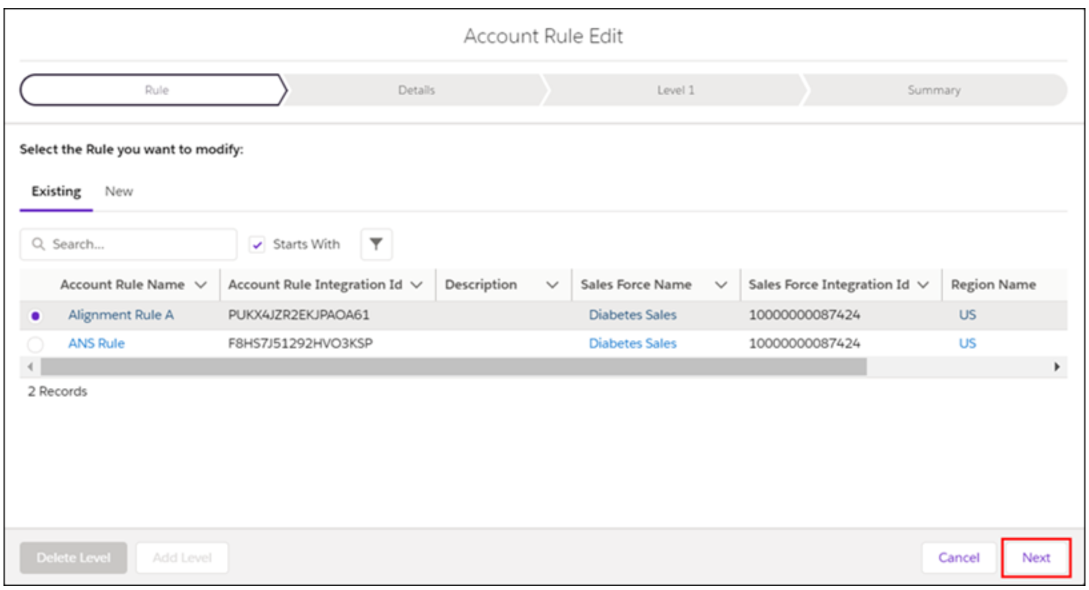


- Click the **Rule** tab and select **Edit** for Account Alignment Rules.

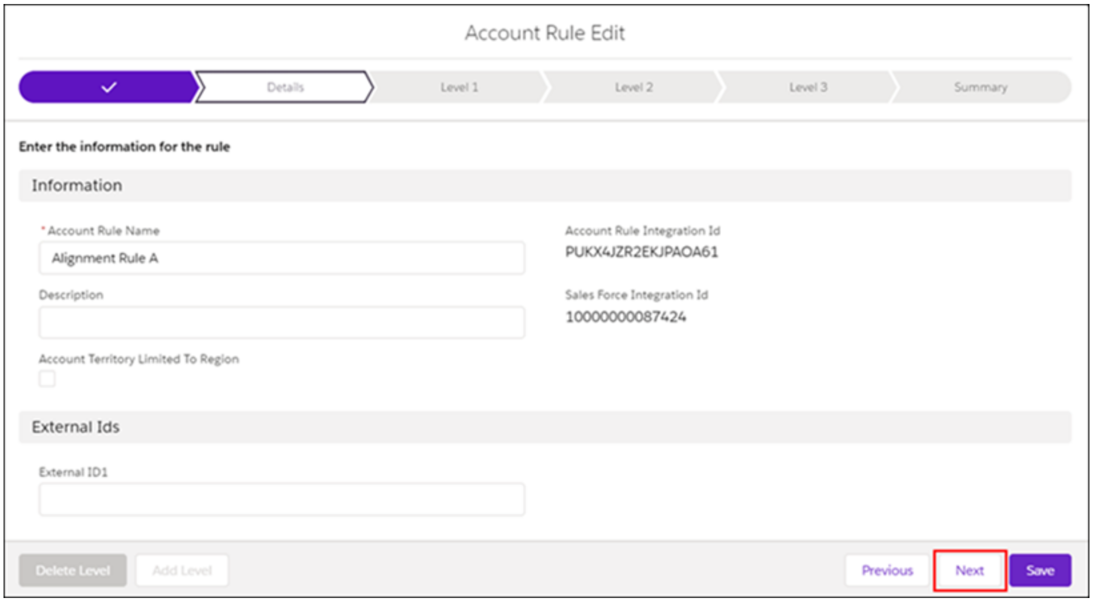


4. Select the check box next to the rule you want to modify, and then click **Next**.

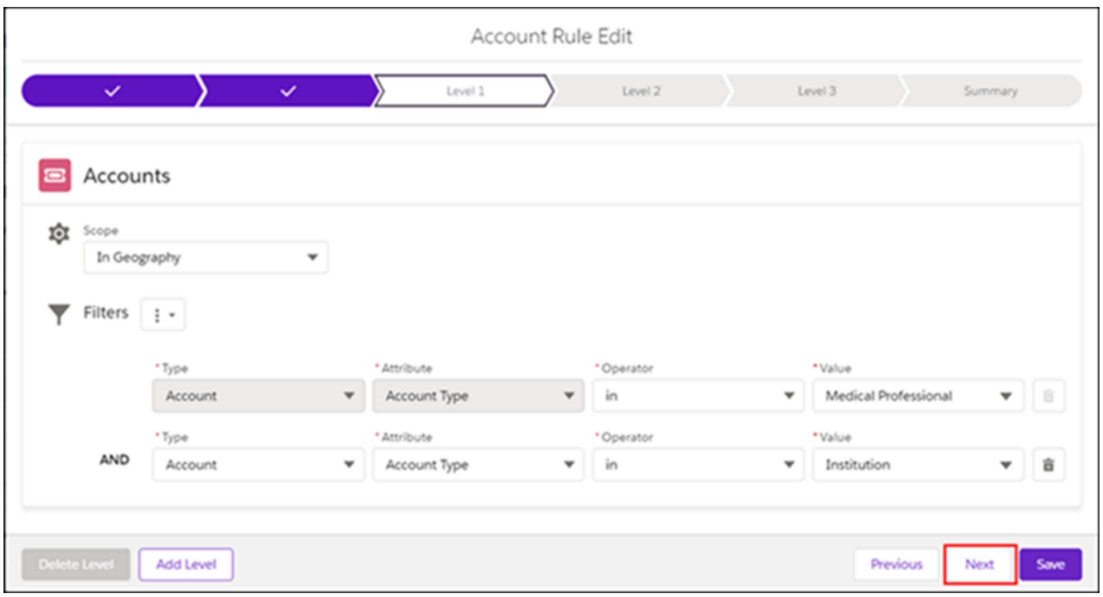
> **Note:** The **Existing** tab contains all current territories in the database and the **New** tab contains territories that were just created in the current scenario.



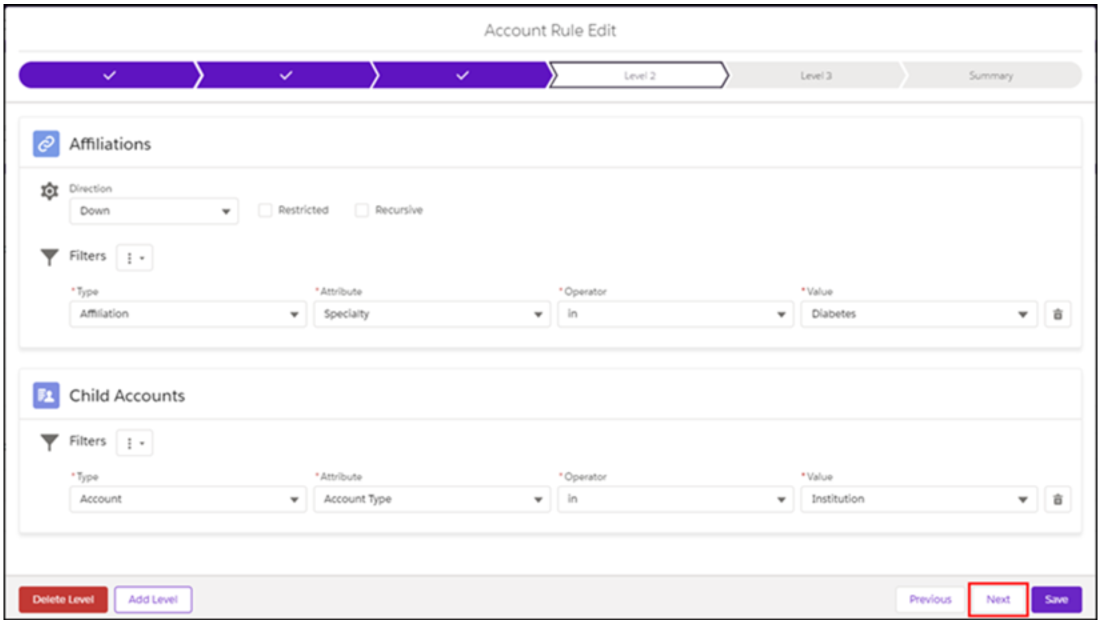
5. Modify the applicable fields, and then click **Next**.

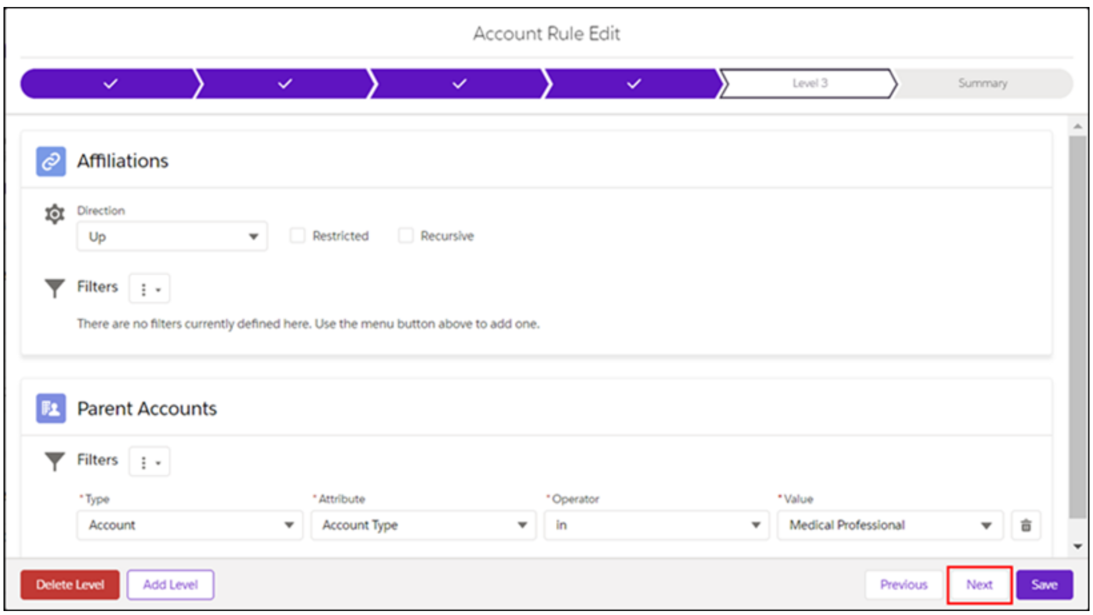


6. Modify the details of the rule, including the groups and conditions, if applicable, then click **Next**.

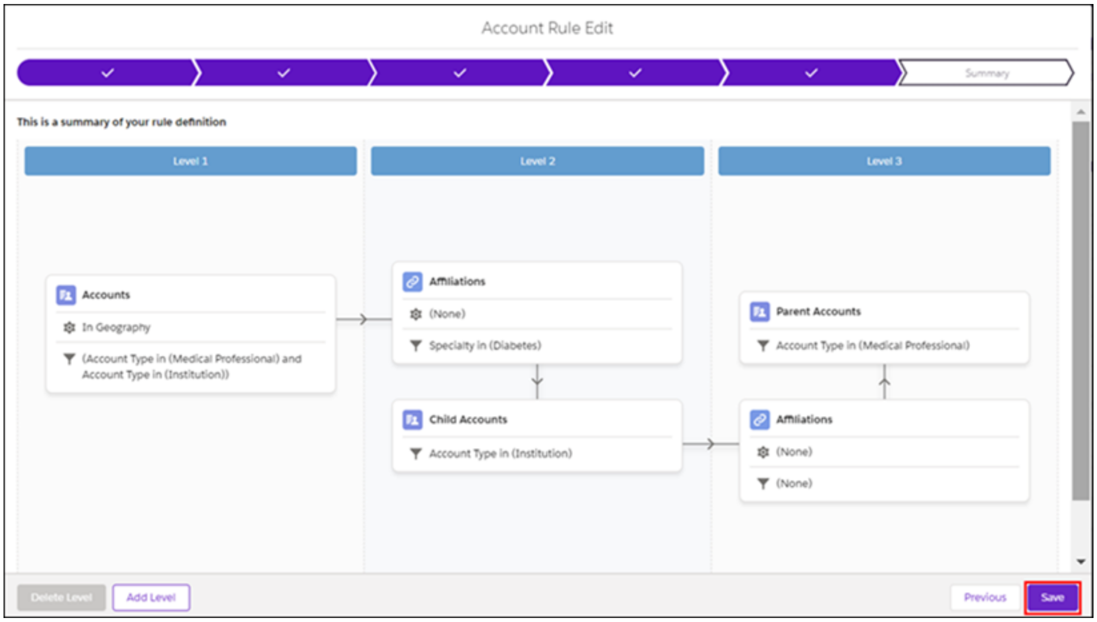


7. If you added levels to the rule, make modifications and then click **Next**.

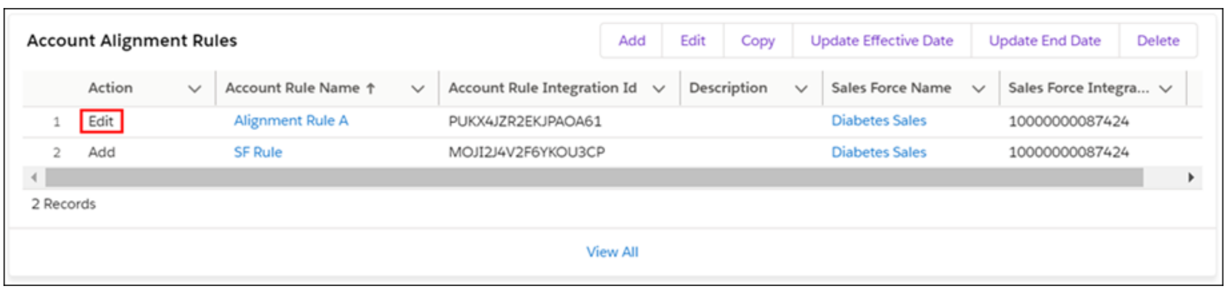




8. After you get to the summary page, review the visual representation of the modifications made, then click **Save**.



The **Action** status of the modified rule is *Edit*.

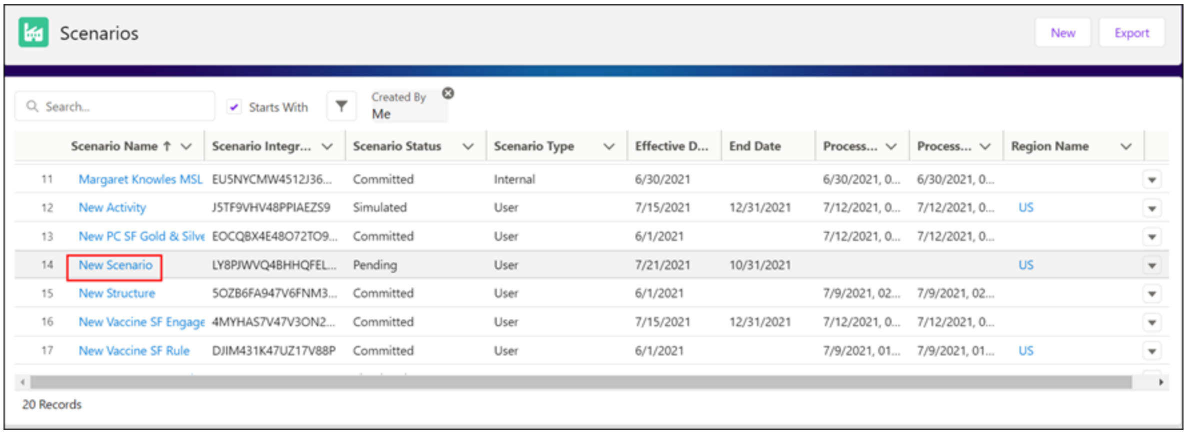


Modify an Engagement Plan Transaction in a Scenario

You can make updates to an engagement plan transaction if the status of the scenario is *Pending* or *Simulated*.

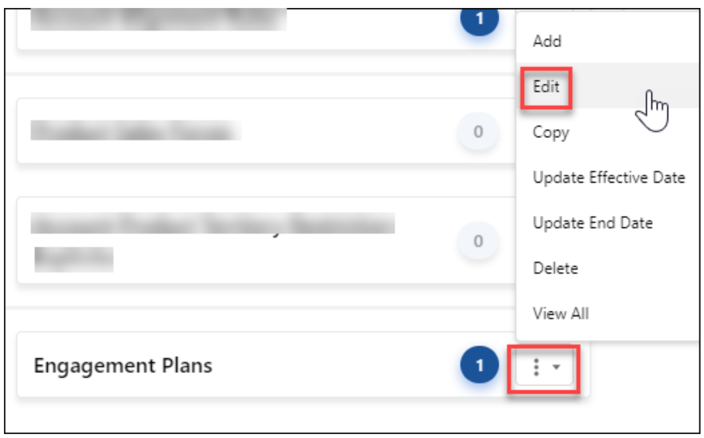
To edit an engagement plan transaction in a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to modify.

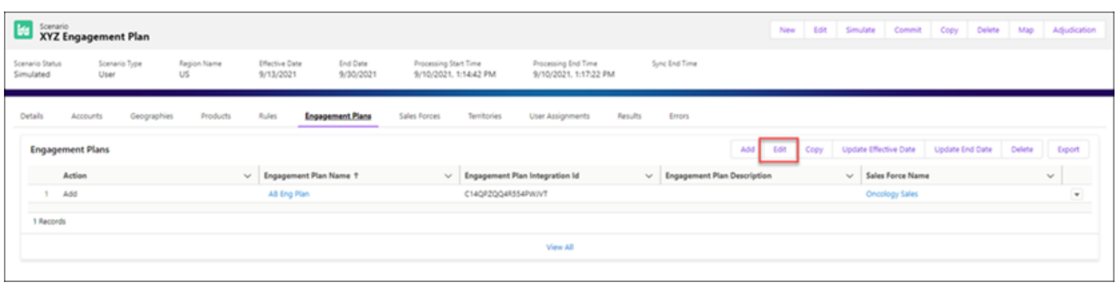


3. Do one of the following:

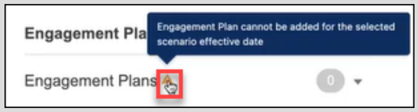
- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for Engagement Plans, then select **Edit**.

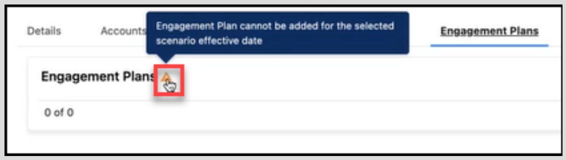


- Select the **Engagement Plans** tab, then click **Edit**.



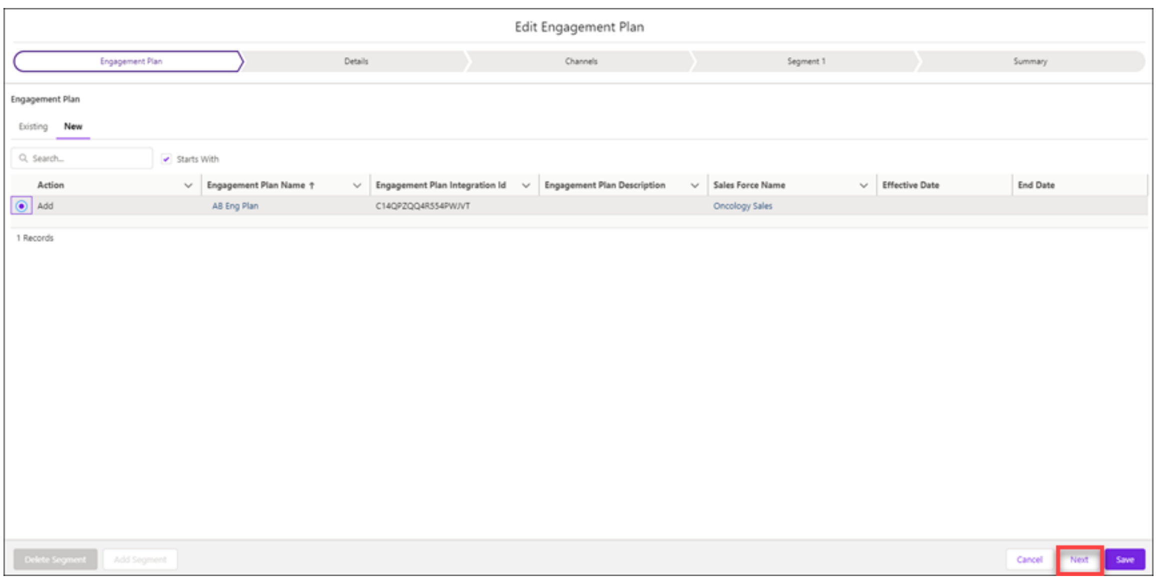
Note: If an engagement plan cannot be added to the scenario, an icon displays on the **Scenario Details** and **Engagement Plans** tabs. Click the icon for more information about why the plan can't be added.





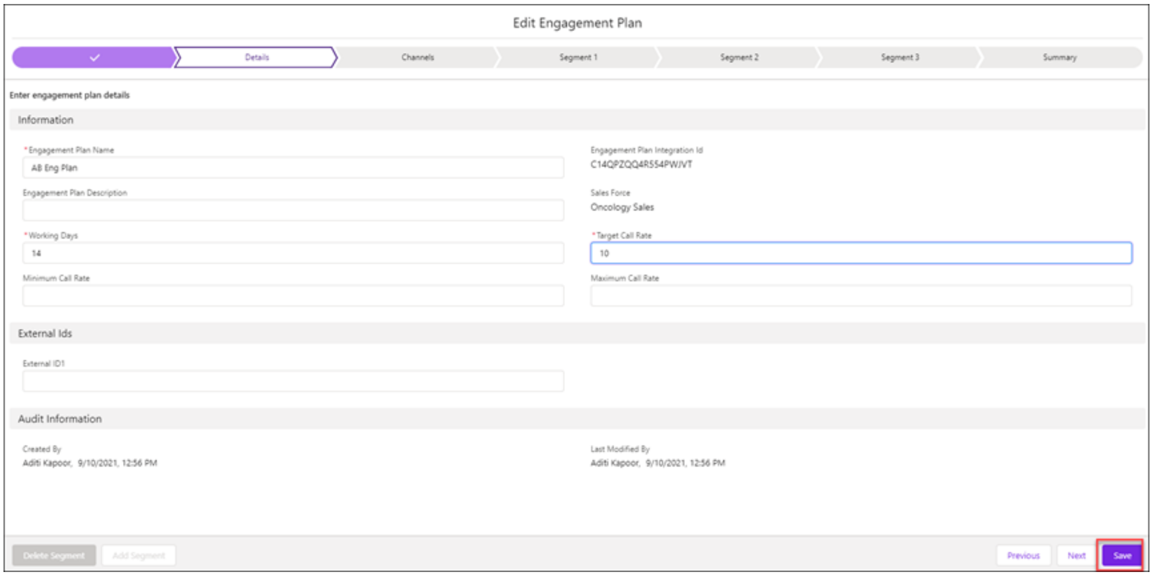
4. Select the check box next to the engagement plan you want to modify, then click **Next**.

Note: The **Existing** tab contains all current engagement plans in the database and the **New** tab contains plans that were just created in the current scenario.



5. Use the **Next** and **Previous** buttons to navigate the screens, modify the applicable fields, then

click **Save**.



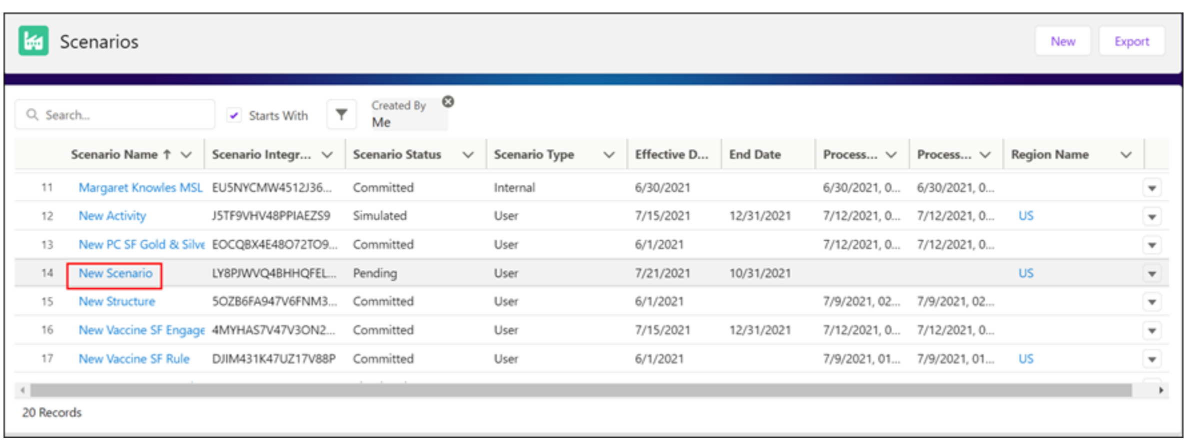
Update Effective Dates and End Dates of Transactions or Rules in a Scenario

You can update the effective date and end date of transactions if the status of the scenario is active/pending or simulated.

You can update the effective date of an account alignment rule or end date the rule for a past, current, or future end date.

To update the effective date of a transaction or rule in a scenario

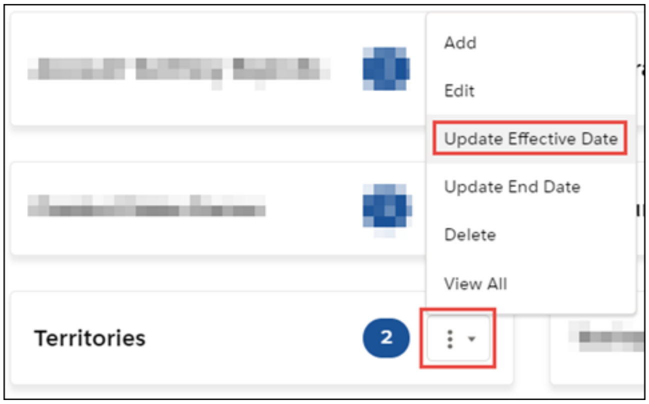
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction or rule whose effective date you want to update.



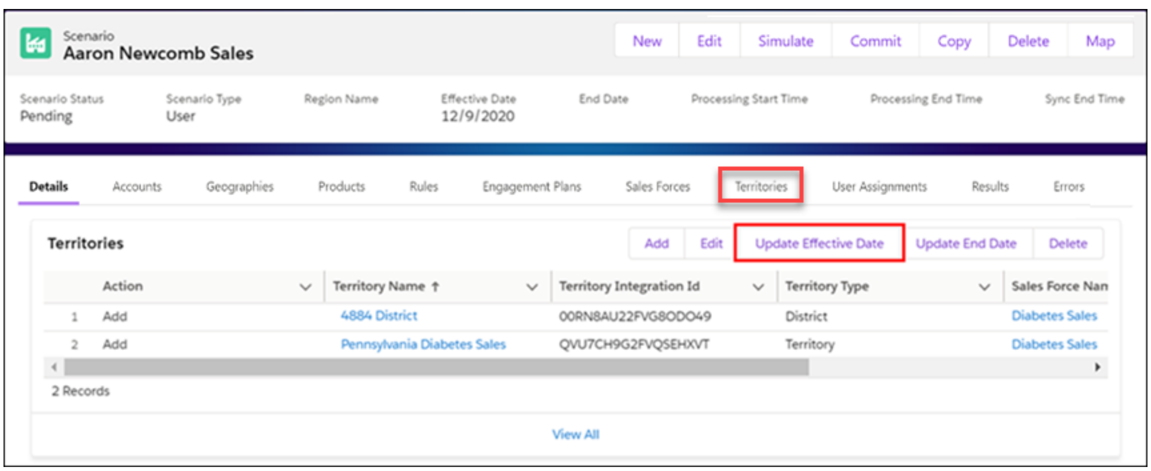
3. Do one of the following:

> **Important:** Make sure the Scenario Effective Date is set to the desired effective date for the transaction.

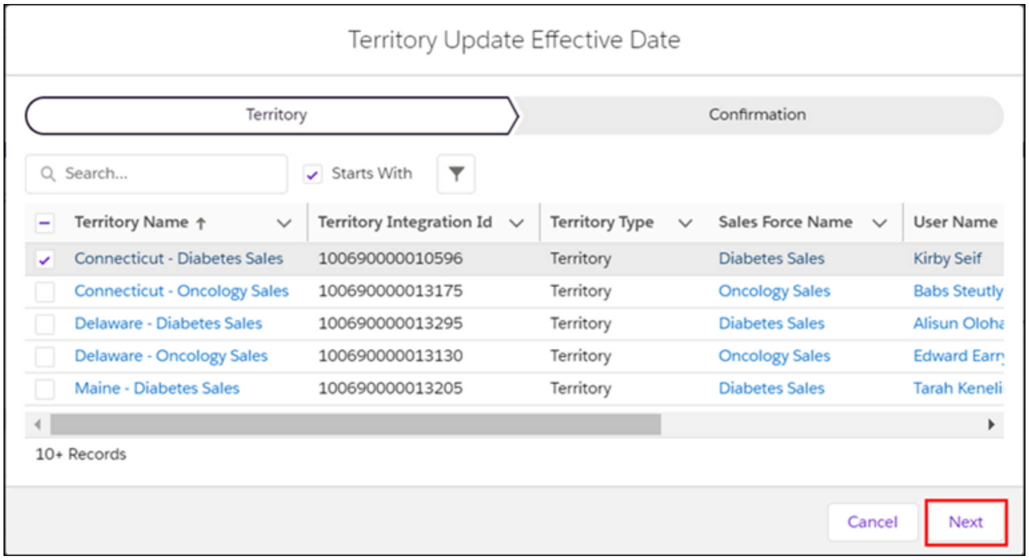
- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction or rule whose effective date you want to update, then select **Update Effective Date**.



- Click the tab where the transaction whose effective date you want to update is located or click the **Rules** tab if you are updating a rule's effective date, then select **Update Effective Date** for the transaction or rule.



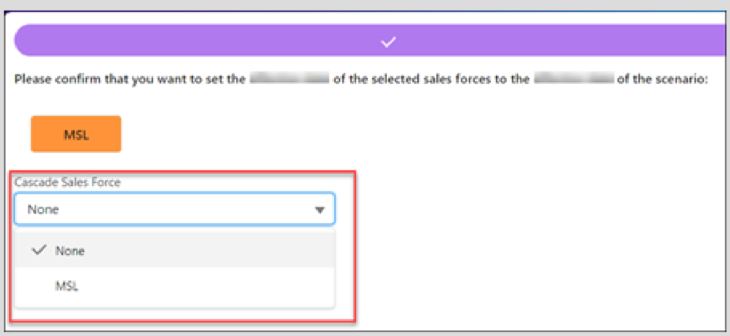
4. Select the territory or territories (or sales force(s), user(s), rules, etc.) whose effective date(s) you want to update, then click **Next**.

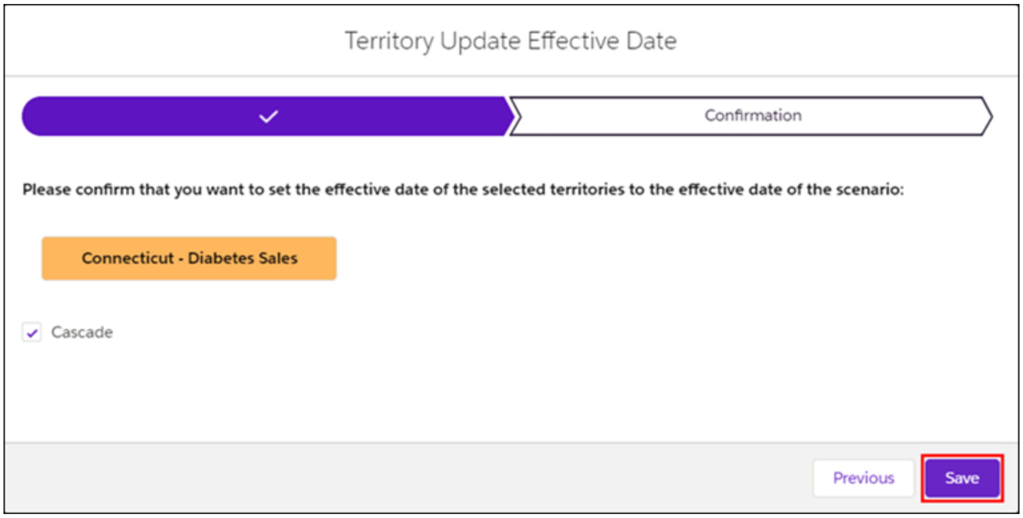


5. Click **Save** to confirm the selections.

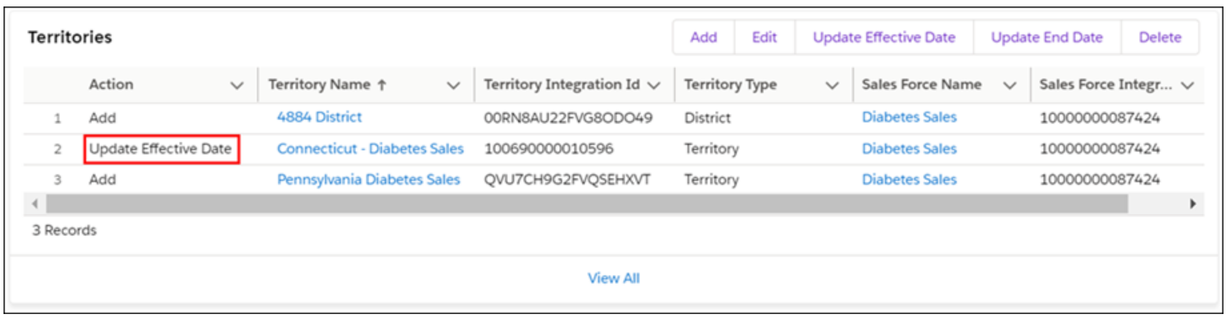
Note: For Territory transactions, select **Cascade** if you want to update the effective date for all underlying child territories.

For Sales Force transactions, select a sales force from the **Cascade Sales Force** drop-down list if you want to update the effective date for all underlying child records.



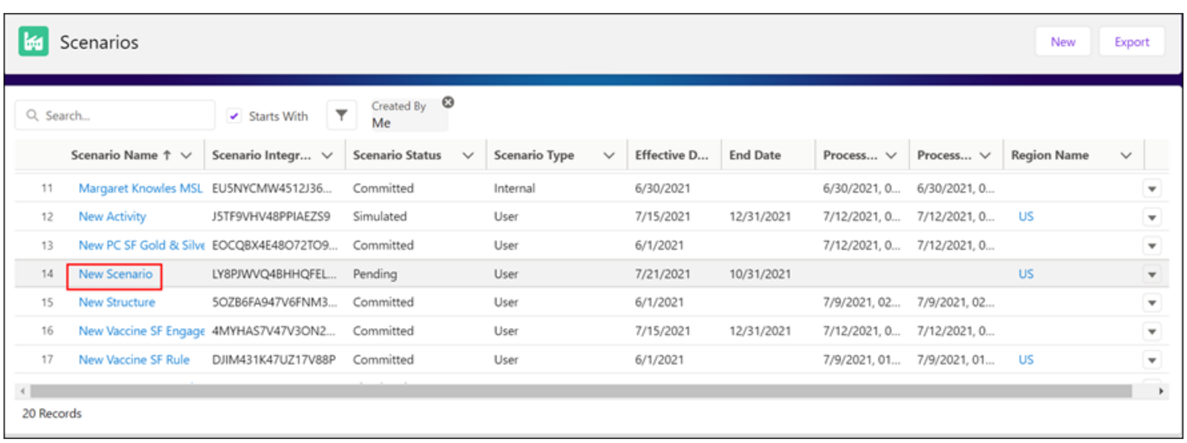


The **Action** status of the updated transaction is *Update Effective Date*.



To update the end date of a transaction or rule in a scenario

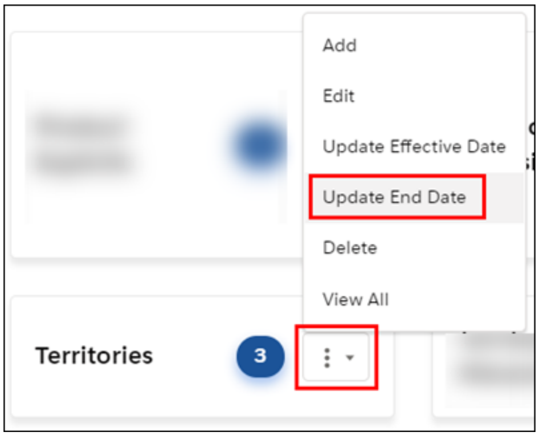
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction or rule whose end date you want to update.



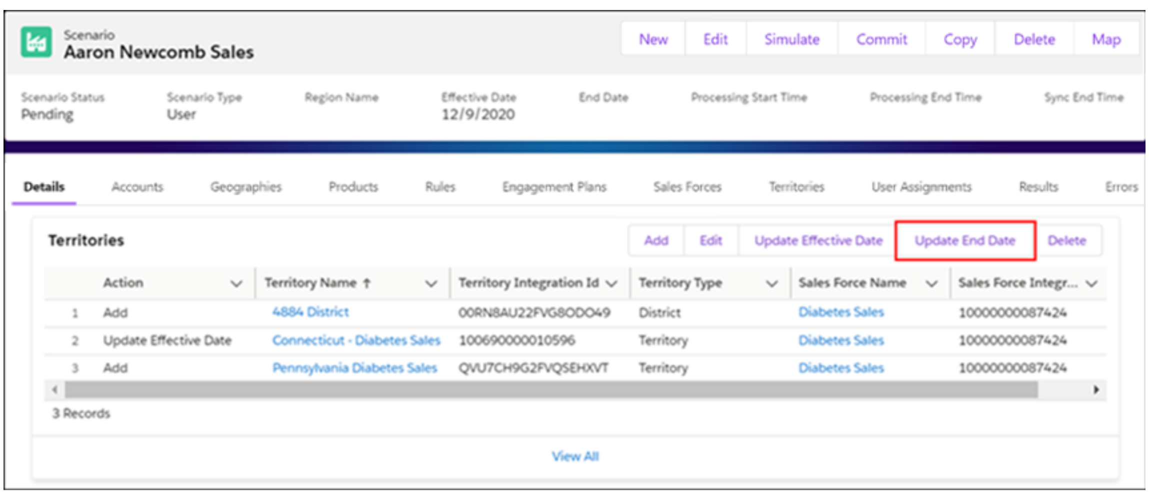
3. Do one of the following:

> **Important:** Make sure the scenario end date is set to the desired end-date for the transaction.

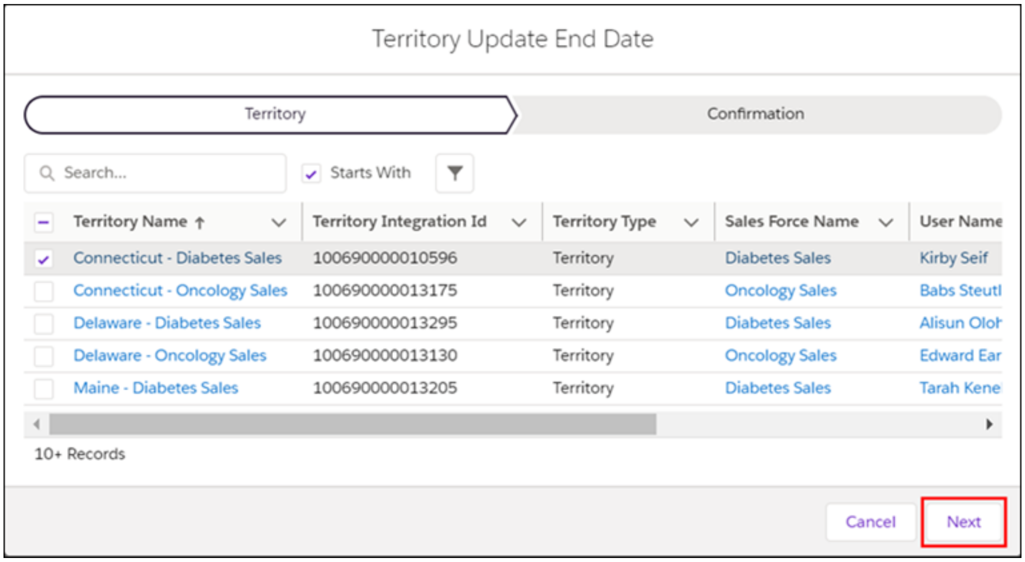
- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction or rule whose end date you want to update, then select **Update End Date**.



- Click the tab where the transaction whose end date you want to update is located or click the **Rules** tab if you are updating a rule's end date, then select **Update End Date** for the transaction or rule.



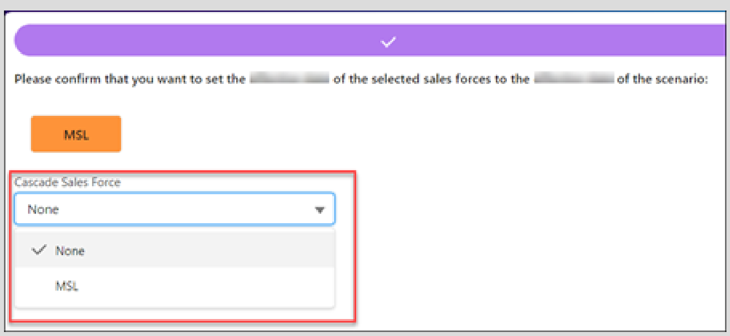
4. Select the territory or territories (or sales force(s), user(s), rules, etc.) whose end date(s) you want to update, then click **Next**.

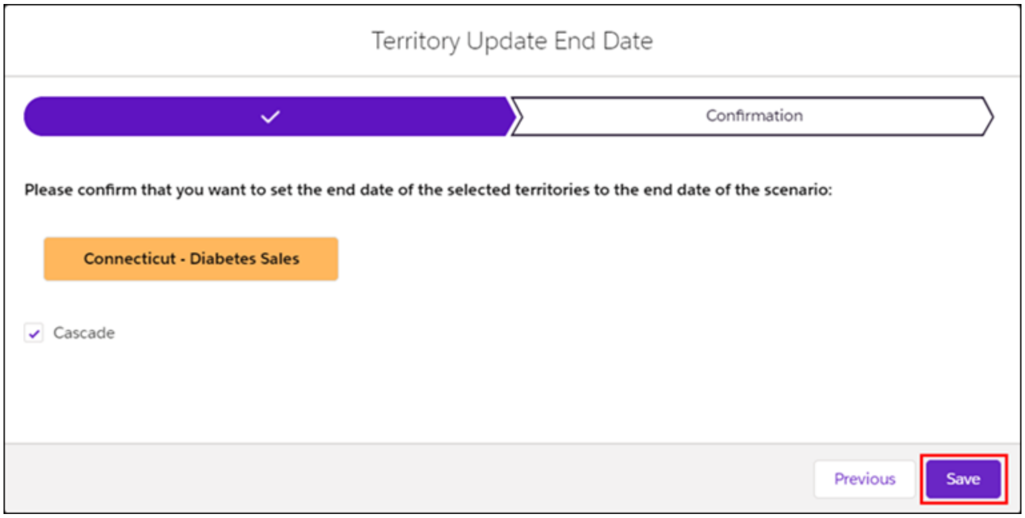


5. Click **Save** to confirm the selections.

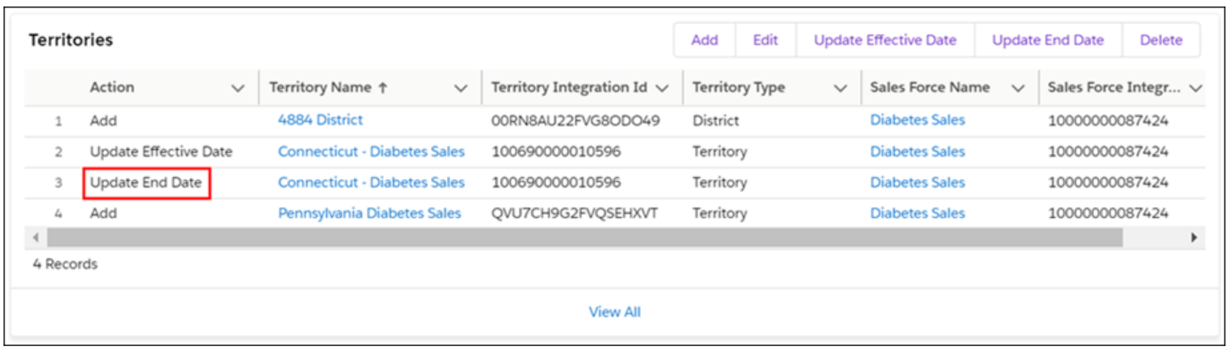
Note: For Territory transactions, select **Cascade** if you want to end date child territories and end date all related entities for the selected territories, such as account alignments, product alignments, geography alignments, or user alignments.

For Sales Force transactions, select a sales force from the **Cascade Sales Force** drop-down list to update the end-date for all underlying child records.





The **Action** status of the updated transaction is *Update End Date*.



Territories

Add | Edit | Update Effective Date | Update End Date | Delete

	Action	Territory Name	Territory Integration Id	Territory Type	Sales Force Name	Sales Force Integr...
1	Add	4884 District	00RN8AU22FVG8ODO49	District	Diabetes Sales	10000000087424
2	Update Effective Date	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	10000000087424
3	Update End Date	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	10000000087424
4	Add	Pennsylvania Diabetes Sales	QVU7CH9G2FVQSEHXVT	Territory	Diabetes Sales	10000000087424

4 Records

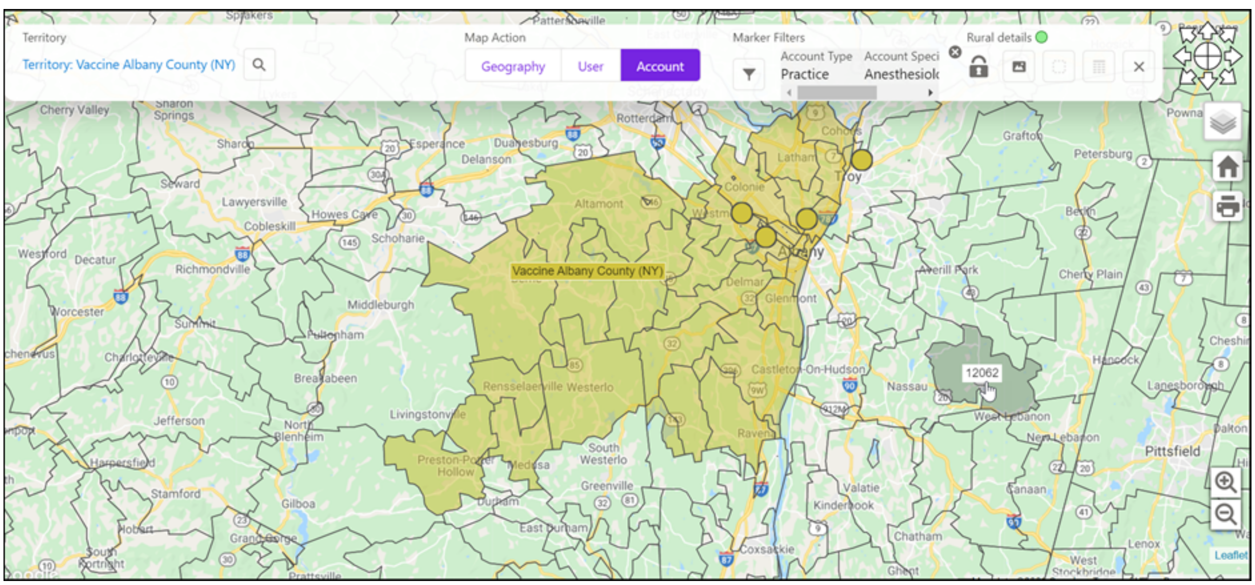
View All

Manage Transactions Using Maps

You can manage geography territory alignments, user assignments, and account territory explicits alignment transactions in a scenario using the **Maps** functionality.

Throughout Maps, individual accounts, such as medical professionals and business contacts, display on maps as circles. Organization accounts, which include all other types, display on maps as slightly larger circles. If multiple accounts are included in the same location or if an account has multiple addresses, you can hover over an account to view all accounts and then select and drag them separately.

When you access **Maps** from the **Scenarios**, **Territories**, or **Adjudication** modules, you can see geography boundaries in relation to account pins.



See:

- Access Maps from a Scenario
- Manage Geography Alignment Transactions Using Maps

- [Manage User Transactions Using Maps]()
- [Manage Account Transactions Using Maps]()

Access Maps from a Scenario

You can access **Maps** via a scenario you created.

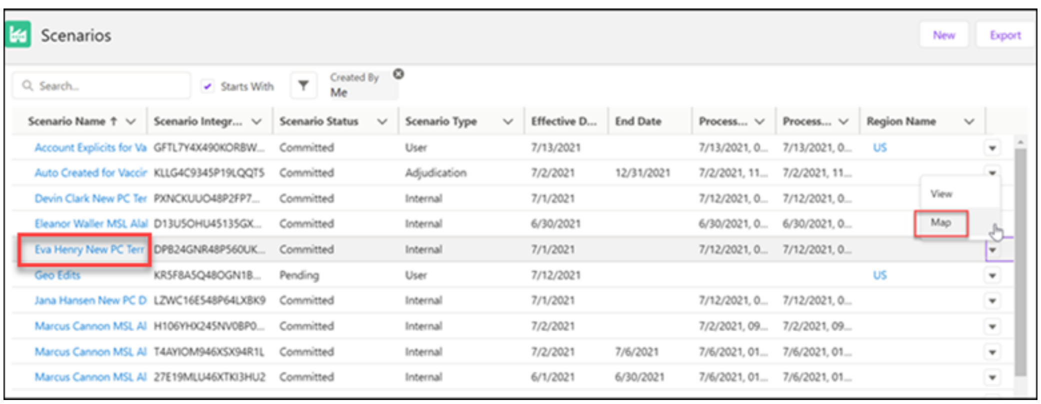
> **Note:** If you have already accessed Maps and are continuing with additional maps transactions within the same scenario, the map appears as it was the last time it was accessed.

To access Maps

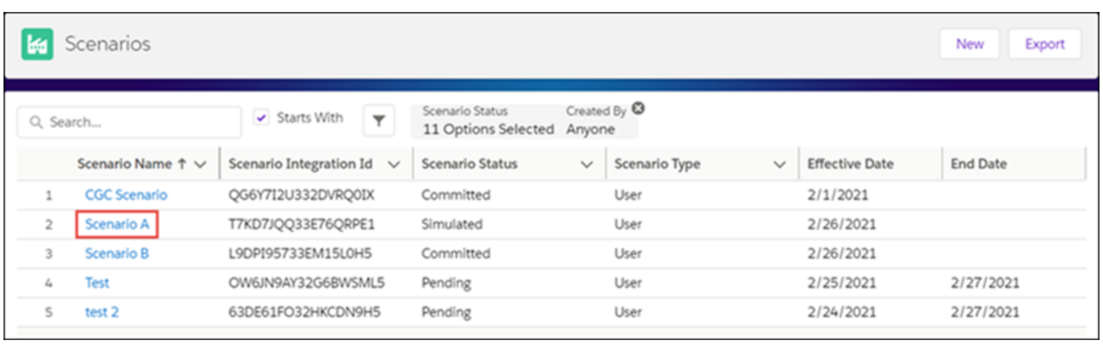
1. From the primary navigation bar, click **Scenarios**.

   You can access Maps in three different ways.

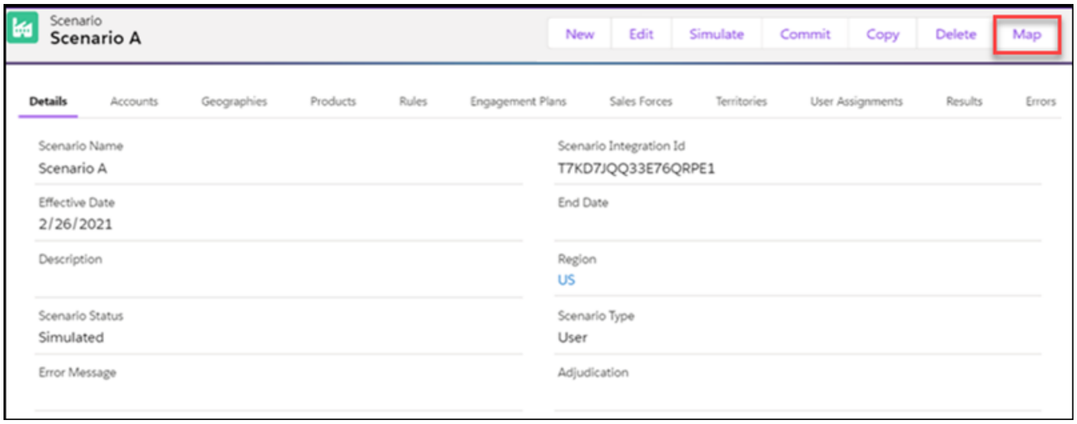
   - Select the drop down of the scenario that contains the map you want to view, then click **Map**.



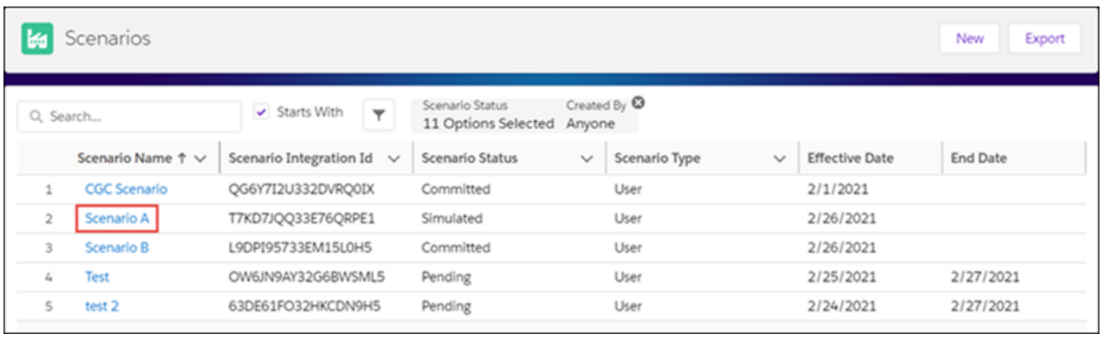
   - Select the scenario that contains the map you want to view,



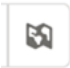
then click **Map**.

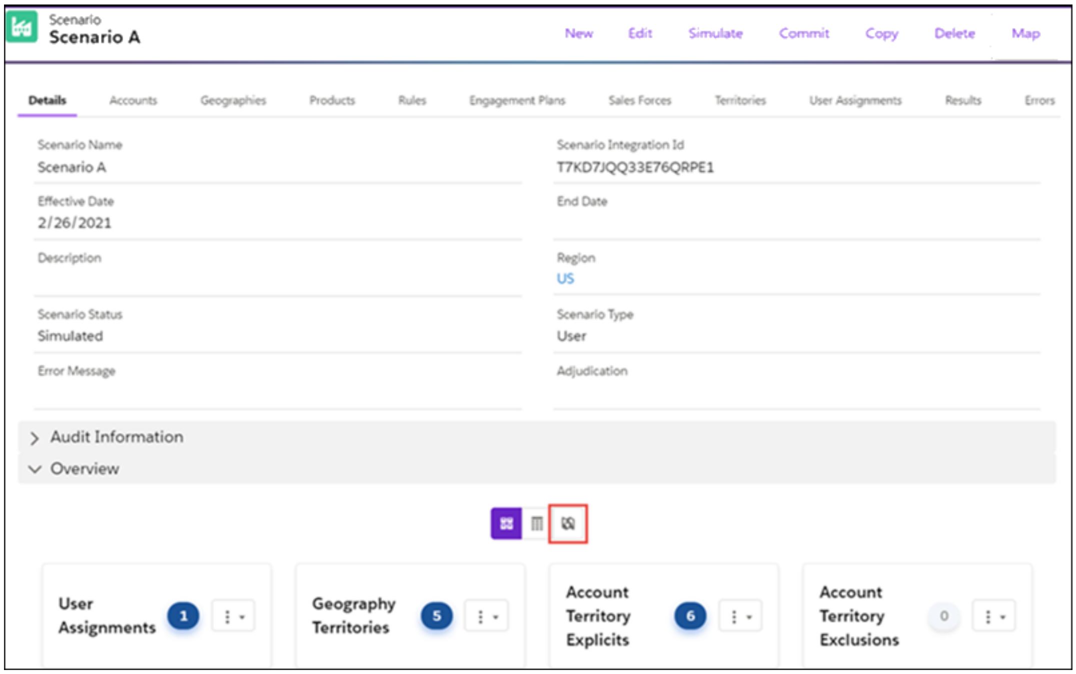


- Select the scenario that contains the map you want to view,



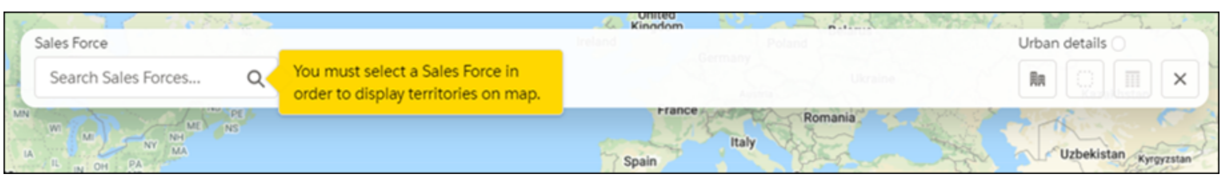
then, from the **Details** tab, scroll down to the **Overview** section and click the **Map** icon


.



2. Select a Sales Force.

Note: Only one Sales Force at a time can be viewed on Maps.

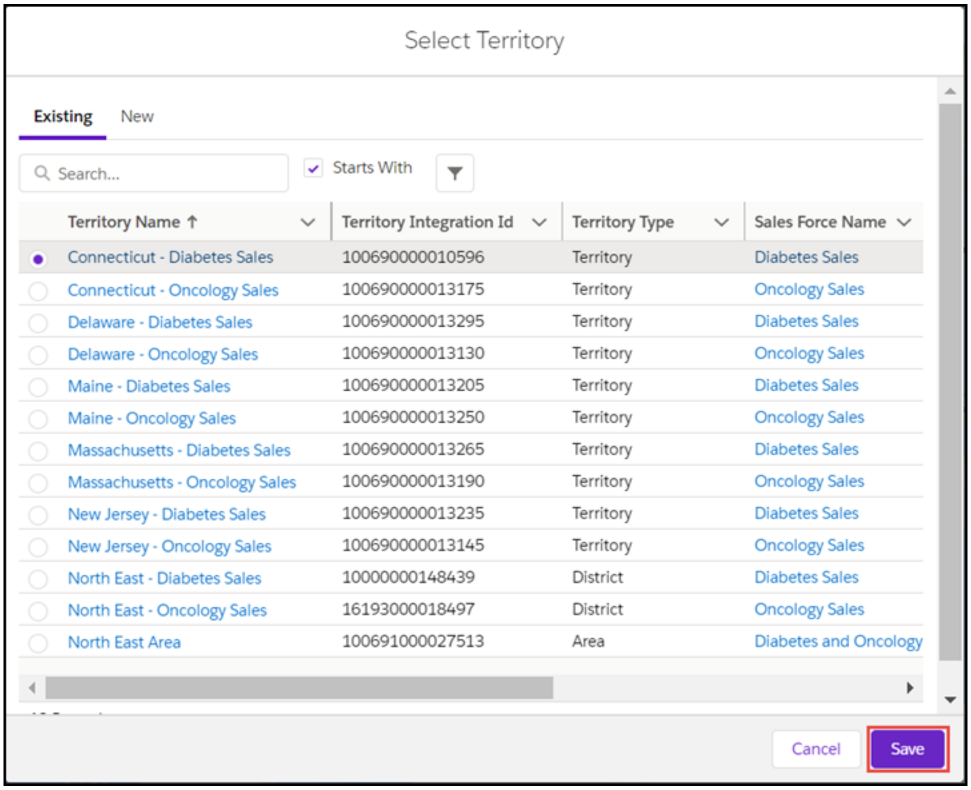


After you select a Sales Force, the highest-level territory appears in the **Territory** section.

3. To narrow the territory area, do one of the following:

   - Click **Search** and choose a different territory, and then click **Save**.

     > **Note:** You can only view a territory for which you have access.

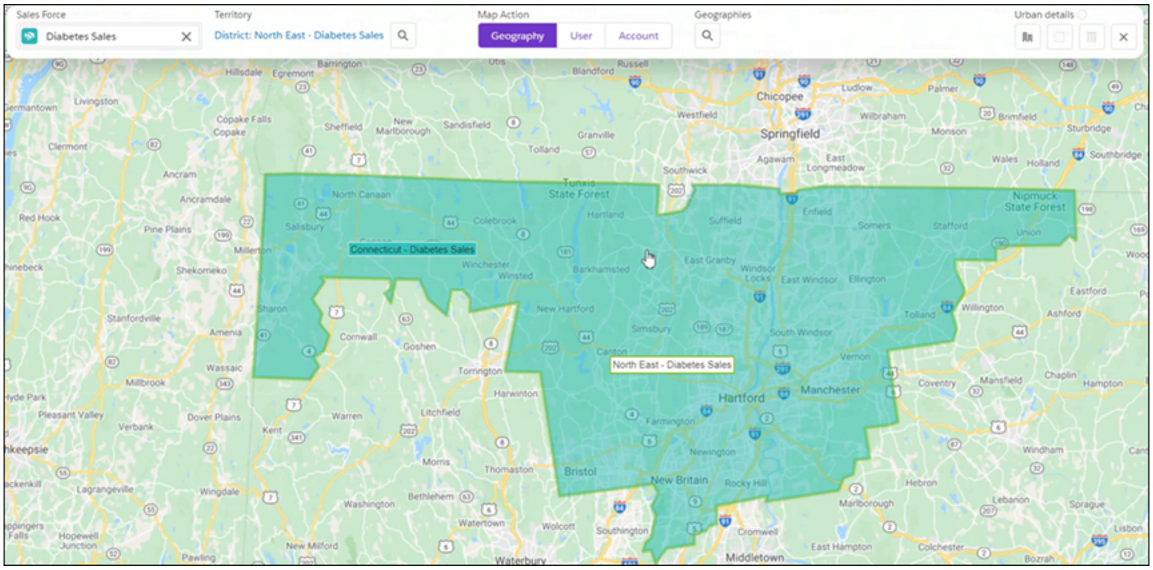


Territory Name	Territory Integration Id	Territory Type	Sales Force Name
Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales
Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales
Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales
Delaware - Oncology Sales	100690000013130	Territory	Oncology Sales
Maine - Diabetes Sales	100690000013205	Territory	Diabetes Sales
Maine - Oncology Sales	100690000013250	Territory	Oncology Sales
Massachusetts - Diabetes Sales	100690000013265	Territory	Diabetes Sales
Massachusetts - Oncology Sales	100690000013190	Territory	Oncology Sales
New Jersey - Diabetes Sales	100690000013235	Territory	Diabetes Sales
New Jersey - Oncology Sales	100690000013145	Territory	Oncology Sales
North East - Diabetes Sales	10000000148439	District	Diabetes Sales
North East - Oncology Sales	16193000018497	District	Oncology Sales
North East Area	100691000027513	Area	Diabetes and Oncology

   - Click and drag the map to pan to the area you would like to view.

> **Note:** If you switch to a different territory via **Search** and the territory belongs to a different sales force, the map will switch to that sales force and territory hierarchy.

The selected territory appears on the map.



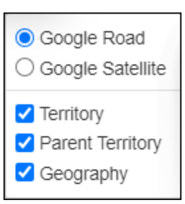
Manage Geography Alignment Transactions Using Maps

You can align geographies to a territory, move the geography to a different territory, and update the geography territory alignment effective and end dates using **Maps**.

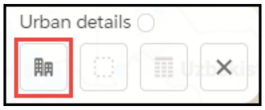
To align geographies to a territory using Maps

1. Select the territory you would like to work with. See Access Maps from a Scenario for details on selecting territories.
2. Click **Geography** from the **Map Action** section.

3. Click **Options** on the upper right-hand side of the map and select **Geography**.

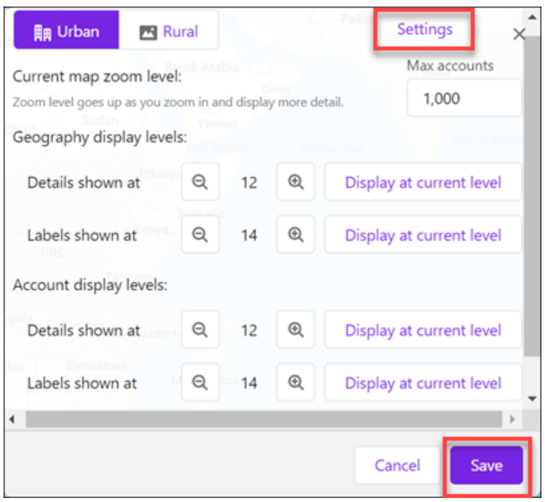


4. Click **Settings** to select the mode in which you would like the geography boundaries displayed.



- Click **Urban** Urban to view the territory at a detailed level, for example, if you are looking at a highly populated city.
- Click **Rural** Rural to view the territory at a higher level, for example, in areas where the geography boundaries are spread out.

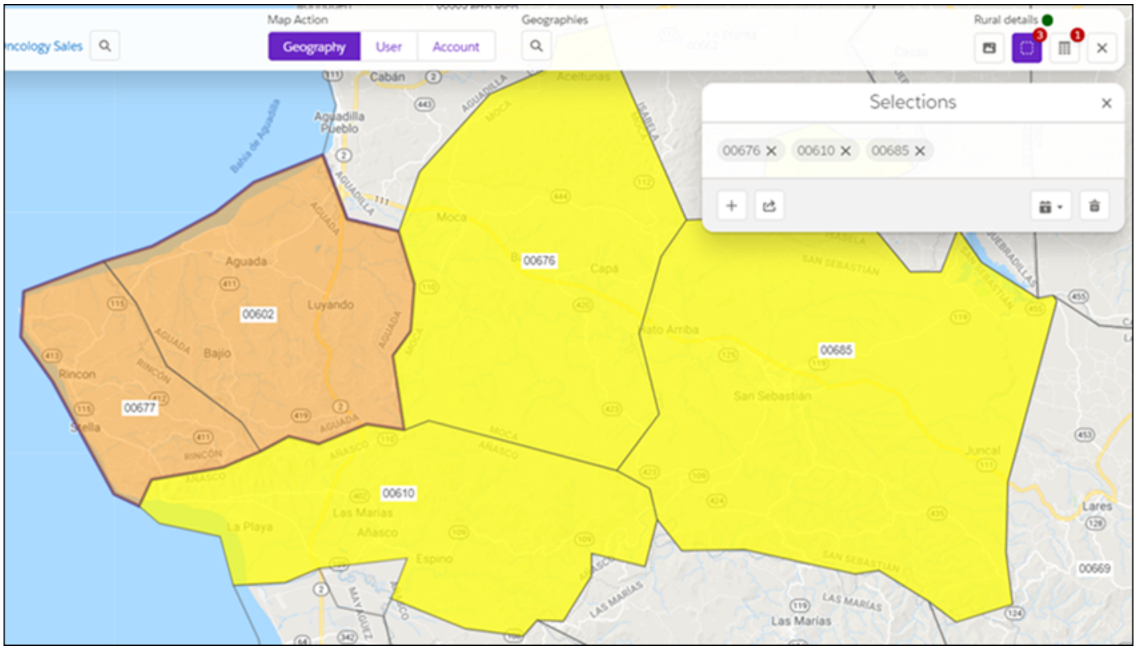
5. Click **Settings**, set the zoom to the level you want the geography boundaries to display for Details and Labels, then click **Save**.



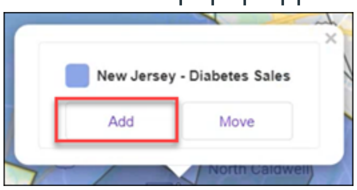
- Click **Zoom In** to set the level at a detailed view.
- Click **Zoom Out** to set the level at a broad view.
- Click **Display at current level** to match the current map zoom level.

6. Select the geographies you want to align to your territory using one of the following methods:

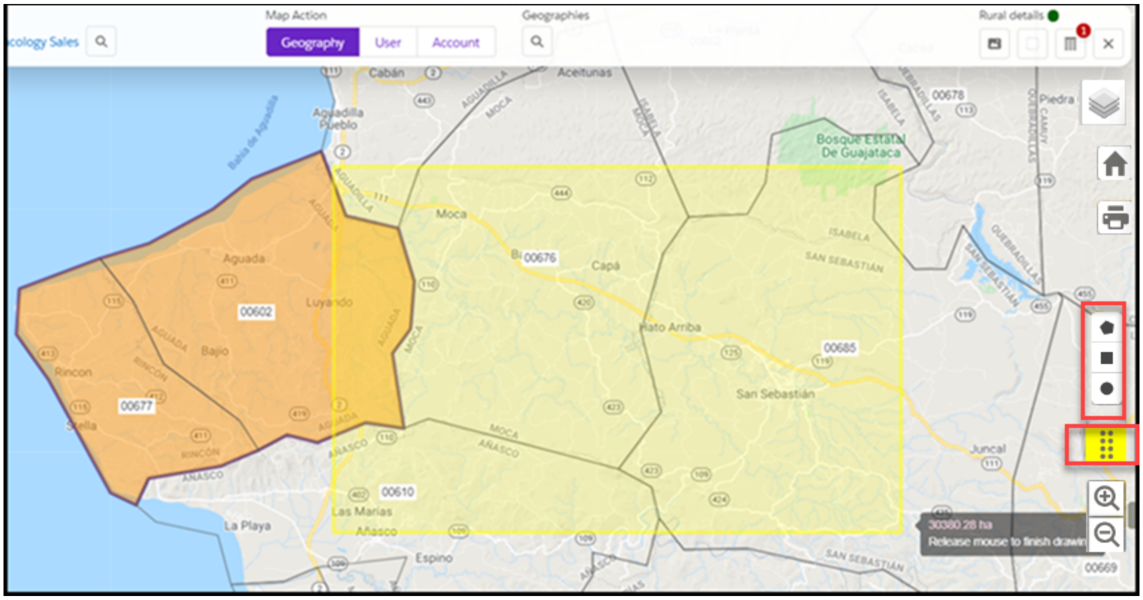
- Click the geography you want to align and drag it to the territory.



An add/move popup appears, where you can click **Add** to add the geography.

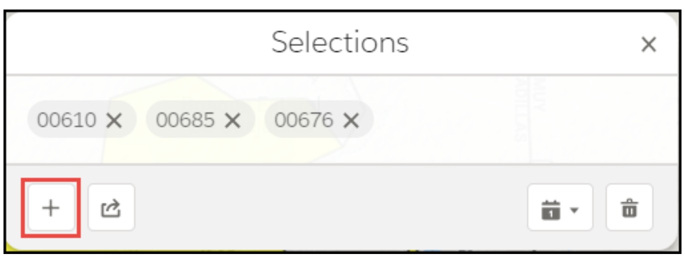


- Click **Features** , choose a selection shape, and then click and drag over the geographies you would like to align.

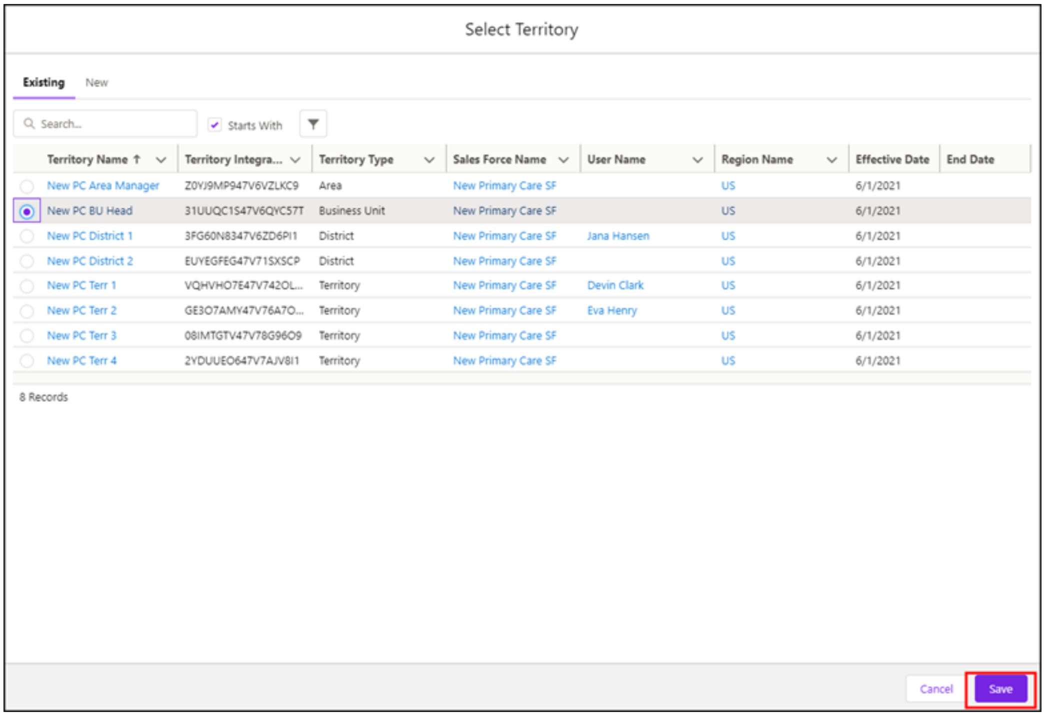


7. After you finish selecting the geographies, click **Selections**, and then select **Add**+.

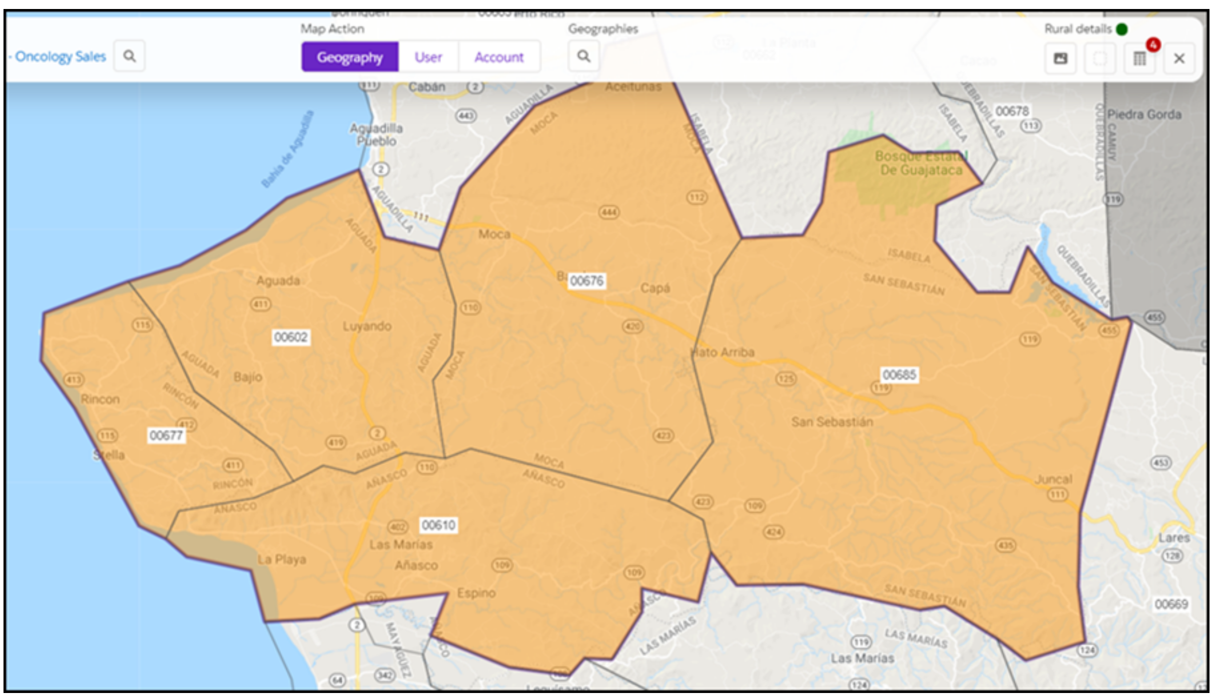
Note: Click **Delete** to remove the selections.



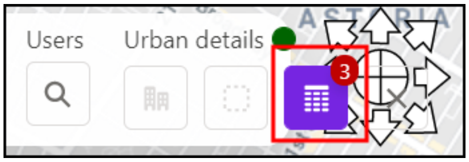
8. Select the territory you want to add the geographies to, then click **Save**.



The geographies are added to the territory.

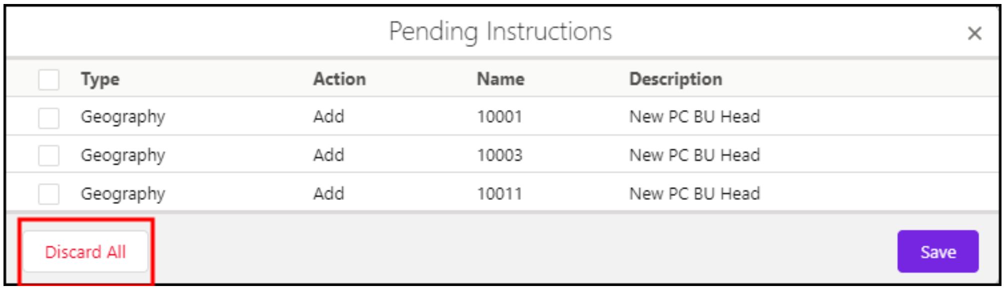


9. Click the **Pending Instructions** icon and review the changes.

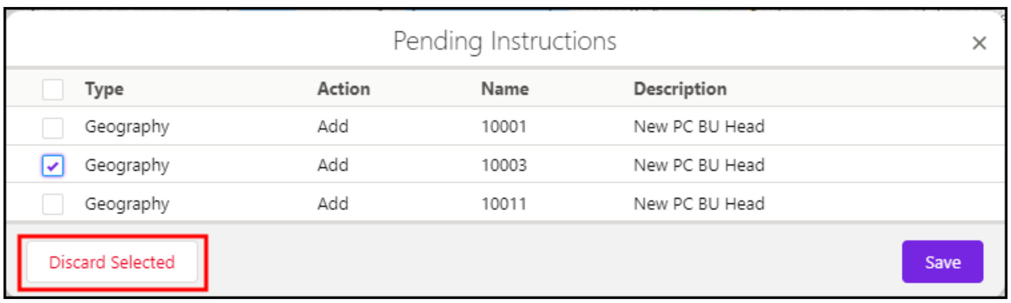


10. Do one of the following:

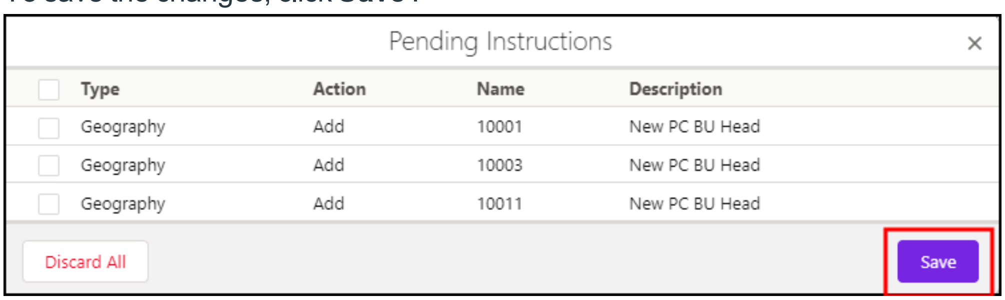
- To discard all changes, click **Discard All**.



- To discard a specific geography, select the corresponding check box, then click **Discard Selected**.



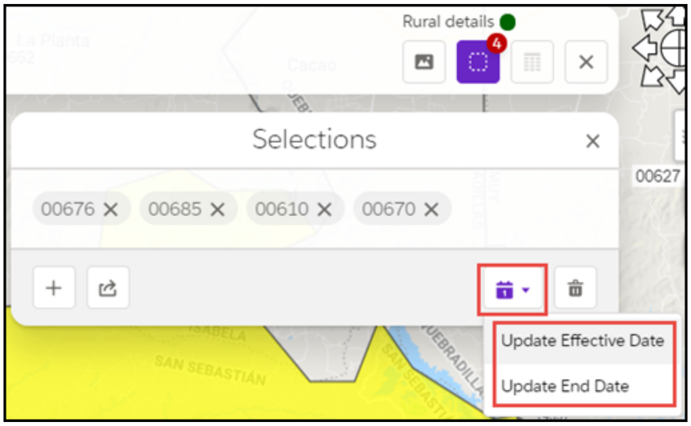
- To save the changes, click **Save** .



To update the effective date and end date of a geography

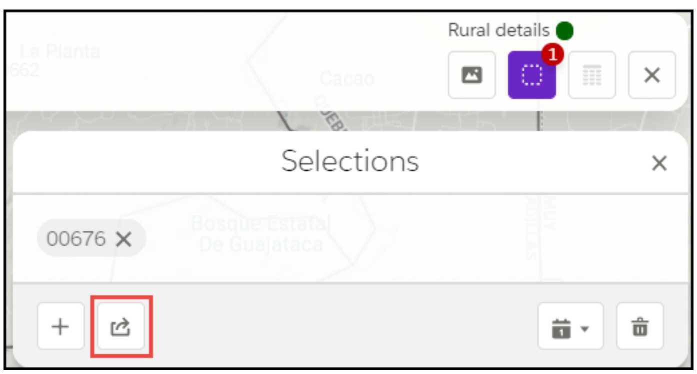
You can update a geography's effective/end dates to the scenario's effective/end dates.

1. Select the geography that contains the date you would like to update. See To align geographies to a territory using Maps for details on how to select a geography.
2. Click **Calendar** in the Selections window and select **Update Effective Date** or **Update End Date**.

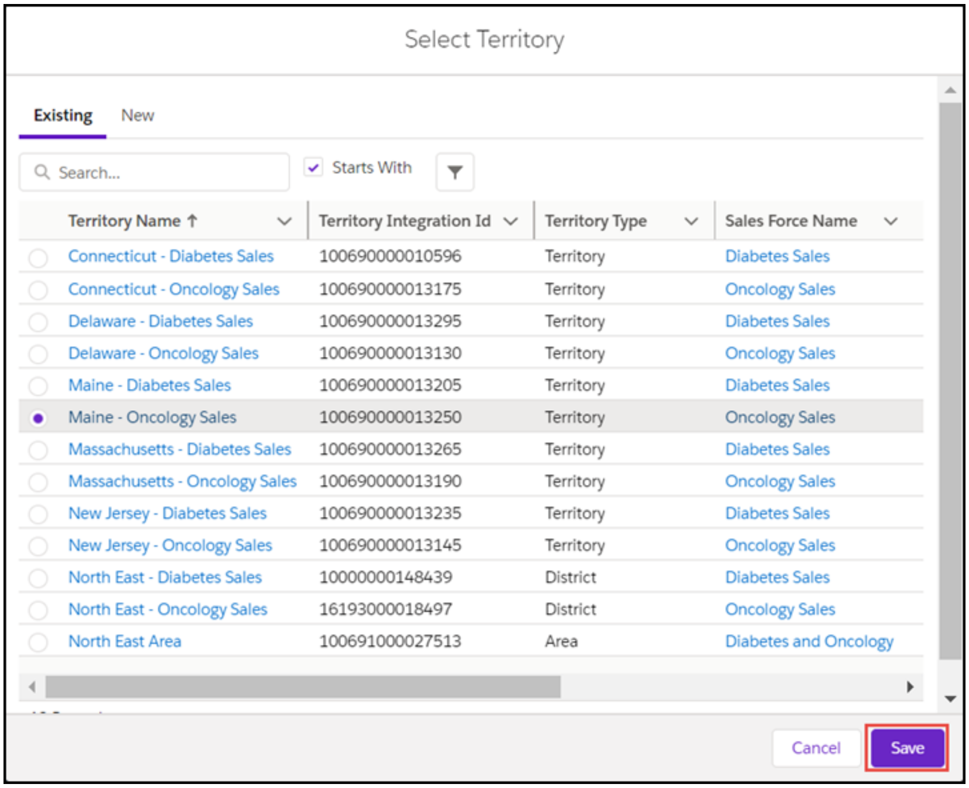


To move a geography to a different territory

1. Select the geography you would like to move. See To align geographies to a territory using Maps for details on how to select a geography.
2. Click **Move** in the Selections window.



3. Select the territory you would like to move the geography to, and then click **Save**.



Manage User Transactions Using Maps

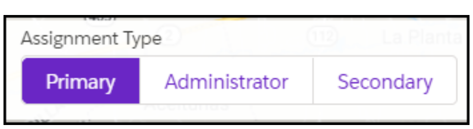
You can add users to a geography, move the user to a different geography, and update the user's effective and end dates using **Maps**.

To align users to a geography

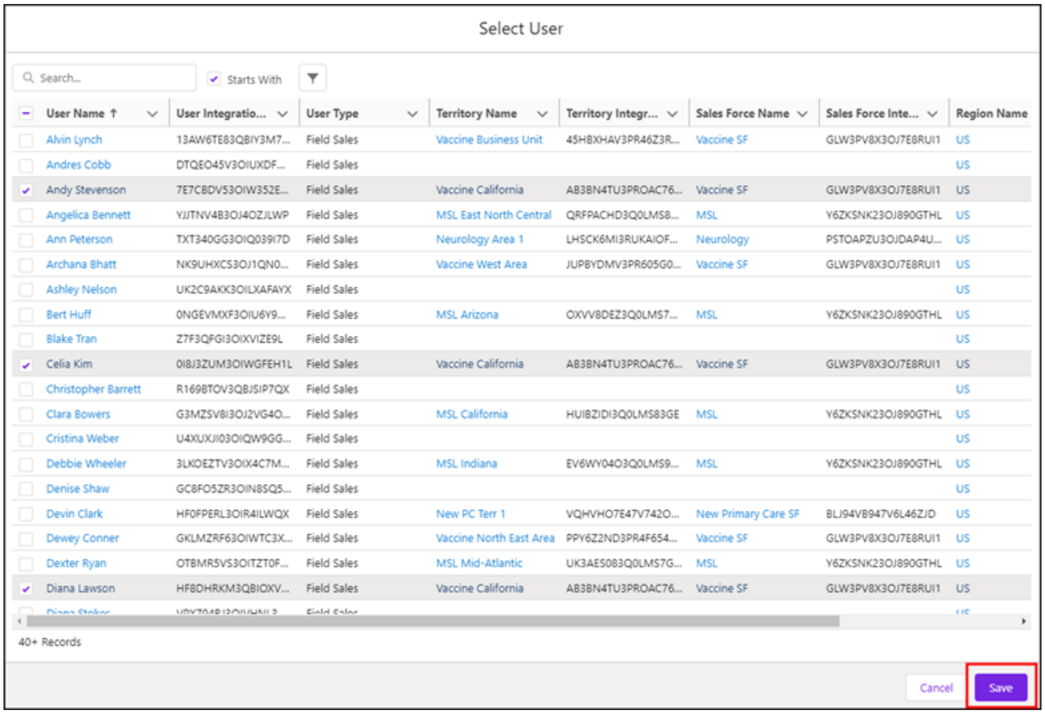
1. Select the territory you would like to work with. See Access Maps from a Scenario for details on selecting territories.

2. Click **User** from the **Map Action** section.

3. Select the **Assignment Type**.

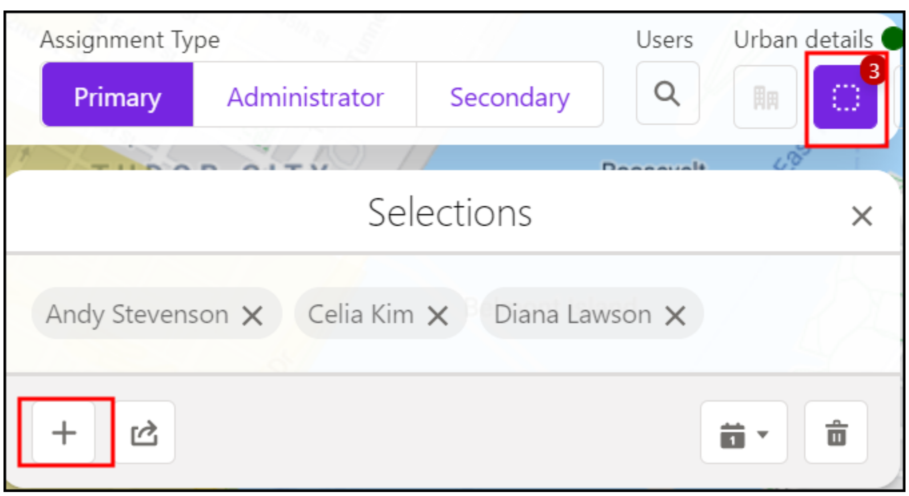


4. Click **Search** 🔍 for Users, select the users you want to align to the geography, then click **Save**.

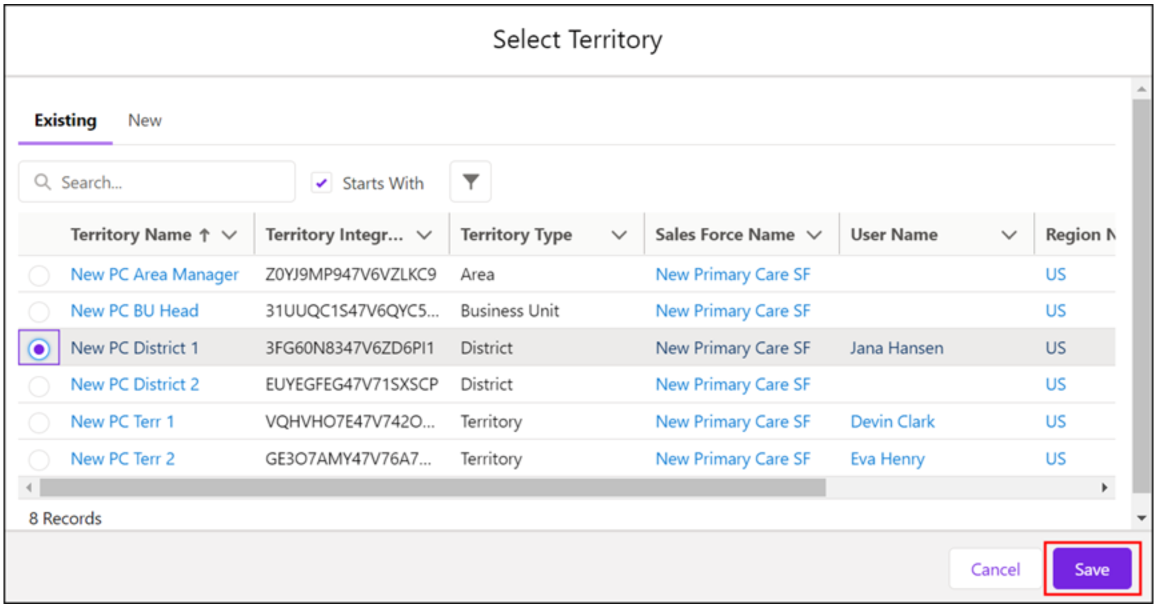


5. Click **Selections** , then click **Add** +.

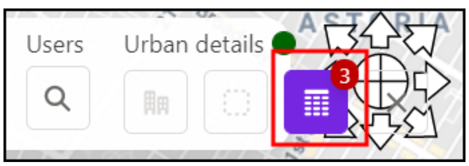
Note: Click **Delete** 🗑 to remove the selections.



6. Select the territory you want to add the users to, then click **Save**.

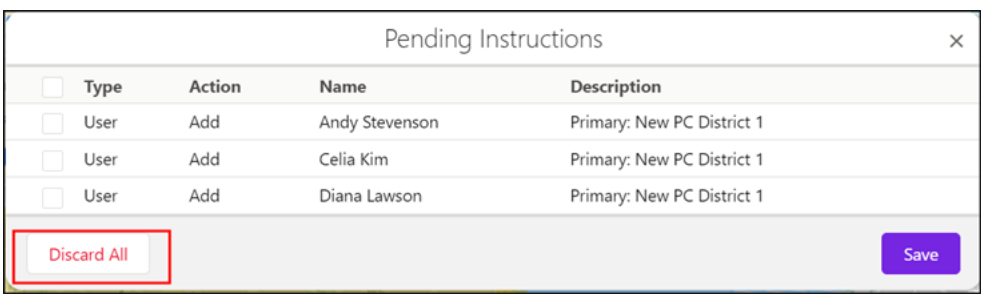


7. Click the **Pending Instructions** icon and review the changes.



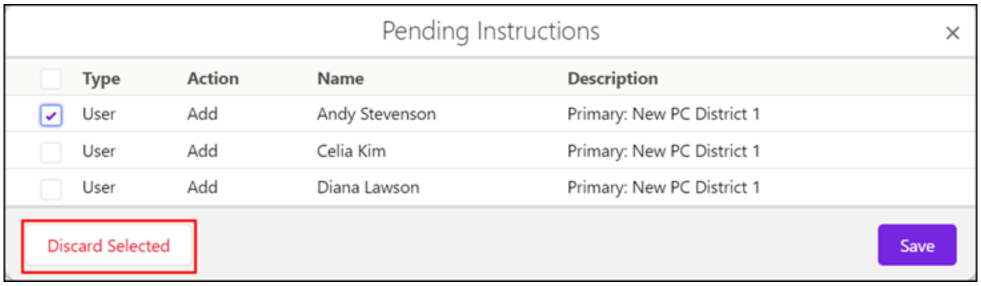
8. Do one of the following:

    - To discard all changes, click **Discard All**.

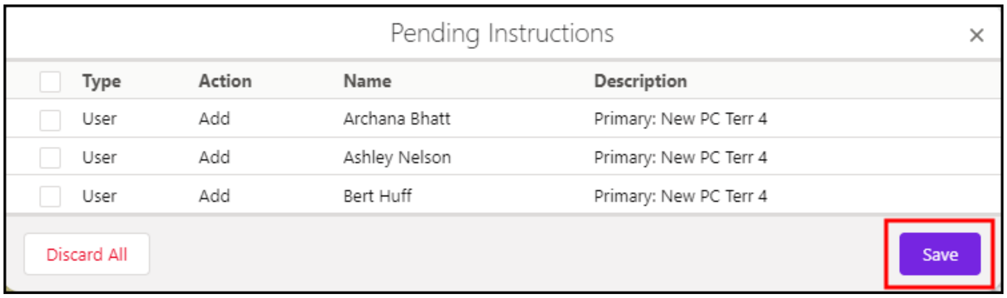


    - To discard a specific user, select the corresponding check box, then click **Discard**

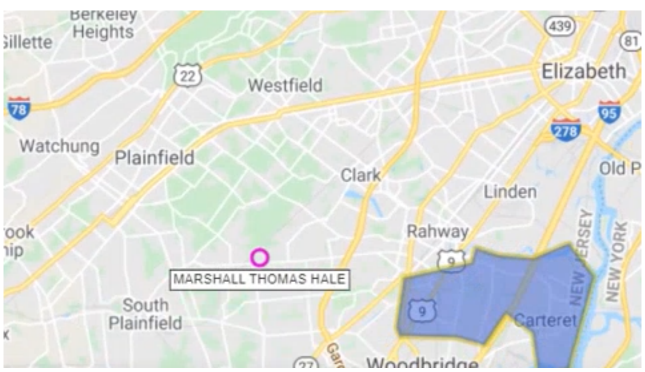
Selected.



- To save the changes, click **Save** .



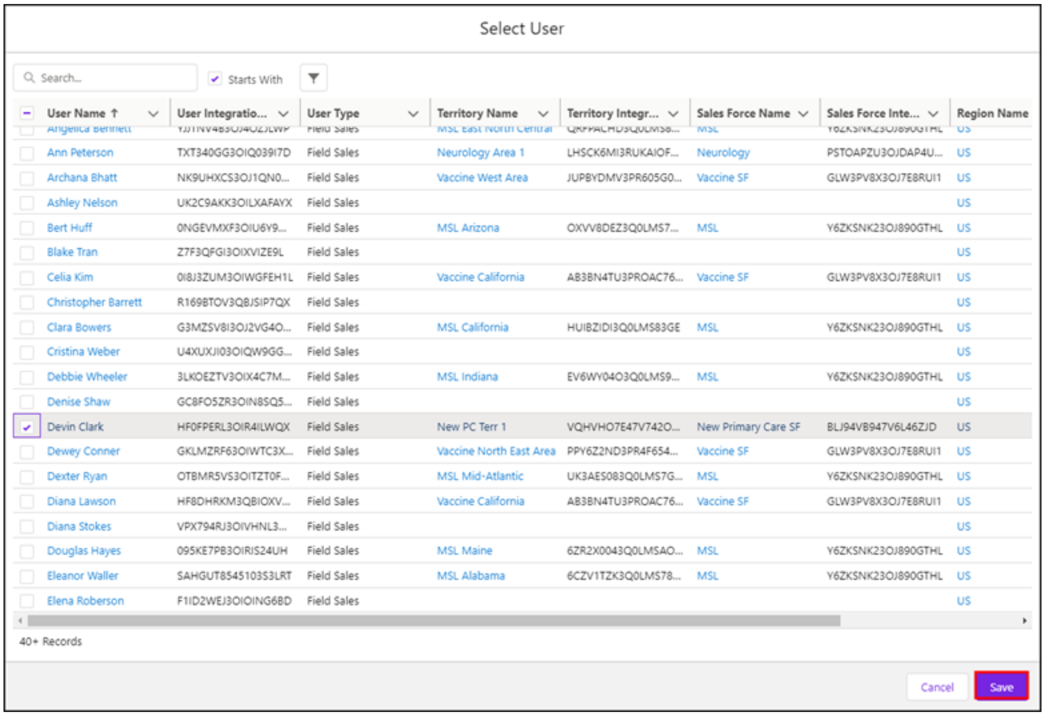
The users are denoted by PINS on the map.



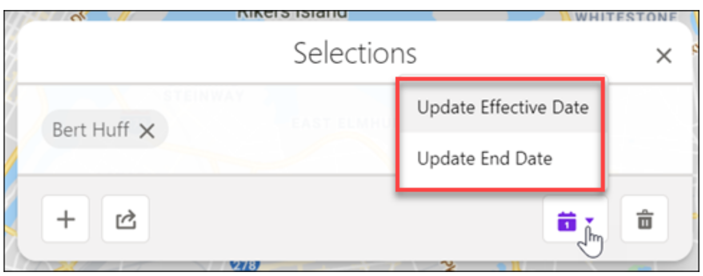
To update effective date and end date of a user

You can update a user's effective/end dates to the scenario's effective/end dates.

1. From the Select User window, select the user whose effective date or end date you would like to update, and then click **Save**.



2. Click **Calendar** in the Selections window and select **Update Effective Date** or **Update End Date**.

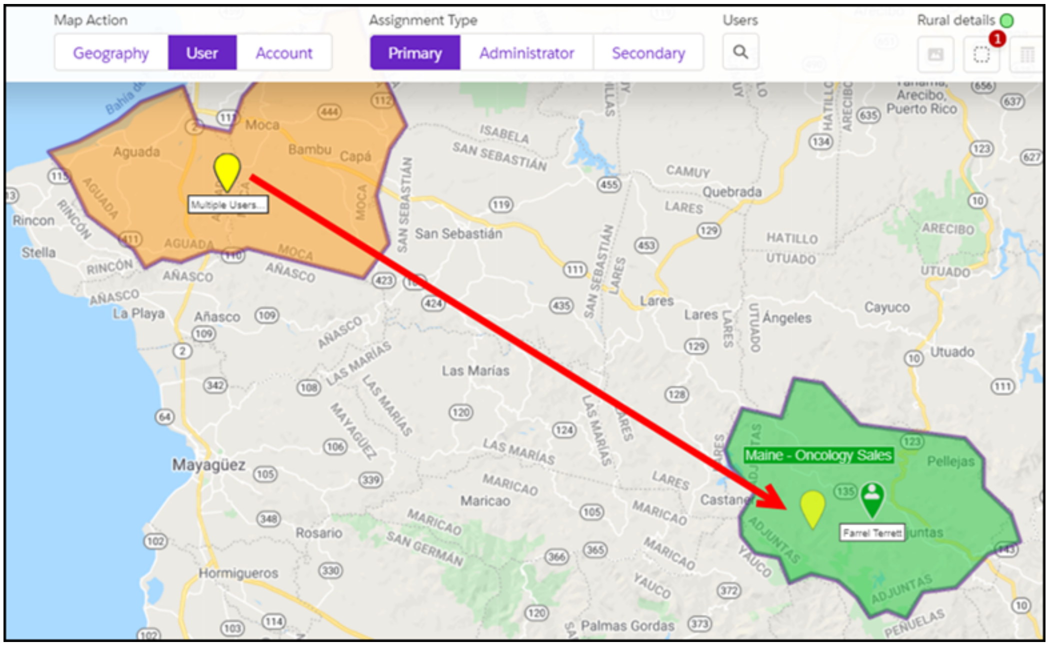


To move a user to a different geography

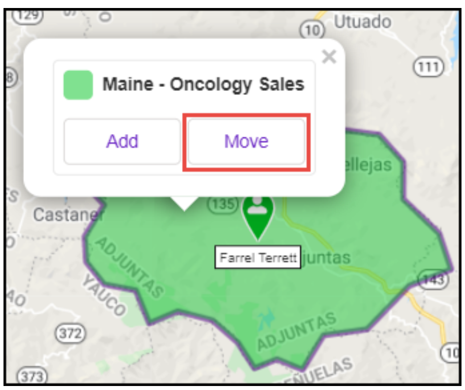
You can move a user to a different geography using drag and move or select to move.

Drag and move:

1. Click the user's PIN and drag it to another geography.



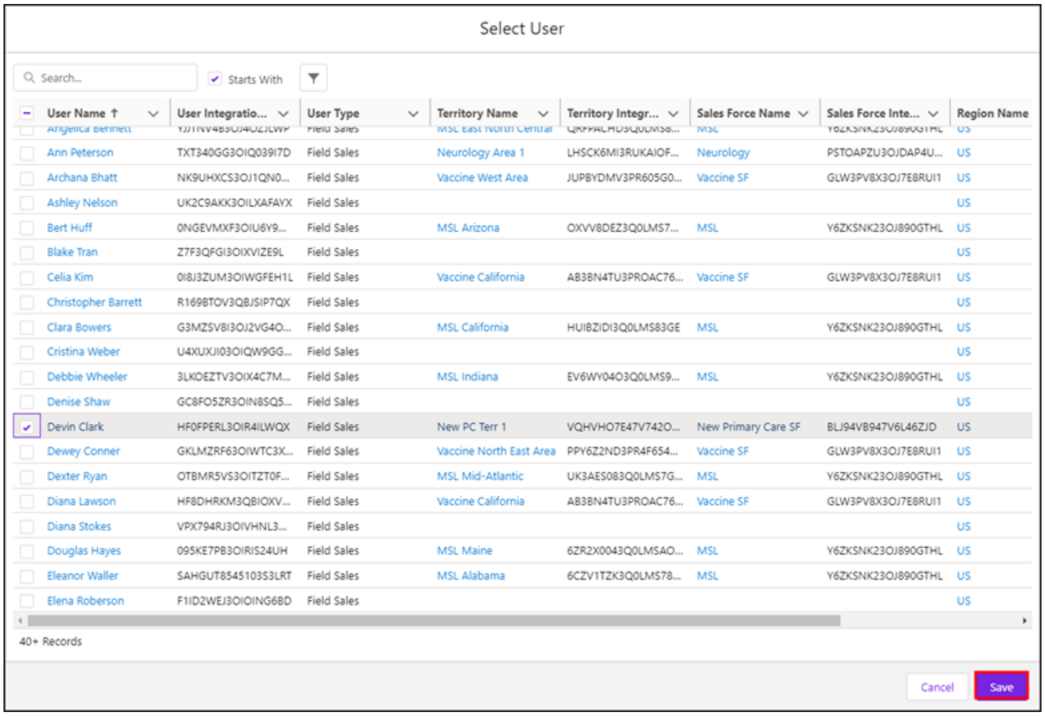
2. Click **Move**.



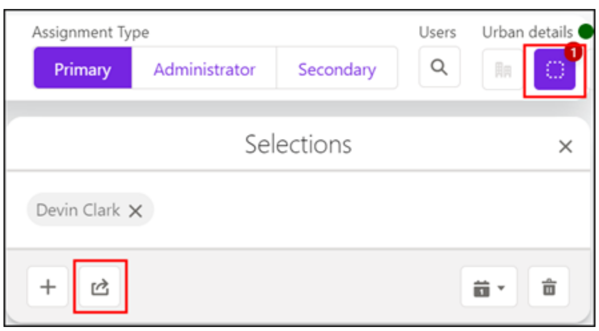
3. Continue to step 2. below.

Select to move:

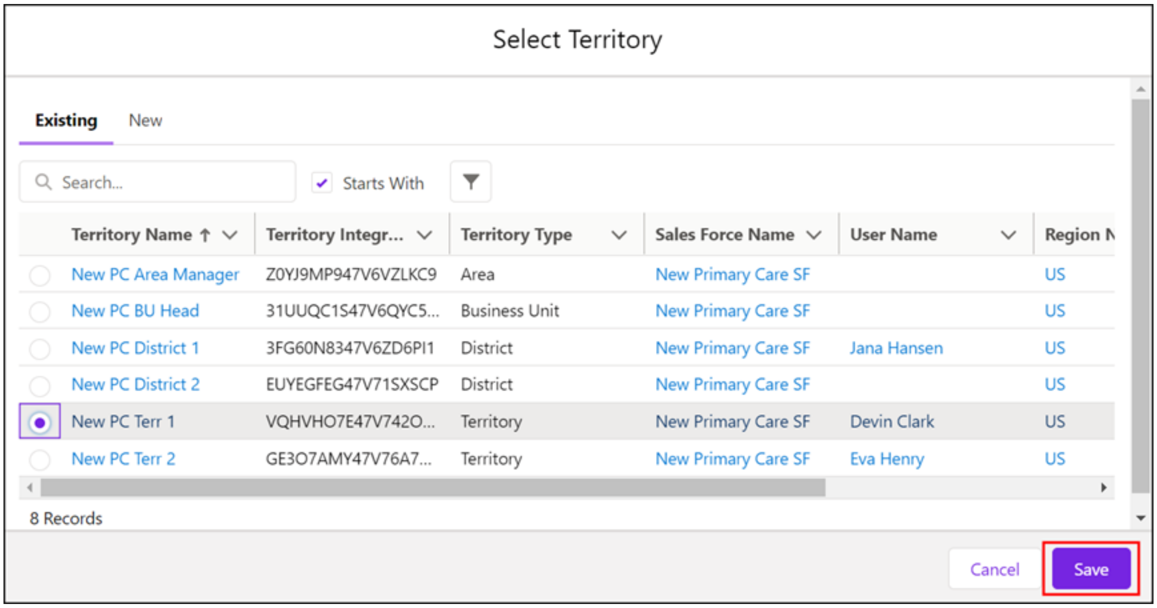
1. Select the user you want to move, then click **Save**.



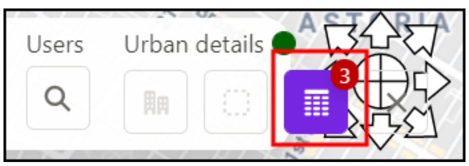
2. Open the Selections window, then click **Move**.



3. Select the territory to which you want to move the user, then click **Save**.

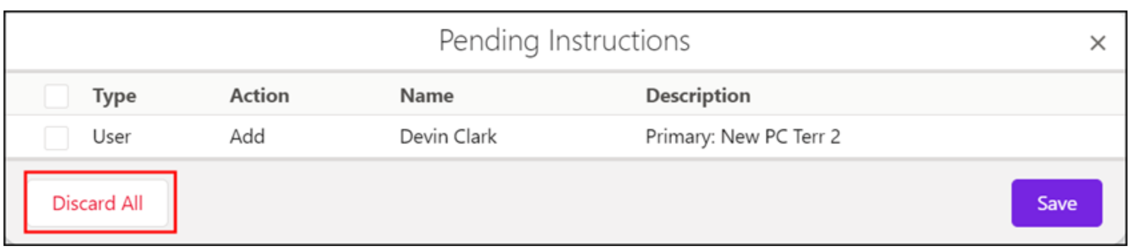


4. Click the **Pending Instructions** icon and review the changes.

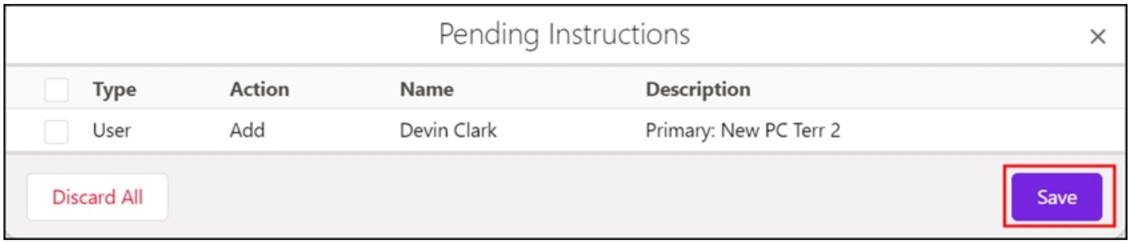


5. Do one of the following:

- To discard all changes, click **Discard All**.



- To save the changes, click **Save**.

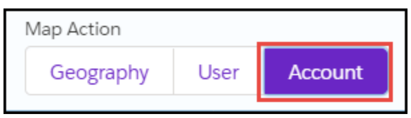


Manage Account Transactions Using Maps

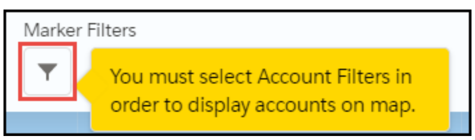
You can add accounts to a geography, move the account to a different geography, and update the account's effective and end dates using **Maps**.

To align accounts to a geography

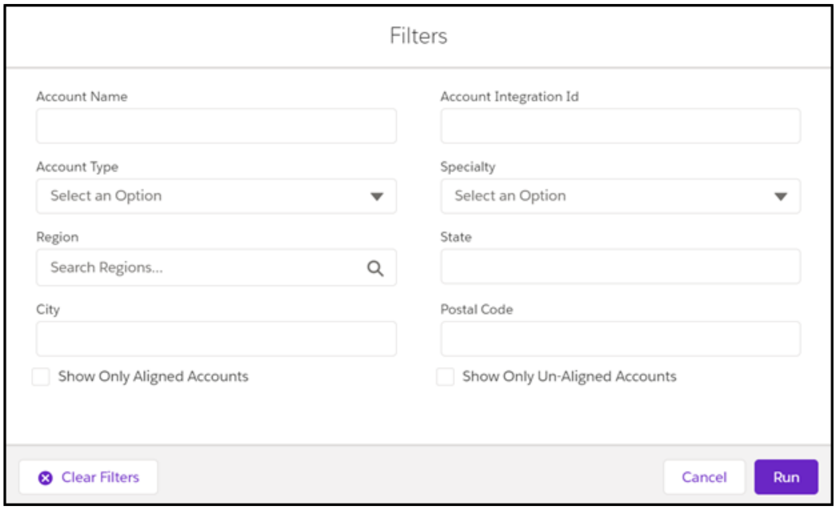
1. Select the territory you would like to work with. See Access Maps from a Scenario for details on selecting territories.
2. Click **Account** from the **Map Action** section.



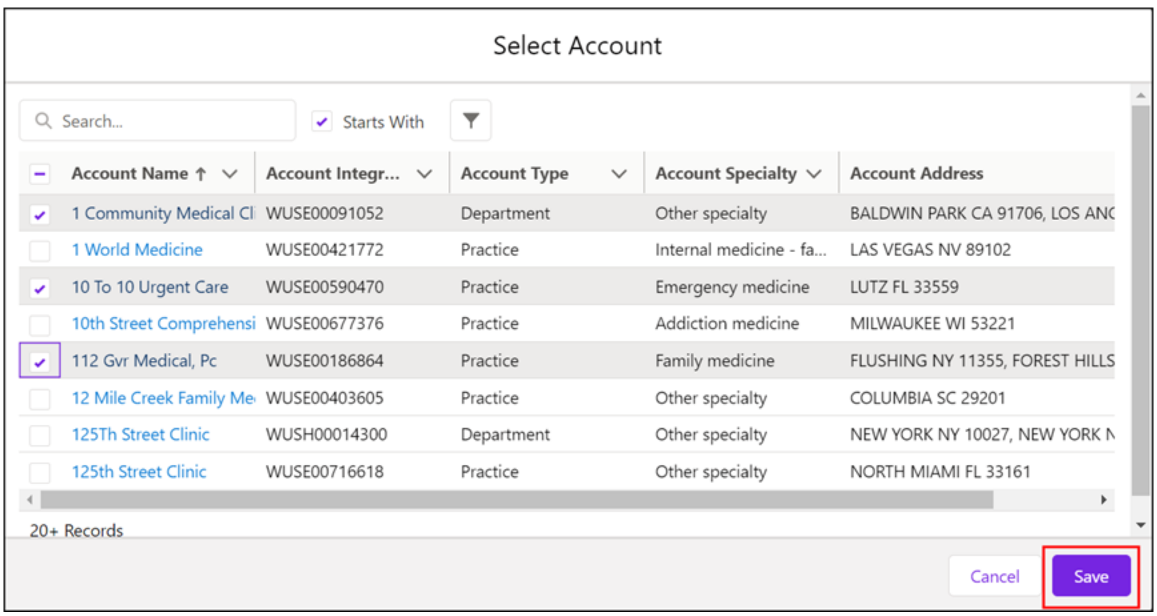
3. Click **Account Filters** to filter the account information.



4. Enter information for the account, and then click **Run**.

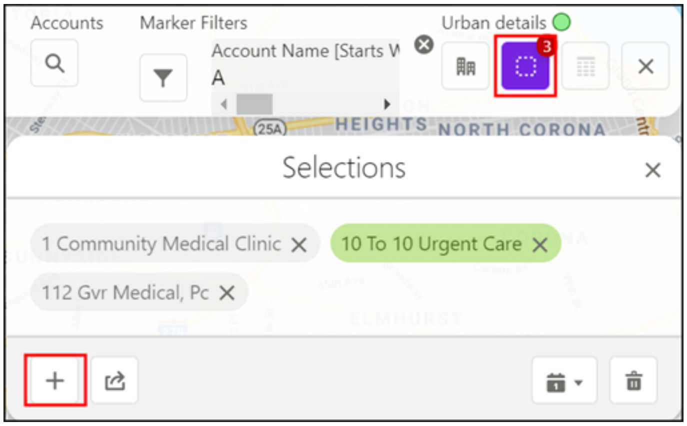


5. Click **Search** for Accounts, select the accounts you want to add to a geography, then click **Save**.

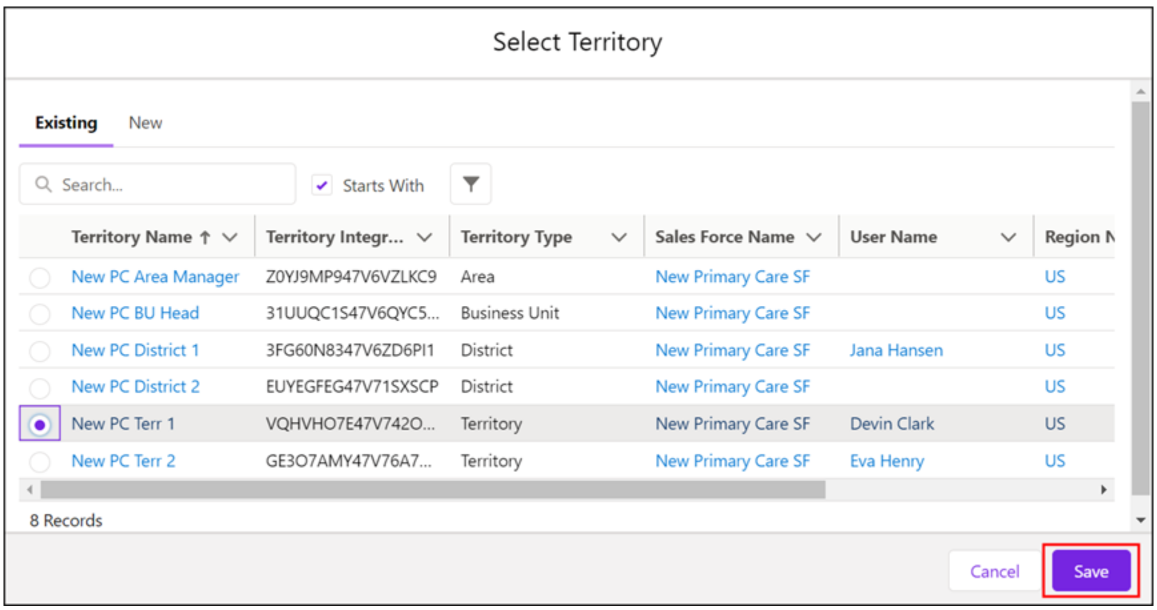


6. Click **Selections**, then click **Add+**.

> **Note:** Click **Delete** to remove the selections.



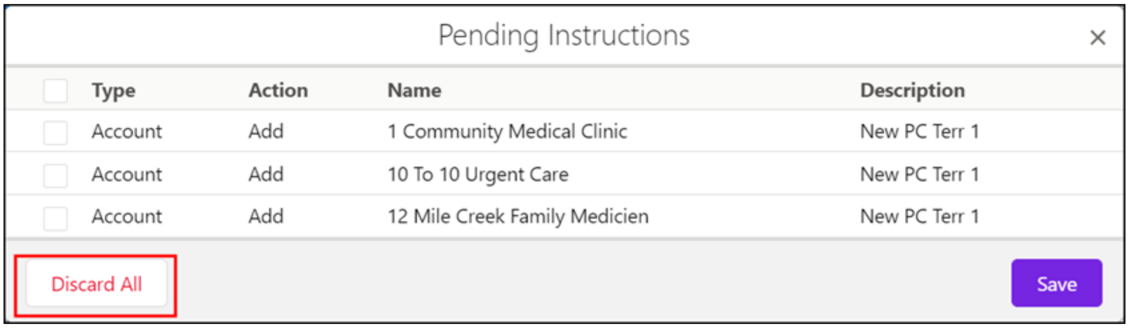
7. Select the territory you would like to add the accounts to, then click **Save**.



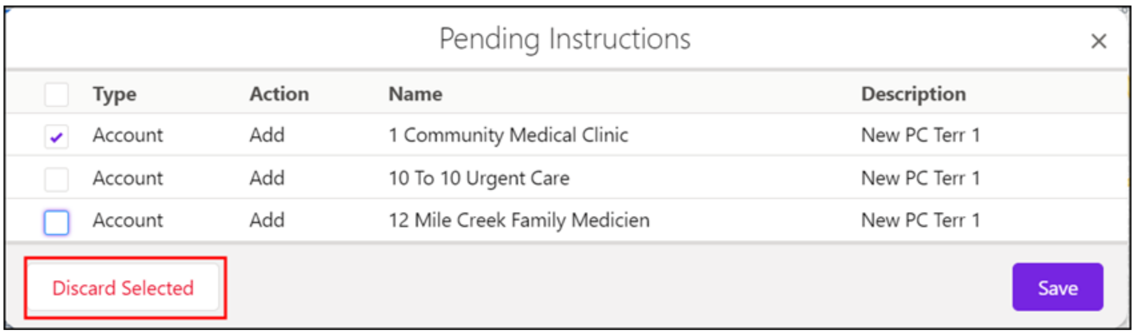
8. Click **Pending Instructions**  and review the changes.

9. Do one of the following:

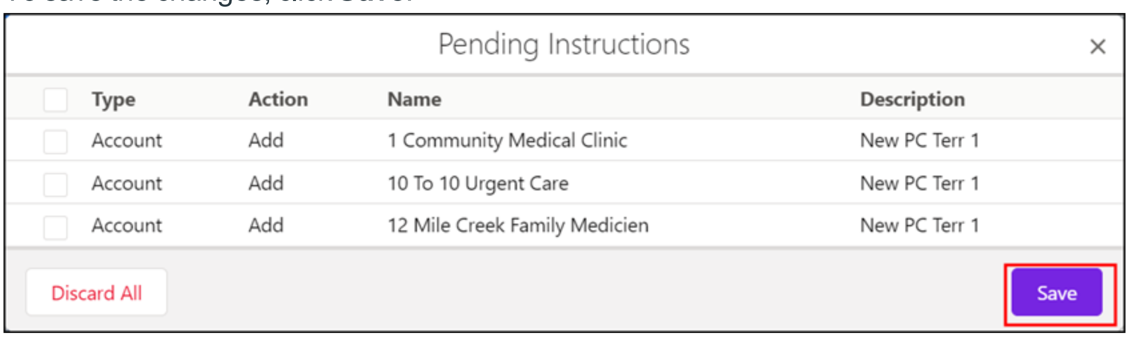
- To discard all changes, click **Discard All**.



- To discard a specific account, select the corresponding check box, then click **Discard Selected**.



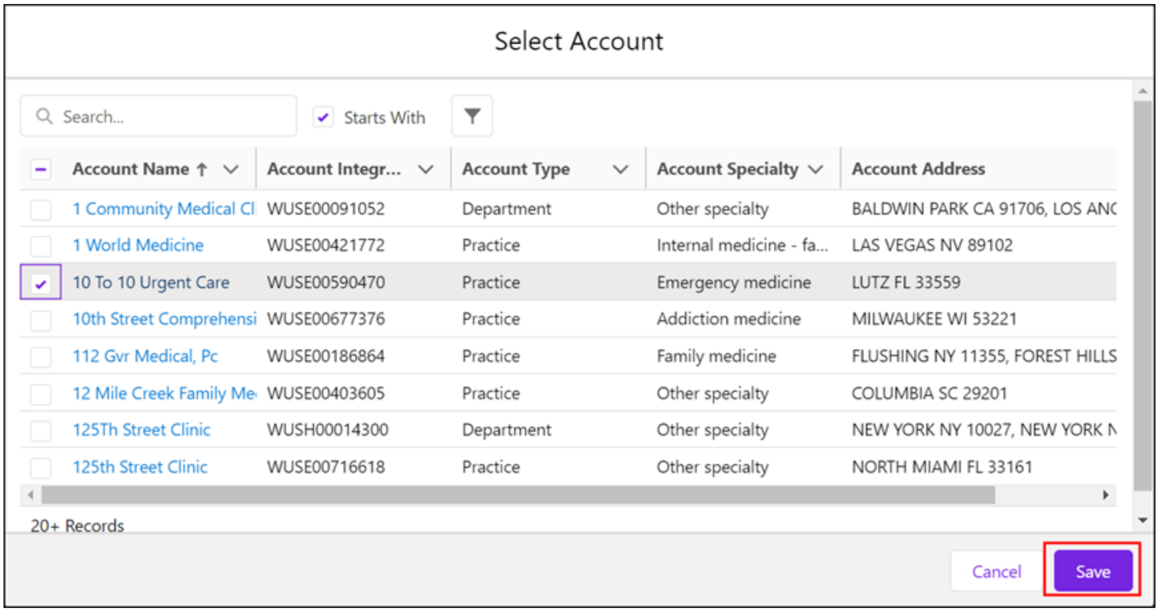
- To save the changes, click **Save**.



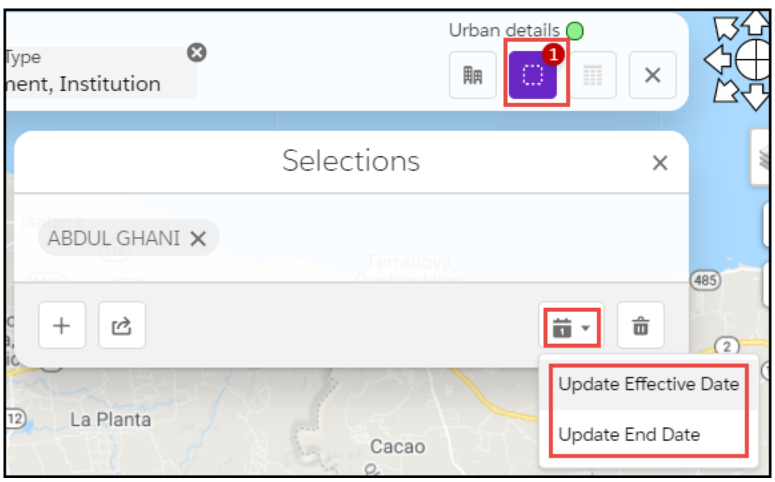
To update effective date and end date of an account

You can update an account's effective/end dates to the scenario's effective/end dates.

1. From the Select Account window, select the account whose effective date or end date you would like to update, and then click **Save**.

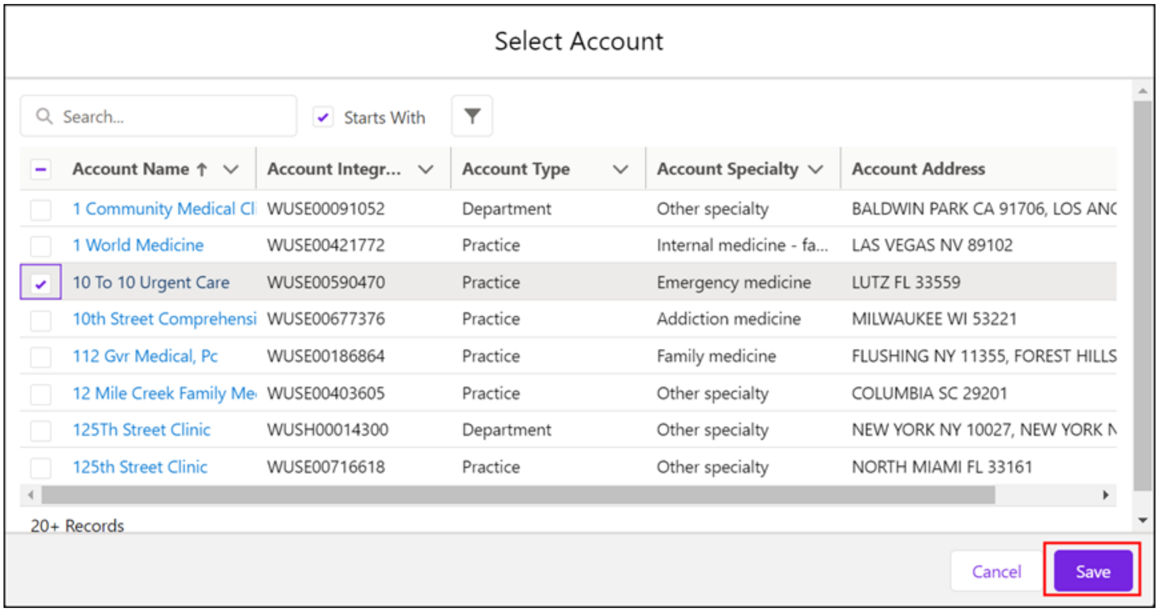


2. Click **Calendar** in the Selections window and select **Update Effective Date** or **Update End Date**.

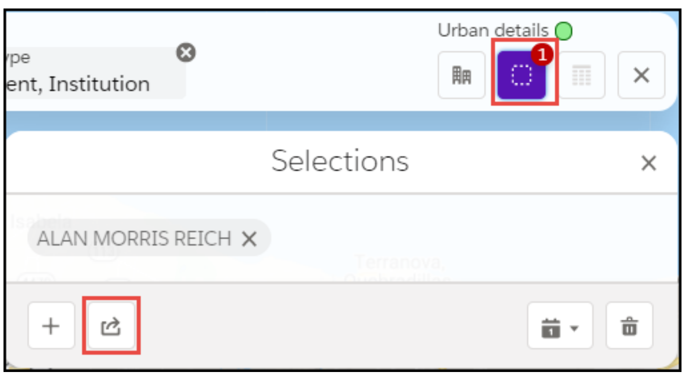


To move an account to a different geography

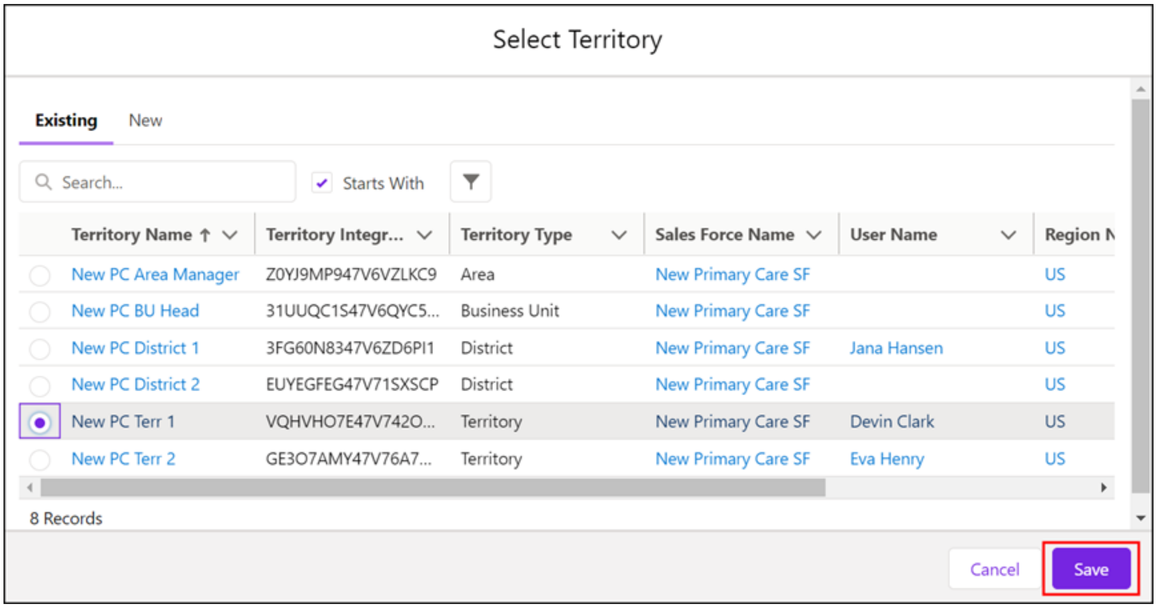
1. From the Select Account window, select the account you would like to move, then click **Save**.



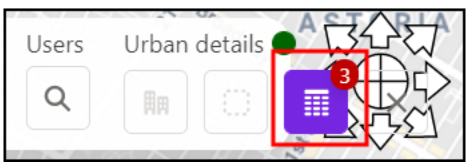
2. Open the Selections window, and then click **Move**.



3. Select the territory you want to move the account to, then click **Save**.

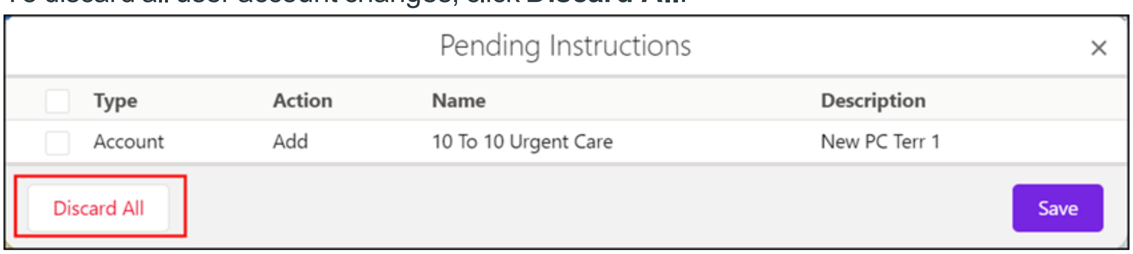


4. Click the **Pending Instructions** icon and review the changes.

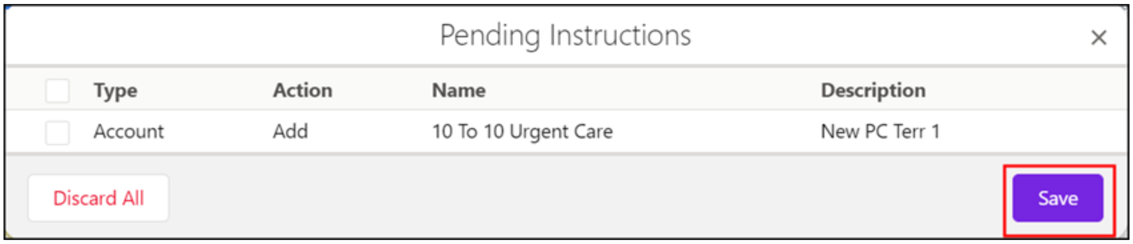


5. Do one of the following:

- To discard all user account changes, click **Discard All**.



- To save the changes, click **Save** .

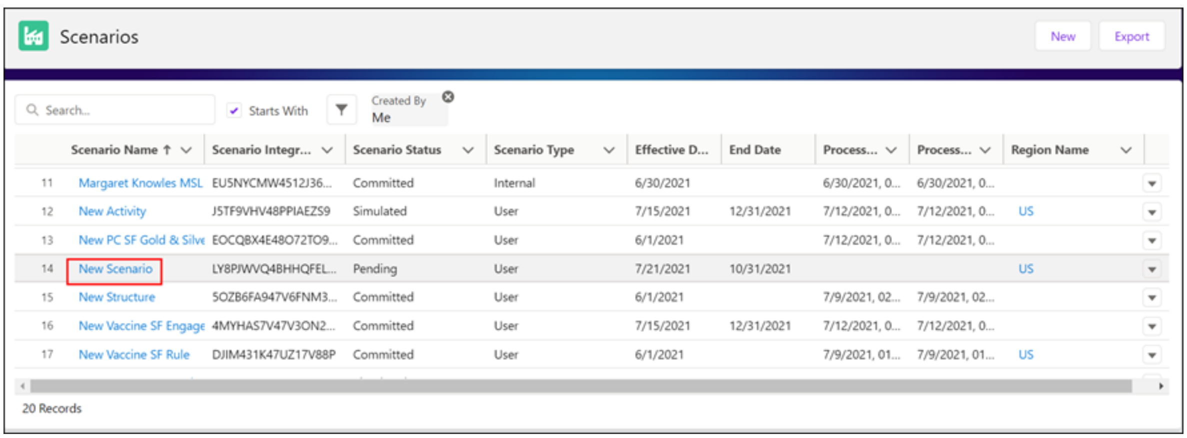


Copy a Rule in a Scenario

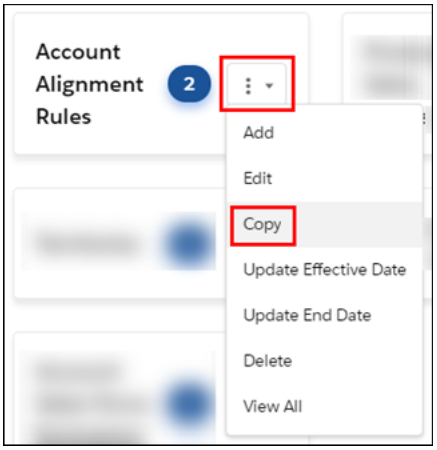
You can copy rules if the status of the scenario is pending or simulated.

To copy a rule in a scenario

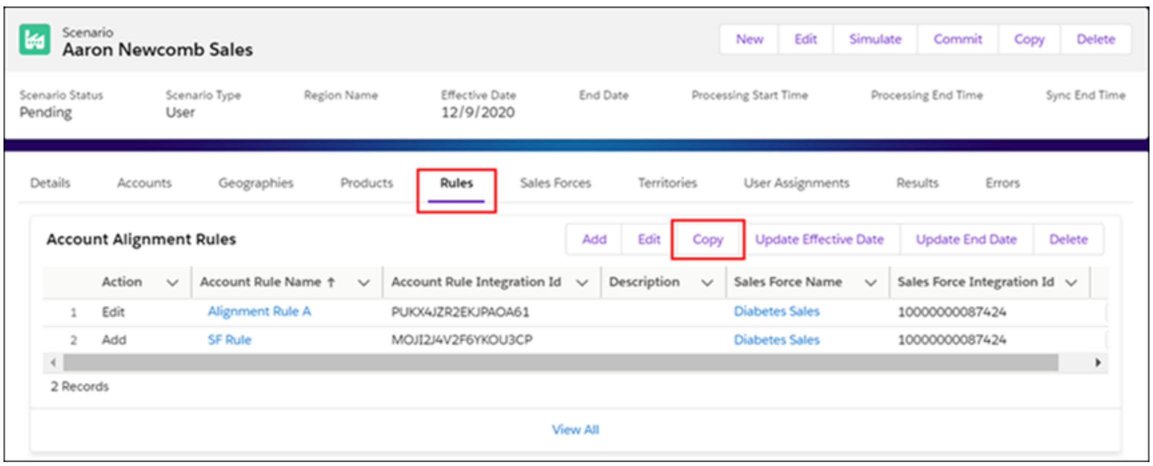
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the rule you want to copy.



3. Do one of the following:
   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **Account Alignment Rules**, and then select **Copy**.

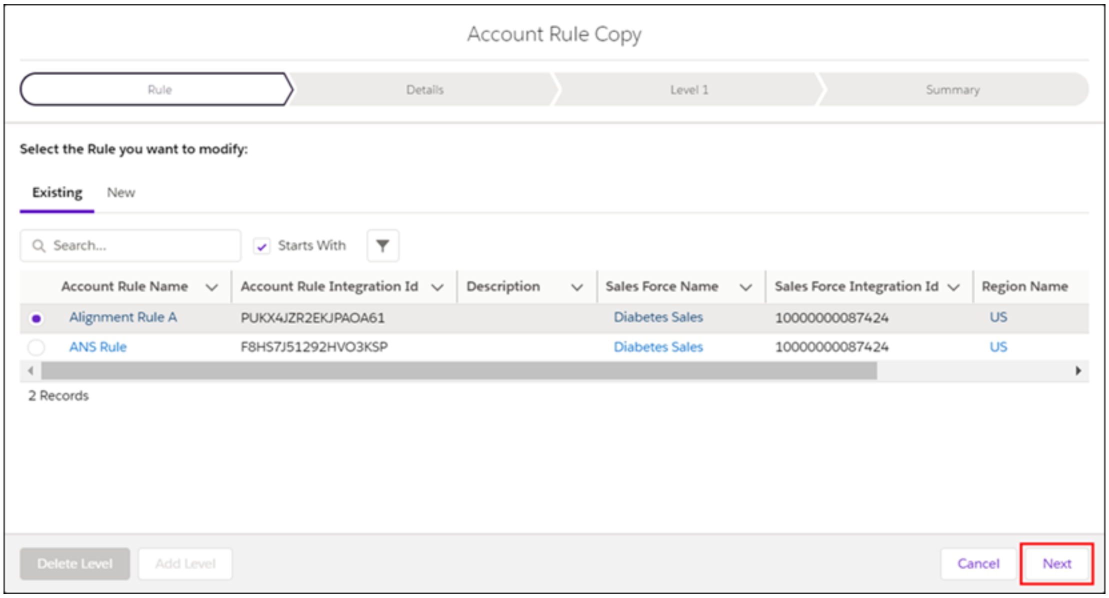


- Click the **Rules** tab and select **Copy** for Account Alignment Rules.

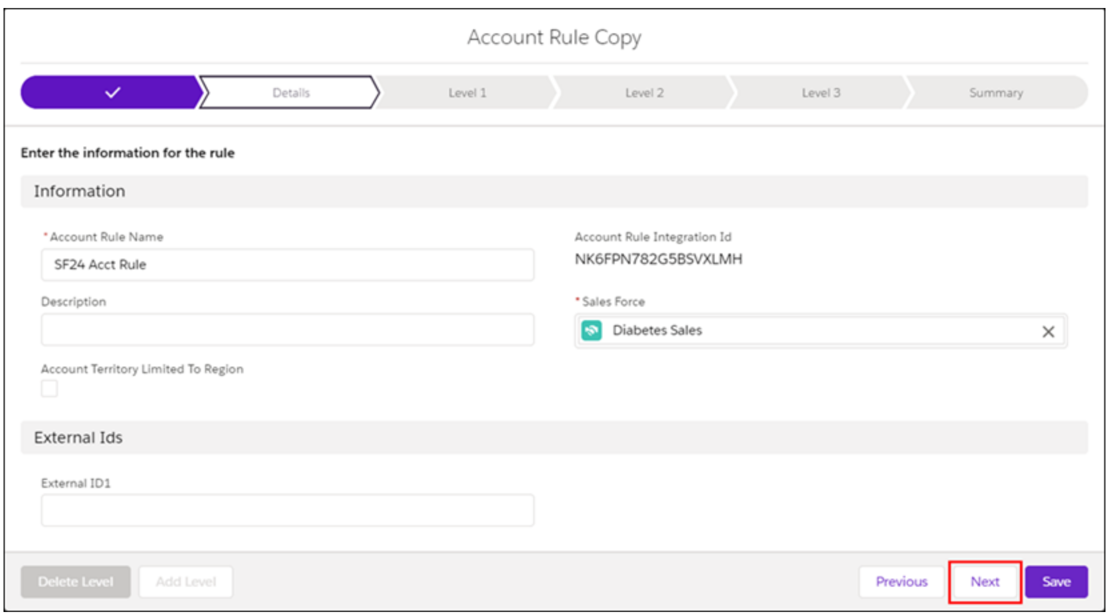


4. Select the check box next to the rule you want to copy, and then click **Next**.

> **Note:** The **Existing** tab contains all current rules in the database and the **New** tab contains the rules that were just created in the current scenario.

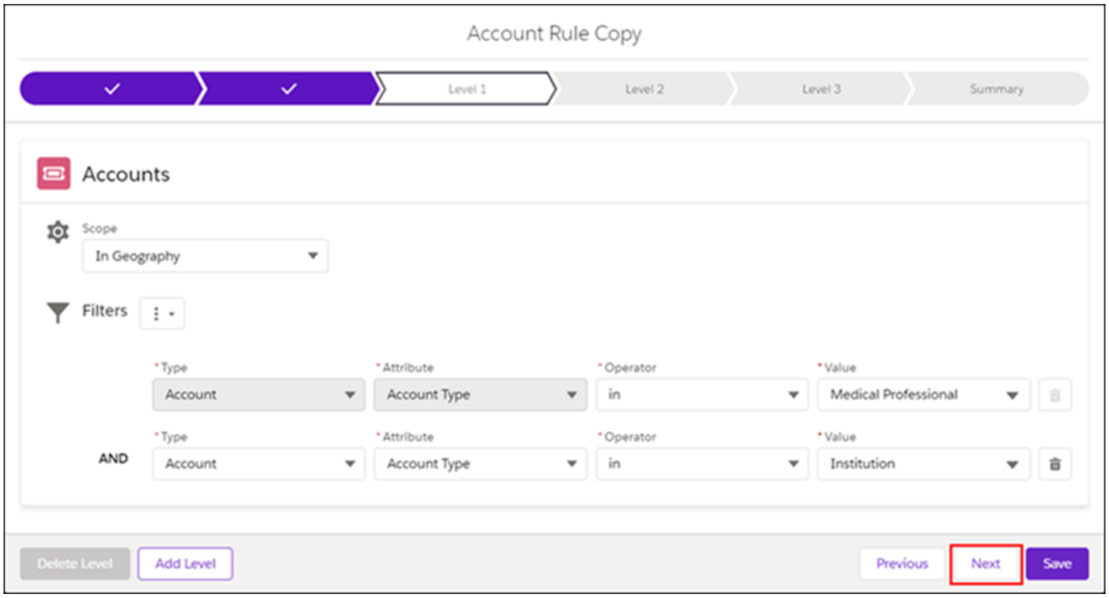


5. Enter the information for the rule and click **Next**.

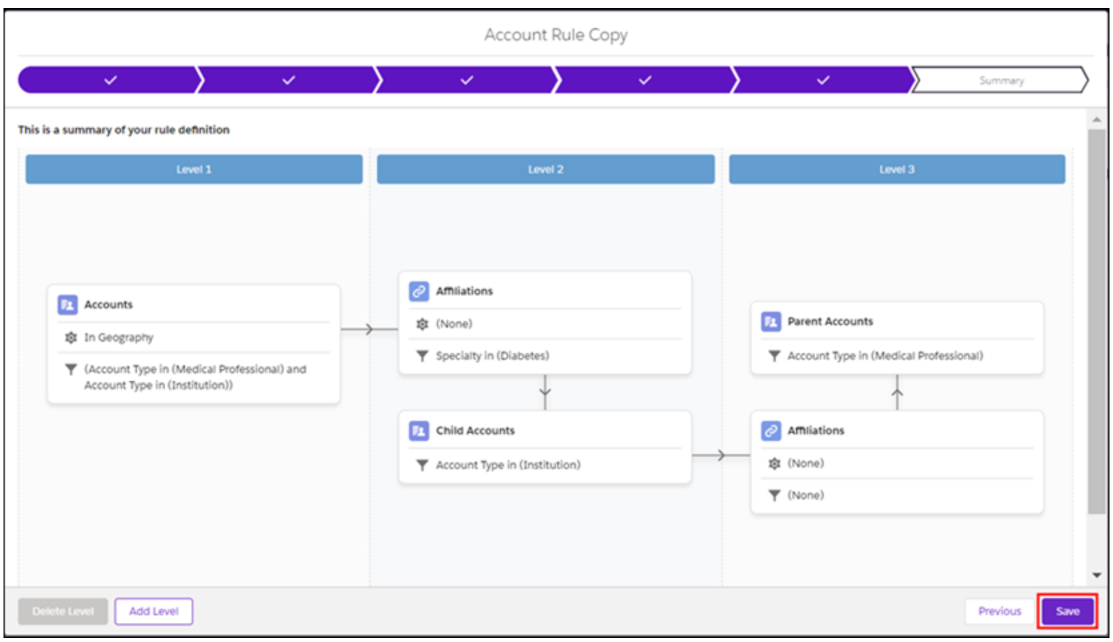


For information about rule fields, see [Add Account Alignment Rules or Account Product Restriction Rules to a Scenario].

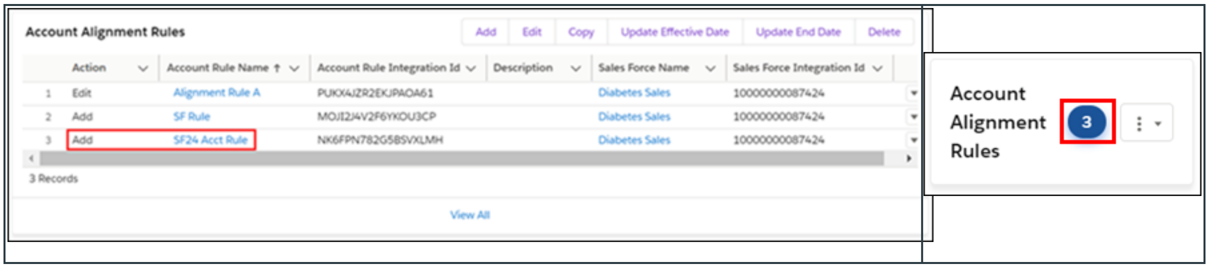
6. Enter details of groups, conditions, or levels, if applicable, then click **Next**.



7. Review the summary of your rule definition and if it's accurate, click **Save**. If you want to update the definition, click **Previous** and make updates.



The copied rule has been added to the **Account Alignment Rules** section of the **Rules** tab and is indicated on the transaction card in the **Overview** section of the **Details** tab.



Link a Scenario to an Adjudication (for HO users)

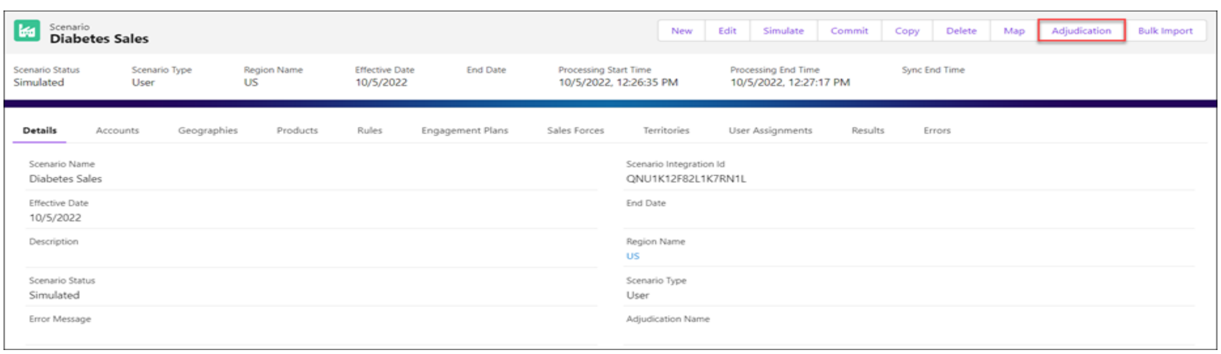
If you have access to an adjudication process for a future date, you can link a scenario to the adjudication after the scenario is simulated. After a scenario-adjudication link is established, it cannot be linked to a different adjudication.

Note: The scenario must first be simulated before you can link it to an adjudication. For information on scenario creation, see:

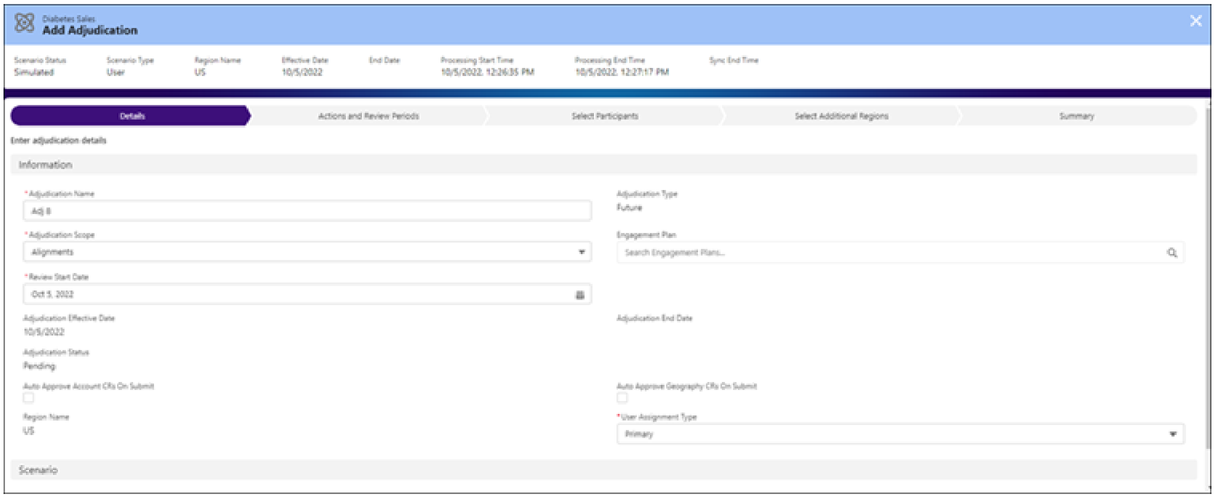
- Create a New Scenario
- Add Transactions and Rules
- Simulate a Scenario

To link a scenario to an adjudication

1. Open the scenario and click **Adjudication**.

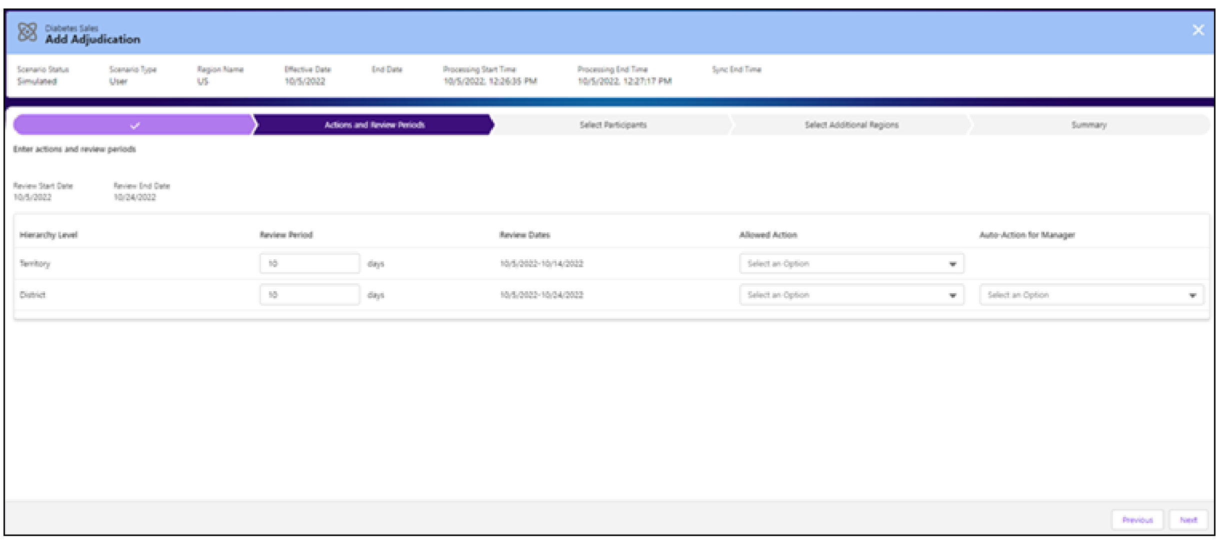


2. Enter Adjudication details, then click **Next**.



- **Adjudication Name**: Name of the adjudication you would like to link the scenario to.
- **Review Start Date**: The start of the review period.
- **User Assignment Type**: The user assignment type, such as Primary, Secondary, etc.

3. Enter actions and review periods, then click **Next**.

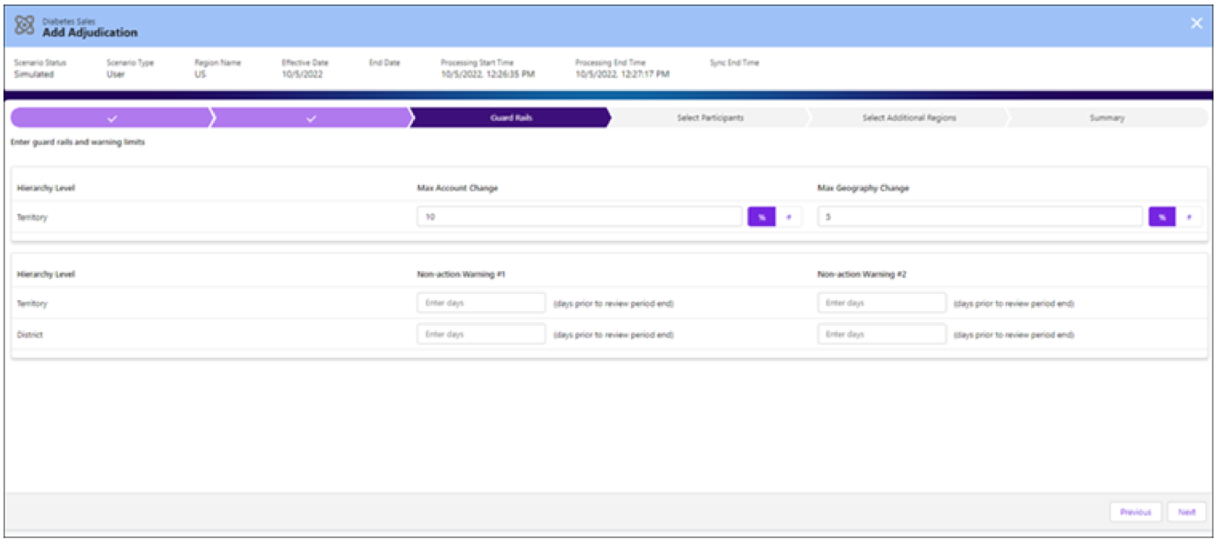


- **Hierarchy Level**: Read-only; Territory (Rep) and District (Manager).
- **Review Period (Days)**: Enter the number of days in the review cycle for the Territory and District.

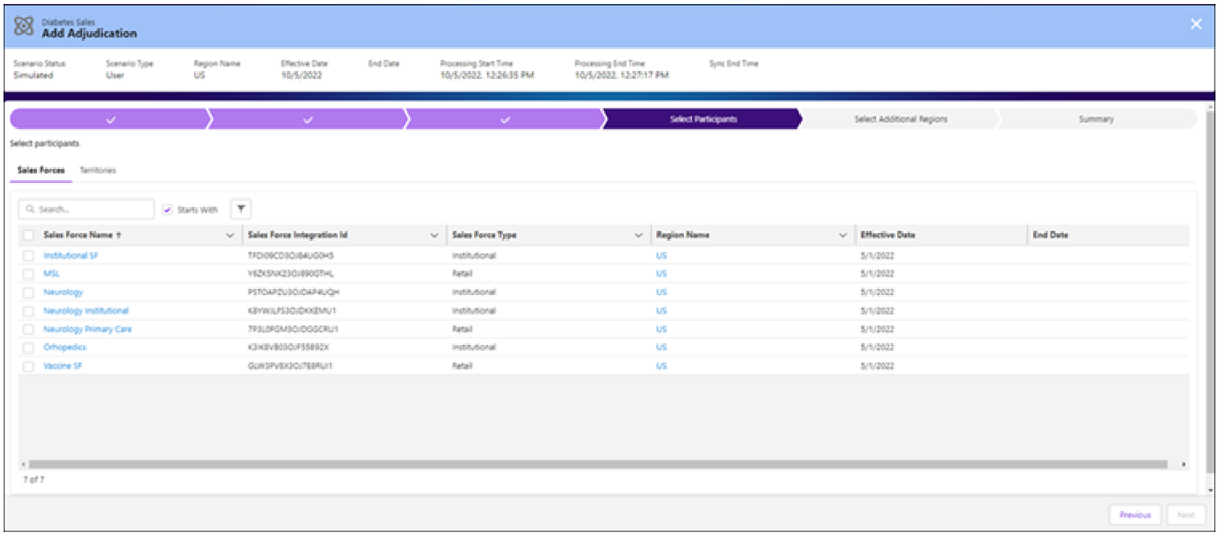
Note: The District Manager will have access to the adjudication starting on the same day as the Rep, but the DM will have an additional 10 days from the Rep's end date to review the adjudication.

- **Allowed Action**: Select the actions allowed for the Territory and District, such as *Add*, *Approve/Reject*, *Delete*, and *View*.
- **Auto-Action for Manager**: Select *Approve* to automatically approve the Rep's changes or *Reject* to automatically reject the changes.

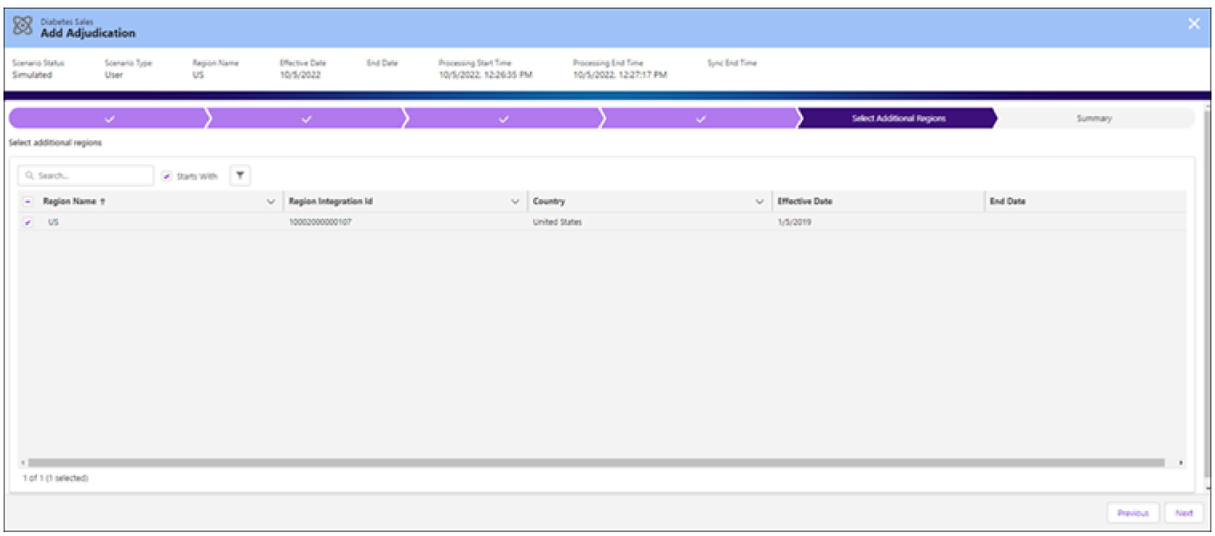
4. Enter Guard Rails, then click **Next**.



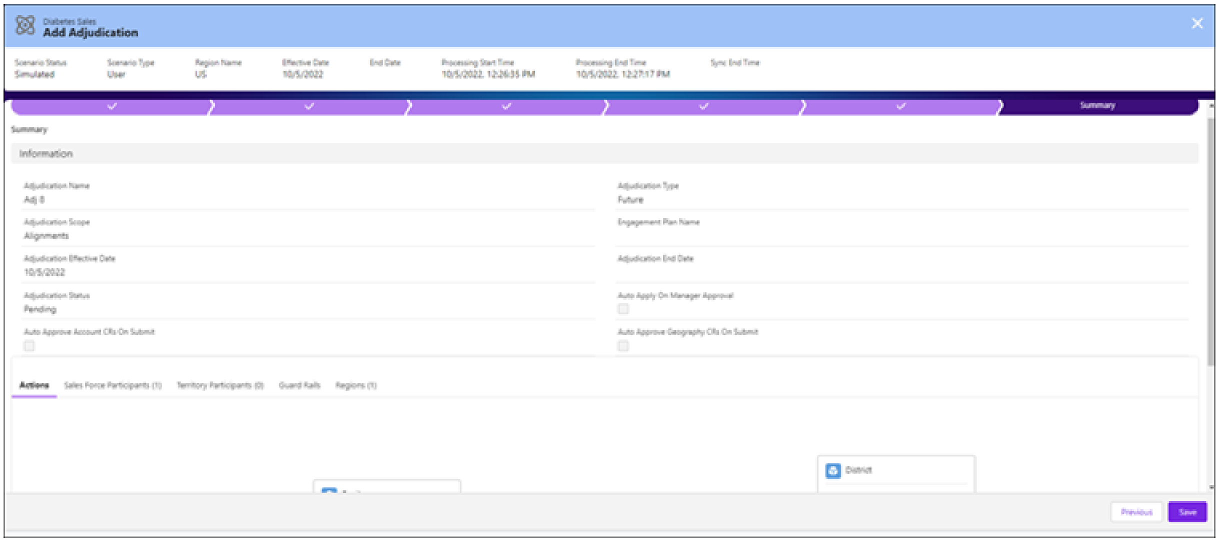
5. Select Participants, then click **Next**.



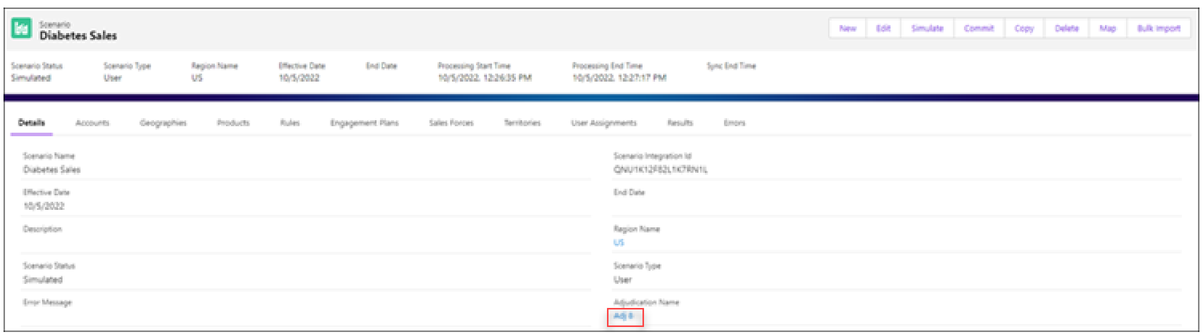
6. Select Regions, then click **Next**.



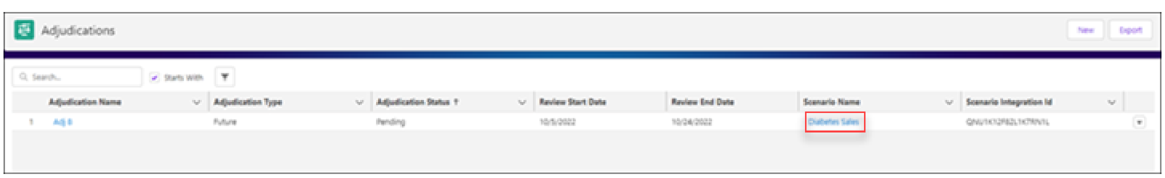
7. Review the information you added to the adjudication, then click **Save**.



The scenario is linked to the adjudication. To view adjudication information, click the name of the adjudication on the scenario's **Details** tab.



Additionally, from the **Adjudications** module, you can click the scenario name linked to a specific adjudication to view scenario information.

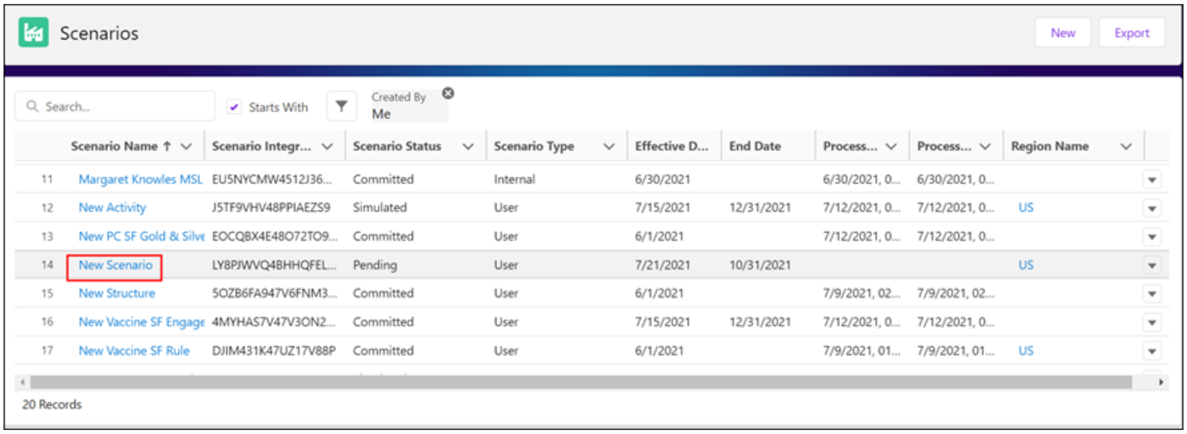


Copy an Engagement Plan in a Scenario

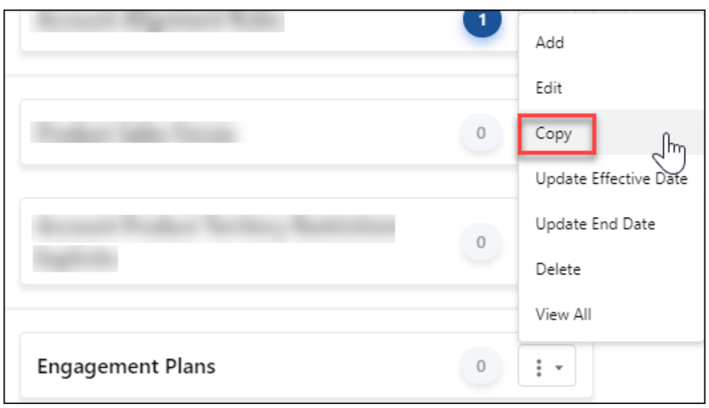
Use the engagement plan copy feature to quickly create a new engagement plan that is similar to an existing plan. You can copy engagement plans if the status of the scenario is *Pending* or *Simulated*.

To copy an engagement plan in a scenario

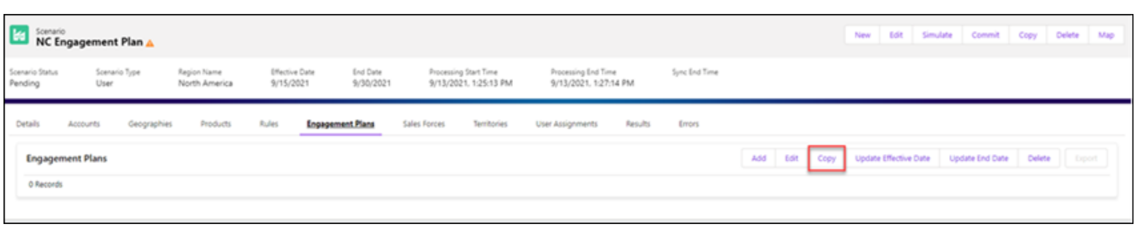
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the engagement plan you want to copy.



3. Do one of the following:
   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for **Engagement Plans**, then select **Copy**.

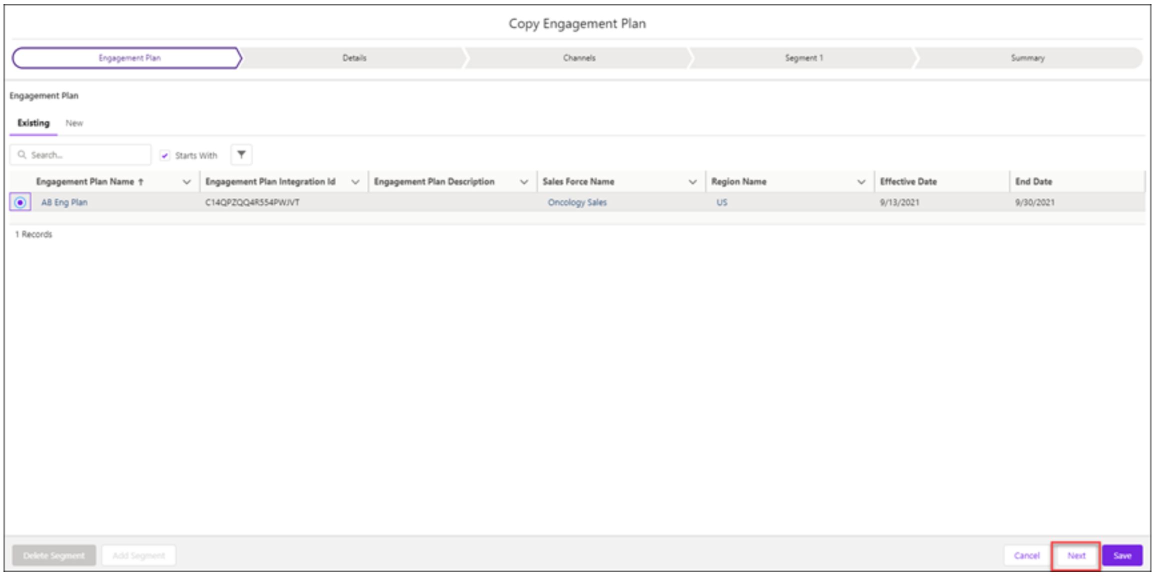
     

   - Select the **Engagement Plans** tab, then click **Copy**.

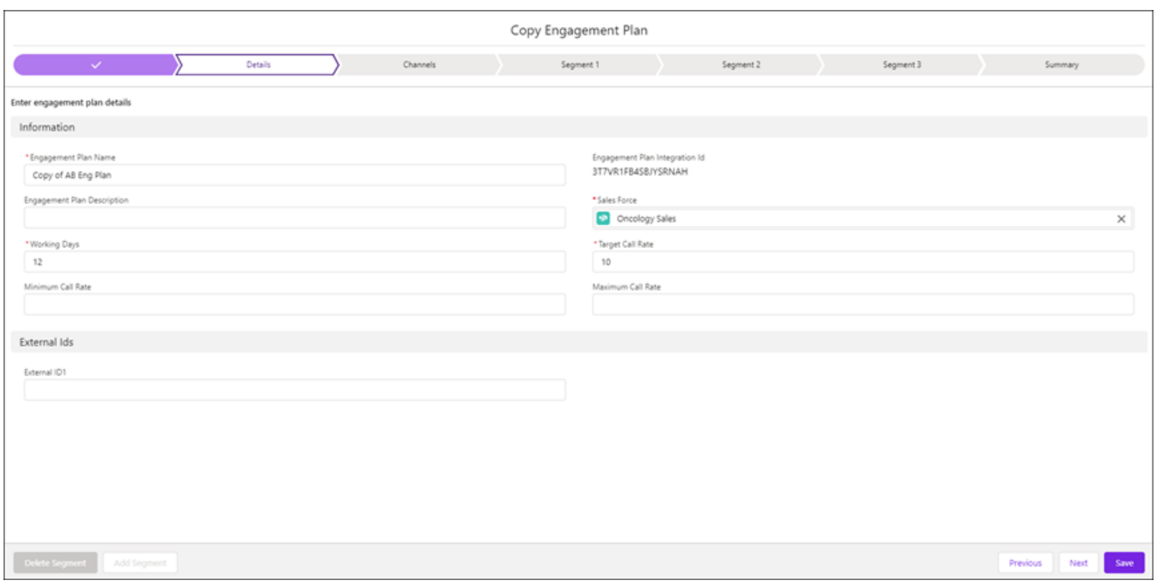
     

4. Select the check box next to the engagement plan you want to copy, then click **Next**.

> **Note:** The **Existing** tab contains all current engagement plans in the database, and the **New** tab contains the engagement plans that were just created in the current scenario.

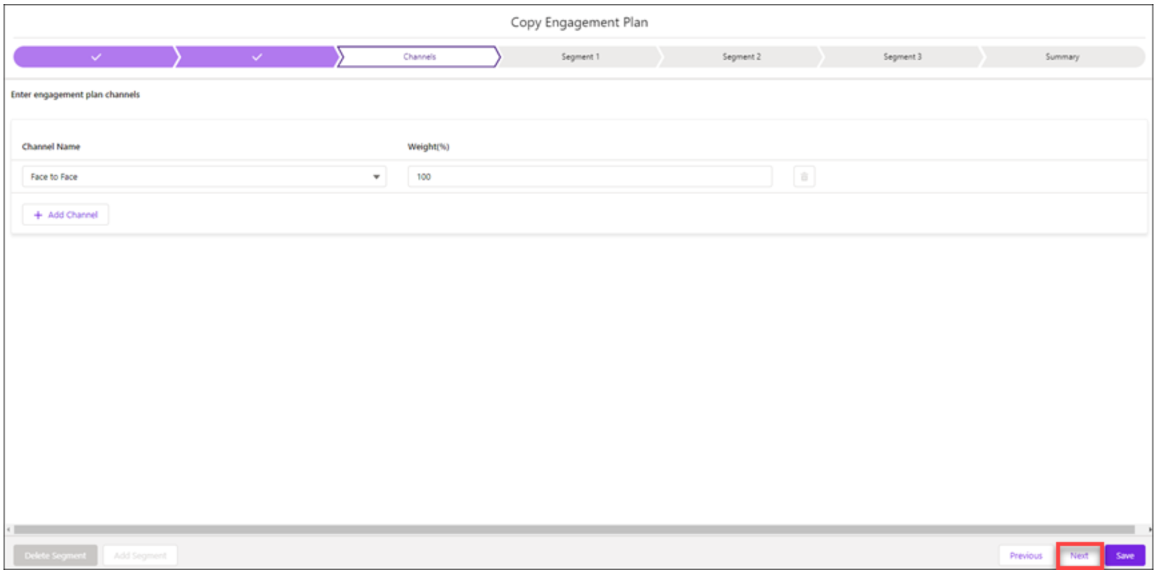


5. Enter the information details for the new engagement plan, then click **Next**.

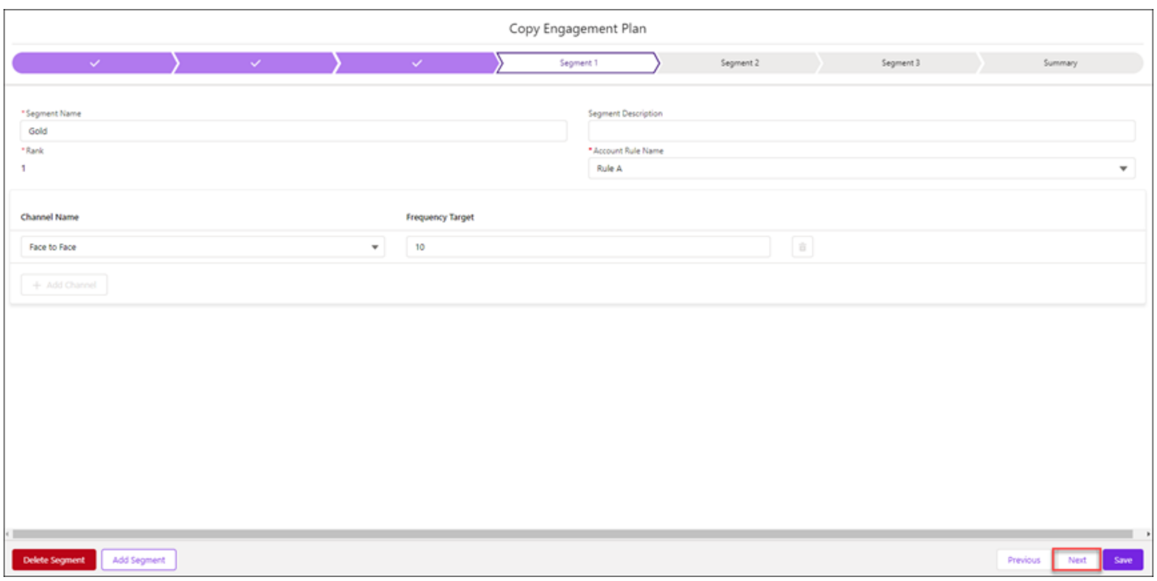


For information about engagement plan fields, see Add an Engagement Plan Transaction to a Scenario.

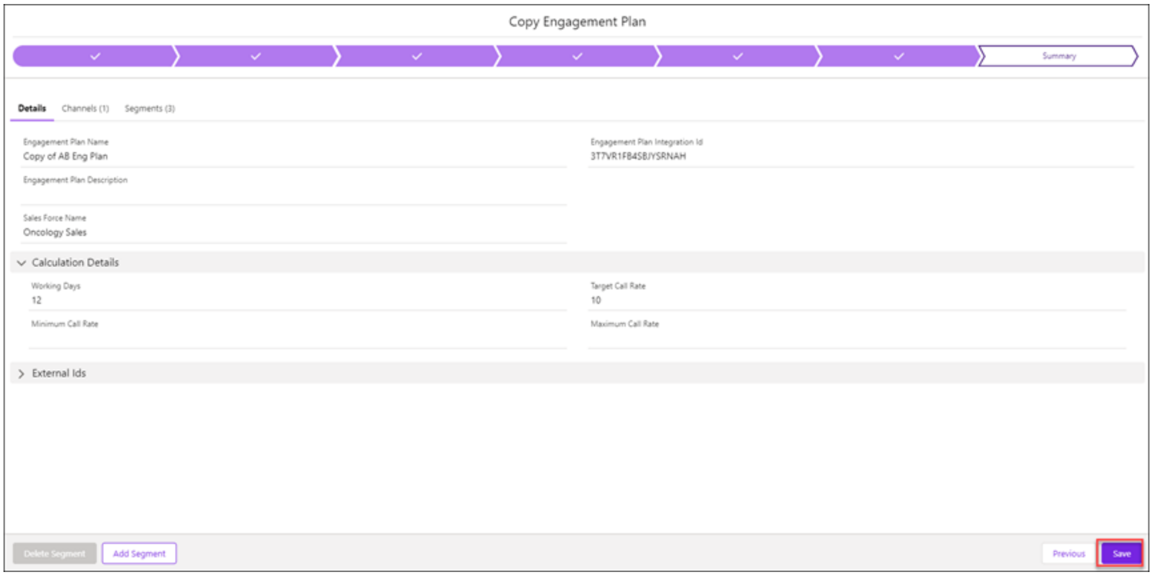
6. Enter channel information, then click **Next**.



7. Enter segment information, then click **Next**.



8. Review the **Details**, **Channels**, and **Segments** tabs of the Summary screen, then click **Save**. If you want to make changes, click **Previous** and make updates.

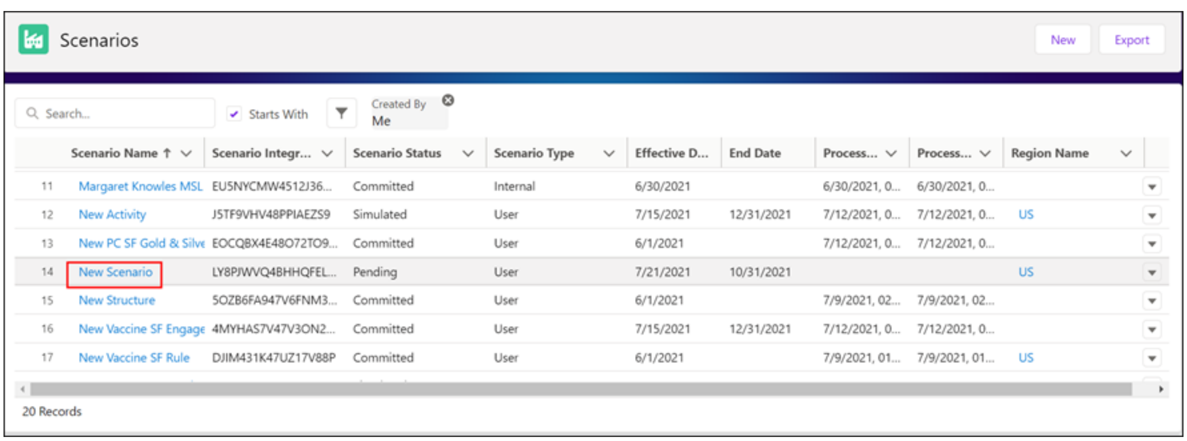


Move a Transaction from One Territory to Another

You can move Account, Geography, Product, or User Assignment transactions to a different territory if the status of the scenario is active/pending or simulated.

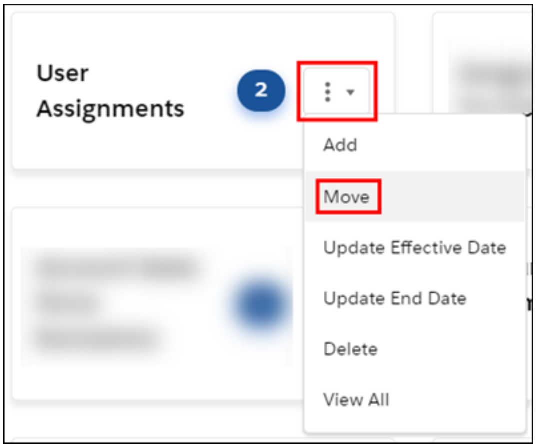
To move a transaction to a different territory

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to move to another territory.

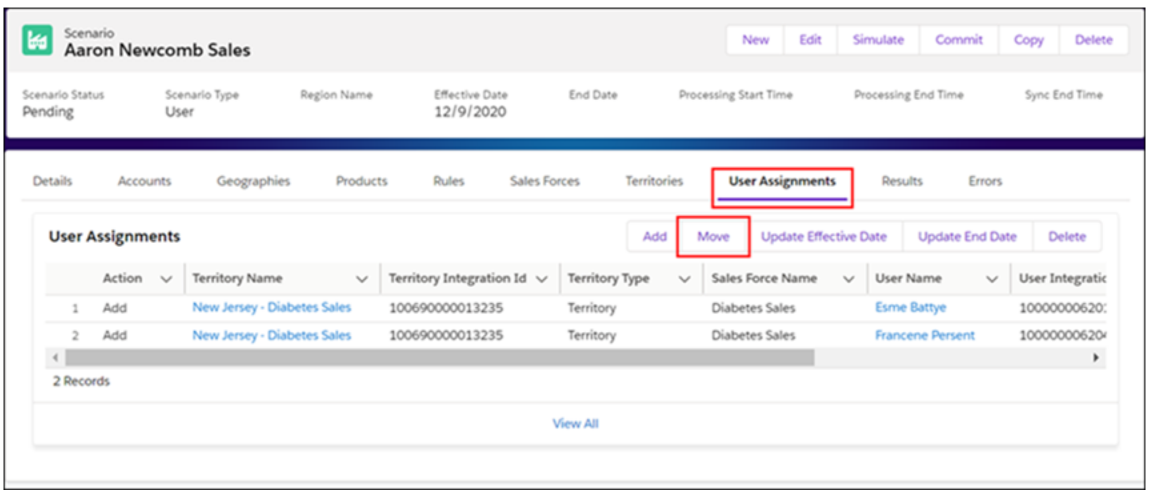


3. Do one of the following:

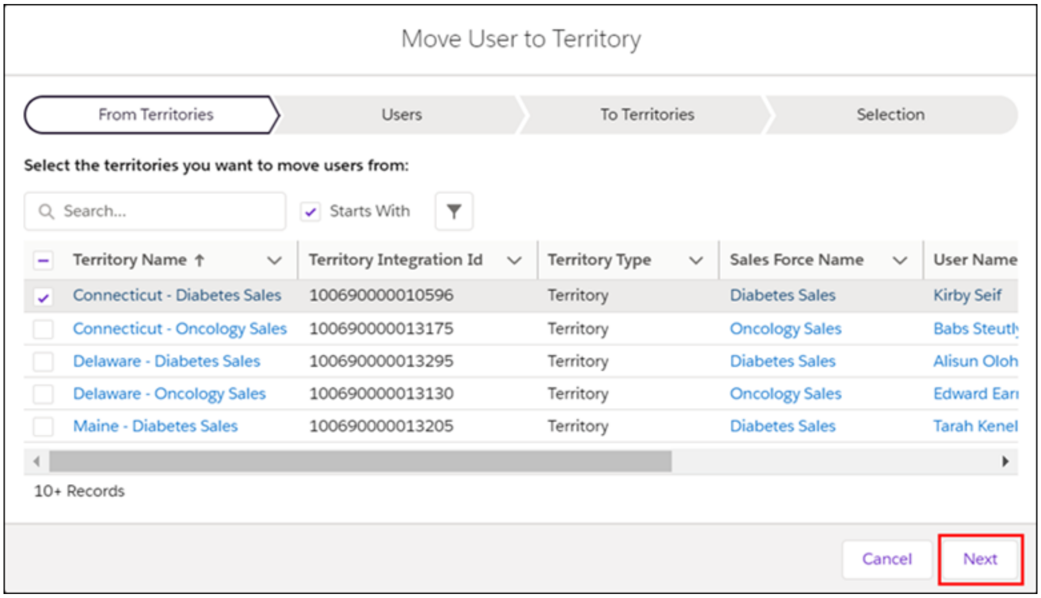
- From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction you want to move to a different territory, and then select **Move**.



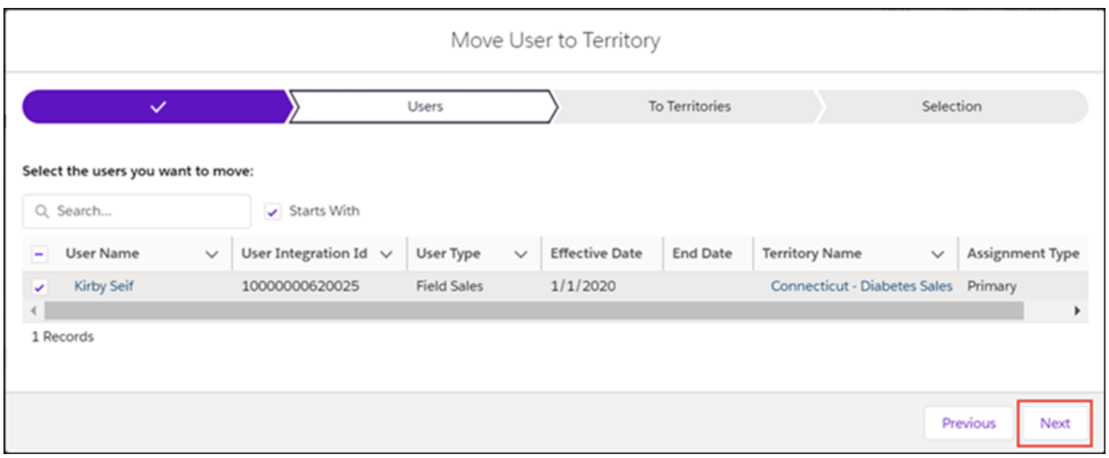
- Click the tab where the transaction you want to move to a different territory is located, and then select **Move** for the transaction.



4. Select the territory or territories you want to move geographies, accounts, products, or users from, and then click **Next**.

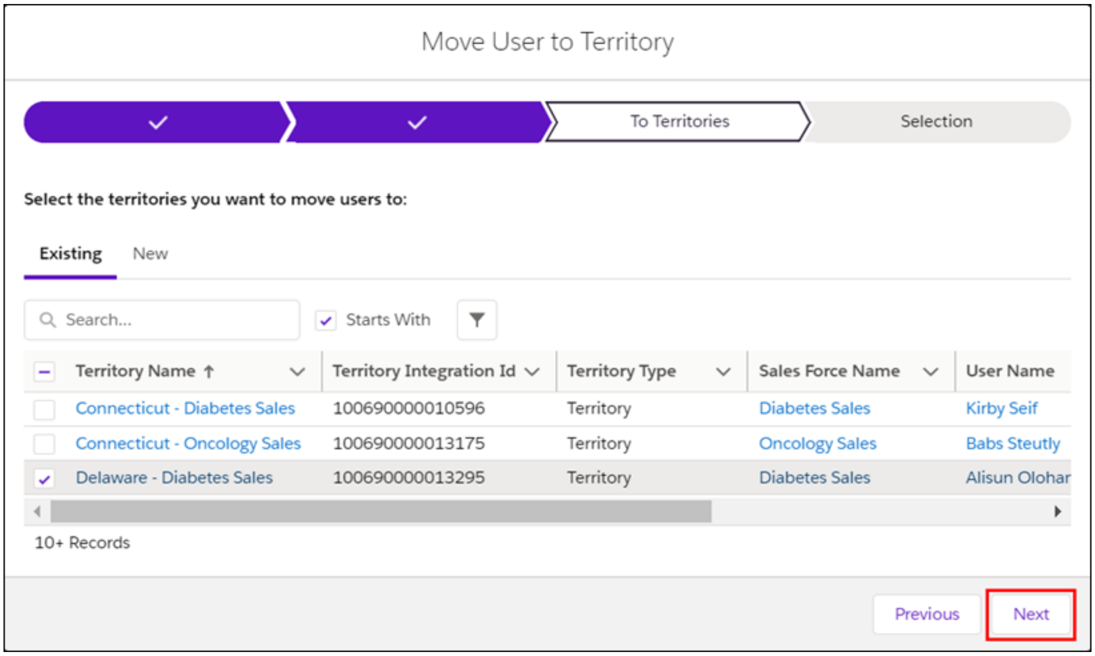


5. Select the geographies, accounts, products, or users you want to move, and then click **Next**.

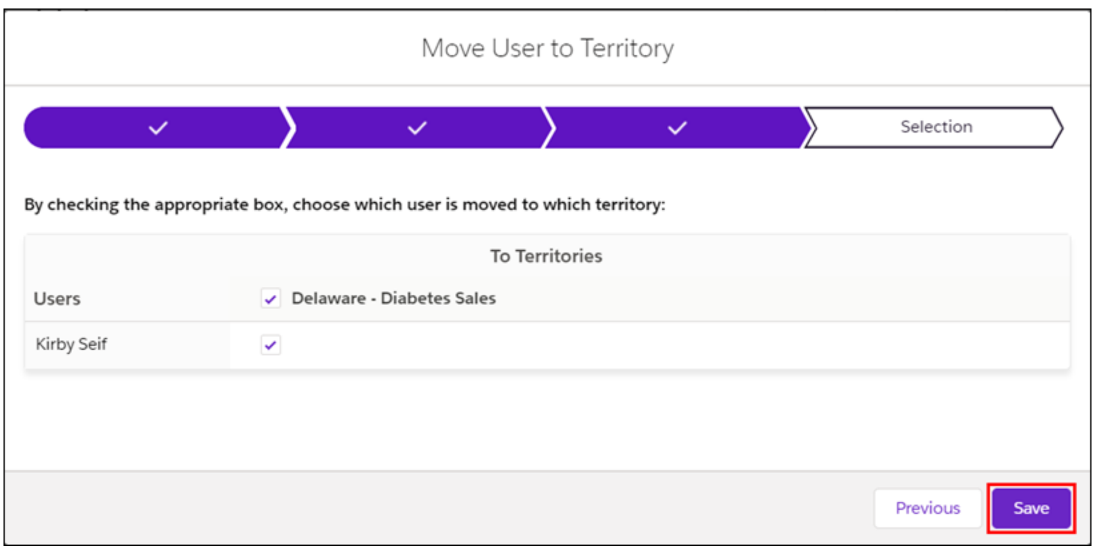


6. Select the territories you want to move the geographies, accounts, products, or users to, and then click **Next**.

> **Note:** The **Existing** tab contains all current territories in the database and the **New** tab contains territories that were just created in the current scenario.



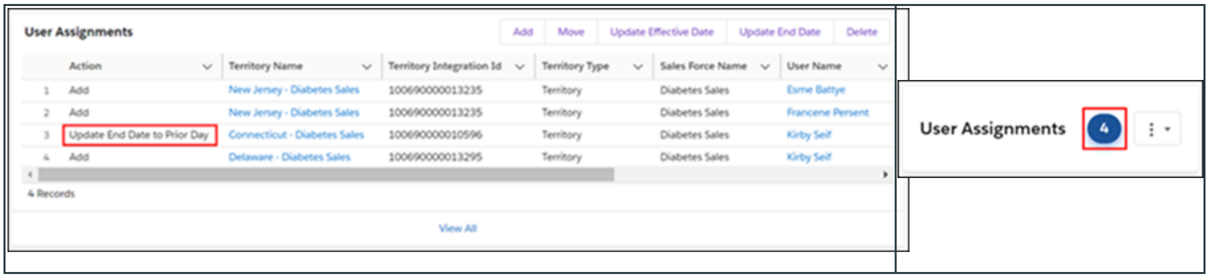
7. Choose which geography, account, product, or user is moving to which territory by selecting the appropriate check box for the geography, account, product, or user under the appropriate territory.



8. Click **Save**.

   The transaction is added to the appropriate section of the tab where the transaction is being moved from and is indicated on the transaction card in the **Overview** section of the **Details** tab.

The **Action** status of the moved transaction is *Update End Date to Prior Day* because when you move a transaction from one territory to another, the system end dates the transaction from the previous territory the day before the transaction's effective date in the new territory.



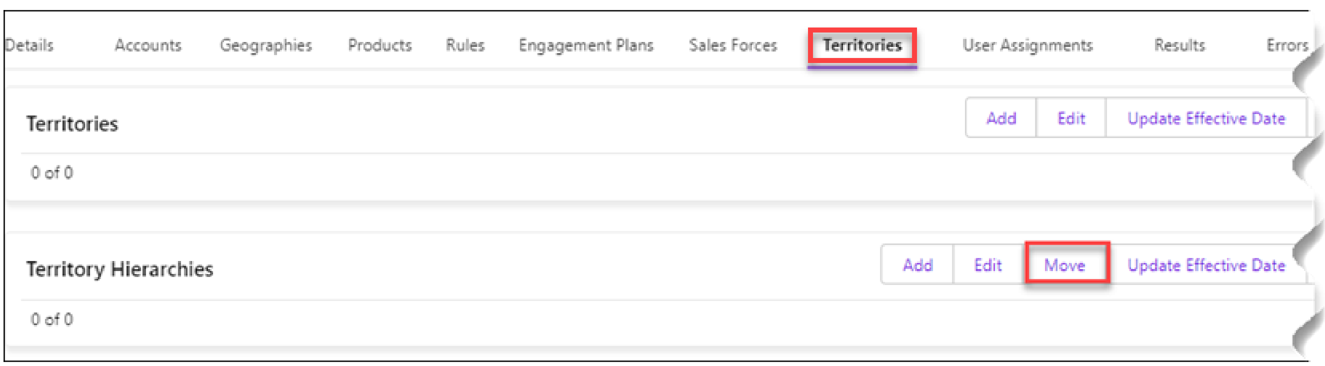
Move a Child Territory from One Parent to Another

A user can move a child territory from one parent to another in **Scenarios** by using a **Move** step.

Tip: You can also do this by importing a csv file. See [Import Scenario Data Using CSV Files].

To move a child territory from one parent to another parent using a Move step

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the child territory you want to move, then click the **Territories** tab.
3. In the **Territories** section, click **Move**



4. The **From Child Territory** step displays a list of all child territories. Select the one that you want to move and click **Next**.
5. The **Territory Hierarchy** step displays all child territory and parent territory relations. Select a relation and click **Next**.

6. The **To Parent Territory** step displays parent territories. Select the parent territory that you want to move the child territory to, then click **Next**.

7. In the **Selection** step, click the box to select which child territory moves to which parent territory, then click **Save**.

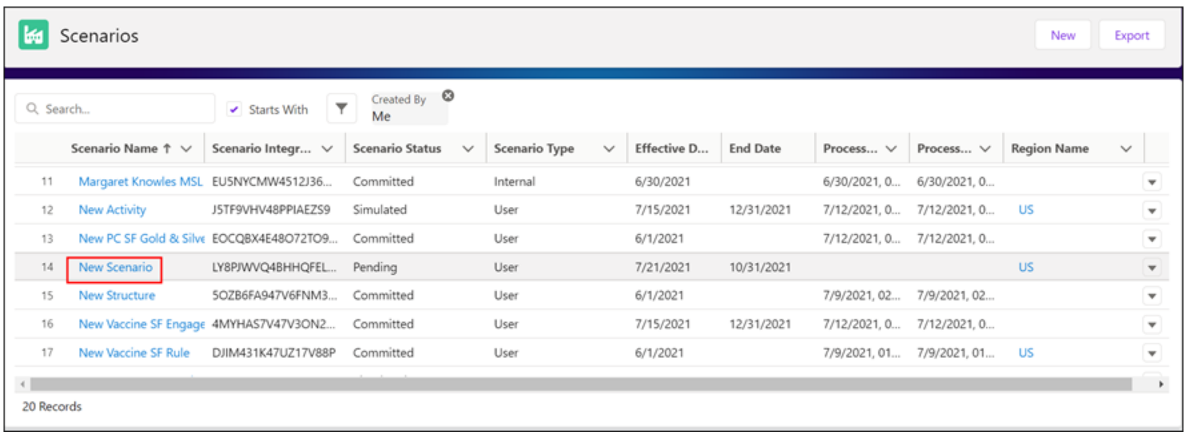
Delete a Transaction or Rule from a Scenario

You can delete transactions or rules from a scenario if the status of the scenario is pending or simulated.

To delete a transaction or rule from a scenario

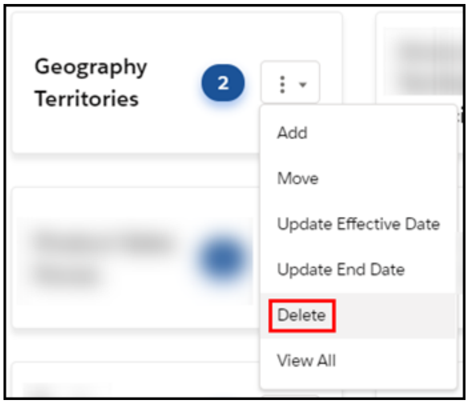
1. Click **Scenarios** from the primary navigation bar.

2. From the Scenarios screen, select the scenario that contains the transaction or rule you want to delete.

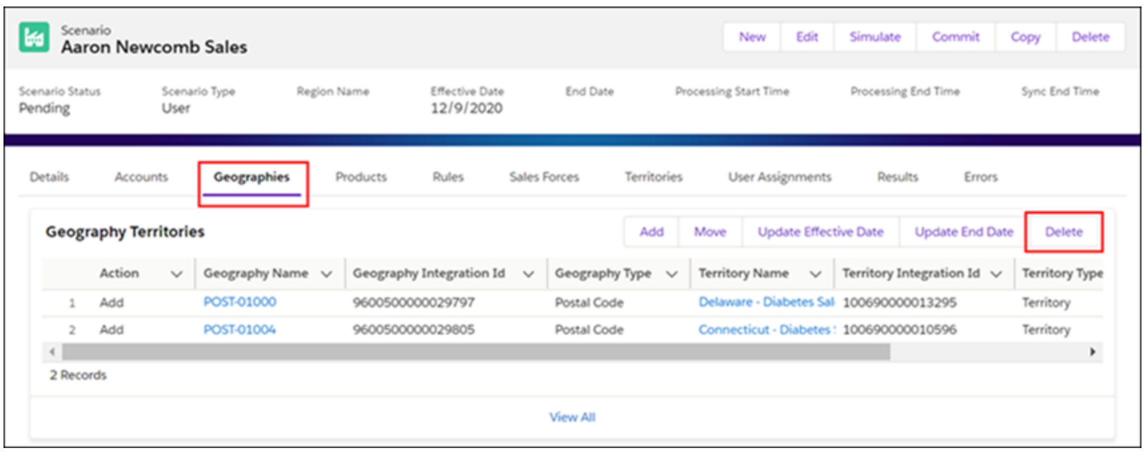


3. Do one of the following:

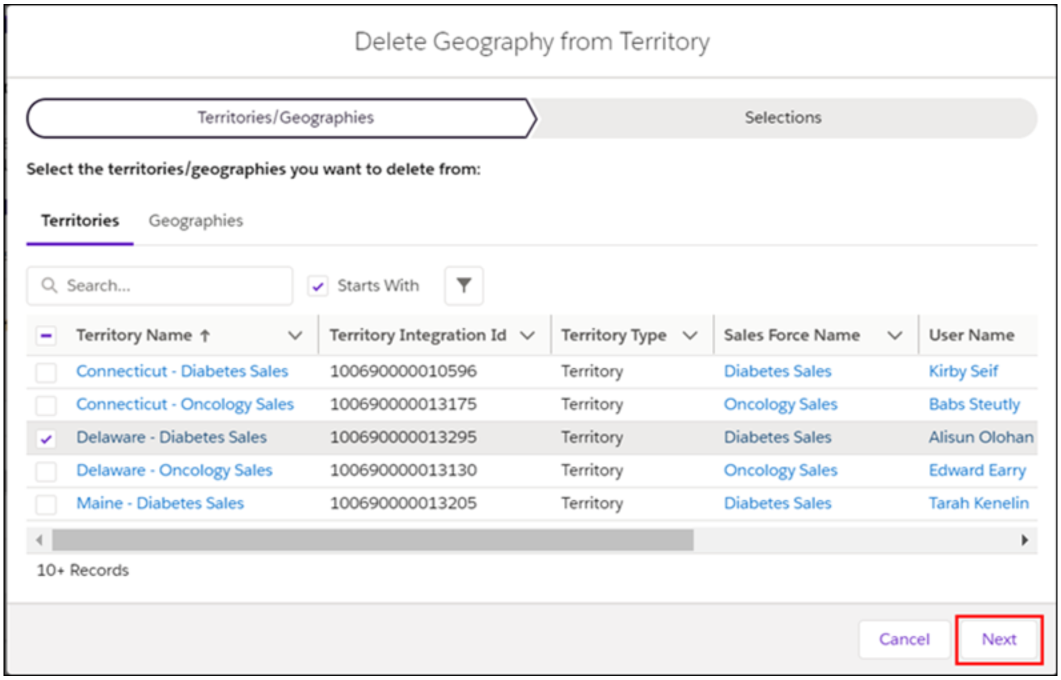
   - From the **Details** tab, scroll down to the **Overview** section, click the drop-down for the transaction or rule you want to delete, then select **Delete**.



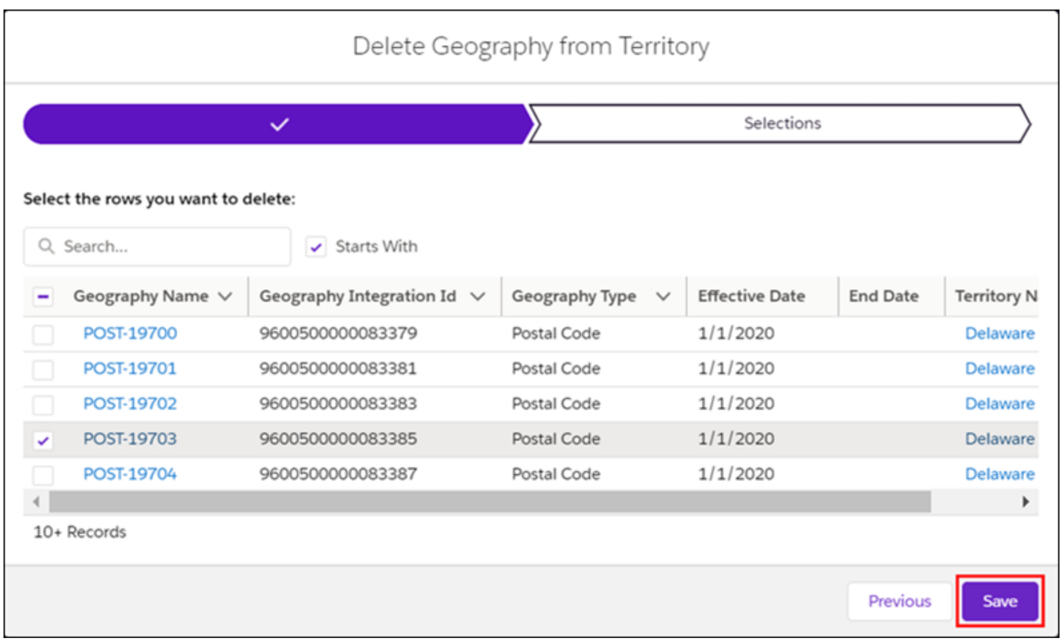
- Click the tab where the transaction you want to delete is located or click the **Rules** tab if you are deleting a rule, then click **Delete** for the transaction or rule.



4. Select the territories (or users, sales forces, engagement plans, etc.) from which you want to delete, then click **Next**.

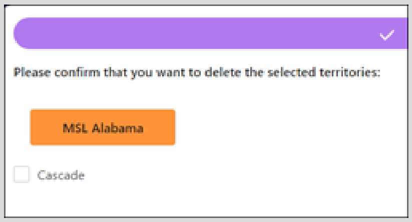


5. Select the geographies, accounts, products, engagement plans, etc. you want to delete, or the territories or sales forces, etc. from which you want to delete the selected territories, sales forces, rules, etc.

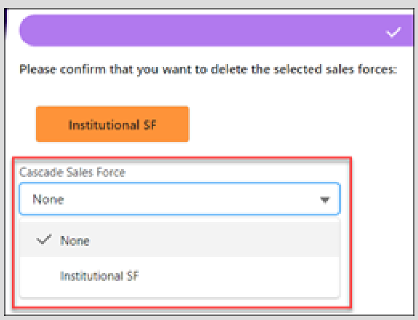


6. Click **Save**.

Note: For Territory transactions, select **Cascade** if you want to delete all related entities for the selected territories, such as account alignments, product alignments, geography alignments, or user alignments. Selecting **Cascade** will *not* delete the child territories or their related entities.



For Sales Force transactions, select a sales force from the **Cascade Sales Force** drop-down list to delete all of the underlying child records (such as territories, territory hierarchies, or account territory alignments).



The transaction or rule is removed from the scenario.

Simulate a Scenario

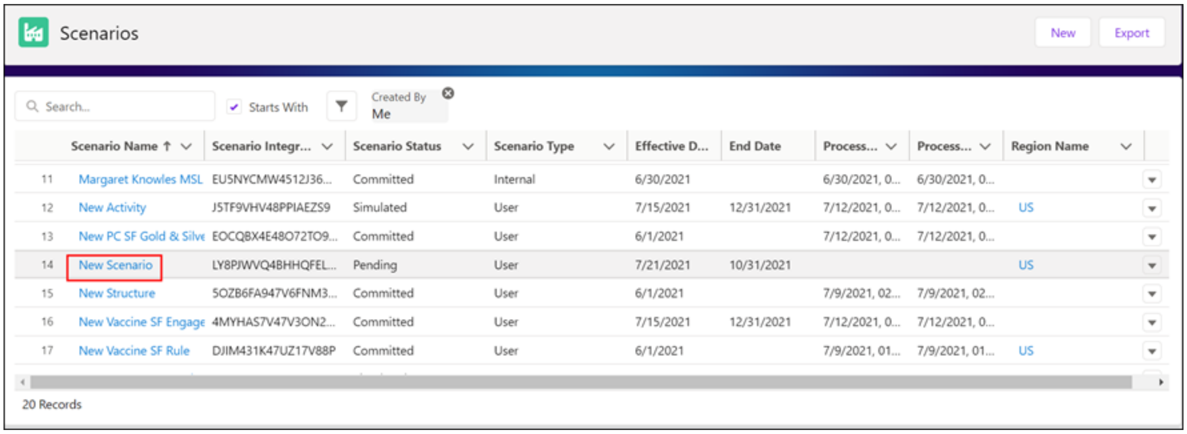
You can review the results of the scenario before submitting it using the Simulation process. Through this process, the Alignment engine evaluates the results of the rules and content of the scenario and provides results for you to perform what-if analysis. Using what-if analysis helps you better understand the dynamics of a scenario and the impacts of your choices.

The Simulation cycle includes various iterations of edit-simulate for the same scenario calculated in the production environment against production data prior to submitting the scenario.

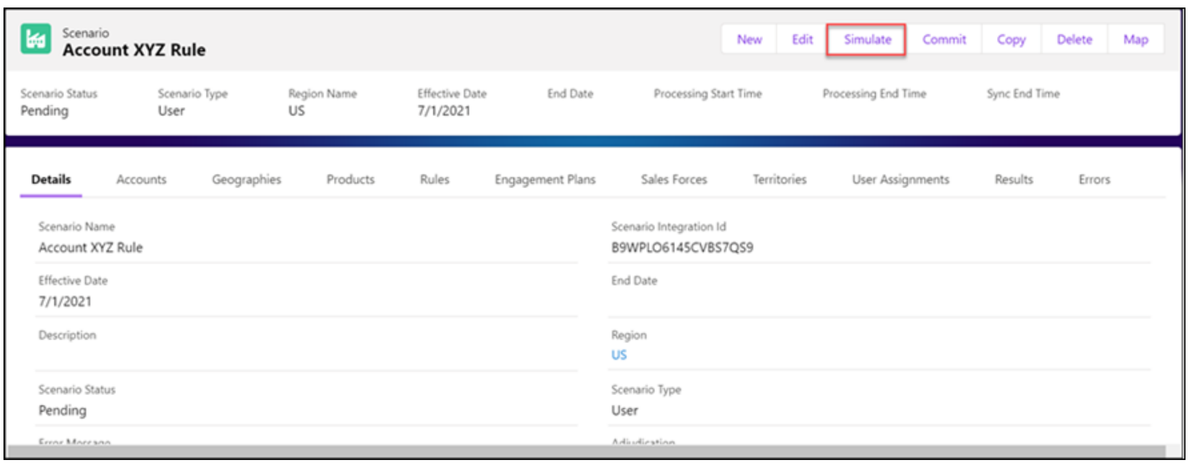
Important: Simulating the scenario is optional. If you are confident that the scenario you created is accurate, you can commit it without simulating. See Commit a Scenario.

To simulate a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to simulate.

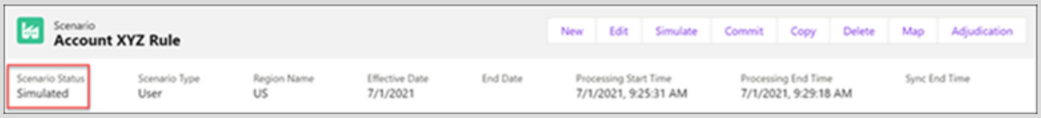


3. Click **Simulate**.



The **Scenario Status** changes to *Simulating*.

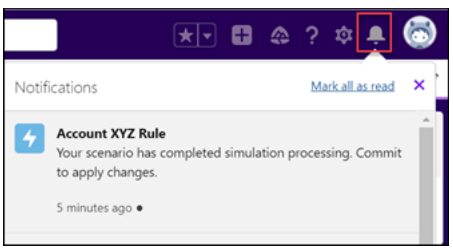
Note: The simulation process can take several minutes to complete. After the process completes, the **Scenario Status** changes to *Simulated* and you receive a notification that your scenario has completed simulation processing.

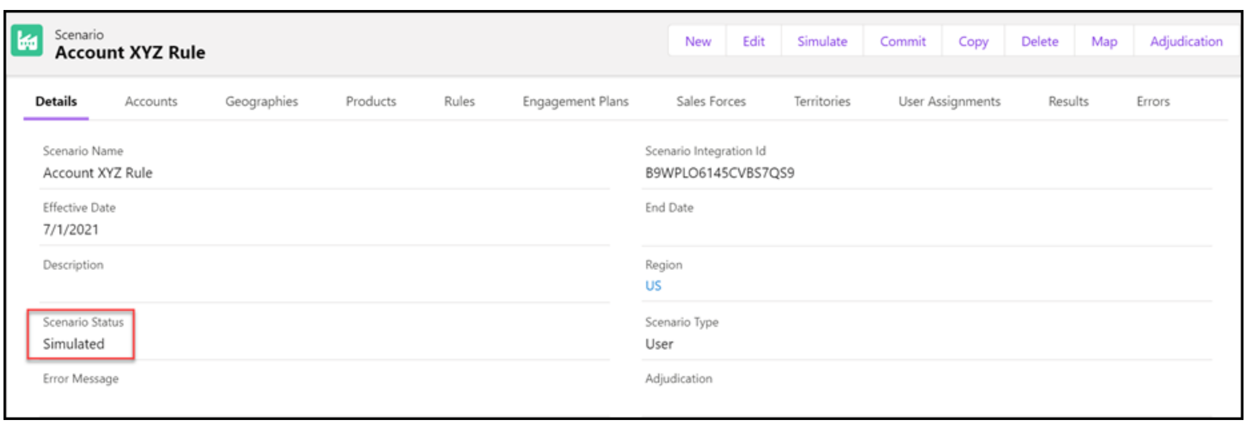


If the **Scenario Status** changes to *Error*, see Fix Scenario Errors.

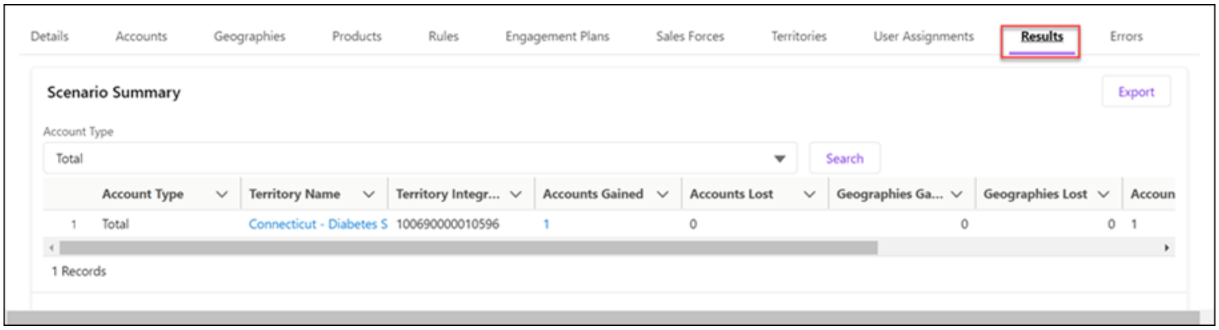
Note: If a scenario simulation fails, previous simulation results and errors are still present and can be accessed when resimulating the scenario.

4. Click **Notifications** and select the message to go to the **Details** tab where you can verify the status of the scenario.





5. Click the **Results** tab to view details of the simulation.



> **Note:** When you simulate a scenario that is linked to an adjudication, any submitted Change Requests display on the **Results** tab.

If you want to make changes to the scenario, edit the scenario and transactions and then click **Simulate**. You can make updates to the scenario as many times as you want before you commit it. When you are done making edits, commit your scenario. See Commit a Scenario.

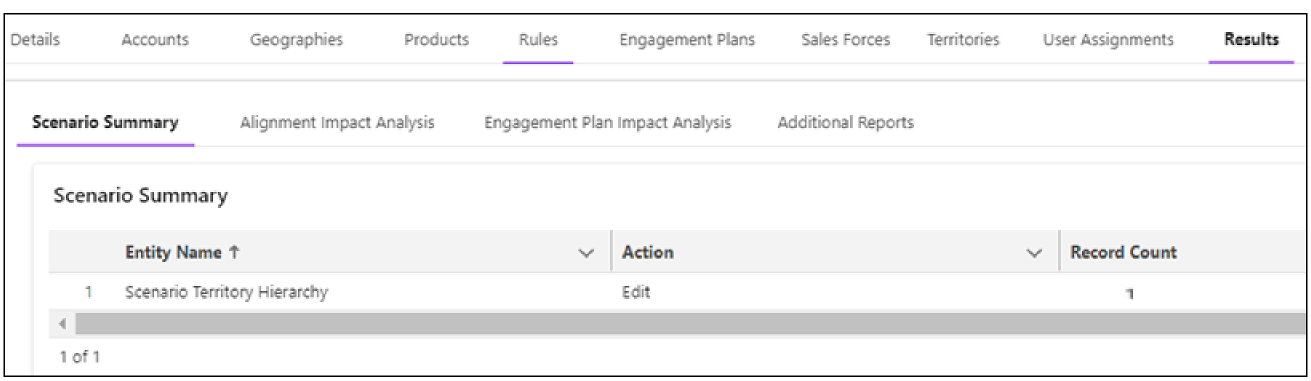
View Scenario Results

The **Results** tab displays the territory level impact analysis of the account or geography change for the affected territories, as well as engagement plan impact, if applicable. Results display only for simulated and committed scenarios.

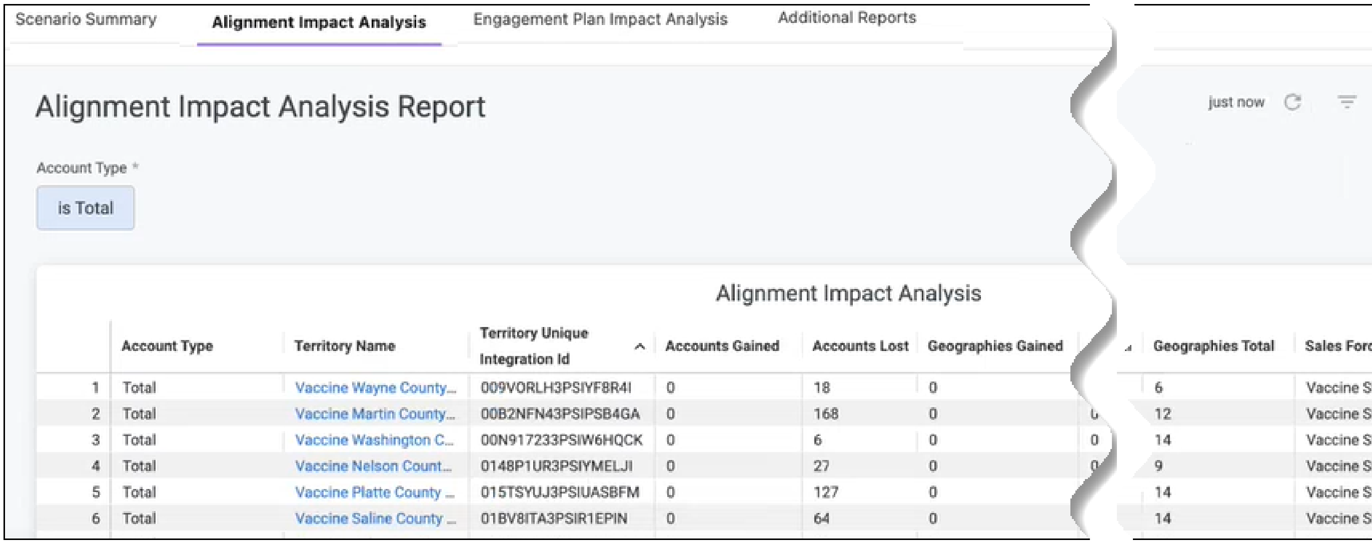
> **Note:** Transactions such as User Assignments that don't cause any account or geography impact to territories are not displayed in the **Results** tab.

To view scenario results

1. Click the **Results** tab of the scenario. The Scenario Summary tab contains the name of the scenario entity, the action, and the record count.

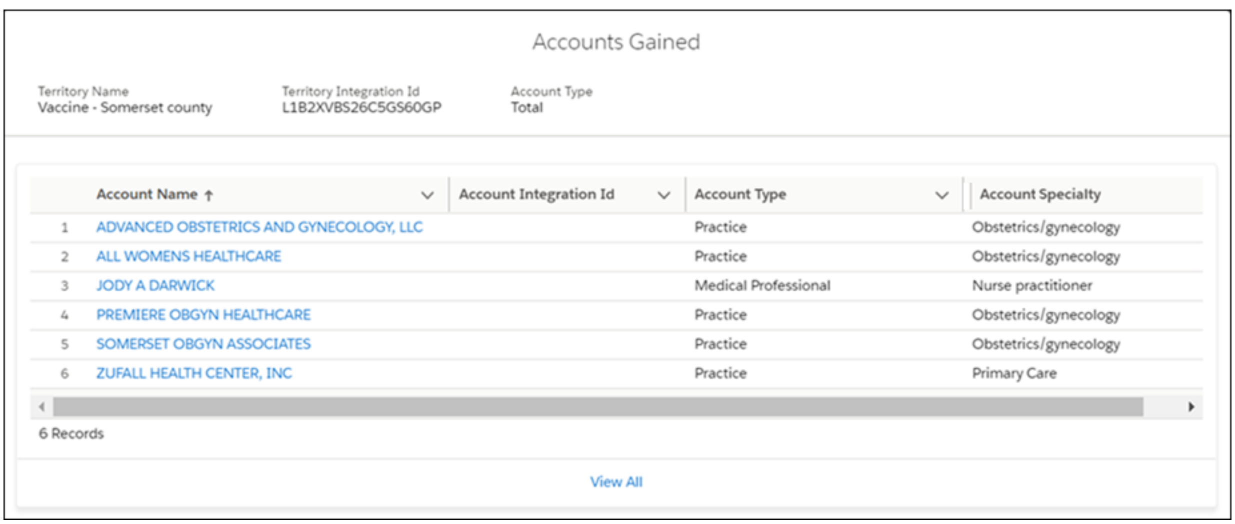


2. Select the **Alignment Impact Analysis** tab to view details of the accounts gained, lost, or total accounts.

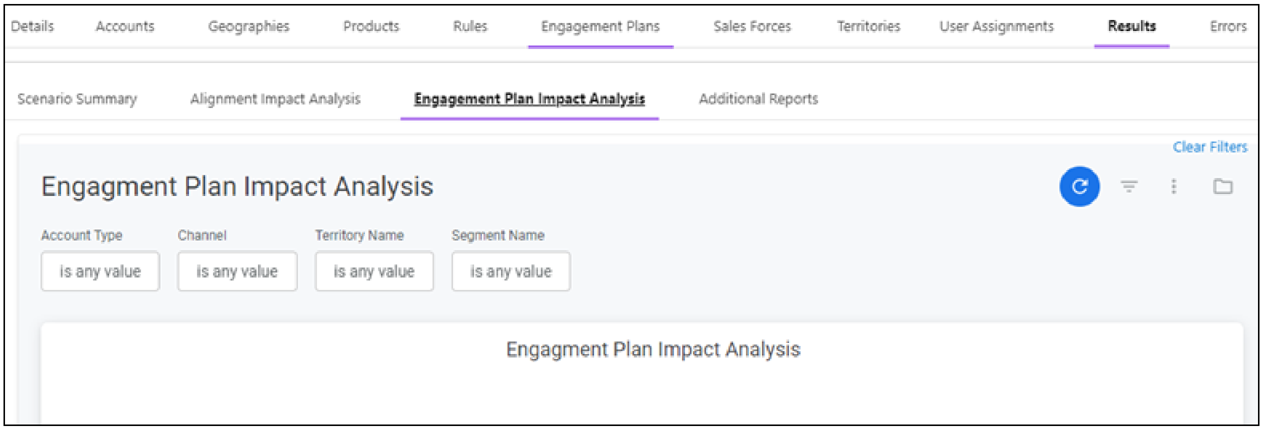


The Accounts Gained, Accounts Lost, or Account Alignments (Accounts Total) window displays details of each account.

Tip: Click an **Account Name** to view the account information.



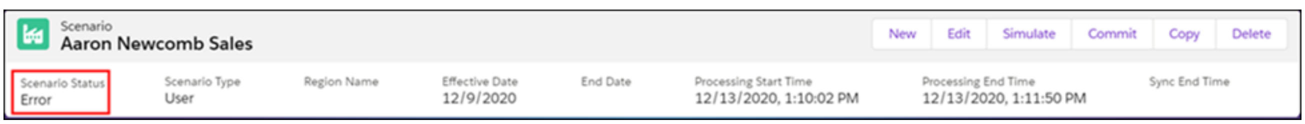
3. Select the **Engagement Plan Impact Analysis** tab to view details of the engagement plan associated with the scenario, if any.



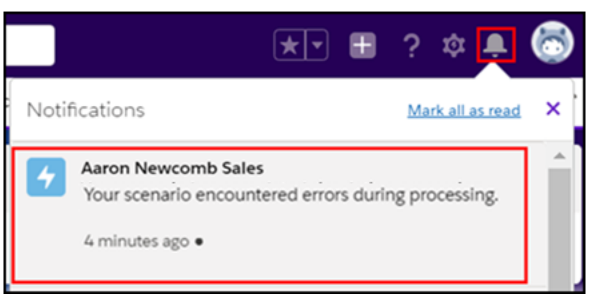
Note:	Use the **Search** and **Filters** functions to help you filter results. See [Search and Filter Functions]().

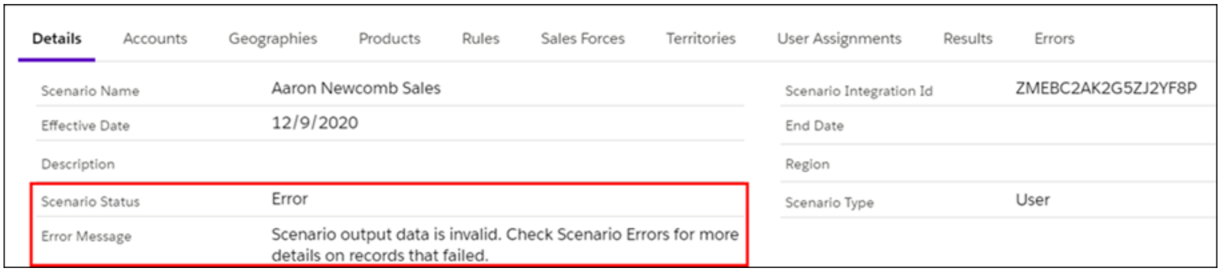
Fix Scenario Errors

If there are problems with your scenario, the **Scenario Status** changes to *Error* and an error message is displayed in the **Notifications** drop-down.

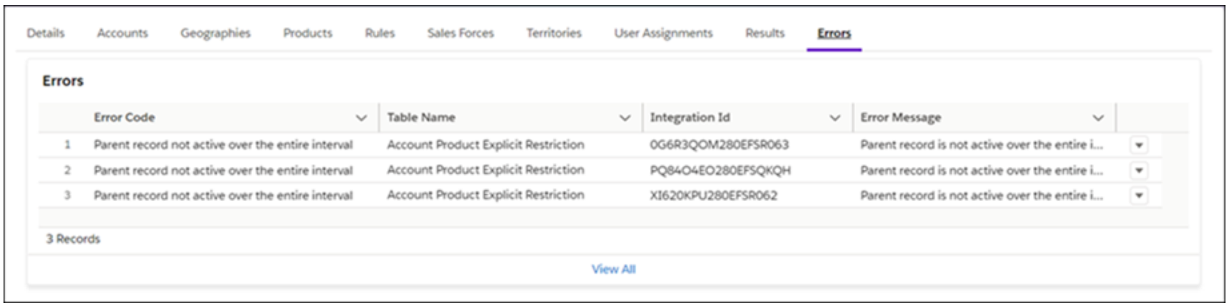


1. Click **Notifications** and select the error message to go to the **Details** tab where you can view a description of the error.





2. Click the **Errors** tab to view the details of what needs to be fixed.



3. Update your scenario and click **Simulate** to go through the process again.

Commit a Scenario

If you have reviewed the results of the scenario simulation and are pleased with the results, you can commit the scenario. If the scenario is linked to an adjudication, the adjudication must be closed before you can commit the scenario.

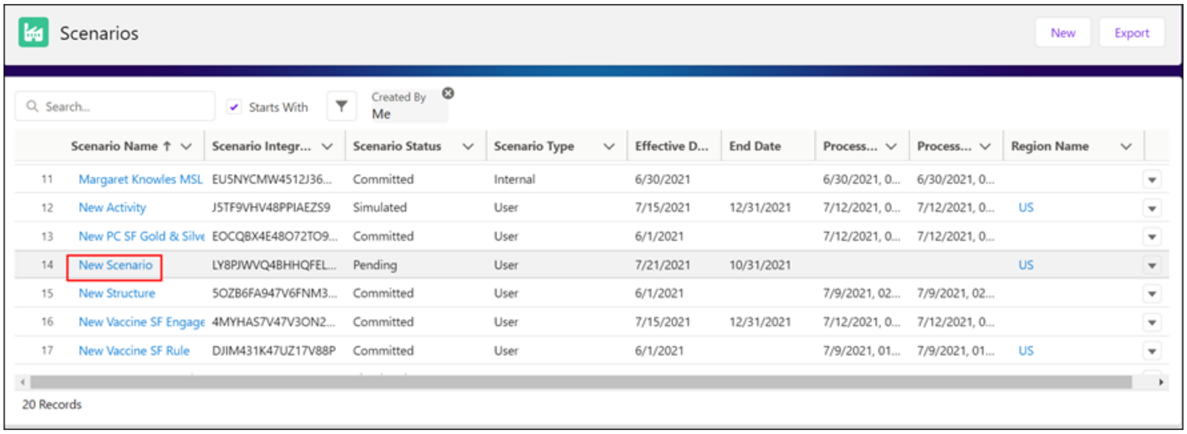
Note: Simulating a scenario before committing it is optional. If you skip the simulation process, you may receive scenario errors. If this occurs, see Fix Scenario Errors.

Important: After a scenario is successfully committed, it cannot be edited or deleted.

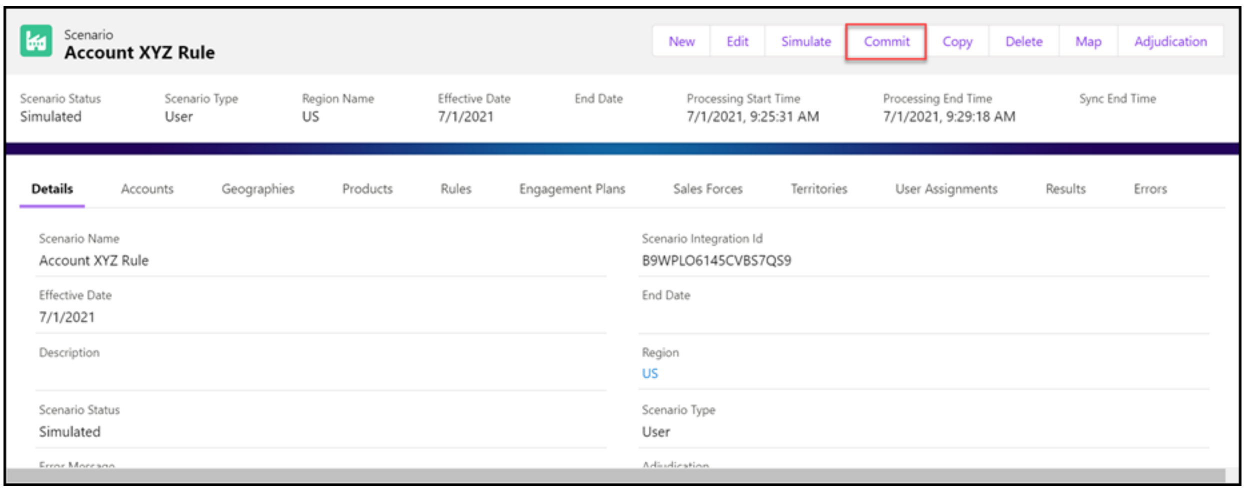
To commit a scenario

1. Click **Scenarios** from the primary navigation bar.

2. From the Scenarios screen, select the scenario you want to commit.



3. Click **Commit**.



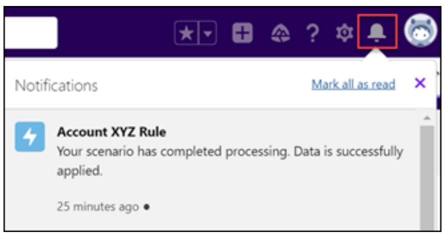
The **Scenario Status** changes to *Committing*.

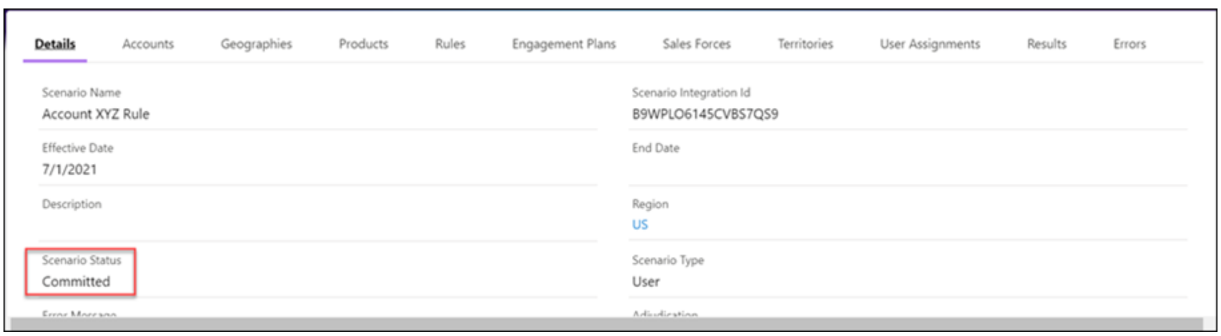
The **Scenario Status** changes to *Syncing*. During the Syncing process, Snowflake syncs with Sales Force. After syncing is complete, the data is available outside of the scenario.

Note: The committing and syncing process takes several minutes to complete. When it's complete, the **Scenario Status** changes to *Committed.* A notification indicates that your scenario has been committed.

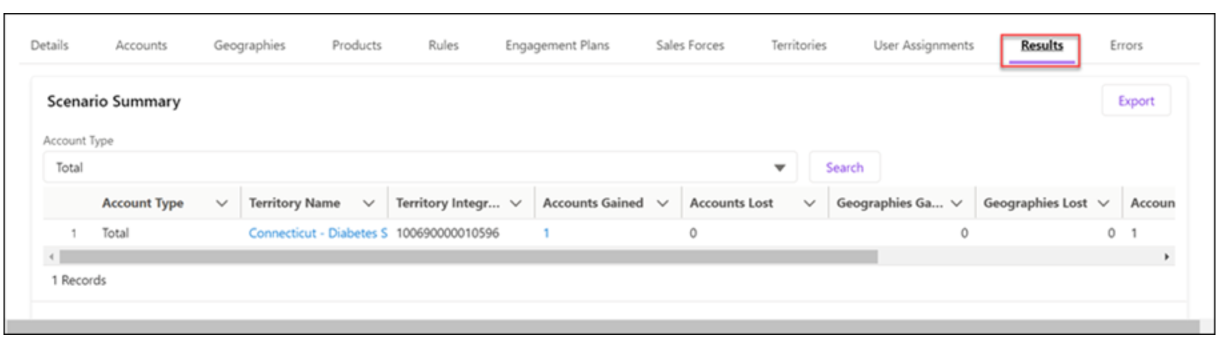
If the **Scenario Status** changes to *Error*, see [Fix Scenario Errors](#).

4. Click **Notifications** and select the message to go to the **Details** tab, where you can verify the status of the scenario.





5. Click the **Results** tab to view details of the scenario.



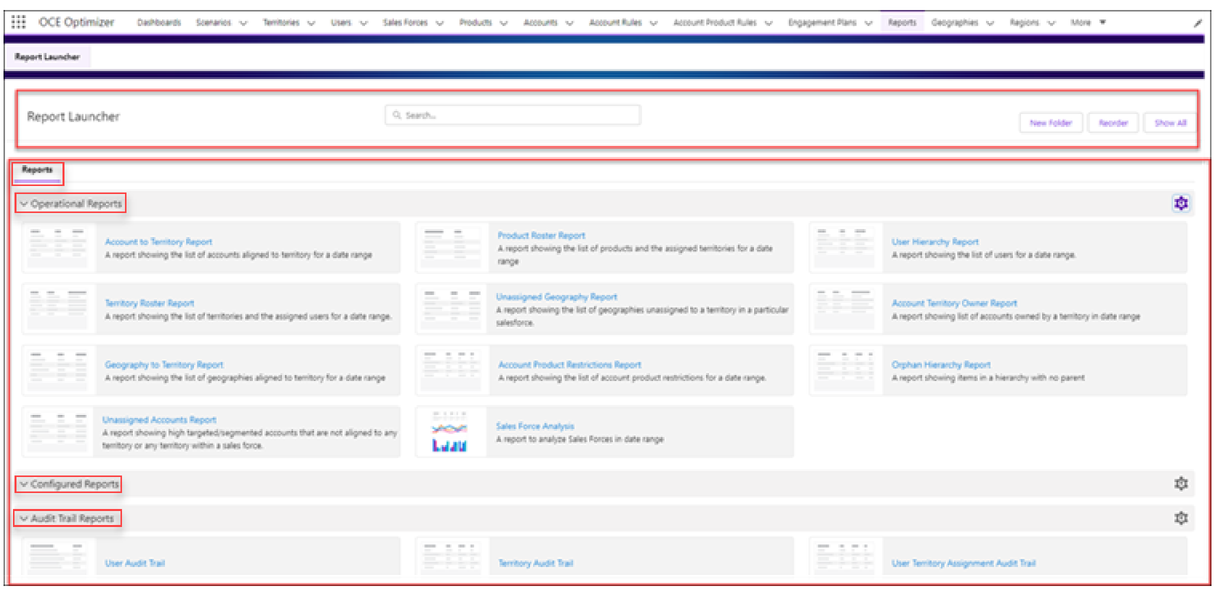
Reports

Using the Reports module, you can look up information within the application, as well as track changes that have been made to specific modules. All reports are created with the Google® Looker® platform, which provides advanced analytic reporting and client-specific configuration. Most reports are generated immediately, and the results appear directly within the application page. The results of all reports are in grid format or chart format, which can be exported to a CSV (comma-separated value) file or a PDF file.

Note: Effective and end dates for core modules (Accounts, Geographies, Products, Regions, etc.) are not included in the reports and are not available for configuration.

The **Reports** module's main screen is made up of two sections. The **Report Launcher** section lets you search for reports and configure how to access reports. The **Reports** tab contains three types of reports, including Operational Reports, Configured Reports, and Audit Trail Reports.

Note: Your system administrator can access information on configuring existing reports and creating and working with Configured reports in the latest version of the OCE Optimizer Configuration Technical Guide.



For information on Operational reports, see Operational Reports.

For information on Audit Trail reports, see Audit Trail Reports.

For information on exporting reports, see Export Report Results to CSV and Export Report Results to PDF .

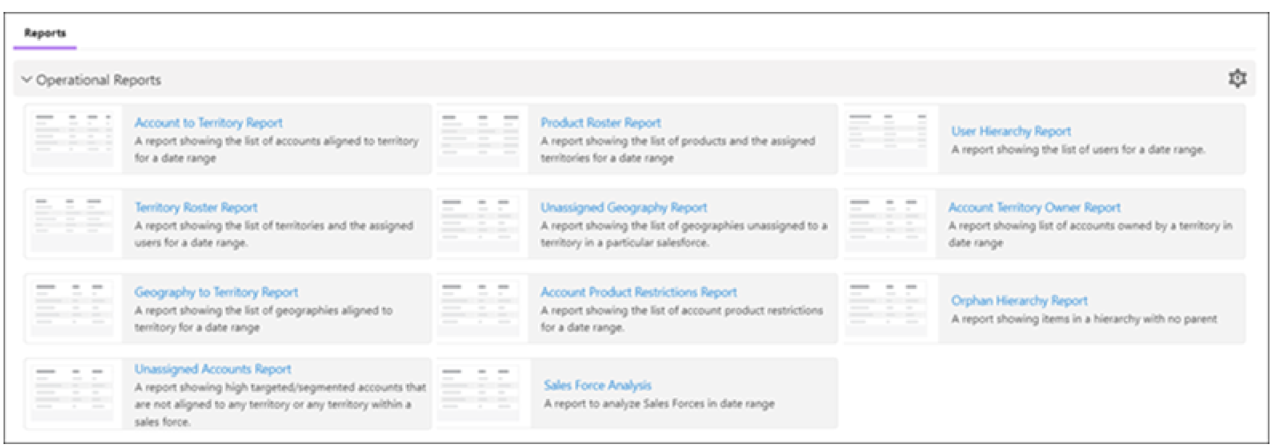
Looker Access

OCE Optimizer supports three levels of Looker access. These are managed in Salesforce **User** > **Permission Sets**.

Access Type	Salesforce Permission Set	User Abilities
Looker Execute access	Optimizer Enable Looker Reports	User can run the available reports but can't edit them. The user can also add a column and run the report with it, but he can't save the report.
Looker Explore access	Optimizer Enable Looker Report Configuration	User can run the available reports and edit them (using **Looker Edit** at the top of the OCE Optimizer screen). The user can also add a column, run the report with it, and save and share the changed report. but he can't save the report.
Looker Admin	Optimizer Enable Looker User Configuration	User has full Looker configuration and administration access, including access to the entire set of fields in Explore, as opposed to the subset that a Looker Explore user can see. This user has to have a Looker user account in the system

Operational Reports

Operational Reports display past, current, and future data over a range of dates. Access Operational Reports on the **Reports** tab from the **Reports** module.



For specific information on each Operational report, see:

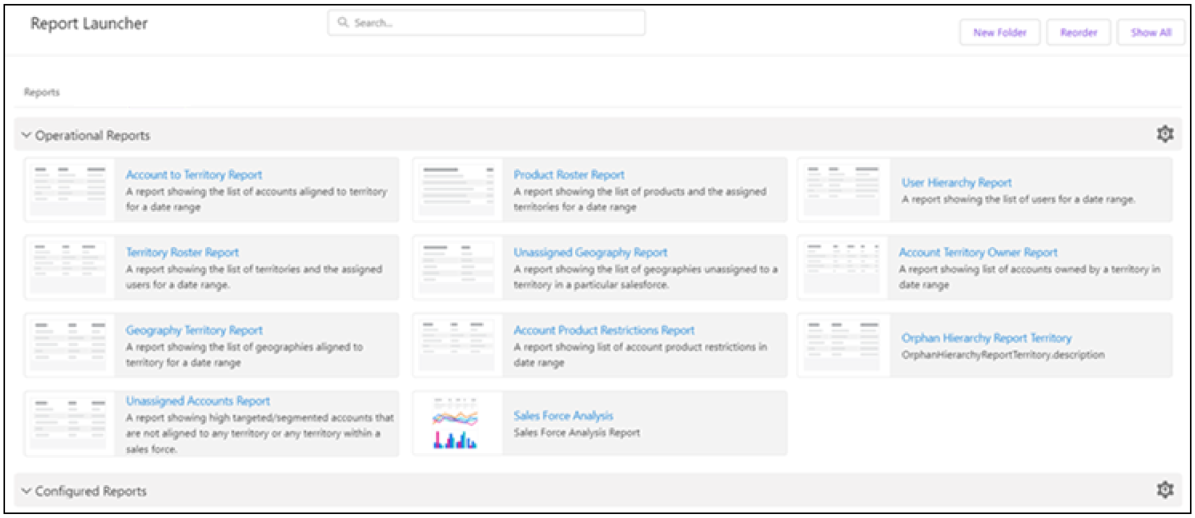
- View the Account to Territory Report
- View the Product Roster Report
- View the User Hierarchy Report
- View the Territory Roster Report
- View the Unassigned Geography Report
- View the Account Territory Owner Report
- View the Geography to Territory Report
- View the Account Product Restrictions Report
- View the Orphan Hierarchy Report
- View the Unassigned Accounts Report
- View the Sales Force Analysis Report

View the Account to Territory Report

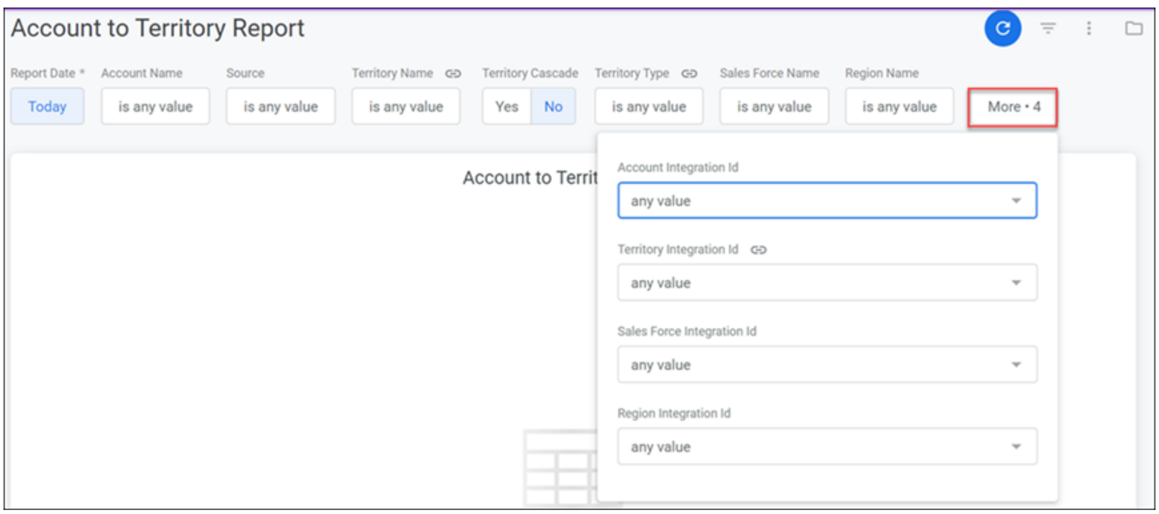
The Account to Territory report displays the list of accounts aligned to the territories. You can analyze data for past, current, and future dates.

To view the Account to Territory report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Operational Reports** section, click **Account to Territory Report**.



3. Click **More** to view all report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Account Name**: Enter an account name to quickly select an account from the results list, or click ▾ to scroll and select the account(s) to view.
- **Source**: Enter a source to quickly select a source from the results list, or click ▾ to scroll and select the source(es) to view.
- **Territory Name**: Enter a territory name to quickly select a territory from the results list, or click ▾ to scroll and select the territory/territories to view.

- **Territory Cascade**: Click **Yes** if you want the report to include underlying/child territories. Otherwise, click **No**.
- **Territory Type**: Enter a territory type to quickly select a type from the results list or click to scroll and select the territory type(s) to view.
- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click to scroll and select the sales force(es) to view.
- **Region Name**: Enter a region to quickly select a region from the results list, or click to scroll and select the region(s) to view.
- **Account Integration Id**: Enter an account integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view.
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view.

4. Click **Load** to view the report.

> **Note:** Both active and inactive accounts display.

Account to Territory Report

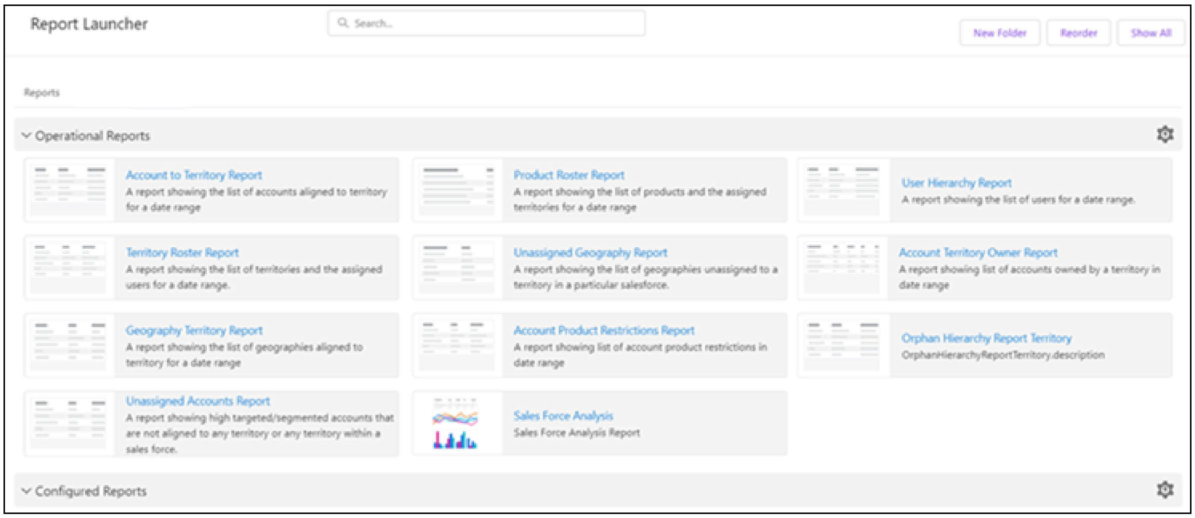
	Account Na	Account In...	Account Ty...	Account Sp...	Source	Reason	Territory N...	Territory In...	Account Te...	Account Te...	Sales Forc...	Sales Forc...
1	20 Mile Urg...	WUSE0020...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Do...	2971JELF3...	2021-06-01		Vaccine SF	GLW3PV8X...
2	20 Mile Urg...	WUSE0020...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Je...	1CNUOSL0...	2021-06-01		Vaccine SF	GLW3PV8X...
3	1st Choice ...	WUSE0010...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Cl...	2Z6NW69X...	2021-06-01		Vaccine SF	GLW3PV8X...
4	1st Choice ...	WUSE0010...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Gr...	IINPDMRN...	2021-06-01		Vaccine SF	GLW3PV8X...
5	1st Choice ...	WUSE0010...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Be...	2T07WZYT...	2021-06-01		Vaccine SF	GLW3PV8X...
6	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine W...	KHKATOF7...	2021-06-01		Vaccine SF	GLW3PV8X...
7	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Mi...	LB032KAE...	2021-06-01		Vaccine SF	GLW3PV8X...
8	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Da...	F7AO7TKS...	2021-06-01		Vaccine SF	GLW3PV8X...
9	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine St...	DI16DRRR...	2021-06-01		Vaccine SF	GLW3PV8X...
10	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Oc...	0CTNI5CQ...	2021-06-01		Vaccine SF	GLW3PV8X...
11	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Li...	05R6V6E9...	2021-06-01		Vaccine SF	GLW3PV8X...
12	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Sa...	LNHEEAV6...	2021-06-01		Vaccine SF	GLW3PV8X...
13	165 Summit...	WUSE0011...	Practice	Internal me...	Dynamic	Vaccine SF...	Vaccine Be...	U5ZKJJ6D...	2021-06-01		Vaccine SF	GLW3PV8X...
14	14th Medic...	WUSE0020...	Practice	Family me...	Dynamic	Vaccine SF...	Vaccine M...	1MSXZ15L...	2021-06-01		Vaccine SF	GLW3PV8X...
15	14th Medic...	WUSE0020...	Practice	Family me...	Dynamic	Vaccine SF...	Vaccine Lo...	O4V3XMB...	2021-06-01		Vaccine SF	GLW3PV8X...

View the Product Roster Report

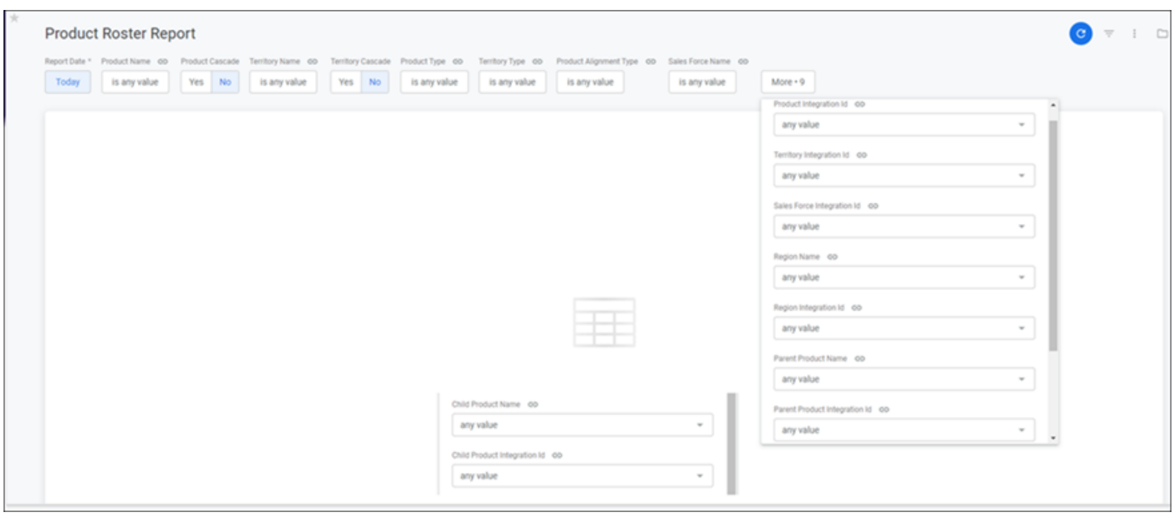
The Product Roster report displays a list of products and their alignment type that match selected criteria. You can analyze data for past, current, and future dates.

To view the Product Roster report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Operational Reports** section, click **Product Roster Report**.



3. Click **More** to view all report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Product Name**: Enter a product name to quickly select a product from the results list, or click ▾ to scroll and select the product (s) to view on the report.
- **Product Cascade**: Click **Yes** if you want the report to include underlying/child products. Otherwise, click **No**.
- **Territory Name**: Enter a territory name to quickly select a territory from the results list, or click ▾ to scroll and select the territory/territories to view on the report.
- **Territory Cascade**: Click **Yes** if you want the report to include underlying/child territories. Otherwise, click **No**.
- **Product Type**: Enter a product type to quickly select a type from the results list, or click ▾ to scroll and select the product type(s) to view on the report.
- **Territory Type**: Enter a territory type to quickly select a type from the results list, or click ▾ to scroll and select the territory type(s) to view on the report.
- **Product Alignment Type**: Enter a product alignment type to quickly select an alignment type from the results list, or click ▾ to scroll and select the product alignment type(s) to view on the report.
- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click ▾ to scroll and select the sales force(es) to view on the report.
- **Product Integration Id**: Enter a product integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.
- **Region Name**: Enter a region name to quickly select a region from the results list, or click ▾ to scroll and select the region(s) to view on the report.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.

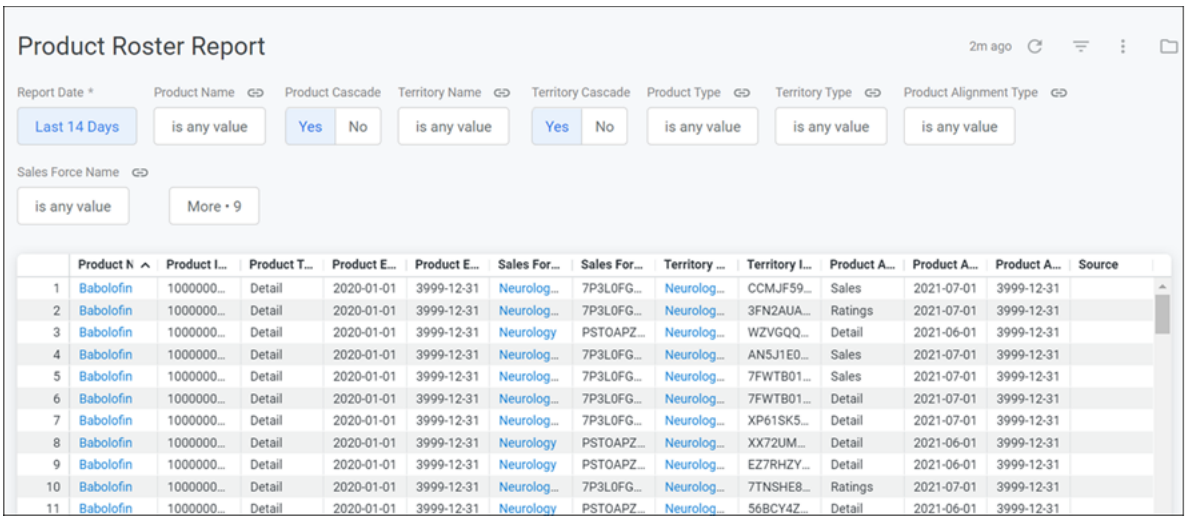
- **Parent Product Name**: Enter a parent product (downward) name to quickly select a name from the results list, or click ▾ to scroll and select the name(s) to view on the report.

- **Parent Product Integration Id**: Enter a parent integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.

- **Child Product**: Enter a child product (upward) name to quickly select a name from the results list, or click ▾ to scroll and select the name(s) to view on the report.

- **Child Product Integration Id**: Enter a child integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.

4. Click **Load** to view the report.



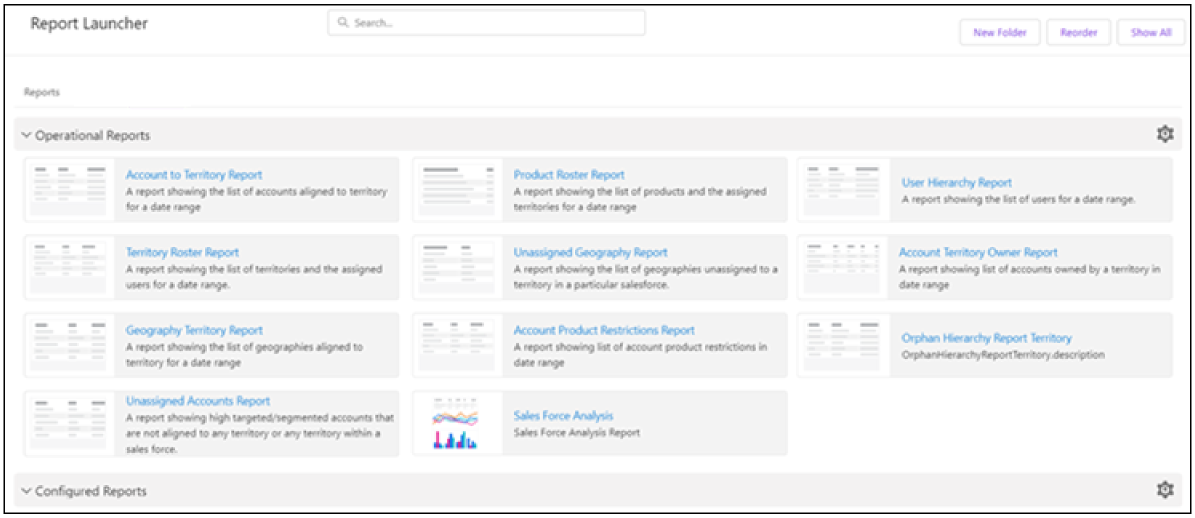
View the User Hierarchy Report

The User Hierarchy report displays a list of users that match selected criteria. You can analyze data for past, current, and future dates.

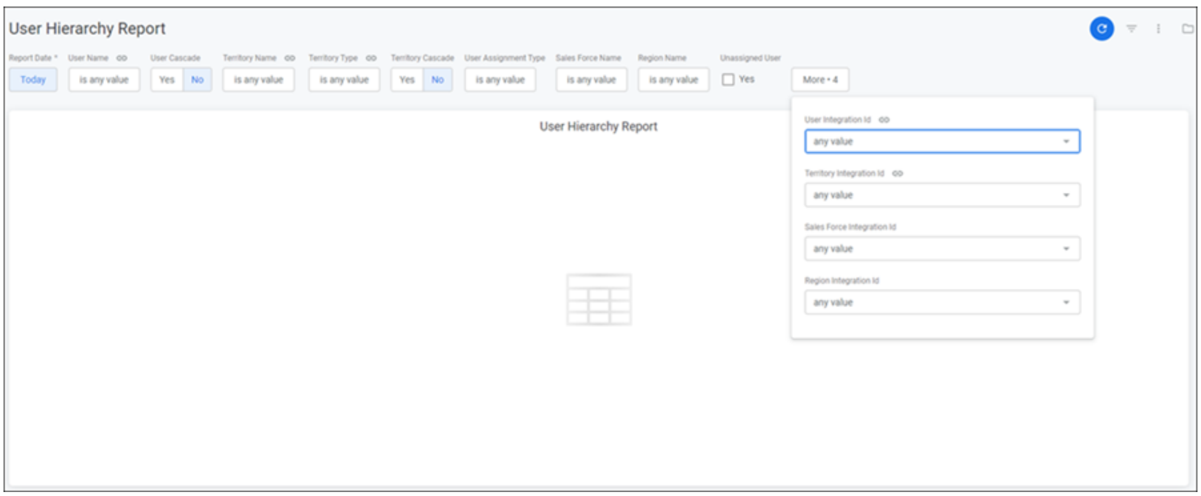
To view the User Hierarchy report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Operational Reports** section, click **User Hierarchy Report**.



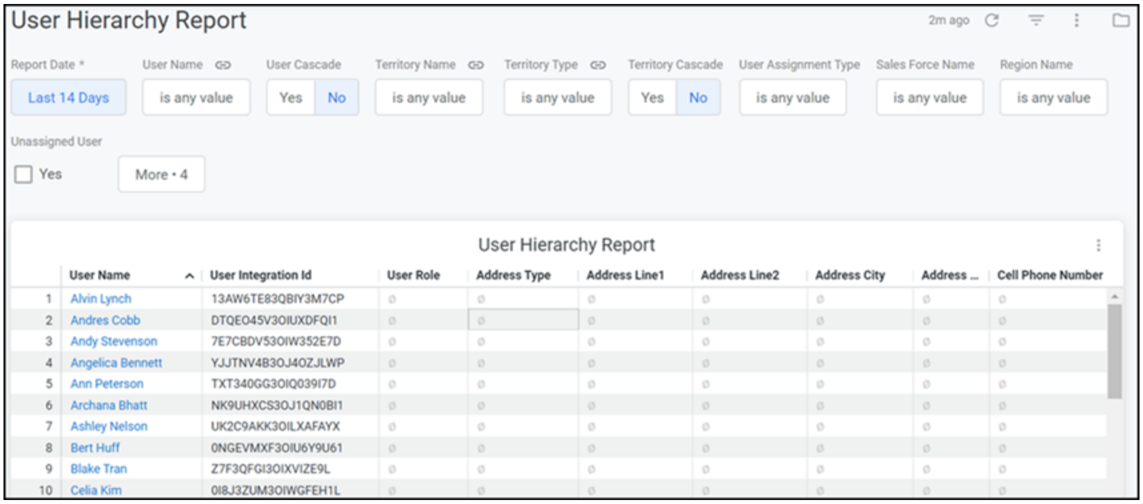
3. Click **More** to view all report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **User Name**: Enter a user's first or last name to quickly select a user from the results list, or click to scroll and select the user(s) to view on the report.
- **User Cascade**: Click **Yes** if you want the report to include underlying/child users. Otherwise, click **No**.
- **Territory Name**: Enter a territory name to quickly select a territory from the results list, or click to scroll and select the territory/territories to view on the report.

- **Territory Type**: Enter a territory type to quickly select a type from the results list, or click ▾ to scroll and select the territory type/t(s) to view on the report.
- **Territory Cascade**: Click **Yes** if you want the report to include underlying/child territories. Otherwise, click **No**.
- **User Assignment Type**: Enter a specific user assignment type (such as *Primary*, *Secondary*, etc.) to quickly select a user type from the results list, or click ▾ to scroll and select the types to view on the report.
- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click ▾ to scroll and select the sales force(es) to view on the report.
- **Region Name**: Enter a region to quickly select a region from the results list, or click ▾ to scroll and select the region(s) to view on the report.
- **Unassigned User: Yes**: Check this box to display a list of users on the report who are not assigned to any territory.
- **User Integration Id**: Enter user integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.

4. Click **Load**  to view the report.

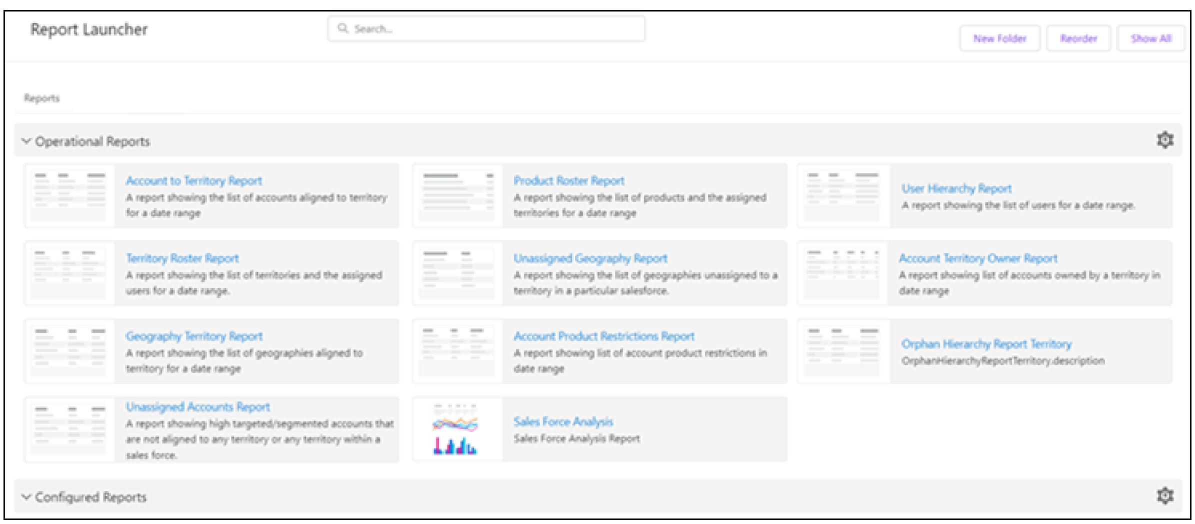


View the Territory Roster Report

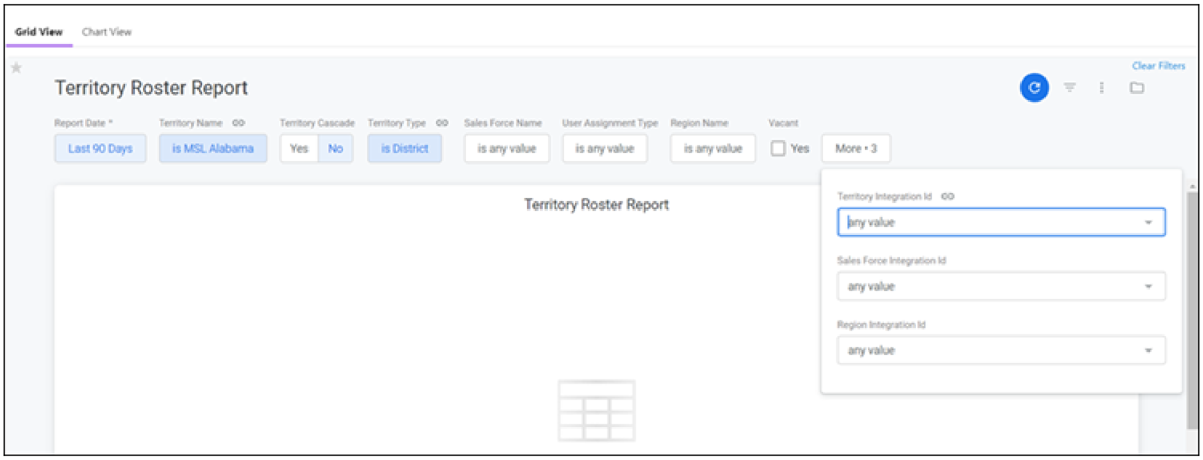
The Territory Roster report displays a list of territories that match selected criteria and includes the users assigned to the territories. You can analyze data for past, current, and future dates.

To view the Territory Roster report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Operational Reports** section, click **Territory Roster Report**.



3. Click **More** to view all report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.

  Territory Name: Enter a territory name to quickly select a territory from the results list, or click to scroll and select the territory/territories to view on the report.

- **Territory Cascade**: Click **Yes** if you want the report to include underlying/child territories. Otherwise, click **No**.

- **Territory Type**: Enter a territory type to quickly select a type from the results list, or click to scroll and select the territory type(s) to view on the report.

- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click to scroll and select the sales force(es) to view on the report.

- **User Assignment Type**: Enter a specific user assignment type (such as *Primary*, *Secondary*, etc.) to quickly select a user type from the results list, or click to scroll and select the types to view on the report.

- **Region Name**: Enter a region name to quickly select a region from the results list, or click to scroll and select the region(s) to view on the report.

- **Vacant: Yes**: Select to display a list of territories with no users assigned.

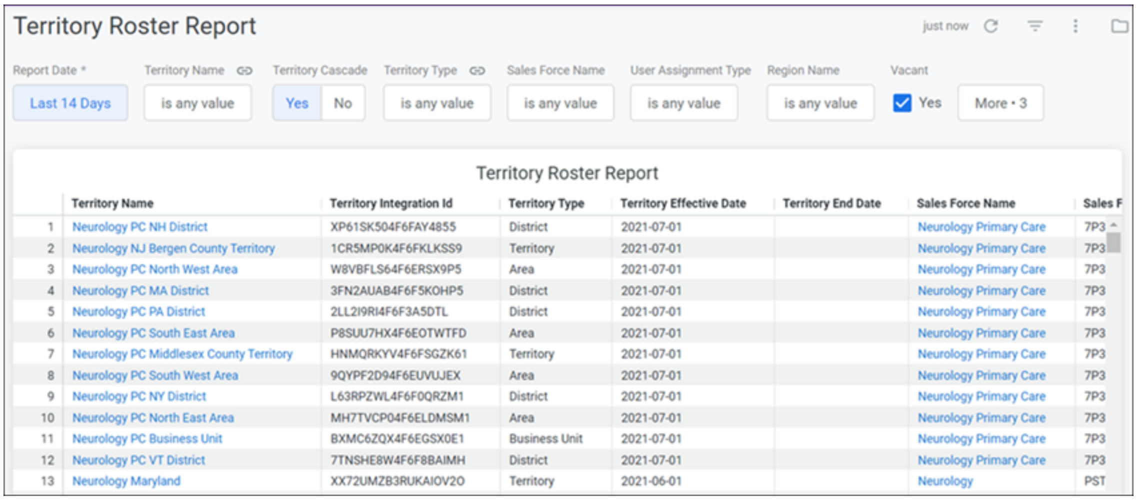
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.

- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.

- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.

4. Select the **Grid View** tab to view the results in grid view. Select the **Chart View** tab to view the results in chart view.

5. Click **Load** to view the report.



	Territory Name	Territory Integration Id	Territory Type	Territory Effective Date	Territory End Date	Sales Force Name	Sales F
1	Neurology PC NH District	XP61SK504F6FAY4855	District	2021-07-01		Neurology Primary Care	7P3
2	Neurology NJ Bergen County Territory	1CR5MP0K4F6FKLKSS9	Territory	2021-07-01		Neurology Primary Care	7P3
3	Neurology PC North West Area	W8VBFLS64F6ERSX9P5	Area	2021-07-01		Neurology Primary Care	7P3
4	Neurology PC MA District	3FN2AUAB4F6F5KOHP5	District	2021-07-01		Neurology Primary Care	7P3
5	Neurology PC PA District	2LL2I9RI4F6F3A5DTL	District	2021-07-01		Neurology Primary Care	7P3
6	Neurology PC South East Area	P8SUU7HX4F6EOTWTFD	Area	2021-07-01		Neurology Primary Care	7P3
7	Neurology PC Middlesex County Territory	HNMQRKYV4F6FSGZK61	Territory	2021-07-01		Neurology Primary Care	7P3
8	Neurology PC South West Area	9QYPF2D94F6EUVUJEX	Area	2021-07-01		Neurology Primary Care	7P3
9	Neurology PC NY District	L63RPZWL4F6F0QRZM1	District	2021-07-01		Neurology Primary Care	7P3
10	Neurology PC North East Area	MH7TVCP04F6ELDMSM1	Area	2021-07-01		Neurology Primary Care	7P3
11	Neurology PC Business Unit	BXMC6ZQX4F6EGSX0E1	Business Unit	2021-07-01		Neurology Primary Care	7P3
12	Neurology PC VT District	7TNSHE8W4F6F8BAIMH	District	2021-07-01		Neurology Primary Care	7P3
13	Neurology Maryland	XX72UMZB3RUKAIOV2O	Territory	2021-06-01		Neurology	PST

Tip: A user with User Explore access has a user-friendly and meaningful set of fields available in the Explore for Territory Roster Report. See Looker Edit.

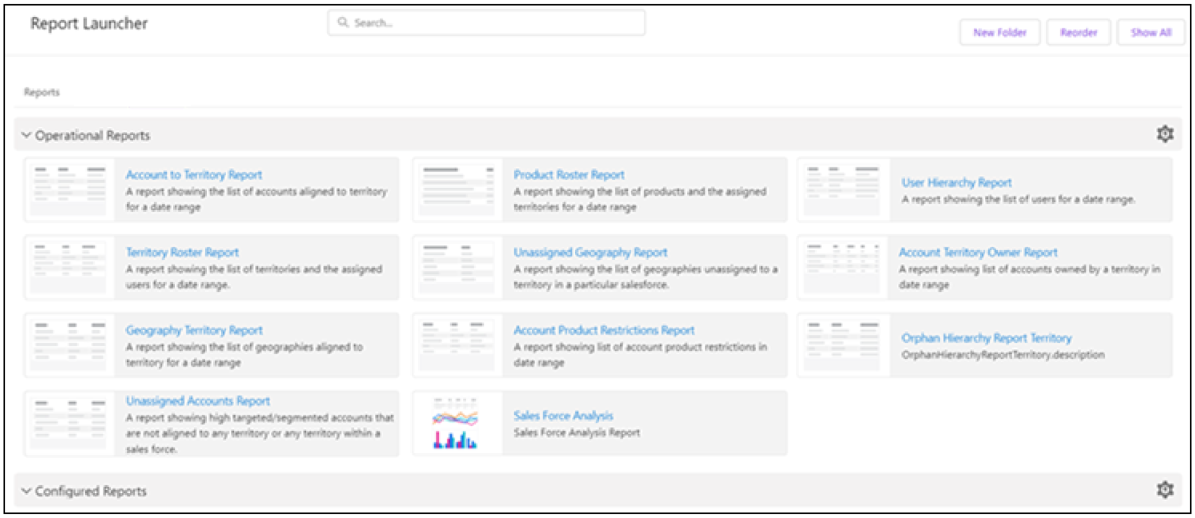
View the Unassigned Geography Report

The Unassigned Geography report displays the list of geographies not aligned to a territory.

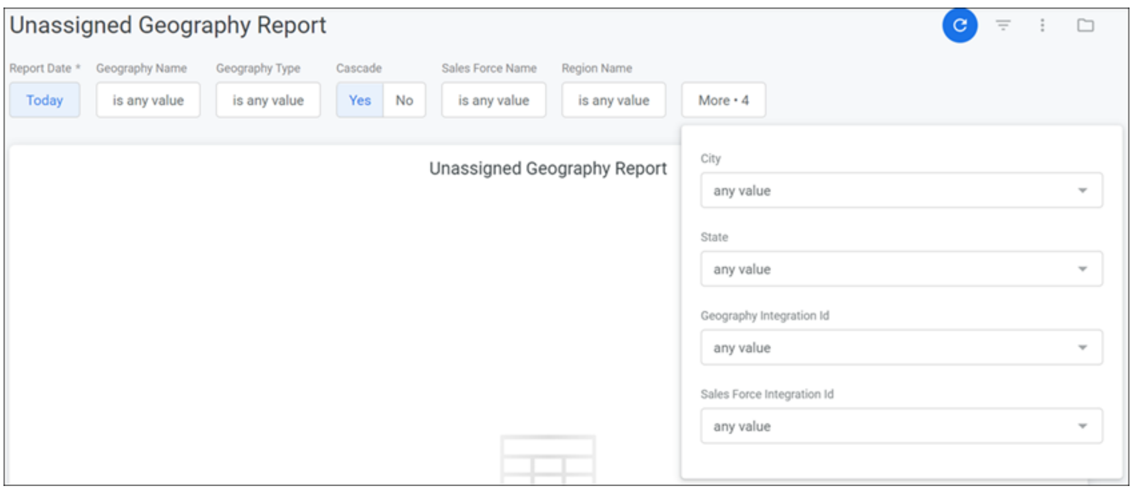
To view the Unassigned Geography report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Operational Reports** section, click **Unassigned Geography Report**.



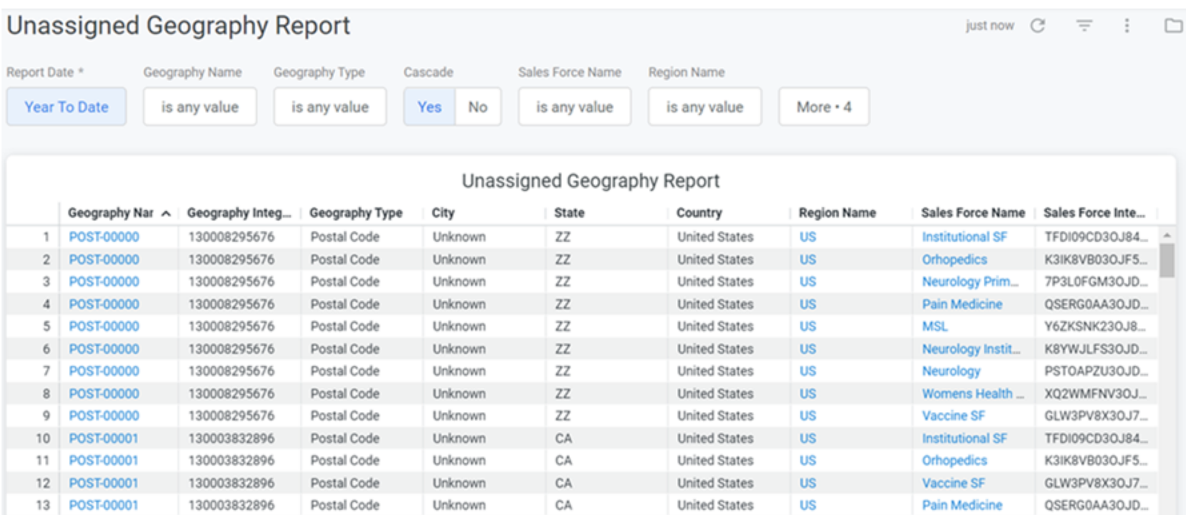
3. Click **More** to view all report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Geography Name**: Enter a geography name to quickly select a geography from the results list, or click to scroll and select the geographies to view on the report.
- **Geography Cascade**: Click **Yes** if you want the report to include underlying/child geographies. Otherwise, click **No**.
- **Geography Type**: Enter a geography type to quickly select a type from the results list, or click to scroll and select the geography type(s) to view on the report.

- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click to scroll and select the sales force(es) to view on the report.
- **Region Name**: Enter a region name to quickly select a region from the results list, or click to scroll and select the region(s) to view on the report.
- **City**: Enter a city name to quickly select a city from the results list, or click to scroll and select the city/cities to view on the report.
- **State**: Enter a state name to quickly select a state from the results list, or click to scroll and select the state(s) to view on the report.
- **Geography Integration Id**: Enter a geography integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.

4. Click **Load** to view the report.



Unassigned Geography Report

just now

Report Date * Year To Date | Geography Name is any value | Geography Type is any value | Cascade Yes No | Sales Force Name is any value | Region Name is any value | More • 4

Unassigned Geography Report

	Geography Nar	Geography Integ...	Geography Type	City	State	Country	Region Name	Sales Force Name	Sales Force Inte...
1	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Institutional SF	TFDI09CD3OJ84...
2	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Orhopedics	K3IK8VB03OJF5...
3	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Neurology Prim...	7P3L0FGM3OJD...
4	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Pain Medicine	QSERG0AA3OJD...
5	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	MSL	Y6ZKSNK23OJ8...
6	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Neurology Instit...	K8YWJLFS3OJD...
7	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Neurology	PSTOAPZU3OJD...
8	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Womens Health ...	XQ2WMFNV3OJ...
9	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Vaccine SF	GLW3PV8X3OJ7...
10	POST-00001	130003832896	Postal Code	Unknown	CA	United States	US	Institutional SF	TFDI09CD3OJ84...
11	POST-00001	130003832896	Postal Code	Unknown	CA	United States	US	Orhopedics	K3IK8VB03OJF5...
12	POST-00001	130003832896	Postal Code	Unknown	CA	United States	US	Vaccine SF	GLW3PV8X3OJ7...
13	POST-00001	130003832896	Postal Code	Unknown	CA	United States	US	Pain Medicine	QSERG0AA3OJD...

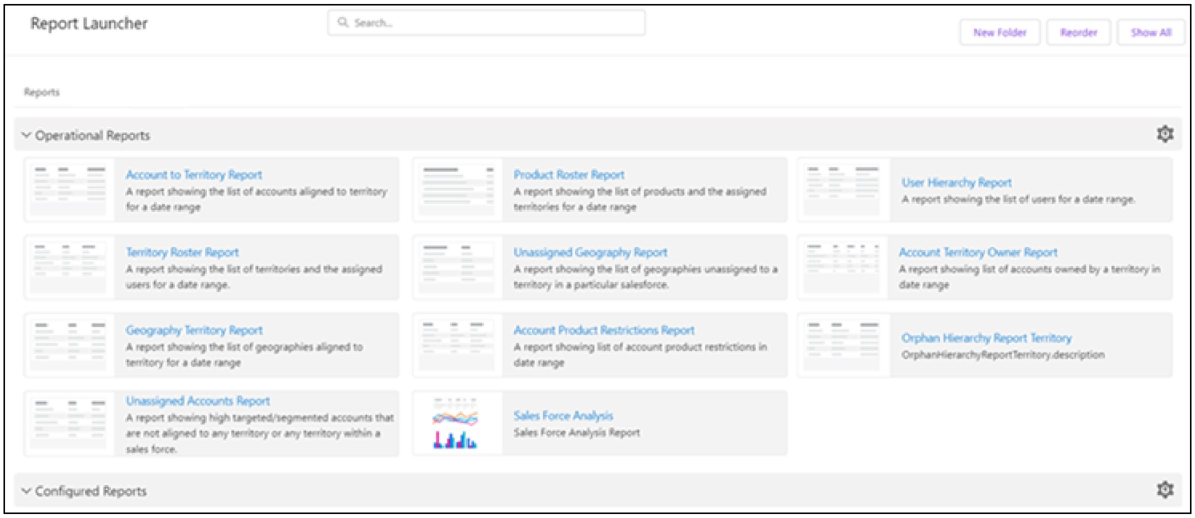
View the Account Territory Owner Report

The Account Territory Owner report shows the list of accounts owned by a territory in date range. You can analyze data for past, current, and future dates.

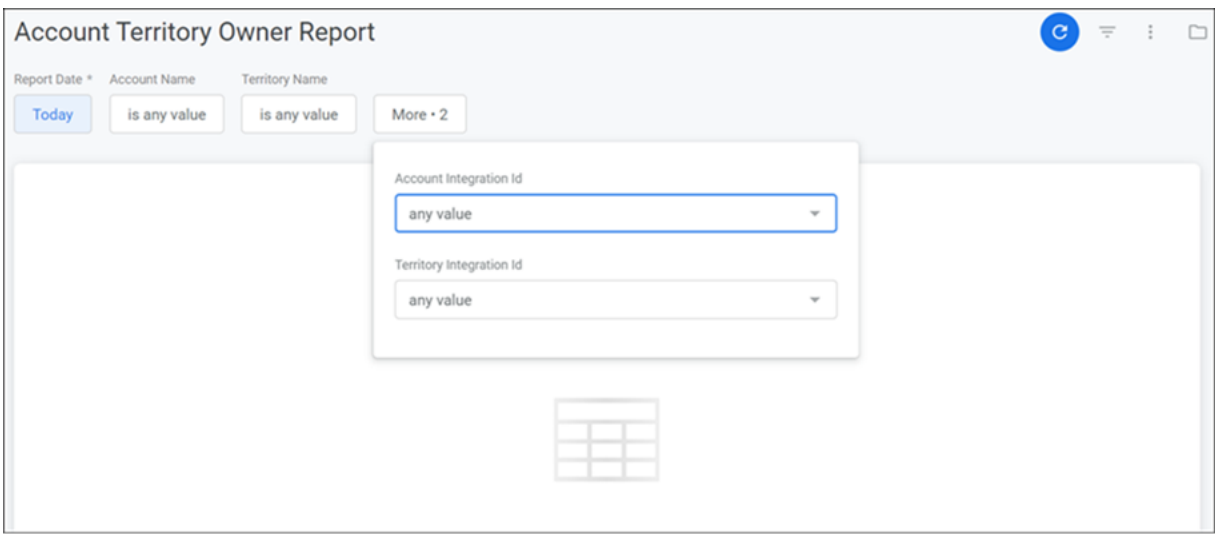
To view the Account Territory Owner report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Operational Reports** section, click **Account Territory Owner Report**.



3. Click **More** to view all report filters.

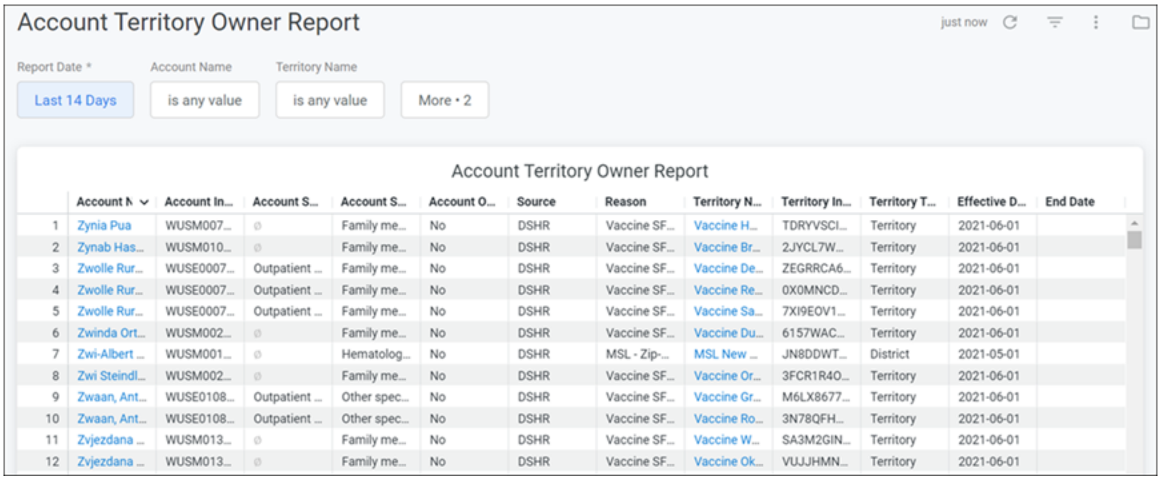


- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Account Name**: Enter an account name to quickly select an account from the results list or click to scroll and select the territory/territories to view on the report.
- **Territory Name**: Enter an account territory name to quickly select a territory from the results list or click to scroll and select the territory/territories to view on the report.

- **Account Integration Id**: Enter an account integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.

4. Click **Load** to view the report.

> **Note:** Both active and inactive accounts display.



	Account N	Account In...	Account S...	Account S...	Account O...	Source	Reason	Territory N...	Territory In...	Territory T...	Effective D...	End Date
1	Zynia Pua	WUSM007...	∅	Family me...	No	DSHR	Vaccine SF...	Vaccine H...	TDRYVSCI...	Territory	2021-06-01	
2	Zynab Has...	WUSM010...	∅	Family me...	No	DSHR	Vaccine SF...	Vaccine Br...	2JYCL7W...	Territory	2021-06-01	
3	Zwolle Rur...	WUSE0007...	Outpatient ...	Family me...	No	DSHR	Vaccine SF...	Vaccine De...	ZEGRRCA6...	Territory	2021-06-01	
4	Zwolle Rur...	WUSE0007...	Outpatient ...	Family me...	No	DSHR	Vaccine SF...	Vaccine Re...	0X0MNCD...	Territory	2021-06-01	
5	Zwolle Rur...	WUSE0007...	Outpatient ...	Family me...	No	DSHR	Vaccine SF...	Vaccine Sa...	7XI9EOV1...	Territory	2021-06-01	
6	Zwinda Ort...	WUSM002...	∅	Family me...	No	DSHR	Vaccine SF...	Vaccine Du...	6157WAC...	Territory	2021-06-01	
7	Zwi-Albert ...	WUSM001...	∅	Hematolog...	No	DSHR	MSL - Zip-...	MSL New ...	JN8DDWT...	District	2021-05-01	
8	Zwi Steindl...	WUSM002...	∅	Family me...	No	DSHR	Vaccine SF...	Vaccine Or...	3FCR1R4O...	Territory	2021-06-01	
9	Zwaan, Ant...	WUSE0108...	Outpatient ...	Other spec...	No	DSHR	Vaccine SF...	Vaccine Gr...	M6LX8677...	Territory	2021-06-01	
10	Zwaan, Ant...	WUSE0108...	Outpatient ...	Other spec...	No	DSHR	Vaccine SF...	Vaccine Ro...	3N78QFH...	Territory	2021-06-01	
11	Zvjezdana ...	WUSM013...	∅	Family me...	No	DSHR	Vaccine SF...	Vaccine W...	SA3M2GIN...	Territory	2021-06-01	
12	Zvjezdana ...	WUSM013...	∅	Family me...	No	DSHR	Vaccine SF...	Vaccine Ok...	VUJJHMN...	Territory	2021-06-01	

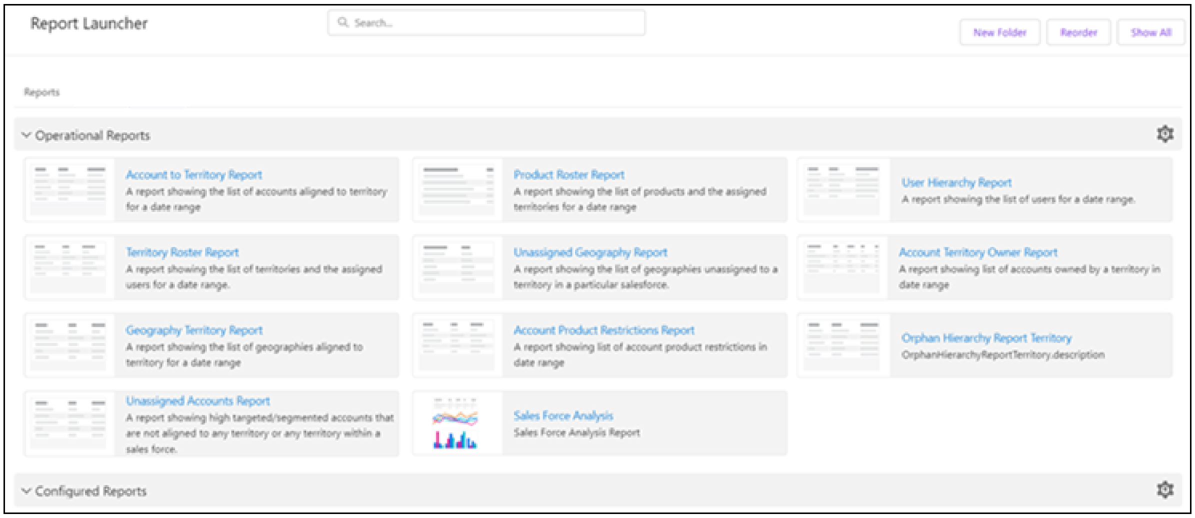
View the Geography to Territory Report

The Geography to Territory report displays the list of geographies aligned to the territories. You can analyze data for past, current, and future dates.

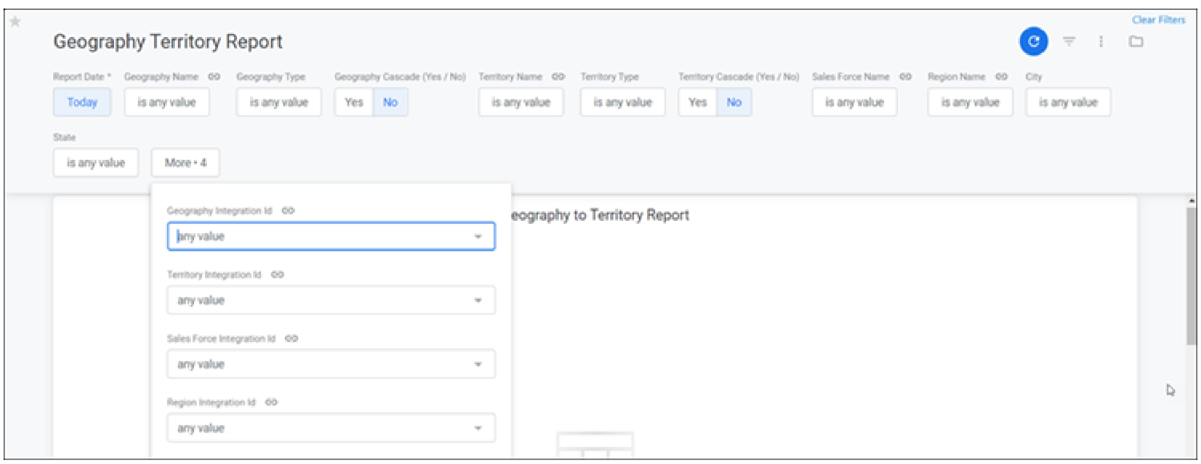
To view the Geography to Territory Report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Operational Reports** section, click **Geography to Territory Report**.



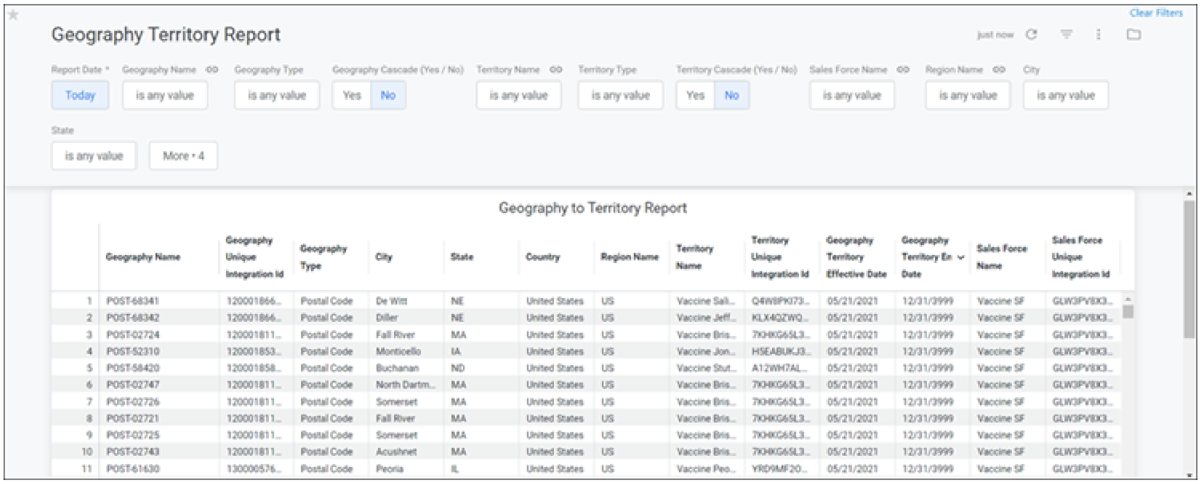
3. Click **More** to view all report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Geography Name**: Enter a geography name to quickly select a geography from the results list or click ▾ to scroll and select the geography(s) to view on the report.
- **Geography Type**: Enter a geography type to quickly select a type from the results list, or click ▾ to scroll and select the geography type(s) to view on the report.

- **Geography Cascade**: Click **Yes** if you want the report to include underlying/child geographies. Otherwise, click **No**.
- **Territory Name**: Enter a territory name to quickly select a territory from the results list, or click to scroll and select the territory/territories to view on the report.
- **Territory Type**: Enter a territory type to quickly select a type from the results list or click to scroll and select the territory type(s) to view on the report.
- **Territory Cascade**: Click **Yes** if you want the report to include underlying/child territories. Otherwise, click **No**.
- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click to scroll and select the sales force(es) to view on the report.
- **Region Name**: Enter a region to quickly select a region from the results list, or click to scroll and select the region(s) to view on the report.
- **City**: Enter a city to quickly select a city from the results list, or click to scroll and select the city(s) to view on the report.
- **State**: Enter a state to quickly select a state from the results list, or click to scroll and select the state(s) to view on the report.
- **Geography Integration Id**: Enter a geography integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.

4. Click **Load**  to view the report.

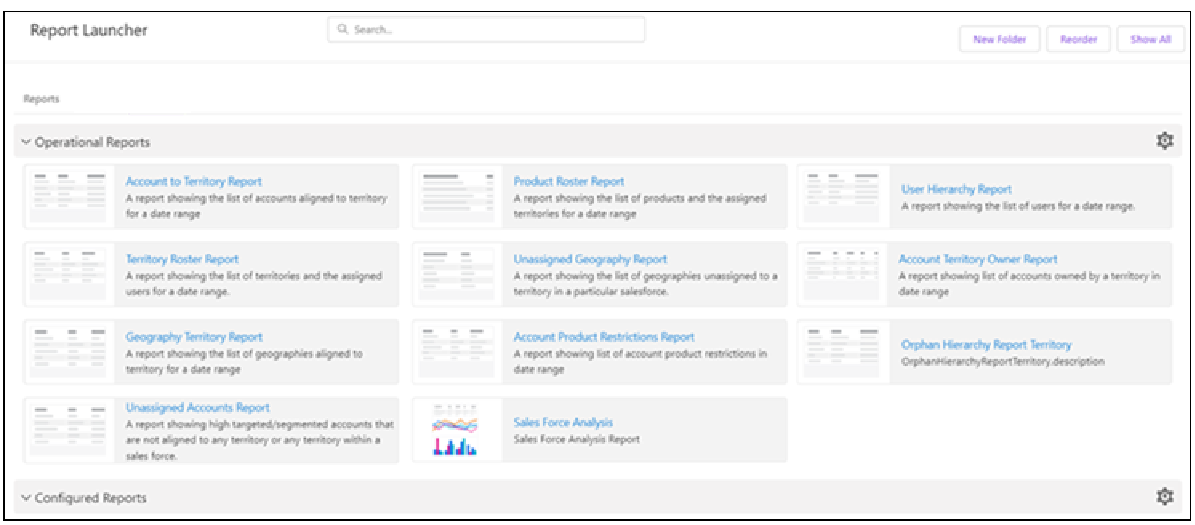


View the Account Product Restrictions Report

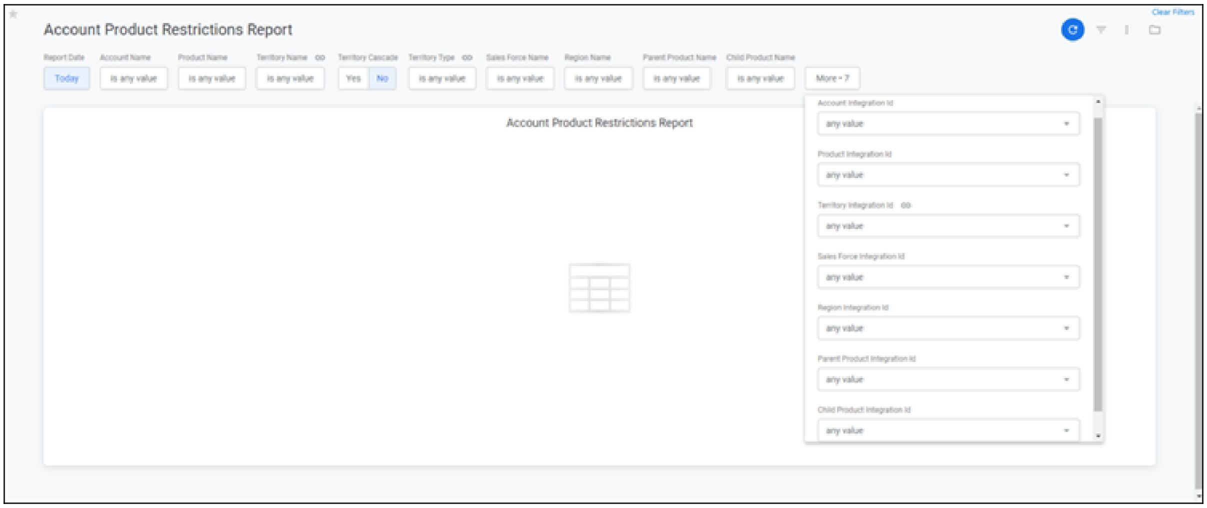
The Account Product Restrictions report displays the list of account product restrictions and account product territory restrictions.

To view the Account Product Restrictions Report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Operational Reports** section, click **Account Product Restrictions Report**.



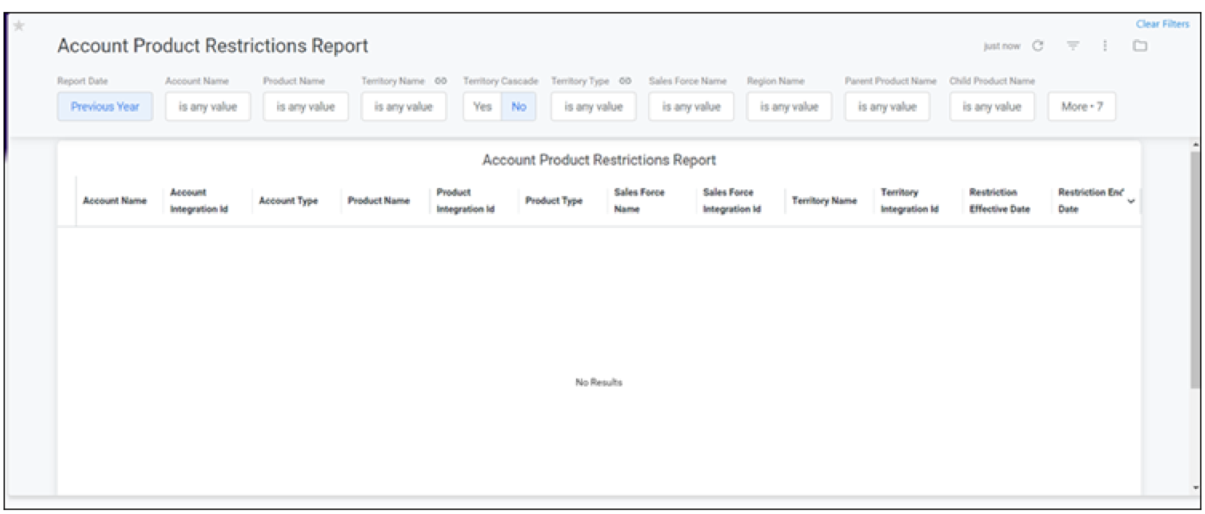
3. Click **More** to view all report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Account Name**: Enter an account name to quickly select an account from the results list or click to scroll and select the account/accounts to view on the report.
- **Product Name**: Enter a product name to quickly select a product from the results list or click to scroll and select the product /products to view on the report.
- **Territory Name**: Enter a territory name to quickly select a territory from the results list or click to scroll and select the territory/territories to view on the report.
- **Territory Cascade**: Click **Yes** if you want the report to include underlying/child territories. Otherwise, click **No**.
- **Territory Type**: Enter a territory type to quickly select a type from the results list or click to scroll and select the territory type(s) to view on the report.
- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list or click to scroll and select the sales force(es) to view on the report.
- **Region Name**: Enter a region to quickly select a region from the results list or click to scroll and select the region(s) to view on the report.

- **Parent Product Name**: Enter a parent product name to quickly select a product from the results list or click to scroll and select the product(s) to view on the report.
- **Child Product Name**: Enter a child product name to quickly select a product from the results list or click to scroll and select the product(s) to view on the report.
- **Account Integration Id**: Enter an account integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.
- **Product Integration Id**: Enter a product integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.
- **Parent Product Integration Id**: Enter a parent product integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.
- **Child Product Integrations Id**: Enter a child product integration Id to quickly select an Id from the results list or click to scroll and select the Id(s) to view on the report.

4. Click **Load** to view the report.

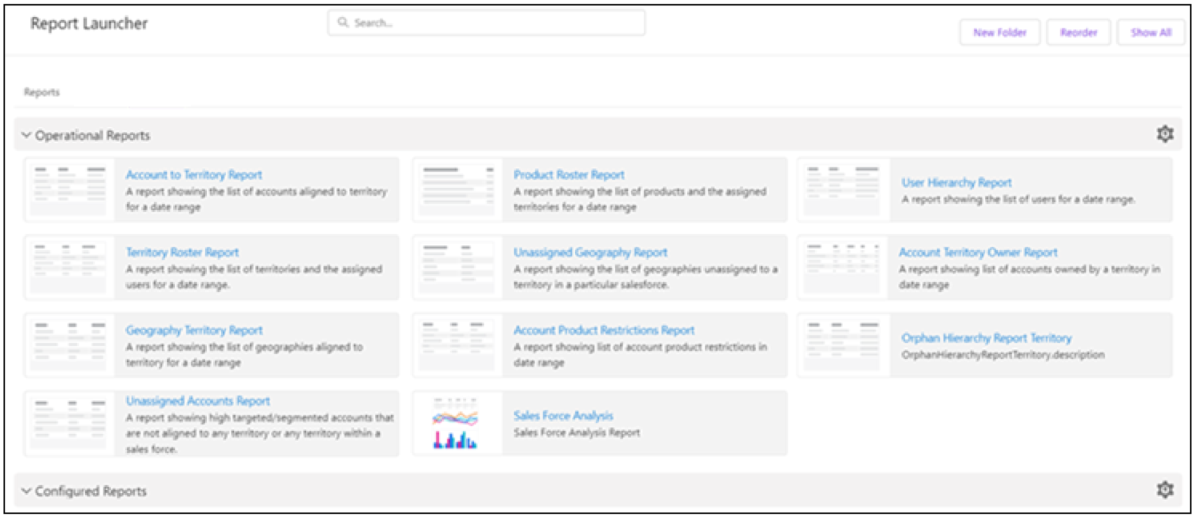


View the Orphan Hierarchy Report

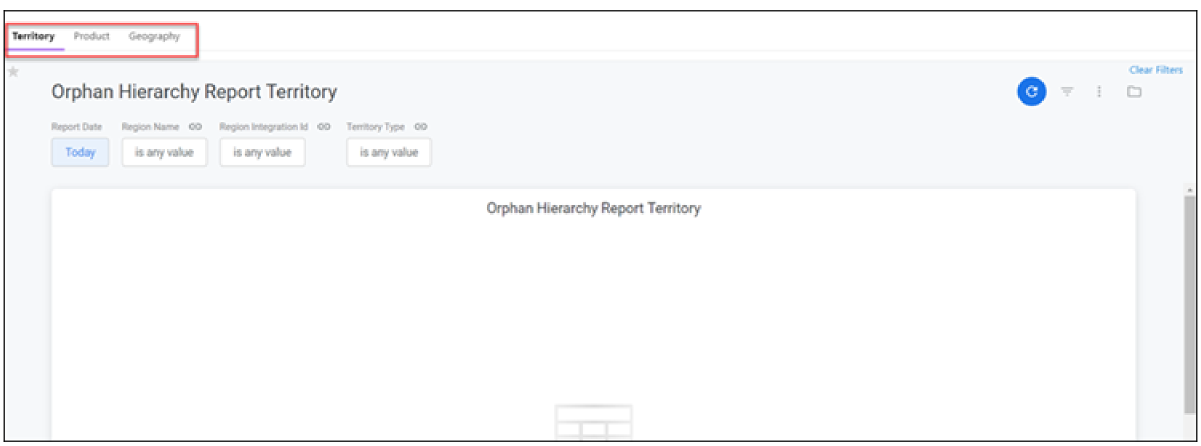
The Orphan Hierarchy report identifies any missing hierarchy records.

To view the Orphan Hierarchy Report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Operational Reports** section, click **Orphan Hierarchy Report**.



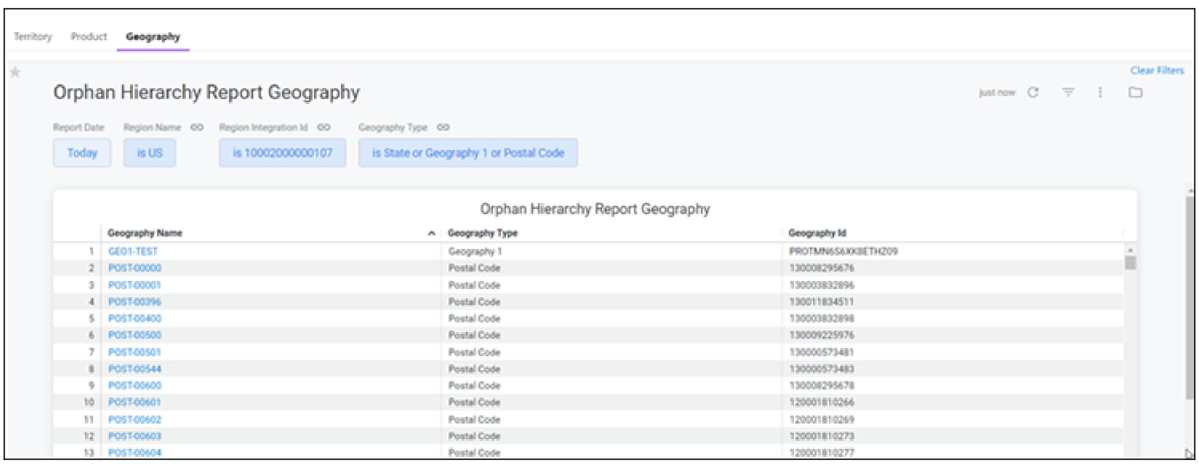
3. Select the **Territory** tab to run the report that lists missing territory records; select the **Product** tab to run the report that lists missing product records; select the **Geography** tab to run the report that lists missing geography records.



The fields that appear depend on the selected tab. All fields are listed below.

- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Region Name**: Enter a region name to quickly select a region from the results list, or click to scroll and select the region(s) to view on the report.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Territory Type**: Enter a territory type to quickly select a type from the results list, or click to scroll and select the territory type(s) to view on the report.
- **Product Type**: Enter a product type to quickly select a type from the results list, or click to scroll and select the product type(s) to view on the report.
- **Geography Type**: Enter a geography type to quickly select a type from the results list, or click to scroll and select the geography type(s) to view on the report.

4. Click **Load** to view the report.



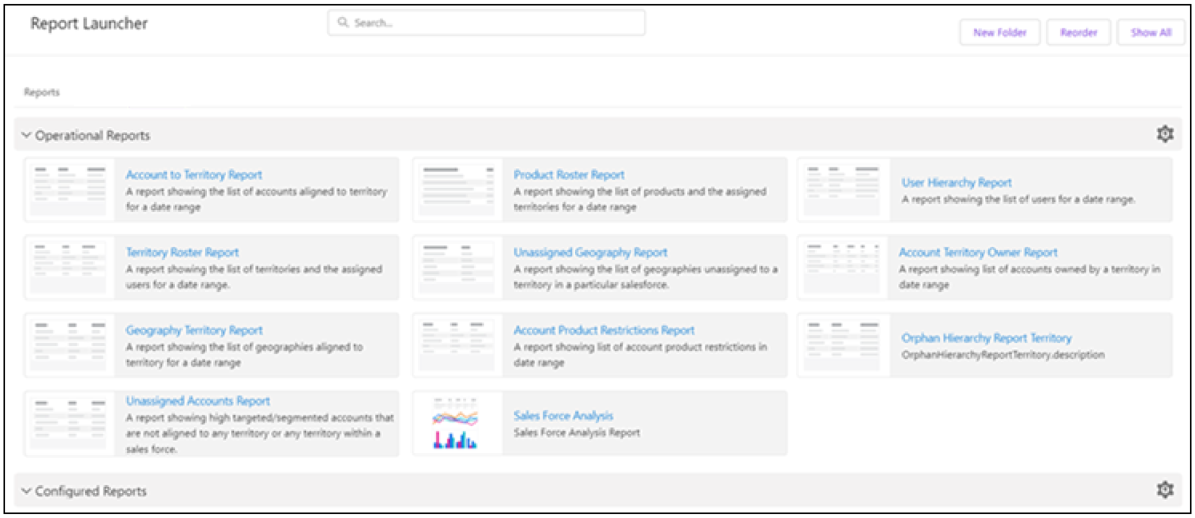
View the Unassigned Accounts Report

The Unassigned Accounts Report lets you view highly segmented accounts that are not aligned to any territory or any territory within a sales force.

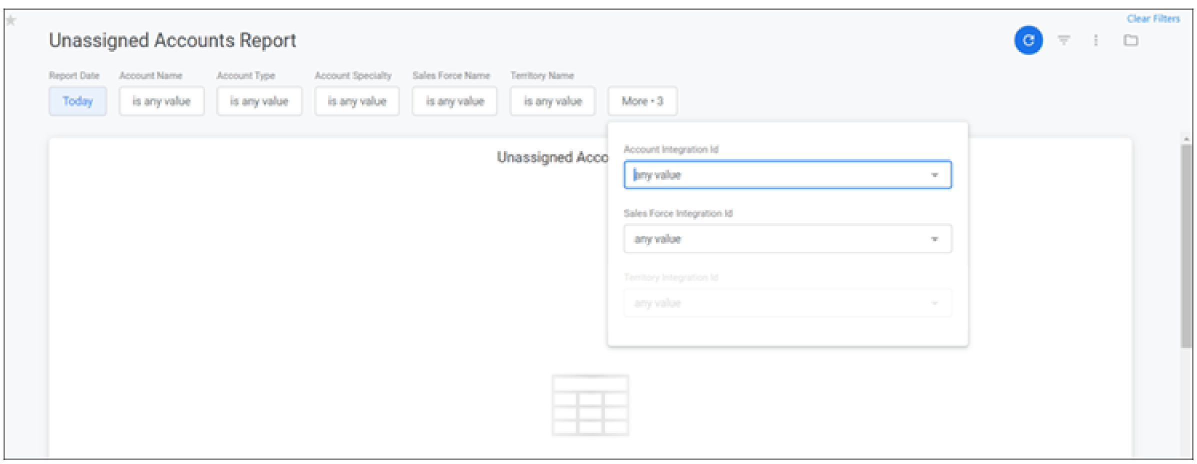
To view the Unassigned Accounts Report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Operational Reports** section, click **Unassigned Accounts Report**.



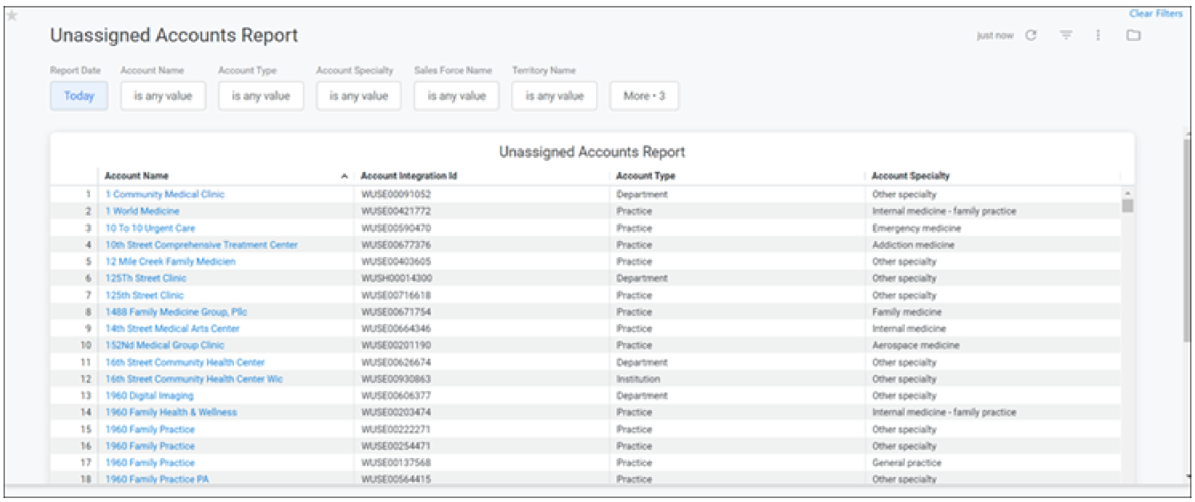
3. Click **More** to view all report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Account Name**: Enter an account name to quickly select an account from the results list, or click ▾ to scroll and select the account/accounts to view on the report.
- **Account Type**: Select the account type to filter the result set to the specific account type.
- **Account Specialty**: Select the account specialty to filter the result set to the specific specialty.
- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click to scroll and select the sales force(es) to view on the report.

- **Territory Name**: Enter a territory name to quickly select a territory from the results list, or click to scroll and select the territory/territories to view on the report.
- **Account Integration Id**: Enter an account integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.

4. Click **Load**  to view the report.



	Account Name	Account Integration Id	Account Type	Account Specialty
1	1 Community Medical Clinic	WUSE00091052	Department	Other specialty
2	1 World Medicine	WUSE00421772	Practice	Internal medicine - family practice
3	10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine
4	10th Street Comprehensive Treatment Center	WUSE00677376	Practice	Addiction medicine
5	12 Mile Creek Family Medicien	WUSE00403605	Practice	Other specialty
6	125Th Street Clinic	WUSH00014300	Department	Other specialty
7	125th Street Clinic	WUSE00716618	Practice	Other specialty
8	1488 Family Medicine Group, Pllc	WUSE00671754	Practice	Family medicine
9	14th Street Medical Arts Center	WUSE00664346	Practice	Internal medicine
10	152Nd Medical Group Clinic	WUSE00201190	Practice	Aerospace medicine
11	16th Street Community Health Center	WUSE00626674	Department	Other specialty
12	16th Street Community Health Center Wic	WUSE00930863	Institution	Other specialty
13	1960 Digital Imaging	WUSE00606377	Department	Other specialty
14	1960 Family Health & Wellness	WUSE00203474	Practice	Internal medicine - family practice
15	1960 Family Practice	WUSE00222271	Practice	Other specialty
16	1960 Family Practice	WUSE00254471	Practice	Other specialty
17	1960 Family Practice	WUSE00137568	Practice	General practice
18	1960 Family Practice PA	WUSE00564415	Practice	Other specialty

View the Sales Force Analysis Report

The Sales Force Analysis report includes two types of output:

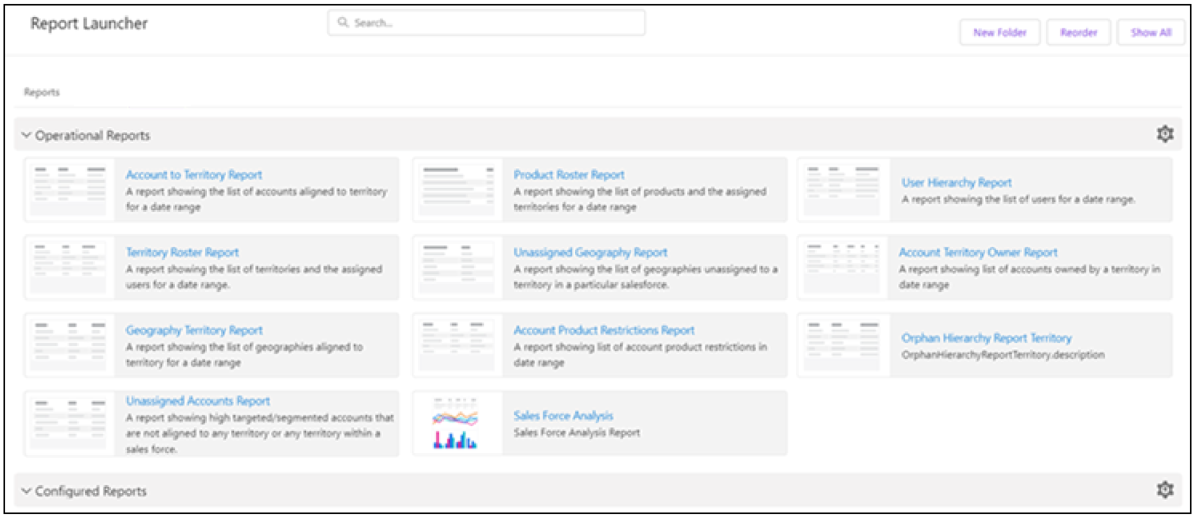
The Sales Force Analysis report displays the accounts aligned at the sales force level with a detailed break down at each territory level and roll-up at the manager level.

The Sales Force Comparison report displays the same information as the report, but in graph format.

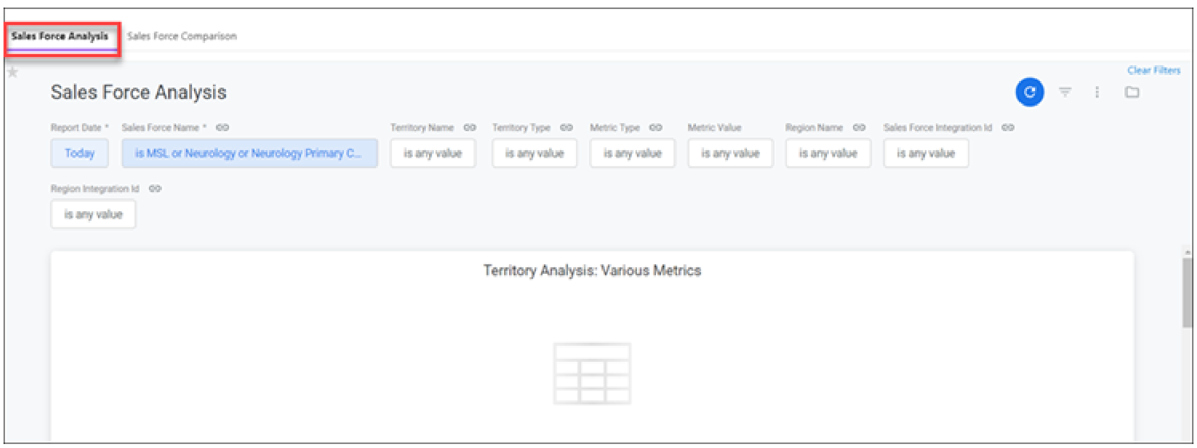
To view the Sales Force Analysis report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Operational Reports** section, click **Sales Force Analysis**.



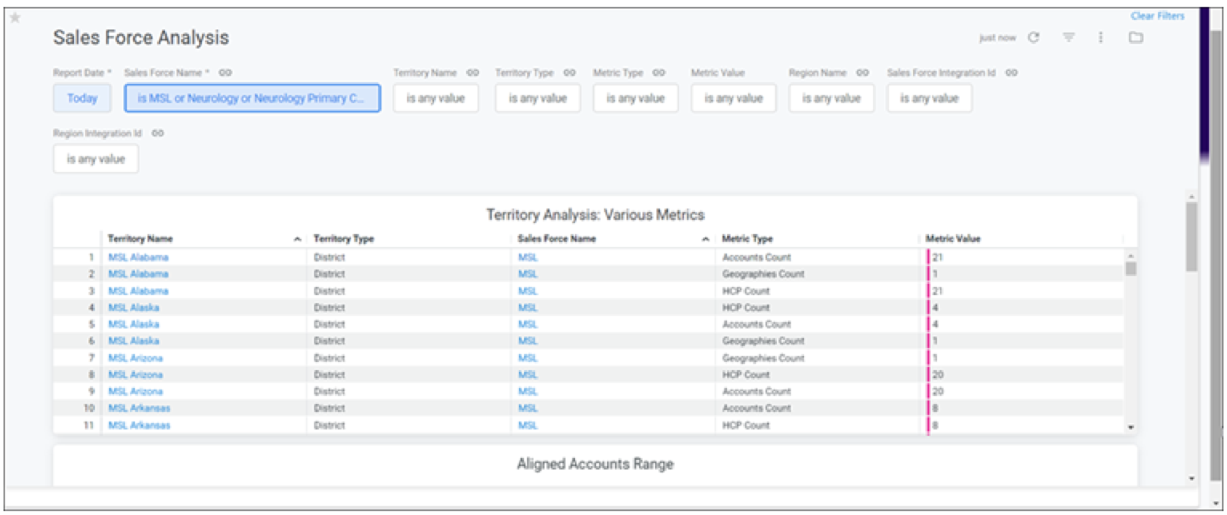
3. Select the **Sales Force Analysis** tab and enter the report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click ▾ to scroll and select the sales force(es) to view on the report.
- **Territory Name**: Enter a territory name to quickly select a territory from the results list, or click ▾ to scroll and select the territory/territories to view on the report.
- **Territory Type**: Enter a territory type to quickly select a type from the results list, or click ▾ to scroll and select the territory type(s) to view on the report.

- **Metric Type**: Enter a metric type to quickly select a type from the results list, or click to scroll and select the metric type(s) to view on the report.
- **Metric Value**: Enter a metric value to quickly select a value from the results list, or click to scroll and select the metric value(s) to view on the report.
- **Region Name**: Enter a region to quickly select a region from the results list, or click to scroll and select the region(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.

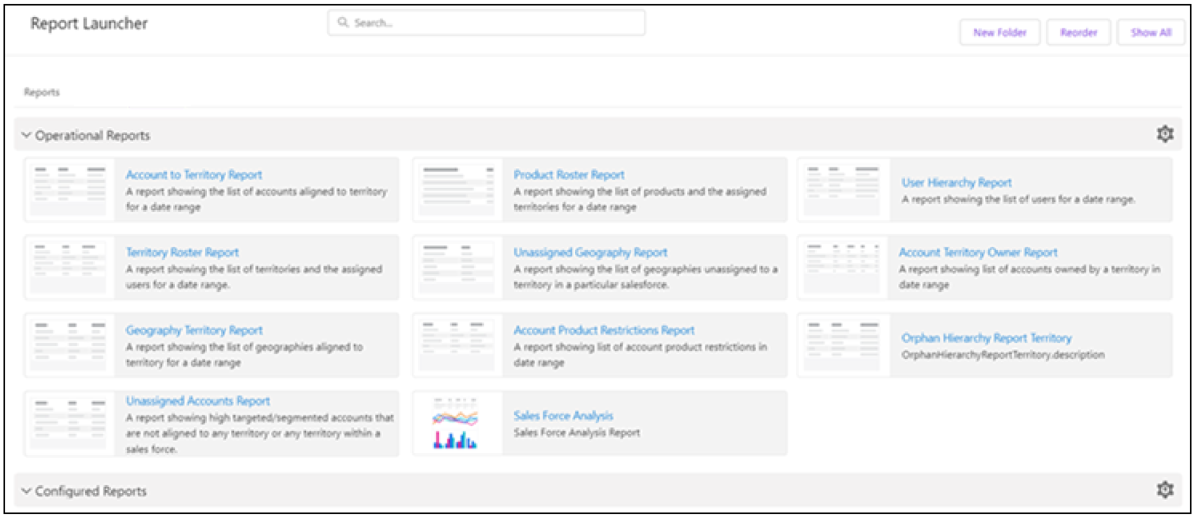
4. Click **Load** to view the report.



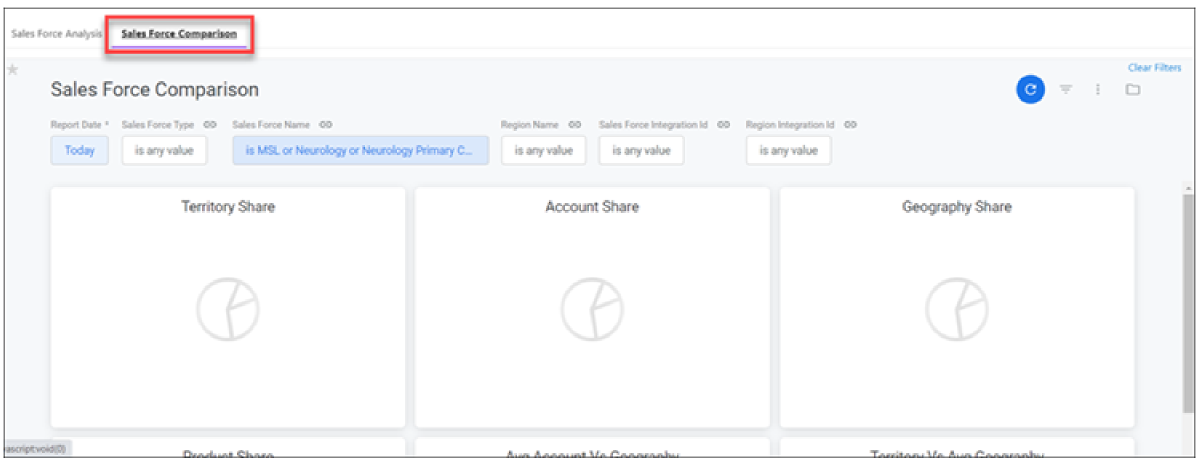
To view the Sales Force Comparison report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Operational Reports** section, click **Sales Force Analysis**.



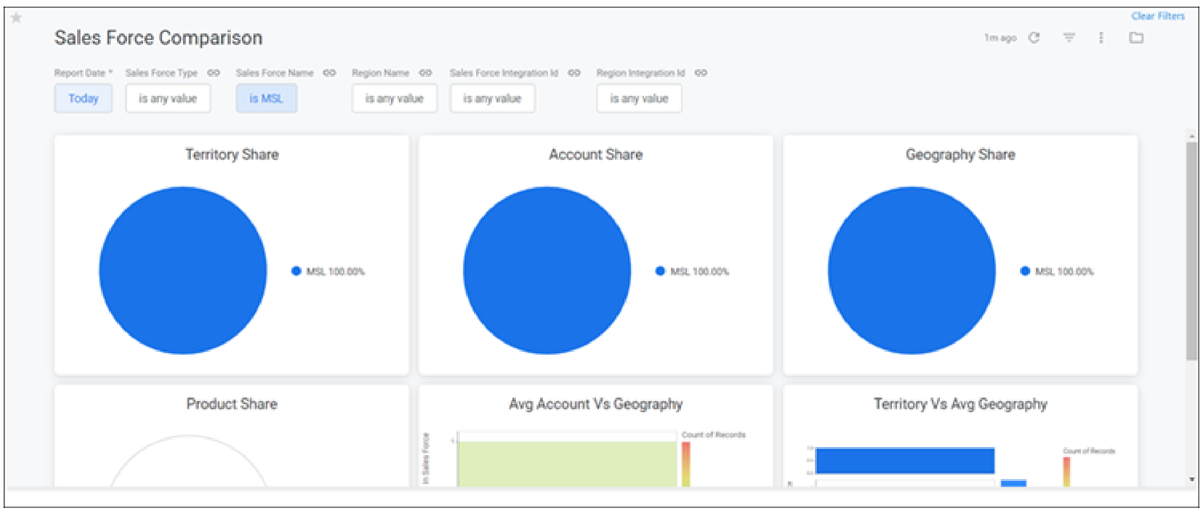
3. Select the **Sales Force Comparison** tab and enter the report filters.



- **Report Date**: Use the **Presets** or **Custom** tabs to select the date(s) to display report data.
- **Sales Force Type**: Enter a sales force type to quickly select a sales force type from the results list, or click to scroll and select the sales force type(s) to view on the report.
- **Sales Force Name**: Enter a sales force to quickly select a sales force from the results list, or click to scroll and select the sales force(es) to view on the report.
- **Territory Name**: Enter a territory name to quickly select a territory from the results list, or click to scroll and select the territory/territories to view on the report.

- **Territory Type**: Enter a territory type to quickly select a type from the results list, or click to scroll and select the territory type(s) to view on the report.
- **Region Name**: Enter a region to quickly select a region from the results list, or click to scroll and select the region(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.

4. Click **Load** to view the report.



Audit Trail Reports

Home Office users (global and regional) can track who made a change and when they made the change with Audit Trail Reports. Access Audit Trail Reports on the **Reports** tab from the **Reports** module.

An audit trail is tracked upon an *Add*, *Delete*, and *name change* action in the following modules:

- **Territories**
- **Users**
- **Sales Forces**

- **Products**
- **Regions**

The system administrator can enable audit trail for other attributes for these modules and set up audit trail for relationship entities such as User Assignment, Account Alignments Explicit, etc. Additional attributes enabled for the listed modules are also visible on the modules' **Details History-Time** tabs in the **Field History** grid.

To view information on each Audit Trail Report, see:

- View the Territory Audit Trail Report
- View the User Audit Trail Report
- View the Sales Force Audit Trail Report
- View the Product Audit Trail Report
- View the Region Audit Trail Report
- View the Geography Audit Trail Report

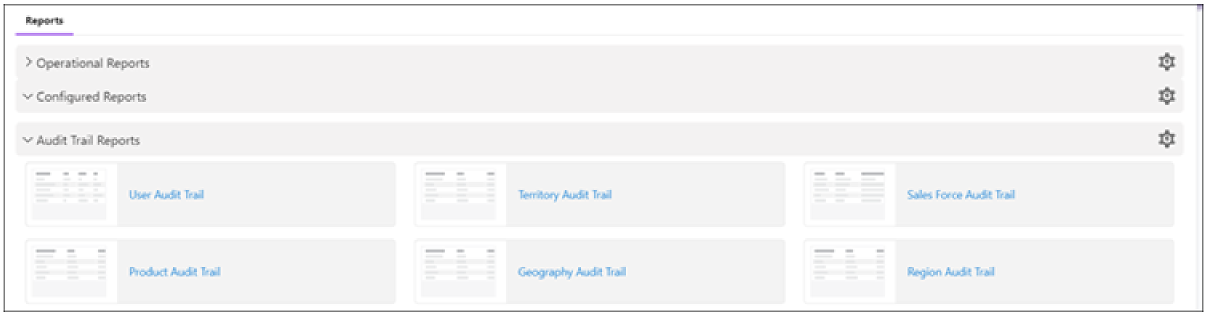
View the User Audit Trail Report

The User Audit Trail report includes details on field changes in the **Users** module, who made the change, and when the change was made.

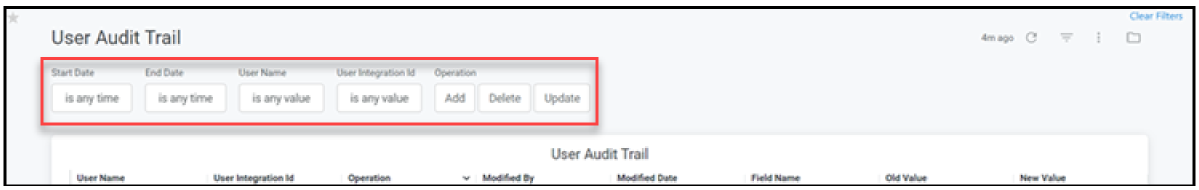
To view the User Audit Trail report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Audit Trail Reports** section, click **User Audit Trail**.

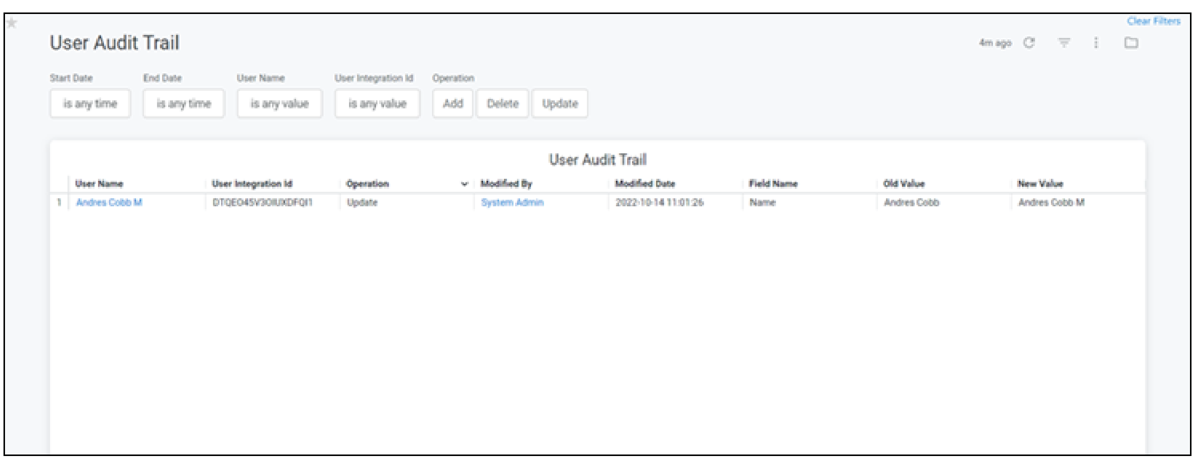


3. Enter the criteria for the report.



- **Start Date** and **End Date**: Select/enter the date(s) to display report data.
- **User Name**: Enter a user's first or last name to quickly select a user from the results list, or click to scroll and select the user(s) to view on the report.
- **User Integration Id**: Enter a user integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Operation**: Select *Add*, *Delete*, or *Update* to filter on a specific operation.

4. Click Load  to view the report.



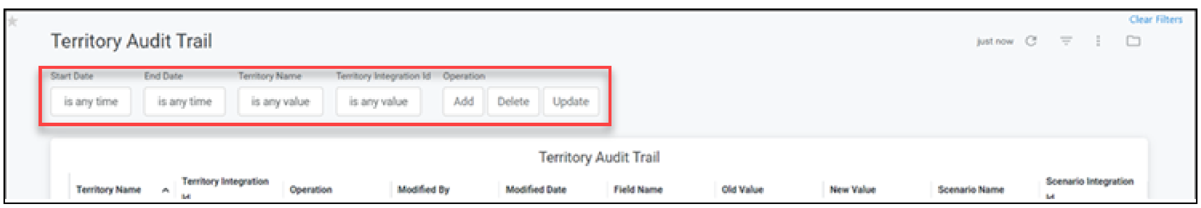
View the Territory Audit Trail Report

The Territory Audit Trail report includes details on field changes in the **Territories** module, who made the change, and when the change was made.

To view the Territory Audit Trail report

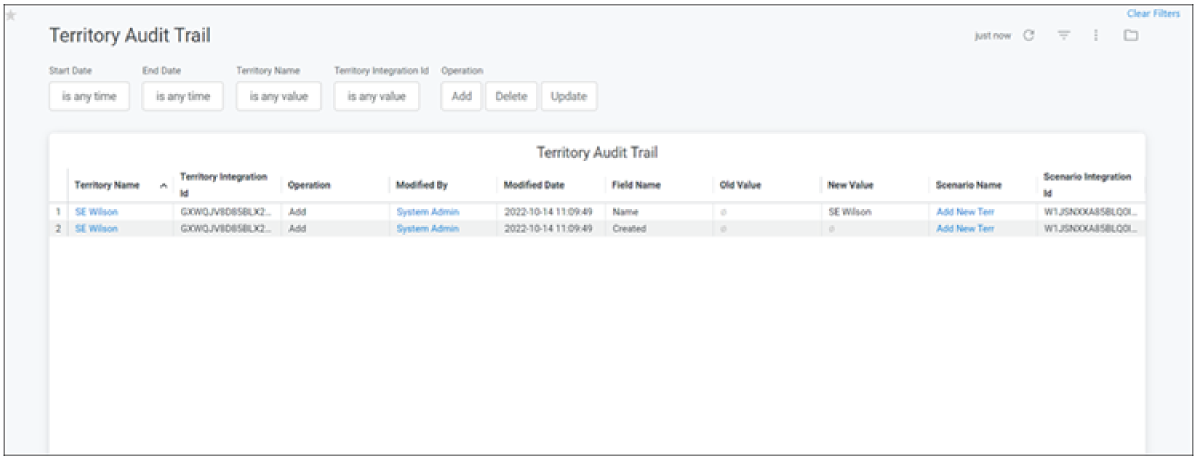
1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Audit Trail Reports** section, click **Territory Audit Trail**.

3. Enter the criteria for the report.



- **Start Date** and **End Date**: Select/enter the date(s) to display report data.
- **Territory Name**: Enter a territory name to quickly select a territory from the results list, or click to scroll and select the territory(s) to view on the report.
- **Territory Integration Id**: Enter a territory integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Operation**: Select *Add*, *Delete*, or *Update* to filter on a specific operation.

4. Click Load  to view the report.

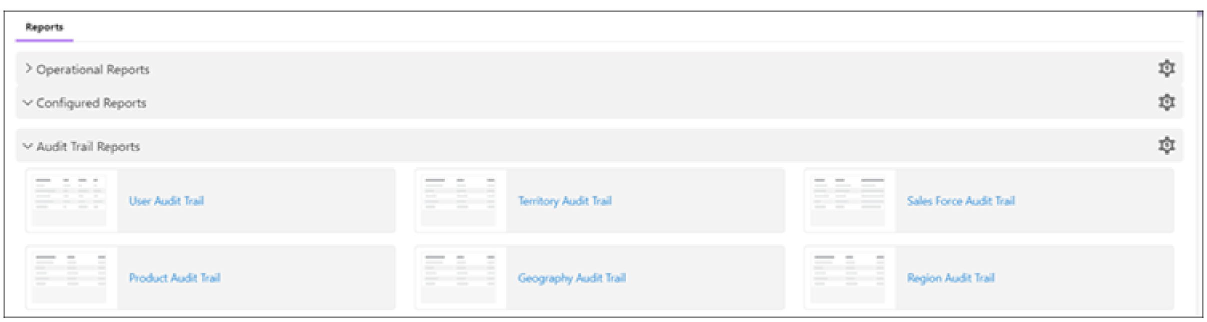


View the Sales Force Audit Trail Report

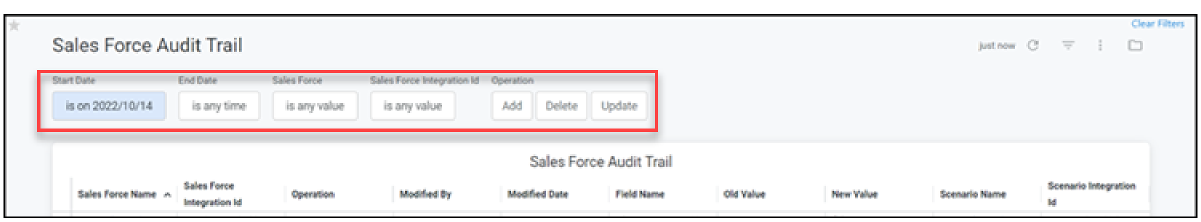
The Sales Force Audit Trail report includes details on field changes in the **Sales Forces** module, who made the change, and when the change was made.

To view the Sales Force Audit Trail report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Audit Trail Reports** section, click **Sales Force Audit Trail**.

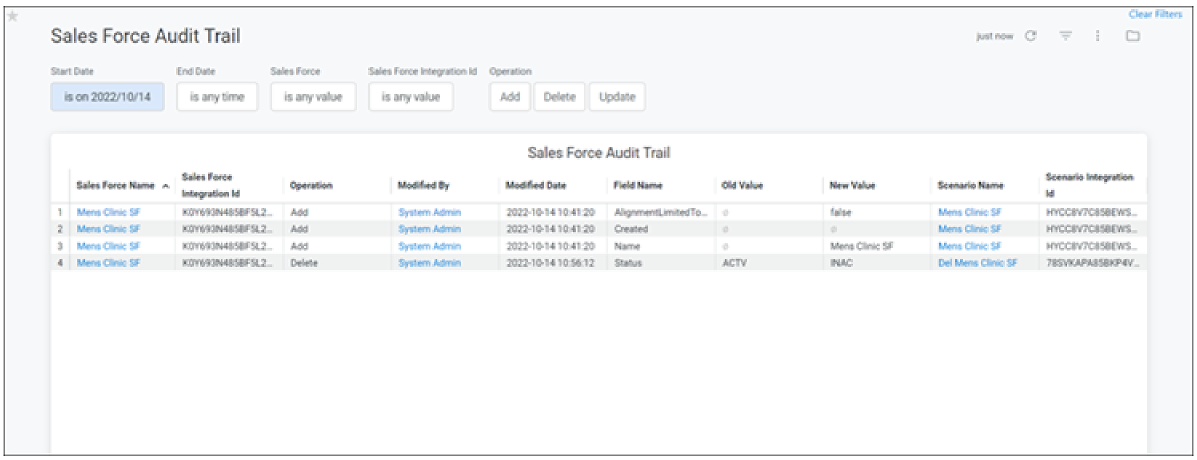


3. Enter the criteria for the report.



- **Start Date** and **End Date**: Select/enter the date(s) to display report data.
- **Sales Force Name**: Enter a sales force name to quickly select a sales force from the results list, or click to scroll and select the sales force(s) to view on the report.
- **Sales Force Integration Id**: Enter a sales force integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Operation**: Select *Add*, *Delete*, or *Update* to filter on a specific operation.

4. Click Load to view the report.



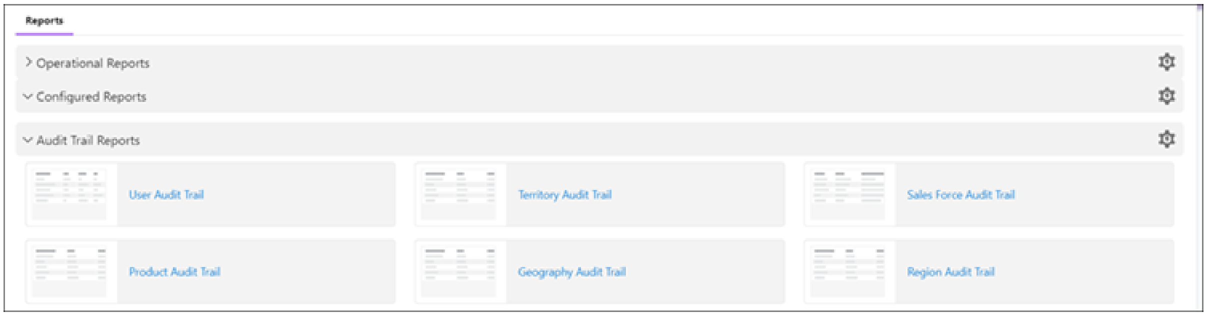
View the Product Audit Trail Report

The Product Audit Trail report includes details on field changes in the **Products** module, who made the change, and when the change was made.

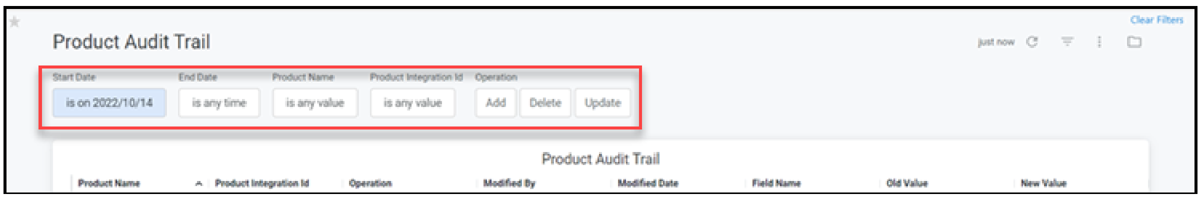
To view the Product Audit Trail report

1. Click **Reports** from the primary navigation bar.

2. From the **Reports** tab, in the **Audit Trail Reports** section, click **Product Audit Trail**.

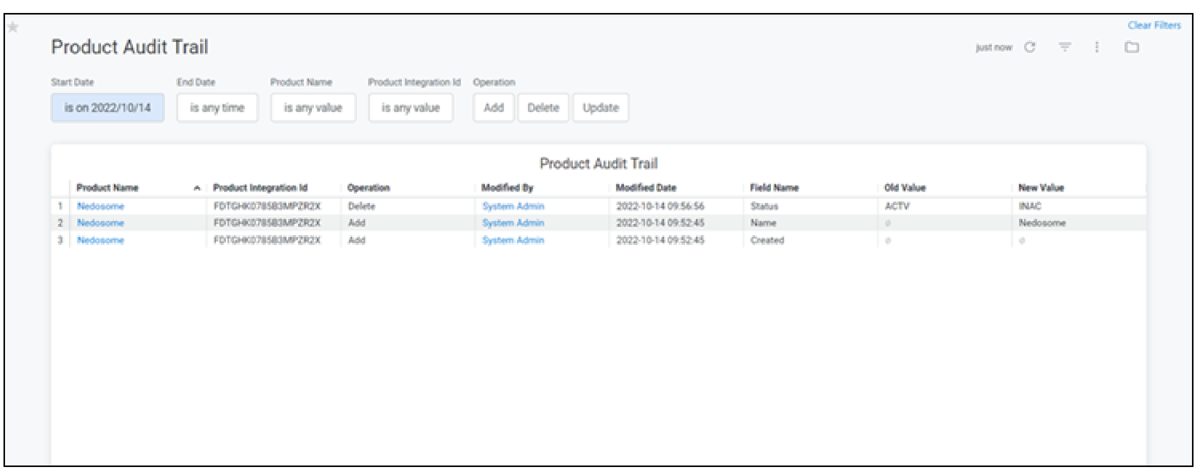


3. Enter the criteria for the report.



- **Start Date** and **End Date**: Select/enter the date(s) to display report data.
- **Product Name**: Enter a product name to quickly select a product from the results list, or click to scroll and select the product(s) to view on the report.
- **Product Integration Id**: Enter a product integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Operation**: Select *Add*, *Delete*, or *Update* to filter on a specific operation.

4. Click Load  to view the report.

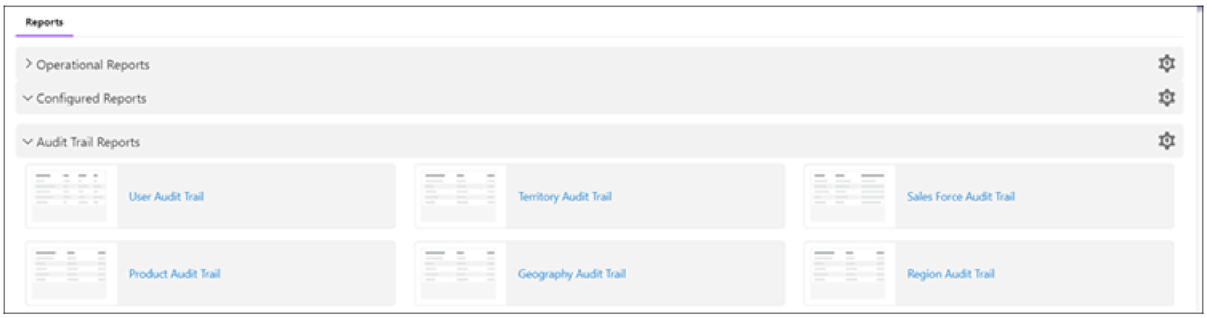


View the Geography Audit Trail Report

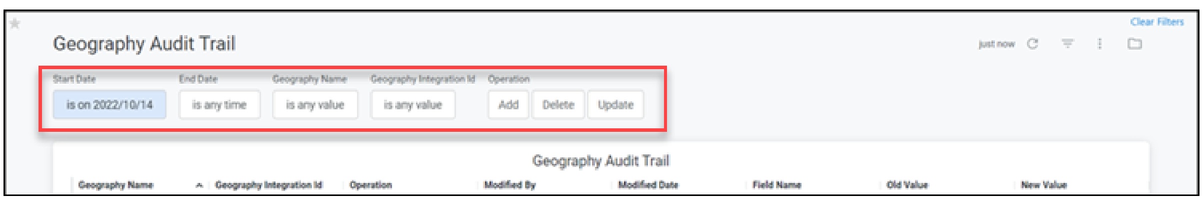
The Geography Audit Trail report includes details on field changes in the **Geographies** module, who made the change, and when the change was made.

To view the Geography Audit Trail report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Audit Trail Reports** section, click **Geography Audit Trail**.

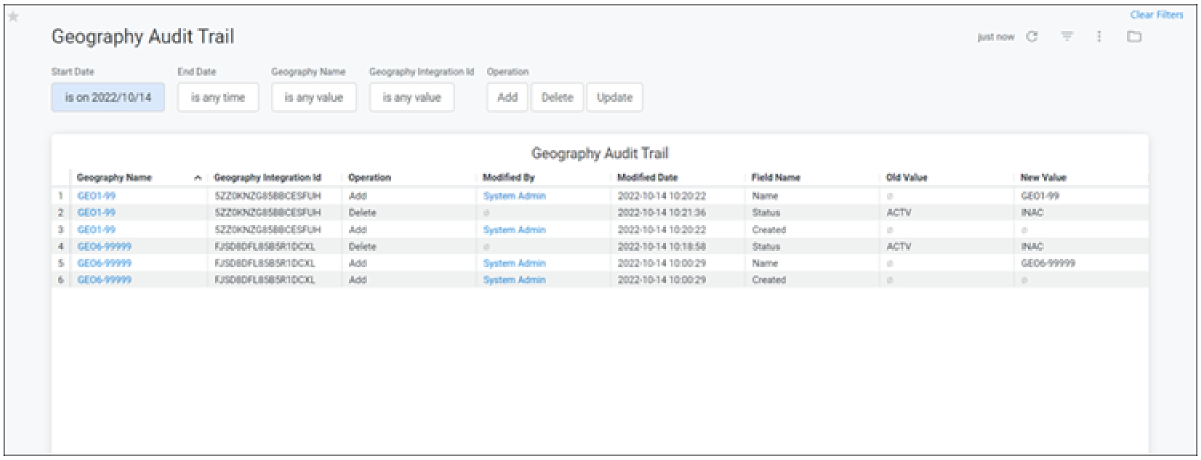


3. Enter the criteria for the report.



- **Start Date** and **End Date**: Select/enter the date(s) to display report data.
- **Geography Name**: Enter a geography name to quickly select a geography from the results list, or click ▾ to scroll and select the geography (s) to view on the report.
- **Geography Integration Id**: Enter a geography integration Id to quickly select an Id from the results list, or click ▾ to scroll and select the Id(s) to view on the report.
- **Operation**: Select *Add*, *Delete*, or *Update* to filter on a specific operation.

4. Click Load  to view the report.

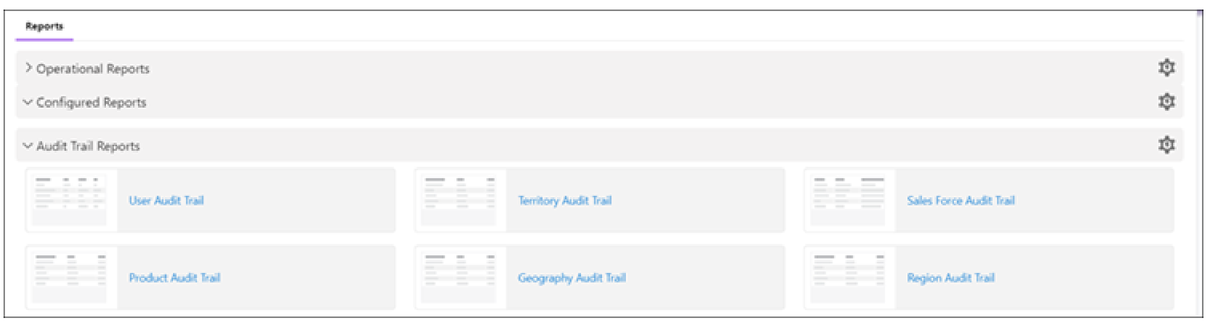


View the Region Audit Trail Report

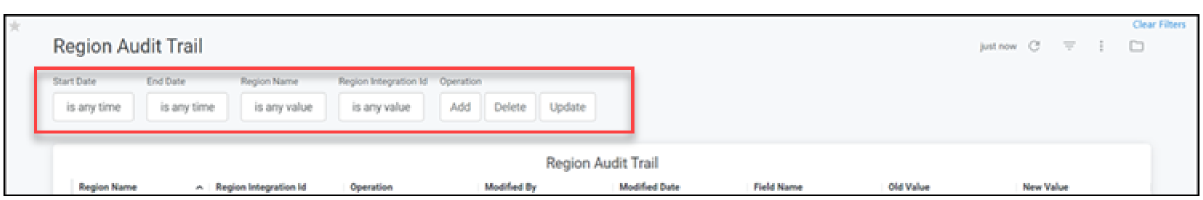
The Region Audit Trail report includes details on field changes in the **Regions** module, who made the change, and when the change was made.

To view the Region Audit Trail report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Audit Trail Reports** section, click **Region Audit Trail**.

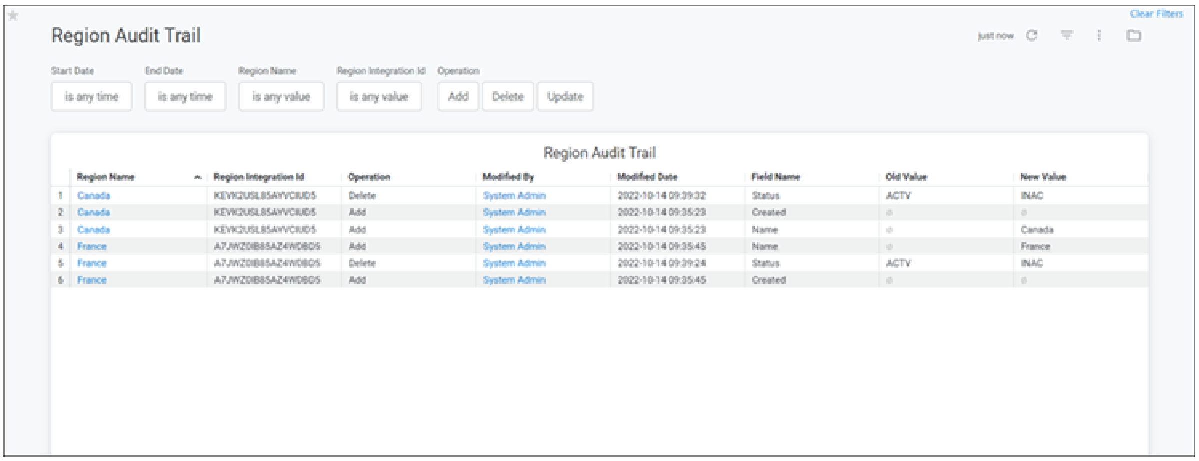


3. Enter the criteria for the report.



- **Start Date** and **End Date**: Select/enter the date(s) to display report data.
- **Region Name**: Enter a region name to quickly select a region from the results list, or click to scroll and select the region(s) to view on the report.
- **Region Integration Id**: Enter a region integration Id to quickly select an Id from the results list, or click to scroll and select the Id(s) to view on the report.
- **Operation**: Select *Add*, *Delete*, or *Update* to filter on a specific operation.

4. Click Load to view the report.

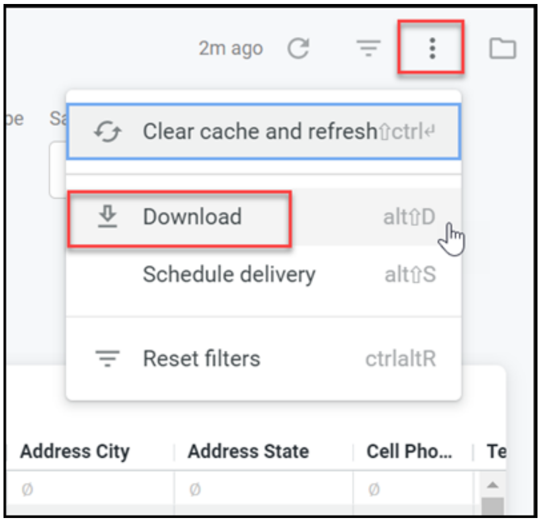


Export Report Results to CSV

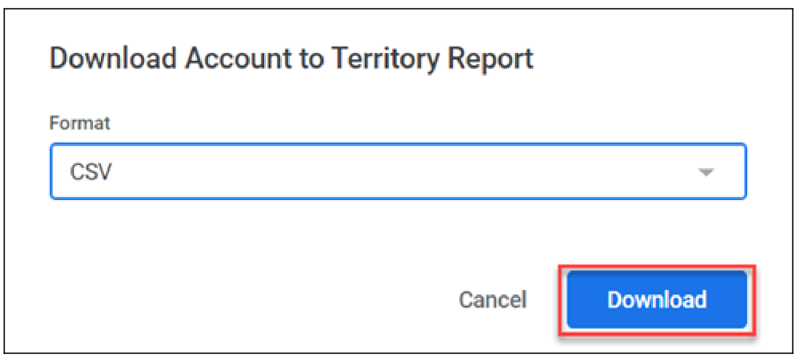
Once a report is run, you can export report results to a CSV file. A CSV file displays report data in text format separated by commas.

To export report results to CSV

1. From a report results page, click  and select **Download**.

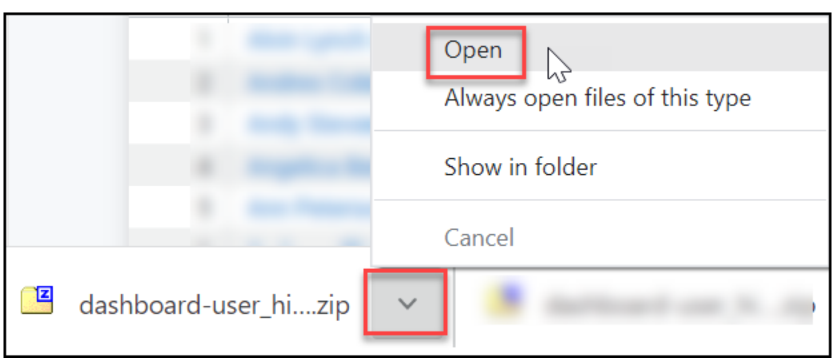


2. From the **Format** drop-down box, select **CSV**, then click **Download**.



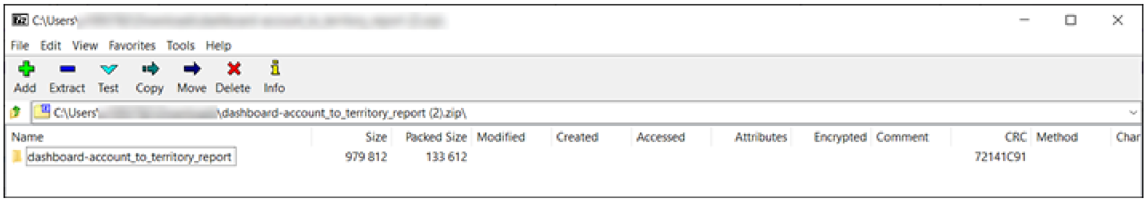
When the download is complete, the minimized file displays at the bottom left of the screen.

3. Click , then click **Open** to view the file.

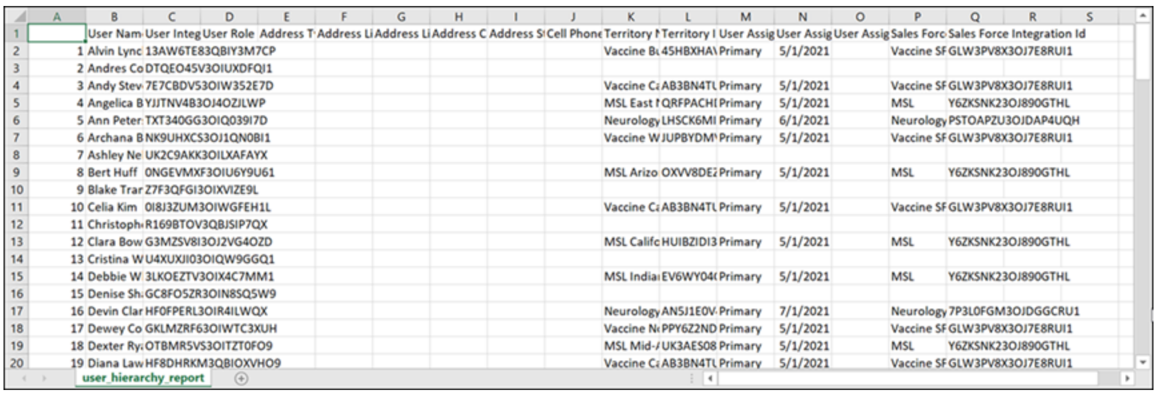


The downloaded file displays from the location in which it is stored.

4. Double-click the file name to open the file.



The report results display.



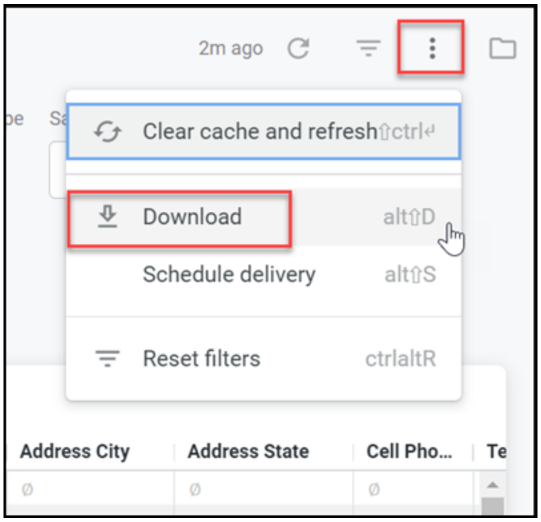
You can also export report results to PDF. See Export Report Results to PDF .

Export Report Results to PDF

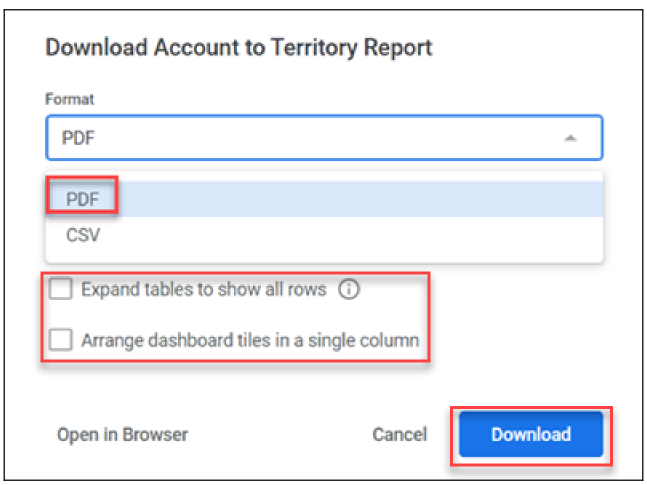
Once a report is run, you can export report results to a PDF file.

To export report results to PDF

1. From a report results page, click  and select **Download**.



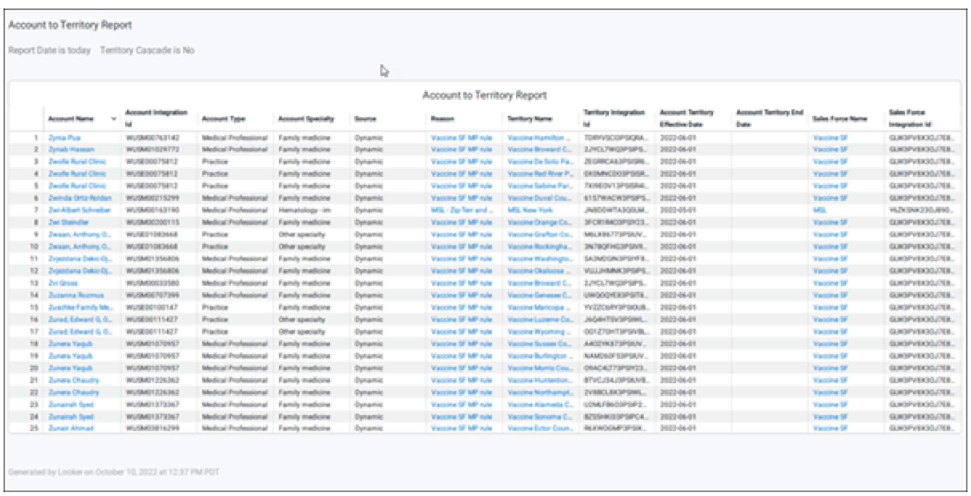
2. From the **Format** drop-down, select **PDF**. Select the paper size, and select or deselect the check boxes regarding row expansion and dashboard arrangement. Click **Download**.



A separate browser tab opens, showing the progress of the download.

3. Click , then click **Open** to view the file.

The report results display.



You can also export report results to CSV. See [Export Report Results to CSV](#).

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