

OCE Optimizer

March 2023

Optimizer

User Guide

For internal and external use

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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 <i>Current</i> 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.

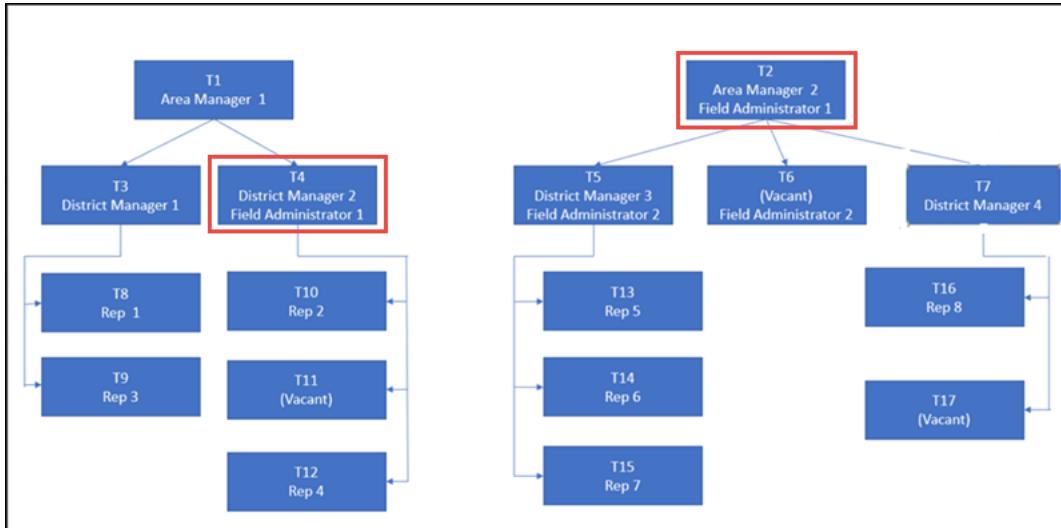
Note: For more information on enhancements to this release, access the OCE Optimizer March 2023 (R15) Release Notes.

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.

The image shows a login form with the following elements:

- Username:** A text input field with a placeholder.
- 2 Saved Usernames:** Text indicating saved usernames.
- Password:** A text input field with a placeholder.
- Log In:** A large blue button.
- Remember me:** A checked checkbox.
- Forgot Your Password?**: A link at the bottom.

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?**.

The screenshot shows the Salesforce login interface. It includes fields for 'Username' and 'Password', a 'Log In' button, a 'Remember me' checkbox, and a 'Forgot Your Password?' link which is highlighted with a red border.

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

The screenshot shows the 'Forgot Your Password' page. It contains instructions for logging in, a note about entering a Salesforce username, and a form for entering the username. At the bottom are 'Cancel' and 'Continue' buttons, with 'Continue' being highlighted with a red border.

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

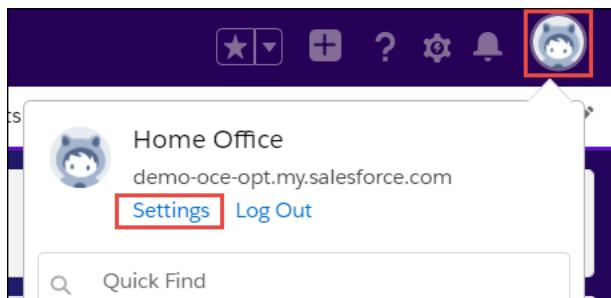
4. Answer the security question and click **Continue**.
5. Reset your password.

Change Your Password

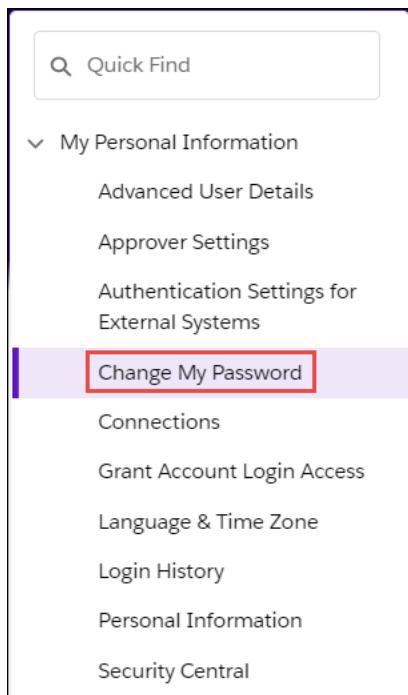
You can change your password, and the new password will be in effect the next time you log on. In addition, your password will expire after a specified number of days (as determined by your company), and you will be forced to change it.

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**.

Change My Password

Help for this Page

* Current Password

New Password

Confirm New Password

Security Question

In what city were you born?

Answer

Enter a new password for [redacted]. Make sure to include at least:

8 characters
 1 letter
 1 number

Save

Password was last changed on 10/29/2020, 5:37 PM.

- **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.

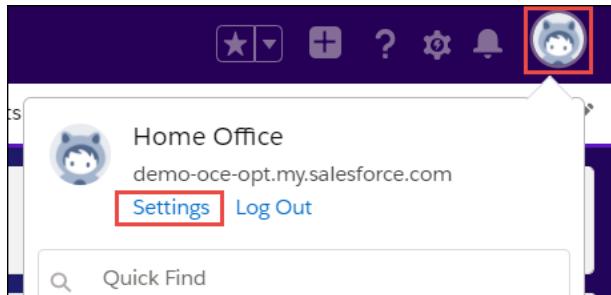
The next time you log on, your new password will be in effect.

Change the Language and Time Zone

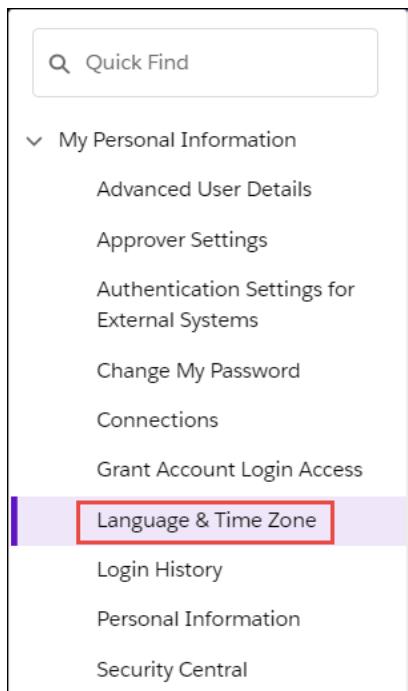
You can change your language preferences and time zone.

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**.

The screenshot shows the 'Language & Time Zone' settings page. At the top left is a gear icon. To its right is the title 'Language & Time Zone'. In the top right corner is a 'Help for this Page' link with a question mark icon. Below the title is a 'Settings' section with the following fields:

Time Zone	(GMT-05:00) Eastern Standard Time (America/New_York)
Locale	English (United States)
Language	English
Currency	USD - U.S. Dollar
Email Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

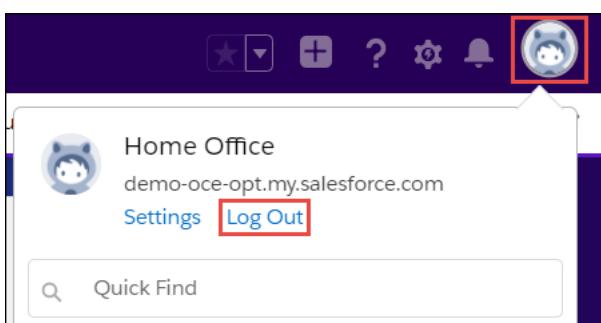
At the bottom of the settings section are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the OCE Optimizer application interface. At the top is a primary navigation bar with tabs for Scenarios, Territories, Users, Sales Forces, Products, Accounts, Account Rules, and More. To the right of the navigation bar is a search bar and a control panel with icons for favorite, help, notifications, profile, and log out. Below the navigation bar is a secondary navigation bar with a Territories icon and a search within module field. The main window displays a table of territory data with columns for Territory Name, Territory Integration Id, Territory Type, Sales Force Name, User Name, and Region Name. A search bar is located at the top of the main window table area. Red boxes and arrows highlight the following components:

- primary navigation bar**: The top horizontal bar with tabs.
- search**: The search bar in the top right corner.
- control panel**: The icons in the top right corner.
- search within a module**: The search bar within the main window table area.
- main window**: The central table displaying territory data.

Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name	Region Name
1 Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Self	US
2 Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales	Babs Steutly	US
3 Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Alisun Olohan	US
4 Delaware - Oncology Sales	100690000013130	Territory	Oncology Sales	Edward Earry	US
5 Maine - Diabetes Sales	100690000013205	Territory	Diabetes Sales	Tarah Kenelin	US
6 Maine - Oncology Sales	100690000013250	Territory	Oncology Sales	Farrel Terrett	US
7 Massachusetts - Diabetes Sales	100690000013265	Territory	Diabetes Sales	Taffy D'Elia	US
8 Massachusetts - Oncology Sales	100690000013190	Territory	Oncology Sales	Rory Swyndley	US
9 New Jersey - Diabetes Sales	100690000013235	Territory	Diabetes Sales	Leodora Rossin	US
10 New Jersey - Oncology Sales	100690000013145	Territory	Oncology Sales	Esme Battye	US
11 North East - Diabetes Sales	10000000148439	District	Diabetes Sales	Ab Rosenstein	US
12 North East - Oncology Sales	16193000018497	District	Oncology Sales	Hi Cella	US
13 North East Area	100691000027513	Area	Diabetes and Oncology	Papagena McCaughey	US

13 Records

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.

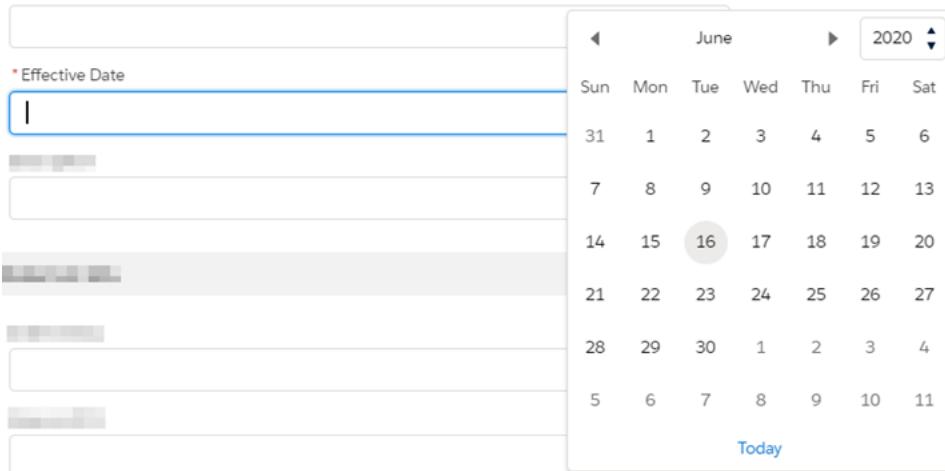
The application also contains common functions available in each module to aid in viewing information on the screen.

Some common types of data entry fields are:

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

* Region Name

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



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

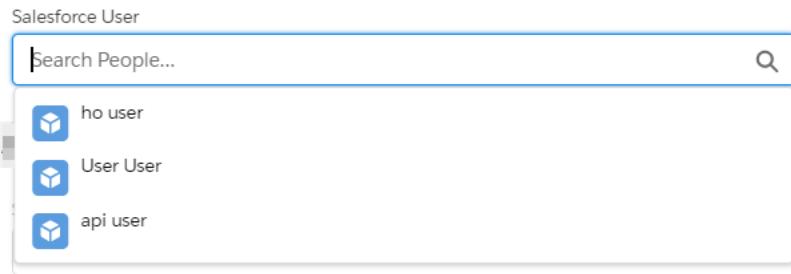
- **Pick-List:** Click the field and then select a value.

Sampling Status

Select an Option

- None--
- Eligible
- Ineligible
- Undefined
- Pending

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

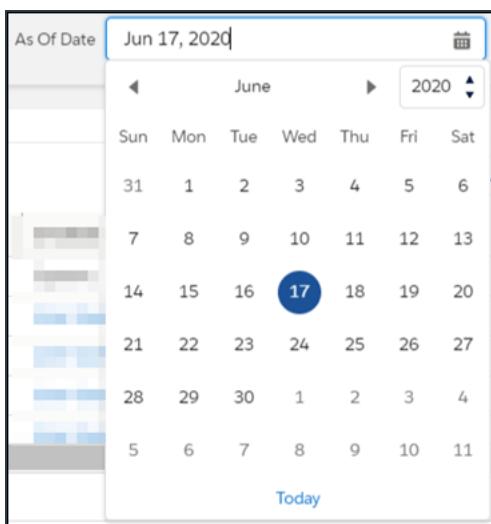
it will be or as it was on that date. You can change it to a future date, for example, to view the way your organization will look if you make certain organizational changes.

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.

The screenshot shows the OCE Optimizer search interface. The top navigation bar includes links for Scenarios, Territories, Users, Sales Forces, Products, Accounts, Account Rules, and More. A search bar at the top right contains the text "POST". The left sidebar, titled "Search Results", lists categories such as Geographies (5+), Files (4), Accounts (0), Scenarios (0), Territories (0), Products (0), Account Rules (0), Sales Forces (0), Users (0), Rule Fields (0), and Scenario Account Rules (0). The main content area displays two sections: "Geographies" and "Files". The "Geographies" section shows a list of geography names: POST-04735, POST-04734, POST-04733, POST-04732, and POST-04730. The "Files" section shows a list of four CSV files: Geography_Territory_Report_NI9HRQXQVHLE2VMHL.csv, Geography_Territory_Report_42969569X09XISNNT.csv, Geography_Territory_Report_TUBGABT5X06Z26RH5.csv, and Geography_Territory_Report_ACP4P1Z6VHJVCX77T.csv. Each file entry includes columns for Title, Size, File Type, Last Modified Date, and Owner.

Title	Size	File...	Last Modified Date	Owner
Geography_Territory_Report_NI9HRQXQVHLE2VMHL.csv	2KB	csv	6/11/2020, 3:35 PM	Home Office
Geography_Territory_Report_42969569X09XISNNT.csv	3KB	csv	6/16/2020, 2:37 PM	Home Office
Geography_Territory_Report_TUBGABT5X06Z26RH5.csv	3KB	csv	6/16/2020, 2:26 PM	Home Office
Geography_Territory_Report_ACP4P1Z6VHJVCX77T.csv	3888	csv	6/11/2020, 3:30 PM	Home Office

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.

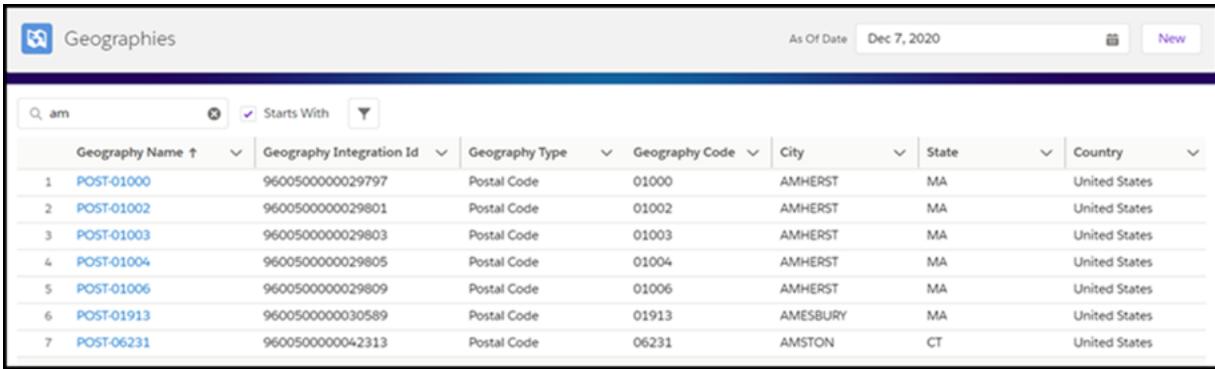
For example, to add the product Caronol to a territory, enter *Caronol* in **Search**, then select the appropriate product from the results.

The screenshot shows the 'Add Product to Territory' dialog box. At the top, there are three tabs: 'Products' (which is selected), 'To Territories', and 'Selection'. Below the tabs, a search bar contains 'Q, caronol' with a red box highlighting it. A checkbox labeled 'Starts With' is checked. To the right of the search bar is a magnifying glass icon. The main area is a grid table with the following columns: Product Name, Product Integration ID, Product Type, Region Name, Effective Date, and End Date. The grid displays five records for products starting with 'Caronol': Caronol, Caronol-100mg, Caronol-25mg, Caronol-50mg, and Caronol-75mg. At the bottom of the grid, it says '5 Records'. At the very bottom of the dialog box are 'Cancel' and 'Next' buttons.

The screenshot shows the 'Geographies' screen. At the top, there is a header with a location icon, the word 'Geographies', and a date field 'As Of Date' set to 'Dec 7, 2020'. There are also 'New' and 'Print' buttons. Below the header is a search bar with 'Q, Search...' and a 'Starts With' checkbox. The main area is a grid table with the following columns: Geography Name, Geography Integration Id, Geography Type, Geography Code, City, State, and Country. The grid displays 13 records for postal codes starting with 'POST'. At the bottom of the grid, it says '30+ Records'. The table has scroll bars on the right and bottom.

	Geography Name ↑	Geography Integration Id	Geography Type	Geography Code	City	State	Country
1	POST-00157	9600500000029191	Postal Code	00157	NA	MA	United States
2	POST-00158	9600500000029193	Postal Code	00158	NA	MA	United States
3	POST-01000	9600500000029797	Postal Code	01000	AMHERST	MA	United States
4	POST-01001	9600500000029799	Postal Code	01001	AGAWAM	MA	United States
5	POST-01002	9600500000029801	Postal Code	01002	AMHERST	MA	United States
6	POST-01003	9600500000029803	Postal Code	01003	AMHERST	MA	United States
7	POST-01004	9600500000029805	Postal Code	01004	AMHERST	MA	United States
8	POST-01005	9600500000029807	Postal Code	01005	BARRE	MA	United States
9	POST-01006	9600500000029809	Postal Code	01006	AMHERST	MA	United States
10	POST-01007	9600500000029811	Postal Code	01007	BELCHERTOWN	MA	United States
11	POST-01008	9600500000029813	Postal Code	01008	BLANDFORD	MA	United States
12	POST-01009	9600500000029815	Postal Code	01009	BONDSVILLE	MA	United States
13	POST-01010	9600500000029817	Postal Code	01010	BRIMFIELD	MA	United States

2. View the search results.



The screenshot shows a search results table titled "Geographies". At the top, there is a search bar with the placeholder "Search" and a filter dropdown set to "Starts With". The table has columns: Geography Name, Geography Integration Id, Geography Type, Geography Code, City, State, and Country. The data is as follows:

	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**.

The screenshot shows the 'Filters' screen with several input fields and dropdowns. The 'Product Type' dropdown is set to 'Brand'. The 'Region' dropdown has 'US' selected. The 'Parent Product' search field contains 'Cardiology'. There are also sections for 'Ignore Dates/Show All', 'Product Hierarchy', and 'Child Product'.

Select the appropriate product from the results.

The screenshot shows the 'Add Product to Territory' screen. It displays a table with one record: Cardiology, Product ID 16474000000112, Type Brand, Region US, and Effective Date 1/1/2020. The 'Parent Product' column shows 'Cardiology' with a delete icon.

Product Name	Product Integration Id	Region	Parent Product
Cardiology	16474000000112	US	Cardiology

Territories						As Of Date	Nov 11, 2020	Print
Search...		<input checked="" type="checkbox"/> Starts With						
	Territory Name ↑ ↓	Territory Integr...	Territory Type	Sales Force Na...	User Name	Region Name		
1	Connecticut - Diabetes	100690000010596	Territory	Diabetes Sales	Kirby Seif	US		
2	Connecticut - Oncology	100690000013175	Territory	Oncology Sales	Babs Steutly	US		
3	Delaware - Diabetes Sal	100690000013295	Territory	Diabetes Sales	Alisun Olohan	US		
4	Delaware - Oncology Sa	100690000013130	Territory	Oncology Sales	Edward Earry	US		

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

Filters

Scenario Status	Scenario Name
Select an Option	<input type="text"/>
Scenario Type	Region
Select an Option	<input type="text"/> Search Regions... <input type="button" value="🔍"/>
Scenario Effective Start Date	Scenario Effective End Date
<input type="button" value="📅"/>	<input type="button" value="📅"/>
Scenario Commit Start Date	Scenario Commit End Date
<input type="button" value="📅"/>	<input type="button" value="📅"/>
Created By	
<input checked="" type="radio"/> Me	<input type="radio"/> Anyone
<input type="button" value="✖ Clear Filters"/> <input type="button" value="Cancel"/> <input type="button" value="Run"/>	

- **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

Filters

Territory Name	Territory Integration Id
<input type="text"/>	<input type="text"/>
Territory Type	User
<input type="text" value="Select an Option"/> ▼	<input type="text" value="Search Users..."/> 🔍
Salesforce	Region
<input type="text" value="Search Sales Forces..."/> 🔍	<input type="text" value="Search Regions..."/> 🔍
<input type="checkbox"/> Vacant	<input type="checkbox"/> Ignore As of Date
Clear Filters Run	

- **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

Filters

User Name	User Integration Id
<input type="text"/>	<input type="text"/>
Territory	Territory Type
<input type="text"/> Search Territories... <input type="button" value="🔍"/>	<input type="button" value="Select an Option"/>
Sales Force	Region
<input type="text"/> Search Sales Forces... <input type="button" value="🔍"/>	<input type="text"/> Search Regions... <input type="button" value="🔍"/>
<input type="checkbox"/> Unassigned <input type="checkbox"/> Ignore As of Date	

- **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

Filters

Sales Force Name	Sales Force Integration Id
<input type="text"/>	<input type="text"/>
Region	<input type="checkbox"/> Ignore As of Date
<input type="text"/> Search Regions... 	
<input type="button" value="Clear Filters"/> <input type="button" value="Cancel"/> <input type="button" value="Run"/>	

- **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

Filters

Product Name	Product Integration Id				
<input type="text"/>	<input type="text"/>				
Product Type	Region				
<input type="text"/> Select an Option 	<input type="text"/> Search Regions... 				
<input type="checkbox"/> Ignore As of Date					
Product Hierarchy <table border="1"> <tr> <td>Parent Product</td> <td>Child Product</td> </tr> <tr> <td><input type="text"/> Search Products... </td> <td><input type="text"/> Search Products... </td> </tr> </table>		Parent Product	Child Product	<input type="text"/> Search Products... 	<input type="text"/> Search Products... 
Parent Product	Child Product				
<input type="text"/> Search Products... 	<input type="text"/> Search Products... 				
<input type="button" value="Clear Filters"/> <input type="button" value="Cancel"/> <input type="button" value="Run"/>					

- **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

Filters

Account Name	Account Integration Id
Account Type	Account Specialty
Select an Option	Select an Option
Address Type	City
Select an Option	
State Code	Postal Code
Select an Option	
Region	* Status
Search Regions...	Active
Affiliations	
Affiliated To - Account Name (Upward)	Affiliated To - Account Integration Id (Upward)
Select an Option	
Affiliated To - Account Type (Upward)	Affiliation From - Account Name (Downward)
Select an Option	
Affiliation From - Account Integration Id (Downward)	Affiliation From - Account Type (Downward)
Select an Option	Select an Option
Affiliation Roles	Affiliation Specialty
Select an Option	Select an Option

Buttons:

- Clear Filters
- Cancel
- Run

- **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

The screenshot shows a 'Filters' dialog box with the following structure:

- Search Regions...**: A text input field with a magnifying glass icon.
- Affiliations**: A section with the following fields:
 - Affiliated To - Account Name (Upward)**: Text input field.
 - Affiliated To - Account Integration Id (Upward)**: Text input field.
 - Affiliated To - Account Type (Upward)**: A dropdown menu labeled "Select an Option".
 - Affiliation From - Account Name (Downward)**: Text input field.
 - Affiliation From - Account Integration Id (Downward)**: Text input field.
 - Affiliation From - Account Type (Downward)**: A dropdown menu labeled "Select an Option".
 - Affiliation Roles**: A dropdown menu labeled "Select an Option".
 - Affiliation Specialty**: A dropdown menu labeled "Select an Option".
- Buttons**: "Clear Filters" (blue button with a circular icon), "Cancel" (white button), and "Run" (purple button).

- **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

Filters

Name	Sales Force
<input type="text"/>	<input type="text" value="Search Sales Forces..."/> 
Region	<input type="checkbox"/> Ignore As of Date
<input type="text" value="Search Regions..."/> 	
<input type="button" value="Clear Filters"/> <input type="button" value="Cancel"/> <input type="button" value="Run"/>	

- **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

Filters

Account Product Rule Name	Sales Force
<input type="text"/>	<input type="text" value="Search Sales Forces..."/> 
<input type="checkbox"/> Ignore As of Date	
<input type="button" value="Clear Filters"/> <input type="button" value="Cancel"/> <input type="button" value="Run"/>	

- **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

Filters

Geography Code	Geography Integration Id
<input type="text"/>	<input type="text"/>
Geography Type	City
<input type="text"/> Select an Option ▼	<input type="text"/>
State	Region
<input type="text"/>	<input type="text"/> Search Regions... Q
Territory	Territory Type
<input type="text"/> Search Territories... Q	<input type="text"/> Select an Option ▼
<input type="checkbox"/> Unassigned Geography	<input type="checkbox"/> Ignore As of Date
✖ Clear Filters Cancel Run	

- **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

The screenshot shows a 'Filters' dialog box for 'Regions'. It contains two input fields: 'Region Name' and 'Region Integration Id'. Below these is a checkbox labeled 'Ignore As of Date'. At the bottom are three buttons: 'Clear Filters' (with a cancel icon), 'Cancel', and a purple 'Run' button.

- **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

The screenshot shows a 'Filters' dialog box for 'Engagement Plans'. It has four input fields: 'Engagement Plan Name', 'Sales Force Name' (with a search bar and magnifying glass icon), 'Region Name' (with a search bar and magnifying glass icon), and a checkbox labeled 'Ignore As of Date'. At the bottom are three buttons: 'Clear Filters' (with a cancel icon), 'Cancel', and a purple 'Run' button.

- **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:

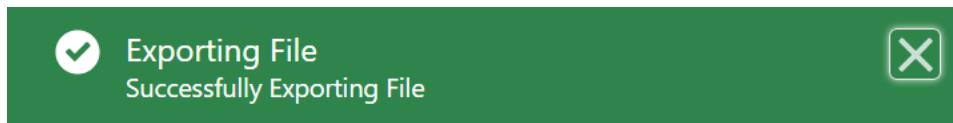
- Territories
- Users

- 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.

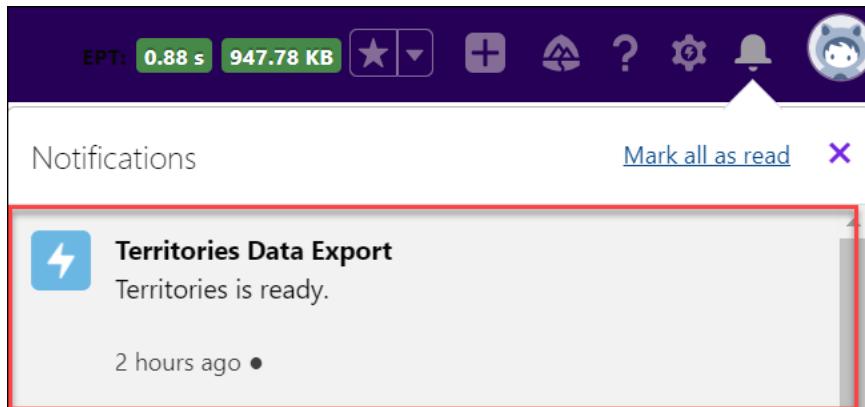
To export data into a CSV file

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.

The screenshot shows a report export interface. At the top, it displays the file name: Territories_MQMGBT6N61EOYEGEAX.csv. Below this, it shows the export status as 'Completed', process start time as '2/8/2022, 1:08 PM', and process end time as '2/8/2022, 1:08:34 PM'. The 'Details' section includes fields for File Name (Territories_MQMGBT6N61EOYEGEAX.csv), Object Name (OCEOTEST_DMVTerritory_c), Process Start Time (2/8/2022, 1:08 PM), and Process End Time (2/8/2022, 1:08 PM). There are sections for 'Additional Details' and 'Audit Information'. A 'Filters' bar shows 'Start Date' as 2/8/2022 and 'End Date' as 2/8/2022. The 'Files (3)' section lists three CSV files: Territories_MQMGBT6N61EOYEGEAX_2.csv (32KB), Territories_MQMGBT6N61EOYEGEAX_1.csv (180KB), and Territories_MQMGBT6N61EOYEGEAX.csv (88KB). An 'Add Files' button is located at the top right of the file list.

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

This screenshot shows the 'Files (3)' section from the previous interface. It lists three CSV files: Territories_MQMGBT6N61EOYEGEAX_2.csv, Territories_MQMGBT6N61EOYEGEAX_1.csv, and Territories_MQMGBT6N61EOYEGEAX.csv. The first file, Territories_MQMGBT6N61EOYEGEAX_2.csv, is highlighted with a red box. An 'Add Files' button is located at the top right of the list.

To bulk export data into an .xlsx file

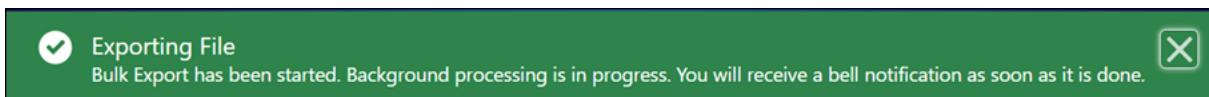
- Click **Bulk Export**.

The screenshot shows the 'Bulk Export' interface. At the top, it says 'Bulk Export'. Below this is a search bar with a placeholder 'Search...' and a 'Starts With' checkbox. The main area is a table with columns: User Name, User Integration, User Type, Territory Name, Territory Integration, and Sales Force. The table lists ten users:

User Name	User Integration	User Type	Territory Name	Territory Integration	Sales Force
Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF
Andres Cobb	DTQEO45V3OIUXDF...	Field Sales			
Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF
Angelica Bennett	YJJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL
Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6M13RUKAIOF...	Neurology
Archana Bhatt	NK9UHXCS3OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF
Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales			
Bert Huff	ONGEVMXF3OIU6Y9...	Field Sales	MSL Arizona	OXVV8DEZ3Q0LMS7...	MSL
Blake Tran	Z7F3QFGI3OIXVIZE9L	Field Sales			

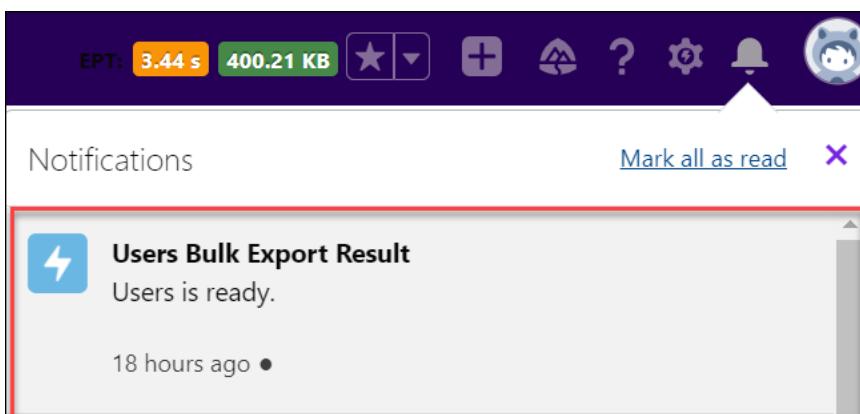
At the bottom, there are buttons for 'Cancel', 'Export Selected', and 'Export All'.

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.

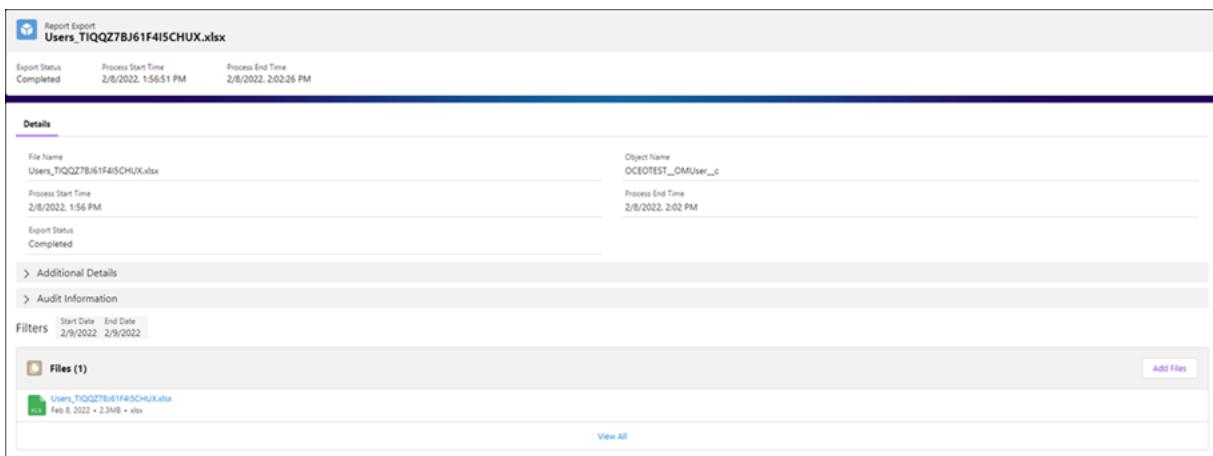


When the process completes, a notification displays in the upper-right corner of the screen.

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.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	Territories																					
2	Action/Act Type/Ter	Ter	Description	ShortName	SubType/T	EffectiveD	EndDate/E	RefRegion	Region/Ln	ExternalId	AddressLn	AddressLn	AddressLn									
3	DIST	MSL	Alabama			2021-05-0	3999-12-3	US	10002000000107												City/City	State/Stat-ZipCode/Z Extension/ CC
4																						
5																						
6																						
7																						
8																						
9																						
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The **Picklists** tab contains code descriptions used in the template.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Entity	Field	Code	Description													
2	Account Exclusions	Purpose	ALGN	Alignment													
3	Account Exclusions	Purpose	COMP	Compensation													
4	Account Explicits	Purpose	ALGN	Alignment													
5	Account Explicits	Purpose	COMP	Compensation													
6	Account Sales Force Exclusions	Purpose	ALGN	Alignment													
7	Account Sales Force Exclusions	Purpose	COMP	Compensation													
8	Geography Territories	Purpose	COMP	Compensation													
9	Geography Territories	Purpose	SFA	SFA													
10	Geography Territories	Source	EXPL	Explicit													
11	Product Sales Forces	Product Alignment Type	DETL	Detail													
12	Product Sales Forces	Product Alignment Type	MIRF	MIRF													
13	Product Sales Forces	Product Alignment Type	PROM	Promotional Material													
14	Product Sales Forces	Product Alignment Type	RATE	Ratings													
15	Product Sales Forces	Product Alignment Type	SMOD	Sample Order													
16	Product Sales Forces	Product Alignment Type	SMPL	Sample													
17	Product Sales Forces	Product Alignment Type	SPDA	Sales													
18	Product Territory Exclusions	Product Alignment Type	DETL	Detail													
19	Product Territory Exclusions	Product Alignment Type	MIRF	MIRF													
20	Product Territory Exclusions	Product Alignment Type	PROM	Promotional Material													
21	Product Territory Exclusions	Product Alignment Type	RATE	Ratings													
22	Product Territory Exclusions	Product Alignment Type	SMOD	Sample Order													
23	Product Territory Exclusions	Product Alignment Type	SMPL	Sample													
24	Product Territory Exclusions	Product Alignment Type	SPDA	Sales													
25	Product Territory Explicits	Product Alignment Type	DETL	Detail													
26	Product Territory Explicits	Product Alignment Type	MIRF	MIRF													
27	Product Territory Explicits	Product Alignment Type	PROM	Promotional Material													
28	Product Territory Explicits	Product Alignment Type	RATE	Ratings													
29	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

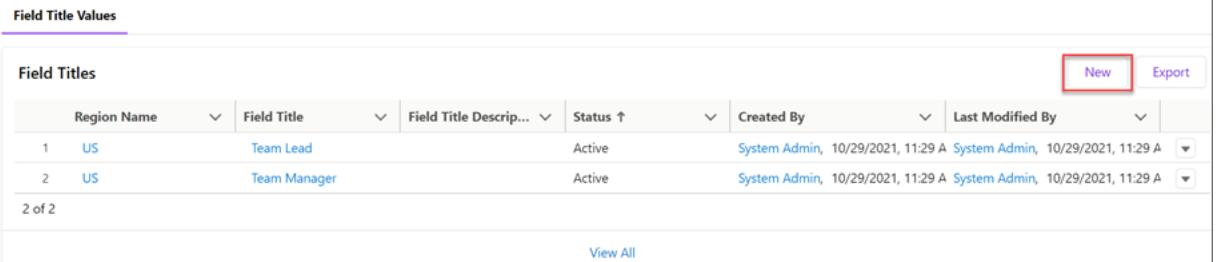
HO Super Users and administrators can create User Field Titles.

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

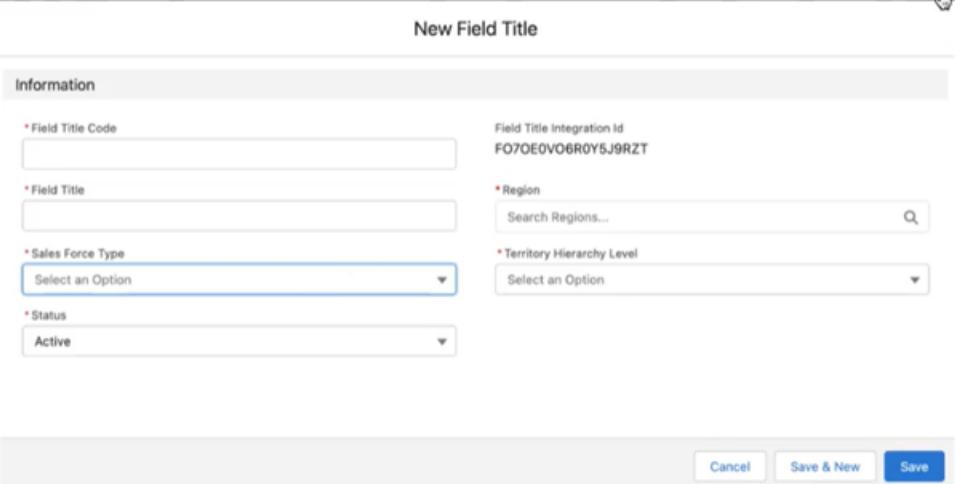
1. Click **Configurations Home Office** from the primary navigation bar.

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



Field Title Values						
Field Titles						
Region Name	Field Title	Field Title Descrip...	Status ↑	Created By	Last Modified By	
1 US	Team Lead		Active	System Admin, 10/29/2021, 11:29 A	System Admin, 10/29/2021, 11:29 A	View
2 US	Team Manager		Active	System Admin, 10/29/2021, 11:29 A	System Admin, 10/29/2021, 11:29 A	View
2 of 2		View All				

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



The dialog box has the following fields:

- Field Title Code:**
- Field Title Integration Id:** FO7OE0VO6R0Y5J9RZT
- Field Title:**
- Region:** Search Regions...
- Sales Force Type:**
- Territory Hierarchy Level:**
- Status:**

Buttons at the bottom:

- Cancel
- Save & New
- Save

- 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.

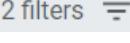
View Dashboard

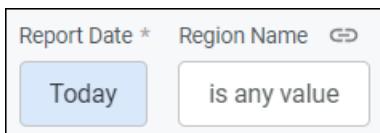
An HO user can have operational insight by viewing the accounts gained and lost for a region for a rolling 30-day period. The user can also drill down on specific days and see what happened to a specific account and/or territory.

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.



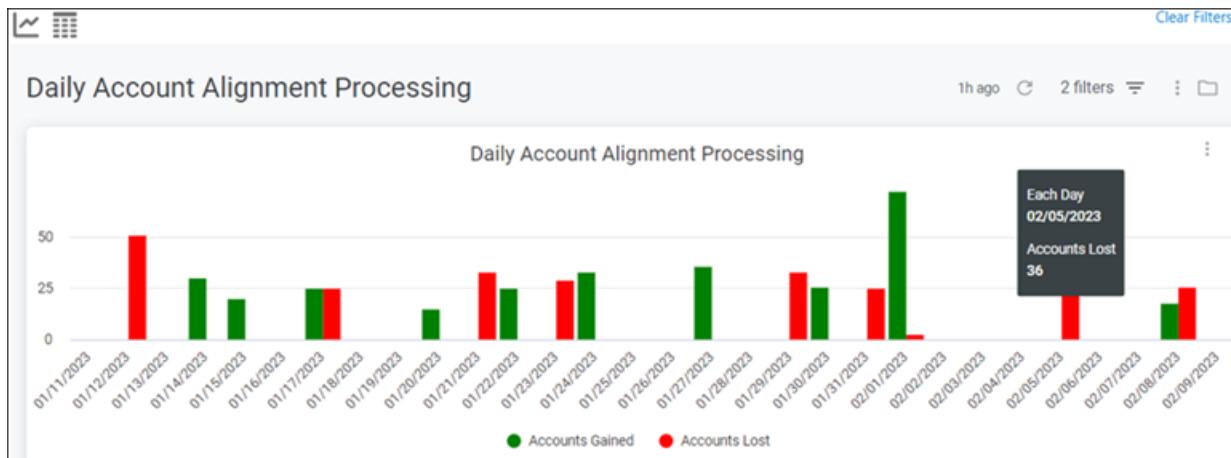
The screenshot shows a filter interface with two fields: 'Report Date *' and 'Region Name'. Below each field is a button: 'Today' under 'Report Date' and 'is any value' under 'Region Name'. There is also a link icon between the two fields.

- 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.

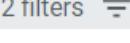
The Column Chart displays data for a rolling 30 days, using two bar charts.

- **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 . The filters **Report Date** and **Region Name** appear on the left.

Report Date * Region Name 

Today is any value

- 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 screenshot shows a grid view titled "Daily Account Alignment Processing". The top navigation bar includes "Clear Filters", a refresh icon, and a timestamp "1h ago". Below the title, there are filter and export icons. The main grid has three columns: "Each Day", "Accounts Gained", and "Accounts Lost". The data rows show the following information:

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

3.

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](#).

	Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name
1	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Seif
2	Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales	Babs Steutly
3	Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Alisun Olohan
4	Delaware - Oncology Sales	100690000013130	Territory	Oncology Sales	Edward Earry
5	Maine - Diabetes Sales	100690000013205	Territory	Diabetes Sales	Tarah Kenelin
6	Maine - Oncology Sales	100690000013250	Territory	Oncology Sales	Farrel Terrett
7	Massachusetts - Diabetes Sales	100690000013265	Territory	Diabetes Sales	Taffy D'Elia
8	Massachusetts - Oncology Sales	100690000013190	Territory	Oncology Sales	Rory Swyndley
9	New Jersey - Diabetes Sales	100690000013235	Territory	Diabetes Sales	Leodora Rossin
10	New Jersey - Oncology Sales	100690000013145	Territory	Oncology Sales	Esme Battye
11	North East - Diabetes Sales	10000000148439	District	Diabetes Sales	Ah Runcinate

13 Records

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.

As Of Date	Dec 8, 2020	
------------	-------------	--

Highlight Section

Territory		As Of Date		
New Jersey - Diabetes Sales		Dec 8, 2020		
Territory Integration Id	Territory Type	Sales Force Name	Effective Date	End Date
100690000013235	Territory	Diabetes Sales	1/1/2020	

- 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 New Jersey - Diabetes Sales					As Of Date	Dec 8, 2020	
Territory Integration Id 100690000013235	Territory Type Territory	Sales Force Name Diabetes Sales	Effective Date 1/1/2020	End Date			
Details Account Alignments Geography Alignments Product Alignments Details History-Time More▼							
Territory Name New Jersey - Diabetes Sales			Territory Integration Id 100690000013235				
Effective Date 1/1/2020			End Date				
Territory Type Territory			Short Name				
Region US							

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

Details	Account Alignments	Geography Alignments	Product Alignments	Details History-Time	Alignments History-Time	Hierarchy	Map View
Territory Name New Jersey - Diabetes Sales				Territory Integration Id 100690000013235			
Effective Date 1/1/2020				End Date			
Territory Type Territory				Short Name			
Region US							

- **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 IDs	
External ID1 70000000090067	External ID2
External ID3	External ID4
External ID5	

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

Audit Information

Audit Information	
Created By System, 11/6/2020, 12:08 PM	Last Modified By System, 11/6/2020, 12:08 PM

- **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 Assignments								New	Export
User Name	User Integratio...	User Type	Assignment Type	Is Pending	Sales Force Name	Sales Force Inte...	Effectiv		
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Administrator	✓	Vaccine SF	GLW3PV8X3OJ7E8RUI1	8/1/202		
1 Records									
View All									

- **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 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							

- **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 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						

- **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	

- **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, :

- **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.

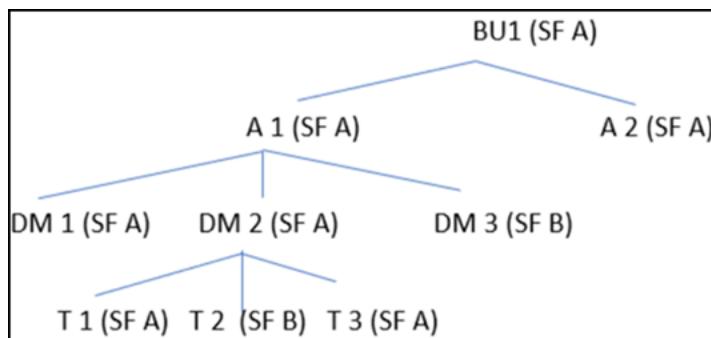
Territory Account Alignments Tab

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

Manager Roll-up Account Alignments									<input type="text" value="Search..."/>	<input checked="" type="checkbox"/> Starts With	<input type="button" value="Export"/>
Account Name	Account Integration Id	Account Type	Account Specialty	Territory Name	Territory Integration Id	Effective Date	End Date				
1 Brian Adler	WUSM00295004	Medical Professional	Hematology - im	MSL Alabama	6CZV1TZK3Q0LM578LS	5/1/2021					
2 Chang-Kon Jin	WUSM00231134	Medical Professional	Hematology - im	MSL Alabama	6CZV1TZK3Q0LM578LS	5/1/2021					
3 Charlie Scott	WUSM0121655	Medical Professional	Hematology - im	MSL Alabama	6CZV1TZK3Q0LM578LS	5/1/2021					
4 Frank Bailey	WUSM00561165	Medical Professional	Hematology - im	MSL Alabama	6CZV1TZK3Q0LM578LS	5/1/2021					
5 Frederick Goldman	WUSM00754738	Medical Professional	Hematology - im	MSL Alabama	6CZV1TZK3Q0LM578LS	5/1/2021					
6 [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]				
10 of 21											
View All											

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								
	Account Name	Account Integration Id	Account Type	Account Specialty	Source	Reason	Effective Date	End Date
1	Allison 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								
	Account Name	Account Integration Id	Account Type	Account Specialty	Effective Date	End Date	Created By	Last Modified By
1	BENAMIN JOEL SWISHER	0013h00000fmrVAAJ	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	0013h00000fmrVAAAZ	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

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		0013h000000f0mVAAJ		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		0013h000000fmWAAZ		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 explicitly. 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							<input type="button" value="Search..."/>	<input checked="" type="checkbox"/> Starts With	<input type="button" value="▼"/>	<input type="button" value="Export"/>
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.

Account Product Territory Restrictions							
	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.

- **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

Account Product Territory Restrictions Explicit							
	Search...	<input checked="" type="checkbox"/> Starts With					
	Product Name ↑ ↓	Product Integrat...	Product Type	Account Name	Account Integrat...	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.

- **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							
	Product Name	Product Integration Id	Product Type	Product Alignment Type	Source	Effective Date	End Date
1	ProductB	JAGT33W5K42YBDFT	Detail	Detail	Explicit	12/7/2021	12/27/2021
2	ProductA	706VB9PF5K42F094S9	Brand	Detail	Explicit	12/7/2021	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 Alignments Exclusion						Hierarchy	Export
	Product Name	Product Integration Id	Product Type	Product Alignment Type	Effective Date	End Date	
1	Baconopen	10000000088942	Detail	Sample	8/7/2020		
1 Records							
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 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 Alignments Explicit						Hierarchy	Export
	Product Name	Product Integration Id	Product Type	Product Alignment Type	Effective Date	End Date	
1	Arhimed	100799000000368	Detail	Sales	8/7/2020		
1 Records							
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 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

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.

User Assignments

User Assignments						
User Name	User Integratio...	User Type	Assignment Type	Is Pending	Sales Force Name	Sales Force Inte...
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Administrator	✓	Vaccine SF	GLW3PV8X3OJ7E8RU11 8/1/202
1 Records						
View All						

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*.

Field Titles						
Field Title	Field Title Reason	Effective Date	End Date	Created By	Last Modified By	
1 home office, HQ	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 [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

Manager Roll-up Account Alignments								
Account Name	Account Integration Id	Account Type	Account Specialty	Territory Name	Territory Integration Id	Effective Date	End Date	Export
1 Brian Adler	WUSM00295004	Medical Professional	Hematology - im	MSL Alabama	6CZ1TZK3Q0LMS7BL5	5/1/2021		
2 Chang-Kon Jin	WUSM00231134	Medical Professional	Hematology - im	MSL Alabama	6CZ1TZK3Q0LMS7BL5	5/1/2021		
3 Charlie Scott	WUSM03121655	Medical Professional	Hematology - im	MSL Alabama	6CZ1TZK3Q0LMS7BL5	5/1/2021		
4 Frank Bailey	WUSM00561165	Medical Professional	Hematology - im	MSL Alabama	6CZ1TZK3Q0LMS7BL5	5/1/2021		
5 Frederick Goldman	WUSM00754738	Medical Professional	Hematology - im	MSL Alabama	6CZ1TZK3Q0LMS7BL5	5/1/2021		
6 Jerson Khoury	WUSM00754738	Medical Professional	Hematology - im	KAEZ Alabama	6CZ1TZK3Q0LMS7BL5	5/1/2021		
10 of 21								

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									Export
	Account Name	Account Integration Id	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		
10 of 20									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
	Account Name	Account Integration Id	Account Type	Account Specialty	Effective Date	End Date	Created By	Last Modified By	
1	BENJAMIN JOEL SWISHER	0013h00000fimvAAJ	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	0013h00000fimvAAZ	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
	Account Name	Account Integration Id	Account Type	Account Specialty	Effective Date	End Date	Created By	Last Modified By	
1	BENJAMIN JOEL SWISHER	0013h00000fimvAAJ	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	0013h00000fimvAAZ	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.

Account Territory Owner Indicator								Export
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.

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 Integrat... ↓ ↑	Product Type ↓ ↑	Account Name ↓ ↑	Account Integrat... ↓ ↑	Account Type ↓ ↑
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 Integrat... ↓ ↑	Product Type ↓ ↑	Account Name ↓ ↑	Account Integrat... ↓ ↑	Account Type ↓ ↑
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

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						

For a description of the fields displayed in the **Geography Alignments** section, see [Geography Alignments in the Territory Geography Alignments Tab](#).

Product Alignments

Product Alignments						
	Product Name	Product Integration Id	Product Type	Product Alignment Type	Source	Effective Date
1	ProductB	JAJGT33W5K42YBDF	Detail	Detail	Explicit	12/7/2021
2	ProductA	7G6VB9PF5K42F09459	Brand	Detail	Explicit	12/10/2021
2 of 2						
View All						

For a description of the fields displayed in the **Product Alignments** section, see [Product Alignments in the Product Alignments Tab](#).

Product Alignments Exclusion

Product Alignments Exclusion						
	Product Name	Product Integration Id	Product Type	Product Alignment Type	Effective Date	End Date
1	Baconopen	10000000088942	Detail	Sample	8/7/2020	
1 Records						
View All						

For a description of the fields displayed in the **Product Alignments Exclusion** section, see [Product Alignments Exclusion in the Product Alignments Tab](#).

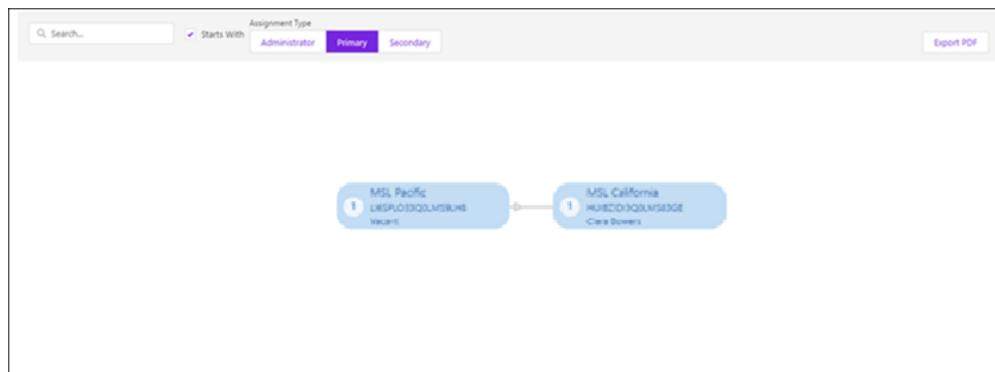
Product Alignments Explicit

Product Alignments Explicit						Hierarchy	Export
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.

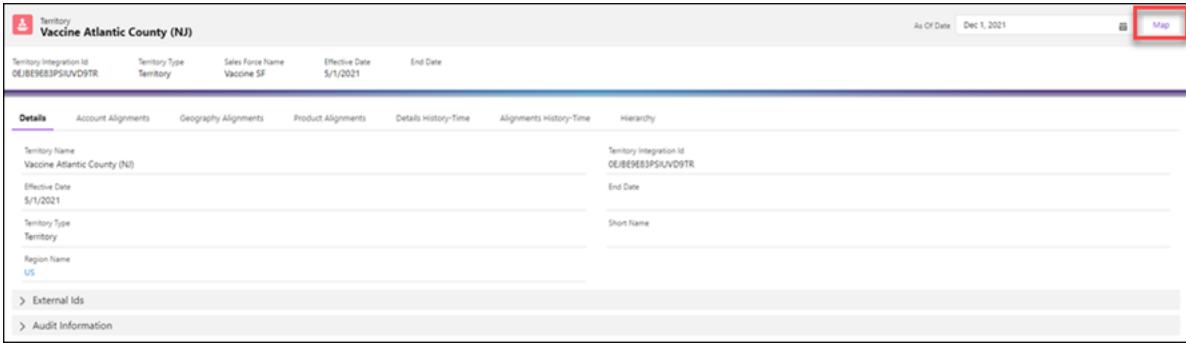
To export hierarchy chart results to a PDF file, click **Export PDF**.

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.

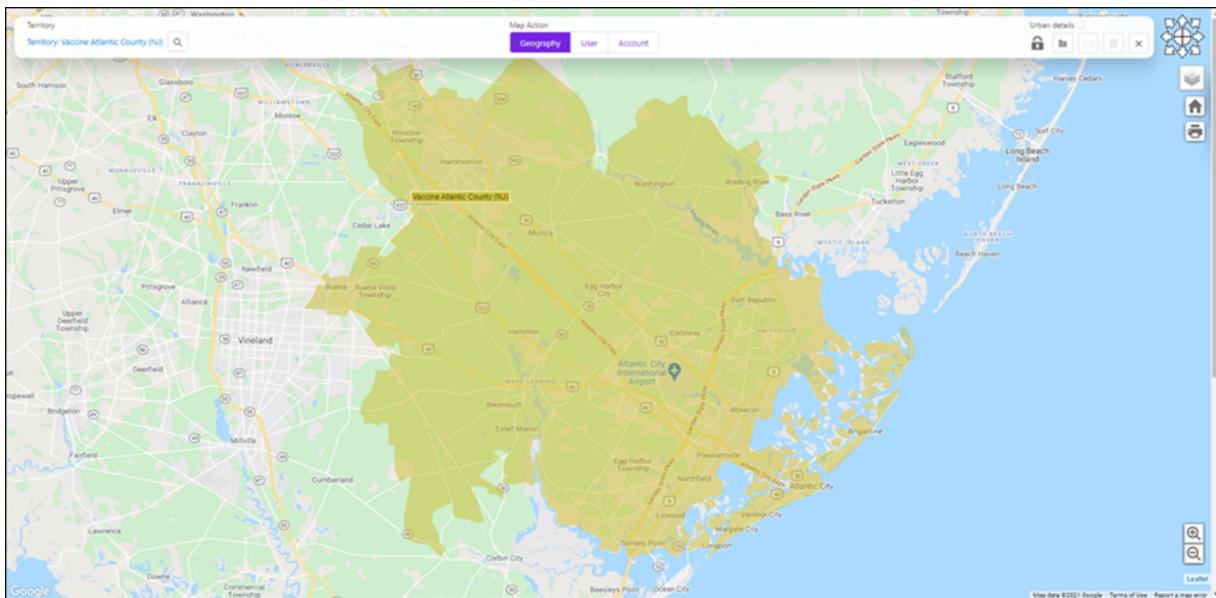
To access Maps from the Territories module

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



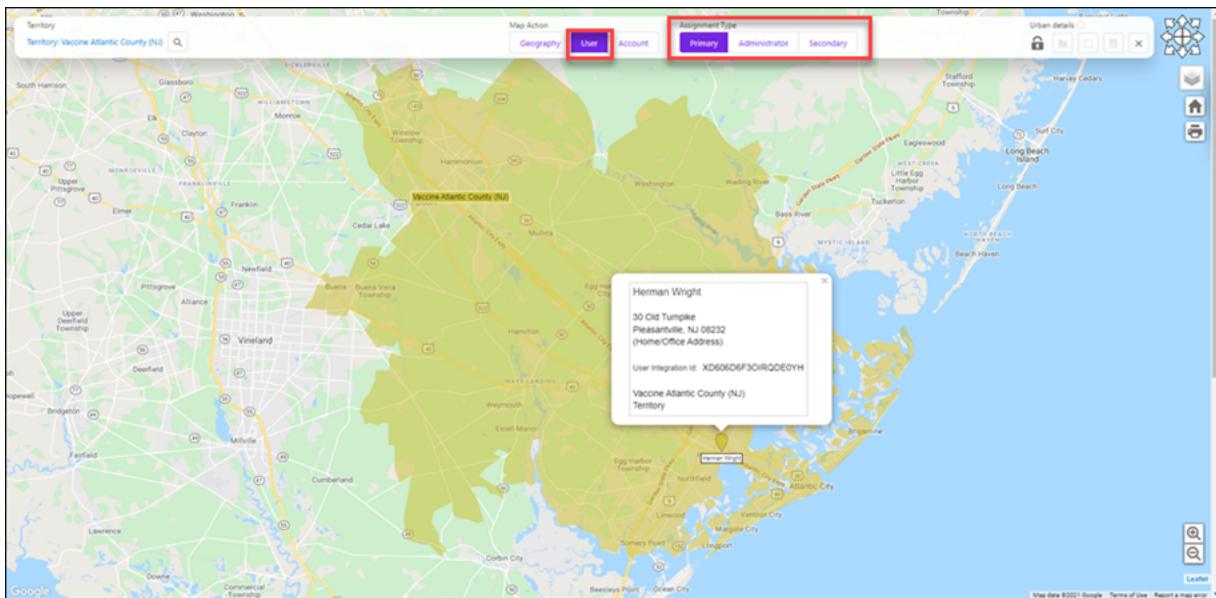
The screenshot shows the 'Territory' details page for 'Vaccine Atlantic County (NJ)'. At the top right, there is a 'Map' button with a red box around it. The page includes fields for Territory Integration Id, Territory Type, Sales Force Name, Effective Date, and End Date. Below these are tabs for Details, Account Alignments, Geography Alignments, Product Alignments, Details History-Time, Alignments History-Time, and Hierarchy. Under the Details tab, there are sections for Territory Name, Effective Date, Territory Type, Region Name, and External IDs/Audit Information. The 'Territory Name' section shows 'Vaccine Atlantic County (NJ)' and its integration ID '0E1BE9E83PSUVD9TR'. The 'Effective Date' section shows '5/1/2021'. The 'Territory Type' section shows 'Territory'. The 'Region Name' section shows 'US'.

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

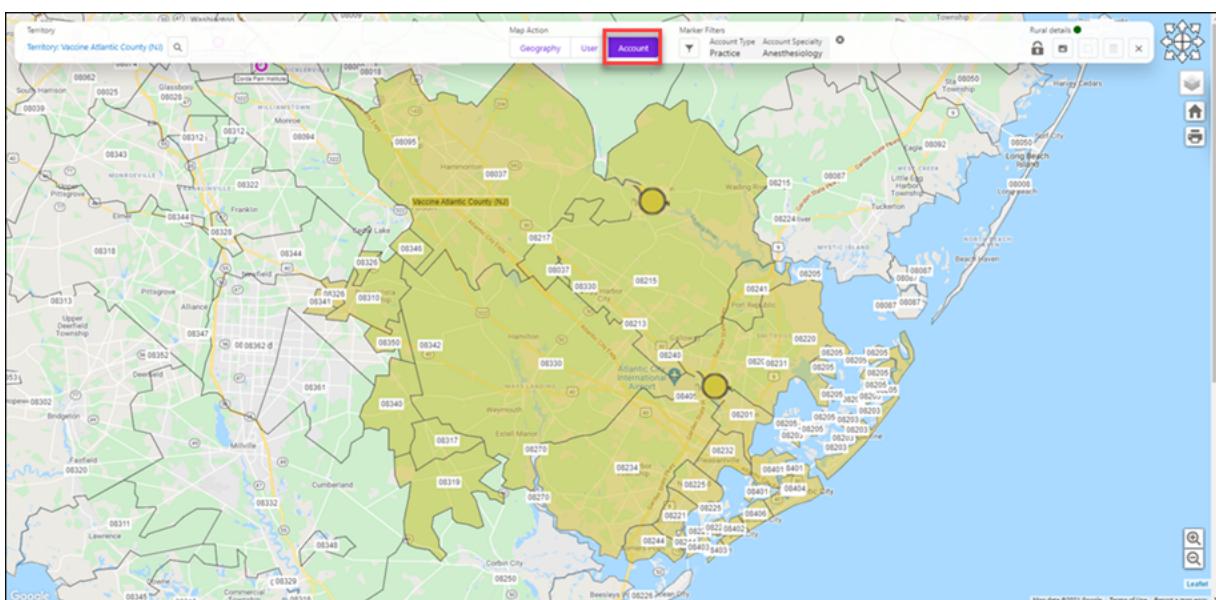


- Click **User** to view the address of the field user. To view a user with different **Assignment Types**, click **Administrator** or **Secondary**.

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



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



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

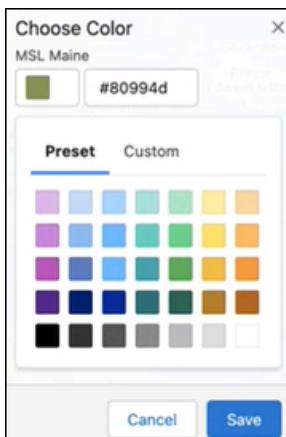
Change territory color

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

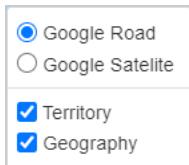
Territory boundaries display in different colors for each boundary. For example, district territory view displays each of the child territories in different colors. To view child boundaries, double-click anywhere on the parent territory.

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](#).

Users						
		As Of Date		Feb 4, 2022		
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With <input type="button"/>				
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	Dec 8, 2020	<input type="button"/>
------------	-------------	------------------------

- 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 Edward Earry	As Of Date	Dec 8, 2020	<input type="button"/>	Edit	Delete	End Date
User Integration Id 10000000620328	Territory Name Delaware - Oncology Sales	Territory Integration Id 100690000013130	Effective Date 8/1/2019	End Date		

- **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.

User Edward Earry		As Of Date	Dec 8, 2020		Edit	Delete																																									
User Integration Id 10000000620328	Territory Name Delaware - Oncology Sales	Territory Integration Id 100690000013130	Effective Date 8/1/2019		End Date																																										
<table border="1"> <thead> <tr> <th>Details</th> <th>Additional</th> <th>Fleet</th> <th>Details History-Time</th> <th>Hierarchy</th> </tr> </thead> <tbody> <tr> <td>User Name Edward Earry</td> <td></td> <td></td> <td></td> <td>User Integration Id 10000000620328</td> </tr> <tr> <td>Effective Date 8/1/2019</td> <td></td> <td></td> <td></td> <td>End Date</td> </tr> <tr> <td>First Name Edward</td> <td></td> <td></td> <td></td> <td>Middle Name E</td> </tr> <tr> <td>Last Name Earry</td> <td></td> <td></td> <td></td> <td>User Type Field Sales</td> </tr> <tr> <td>Role</td> <td></td> <td></td> <td></td> <td>Primary Email Address earryb9@not-here.com</td> </tr> <tr> <td>Employment Status</td> <td></td> <td></td> <td></td> <td>Sampling Status</td> </tr> <tr> <td>Hire Date</td> <td></td> <td></td> <td></td> <td>Termination Date</td> </tr> </tbody> </table>								Details	Additional	Fleet	Details History-Time	Hierarchy	User Name Edward Earry				User Integration Id 10000000620328	Effective Date 8/1/2019				End Date	First Name Edward				Middle Name E	Last Name Earry				User Type Field Sales	Role				Primary Email Address earryb9@not-here.com	Employment Status				Sampling Status	Hire Date				Termination Date
Details	Additional	Fleet	Details History-Time	Hierarchy																																											
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Role				Primary Email Address earryb9@not-here.com																																											
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Hire Date				Termination Date																																											

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

The screenshot shows the 'User Details' tab for a user named Diana Lawson. The interface has tabs at the top: Details, Additional, Fleet, Details History-Time, and Hierarchy. The 'Details' tab is selected. At the top right, there are buttons for 'As Of Date' (set to Mar 2, 2022), 'New', 'Edit', 'Delete', and 'End Date'. The main area is divided into two columns. The left column contains fields like User Name (Diana Lawson), Effective Date (5/1/2021), First Name (Diana), Last Name (Lawson), Role, Employment Status, Hire Date, Gender, and Salesforce User. The right column contains fields like User Integration ID (HF8CHIKM3QBIOKVH09), End Date, Middle Name, User Type (Field Sales), Primary Email Address (diana.lawson@company.com), Sampling Status, Termination Date, Region Name (US), and SFDC Federation ID.

- **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

Additional Details	
Second Last Name	Preferred Name
Prefix	Suffix
Birth Month	Service Date
Birth Day	Hire Source
Cost Center	Marital Status
Country	New Hire
Time Zone (GMT-04:00) Eastern Daylight Time (America/New_York)	Locale English (United States)
Language English	Email Encoding General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Profile Sales Representative	

- **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 IDs

External ID1	External ID2
External ID3	External ID4
External IDs	

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

Audit Information

Audit Information

Created By System, 11/6/2020, 12:08 PM	Last Modified By System, 11/6/2020, 12:08 PM
-------------------------------------------	-------------------------------------------------

- **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

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								

- **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 Titles						
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						

- **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

Manager						
User Name	Manager Integration Id	Territory Name	Territory Integration Id	Territory Type	Assignment Type	Effective Date
1 Ab Rosenstein	10000000620363	North East - Diabetes Sales	10000000148439	District	Primary	01/01/2020
1 of 1						
View All						

- **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

Manages Directly		<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With					<input type="button" value="Export"/>
User Name	User Integration Id	User Assignment Type	Territory Name	Territory Integration Id	Territory Type	Effective Date	End Date		
1 Debbie Wheeler	3LKOEZTV3OIX4C7MM1	Primary	MSL Indiana	EV6WY0403QOLMS9LH6	District	5/1/2021			
1 of 1									
View All									

- **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							<input type="button" value="New"/>
Communication Type	Communication Details	Comments	Effective Date	End Date	Created By	Last Modified By	
1 Cell Phone	555-321-8890		12/8/2020		Home Office, 12/8/2020, 2:04	Home Office, 12/8/2020, 2:04	
1 Records							
View All							

- **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	8388 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

Emergency Contacts							New	Export
	First Name	Last Name	Middle Name	Second Last Na...	Relationship	Day Time Phone	Phone Extension	
1	Leah	Earry	Ann		Spouse	555-321-6794		
1 Records								
View All								

- **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, 11	
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 By	
1	Bachelor's Degree	Business Administration		1973	Jarvis Christian College	Cierra Vega, 11/5/2020, 5	Cierra Vega, 11/5/2020, 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

Vehicles							New	Export
Make	Model	Year	Color	VIN	License Plate Number	License State		
1 Acura	RDX	2014	Blue	123456789	WZY47Z	NJ		
1 Records								
View All								

- **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

Drivers							New	Export
	Driver Name	License Number	License State	Expiration Date	Comments	Created By	Last Modified By	
1	Edward Earry	87654921358790	NJ			Home Office, 12/8/2020, 4:11	Home Office, 12/8/2020, 4:11	
1 Records								
View All								

- **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

Accidents/Incidents							New	Export
	Driver Name	Incident Date	Report Date	Comments	Created By	Last Modified By		
1	Edward Earry	12/4/2020	12/4/2020		Home Office, 12/8/2020, 4:58 P	Home Office, 12/8/2020, 4:58 P		
1 Records								
View All								

- **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

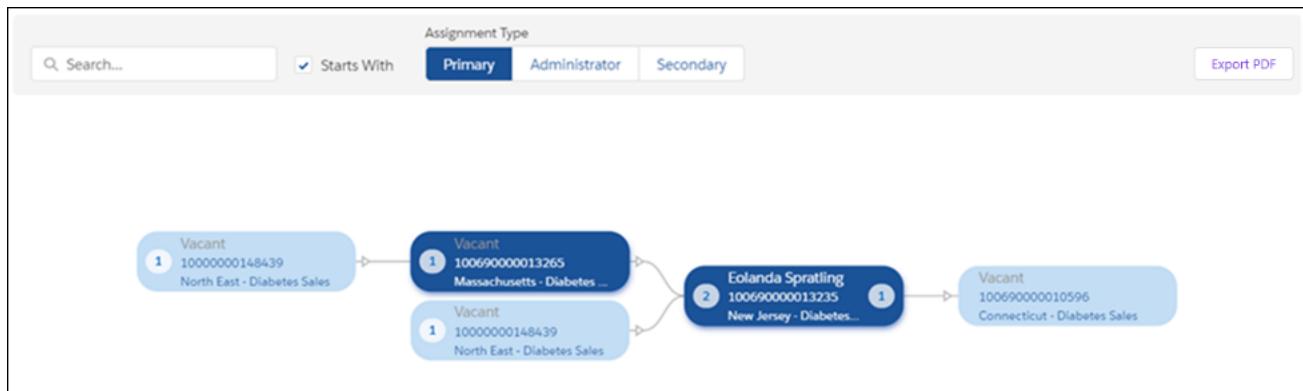
Note: Field Title use is parameter-driven and is controlled by the system administrator.

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**.

User Name	User Integration Id	User Type	Territory Name	Territory Integration Id	Sales Force Name	Sales Force Integration Id
1 Ab Rosenstein	10000000620363	Field Sales	Vaccine - Bergen County	PWFKRPEQ26C4TOB61L	Vaccine SF	7LRZHWXK26C3SG...
2 Alisun Olohan	10000000620293	Field Sales	Vaccine - Business Unit	8WS81CUF26C3VHTQH	Vaccine SF	7LRZHWXK26C3SG...
3 Babs Steutly	10000000620058	Field Sales				
4 Edward Earry	10000000620328	Field Sales	Vaccine - Middlesex county	2055P3OF26C5JSGJOP	Vaccine SF	7LRZHWXK26C3SG...
5 Eolanda Spratling	10000000620664	Field Sales	North East - Oncology Sales	16193000018497	Oncology Sales	10000000087264
6 Esme Battye	10000000620125	Field Sales				
7 Farrel Terrett	10000000620259	Field Sales				
8 Francene Persent	10000000620497	Field Sales				
9 Freddy Heavy	10000000620597	Field Sales	Vaccine - NJ North	073EJQR426C4CAEL7D	Vaccine SF	7LRZHWXK26C3SG...
10 Hi Cella	10000000620398	Field Sales	Vaccine - NJ South	96V11KBI26C4F279MH	Vaccine SF	7LRZHWXK26C3SG...
11 John Smith	ZABHVOPV26DJYO...	Field Sales	Vaccine - NJ Central	Z48174IJ26C63C0OYH	Vaccine SF	7LRZHWXK26C3SG...
12 Kelcie Humbell	10000000620564	Field Sales				
13 Kirby Self	10000000620025	Field Sales				

21 Records

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

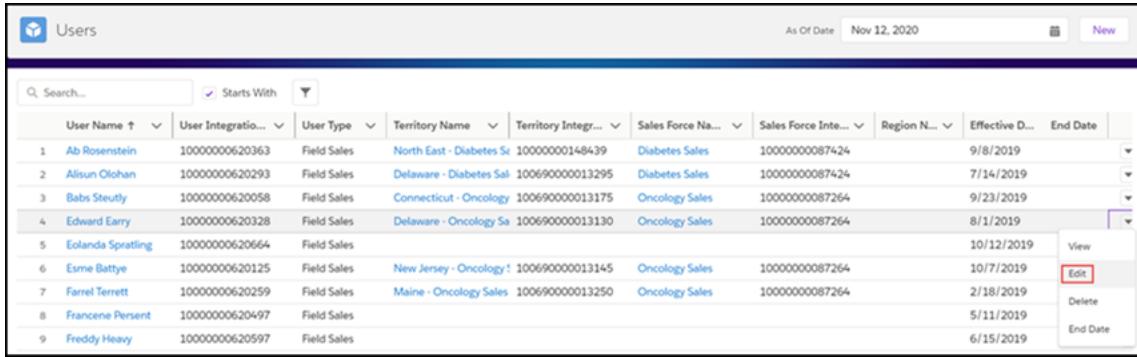
You can edit user information.

To edit a user

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

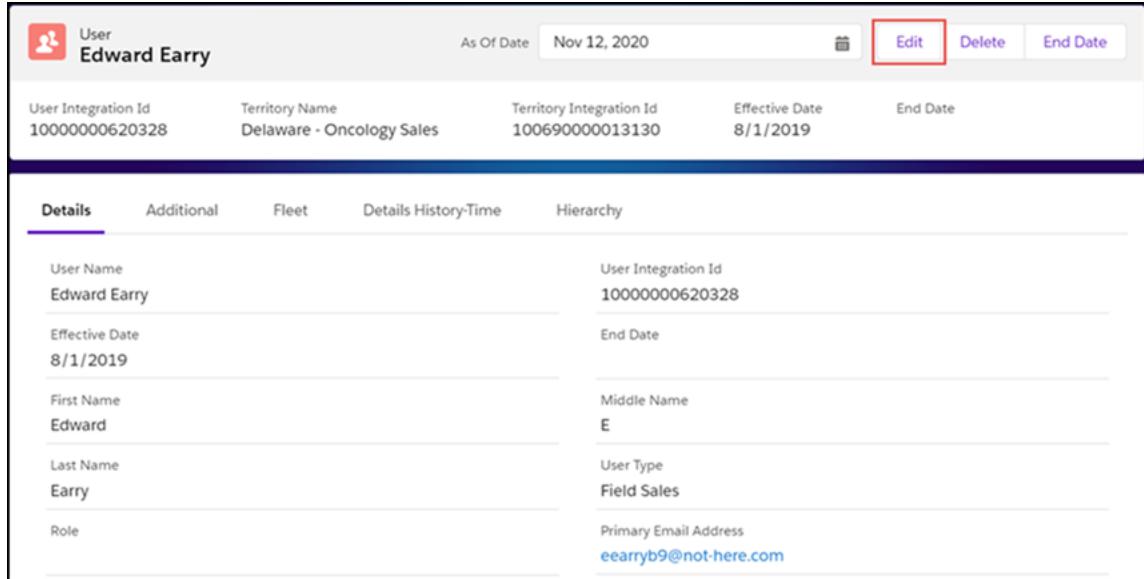
Note: Use the **Search**  and **Filters**  functions to help you locate the user. See [Search and Filter Functions](#).

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



User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name	Effective Date	End Date	Action
1 Ab Rosenstein	10000000620363	Field Sales	North East - Diabetes Sales	100000000148439	Diabetes Sales	100000000087424		9/8/2019		View
2 Alison Olohan	10000000620293	Field Sales	Delaware - Diabetes Sales	100690000013295	Diabetes Sales	100000000087424		7/14/2019		View
3 Babs Steutly	10000000620058	Field Sales	Connecticut - Oncology	100690000013175	Oncology Sales	100000000087264		9/23/2019		View
4 Edward Earry	10000000620326	Field Sales	Delaware - Oncology Sales	100690000013130	Oncology Sales	100000000087264		8/1/2019		View
5 Eolanda Spratling	10000000620664	Field Sales						10/12/2019		View
6 Esme Battye	10000000620125	Field Sales	New Jersey - Oncology	100690000013145	Oncology Sales	100000000087264		10/7/2019		View
7 Farrel Terrell	10000000620259	Field Sales	Maine - Oncology Sales	100690000013250	Oncology Sales	100000000087264		2/18/2019		View
8 Francene Persent	10000000620497	Field Sales						5/11/2019		View
9 Freddy Heavy	10000000620597	Field Sales						6/15/2019		View

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



User
Edward Earry

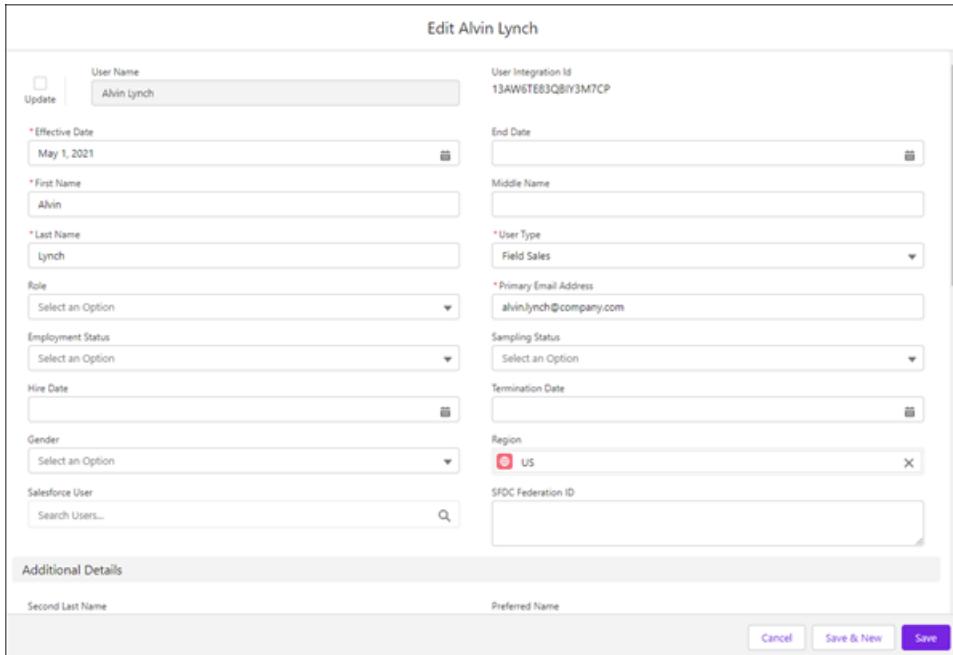
As Of Date Nov 12, 2020

User Integration Id 10000000620328 Territory Name Delaware - Oncology Sales Territory Integration Id 100690000013130 Effective Date 8/1/2019 End Date

Details	Additional	Fleet	Details History-Time	Hierarchy
User Name Edward Earry			User Integration Id 10000000620328	
Effective Date 8/1/2019			End Date	
First Name Edward			Middle Name E	
Last Name Earry			User Type Field Sales	
Role			Primary Email Address earryb9@not-here.com	

- 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**.



Edit Alvin Lynch

User Name
Alvin Lynch

User Integration Id
13AW6TE83QB1Y3M7CP

Effective Date
May 1, 2021

First Name
Alvin

Last Name
Lynch

Role
Select an Option

Employment Status
Select an Option

Hire Date
Select an Option

Gender
Select an Option

Salesforce User
Search Users...

Sampling Status
Select an Option

Termination Date
Select an Option

Region
US

SFDC Federation ID
Select an Option

Additional Details

Second Last Name
Preferred Name

Cancel Save & New Save

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

Delete a User

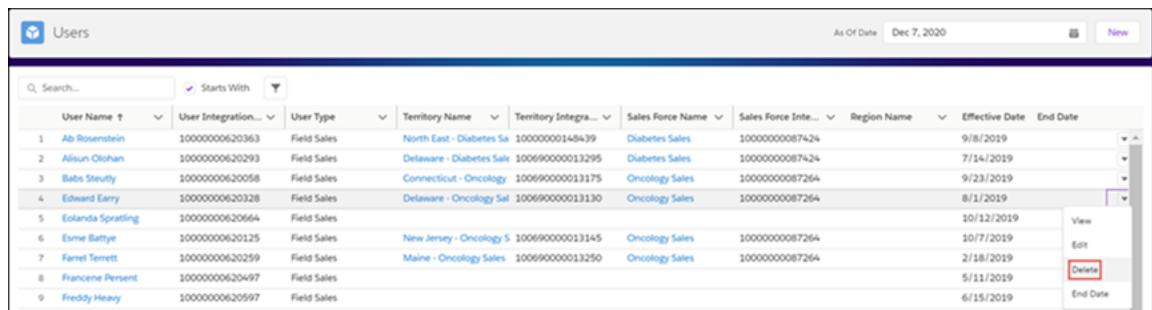
If you add a user by mistake, you can delete the user's profile.

To delete a user

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

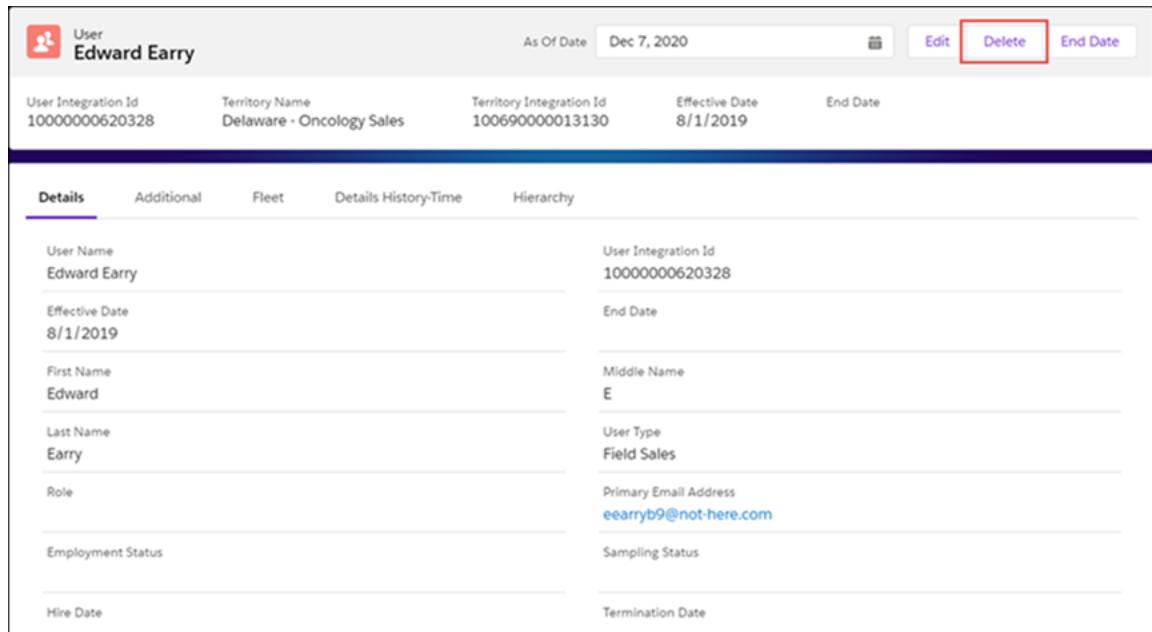
Note: Use the **Search**  and **Filters**  functions to help you locate the user. See [Search and Filter Functions](#).

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



User Name	User Integration Id	User Type	Territory Name	Territory Integration Id	Sales Force Name	Sales Force Integration Id	Region Name	Effective Date	End Date
Ab Rosenstein	10000000620363	Field Sales	North East - Diabetes Sa	10000000148439	Diabetes Sales	10000000087424		9/8/2019	
Alison Olohan	10000000620293	Field Sales	Delaware - Diabetes Sales	1006900000013295	Diabetes Sales	10000000087424		7/14/2019	
Babs Steutly	10000000620056	Field Sales	Connecticut - Oncology	1006900000013175	Oncology Sales	10000000087264		9/23/2019	
Edward Earry	10000000620328	Field Sales	Delaware - Oncology Sa	1006900000013130	Oncology Sales	10000000087264		8/1/2019	
Eolanda Spratling	10000000620664	Field Sales						10/12/2019	
Esme Battye	10000000620125	Field Sales	New Jersey - Oncology S	1006900000013145	Oncology Sales	10000000087264		10/7/2019	
Farrel Terrett	10000000620259	Field Sales	Maine - Oncology Sales	1006900000013250	Oncology Sales	10000000087264		2/18/2019	
Francene Penseit	10000000620497	Field Sales						5/11/2019	
Freddy Heavy	10000000620597	Field Sales						6/15/2019	

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



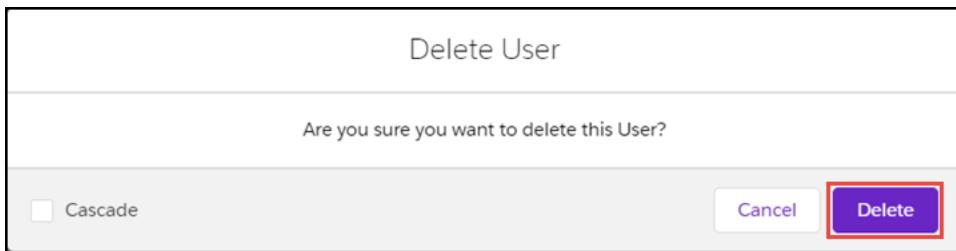
User Integration Id	Territory Name	Territory Integration Id	Effective Date	End Date
10000000620328	Delaware - Oncology Sales	1006900000013130	8/1/2019	

Details [Additional](#) [Fleet](#) [Details History-Time](#) [Hierarchy](#)

User Name Edward Earry	User Integration Id 10000000620328
Effective Date 8/1/2019	End Date
First Name Edward	Middle Name E
Last Name Earry	User Type Field Sales
Role	Primary Email Address eearryb9@not-here.com
Employment Status	Sampling Status
Hire Date	Termination Date

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](#).

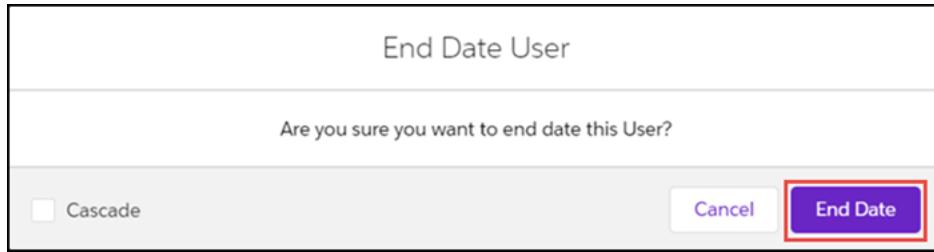
Note: You can also end date a user via the Edit User screen by updating the **End Date** to any date in the past, present, or future. See [Modify User Information](#).

A screenshot of the 'Users' list screen. The table has columns for User Name, User Integration ID, User Type, Territory Name, Territory Integration ID, Sales Force Name, Sales Force Integration ID, Region, Effective Date, and End Date. The 'End Date' column shows dates like 9/8/2019, 7/14/2019, etc. On the far right of each row is a context menu with options: View, Edit, Delete, and End Date. The 'End Date' option is highlighted with a red box.

User Name	User Integratio...	User Type	Territory Name	Territory Integr...	Sales Force Na...	Sales Force Inte...	Region ...	Effective D...	End Date
Ab Rosenstein	10000000620363	Field Sales	North East - Diabetes Sc	10000000148439	Diabetes Sales	10000000087424		9/8/2019	
Alison Olohan	10000000620293	Field Sales	Delaware - Diabetes Sal	100690000013295	Diabetes Sales	10000000087424		7/14/2019	
Babs Steutly	10000000620058	Field Sales	Connecticut - Oncology	100690000013175	Oncology Sales	10000000087264		9/23/2019	
Edward Earry	10000000620328	Field Sales	Delaware - Oncology Sa	100690000013130	Oncology Sales	10000000087264		8/1/2019	
Eolanda Spratling	10000000620664	Field Sales						10/12/2019	
Esme Battye	10000000620125	Field Sales	New Jersey - Oncology!	100690000013145	Oncology Sales	10000000087264		10/7/2019	
Farrel Terrett	10000000620259	Field Sales	Maine - Oncology Sales	100690000013250	Oncology Sales	10000000087264		2/18/2019	
Francene Persent	10000000620497	Field Sales						5/11/2019	
Freddy Heavy	10000000620597	Field Sales						6/15/2019	

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

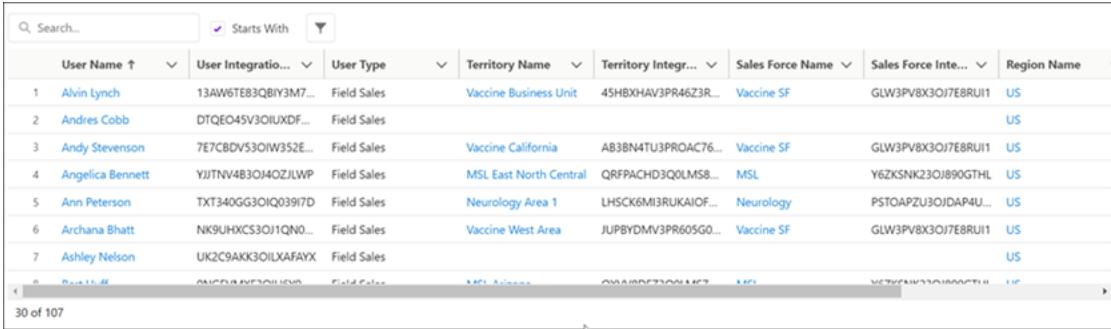
You can add addresses to the user's profile.

To add an address to a user's profile

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

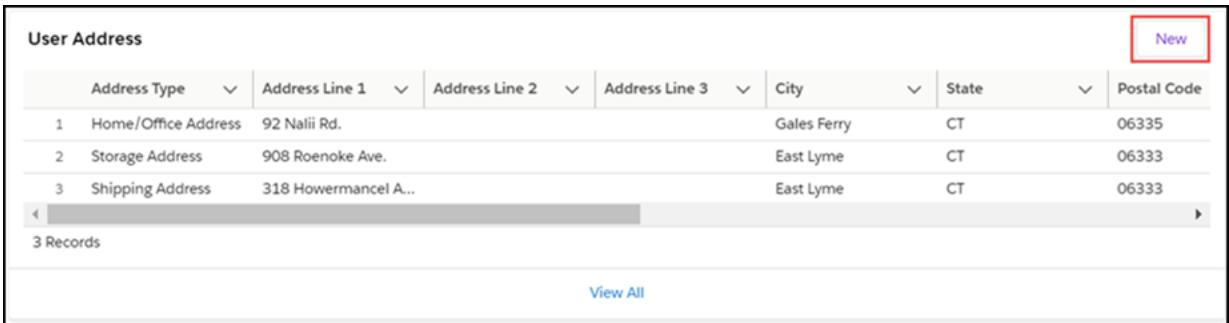
- Click the user whose profile you are adding an address to.

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



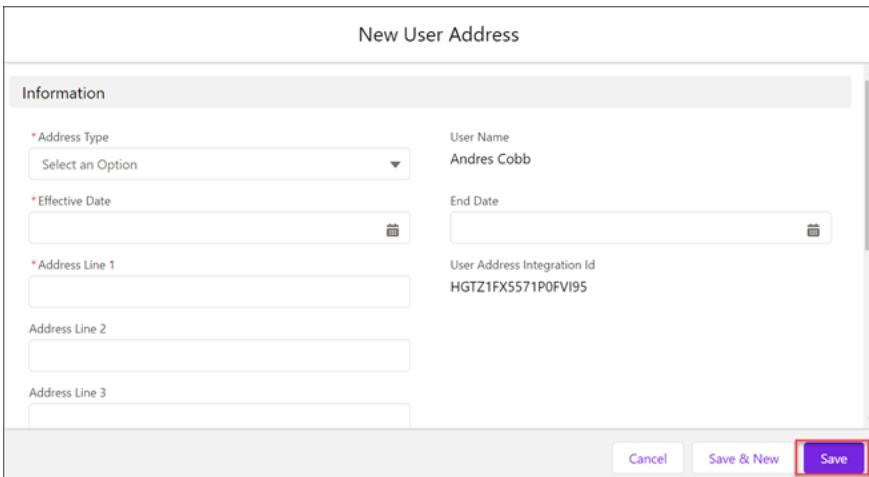
A screenshot of a user search results table. The table has columns for User Name, User Integration ID, User Type, Territory Name, Territory Integration ID, Sales Force Name, Sales Force Integration ID, and Region Name. The data shows various users like Alvin Lynch, Andres Cobb, Andy Stevenson, etc., across different territories and sales forces.

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



A screenshot of the User Address section. It shows a table with columns for Address Type, Address Line 1, Address Line 2, Address Line 3, City, State, and Postal Code. There are three records listed: Home/Office Address (92 Nallii Rd, Gales Ferry, CT, 06335), Storage Address (908 Roenoke Ave, East Lyme, CT, 06333), and Shipping Address (318 Howermancel A..., East Lyme, CT, 06333). A red box highlights the "New" button in the top right corner.

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



A screenshot of the New User Address dialog box. It contains fields for Address Type (dropdown menu), User Name (Andres Cobb), Effective Date (calendar icon), Address Line 1 (92 Nallii Rd), Address Line 2 (Roenoke Ave), Address Line 3 (Howermancel A...), End Date (calendar icon), and User Address Integration ID (HGTZ1FX5571P0FV195). At the bottom are buttons for Cancel, Save & New, and Save (highlighted with a red box).

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](#).

User Name ↑								User Integratio... ↓	User Type ↓	Territory Name ↓	Territory Integr... ↓	Sales Force Name ↓	Sales Force Inte... ↓	Region Name ↓
1	Alvin Lynch	13AW6TE83QBIY3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US						
2	Andres Cobb	DTQE045V3OIUXDF...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US						
3	Andy Stevenson	7E7CBDV530IWI352E...	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US						
4	Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	Neurology Area 1	LH5CK6M3RUKAIFO...	Neurology	PSTOA2ZU3OJDAP4U...	US						
5	Ann Peterson	TXT340GG3OIQ02997D	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US						
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales					US						
7	Ashley Nelson	UK2C9AKK3OILXAFAZY	Field Sales					US						
8	Dawn Lyle	ONCOUANFZQHJN	Field Sales					US						
30 of 107														

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

Emergency Contacts						
First Name		Last Name	Middle Name	Second Last Na...	Relationship	Day Time Phone
1	Jennifer	Seif	A		Spouse	555-973-1212
1 Records						
View All						

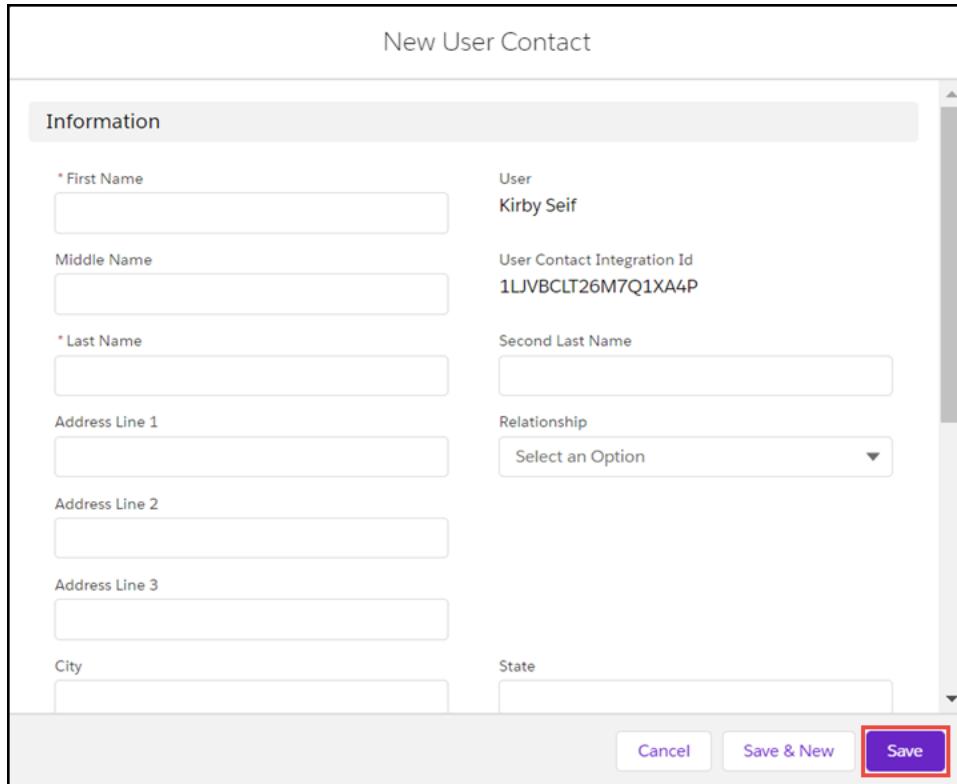
4. Enter emergency contact information and click **Save**.

New User Contact

Information

* First Name	User Kirby Seif
Middle Name	User Contact Integration Id 1LJVBCLT26M7Q1XA4P
* Last Name	Second Last Name
Address Line 1	Relationship Select an Option
Address Line 2	
Address Line 3	
City	State

Cancel Save & New **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](#).

	User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1	Alvin Lynch	13AW6TE83QBIY3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V3OIJXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4T3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4	Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7	Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

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

Dependents						New
First Name	Last Name	Middle Name	Relationship	Gender	Birth Date	
1 John	Seif	Frank		Male	9/13/2006	
1 Records						
View All						

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

New User Dependent

Information

* First Name <input type="text" value="Kirby"/>	User Kirby Seif
Middle Name <input type="text"/>	User Dependent Integration Id CH4NTYQF26M9WFBA6X
* Last Name <input type="text"/>	Gender <input type="button" value="Select an Option"/>
Relationship <input type="button" value="Select an Option"/>	Birth Date <input type="button" value="Select"/>

External IDs

External ID1 <input type="text"/>

[Cancel](#)
[Save & New](#)
[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](#).

	User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1	Alvin Lynch	13AW6TE83QB1Y3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V3OIJXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4T3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4	Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ039I7D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7	Ashley Nelson	UK2C9AKK3OILXAFAFYX	Field Sales					US

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

Education					
Degree-Certification	Major	Description	Year	School/Institution	
1 Bachelor's Degree	Business Administration		1981	Worcester State College	New
1 Records					
View All					

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

New User Education

Information

* School/Institution	User Kirby Seif
Description	User Education Integration Id LF2SLCW426MD1PZMP5
Major	Degree-Certification
Year	

External Ids

External ID1

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](#).

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBIY3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V30IJXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV530IW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4 Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG30IQ039I7D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXC530J1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7 Ashley Nelson	UK2C9AKK30ILXAFAYX	Field Sales					US

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

User Address							New
Postal Code	Extension	Country	Comments	Created By	Last Modified By	End Date	
06335		US		Api Ho, 11/6/2020, 12:08 PM	Api Ho, 11/6/2020,		Edit
06333		US		Api Ho, 11/6/2020, 12:08 PM	Api Ho, 11/6/2020,		
06333		US		Api Ho, 11/6/2020, 12:08 PM	Api Ho, 11/6/2020,		

3 Records

[View All](#)

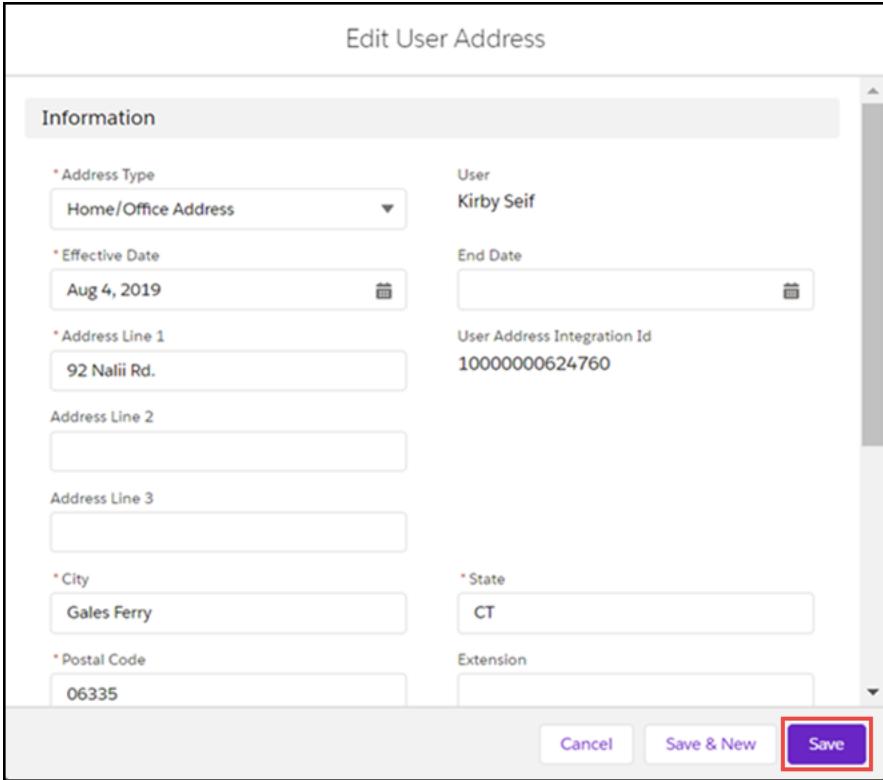
4. Modify the address information and click **Save**.

Edit User Address

Information

* Address Type Home/Office Address	User Kirby Seif
* Effective Date Aug 4, 2019	End Date
* Address Line 1 92 Nalii Rd.	User Address Integration Id 10000000624760
Address Line 2	
Address Line 3	
* City Gales Ferry	* State CT
* Postal Code 06335	Extension

Cancel Save & New **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](#).

	User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1	Alvin Lynch	13AW6TE83QBIY3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V30IJUXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV530IW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4	Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG30IQ039I7D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXC530J1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7	Ashley Nelson	UK2C9AKK30ILXAFAZYX	Field Sales					US

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- 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**.

Emergency Contacts

Postal Code	Extension	Country	Created By	Last Modified By
06335		United States	Api Ho, 11/6/2020, 12:09 PM	Aditi Kapoor, 11/12/2020

1 Records

[View All](#)

New Edit Delete

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

Edit User Contact

Information

* First Name <input type="text" value="Jennifer"/>	User Kirby Seif
Middle Name <input type="text" value="A"/>	User Contact Integration Id 825
* Last Name <input type="text" value="Seif"/>	Second Last Name <input type="text"/>
Address Line 1 <input type="text" value="92 Nalii Rd."/>	Relationship <input type="text" value="Spouse"/>
Address Line 2 <input type="text"/>	
Address Line 3 <input type="text"/>	
City <input type="text" value="Gales Ferry"/>	State <input type="text" value="CT"/>
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="outline: 2px solid red; border-radius: 5px; padding: 2px 10px;" type="button" value="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](#).

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V30IJXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV530IW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4 Angelica Bennett	YIJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG30IQ03917D	Field Sales	Neurology Area 1	LHSCK6MI3RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXCS30I1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7 Ashley Nelson	UK2C9AKK30ILXAFAZYX	Field Sales					US

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**.

Dependents

Relationship	Gender	Birth Date	Created By	Last Modified By	
Male	9/13/2006	Api Ho, 11/6/2020, 12:09 PM	Aditi Kapoor, 11/12/2022	Edit	Delete

1 Records

[View All](#)

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

Edit User Dependent

Information

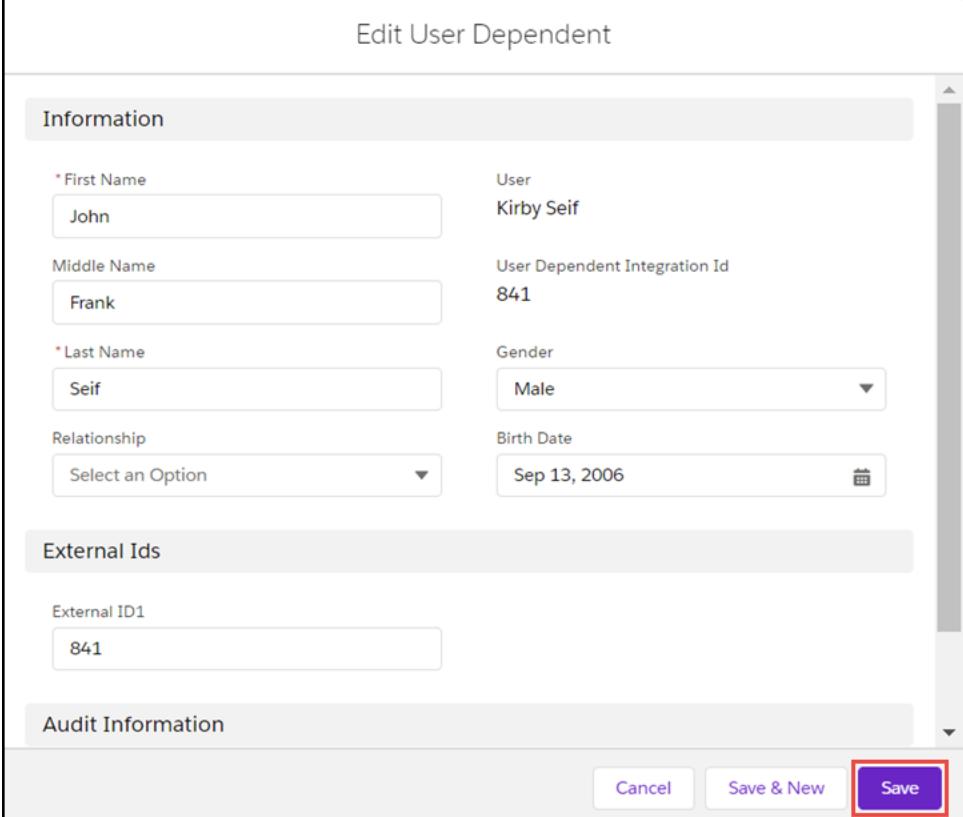
* First Name John	User Kirby Seif
Middle Name Frank	User Dependent Integration Id 841
* Last Name Seif	Gender Male
Relationship Select an Option	Birth Date Sep 13, 2006

External Ids

External ID1 841

Audit Information

Cancel Save & New **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](#).

	User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1	Alvin Lynch	13AW6TE83QBIY3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V30IJXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV530IW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4	Angelica Bennett	YIJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG30IQ039I7D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXCS30J1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7	Ashley Nelson	UK2C9AKK30ILXAFAZYX	Field Sales					US

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

Education			
Year	School/Institution	Created By	Last Modified By
1981	Worcester State College	Api Ho, 11/6/2020, 12:10 PM	Api Ho, 11/6/2020, 12:10 PM

1 Records

[View All](#)

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

Edit User Education

Information

* School/Institution Worcester State College	User Kirby Seif
Description	User Education Integration Id 10000000957687
Major Business Administration	Degree-Certification Bachelor's Degree
Year 1981	

External IDs

External ID1 10000000957687

Audit Information

Cancel Save & New **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](#).

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBIY3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V3OIJXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4 Angelica Bennett	YIJTNV4B3OJ4OZILWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7 Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

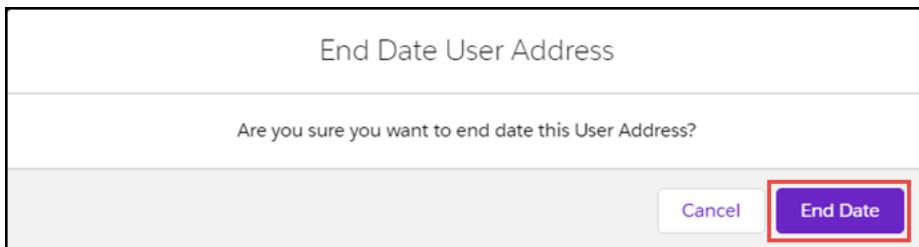
3. Scroll to the **User Address** section, click the drop-down for the address you want to remove, and select **End Date**.

User Address							New
Postal Code	Extension	Country	Comments	Created By	Last Modified By	Actions	
06335		US		Api Ho, 11/6/2020, 12:08 PM	Api Ho, 11/6/2020, 12:08 PM	Edit	End Date
06333		US		Api Ho, 11/6/2020, 12:08 PM	Api Ho, 11/6/2020, 12:08 PM	Edit	End Date
06333		US		Api Ho, 11/6/2020, 12:08 PM	Api Ho, 11/6/2020, 12:08 PM	Edit	End Date

3 Records

[View All](#)

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.

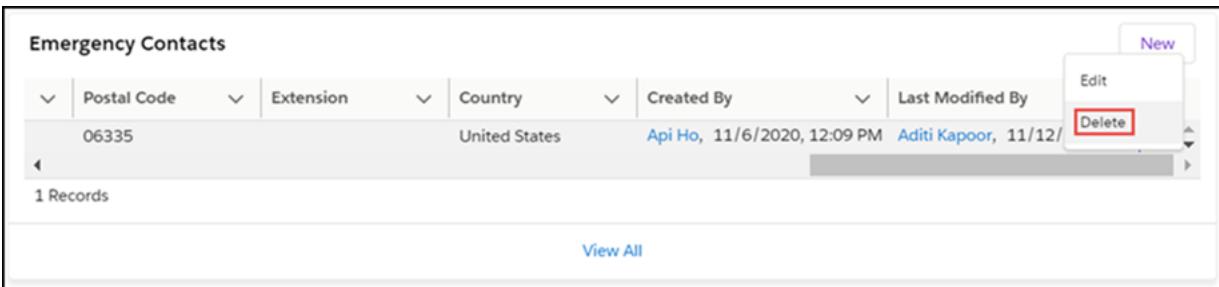
To end date an emergency contact

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](#).

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXH4V3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2 Andres Cobb	DTQE045V30IUXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4 Angelica Bennett	YJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6M13RUKAI0F...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXCS3O1QNO...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7 Ashley Nelson	UK2C9AK30ILXAFAFYX	Field Sales					US
8
30 of 107							

- 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**.



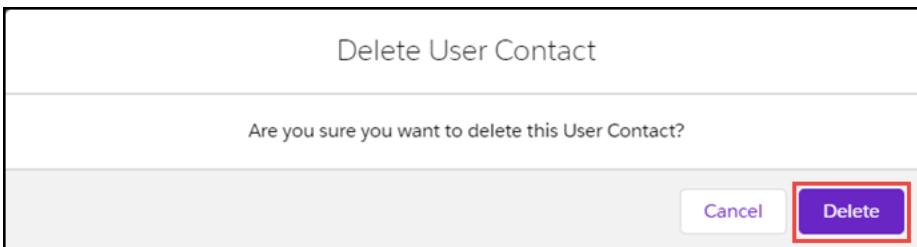
Emergency Contacts

Postal Code	Extension	Country	Created By	Last Modified By
06335	United States	Api Ho, 11/6/2020, 12:09 PM	Aditi Kapoor, 11/12/...	

1 Records

[View All](#)

- 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.

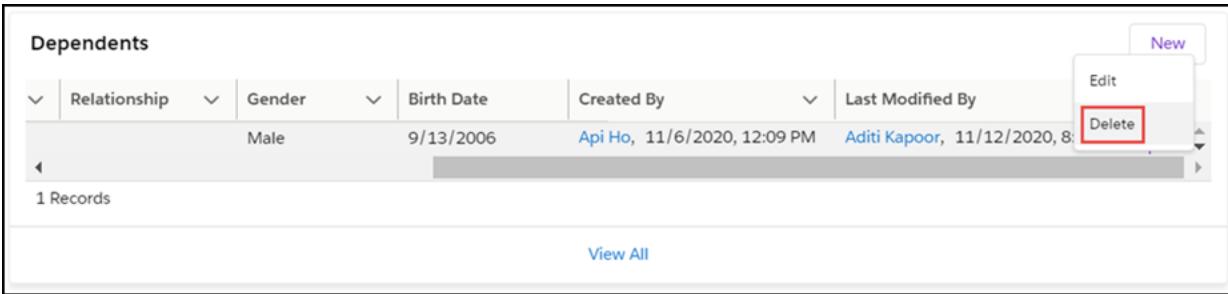
To end date a dependent

- Click **Users** from the primary navigation bar.
- 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](#).

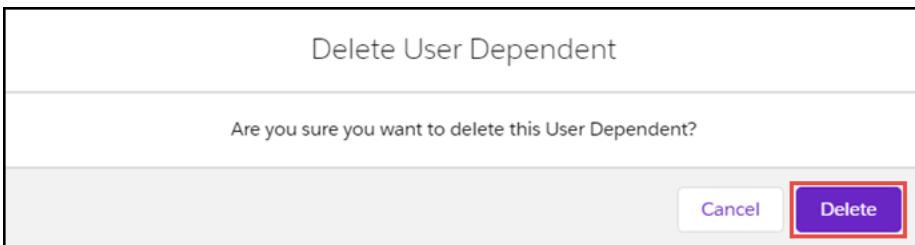
User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXH4V3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2 Andres Cobb	DTQEO45V3OIUXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4 Angelica Bennett	YJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6M13RUKAI0F...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXCS3O1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7 Ashley Nelson	UK2C9AK3OILXAFAKY	Field Sales					US
8
30 of 107							

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



Dependents				
Relationship	Gender	Birth Date	Created By	Last Modified By
Male	9/13/2006	Api Ho, 11/6/2020, 12:09 PM	Aditi Kapoor, 11/12/2020, 8:...	
1 Records				
View All				

- 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.

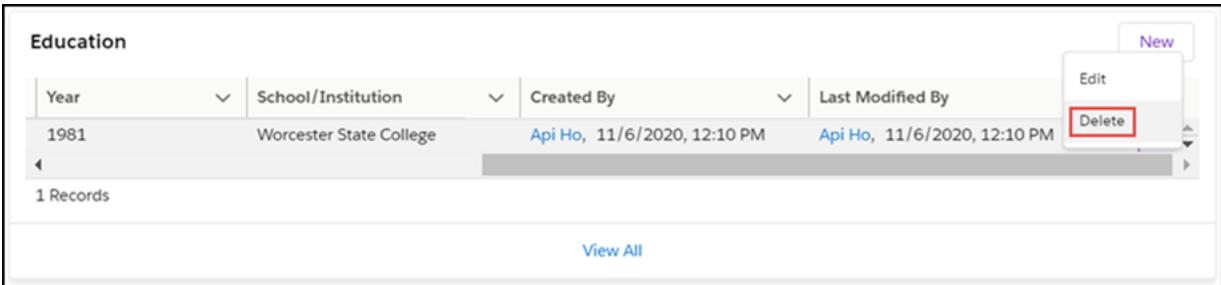
To end date education information

- Click **Users** from the primary navigation bar.
- 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](#).

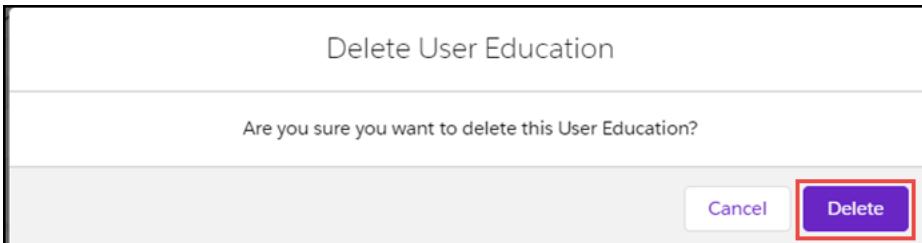
User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QB1Y3M7...	Field Sales	Vaccine Business Unit	45HBXH4V3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2 Andres Cobb	DTQEO45V3O1UXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4 Angelica Bennett	YJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6M13RUKAI0F...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXCS3O1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7 Ashley Nelson	UK2C9AK3OILXAFAYX	Field Sales					US
8
30 of 107							

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



The screenshot shows the 'Education' section of the OCE Optimizer. It includes fields for Year (1981), School/Institution (Worcester State College), Created By (Api Ho, 11/6/2020, 12:10 PM), and Last Modified By (Api Ho, 11/6/2020, 12:10 PM). A dropdown menu is open next to the record, showing options for 'Edit' and 'Delete'. The 'Delete' option is highlighted with a red box.

- 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](#).

User Name	User Integratio...	User Type	Territory Name	Territory Integr...	Sales Force Name	Sales Force Inte...	Region Name
1 Alvin Lynch	13AW6TE83QB1Y3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE04SV3OIJUXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4 Angelica Bennett	YJTNV4B3OJ4OZLWP	Field Sales	MSL East North Central	QRFPACHD3QQLMS8...	MSL	Y6ZKSNK23OJB90GTHL	US
5 Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6MI3RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXC53OJ1QNO...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7 Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

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.

User Assignments					
	Territory Name ↑	Territory Integratio...	Territory Type	Assignment Type	Is Pending
1	Connecticut - Diabetes Sal	100690000010596	Territory	Primary	Diabetes Sales
1 Records					
View All					

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

New User Assignment

Information	
* Territory Search Territories...	User Name Ashley Nelson
* Effective Date	End Date
* Assignment Type Select an Option	User Assignment Integration Id BXNGBL157M05IQ7EH
External Ids	
External ID1	
Field Title	
* Field Title Search Field Titles...	Field Title Description
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="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.

User Assignments					
	Territory Name ↑	Territory Integration Id	Territory Type	Assignment Type	Is Pending
1	Connecticut - Diabetes Sales	100690000010596	Territory	Primary	<input checked="" type="checkbox"/>
2	New Jersey - Diabetes Sales	100690000013235	Territory	Secondary	<input checked="" type="checkbox"/>
2 Records					
View All					

Scenarios							
Search...		Starts With					
Scenario Name	Scenario Integration Id	Scenario Status	Scenario Type	Effective D...	End Date	Processing Start Time	
1 Kirby Seif New Jersey - Diabetes Sales	G1I1520F2916KO2115	Committing	Internal	11/12/2020			
2 Vaccine Sales	LLNYW74Q28PTEA56JD	Pending	User	11/12/2020			

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

Scenarios							
Search...		Starts With					
Scenario Name	Scenario Integration Id	Scenario Status	Scenario Type	Effective D...	End Date	Processing Start Time	
1 Kirby Seif New Jersey - Diabetes Sales 2020-	G1I1520F2916KO2115	Committed	Internal	11/12/2020		11/20/2020, 06:08 AM	
2 Vaccine Sales	LLNYW74Q28PTEA56JD	Pending	User	11/12/2020			

User Assignments						
Territory Name	Territory Integration Id	Territory Type	Assignment Type	Is Pending	Sales Force Na...	Sales Force Inte...
1 Connecticut - Diabetes Sales	100690000010596	Territory	Primary		Diabetes Sales	1000000008742
2 New Jersey - Diabetes Sales	100690000013235	Territory	Secondary		Diabetes Sales	1000000008742
2 Records						
View All						

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

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



- 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**.

The screenshot shows a table titled "User Assignments". The columns are: Sales Force Name, Sales Force Integration Id, Effective Date, End Date, Created By, and Last Modified By. A single row is visible for "Diabetes Sales" with the ID 10000000087424, effective from 1/1/2020, and created by System on 11/6/2020. The "Last Modified By" field shows "System, 11/6/2020, 1: System, 11/6/2020". In the top right corner of the row, there is a small "Edit" button with a red box around it. Below the table, it says "1 Records" and "View All".

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

The screenshot shows the "Edit User Assignment" dialog box. It has three tabs: "Information", "External IDs", and "Audit Information". Under "Information", there are fields for Territory Name (MSL Arizona), User Name (Bert Huff), Effective Date (May 1, 2021), End Date (empty), Assignment Type (Primary), and User Assignment Integration Id (D77NE313RU4IH1VKQ). Under "Audit Information", it shows Created By (System) and Last Modified By (System). At the bottom right, there are "Cancel", "Save & New", and a large blue "Save" button with a red box around it.

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 Integration Id	User Type	Territory Name	Territory Integration Id	Sales Force Name	Sales Force Integration Id	Region Name
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXH4V3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2 Andres Cobb	DTQE045V3OILUXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4 Angelica Bennett	YJTNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG3OIIQ39I7D	Field Sales	Neurology Area 1	LHSCK6M3RUKAIOF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXCS3OIJNQ...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7 Ashley Nelson	UK2C9AK3OILXAFAYX	Field Sales					US
8 ALEX... Bla...n	CAKQD9T3Q0LMS8...	Field Sales	KAPZ-Alex...	QWAZK3PQ0LMS8...	ALEX	Y6ZKSNK23OJ890GTHL	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	6CZ1VTZK3Q0LMS78LS	District	MSL		US	5/1/2021	
2 MSL Alaska	J7FF4BE53Q0LMS7GAY	District	MSL		US	5/1/2021	
3 MSL Arizona	OXVB8DEZ3Q0LMS700R	District	MSL	Bert Huff	US	5/1/2021	
4 MSL Arkansas	O6P1ZCF93Q0LMS700S	District	MSL		US	5/1/2021	
5 MSL Business Unit	0VQE703Q0LMS7VQL	Business Unit	MSL		US	5/1/2021	
6 MSL California	HUI8ZI03Q0LMS583GE	District	MSL	Clara Bowers	US	5/1/2021	
7 MSL Colorado	MIM77W2X3Q0LMS583GF	District	MSL		US	5/1/2021	
8 MSL Connecticut	FTLXR8FY3Q0LMS8668	District	MSL		US	5/1/2021	
9 MSL DIST of Columbia	SXACTSF13Q0LMS8W2	District	MSL		US	5/1/2021	
10 MSL Delaware	IBYIXQK3Q0LMS8W1	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	KARMQUAV3Q0LMS8YB0	Area	MSL		US	5/1/2021	
13 MSL... Bla...n	11714B3A3P393XAEVEN	Business Unit	ALEX		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**.

User Assignments									
User Name	User Integration Id	User Type	Assignment Type	Is Pending	Sales Force Name	Sales Force Integration Id	Effective D...	End Date	Created By
1 Angelica Bennett	YJTNV4B3OJ4OZJLWP	Field Sales	Primary	MSL	Y6ZKSNK23OJ890GTHL	5/1/2021	System	9/19/2022, 11:33 AM	System

1 of 1

[View All](#)

4. Click **Delete**.

Delete User Assignment

Are you sure you want to delete this User Assignment?

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

User Assignments

	Territory Name	Territory Integration Id	Territory Type	Assignment Type	Is Pending	Sales Force Name	Sales Force Int.
1	Connecticut - Diabetes Sales	100690000010596	Territory	Primary		Diabetes Sales	1000000008742
2	New Jersey - Diabetes Sales	100690000013235	Territory	Secondary	✓	Diabetes Sales	1000000008742

2 Records

[View All](#)

Scenarios

	Scenario Name	Scenario Integration Id	Scenario Status	Scenario Type	Effective Date	End Date	Processing Start Time
1	Kirby Seif New Jersey - Diabetes Sales	G1I1520F2916KO2115	Committing	Internal	11/12/2020		
2	Vaccine Sales	LLNYW74Q28PTEA56JD	Pending	User	11/12/2020		

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](#).

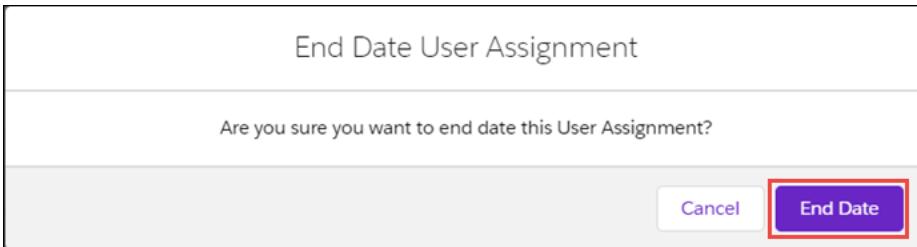
	User Name	User Integratio...	User Type	Territory Name	Territory Integr...	Sales Force Name	Sales Force Int...	Region Name
1	Alvin Lynch	13AW6TE83QB1Y3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V30IJXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV530IJW52E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4	Angelica Bennett	YIJTNV4B3OJ4OZILWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7	Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US

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

User Assignments							
Sales Force Name	Sales Force Integration Id	Effective Date	End Date	Created By	Last Modified By		
Diabetes Sales	10000000087424	1/1/2020		System, 11/6/2020, 1:	System, 11/6/2020, 1:		
1 Records							
View All							

- 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

- Click **Users** or **Territories** from the primary navigation bar.
- 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](#).

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

User Assignments							
Territory Integ...	Territory Type	Assignment Ty...	Is Pending	Sales Force Na...	Sales Force Int...	Effective D...	End Date
VAPURKXT6IFESIGO...	Territory	Primary		Diabetes Sales	10000000087424	05/04/2022	31/05/2022
1 of 1							
View All							

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

- 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**.

Move User Assignment

Information

* Territory User Name

* Effective Date End Date

Assignment Type
Primary

External Ids

External ID1

Field Title

Field Title Field Title Reason

- 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.

The screenshot shows the 'Move User Assignment' dialog box. The 'Information' section contains fields for Territory Name (Connecticut - Diabetes Sales), Effective Date, End Date, User (searchable field), and Assignment Type (Primary). The 'External Ids' section has a field for External ID1. The 'Field Title' section has fields for Field Title and Field Title Reason. At the bottom are 'Cancel' and 'Save' buttons.

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

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

Scenarios										New	Export
Scenario Name	Scenario Integration Id	Scenario Status	Scenario Type	Effective Date	End Date	Processing S...	Processing E...	Region Name			
1 Ab Rosenstein North East - Diabetes Sales 2022-04 CFVYUCH26FGTIPMAH	CFVYUCH26FGTIPMAH	Committed	Internal	05/04/2022		05/04/2022, 00:5...	05/04/2022, 00:5...				
2 Ab Rosenstein TERR1 2022-04-05 user assignment U6USC0E86FH6DZ716	U6USC0E86FH6DZ716	Committed	Internal	05/04/2022	31/05/2022	05/04/2022, 00:5...	05/04/2022, 00:5...				
3 Ab Rosenstein TERR1 2022-04-05 user assignment 30FOQ2LJ6DGVC05GP	30FOQ2LJ6DGVC05GP	Committing	Internal	05/04/2022		05/04/2022, 04:0...					
4 Kirby Self Connecticut - Diabetes Sales 2022-04-05 L6B2KLY6FLDU3KVY	L6B2KLY6FLDU3KVY	Committed	Internal	01/01/2022		05/04/2022, 01:11...	05/04/2022, 01:12...				
5 NEW TERR	EL0NPV536IFD1IQJS9	Committed	User	01/01/2022		05/04/2022, 00:4...	05/04/2022, 00:47...	US			

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](#).

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V3OIJUXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4T3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4 Angelica Bennett	YIJTNV4B3OJ4OZLWP...	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6MI3RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7 Ashley Nelson	UK2C9AKK3OILXAFAKY	Field Sales					US

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

Communication					New
Communication Type	Communication Details	Comments	Effective Date	End Date	
1 Cell Phone	(203) 555-1234		8/4/2019		
1 Records					
View All					

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

New User Communication

Information

* Communication Type
Select an Option

User
Kirby Seif

* Effective Date

End Date

* Communication Details
User Communication Integration Id
29BU6ZNK26WCBOOGVD

Comments

External IDs

External ID1

Cancel Save & New 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](#).

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBY3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V3OIUXDF...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
4 Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	Neurology Area 1	LH5CK6M3RUKAIFO...	Neurology	PSTOA2ZU3OJDAP4U...	US
5 Ann Peterson	TXT340GG3OIR0299T7D	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
6 Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales					US
7 Ashley Nelson	UK2C9AKK3OILXAFAFYX	Field Sales					US

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

Communication			
Effective Date	End Date	Created By	Last Modified By
8/4/2019		Api Ho, 11/6/2020, 12:09 PM	Api Ho, 11/6/2020, 12:09 PM
1 Records			
View All			

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

Edit User Communication

Information

* Communication Type Cell Phone	User Kirby Seif
* Effective Date Aug 4, 2019	End Date
* Communication Details (203) 555-1234	User Communication Integration Id 10000000620029
Comments	

External Ids

External ID1 10000000620029

Audit Information

Cancel Save & New **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](#).

	User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1	Alvin Lynch	13AW6TE83QB1Y3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V3OIJLWDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4	Angelica Bennett	YJITNV4B3OJ4OZILWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6MI3RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7	Ashley Nelson	UK2C9AKK3OILXAFAKY	Field Sales					US

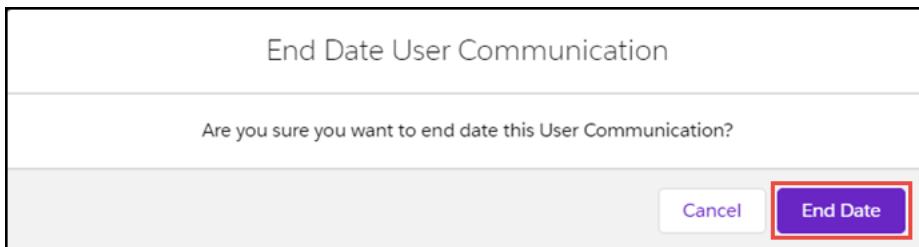
3. Scroll to the **Communication** section, click the drop-down for the communication you want to delete, and select **End Date**.

Communication				
Effective Date	End Date	Created By	Last Modified By	
8/4/2019		Api Ho, 11/6/2020, 12:09 PM	Api Ho, 11/6/2020, 12:09 PM	<div style="border: 1px solid #ccc; padding: 2px;"> Edit End Date </div>

1 Records

[View All](#)

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](#).

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QB1Y3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V3OIUXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV530IW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4 Angelica Bennett	YJITNV4B3QJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG3OIQ0397D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7 Ashley Nelson	UK2C9AKK3OILXAFA	Field Sales					US

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

Vehicles						
Make	Model	Year	Color	VIN	License Plate N...	New
1 Acura	RDX	2010	Blue	123456789	YT2 WX8	
1 Records						View All

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

New User Vehicle

Information	
* Make	User
<input type="text"/>	Kirby Seif
Model	User Vehicle Integration Id
<input type="text"/>	3VXIVI8526WSZ6J215
Year	License Plate Number
<input type="text"/>	<input type="text"/>
Color	License State
<input type="text"/> Select an Option	<input type="text"/>
VIN	License Country
<input type="text"/>	<input type="text"/> Select an Option
Comments	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="outline: 2px solid red;" type="button" value="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 Integration Id	User Type	Territory Name	Territory Integration Id	Sales Force Name	Sales Force Integration Id	Region Name
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V30IJXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV530IW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4 Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG30IQ03917D	Field Sales	Neurology Area 1	LHSCK6MI3RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXC530J1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7 Ashley Nelson	UK2C9AKK30ILXAFAYX	Field Sales					US

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

Drivers							New
Driver Name	License Number	License State	Expiration Date	Comments	Created By		
1 Kirby Seif	D22225425-03248...	DE	9/29/2028	API_ATC_TEST_COM...	Api Ho, 11/6/2020, 12:		

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

New User Driver

Information

* Driver Name	User Kirby Seif
License Number	User Driver Integration Id 9OKVXBDR26WWQZTXIX
License State	Expiration Date
Spouse Driver	Comments

External Ids

External ID1

Cancel **Save & New** **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](#).

	User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1	Alvin Lynch	13AW6TE83QB1Y3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V3OIJUXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIJW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4	Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ039I7D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7	Ashley Nelson	UK2C9AKK3OILXAFAZYX	Field Sales					US

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

Accidents/Incidents						
Driver Name	Incident Date	Report Date	Comments	Created By	Last Modified By	New
1 Kirby Seif	8/9/2019	8/9/2019	API_ATC_DRIV_EVENT1	Api Ho, 11/6/2020, 12:10 PM	Api Ho, 11/6/2020, 12:1	
1 Records						
View All						

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

New User Driver Incident

Information

* Driver Name	User Kirby Seif
Incident Date	User Driver Incident Integration Id 62PDQ3XE26X1HSI62X
Report Date	Comments

External Ids

External ID1

[Cancel](#) [Save & New](#) [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](#).

User Name	User Integration Id	User Type	Territory Name	Territory Integration Id	Sales Force Name	Sales Force Integration Id	Region Name
1 Alvin Lynch	13AW6TE83QB1Y3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V30IJUXDF...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
3 Andy Stevenson	7E7CBDV530I0W352E...	Field Sales	MSL East North Central	QRFPACHD3QQLMSB...	MSL	Y6ZKSNIK230IJ890GTHL	US
4 Angelica Bennett	YJITNV4B3D04OZJLWP	Field Sales	Neurology Area 1	LHSCK6M3RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
5 Ann Peterson	TXT340GG30IQ03917D	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
6 Archana Bhatt	NK9UHXCS3OJ1QN0...	Field Sales					US
7 Ashley Nelson	UK2C9AKK30IJXAFAYX	Field Sales					US
8 30 of 107	...					

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**.

A screenshot of a web-based application interface titled 'Vehicles'. At the top, there are dropdown filters for 'License State' (CT), 'License Country' (United States), 'Comments', 'Created By' (Api Ho, 11/6/2020, 12:10 PM), and 'Last Modified By' (Aditi Kapoor, 11/13/2020). A context menu is open over a single record, with the 'Edit' option highlighted by a red box. Other options in the menu include 'New' and 'Delete'.

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

A screenshot of the 'Edit User Vehicle' form. The form is divided into sections: 'Information' (containing fields for Make, Model, Year, Color, VIN, Comments, User, User Vehicle Integration Id, License Plate Number, License State, License Country), and 'Actions' (containing 'Cancel', 'Save & New', and 'Save' buttons). The 'Save' button is highlighted with a red box.

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](#).

User List								
	User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1	Alvin Lynch	13AW6TE83QB1Y3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V30IUXDF...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
3	Andy Stevenson	7E7CBDV530IWI352E...	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
4	Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
5	Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Vaccine West Area	JUJPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales					US
7	Ashley Nelson	UK2C9AKK3OILXAFAZY	Field Sales					

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**.

Drivers					
License State	Expiration Date	Comments	Created By	Last Modified By	
DE	9/29/2028	API_ATC_TEST_COMMENT	Api Ho, 11/6/2020, 12:10 PM	Api Ho, 11/6/2020, 12:10	Edit Delete
1 Records					
View All					

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

Edit User Driver

Information

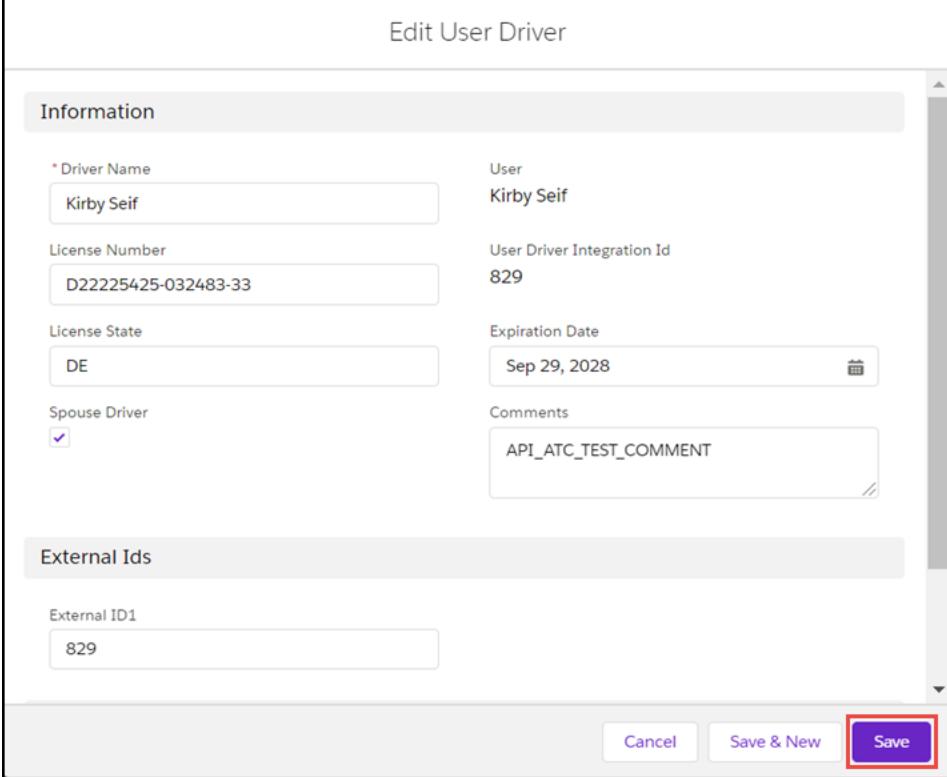
* Driver Name Kirby Seif	User Kirby Seif
License Number D22225425-032483-33	User Driver Integration Id 829
License State DE	Expiration Date Sep 29, 2028
Spouse Driver <input checked="" type="checkbox"/>	Comments API_ATC_TEST_COMMENT

External IDs

External ID1 829

Action Buttons

Cancel Save & New **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](#).

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	GLW3PV8X3OJ7E8RU11	US
2 Andres Cobb	DTQE045V30IJUJDF...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
3 Andy Stevenson	7E7CBDV530IW352E...	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK230J890GTHL	US
4 Angelica Bennett	YJITNV4B3OJ4OZILWP	Field Sales	Neurology Area 1	LHSCK6MI3RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
5 Ann Peterson	TXT340GG30IQ03917D	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
6 Archana Bhatt	NK9UHXC530J1QN0...	Field Sales					
7 Ashley Nelson	UK2C9AKK30ILXAFAKY	Field Sales					

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**.

Accidents/Incidents

Driver Name ↑	Incident D...	Report Date	Comments	Created By	Last Modified By
Kirby Seif	8/9/2019	8/9/2019	API_ATC_DRIV_EVE...	Api Ho, 11/6/2020, 12:10 PM	Api Ho, 11/6/2020, :

1 Records

[View All](#)

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

Edit User Driver Incident

Information

* Driver Name	User
Kirby Seif	Kirby Seif
Incident Date	User Driver Incident Integration Id
Aug 9, 2019	833
Report Date	Comments
Aug 9, 2019	API_ATC_DRIV_EVENT1

External Ids

External ID1	833
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Audit Information

Created By	Last Modified By
------------	------------------

[Cancel](#) [Save & New](#) **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](#).

	User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1	Alvin Lynch	13AW6TE83QB1Y3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQEO45V3OIJXDF...	Field Sales					US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC7...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
4	Angelica Bennett	YJITNV4B3OJ4OZJLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5	Ann Peterson	TXT340GG3OIQ039I7D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
7	Ashley Nelson	UK2C9AKK3OILXAFAZYX	Field Sales					US

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**.

Vehicles

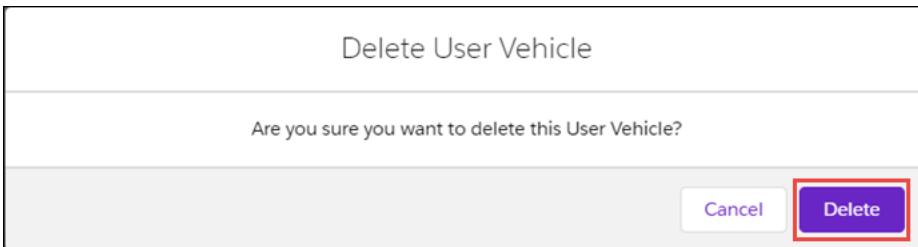
License State	License Country	Comments	Created By	Last Modified By
CT	United States		Api Ho, 11/6/2020, 12:10 PM	Aditi Kapoor, 11/13/2020,

1 Records

[View All](#)

Edit **Delete**

- 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

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

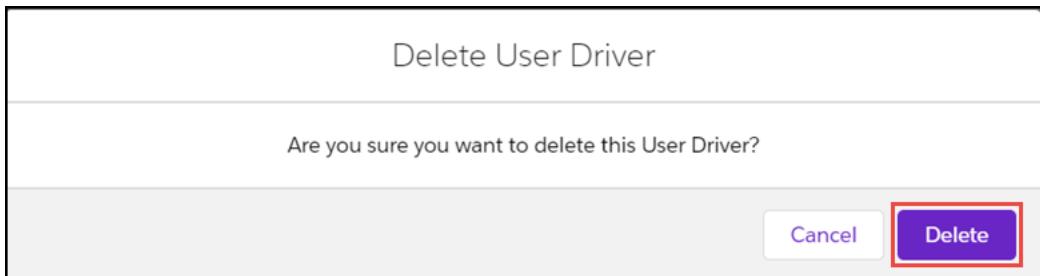
Note: Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions](#).

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXH4V3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2 Andres Cobb	DTQE045V3OIJUXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIJW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4 Angelica Bennett	YJTNV4B3OJ4OZLWP	Field Sales	MSL East North Central	QRFPACHD3QOLMS8...	MSL	Y6ZKSNK23OJB90GTHL	US
5 Ann Peterson	XT340GG3OIQ039I7D	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIFO...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXCS3OJ1QNO...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7 Ashley Nelson	UK2C9AKK3OILXAFAYX	Field Sales					US
30 of 107							

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

Drivers					
License State	Expiration Date	Comments	Created By	Last Modified By	
DE	9/29/2028	API_ATC_TEST_COMMER...	Api Ho, 11/6/2020, 12:10 PM	Api Ho, 11/6/2020,	Edit Delete
< 1 Records					
View All					

- 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

- Click **Users** from the primary navigation bar.
- Click the user whose accident or incident record you want to end date.

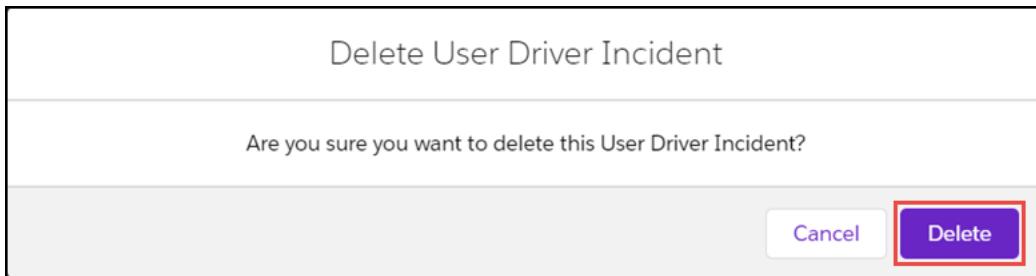
Note: Use the **Search** and **Filters** functions to help you locate the user. See [Search and Filter Functions.](#)

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID	Region Name
1 Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
2 Andres Cobb	DTQE045V3OIJXDF...	Field Sales					US
3 Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
4 Angelica Bennett	YIJTNV4B3QJ4OZLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
5 Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
6 Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RUI1	US
7 Ashley Nelson	UK2C9AKK3OILXAFAZYX	Field Sales					US
8
30 of 107							

- 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**.

Accidents/Incidents					
Incident Date	Report Date	Comments	Created By	Last Modified By	
8/9/2019	8/9/2019	API_ATC_DRIV_EVENT1	Api Ho, 11/6/2020, 12:10 PM	Api Ho, 11/6/2020, 12:1	Edit Delete
1 Records					
View All					

- 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	13AW6TE83QB1Y3MT...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
2	Andres Cobb	DTQE045V3OIJUXDF...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
3	Andy Stevenson	7E7CBDV53OIW352E...	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
4	Angelica Bennett	YJJTNV4B3OJ4OZJLWP	Field Sales	Neurology Area 1	LHSCK6M13RUKA1OF...	Neurology	PSTOAPZU3OJDAP4U...	US
5	Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Vaccine West Area	JUJPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
6	Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales					US
7	Ashley Nelson	UK2C9AKK3OILXAFAZY	Field Sales					

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

Field Titles
0 of 0

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

New User Field Title

Information	
User Name Clara Bowers	End Date
* Effective Date <input type="text"/>	Field Title Reason <input type="text"/>
* Field Title <input type="text"/> Search Field Titles... <input type="button" value="Q"/>	
User Field Title Integration Id M190C4JFSYV53NTAU1	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="outline: 2px solid red; border-radius: 5px;" type="button" value="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.

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

A screenshot of a user search results table. The columns include User Name, User Integration ID, User Type, Territory Name, Territory Integration ID, Sales Force Name, Sales Force Integration ID, and Region Name. There are 107 users listed, with the current page showing 30 of them. The table has a header row with sorting and filtering options.

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

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

A screenshot of the Field Titles table. It shows one record: Senior Representative. The table includes columns for Field Title, Field Title Reason, Effective Date, End Date, Created By, Last Modified By, and a status indicator. The 'Edit' button is highlighted with a red box.

- 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

- Click **Territories** from the primary navigation bar.
- Select the territory that contains the user to which you want to add a field title.

Territories

As Of Date | Nov 3, 2021 | Export

Territory Name	Territory Integration Id	Territory Type	Sales Force Name	User Name	Region Name	Effective Date	End Date
1 Neurology Alabama	ONSATU03RUKA1AMPW9	Territory	Neurology	US	6/1/2021		
2 Neurology Alaska	KOL042203RUKA1AMPAW	Territory	Neurology	US	6/1/2021		
3 Neurology Arizona	TULZRCR83RUKA1MMX3	Territory	Neurology	US	6/1/2021		
4 Neurology Arkansas	K7M0A2BGS3RUKA1MMX4	Territory	Neurology	US	6/1/2021		
5 Neurology California	3220TQW3RUKA1A5BV	Territory	Neurology	US	6/1/2021		
6 Neurology Colorado	E27RH2H263RUKA1D01R	Territory	Neurology	US	6/1/2021		
7 Neurology Connecticut	WMT9V9MA3RUKA1ND1S	Territory	Neurology	US	6/1/2021		
8 Neurology Dist of Columbia	OLK9V9B3RUKA1NKNX	Territory	Neurology	US	6/1/2021		
9 Neurology Delaware	HMMN5EV1RUKA1NKRM	Territory	Neurology	US	6/1/2021		
10 Neurology Florida	X6B01113RUKA1NHH	Territory	Neurology	US	6/1/2021		
11 Neurology Georgia	7YUJCKG3RUKA1O07A	Territory	Neurology	US	6/1/2021		
12 Neurology Hawaii	OAPAT9203RUKA1Q07B	Territory	Neurology	US	6/1/2021		
13 Neurology Idaho	6WWOV0RYRUKA1O07X4	Territory	Neurology	US	6/1/2021		
14 Neurology Illinois	NZTAPEBR3RUKA1Q0TX5	Territory	Neurology	Irma Santiago	US	6/1/2021	
15 Neurology Indiana	CGVWT2Z7RUKA1O7X6	Territory	Neurology	US	6/1/2021		
16 Neurology Iowa	L3F9RPF3RUKA1OFMZ	Territory	Neurology	Jamie Berry	US	6/1/2021	
17 Neurology Kansas	W1C8458K3RUKA1OFN0	Territory	Neurology	Ken Rhodes	US	6/1/2021	
18 Neurology Kentucky	FWD0B8P3RUKA1O0NCT	Territory	Neurology	Mitchell Cooper	US	6/1/2021	
19 Neurology Louisiana	UHNOVYMA3RUKA1ONCU	Territory	Neurology	Naomi Malone	US	6/1/2021	

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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**.

User Assignments											Edit	End Date
User Name	User Integration Id	User Type	Assignment Type	Is Pending	Sales Force Name	Sales Force Inte...	Effective Date	End Date	Created By	Last Modified By	Add Field Title	
1 Jamie Berry	4N0883K330IWMDBy4P	Field Sales	Primary		Neurology	PST0APZU30/OAP4U...	6/1/2021	12/31/2021	System Admin, 11...	System Admin, 11...		
1 of 1												
View All												

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

New User Territory Field Title

Information

User Name Jamie Berry	User Integration Id 4N0883K330IWMDBy4P
Territory Name Neurology Iowa	Territory Integration Id L3F9RPF3RUKA1OFMZ
Effective Date Jun 1, 2021	End Date 12/31/2021
Field Title Search Field Titles...	Field Title Reason

Cancel Save & New **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.

Territories										As Of Date	Nov 3, 2021	Export
Territory Name	Territory Integration Id	Territory Type	Sales Force Name	User Name	Region Name	Effective Date	End Date					
1 Neurology Alabama	ONSATL03RUKA1MPW9	Territory	Neurology	US	6/1/2021							
2 Neurology Alaska	KOL042203RUKA1MPWA	Territory	Neurology	US	6/1/2021							
3 Neurology Arizona	TUL0RCR03RUKA1MMX3	Territory	Neurology	US	6/1/2021							
4 Neurology Arkansas	K7M0AZBGSRUKA1MXM4	Territory	Neurology	US	6/1/2021							
5 Neurology California	3220TQW3RUKA1N5BV	Territory	Neurology	US	6/1/2021							
6 Neurology Colorado	E27RH2V63RUKA1D1R	Territory	Neurology	US	6/1/2021							
7 Neurology Connecticut	WMTBV9MA3RUKA1ND1S	Territory	Neurology	US	6/1/2021							
8 Neurology Dist of Columbia	OLKVBV3RUKA1NKXK	Territory	Neurology	US	6/1/2021							
9 Neurology Delaware	HMXENGEY3RUKA1NKXK	Territory	Neurology	US	6/1/2021							
10 Neurology Florida	X6B01113RUKA1N5HH	Territory	Neurology	US	6/1/2021							
11 Neurology Georgia	TYLCKCG03RUKA1O07A	Territory	Neurology	US	6/1/2021							
12 Neurology Hawaii	GAPA79203RUKA1Q07B	Territory	Neurology	US	6/1/2021							
13 Neurology Idaho	6WWODVRYR3RUKA1D7X4	Territory	Neurology	US	6/1/2021							
14 Neurology Illinois	NZTAPEER3RUKA1Q7X5	Territory	Neurology	Irma Santiago	US	6/1/2021						
15 Neurology Indiana	CGWV7Z7R3RUKA1Q7X6	Territory	Neurology	US	6/1/2021							
16 Neurology Iowa	L3F8P8P3R3RUKA1QF0M2	Territory	Neurology	Jamie Berry	US	6/1/2021						
17 Neurology Kansas	W1C8458X3RUKA1OFN0	Territory	Neurology	Ken Rhodes	US	6/1/2021						
18 Neurology Kentucky	FWD0JB8P3R3RUKA1QNC7	Territory	Neurology	Mitchell Cooper	US	6/1/2021						
19 Neurology Louisiana	UHMOYKMA3R3RUKA1ONCU	Territory	Neurology	Naomi Malone	US	6/1/2021						
100 of 3200												

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

Field Titles										Export
User Name	User Integration Id	Field Title	Field Title Reason	Is Pending	Effective Date	End Date	Created By	Last Modified By		
1 Irma Santiago	16A3HSJ830Z8T27IH	Representative			6/1/2021	12/31/2021	System Admin, 11/3/2021, 7:09 AM	System Admin, 11/3/2021	Edit	
1 of 1										View All

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

Edit User Territory Field Title

Information	
User Name Irma Santiago	User Integration Id 16A3H5J83OIZ3T27iH
Territory Name Neurology Illinois	Territory Integration Id NZTAP68R3RUKAI07X5
*Effective Date <input type="text" value="Jun 1, 2021"/>	End Date 12/31/2021
*Field Title <input type="text" value="Senior Representative"/>	Field Title Description <input type="text"/>
Audit Information	
Created By System Admin, 11/3/2021, 5:42 AM	Last Modified By System Admin, 11/3/2021, 5:44 AM
<input type="button" value="Cancel"/> <input type="button" value="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 Information](#)
- [Geography 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](#).

Geographies											As Of Date	Feb 4, 2022	New	Import CSV	Export	Bulk Export
	Geography Name	Geography Integration ID	Type	Geography Code	City	State	Country	Region Name	Effective Date	End Date						
1	POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	United States	US	12/4/2019							
2	POST-00001	130008322896	Postal Code	00001	Unknown	CA	United States	US	12/4/2019							
3	POST-00006	13001834511	Postal Code	00396	San Juan	PR	United States	US	12/4/2019							
4	POST-00040	130008322898	Postal Code	00400	Pleasantville	NY	United States	US	12/4/2019							
5	POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US	12/4/2019							
6	POST-00501	130009573481	Postal Code	00501	Holtsville	NY	United States	US	12/4/2019							
7	POST-00544	130009574483	Postal Code	00544	Holtsville	NY	United States	US	12/4/2019							
8	POST-00600	130008295678	Postal Code	00600	Unofficial Zip	ZZ	United States	US	12/4/2019							
9	POST-00601	120001810266	Postal Code	00601	Ajuntas	PR	United States	US	12/4/2019							
10	POST-00602	120001810269	Postal Code	00602	Aguada	PR	United States	US	12/4/2019							
11	POST-00603	120001810273	Postal Code	00603	Aguadilla	PR	United States	US	12/4/2019							
12	POST-00604	120001810277	Postal Code	00604	Aguadilla	PR	United States	US	12/4/2019							
13	POST-00605	120001810281	Postal Code	00605	Aguadilla	PR	United States	US	12/4/2019							
14	POST-00606	120001810268	Postal Code	00606	Barceloneta	PR	United States	US	12/4/2019							
15	POST-00610	120001810271	Postal Code	00610	Anasco	PR	United States	US	12/4/2019							
16	POST-00611	120001810276	Postal Code	00611	Angelos	PR	United States	US	12/4/2019							
17	POST-00612	120001810279	Postal Code	00612	Arecibo	PR	United States	US	12/4/2019							
X 1000 Rows Selected																

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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	Dec 8, 2020	
------------	-------------	--

- 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 POST-01001	As Of Date	Feb 4, 2022		New	Edit	Delete	End Date
Geography Integration Id 9600500000029799	Geography Type Postal Code	Effective Date 1/1/2020	End Date				

- 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 POST-01001		As Of Date	Feb 4, 2022	New	Edit	Delete	End Date																								
Geography Integration Id 960050000029799	Geography Type Postal Code	Effective Date	1/1/2020	End Date																											
<table border="1"> <thead> <tr> <th>Details</th> <th>Details History-Time</th> <th>Hierarchy</th> </tr> </thead> <tbody> <tr> <td>Geography Name POST-01001</td> <td></td> <td>Geography Integration Id 960050000029799</td> </tr> <tr> <td>Effective Date 1/1/2020</td> <td></td> <td>End Date</td> </tr> <tr> <td>Geography Type Postal Code</td> <td></td> <td>Geography Code 01001</td> </tr> <tr> <td>Geography Description AGAWAM, MA</td> <td></td> <td>Region US</td> </tr> <tr> <td>City AGAWAM</td> <td></td> <td>State MA</td> </tr> <tr> <td>County</td> <td></td> <td>Country United States</td> </tr> <tr> <td>Extension</td> <td></td> <td></td> </tr> </tbody> </table>								Details	Details History-Time	Hierarchy	Geography Name POST-01001		Geography Integration Id 960050000029799	Effective Date 1/1/2020		End Date	Geography Type Postal Code		Geography Code 01001	Geography Description AGAWAM, MA		Region US	City AGAWAM		State MA	County		Country United States	Extension		
Details	Details History-Time	Hierarchy																													
Geography Name POST-01001		Geography Integration Id 960050000029799																													
Effective Date 1/1/2020		End Date																													
Geography Type Postal Code		Geography Code 01001																													
Geography Description AGAWAM, MA		Region US																													
City AGAWAM		State MA																													
County		Country United States																													
Extension																															

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

The screenshot shows a software application window titled "Geography POST-01001". At the top, there is a toolbar with buttons for "New", "Edit", "Delete", and "End Date". The main area displays geographical details for the entry "POST-01001". The fields shown include:

Geography Integration Id	Geography Type	Effective Date	End Date
960050000029799	Postal Code	1/1/2020	

Below this, a tabular view provides more detailed information:

Details	Geography Name	Geography Integration Id
	POST-01001	960050000029799
Effective Date	1/1/2020	End Date
Geography Type	Postal Code	Geography Code
		01001
Geography Description	AGAWAM, MA	Region
		US
City	AGAWAM	State
		MA
County		Country
		United States
Extension		

- **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 IDs	
External ID1	External ID2
External ID3	External ID4
External ID5	

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

Audit Information

Audit Information	
Created By om , 8/5/2020, 9:54 AM	Last Modified By om , 8/5/2020, 10:37 AM

- **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 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						

- **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 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						

- **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						
	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						
	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:

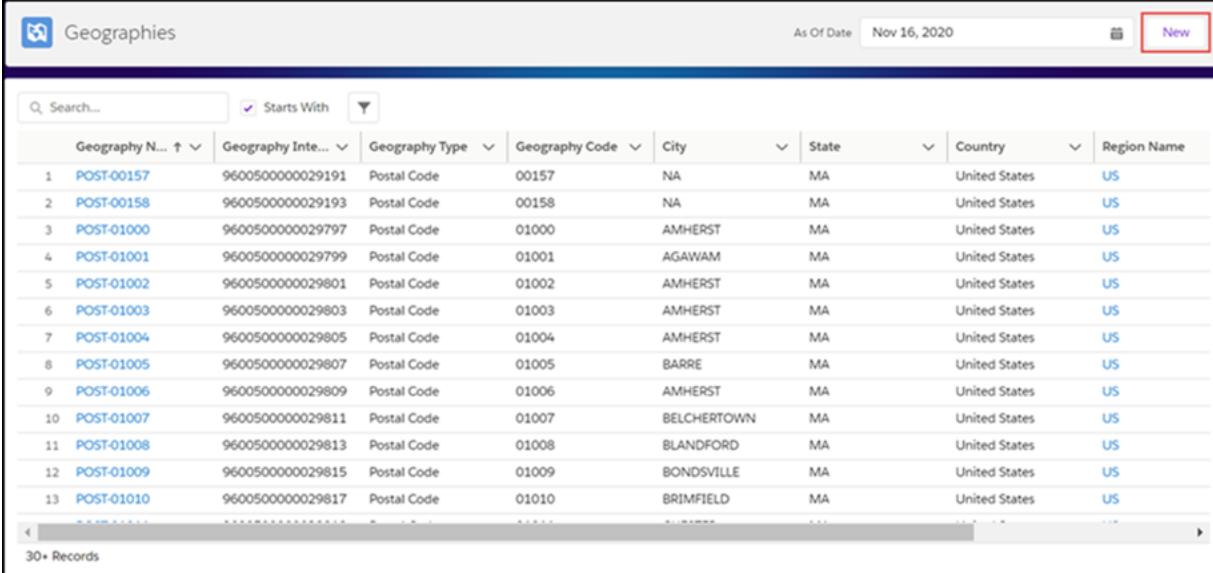
- [Add a Geography](#)
- [Modify a Geography](#)
- [Delete a Geography](#)
- [End Date a Geography](#)

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**.



Geography N...	Geography Inte...	Geography Type	Geography Code	City	State	Country	Region Name
1 POST-00157	9600500000029191	Postal Code	00157	NA	MA	United States	US
2 POST-00158	9600500000029193	Postal Code	00158	NA	MA	United States	US
3 POST-01000	9600500000029797	Postal Code	01000	AMHERST	MA	United States	US
4 POST-01001	9600500000029799	Postal Code	01001	AGAWAM	MA	United States	US
5 POST-01002	9600500000029801	Postal Code	01002	AMHERST	MA	United States	US
6 POST-01003	9600500000029803	Postal Code	01003	AMHERST	MA	United States	US
7 POST-01004	9600500000029805	Postal Code	01004	AMHERST	MA	United States	US
8 POST-01005	9600500000029807	Postal Code	01005	BARRE	MA	United States	US
9 POST-01006	9600500000029809	Postal Code	01006	AMHERST	MA	United States	US
10 POST-01007	9600500000029811	Postal Code	01007	BELCHERTOWN	MA	United States	US
11 POST-01008	9600500000029813	Postal Code	01008	BLANDFORD	MA	United States	US
12 POST-01009	9600500000029815	Postal Code	01009	BONDSTVILLE	MA	United States	US
13 POST-01010	9600500000029817	Postal Code	01010	BRIMFIELD	MA	United States	US

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

New Geography

Information

Geography Name	Geography Integration Id J19SBYPN27UL1OAKGP
* Effective Date	End Date
* Geography Type	* Geography Code
Select an Option	
Geography Description	* Region
	Search Regions... <input type="button" value="Q"/>
City	State
County	* Country
	Select an Option
Extension	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="background-color: #0070C0; color: white; border: 2px solid #0070C0; border-radius: 5px; padding: 2px 10px; font-weight: bold; font-size: 10pt; margin-right: 10px;" type="button" value="Save"/>	

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

Modify a Geography

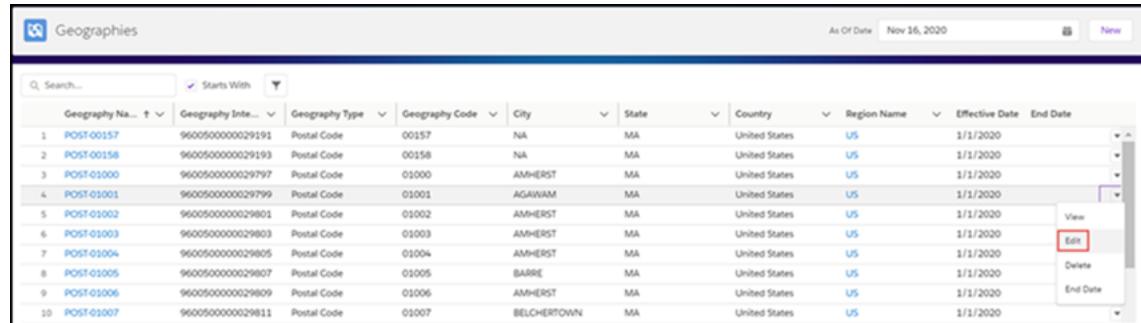
You can make updates to the information of an existing geography.

To edit a geography

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

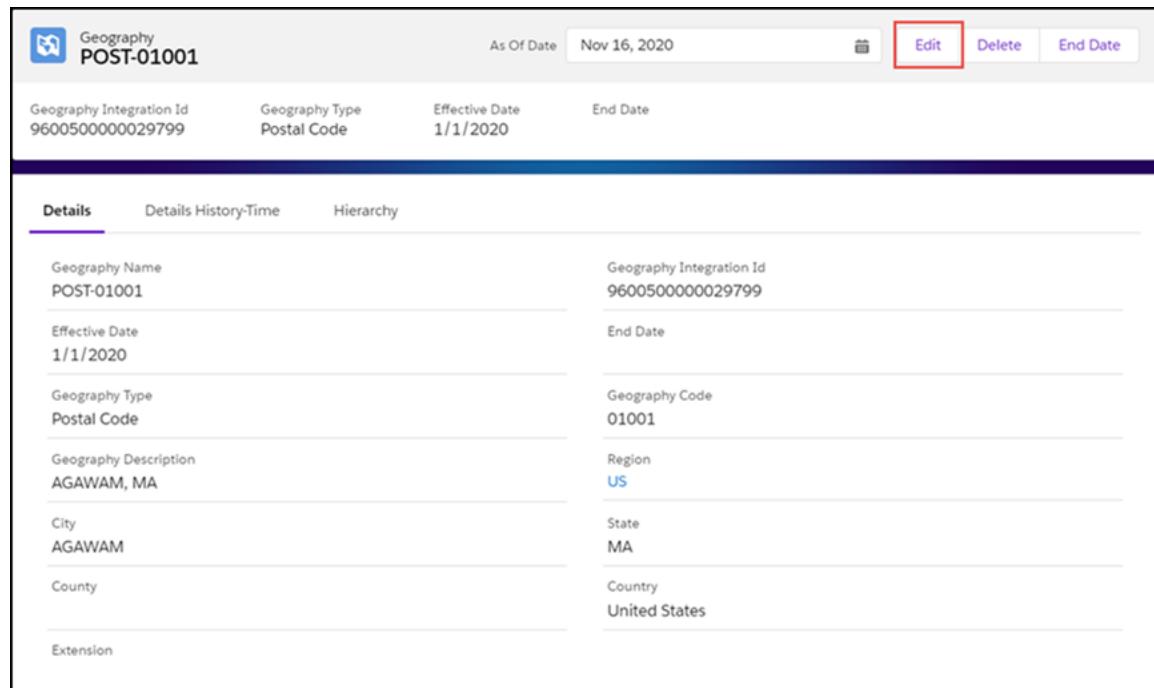
Note: Use the **Search**  and **Filters**  functions to help you locate the geography. See [Search and Filter Functions](#).

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



A screenshot of a web-based application interface titled "Geographies". The page shows a table of 10 geographical entries. The columns include Geography Name, Geography Integration Id, Geography Type, Geography Code, City, State, Country, Region Name, Effective Date, and End Date. The "Edit" option in the dropdown menu for the first entry (POST-01001) is highlighted with a red box.

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



A screenshot of the "Geography Details" page for "POST-01001". The top navigation bar includes "Geography", "POST-01001", "As Of Date" (Nov 16, 2020), and buttons for "Edit" (highlighted with a red box), "Delete", and "End Date". The main content area displays geographical details in a grid format:

Geography Integration Id	Geography Type	Effective Date	End Date
9600500000029799	Postal Code	1/1/2020	

Below this, there are tabs for "Details", "Details History-Time", and "Hierarchy". The "Details" tab is active. The "Details" section contains the following fields:

Geography Name POST-01001	Geography Integration Id 9600500000029799
Effective Date 1/1/2020	End Date
Geography Type Postal Code	Geography Code 01001
Geography Description AGAWAM, MA	Region US
City AGAWAM	State MA
County	Country United States
Extension	

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

Edit POST-01001

Information

Geography Name POST-01001	Geography Integration Id 9600500000029799
* Effective Date Jan 1, 2020	End Date
* Geography Type Postal Code	* Geography Code 01001
Geography Description AGAWAM, MA	* Region US
City AGAWAM	State MA
County	* Country United States
Extension	

Buttons: Cancel, Save & New, Save (highlighted with a red box)

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**.

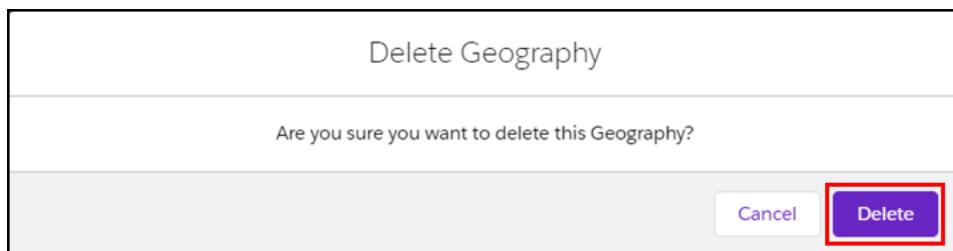
	Geography Name	Geography Inte...	Geography Type	Geography Code	City	State	Country	Region Name	Effective Date	End Date	
1	POST-00157	9600500000029191	Postal Code	00157	NA	MA	United States	US	1/1/2020		
2	POST-00158	9600500000029193	Postal Code	00158	NA	MA	United States	US	1/1/2020		
3	POST-01000	9600500000029797	Postal Code	01000	AMHERST	MA	United States	US	1/1/2020		
4	POST-01001	9600500000029799	Postal Code	01001	AGAWAM	MA	United States	US	1/1/2020		
5	POST-01002	9600500000029801	Postal Code	01002	AMHERST	MA	United States	US	1/1/2020		
6	POST-01003	9600500000029803	Postal Code	01003	AMHERST	MA	United States	US	1/1/2020		
7	POST-01004	9600500000029805	Postal Code	01004	AMHERST	MA	United States	US	1/1/2020		
8	POST-01005	9600500000029807	Postal Code	01005	BARRE	MA	United States	US	1/1/2020		
9	POST-01006	9600500000029809	Postal Code	01006	AMHERST	MA	United States	US	1/1/2020		

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

Geography Integration Id: 9600500000029799
Geography Type: Postal Code
Effective Date: 1/1/2020
End Date:

Details	Details History-Time	Hierarchy
Geography Name: POST-01001	Geography Integration Id: 9600500000029799	
Effective Date: 1/1/2020	End Date:	
Geography Type: Postal Code	Geography Code: 01001	
Geography Description: AGAWAM, MA	Region: US	
City: AGAWAM	State: MA	
County:	Country: United States	
Extension:		

- Click **Delete** to confirm.



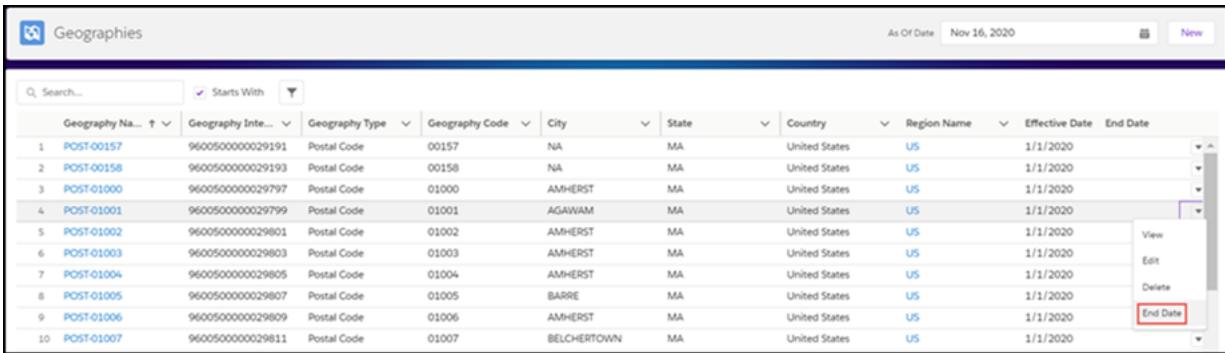
End Date a Geography

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

To end date a geography

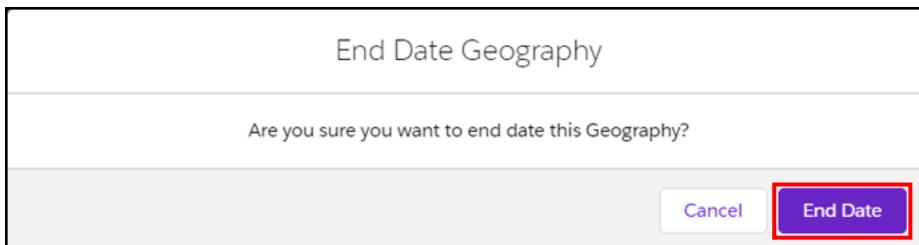
1. Click **Geographies** from the primary navigation bar.
2. Select the drop-down for the geography you want to remove and click **End Date**.

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



Geography Name	Geography Internal ID	Geography Type	Geography Code	City	State	Country	Region Name	Effective Date	End Date
1 POST-00157	9600500000029191	Postal Code	00157	NA	MA	United States	US	1/1/2020	
2 POST-00158	9600500000029193	Postal Code	00158	NA	MA	United States	US	1/1/2020	
3 POST-01000	9600500000029797	Postal Code	01000	AMHERST	MA	United States	US	1/1/2020	
4 POST-01001	9600500000029799	Postal Code	01001	AGAWAM	MA	United States	US	1/1/2020	
5 POST-01002	9600500000029801	Postal Code	01002	AMHERST	MA	United States	US	1/1/2020	
6 POST-01003	9600500000029803	Postal Code	01003	AMHERST	MA	United States	US	1/1/2020	
7 POST-01004	9600500000029805	Postal Code	01004	AMHERST	MA	United States	US	1/1/2020	
8 POST-01005	9600500000029807	Postal Code	01005	BARRE	MA	United States	US	1/1/2020	
9 POST-01006	9600500000029809	Postal Code	01006	AMHERST	MA	United States	US	1/1/2020	
10 POST-01007	9600500000029811	Postal Code	01007	BELCHERTOWN	MA	United States	US	1/1/2020	

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

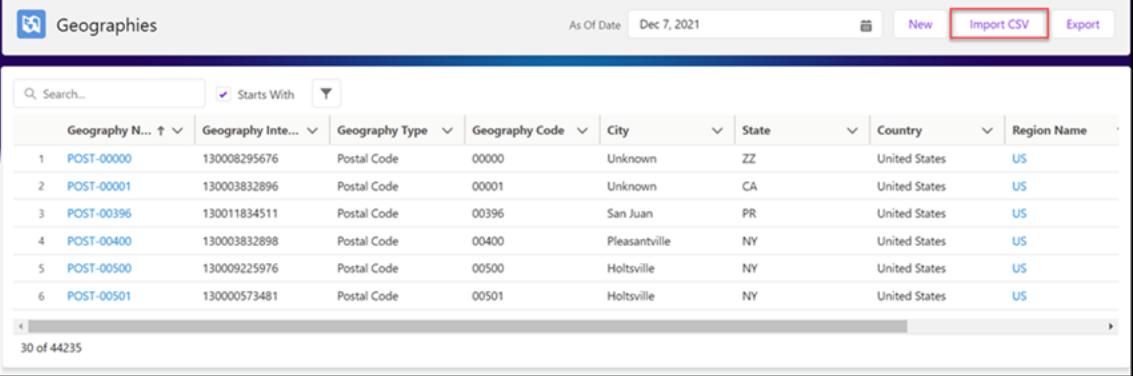


Import Geography Data Using CSV Files

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.

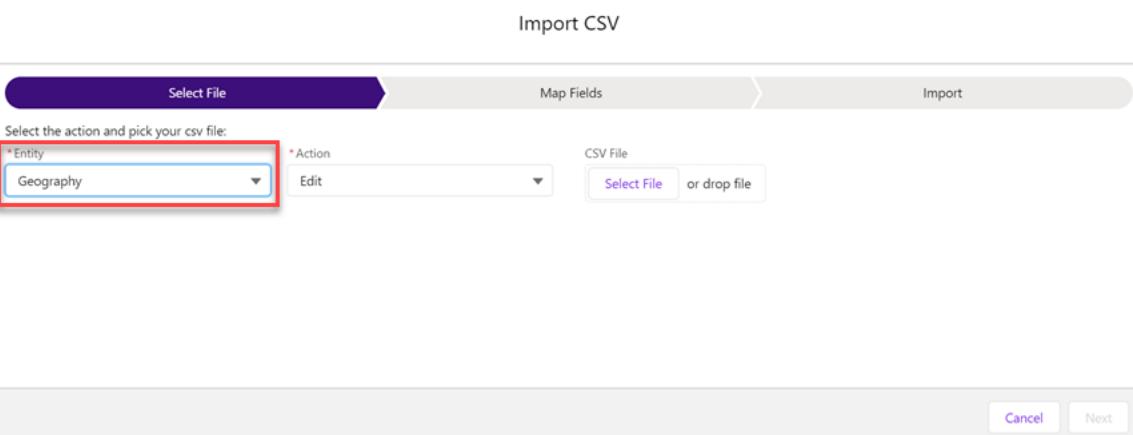
To import data into Geographies

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



Geography N...	Geography Int...	Geography Type	Geography Code	City	State	Country	Region Name
1 POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	United States	US
2 POST-00001	130003832896	Postal Code	00001	Unknown	CA	United States	US
3 POST-00396	130011834511	Postal Code	00396	San Juan	PR	United States	US
4 POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	United States	US
5 POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US
6 POST-00501	130000573481	Postal Code	00501	Holtsville	NY	United States	US

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



Import CSV

Select the action and pick your csv file:

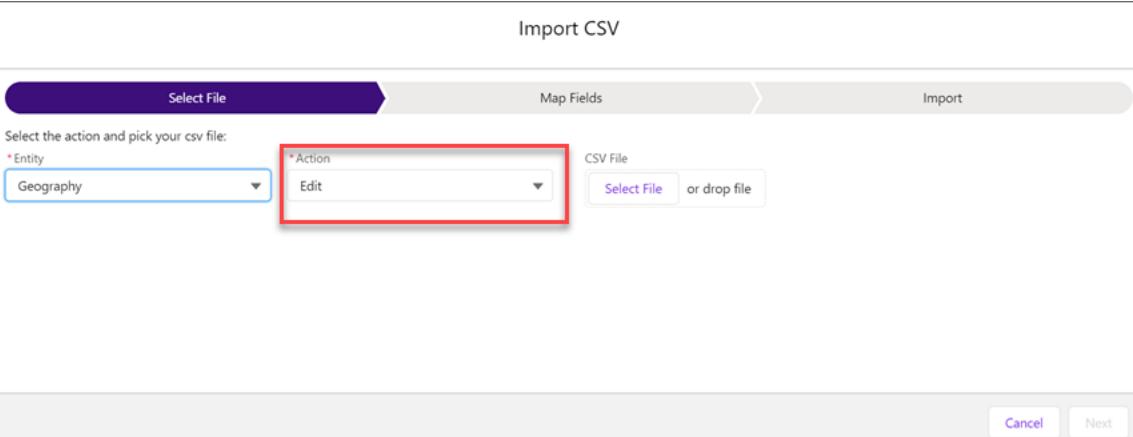
* Entity: Geography

* Action: Edit

CSV File: or drop file

Cancel Next

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



Import CSV

Select the action and pick your csv file:

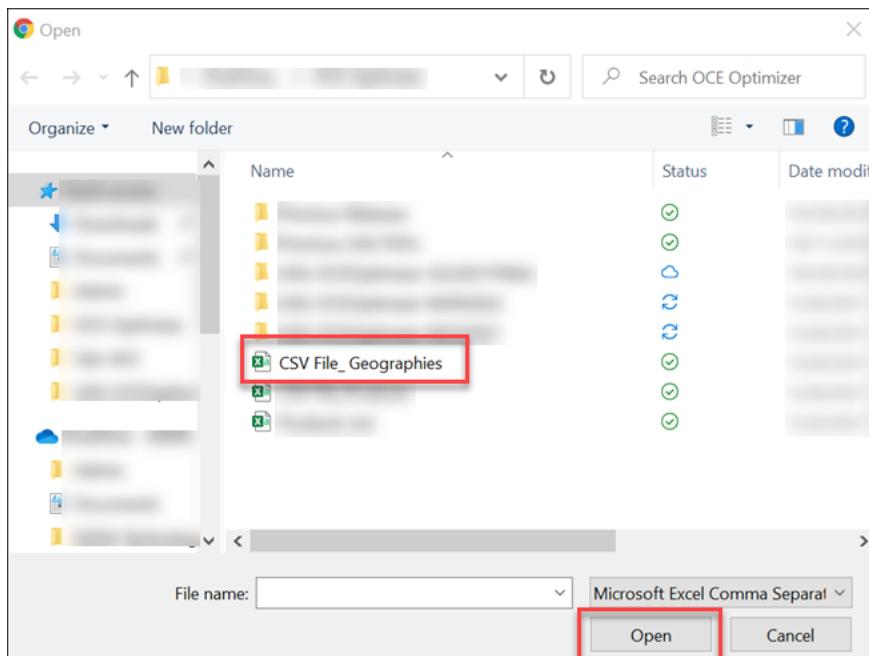
* Entity: Geography

* Action: Edit

CSV File: or drop file

Cancel Next

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

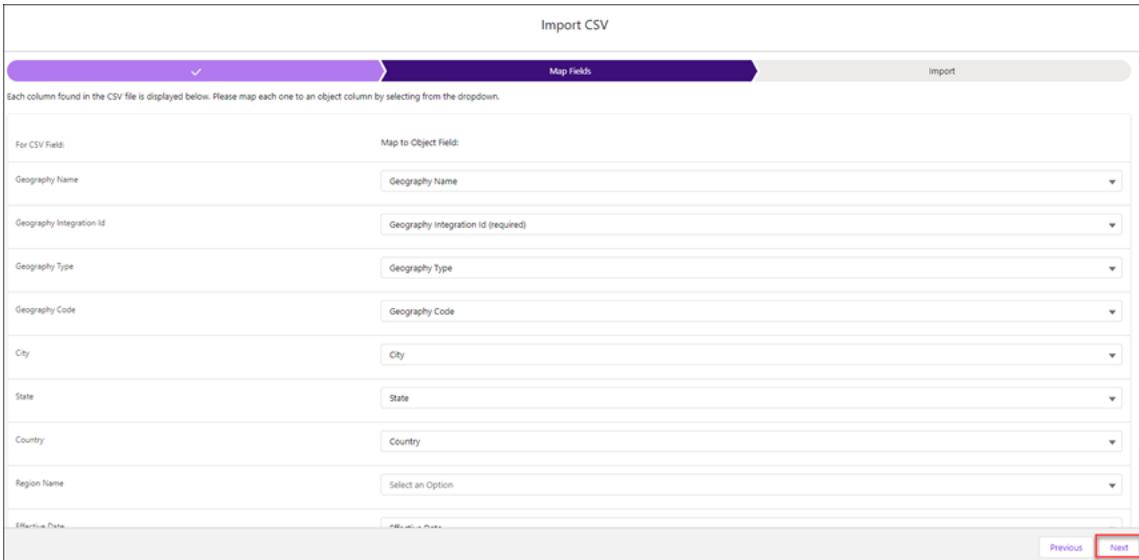


5. Verify the data in the **Data Preview** section, then click **Next**.

Geograph...	Geograph...	Geograph...	Geograph...	City	State	Country	Region N...	Effective ...	End Date
GEO1-07828	960051000004...	Geography 1	07828	BUDD LAKE	NJ	United States	Salinas Valley	12/4/2019	12/31/3999
GEO1-07830	960051000004...	Geography 1	07830	CALIFON	NJ	United States	Salinas Valley	12/4/2019	12/31/3999
GEO1-07837	960051000004...	Geography 1	07837	GLASSER	NJ	United States	Salinas Valley	12/4/2019	12/31/3999
GEO1-07845	960051000004...	Geography 1	07845	IRONIA	NJ	United States	Salinas Valley	12/4/2019	12/31/3999

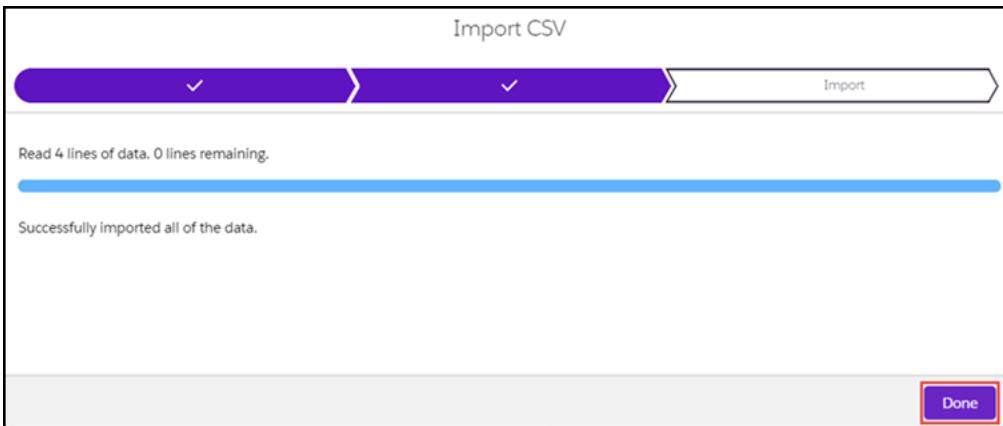
The system automatically maps each column in the csv file to an Object Field and indicates which fields are required.

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



The screenshot shows the 'Import CSV' interface with the 'Map Fields' tab selected. It displays a list of CSV fields on the left and their corresponding object fields on the right. The fields include Geography Name, Geography Integration Id, Geography Type, Geography Code, City, State, Country, Region Name, and Effective Date. Each field has a dropdown menu next to it. At the bottom right, there are 'Previous' and 'Next' buttons, with 'Next' being highlighted.

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



The screenshot shows the 'Import CSV' interface after successful import. It displays a message 'Read 4 lines of data. 0 lines remaining.' followed by a progress bar indicating completion. Below that, it says 'Successfully imported all of the data.' At the bottom right, there is a 'Done' button, which is highlighted with a red box.

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](#)

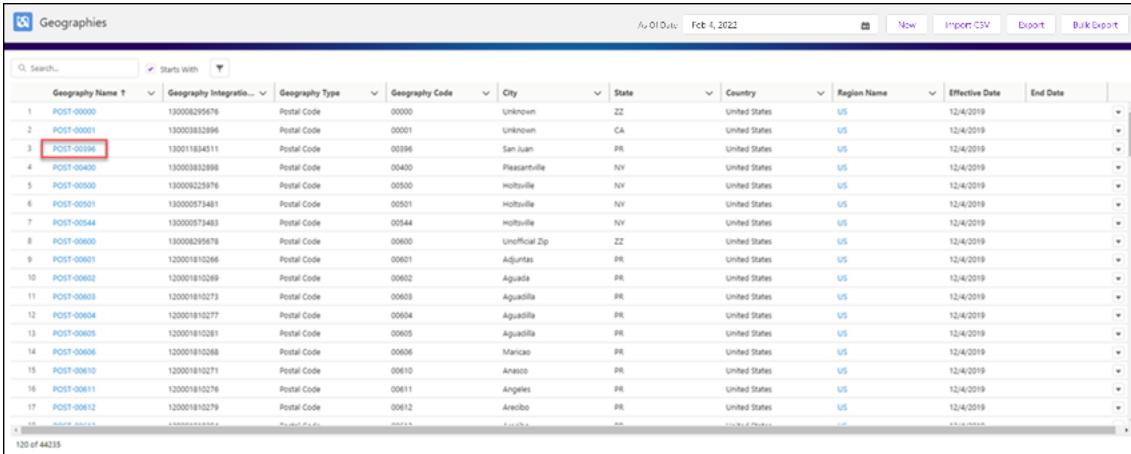
Add a Parent Hierarchy to a Geography

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](#).



The screenshot shows a data grid titled "Geographies". The columns include: Geography Name, Geography Integration ID, Geography Type, Geography Code, City, State, Country, Region Name, Effective Date, and End Date. A row with the ID "POST-00396" is highlighted with a red box. The grid has 17 rows of data. At the bottom left, it says "120 of 44235".

Geography Name	Geography Integration ID	Geography Type	Geography Code	City	State	Country	Region Name	Effective Date	End Date
1 POST-00000	130006295676	Postal Code	00000	Unknown	ZZ	United States	US	12/4/2019	
2 POST-00001	130003832996	Postal Code	00001	Unknown	CA	United States	US	12/4/2019	
3 POST-00396	130011834511	Postal Code	00396	San Juan	PR	United States	US	12/4/2019	
4 POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	United States	US	12/4/2019	
5 POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US	12/4/2019	
6 POST-00501	130005074481	Postal Code	00501	Holtsville	NY	United States	US	12/4/2019	
7 POST-00544	130008274483	Postal Code	00544	Holtsville	NY	United States	US	12/4/2019	
8 POST-00600	130008295978	Postal Code	00600	Unofficial Zip	ZZ	United States	US	12/4/2019	
9 POST-00601	120001810266	Postal Code	00601	Adjuntas	PR	United States	US	12/4/2019	
10 POST-00602	120001810269	Postal Code	00602	Aguadilla	PR	United States	US	12/4/2019	
11 POST-00603	120001810273	Postal Code	00603	Aguadilla	PR	United States	US	12/4/2019	
12 POST-00604	120001810277	Postal Code	00604	Aguadilla	PR	United States	US	12/4/2019	
13 POST-00605	120001810281	Postal Code	00605	Aguadilla	PR	United States	US	12/4/2019	
14 POST-00606	120001810288	Postal Code	00606	Maricao	PR	United States	US	12/4/2019	
15 POST-00610	120001810271	Postal Code	00610	Anasco	PR	United States	US	12/4/2019	
16 POST-00611	120001810276	Postal Code	00611	Angelus	PR	United States	US	12/4/2019	
17 POST-00612	120001810279	Postal Code	00612	Arecibo	PR	United States	US	12/4/2019	

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

New Geography Hierarchy

Information

* Parent Geography Name Search Geographies... <input type="button" value="🔍"/>	Child Geography Name POST-01001
* Effective Date <input type="button" value="📅"/>	End Date <input type="button" value="📅"/>
Geography Hierarchy Integration Id K8NR1H5Q27V9LYJVJD	
External Ids	
External ID1 <input type="text"/>	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="outline: 2px solid red; border-radius: 5px; padding: 2px 10px;" type="button" value="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](#).

Geographies											Avail Date	Feb 1, 2023				
	Geography Name	Geography Integration ID	Geography Type	Geography Code	City	State	Country	Region Name	Effective Date	End Date						
1	POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	United States	US	12/4/2019							
2	POST-00001	130008312896	Postal Code	00001	Unknown	CA	United States	US	12/4/2019							
3	POST-00006	130011834511	Postal Code	00396	San Juan	PR	United States	US	12/4/2019							
4	POST-00040	130008312898	Postal Code	00400	Pleasantville	NY	United States	US	12/4/2019							
5	POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US	12/4/2019							
6	POST-00501	130009173481	Postal Code	00501	Holtsville	NY	United States	US	12/4/2019							
7	POST-00544	130009173483	Postal Code	00544	Holtsville	NY	United States	US	12/4/2019							
8	POST-00600	130008295678	Postal Code	00600	Unofficial Zip	ZZ	United States	US	12/4/2019							
9	POST-00601	120001810266	Postal Code	00601	Ajuntas	PR	United States	US	12/4/2019							
10	POST-00602	120001810269	Postal Code	00602	Aguada	PR	United States	US	12/4/2019							
11	POST-00603	120001810273	Postal Code	00603	Aguadilla	PR	United States	US	12/4/2019							
12	POST-00604	120001810277	Postal Code	00604	Aguadilla	PR	United States	US	12/4/2019							
13	POST-00605	120001810281	Postal Code	00605	Aguadilla	PR	United States	US	12/4/2019							
14	POST-00606	120001810268	Postal Code	00606	Barcabo	PR	United States	US	12/4/2019							
15	POST-00610	120001810271	Postal Code	00610	Anasco	PR	United States	US	12/4/2019							
16	POST-00611	120001810276	Postal Code	00611	Angelos	PR	United States	US	12/4/2019							
17	POST-00612	120001810279	Postal Code	00612	Arecibo	PR	United States	US	12/4/2019							
X 1000 Rows																

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

Geography Parents											
Geography Name	Geography Integration ID	Geography Type	Effective Date	End Date	Created By	Last Modified By					
1 POST-10553	120001817514	Postal Code	8/27/2021	10/31/2021	Amit Choudhury, 8/27/2021, 10:4	Amit Choudhury, 8/27/2021, 10:4					
1 Records											
View All											

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

Edit Geography Hierarchy

Information

* Parent Geography Name POST-01002	X	Child Geography Name POST-01001
* Effective Date Nov 13, 2020	▼	End Date
Geography Hierarchy Integration Id 1I9B07GB27V7TG94GP		

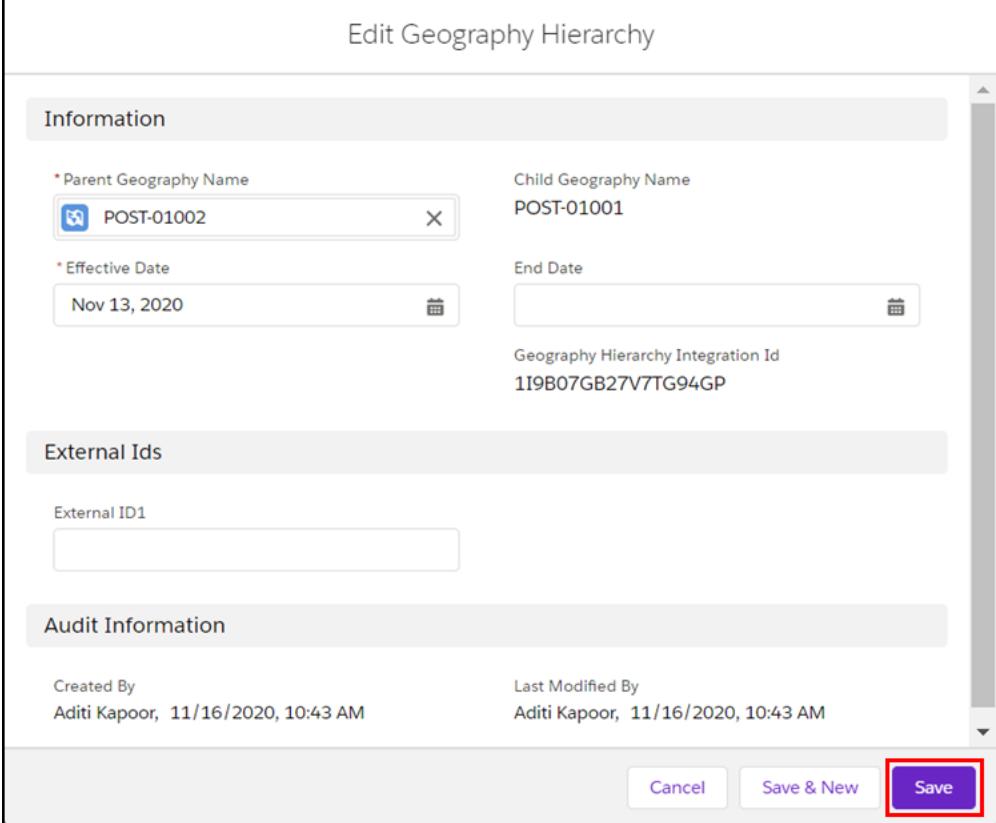
External Ids

External ID1

Audit Information

Created By Aditi Kapoor, 11/16/2020, 10:43 AM	Last Modified By Aditi Kapoor, 11/16/2020, 10:43 AM
--------------------------------------------------	--------------------------------------------------------

Cancel Save & New **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.

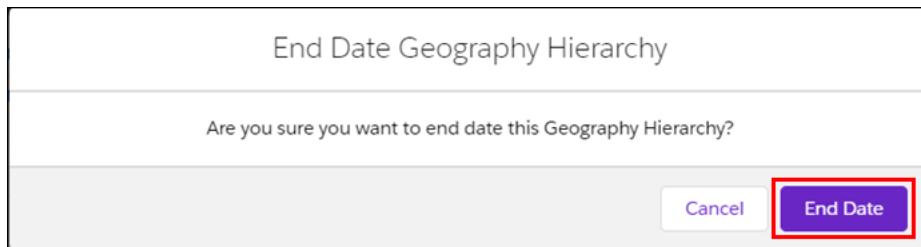
Note: Use the **Search**  and **Filters**  functions to help you locate the geography. See [Search and Filter Functions](#).

Geography Name	Geography Integration ID	Type	Code	City	State	Country	Region Name	Effective Date	End Date
POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	United States	US	12/4/2019	
POST-00001	130008312896	Postal Code	00001	Unknown	CA	United States	US	12/4/2019	
POST-00905	13001834511	Postal Code	00396	San Juan	PR	United States	US	12/4/2019	
POST-00400	130008312896	Postal Code	00400	Pleasantville	NY	United States	US	12/4/2019	
POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US	12/4/2019	
POST-00501	130005173481	Postal Code	00501	Holtsville	NY	United States	US	12/4/2019	
POST-00544	130005173483	Postal Code	00544	Holtsville	NY	United States	US	12/4/2019	
POST-00600	130008295676	Postal Code	00600	Unofficial Zip	ZZ	United States	US	12/4/2019	
POST-00601	120001810266	Postal Code	00601	Ajuntas	PR	United States	US	12/4/2019	
POST-00602	120001810269	Postal Code	00602	Aguada	PR	United States	US	12/4/2019	
POST-00603	120001810273	Postal Code	00603	Aguadilla	PR	United States	US	12/4/2019	
POST-00604	120001810277	Postal Code	00604	Aguadilla	PR	United States	US	12/4/2019	
POST-00605	120001810281	Postal Code	00605	Aguadilla	PR	United States	US	12/4/2019	
POST-00606	120001810268	Postal Code	00606	Barceloneta	PR	United States	US	12/4/2019	
POST-00610	120001810271	Postal Code	00610	Anasco	PR	United States	US	12/4/2019	
POST-00611	120001810276	Postal Code	00611	Angelos	PR	United States	US	12/4/2019	
POST-00612	120001810279	Postal Code	00612	Arecibo	PR	United States	US	12/4/2019	

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

Geography Parents					
	Geography Integration ID	Type	Effective Date	End Date	Created By
	9600500000029801	Postal Code	11/13/2020		Aditi Kapoor, 11/1 Aditi Kapoor, 11/16/2020, 1

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



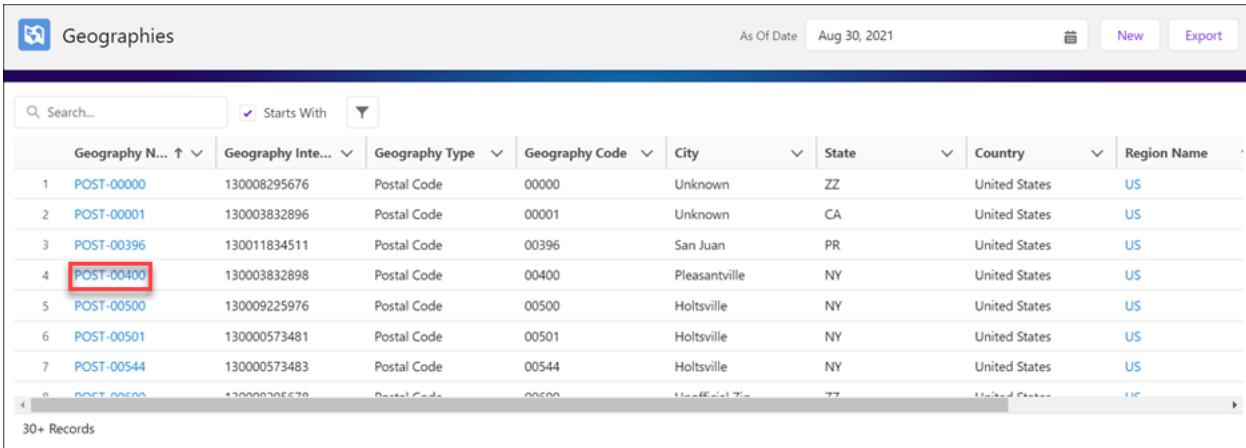
Delete a Parent Hierarchy Linked to a Geography

You can delete parent hierarchies linked to a geography.

To delete a parent hierarchy linked to a geography

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

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

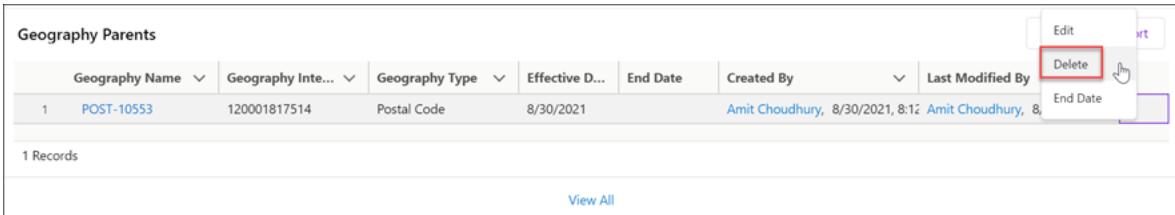


The screenshot shows a table titled "Geographies" with columns: Geography Name, Geography Int..., Geography Type, Geography Code, City, State, Country, and Region Name. There are 30+ Records listed. The row for "POST-00400" is highlighted with a red box.

	Geography N...	Geography Int...	Geography Type	Geography Code	City	State	Country	Region Name
1	POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	United States	US
2	POST-00001	130003832896	Postal Code	00001	Unknown	CA	United States	US
3	POST-00396	130011834511	Postal Code	00396	San Juan	PR	United States	US
4	POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	United States	US
5	POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US
6	POST-00501	130000573481	Postal Code	00501	Holtsville	NY	United States	US
7	POST-00544	130000573483	Postal Code	00544	Holtsville	NY	United States	US
8	POST-00600	130000705670	Postal Code	00600	Long Island City	NY	United States	US

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

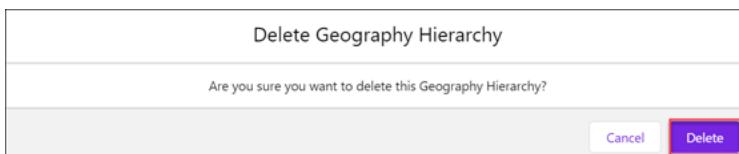
- From the **Details** tab, scroll to the **Geography Parents** section, click the drop-down for the hierarchy you want to delete, then select **Delete**.



The screenshot shows a table titled "Geography Parents" with columns: Geography Name, Geography Int..., Geography Type, Effective D..., End Date, Created By, Last Modified By, and End Date. There is 1 Record listed. The "Delete" button in the header is highlighted with a red box.

Geography Parents							
Geography Name	Geography Int...	Geography Type	Effective D...	End Date	Created By	Last Modified By	End Date
1 POST-10553	120001817514	Postal Code	8/30/2021		Amit Choudhury, 8/30/2021, 8:12	Amit Choudhury, 8/30/2021, 8:12	
1 Records							
View All							

- 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](#)

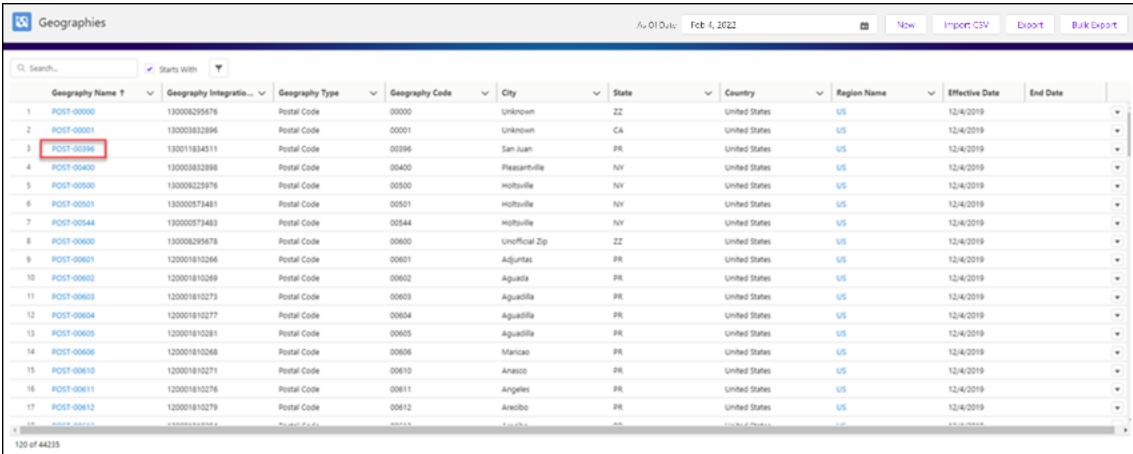
Add a Child Hierarchy to a Geography

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](#).



Geography Name	Geography Integration ID	Geography Type	Geography Code	City	State	Country	Region Name	Effective Date	End Date
1 POST-00000	130008295976	Postal Code	00000	Unknown	ZZ	United States	US	12/4/2019	
2 POST-00001	130008382896	Postal Code	00001	Unknown	CA	United States	US	12/4/2019	
3 POST-00196	130011834511	Postal Code	00396	San Juan	PR	United States	US	12/4/2019	
4 POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	United States	US	12/4/2019	
5 POST-00500	130009223976	Postal Code	00500	Holtsville	NY	United States	US	12/4/2019	
6 POST-00501	1300050573481	Postal Code	00501	Holtsville	NY	United States	US	12/4/2019	
7 POST-00544	1300050573483	Postal Code	00544	Holtsville	NY	United States	US	12/4/2019	
8 POST-00600	130008295978	Postal Code	00600	Unofficial Zip	ZZ	United States	US	12/4/2019	
9 POST-00601	120001810266	Postal Code	00601	Adjuntas	PR	United States	US	12/4/2019	
10 POST-00602	120001810269	Postal Code	00602	Aguadilla	PR	United States	US	12/4/2019	
11 POST-00603	120001810273	Postal Code	00603	Aguadilla	PR	United States	US	12/4/2019	
12 POST-00604	120001810277	Postal Code	00604	Aguadilla	PR	United States	US	12/4/2019	
13 POST-00605	120001810281	Postal Code	00605	Aguadilla	PR	United States	US	12/4/2019	
14 POST-00606	120001810268	Postal Code	00606	Maricao	PR	United States	US	12/4/2019	
15 POST-00610	120001810271	Postal Code	00610	Anasco	PR	United States	US	12/4/2019	
16 POST-00611	120001810276	Postal Code	00611	Angelus	PR	United States	US	12/4/2019	
17 POST-00612	120001810279	Postal Code	00612	Arroyo	PR	United States	US	12/4/2019	

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

Geography Children							New
	Geography Name	Geography Inte...	Geography Type	Effective D...	End Date	Created By	Last Modified...
1	POST-00157	9600500000029191	Postal Code	11/13/2020		Aditi Kapoor, 11/11	Aditi Kapoor, 11/11
1 Records							
View All							

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

New Geography Hierarchy

Information

* Child Geography Name <input type="text" value="Search Geographies..."/>	Parent Geography Name POST-01001
* Effective Date <input type="text"/>	End Date <input type="text"/>
Geography Hierarchy Integration Id T716EICZ27VJ4APIOP	

External Ids

External ID1 <input type="text"/>

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](#).

Geographies											As Of Date	Feb 1, 2023				
	Geography Name	Geography Integration ID	Geography Type	Geography Code	City	State	Country	Region Name	Effective Date	End Date						
1	POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	United States	US	12/4/2019							
2	POST-00001	130008312896	Postal Code	00001	Unknown	CA	United States	US	12/4/2019							
3	POST-00006	130011834511	Postal Code	00396	San Juan	PR	United States	US	12/4/2019							
4	POST-00040	130008302998	Postal Code	00400	Pleasantville	NY	United States	US	12/4/2019							
5	POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US	12/4/2019							
6	POST-00501	130009573481	Postal Code	00501	Holtsville	NY	United States	US	12/4/2019							
7	POST-00544	130009574483	Postal Code	00544	Holtsville	NY	United States	US	12/4/2019							
8	POST-00600	130008295678	Postal Code	00600	Unofficial Zip	ZZ	United States	US	12/4/2019							
9	POST-00601	120001810266	Postal Code	00601	Ajuntas	PR	United States	US	12/4/2019							
10	POST-00602	120001810269	Postal Code	00602	Aguada	PR	United States	US	12/4/2019							
11	POST-00603	120001810273	Postal Code	00603	Aguadilla	PR	United States	US	12/4/2019							
12	POST-00604	120001810277	Postal Code	00604	Aguadilla	PR	United States	US	12/4/2019							
13	POST-00605	120001810281	Postal Code	00605	Aguadilla	PR	United States	US	12/4/2019							
14	POST-00606	120001810268	Postal Code	00606	Barceloneta	PR	United States	US	12/4/2019							
15	POST-00610	120001810271	Postal Code	00610	Anasco	PR	United States	US	12/4/2019							
16	POST-00611	120001810276	Postal Code	00611	Angelus	PR	United States	US	12/4/2019							
17	POST-00612	120001810279	Postal Code	00612	Arecibo	PR	United States	US	12/4/2019							
X 1000 Rows Selected																

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

Geography Children										
Geography Name	Geography Integration ID	Geography Type	Effective Date	End Date	Created By	Last Modified By	End Date			
1 POST-10466	120001817400	Postal Code	8/27/2021	10/31/2021	Amit Choudhury, 8/27/2021, 10:5	Amit Choudhury, 8/27/2021, 10:5				
1 Records										
View All										

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

Edit Geography Hierarchy

Information	
* Child Geography Name POST-00157	Parent Geography Name POST-01001
* Effective Date Nov 13, 2020	End Date
Geography Hierarchy Integration Id E2I1WOIC27VHRBX2EH	
External Ids	
External ID1	
Audit Information	
Created By Aditi Kapoor, 11/16/2020, 11:19 AM	Last Modified By Aditi Kapoor, 11/16/2020, 11:19 AM
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="border: 2px solid red;" type="button" value="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](#).

Geography Name	Geography Integration Id	Type	Code	City	State	Country	Region Name	Effective Date	End Date
POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	United States	US	12/4/2019	
POST-00001	130008322896	Postal Code	00001	Unknown	CA	United States	US	12/4/2019	
3 POST-00006	13001834311	Postal Code	00396	San Juan	PR	United States	US	12/4/2019	
4 POST-00400	130008322898	Postal Code	00400	Pleasantville	NY	United States	US	12/4/2019	
5 POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US	12/4/2019	
6 POST-00501	13000573481	Postal Code	00501	Holtsville	NY	United States	US	12/4/2019	
7 POST-00544	13000574483	Postal Code	00544	Holtsville	NY	United States	US	12/4/2019	
8 POST-00600	130008295678	Postal Code	00600	Unofficial Zip	ZZ	United States	US	12/4/2019	
9 POST-00601	12000181266	Postal Code	00601	Ajuntas	PR	United States	US	12/4/2019	
10 POST-00602	12000181269	Postal Code	00602	Aguada	PR	United States	US	12/4/2019	
11 POST-00603	120001810273	Postal Code	00603	Aguadilla	PR	United States	US	12/4/2019	
12 POST-00604	120001810277	Postal Code	00604	Aguadilla	PR	United States	US	12/4/2019	
13 POST-00605	120001810281	Postal Code	00605	Aguadilla	PR	United States	US	12/4/2019	
14 POST-00606	120001810268	Postal Code	00606	Barceloneta	PR	United States	US	12/4/2019	
15 POST-00610	120001810271	Postal Code	00610	Anasco	PR	United States	US	12/4/2019	
16 POST-00611	120001810276	Postal Code	00611	Angelus	PR	United States	US	12/4/2019	
17 POST-00612	120001810279	Postal Code	00612	Arecibo	PR	United States	US	12/4/2019	
18 POST-00615	120001810280	Postal Code	00615	Bayamon	PR	United States	US	12/4/2019	

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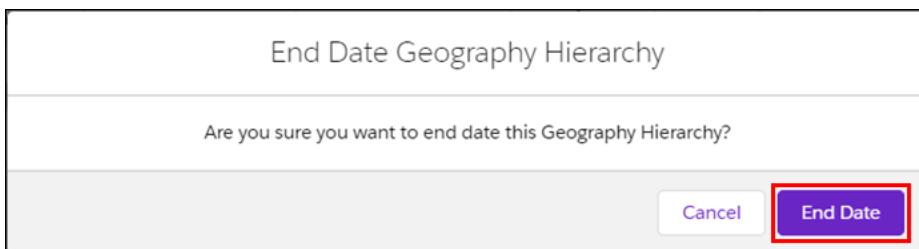
3. Scroll to the **Geography Children** section, click the drop-down for the hierarchy you want to remove, and then select **End Date**.

Geography Children					
Geography Integration Id	Geography Type	Effective Date	End Date	Created By	Last Modified
9600500000029191	Postal Code	11/13/2020		Aditi Kapoor, 11/16/20	Aditi Kapoor, 11/16/20

1 Records

[View All](#)

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



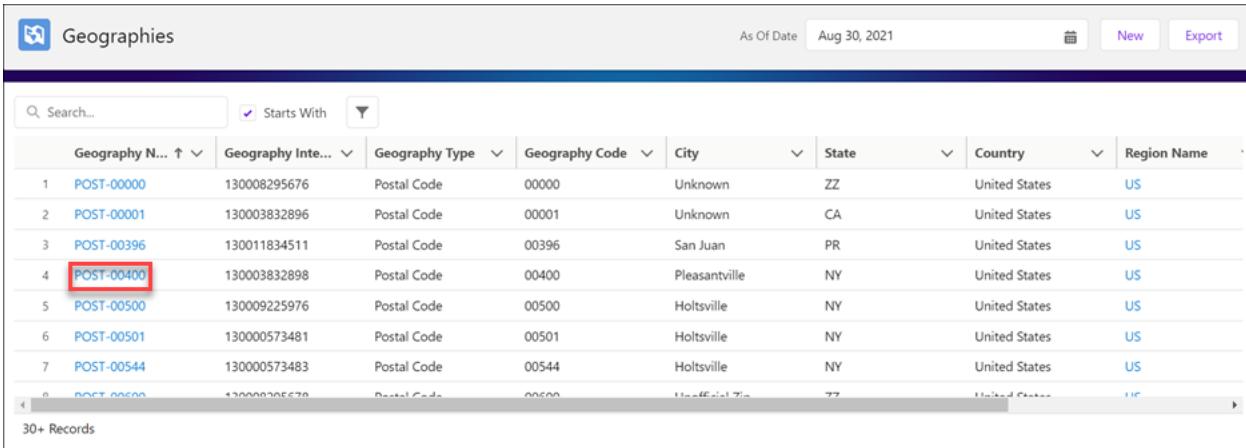
Delete a Child Hierarchy Linked to a Geography

You can delete child hierarchies linked to a geography.

To delete a child hierarchy linked to a geography

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

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

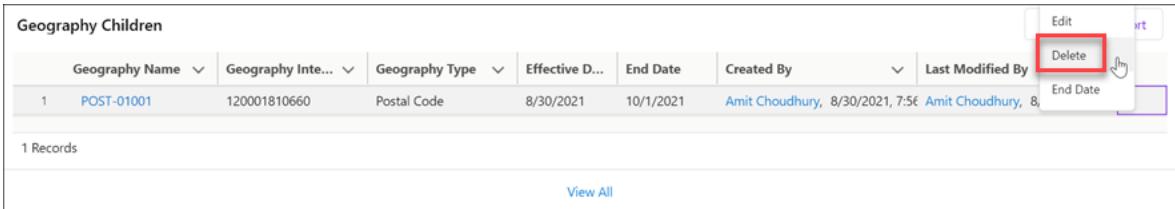


The screenshot shows a table titled "Geographies" with columns: Geography Name, Geography Int..., Geography Type, Geography Code, City, State, Country, and Region Name. There are 30+ Records listed. The row for "POST-00400" is highlighted with a red box around its "Geography Name" cell.

	Geography N...	Geography Int...	Geography Type	Geography Code	City	State	Country	Region Name
1	POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	United States	US
2	POST-00001	130003832896	Postal Code	00001	Unknown	CA	United States	US
3	POST-00396	130011834511	Postal Code	00396	San Juan	PR	United States	US
4	POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	United States	US
5	POST-00500	130009225976	Postal Code	00500	Holtsville	NY	United States	US
6	POST-00501	130000573481	Postal Code	00501	Holtsville	NY	United States	US
7	POST-00544	130000573483	Postal Code	00544	Holtsville	NY	United States	US
8	POST-00600	130000705670	Postal Code	00600	Long Island City	NY	United States	US

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

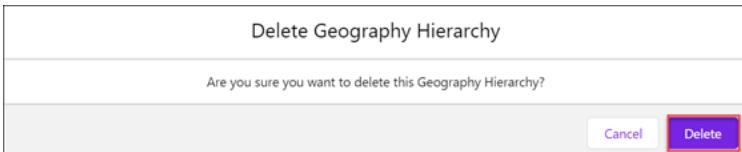
- From the **Details** tab, scroll to the **Geography Children** section, click the drop-down for the hierarchy you want to delete, then select **Delete**.



The screenshot shows a table titled "Geography Children" with columns: Geography Name, Geography Int..., Geography Type, Effective D..., End Date, Created By, Last Modified By, and Edit/Delete. There is 1 Record listed. The "Delete" button in the header is highlighted with a red box.

Geography Name	Geography Int...	Geography Type	Effective D...	End Date	Created By	Last Modified By	Edit	Delete
1 POST-01001	120001810660	Postal Code	8/30/2021	10/1/2021	Amit Choudhury, 8/30/2021, 7:56	Amit Choudhury, 8/30/2021, 7:56		

- Click **Delete** to confirm.



The screenshot shows a confirmation dialog with the title "Delete Geography Hierarchy". It asks "Are you sure you want to delete this Geography Hierarchy?". At the bottom are "Cancel" and "Delete" buttons, with "Delete" highlighted by a red box.

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](#).

Regions						
		As Of Date Nov 16, 2020			Actions	
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With <input type="button"/>				
Region Name ↑	Region Integration Id	Country	Effective Date	End Date		
1 Canada	10002000000117	Canada	1/1/2020			
2 North America	10002000000127		1/1/2020			
3 US	10002000000107	United States	1/1/2020			

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	Dec 8, 2020	<input type="button"/>
------------	-------------	------------------------

- **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 US	As Of Date Nov 16, 2020	<input type="button"/>	Edit	Delete	End Date
Region Integration Id 10002000000107	Effective Date 1/1/2020	End Date			

- **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.

Region Integration Id: 100020000000107
Effective Date: 1/5/2019
End Date:
Region Name: US
Description: United States
Suppress Publish:
Region Integration Id: 100020000000107
End Date:
Country: United States
Region Parents: 0 of 0
Region Children: 0 of 0

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: US
Region Integration Id: 100020000000107
Effective Date: 1/5/2019
End Date:
Description: United States
Suppress Publish:

- **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 IDs	
External ID1	External ID2
External ID3	External ID4
External ID5	

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

Audit Information

Audit Information	
Created By System, 11/6/2020, 12:08 PM	Last Modified By System, 11/6/2020, 12:08 PM

- **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 Parents						New
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						

- **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 Children						New
	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
View All						
1 Records						

- **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

Details	Company Holidays	Details History-Time	Hierarchy
Company Holidays			
Date ↑	Company Holiday Name		
1 11/11/2021	Veteran's Day		
2 11/25/2021	Thanksgiving		
3 12/25/2021	Christmas		
3 of 3			
View All			

- **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

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.

Region Parents

Region Parents							New
	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	

For details on the fields in this section, see the **Region Parents** section in [Region Details Tab](#).

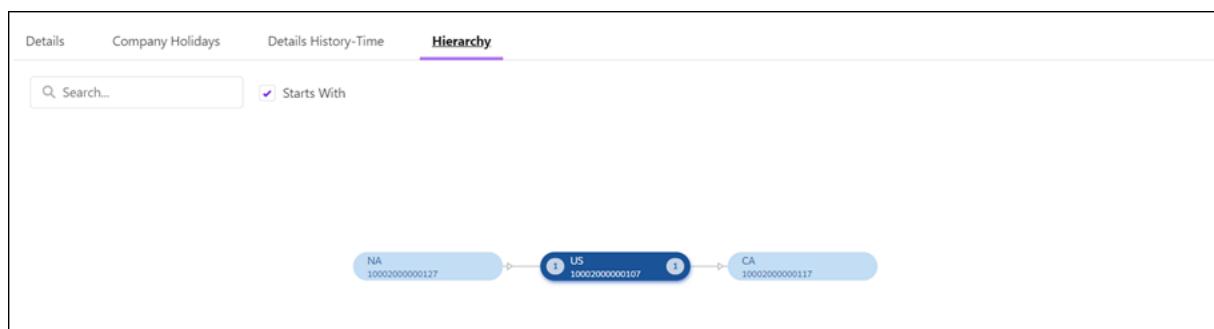
Region Children

Region Children							New
	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	

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**.

The screenshot shows a table with columns: Region Name, Region Integration Id, Country, Effective Date, and End Date. There are three rows: 1. Canada, 10002000000117, Canada, 1/1/2020, 1/1/2020; 2. North America, 10002000000127, (empty), 1/1/2020, 1/1/2020; 3. US, 10002000000107, United States, 1/1/2020, 1/1/2020. A red box highlights the 'New' button in the top right corner of the header.

Region Name ↑	Region Integration Id	Country	Effective Date	End Date
1 Canada	10002000000117	Canada	1/1/2020	1/1/2020
2 North America	10002000000127		1/1/2020	1/1/2020
3 US	10002000000107	United States	1/1/2020	1/1/2020

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

New Region

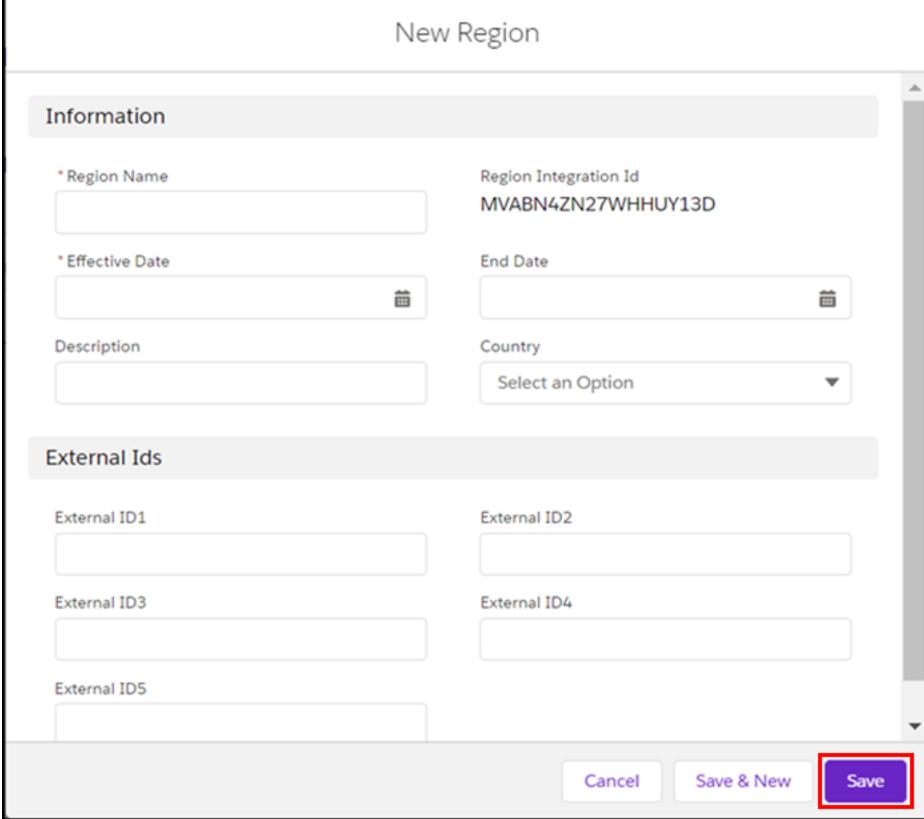
Information

* Region Name	Region Integration Id MVABN4ZN27WHUY13D
* Effective Date	End Date
Description	Country Select an Option

External Ids

External ID1	External ID2
External ID3	External ID4
External ID5	

Cancel Save & New **Save**



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

Modify a Region

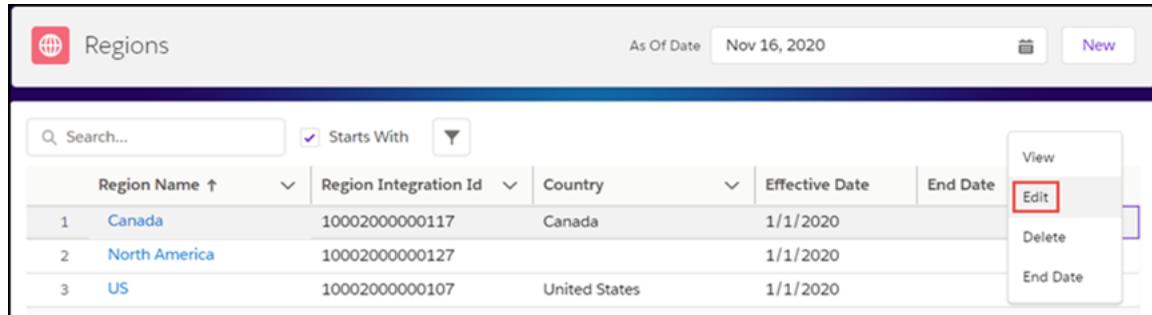
You can make updates to the information of an existing Region.

To edit a Region

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

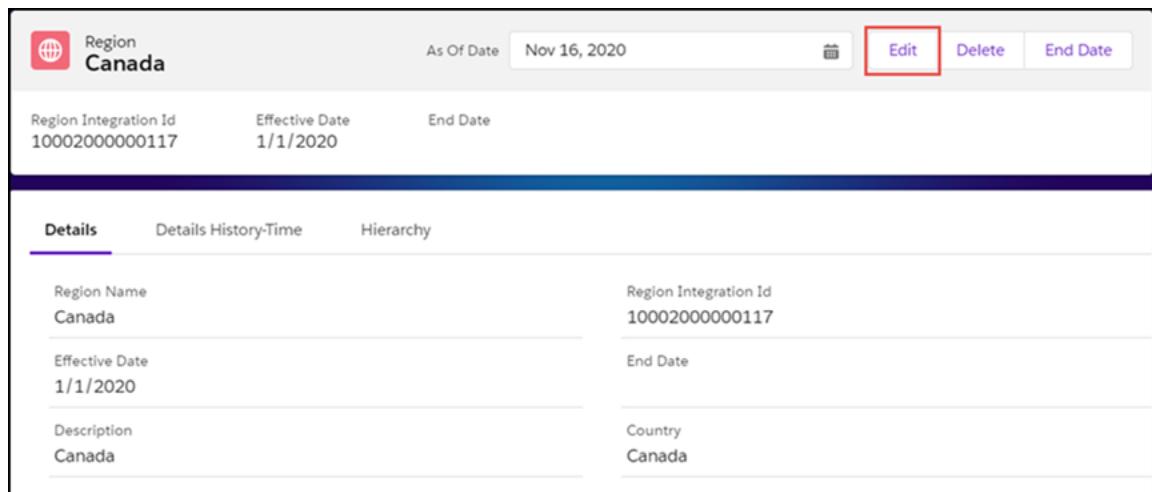
Note: Use the **Search**  and **Filters**  functions to help you locate the region. See [Search and Filter Functions](#).

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



Regions					
As Of Date Nov 16, 2020					
<input type="text" value="Search..."/> <input checked="" type="checkbox"/> Starts With <input type="button" value="▼"/>					
Region Name ↑	Region Integration Id	Country	Effective Date	End Date	
1 Canada	10002000000117	Canada	1/1/2020		<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="End Date"/>
2 North America	10002000000127		1/1/2020		
3 US	10002000000107	United States	1/1/2020		

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



Region Canada		
Region Integration Id 10002000000117	Effective Date 1/1/2020	End Date
<hr/>		
Details	Details History-Time	Hierarchy
Region Name Canada	Region Integration Id 10002000000117	
Effective Date 1/1/2020		End Date
Description Canada	Country Canada	

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

Edit Canada

Information

* Region Name Canada	Region Integration Id 10002000000117
* Effective Date Jan 1, 2020	End Date
Description Canada	Country Canada

External Ids

External ID1 CA	External ID2
External ID3	External ID4
External ID5	

Buttons: Cancel, Save & New, **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**.

Region Name	Region Integration Id	Country	Effective Date	End Date
1 Canada	100020000000117	Canada	1/1/2020	
2 North America	100020000000127		1/1/2020	
3 US	100020000000107	United States	1/1/2020	

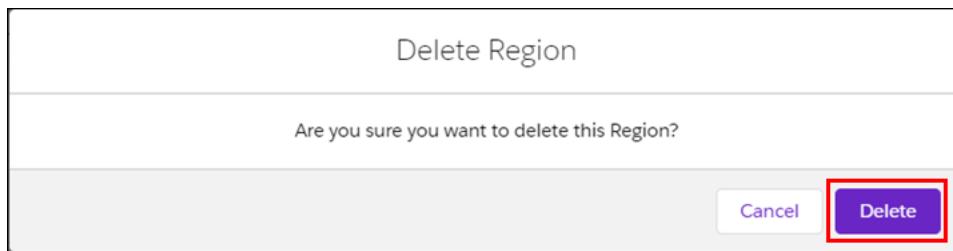
- Click the region name to go to the Region Details page, and then click **Delete**.

Region Integration Id	Effective Date	End Date
100020000000117	1/1/2020	

Details Details History-Time Hierarchy

Region Name Canada	Region Integration Id 100020000000117
Effective Date 1/1/2020	End Date
Description Canada	Country Canada

- 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.

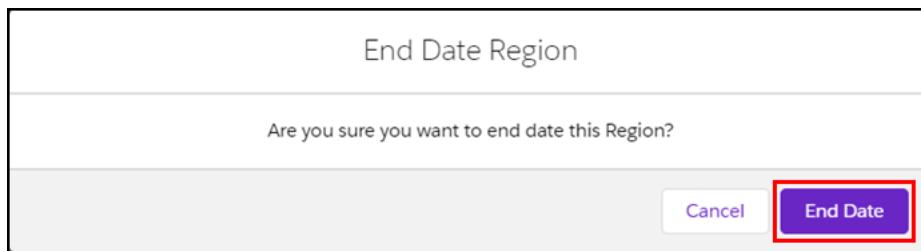
To end date a region

- Click **Regions** from the primary navigation bar.
- 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](#).

Region Name	Region Integration Id	Country	Effective Date	End Date
1 Canada	10002000000117	Canada	1/1/2020	
2 North America	10002000000127		1/1/2020	
3 US	10002000000107	United States	1/1/2020	

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](#)

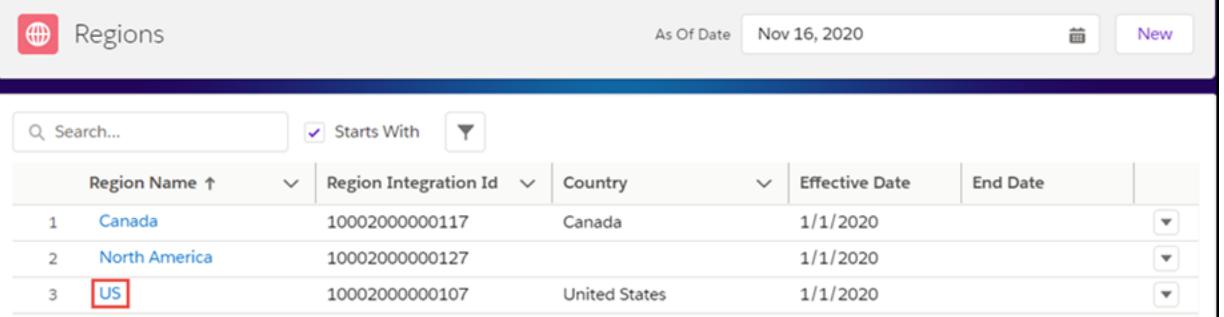
Add a Parent Hierarchy to a Region

You can add parent hierarchies to a region.

To add a parent hierarchy to a region

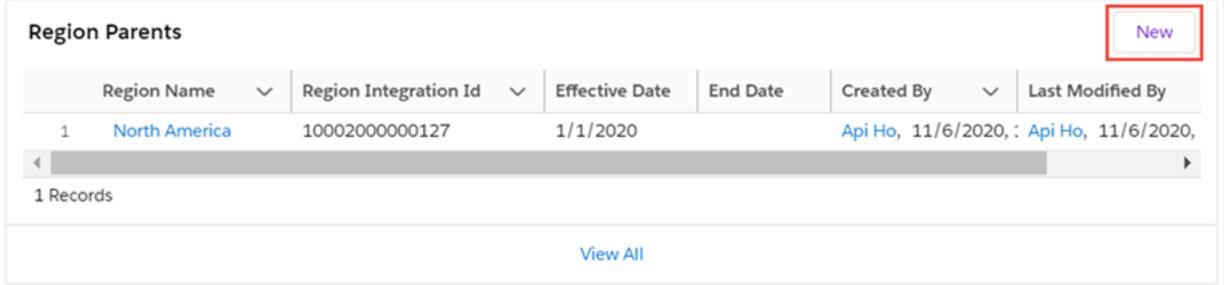
1. Click **Regions** from the primary navigation bar.
2. Select the region you want to add a parent hierarchy to.

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



Region Name	Region Integration Id	Country	Effective Date	End Date
1 Canada	10002000000117	Canada	1/1/2020	
2 North America	10002000000127		1/1/2020	
3 US	10002000000107	United States	1/1/2020	

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



Region Name	Region Integration Id	Effective Date	Created By	Last Modified By
1 North America	10002000000127	1/1/2020	Api Ho, 11/6/2020, :	Api Ho, 11/6/2020,

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

New Region Hierarchy

Information

* Parent Region	Child Region
Search Regions... <input type="text"/>	US
* Effective Date <input type="text"/>	End Date <input type="text"/>
Region Hierarchy Integration Id TM7FJ6S927WPFNBRDL	

External Ids

External ID1 <input type="text"/>

[Cancel](#) [Save & New](#) **[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](#).

Regions As Of Date Nov 16, 2020 [New](#)

	Region Name ↑	Region Integration Id	Country	Effective Date	End Date
1	Canada	10002000000117	Canada	1/1/2020	
2	North America	10002000000127		1/1/2020	
3	US	10002000000107	United States	1/1/2020	

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

The screenshot shows a table titled "Region Parents". A single row is visible with the following data:

- Region Integration Id: 10002000000127
- Effective Date: 1/1/2020
- Created By: Api Ho, 11/6/2020, 12:07 PM
- Last Modified By: Api Ho, 11/6/2020, 12:07 PM

A context menu is open over the last modified date, with the "Edit" option highlighted by a red box. Other options in the menu include "New" and "End Date".

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

The screenshot shows the "Edit Region Hierarchy" dialog box with the following fields:

- Information** tab:
 - * Parent Region: North America
 - Child Region: US
 - * Effective Date: Jan 1, 2020
 - End Date: (empty)
 - Region Hierarchy Integration Id: 10004000
- External IDs** tab:
 - External ID1: US
- Audit Information** tab:
 - Created By: Api Ho, 11/6/2020, 12:07 PM
 - Last Modified By: Api Ho, 11/6/2020, 12:07 PM

At the bottom right of the dialog, there are three buttons: "Cancel", "Save & New", and "Save", with the "Save" button highlighted by a red box.

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

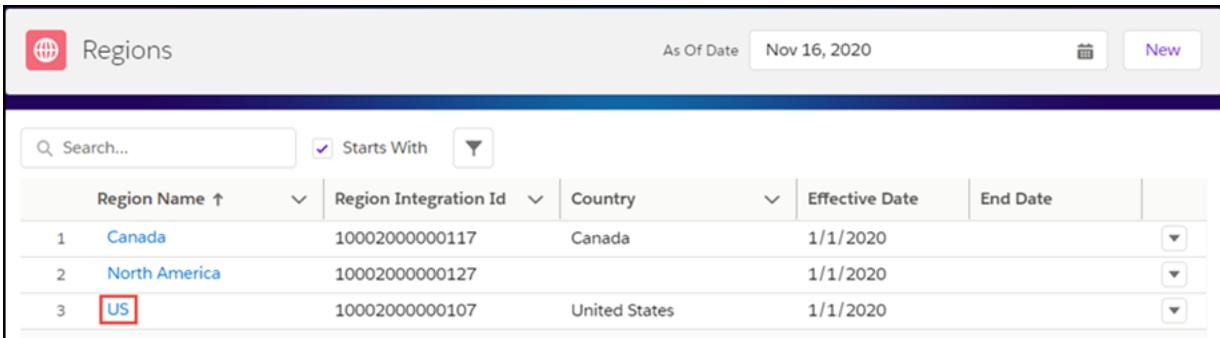
End Date a Parent Hierarchy Linked to a Region

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

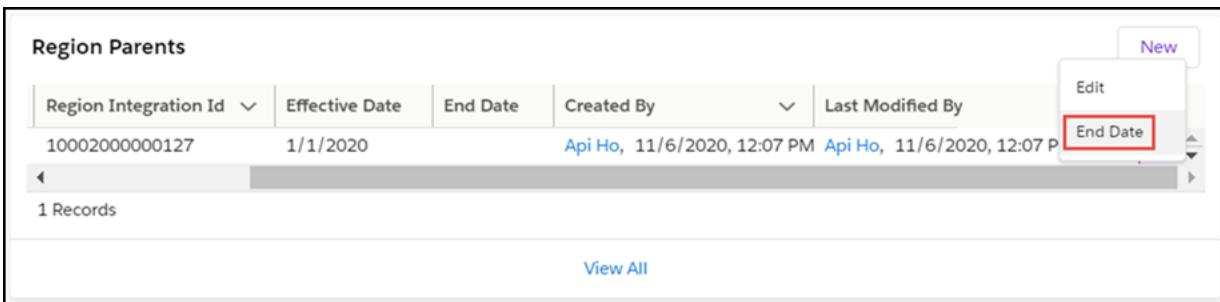
1. Click **Region** from the primary navigation bar.
2. Select the region that has the parent hierarchy you want to end date.

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



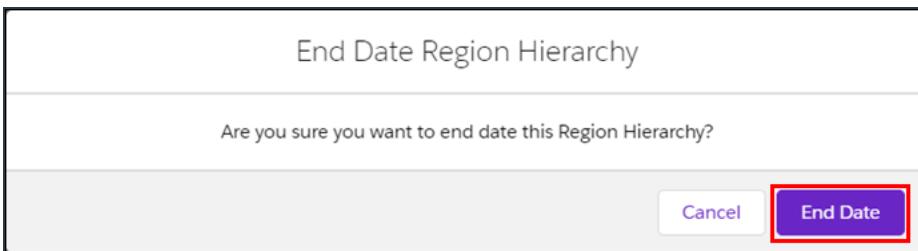
	Region Name	Region Integration Id	Country	Effective Date	End Date
1	Canada	10002000000117	Canada	1/1/2020	
2	North America	10002000000127		1/1/2020	
3	US	10002000000107	United States	1/1/2020	

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



Region Parents					
Region Integration Id	Effective Date	End Date	Created By	Last Modified By	
10002000000127	1/1/2020	Api Ho, 11/6/2020, 12:07 PM	Api Ho, 11/6/2020, 12:07 P		
1 Records					
View All					

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



End Date Region Hierarchy

Are you sure you want to end date this Region Hierarchy?

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](#)

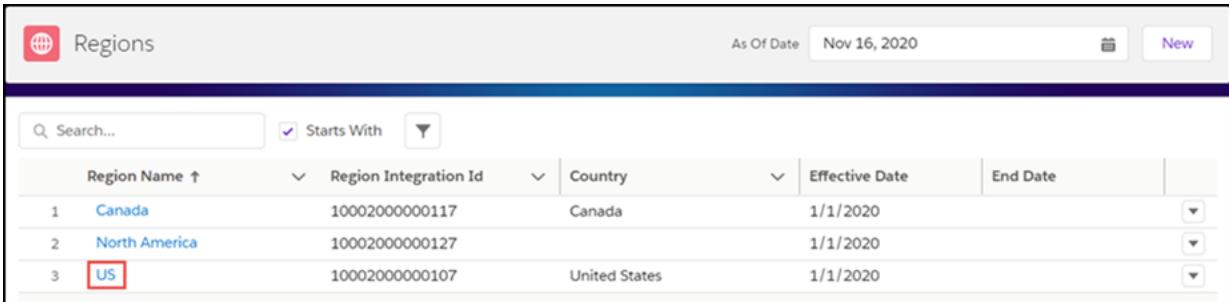
Add a Child Hierarchy to a Region

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](#).



Region Name	Region Integration Id	Country	Effective Date	End Date
1 Canada	10002000000117	Canada	1/1/2020	
2 North America	10002000000127		1/1/2020	
3 US	10002000000107	United States	1/1/2020	

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

Region Children						
Region Name	Region Integration Id	Effective Date	End Date	Created By	Last Modified By	New
1 Canada	10002000000117	11/13/2020		Aditi Kapoor, 11/17/20	Aditi Kapoor, 11/17/20	
1 Records						
View All						

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

New Region Hierarchy

Information	
* Child Region <input type="text" value="Search Regions..."/>	Parent Region US
* Effective Date <input type="text"/>	End Date <input type="text"/>
Region Hierarchy Integration Id I5CN58KQ2843R6Z2VD	
External Ids	
External ID1 <input type="text"/>	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="border: 2px solid red; background-color: #e67e22; color: white;" type="button" value="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](#).

Region Name	Region Integration Id	Country	Effective Date	End Date
1 Canada	10002000000117	Canada	1/1/2020	
2 North America	10002000000127		1/1/2020	
3 US	10002000000107	United States	1/1/2020	

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

Region Integration Id	Effective Date	End Date	Created By	Last Modified By
10002000000117	11/13/2020		Aditi Kapoor, 11/17/2020, 5:51	Aditi Kapoor, 11/17/2020, 5:51

1 Records

[View All](#)

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

Edit Region Hierarchy

Information

* Child Region  Canada <input type="button" value="X"/>	Parent Region US
* Effective Date Nov 13, 2020 <input type="button" value="Calendar"/>	End Date <input type="button" value="Calendar"/>
Region Hierarchy Integration Id AVEY50UK2841HIE3I1	

External Ids

External ID1 <input type="text"/>

Audit Information

Created By Aditi Kapoor, 11/17/2020, 5:56 AM	Last Modified By Aditi Kapoor, 11/17/2020, 5:56 AM
-------------------------------------------------	-------------------------------------------------------

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](#).

Region Name ↑		Region Integration Id	Country	Effective Date	End Date
1	Canada	10002000000117	Canada	1/1/2020	
2	North America	10002000000127		1/1/2020	
3	US	10002000000107	United States	1/1/2020	

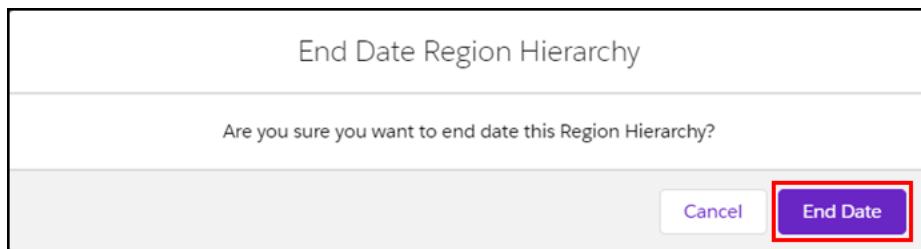
3. Scroll to the **Region Children** section, click the drop-down for the hierarchy you want to remove, and then select **End Date**.

Region Children				
Region Integration Id	Effective Date	End Date	Created By	Last Modified By
10002000000117	11/13/2020		Aditi Kapoor, 11/17/2020, 5:51	Aditi Kapoor, 11/17/2020, 5:51

1 Records

[View All](#)

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.

	Region Name	Region Integration Id	Country	Effective Date	End Date
1	Canada	10002000000117	Canada	1/1/2020	
2	North America	10002000000127		1/1/2020	
3	US	10002000000107	United States	1/1/2020	

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

Details	Company Holidays	Details History-Time	Hierarchy
Company Holidays			
	Date ↑	Company Holiday Name	New Copy Export
1	11/11/2021	Veteran's Day	
2	11/25/2021	Thanksgiving	
3	12/25/2021	Christmas	
3 of 3			
View All			

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

New Company Holiday

Information	
* Company Holiday Name <input type="text"/>	Region Name US
* Date <input type="text"/>	Company Holiday Integration Id P7JGELC154V1XORBY1
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="background-color: #0070C0; color: white; border: 1px solid #0070C0;" type="button" value="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.

Regions						As Of Date	Oct 25, 2021	New	Export	
Search...		Starts With	Region Name	Region Integration Id	Country	Effective Date	End Date			
1	Eastern Mexico		Eastern Mexico	7B1ZT50054U0SW1C9	Mexico	10/25/2021				
2	US		US	10002000000107	United States	1/5/2019				

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

Region Eastern Mexico			As Of Date	Oct 25, 2021	New	Edit	Delete	End Date
Details	Company Holidays	Details History-Time	Hierarchy					
Region Integration Id 7B1ZT50054U0SW1C9	Effective Date 10/25/2021	End Date						
Company Holidays				New	Copy	Export		

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

Add Company Holiday to Region

Region		Company Holidays		
Select the region from which company holidays to be copied:				
Region Name ↑	Region Integration Id	Country	Effective Date	End Date
<input type="radio"/> Eastern Mexico	TBYZT50G54UGSW1C9	Mexico	10/25/2021	
<input checked="" type="radio"/> US	10000000000107	United States	1/5/2019	

2 of 2 (1 selected)

[Cancel](#) [Next](#)

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

Add Company Holiday to Region

Region		Company Holidays	
Select the company holidays to copy:			
Search...	Starts With	Company Holiday Name	
<input checked="" type="checkbox"/> Date ↑		Veteran's Day	
<input checked="" type="checkbox"/> 11/11/2021		Thanksgiving	
<input checked="" type="checkbox"/> 11/25/2021		Christmas	
<input checked="" type="checkbox"/> 12/25/2021			

[Previous](#) [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](#).

Sales Forces						As Of Date	Feb 4, 2022	Export	Bulk Export
Sales Force Name  Starts With 		Sales Force Integration Id	Sales Force Type	Region Name	Effective Date				
1	Diabetes and Oncology	1000000008200	Retail	US	1/1/2020				
2	Diabetes Sales	10000000087424	Retail	US	1/1/2020				
3	Oncology Sales	10000000087264	Institutional	US	1/1/2020				

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.

As Of Date	Dec 8, 2020	
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Highlight Section

Sales Force Diabetes Sales		As Of Date Nov 17, 2020	
Sales Force Integration Id 10000000087424	Sales Force Type Retail	Effective Date 1/1/2020	End Date

- **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 Force New Primary Care SF		As Of Date Aug 27, 2021	
Sales Force Integration Id BLJ94VB947V6L46ZJD	Sales Force Type Retail	Effective Date 6/1/2021	End Date
<hr/>			
Details	Account Alignment Rules	Details History-Time	Account Alignment Rules History-Ti...
Sales Force Name New Primary Care SF			Sales Force Integration Id BLJ94VB947V6L46ZJD
Effective Date 6/1/2021			End Date
Sales Force Type Retail			Sales Force Description
Region US			Account Territory Limited To Region

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

The screenshot shows the 'Sales Force' configuration page. At the top, it displays the Sales Force Name: 'New Primary Care SF'. Below this, there are four columns: Sales Force Integration Id (BLJ94VB947V6L46ZJD), Sales Force Type (Retail), Effective Date (6/1/2021), and End Date. A toolbar at the top right includes 'As Of Date' set to 'Aug 27, 2021' and a refresh icon. The main area is titled 'Details' and contains sections for Sales Force Name, Effective Date, Sales Force Type, Region, Sales Force Integration Id, End Date, Sales Force Description, and Account Territory Limited To Region (with a checked checkbox).

- **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

The screenshot shows the 'External IDs' section. It features five input fields labeled 'External ID1', 'External ID2', 'External ID3', 'External ID4', and 'External ID5' arranged vertically.

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

Audit Information

Audit Information	
Created By System, 11/6/2020, 12:08 PM	Last Modified By System, 11/6/2020, 12:08 PM

- **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 Alignments								Hierarchy	Export
	Product Name	Product Integration Id	Product Type	Product Alignment Type	Source	Effective Date	End Date		
1	ProductB	JAJGT33W5K42YB0FT	Detail	Detail	Explicit	12/7/2021	12/27/2021		
2	ProductA	7G6VB9PF5K42F094S9	Brand	Detail	Explicit	12/7/2021	12/31/2021		
2 of 2									
View All									

- **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 Alignments Explicit								Hierarchy	Export
	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									

- **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

Territories							Export
	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							

- **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

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, 8/12/2020	Document Global Ho, 8/12/2020	
1 Records						
View All						

- **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, 8/7/2020	Document Global Ho, 8/7/2020	
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							Hierarchy	Export
Product Name	Product Integration Id	Product Type	Product Alignment Type	Source	Effective Date	End Date		
1 ProductB	JAJGT33W5K42YBDFT	Detail	Detail	Explicit	12/7/2021	12/27/2021		
2 ProductA	706VB9PF5K42F094S9	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							Hierarchy	Export
Product Name	Product Integration Id	Product Type	Product Alignment T...	Effective Date	End Date	Created By		Last Modified By
1 ProductA	706VB9PF5K42F094S9	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	JAJGT33W5K42YBDFT	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							Export
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						
	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, 8/12/2020	Document Global Ho, 8/12/2020
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](#).

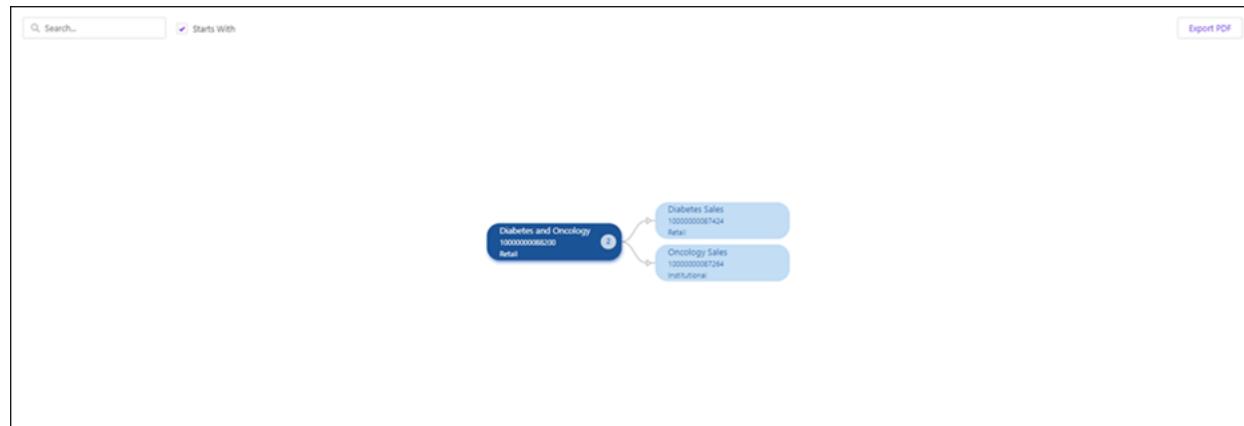
Account Exclusions

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, 8/7/20	Document Global Ho, 8/7/20	
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](#).

The screenshot shows a table with columns: Product Name, Product Integration Id, Effective Date, End Date, and Is Pending. The data includes various products like Alomide, Alora, Alosetron Hydrochloride, ALSUMA, etc., with their respective integration IDs and dates.

	Product Name	Product Integration Id	Effective Date	End Date	Is Pending
1	Alomide	PROD17	8/1/2014		
2	Alora	PROD30	8/1/2014		
3	Alosetron Hydrochloride	PROD32	8/1/2014		
4	ALSUMA	PROD02	8/1/2014		
5	ALSUMA 100mg	PROD07	8/1/2014		
6	ALSUMA Oral	PROD37	8/1/2014		
7	ALSUMA Tablets	PROD08	8/1/2014		
8	AVINZA	PROD01	8/1/2014		
9	AVINZA Capsules	PROD10	1/1/2014		
10	AVINZA Chewables	PROD11	8/1/2014		
11	AVINZA Oral	PROD36	8/1/2014		
12	AVINZA Tablets	PROD09	8/1/2014	11/8/2022	✓
13	Baclofen	PROD18	8/1/2014		

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	Dec 8, 2020	
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- 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 Caronol	As Of Date	Feb 4, 2022		New	Edit	Delete	End Date
Product Integration Id 10193000063205	Product Type Detail	Effective Date 1/1/2020	End Date				

- **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 Caronol		As Of Date	Feb 4, 2022		New	Edit	Delete	End Date
Product Integration Id 10193000063205	Product Type Detail	Effective Date 1/1/2020	End Date					
Details								
Product Name Caronol	Alignments	Details History-Time	Alignments History-Time	Hierarchy				
Effective Date 1/1/2020			Product Integration Id 10193000063205	End Date				
Product Type Detail			Product Description Caronol					
Region US								

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

Details	Alignments	Details History-Time	Alignments History-Time	Hierarchy
Product Name Caronol			Product Integration Id 10193000063205	
Effective Date 1/1/2020			End Date	
Product Type Detail			Product Description Caronol	
Region United States				

- **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

Additional Details	
Competitor Product <input type="checkbox"/>	Is Co-Promote? <input type="checkbox"/>
Detail Type	Therapeutic Area
Therapeutic Class	Indication
Manufacturer	Launch Date
Form	Projection Group
Sign Status	Packaging
Currency USD - U.S. Dollar	DIN
Product Weight	Length
Quantity	Unit Of Measure

- **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

Samples	
Is Available For Allocation	<input type="checkbox"/>
Lot Numbers Required	<input type="checkbox"/>
Physical Sample Drop	<input type="checkbox"/>
Controlled Substance	<input type="checkbox"/>
SDL Category	
Max Inventory	
Max Order	
Sample Strength Form	
Is Required Signature	<input type="checkbox"/>
Default Quantity	
Sample Distributor	
Restricted States	
Threshold	
Min Inventory	
Min Order	

- **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

Consumer Health	
Is Kit	Store Check Group
<input type="checkbox"/>	
Inner Box	Outer Box
Sort Order	

- **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 IDs	
External ID1	External ID2
External ID3	External ID4
External ID5	

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

Audit Information

Audit Information	
Created By System, 11/6/2020, 12:08 PM	Last Modified By System, 11/6/2020, 12:08 PM

- **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	NPTTestRule3
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 Integrat...	Account Type	Specialty	Territory Name	Territory Integrat...	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
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	PSTOAPZU30JDAP4U...	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	7P3L0FGM30JDGGCR...	Sales	7/1/2021		System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM	
3 Neurology Primary Care	7P3L0FGM30JDGGCR...	Detail	7/1/2021		System, 10/20/2021, 3:09 AM	System, 10/20/2021, 3:09 AM	
4 Neurology Primary Care	7P3L0FGM30JDGGCR...	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 Integration ID	Territory Type	Product Alignment Type	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	
6	Neurology PC NH District	XP61SK504F6FAY4855	District	Detail		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 Integration ID	Territory Type	Product Alignment Type	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

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	

- **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 Product Restrictions							Export	
	Account Name	Account Integration Id	Account Type	Account Specialty	Source	Reason	Effective Date	End Date
1	Community Medical Clinic	WUJE00091052	Department	Other specialty	Explicit		10/26/2021	
1 of 1								

- **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 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						

- **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 Product Territory Restrictions Explicit									
Account Name ↑	Account Integration Id	Account Type	Territory Name	Territory Integration Id	Effective Date	End Date	Created By	Last Modified By	Export
1 Community Medical Clinic	WUSe00091052	Department	MSL Arizona	0XVV8DEZ3Q0LMST0OR	10/06/2021		System Admin, 10/27/2021, 10:46 AM	System Admin, 10/27/2021, 10:46 AM	
1 of 1									
View All									

- **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

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.

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				
4 of 4								

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	NPTTestRule3	
1 Records						

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 Integrat... ↓	Account Type ↓	Specialty ↓	Territory Name ↓	Territory Integrat... ↓
1	AMNA V MEHMOOD		Medical Professional	Physician assistant	Vaccine - Somerset cou	L1B2XVBS26C5GS6...

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
1	BERNARDINO GARCIA	0013h00000FmftWAAZ	Business Contact	Delaware - Diabetes Sales	100690000013295	12/2/2020

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						
	Sales Force Name ↓	Sales Force Integ... ↓	Product Alignme... ↓	Effective Date	End Date	Created By ↓
1	Neurology	PSTOAPZU3OJDAP4U...	Detail	6/1/2021	12/31/2022	System, 10/20/2021, 3:09 AM
2	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Sales	7/1/2021		System, 10/20/2021, 3:09 AM
3	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Detail	7/1/2021		System, 10/20/2021, 3:09 AM
4	Neurology Primary Care	7P3L0FGM3OJDGGCR...	Ratings	7/1/2021		System, 10/20/2021, 3:09 AM

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](#).

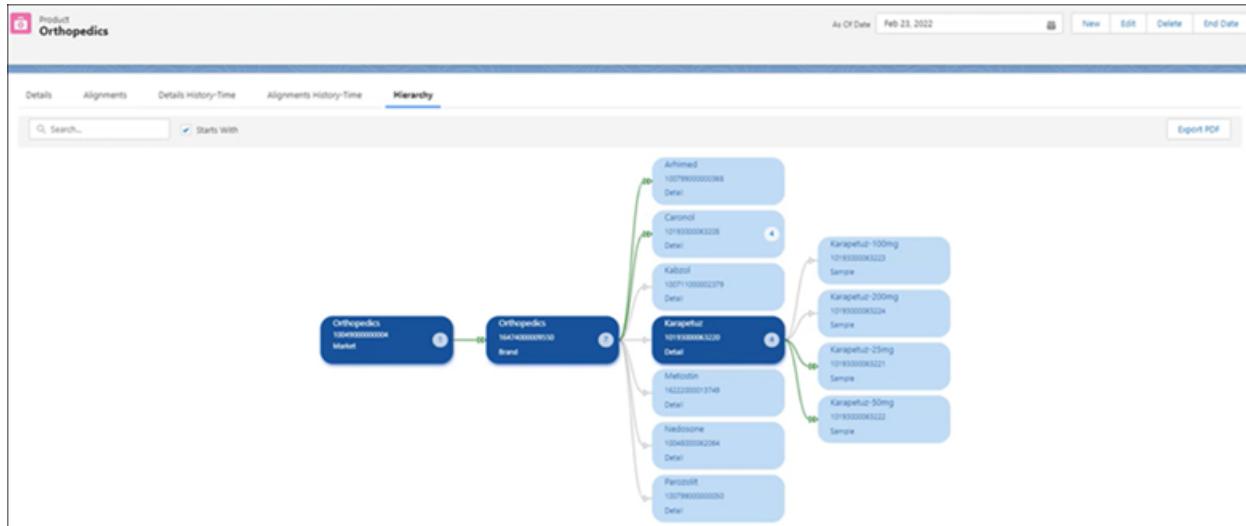
Product Alignments Exclusions

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:

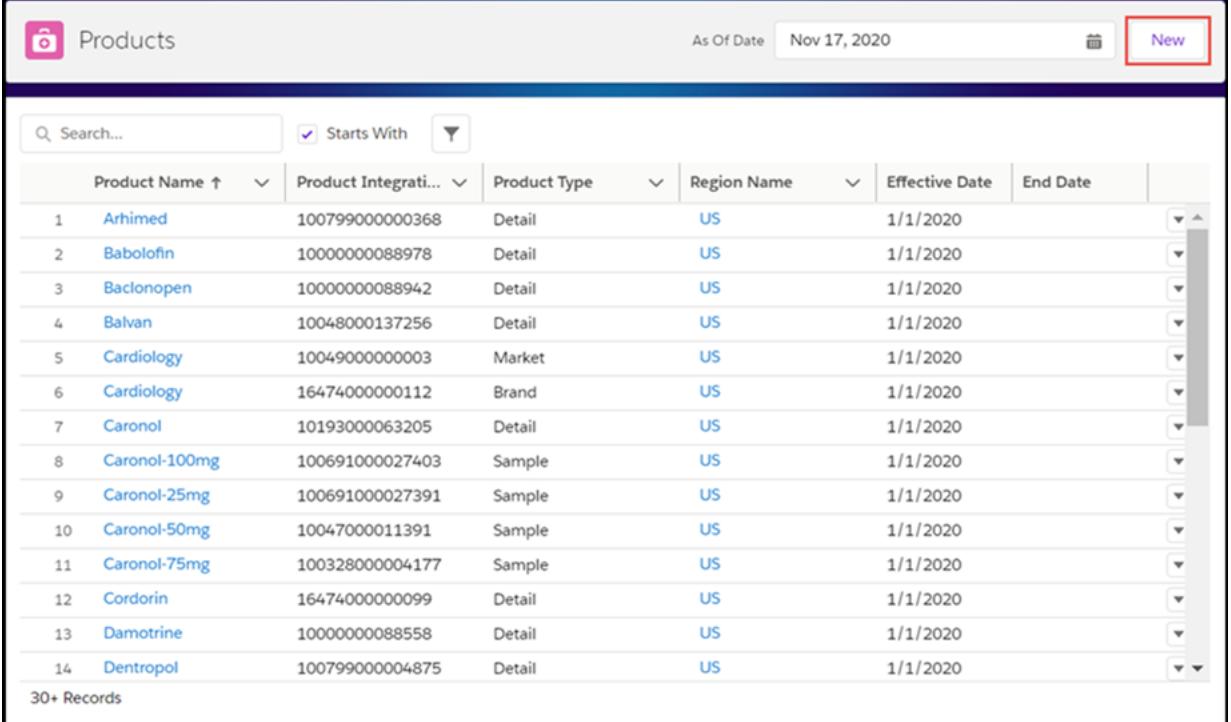
- [Add a Product](#)
- [Modify a Product](#)
- [Delete a Product](#)
- [End Date a Product](#)

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**.



The screenshot shows a product management interface with a search bar, filter options, and a table of products. The table includes columns for Product Name, Product Integration ID, Product Type, Region Name, Effective Date, and End Date. The 'New' button in the top right corner is highlighted with a red box.

	Product Name ↑	Product Integrati...	Product Type	Region Name	Effective Date	End Date
1	Arhimed	100799000000368	Detail	US	1/1/2020	
2	Babolofin	1000000088978	Detail	US	1/1/2020	
3	Baconopen	1000000088942	Detail	US	1/1/2020	
4	Balvan	10048000137256	Detail	US	1/1/2020	
5	Cardiology	1004900000003	Market	US	1/1/2020	
6	Cardiology	16474000000112	Brand	US	1/1/2020	
7	Caronol	10193000063205	Detail	US	1/1/2020	
8	Caronol-100mg	100691000027403	Sample	US	1/1/2020	
9	Caronol-25mg	100691000027391	Sample	US	1/1/2020	
10	Caronol-50mg	10047000011391	Sample	US	1/1/2020	
11	Caronol-75mg	10032800004177	Sample	US	1/1/2020	
12	Cordin	16474000000099	Detail	US	1/1/2020	
13	Damotrine	1000000088558	Detail	US	1/1/2020	
14	Dentropol	100799000004875	Detail	US	1/1/2020	
30+ Records						

- Enter information for the new product and click **Save**.

New Product

Information

* Product Name

Product Integration Id
OQWCL1LP284YQISTUH

* Effective Date

End Date

* Product Type

Product Description

* Region

Additional Details

Competitor Product

Is Co-Promote?

Detail Type

Therapeutic Area

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**.

	Product Name	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1	Arihmed	10079900000368	Detail	US	1/1/2020	
2	Babolofin	1000000088978	Detail	US	1/1/2020	
3	Baconopen	1000000088942	Detail	US	1/1/2020	
4	Balvan	10048000137256	Detail	US	1/1/2020	
5	Cardiology	10049000000003	Market	US	1/1/2020	
6	Cardiology	16474000000112	Brand	US	1/1/2020	
7	Caronol	10193000063205	Detail	US	1/1/2020	
8	Caronol-100mg	100691000027403	Sample	US	1/1/2020	
9	Caronol-25mg	100691000027391	Sample	US	1/1/2020	
10	Caronol-50mg	10047000011391	Sample	US	1/1/2020	
11	Caronol-75mg	100328000004177	Sample	US	1/1/2020	
12	Cordin	16474000000099	Detail	US	1/1/2020	

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

Product Integration Id	Product Type	Effective Date	End Date
10193000063205	Detail	1/1/2020	

Details	Alignments	Details History-Time	Alignments History-Time	Hierarchy
Product Name Caronol			Product Integration Id 10193000063205	
Effective Date 1/1/2020			End Date	
Product Type Detail			Product Description Caronol	
Region US				

- 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.

Edit Caronol

Information

* Product Name Caronol	Product Integration Id 10193000063205
* Effective Date Jan 1, 2020	End Date
* Product Type Detail	Product Description Caronol
* Region US	

Additional Details

Competitor Product <input type="checkbox"/>	Is Co-Promote? <input type="checkbox"/>
Detail Type Select an Option	Therapeutic Area Select an Option

Cascade [Cancel](#) [Save & New](#) [Save](#)

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

Delete a Product

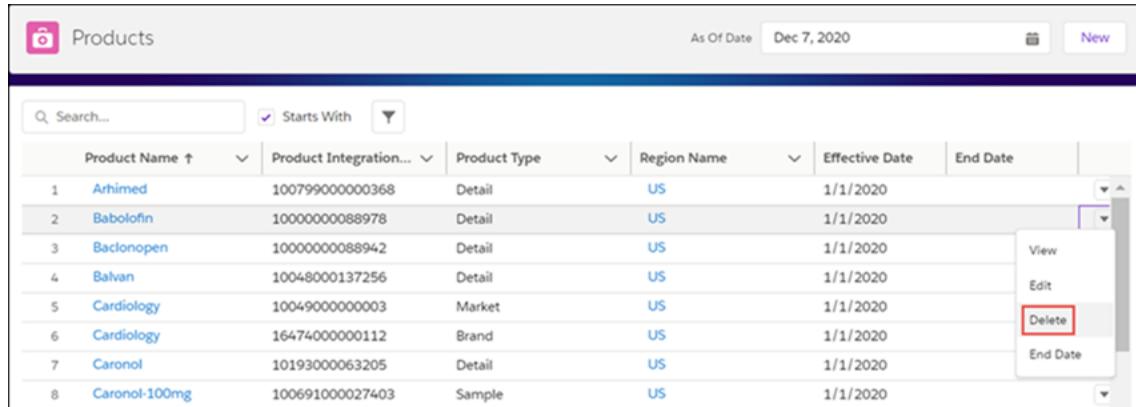
If you added a product by mistake, you can delete it from the system.

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](#).

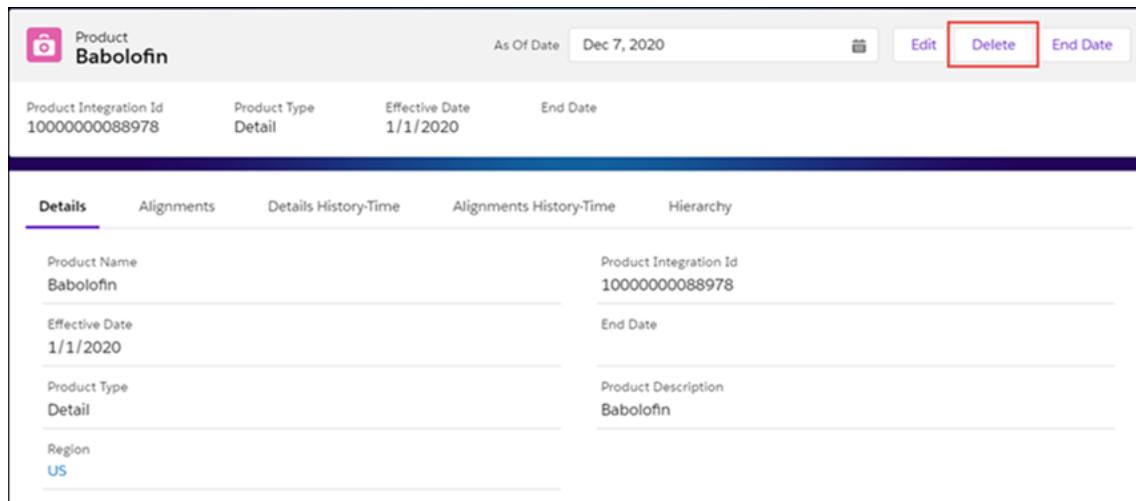
- Select the drop-down for the product you would like to delete and click **Delete**.



A screenshot of the Product list screen. The header says "Products" and shows "As Of Date: Dec 7, 2020". A context menu is open over the 8th row, which contains the product "Coronol-100mg". The menu options are "View", "Edit", "Delete", and "End Date". The "Delete" option is highlighted with a red box.

Product Name ↑	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1 Ahmed	100799000000368	Detail	US	1/1/2020	
2 Babolofin	10000000088978	Detail	US	1/1/2020	
3 Badlonopen	10000000088942	Detail	US	1/1/2020	
4 Balvan	10048000137256	Detail	US	1/1/2020	
5 Cardiology	10049000000003	Market	US	1/1/2020	
6 Cardiology	16474000000112	Brand	US	1/1/2020	
7 Coronol	10193000063205	Detail	US	1/1/2020	
8 Coronol-100mg	100691000027403	Sample	US	1/1/2020	

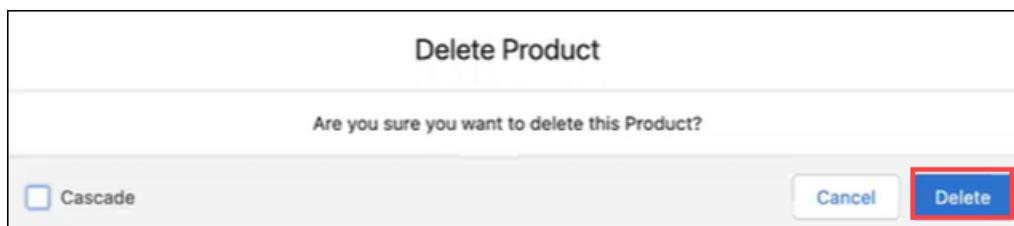
- Click the product name to go to the Product Details page, and then click **Delete**.



A screenshot of the Product Details screen for the product "Babolofin". The header says "Product Babolofin" and shows "As Of Date: Dec 7, 2020". The "Delete" button is highlighted with a red box. Below the header, there are fields for "Product Integration Id" (10000000088978), "Product Type" (Detail), "Effective Date" (1/1/2020), and "End Date". The main area shows details for the product, including "Product Name" (Babolofin), "Effective Date" (1/1/2020), "Product Type" (Detail), "Region" (US), "Product Integration Id" (10000000088978), "End Date", and "Product Description" (Babolofin).

3. Click **Delete** to confirm.

Note: To cascade the action to all underlying child records, click **Cascade**.



A screenshot of the "Delete Product" confirmation dialog. The title is "Delete Product". The message asks "Are you sure you want to delete this Product?". There is a checkbox labeled "Cascade" and two buttons: "Cancel" and "Delete", with "Delete" highlighted with a red box.

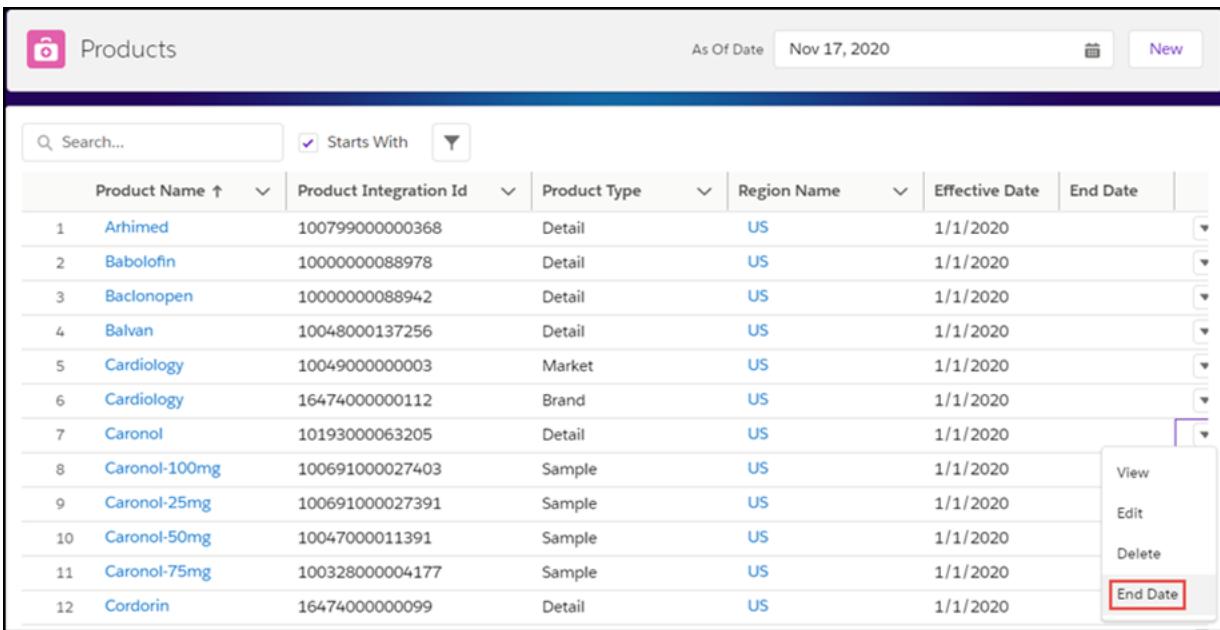
End Date a Product

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](#).

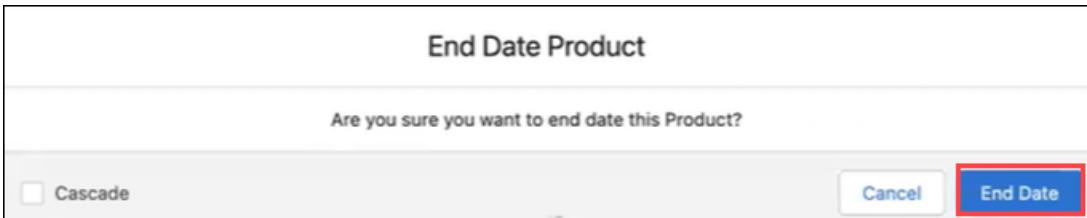
Note: Use the **Search**  and **Filters**  functions to help you locate the product. See [Search and Filter Functions](#).



	Product Name ↑	Product Integration Id	Product Type	Region Name	Effective Date	End Date	
1	Arhimed	100799000000368	Detail	US	1/1/2020		
2	Babolofin	10000000088978	Detail	US	1/1/2020		
3	Baclonopen	10000000088942	Detail	US	1/1/2020		
4	Balvan	10048000137256	Detail	US	1/1/2020		
5	Cardiology	10049000000003	Market	US	1/1/2020		
6	Cardiology	16474000000112	Brand	US	1/1/2020		
7	Caronol	10193000063205	Detail	US	1/1/2020		
8	Caronol-100mg	100691000027403	Sample	US	1/1/2020		
9	Caronol-25mg	100691000027391	Sample	US	1/1/2020		
10	Caronol-50mg	10047000011391	Sample	US	1/1/2020		
11	Caronol-75mg	100328000004177	Sample	US	1/1/2020		
12	Cordorin	16474000000099	Detail	US	1/1/2020		

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

Note: To cascade the action to all underlying child records, click **Cascade**.



End Date Product

Are you sure you want to end date this Product?

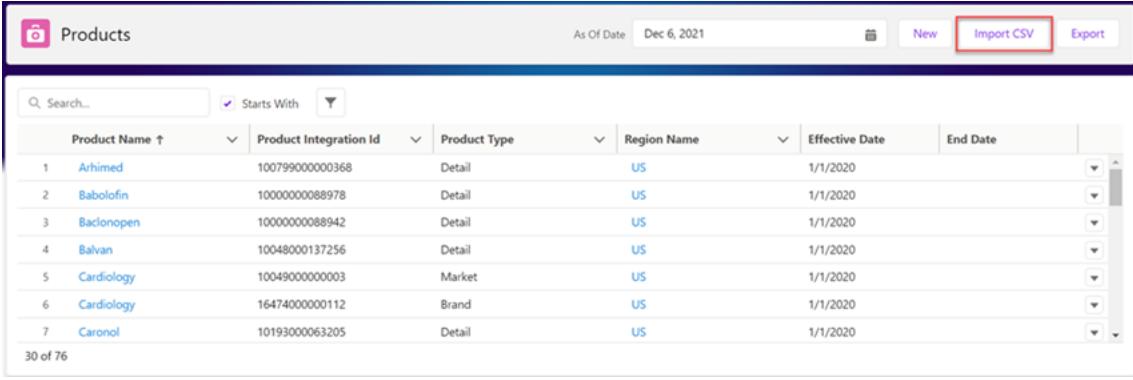
Cascade **End Date**

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.

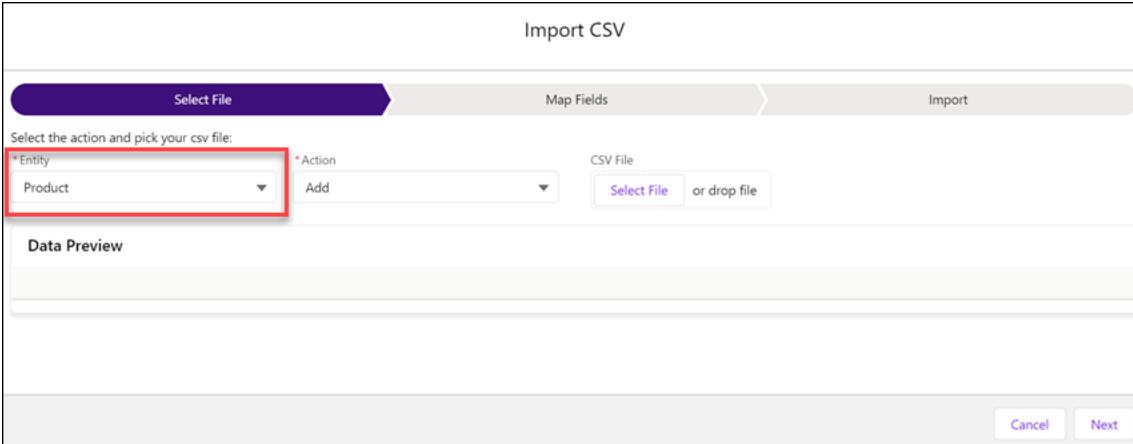
To import data into Products

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

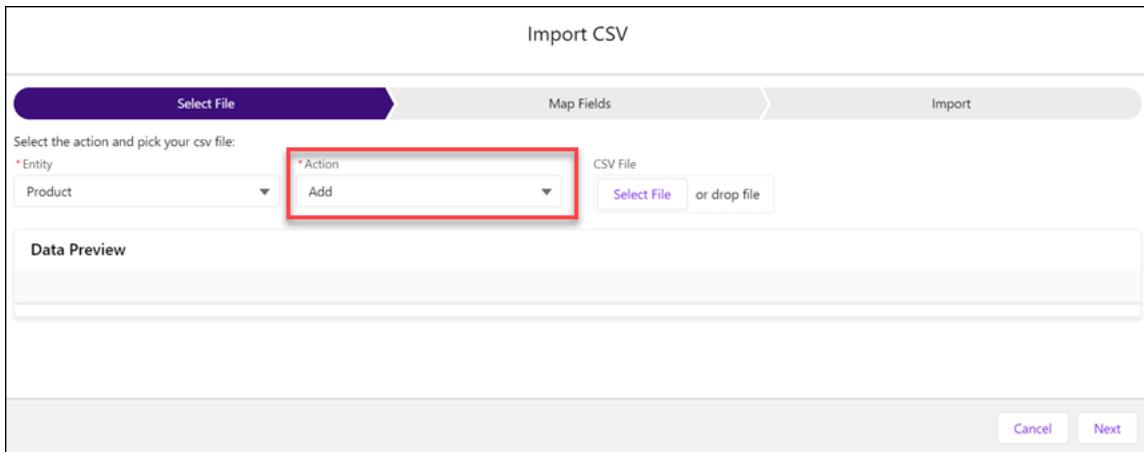


Product Name ↑	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1 Arhimed	100799000000368	Detail	US	1/1/2020	
2 Babolofin	10000000088978	Detail	US	1/1/2020	
3 Baclonopen	10000000088942	Detail	US	1/1/2020	
4 Balvan	10048000137256	Detail	US	1/1/2020	
5 Cardiology	10049000000003	Market	US	1/1/2020	
6 Cardiology	16474000000112	Brand	US	1/1/2020	
7 Caronol	10193000063205	Detail	US	1/1/2020	

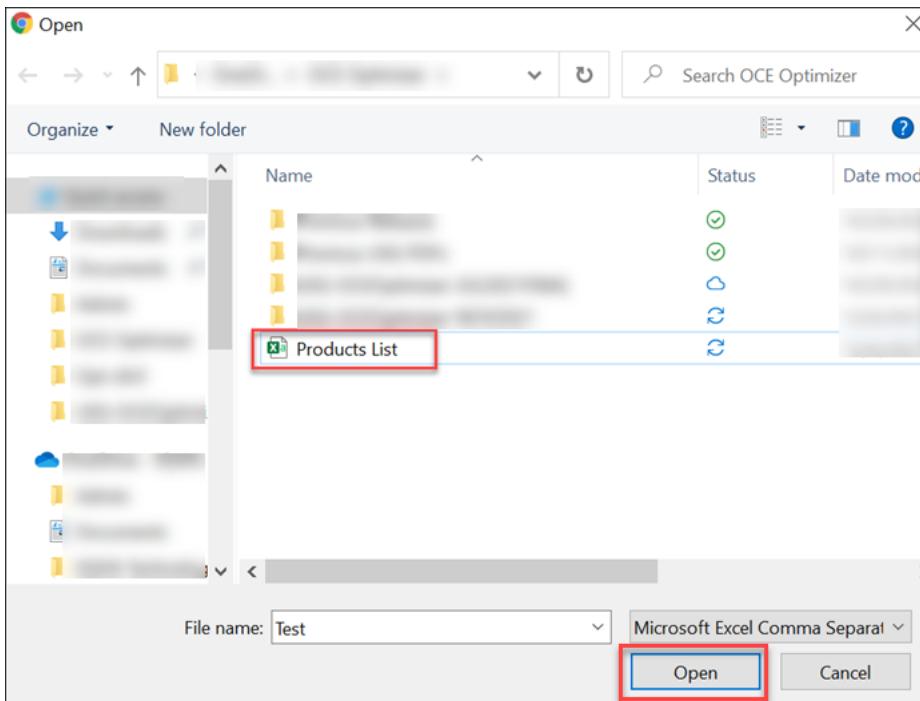
2. Select the entity, such as *Product*, *Product Hierarchy*, or *Product with Hierarchy*.



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**.

Import CSV

Select the action and pick your csv file:

*Entity: Product *Action: Add CSV File: or drop file

Data Preview

Product Name	Product Integration Id	Product Type	Region Name	Effective Date	End Date
Abatacept-Test	70001000001149	Market	Salinas Valley	12/5/2018	12/31/3999
Baclofen-Test	70001000001269	Market	Salinas Valley	12/5/2018	12/31/3999
Cafcit-Test	70001000001389	Market	Salinas Valley	12/5/2018	12/31/3999
Chlor Trimeton-Test	70001000001509	Market	Salinas Valley	12/5/2018	12/31/3999

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*.

Import CSV

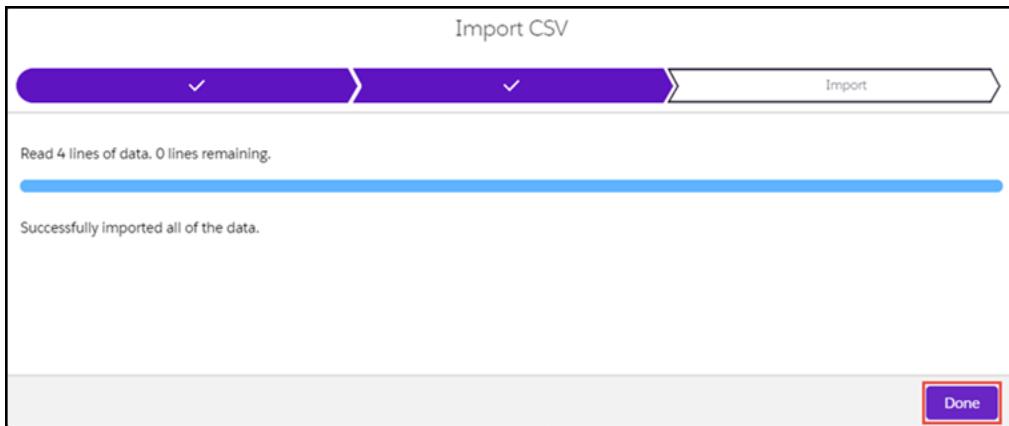
Map Fields Import

Each column found in the CSV file is displayed below. Please map each one to an object column by selecting from the dropdown.

For CSV Field:	Map to Object Field:
Product Name	Product Name
Product Integration Id	Product Integration Id (required)
Product Type	Product Type
Region Name	Select an Option
Effective Date	Effective Date
End Date	End Date
Cascade	Cascade

Previous Next

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](#)

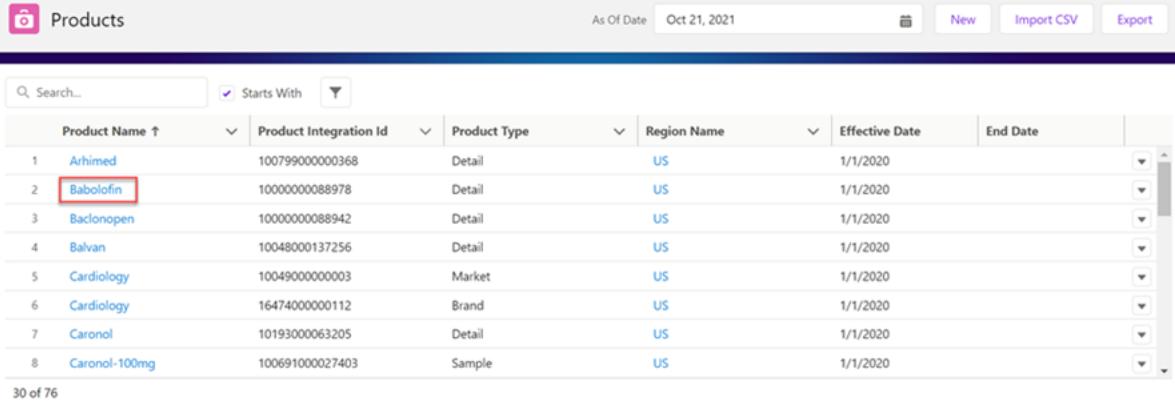
[**Add a Parent Hierarchy to a Product**](#)

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](#).



Product Name	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1 Arhimed	100799000000368	Detail	US	1/1/2020	
2 Babolofin	10000000088978	Detail	US	1/1/2020	
3 Baclonopen	10000000088942	Detail	US	1/1/2020	
4 Balvan	10048000137256	Detail	US	1/1/2020	
5 Cardiology	10049000000003	Market	US	1/1/2020	
6 Cardiology	16474000000112	Brand	US	1/1/2020	
7 Caronol	10193000063205	Detail	US	1/1/2020	
8 Caronol-100mg	100691000027403	Sample	US	1/1/2020	

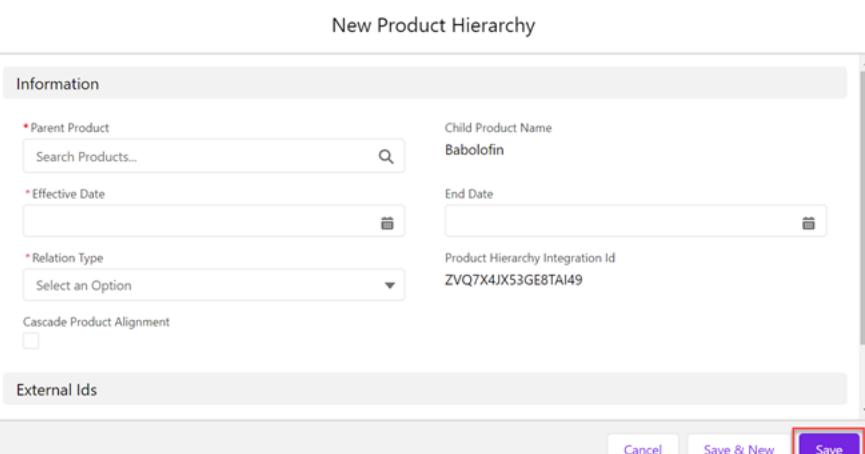
30 of 76

3. Scroll to the **Parent Products** section and click **New**.



Parent Products	
0 Records	

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



New Product Hierarchy

Information

- Parent Product:** Search Products...
- Child Product Name:** Babolofin
- Effective Date:** (dropdown)
- End Date:** (dropdown)
- Relation Type:** Select an Option
- Product Hierarchy Integration Id:** ZVQ7X4JX53GE8TAI49
- Cascade Product Alignment:** (checkbox)

External Ids

Cancel Save & New **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](#).

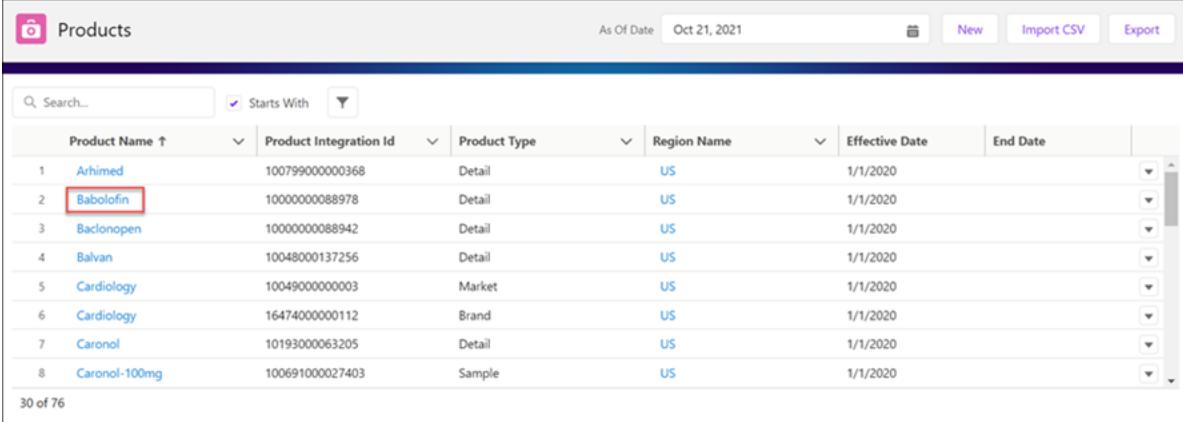
Modify a Parent Hierarchy Linked to a Product

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

To edit a parent hierarchy linked to a product

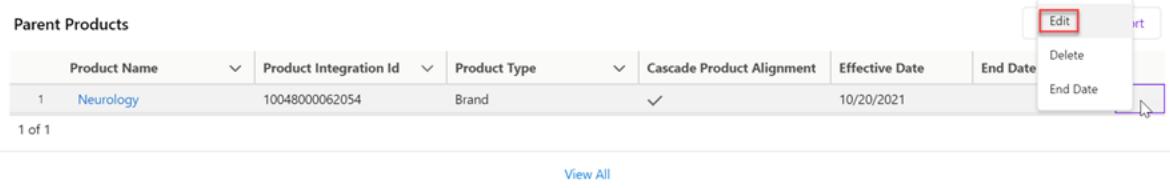
1. Click **Products** from the primary navigation bar.
2. Select the product that has the parent hierarchy you want to make changes to.

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



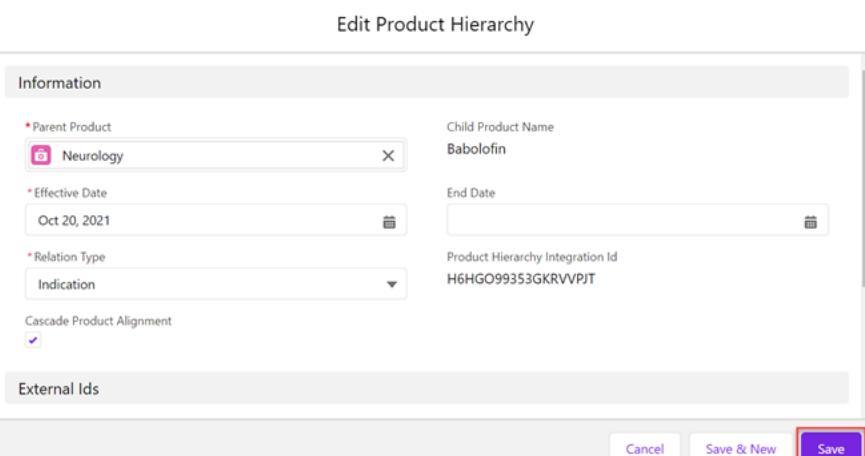
	Product Name	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1	Arhimed	100799000000368	Detail	US	1/1/2020	
2	Babolofin	10000000088978	Detail	US	1/1/2020	
3	Baclonopen	10000000088942	Detail	US	1/1/2020	
4	Balvan	10048000137256	Detail	US	1/1/2020	
5	Cardiology	10049000000003	Market	US	1/1/2020	
6	Cardiology	16474000000112	Brand	US	1/1/2020	
7	Caronol	10193000063205	Detail	US	1/1/2020	
8	Caronol-100mg	100691000027403	Sample	US	1/1/2020	

- From the **Details** tab, scroll to the **Parent Products** section, click the drop-down for the hierarchy you want to edit, then select **Edit**.



Parent Products						
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						

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



Edit Product Hierarchy

Information

* Parent Product: Neurology

Child Product Name: Babolofin

* Effective Date: Oct 20, 2021

End Date:

* Relation Type: Indication

Product Hierarchy Integration Id: H6HGO99353GKRVVPJT

Cascade Product Alignment:

External Ids

Buttons: Cancel, Save & New, Save (highlighted)

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

Delete a Parent Hierarchy Linked to a Product

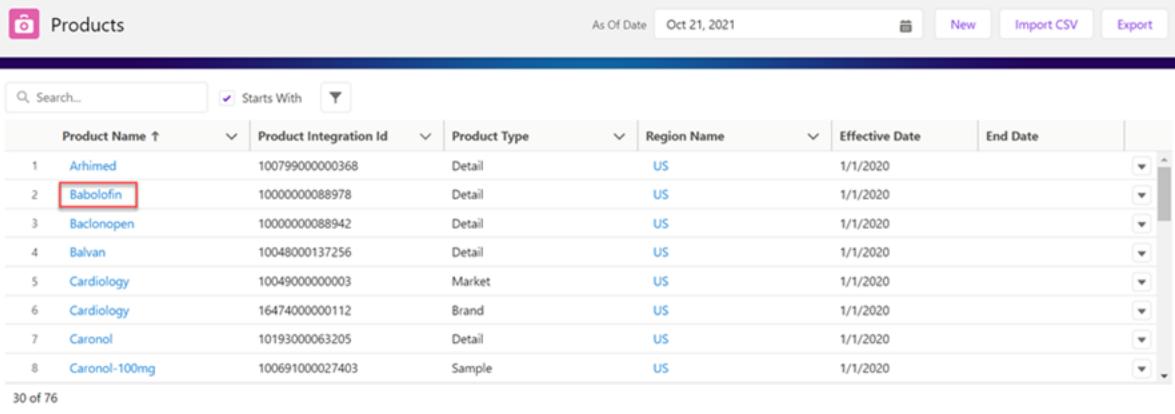
You can delete parent hierarchies linked to a product.

To delete a parent hierarchy linked to a product

- Click **Products** from the primary navigation bar.

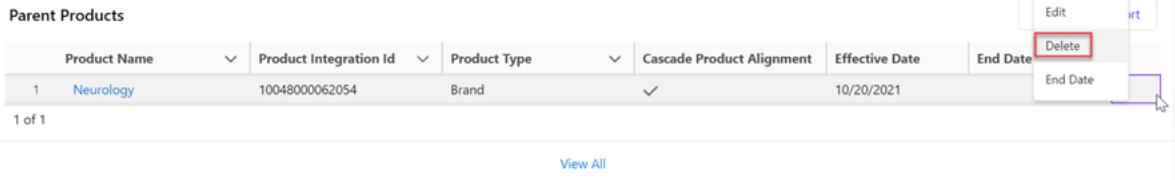
- Select the product that has the parent hierarchy you want to delete.

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



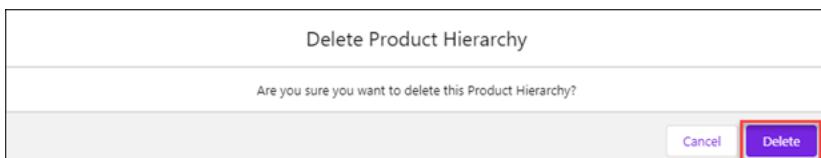
Product Name	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1 Arimed	100799000000368	Detail	US	1/1/2020	
2 Baboloftin	10000000088978	Detail	US	1/1/2020	
3 Baconopen	10000000088942	Detail	US	1/1/2020	
4 Balvan	100480000137256	Detail	US	1/1/2020	
5 Cardiology	10049000000003	Market	US	1/1/2020	
6 Cardiology	16474000000112	Brand	US	1/1/2020	
7 Caronol	10193000063205	Detail	US	1/1/2020	
8 Caronol-100mg	100691000027403	Sample	US	1/1/2020	

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



Parent Products						
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						

- Click **Delete** to confirm.



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

[End Date a Parent Hierarchy Linked to a Product](#)

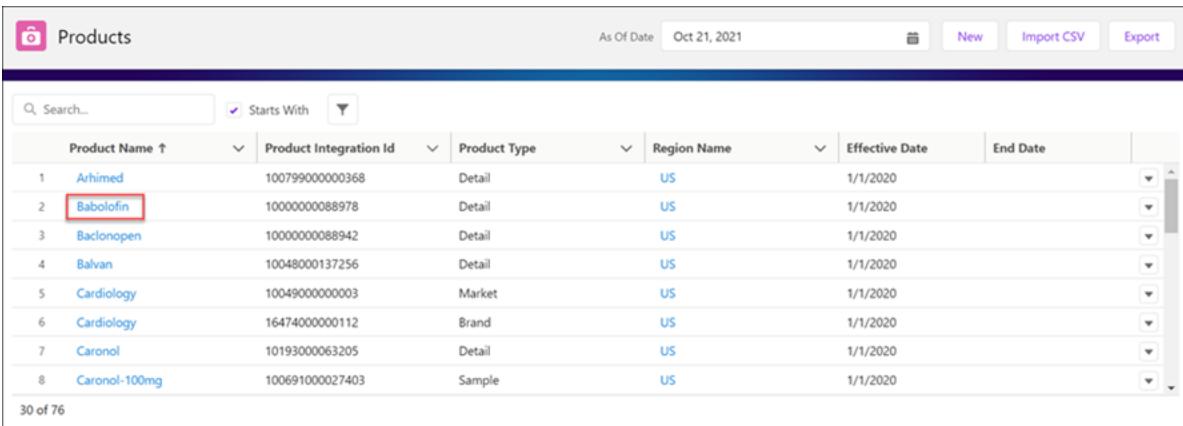
You can end date parent hierarchies linked to a product.

To end date a parent hierarchy linked to a product

- Click **Products** from the primary navigation bar.

- Select the product that has the parent hierarchy you want to end date.

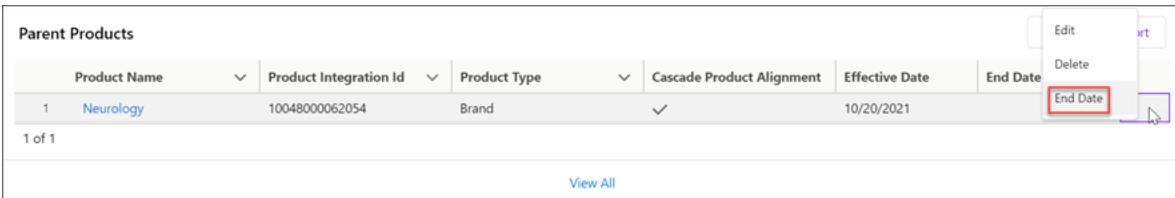
Note: Use the **Search**  and **Filters**  functions to help you locate the product. See [Search and Filter Functions](#).



Product Name	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1 Arimed	100799000000368	Detail	US	1/1/2020	
2 Babolofin	10000000088978	Detail	US	1/1/2020	
3 Baconopen	10000000088942	Detail	US	1/1/2020	
4 Balvan	100480000137256	Detail	US	1/1/2020	
5 Cardiology	10049000000003	Market	US	1/1/2020	
6 Cardiology	16474000000112	Brand	US	1/1/2020	
7 Caronol	10193000063205	Detail	US	1/1/2020	
8 Caronol-100mg	100691000027403	Sample	US	1/1/2020	

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- 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**.

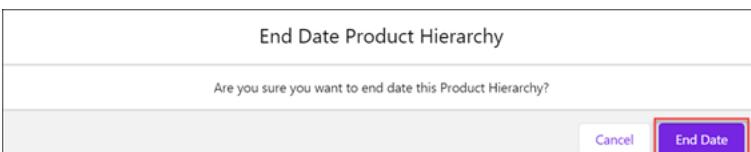


Product Name	Product Integration Id	Product Type	Cascade Product Alignment	Effective Date	End Date
1 Neurology	10048000062054	Brand	✓	10/20/2021	Edit Delete End Date

1 of 1

[View All](#)

- Click **End Date** to end date the product hierarchy.



End Date Product Hierarchy

Are you sure you want to end date this Product Hierarchy?

[Cancel](#) [End Date](#)

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](#)

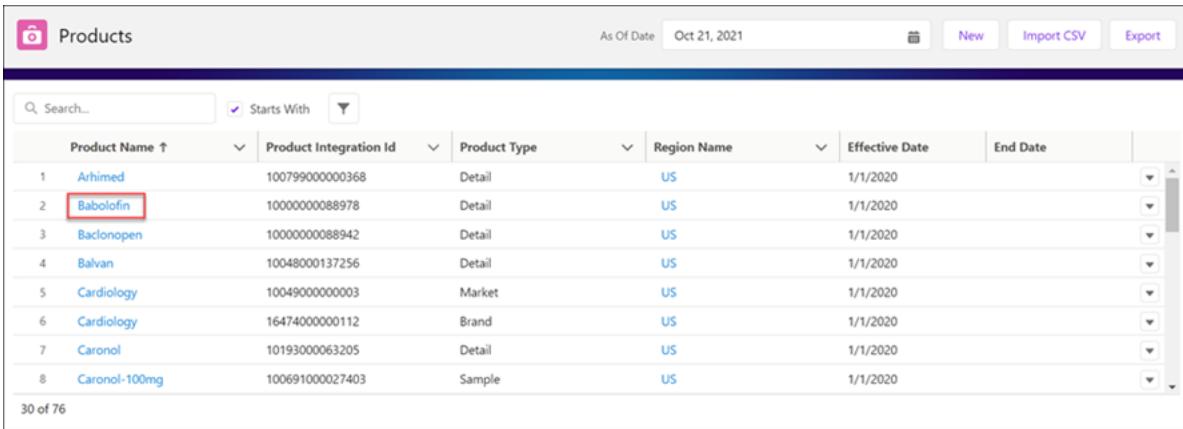
Add a Child Hierarchy to a Product

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](#).



Product Name ↑	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1 Arhimed	100799000000368	Detail	US	1/1/2020	
2 Babolofin	10000000088978	Detail	US	1/1/2020	
3 Baconopen	10000000088942	Detail	US	1/1/2020	
4 Balvan	10048000137256	Detail	US	1/1/2020	
5 Cardiology	10049000000003	Market	US	1/1/2020	
6 Cardiology	16474000000112	Brand	US	1/1/2020	
7 Caronol	10193000063205	Detail	US	1/1/2020	
8 Caronol-100mg	100691000027403	Sample	US	1/1/2020	

3. Scroll to the **Child Products** section and click **New**.



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

New Product Hierarchy

Information	
<p>*Child Product Search Products... <input type="button" value="🔍"/></p> <p>*Effective Date <input type="text"/></p> <p>*Relation Type Select an Option <input type="button" value="▼"/></p> <p>Cascade Product Alignment <input type="checkbox"/></p>	<p>Parent Product Name Caronol</p> <p>End Date <input type="text"/></p> <p>Product Hierarchy Integration Id 2LYXYSX053N57DVK4P</p>
External Ids	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="outline: 2px solid red; border-radius: 5px;" type="button" value="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

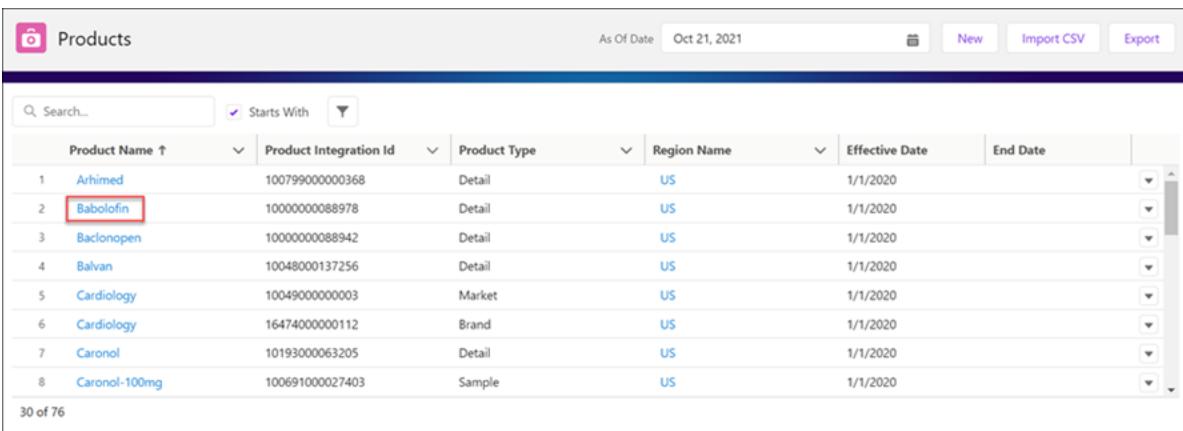
You can make updates to child hierarchies linked to a product.

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.

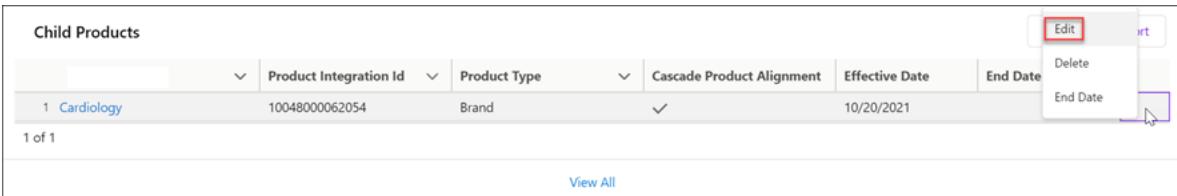
Note: Use the **Search**  and **Filters**  functions to help you locate the product. See [Search and Filter Functions](#).



	Product Name	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1	Arihmed	100799000000368	Detail	US	1/1/2020	
2	Babolofin	10000000088978	Detail	US	1/1/2020	
3	Bacionopen	10000000088942	Detail	US	1/1/2020	
4	Balvan	10048000137256	Detail	US	1/1/2020	
5	Cardiology	10049000000003	Market	US	1/1/2020	
6	Cardiology	16474000000112	Brand	US	1/1/2020	
7	Caronol	10193000063205	Detail	US	1/1/2020	
8	Caronol-100mg	100691000027403	Sample	US	1/1/2020	

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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**.



Child Products					
	Product Integration Id	Product Type	Cascade Product Alignment	Effective Date	End Date
1	Cardiology	10048000062054	Brand	✓	10/20/2021
1 of 1					
View All					

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.

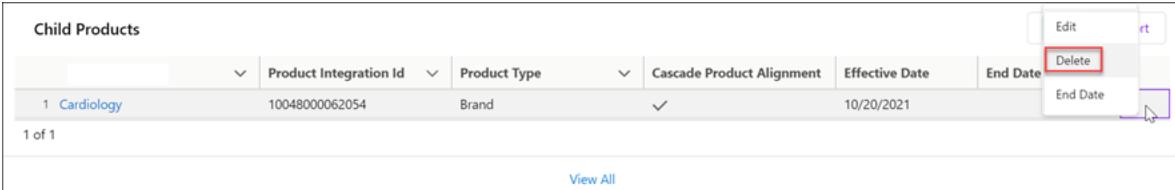
To delete a child hierarchy linked to a product

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](#).

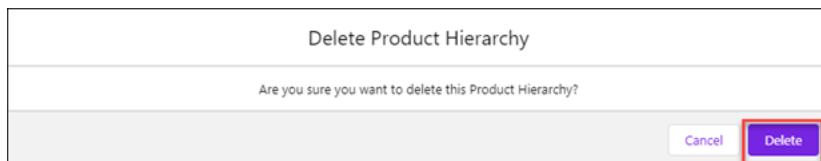
Product Name ↑	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1 Arhimed	100799000000368	Detail	US	1/1/2020	
2 Babolofin	10000000088978	Detail	US	1/1/2020	
3 Baconopen	10000000088942	Detail	US	1/1/2020	
4 Balvan	10048000137256	Detail	US	1/1/2020	
5 Cardiology	10049000000003	Market	US	1/1/2020	
6 Cardiology	16474000000112	Brand	US	1/1/2020	
7 Caronol	10193000063205	Detail	US	1/1/2020	
8 Caronol-100mg	100691000027403	Sample	US	1/1/2020	
30 of 76					

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



Child Products						
	Product Integration Id	Product Type	Cascade Product Alignment	Effective Date	End Date	Actions
1 Cardiology	10048000062054	Brand	✓	10/20/2021		Edit Delete
1 of 1						
View All						

- Click **Delete** to confirm.



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

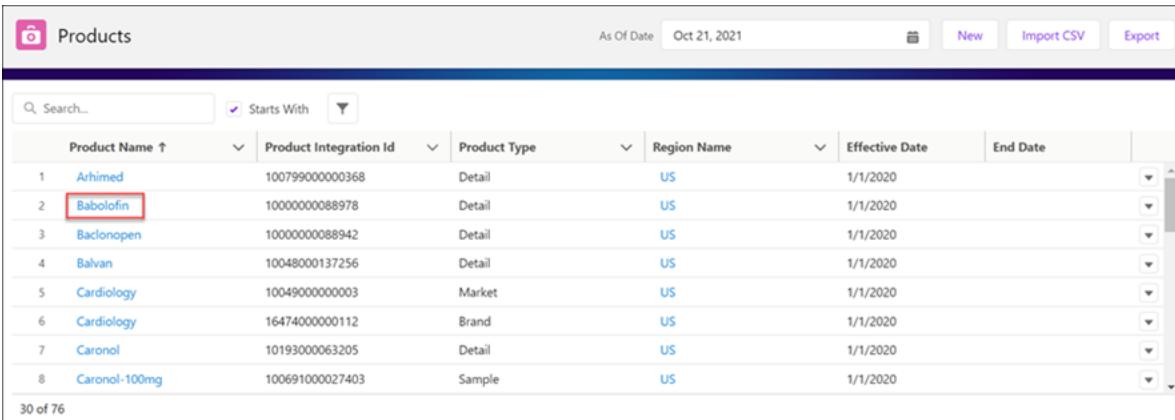
End Date a Child Hierarchy Linked to a Product

You can end date child hierarchies linked to a product.

To end date a child hierarchy linked to a product

- Click **Products** from the primary navigation bar.
- 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](#).



Product Name	Product Integration Id	Product Type	Region Name	Effective Date	End Date
1 Arhimed	100799000000368	Detail	US	1/1/2020	
2 Babolofin	10000000088978	Detail	US	1/1/2020	
3 Baclonopen	10000000088942	Detail	US	1/1/2020	
4 Balvan	10048000137256	Detail	US	1/1/2020	
5 Cardiology	10049000000003	Market	US	1/1/2020	
6 Cardiology	16474000000112	Brand	US	1/1/2020	
7 Caronol	10193000063205	Detail	US	1/1/2020	
8 Caronol-100mg	100691000027403	Sample	US	1/1/2020	

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**.

Child Products						Actions
Product Name	Product Integration Id	Product Type	Cascade Product Alignment	Effective Date	End Date	
1 Neurology	10048000062054	Brand	✓	10/20/2021		Edit Delete End Date
1 of 1						
View All						

4. Click **End Date** to end date the product hierarchy.

End Date Product Hierarchy

Are you sure you want to end date this Product Hierarchy?

[Cancel](#) [End Date](#)

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 \(Reps and District Managers\)](#).

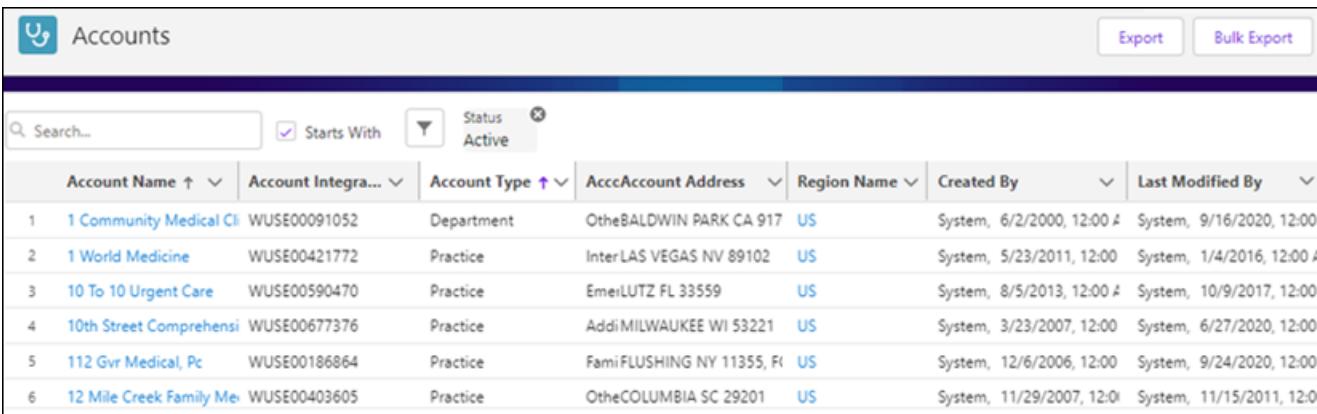
View Account Information (Home Office)

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.



Account Name ↑ ↓	Account Integra... ↑ ↓	Account Type ↑ ↓	AcccAddress ↑ ↓	Region Name ↑ ↓	Created By ↑ ↓	Last Modified By ↑ ↓
1 Community Medical C	WUSE00091052	Department	OtheBALDWIN PARK CA 917	US	System, 6/2/2000, 12:00 A	System, 9/16/2020, 12:00
2 1 World Medicine	WUSE00421772	Practice	InterLAS VEGAS NV 89102	US	System, 5/23/2011, 12:00	System, 1/4/2016, 12:00 A
3 10 To 10 Urgent Care	WUSE00590470	Practice	EmerLUTZ FL 33559	US	System, 8/5/2013, 12:00 A	System, 10/9/2017, 12:00
4 10th Street Comprehensi	WUSE00677376	Practice	AddiMILWAUKEE WI 53221	US	System, 3/23/2007, 12:00	System, 6/27/2020, 12:00
5 112 Gvr Medical, Pc	WUSE00186864	Practice	FamiFLUSHING NY 11355, F	US	System, 12/6/2006, 12:00	System, 9/24/2020, 12:00
6 12 Mile Creek Family Me	WUSE00403605	Practice	OtheCOLUMBIA SC 29201	US	System, 11/29/2007, 12:0	System, 11/15/2011, 12:00

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.

As Of Date	Dec 8, 2020	
------------	-------------	--

Highlight Section

Account 1 Community Medical Clinic	As Of Date Nov 4, 2021	
Account Integration Id WUSE00091052	Account Type Department	Account Specialty Other specialty

- **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.

Details	Affiliations	Alignments	Alignments History-Time	Hierarchy
Account Name 1 Community Medical Clinic				Account Integration Id WUSE00091052
First Name				Last Name
Middle Name				Account Type Department
Account Sub Type Lab				Organization Types Institution
Individual Types				Account Specialty Other specialty
Professional Title				Region Name US
Status Active				

Accounts Details Tab

The **Details** tab contains general information about the accounts, external IDs, and account addresses.

General Information

Details	Affiliations	Alignments	Alignments History-Time	Hierarchy
Account Name 1 Community Medical Clinic				Account Integration Id WUSE00091052
First Name				Last Name
Middle Name				Account Type Department
Account Sub Type Lab				Organization Types Institution
Individual Types				Account Specialty Other specialty
Professional Title				Region Name US
Status Active				

- **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 IDs	
External ID1 148227670	External ID2 148227670
External ID3	External ID4
External ID5	

- **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 Address							Export
Account Name ↑	Address Type	Address Line 1	Address Line 2	City	State Code	Postal Code	
1 112 Gvr Medical, P.C.	Business	6960 108th St		FOREST HILLS	NY	11375	
2 Newyork Presbyterian Queens	Business	5645 Main St		FLUSHING	NY	11355	
2 of 2							
View All							

- **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 deact...	"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	▼
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

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						

- **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 Integration ID	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						
	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	L1B2XVB526C5GS60GP	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(HQ) Smith, 12/6/2021, 8:43 AM	Adam(HQ) Smith, 12/6/2021, 8:43 AM	

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

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		

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	
View All						

For details on the fields in this section, see the **Account Product Territory Restrictions** section in [Accounts Alignments Tab](#).

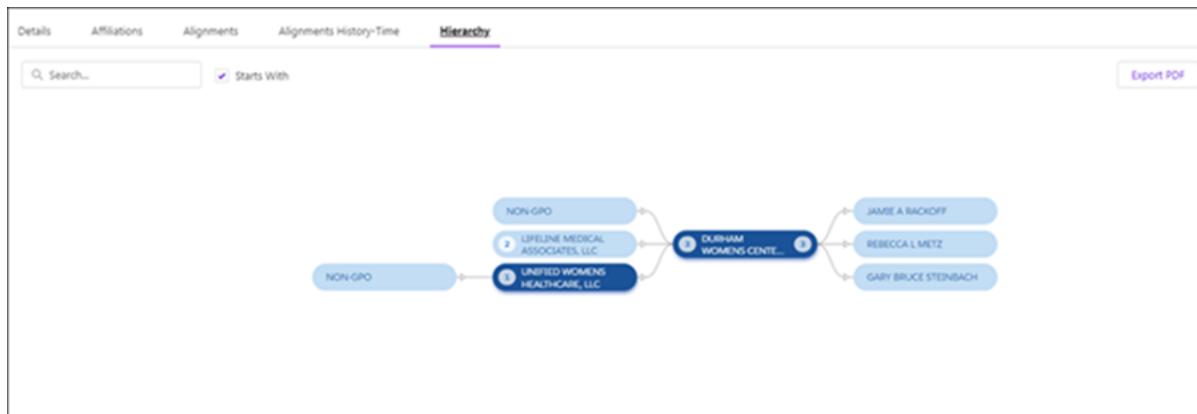
Account Product Territory Restrictions Explicit

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	
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**.

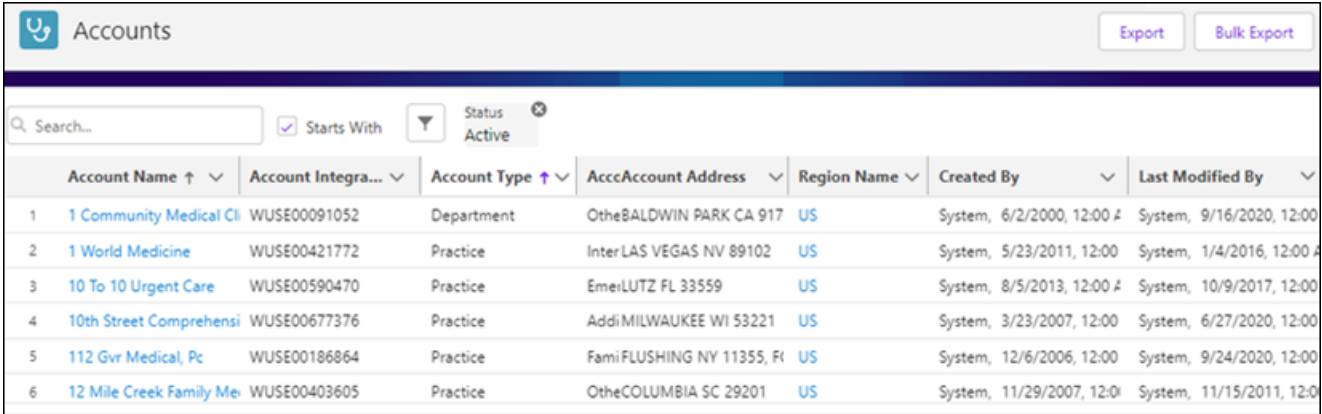
View Account Information (Reps and District Managers)

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](#).



Account Name ↑	Account Integra... ↓	Account Type ↑ ↓	AcccAccount Address ↓	Region Name ↓	Created By ↓	Last Modified By ↓
1 1 Community Medical Cll	WUSE00091052	Department	OtheBALDWIN PARK CA 917	US	System, 6/2/2000, 12:00 AM	System, 9/16/2020, 12:00 AM
2 1 World Medicine	WUSE00421772	Practice	InterLAS VEGAS NV 89102	US	System, 5/23/2011, 12:00 AM	System, 1/4/2016, 12:00 AM
3 10 To 10 Urgent Care	WUSE00590470	Practice	EmerLUTZ FL 33559	US	System, 8/5/2013, 12:00 AM	System, 10/9/2017, 12:00 AM
4 10th Street Comprehensi	WUSE00677376	Practice	AddiMILWAUKEE WI 53221	US	System, 3/23/2007, 12:00 AM	System, 6/27/2020, 12:00 AM
5 112 Gvr Medical, Pc	WUSE00186864	Practice	FamiFLUSHING NY 11355, Fl	US	System, 12/6/2006, 12:00 AM	System, 9/24/2020, 12:00 AM
6 12 Mile Creek Family Me	WUSE00403605	Practice	OtheCOLUMBIA SC 29201	US	System, 11/29/2007, 12:00 AM	System, 11/15/2011, 12:00 AM

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.

The screenshot shows a search bar with the placeholder "Search accounts". Below it is a date picker labeled "As Of Date" with the value "Dec 8, 2020". A calendar icon is also present.

Highlight Section

The screenshot shows a search bar with the placeholder "Search accounts". Below it is a table with the following data:

Account Integration Id	Account Type	Account Specialty
WUSE00091052	Department	Other specialty

At the top right, there is a date selector labeled "As Of Date Nov 4, 2021".

- **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.

The screenshot shows the "Details" tab of the Accounts screen. The table contains the following data:

Details	Affiliations	Hierarchy
Account Name 1 Community Medical Clinic	Account Integration Id WUSE00091052	
First Name	Last Name	
Middle Name	Account Type Department	
Account Sub Type Lab	Organization Types Institution	
Individual Types	Account Specialty Other specialty	
Professional Title	Region Name US	
Status Active		

At the top right, there is a date selector labeled "As Of Date Oct 13, 2021".

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	1 Community Medical Clinic			As Of Date	Dec 14, 2022	
Account Integration Id WUSE00091052	Account Type Department	Account Specialty Other specialty				
Details	Affiliations	Alignments	Alignments History-Time	Hierarchy		
Account Name 1 Community Medical Clinic				Account Integration Id WUSE00091052		
First Name				Last Name		
Middle Name				Account Type Department		
Account Sub Type Lab				Organization Types Institution		
Individual Types				Account Specialty Other specialty		
Professional Title				Region Name US		
Status Active						

- **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 IDs	
External ID1 148227670	External ID2 148227670
External ID3	External ID4
External ID5	

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

Audit Information

Audit Information	
Created By System , 6/2/2000, 12:00 AM	Last Modified By System , 9/16/2020, 12:00 AM

- **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 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 deact...	"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.

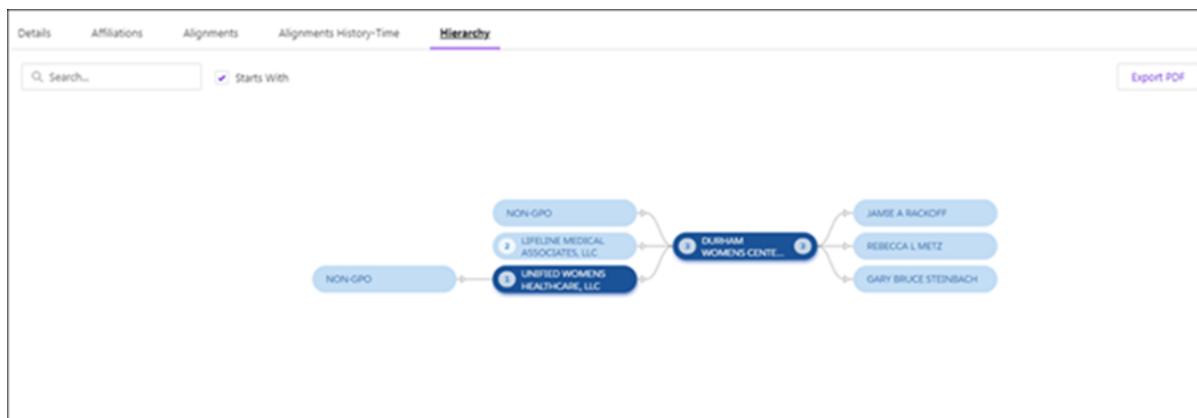
Account Product Territory Ratings

- **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).

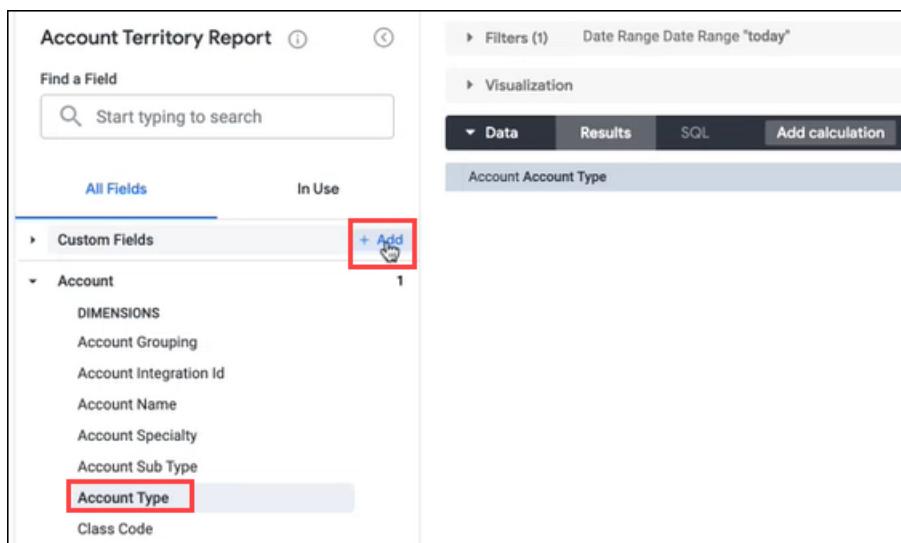
To view the details of an account, click the account name in the node.

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

Looker Edit

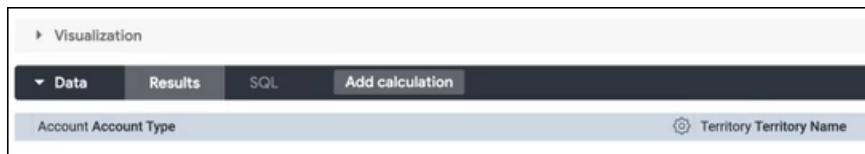
A user with User Explore access has a user-friendly and meaningful set of fields available in the Explore for Territory Roster Report.

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 screenshot shows the 'Account Territory Report' in the Looker Edit interface. On the left, there's a sidebar with a search bar and tabs for 'All Fields' and 'In Use'. Under 'Custom Fields', the 'Account' category is expanded, showing dimensions like 'DIMENSIONS', 'Account Grouping', 'Account Integration Id', 'Account Name', 'Account Specialty', 'Account Sub Type', and 'Account Type'. The 'Account Type' field is highlighted with a red box. At the top right of the sidebar, there's a '+ Add' button with a hand cursor hovering over it. The main area shows filters ('Filters (1) Date Range Date Range "today"') and a visualization section. Below the visualization, there are tabs for 'Data', 'Results', 'SQL', and 'Add calculation'. The 'Data' tab is selected. The visualization itself shows two fields: 'Account Account Type' and 'Territory Territory Name'.

The added field appears on the right.



This screenshot shows the same 'Account Territory Report' interface as the previous one, but with a few changes. The 'Data' tab is now selected. In the visualization, the 'Territory Territory Name' field has been added next to the 'Account Account Type' field, indicating that the 'Account Type' field has been successfully added to the report.

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.

Territory Name	Territory Integration Id	Territory Type	Sales Force Name	User Name	Region Name	Effective Date	End Date
1 MSL Alabama	6CZV1TZKQJQ0UM576LS	District	MSL		US	5/1/2021	
2 MSL Alaska	J7FF48E53Q0UM57GAY	District	MSL		US	5/1/2021	
3 MSL Arizona	OKV1B0EZ3Q0UM5700R	District	MSL	Bart Huff	US	5/1/2021	
4 MSL Arizona	06P1ZCF99Q0UM5700S	District	MSL		US	5/1/2021	
5 MSL Business Unit	0V0G2T03Q0UM57VQI	Business Unit	MSL		US	5/1/2021	
6 MSL California	HUVEZD3Q0LM583GE	District	MSL	Clara Bowers	US	5/1/2021	
7 MSL Colorado	MIM77W2K3Q0LM583GF	District	MSL		US	5/1/2021	
8 MSL Connecticut	ITLURP8F3Q0LM588H	District	MSL		US	5/1/2021	
9 MSL DIST of Columbia	5XNCT5F93Q0LM581W2	District	MSL		US	5/1/2021	
10 MSL Delaware	IBY3QKQ3Q0LM588W1	District	MSL		US	5/1/2021	
11 MSL East North Central	QFPFACD3Q0LM58QLV	Area	MSL	Angelica Bennett	US	5/1/2021	
12 MSL East South Central	KARHQU4W3Q0LM581B0	Area	MSL		US	5/1/2021	
13 MSL Florida	LV2L6RMHC3Q0LM581BP	District	MSL		US	5/1/2021	
14 MSL Georgia	ZEZ2OYKE3Q0LM589II	District	MSL		US	5/1/2021	
15 MSL Hawaii	40B385B3Q0LM596IU	District	MSL		US	5/1/2021	
16 MSL Idaho	6KHNPF3Q0LM589RC	District	MSL		US	5/1/2021	
17 MSL Illinois	OVUHUMM33Q0LM58H5	District	MSL		US	5/1/2021	
18 MSL Indiana	EVBWV9A03Q0LM589LH	District	MSL	Debbie Wheeler	US	5/1/2021	
19 MSL Iowa	GW77V4L43Q0LM587Z	District	MSL		US	5/1/2021	
20 MSL Kansas	HK757Chv103 MSA0NE5	District	MSL		US	5/1/2021	

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.

Account Alignments							
	Account Name	Account Integration Id	Account Type	Source	Reason	Effective Date	End Date
1	PRIYANKA GOEL-VENUGOPAL		Medical Professional	Dynamic	OBGYN - In Geo Practice	12/1/2020	
2	WINGKAN WINNIE SBAR		Medical Professional	Dynamic	OBGYN - In Geo Practice	12/1/2020	
3	STEVEN WAYNE DOMNITZ		Medical Professional	Dynamic	OBGYN - In Geo Practice	12/1/2020	
4	ASSOCIATES IN WOMENS HEALTH		Practice	Dynamic	OBGYN - In Geo Practice	12/1/2020	
5	MELISSA CLAIRE BENTLEY		Medical Professional	Dynamic	OBGYN - In Geo Practice	12/1/2020	

5 Records

View All

4. View the analysis.

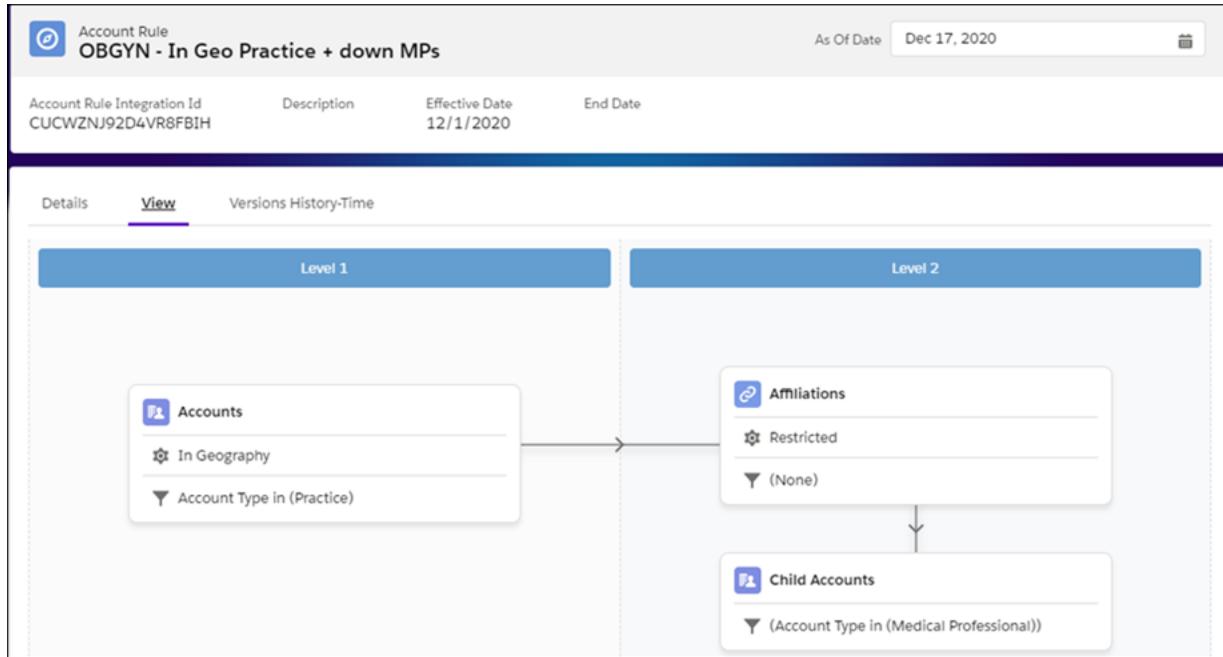
Note: If a territory has moved to a different salesforce, it is no longer assigned to the previous salesforce rule and will have a *Not Aligned* value in the **End Date: On** column of the analysis.

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.

Root Cause Analysis				
Account Name	Account Integration Id	Effective Date	End Date	
WINGKAN WINNIE SBAR	CUCWZNJ92D4...	12/1/2020		
Account Rule Name	Account Rule Inte...	Effective Date	End Date	
OBGYN - In Geo Pract...	CUCWZNJ92D4...	12/1/2020		
Attributes	Effective Date: 12/1/2020		End Date:	
VersionNumber	Before	On	Before	On
Address	WAYNE, , 07470	WAYNE, , 07470		
Address	POMPTON PLAINS, , 07444	POMPTON PLAINS, , 07444		
Address	MOUNTAIN LAKES, , 07046	MOUNTAIN LAKES, , 07046		
Affiliation to	Not Aligned	Practice, ASSOCIATES IN WOMENS HEALTHCARE		

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.

Search...					
	Starts With	Postal Code			
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**.

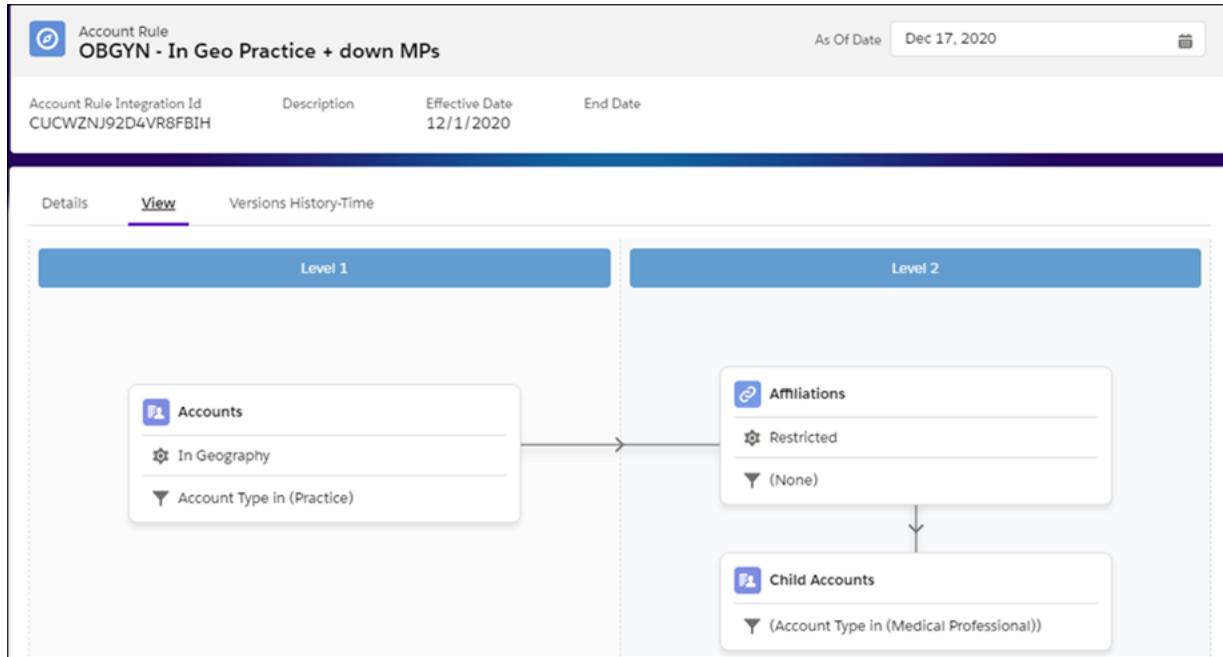
Account Territory							Export
	Territory Name ↑	Territory Integration Id	Source	Reason	Effective Date	End Date	
1	OBGYN - Morris County	GCYL56SN2D4KOKOIEH	Dynamic	OBGYN - In Geo Practice + down MPs,	12/1/2020		
2	Vaccine - Morris County	4L4NLDBV26C530904P	Dynamic	Vaccine - In Geo Practice + down MPs	11/12/2020		Root Cause
2 Records							
View All							

4. View the analysis.

Note: To view the associated rule, click the name of the rule in the **Account Rule Name** field.

Root Cause Analysis					
Account Name	Account Integration Id	Effective Date	End Date		
WINGKAN WINNIE SBAR	CUCWZNJ92D4...	12/1/2020			
OBGYN - In Geo Pract...	Account Rule Inte...	Effective Date 12/1/2020	End Date		
Attributes	Effective Date: 12/1/2020			End Date:	
VersionNumber	Before	On		Before	On
Address	WAYNE, , 07470	WAYNE, , 07470			
Address	POMPTON PLAINS, , 07444	POMPTON PLAINS, , 07444			
Address	MOUNTAIN LAKES, , 07046	MOUNTAIN LAKES, , 07046			
Affiliation to	Not Aligned	Practice, ASSOCIATES IN WOMENS HEALTHCARE			

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.



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.

Account Product Rule Name	Account Product Rule Integration Id	Description	Sales Force	Sales Force Integration Id	Effective Date
1 Account Product Rule A	S7NBVV3N26YB2H0EE1	Vaccine SF	7LRZHWXK26C3SG8XD5	11/13/2020	
2 APR 1436	I99DIV882DFBT68FH5	Diabetes Sales	10000000087424	12/4/2020	
3 OBGYN APR	EDE8MPFN2DE5JKBR9L			12/4/2020	

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	Account Product Rule A	As Of Date	Dec 16, 2020	
Account Product Rule Integration Id S7NBVV3N26YB2H0EE1	Description	Effective Date 11/13/2020	End Date	

- **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	Account Product Rule 1422	As Of Date	Sep 7, 2021	
Account Product Rule Integration Id AMBMAA3V2CTWFRM9M1	Description	Effective Date 1/1/2020	End Date	
<hr/>				
Details	View	Versions	History	Time
Account Product Rule Name Account Product Rule 1422		Account Product Rule Integration Id AMBMAA3V2CTWFRM9M1		
Effective Date 1/1/2020		End Date		
Description		Sales Force Diabetes Sales		
External IDs				
Audit Information				

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

The screenshot shows the 'Account Product Rule' details page for 'Account Product Rule 1422'. The top header includes the rule name, integration ID (AMBMAA3V2CTWFRM9M1), and a timestamp ('As Of Date Sep 7, 2021'). Below the header, there are four columns: 'Account Product Rule Integration Id' (AMBMAA3V2CTWFRM9M1), 'Description' (Account Product Rule 1422), 'Effective Date' (1/1/2020), and 'End Date'. A horizontal bar separates this from the main content area. The main content area has tabs for 'Details' (selected), 'View', and 'Versions History-Time'. Under 'Details', there are sections for 'Account Product Rule Name' (Account Product Rule 1422), 'Effective Date' (1/1/2020), 'Description' (Diabetes Sales), 'Account Product Rule Integration Id' (AMBMAA3V2CTWFRM9M1), 'End Date' (empty), and 'Sales Force' (Diabetes Sales). At the bottom, two collapsed sections are shown: 'External Ids' and 'Audit 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

The 'External IDs' section is shown with a single entry: 'External ID1'.

- **External ID1:** An additional identification number for cross referencing.

Audit Information

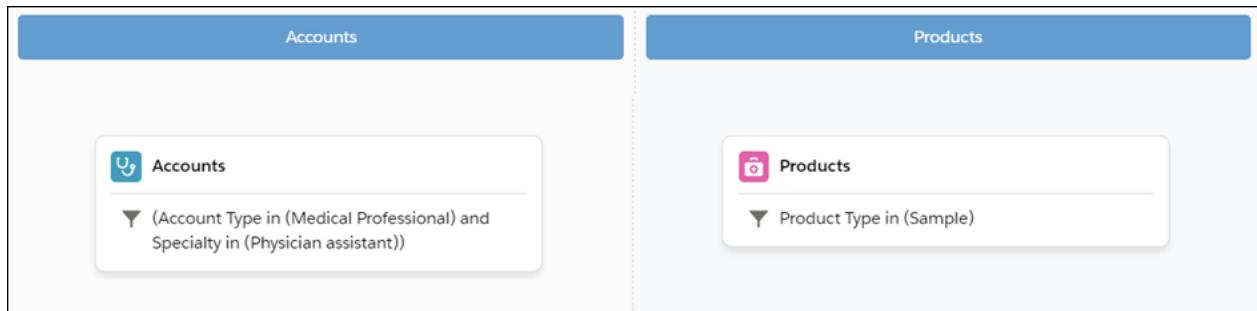
The 'Audit Information' section shows the following details:
Created By: Document Global Ho, 8/13/2020, 8:53 AM
Last Modified By: Document Global Ho, 8/13/2020, 8:53 AM

- **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

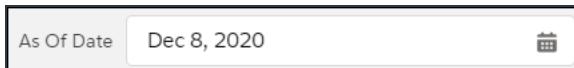
1. Click **Account Rules** from the primary navigation bar.
2. Select the account rule you want to view.

Account Rules		As Of Date	Nov 30, 2020		
Q, Search...		Starts With			
Account Rule Name	Account Rule Integration Id	Description	Sales Force Name	Sales Force Integration Id	Region Name
1 ANS Rule	F8H5751292HVO3KSP		Diabetes Sales	10000000087424	US

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.

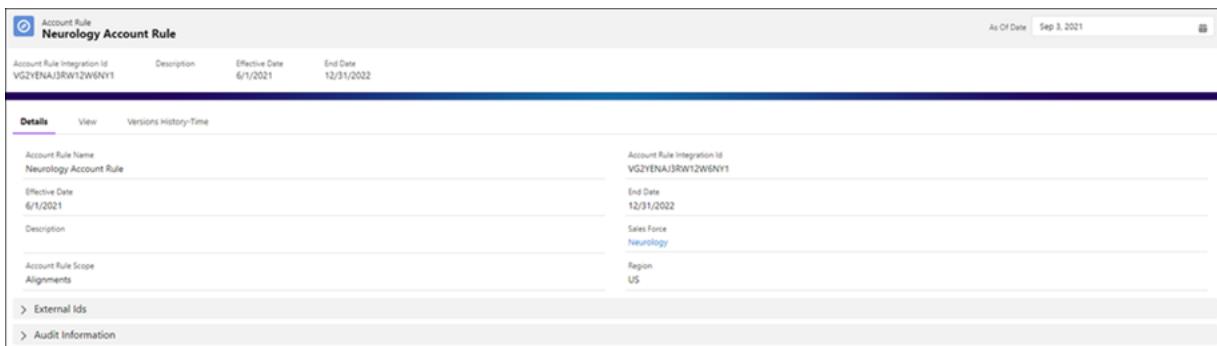
As Of Date: The data displayed for the rule is based on the date selected in this field.



Highlight Section



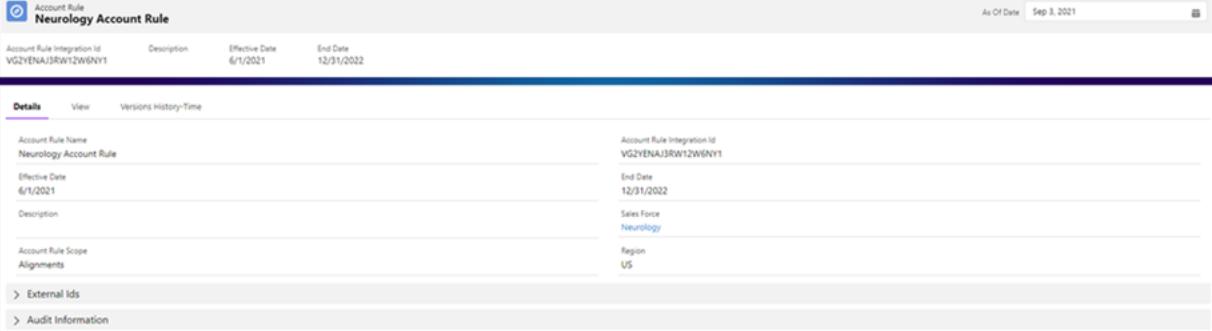
- **Account Rule Name:** Name of the rule.
- **Account Rule Integration ID:** Unique identification number of the rule.
- **Description:** Details of the rule.
- **Effective Date:** Indicates the date when the rule is active/valid.
- **End Date:** Indicates the date after which the rule is no longer 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.

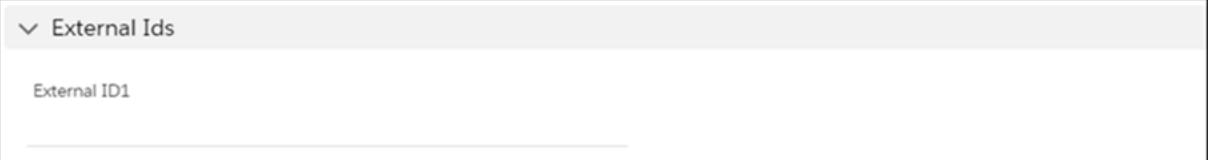
General Information



The screenshot shows a software interface for managing account rules. At the top, there's a header bar with the title "Account Rule" and a sub-header "Neurology Account Rule". On the right side of the header, it says "As Of Date Sep 3, 2021". Below the header, there's a table with columns: "Account Rule Integration Id" (VG2YENAJ3RW12W6NY1), "Description" (empty), "Effective Date" (6/1/2021), and "End Date" (12/31/2022). Below the table, there are tabs for "Details", "View", and "Versions History-Time". Under the "Details" tab, there are several sections: "Account Rule Name" (Neurology Account Rule), "Effective Date" (6/1/2021), "Description" (empty), "Account Rule Scope Alignments" (empty), "Sales Force" (Neurology), and "Region" (US). There are also sections for "External Ids" and "Audit Information" which are currently collapsed.

- **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.

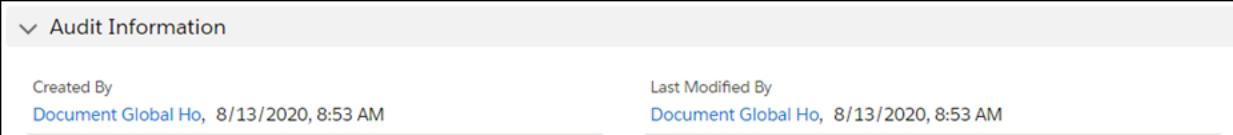
External IDs



This screenshot shows the "External IDs" section of the account rule details. It features a single expandable item labeled "External Ids" which contains the value "External ID1".

- **External ID1:** An additional identification number for cross referencing.

Audit Information



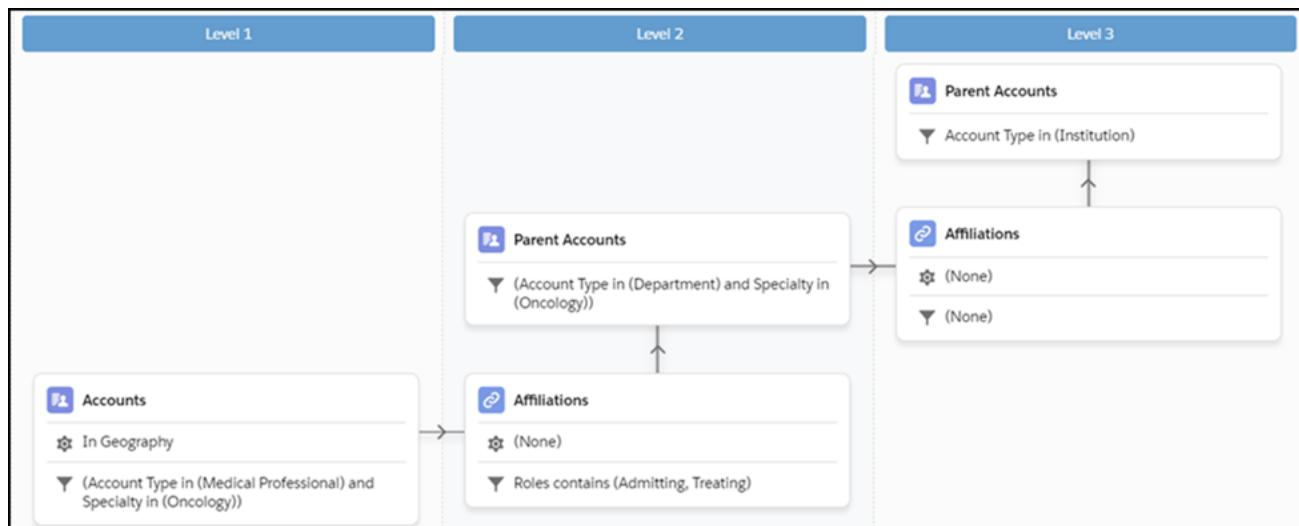
This screenshot shows the "Audit Information" section. It includes two expandable items: "Created By" and "Last Modified By". Both items show the same information: "Document Global Ho, 8/13/2020, 8:53 AM".

- **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

Rule Versions						
Version Number	Rule Version Name	Description	Account Territory Limited to Region	Effective Date	End Date	Export
1	Alignment Rule A			12/8/2020		
1 Records						
View All						

- **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.

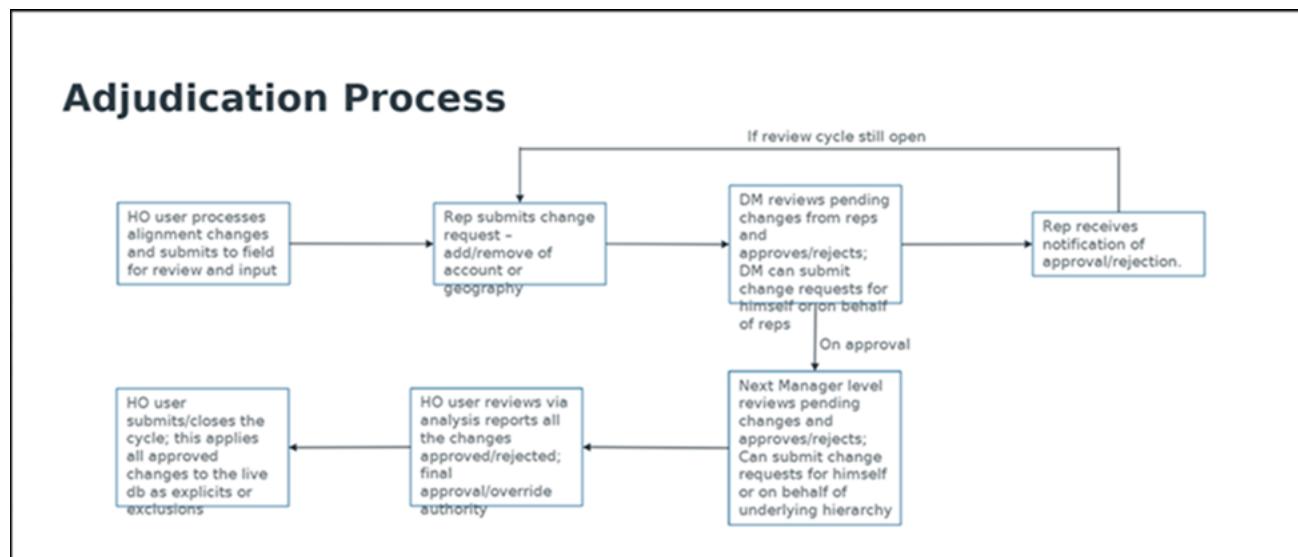
Reps and Managers have access to their account and geography alignments for the HO user-released adjudication cycle. They can provide feedback via Maps or through the tabs in the Adjudications module.

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 \(HO Users\)](#)

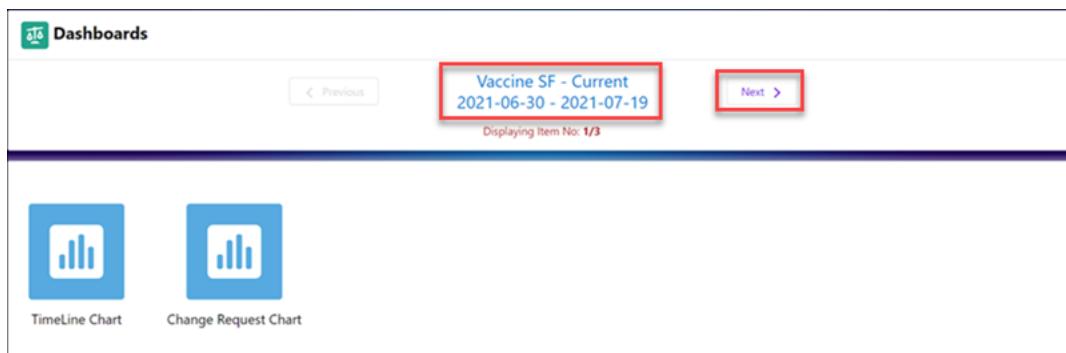
Access **Adjudications** to view current and future adjudication cycles.

Note: Depending on your access level, you might only be able to view current adjudications.

To view an adjudication

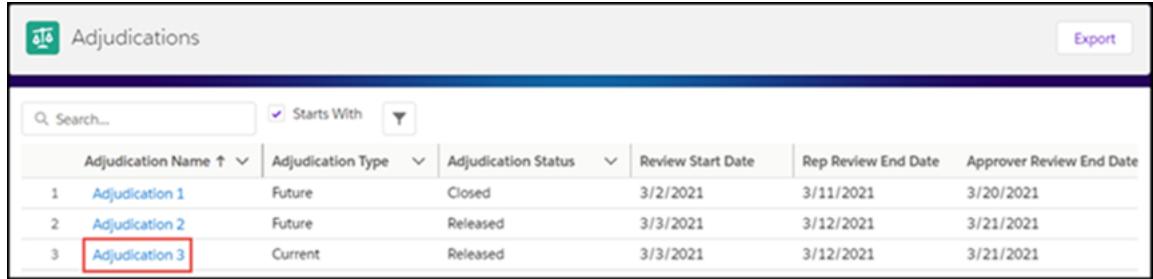
1. Do one of the following:

- 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](#).



	Adjudication Name	Adjudication Type	Adjudication Status	Review Start Date	Rep Review End Date	Approver Review End Date
1	Adjudication 1	Future	Closed	3/2/2021	3/11/2021	3/20/2021
2	Adjudication 2	Future	Released	3/3/2021	3/12/2021	3/21/2021
3	Adjudication 3	Current	Released	3/3/2021	3/12/2021	3/21/2021

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 AUG Vaccine Adjudication			
Adjudication Type Current	Adjudication Status Pending	Review Start Date 6/21/2021	Review End Date 7/10/2021
Edit Delete Release for Review Discard & Close			

- **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 Demo-Adjudication			
Adjudication Type Current	Adjudication Status Pending	Review Start Date 3/14/2022	Review End Date 4/2/2022
Edit Delete Release for Review Discard & Close			
Dashboards Details Change Requests			
Adjudication Name Demo-Adjudication	Adjudication Type Current		
Adjudication Scope Alignments	Engagement Plan Name		
Review Start Date 3/14/2022	Review End Date 4/2/2022		
Adjudication Effective Date	Adjudication End Date		
Adjudication Status Pending	Auto Apply On Manager Approval <input type="checkbox"/>		
Auto Approve Account CRs On Submit <input checked="" type="checkbox"/>	Auto Approve Geography CRs On Submit <input checked="" type="checkbox"/>		
Region Name United States	User Assignment Type Primary		

- **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	
Scenario	Scenario Integration Id
Scenario Effective Date 7/2/2021	Scenario End Date 12/31/2021
Last Simulated Date 7/2/2021, 11:48 AM	

- **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

Audit Information	
Created By Aditi Kapoor , 2/24/2021, 8:44 AM	Last Modified By Aditi Kapoor , 2/24/2021, 8:44 AM

- **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

Actions and Review Periods				Export
Territory Type ↑	Response Days	Permitted Actions	Automatic Action	
1 Territory		10 Add;Delete;View		
2 District		10 Add;Delete;Approve;Reject;View	Reject	
2 of 2				
View All				

- **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 Participants		Export
Sales Force Name ↑	Sales Force Integration Id	
1 Institutional SF	TFD0109CD3OJ84UG0HS	
2 Vaccine SF	GLW3PV8X3OJ7E8RUII	
2 of 2		
View All		

- **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)	6TRFRN4V3PSIGR558I	Territory	Vaccine SF
3	Vaccine Accomack County (VA)	PZL40J043PSIYF7W95	Territory	Vaccine SF
4	Vaccine Ada County (ID)	4FB20S043PSIQKAPLG	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
Action	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Segment	Call Frequency	Account Address	CR Status	CR Approval Sta...
<input type="checkbox"/>	Vaccine New York Co...	OSR3ACBZ3PSVJ3V4...	Aaron Hupman	WUSM00245039	Medical Professional	Family medicine			ANNISTON AL 36207, LILBUR...	Pending	
<input type="checkbox"/>	Vaccine New York Co...	OSR3ACBZ3PSVJ3V4...	Aashish Patel	WUSM01011433	Medical Professional	Neurology	Gold	Face to Face 10 [12]	GREENVALE NY 11548, NEW...	Pending	
<input type="checkbox"/>	Vaccine New York Co...	OSR3ACBZ3PSVJ3V4...	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

Geography Change Requests												Add	Discard	Submit	Approve	Reject	Export
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...	PZH5C9V234A680LX05	POST-00000	1300008295676	Postal Code	00000	Unknown	ZZ	Submitted	Approved							
Add	Illinois - Diabetes Sa...	PZH5C9V234A680LX05	POST-00396	130011834511	Postal Code	00396	San Juan	PR	Submitted	Pending							
Add	Illinois - Diabetes Sa...	PZH5C9V234A680LX05	POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	Submitted	Pending							
Add	Illinois - Diabetes Sa...	PZH5C9V234A680LX05	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.

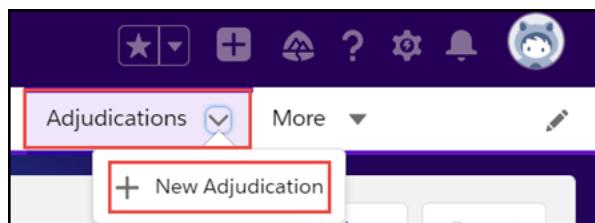
Create a New Adjudication

Adjudications are created by HO users.

To create an adjudication

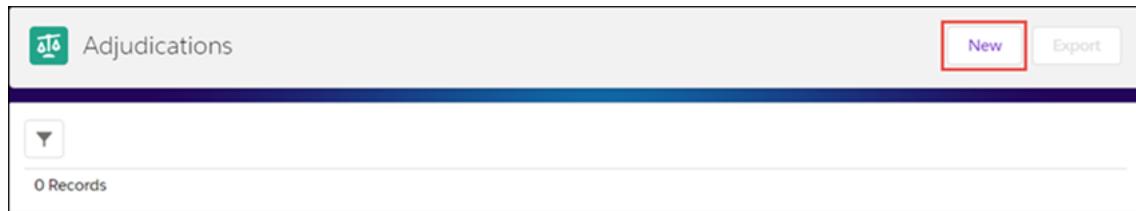
1. Do one of the following:

- 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**.

The screenshot shows the 'Add Adjudication' interface. The 'Details' tab is active. In the 'Information' section, 'Adjudication Name' is set to 'Demo-Adjudication'. 'Adjudication Scope' is set to 'Alignments'. 'Review Start Date' is 'Mar 14, 2022'. 'Adjudication Effective Date' is present but not filled. 'Adjudication Status' is 'Pending'. Under 'Region', 'United States' is selected. 'Adjudication Type' is 'Current'. 'User Assignment Type' is 'Primary'. Other sections like 'Actions and Review Periods', 'Guard Rails', 'Select Participants', 'Select Additional Regions', and 'Summary' are visible but not filled.

- **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**.

The screenshot shows the 'Add Adjudication' wizard with the following details:

- Review Start Date:** 10/18/2021
- Review End Date:** 11/6/2021

Hierarchy Level	Review Period	Review Dates	Allowed Action	Auto-Action for Manager
Territory	10 days	10/18/2021-10/27/2021	Select an Option	
District	10 days	10/18/2021-11/6/2021	Select an Option	Select an Option

At the bottom right, the 'Next' button is highlighted with a red box.

- **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*.

The screenshot shows the 'Add Adjudication' interface. At the top, a navigation bar includes 'Add Adjudication', 'Guard Rails' (highlighted in purple), 'Select Participants', 'Select Additional Regions', and 'Summary'. Below the navigation is a section titled 'Enter guard rails and warning limits'. It contains two main tables: one for 'Max Account Change' and one for 'Max Geography Change' at 'Territory' and 'District' levels. Each table has columns for 'Hierarchy Level', 'Non-action Warning #1', and 'Non-action Warning #2', each with an 'Enter days' input field and a note '(days prior to review period end)'. At the bottom right are 'Previous' and 'Next' buttons, with 'Next' highlighted in red.

- **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

Sales Forces Territories

Sales Force Name ↑	Sales Force Integration Id	Sales Force Type	Region Name	Effective Date	End Date
Institutional SF	TFD09C030J84U0GHS	Institutional	US	5/1/2021	
MSL	Y4ZKDNK230J890GTHL	Retail	US	5/1/2021	
Neurology	PSTOAP2U30JDAP4UQH	Institutional	US	5/1/2021	
Neurology Institutional	KBYWJLFS30JDKKEMU1	Institutional	US	5/1/2021	
Neurology Primary Care	79JL0FGM30J0DGGRU1	Retail	US	5/1/2021	
Orthopedics	K3IK8VB030JF55892X	Institutional	US	5/1/2021	
Vaccine SF	GLW3PVBX30JTE8RU1	Retail	US	5/1/2021	

Previous Next

Add Adjudication

Select participants

Sales Forces **Territories**

Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name	Region Name	Effective Date	End Date
MSL Alabama	6CZV1T2K3Q0LM57BL5	District	MSL		US	5/1/2021	
MSL Alaska	J7F48E5ES3Q0LM57GAY	District	MSL		US	5/1/2021	
MSL Arizona	0XV8VDE23Q0LM5700R	District	MSL	Bert Huff	US	5/1/2021	
MSL Arkansas	06P1ZCF9JQ0LM5700S	District	MSL		US	5/1/2021	
MSL California	HUBZD3Q0LM58930	District	MSL	Clara Bowers	US	5/1/2021	
MSL Colorado	MIM7TW2X3Q0LM583G	District	MSL		US	5/1/2021	
MSL Connecticut	FTLXRP9JQ0LM58866	District	MSL		US	5/1/2021	
MSL DIST of Columbia	5XMC7F3FQ0LM58V2	District	MSL		US	5/1/2021	
MSL Delaware	IIBYXKQKQ0LM58WV	District	MSL		US	5/1/2021	
MSL Florida	LV2L6RMC3Q0LM58YBP	District	MSL		US	5/1/2021	
MSL Georgia	2E2ZOKWKE3Q0LM5961I	District	MSL		US	5/1/2021	
MSL Hawaii	40B3385R3Q0LM5961J	District	MSL		US	5/1/2021	
MSL Idaho	GKBNEPB1Q0LM590RC	District	MSL		US	5/1/2021	
MSL Illinois	OV1HUUMM53Q0LM59LH5	District	MSL		US	5/1/2021	
MSL Indiana	EV6WY0403Q0LM59LH6	District	MSL	Debbie Wheeler	US	5/1/2021	
MSL Iowa	QW9774L43Q0LM5976Z	District	MSL		US	5/1/2021	
MSL Kansas	35Z5ZI0V3Q0LM5A0WS	District	MSL		US	5/1/2021	

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**.

Add Adjudication

Select additional regions

Q. Search... Starts With

Region Name	Region Integration Id	Country	Effective Date	End Date
US	100002000000107	United States	1/5/2019	

1 of 1 (1 selected)

Previous Next

7. Review the information you added to the adjudication using the tabs highlighted on the screen below, then click **Save**.

Add Adjudication

Summary

Information

Adjudication Name: Demo-Adjudication

Adjudication Type: Current

Engagement Plan Name:

Adjudication Scope Alignments:

Adjudication Effective Date:

Adjudication End Date:

Adjudication Status: Pending

Auto Approve Account CRs On Submit:

Auto Approve Geography CRs On Submit:

Actions Sales Force Participants (2) Territory Participants (2) Guard Rails Regions (4)

Previous 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.

Adjudication Name	Adjudication Type	Adjudication Status	Review Start Date	Review End Date	Scenario Name	Scenario Integration
1 adjudication test	Current	Pending	6/30/2021	7/19/2021		
2 adjudication 10	Current	Pending	6/30/2021	7/19/2021		
3 current cycle	Current	Pending	6/30/2021	7/19/2021		

2. Click Release for Review.

Adjudication
adjudication 10

Adjudication Type Current	Adjudication Status Pending	Review Start Date 6/30/2021	Review End Date 7/19/2021
------------------------------	--------------------------------	--------------------------------	------------------------------

Dashboards Details Change Requests

TimeLine Chart

Change Requests Status
0 Records

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.

Adjudication Name	Adjudication Type	Adjudication Status	Review Start Date	Review End Date	Scenario Name	Scenario Integration
1 Vaccine Feb	Current	Pending	7/12/2021	7/31/2021		
2 New York Q3 2021 Adjudica	Current	Pending	7/13/2021	8/1/2021		
3 Vaccine July	Current	Released	7/2/2021	7/21/2021		
4 Adjudication 5	Current	Released	7/2/2021	8/5/2021		
5 Vaccine December	Current	Released	7/6/2021	7/28/2021		
6 Q3 2021 Adjudication	Current	Released	7/9/2021	7/28/2021		
7 Vaccine SF Q3 Engagement	Future	Released	7/12/2021	8/10/2021		
8 PC SF Q3 Engagement Plan	Future	Released	7/12/2021	8/10/2021	PC SF Engagement Plan Cyc	GJ6MWKNT48P0A7NHUH

2. Click the Change Requests tab.

Action	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Address
Add	Vaccine New York Count	OSR34CBZ3PSIV3V4...	1 World Medicine	WUSE00421772	Practice	Internal medicine - fa...	LAS VEGAS NV 8911C
Add	Vaccine New York Count	OSR34CBZ3PSIV3V4...	10th Street Comprehensi	WUSE00677376	Practice	Addiction medicine	MILWAUKEE WI 532...
	Vaccine New York Count	OSR34CBZ3PSIV3V4...	Medical Clinic	WUSE000000705	Practice	Obstetrics	SCOTTSDALE AZ 852...

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.

Date/Time	User	Action
6/14/2021, 9:23 AM	User User	Approved
6/7/2021, 4:52 PM	Marcus Cannon	Submitted
6/7/2021, 4:52 PM	Marcus Cannon	Created

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.

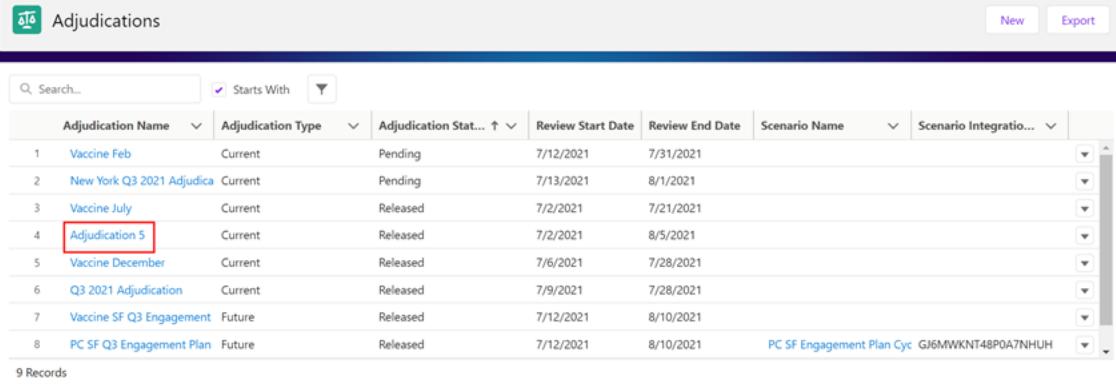
The changes are accepted and the adjudication status changes to *Closed* and is read-only.

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

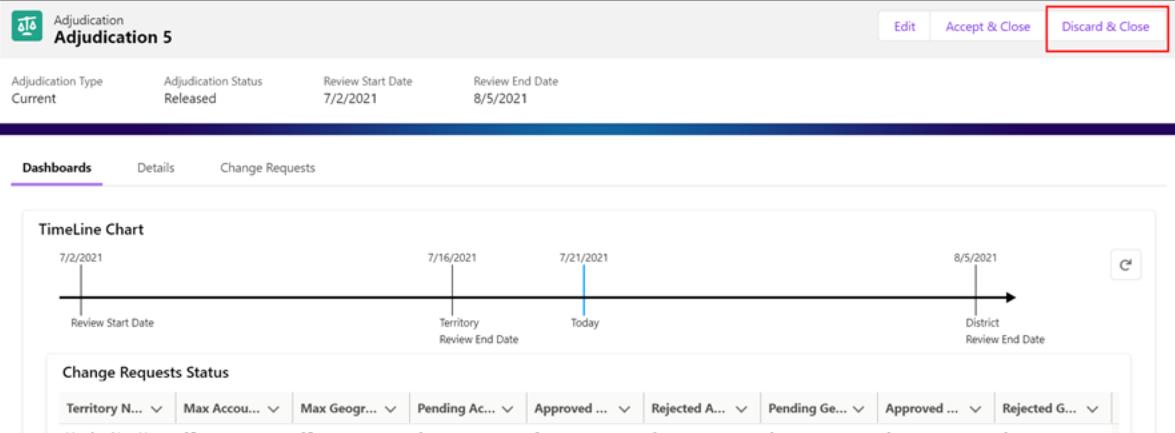
1. Open the adjudication.



The screenshot shows a table of adjudication records. The columns include Adjudication Name, Adjudication Type, Adjudication Status, Review Start Date, Review End Date, Scenario Name, and Scenario Integration ID. The record 'Adjudication 5' is selected and highlighted with a red box.

Adjudication Name	Adjudication Type	Adjudication Status	Review Start Date	Review End Date	Scenario Name	Scenario Integration ID
Vaccine Feb	Current	Pending	7/12/2021	7/31/2021		
New York Q3 2021 Adjudica	Current	Pending	7/13/2021	8/1/2021		
Vaccine July	Current	Released	7/2/2021	7/21/2021		
Adjudication 5	Current	Released	7/2/2021	8/5/2021		
Vaccine December	Current	Released	7/6/2021	7/28/2021		
Q3 2021 Adjudication	Current	Released	7/9/2021	7/28/2021		
Vaccine SF Q3 Engagement	Future	Released	7/12/2021	8/10/2021		
PC SF Q3 Engagement Plan	Future	Released	7/12/2021	8/10/2021	PC SF Engagement Plan Cyc	GJ6MWKNT48P0A7NHUH

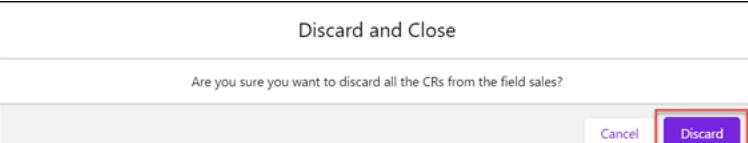
2. Click Discard & Close.



The screenshot shows the details of the selected adjudication. It includes fields for Adjudication Type (Current), Adjudication Status (Released), Review Start Date (7/2/2021), and Review End Date (8/5/2021). Below this, there are tabs for Dashboards, Details, and Change Requests. The Change Requests section contains a Timeline Chart showing the progression from Review Start Date to District Review End Date. At the bottom, a table provides a summary of change request status by territory and account.

Territory N...	Max Accou...	Max Geogr...	Pending Ac...	Approved ...	Rejected A...	Pending Ge...	Approved ...	Rejected G...
Vaccine New Yor...	25	25	0	3	0	0	0	0

3. Click Discard.



A confirmation dialog box titled 'Discard and Close' asks if the user is sure they want to discard all change requests. The 'Discard' button is highlighted with a red box.

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

- From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.

The screenshot shows the 'Dashboards' page with the title 'Vaccine SF Q3 Engagement Plan Cycle 2021-07-12 - 2021-08-10'. Below the title are three chart icons: 'TimeLine Chart', 'Impact Analysis Chart', and 'Change Request Chart'. The 'TimeLine Chart' icon is highlighted with a red box.

- Click **TimeLine Chart**.

The screenshot shows the 'Dashboards' page with the same title and chart options. The 'TimeLine Chart' icon is now highlighted with a red box.

- View the milestone dates and change requests status.

The screenshot shows the 'Timeline Chart' and 'Change Requests Status' sections. The timeline shows dates: 11/29/2021 (Review Start Date), 12/8/2021 (Territory Review End Date), Today (Today), and 12/18/2021 (District Review End Date). The 'Change Requests Status' table shows the following data:

Territory Name	Max Account CRs Allo...	Max Geography CRs Al...	Pending Account CRs	Approved Account CRs	Rejected Account CRs	Pending Geography CRs	Approved Geography ...	Rejected Geography CRs
Vaccine New York County (NY)	15%	15%	1	1	0	2	0	0

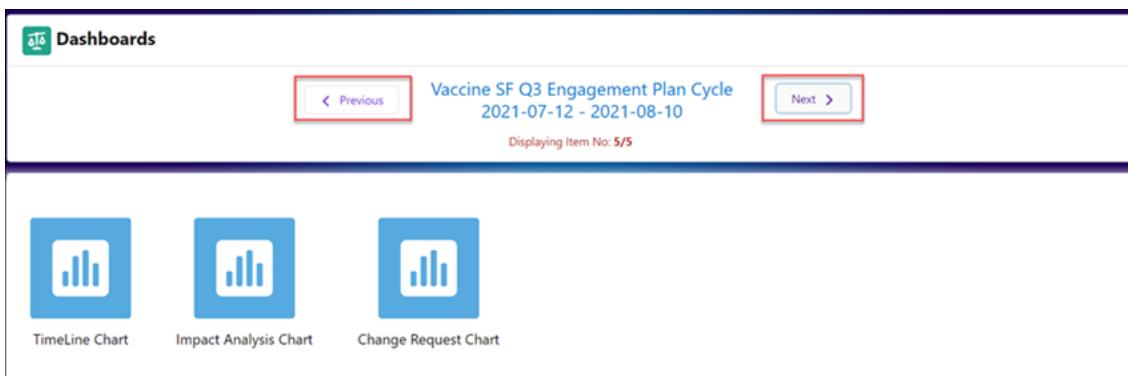
1 Records

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.

The screenshot shows a software interface titled 'Approved Account CRs'. At the top, there is a toolbar with buttons for 'Search...', 'Starts With', 'New Add CR', 'New Delete CR', 'Discard', 'Submit', 'Approve', 'Reject', and 'Export'. Below the toolbar is a header row with columns: Action, Territory Name, Territory Integr..., Account Name, Account Integr..., Account Type, Account Specialty, and Account Address. A single row of data is displayed: Action (Add), Territory Name (Vaccine New York Co...), Territory Integr... (OSR34C8Z3PSIV3V4...), Account Name (1488 Family Medicine Gr...), Account Integr... (WU5E00671754), Account Type (Practice), Account Specialty (Family medicine), and Account Address (CONROE TX 77384). At the bottom of the window, it says '1 of 1' and has a 'Close' button.

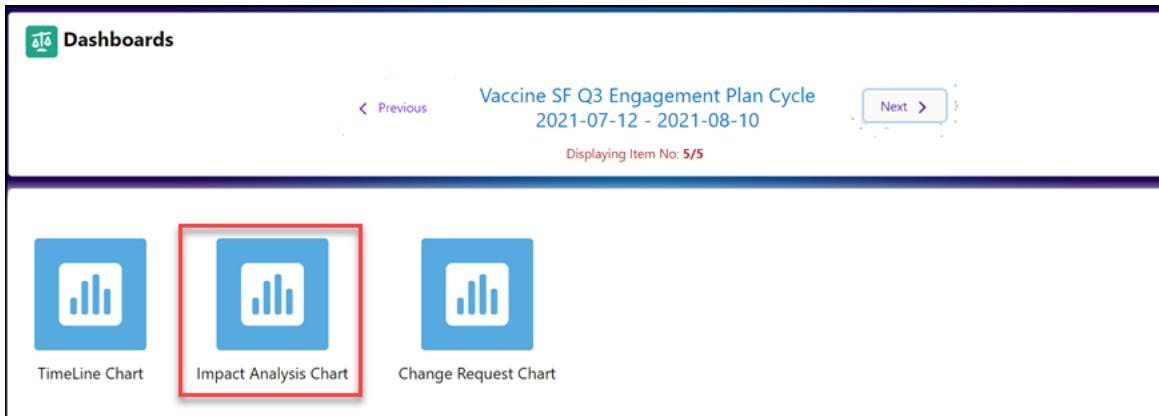
To view the Impact Analysis Chart

1. From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.

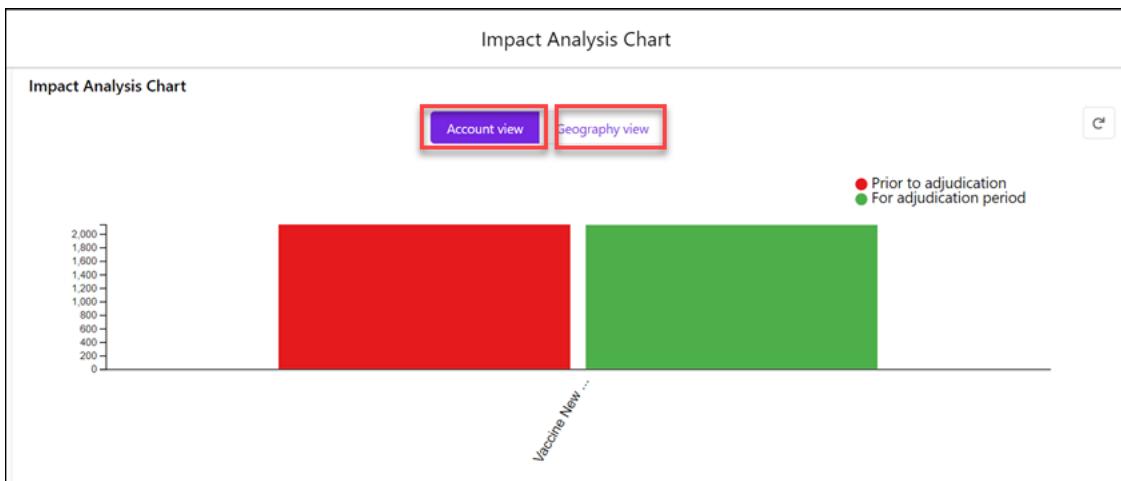


Note: The Impact Analysis Chart only appears for adjudications with *Future* as the Adjudication Type.

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.

The screenshot shows a table titled "Current Accounts" with the following data:

	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Address
1	New PC Terr 2	GE307AMY47V76A7...	Aaron Miller	WUSM00261356	Medical Professional	Neurology	BRONX NY 10467, I
2	New PC Terr 2	GE307AMY47V76A7...	Abhinav Changa	WUSM02368984	Medical Professional	Neurology	NEW YORK NY 100
3	New PC Terr 2	GE307AMY47V76A7...	Abigail Levy	WUSM03828676	Medical Professional	Neurology	NEW YORK NY 100
4	New PC Terr 2	GE307AMY47V76A7...	Adam Karp	WUSM03902403	Medical Professional	Neurology	FOREST HILLS NY 1
5	New PC Terr 2	GE307AMY47V76A7...	Adam Szerencsy	WUSM00784799	Medical Professional	Family medicine	BRONX NY 10461, I
6	New PC Terr 2	GE307AMY47V76A7...	Adelene Jann	WUSM00948726	Medical Professional	Neurology	NEW YORK NY 100
7	New PC Terr 2	GE307AMY47V76A7...	Adilia Hormigo	WUSM00805919	Medical Professional	Neurology	NEW YORK NY 100
8	New PC Terr 2	GE307AMY47V76A7...	Afnan Haq	WUSM02354367	Medical Professional	Family medicine	BROOKLYN NY 112
9	New PC Terr 2	GE307AMY47V76A7...	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							
	Action	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty
1	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community	WUSE00626674	Department	Other specialty
2	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community	WUSE00626674	Department	Other specialty
3	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community	WUSE00626682	Practice	Other specialty
4	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community	WUSE00626682	Practice	Other specialty

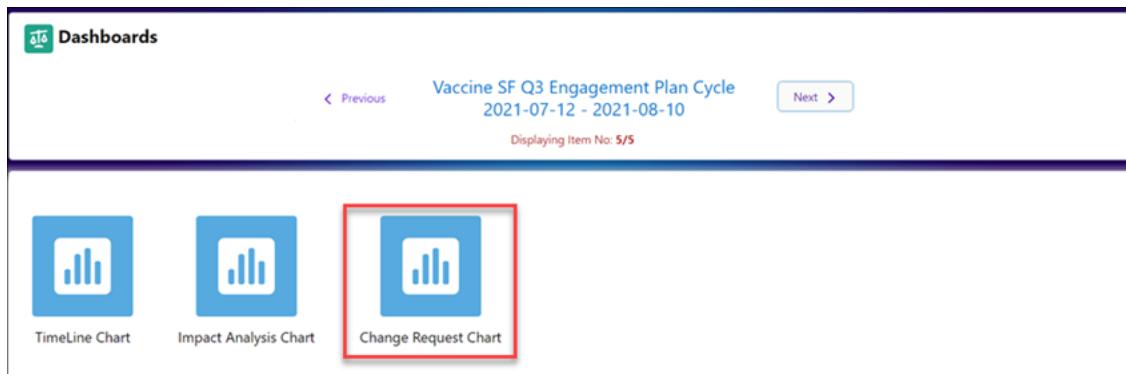
10+ Records

[View All](#)

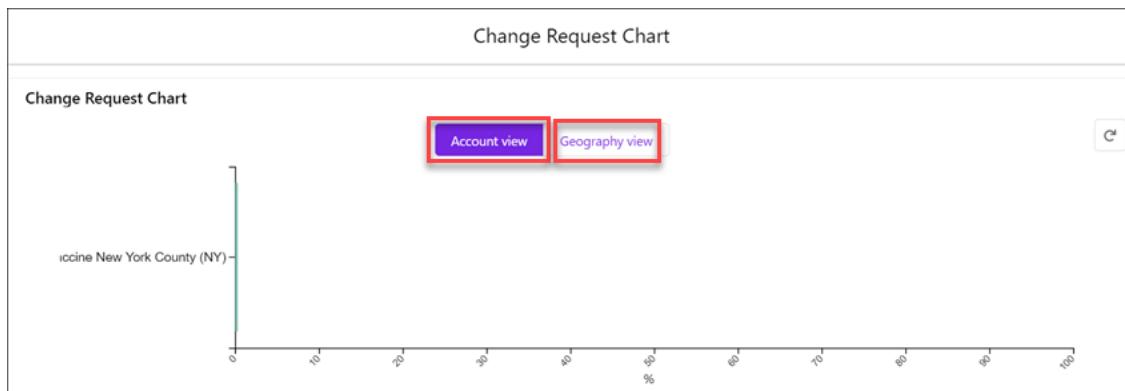
To view the Change Request Chart

1. From the Dashboards tab, click **Previous** or **Next** until you find the adjudication you would like to view.

2. Click **Change Request Chart** .

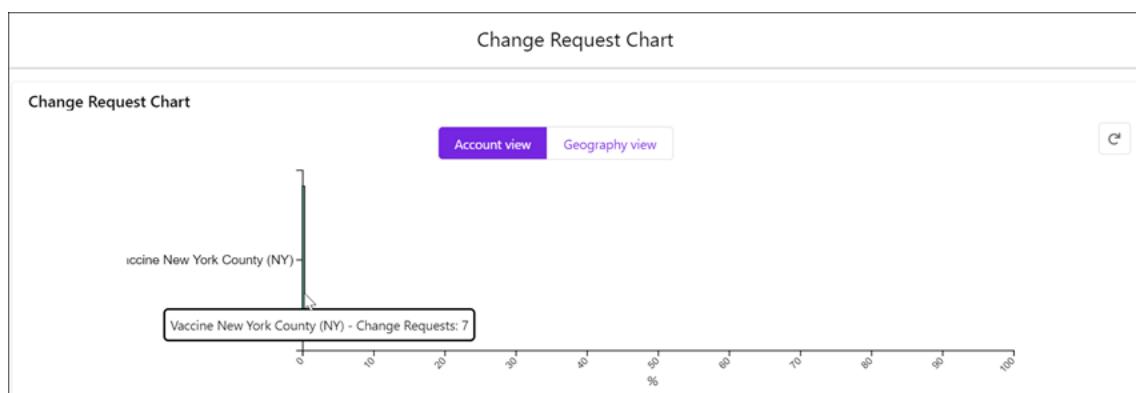


3. Click **Account view** to display account information or **Geography view** to display geography information.



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.

Account Change Requests								Export	
Account Change Requests									
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With <input type="button"/>		Action	Territory Name ↑ ↓	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account A
<input type="checkbox"/>	Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	1 Community Medical Cli	WUSE00091052	Department	Other specialty	BALDWIN I	
<input type="checkbox"/>	Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	1 World Medicine	WUSE00421772	Practice	Internal medicine - fa...	LAS VEGAS	
<input type="checkbox"/>	Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	10th Street Comprehensi	WUSE00677376	Practice	Addiction medicine	MILWAUKE	
<input type="checkbox"/>	Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	1488 Family Medicine Gr	WUSE00671754	Practice	Family medicine	CONROE T	

5 Records [View All](#)

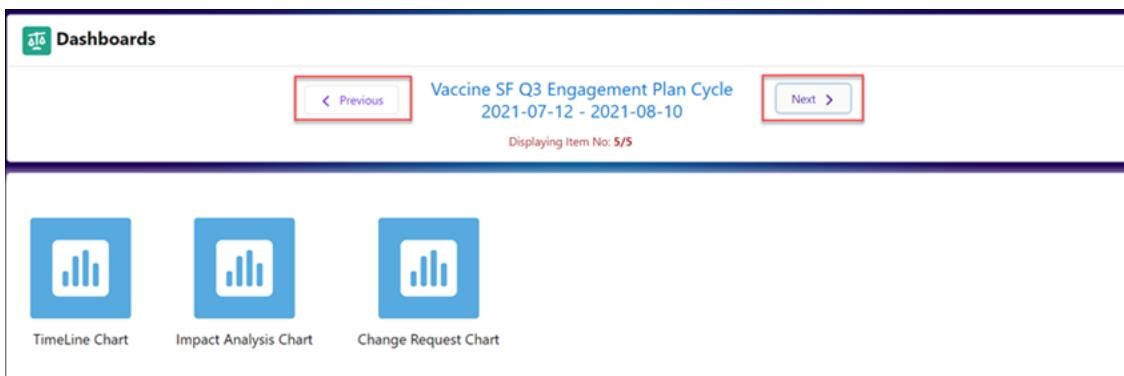
District Manager Dashboard

The **Dashboard** tab contains up to three sections:

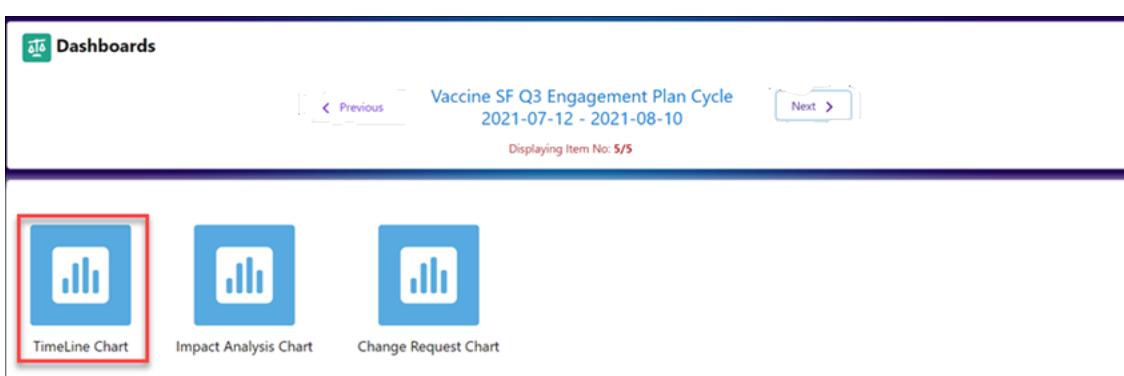
- The **TimeLine Chart** includes a graph of milestone dates of the adjudication, as well as a Change Requests Status grid that provides a quick view of the status of the change requests for your assigned territories.
- The **Impact Analysis Chart** displays an analysis of the contents of an adjudication 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

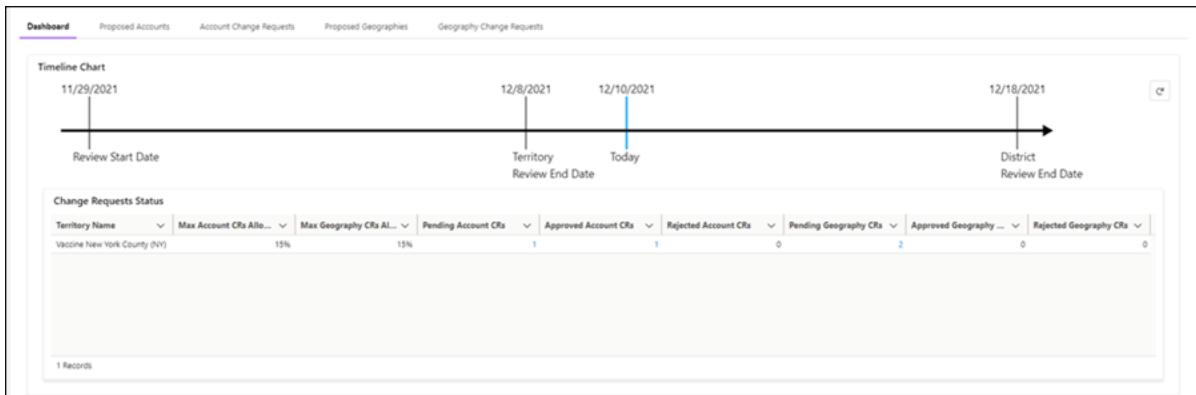
1. From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.



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.

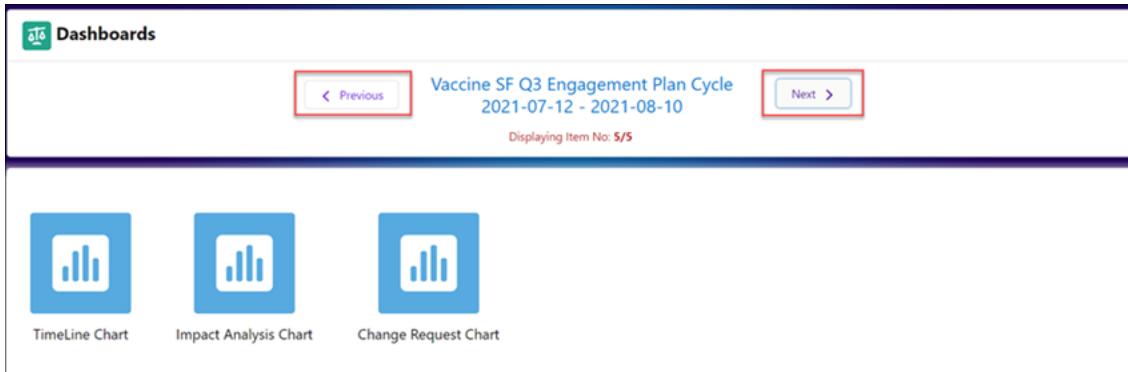
This screenshot shows a modal window titled 'Approved Account CRs'. The window has a header bar with buttons for 'Search...', 'Starts With', 'New Add CR', 'New Delete CR', 'Discard', 'Submit', 'Approve', 'Reject', and 'Export'. Below the header is a search/filter bar with dropdowns for 'Action', 'Territory Name' (sorted by territory name), 'Territory Integr...', 'Account Name', 'Account Integr...', 'Account Type', 'Account Specialty', and 'Account Address'. There is also an 'Add' button. The main content area displays a single record:

Action	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Address
	Vaccine New York Co...	OSR34CE23P5V3V4...	1488 Family Medicine On...	WU5E00671754	Practice	Family medicine	CONROE TX 77384

At the bottom of the window, it says '1 of 1' and has a 'Close' button.

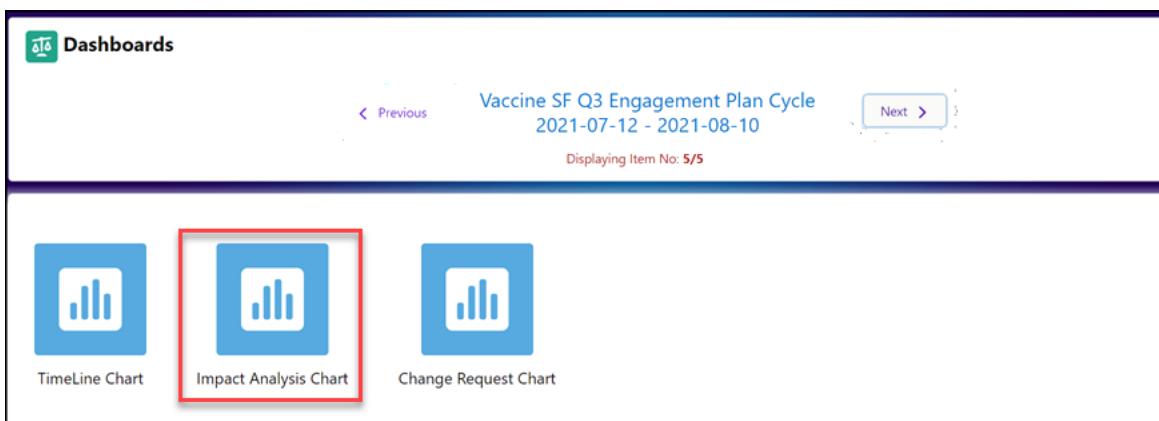
To view the Impact Analysis Chart

1. From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.

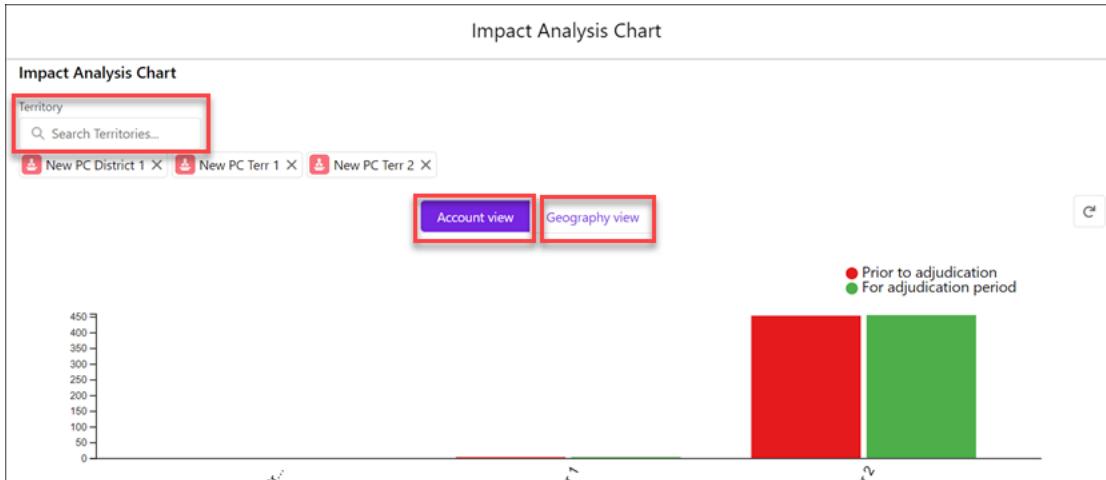


Note: The **Impact Analysis Chart** only appears for adjudications with *Future* as the Adjudication Type.

2. Click **Impact Analysis Chart** .

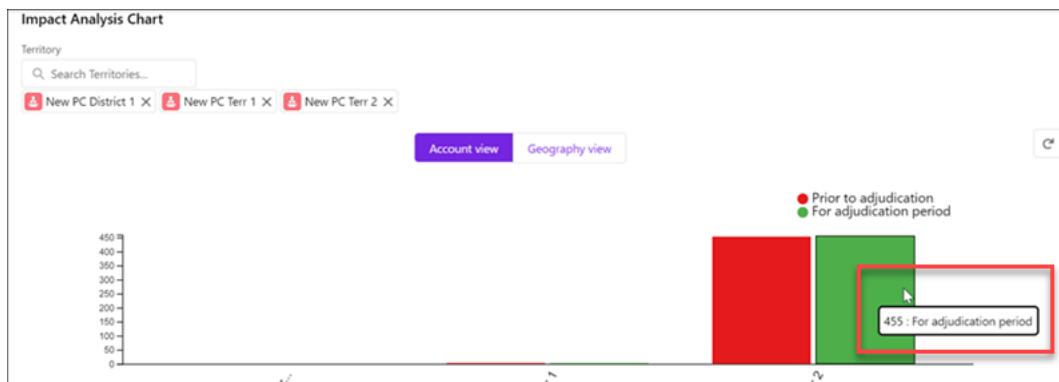


3. Search for territories using the **Territory** search box, and select **Account view** to display account information or **Geography view** to display geography information.



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							
	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 10461, 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							
	Action	Territory Name ↑	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty
1	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community ↗	WUSE00626674	Department	Other specialty
2	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community ↗	WUSE00626674	Department	Other specialty
3	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community ↗	WUSE00626682	Practice	Other specialty
4	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community ↗	WUSE00626682	Practice	Other specialty
10+ Records							
View All							

To view the Change Request Chart

- From the **Dashboards** tab, click **Previous** or **Next** until you find the adjudication you would like to view.

The screenshot shows the 'Dashboards' tab interface. At the top, there are navigation buttons for 'Previous' and 'Next', and a title 'Vaccine SF Q3 Engagement Plan Cycle 2021-07-12 - 2021-08-10'. Below the title, it says 'Displaying Item No: 5/5'. There are three blue square icons representing different charts: 'TimeLine Chart', 'Impact Analysis Chart', and 'Change Request Chart'. The 'Change Request Chart' icon is highlighted with a red box.

- Click **Change Request Chart**.

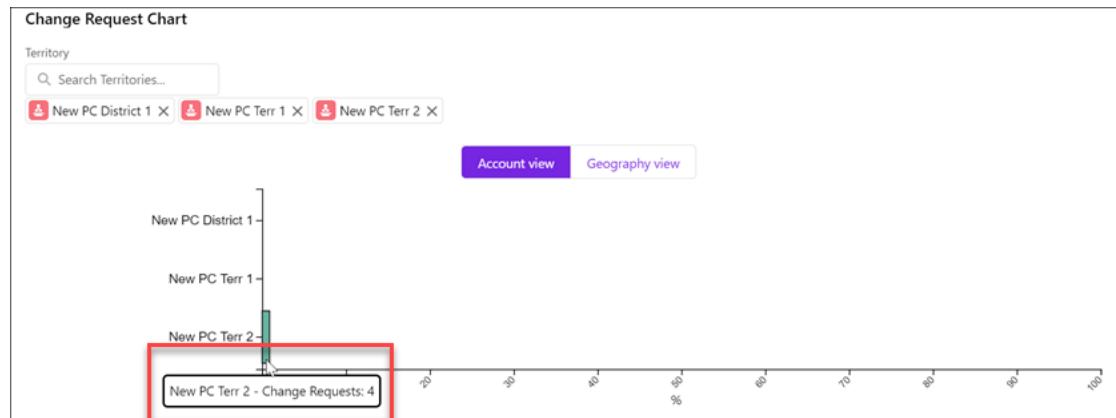
This screenshot is identical to the one above, showing the 'Dashboards' tab. The 'Change Request Chart' icon is now explicitly highlighted with a red box around its entire square frame.

- Search for territories using the **Territory** search box and select **Account view** to display account information or **Geography view** to display geography information.

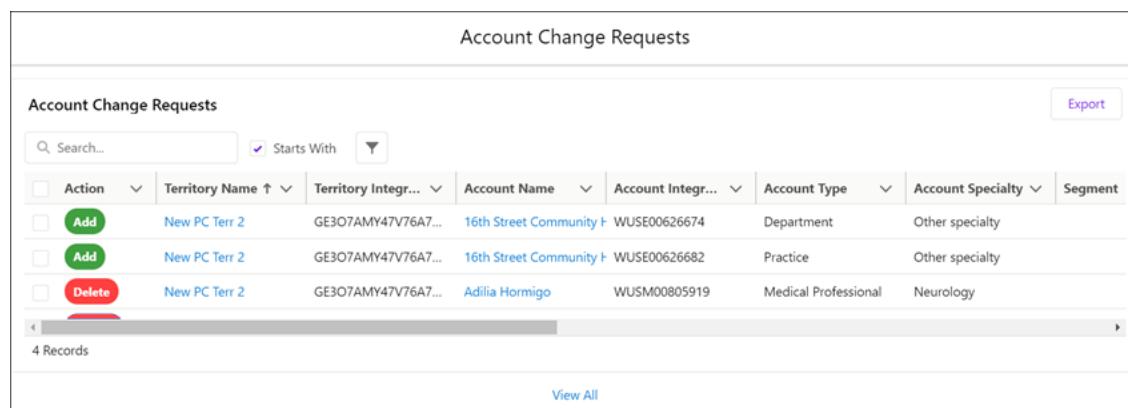
The screenshot shows the 'Change Request Chart' interface. At the top, it says 'Change Request Chart'. Below that is a section titled 'Change Request Chart' with a 'Territory' label and a search bar containing 'Search Territories...'. Underneath the search bar are three items: 'New PC District 1 X', 'New PC Terr 1 X', and 'New PC Terr 2 X'. To the right of these items are two buttons: 'Account view' (highlighted with a red box) and 'Geography view'. Below these buttons is a chart area showing vertical bars for 'New PC District 1', 'New PC Terr 1', and 'New PC Terr 2'. The x-axis has numerical values from 0 to 100.

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)

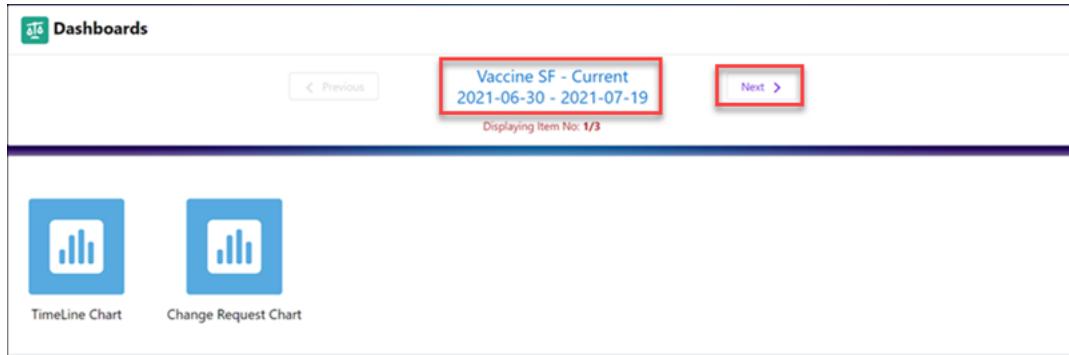
Access **Adjudications** to view current or future adjudication cycles.

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](#).

Adjudications						Export			
	Q. Search...	<input checked="" type="checkbox"/> Starts With		Adjudication Name ↑	Adjudication Type	Adjudication Status	Review Start Date	Rep Review End Date	Approver Review End Date
1	Adjudication 1	Future	Closed	3/2/2021	3/11/2021	3/20/2021			
2	Adjudication 2	Future	Released	3/3/2021	3/12/2021	3/21/2021			
3	Adjudication 3	Current	Released	3/3/2021	3/12/2021	3/21/2021			

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 Adjudication 5						Simulate	Map
Adjudication Type	Adjudication Status	Review Start Date	Rep Review End Date	Approver Review End Date	Last Simulated Date	Simulation Status	
Current	Released	7/2/2021	7/16/2021	8/5/2021	7/9/2021, 12:12:19 PM	Simulation complete	

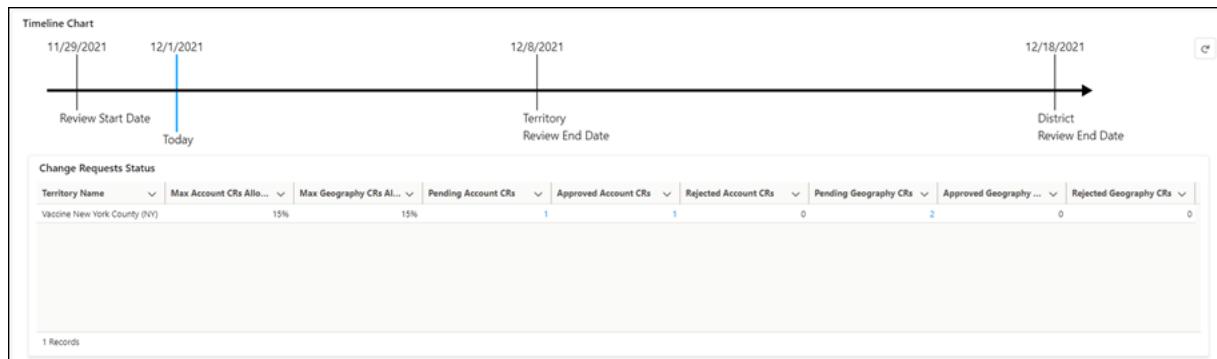
- **Adjudication Name:** Name of the adjudication.
- **Adjudication Type:** *Current or Future*.
- **Adjudication Status:** *Pending or Released*.
- **Review Start Date:** Indicates the date when the adjudication is submitted to the field for review and feedback.
- **Rep Review End Date:** Indicates 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

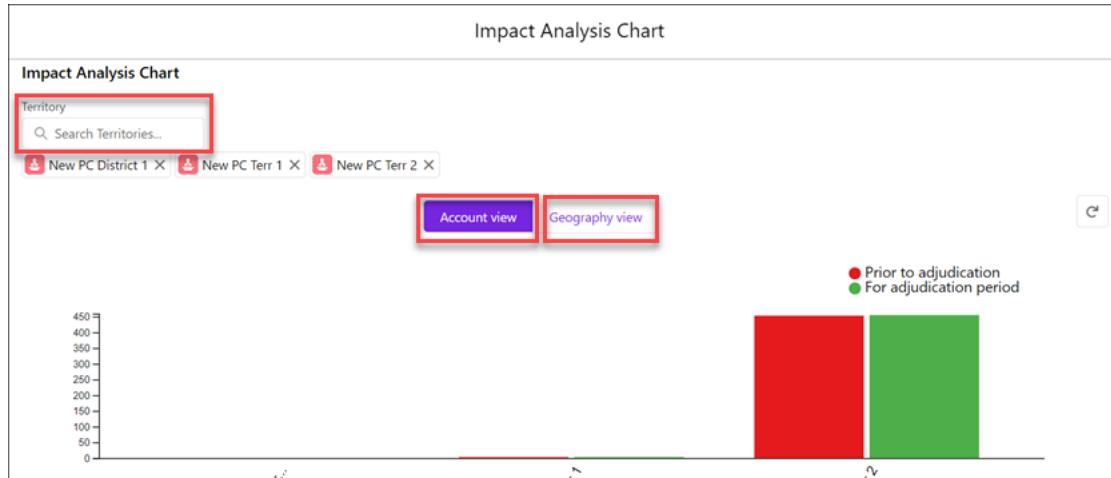
The Timeline Chart includes the milestone dates of the adjudication, as well as a quick view of the change requests statuses for your assigned territories.



Note: To view change request details, click on the count value in the **Change Requests Status** grid.

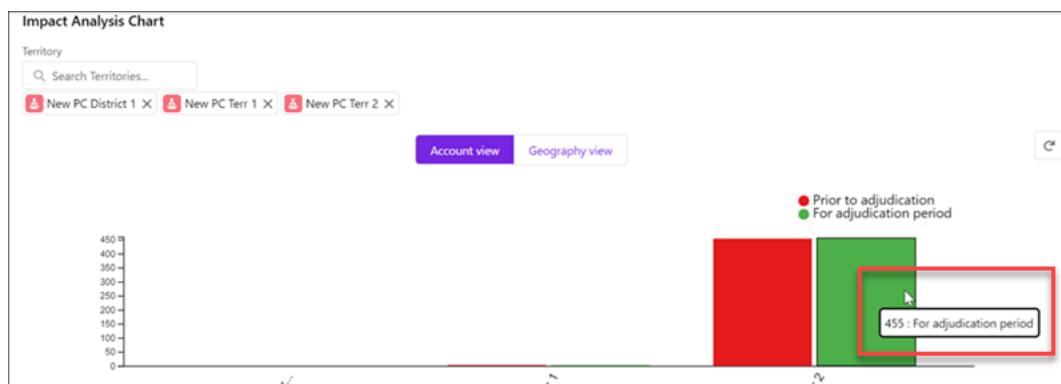
Impact Analysis Chart

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.

Prior to adjudication

Current Accounts

Starts With

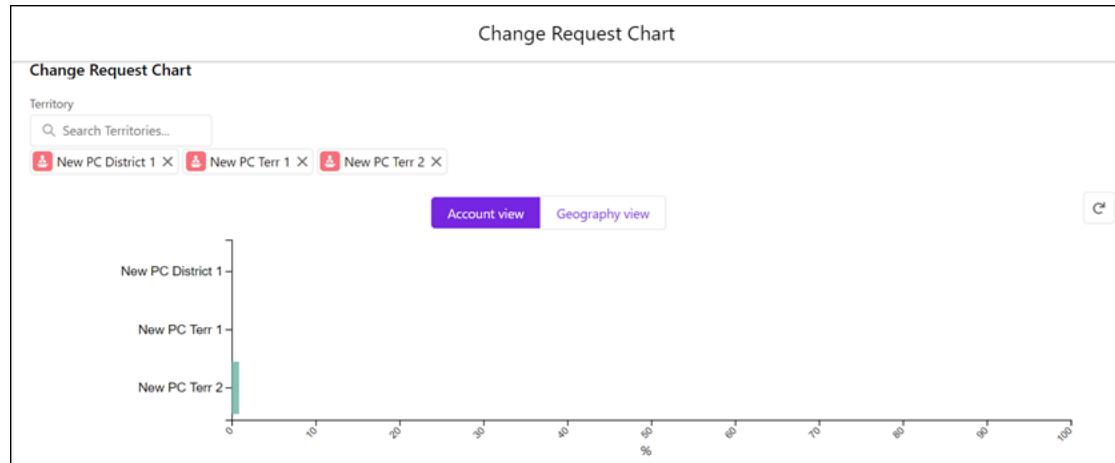
	Territory Name ↑ ↓	Territory Integr...	Account Name ↓	Account Integr...	Account Type ↓	Account Specialty ↓	Account Address
1	New PC Terr 2	GE3O7AMY47V76A7...	Aaron Miller	WUSM00261356	Medical Professional	Neurology	BRONX NY 10467, I
2	New PC Terr 2	GE3O7AMY47V76A7...	Abhinav Changa	WUSM02368984	Medical 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						
		Action	Territory Name ↑	Territory Integr...	Account Name	Account Integr...
1	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community ↗ WUSE00626674	Department	Other specialty
2	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community ↗ WUSE00626674	Department	Other specialty
3	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community ↗ WUSE00626682	Practice	Other specialty
4	Add	New PC Terr 2	GE3O7AMY47V76A7...	16th Street Community ↗ WUSE00626682	Practice	Other specialty

Change Request Chart

The Change Request Chart displays change request data for the adjudication.

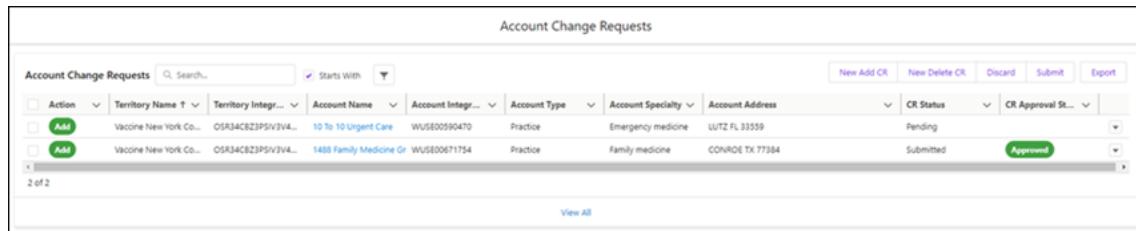


You can search for territories using the **Territory** search box. Select **Account view** to display account information or **Geography view** to display geography information.

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.

Proposed Accounts										
All Differences CR Impact										
Action	Territory Name	Territory Integration ID	Account Name	Account Integration ID	Account Type	Account Specialty	Account Address	Source		
Add	Vaccine New York County ...	05R34C8Z3PSV3V4MH	10 To 10 Urgent Care	WU5E000590470	Practice	Emergency medicine	LUTZ FL 33559	Explicit		
Add	Vaccine New York County ...	05R34C8Z3PSV3V4MH	1488 Family Medicine Group	WU5E000671754	Practice	Family medicine	CORROE TX 77384	Explicit		
	Vaccine New York County ...	05R34C8Z3PSV3V4MH	181st Street Urgent Care-Cent	WU5E000634100	Practice	Other specialty	NEW YORK NY 10033	Dynamic		
	Vaccine New York County ...	05R34C8Z3PSV3V4MH	21st Century Medical Center	WU5E000126760	Practice	Family medicine	BROOKLYN NY 11215, BROOKLYN NY 11219, BROOK...	Dynamic		
	Vaccine New York County ...	05R34C8Z3PSV3V4MH	43rd Street Family Practice, PLLC	WU5E00064771	Practice	Family medicine	FLUSHING NY 11355, NEW YORK NY 10034, SUNNY...	Dynamic		
	Vaccine New York County ...	05R34C8Z3PSV3V4MH	Aaron Hump...	WUSM000245019	Medical Professional	Family medicine	ANNISTON AL 36207, ULRBURN GA 30047, NEW YOR...	Dynamic		
	Vaccine New York County ...	05R34C8Z3PSV3V4MH	Aashish Dadarwala	WUSM000608909	Medical Professional	Family medicine	NEW YORK NY 10029, NEW YORK NY 10036	Dynamic		
	Vaccine New York County ...	05R34C8Z3PSV3V4MH	Alco Medical Center, LLC	WU5E00025807	Practice	Family medicine	LAKEWOOD OH 44107, WESTLAKE OH 44145	Dynamic		
	Vaccine New York County ...	05R34C8Z3PSV3V4MH	Abraham Hamacul	WUSM000378523	Medical Professional	Family medicine	BRONX NY 10451, BROOKLYN NY 11237, DELRAY BE...	Dynamic		

- **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 Delete indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color Delete 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	Change	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Address
<input type="checkbox"/>	Add	Vaccine New York Co...	OSR34CBZJP5V3V4...	10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine	LUTZ FL 33559
<input type="checkbox"/>	Add	Vaccine New York Co...	OSR34CBZJP5V3V4...	1488 Family Medicine Gr	WUSE00671754	Practice	Family medicine	CONROE TX 77384

- **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 Delete indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color Delete 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	Change	Territory Name	Account Name	Account Integration ID	Account Type	Account Specialty	
Add	CR Added	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine
Add	CR Added	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	1488 Family Medicine Gr	WUSE00671754	Practice	Family medicine

- **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.

Account Change Requests										
<input type="button" value="New Add CR"/> <input type="button" value="New Delete CR"/> <input type="button" value="Discard"/> <input type="button" value="Submit"/> <input type="button" value="Approve"/> <input type="button" value="Reject"/> <input type="button" value="Export"/>										
Action	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Address	CR Status	CR Approval St...	
<input type="button" value="Add"/>	Vaccine New York Co...	OSR34CE23PSIV3V4...	10 To 10 Urgent Care	WU5E00590470	Practice	Emergency medicine	LUTZ FL 33559	Pending	<input type="button" value="Approved"/>	<input type="button" value="Rejected"/>
<input type="button" value="Add"/>	Vaccine New York Co...	OSR34CE23PSIV3V4...	1488 Family Medicine Gr	WU5E00671754	Practice	Family medicine	CONROE TX 77384	Submitted	<input type="button" value="Approved"/>	<input type="button" value="Rejected"/>

- **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.

Proposed Geographies									Geography Change Requests									
All		Differences		CR Impact					New Add CR	New Delete CR	Add	Delete	Export					
<input type="checkbox"/>	Action	<input type="checkbox"/>	Territory Name	<input type="checkbox"/>	Territory Integration ID	<input type="checkbox"/>	Geography Name	<input type="checkbox"/>	Geography Integration ID	<input type="checkbox"/>	Geography Type	<input type="checkbox"/>	Geography Code	<input type="checkbox"/>	City	<input type="checkbox"/>	State	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-00396	<input type="checkbox"/>	130011834511	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	00396	<input type="checkbox"/>	San Juan	<input type="checkbox"/>	PR	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-00400	<input type="checkbox"/>	130003832898	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	00400	<input type="checkbox"/>	Pleasantville	<input type="checkbox"/>	NY	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-10001	<input type="checkbox"/>	120001817109	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	10001	<input type="checkbox"/>	New York	<input type="checkbox"/>	NY	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-10002	<input type="checkbox"/>	120001817116	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	10002	<input type="checkbox"/>	New York	<input type="checkbox"/>	NY	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-10003	<input type="checkbox"/>	120001817125	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	10003	<input type="checkbox"/>	New York	<input type="checkbox"/>	NY	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-10004	<input type="checkbox"/>	120001817131	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	10004	<input type="checkbox"/>	New York	<input type="checkbox"/>	NY	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-10005	<input type="checkbox"/>	120001817134	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	10005	<input type="checkbox"/>	New York	<input type="checkbox"/>	NY	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-10006	<input type="checkbox"/>	120001817136	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	10006	<input type="checkbox"/>	New York	<input type="checkbox"/>	NY	<input type="checkbox"/>
<input type="checkbox"/>	Add	<input type="checkbox"/>	Vaccine New York Co..	<input type="checkbox"/>	OSR34CB2IPSV3V4...	<input type="checkbox"/>	POST-10007	<input type="checkbox"/>	120001817138	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	10007	<input type="checkbox"/>	New York	<input type="checkbox"/>	NY	<input type="checkbox"/>

- **Action:** Corresponding geography marked for *Add* or *Delete*.

Note: Actions with a solid-colored icon Delete indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color Delete 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**).

Proposed Geographies												
Action	Change	Territory Name	Territory Integr...	Geography Name	Geography Integr...	Geography Type	Geography Code	City	State	Country	Region Name	
Add	CR Added	Vaccine New York Co...	05R34CBZ1PSIV3V4...	POST-00396	130011834511	Postal Code	00396	San Juan	PR	United States	US	
Add	CR Added	Vaccine New York Co...	05R34CBZ1PSIV3V4...	POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	United States	US	

- **Action:** Corresponding geography marked for *Add* or *Delete*.

Note: Actions with a solid-colored icon Delete indicate a simulated change made by the user or HO user. Actions with an icon outlined in a color Delete 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.

Proposed Geographies													
Differences		Geography Change Requests											
Action	Change	Territory Name	Territory Integr...	Geography Name	Geography Inte...	Geography Type	Geography Code	City	State	Country	Region Name		
Add	CR Added	Vaccine New York Co...	OSR34CEZ3P5V3V4...	POST-00396	130011834511	Postal Code	00396	San Juan	PR	United States	US		
Add	CR Added	Vaccine New York Co...	OSR34CEZ3P5V3V4...	POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	United States	US		

- **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:

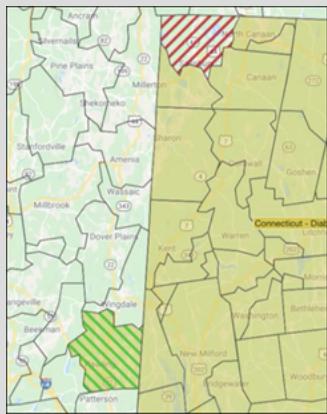
The following buttons are available on the **Geography Change Requests** tab:

Geography Change Requests											
Geography Change Requests											
Action	Territory Name	Territory Integrati...	Geography Name	Geography Integr...	Geography Type	Geography Code	City	State	CR Status	CR Approval Status	
<input type="checkbox"/> Add	Vaccine New York Coun...	OSR34CBZ3PS/3V4MH	POST-00396	130011834511	Postal Code	00396	San Juan	PR	Submitted	Pending	
<input type="checkbox"/> Add	Vaccine New York Coun...	OSR34CBZ3PS/3V4MH	POST-00400	130001832898	Postal Code	00400	Pleasantville	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*.
- **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

- From the **Proposed Accounts** tab or the **Account Change Requests** tab, click **New Add CR**.

Proposed Accounts								
Proposed Accounts		Search...		Starts With		Actions		
Action	Territory Name	Territory Integr...	Account Name	Account Integr...	Account Type	Account Specialty	Account Addi...	
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	5 Corners Family Practice	WUSE00138971	Practice	Family medicine	ALBANY NY 1:	
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	Abrazo Medical Group N	WUSE00150716	Practice	Family medicine	DALLAS TX 75	
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	Adam Stallmer	WUSM01786365	Medical Professional	Family medicine	LATHAM NY 1	
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	Adetutu Adetona	WUSM00350369	Medical Professional	Family medicine	ALBANY NY 1:	
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	Alan Sanders	WUSM00469635	Medical Professional	Family medicine	ALBANY NY 1:	

- Select the territory or multiple territories to add accounts to, then click **Next**.

Add Account to Territory

To Territory		Accounts	
Select the territory you want to add accounts to:			
Territory Name		Territory Type	
<input checked="" type="radio"/>	Vaccine Albany Count...	Territory	Vaccine SF
<input type="radio"/>	Vaccine Allegany Cou...	Territory	Vaccine SF
<input type="radio"/>	Vaccine Bronx County...	Territory	Vaccine SF
<input type="radio"/>	Vaccine Broome Cou...	Territory	Vaccine SF
<input type="radio"/>	Vaccine Cattaraugus...	Territory	Vaccine SF
20 of 63 (1 selected)		<input type="button" value="Cancel"/>	
		<input type="button" value="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.

- Select the accounts you want to add, then click **Save**.

Add Account to Territory

Select the accounts you want to add:

Action	Account Name	Account Integr...	Account Type	Account Specialty	Account Address	Regis...
<input checked="" type="checkbox"/>	1 Community Medical Cl	WUSE00091052	Department	Other specialty	BALDWIN PARK CA 91706, LOS ANGELES CA 90...	US
<input type="checkbox"/>	1 World Medicine	WUSE00421772	Practice	Internal medicine - fa...	LAS VEGAS NV 89102	US
<input checked="" type="checkbox"/>	10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine	LUTZ FL 33559	US
<input type="checkbox"/>	10th Street Comprehensi...	WUSE00677376	Practice	Addiction medicine	MILWAUKEE WI 53221	US
<input type="checkbox"/>	112 Gvr Medical, P.c	WUSE00186864	Practice	Family medicine	FLUSHING NY 11355, FOREST HILLS NY 11375	US

20 of 328594 (2 selected)

Previous 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

- From the **Proposed Geographies** tab or the **Geography Change Requests** tab, click **New Add CR**.

Dashboard Proposed Accounts Account Change Requests **Proposed Geographies** Geography Change Requests

All Differences CR Impact

Proposed Geographies Starts With New Add CR New Delete CR Delete Export

Action	Territory Name	Territory Integr...	Geography Name	Geography Inte...	Geography Type	Geography Code	City
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	POST-12007	120001818334	Postal Code	12007	Alcove
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	POST-12009	120001818348	Postal Code	12009	Altamont
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	POST-12023	120001818364	Postal Code	12023	Berne
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	POST-12041	120001818414	Postal Code	12041	Clarksville
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	POST-12045	120001818396	Postal Code	12045	Coeymans
<input type="checkbox"/>	Vaccine Albany Count...	BWNUQE4X3PSIV3U...	POST-12046	120001818403	Postal Code	12046	Coeymans Hol...

Note: If a geography is already aligned to another territory in the same sales force, an error appears.

- Select the territory or multiple territories to add geographies to, then click **Next**.

Add Geography to Territory

To Territory

Select the territory you want to add geographies to:

Territory Name	Territory Integr...	Territory Type	Sales Force Name	User Name	Region Name	Effective D...	End I...
Vaccine Albany Count...	BWNUQE4X3PSIV3U...	Territory	Vaccine SF	Shannon Sanders	US	5/1/2021	
<input checked="" type="checkbox"/> Vaccine Allegany Cou...	L6XMR7GT3PSIV3CY2Y	Territory	Vaccine SF		US	5/1/2021	
Vaccine Bronx County...	LLNFOXK93PSIV3UP6U	Territory	Vaccine SF		US	5/1/2021	
Vaccine Broome Cou...	8AUGD5YG3PSIV3UP...	Territory	Vaccine SF		US	5/1/2021	
Vaccine Cattaraugus ...	M67VK04BE2PSIV3H1DE	Territory	Vaccine SF		US	5/1/2021	

20 of 63 (1 selected)

Cancel Next

- Select the geographies you want to add, then click **Save**.

Add Geography to Territory

Geographies

From the geographies, select those you want to add:

Action	Geography N...	Geography Inte...	Geography Type	Geography Code	City	State	Coun...
<input type="checkbox"/>	POST-00000	130008295676	Postal Code	00000	Unknown	ZZ	Unite...
<input type="checkbox"/>	POST-00001	130003832896	Postal Code	00001	Unknown	CA	Unite...
<input checked="" type="checkbox"/>	POST-00396	130011834511	Postal Code	00396	San Juan	PR	Unite...
<input checked="" type="checkbox"/>	POST-00400	130003832898	Postal Code	00400	Pleasantville	NY	Unite...
<input checked="" type="checkbox"/>	POST-00500	130009225976	Postal Code	00500	Holtsville	NY	Unite...

20 of 44235 (3 selected)

Previous 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

- From the **Proposed Accounts** tab or the **Account Change Requests** tab, click **New Delete CR**.

Dashboard	Proposed Accounts	Account Change Requests	Proposed Geographies	Geography Change Requests
All Differences CR Impact				
	Proposed Accounts	Search... <input type="text"/> Starts With <input type="checkbox"/>	New Add CR <input type="button" value="New Add CR"/>	New Delete CR <input type="button" value="New Delete CR"/>
	Action Territory Name ↑ Territory Integr... Account Name Account Integr... Account Type Account Specialty Account Addi...	Vaccine Albany Count... BWNUQE4X3PSIV3U... 5 Corners Family Practice WUSE00138971 Practice Family medicine ALBANY NY 1...		
		Vaccine Albany Count... BWNUQE4X3PSIV3U... Abrizo Medical Group M WUSE00150716 Practice Family medicine DALLAS TX 75...		
		Vaccine Albany Count... BWNUQE4X3PSIV3U... Adam Stallmer WUSM01786365 Medical Professional Family medicine LATHAM NY 1...		
		Vaccine Albany Count... BWNUQE4X3PSIV3U... Adetutu Adetona WUSM00350369 Medical Professional Family medicine ALBANY NY 1...		
		Vaccine Albany Count... BWNUQE4X3PSIV3U... Alan Sanders WUSM00469635 Medical Professional Family medicine ALBANY NY 1...		

2. Select the territory or multiple territories to delete accounts from, then click **Next**.

Delete Account from Territory

From Territory

Select the territory you want to delete accounts from:

Territory Name ↑	Territory Integr...	Territory Type	Sales Force Name	User Name	Region Name	Effective D...	End I...
Vaccine Albany Count...	BWNUQE4X3PSIV3U...	Territory	Vaccine SF	Shannon Sanders	US	5/1/2021	
<input checked="" type="radio"/> Vaccine Allegany Cou...	L6XMR7GT3PSISYCX2Y	Territory	Vaccine SF		US	5/1/2021	
Vaccine Bronx County...	LLNOXK93PSIV3UP6U	Territory	Vaccine SF		US	5/1/2021	
Vaccine Broome Cou...	8AUGD5YG3PSIV3UP...	Territory	Vaccine SF		US	5/1/2021	
Vaccine Cattaraugus...	MAZV0ABE3DSV31ID6	Territory	Vaccine SF		US	5/1/2021	

20 of 63 (1 selected)

Cancel **Next**

3. Select the aligned accounts you want to delete, then click **Save**.

Delete Account from Territory

Aligned Accounts

From the aligned accounts, select those you want to delete:

Action	Account Name ↑	Account Integr...	Account Type	Account Specialty	Account Address	Region
<input checked="" type="checkbox"/> Aligned	Advantagecare Physician	WUSE0090407	Practice	Other specialty	BROOKLYN NY 11201, BROOKLYN NY 11218, B...	US
<input checked="" type="checkbox"/> Aligned	Ahmed Rezk	WUSM0130531	Medical Professional	Family medicine	HOLMDEL NJ 07733, NEW WINDSOR NY 12553	US
<input checked="" type="checkbox"/> Aligned	Alexandria Howard	WUSM01120626	Medical Professional	Family medicine	CLEVELAND OH 44106, MIDDLETON NY 1094...	US
<input checked="" type="checkbox"/> Aligned	Alicia Olowu	WUSM03682180	Medical Professional	Family medicine	MIDDLETOWN NY 10940	US

20 of 228 (1 selected)

Previous **Save**

To delete geographies from the alignment:

- From the **Proposed Geographies** tab or the **Geography Change Requests** tab, click **New Delete CR**.

The screenshot shows the 'Proposed Geographies' tab in a software interface. At the top, there are tabs for Dashboard, Proposed Accounts, Account Change Requests, Proposed Geographies (which is underlined in purple), and Geography Change Requests. Below the tabs, there are three buttons: All, Differences, and CR Impact. Underneath these buttons is a search bar with a placeholder 'Search...' and a checkbox labeled 'Starts With'. To the right of the search bar are buttons for 'New Add CR' (highlighted with a red box), 'New Delete CR' (also highlighted with a red box), 'Delete', and 'Export'. The main area contains a table with columns: Action, Territory Name, Territory Integer..., Geography Name, Geography Integer..., Geography Type, Geography Code, and City. The table lists several entries, each starting with 'Vaccine Albany Count...', such as 'Vaccine Albany Count... BWNUQE4X3PSIV3U...' and 'Vaccine Albany Count... BWNUQE4X3PSIV3U... POST-12046'. The last entry is 'Vaccine Albany Count... BWNUQE4X3PSIV3U... POST-12046'.

- Select the territory or multiple territories to delete geographies from, then click **Next**.

The screenshot shows the 'Delete Geography from Territory' dialog box. At the top, it says 'Delete Geography from Territory'. Below that, there's a purple header bar with 'From Territory' on the left and 'Aligned Geographies' on the right. The main area is titled 'Select the territory you want to delete geographies from:' and contains a search bar and a checkbox for 'Starts With'. A table lists territories with columns: Territory Name, Territory Integer..., Territory Type, Sales Force Name, User Name, Region Name, Effective Date, and End Date. One row is selected, indicated by a blue circle with a white dot. The table shows entries like 'Vaccine Albany Count...', 'Vaccine Allegany Cou...', 'Vaccine Bronx County...', 'Vaccine Broome Cou...', and 'Vaccine Cattaraugus...'. At the bottom, there are buttons for 'Cancel' and 'Next' (highlighted with a red box). A status message at the bottom left says '20 of 63 (1 selected)'.

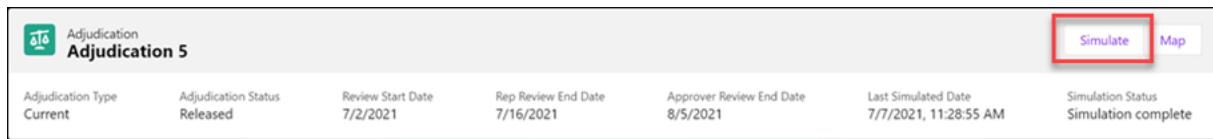
- Select the geographies you want to delete, then click **Save**.

The screenshot shows the 'Delete Geography from Territory' dialog box again. The purple header bar now has a dropdown arrow pointing down. The main area is titled 'From the aligned geographies, select those you want to delete:' and contains a search bar and a checkbox for 'Starts With'. A table lists aligned geographies with columns: Action, Geography Name, Geography Integer..., Geography Type, Geography Code, City, State, and Count. Several rows are selected, indicated by a blue circle with a white dot and the word 'Aligned'. The table shows entries like 'Aligned POST-12007 120001818334 Postal Code 12007 Alcove NY Unite', 'Aligned POST-12009 120001818348 Postal Code 12009 Altamont NY Unite', 'Aligned POST-12023 120001818364 Postal Code 12023 Berne NY Unite', and 'Aligned POST-12041 120001818414 Postal Code 12041 Clarksville NY Unite'. At the bottom, there are buttons for 'Previous' and 'Save' (highlighted with a red box). A status message at the bottom left says '20 of 78 (1 selected)'.

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*.



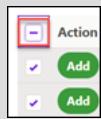
To submit adjudication changes

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**.

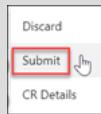
A screenshot of the Account Change Requests tab. The table lists several change requests with columns for Action, Territory Name, Account Name, Account Type, and Account Address. To the right of the table are buttons for New Add CR, New Delete CR, Discard, Submit (highlighted with a red box), Approve, Reject, and Export.

Action	Territory Name	Account Name	Account Type	Account Specialty	Account Address
Add	Vaccine Allegany Cou...	1 World Medicine	Practice	Internal medicine - fa...	LAS VEGAS NV 891C
Add	Vaccine Broome Cou...	1 Community Medical Cl	Department	Other specialty	BALDWIN PARK CA 1
Delete	Vaccine Erie County (...	Algirdas Gamziukas	Medical Professional	Family medicine	BUFFALO NY 14225
Add	Vaccine New York Co...	1488 Family Medicine Gr	Practice	Family medicine	CONROE TX 77384

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.

A screenshot of a "Submit Account Change Request" dialog box. At the top, there's a header bar with dropdown menus for Action, Territory Name, Territory Integr..., Account Name, Account Integr..., and Account Type. Below this is a table row with an "Add" button, "Vaccine New York Co...", "OSR34CBZ3PSIV3V4...", "1 Community Medical Cl", "WUSE00091052", and "Department". In the bottom right corner of the dialog, there are "Cancel" and "Save" buttons, with "Save" being highlighted with a red square.

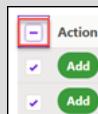
The **CR Status** changes to *Submitted* and the **CR Approval Status** to *Pending*.

To discard adjudication changes

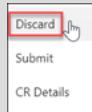
1. Click the check box(es) next to the change request(s) you want to discard, then click **Discard**.

The screenshot shows the 'Account Change Requests' section of a software interface. At the top, there's a search bar labeled 'Search...' and a filter dropdown set to 'Starts With'. Below the search bar are several buttons: 'New Add CR', 'New Delete CR', 'Discard' (which is highlighted with a red box), 'Submit', 'Approve', 'Reject', and 'Export'. The main area displays a table of account changes with columns for Action, Territory Name, Territory Integr..., Account Name, Account Integr..., Account Type, Account Specialty, and Account Address. Each row contains an 'Add' button (green with white text) and a 'Delete' button (red with white text). The table shows four rows of data, with the last row being partially visible. At the bottom left of the table area, it says '4 of 4'.

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**.

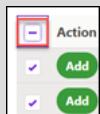
This is a modal dialog titled 'Discard Account Change Request'. It contains a table with columns for Action, Territory Name, Territory Integr..., Account Name, Account Integr..., and Account Type. The table lists four changes related to 'Vaccine New York Co...'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save' (which is highlighted with a red box).

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.

- 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**.



Approve Geography Change Request

Action	Territory Name	Territory Integr...	Geography Name	Geography Inte...	Geography Type
Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	POST-00396	130011834511	Postal Code
Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	POST-00400	130003832898	Postal Code

Manager Comment

Cancel Save

A screenshot of a "Approve Geography Change Request" dialog box. It contains a table with two rows of data. The first row has "Add" buttons in the "Action" column. The second row also has "Add" buttons. Below the table is a "Manager Comment" input field, which is highlighted with a red border. At the bottom right are "Cancel" and "Save" buttons, with "Save" being highlighted by a red square.

- Enter comments about the approval, if desired, then click **Save**.

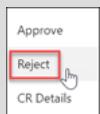
To reject the Rep's account and geography changes (DMs only)

- 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**.



Reject Geography Change Request

Action	Territory Name	Territory Integr...	Geography Name	Geography Inte...	Geography Type
Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	POST-00396	130011834511	Postal Code
Add	Vaccine New York Co...	OSR34CBZ3PSIV3V4...	POST-00400	130003832898	Postal Code

Manager Comment

Cancel Save

- 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](#).

Engagement Plan ...	Engagement Plan Int...	Engagement Plan De...	Sales Force Name	Region Name	Effective Date	End Date
1 H2 Vaccine SF Cycle	NMKXARZV47V3VU98QH	Vaccine SF	US	7/15/2021	12/31/2021	

1 Records

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 H2 Vaccine SF Cycle		As Of Date Aug 31, 2021	
Engagement Plan Integration Id NMKXARZV47V3VU98QH	Sales Force Name Vaccine SF	Effective Date 7/15/2021	End Date 12/31/2021

- **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

The screenshot shows a software interface for managing engagement plans. At the top, there's a header with a logo, the title "Engagement Plan AB Eng Plan", and a date "Sep 13, 2021". Below the header, there are four columns of basic information:

Engagement Plan Integration Id C14QPZQQ4R554PW/VT	Sales Force Name Oncology Sales	Effective Date 9/13/2021	End Date 9/30/2021
------------------------------------------------------	------------------------------------	-----------------------------	-----------------------

Below this, there are two tabs: "Details" (which is selected) and "View". The "Details" tab contains several sections of configuration data:

- Engagement Plan Name:** AB Eng Plan
- Effective Date:** 9/13/2021
- Engagement Plan Description:** (empty)
- Region Name:** US
- Calculation Details:**
 - Working Days:** 12
 - Target Call Rate:** 10
 - Minimum Call Rate:** (empty)
 - Maximum Call Rate:** (empty)
- External Ids:** (empty)
- Audit Information:** (empty)

- **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

This screenshot shows the "Calculation Details" section of the engagement plan configuration. It includes the following data:

Working Days 122	Target Call Rate 20
Minimum Call Rate 10	Maximum Call Rate 25

- **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 Ids
External ID1

- **External ID1:** Additional identification number(s) for cross referencing.

Audit Information

Audit Information
<p>Created By Aditi Kapoor, 2/24/2021, 8:44 AM</p> <p>Last Modified By Aditi Kapoor, 2/24/2021, 8:44 AM</p>

- **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.

Details	View
Channels	
Channel Name	Weight(%)
Face to Face	100
Segments	
Gold	
Rank	1
Segment Description	New Vaccine SF Rule
Account Rules	New Vaccine SF Rule
Channel Name	Call Frequency
Face to Face	12

Channels

Channels	
Channel Name	Weight(%)
Face to Face	100

- **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

Segments	
Gold	
Rank	1
Segment Description	New Vaccine SF Rule
Account Rules	
Channel Name	Call Frequency
Face to Face	12

- **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.

The screenshot shows a user interface for the 'System Health' module. At the top, there's a header with a warning icon and the text 'System Health'. Below that is a section titled 'Outlier Rules' with a table. The table has four columns: 'Account Rule Name', 'Account Rule Integration Id', 'Potential Issue', and 'Recommendation'. There is one record displayed: 'ANS Rule' (highlighted with a red box), 'F8H57J51292HVO3KSP', 'Rule did not align any accounts', and 'Please check the rule for accuracy'. At the bottom of the table, it says '1 Records' and 'View All'.

- **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 New Scenario							New	Edit	Simulate	Commit	Copy	Delete	Map	Bulk Import
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time							
Pending	User	US	2/2/2022											

- **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.

Scenario New Vaccine SF Rule									New	Edit	Simulate	Commit	Copy	Delete	Map	Bulk Import
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time									
Committed	User	US	6/1/2021		7/9/2021, 1:34:33 PM	7/9/2021, 1:37:09 PM	7/9/2021, 1:38:08 PM									
Details																
Scenario Name	New Vaccine SF Rule				Scenario Integration Id	DJIM431K47UZ17V88P										
Effective Date	6/1/2021				End Date											
Description					Region	US										
Scenario Status	Committed				Scenario Type	User										
Error Message					Adjudication											

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

Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
Scenario Name	New Vaccine SF Rule				Scenario Integration Id	DJIM431K47UZ17V88P				
Effective Date	6/1/2021				End Date					
Description					Region	US				
Scenario Status	Committed				Scenario Type	User				
Error Message					Adjudication					

General Information

The screenshot shows a software interface for managing scenarios. At the top, there's a navigation bar with buttons for New, Edit, Simulate, Commit, Copy, Delete, Map, and Bulk Import. Below the navigation bar, the title "Scenario J. Abdul Scenario" is displayed. On the left, a sidebar titled "Details" is selected, showing various configuration tabs: Accounts, Geographies, Products, Rules, Engagement Plans, Sales Forces, Territories, User Assignments, Results, and Errors. The "Details" tab is currently active. The main content area contains several sections with input fields and dropdown menus. These include:

- Scenario Name: J. Abdul Scenario
- Effective Date: 2/3/2022
- Description: (empty)
- Scenario Status: Pending
- Error Message: (empty)
- Scenario Integration Id: N2J1SHU05ZT0E87PK9
- End Date: (empty)
- Region Name: US
- Scenario Type: User
- Adjudication Name: (empty)

- **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

This screenshot shows the Audit Information section of the scenario details. It includes a collapsible header "Audit Information" with a downward arrow icon. Below the header, there are two rows of audit details:

- Created By: Document Global Ho, 8/13/2020, 1:54 PM
- Last Modified By: Document Global Ho, 8/13/2020, 1:54 PM

- **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 screenshot shows the 'Overview' section of a scenario configuration interface. It is divided into several sections: 'Accounts' (Account Territory Explicits, Account Territory Exclusions, Account Sales Force Exclusions), 'Products' (Product Explicit, Product Exclusions, Product Sales Forces, Account Product Restriction Explicit, Account Product Territory Restriction Explicit), 'Geographies' (Geography Territories, Rules, Account Alignment Rules, Account Product Restriction Rules, Engagement Plans, Engagement Plans), 'Territories' (Territories, Territory Hierarchies, Sales Forces, Sales Force Hierarchies, Product Sales Forces, User Assignments, User Assignments), and a central toolbar with icons for Cards, List, and Map.

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.

The screenshot shows the 'Scenario Creation' page for a 'New Vaccine SF Rule'. The top bar includes buttons for New, Edit, Simulate, Commit, Copy, Delete, Map, and Bulk Import. Below the bar, there are fields for Scenario Status (Committed), Scenario Type (User), Region Name (US), Effective Date (6/1/2021), End Date, Processing Start Time (7/9/2021, 1:34:33 PM), Processing End Time (7/9/2021, 1:37:09 PM), and Sync End Time (7/9/2021, 1:38:08 PM). At the bottom, a navigation bar lists tabs: Details (selected), Accounts, Geographies, Products, Rules, Engagement Plans, Sales Forces, Territories, User Assignments, Results, and Errors.

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](#)

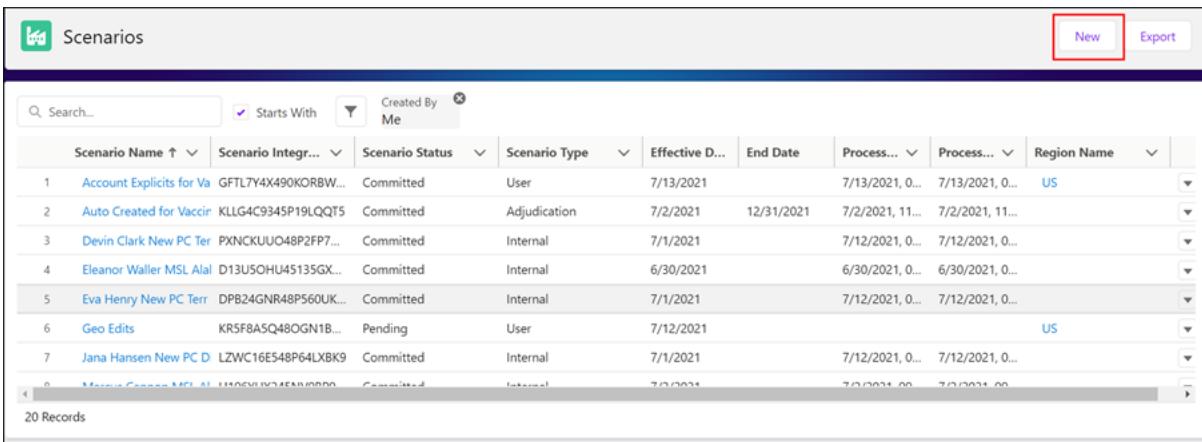
- [Commit a Scenario](#)
- [Copy a Scenario](#)
- [Delete a Scenario](#)

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**.



The screenshot shows a table titled "Scenarios" with columns: Scenario Name, Scenario Integr..., Scenario Status, Scenario Type, Effective D..., End Date, Process..., Region Name. There are 20 records listed. The "New" button is highlighted with a red box in the top right corner of the header.

Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Region Name
1 Account Explicits for Va	GFTL7Y4X490KORBW...	Committed	User	7/13/2021	7/13/2021, 0...	7/13/2021, 0...	US
2 Auto Created for Vaccin	KLLG4C9345P19LQQT5	Committed	Adjudication	7/2/2021	12/31/2021	7/2/2021, 11...	7/2/2021, 11...
3 Devin Clark New PC Te	PXNCKUUO48P2FP7...	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...
4 Eleanor Waller MSL Alai	D13U50HU45135GX...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...
5 Eva Henry New PC Terr	DPB24GNR48P560UK...	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...
6 Geo Edits	KR5F8A5Q48OGN1B...	Pending	User	7/12/2021			US
7 Jana Hansen New PC D	LZWC16E548P64LXBK9	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...
8 Maria Gomes MSL AI	1H0QKXV4EN1000	Committed	Internal	7/2/2021		7/2/2021, 00	7/2/2021, 00

20 Records

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

New Scenario

Information

* Scenario Name	Scenario Integration Id
<input type="text"/>	ZNVH0OVJ2EYLDU74PL
* Effective Date	End Date
<input type="text"/>	<input type="text"/>
Description	Region
<input type="text"/>	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input style="border: 2px solid red; background-color: #58357E; color: white; padding: 2px 10px; border-radius: 5px;" type="button" value="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

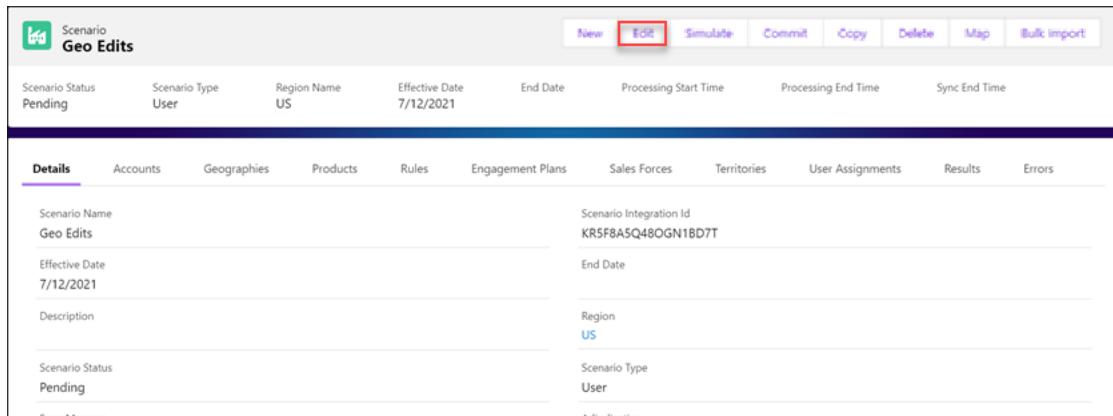
1. Click **Scenarios** from the primary navigation bar.
2. After you find the scenario, do one of the following:
 - Click the drop-down for the scenario you want to edit and select **Edit**.

The screenshot shows a list of scenarios in a table. A context menu is open over the 7th row, which contains the scenario "Jana Hansen New PC D". The menu options are: View, Edit (highlighted with a red box), Simulate, Commit, Copy, Delete, and Map.

Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Nam...
1 Account Explicts for Va	GFTL7Y4X490KORBW...	Committed	User	7/13/2021		7/13/2021, 0...	7/13/2021, 0...	US
2 Auto Created for Vaccin	KLLG4C9345P19LQQTS	Committed	Adjudication	7/2/2021	12/31/2021	7/2/2021, 11...	7/2/2021, 11...	
3 Devin Clark New PC Ter	PXNCKUUO48P2FP7...	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...	
4 Eleanor Waller MSL Alal	D13USOHU45135GX...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...	
5 Eva Henry New PC Terr	DPB24GNR48P560UK...	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...	
6 Geo Edits	KR5F8A5Q48OGN1B...	Pending	User	7/12/2021				US
7 Jana Hansen New PC D	LZWC16E548P64LXBK9	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...	

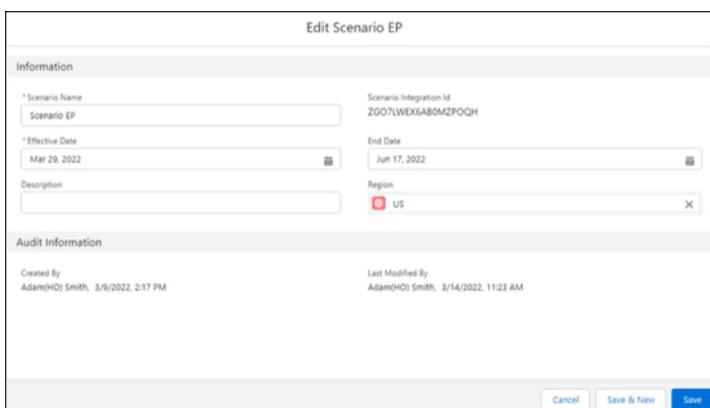
20 Records

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



The screenshot shows a table-based interface for managing scenarios. At the top, there's a header row with columns for Scenario Status (Pending), Scenario Type (User), Region Name (US), Effective Date (7/12/2021), End Date, Processing Start Time, Processing End Time, and Sync End Time. Below this is a navigation bar with tabs: Details, Accounts, Geographies, Products, Rules, Engagement Plans, Sales Forces, Territories, User Assignments, Results, and Errors. The 'Details' tab is selected. The main content area contains several input fields and dropdowns. One field is labeled 'Scenario Name' with the value 'Geo Edits'. Another field is 'Effective Date' with the value '7/12/2021'. A dropdown for 'Region' is set to 'US'. Other fields include 'Scenario Status' (Pending), 'Scenario Integration Id' (KR5F8A5Q48OGN1BD7T), and 'Scenario Type' (User). The entire interface has a clean, modern look with a light blue header and white background.

3. Modify the scenario information and click **Save**.



The screenshot shows a modal dialog titled 'Edit Scenario EP'. It has two main sections: 'Information' and 'Audit Information'. In the 'Information' section, there are fields for 'Scenario Name' (Scenario EP), 'Effective Date' (Mar 29, 2022), 'End Date' (Jun 17, 2022), and 'Region' (US). The 'Audit Information' section shows 'Created By' (Adam(HO) Smith, 3/9/2022, 2:17 PM) and 'Last Modified By' (Adam(HO) Smith, 3/14/2022, 11:23 AM). At the bottom right of the dialog are three buttons: 'Cancel', 'Save & New', and '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**.

Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name	View
1 Account Explicts for Va	GFTL74X490KORBW...	Committed	User	7/13/2021	7/13/2021, 0...	7/13/2021, 0...	7/13/2021, 0...	US	New
2 Auto Created for Vaccin	KLLG4C934SP19LQQT5	Committed	Adjudication	7/2/2021	12/31/2021	7/2/2021, 11...	7/2/2021, 11...		Edit
3 Devin Clark New PC Ter	PXNCUUO48P2FP7...	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...		Simulate
4 Eleanor Waller MSL Alal	D13U5OHU45I135GX...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...		Commit
5 Eva Henry New PC Terr	DPB24GNR48P560UK...	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...		Copy
6 Geo Edits	KR5F8A5Q48QGN1B...	Pending	User	7/12/2021				US	Delete
7 Jana Hansen New PC D	LZWC16E548P64LXBK9	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...		Map
8 Maxine Dawson ETC At	1HACU1N2X2000	Committed	Internal	7/12/2021		7/12/2021, 0...	7/12/2021, 0...		

- Click the name of the scenario to go to the Scenario Details page, then click **Copy**.

Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time
Pending	User	US	7/12/2021				

Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
Scenario Name Geo Edits						Scenario Integration Id KR5F8A5Q48QGN1BD7T				
Effective Date 7/12/2021						End Date				
Description						Region US				
Scenario Status Pending						Scenario Type User				

3. Enter information for the new scenario, then click **Save**.

Copy Scenario

Information	
*Scenario Name <input type="text" value="Copy of Geo Edits"/>	Scenario Integration Id DTZFHYJO4DO1VGH109
*Effective Date <input type="text" value="Jul 12, 2021"/>	End Date <input type="text"/>
Description <input type="text"/>	Region <input type="text" value="US"/>
<input type="button" value="Cancel"/> <input style="background-color: #0072bc; color: white; border: 1px solid #0072bc; border-radius: 5px; padding: 2px 10px;" type="button" value="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

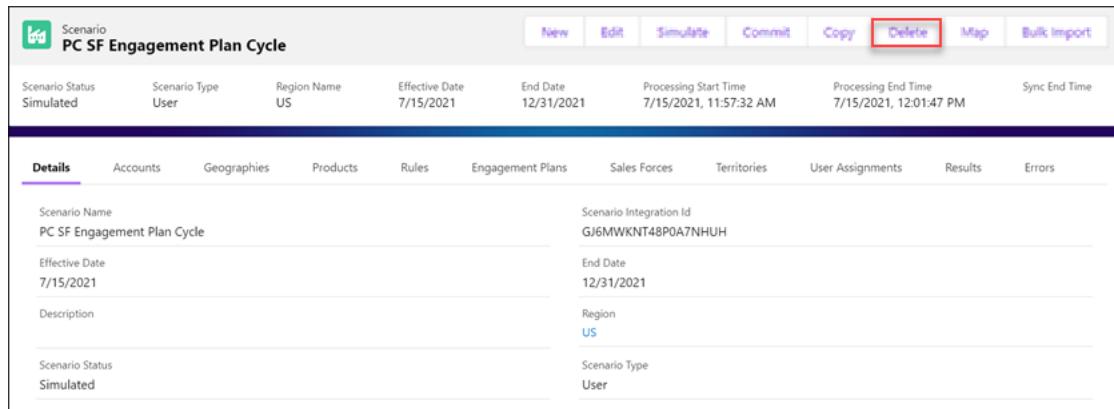
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, do one of the following:
 - Click the drop-down for the scenario you want to end date and select **Delete**.

Scenarios

The screenshot shows a table of scenarios with the following columns: Scenario Name, Scenario Integr..., Scenario Status, Scenario Type, Effective D..., End Date, Process..., Process..., and Region Name. The last row (index 20) has a context menu open, with the 'Delete' option highlighted by a red box. The menu also includes options: View, Edit, Simulate, Commit, Copy, and Map.

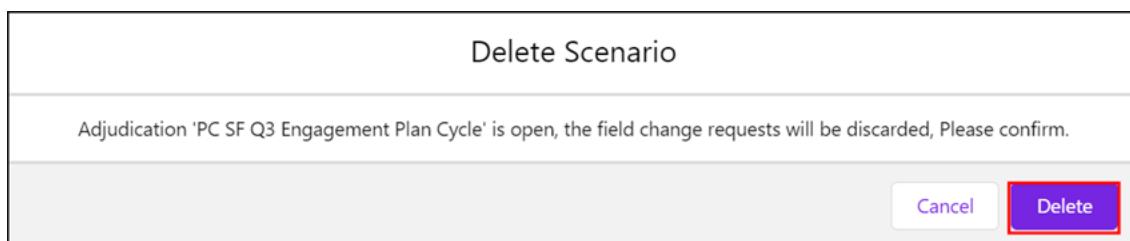
Scenario Name ↑	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
13 New PC or User Rule	LY8PJWVQ4BHHQFEL...	Committed	User	7/21/2021	10/31/2021			US
14 New Scenario	SOZB6FA947V6FNM3...	Pending	User	6/1/2021	7/9/2021, 02...	7/9/2021, 02...		US
15 New Structure	4MYHASY7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
16 New Vaccine SF Engage	DJIM431K47UZ17V88P	Committed	User	6/1/2021	7/9/2021, 01...	7/9/2021, 01...		US
17 New Vaccine SF Rule	GJ6MWKNT48P0A7N...	Committed	User	7/15/2021	12/31/2021	7/15/2021, 1...	7/15/2021, 1...	US
18 PC SF Engagement Plan	NH9FZMRE45QJF5B1X	Simulated	User	7/2/2021	12/31/2021	7/2/2021, 10...	7/2/2021, 10...	US
19 Scenario 12	9669HMM9453RRY8...	Committed	User	7/15/2021	12/31/2021	7/9/2021, 01...	7/9/2021, 01...	US
20 Vaccine SF Engagement		Simulated	User					

- Click the name of the scenario to go to the Scenario Details page, and then click **Delete**.



Scenario		New	Edit	Simulate	Commit	Copy	Delete	Map	Bulk Import
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time		
Simulated	User	US	7/15/2021	12/31/2021	7/15/2021, 11:57:32 AM	7/15/2021, 12:01:47 PM			
Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results
Scenario Name PC SF Engagement Plan Cycle						Scenario Integration Id GJ6MWKNT48P0A7NHUH			
Effective Date 7/15/2021						End Date 12/31/2021			
Description						Region US			
Scenario Status Simulated						Scenario Type User			

- 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

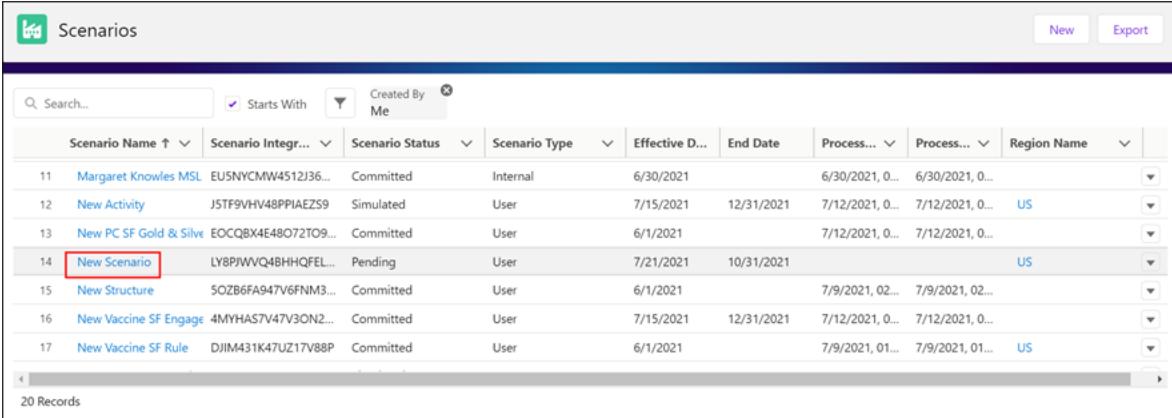
You can define Account Alignment Rules for a specific sales force for past, current, or future effective dates. These rules specify which accounts should be dynamically aligned to the sales force. The System Administrator's configuration can include any account attribute, including custom attributes. 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.

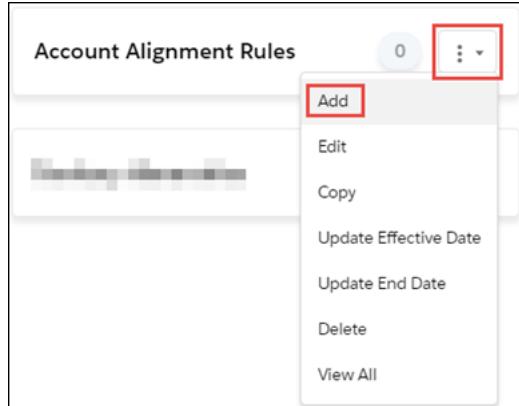
To add an account alignment rule to a scenario

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.



Scenario Name ↑	Scenario Integrat...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
11 Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...	6/30/2021, 0...	US
12 New Activity	J5TF9HVH48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13 New PC SF Gold & Silver	EOCQBX4E48072T09...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	US
14 New Scenario	LY8PJWWQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021		7/9/2021, 02...	US
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	US
16 New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
17 New Vaccine SF Rule	DJIM431K47U17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

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.

Action	Account Rule Name	Account Rule Integration Id	Description	Sales Force Name	Sales Force Integration Id
1 Add	K.Tant Rule	LXUUG500L5Z5KL7934P		Institutional SF	TFD109CD0J0I84U00H5

- Enter general information for the rule, then click **Next**.

Account Rule Add

Details Additional Regions Level 1 Summary

Enter the information for the rule

Information

• Account Rule Name: K.Tant Rule
Description:
• Account Rule Scope: Alignments

Account Rule Integration Id: LXUUG500L5Z5KL7934P

• Sales Force: Search Sales Forces...

External Ids

External ID1:

Buttons: Delete Level, Add Level, Cancel, Next, Save

- 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.
- 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 ↑	Region Integration Id	Country	Effective Date	End Date
US	10002000000107	United States	1/5/2019	

- **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.
- 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**.

Account Rule Add

The screenshot shows the 'Account Rule Add' interface. At the top, there's a navigation bar with arrows pointing left and right, labeled 'Level 1', and a 'Summary' button. Below the navigation is a section titled 'Accounts'. It includes a 'Scope' dropdown set to 'In Entire Universe' and a 'Territory Hierarchy' dropdown set to 'District'. There are also 'Filters' and a search bar. The main area has fields for 'Type' (set to 'Account'), 'Attribute' (set to 'Account Type'), 'Operator' (set to 'in'), and 'Value' (set to 'Select an Option'). At the bottom are buttons for 'Delete Level', 'Add Level', 'Previous', 'Next', and 'Save'.

- **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*.

The screenshot shows the 'Account Rule Add' interface. At the top, there are navigation arrows and tabs for 'Level 1' and 'Summary'. Below the tabs, there's a section titled 'Accounts' with a 'Scope' dropdown set to 'In Geography'. A 'Filters' section contains one condition: 'Type: Account' is compared to 'Account Type' using the 'in' operator, with a value of '13 Options Selected'. An 'AND' row is present but empty. At the bottom, there are buttons for 'Delete Level', 'Add Level', and 'Save'.

- 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

The screenshot shows the 'Affiliations' interface at 'Level 2'. It includes sections for 'Affiliations' and 'Parent Accounts'. The 'Affiliations' section has a 'Scope' dropdown set to 'In Geography'. The 'Parent Accounts' section has a 'Filters' section containing a condition: 'Type: Account' is compared to 'Account Type' using the 'in' operator, with a value of 'Select an Option'. At the bottom, there are buttons for 'Delete Level', 'Add Level', and 'Save'.

- 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

The screenshot shows the OCE Optimizer interface with two main sections: 'Affiliations' and 'Child Accounts'.

Affiliations Section:

- Scope:** Set to 'In Geography'.
- Direction:** Set to 'Down'.
- Filters:** A note says 'There are no filters currently defined here. Use the menu button above to add one.'

Child Accounts Section:

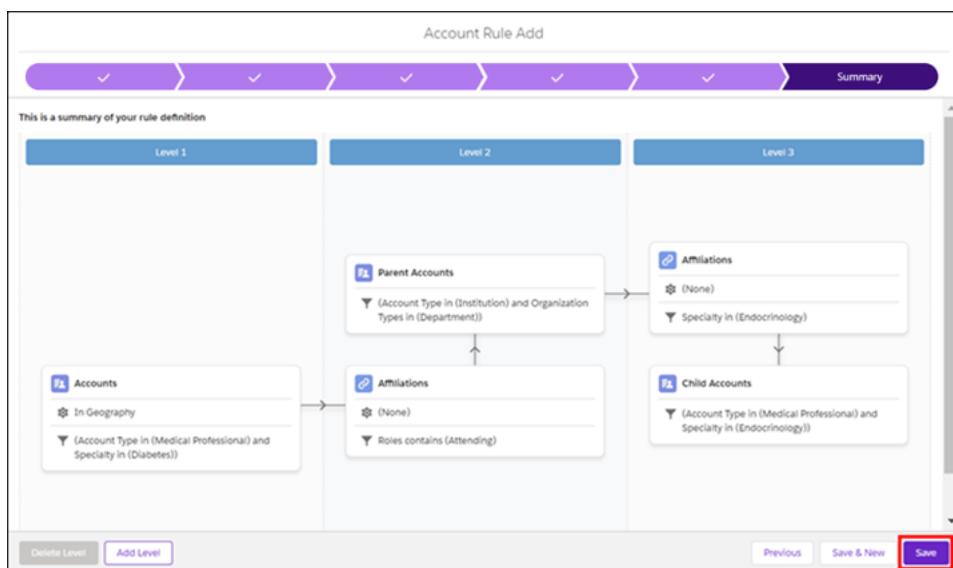
- Filters:** A note says 'There are no filters currently defined here. Use the menu button above to add one.'
- Filter Configuration:**
 - AND

*Type: Account	*Attribute: Account Specialty	*Operator: In	*Value: Addiction psychiatry
*Type: Account	*Attribute: Select an Option	*Operator: Select an Option	*Value:
- Buttons:** Delete Level, Add Level, Previous, Next, Save.

- 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

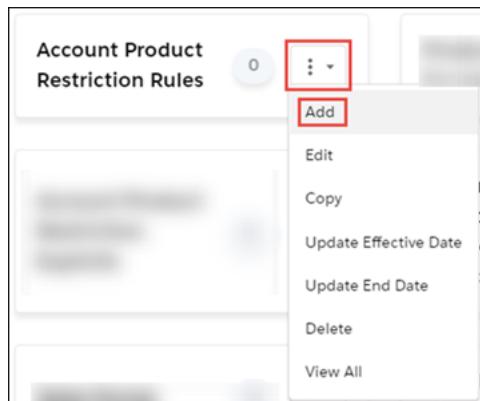
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add an account product restriction rule to.

Scenarios											New	Export			
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With	<input type="button"/>	Created By Me											
Scenario Name ↑	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name							
11 Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...								
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US							
13 New PC SF Gold & Silve	EOCQ8X4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...								
14 New Scenario	LY8PJWWQ4BHQQFEL...	Pending	User	7/21/2021	10/31/2021			US							
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...								
16 New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...								
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US							

20 Records

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.

Scenario Vaccine Sales								New	Edit	Simulate	Commit	Copy	Delete	Map	Bulk Import		
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time										
Pending	User		11/12/2020					Details	Accounts	Geographies	Products	Rules	Sales Forces	Territories	User Assignments	Results	Errors
								Add	Edit	Copy	Update Effective Date	Update End Date	Delete	Export			
								Add	Edit	Copy	Update Effective Date	Update End Date	Delete	Export			

- Enter general information for the rule, then click **Next**.

The screenshot shows the 'Account Product Restriction Rule Add' dialog box. At the top, there are tabs for 'Details', 'Additional Regions', 'Accounts', 'Products', and 'Summary'. The 'Details' tab is active. Below the tabs, there are sections for 'Information' (with fields for 'Account Product Rule Name' and 'Description'), 'External Ids' (with a field for 'External ID1'), and 'Sales Force' (with a search bar and a magnifying glass icon). At the bottom right, there are buttons for 'Cancel', 'Next', and 'Save', with 'Next' being highlighted by a red box.

- 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.

- 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**.

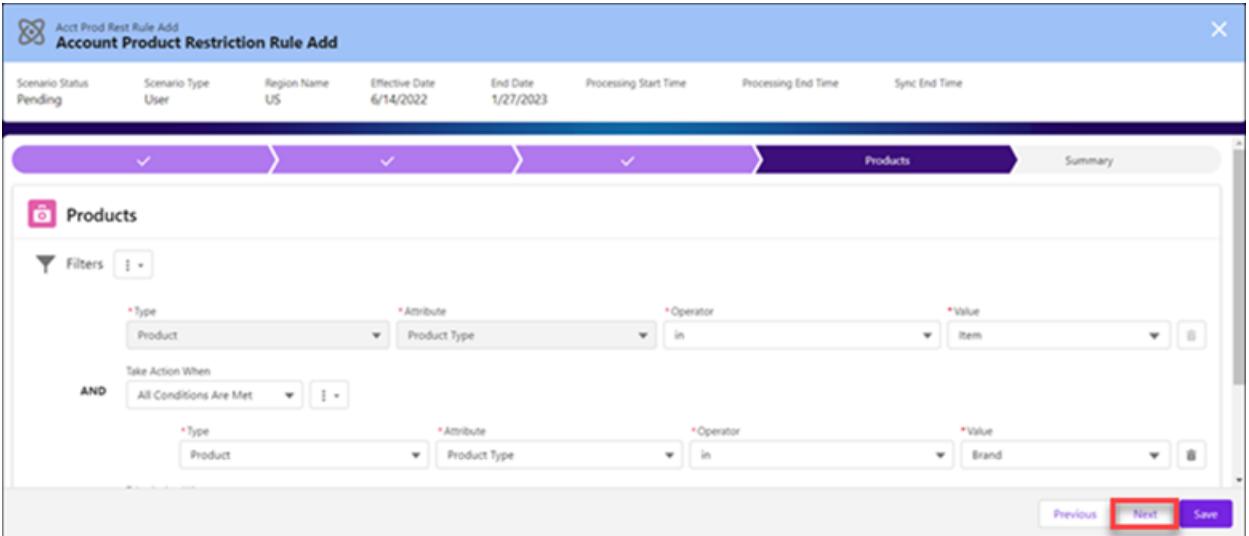
- Type:** Select *Account* or *Rating*.
- Attribute:** Select the attribute of the type, such as *Account Type*.
- Value:** Select a value, such as *Business Contact*, *Department*, *Medical Professional*, *Pharmacy*, or *Wholesaler*.
- Operator:** Select an operator to indicate what you want to do with 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.



The screenshot shows the 'Add Prod Rest Rule Add' interface with the 'Products' tab selected. At the top, there are fields for Scenario Status (Pending), Scenario Type (User), Region Name (US), Effective Date (6/14/2022), End Date (1/27/2023), Processing Start Time, Processing End Time, and Sync End Time. Below these, a navigation bar has arrows pointing left and right, followed by 'Products' and 'Summary'. The 'Products' section contains a heading 'Products' with a camera icon, a 'Filters' button, and a dropdown menu. Two filter conditions are listed under 'AND':

- Type: Product, Attribute: Product Type, Operator: in, Value: Item
- Type: Product, Attribute: Product Type, Operator: in, Value: Brand

At the bottom right of the products section are 'Previous', 'Next' (which is highlighted with a red box), and 'Save' buttons.

- 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

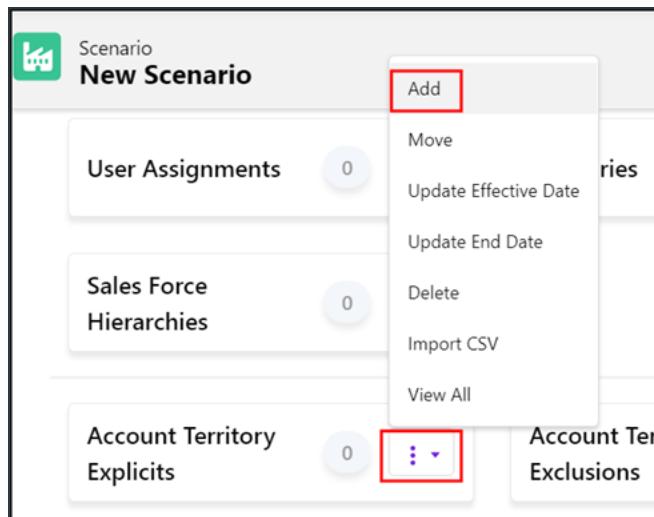
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you would like to add transactions to.

Scenarios											New	Export
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With	<input type="button"/>	Created By Me								
Scenario Name ↑	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name				
11 Margaret Knowles MSL	EU5NYCMW4512J36...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...					
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US				
13 New PC SF Gold & Silve	EOCQ8X4E48072TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...					
14 New Scenario	LY8PJWWQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US				
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...					
16 New Vaccine SF Engage	4MYHAS7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...					
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US				

20 Records

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.

Scenario New Scenario								New	Edit	Simulate	Commit	Copy	Delete	Map	Bulk Import			
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time											
Pending	User	US	7/21/2021	10/31/2021				Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
Account Territory Explicit								Add	Move	Update Effective Date	Update End Date	Delete	Import CSV	Export				
0 Records																		

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**.

Add Account to Territory

Accounts		To Territories		Selection	
Select the accounts you want to add:					
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With <input type="button"/>					
Account Name ↑	Account Integrat...	Account Type	Account Specialty	Account Address	Region Name
JUDE K. MIRI	PRGR05	INSTITUTION	PLASTIC SURGERY	Baltimore MD 21287	United States
<input type="checkbox"/> Johns Hopkins Hospital	ORG01	Institution	Emergency medical ser...	Baltimore MD 21287	East
<input type="checkbox"/> Johns Hopkins Hospital Car	ORG03	Department	Interventional cardiology	Baltimore MD 21287	East
<input type="checkbox"/> Johns Hopkins Hospital Ne	ORG04	Department	Neurology	Baltimore MD 21287	East
<input type="checkbox"/> Julie Marie Miller	PROF04	Missing	Obstetrics	Baltimore MD 21224	West
<input type="checkbox"/> Kelly Hartnett	PROF13	Medical Professional	Radiology	Baltimore MD 21287	United States
<input checked="" type="checkbox"/> Lewis Becker	PROF01	Medical Professional	Allergy	Baltimore MD 21287	United States
<input type="checkbox"/> Manisha Patel	PROF15	Medical Professional	Sports medicine	Baltimore MD 21287	United States
<input type="checkbox"/> Mari Louise Groves	PROF11	Medical Professional	Allergy	Baltimore MD 21287	Mexico
<input type="checkbox"/> Monica Wilson	PROF05	Business Contact	Ophthalmology	New York NY 21224	North America
<input type="checkbox"/> Peter's Robins	PROF14	Medical Professional	Rheumatology	Baltimore MD 21287	United States
<input type="checkbox"/> Robert Wood Johnson Hos.	ORG05	Department	Interventional cardiology	Somerville NJ 08876	United States
<input type="checkbox"/> Robert Wood Johnson Lini.	ORG07	Institution	Enilens	Somerville NJ 08876	United States
20 of 20 (3 selected)					
<input type="button"/> Cancel <input style="border: 2px solid red; padding: 2px 10px; margin-left: 10px;" type="button"/> Next					

- For **Account Territory Exclusions**, select the check boxes next to the accounts you would like to exclude from a territory, then click **Next**.

Account Exclusion By Territory Add

Accounts		To Territories		Selection	
Select the accounts you want to exclude:					
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With <input type="button"/>					
Account Name ↑	Account Integrat...	Account Type	Account Specialty	Account Address	
12 Mile Creek Family Me	WUSE00403605	Practice	Other specialty	COLUMBIA SC 29201	
<input type="checkbox"/> 125Th Street Clinic	WUSH00014300	Department	Other specialty	NEW YORK NY 10027, NEW YORK N	
<input checked="" type="checkbox"/> 125th Street Clinic	WUSE00716618	Practice	Other specialty	NORTH MIAMI FL 33161	
<input type="checkbox"/> 1488 Family Medicine Gr	WUSE00671754	Practice	Family medicine	CONROE TX 77384	
<input type="checkbox"/> 14th Medical Group	WUSE00202257	Practice	Family medicine	COLUMBUS MS 39710	
20+ Records					
<input type="button"/> Cancel <input style="border: 2px solid purple; padding: 2px 10px; margin-left: 10px;" type="button"/> 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.

Add Account Territory Owner Indicator

Territories/Accounts							Selections	
Select the territories/accounts for which you want to create account territory owner indicator records:								
Territories		Accounts						
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With <input type="button" value="▼"/>								
Territory Name	Territory Integr...	Territory Type	Sales Force Na...	User Name	Region Name	Effective D...	End Date	
Kentucky	TER42	District	U.S. SalesForce		United States	8/1/2014		
Louisiana	TER49	District	U.S. SalesForce		United States	8/1/2014		
MD Baltimore	TER440	Territory	Primary Care	Bill Rodriguez	United States	8/1/2014		
Maine	TER20	District	U.S. SalesForce	Bill Rodriguez	United States	8/1/2014		
Maryland	TER44	District	Neurology	Samantha Ohm	United States	8/1/2014		
Massachusetts	TER26	District	U.S. SalesForce		United States	8/1/2014		
Michigan	TER90	District	U.S. SalesForce		United States	8/1/2014		
Minnesota	TER94	District	U.S. SalesForce		United States	8/1/2014		
Mississippi	TER53	District	U.S. SalesForce		United States	8/1/2014		
Missouri	TER101	District	U.S. SalesForce		United States	8/1/2014		
Montana	TER80	District	U.S. SalesForce		United States	8/1/2014		
Mountain Ridge Territor	TER10012	Territory	Global SalesForce 1	Karl Thorne	United States	8/1/2014		
<input checked="" type="checkbox"/> Mountain Territory	TER10006	Territory	West SalesForce	Caroline Turing	United States	8/1/2014		
NJ 700	TER700	Territory	Primary Care		United States	1/1/2013		

Cancel

- 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**.

Account Exclusion By Sales Force Add

Accounts		To Sales Forces		Selection	
Select the accounts you want to exclude:					
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With <input type="button" value="▼"/>					
Account Name	Account Integr...	Account Type	Account Specialty	Account Address	
1 Community Medical Cl	WUSE00091052	Department	Other specialty	BALDWIN PARK CA 91706, LOS ANG	
1 World Medicine	WUSE00421772	Practice	Internal medicine - fa...	LAS VEGAS NV 89102	
<input checked="" type="checkbox"/> 10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine	LUTZ FL 33559	
10th Street Comprehensi	WUSE00677376	Practice	Addiction medicine	MILWAUKEE WI 53221	
112 Gvr Medical, Pc	WUSE00186864	Practice	Family medicine	FLUSHING NY 11355, FOREST HILLS	
10+ Records					

Cancel

- 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**.

Accounts	To Territories		
	Arkansas	Illinois	Kansas
Eric M. Jackson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Joe K. Ahn	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Lewis Becker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- For **Account Territory Exclusions**, select the check boxes next to the territories you would like to exclude accounts from, and then click **Next**.

Territory Name	Territory Integr...	Territory Type	Sales Force Name	User Name	Region
MSL Alabama	6CZV1TZK3Q0LMS7...	District	MSL	Eleanor Waller	US
MSL Alaska	J7FF4BES3QQLMS7GAY	District	MSL		US
<input checked="" type="checkbox"/> MSL Arizona	OXVV8DEZ3Q0LMS7...	District	MSL	Bert Huff	US

- 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**.

Add Account Territory Owner Indicator

Select the territories for which you want to create account territory owner indicator:

Account Name	Territory Name	Territory Integration Id	Effective Date	End Date
Lewis Becker	Mountain Territory	TER10006	8/1/2014	
Thomas Leopold	Mountain Territory	TER10006	8/1/2014	

2 of 2 (1 selected)

[Previous](#) [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.

Action	Account Name	Account Integration Id	Account Type	Territory Name	Territory Integration Id	Territory Type	Sales Force Name
1 Add	Thomas Leopold	PROF08	Medical Professional	Mountain Territory	TER10006	Territory	West SalesForce

1 of 1

[View All](#)

Overview

Accounts	Geographies	Territories
Account Territory Explicit	Geography Territories	Territories
Account Territory Exclusions	Rules	Territory Hierarchies
Account Sales Force Exclusions	Account Alignment Rules	Sales Forces
Account Territory Owner Indicator (3)	Account Product Restriction Rules	Sales Forces
Products	Engagement Plans	Sales Force Hierarchies
Product Explicit	Engagement Plans	Product Sales Forces
Product Exclusions		User Assignments
Product Sales Forces		User Assignments
Account Product Restriction Explicit		
Account Product Territory Restriction Explicit		

- For **Account Sales Force Exclusions**, select the check boxes next to the sales forces you would like to exclude accounts from, then click **Next**.

Account Exclusion By Sales Force Add

To Sales Forces Selection

Select the sales forces you want to exclude accounts from:

Sales Force Name	Sales Force ID	Type	Region Name	Effective Date	End Date
Institutional SF	TFDI09CD3OJ84UG0H5	Institutional	US	5/1/2021	
<input checked="" type="checkbox"/> MSL	Y6ZKSNK23OJ890GTHL	Retail	US	5/1/2021	
Neurology	PSTOAPZU3OJDAP4U...	Institutional	US	5/1/2021	
Neurology Institutional	K8YWJILFS3OJDKKEMU1	Institutional	US	5/1/2021	

8 Records

Previous Next

- 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.

Add Account to Territory

To Territories

Accounts	Territory
10 To 10 Urgent Care	<input checked="" type="checkbox"/> MSL Alabama
10th Street Comprehensive Treatment Center	<input type="checkbox"/>

Previous Save

- 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.

Account Exclusion By Territory Add

By checking the appropriate box, choose which account is excluded from which territory:

To Territories	
Accounts	MSL Arizona
125th Street Clinic	<input checked="" type="checkbox"/>

Previous
Save

- 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.

Account Exclusion By Sales Force Add

By checking the appropriate box, choose which account is excluded from which sales force:

To Sales Forces	
Accounts	MSL
10 To 10 Urgent Care	<input checked="" type="checkbox"/>

Previous
Save

7. Click **Save**.

The account territory explicit transactions are added to the **Account Territory Explicit** section on the **Accounts** tab and are indicated on the transaction card in the **Overview** section of the **Details** tab.

Account Territory Explicit								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	10 To 10 Urgent Care	WU000590470	Practice	MSL Alabama	6CZV1T2K3Q0LMS78...	District							
2	Add	10th Street Comprehensive	WU000677376	Practice	MSL Alabama	6CZV1T2K3Q0LMS78...	District							
2 Records														

The screenshot shows the 'Overview' section of the Details tab. The 'Accounts' section contains several items, with 'Account Territory Exclusions' highlighted by a red box and a blue circular badge indicating one item. Other items include 'Account Territory Explicit', 'Account Sales Force Exclusions', 'Account Territory Owner Indicator', 'Product Explicit', 'Product Exclusions', 'Product Sales Forces', 'Account Product Restriction Explicit', and 'Account Product Territory Restriction Explicit'. The 'Geographies' and 'Territories' sections show counts for various geographical entities and territories.

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.

Action	Account Name	Account Integr...	Account Type	Territory Name	Territory Integr...	Territory Type	Sales Fc
1 Add	125th Street Clinic	WUSe00716618	Practice	MSL Arizona	OXV8DEZ3Q0LMS7...	District	MSL

1 Records

The screenshot shows the 'Overview' section of the Details tab. The 'Accounts' section displays various transaction types, with 'Account Territory Exclusions' highlighted by a red box and a blue circular badge indicating one item. Other items include 'Account Territory Explicit', 'Account Sales Force Exclusions', 'Account Territory Owner Indicator', 'Product Explicit', 'Product Exclusions', 'Product Sales Forces', 'Account Product Restriction Explicit', and 'Account Product Territory Restriction Explicit'. The 'Geographies' and 'Territories' sections show counts for various geographical entities and territories.

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.

Account Sales Force Exclusions						Add	Move	Update Effective Date	Update End Date	Delete	Import CSV	Export
Action	Account Name	Account Integration Id	Account Type	Sales Force Name								
1 Add	10 To 10 Urgent Care	WUSE00590470	Practice	MSL								
1 Records												

Overview

The screenshot shows the OCI Overview page. It includes sections for Accounts, Geographies, Territories, Products, Rules, Sales Forces, Engagement Plans, and User Assignments. Under the 'Rules' section, 'Account Sales Force Exclusions' is highlighted with a red box.

Accounts	Geographies	Territories
Account Territory Explicit	Geography Territories	Territories
Account Territory Exclusions	Territory Hierarchies	Territory Hierarchies
Account Sales Force Exclusions		
Account Territory Owner Indicator		
Rules		
Account Alignment Rules		
Account Product Restriction Rules		
Sales Forces		
Sales Forces		
Sales Force Hierarchies		
Product Sales Forces		
Engagement Plans		
Engagement Plans		
User Assignments		
User Assignments		
Product Explicit		
Product Exclusions		
Product Sales Forces		
Account Product Restriction Explicit		
Account Product Territory Restriction Explicit		

Add a Geography Alignment Transaction to a Scenario

After you create a scenario, you can add transactions to it.

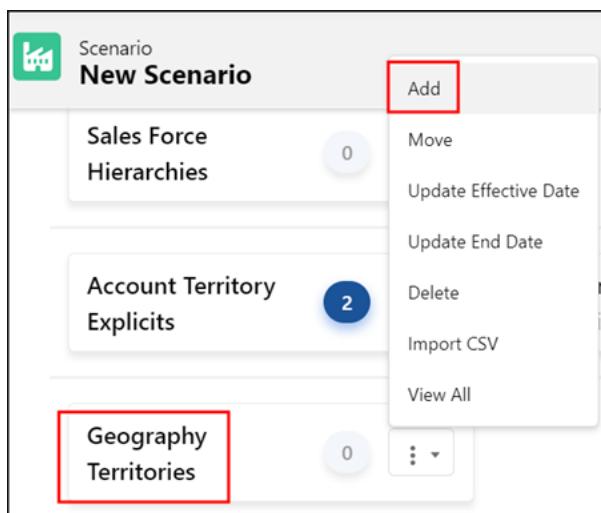
To add a geography alignment transaction to a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.

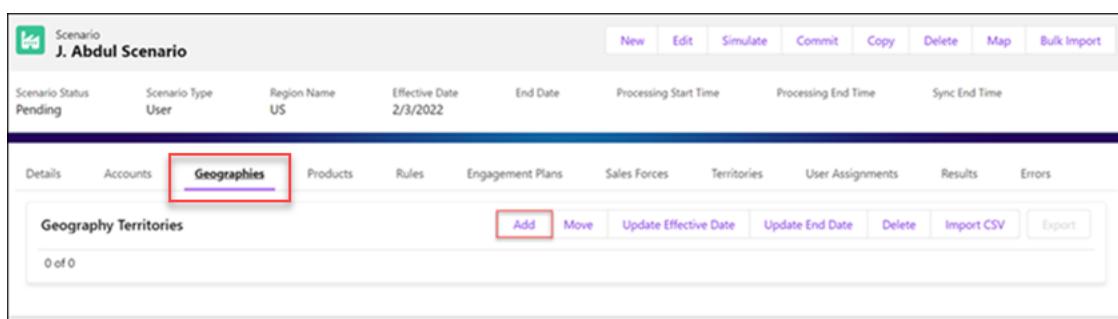
Scenarios											New	Export
	Scenario Name	Scenario Integrat...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name			
11	Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...				
12	New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US			
13	New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...				
14	New Scenario	LY8PJWVQ4BHIIQFEL...	Pending	User	7/21/2021	10/31/2021			US			
15	New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...				
16	New Vaccine SF Engage	4MYHAS7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...				
17	New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US			
20 Records												

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.



- Select the check boxes next to the geographies you want to add to a territory, then click **Next**.

Add Geography to Territory

Geographies To Territories Selection

Select the geographies you want to add:

Geography Name ↑	Geography Integration Id	Geography Type	Geography Code	City
<input type="checkbox"/> POST-00157	9600500000029191	Postal Code	00157	NA
<input type="checkbox"/> POST-00158	9600500000029193	Postal Code	00158	NA
<input checked="" type="checkbox"/> POST-01000	9600500000029797	Postal Code	01000	AMHERST
<input type="checkbox"/> POST-01001	9600500000029799	Postal Code	01001	AGAWAM
<input type="checkbox"/> POST-01002	9600500000029801	Postal Code	01002	AMHERST

10+ Records

Cancel 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.

Add Geography to Territory

✓ To Territories Selection

Select the territories you want to add geographies to:

Existing New

Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name
<input type="checkbox"/> Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Seif
<input type="checkbox"/> Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales	Babs Steu
<input checked="" type="checkbox"/> Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Alisun Ol

10+ Records

Previous Next

- Choose which geography is added to which territory by selecting the appropriate check box for the geography under the appropriate territory, then click **Save**.

Add Geography to Territory

To Territories	
Geographies	<input checked="" type="checkbox"/> Delaware - Diabetes Sales
POST-01000	<input checked="" type="checkbox"/>

Previous 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.

Action	Geography Name	Geography Integ ID	Geography Type	Territory Name	Territory Integr ID	Territory Type	Sales Fc
1 Add	POST-00001	130003832896	Postal Code	MSL Arizona	OXVV8DEZ3QOLMS7...	District	MSL

1 Records

Geography Territories 1 ...

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

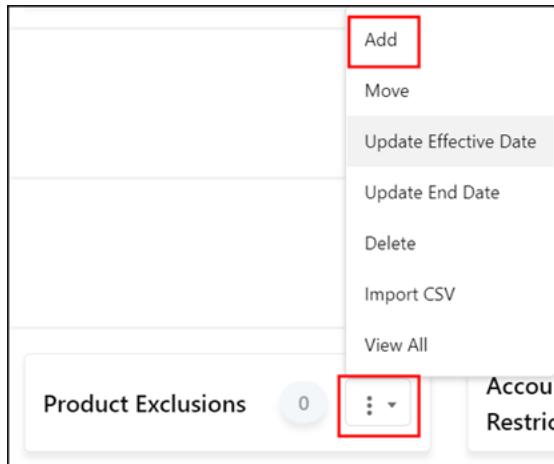
- Click **Scenarios** from the primary navigation bar.
- From the Scenarios screen, select the scenario you want to add transactions to.

Scenarios											New	Export			
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With	<input type="button"/>	Created By Me											
Scenario Name ↑	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name							
11 Margaret Knowles MSL	EU5NYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...	6/30/2021, 0...	US							
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US							
13 New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	US							
14 New Scenario	LY8PJWVQ4BHQQFEL...	Pending	User	7/21/2021	10/31/2021			US							
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	US							
16 New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US							
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US							

20 Records

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.

Scenario New Scenario								New	Edit	Simulate	Commit	Copy	Delete	Map	Bulk Import			
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time											
Pending	User	US	7/21/2021	10/31/2021				Details	Accounts	Geographies	Products (highlighted with a red box)	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
Product Explicit								Add (highlighted with a red box)	Move	Update Effective Date	Update End Date	Delete	Import CSV	Export				
0 Records																		

- 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**.

Add Product Exclusion to Territory

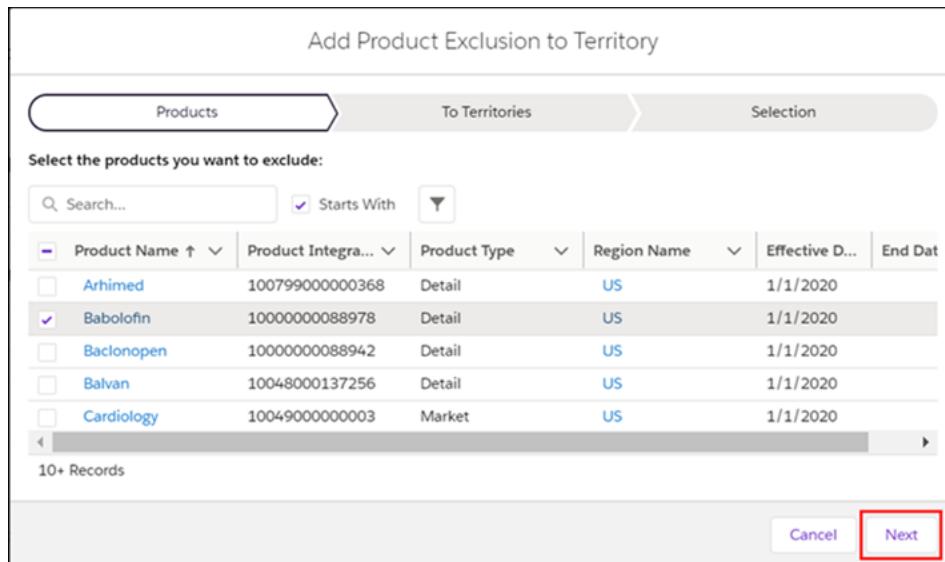
Products To Territories Selection

Select the products you want to exclude:

Product Name ↑	Product Integra... ↓	Product Type	Region Name	Effective D...	End Dat
Arhimed	100799000000368	Detail	US	1/1/2020	
<input checked="" type="checkbox"/> Babolofin	10000000088978	Detail	US	1/1/2020	
Baconopen	10000000088942	Detail	US	1/1/2020	
Balvan	10048000137256	Detail	US	1/1/2020	
Cardiology	10049000000003	Market	US	1/1/2020	

10+ Records

Cancel Next



- **For Product Explicits**, select the check boxes next to the products you want to add to a territory, and then click **Next**.

Add Product to Territory

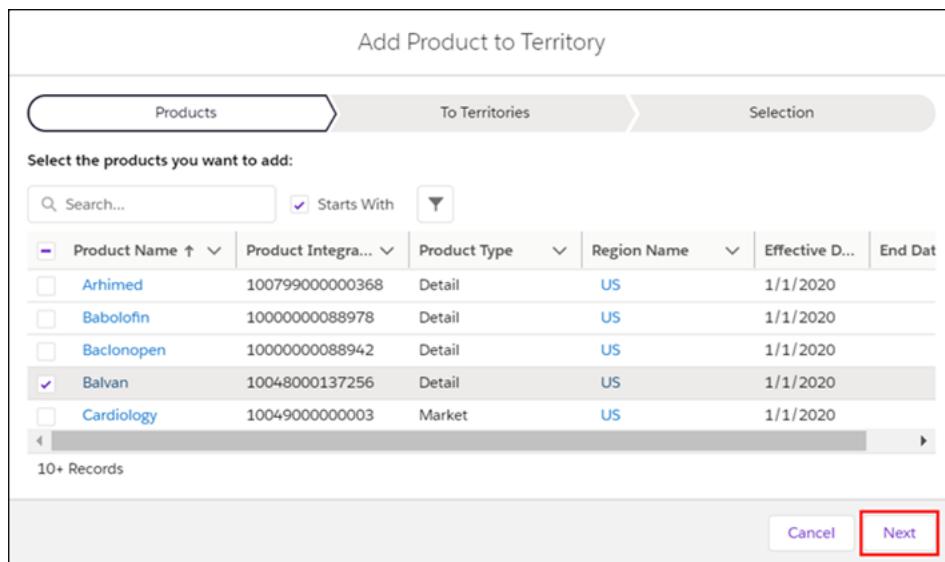
Products To Territories Selection

Select the products you want to add:

Product Name ↑	Product Integra... ↓	Product Type	Region Name	Effective D...	End Dat
Arhimed	100799000000368	Detail	US	1/1/2020	
<input type="checkbox"/> Babolofin	10000000088978	Detail	US	1/1/2020	
Baconopen	10000000088942	Detail	US	1/1/2020	
<input checked="" type="checkbox"/> Balvan	10048000137256	Detail	US	1/1/2020	
Cardiology	10049000000003	Market	US	1/1/2020	

10+ Records

Cancel 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**.

Add Product to Sales Force

Products To Sales Forces Selection

Select the products you want to add:

	Product Name ↑	Product Integra...	Product Type	Region Name	Effective D...	End Dat...
<input checked="" type="checkbox"/>	Arhimed	100799000000368	Detail	US	1/1/2020	
<input type="checkbox"/>	Babolofin	10000000088978	Detail	US	1/1/2020	
<input type="checkbox"/>	Baclonopen	10000000088942	Detail	US	1/1/2020	
<input type="checkbox"/>	Balvan	10048000137256	Detail	US	1/1/2020	
<input type="checkbox"/>	Cardiology	10049000000003	Market	US	1/1/2020	

10+ Records

Cancel Next

- For **Account Product Restriction Explicits**, select the check boxes next to the accounts you want to restrict products from, and then click **Next**.

Add Account to Product

Accounts To Products Selection

Select the accounts you want to add:

	Account Name ↑	Account Integr...	Account Type	Account Specialty	Account Address
<input type="checkbox"/>	1 Community Medical Cl	WUSE00091052	Department	Other specialty	BALDWIN PARK CA 91706, LOS ANG
<input type="checkbox"/>	1 World Medicine	WUSE00421772	Practice	Internal medicine - fa...	LAS VEGAS NV 89102
<input checked="" type="checkbox"/>	10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine	LUTZ FL 33559
<input type="checkbox"/>	10th Street Comprehensi	WUSE00677376	Practice	Addiction medicine	MILWAUKEE WI 53221
<input type="checkbox"/>	112 Gvr Medical, Pc	WUSE00186864	Practice	Family medicine	FLUSHING NY 11355, FOREST HILLS

10+ Records

Cancel 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**.

Add Account Product Territory Restriction

Accounts	Territories	Selection																														
Select the accounts to add a restriction for: <div style="display: flex; justify-content: space-between; align-items: center;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 5px; margin-right: 10px;" type="text"/> Search... <input checked="" type="checkbox"/> Starts With Filter </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="background-color: #e0e0e0;">Account Name ↑</th> <th style="background-color: #e0e0e0;">Account Integr...</th> <th style="background-color: #e0e0e0;">Account Type</th> <th style="background-color: #e0e0e0;">Account Specialty</th> <th style="background-color: #e0e0e0;">Account Address</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/> 1 Community Medical Cl</td><td>WUSE00091052</td><td>Department</td><td>Other specialty</td><td>BALDWIN PARK CA 91706, LOS ANGELES CA 90001</td></tr> <tr><td><input type="checkbox"/> 1 World Medicine</td><td>WUSE00421772</td><td>Practice</td><td>Internal medicine - family medicine</td><td>LAS VEGAS NV 89102</td></tr> <tr><td><input type="checkbox"/> 10 To 10 Urgent Care</td><td>WUSE00590470</td><td>Practice</td><td>Emergency medicine</td><td>LUTZ FL 33559</td></tr> <tr><td><input type="checkbox"/> 10th Street Comprehensive</td><td>WUSE00677376</td><td>Practice</td><td>Addiction medicine</td><td>MILWAUKEE WI 53221</td></tr> <tr><td><input type="checkbox"/> 112 Gvr Medical, Pc</td><td>WUSE00186864</td><td>Practice</td><td>Family medicine</td><td>FLUSHING NY 11355, FOREST HILLS QUEENS NY 11355</td></tr> </tbody> </table> <p style="margin-top: 5px;">20+ Records</p>			Account Name ↑	Account Integr...	Account Type	Account Specialty	Account Address	<input checked="" type="checkbox"/> 1 Community Medical Cl	WUSE00091052	Department	Other specialty	BALDWIN PARK CA 91706, LOS ANGELES CA 90001	<input type="checkbox"/> 1 World Medicine	WUSE00421772	Practice	Internal medicine - family medicine	LAS VEGAS NV 89102	<input type="checkbox"/> 10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine	LUTZ FL 33559	<input type="checkbox"/> 10th Street Comprehensive	WUSE00677376	Practice	Addiction medicine	MILWAUKEE WI 53221	<input type="checkbox"/> 112 Gvr Medical, Pc	WUSE00186864	Practice	Family medicine	FLUSHING NY 11355, FOREST HILLS QUEENS NY 11355
Account Name ↑	Account Integr...	Account Type	Account Specialty	Account Address																												
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<input type="checkbox"/> 10th Street Comprehensive	WUSE00677376	Practice	Addiction medicine	MILWAUKEE WI 53221																												
<input type="checkbox"/> 112 Gvr Medical, Pc	WUSE00186864	Practice	Family medicine	FLUSHING NY 11355, FOREST HILLS QUEENS NY 11355																												
<input type="button" value="Cancel"/> <input type="button" value="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**.

Add Product Exclusion to Territory

Existing	New	To Territories	Selection																								
Select the territories you want to exclude products from: <div style="display: flex; justify-content: space-between; align-items: center;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; padding: 5px; margin-right: 10px;" type="text"/> Search... <input checked="" type="checkbox"/> Starts With Filter </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="background-color: #e0e0e0;">Territory Name ↑</th> <th style="background-color: #e0e0e0;">Territory Integr...</th> <th style="background-color: #e0e0e0;">Territory Type</th> <th style="background-color: #e0e0e0;">Sales Force Name</th> <th style="background-color: #e0e0e0;">User Name</th> <th style="background-color: #e0e0e0;">Region N</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/> MSL Alabama</td><td>6CZV1TJK3Q0LMS78...</td><td>District</td><td>MSL</td><td>Eleanor Waller</td><td>US</td></tr> <tr><td><input type="checkbox"/> MSL Alaska</td><td>J7FF4BES3Q0LMS7GAY</td><td>District</td><td>MSL</td><td></td><td>US</td></tr> <tr><td><input type="checkbox"/> MSL Arizona</td><td>OXVV8DEZ3Q0LMS7...</td><td>District</td><td>MSL</td><td>Bert Huff</td><td>US</td></tr> </tbody> </table> <p style="margin-top: 5px;">10+ Records</p>				Territory Name ↑	Territory Integr...	Territory Type	Sales Force Name	User Name	Region N	<input checked="" type="checkbox"/> MSL Alabama	6CZV1TJK3Q0LMS78...	District	MSL	Eleanor Waller	US	<input type="checkbox"/> MSL Alaska	J7FF4BES3Q0LMS7GAY	District	MSL		US	<input type="checkbox"/> MSL Arizona	OXVV8DEZ3Q0LMS7...	District	MSL	Bert Huff	US
Territory Name ↑	Territory Integr...	Territory Type	Sales Force Name	User Name	Region N																						
<input checked="" type="checkbox"/> MSL Alabama	6CZV1TJK3Q0LMS78...	District	MSL	Eleanor Waller	US																						
<input type="checkbox"/> MSL Alaska	J7FF4BES3Q0LMS7GAY	District	MSL		US																						
<input type="checkbox"/> MSL Arizona	OXVV8DEZ3Q0LMS7...	District	MSL	Bert Huff	US																						
<input type="button" value="Previous"/> <input style="border: 2px solid red;" type="button" value="Next"/>																											

- **For Product Explicits**, select the check boxes next to the territories you want to add products to, and then click **Next**.

Add Product to Territory

Select the territories you want to add products to:

Existing New

	Territory Name ↑	Territory Integr...	Territory Type	Sales Force Name	User Name	Region N
<input type="checkbox"/>	MSL Alabama	6CZV1TZX3Q0LMS78...	District	MSL	Eleanor Waller	US
<input checked="" type="checkbox"/>	MSL Alaska	J7FF4BES3Q0LMS7GAY	District	MSL		US
<input type="checkbox"/>	MSL Arizona	OXVV8DEZ3Q0LMS7...	District	MSL	Bert Huff	US

10+ Records

Previous Next

- **For Product Sales Forces**, select the check boxes next to the sales forces you want to add products to, and then click **Next**.

Add Product to Sales Force

Select the sales forces you want to add products to:

Existing New

	Sales Force Na...	Sales Force Inte...	Sales Force Type	Region Name	Effective Date	End Date
<input type="checkbox"/>	Institutional SF	TFDI09CD3OJ84UG0H5	Institutional	US	5/1/2021	
<input type="checkbox"/>	MSL	Y6ZKSNK23OJ890GTHL	Retail	US	5/1/2021	
<input checked="" type="checkbox"/>	Neurology	PSTOAPZU3OJDAP4U...	Institutional	US	5/1/2021	
<input type="checkbox"/>	Neuroloav Institutional	K8YWJIF53OJDKKEMU1	Institutional	US	5/1/2021	

8 Records

Previous Next

- **For Account Product Restriction Explicits**, select the check boxes next to the products you want to add accounts to, and then click **Next**.

Add Account to Product

To Products Selection

Select the products you want to add accounts to:

Product Name	Product Integrat...	Product Type	Region Name	Effective Date	End Date
Arhimed	100799000000368	Detail	US	1/1/2020	
Babolofin	10000000088978	Detail	US	1/1/2020	
Baconopen	10000000088942	Detail	US	1/1/2020	
<input checked="" type="checkbox"/> Balvan	10048000137256	Detail	US	1/1/2020	
Cardiology	10049000000003	Market	US	1/1/2020	
Cardionano	16474000000112	Brand	IIS	1/1/2020	
10+ Records					
Previous 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**.

Add Account Product Territory Restriction

Territories Selection

Select the territories to add a restriction for:

Existing New

Territory Name	Territory Integrat...	Territory Type	Sales Force Name	User Name	Region N
MSL DIST of Columbia	SXMC7SFJ3Q0LMS8I...	District	MSL	MSL	US
MSL Delaware	II8YIXQK3Q0LMS8IW1	District	MSL	MSL	US
<input checked="" type="checkbox"/> MSL East North Central	QRFPACHD3Q0LMS8...	Area	MSL	Angelica Bennett	US
20+ Records					
Previous 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.

Add Product Exclusion to Territory

By checking the appropriate box, choose which product is excluded from which territory:

* Product Alignment Type

To Territories	
Products	<input checked="" type="checkbox"/> MSL Alabama
Babolofin	<input checked="" type="checkbox"/>

[Previous](#) Save

- **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.

Add Product to Territory

By checking the appropriate box, choose which product is added to which territory:

* Product Alignment Type

To Territories	
Products	<input checked="" type="checkbox"/> MSL Alaska
Balvan	<input checked="" type="checkbox"/>

[Previous](#) Save

- **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.

Add Product to Sales Force

By checking the appropriate box, choose which product is added to which sales force:

*Product Alignment Type

Sales

To Sales Forces	
Products	Neurology <input checked="" type="checkbox"/>
Arhimed	<input checked="" type="checkbox"/>

[Previous](#) Save

- **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.

Add Account to Product

By checking the appropriate box, choose which account is added to which product:

To Products	
Accounts	Balvan <input checked="" type="checkbox"/>
10 To 10 Urgent Care	<input checked="" type="checkbox"/>

[Previous](#) Save

- **For Account Product Territory Restriction Explicits**, choose products and then choose which accounts and territories those products are restricted for.

Add Account Product Territory Restriction

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 Explicit**s 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.

Product Sales Forces							Product Sales Forces	
Action	Product Name	Product Integrat...	Product Type	Product Alignm...	Sales Force Name	Sales Force Inte...	Sales Fc	
1 Add	Ahmed	100799000000368	Detail	Sales	Neurology	PSTOAPZU30/DAP4U...	Instituti	
1 Records								

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.

Account Product Restriction Explicits							Account Product Restriction Explicits	
Action	Account Name	Account Integrat...	Account Type	Product Name	Product Integrat...	Product Type		
1 Add	10 To 10 Urgent Care	WUSE00590470	Practice	Balvan	10048000137256	Detail		
1 Records								

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.

Account Product Territory Restriction Explicits								Account Product Territory Restriction Explicits	
Action	Account Name	Account Integrat...	Account Type	Product Name	Product Integrat...	Product Type	Territor		
1 Add	1 Community Medical	WUSE00091052	Department	Babolofin	10000000088978	Detail	MSL Ear		
1 Records									

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

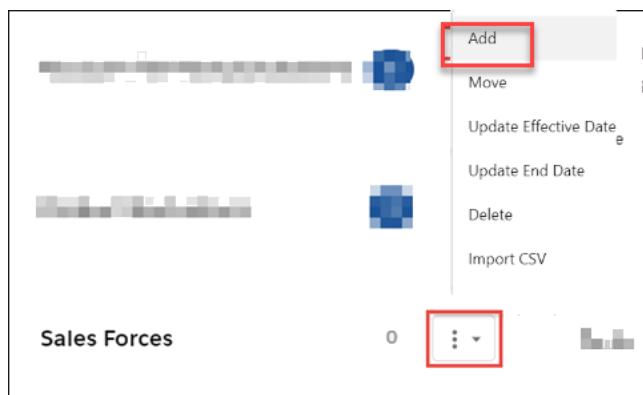
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.

Scenarios											New	Export
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With	<input type="button"/>	Created By Me								
Scenario Name ↑	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name				
11 Margaret Knowles MSL	EU5NYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...						
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US				
13 New PC SF Gold & Silve	EOCQ8X4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...					
14 New Scenario	LY8PJWWQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US				
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...					
16 New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...					
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US				

20 Records

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.

Scenario New Scenario								New	Edit	Simulate	Commit	Delete	Map	Bulk Import
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time							
Error	User	US	2/2/2022		2/3/2022, 8:46:44 AM			Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces
Sales Forces								Add	Edit	Update Effective Date	Update End Date	Delete	Import CSV	Export
0 of 0														

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](#)

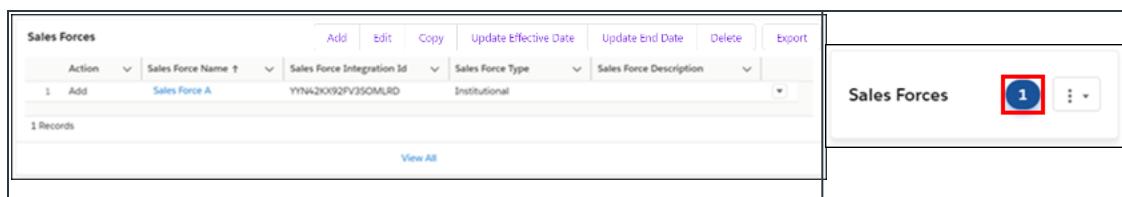
- **For Sales Forces**, enter details of the sales force, and then click **Save**.

The screenshot shows the 'Sales Force Add' dialog box. It has two main sections: 'Information' and 'External IDs'. In the 'Information' section, there are fields for 'Sales Force Name' (with a value of '6PQ4E7D161XFZ31O21'), 'Sales Force Type' (set to 'Select an Option'), 'Region' (with a search bar and a magnifying glass icon), 'Sales Force Description', 'Alignment Limited To Region' (unchecked), and 'Manage Geography As Unique' (set to 'No check'). In the 'External IDs' section, there are four fields labeled 'External ID1', 'External ID2', 'External ID3', and 'External ID4', each with a corresponding input field. At the bottom right of the dialog box are three buttons: 'Cancel', 'Save & New' (highlighted in purple), and '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.

Add Child Sales Force to Parent Sales Force

Sales Force Parent Sales Forces Selection

Select the child sales forces you want to add:

Existing New

<input type="checkbox"/>	Sales Force Name ↑	Sales Force Integration Id	Sales Force Type	Region Name	
<input type="checkbox"/>	Diabetes and Oncology	10000000088200	Retail	US	[...]
<input checked="" type="checkbox"/>	Diabetes Sales	10000000087424	Retail	US	[...]
<input type="checkbox"/>	Oncology Sales	10000000087264	Institutional	US	[...]

3 Records

Cancel Next

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**.

Add Child Sales Force to Parent Sales Force

✓ Parent Sales Forces Selection

Select the parent sales forces you want to add child sales forces to:

Existing New

<input type="checkbox"/>	Sales Force Name ↑	Sales Force Integration Id	Sales Force Type	Region Name	Effective D
<input checked="" type="checkbox"/>	Diabetes and Oncology	10000000088200	Retail	US	1/1/2020
<input type="checkbox"/>	Diabetes Sales	10000000087424	Retail	US	1/1/2020
<input type="checkbox"/>	Oncology Sales	10000000087264	Institutional	US	1/1/2020

3 Records

Previous 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.

Add Child Sales Force to Parent Sales Force

By checking the appropriate box, choose which child sales force is added to which parent sales force:

Parent Sales Forces	
Sales Force	<input checked="" type="checkbox"/> Diabetes and Oncology
Diabetes Sales	<input checked="" type="checkbox"/>

[Previous](#) Save

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.

Sales Force Hierarchies						Add	Update Effective Date	Update End Date	Delete	Import CSV	Export	
Action	Parent Sales Force Name	Parent Sales Force Integration Id	Parent Sales Force Type	Child Sales Force Name	Child Sales Force Integration Id							
1	Add	Diabetes and Oncology	10000000088200	Retail	Diabetes Sales	100000000872						
< 1 Records												
View All												

Sales Force Hierarchies

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

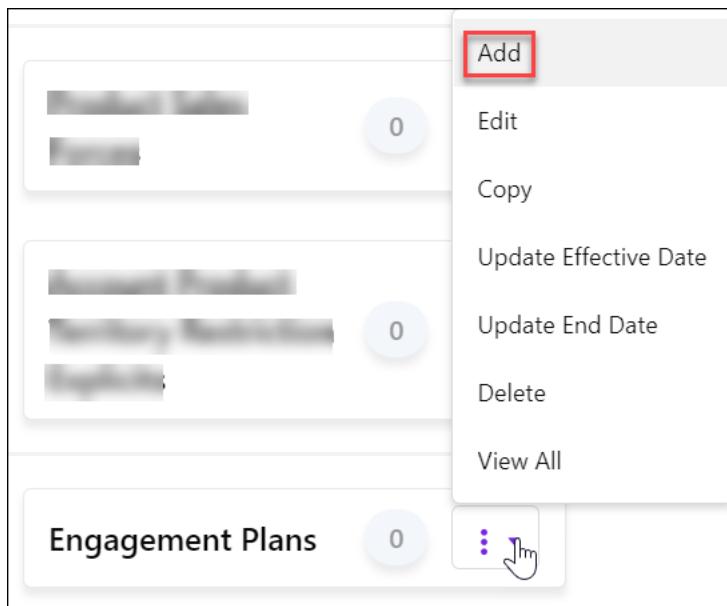
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.

										New	Export
18	NC Engagement Plan	JV41H0TK4OPAACN1...	Pending	User	9/2/2021	9/30/2021	9/2/2021, 01...	9/2/2021, 01...	North America		
19	New Scenario	Q3GMA5RO2GP9OLP...	Committed	User	12/15/2020	12/31/2020	12/15/2020, ...	12/15/2020, ...			
20	NJ Engagement Plan	JBMNNGIRU4QI7TMZ...	Simulated	User	9/10/2021	9/30/2021	9/8/2021, 01...	9/8/2021, 02...	North America		
21	OBGYN APR	M622RZKS2DF4Q7I6...	Committed	User	12/4/2020		12/4/2020, 0...	12/4/2020, 0...	US		
22	RJC Scenario	75Z1XMFH2CTKH4L4...	Committed	User	12/2/2020		12/2/2020, 0...	12/2/2020, 0...	US		
23	Sales User Assignment	O2I6AFC22CS1P10AJD	Pending	User	12/2/2020				US		
24	SC Scenario	4AEMDIIC2EKIK1DZM1	Committed	User	12/8/2020		12/8/2020, 0...	12/8/2020, 0...	US		
25	Test	QZSODE7I28EY8W4Q...	Committed	User	11/18/2020		11/18/2020, ...	11/18/2020, ...			
26	Test Engagement Plan	XGE5UR9P4OMJXD0...	Error	User	9/2/2021	9/30/2021	9/2/2021, 07...		North America		
27	TestHE	UATQAF662GQKWYN...	Committed	User	12/15/2020	12/31/2020	12/15/2020, ...	12/15/2020, ...			
28	Vaccine Sales	LLNYW74Q28PTEA56...	Pending	User	11/12/2020						
29	XYZ Engagement Plan	8VH137RC4QTCHVX3...	Pending	User	9/13/2021	9/30/2021			US		

29 Records

3. Do one of the following:

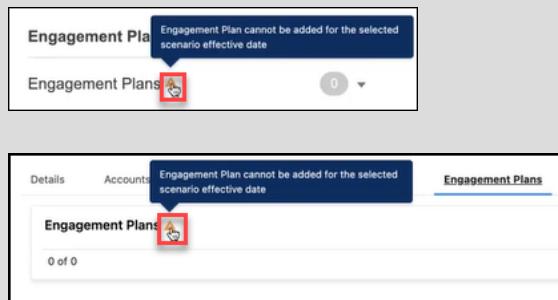
- From the **Details** tab, scroll down to the **Overview** section, click the drop-down  for the transaction you want to add to the scenario, then select **Add**.



- From the **Engagement Plans** tab, click **Add**.

A screenshot of a software interface titled 'Engagement Plans'. The tab bar at the top includes 'Details', 'Accounts', 'Geographies', 'Products', 'Rules', 'Engagement Plans' (which is underlined in purple), 'Sales Forces', 'Territories', 'User Assignments', 'Results', and 'Errors'. Below the tab bar, there's a section titled 'Engagement Plans' with a sub-section '0 Records'. A horizontal toolbar below this contains buttons for 'Add' (highlighted with a red box), 'Edit', 'Copy', 'Update Effective Date', 'Update End Date', 'Delete', and 'Export'.

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.



- Enter details of the engagement plan, then click **Next**.

A screenshot of the 'Add Engagement Plan' form. The top navigation bar has tabs for 'Details' (underlined in purple), 'Channels', 'Segment 1', and 'Summary'. The 'Details' tab is active. The form fields include:

- Information** section: 'Engagement Plan Name' (Oct2022 Engagement Plan), 'Engagement Plan Description' (empty), 'Working Days' (19), 'Minimum Call Rate' (empty), 'Engagement Plan Integration Id' (CG08SNVCS3CEIWAPIX), 'Sales Force' (Neurology), 'Target Call Rate' (6), and 'Maximum Call Rate' (empty).
- External IDs** section: 'External ID1' (empty).

 At the bottom, there are buttons for 'Calendar', 'Delete Segment', 'Add Segment', 'Cancel', 'Next' (highlighted with a red box), and 'Save'.

- 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.

Company Holidays	
Date	Company Holiday Name
1 11/11/2021	Veteran's Day
2 11/25/2021	Thanksgiving
3 12/25/2021	Christmas

- **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**.

The screenshot shows the 'Add Engagement Plan' interface. At the top, there's a navigation bar with tabs: 'Enter engagement plan channels' (selected), 'Channels', 'Segment 1', and 'Summary'. Below the tabs is a table titled 'Enter engagement plan channels' with columns 'Channel Name' and 'Weight(%)'. Three rows are listed: 'Email' with weight 50%, 'Face to Face' with weight 25%, and 'Meeting' with weight 25%. Each row has a delete icon (trash can) to its right. At the bottom left is a 'Add Channel' button. At the bottom right are buttons for 'Previous', 'Next' (which is highlighted with a red box), and 'Save'.

- **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**.

The screenshot shows the 'Add Engagement Plan' interface. At the top, there's a navigation bar with arrows pointing left and right, and tabs labeled 'Segment 1' and 'Summary'. Below the navigation bar, there are several input fields:

- Segment Name:** Gold
- Rank:** 1
- Segment Description:** Account Rule Name: October rule
- Channel Name:** Face to Face
- Frequency Target:** 100

At the bottom of the screen, there are buttons for 'Calendar', 'Delete Segment', and 'Add Segment'. On the right side, there are buttons for 'Previous', 'Next' (which is highlighted with a red border), and 'Save'.

- **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.

The screenshot shows the 'Add Engagement Plan' interface. The 'Summary' tab is active. In the 'Details' section, the engagement plan name is 'Oct2022 Engagement Plan' and its integration ID is 'CG0BSNVC53CE/WAPIX'. The sales force is 'Neurology'. Under 'Calculation Details', working days are set to 19, target call rate is 6, and minimum and maximum call rates are also present. The 'Segments' section shows two segments. At the bottom, there are buttons for 'Calendar', 'Delete Segment', 'Add Segment', 'Previous', and a highlighted 'Save' button.

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

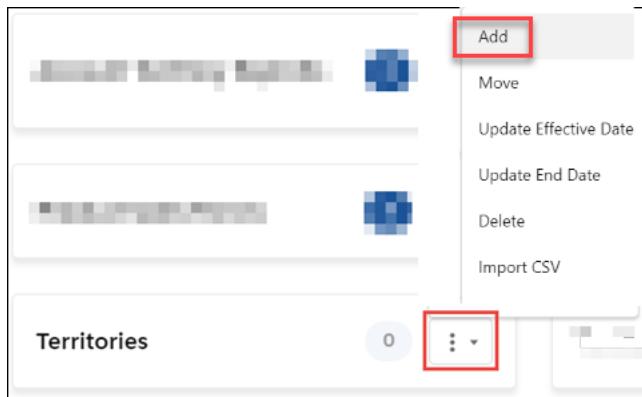
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario you want to add transactions to.

Scenarios										New	Export
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With	<input type="button"/>	Created By Me							
Scenario Name ↑	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name	Region Name		
11 Margaret Knowles MSL	EU5NYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...					
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US	US		
13 New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...				
14 New Scenario	LY8PJWWQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US	US		
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...				
16 New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...				
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US	US		

20 Records

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.

Scenario Aaron Newcomb Sales								New	Edit	Simulate	Commit	Copy	Delete	Map	Bulk Import
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time								
Pending	User	US	12/9/2020												
								Details	Accounts	Geographies	Products	Rules	Sales Forces	Territories	User Assignments
														Edit	Update Effective Date
														Update End Date	Delete
														Import CSV	Export
Territories								Add							
0 Records															

4. Depending on which territories transaction you selected, do one of the following:

- For **Territories**, enter details of the territory, and then click **Save**.

The screenshot shows the 'Territory Add' dialog box. It has two main sections: 'Information' and 'Address'. In the 'Information' section, there are fields for Territory Name (4884 District), Territory Type (District), Territory Integration Id (00RN8AU22FVG8ODO49), Short Name, Region (US), and Sales Force (Diabetes Sales). In the 'Address' section, there are fields for Address Line 1, Address Line 2, Address Line 3, City, State, and Zip Code. At the bottom right of the dialog box, there are three buttons: 'Cancel', 'Save & New', and 'Save', with 'Save' being highlighted by a red box.

- **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.

A screenshot of the Territories tab in a software application. The table has columns: Action, Territory Name, Territory Integration Id, Territory Type, Sales Force Name, and Sales Force Integration Id. One row is visible: 'Add' under Action, '4884 District' under Territory Name, '00RN6AU22FVG800049' under Territory Integration Id, 'District' under Territory Type, 'Diabetes Sales' under Sales Force Name, and '10000000087424' under Sales Force Integration Id. A red box highlights the number '1' in a small box next to the Territories tab title, indicating one record has been added.

- 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.

A screenshot of the 'Add Child Territory to Parent Territory' dialog box. It has tabs for 'Child Territories' (selected), 'Parent Territories', and 'Selection'. Below the tabs, it says 'Select the child territories:'. There are 'Existing' and 'New' tabs, with 'Existing' selected. A search bar and a 'Starts With' checkbox are present. A table lists territories: 'New Hampshire - Diabetes Sales' (selected), 'Connecticut - Diabetes Sales', and 'Connecticut - Oncology Sales'. A red box highlights the 'Next' button at the bottom right of the dialog.

Territory Name	Territory Integration Id	Territory Type	Sales Force Name
New Hampshire - Diabetes Sales	N7044VXR2GEAOWK3Y1	Territory	Diabetes Sales
Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales
Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales

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**.

Add Child Territory to Parent Territory

Select the parent territories:

Existing New

	Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name
<input checked="" type="checkbox"/>	Eastern Coast - Diabetes Sales	K0VQWLS62GEE5E9UEX	District	Diabetes Sales
<input type="checkbox"/>	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales
<input type="checkbox"/>	Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales

21+ Records

Previous Next

- 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.

Add Child Territory to Parent Territory

Select child territories from rows and assign to parent territories listed as top row heading:

Parent Territories	
Child Territories	<input checked="" type="checkbox"/> Eastern Coast - Diabetes Sales
New Hampshire - Diabetes Sales	<input checked="" type="checkbox"/>

Previous Save

- 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.

Territory Hierarchies							Export
Action	Parent Territory Name	Parent Territory Integration Id	Parent Territory Type	Child Territory Name			
1 Add	Eastern Coast - Diabetes Sales	K0VQWL562GEES5UEX	District	New Hampshire - Diabetes Sales			
1 Records							
View All							

Territory
Hierarchies 1

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.

Scenarios										New
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With <input type="button"/> Created By Me <input type="button"/>										
Scenario Na...	Scenario Integ...	Scenario Status	Scenario Type	Effective D...	End Date	Proces...	Proces...	Regi...		
1 	JCH2YA2C8WAQ1L...	Pending	User	1/10/2023						
2 ABC	VNQ095498WAGR7...	Committed	User	1/8/2023		1/10/2023, 1...	1/10/2023, 1...			

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**

Move User to Territory

Scenario Status Pending	Scenario Type User	Region Name	Effective Date 1/10/2023	End Date	Processing Start Time	Processing End Time	Syn...
----------------------------	-----------------------	-------------	-----------------------------	----------	-----------------------	---------------------	--------

From Territories/Users User Assignments To Users Selection

Select the territories/users you want to move from:

Territories **Users**

<input type="checkbox"/> Territory Name ↑	<input type="checkbox"/> Territory Integr...	<input type="checkbox"/> Territory Type	<input type="checkbox"/> Sales Force Na...	<input type="checkbox"/> User Name	<input type="checkbox"/> Region Name	<input type="checkbox"/> Effective D...	<input type="checkbox"/> End Date
<input type="checkbox"/> MSL Arizona	OXVV8DEZ3Q0LMS...	District	MSL	Bert Huff	US	5/1/2022	
<input type="checkbox"/> MSL California	HUIBZIDI3Q0LMS83...	District	MSL	Clara Bowers	US	5/1/2022	
<input type="checkbox"/> MSL East North Central	QRFPACHD3Q0LMS...	Area	MSL	Angelica Bennett	US	5/1/2022	
<input checked="" type="checkbox"/> MSL Indiana	EV6WY04O3Q0LMS...	District	MSL	Debbie Wheeler	US	5/1/2022	
<input type="checkbox"/> MSL Indiana	6ZR2X0043Q0LMSA...	District	MSL	Douglas Hayes	US	5/1/2022	
<input type="checkbox"/> MSL Massachusetts	BKBQ39J63Q0LMSA...	District	MSL	Grady King	US	5/1/2022	

6. The User Assignments step shows the current user assignment(s) for the territory. Select the user and click **Next**.

Move User to Territory

Scenario Status Pending	Scenario Type User	Region Name	Effective Date 1/10/2023	End Date	Processing Start Time	Processing End Time	Syn...
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From Territories User Assignments To Users Selection

Select the appropriate current user assignments:

<input type="checkbox"/> User Name	<input type="checkbox"/> User Integration Id	<input type="checkbox"/> User Type	<input type="checkbox"/> Effective Date	<input type="checkbox"/> End Date	<input type="checkbox"/> Territory Name	<input type="checkbox"/> Assignment Ty...
<input checked="" type="checkbox"/> Debbie Wheeler	3LKOEZTV3OIX4C7MM1	Field Sales	5/1/2022		MSL Indiana	Primary

7. In the **To Users** step, select the user you want to assign to the territory and click **Next**.

User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Integration ID
Alvin Lynch	13AW6TE83QBIY3...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z...	Vaccine SF	GLW3PV8X3OJ7E8...
<input checked="" type="checkbox"/> Andres Cobb	DTQE045V3OIUXD...	Field Sales	Vaccine California	AB3BN4TU3PROAC...	Vaccine SF	GLW3PV8X3OJ7E8...
<input type="checkbox"/> Andy Stevenson	7E7CBDV53OIW352...	Field Sales	Vaccine California	AB3BN4TU3PROAC...	Vaccine SF	GLW3PV8X3OJ7E8...
<input type="checkbox"/> Angelica Bennett	YJJTNV4B3OJ4OZJ...	Field Sales	MSL East North Central	QRFPACHD3Q0LMS...	MSL	Y6ZKSNK23OJ890...
<input type="checkbox"/> Ann Peterson	TXT340GG3OIQ03...	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIO...	Neurology	PSTOAPZU3OJDAP...
<input type="checkbox"/> Archana Bhatt	NK9UHXC53OJ1QN...	Field Sales	Vaccine West Area	JUPBYDMV3PR605...	Vaccine SF	GLW3PV8X3OJ7E8...
<input type="checkbox"/> Ashley Nelson	UK2C9AKK3OILXAF...	Field Sales	Vaccine West Area	JUPBYDMV3PR605...	Vaccine SF	GLW3PV8X3OJ7E8...

8. In the **Selection** step, select the user you've chosen and click **Save**.

User Assignments	To Users
<input checked="" type="checkbox"/> Andres Cobb	
Debbie Wheeler (MSL Indiana)	<input type="checkbox"/>

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.

From Territories/Users User Assignments To Users Selection

Select the territories/users you want to move from:

Territories	Users					
<input type="checkbox"/> Search...	<input checked="" type="checkbox"/> Starts With					
User Name ↑	User Integration Id ↑	User Type	Territory Name	Territory Integration Id	Sales Force Name	Sales Force Integration Id
Alvin Lynch	13AW6TE83QBIY3...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z...	Vaccine SF	GLW3PV8X3OJ7E8...
Andy Stevenson	7E7CBDV53OIW352...	Field Sales	Vaccine California	AB3BN4TU3PROAC...	Vaccine SF	GLW3PV8X3OJ7E8...
<input checked="" type="checkbox"/> Angelica Bennett	YJJTNV4B3OJ4OZJ...	Field Sales	MSL East North Central	QRFPACHD3Q0LMS...	MSL	Y6ZKSNK23OJ890...
Ann Peterson	TXT340GG3OIQ03...	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIO...	Neurology	PSTOAPZU3OJDAP...
Archana Bhatt	NK9UHXC53OJ1QN...	Field Sales	Vaccine West Area	JUPBYDMV3PR605...	Vaccine SF	GLW3PV8X3OJ7E8...

- The User Assignments step shows the current user assignment(s) for the territory. Select the user and click **Next**.

User Assignments To Territories Selection

Select the appropriate current user assignments:

User Name	User Integration Id	User Type	Effective Date	End Date	Territory Name	Assignment Type
<input checked="" type="checkbox"/> Angelica Bennett	YJJTNV4B3OJ4OZJLWP	Field Sales	5/1/2022		MSL East North Central	Primary

- 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.

To Territories Selection

Select the territories you want to move users to:

Existing	New						
<input type="checkbox"/> Search...	<input checked="" type="checkbox"/> Starts With						
Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name	Region Name	Effective Date	End Date
MSL Alabama	6CZV1TZK3Q0LMS7...	District	MSL		US	5/1/2022	
MSL Alaska	J7FF4BES3Q0LMS7...	District	MSL		US	5/1/2022	
MSL Arizona	OXVV8DEZ3Q0LMS...	District	MSL	Bert Huff	US	5/1/2022	
<input checked="" type="checkbox"/> MSL Arkansas	06P1ZCF93Q0LMS7...	District	MSL		US	5/1/2022	
MSL Business Unit	0YJQE70I3Q0LMS7V...	Business Unit	MSL		US	5/1/2022	

- In the Selection step, select the user you've chosen and click **Save**.

By checking the appropriate box, choose which user is moved to which territory:

User Assignments	To Territories
Angelica Bennett (MSL East North Central)	<input checked="" type="checkbox"/> MSL Arkansas

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:

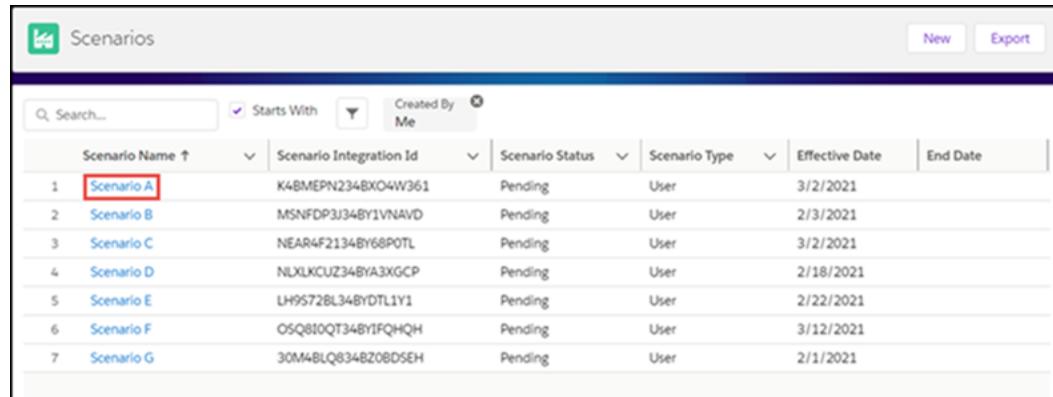
- [Import Scenario Data Using CSV Files](#)
- [Bulk Import Data into a Scenario](#)

Import Scenario Data Using CSV Files

To import data into a scenario using a CSV file

1. Do one of the following:

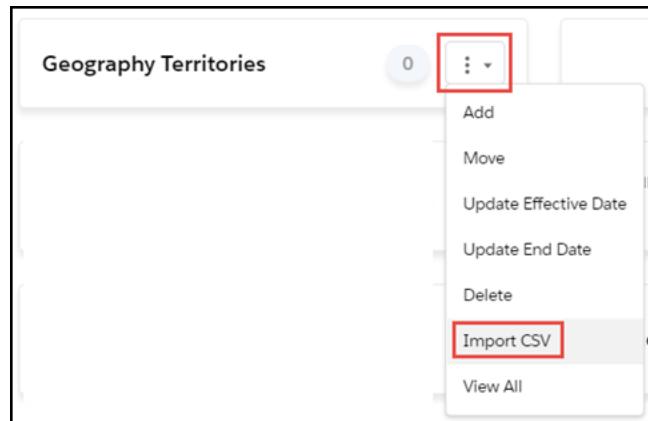
- Create a new scenario. See [Create a New Scenario](#).
- Open an existing scenario from the Scenarios screen.



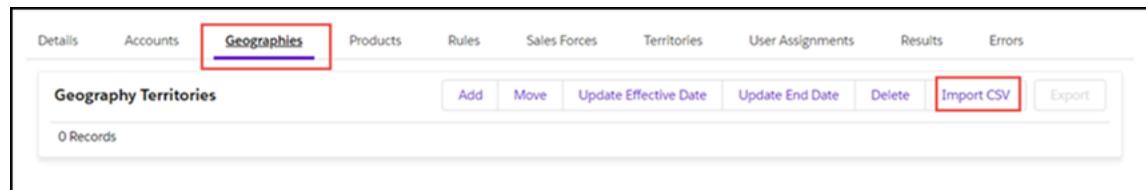
Scenario Name ↑	Scenario Integration Id	Scenario Status	Scenario Type	Effective Date	End Date
1 Scenario A	K4BMEPN234BX04W361	Pending	User	3/2/2021	
2 Scenario B	MSNFPD3J34BY1VNAVD	Pending	User	2/3/2021	
3 Scenario C	NEAR4F2134BY68POTL	Pending	User	3/2/2021	
4 Scenario D	NUXKCUZ34BYA3XGCP	Pending	User	2/18/2021	
5 Scenario E	LH9572BL34BYDTL1Y1	Pending	User	2/22/2021	
6 Scenario F	OSQ8I0QT34BY1FQHQH	Pending	User	3/12/2021	
7 Scenario G	30M4BLQ834BZ0BDSEH	Pending	User	2/1/2021	

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.



Details	Accounts	Geographies	Products	Rules	Sales Forces	Territories	User Assignments	Results	Errors
Geography Territories									
Add Move Update Effective Date Update End Date Delete Import CSV Export									

Note: For Account Territory Explicit CSV imports, you can choose to include Account Owner Indicator records.

- Select the type of import action, such as *Add*, *Move*, *Update Effective Date*, *Update End Date*, or *Delete*.

The screenshot shows the 'Import CSV' interface. At the top, there are three tabs: 'Select File' (highlighted in blue), 'Map Fields', and 'Import'. Below the tabs, a message says 'Select the action and pick your csv file:'. There are two dropdown menus: one for 'Action' set to 'Move', and another for 'CSV File' with a 'Select File' button and a placeholder 'or drop file'. At the bottom right are 'Cancel' and 'Next' buttons.

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

The screenshot shows the 'Import CSV' interface with the 'Data Preview' section expanded. At the top, it shows scenario details: Status 'Pending', Type 'User', Region Name 'Region A', Effective Date '11/8/2022', and End Date '11/8/2022'. Below this is the 'Select File' step, identical to the previous screenshot. The 'Data Preview' section contains a table with five columns: 'From Territory Integration Id', 'From User Integration Id', 'From Assignment Type', 'To User Integration Id', and 'To Territory Integration Id'. The data rows are:

From Territory Integration Id	From User Integration Id	From Assignment Type	To User Integration Id	To Territory Integration Id
6ZR2X0043Q0LMSA027	095KE7PB30IRIS24UH	PRIM	GC8FO5ZR30IN8SQ5W9	
LI3F9RPF3RUKA10FMZ	4NO883K330IWMDBY4P	PRIM	Z7F3QFGI30IXVIZE9L	
HUIBZIDI3Q0LMS83GE	G3MZSV8I3OJ2VG4OZD	PRIM		06P1ZCF93Q0LMS700S
Z3ADC3AX3Q0LMS8QLW	JZJ3HU8X3OIM8EKBT	PRIM		2E2ZOXWE3Q0LMS961I
91I3HNR83PSIRILA1J	OTHIAF3V3OJ23A7A21	PRIM		KARMQUAV3Q0LMS8YBO

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.

The screenshot shows the 'Import CSV' interface with the following details:

- Header:** a1 Import CSV
- Scenario Status:** Pending
- Scenario Type:** User
- Region Name:** (empty)
- Effective Date:** 11/8/2022
- End Date:** (empty)
- Processing Start Time:** (empty)
- Processing End Time:** (empty)

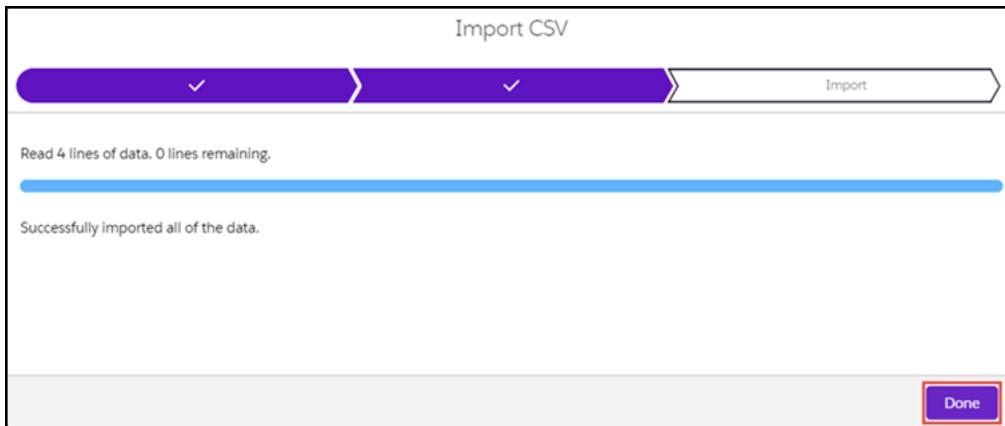
Buttons: A green checkmark icon, a blue 'Map Fields' button, and a grey 'Import' button.

Text: Each column found in the CSV file is displayed below. Please map each one to an object column by selecting from the dropdown.

Mapping Table:

For CSV Field:	Map to Object Field:
From Territory Integration Id	From Territory Integration Id (required)
From User Integration Id	From User Integration Id (required)
From Assignment Type	From Assignment Type (required)
To User Integration Id	To User Integration Id (one required)
To Territory Integration Id	To Territory Integration Id (one required)

7. After the data successfully imports, click **Done**.



The data is added to the scenario.

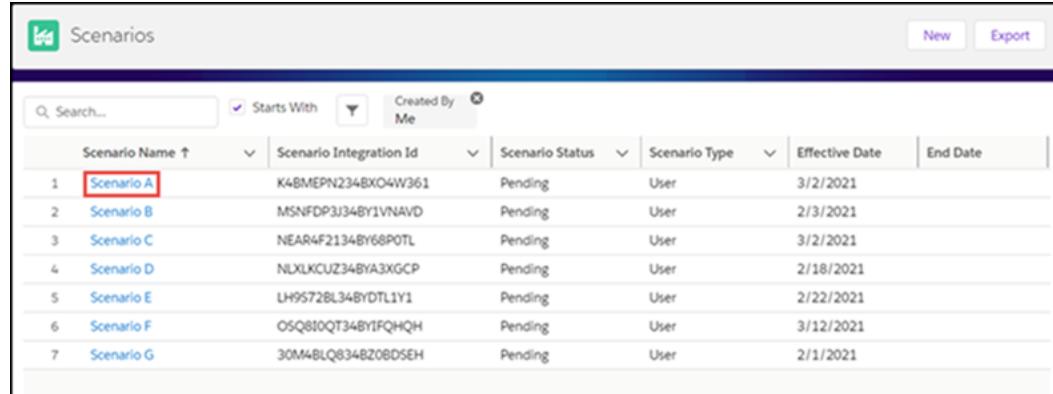
Scenario a1																																		
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Created Date	Modified Date	Processing End Time	Sync End Time	Actions																									
Pending	User		11/8/2022						New Edit Simulate Commit Copy Delete																									
Details Accounts Geographies Products Rules Engagement Plan						User Assignments Results Errors																												
User Assignments <table border="1"> <thead> <tr> <th>Action</th> <th>Territory Name</th> <th>Territory Integration ID</th> <th>Termination Date</th> </tr> </thead> <tbody> <tr><td>1</td><td>Update End Date to Prioritize</td><td>MSL Maine</td><td>6ZR2X0043Q0LMSAO...</td></tr> <tr><td>2</td><td>Update End Date to Prioritize</td><td>Neurology Iowa</td><td>LI3F9RPF3RUKAI0FMZ...</td></tr> <tr><td>3</td><td>Update End Date to Prioritize</td><td>MSL California</td><td>HUIBZID13Q0LMS83GE...</td></tr> <tr><td>4</td><td>Update End Date to Prioritize</td><td>MSL New Jersey</td><td>Z3ADC3AX3Q0LMS8Q...</td></tr> <tr><td>5</td><td>Update End Date to Prioritize</td><td>Vaccine Delaware County</td><td>91I3HNR83PSIRILA1J...</td></tr> </tbody> </table>						Action	Territory Name	Territory Integration ID	Termination Date	1	Update End Date to Prioritize	MSL Maine	6ZR2X0043Q0LMSAO...	2	Update End Date to Prioritize	Neurology Iowa	LI3F9RPF3RUKAI0FMZ...	3	Update End Date to Prioritize	MSL California	HUIBZID13Q0LMS83GE...	4	Update End Date to Prioritize	MSL New Jersey	Z3ADC3AX3Q0LMS8Q...	5	Update End Date to Prioritize	Vaccine Delaware County	91I3HNR83PSIRILA1J...	Add Move Edit Update Effective Date Update End Date Delete				
Action	Territory Name	Territory Integration ID	Termination Date																															
1	Update End Date to Prioritize	MSL Maine	6ZR2X0043Q0LMSAO...																															
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4	Update End Date to Prioritize	MSL New Jersey	Z3ADC3AX3Q0LMS8Q...																															
5	Update End Date to Prioritize	Vaccine Delaware County	91I3HNR83PSIRILA1J...																															
10 of 10																																		

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.



The screenshot shows a table titled "Scenarios" with the following data:

Scenario Name ↑	Scenario Integration Id	Scenario Status	Scenario Type	Effective Date	End Date
1 Scenario A	K4BMEPN234BXO4W361	Pending	User	3/2/2021	
2 Scenario B	MSNFDP3J34BY1VNAVD	Pending	User	2/3/2021	
3 Scenario C	NEAR4F2134BY68POTL	Pending	User	3/2/2021	
4 Scenario D	NUXKCUZ34BYA3XGCP	Pending	User	2/18/2021	
5 Scenario E	LH9572BL34BYDTL1Y1	Pending	User	2/22/2021	
6 Scenario F	OSQ8I0QT34BY1FQHQH	Pending	User	3/12/2021	
7 Scenario G	30M4BLQ834BZ0BDSEH	Pending	User	2/1/2021	

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.

Bulk Import Template - 2022-07-12T143557.406	
File Edit View Insert Format Data Tools Help	
A	B
1	Sales Forces
2	Action/Ac Name/Sel Type/Sale Descriptix EffectiveC EndDate/Region/Externalix Externalix Externalix Externalix Externalix Unique/Alignmen ManageGeographyAsUnique/Manage Geography As Unique
3	
4	
5	
6	
7	

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**.

Entity	Field	Code	Description
Account	Ei Purpose	ALGN	Alignment
Account	Ei Purpose	COMP	Compensati
Account	Ei Purpose	ALGN	Alignment
Account	Ei Purpose	COMP	Compensati
Account	Si Purpose	ALGN	Alignment
Account	Si Purpose	COMP	Compensati
Geography	Purpose	COMP	Compensati
Geography	Purpose	SFA	SFA
Geography	Source	EXPL	Explicit
Product	Sa Product	AI DETL	Detail
Product	Sa Product	AI MIRF	Mirf
Product	Sa Product	AI PROM	Promotional
Product	Sa Product	AI RATE	Ratings
Product	Sa Product	AI SMOD	Sample Ord
Product	Sa Product	AI SMPL	Sample
Product	Sa Product	AI SPOA	Sales
Product	T4 Product	AI DETL	Detail
Product	T4 Product	AI MIRF	Mirf
Product	T4 Product	AI PROM	Promotional
Product	T4 Product	AI RATE	Ratings
Product	T4 Product	AI SMOD	Sample Ord
Product	T4 Product	AI SMPL	Sample
Product	T4 Product	AI SPOA	Sales
Product	T4 Product	AI DETL	Detail
Product	T4 Product	AI MIRF	Mirf
Product	T4 Product	AI PROM	Promotional
Product	T4 Product	AI RATE	Ratings
Product	T4 Product	AI SMOD	Sample Ord

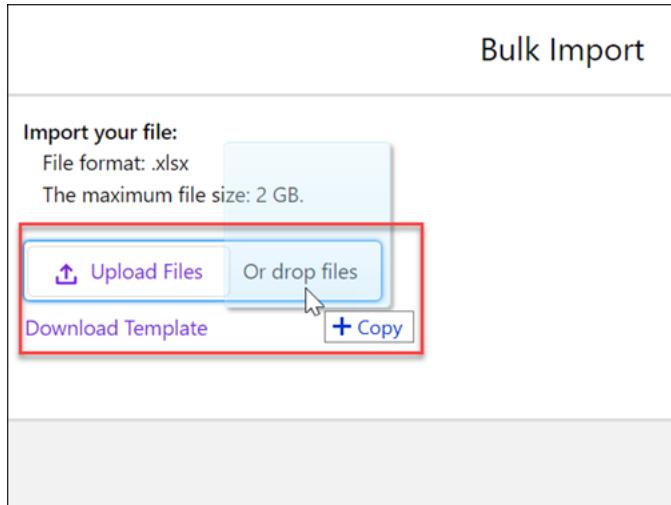
Bulk Import

Import your file:
File format: .xlsx
The maximum file size: 2 GB.

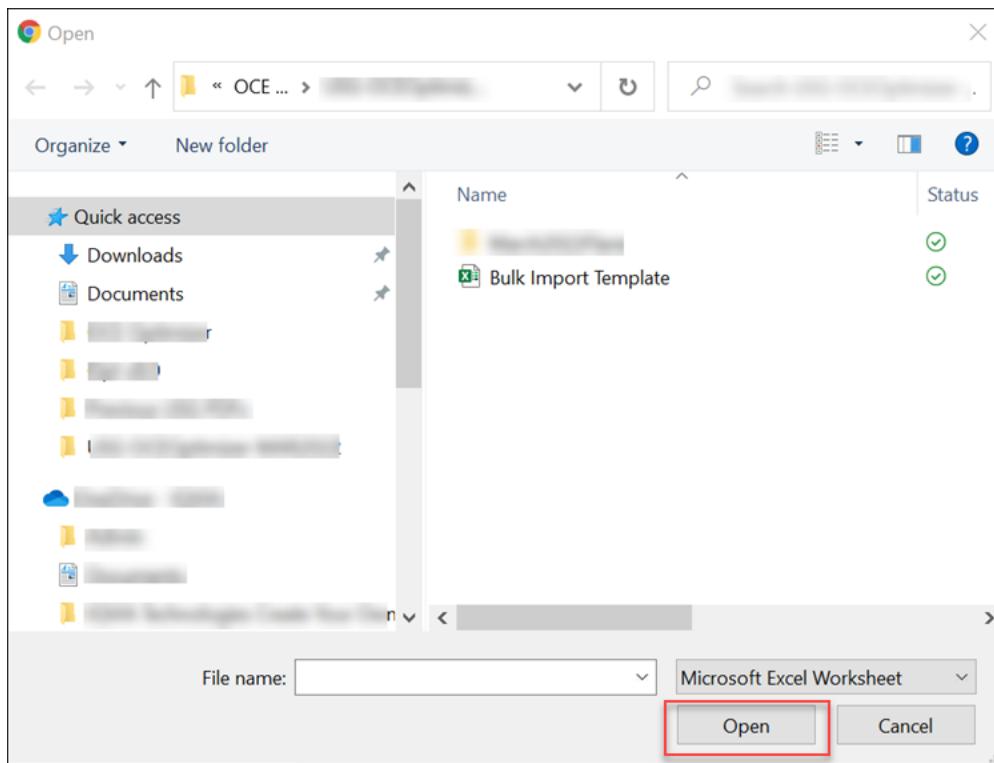
Or drop files

3. Do one of the following:

- Drag and drop the Excel file.

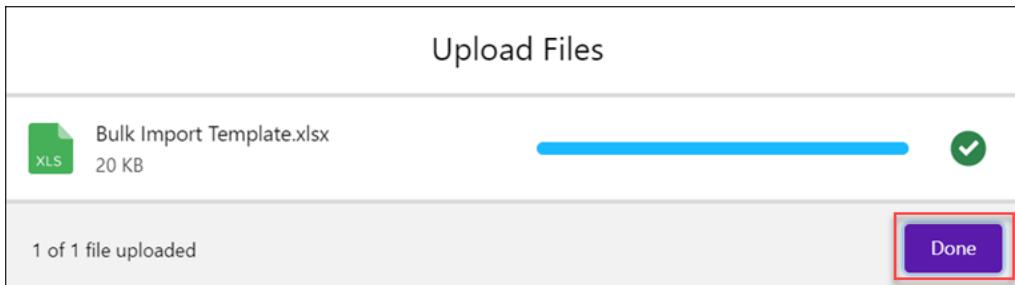


- Click **Upload Files**, select the Excel file to import, and click **Open**.

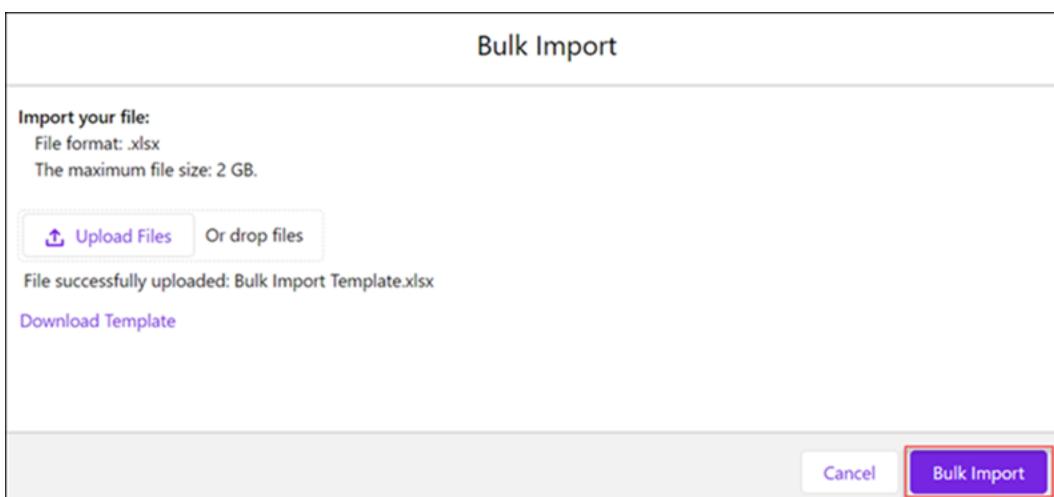


Note: The imported file must have an **.xlsx** extension and cannot be larger than 2 GB.

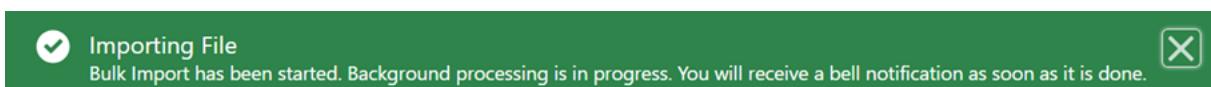
4. Click **Done** after the file uploads.



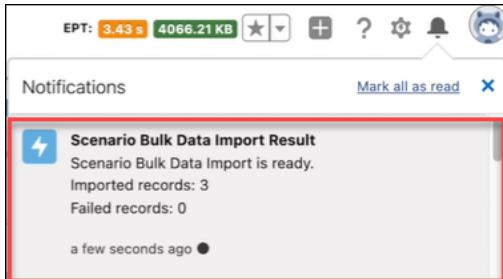
5. Click **Bulk Import**.



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.

Scenario Bulk Import									New	Edit	Simulate	Commit	Copy	Delete	Map	Bulk Import															
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time																								
Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors																					
Errors																															
<table border="1"> <thead> <tr> <th>Error Code</th> <th>Table Name</th> <th>Integration Id</th> <th>Error Message</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Bulk Import Error</td> <td></td> <td>OMScenarioSalesForce2: was not found or user doesn't have access to it.</td> </tr> <tr> <td>2</td> <td>Scenario Territory</td> <td>2</td> <td>ADD2 Action is not applicable for Object OMScenarioTerritory</td> </tr> <tr> <td>3</td> <td>Scenario Territory</td> <td>3</td> <td>Field Type is required for Object OMScenarioTerritory with ADD Action</td> </tr> </tbody> </table>																Error Code	Table Name	Integration Id	Error Message	1	Bulk Import Error		OMScenarioSalesForce2: was not found or user doesn't have access to it.	2	Scenario Territory	2	ADD2 Action is not applicable for Object OMScenarioTerritory	3	Scenario Territory	3	Field Type is required for Object OMScenarioTerritory with ADD Action
Error Code	Table Name	Integration Id	Error Message																												
1	Bulk Import Error		OMScenarioSalesForce2: was not found or user doesn't have access to it.																												
2	Scenario Territory	2	ADD2 Action is not applicable for Object OMScenarioTerritory																												
3	Scenario Territory	3	Field Type is required for Object OMScenarioTerritory with ADD Action																												
3 of 3																															
View All																															

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](#)

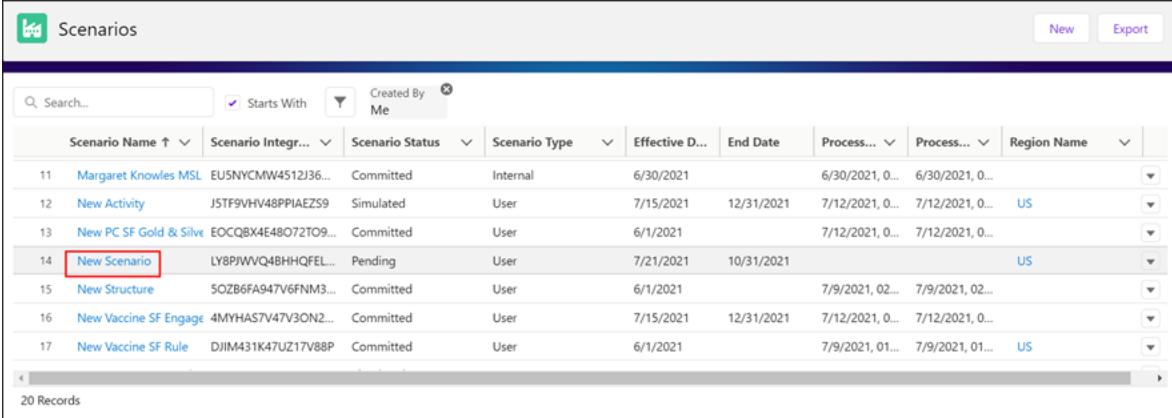
Modify Transactions or Rules in a Scenario

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)

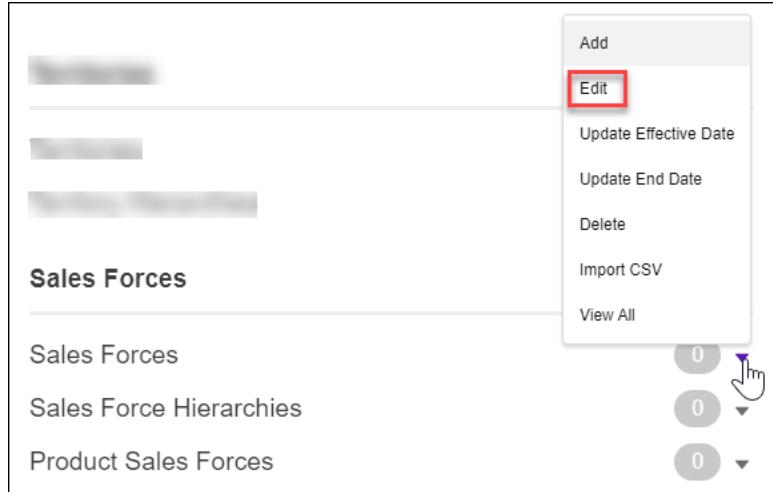
To edit a sales force transaction in a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to modify.



Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
11 Margaret Knowles MSL	EU5NYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...	6/30/2021, 0...	US
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13 New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	US
14 New Scenario	L18PJVWQ48FHHQFEL...	Pending	User	7/21/2021	10/31/2021		7/9/2021, 02...	US
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	US
16 New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

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**.

Action	Sales Force Name	Sales Force Integration Id	Sales Force Type	Sales Force Description
1 Add	Sales Force A	YYN42KX92FV35OMLRD	Institutional	

- 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.

Sales Force Edit

Sales Force Details

Select the Sales Force you want to modify:

Existing New

Sales Force Name ↑	Sales Force Integration Id	Sales Force Type	Region Name	Effective D.
Diabetes and Oncology	10000000088200	Retail	US	1/1/2020
Diabetes Sales	10000000087424	Retail	US	1/1/2020
Oncology Sales	10000000087264	Institutional	US	1/1/2020

3 Records

Cancel Next

5. Modify the applicable fields, then click **Save**.

Sales Force Edit

Information

* Sales Force Name	Sales Force Integration Id
Diabetes Sales	10000000087424
* Sales Force Type	* Region
Retail	US
Sales Force Description	Alignment Limited To Region
Diabetes Sales	<input type="checkbox"/>

External IDs

External ID1	External ID2
10000000087424	
External ID3	External ID4

Previous Save

The **Action** status of the modified Sales Forces transaction is *Edit*.

Sales Forces					Add	Edit	Update Effective Date	Update End Date	Delete
Action	Sales Force Name ↑	Sales Force Integration Id	Sales Force Type	Sales Force Description					
1 Edit	Diabetes Sales	10000000087424	Retail	Diabetes Sales					
2 Add	Sales Force A	YYN42KX92FV3S0MLRD	Institutional						
2 Records					View All				

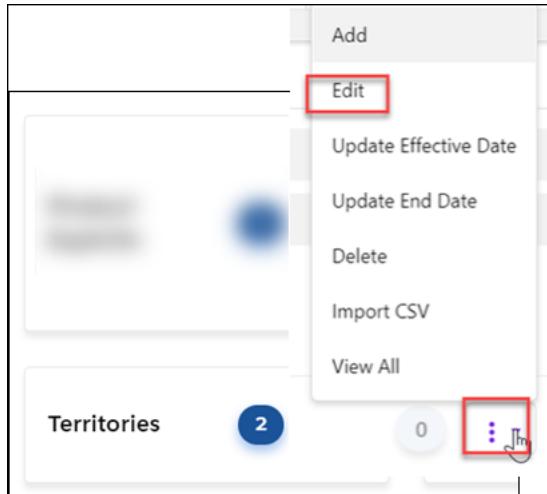
To modify a territory transaction in a scenario

1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to modify.

Scenarios											New	Export
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With <input type="checkbox"/> Created By Me											New	Export
Scenario Name ↑	Scenario Integrat...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name				
11 Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...					
12 New Activity	J5TF9VHV48PPIAEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US				
13 New PC SF Gold & Silver	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...					
14 New Scenario	LY8PJWVQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US				
15 New Structure	5OZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...					
16 New Vaccine SF Engage	4MYHASTV47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...					
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US				
20 Records												

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.

Action	Territory Name	Territory Integration Id	Territory Type	Sales Force Name	Sales Force Integration Id
1 Add	4884 District	AQ691I092C41XL6NDL	District	Diabetes Sales	10000000087424

- 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.

Territory Edit

Territory
Details

Select the Territory you want to modify:

Existing **New**

Territory Name ↑ ↓	Territory Integr...	Territory Type	Sales Force Na...	User Name	Regi...
Connecticut - Diabetes	100690000010596	Territory	Diabetes Sales	Kirby Seif	US
Connecticut - Oncology	100690000013175	Territory	Oncology Sales	Babs Steutly	US
Delaware - Diabetes Sal	100690000013295	Territory	Diabetes Sales	Alisun Olohan	US

10+ Records

Cancel
Next

5. Modify the applicable fields, and then click **Save**.

Territory Edit

✓
Details

Information

* Territory Name <input type="text" value="Connecticut - Diabetes Sales"/>	Territory Integration Id 100690000010596
* Territory Type <input type="text" value="Territory"/>	Short Name <input type="text"/>
* Region <input type="text" value="US"/>	* Sales Force <input type="text" value="Diabetes Sales"/>

Address

Address Line 1 <input type="text"/>	Address Line 2 <input type="text"/>
Address Line 3 <input type="text"/>	City <input type="text"/>

Previous
Save

The **Action** status of the modified Territories transaction is *Edit*.

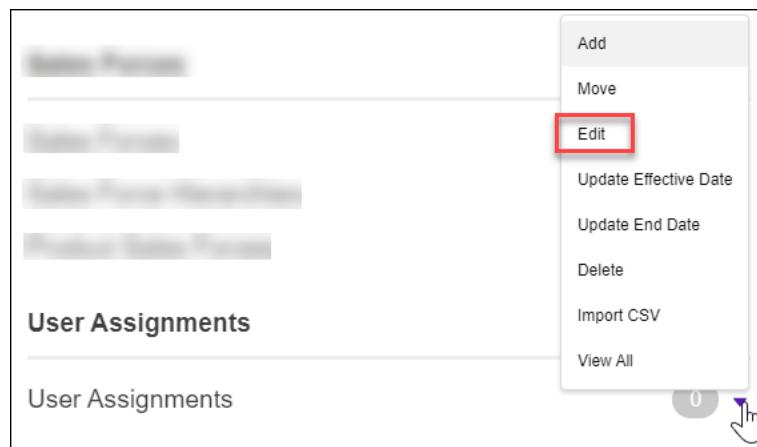
Territories						Add	Edit	Update Effective Date	Update End Date	Delete
Action	Territory Name	Territory Integration Id	Territory Type	Sales Force Name	Sales Force Integration Id					
1 Add	4884 District	AQ691I092C41XL6NDL	District	Diabetes Sales	10000000087424					
2 Edit	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	10000000087424					
2 Records										
View All										

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.

Scenarios											New	Export
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With Me												
Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name				
11 Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...						
12 New Activity	JSTF9VHV48PIAEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US				
13 New PC SF Gold & Silve	EOCQBX4E48O72T09...	Committed	User	6/1/2021	7/12/2021, 0...	7/12/2021, 0...	7/12/2021, 0...					
14 New Scenario	LY8PJWVQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US				
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021	7/9/2021, 02...	7/9/2021, 02...						
16 New Vaccine SF Engage	4MYHASTV47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...					
17 New Vaccine SF Rule	DIJM431K47UZ17V88P	Committed	User	6/1/2021	7/9/2021, 01...	7/9/2021, 01...	7/9/2021, 01...	US				
20 Records												

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.



- Select the check box next to the user you want to modify, then click **Next**.

The screenshot shows the 'User Assignment Type Edit' screen. At the top, there's a header 'User Assignment Type Edit' and a breadcrumb trail 'Users/Territories > Selections'. Below the header, a message says 'Select the users/territories for which you want to update the user assignment type:'. There are two tabs: 'Users' (selected) and 'Territories'. A search bar with 'Search...' and 'Starts With' checkboxes is present. The main area is a grid table with columns: User Name, User Integration Id, User Type, Territory Name, Territory Integration Id, Sales Force Name, Sales Force Integration Id, and Region Name. The grid lists various users like Alvin Lynch, Andy Stevenson, etc., each with their respective details. A row for Celia Kim is selected, indicated by a purple border. At the bottom right of the grid, there are 'Cancel' and 'Next' buttons, with 'Next' highlighted with a red box.

- 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 screenshot shows the 'User Assignment Type Edit' screen with a dropdown menu 'Assignment Type' set to 'Primary'. The main grid table now only shows rows for users assigned to 'Primary'. The 'Save' button at the bottom right is highlighted with a red box.

The Action status of the modified User Assignment transaction is *Edit*.

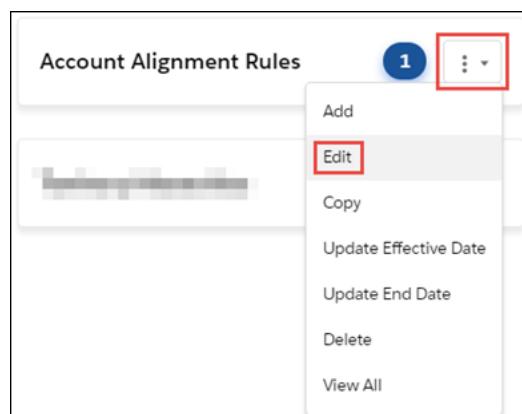
Action	Territory Name	Territory Integration Id	Territory Type	Sales Force Name	User Name	User Integration Id	User Type	Assignment Type
1 Edit	Neurology Area 1	USCSCRM3PLKAUHMS	Area	Neurology	Ann Peterson	TXT3400000Q201910	Field Sales	Primary

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.

Scenario Name	Scenario Integrat...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
11 Margaret Knowles MSL	EUSNYCMW451236...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...		
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13 New PC SF Gold & Silve	EOCQB8X4E48072T09...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	
14 New Scenario	LY8PJWVQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	
16 New Vaccine SF Engage	4MYHAS7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	
17 New Vaccine SF Rule	DJIM431K47U17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

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.

The screenshot shows the 'Account Alignment Rules' section of the scenario editor. At the top, there are buttons for 'New', 'Edit', 'Simulate', 'Commit', 'Copy', 'Delete', and 'Map'. Below these are tabs for 'Details', 'Accounts', 'Geographies', 'Products', 'Rules', 'Engagement Plans', 'Sales Forces', 'Territories', 'User Assignments', 'Results', and 'Errors'. The 'Rules' tab is selected. Under 'Account Alignment Rules', there is a table with columns: Action, Account Rule Name, Account Rule Integration Id, Description, Sales Force Name, and Sales Force Integration Id. One record is listed: 'Add SF Rule' with integration id 'MOJ124V2F6YKOU3CP', description 'Diabetes Sales', sales force name 'Diabetes Sales', and integration id '10000000087424'. A 'View All' link is at the bottom.

- 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.

The screenshot shows the 'Account Rule Edit' screen. At the top, there is a navigation bar with tabs: 'Rule' (highlighted), 'Details', 'Level 1', and 'Summary'. Below this is a section titled 'Select the Rule you want to modify:' with tabs for 'Existing' (highlighted) and 'New'. There is a search bar and a filter icon. A table lists two records: 'Alignment Rule A' and 'ANS Rule'. Both records have 'Diabetes Sales' as the sales force name, '10000000087424' as the integration id, and 'US' as the region name. A 'View All' link is at the bottom.

- Modify the applicable fields, and then click **Next**.

Account Rule Edit

Details Level 1 Level 2 Level 3 Summary

Enter the information for the rule

Information

* Account Rule Name: Alignment Rule A
Account Rule Integration Id: PUKX4JZR2EKJPAOA61

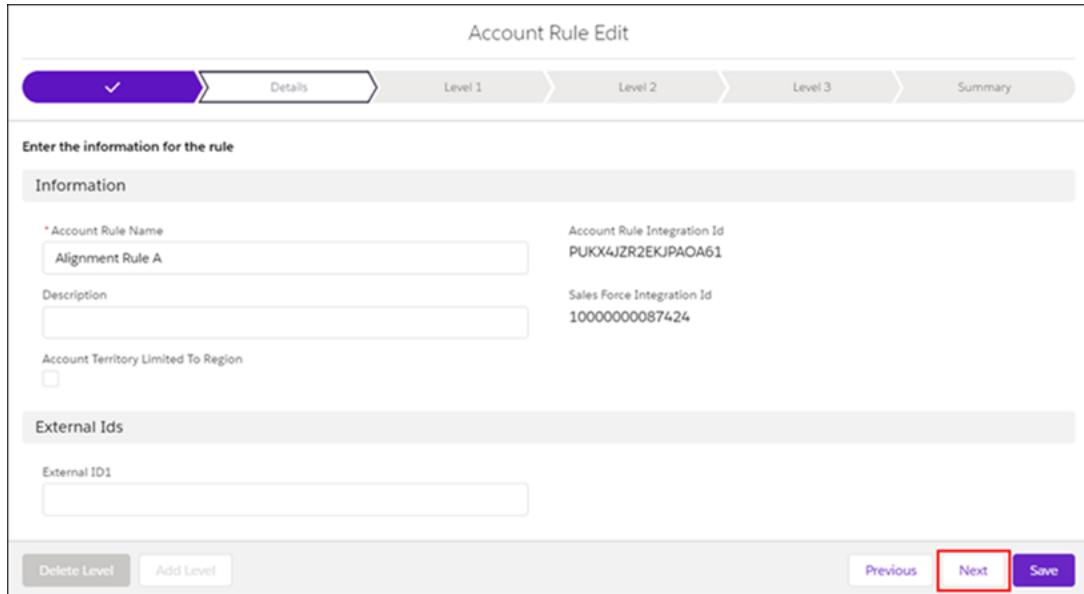
Description:
Sales Force Integration Id: 10000000087424

Account Territory Limited To Region:

External Ids

External ID1:

Delete Level Add Level Previous Next Save



6. Modify the details of the rule, including the groups and conditions, if applicable, then click **Next**.

Account Rule Edit

Level 1 Level 2 Level 3 Summary

Accounts

Scope: In Geography

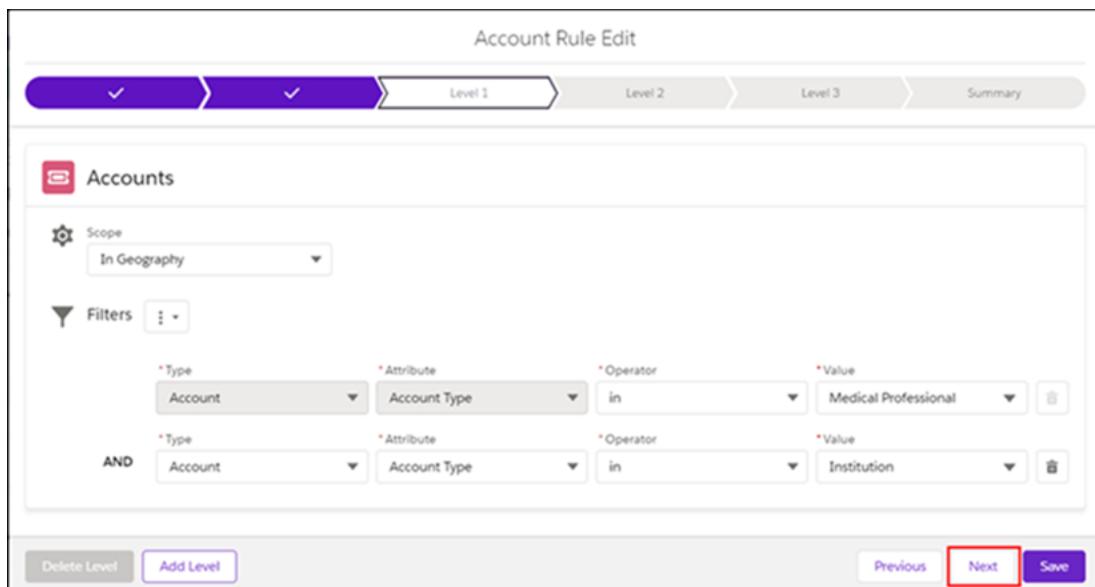
Filters:

Type: Account Attribute: Account Type Operator: in Value: Medical Professional

AND

Type: Account Attribute: Account Type Operator: in Value: Institution

Delete Level Add Level Previous Next Save



7. If you added levels to the rule, make modifications and then click **Next**.

Account Rule Edit

Level 2 Level 3 Summary

Affiliations

Direction: Down Restricted Recursive

Filters

*Type	*Attribute	*Operator	*Value
Affiliation	Specialty	In	Diabetes

Child Accounts

Filters

*Type	*Attribute	*Operator	*Value
Account	Account Type	In	Institution

Buttons: Delete Level Add Level Previous **Next** (highlighted with red box) Save

Account Rule Edit

Level 3 Summary

Affiliations

Direction: Up Restricted Recursive

Filters

There are no filters currently defined here. Use the menu button above to add one.

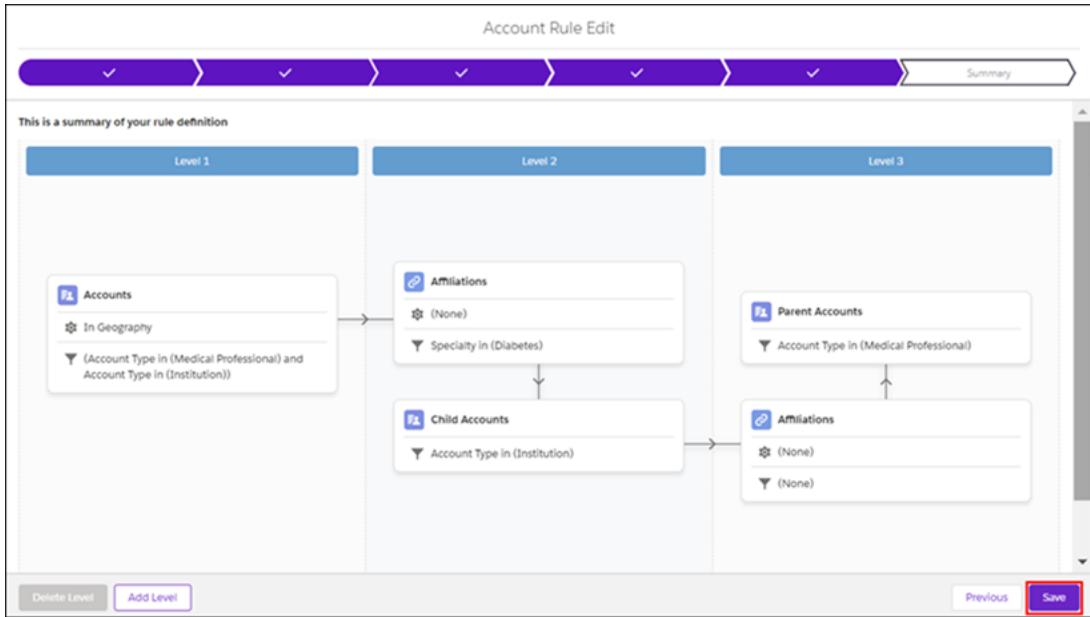
Parent Accounts

Filters

*Type	*Attribute	*Operator	*Value
Account	Account Type	In	Medical Professional

Buttons: Delete Level Add Level Previous **Next** (highlighted with red box) Save

- 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*.

Action	Account Rule Name	Account Rule Integration Id	Description	Sales Force Name	Sales Force Integra...
1 Edit	Alignment Rule A	PUKX4JZR2EKJPAOA61		Diabetes Sales	10000000087424
2 Add	SF Rule	MOJ12J4V2F6YKOU3CP		Diabetes Sales	10000000087424

2 Records

View All

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

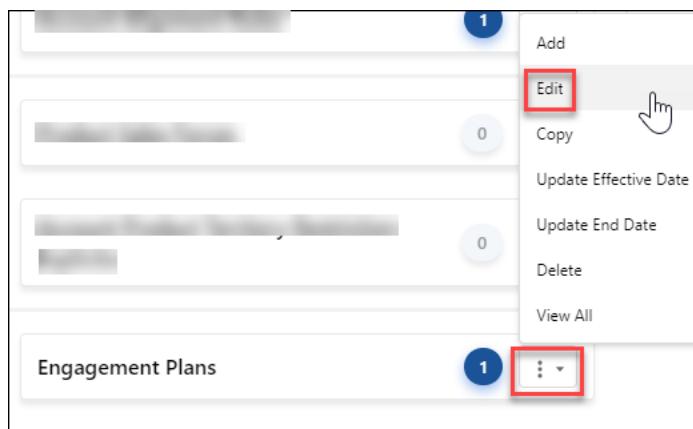
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the transaction you want to modify.

Scenarios											New	Export
<input type="text" value="Search..."/>		<input checked="" type="checkbox"/> Starts With	<input type="button" value="▼"/>	Created By Me								
Scenario Name ↑	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name	Region Name	Region Name	Region Name	Region Name
11 Margaret Knowles MSL	EU5NYCMW4512J36...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...					
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US	US	US	US	US
13 New PC SF Gold & Silve	EOCQB8X4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...					
14 New Scenario	LY8PJWWQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US	US	US	US	US
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...					
16 New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...					
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US	US	US	US	US

20 Records

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**.

Scenario XYZ Engagement Plan									New	Edit	Simulate	Commit	Copy	Delete	Map	Adjudication		
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time											
Simulated	User	US	9/13/2021	9/30/2021	9/10/2021, 1:14:42 PM	9/10/2021, 1:17:22 PM		Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
								Add	Edit	Copy	Update Effective Date	Update End Date	Delete					

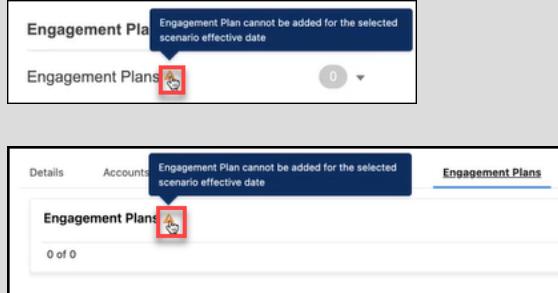
Engagement Plans

Action	Engagement Plan Name ↑	Engagement Plan Integration Id	Engagement Plan Description	Sales Force Name
1 Add	All Eng Plan	C14QF2QG4554PHVW7	Oncology Sales	

1 Records

[View All](#)

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.

Action	Engagement Plan Name	Engagement Plan Integration Id	Engagement Plan Description	Sales Force Name	Effective Date	End Date
Add	AB Eng Plan	C14QPZQQ4R554PWV7		Oncology Sales		

5. Use the **Next** and **Previous** buttons to navigate the screens, modify the applicable fields, then

click **Save**.

The screenshot shows the 'Edit Engagement Plan' interface. At the top, there's a navigation bar with tabs: Details (which is selected), Channels, Segment 1, Segment 2, Segment 3, and Summary. Below the tabs, there are several sections: 'Enter engagement plan details' (Information), 'External IDs', and 'Audit Information'. In the 'Information' section, fields include 'Engagement Plan Name' (AB Eng Plan), 'Engagement Plan Description' (Sales Force Oncology Sales), 'Working Days' (14), 'Target Call Rate' (10), 'Minimum Call Rate' (Maximum Call Rate), and 'External ID1'. The 'Audit Information' section shows 'Created By' (Aditi Kapoor, 9/10/2021, 12:56 PM) and 'Last Modified By' (Aditi Kapoor, 9/10/2021, 12:56 PM). At the bottom, there are buttons for 'Delete Segment', 'Add Segment', 'Previous', 'Next', and a prominent purple 'Save' button.

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.

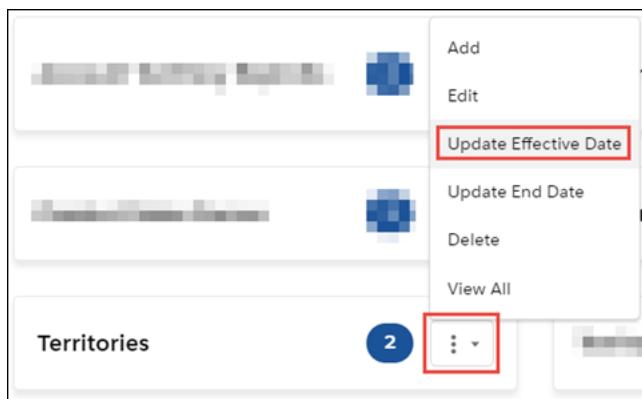
The screenshot shows the 'Scenarios' list page. At the top, there's a search bar, a filter for 'Starts With Me', and buttons for 'New' and 'Export'. Below is a table with columns: Scenario Name, Scenario Integr..., Scenario Status, Scenario Type, Effective D..., End Date, Process..., Process..., and Region Name. The table lists 20 records. One row, '14 New Scenario', has its entire row highlighted with a red border. The data in the table is as follows:

	Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
11	Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...	6/30/2021, 0...	
12	New Activity	JSTF9VHV48PPIAEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13	New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	
14	New Scenario	LY8PJWVQ4BHJHFEL...	Pending	User	7/21/2021	10/31/2021			US
15	New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	
16	New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	
17	New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

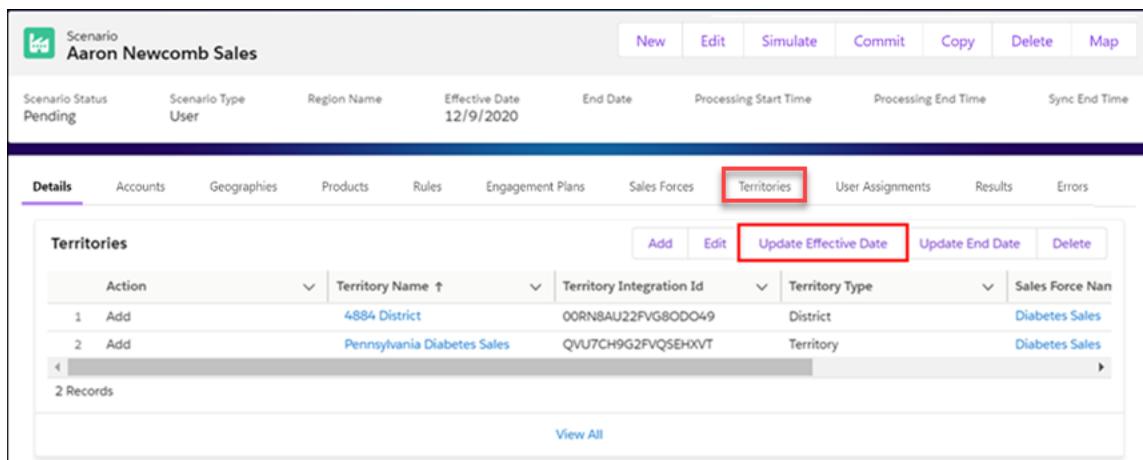
3. Do one of the following:

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.



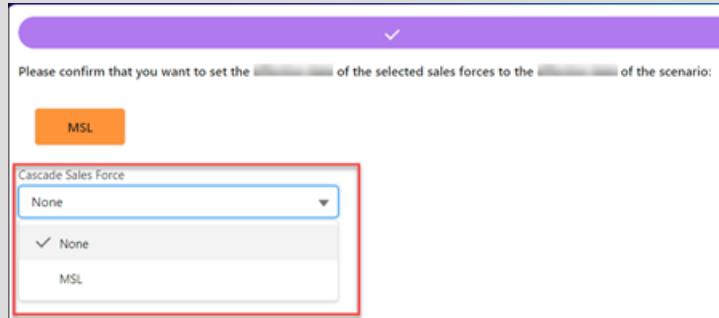
4. Select the territory or territories (or sales force(s), user(s), rules, etc.) whose effective date(s) you want to update, then click **Next**.

Territory Update Effective Date				
Territory		Confirmation		
<input type="text" value="Q Search..."/> <input checked="" type="checkbox"/> Starts With <input type="button" value="▼"/>				
Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name
<input checked="" type="checkbox"/> Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Seif
<input type="checkbox"/> Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales	Babs Steutly
<input type="checkbox"/> Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Alisun Oloha
<input type="checkbox"/> Delaware - Oncology Sales	100690000013130	Territory	Oncology Sales	Edward Earp
<input type="checkbox"/> Maine - Diabetes Sales	100690000013205	Territory	Diabetes Sales	Tarah Keneli
◀ ▶				
10+ Records				
				<input type="button" value="Cancel"/> <input style="border: 2px solid red;" type="button" value="Next"/>

- 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.



Territory Update Effective Date

✓
Confirmation

Please confirm that you want to set the effective date of the selected territories to the effective date of the scenario:

Connecticut - Diabetes Sales

Cascade

Previous
Save

The **Action** status of the updated transaction is *Update Effective Date*.

Territories						
	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	Add	Pennsylvania Diabetes Sales	QVU7CH9G2FVQSEHXVT	Territory	Diabetes Sales	10000000087424

3 Records

[View All](#)

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.

Scenarios

New
Export

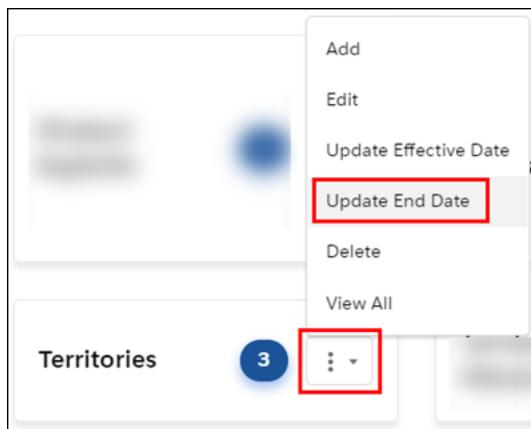
	Scenario Name ↑	Scenario Integrat...	Scenario Status	Scenario Type	Effective D...	End Date	Process... ↓	Process... ↓	Region Name
11	Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...		
12	New Activity	JSTF9VHV48PIAEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13	New PC SF Gold & Silv	EOCQBX4E48O72T09...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	
14	New Scenario	LY8PIWVQ4BHIIQFEL...	Pending	User	7/21/2021	10/31/2021			US
15	New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	
16	New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	
17	New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

20 Records

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.

Scenario Aaron Newcomb Sales								New	Edit	Simulate	Commit	Copy	Delete	Map		
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time									
Pending	User		12/9/2020													
Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors						
Territories								Add	Edit	Update Effective Date	Update End Date					
1	Add	4884 District	00RN8AU22FVG8ODO49	District	Diabetes Sales	10000000087424										
2	Update Effective Date	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	10000000087424										
3	Add	Pennsylvania Diabetes Sales	QVU7CH9G2FVQSEHXVT	Territory	Diabetes Sales	10000000087424										
3 Records								View All								

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**.

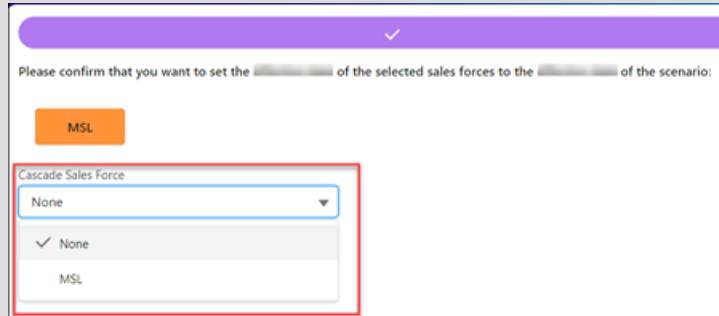
Territory Update End Date

Territory		Confirmation		
<input type="text" value="Search..."/>	<input checked="" type="checkbox"/> Starts With			
<input type="checkbox"/> Territory Name ↑	<input type="checkbox"/> Territory Integration Id	<input type="checkbox"/> Territory Type	<input type="checkbox"/> Sales Force Name	<input type="checkbox"/> User Name
<input checked="" type="checkbox"/> Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Seif
<input type="checkbox"/> Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales	Babs Steutl
<input type="checkbox"/> Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Alisun Olof
<input type="checkbox"/> Delaware - Oncology Sales	100690000013130	Territory	Oncology Sales	Edward Ear
<input type="checkbox"/> Maine - Diabetes Sales	100690000013205	Territory	Diabetes Sales	Tarah Kene
< 10+ Records >				
<input type="button" value="Cancel"/> <input style="border: 2px solid red;" type="button" value="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.



Territory Update End Date

Please confirm that you want to set the end date of the selected territories to the end date of the scenario:

Connecticut - Diabetes Sales

Cascade

[Previous](#) **Save** [Next](#)

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					

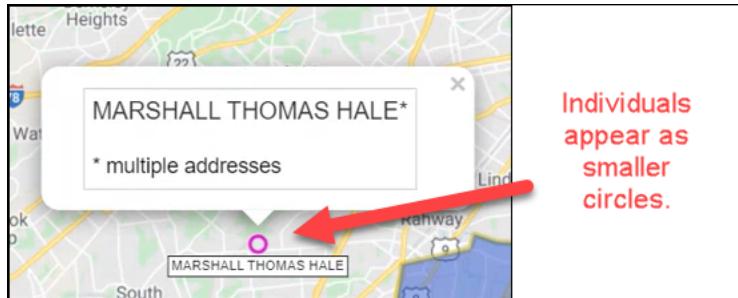
4 Records

[View All](#)

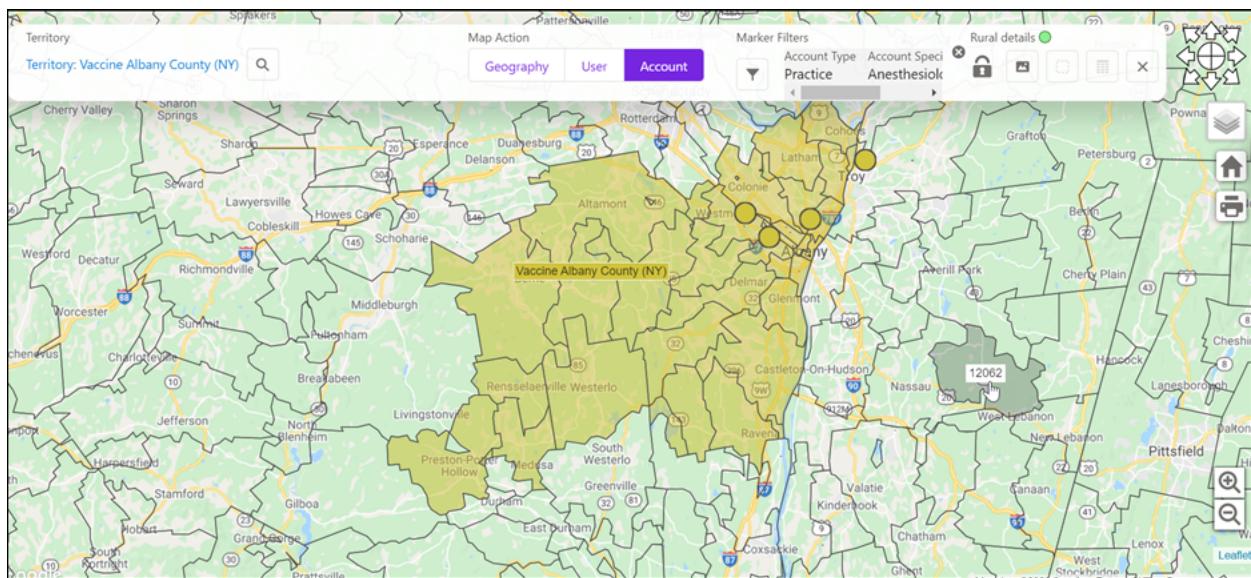
Manage Transactions Using Maps

You can manage geography territory alignments, user assignments, and account territory explicit 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.

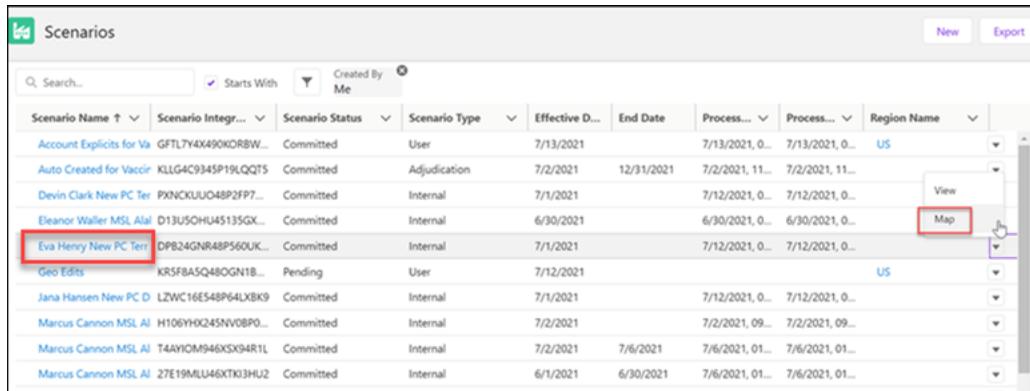
Note: If you have already accessed Maps and are continuing with additional maps transactions within the same scenario, the map appears as it was the last time it was accessed.

To access Maps

1. From the primary navigation bar, click **Scenarios**.

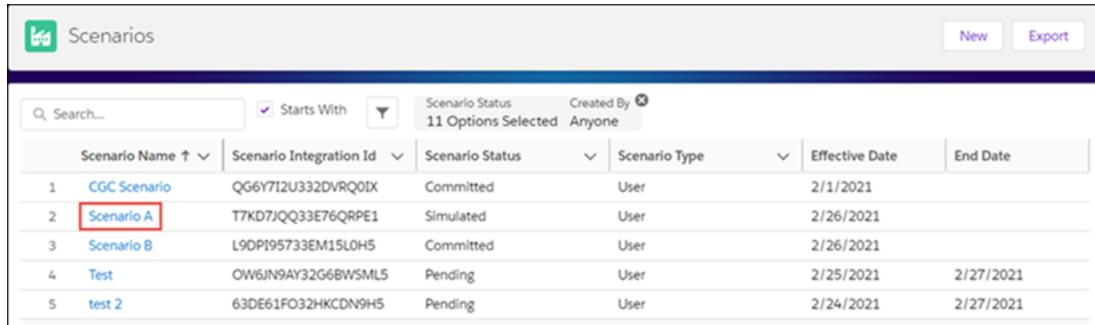
You can access Maps in three different ways.

- Select the drop down of the scenario that contains the map you want to view, then click **Map**.



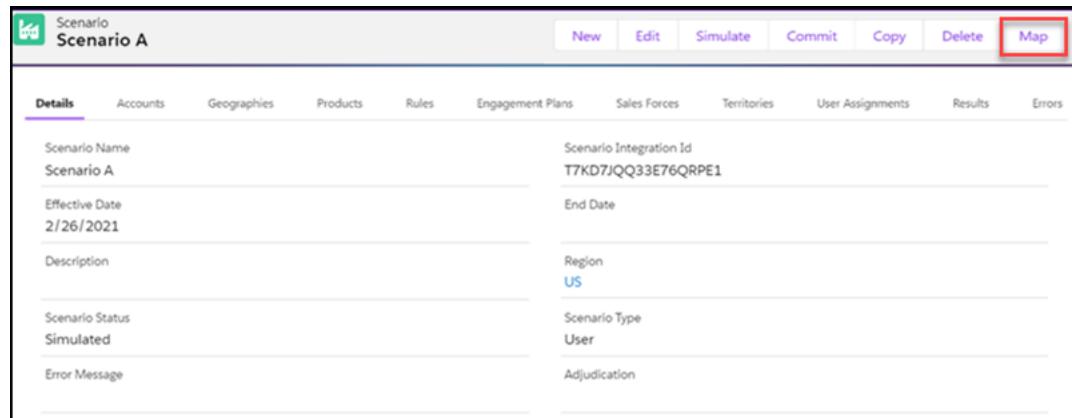
Scenario Name	Scenario Integration Id	Scenario Status	Scenario Type	Effective Date	End Date	Process...	Process...	Region Name
Account Explicitly For Va	GFTL7Y4X490KORBW...	Committed	User	7/13/2021	7/13/2021, 0...	7/13/2021, 11...	7/13/2021, 11...	US
Auto Created for Vaccin	KLLG4C9345P19LQQ75	Committed	Adjudication	7/2/2021	12/31/2021	7/2/2021, 11...	7/2/2021, 11...	
Devin Clark New PC Ter	PXNCXLUU04BP2FPT7...	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...	
Eleanor Waller MSL All	D13U5OHU45135GX...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...	
Eva Henry New PC Terr	DPB24GNR48P560UK...	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...	
Geo Edits	KR5FBASQ480GN1B...	Pending	User	7/12/2021				US
Jana Hansen New PC D	LZWC16E548P64LXB9	Committed	Internal	7/1/2021		7/12/2021, 0...	7/12/2021, 0...	
Marcus Cannon MSL AI	H106YH0245NV0BP0...	Committed	Internal	7/2/2021		7/2/2021, 09...	7/2/2021, 09...	
Marcus Cannon MSL AI	T4AYI0M946XSX94R1L	Committed	Internal	7/2/2021	7/6/2021	7/6/2021, 01...	7/6/2021, 01...	
Marcus Cannon MSL AI	27E19MLU46XTK13HU2	Committed	Internal	6/1/2021	6/30/2021	7/6/2021, 01...	7/6/2021, 01...	

- Select the scenario that contains the map you want to view,



Scenario Name	Scenario Integration Id	Scenario Status	Scenario Type	Effective Date	End Date
1 CGC Scenario	QG6Y7I2U332DVRQ0IX	Committed	User	2/1/2021	
2 Scenario A	T7KD7JQQ33E76QRPE1	Simulated	User	2/26/2021	
3 Scenario B	L9DP195733EM15L0H5	Committed	User	2/26/2021	
4 Test	OW6JN9AY32G6BWSML5	Pending	User	2/25/2021	2/27/2021
5 test 2	63DE61FO32HKCDN9HS	Pending	User	2/24/2021	2/27/2021

then click **Map**.

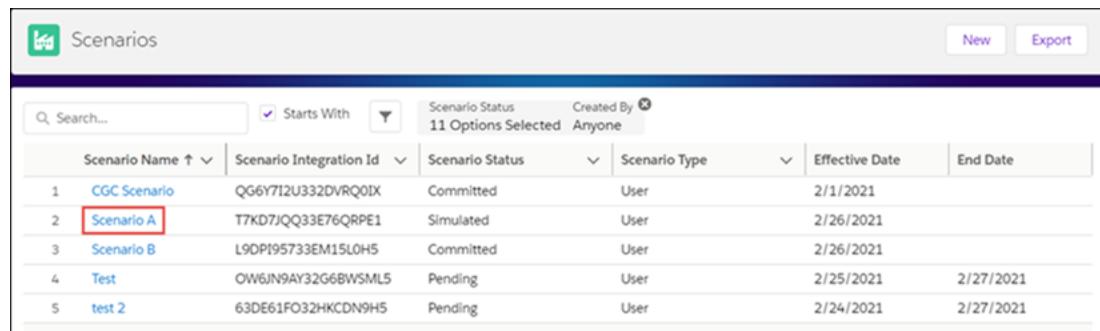


Scenario
Scenario A

New Edit Simulate Commit Copy Delete **Map**

Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
Scenario Name	Scenario Integration Id									
Scenario A	T7KD7JQQ33E76QRPE1									
Effective Date	End Date									
2/26/2021										
Description	Region									
	US									
Scenario Status	Scenario Type									
Simulated	User									
Error Message	Adjudication									

- Select the scenario that contains the map you want to view,



Scenarios

New Export

Scenario Name ↑	Scenario Integration Id	Scenario Status	Scenario Type	Effective Date	End Date
1 CGC Scenario	QG6Y7I2U332DVRQ0IX	Committed	User	2/1/2021	
2 Scenario A	T7KD7JQQ33E76QRPE1	Simulated	User	2/26/2021	
3 Scenario B	L9DP195733EM15L0H5	Committed	User	2/26/2021	
4 Test	OW6JN9AY32G6BWSML5	Pending	User	2/25/2021	2/27/2021
5 test 2	63DE61FO32HKCDN9HS	Pending	User	2/24/2021	2/27/2021

then, from the **Details** tab, scroll down to the **Overview** section and click the **Map** icon



Scenario
Scenario A

New Edit Simulate Commit Copy Delete Map

Details Accounts Geographies Products Rules Engagement Plans Sales Forces Territories User Assignments Results Errors

Scenario Name Scenario A Scenario Integration Id T7KD7JQQ33E76QRPE1

Effective Date 2/26/2021 End Date

Description Region US

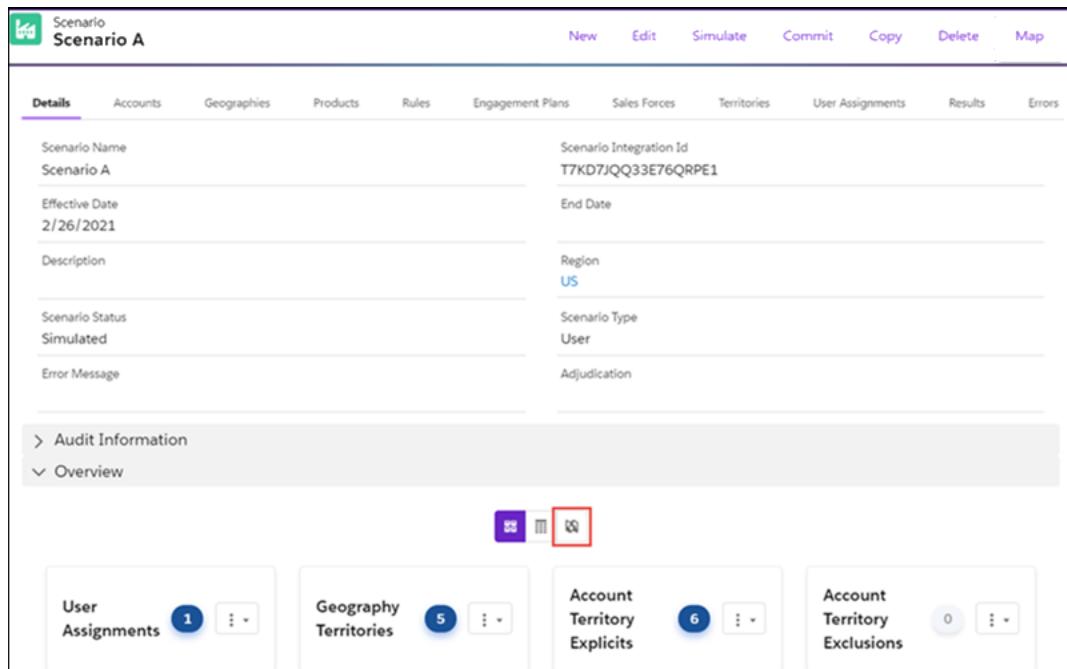
Scenario Status Simulated Scenario Type User

Error Message Adjudication

> Audit Information

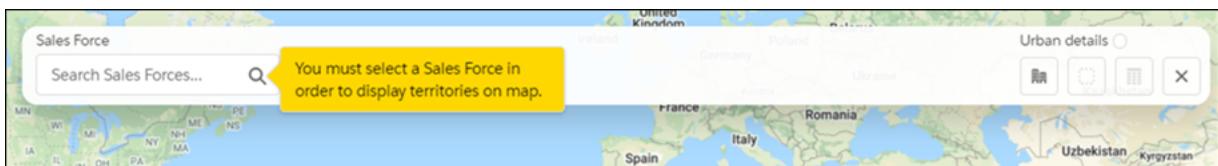
Overview

User Assignments 1 Geography Territories 5 Account Territory Explicit 6 Account Territory Exclusions 0

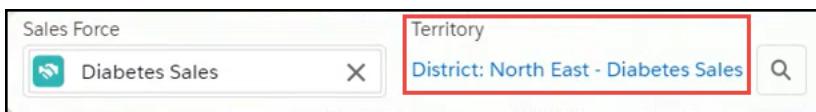


2. Select a Sales Force.

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.

Select Territory

Existing New

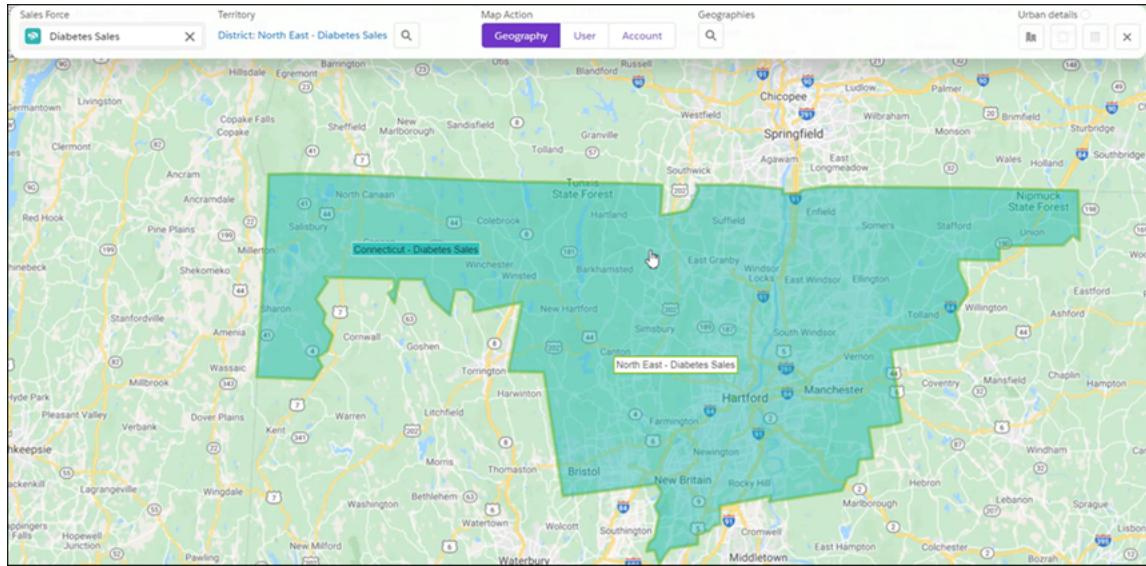
Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name
Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales
Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales
Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales
Delaware - Oncology 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

Cancel **Save**

- 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

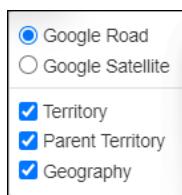
You can align geographies to a territory, move the geography to a different territory, and update the geography territory alignment effective and end dates using **Maps**.

To align geographies to a territory using Maps

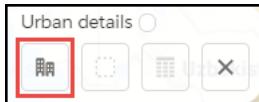
1. Select the territory you would like to work with. See [Access Maps from a Scenario](#) for details on selecting territories.
2. Click **Geography** from the **Map Action** section.



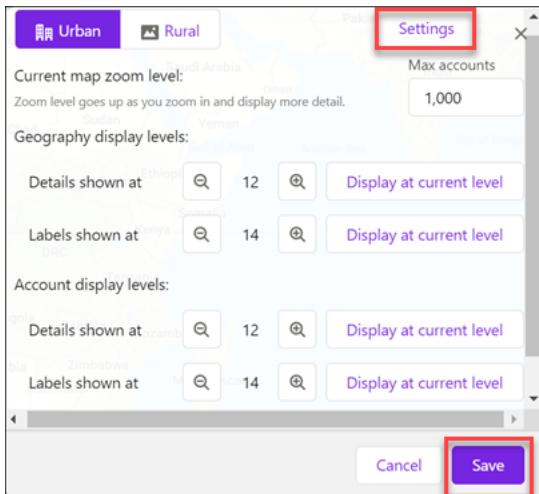
3. Click **Options**  on the upper right-hand side of the map and select **Geography**.



4. Click **Settings**  to select the mode in which you would like the geography boundaries displayed.

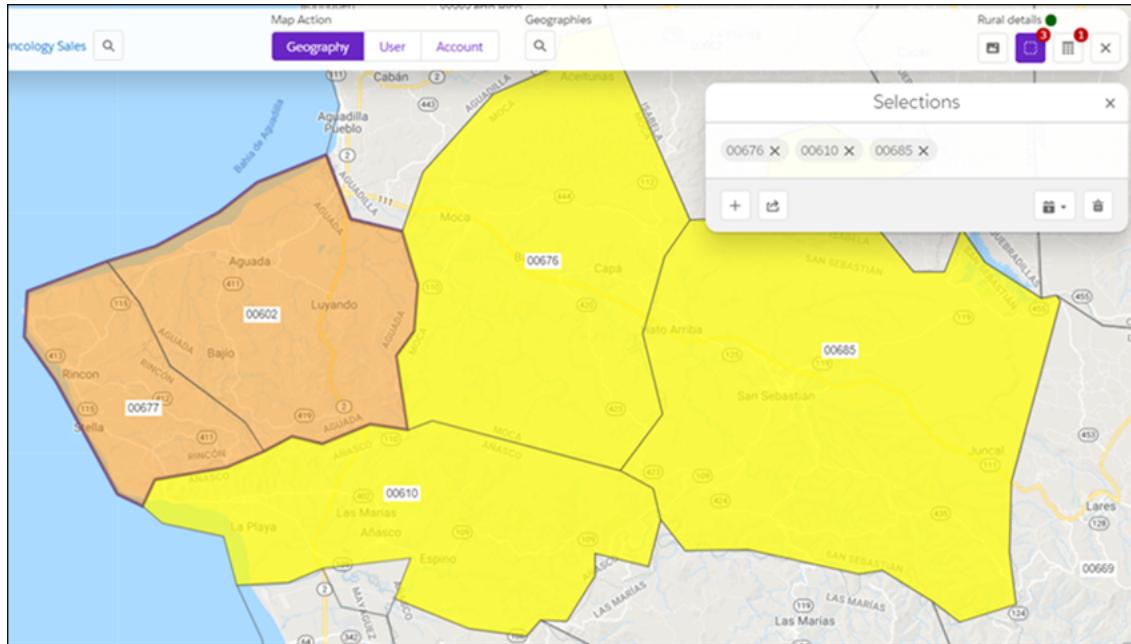


- Click **Urban** to view the territory at a detailed level, for example, if you are looking at a highly populated city.
 - Click **Rural** to view the territory at a higher level, for example, in areas where the geography boundaries are spread out.
5. Click **Settings**, set the zoom to the level you want the geography boundaries to display for Details and Labels, then click **Save**.

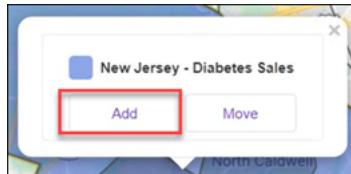


- Click **Zoom In** to set the level at a detailed view.
 - Click **Zoom Out** to set the level at a broad view.
 - Click **Display at current level** to match the current map zoom level.
6. Select the geographies you want to align to your territory using one of the following methods:

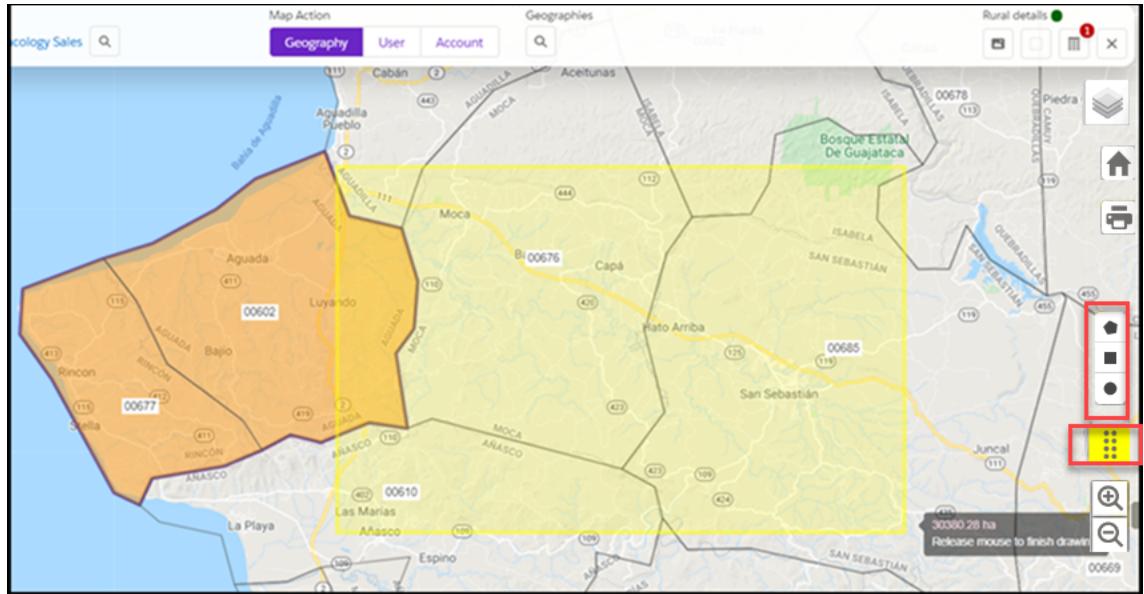
- Click the geography you want to align and drag it to the territory.



An add/move popup appears, where you can click **Add** to add the geography.

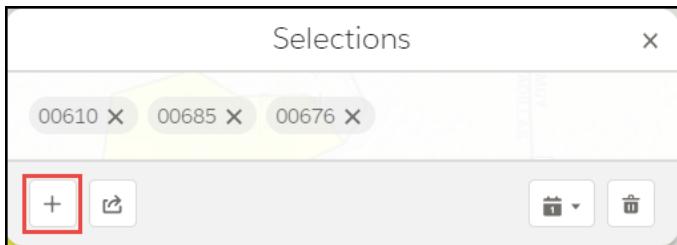


- Click **Features** , choose a selection shape, and then click and drag over the geographies you would like to align.



- After you finish selecting the geographies, click **Selections**  ³, and then select **Add+**.

Note: Click **Delete**  to remove the selections.



- Select the territory you want to add the geographies to, then click **Save**.

Select Territory

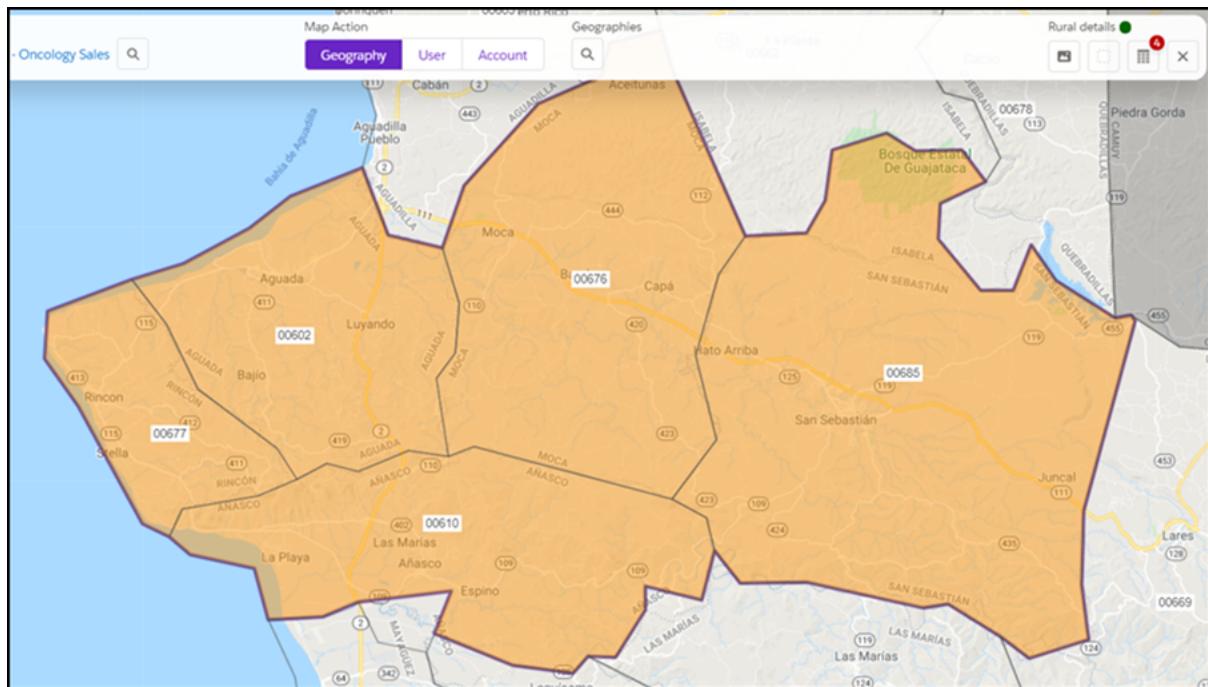
Existing New

Territory Name	Territory Integrator	Territory Type	Sales Force Name	User Name	Region Name	Effective Date	End Date
New PC Area Manager	Z0YJ9MP947V6VZLKC9	Area	New Primary Care SF		US	6/1/2021	
<input checked="" type="checkbox"/> New PC BU Head	31UUOC1S47V6QYC57T	Business Unit	New Primary Care SF		US	6/1/2021	
New PC District 1	3FG60N8347V6ZD6P1	District	New Primary Care SF	Jana Hansen	US	6/1/2021	
New PC District 2	EUVEGFEG4TV71SXSCP	District	New Primary Care SF		US	6/1/2021	
New PC Terr 1	VQHVHOT7E4TV7420L...	Territory	New Primary Care SF	Devin Clark	US	6/1/2021	
New PC Terr 2	GE30TAMY4TV76A70...	Territory	New Primary Care SF	Eva Henry	US	6/1/2021	
New PC Terr 3	08IMTGTW4TV78G96O9	Territory	New Primary Care SF		US	6/1/2021	
New PC Terr 4	2YDUUE0647V7AJVB1	Territory	New Primary Care SF		US	6/1/2021	

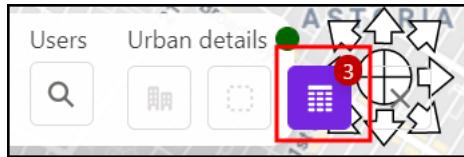
8 Records

Cancel Save

The geographies are added to the territory.



- Click the **Pending Instructions** icon and review the changes.



10. Do one of the following:

- To discard all changes, click **Discard All**.

Pending Instructions			
Type	Action	Name	Description
<input type="checkbox"/>	Geography	Add	10001 New PC BU Head
<input type="checkbox"/>	Geography	Add	10003 New PC BU Head
<input type="checkbox"/>	Geography	Add	10011 New PC BU Head

Discard All **Save**

- To discard a specific geography, select the corresponding check box, then click **Discard Selected**.

Pending Instructions			
Type	Action	Name	Description
<input type="checkbox"/>	Geography	Add	10001 New PC BU Head
<input checked="" type="checkbox"/>	Geography	Add	10003 New PC BU Head
<input type="checkbox"/>	Geography	Add	10011 New PC BU Head

Discard Selected **Save**

- To save the changes, click **Save**.

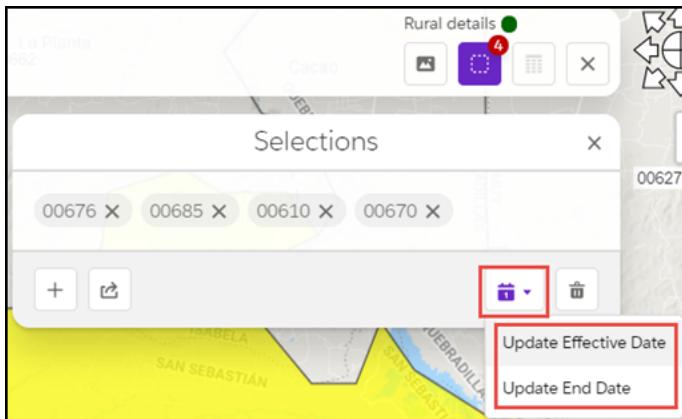
Pending Instructions			
Type	Action	Name	Description
<input type="checkbox"/>	Geography	Add	10001 New PC BU Head
<input type="checkbox"/>	Geography	Add	10003 New PC BU Head
<input type="checkbox"/>	Geography	Add	10011 New PC BU Head

Discard All **Save**

To update the effective date and end date of a geography

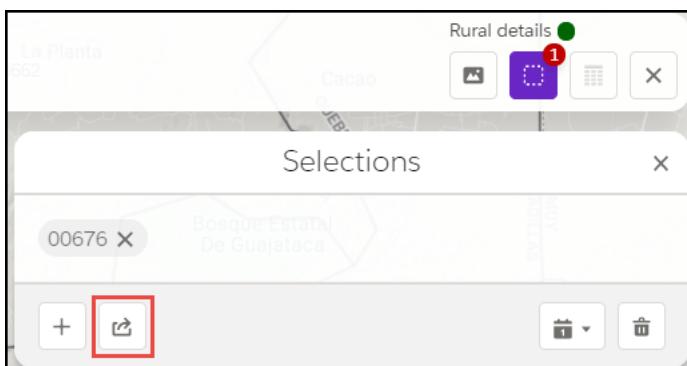
You can update a geography's effective/end dates to the scenario's effective/end dates.

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.



- Select the territory you would like to move the geography to, and then click **Save**.

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	100000000148439	District	Diabetes Sales
North East - Oncology Sales	16193000018497	District	Oncology Sales
North East Area	100691000027513	Area	Diabetes and Oncology

Cancel **Save**

Manage User Transactions Using Maps

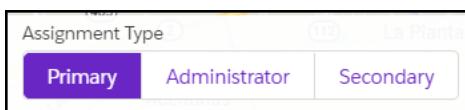
You can add users to a geography, move the user to a different geography, and update the user's effective and end dates using **Maps**.

To align users to a geography

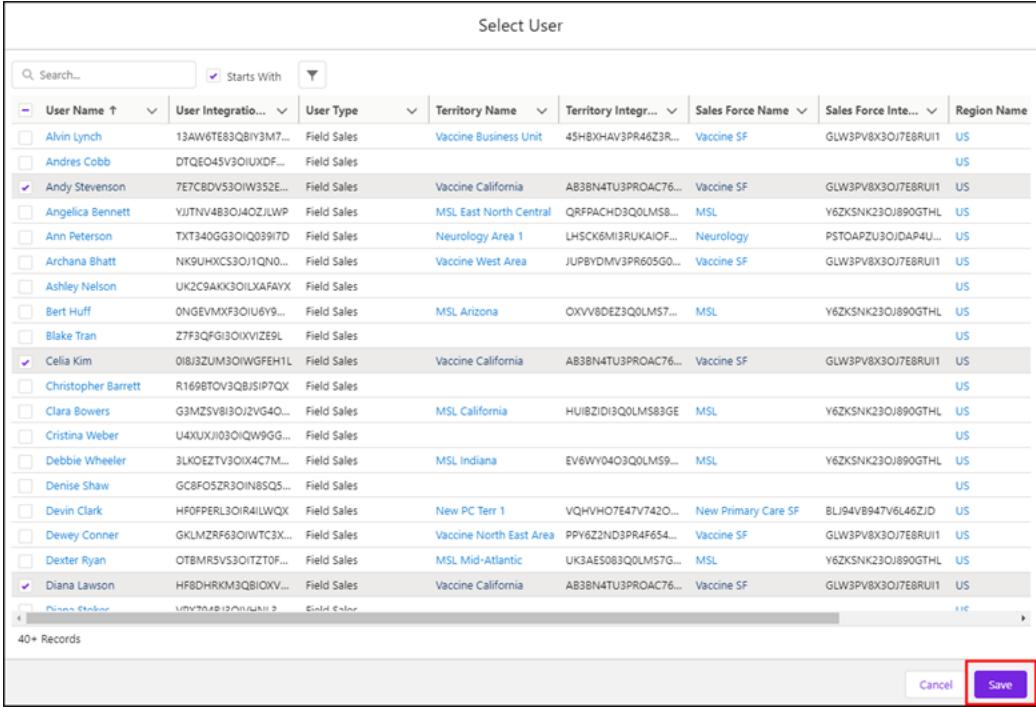
- Select the territory you would like to work with. See [Access Maps from a Scenario](#) for details on selecting territories.
- Click **User** from the **Map Action** section.



- Select the **Assignment Type**.



4. Click **Search**  for Users, select the users you want to align to the geography, then click **Save**.



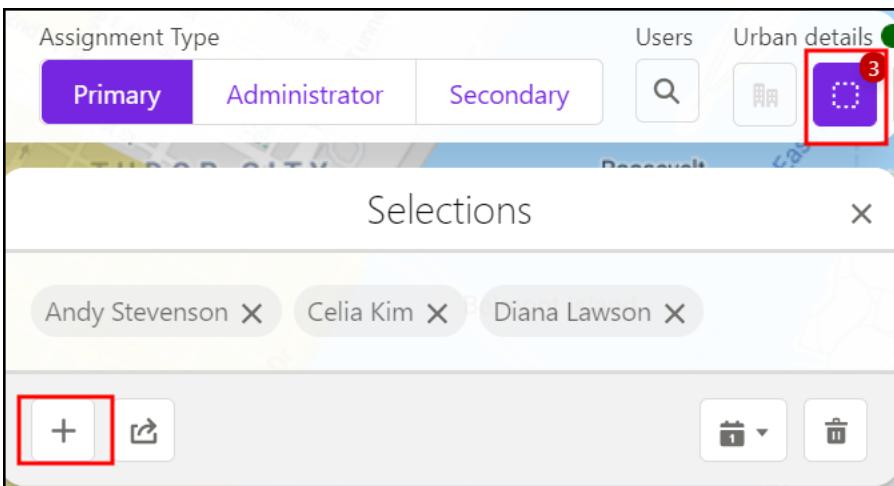
Select User							
<input type="text" value="Search..."/>	<input checked="" type="checkbox"/> Starts With						
User Name	User Integrat...	User Type	Territory Name	Territory Integrat...	Sales Force Name	Sales Force Integrat...	Region Name
<input type="checkbox"/> Alvin Lynch	13AW6TE83QBIY3M7...	Field Sales	Vaccine Business Unit	45HBXHAV3PR46Z3R...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
<input type="checkbox"/> Andres Cobb	DTQE045V3QIUXDF...	Field Sales					US
<input checked="" type="checkbox"/> Andy Stevenson	7E7CBDV53OIJW352E...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
<input type="checkbox"/> Angelica Bennett	YJ7TNV4B3OJ4OZLWP	Field Sales	MSL East North Central	QRFPACHD3Q0LMS8...	MSL	Y6ZKSNK23OJ890GTHL	US
<input type="checkbox"/> Ann Peterson	TXT340GG3OIQ03917D	Field Sales	Neurology Area 1	LHSCK6MI3RUKAIFO...	Neurology	PSTOAPZU3OJDAP4U...	US
<input type="checkbox"/> Archana Bhatt	NK9UHXC53OJ1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G0...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
<input type="checkbox"/> Ashley Nelson	UK2C9AKK3OILXAFAYK	Field Sales					US
<input type="checkbox"/> Bert Huff	0NGEVMXF3QIU6Y9...	Field Sales	MSL Arizona	OXVV8DEZ3Q0LMS7...	MSL	Y6ZKSNK23OJ890GTHL	US
<input type="checkbox"/> Blake Tran	Z7F3QFGI3OIKVIZE9L	Field Sales					US
<input checked="" type="checkbox"/> Celia Kim	0IB3ZUM3OIJWGFH1L	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
<input type="checkbox"/> Christopher Barrett	R169BT0V3QBSJ5P7QX	Field Sales					US
<input type="checkbox"/> Clara Bowers	G3MZSV8I3OJ2VG4O...	Field Sales	MSL California	HUI8ZID3Q0LMS83GE	MSL	Y6ZKSNK23OJ890GTHL	US
<input type="checkbox"/> Cristina Weber	U4XUXJ103OIQW9GG...	Field Sales					US
<input type="checkbox"/> Debbie Wheeler	3LKOEZTV3OIX4C7M...	Field Sales	MSL Indiana	EV6WY04O3Q0LMS9...	MSL	Y6ZKSNK23OJ890GTHL	US
<input type="checkbox"/> Denise Shaw	GC8FO5ZR3OIN8SQ5...	Field Sales					US
<input type="checkbox"/> Devin Clark	HPOFPERL3OIR4ILWQX	Field Sales	New PC Terr 1	VQHVHOT7E47V7420...	New Primary Care SF	BLJ94V8947V6L46ZD	US
<input type="checkbox"/> Dewey Conner	GKLMZRF63OJWTC3X...	Field Sales	Vaccine North East Area	PPY6Z2ND3PR4F654...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
<input type="checkbox"/> Dexter Ryan	OTBMR5VS3OITZT0F...	Field Sales	MSL Mid-Atlantic	UK3AES083Q0LMS7G...	MSL	Y6ZKSNK23OJ890GTHL	US
<input checked="" type="checkbox"/> Diana Lawson	HP8DHRKM3QBJ0XV...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US
<input type="checkbox"/> Diana Stander	1M7Y7A012010011112	Field Sales					

40+ Records

Cancel **Save**

5. Click **Selections**  4, then click **Add +**.

Note: Click **Delete**  to remove the selections.



Assignment Type

Primary Administrator Secondary

Users Urban details

Selections

Andy Stevenson X Celia Kim X Diana Lawson X

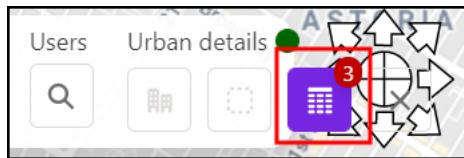
+ Edit Delete

6. Select the territory you want to add the users to, then click **Save**.

Select Territory

Territory List						
Existing		New				
		Search...		Territory Integration		
<input type="checkbox"/>	New PC Area Manager	Z0YJ9MP947V6VZLKC9	Area	New Primary Care SF		US
<input type="checkbox"/>	New PC BU Head	31UUQC1S47V6QYC5...	Business Unit	New Primary Care SF		US
<input checked="" type="checkbox"/>	New PC District 1	3FG60N8347V6ZD6P11	District	New Primary Care SF	Jana Hansen	US
<input type="checkbox"/>	New PC District 2	EUYEGFEG47V71SXSCP	District	New Primary Care SF		US
<input type="checkbox"/>	New PC Terr 1	VQHVHO7E47V742O...	Territory	New Primary Care SF	Devin Clark	US
<input type="checkbox"/>	New PC Terr 2	GE3O7AMY47V76A7...	Territory	New Primary Care SF	Eva Henry	US
8 Records						
						<input type="button" value="Save"/>

- Click the **Pending Instructions** icon and review the changes.



- Do one of the following:

- To discard all changes, click **Discard All**.

Pending Instructions

Type	Action	Name	Description
<input type="checkbox"/>	User	Add	Primary: New PC District 1
<input type="checkbox"/>	User	Add	Primary: New PC District 1
<input type="checkbox"/>	User	Add	Primary: New PC District 1

- To discard a specific user, select the corresponding check box, then click **Discard**

Selected.

Pending Instructions			
Type	Action	Name	Description
<input checked="" type="checkbox"/>	User	Add	Andy Stevenson Primary: New PC District 1
<input type="checkbox"/>	User	Add	Celia Kim Primary: New PC District 1
<input type="checkbox"/>	User	Add	Diana Lawson Primary: New PC District 1

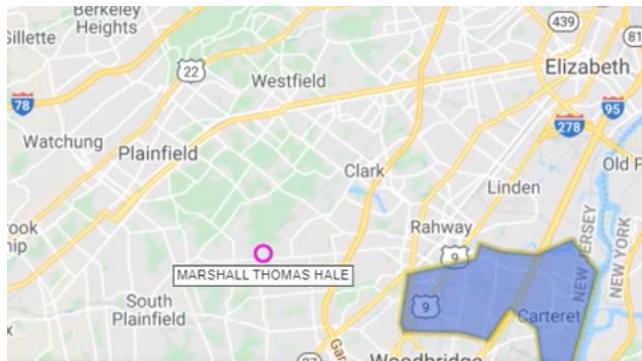
Discard Selected **Save**

- To save the changes, click **Save**.

Pending Instructions			
Type	Action	Name	Description
<input type="checkbox"/>	User	Add	Archana Bhatt Primary: New PC Terr 4
<input type="checkbox"/>	User	Add	Ashley Nelson Primary: New PC Terr 4
<input type="checkbox"/>	User	Add	Bert Huff Primary: New PC Terr 4

Discard All **Save**

The users are denoted by PINS on the map.



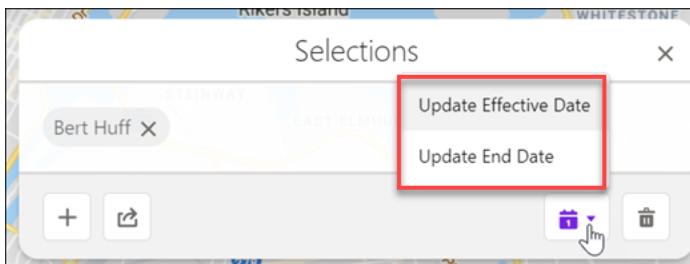
To update effective date and end date of a user

You can update a user's effective/end dates to the scenario's effective/end dates.

- From the Select User window, select the user whose effective date or end date you would like to update, and then click **Save**.

Select User							
<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With		User Type	Territory Name	Territory Integrat...	Sales Force Name	Sales Force Integrat...	Region Name
<input checked="" type="checkbox"/>	User Name ↑	<input type="text"/> User Integrat...	<input type="text"/> MSL Field Sales	<input type="text"/> MSL East North Central	<input type="text"/> LHSCK6MI3RUKAIOF...	<input type="text"/> Neurology	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Ann Peterson	<input type="text"/> TXT340GG3OIQ03917D	<input type="text"/> Field Sales	<input type="text"/> Neurology Area 1	<input type="text"/> JUPBYDMV3PR605G0...	<input type="text"/> Vaccine SF	<input type="text"/> GLW3PV8X3QJ7E8RU11 US
<input type="checkbox"/>	Archana Bhatt	<input type="text"/> NK9UHXC53QJ1QN0...	<input type="text"/> Field Sales	<input type="text"/> Vaccine West Area	<input type="text"/> Y6ZKSNK23OJ890GTHL US	<input type="text"/> Y6ZKSNK23OJ890GTHL US	<input type="text"/> US
<input type="checkbox"/>	Ashley Nelson	<input type="text"/> UK2C9AKK3QJILXAFAYX	<input type="text"/> Field Sales	<input type="text"/> MSL Arizona	<input type="text"/> OXVV8DEZ3Q0LMS7...	<input type="text"/> MSL	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Bert Huff	<input type="text"/> ONGEVNXF3QJU6Y9...	<input type="text"/> Field Sales	<input type="text"/> MSL California	<input type="text"/> AB3BN4TU3PROAC76...	<input type="text"/> Vaccine SF	<input type="text"/> GLW3PV8X3QJ7E8RU11 US
<input type="checkbox"/>	Blake Tran	<input type="text"/> ZTF3QFQG3QJXVIZE9L	<input type="text"/> Field Sales	<input type="text"/> Vaccine California	<input type="text"/> HUIBZID13Q0LMS83GE	<input type="text"/> MSL	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Celia Kim	<input type="text"/> 0I8J3ZUM3QJ1WGFEH1L	<input type="text"/> Field Sales	<input type="text"/> MSL California	<input type="text"/> EV6WY0403Q0LMS9...	<input type="text"/> MSL	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Christopher Barrett	<input type="text"/> R169BT0V3QBJSIP7QX	<input type="text"/> Field Sales	<input type="text"/> MSL Indiana	<input type="text"/> PPY6Z2ND3PRAF654...	<input type="text"/> Vaccine SF	<input type="text"/> GLW3PV8X3QJ7E8RU11 US
<input type="checkbox"/>	Clara Bowers	<input type="text"/> G3MZSV81B0J2VG4O...	<input type="text"/> Field Sales	<input type="text"/> MSL Indiana	<input type="text"/> Y6ZKSNK23OJ890GTHL US	<input type="text"/> Y6ZKSNK23OJ890GTHL US	<input type="text"/> US
<input type="checkbox"/>	Cristina Weber	<input type="text"/> UAXUXJI03QJQW9GG...	<input type="text"/> Field Sales	<input type="text"/> MSL Indiana	<input type="text"/> BLJ94VB947V6L46ZJD	<input type="text"/> New Primary Care SF	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Debbie Wheeler	<input type="text"/> 3LKOEZTV3QJX4C7M...	<input type="text"/> Field Sales	<input type="text"/> New PC Terr 1	<input type="text"/> VQHVHO7E47V742O...	<input type="text"/> Vaccine SF	<input type="text"/> GLW3PV8X3QJ7E8RU11 US
<input type="checkbox"/>	Denise Shaw	<input type="text"/> GC8FO5ZR3QJN8SQ5...	<input type="text"/> Field Sales	<input type="text"/> MSL Mid-Atlantic	<input type="text"/> UK3AE5083Q0LMS7G...	<input type="text"/> MSL	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input checked="" type="checkbox"/>	Devin Clark	<input type="text"/> HF0PERL3QJ04ILWQX	<input type="text"/> Field Sales	<input type="text"/> Vaccine North East Area	<input type="text"/> AB3BN4TU3PROAC76...	<input type="text"/> Vaccine SF	<input type="text"/> GLW3PV8X3QJ7E8RU11 US
<input type="checkbox"/>	Dewey Conner	<input type="text"/> GKLMLZRF63QJWTC3X...	<input type="text"/> Field Sales	<input type="text"/> Vaccine North East Area	<input type="text"/> HUIBZID13Q0LMS83GE	<input type="text"/> MSL	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Dexter Ryan	<input type="text"/> OTBMR5VS3QJ1TZT05...	<input type="text"/> Field Sales	<input type="text"/> MSL Mid-Atlantic	<input type="text"/> EV6WY0403Q0LMS9...	<input type="text"/> MSL	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Diana Lawson	<input type="text"/> HF8DHRKM3QBJOXV...	<input type="text"/> Field Sales	<input type="text"/> Vaccine California	<input type="text"/> BLJ94VB947V6L46ZJD	<input type="text"/> Vaccine SF	<input type="text"/> GLW3PV8X3QJ7E8RU11 US
<input type="checkbox"/>	Diana Stokes	<input type="text"/> VPX794RJ3QJIVHNLL...	<input type="text"/> Field Sales	<input type="text"/> MSL Maine	<input type="text"/> Y6ZKSNK23OJ890GTHL US	<input type="text"/> Y6ZKSNK23OJ890GTHL US	<input type="text"/> US
<input type="checkbox"/>	Douglas Hayes	<input type="text"/> 095KE7PB3QJ0RS24UH	<input type="text"/> Field Sales	<input type="text"/> MSL Maine	<input type="text"/> 6ZR2X0043Q0LMSA0...	<input type="text"/> MSL	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Eleanor Waller	<input type="text"/> SAHGUT854510353LRT	<input type="text"/> Field Sales	<input type="text"/> MSL Alabama	<input type="text"/> 6CZV1T2K3Q0LMS78...	<input type="text"/> MSL	<input type="text"/> Y6ZKSNK23OJ890GTHL US
<input type="checkbox"/>	Elena Roberson	<input type="text"/> F11D2WEJ3QJ0ING6BD	<input type="text"/> Field Sales	<input type="text"/> MSL Alabama	<input type="text"/> Y6ZKSNK23OJ890GTHL US	<input type="text"/> Y6ZKSNK23OJ890GTHL US	<input type="text"/> US

2. Click **Calendar** in the Selections window and select **Update Effective Date** or **Update End Date**.

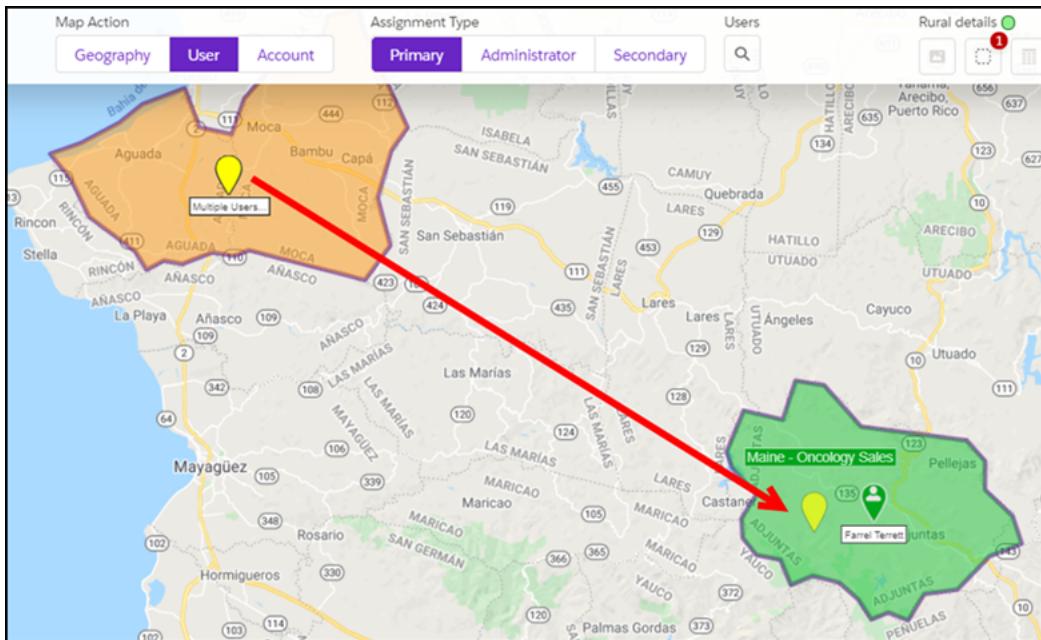


To move a user to a different geography

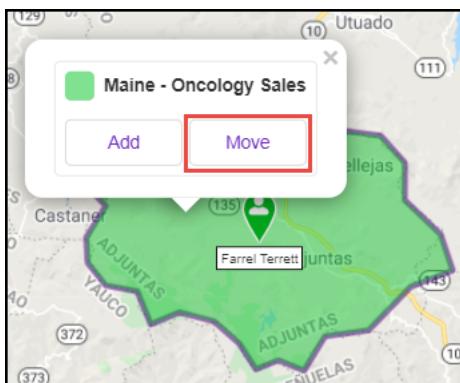
You can move a user to a different geography using drag and move or select to move.

Drag and move:

1. Click the user's PIN and drag it to another geography.



2. Click Move.



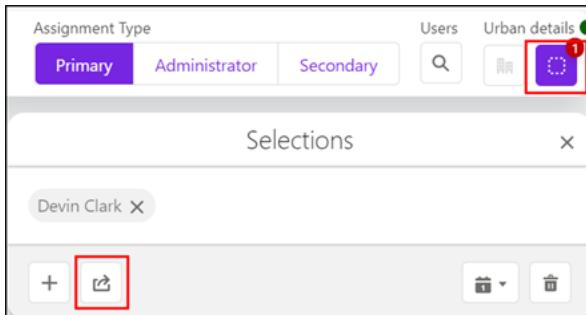
3. Continue to step 2. below.

Select to move:

- Select the user you want to move, then click **Save**.

Select User								
<input type="text"/> Search...	<input checked="" type="checkbox"/> Starts With							
User Name	User Integration ID	User Type	Territory Name	Territory Integration ID	Sales Force Name	Sales Force Internal ID	Region Name	
Angelica Bennett	TJINIV495JUHCJLWP	Field Sales	MSL East North Central	LH5CK6M1RUKAIOF...	Neurology	PSTOAPZU3OJDAP4U...	US	
Ann Peterson	TXT340GG30IQQ3917D	Field Sales	Neurology Area 1	LH5CK6M1RUKAIOF...	Neurology	PSTOAPZU3OJDAP4U...	US	
Archana Bhatt	NK9UHCKS30J1QN0...	Field Sales	Vaccine West Area	JUPBYDMV3PR605G...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US	
Ashley Nelson	UK2C9AKK30ILXAFAY...	Field Sales					US	
Bert Huff	0NGEVMXF30IU6Y9...	Field Sales	MSL Arizona	0XVV8DEZ3Q0LMS7...	MSL	Y6ZSNK23OJ890GTHL	US	
Blake Tran	Z7F3QFGI3OIXVIZE9L	Field Sales					US	
Celia Kim	0IBJ3ZUM30IWGFEH1L	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US	
Christopher Barrett	R169BT0V3QBJ5IP7QX...	Field Sales					US	
Clara Bowers	G3MZSV810J2V4G40...	Field Sales	MSL California	HUIBZID13Q0LMS83GE	MSL	Y6ZSNK23OJ890GTHL	US	
Cristina Weber	U4XUXJ1030IQW9GG...	Field Sales					US	
Debbie Wheeler	3LKOEZTV30IX4C7M...	Field Sales	MSL Indiana	EV6WY04O3Q0LMS9...	MSL	Y6ZSNK23OJ890GTHL	US	
Denise Shaw	GC8FO5ZR30IN8SQ5...	Field Sales					US	
<input checked="" type="checkbox"/> Devin Clark	HF0FPERL30IR4ILWQX	Field Sales	New PC Terr 1	VQHVHO7E47V7420...	New Primary Care SF	BLJ94VB947V6L46Z/D	US	
Dewey Conner	GKLMLZRF630IWTC3...	Field Sales	Vaccine North East Area	PPY6Z2ND3PRAF654...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US	
Dexter Ryan	OTBMR5VS30ITZT0F...	Field Sales	MSL Mid-Atlantic	UK3AE5083Q0LMS7G...	MSL	Y6ZSNK23OJ890GTHL	US	
Diana Lawson	HF8DHRKM3QBI0XV...	Field Sales	Vaccine California	AB3BN4TU3PROAC76...	Vaccine SF	GLW3PV8X3OJ7E8RU11	US	
Diana Stokes	VPX794RJ30IVHNL3...	Field Sales					US	
Douglas Hayes	095KE7PB30IRIS24UH	Field Sales	MSL Maine	6ZR2X0043Q0LMSAO...	MSL	Y6ZSNK23OJ890GTHL	US	
Eleanor Waller	SAHGTU854510353LRT	Field Sales	MSL Alabama	6CZV1TZK3Q0LMS78...	MSL	Y6ZSNK23OJ890GTHL	US	
Elena Roberson	F1D2WEIJ30IOING6BD	Field Sales					US	

- Open the Selections window, then click **Move**.



3. Select the territory to which you want to move the user, then click **Save**.

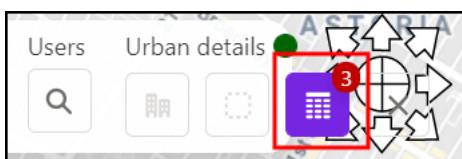
Select Territory

Existing		New			
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With			
Territory Name ↑	Territory Integr...	Territory Type	Sales Force Name	User Name	Region N
<input type="radio"/> New PC Area Manager	Z0YJ9MP947V6VZLKC9	Area	New Primary Care SF		US
<input type="radio"/> New PC BU Head	31UUQC1S47V6QYC5...	Business Unit	New Primary Care SF		US
<input type="radio"/> New PC District 1	3FG60N8347V6ZD6PI1	District	New Primary Care SF	Jana Hansen	US
<input type="radio"/> New PC District 2	EUYEGFEG47V71SXSCP	District	New Primary Care SF		US
<input checked="" type="radio"/> New PC Terr 1	VQHWHO7E47V742O...	Territory	New Primary Care SF	Devin Clark	US
<input type="radio"/> New PC Terr 2	GE3O7AMY47V76A7...	Territory	New Primary Care SF	Eva Henry	US

8 Records

Cancel Save

4. Click the **Pending Instructions** icon and review the changes.



5. Do one of the following:

- To discard all changes, click **Discard All**.

Pending Instructions

Type	Action	Name	Description
User	Add	Devin Clark	Primary: New PC Terr 2

Discard All Save

- To save the changes, click **Save**.

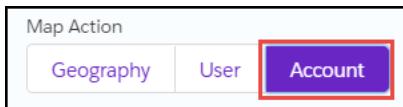
Pending Instructions			
Type	Action	Name	Description
<input type="checkbox"/>	User	Add	Devin Clark Primary: New PC Terr 2
Discard All			Save

Manage Account Transactions Using Maps

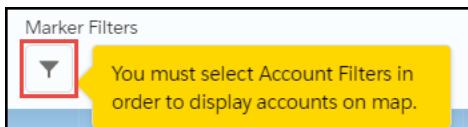
You can add accounts to a geography, move the account to a different geography, and update the account's effective and end dates using **Maps**.

To align accounts to a geography

- Select the territory you would like to work with. See [Access Maps from a Scenario](#) for details on selecting territories.
- Click **Account** from the **Map Action** section.



- Click **Account Filters**  to filter the account information.



- Enter information for the account, and then click **Run**.

Filters

Account Name	Account Integration Id
<input type="text"/>	<input type="text"/>
Account Type	Specialty
Select an Option	Select an Option
Region	State
<input type="text"/> Search Regions... <input type="button" value="🔍"/>	<input type="text"/>
City	Postal Code
<input type="checkbox"/> Show Only Aligned Accounts	<input type="checkbox"/> Show Only Un-Aligned Accounts
<input type="button" value="Clear Filters"/> <input type="button" value="Cancel"/> <input type="button" value="Run"/>	

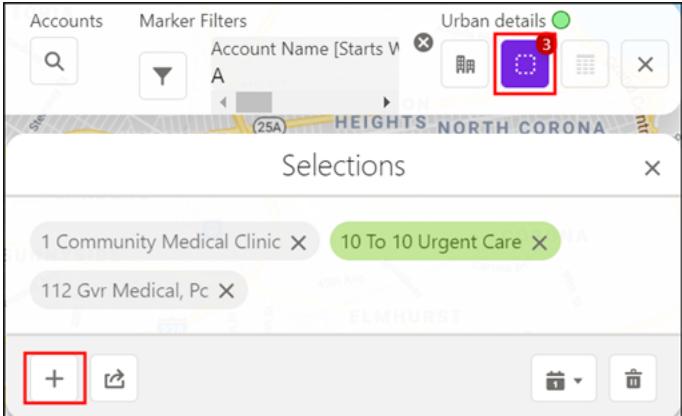
5. Click **Search**  for Accounts, select the accounts you want to add to a geography, then click **Save**.

Select Account

<input type="text"/> Search... <input checked="" type="checkbox"/> Starts With <input type="button" value="▼"/>				
Account Name ↑	Account Integr...	Account Type	Account Specialty	Account Address
<input checked="" type="checkbox"/> 1 Community Medical Cl	WUSE00091052	Department	Other specialty	BALDWIN PARK CA 91706, LOS ANC
<input type="checkbox"/> 1 World Medicine	WUSE00421772	Practice	Internal medicine - fa...	LAS VEGAS NV 89102
<input checked="" type="checkbox"/> 10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine	LUTZ FL 33559
<input type="checkbox"/> 10th Street Comprehensi	WUSE00677376	Practice	Addiction medicine	MILWAUKEE WI 53221
<input checked="" type="checkbox"/> 112 Gvr Medical, Pc	WUSE00186864	Practice	Family medicine	FLUSHING NY 11355, FOREST HILLS
<input type="checkbox"/> 12 Mile Creek Family Me	WUSE00403605	Practice	Other specialty	COLUMBIA SC 29201
<input type="checkbox"/> 125Th Street Clinic	WUSH00014300	Department	Other specialty	NEW YORK NY 10027, NEW YORK N
<input type="checkbox"/> 125th Street Clinic	WUSE00176618	Practice	Other specialty	NORTH MIAMI FL 33161
20+ Records				
				<input type="button" value="Cancel"/> <input type="button" value="Save"/>

6. Click **Selections** , then click **Add+**.

Note: Click **Delete**  to remove the selections.



- Select the territory you would like to add the accounts to, then click **Save**.

Select Territory

Existing							New
Search...		<input checked="" type="checkbox"/> Starts With					
Territory Name ↑	Territory Integr...	Territory Type	Sales Force Name	User Name	Region N		
<input type="radio"/> New PC Area Manager	Z0YJ9MP947V6VZLKC9	Area	New Primary Care SF		US		
<input type="radio"/> New PC BU Head	31UUQC1S47V6QYC5...	Business Unit	New Primary Care SF		US		
<input type="radio"/> New PC District 1	3FG60N8347V6ZD6PI1	District	New Primary Care SF	Jana Hansen	US		
<input type="radio"/> New PC District 2	EUYEGFEG47V71SXSCP	District	New Primary Care SF		US		
<input checked="" type="radio"/> New PC Terr 1	VQHVHO7E47V742O...	Territory	New Primary Care SF	Devin Clark	US		
<input type="radio"/> New PC Terr 2	GE3O7AMY47V76A7...	Territory	New Primary Care SF	Eva Henry	US		
8 Records							
						<input type="button" value="Cancel"/> <input checked="" type="button" value="Save"/>	

- Click **Pending Instructions**  and review the changes.
- Do one of the following:

- To discard all changes, click **Discard All**.

Pending Instructions				
<input type="checkbox"/> Type	Action	Name	Description	
<input type="checkbox"/>	Account	Add	1 Community Medical Clinic	New PC Terr 1
<input type="checkbox"/>	Account	Add	10 To 10 Urgent Care	New PC Terr 1
<input type="checkbox"/>	Account	Add	12 Mile Creek Family Medicien	New PC Terr 1

Discard All Save

- To discard a specific account, select the corresponding check box, then click **Discard Selected**.

Pending Instructions				
<input type="checkbox"/> Type	Action	Name	Description	
<input checked="" type="checkbox"/>	Account	Add	1 Community Medical Clinic	New PC Terr 1
<input type="checkbox"/>	Account	Add	10 To 10 Urgent Care	New PC Terr 1
<input type="checkbox"/>	Account	Add	12 Mile Creek Family Medicien	New PC Terr 1

Discard Selected Save

- To save the changes, click **Save**.

Pending Instructions				
<input type="checkbox"/> Type	Action	Name	Description	
<input type="checkbox"/>	Account	Add	1 Community Medical Clinic	New PC Terr 1
<input type="checkbox"/>	Account	Add	10 To 10 Urgent Care	New PC Terr 1
<input type="checkbox"/>	Account	Add	12 Mile Creek Family Medicien	New PC Terr 1

Discard All Save

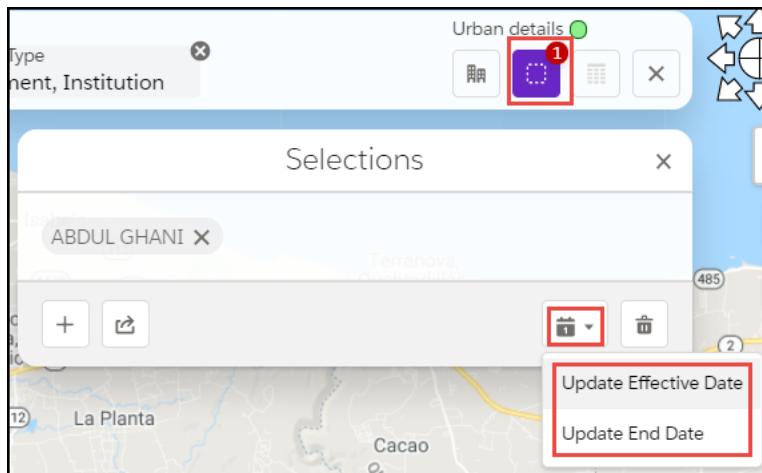
To update effective date and end date of an account

You can update an account's effective/end dates to the scenario's effective/end dates.

- From the Select Account window, select the account whose effective date or end date you would like to update, and then click **Save**.

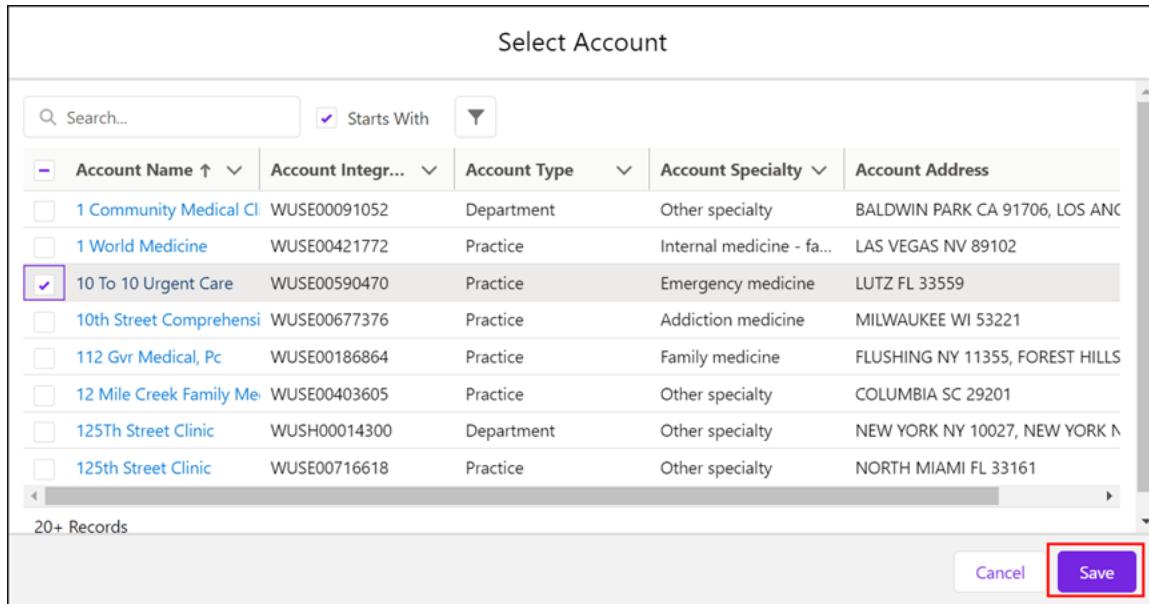
Select Account				
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With	<input type="button"/>	
Account Name	Account Integr...	Account Type	Account Specialty	Account Address
1 Community Medical Cl	WUSE00091052	Department	Other specialty	BALDWIN PARK CA 91706, LOS ANC
1 World Medicine	WUSE00421772	Practice	Internal medicine - fa...	LAS VEGAS NV 89102
10 To 10 Urgent Care	WUSE00590470	Practice	Emergency medicine	LUTZ FL 33559
10th Street Comprehensi	WUSE00677376	Practice	Addiction medicine	MILWAUKEE WI 53221
112 Gvr Medical, Pc	WUSE00186864	Practice	Family medicine	FLUSHING NY 11355, FOREST HILLS
12 Mile Creek Family Me	WUSE00403605	Practice	Other specialty	COLUMBIA SC 29201
125Th Street Clinic	WUSH00014300	Department	Other specialty	NEW YORK NY 10027, NEW YORK N
125th Street Clinic	WUSE00716618	Practice	Other specialty	NORTH MIAMI FL 33161
20+ Records				
				<input type="button"/> Save

2. Click **Calendar** in the Selections window and select **Update Effective Date** or **Update End Date**.

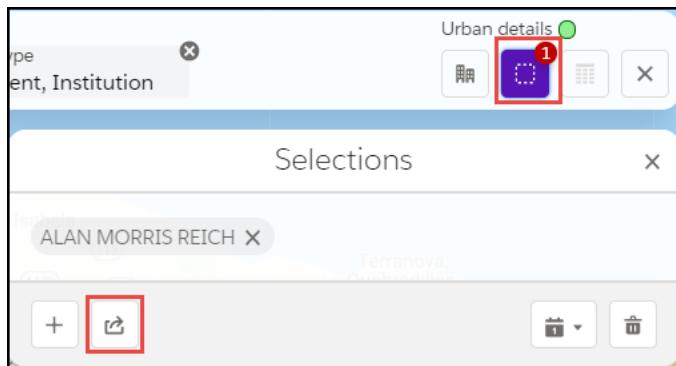


To move an account to a different geography

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**.



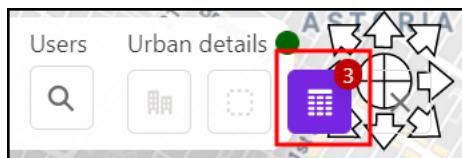
3. Select the territory you want to move the account to, then click **Save**.

Select Territory						
Existing		New				
<input type="text"/> Search...		<input checked="" type="checkbox"/> Starts With				
Territory Name ↑	Territory Integr...	Territory Type	Sales Force Name	User Name	Region	N
New PC Area Manager	Z0YJ9MP947V6VZLKC9	Area	New Primary Care SF		US	
New PC BU Head	31UUQC1S47V6QYC5...	Business Unit	New Primary Care SF		US	
New PC District 1	3FG60N8347V6ZD6PI1	District	New Primary Care SF	Jana Hansen	US	
New PC District 2	EUYEGFEG47V71SXSCP	District	New Primary Care SF		US	
<input checked="" type="radio"/> New PC Terr 1	VQHVHO7E47V742O...	Territory	New Primary Care SF	Devin Clark	US	
New PC Terr 2	GE3O7AMY47V76A7...	Territory	New Primary Care SF	Eva Henry	US	

8 Records

Cancel 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**.

Pending Instructions			
Type	Action	Name	Description
<input type="checkbox"/>	Account	Add	10 To 10 Urgent Care New PC Terr 1
Discard All			Save

- To save the changes, click **Save**.

Pending Instructions

Type	Action	Name	Description
Account	Add	10 To 10 Urgent Care	New PC Terr 1

Discard All **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

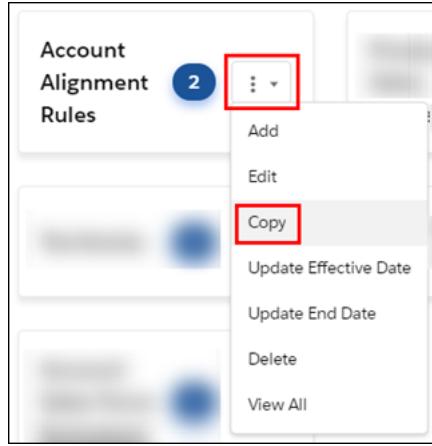
1. Click **Scenarios** from the primary navigation bar.
2. From the Scenarios screen, select the scenario that contains the rule you want to copy.

Scenarios

Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
11 Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...	6/30/2021, 0...	
12 New Activity	JSTF9HV48PPIAEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13 New PC SF Gold & Silve	EOCQBX4E4807ZT09...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	
14 New Scenario	LY8PJWVQ4BHJHQFEL...	Pending	User	7/21/2021	10/31/2021		7/9/2021, 02...	US
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	
16 New Vaccine SF Engage	4MYHAS7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

20 Records

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.

Action	Account Rule Name	Account Rule Integration Id	Description	Sales Force Name	Sales Force Integration Id
1 Edit	Alignment Rule A	PUKX4JZR2EKJPAOA61		Diabetes Sales	10000000087424
2 Add	SF Rule	MOJI2J4V2F6YKOU3CP		Diabetes Sales	10000000087424

2 Records

[View All](#)

- 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.

Account Rule Copy

Rule > Details > Level 1 > Summary

Select the Rule you want to modify:

Existing **New**

Account Rule Name	Account Rule Integration Id	Description	Sales Force Name	Sales Force Integration Id	Region Name
Alignment Rule A	PUKX4JZR2EKJPAOA61		Diabetes Sales	10000000087424	US
ANS Rule	F8HS7J51292HVO3KSP		Diabetes Sales	10000000087424	US

2 Records

Delete Level **Add Level** **Cancel** **Next**

- Enter the information for the rule and click **Next**.

Account Rule Copy

✓ > Details > Level 1 > Level 2 > Level 3 > Summary

Enter the information for the rule

Information

* Account Rule Name SF24 Acct Rule	Account Rule Integration Id NK6FPN782G5BSVXLMH
Description	* Sales Force Diabetes Sales
Account Territory Limited To Region <input type="checkbox"/>	

External IDs

External ID1

Buttons

Delete Level **Add Level** **Previous** **Next** **Save**

For information about rule fields, see [Add Account Alignment Rules or Account Product Restriction Rules to a Scenario](#).

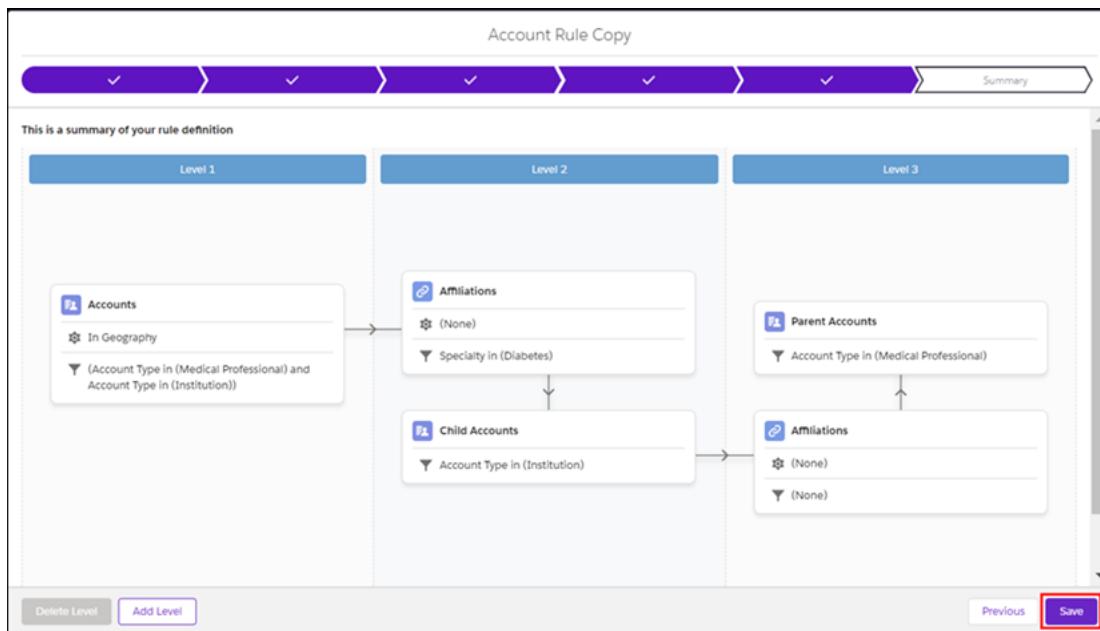
- Enter details of groups, conditions, or levels, if applicable, then click **Next**.

Account Rule Copy

The screenshot shows the 'Account Rule Copy' interface. At the top, there's a navigation bar with steps: 'Level 1' (highlighted in yellow), 'Level 2', 'Level 3', and 'Summary'. Below the navigation is a section titled 'Accounts' with a scope dropdown set to 'In Geography'. There are two filter rows under 'Filters': one for 'Account' type with 'Attribute' 'Account Type', 'Operator' 'in', and 'Value' 'Medical Professional'; and another for 'Account' type with 'Attribute' 'Account Type', 'Operator' 'in', and 'Value' 'Institution'. A red box highlights the 'Next' button at the bottom right.

Previous Next Save

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.

Account Alignment Rules						
Action	Account Rule Name	Account Rule Integration Id	Description	Sales Force Name	Sales Force Integration Id	
1 Edit	Alignment Rule A	PUK04JZER2EKJPA0A61	Diabetes Sales	Diabetes Sales	10000000087424	
2 Add	SF Rule	MOJ124V2F6YKDU3CP	Diabetes Sales	Diabetes Sales	10000000087424	
3 Add	SF24 Acct Rule	NK6FPN782Q5BSVXLMH	Diabetes Sales	Diabetes Sales	10000000087424	

3 Records

View All

Account
Alignment
Rules

3

...

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**.

Scenario Details									
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time		
Simulated	User	US	10/5/2022		10/5/2022, 12:26:35 PM	10/5/2022, 12:27:17 PM			
Details									
Scenario Name	Diabetes Sales								
Effective Date	10/5/2022								
Description									
Scenario Status	Simulated								
Error Message									
<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Simulate"/> <input type="button" value="Commit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/> <input type="button" value="Map"/> <input type="button" value="Adjudication"/> <input type="button" value="Bulk Import"/>									

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	Review Period	Review Dates	Allowed Action	Auto-Action for Manager
Territory	10 days	10/5/2022-10/14/2022	Select an Option	
District	10 days	10/5/2022-10/24/2022	Select an Option	Select an Option

- **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**.

The screenshot shows the 'Add Adjudication' process in a software application. The current step is 'Guard Rails'. The interface includes a header with scenario details: Scenario Status (Simulated), Scenario Type (User), Region Name (US), Effective Date (10/5/2022), End Date, Processing Start Time (10/5/2022, 12:26:35 PM), Processing End Time (10/5/2022, 12:27:17 PM), and Sync End Time. Below the header is a navigation bar with arrows pointing left and right, and tabs for 'Guard Rails', 'Select Participants', 'Select Additional Regions', and 'Summary'. The main area is titled 'Enter guard rails and warning limits'. It contains two sections: 'Hierarchy Level' and 'Non-action Warning #1'. The 'Hierarchy Level' section has two rows: one for 'Territory' with 'Max Account Change' set to 10 and 'Max Geography Change' set to 5; and another for 'District' with 'Max Account Change' set to 10 and 'Max Geography Change' set to 5. The 'Non-action Warning #1' section also has two rows: one for 'Territory' with 'Enter days' and '(days prior to review period end)' fields; and another for 'District' with 'Enter days' and '(days prior to review period end)' fields. At the bottom right of the form are 'Previous' and 'Next' buttons.

5. Select Participants, then click **Next**.

**Diabetes Sales
Add Adjudication**

Scenario Status Simulated	Scenario Type User	Region Name US	Effective Date 10/5/2022	End Date	Processing Start Time 10/5/2022, 12:26:35 PM	Processing End Time 10/5/2022, 12:27:17 PM	Sync End Time
------------------------------	-----------------------	-------------------	-----------------------------	----------	-------------------------------------------------	-----------------------------------------------	---------------

Select participants

Sales Forces Territories

Sales Force Name	Sales Force Integration Id	Sales Force Type	Region Name	Effective Date	End Date
INSTITUTIONAL_SF	TFD09KCD0J0I84U0H5	Institutional	US	5/1/2022	
MSL	Y5ZDXHK2J0J0990THL	Retail	US	5/1/2022	
Neurology	PSTO4PZU30J0DAP4UQH	Institutional	US	5/1/2022	
Neurology Institutional	KBYWKLPS30J0CX0EMU1	Institutional	US	5/1/2022	
Neurology Primary Care	TFJ20KGM0J0D000CRU1	Retail	US	5/1/2022	
Orthopedics	K3HBV8030J0F588R2K	Institutional	US	5/1/2022	
Vaccine SF	GUH3PVEX30J0TERU1	Retail	US	5/1/2022	

7 of 7

Previous Next

6. Select Regions, then click **Next**.

**Diabetes Sales
Add Adjudication**

Scenario Status Simulated	Scenario Type User	Region Name US	Effective Date 10/5/2022	End Date	Processing Start Time 10/5/2022, 12:26:35 PM	Processing End Time 10/5/2022, 12:27:17 PM	Sync End Time
------------------------------	-----------------------	-------------------	-----------------------------	----------	-------------------------------------------------	-----------------------------------------------	---------------

Select additional regions

Region Name	Region Integration Id	Country	Effective Date	End Date
US	100020000000107	United States	1/5/2019	

1 of 1 (1 selected)

Previous 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

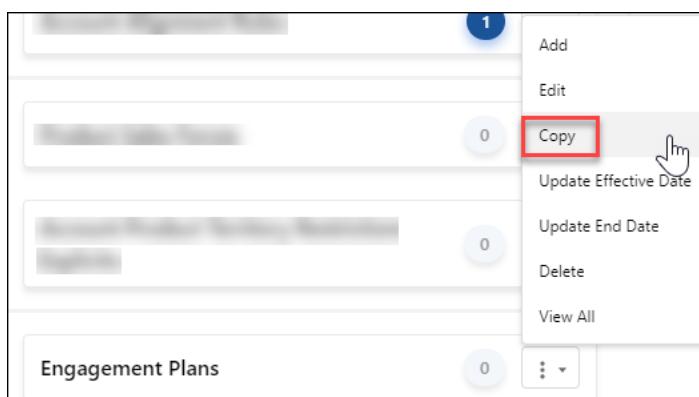
Use the engagement plan copy feature to quickly create a new engagement plan that is similar to an existing plan. You can copy engagement plans if the status of the scenario is *Pending* or *Simulated*.

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.

The screenshot shows a table titled "Scenarios" with columns: Scenario Name, Scenario Integr..., Scenario Status, Scenario Type, Effective D..., End Date, Process..., Process..., Region Name. There are 20 records listed. Scenario 14, "New Scenario", is highlighted with a red box around its row.

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**.

The screenshot shows the "Engagement Plans" tab selected in the navigation bar. The "Copy" button in the toolbar is highlighted with a red box.

- 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.

Engagement Plan Name	Engagement Plan Integration Id	Engagement Plan Description	Sales Force Name	Region Name	Effective Date	End Date
AB Eng Plan	C14QPZQQ4R554PWV7		Oncology Sales	US	9/13/2021	9/30/2021

- 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**.

Copy Engagement Plan

Enter engagement plan channels

Channel Name	Weight(%)
Face to Face	100

+ Add Channel

Delete Segment Add Segment Previous Next Save

7. Enter segment information, then click **Next**.

Copy Engagement Plan

Segment 1

* Segment Name	Segment Description
Gold	
* Rank	Account Rule Name
1	Rule A

Channel Name	Frequency Target
Face to Face	10

+ Add Channel

Delete Segment Add Segment Previous Next Save

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.

Copy Engagement Plan

Summary

Details		Channels (1)	Segments (3)								
Engagement Plan Name	Copy of AB Eng Plan	Engagement Plan Integration Id 3T7VR1FB4SB/YSRНАH									
Engagement Plan Description											
Sales Force Name	Oncology Sales										
Calculation Details <table border="1"> <tr> <td>Working Days</td> <td>12</td> <td>Target Call Rate</td> <td>10</td> </tr> <tr> <td>Minimum Call Rate</td> <td></td> <td>Maximum Call Rate</td> <td></td> </tr> </table>				Working Days	12	Target Call Rate	10	Minimum Call Rate		Maximum Call Rate	
Working Days	12	Target Call Rate	10								
Minimum Call Rate		Maximum Call Rate									
External Ids											
<input type="button" value="Delete Segment"/> <input type="button" value="Add Segment"/>		<input type="button" value="Previous"/> <input type="button" value="Save"/>									

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.

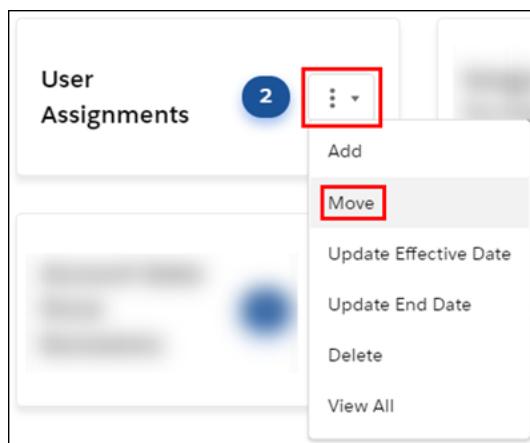
Scenarios

	Scenario Name	Scenario Integrat...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
11	Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...		
12	New Activity	J5TF9HV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13	New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	
14	New Scenario	LY8PJWVQ4BHQQFEL...	Pending	User	7/21/2021	10/31/2021			US
15	New Structure	SOZB6FA947V6FNNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	
16	New Vaccine SF Engage	4MVHAS7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	
17	New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

20 Records

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.

Action	Territory Name	Territory Integration Id	Territory Type	Sales Force Name	User Name	User Integrat
1 Add	New Jersey - Diabetes Sales	100690000013235	Territory	Diabetes Sales	Esme Battye	10000000620:
2 Add	New Jersey - Diabetes Sales	100690000013235	Territory	Diabetes Sales	Francene Persistent	10000000620:

- Select the territory or territories you want to move geographies, accounts, products, or users from, and then click **Next**.

Move User to Territory

From Territories > Users > To Territories > Selection

Select the territories you want to move users from:

	Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name
<input checked="" type="checkbox"/>	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Seif
<input type="checkbox"/>	Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales	Babs Steuth
<input type="checkbox"/>	Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Alisun Oloh
<input type="checkbox"/>	Delaware - Oncology Sales	100690000013130	Territory	Oncology Sales	Edward Earl
<input type="checkbox"/>	Maine - Diabetes Sales	100690000013205	Territory	Diabetes Sales	Tarah Kenel

10+ Records

[Cancel](#) [Next](#)

5. Select the geographies, accounts, products, or users you want to move, and then click **Next**.

Move User to Territory

From Territories > **Users** > To Territories > Selection

Select the users you want to move:

	User Name	User Integration Id	User Type	Effective Date	End Date	Territory Name	Assignment Type
<input checked="" type="checkbox"/>	Kirby Seif	10000000620025	Field Sales	1/1/2020		Connecticut - Diabetes Sales	Primary

1 Records

[Previous](#) [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.

Move User to Territory

To Territories Selection

Select the territories you want to move users to:

Existing **New**

Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name
<input type="checkbox"/> Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Seif
<input type="checkbox"/> Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales	Babs Steutly
<input checked="" type="checkbox"/> Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Alisun Olohar

10+ Records

[Previous](#) [Next](#)

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.

Move User to Territory

To Territories Selection

By checking the appropriate box, choose which user is moved to which territory:

To Territories

Users	<input checked="" type="checkbox"/> Delaware - Diabetes Sales
Kirby Seif	<input checked="" type="checkbox"/>

[Previous](#) [Save](#)

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.

Action	Territory Name	Territory Integration Id	Territory Type	Sales Force Name	User Name
1 Add	New Jersey - Diabetes Sales	100690000013235	Territory	Diabetes Sales	Ervine Battye
2 Add	New Jersey - Diabetes Sales	100690000013235	Territory	Diabetes Sales	Francene Penseit
3 Update End Date to Prior Day	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Self
4 Add	Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Kirby Self

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**

Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
Territories										
Add Edit Update Effective Date										
Territory Hierarchies										
Add Edit Move Update Effective Date										
0 of 0										
0 of 0										

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**.

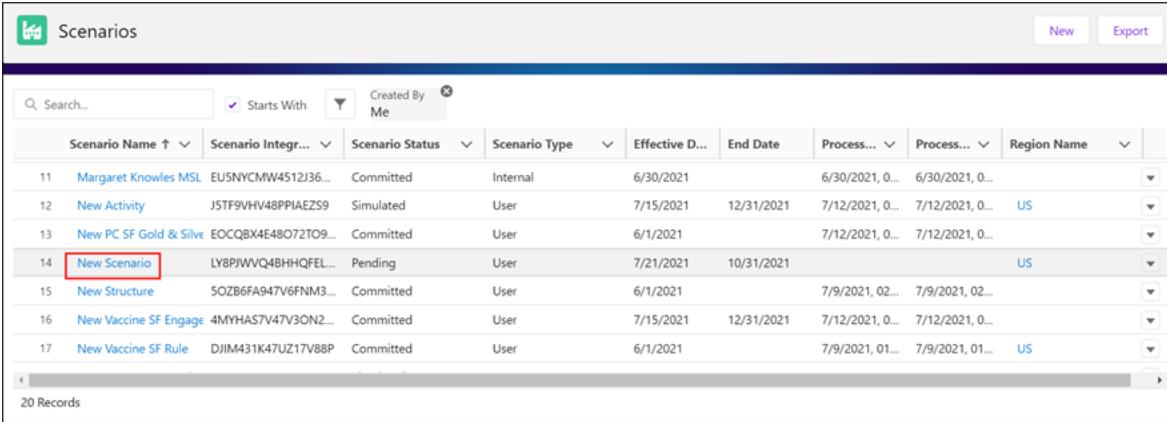
- The **To Parent Territory** step displays parent territories. Select the parent territory that you want to move the child territory to, then click **Next**.
- In the **Selection** step, click the box to select which child territory moves to which parent territory, then click **Save**.

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.

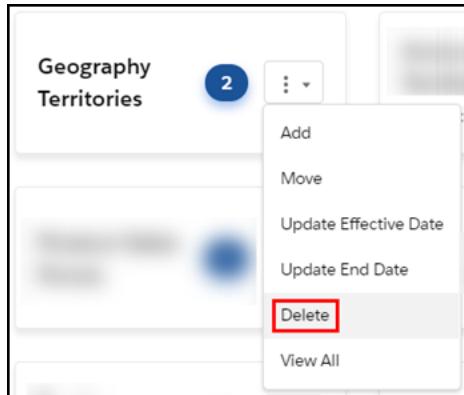
To delete a transaction or rule from a scenario

- Click **Scenarios** from the primary navigation bar.
- From the Scenarios screen, select the scenario that contains the transaction or rule you want to delete.



Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
11 Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...	
12 New Activity	J5TF9VHV48PPIAEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13 New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	
14 New Scenario	LY8PJWVQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US
15 New Structure	S0ZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	
16 New Vaccine SF Engage	4MYHASTV47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

- 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.

Action	Geography Name	Geography Integration Id	Geography Type	Territory Name	Territory Integration Id	Territory Type
1 Add	POST-01000	9600500000029797	Postal Code	Delaware - Diabetes Sal	100690000013295	Territory
2 Add	POST-01004	9600500000029805	Postal Code	Connecticut - Diabetes	100690000010596	Territory

2 Records

[View All](#)

- Select the territories (or users, sales forces, engagement plans, etc.) from which you want to delete, then click **Next**.

Delete Geography from Territory

Territories/Geographies		Selections																																
Select the territories/geographies you want to delete from:																																		
Territories	Geographies																																	
<div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> Q Search... <input checked="" type="checkbox"/> Starts With </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th style="width: 15%;">Territory Name ↑</th> <th style="width: 15%;">Territory Integration Id</th> <th style="width: 15%;">Territory Type</th> <th style="width: 15%;">Sales Force Name</th> <th>User Name</th> </tr> </thead> <tbody> <tr><td>Connecticut - Diabetes Sales</td><td>100690000010596</td><td>Territory</td><td>Diabetes Sales</td><td>Kirby Seif</td></tr> <tr><td>Connecticut - Oncology Sales</td><td>100690000013175</td><td>Territory</td><td>Oncology Sales</td><td>Babs Steutly</td></tr> <tr><td>Delaware - Diabetes Sales</td><td>100690000013295</td><td>Territory</td><td>Diabetes Sales</td><td>Alisun Olohan</td></tr> <tr><td>Delaware - Oncology Sales</td><td>100690000013130</td><td>Territory</td><td>Oncology Sales</td><td>Edward Earry</td></tr> <tr><td>Maine - Diabetes Sales</td><td>100690000013205</td><td>Territory</td><td>Diabetes Sales</td><td>Tarah Kenelin</td></tr> </tbody> </table>					Territory Name ↑	Territory Integration Id	Territory Type	Sales Force Name	User Name	Connecticut - Diabetes Sales	100690000010596	Territory	Diabetes Sales	Kirby Seif	Connecticut - Oncology Sales	100690000013175	Territory	Oncology Sales	Babs Steutly	Delaware - Diabetes Sales	100690000013295	Territory	Diabetes Sales	Alisun Olohan	Delaware - Oncology Sales	100690000013130	Territory	Oncology Sales	Edward Earry	Maine - Diabetes Sales	100690000013205	Territory	Diabetes Sales	Tarah Kenelin
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Cancel Next																																		

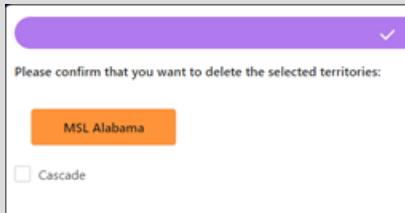
5. Select the geographies, accounts, products, engagement plans, etc. you want to delete, or the territories or sales forces, etc. from which you want to delete the selected territories, sales forces, rules, etc.

Delete Geography from Territory

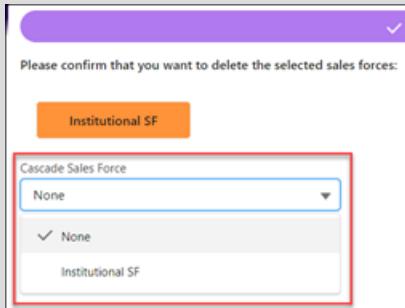
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Geography Name	Geography Integration Id	Geography Type	Effective Date	End Date	Territory N																																			
POST-19700	9600500000083379	Postal Code	1/1/2020		Delaware																																			
POST-19701	9600500000083381	Postal Code	1/1/2020		Delaware																																			
POST-19702	9600500000083383	Postal Code	1/1/2020		Delaware																																			
POST-19703	9600500000083385	Postal Code	1/1/2020		Delaware																																			
POST-19704	9600500000083387	Postal Code	1/1/2020		Delaware																																			
Previous Save																																								

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.

Scenario Name	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name
11 Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021		6/30/2021, 0...	6/30/2021, 0...	
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US
13 New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	
14 New Scenario	LY8PJWVQ4BHIIQFEL...	Pending	User	7/21/2021	10/31/2021			US
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	
16 New Vaccine SF Engage	4MYHAS7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US

3. Click **Simulate**.

Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time
Pending	User	US	7/1/2021				

Details

Scenario Name Account XYZ Rule	Scenario Integration Id B9WPLO6145CVBS7QS9
Effective Date 7/1/2021	End Date
Description	Region US
Scenario Status Pending	Scenario Type User

The **Scenario Status** changes to *Simulating*.

Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time
Simulating	User	US	7/1/2021		7/1/2021, 9:25:31 AM		

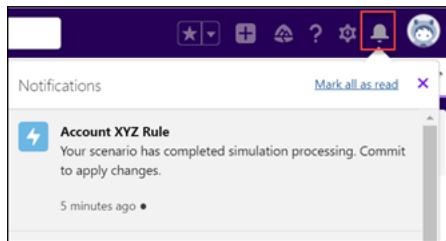
Note: The simulation process can take several minutes to complete. After the process completes, the **Scenario Status** changes to *Simulated* and you receive a notification that your scenario has completed simulation processing.

Scenario Status	User	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time
Simulated		US	7/1/2021		7/1/2021, 9:25:31 AM	7/1/2021, 9:29:18 AM	

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.

- Click **Notifications**  and select the message to go to the **Details** tab where you can verify the status of the scenario.



Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
Scenario Name Account XYZ Rule						Scenario Integration Id B9WPLO6145CVBS7QS9				
Effective Date 7/1/2021						End Date				
Description						Region US				
Scenario Status Simulated						Scenario Type User				
Error Message						Adjudication				

- Click the **Results** tab to view details of the simulation.

Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors																
Scenario Summary																										
Account Type																										
Total																										
<table border="1"> <thead> <tr> <th>Account Type</th> <th>Territory Name</th> <th>Territory Integr...</th> <th>Accounts Gained</th> <th>Accounts Lost</th> <th>Geographies Ga...</th> <th>Geographies Lost</th> <th>Accoun</th> </tr> </thead> <tbody> <tr> <td>1 Total</td> <td>Connecticut - Diabetes S</td> <td>100690000010596</td> <td>1</td> <td>0</td> <td>0</td> <td>0</td> <td>1</td> </tr> </tbody> </table>											Account Type	Territory Name	Territory Integr...	Accounts Gained	Accounts Lost	Geographies Ga...	Geographies Lost	Accoun	1 Total	Connecticut - Diabetes S	100690000010596	1	0	0	0	1
Account Type	Territory Name	Territory Integr...	Accounts Gained	Accounts Lost	Geographies Ga...	Geographies Lost	Accoun																			
1 Total	Connecticut - Diabetes S	100690000010596	1	0	0	0	1																			
1 Records																										

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.

Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results						
Scenario Summary															
Alignment Impact Analysis															
Engagement Plan Impact Analysis															
Additional Reports															
Scenario Summary															
<table border="1"> <thead> <tr> <th>Entity Name ↑</th> <th>Action</th> <th>Record Count</th> </tr> </thead> <tbody> <tr> <td>1 Scenario Territory Hierarchy</td> <td>Edit</td> <td>1</td> </tr> </tbody> </table>										Entity Name ↑	Action	Record Count	1 Scenario Territory Hierarchy	Edit	1
Entity Name ↑	Action	Record Count													
1 Scenario Territory Hierarchy	Edit	1													
1 of 1															

- Select the **Alignment Impact Analysis** tab to view details of the accounts gained, lost, or total accounts.

Account Type	Territory Name	Territory Unique Integration Id	Accounts Gained	Accounts Lost	Geographies Gained	Geographies Total	Sales Force
1 Total	Vaccine Wayne County...	009VORLH3PSIYF8R4I	0	18	0	6	Vaccine S
2 Total	Vaccine Martin County...	00B2NFN43PSIIPSB4GA	0	168	0	12	Vaccine S
3 Total	Vaccine Washington C...	00N917233PSIW6HQCK	0	6	0	14	Vaccine S
4 Total	Vaccine Nelson Count...	0148P1UR3PSIYMEJJI	0	27	0	9	Vaccine S
5 Total	Vaccine Platte County ...	015TSYUJ3PSIUASBFM	0	127	0	14	Vaccine S
6 Total	Vaccine Saline County ...	01BV8ITA3PSIR1EPIN	0	64	0	14	Vaccine S

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.

Account Name ↑	Account Integration Id	Account Type	Account Specialty
1 ADVANCED OBSTETRICS AND GYNECOLOGY, LLC		Practice	Obstetrics/gynecology
2 ALL WOMENS HEALTHCARE		Practice	Obstetrics/gynecology
3 JODY A DARWICK		Medical Professional	Nurse practitioner
4 PREMIERE OBGYN HEALTHCARE		Practice	Obstetrics/gynecology
5 SOMERSET OBGYN ASSOCIATES		Practice	Obstetrics/gynecology
6 ZUFALL HEALTH CENTER, INC		Practice	Primary Care

6 Records

[View All](#)

- Select the **Engagement Plan Impact Analysis** tab to view details of the engagement plan associated with the scenario, if any.

The screenshot shows the 'Engagement Plan Impact Analysis' section of the application. At the top, there are tabs for 'Details', 'Accounts', 'Geographies', 'Products', 'Rules', 'Engagement Plans', 'Sales Forces', 'Territories', 'User Assignments', 'Results', and 'Errors'. The 'Results' tab is selected. Below the tabs, there are links for 'Scenario Summary', 'Alignment Impact Analysis', 'Engagement Plan Impact Analysis' (which is underlined in blue), and 'Additional Reports'. On the right side of the header, there are buttons for 'Clear Filters' and other navigation options. The main content area is titled 'Engagement Plan Impact Analysis' and contains four filter fields: 'Account Type' (is any value), 'Channel' (is any value), 'Territory Name' (is any value), and 'Segment Name' (is any value). Below the filters, there is a large, empty rectangular box labeled 'Engagement Plan Impact Analysis'.

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.

The screenshot shows the 'Scenario Details' page for 'Aaron Newcomb Sales'. At the top, there is a 'New' button, followed by 'Edit', 'Simulate', 'Commit', 'Copy', and 'Delete' buttons. Below the buttons, there is a table with the following columns: 'Scenario Status' (highlighted with a red box), 'Scenario Type' (User), 'Region Name', 'Effective Date' (12/9/2020), 'End Date', 'Processing Start Time' (12/13/2020, 1:10:02 PM), 'Processing End Time' (12/13/2020, 1:11:50 PM), and 'Sync End Time'.

1. Click **Notifications** and select the error message to go to the **Details** tab where you can view a description of the error.

The screenshot shows the 'Notifications' dropdown menu. It has a 'Mark all as read' link and a close button. There is one notification entry: 'Aaron Newcomb Sales' with the message 'Your scenario encountered errors during processing.' and a timestamp '4 minutes ago'. The entire notification card is highlighted with a red box.

Details	Accounts	Geographies	Products	Rules	Sales Forces	Territories	User Assignments	Results	Errors
Scenario Name	Aaron Newcomb Sales						Scenario Integration Id	ZMEBC2AK2G5ZJ2YF8P	
Effective Date	12/9/2020						End Date		
Description							Region		
Scenario Status	Error						Scenario Type	User	
Error Message	Scenario output data is invalid. Check Scenario Errors for more details on records that failed.								

- Click the **Errors** tab to view the details of what needs to be fixed.

Details	Accounts	Geographies	Products	Rules	Sales Forces	Territories	User Assignments	Results	Errors
Errors									
1 Parent record not active over the entire interval	Account Product Explicit Restriction	OG6R3QOM280EFSR063	Parent record is not active over the entire i...						
2 Parent record not active over the entire interval	Account Product Explicit Restriction	PQ84O4EO280EFSQKQH	Parent record is not active over the entire i...						
3 Parent record not active over the entire interval	Account Product Explicit Restriction	XI620KPU280EFSR062	Parent record is not active over the entire i...						
3 Records									
View All									

- 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

- Click **Scenarios** from the primary navigation bar.
- From the Scenarios screen, select the scenario you want to commit.

Scenarios											New	Export	
<input type="text" value="Search..."/>		<input checked="" type="checkbox"/> Starts With	<input type="button" value="Created By Me"/>										
Scenario Name ↑	Scenario Integr...	Scenario Status	Scenario Type	Effective D...	End Date	Process...	Process...	Region Name					
11 Margaret Knowles MSL	EUSNYCMW4512J36...	Committed	Internal	6/30/2021	6/30/2021, 0...	6/30/2021, 0...	6/30/2021, 0...	US					
12 New Activity	J5TF9VHV48PP1AEZS9	Simulated	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US					
13 New PC SF Gold & Silve	EOCQBX4E48O72TO9...	Committed	User	6/1/2021		7/12/2021, 0...	7/12/2021, 0...	US					
14 New Scenario	LY8PJWWQ4BHHQFEL...	Pending	User	7/21/2021	10/31/2021			US					
15 New Structure	SOZB6FA947V6FNM3...	Committed	User	6/1/2021		7/9/2021, 02...	7/9/2021, 02...	US					
16 New Vaccine SF Engage	4MYHAST7V47V3ON2...	Committed	User	7/15/2021	12/31/2021	7/12/2021, 0...	7/12/2021, 0...	US					
17 New Vaccine SF Rule	DJIM431K47UZ17V88P	Committed	User	6/1/2021		7/9/2021, 01...	7/9/2021, 01...	US					
20 Records													

3. Click Commit.

Scenario Account XYZ Rule								New	Edit	Simulate	Commit	Copy	Delete	Map	Adjudication
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time								
Simulated	User	US	7/1/2021		7/1/2021, 9:25:31 AM	7/1/2021, 9:29:18 AM									
Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors					
Scenario Name Account XYZ Rule					Scenario Integration Id B9WPLO6145CVB57QS9										
Effective Date 7/1/2021					End Date										
Description					Region US										
Scenario Status Simulated					Scenario Type User										
Error Message					Adjudication										

The **Scenario Status** changes to *Committing*.

Scenario Account XYZ Rule								New	Map
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time		
Committing	User	US	7/1/2021						

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.

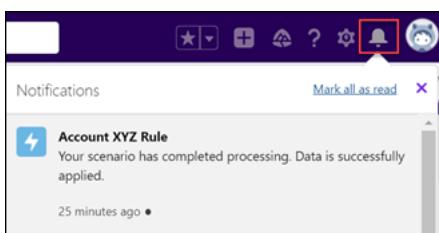
Scenario Account XYZ Rule								New	Map
Scenario Status	Scenario Type	Region Name	Effective Date	End Date	Processing Start Time	Processing End Time	Sync End Time		
Syncing	User	US	7/1/2021		7/1/2021, 11:14:39 AM	7/1/2021, 11:17:08 AM			

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.

Scenario XYZ Rule							
Scenario Stat...	Scenario Ty...	Region Na...	Effective Da...	End Da...	Processing Start Time	Processing End Time	Sync End Time
Committed	User	US	7/1/2021		7/1/2021, 11:14:39 A...	7/1/2021, 11:17:08 A...	7/1/2021, 11:17:46 A...

If the **Scenario Status** changes to *Error*, see [Fix Scenario Errors](#).

- Click **Notifications**  and select the message to go to the **Details** tab, where you can verify the status of the scenario.



Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors
Scenario Name Account XYZ Rule						Scenario Integration Id B9WPLO6145CVBS7Q59				
Effective Date 7/1/2021						End Date				
Description						Region US				
Scenario Status Committed						Scenario Type User				

- Click the **Results** tab to view details of the scenario.

Details	Accounts	Geographies	Products	Rules	Engagement Plans	Sales Forces	Territories	User Assignments	Results	Errors																
Scenario Summary																										
Account Type																										
Total																										
<table border="1"> <thead> <tr> <th>Account Type</th> <th>Territory Name</th> <th>Territory Integr...</th> <th>Accounts Gained</th> <th>Accounts Lost</th> <th>Geographies Ga...</th> <th>Geographies Lost</th> <th>Accoun</th> </tr> </thead> <tbody> <tr> <td>1 Total</td> <td>Connecticut - Diabetes S</td> <td>100690000010596</td> <td>1</td> <td>0</td> <td>0</td> <td>0</td> <td>1</td> </tr> </tbody> </table>											Account Type	Territory Name	Territory Integr...	Accounts Gained	Accounts Lost	Geographies Ga...	Geographies Lost	Accoun	1 Total	Connecticut - Diabetes S	100690000010596	1	0	0	0	1
Account Type	Territory Name	Territory Integr...	Accounts Gained	Accounts Lost	Geographies Ga...	Geographies Lost	Accoun																			
1 Total	Connecticut - Diabetes S	100690000010596	1	0	0	0	1																			
1 Records																										

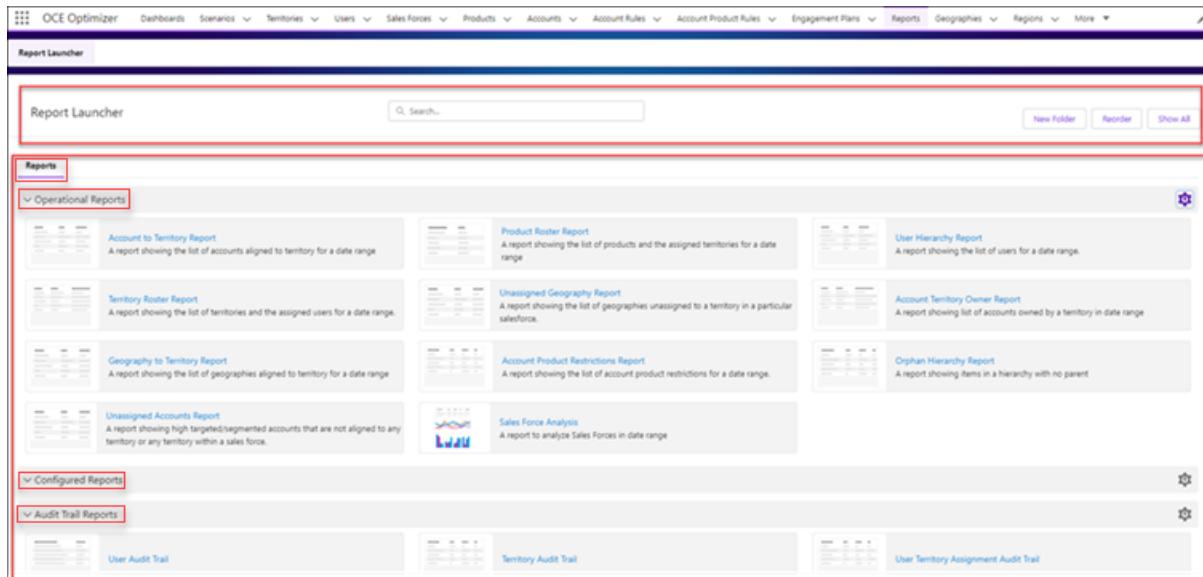
Reports

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.

The screenshot shows the 'Reports' tab selected in the navigation bar. Under the 'Operational Reports' section, there are ten report cards arranged in two rows of five. Each card includes a preview icon, the report name, and a brief description.

Report Name	Description
Account to Territory Report	A report showing the list of accounts aligned to territory for a date range
Product Roster Report	A report showing the list of products and the assigned territories for a date range
User Hierarchy Report	A report showing the list of users for a date range
Territory Roster Report	A report showing the list of territories and the assigned users for a date range
Unassigned Geography Report	A report showing the list of geographies unassigned to a territory in a particular salesforce.
Account Territory Owner Report	A report showing list of accounts owned by a territory in date range
Geography to Territory Report	A report showing the list of geographies aligned to territory for a date range
Account Product Restrictions Report	A report showing the list of account product restrictions for a date range.
Orphan Hierarchy Report	A report showing items in a hierarchy with no parent
Unassigned Accounts Report	A report showing high targeted/segmented accounts that are not aligned to any territory or any territory within a sales force.
Sales Force Analysis	A report to analyze Sales Forces in date range

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**.

The screenshot shows the Report Launcher interface with a search bar at the top. Below it, there are sections for 'Reports' and 'Operational Reports'. Under 'Operational Reports', there are eight cards: Account to Territory Report, Product Roster Report, User Hierarchy Report, Territory Roster Report, Unsigned Geography Report, Account Territory Owner Report, Geography Territory Report, Account Product Restrictions Report, and Sales Force Analysis. Each card has a brief description. At the bottom, there's a section for 'Configured Reports'.

3. Click **More** to view all report filters.

The screenshot shows the configuration screen for the 'Account to Territory Report'. It includes fields for Report Date, Account Name, Source, Territory Name, Territory Cascade, Territory Type, Sales Force Name, and Region Name. A 'More + 4' button is highlighted with a red box. A detailed filter panel is open, showing dropdowns for Account Integration Id, Territory Integration Id, Sales Force Integration Id, and Region Integration Id, each set to 'any value'.

- **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.

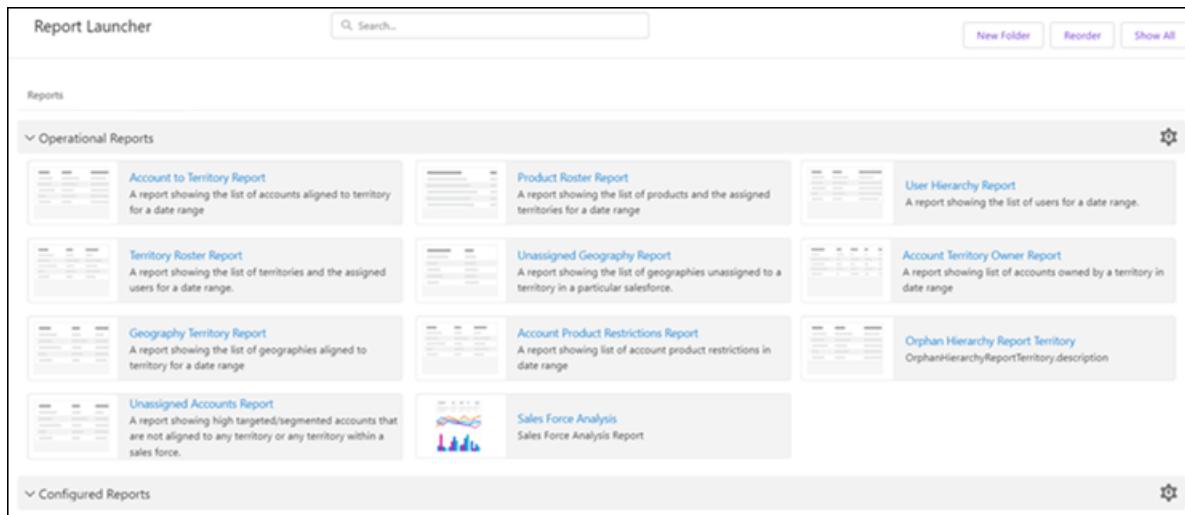
Account to Territory Report												
	Account Nr	Account In...	Account Ty...	Account Sp...	Source	Reason	Territory N...	Territory In...	Account Te...	Account Te...	Sales Forc...	Sales Forc...
1	20 Mile Urg...	WUSE0020...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Do...	2971JELF3...	2021-06-01		Vaccine SF	GLW3PV8X...
2	20 Mile Urg...	WUSE0020...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Je...	1CNUOSLO...	2021-06-01		Vaccine SF	GLW3PV8X...
3	1st Choice ...	WUSE0010...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Cl...	Z26NW69X...	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...	KHKAT0F7...	2021-06-01		Vaccine SF	GLW3PV8X...
7	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Ml...	LB032KAE...	2021-06-01		Vaccine SF	GLW3PV8X...
8	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine Da...	F7A07TKS...	2021-06-01		Vaccine SF	GLW3PV8X...
9	16th Street ...	WUSE0062...	Practice	Other speci...	Dynamic	Vaccine SF...	Vaccine St...	D116DRRR...	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...	04V3XMB...	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.

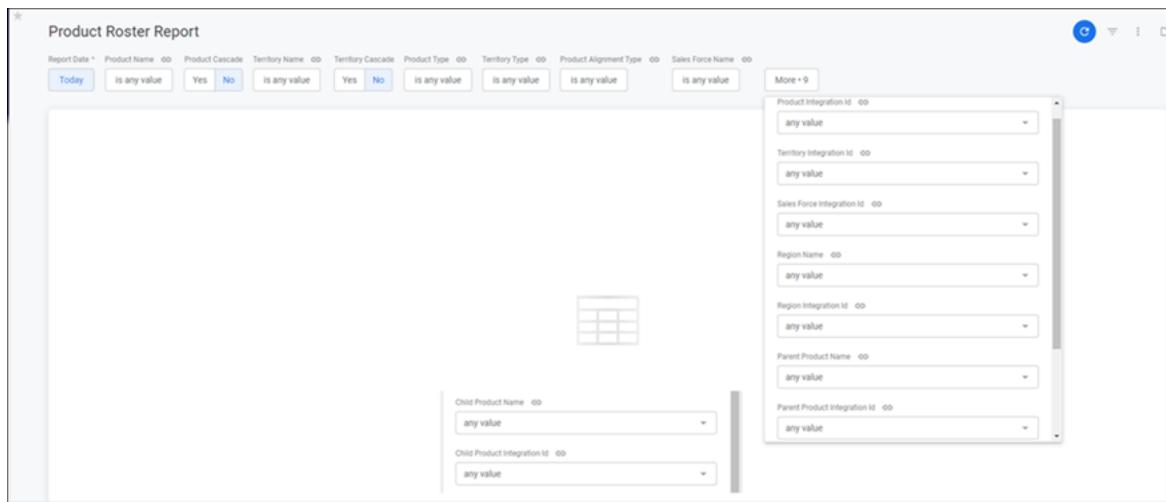
To view the Product Roster report

1. Click **Reports** from the primary navigation bar.
2. From the **Reports** tab, in the **Operational Reports** section, click **Product Roster Report**.



The screenshot shows the Report Launcher interface. In the top left, it says "Report Launcher". There is a search bar with placeholder text "Search...". On the right side of the header are three buttons: "New Folder", "Reorder", and "Show All". Below the header, there are two sections: "Reports" and "Operational Reports". Under "Operational Reports", there is a grid of nine report cards. The "Product Roster Report" card is highlighted with a blue border. The other cards are: "Account to Territory Report", "User Hierarchy Report", "Territory Roster Report", "Unassigned Geography Report", "Account Territory Owner Report", "Geography Territory Report", "Account Product Restrictions Report", "Orphan Hierarchy Report Territory", and "Unassigned Accounts Report". At the bottom of the grid, there is a "More" button followed by a "Configured Reports" section. On the far right of the grid, there is a gear icon.

3. Click **More** to view all report filters.



The screenshot shows the "Product Roster Report" filter dialog. At the top, it says "Product Roster Report". Below that are several filter fields: "Report Date" (with "Today" selected), "Product Name" (dropdown menu), "Product Cascade" (checkbox), "Territory Name" (dropdown menu), "Territory Cascade" (checkbox), "Product Type" (dropdown menu), "Territory Type" (dropdown menu), "Product Alignment Type" (dropdown menu), "Sales Force Name" (dropdown menu), and "Sales Force" (dropdown menu). To the right of these fields is a "More" button followed by a large list of additional filter options. These include: "Product Integration Id" (dropdown menu), "Territory Integration Id" (dropdown menu), "Sales Force Integration Id" (dropdown menu), "Region Name" (dropdown menu), "Region Integration Id" (dropdown menu), "Parent Product Name" (dropdown menu), and "Parent Product Integration Id" (dropdown menu). There is also a small grid icon in the center of the dialog.

- **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.

Product Roster Report												
Report Date *	Product Name	Product Cascade	Territory Name	Territory Cascade	Product Type	Territory Type	Product Alignment Type					
Last 14 Days	is any value	Yes	No	is any value	Yes	No	is any value	is any value	is any value	is any value	is any value	is any value
Sales Force Name	is any value	More + 9										
Product N ^	Product I...	Product T...	Product E...	Product E...	Sales For...	Sales For...	Territory ...	Territory I...	Product A...	Product A...	Product A...	Source
1 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurolog...	7P3L0FG...	Neurolog...	CCMJF59...	Sales	2021-07-01	3999-12-31	
2 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurolog...	7P3L0FG...	Neurolog...	3FN2AU...	Ratings	2021-07-01	3999-12-31	
3 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurology	PSTOAPZ...	Neurolog...	WZVGQQ...	Detail	2021-06-01	3999-12-31	
4 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurolog...	7P3L0FG...	Neurolog...	AN5J1E0...	Sales	2021-07-01	3999-12-31	
5 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurolog...	7P3L0FG...	Neurolog...	7FWTB01...	Sales	2021-07-01	3999-12-31	
6 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurolog...	7P3L0FG...	Neurolog...	7FWTB01...	Detail	2021-07-01	3999-12-31	
7 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurolog...	7P3L0FG...	Neurolog...	XP61SK5...	Detail	2021-07-01	3999-12-31	
8 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurology	PSTOAPZ...	Neurolog...	XX72UM...	Detail	2021-06-01	3999-12-31	
9 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurolog...	PSTOAPZ...	Neurolog...	EZ7RHZY...	Detail	2021-06-01	3999-12-31	
10 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurolog...	7P3L0FG...	Neurolog...	7TNSHE8...	Ratings	2021-07-01	3999-12-31	
11 Babolofin	1000000...	Detail	2020-01-01	3999-12-31	Neurology	PSTOAPZ...	Neurolog...	56BCY4Z...	Detail	2021-06-01	3999-12-31	

[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**.

The screenshot shows the Report Launcher interface with a search bar at the top. Below it, there are sections for 'Operational Reports' and 'Configured Reports'. Under 'Operational Reports', there are eight items listed:

- Account to Territory Report**: A report showing the list of accounts aligned to territory for a date range.
- Territory Roster Report**: A report showing the list of territories and the assigned users for a date range.
- Geography Territory Report**: A report showing the list of geographies aligned to territory for a date range.
- Unsigned Accounts Report**: A report showing high targeted/segmented accounts that are not aligned to any territory or any territory within a sales force.
- Product Roster Report**: A report showing the list of products and the assigned territories for a date range.
- Unsigned Geography Report**: A report showing the list of geographies unassigned to a territory in a particular salesforce.
- Account Territory Owner Report**: A report showing list of accounts owned by a territory in date range.
- Sales Force Analysis**: Sales Force Analysis Report.

3. Click **More** to view all report filters.

The screenshot shows the configuration screen for the 'User Hierarchy Report'. At the top, there are several filter fields:

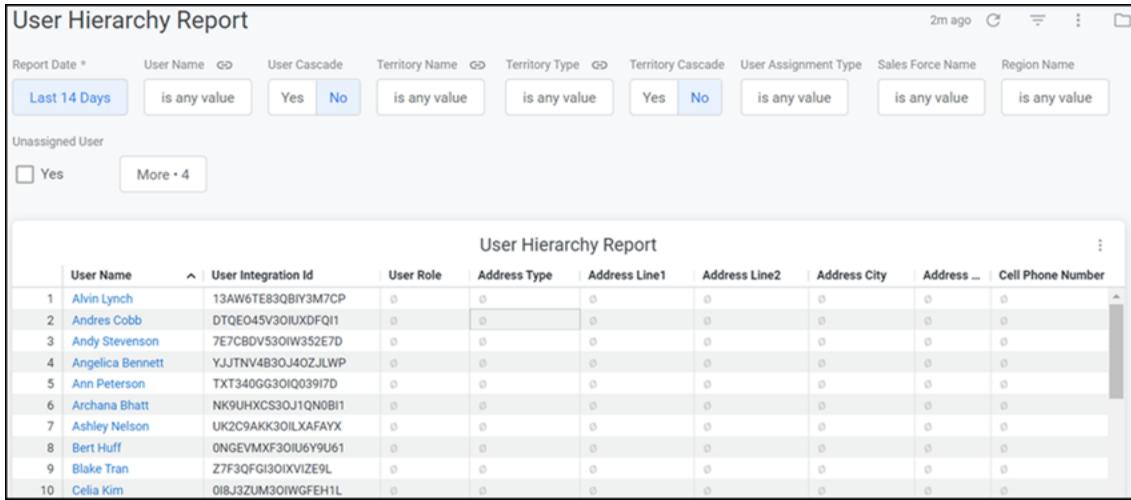
- Report Date**: Set to 'Today'.
- User Name**: An input field with dropdown arrows.
- User Cascade**: A dropdown menu with 'Yes' and 'No' options.
- Territory Name**: An input field with dropdown arrows.
- Territory Type**: An input field with dropdown arrows.
- Territory Cascade**: A dropdown menu with 'Yes' and 'No' options.
- User Assignment Type**: An input field with dropdown arrows.
- Sales Force Name**: An input field with dropdown arrows.
- Region Name**: An input field with dropdown arrows.
- Unassigned User**: A checkbox.
- More + 4**: A button to expand additional filter fields.

On the right side, there is a panel for 'User Integration ID' with a dropdown menu showing 'any value'. Below it are four more dropdown menus for 'Territory Integration ID', 'Sales Force Integration ID', and 'Region Integration ID', each also showing 'any value'.

- **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.



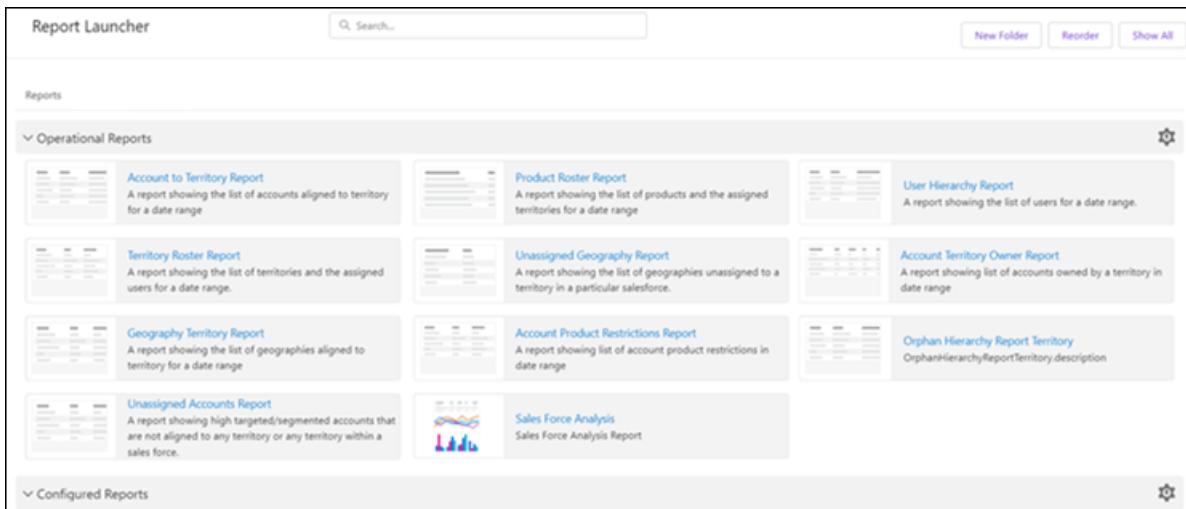
User Name	User Integration Id	User Role	Address Type	Address Line1	Address Line2	Address City	Address ...	Cell Phone Number
1 Alvin Lynch	13AW6TE83Q8IY3M7CP	○	○	○	○	○	○	○
2 Andres Cobb	DTQE045V30IUXDFQ11	○	○	○	○	○	○	○
3 Andy Stevenson	7E7CBDV530IW352E7D	○	○	○	○	○	○	○
4 Angelica Bennett	YJTNV4B30J40ZJLWP	○	○	○	○	○	○	○
5 Ann Peterson	TXT340GG30IQ03917D	○	○	○	○	○	○	○
6 Archana Bhatt	NK9UHIXCS30J1QN0B1	○	○	○	○	○	○	○
7 Ashley Nelson	UK2C9AKK30ILXAFAYX	○	○	○	○	○	○	○
8 Bert Huff	0NGEVMMXF30IU6Y9U61	○	○	○	○	○	○	○
9 Blake Tran	Z7F3QFGI30IXV1ZE9L	○	○	○	○	○	○	○
10 Celia Kim	0I8J3ZUM30IWGFEH1L	○	○	○	○	○	○	○

View the Territory Roster Report

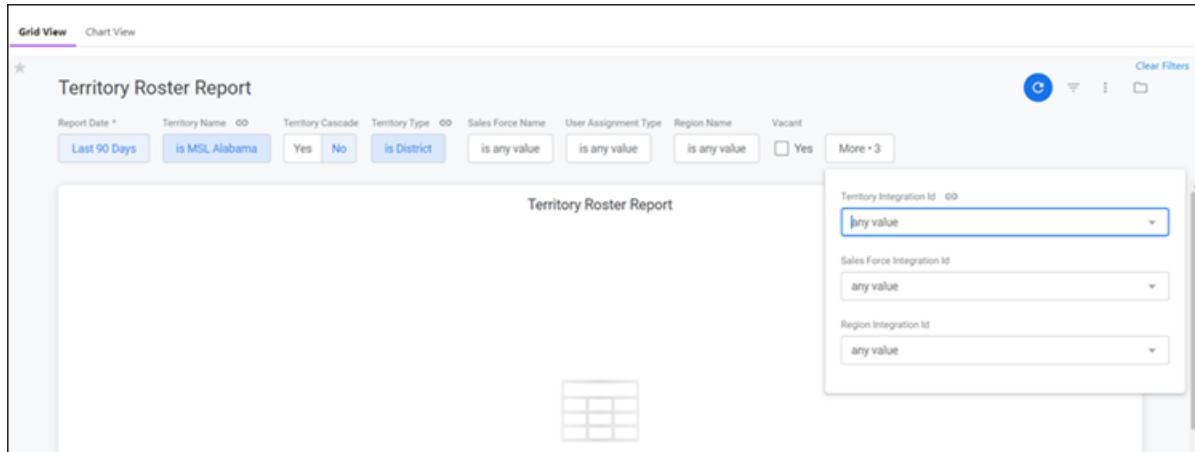
The Territory Roster report displays a list of territories that match selected criteria and includes the users assigned to the territories. You can analyze data for past, current, and future dates.

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**.



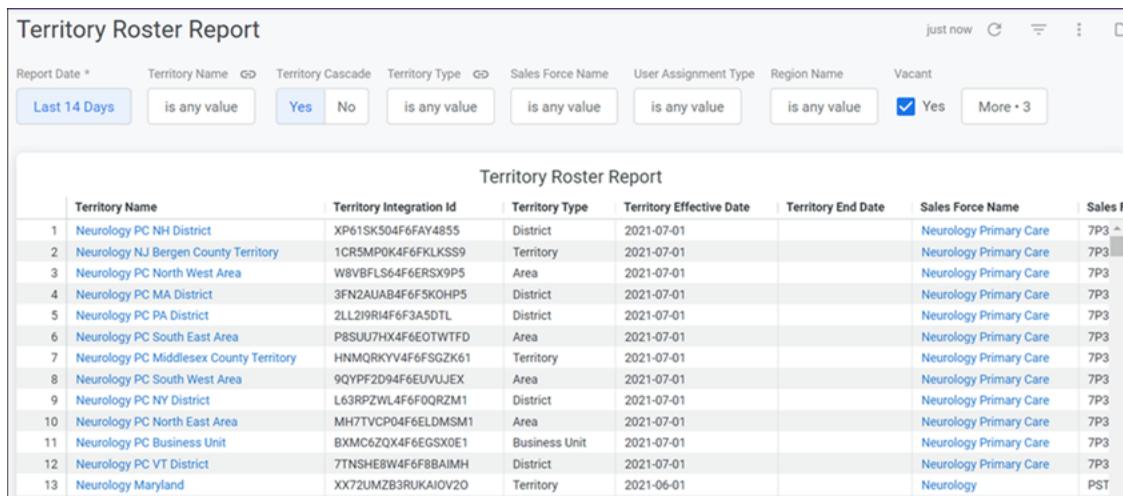
3. Click **More** to view all report filters.



- **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.



The screenshot shows the 'Territory Roster Report' interface. At the top, there are search filters for 'Report Date' (set to 'Last 14 Days'), 'Territory Name' (is any value), 'Territory Cascade' (Yes), 'Territory Type' (is any value), 'Sales Force Name' (is any value), 'User Assignment Type' (is any value), 'Region Name' (is any value), and 'Vacant' (Yes). Below the filters is a table titled 'Territory Roster Report' with 13 rows of data. The columns are: Territory Name, Territory Integration Id, Territory Type, Territory Effective Date, Territory End Date, Sales Force Name, and Sales F. The data includes various Neurology PC territories across different states and types (District, Territory, Area, Business Unit).

	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	WBVBFLS4F6ERSX9P5	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	2LL29RI4F6F3A5DTL	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	HNMQRKVVA4F6SGZK61	Territory	2021-07-01		Neurology Primary Care	7P3
8	Neurology PC South West Area	9QYPF2D94F6EUUVJEX	Area	2021-07-01		Neurology Primary Care	7P3
9	Neurology PC NY District	L63RPZWL4F6FOORZM1	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	XX72UMZB3RUKAI0V20	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**.

The screenshot shows the Report Launcher interface with a search bar and buttons for 'New Folder', 'Reorder', and 'Show All'. Under the 'Reports' section, there's a category 'Operational Reports' containing several report cards:

- Account to Territory Report**: A report showing the list of accounts aligned to territory for a date range.
- Territory Roster Report**: A report showing the list of territories and the assigned users for a date range.
- Product Roster Report**: A report showing the list of products and the assigned territories for a date range.
- User Hierarchy Report**: A report showing the list of users for a date range.
- Geography Territory Report**: A report showing the list of geographies aligned to territory for a date range.
- Account Product Restrictions Report**: A report showing list of account product restrictions in date range.
- Unsigned Accounts Report**: A report showing high targeted/segmented accounts that are not aligned to any territory or any territory within a sales force.
- Sales Force Analysis**: Sales Force Analysis Report.

Below this is a section for 'Configured Reports'.

3. Click **More** to view all report filters.

The screenshot shows the configuration screen for the 'Unassigned Geography Report'. At the top, there are tabs for 'Report Date', 'Geography Name', 'Geography Type', 'Cascade', 'Sales Force Name', and 'Region Name'. Below these are buttons for 'Today', 'is any value', 'is any value', 'Yes', 'No', 'is any value', 'is any value', and a 'More • 4' button. The main area is titled 'Unassigned Geography Report' and contains four dropdown filters:

- City**: any value
- State**: any value
- Geography Integration Id**: any value
- Sales Force Integration Id**: any value

- **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 *	Geography Name	Geography Type	Cascade	Sales Force Name	Region Name	
Year To Date	<input type="text" value="is any value"/>	<input type="text" value="is any value"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="text" value="is any value"/>	<input type="text" value="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	TFDI09CD30J84...
2	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Orthopedics	K3IKBV8030JF5...
3	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Neurology Prim...	7P3L0FGM30JD...
4	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Pain Medicine	QSERG0AA30JD...
5	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	MSL	Y6ZKSNK230J8...
6	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Neurology Instit...	K8YWJLFS30JD...
7	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Neurology	PSTOAPZU30JD...
8	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Womens Health ...	XQ2WMFNV30J...
9	POST-00000	130008295676	Postal Code	Unknown	ZZ	United States	US	Vaccine SF	GLW3PV8X30J7...
10	POST-00001	130003832896	Postal Code	Unknown	CA	United States	US	Institutional SF	TFDI09CD30J84...
11	POST-00001	130003832896	Postal Code	Unknown	CA	United States	US	Orthopedics	K3IKBV8030JF5...
12	POST-00001	130003832896	Postal Code	Unknown	CA	United States	US	Vaccine SF	GLW3PV8X30J7...
13	POST-00001	130003832896	Postal Code	Unknown	CA	United States	US	Pain Medicine	QSERG0AA30JD...

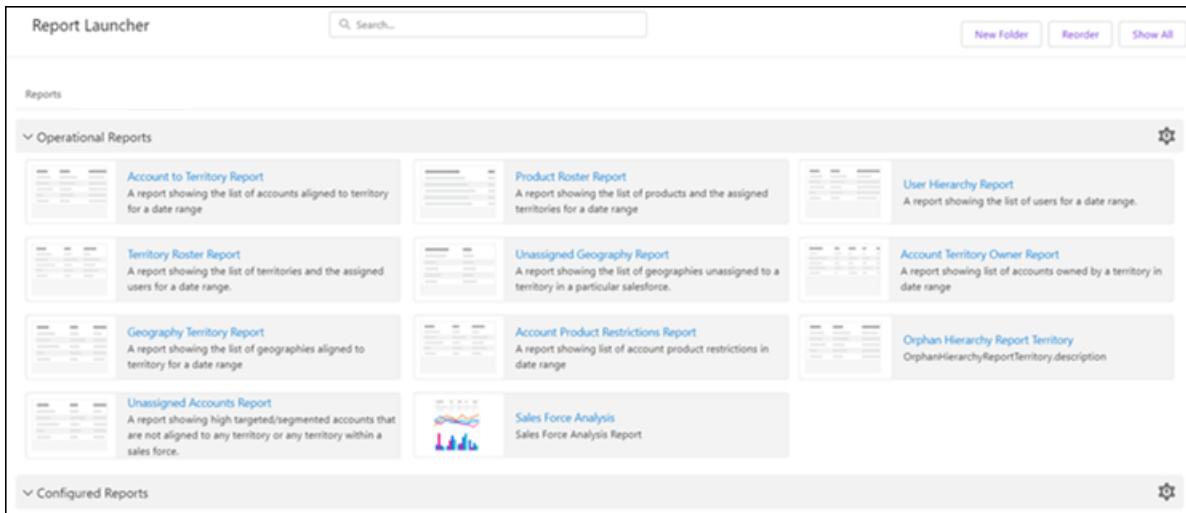
[View the Account Territory Owner Report](#)

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.

- From the **Reports** tab, in the **Operational Reports** section, click **Account Territory Owner Report**.



- 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 Territory Owner Report												
	Report Date *	Account Name	Territory Name									
	Last 14 Days	is any value	is any value	More + 2								
Account Territory Owner Report												
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...	TDRYVSC1...	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...	ZEGRRC46...	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...	3FCR1R40...	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		

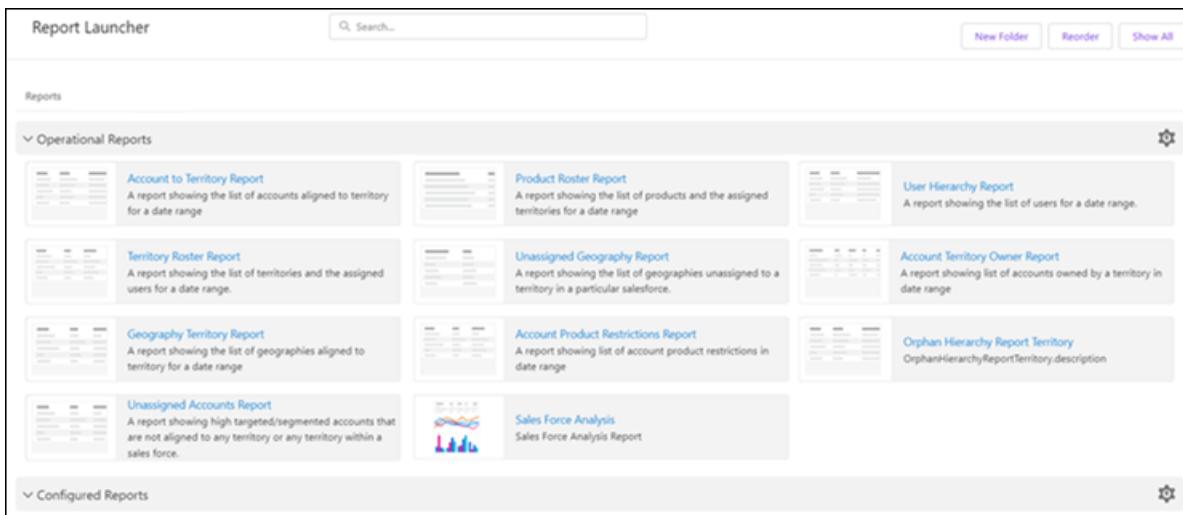
[View the Geography to Territory Report](#)

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.

- From the **Reports** tab, in the **Operational Reports** section, click **Geography to Territory Report**.



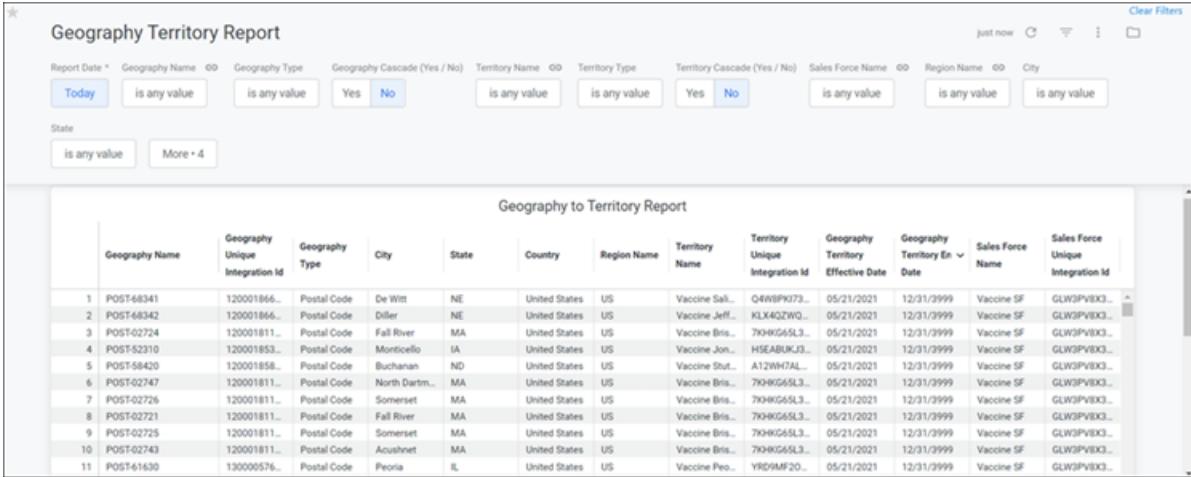
- Click **More** to view all report filters.

The screenshot shows the 'Geography Territory Report' filter interface. At the top, there are tabs for 'Report Date', 'Geography Name', 'Geography Type', 'Geography Cascade (Yes / No)', 'Territory Name', 'Territory Type', 'Territory Cascade (Yes / No)', 'Sales Force Name', 'Region Name', and 'City'. Below these are dropdown menus for 'State' and 'More + 4'. The main area contains four dropdown fields for 'Geography Integration Id', 'Territory Integration Id', 'Sales Force Integration Id', and 'Region Integration Id', each with a placeholder 'any value'. To the right, a preview window shows a sample report titled 'Geography to Territory Report'.

- 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.



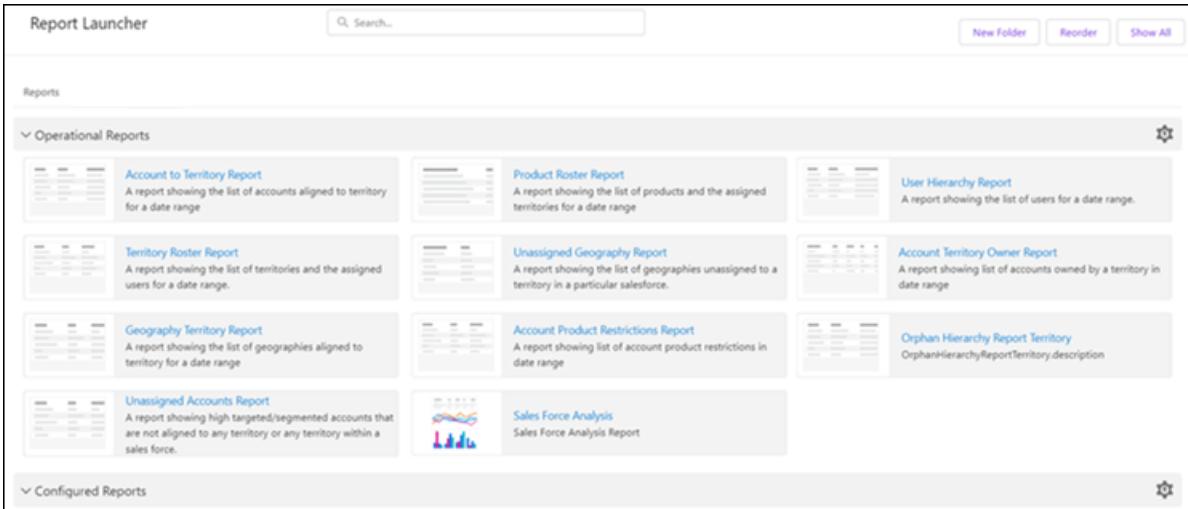
Geography to Territory Report													
	Geography Name	Geography Unique Integration Id	Geography Type	City	State	Country	Region Name	Territory Name	Territory Unique Integration Id	Geography Territory Effective Date	Geography Territory End Date	Sales Force Name	Sales Force Unique Integration Id
1	POST-68341	120001866..	Postal Code	De Witt	NE	United States	US	Vaccine Sale..	Q4WBPK73..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
2	POST-68342	120001866..	Postal Code	Diller	NE	United States	US	Vaccine Jeff..	KLX4QZWO..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
3	POST-02724	120001811..	Postal Code	Fall River	MA	United States	US	Vaccine Bris..	79K0G55L3..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
4	POST-52310	120001853..	Postal Code	Monticello	IA	United States	US	Vaccine Jon..	HSEABRUKJ3..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
5	POST-58420	120001858..	Postal Code	Buchanan	ND	United States	US	Vaccine Shut..	A12WHTAL..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
6	POST-02747	120001811..	Postal Code	North Dartm..	MA	United States	US	Vaccine Bris..	79K0G55L3..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
7	POST-02726	120001811..	Postal Code	Somerset	MA	United States	US	Vaccine Bris..	79K0G55L3..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
8	POST-02721	120001811..	Postal Code	Fall River	MA	United States	US	Vaccine Bris..	79K0G55L3..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
9	POST-02725	120001811..	Postal Code	Somerset	MA	United States	US	Vaccine Bris..	79K0G55L3..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
10	POST-02743	120001811..	Postal Code	Acushnet	MA	United States	US	Vaccine Bris..	79K0G55L3..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..
11	POST-61630	130000576..	Postal Code	Peoria	IL	United States	US	Vaccine Peo..	YRQ9MF20..	05/21/2021	12/31/9999	Vaccine SF	GLW3Pv8X3..

View the Account Product Restrictions Report

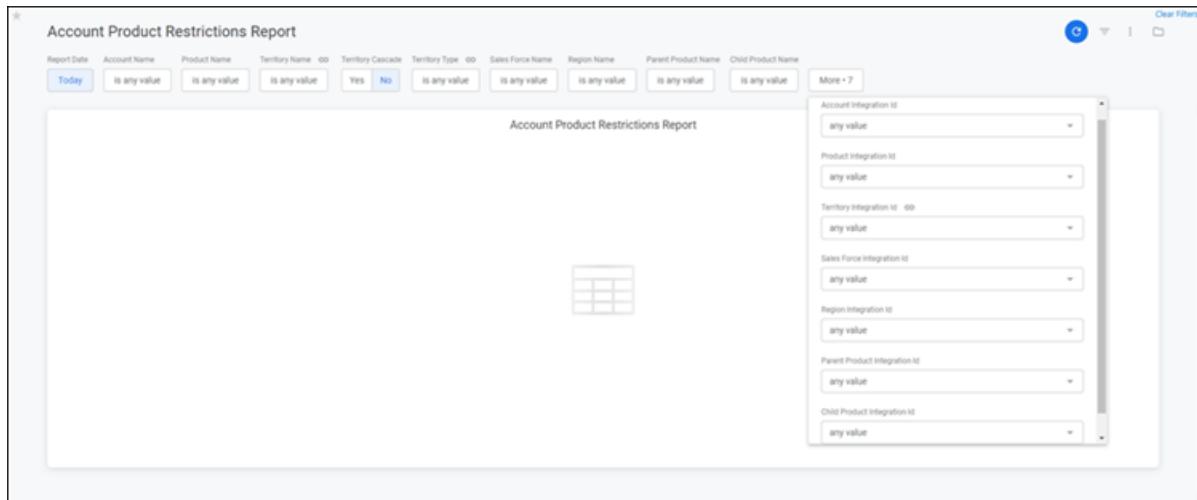
The Account Product Restrictions report displays the list of account product restrictions and account product territory restrictions.

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**.



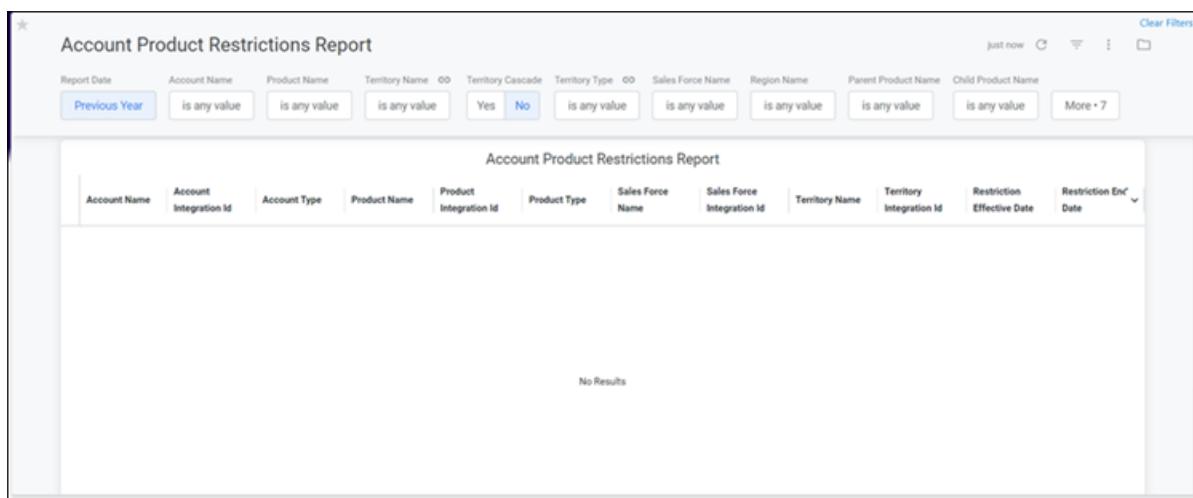
3. Click **More** to view all report filters.



- **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.



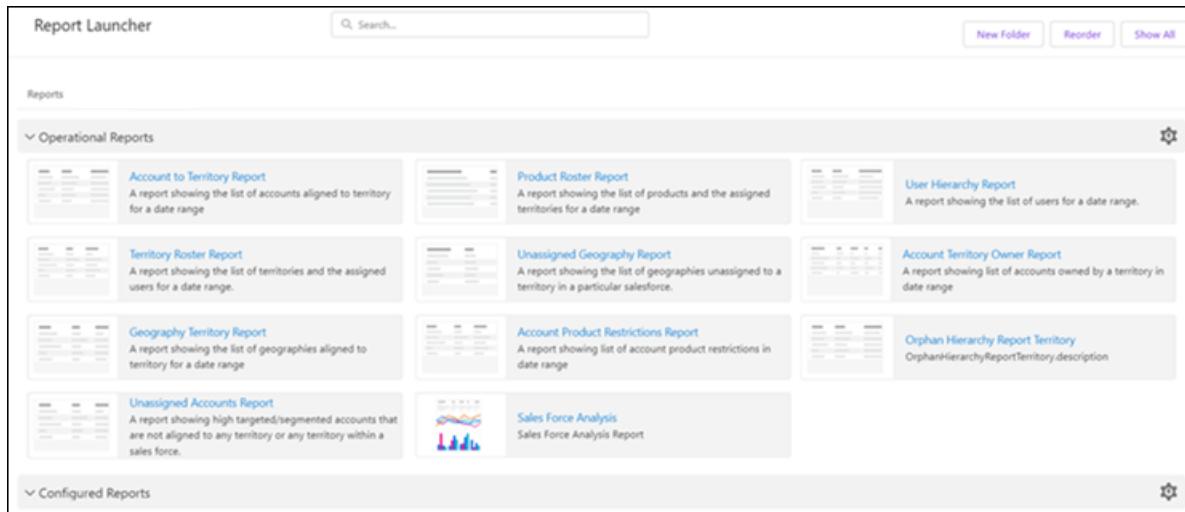
Account Name	Account Integration Id	Account Type	Product Name	Product Integration Id	Product Type	Sales Force Name	Sales Force Integration Id	Territory Name	Territory Integration Id	Restriction Effective Date	Restriction End Date
No Results											

[View the Orphan Hierarchy Report](#)

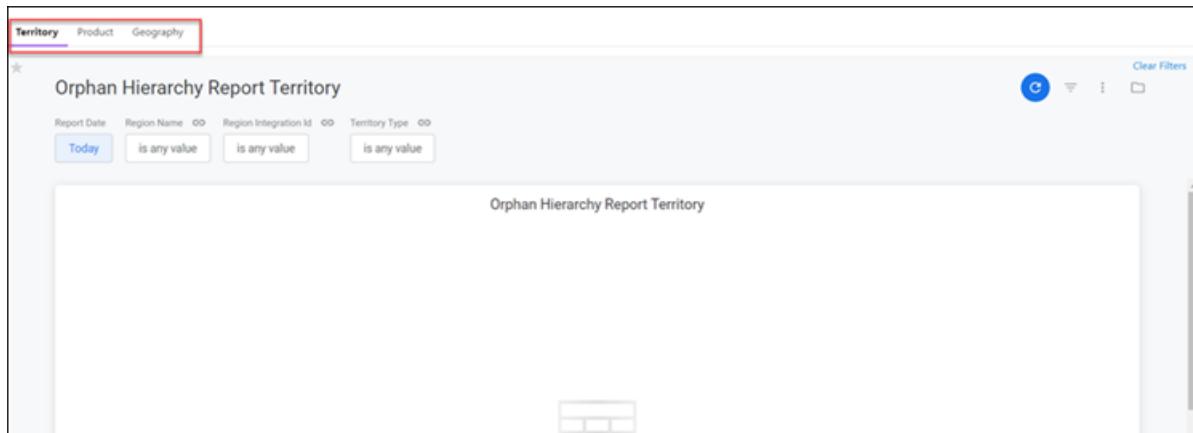
The Orphan Hierarchy report identifies any missing hierarchy records.

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**.



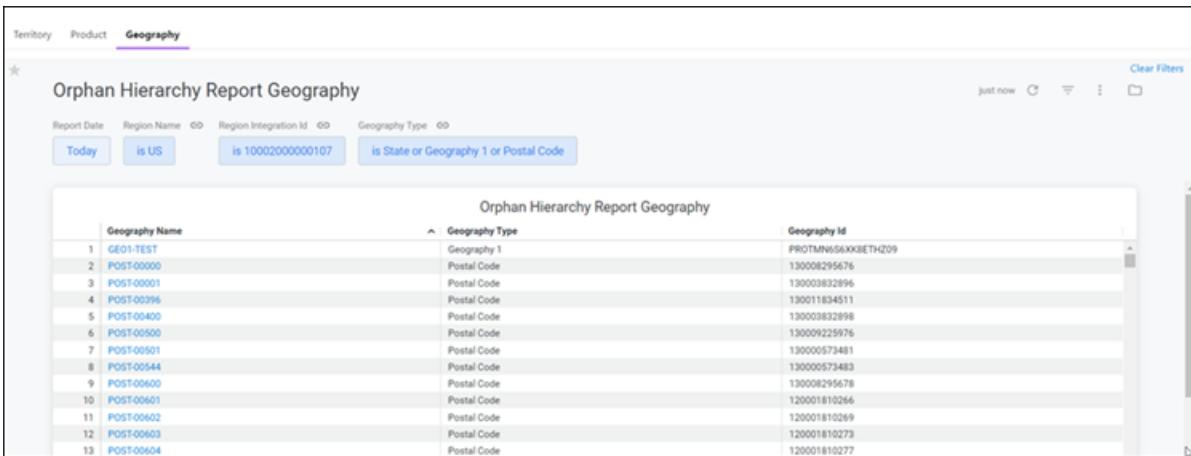
3. Select the **Territory** tab to run the report that lists missing territory records; select the **Product** tab to run the report that lists missing product records; select the **Geography** tab to run the report that lists missing geography records.



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.



Geography Name	Geography Type	Geography Id
1 GEO1-TEST	Postal Code	PROTMW658XK8ETHZ09
2 POST-00000	Postal Code	130008295676
3 POST-00001	Postal Code	130003832396
4 POST-00396	Postal Code	130011834511
5 POST-00400	Postal Code	130003832898
6 POST-00500	Postal Code	130099225976
7 POST-00501	Postal Code	130000573481
8 POST-00544	Postal Code	130000573483
9 POST-00600	Postal Code	130008295678
10 POST-00601	Postal Code	120001810266
11 POST-00602	Postal Code	120001810269
12 POST-00603	Postal Code	120001810273
13 POST-00604	Postal Code	120001810277

[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.

- From the **Reports** tab, in the **Operational Reports** section, click **Unassigned Accounts Report**.

The screenshot shows the Report Launcher interface with the following details:

- Report Launcher** header with a search bar and buttons for **New Folder**, **Reorder**, and **Show All**.
- Reports** section with a dropdown menu for **Operational Reports**.
- Operational Reports** section listing the following reports:
 - Account to Territory Report**: A report showing the list of accounts aligned to territory for a date range.
 - Territory Roster Report**: A report showing the list of territories and the assigned users for a date range.
 - Product Roster Report**: A report showing the list of products and the assigned territories for a date range.
 - Geography Territory Report**: A report showing the list of geographies aligned to territory for a date range.
 - Unassigned Geography Report**: A report showing the list of geographies unassigned to a territory in a particular salesforce.
 - Unassigned Accounts Report**: A report showing high targeted/segmented accounts that are not aligned to any territory or any territory within a sales force.
 - Account Product Restrictions Report**: A report showing list of account product restrictions in date range.
 - Sales Force Analysis**: Sales Force Analysis Report.
 - User Hierarchy Report**: A report showing the list of users for a date range.
 - Account Territory Owner Report**: A report showing list of accounts owned by a territory in date range.
 - Orphan Hierarchy Report Territory**: OrphanHierarchyReportTerritory description.
- Configured Reports** section with a dropdown menu.

- Click **More** to view all report filters.

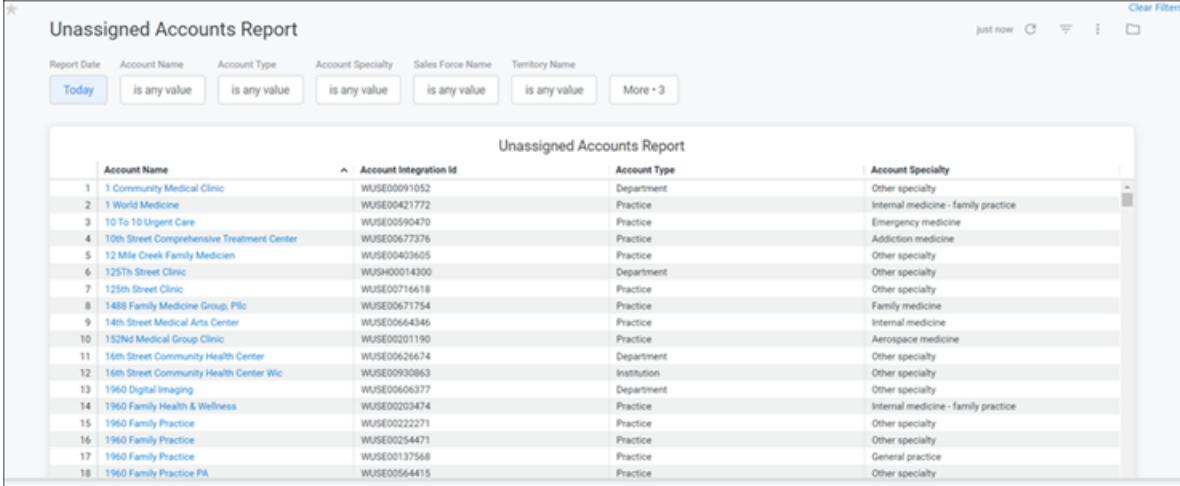
The screenshot shows the **Unassigned Accounts Report** filter interface with the following details:

- Report Date** section with tabs for **Today**, **is any value**, and **More + 3**.
- Account Name** input field with a dropdown menu showing "jiny value".
- Account Type** input field with a dropdown menu showing "any value".
- Account Specialty** input field with a dropdown menu showing "any value".
- Sales Force Name** input field with a dropdown menu showing "any value".
- Territory Name** input field with a dropdown menu showing "any value".
- More** button with a dropdown menu showing:
 - Account Integration Id**: Input field with "jiny value".
 - Sales Force Integration Id**: Input field with "any value".
 - Territory Integration Id**: Input field with "any value".
- Clear Filters** button in the top right corner.

- 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.



The screenshot shows a report titled "Unassigned Accounts Report". At the top, there are several filter buttons: "Report Date" (set to "Today"), "Account Name" (placeholder "is any value"), "Account Type" (placeholder "is any value"), "Account Specialty" (placeholder "is any value"), "Sales Force Name" (placeholder "is any value"), and "Territory Name" (placeholder "is any value"). Below the filters is a "More + 3" button. To the right, there are buttons for "just now", a search icon, and a "Clear Filters" link. The main area displays a table with 18 rows of account data. The columns are: Account Name, Account Integration Id, Account Type, and Account Specialty. The data includes various medical and healthcare organizations like "Community Medical Clinic", "World Medicine", and "10 To 10 Urgent Care".

Unassigned Accounts Report			
Account Name	Account Integration Id	Account Type	Account Specialty
1 Community Medical Clinic	WU\$E00991052	Department	Other specialty
2 World Medicine	WU\$E00421772	Practice	Internal medicine - family practice
3 10 To 10 Urgent Care	WU\$E05990470	Practice	Emergency medicine
4 10th Street Comprehensive Treatment Center	WU\$E0677376	Practice	Addiction medicine
5 12 Mile Creek Family Medicin	WU\$E0403605	Practice	Other specialty
6 125th Street Clinic	WU\$H0014300	Department	Other specialty
7 125th Street Clinic	WU\$E05716618	Practice	Other specialty
8 1488 Family Medicine Group, PLLC	WU\$E0671754	Practice	Family medicine
9 14th Street Medical Arts Center	WU\$E0664346	Practice	Internal medicine
10 152nd Medical Group Clinic	WU\$E0201190	Practice	Aerospace medicine
11 16th Street Community Health Center	WU\$E0626674	Department	Other specialty
12 16th Street Community Health Center Wic	WU\$E0990863	Institution	Other specialty
13 1960 Digital Imaging	WU\$E00606377	Department	Other specialty
14 1960 Family Health & Wellness	WU\$E0203474	Practice	Internal medicine - family practice
15 1960 Family Practice	WU\$E0222271	Practice	Other specialty
16 1960 Family Practice	WU\$E0254471	Practice	Other specialty
17 1960 Family Practice	WU\$E0137568	Practice	General practice
18 1960 Family Practice PA	WU\$E0664415	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**.

The screenshot shows the Report Launcher interface. In the top navigation bar, there is a search bar labeled "Search..." and three buttons: "New Folder", "Reorder", and "Show All". Below the navigation bar, the "Reports" section is expanded, showing the "Operational Reports" category. Inside this category, there are several report cards, each with a thumbnail icon, title, and a brief description. The "Sales Force Analysis" report card is highlighted with a red box. Other reports include "Account to Territory Report", "Product Roster Report", "User Hierarchy Report", "Territory Roster Report", "Unassigned Geography Report", "Account Territory Owner Report", "Geography Territory Report", "Account Product Restrictions Report", "Orphan Hierarchy Report Territory", and "Unassigned Accounts Report". At the bottom of the operational reports section, there is a "Configured Reports" section with a single report card for "Sales Force Analysis".

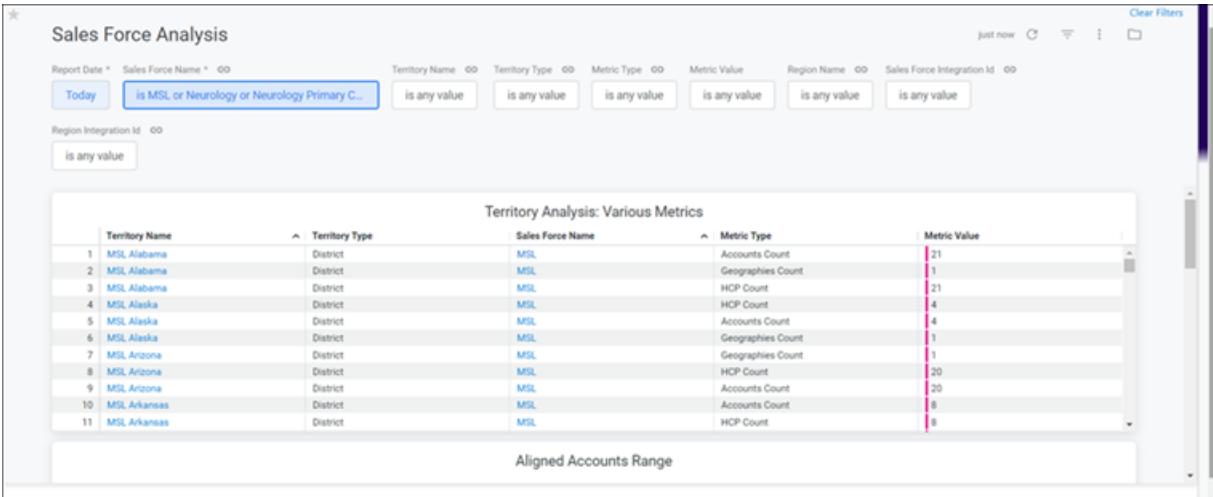
3. Select the **Sales Force Analysis** tab and enter the report filters.

The screenshot shows the "Sales Force Analysis" report page. At the top, there are two tabs: "Sales Force Analysis" (which is selected and highlighted with a red box) and "Sales Force Comparison". Below the tabs, there is a section titled "Sales Force Analysis" with various filter fields. The filter fields include: "Report Date" (with options "Today" and "is MSL or Neurology or Neurology Primary C..."), "Sales Force Name" (with a dropdown menu), "Territory Name" (with a dropdown menu), "Territory Type" (with a dropdown menu), "Metric Type" (with a dropdown menu), "Metric Value" (with a dropdown menu), "Region Name" (with a dropdown menu), "Sales Force Integration Id" (with a dropdown menu), and "Region Integration Id" (with a dropdown menu). To the right of the filters, there are icons for "Clear Filters", "Print", and "Download". Below the filters, there is a preview area titled "Territory Analysis: Various Metrics" which displays a small grid icon.

- 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.



The screenshot shows a report titled "Sales Force Analysis". At the top, there are several filter fields: Report Date (Today), Sales Force Name (is MSL or Neurology or Neurology Primary C...), Territory Name (is any value), Territory Type (is any value), Metric Type (is any value), Metric Value (is any value), Region Name (is any value), Sales Force Integration Id (is any value), and Region Integration Id (is any value). Below the filters is a table titled "Territory Analysis: Various Metrics". The table has columns: Territory Name, Territory Type, Sales Force Name, Metric Type, and Metric Value. The data in the table is as follows:

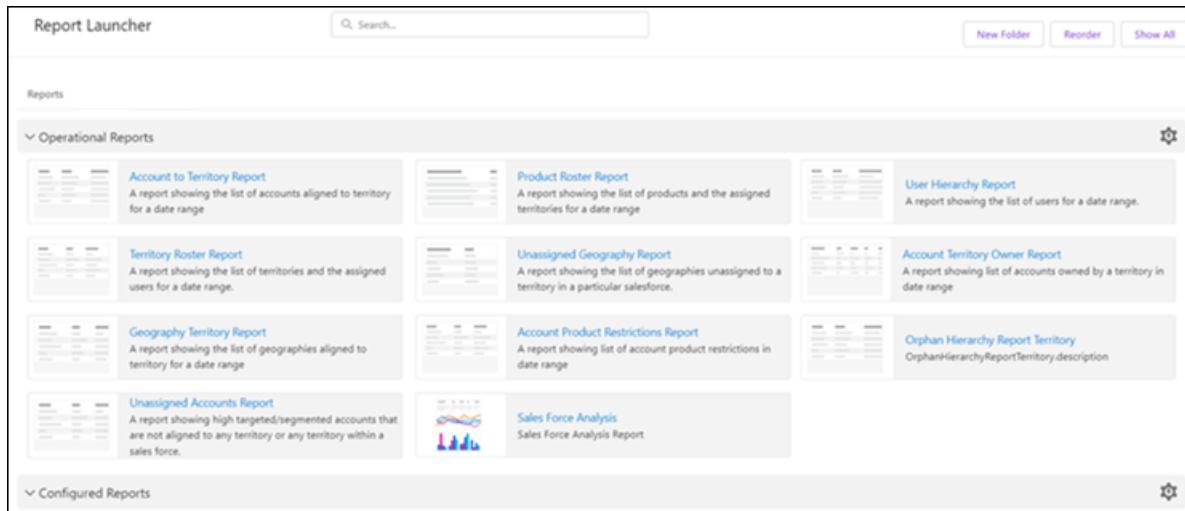
Territory Name	Territory Type	Sales Force Name	Metric Type	Metric Value
1 MSL Alabama	District	MSL	Accounts Count	21
2 MSL Alabama	District	MSL	Geographies Count	1
3 MSL Alabama	District	MSL	HCP Count	21
4 MSL Alaska	District	MSL	HCP Count	4
5 MSL Alaska	District	MSL	Accounts Count	4
6 MSL Alaska	District	MSL	Geographies Count	1
7 MSL Arizona	District	MSL	Geographies Count	1
8 MSL Arizona	District	MSL	HCP Count	20
9 MSL Arizona	District	MSL	Accounts Count	20
10 MSL Arkansas	District	MSL	Accounts Count	6
11 MSL Arkansas	District	MSL	HCP Count	6

Below the table, a message says "Aligned Accounts Range".

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**.



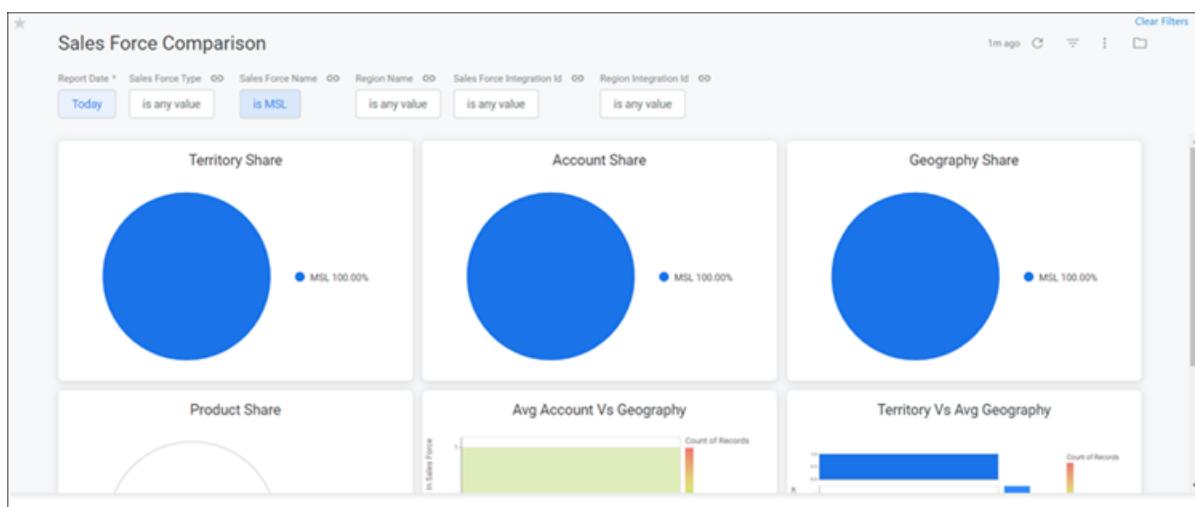
3. Select the **Sales Force Comparison** tab and enter the report filters.

The screenshot shows the 'Sales Force Comparison' tab selected. The top navigation bar has 'Sales Force Comparison' highlighted with a red box. Below the navigation bar, there are filter sections for 'Report Date', 'Sales Force Type', 'Sales Force Name', and 'Region Name'. The 'Report Date' section has a 'Today' button and a dropdown menu. The 'Sales Force Type' section has a dropdown menu with the option 'is MSL or Neurology or Neurology Primary C...'. The 'Sales Force Name' section has a dropdown menu with the option 'is any value'. The 'Region Name' section has three dropdown menus, each with the option 'is any value'. Below the filters are three circular charts labeled 'Territory Share', 'Account Share', and 'Geography Share', each with a progress bar underneath.

- 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

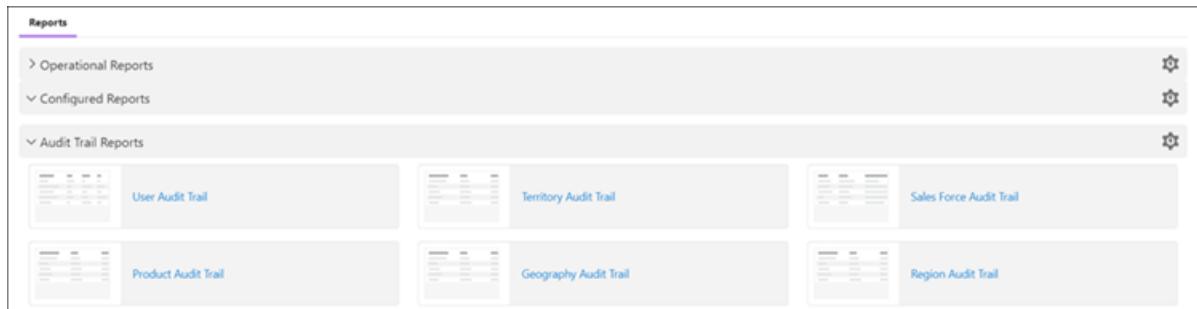
Home Office users (global and regional) can track who made a change and when they made the change with Audit Trail Reports. Access Audit Trail Reports on the **Reports** tab from the **Reports** module.

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.

- From the **Reports** tab, in the **Audit Trail Reports** section, click **User Audit Trail**.

- 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.

- Click Load  to view the report.

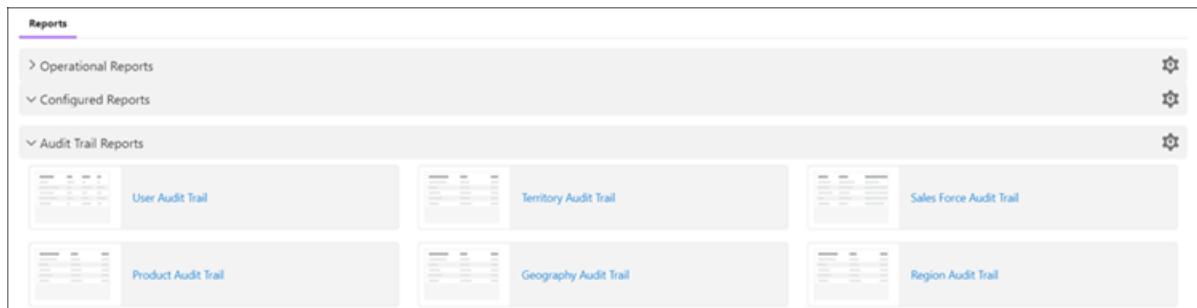
	User Name	User Integration Id	Operation	Modified By	Modified Date	Field Name	Old Value	New Value
1	Andres Cobb M	DT0E045V30JUXDF01	Update	System Admin	2022-10-14 11:01:26	Name	Andres Cobb	Andres Cobb M

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**.

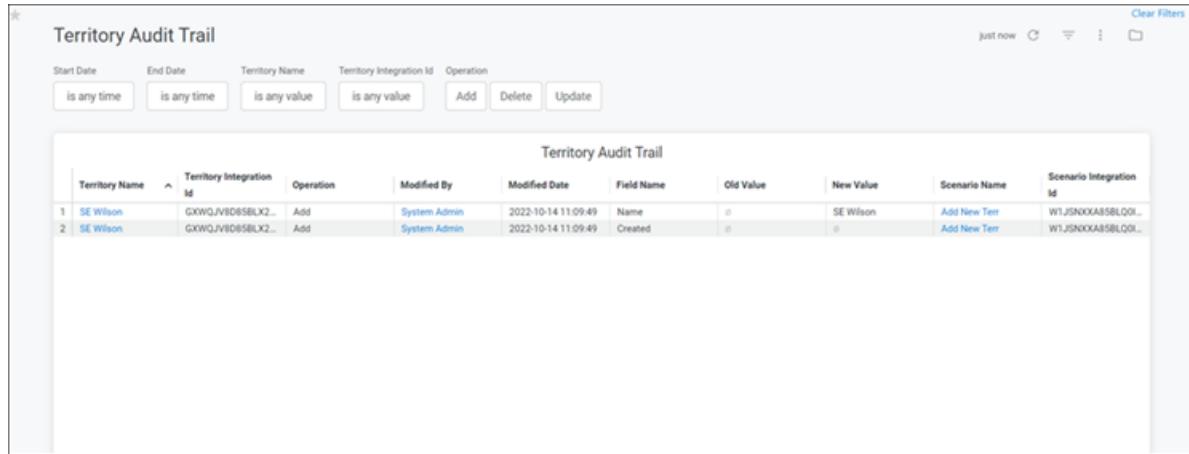


3. Enter the criteria for the report.

A screenshot of the 'Territory Audit Trail' report interface. At the top, there is a filter bar with fields for 'Start Date', 'End Date', 'Territory Name', 'Territory Integration Id', and 'Operation'. The 'Operation' field is highlighted with a red box. Below the filter bar is a table titled 'Territory Audit Trail' with columns: Territory Name, Territory Integration Id, Operation, Modified By, Modified Date, Field Name, Old Value, New Value, Scenario Name, and Scenario Integration Id. The table contains several rows of audit trail data.

- **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.

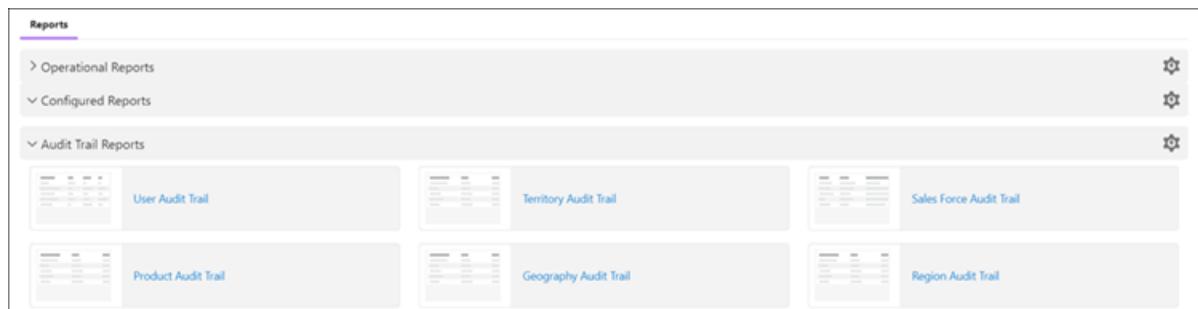


View the Sales Force Audit Trail Report

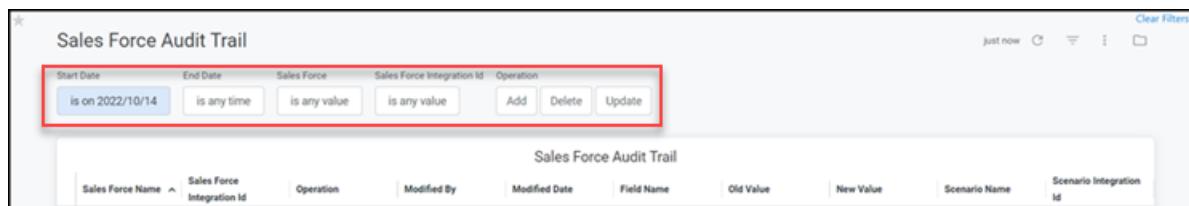
The Sales Force Audit Trail report includes details on field changes in the **Sales Forces** module, who made the change, and when the change was made.

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**.

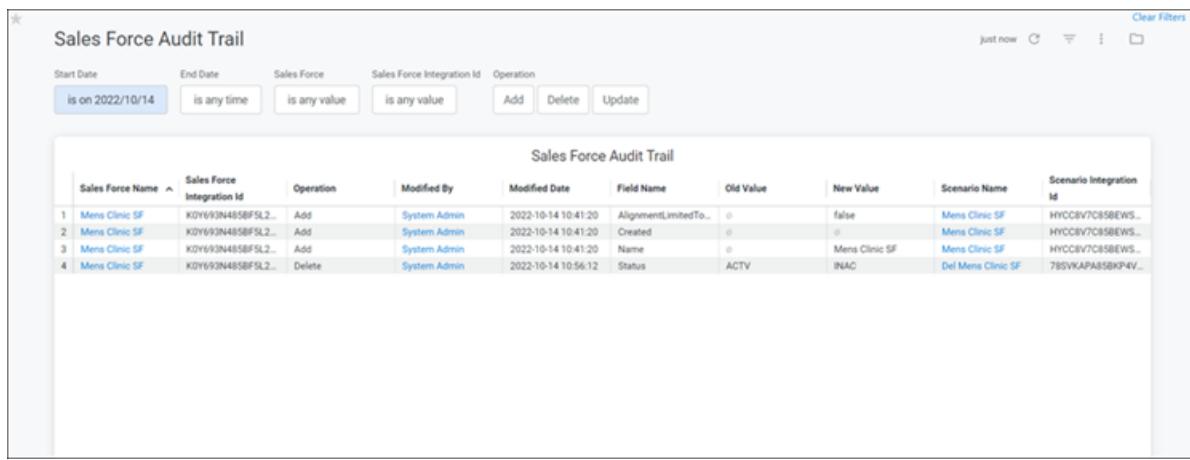


3. Enter the criteria for the report.



- **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.



Sales Force Audit Trail									
Sales Force Name	Sales Force Integration Id	Operation	Modified By	Modified Date	Field Name	Old Value	New Value	Scenario Name	Scenario Integration Id
1 Mens Clinic SF	KOY693N485BF5L2...	Add	System Admin	2022-10-14 10:41:20	AlignmentLimitedTo...	<input checked="" type="radio"/>	false	Mens Clinic SF	HYCC8V7C85BEWS...
2 Mens Clinic SF	KOY693N485BF5L2...	Add	System Admin	2022-10-14 10:41:20	Created	<input checked="" type="radio"/>	<input checked="" type="radio"/>	Mens Clinic SF	HYCC8V7C85BEWS...
3 Mens Clinic SF	KOY693N485BF5L2...	Add	System Admin	2022-10-14 10:41:20	Name	<input checked="" type="radio"/>	Mens Clinic SF	Mens Clinic SF	HYCC8V7C85BEWS...
4 Mens Clinic SF	KOY693N485BF5L2...	Delete	System Admin	2022-10-14 10:56:12	Status	ACTV	INAC	Del Mens Clinic SF	78SVKAPA85BKPV4...

[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.

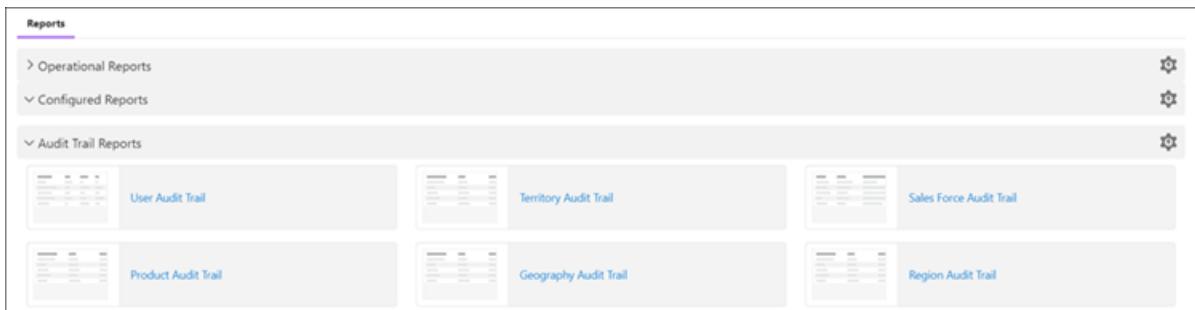
Product Name	Product Integration Id	Operation	Modified By	Modified Date	Field Name	Old Value	New Value
1 Nedosome	FDTGHK078583MPZR2X	Delete	System Admin	2022-10-14 09:56:56	Status	ACTV	INAC
2 Nedosome	FDTGHK078583MPZR2X	Add	System Admin	2022-10-14 09:52:45	Name		Nedosome
3 Nedosome	FDTGHK078583MPZR2X	Add	System Admin	2022-10-14 09:52:45	Created		

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**.

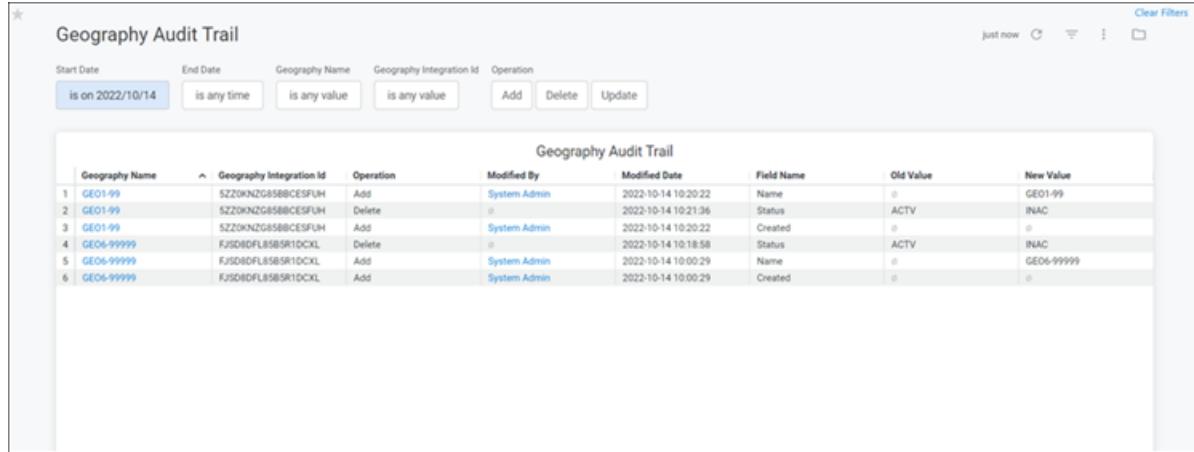


3. Enter the criteria for the report.

A screenshot of the 'Geography Audit Trail' report search interface. At the top, there's a filter section with four dropdown menus: 'Start Date' (set to 'is on 2022/10/14'), 'End Date' (set to 'is any time'), 'Geography Name' (set to 'is any value'), and 'Geography Integration Id' (set to 'is any value'). Below the filters is a table header with columns: Geography Name, Geography Integration Id, Operation, Modified By, Modified Date, Field Name, Old Value, and New Value. The table body is currently empty.

- **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.



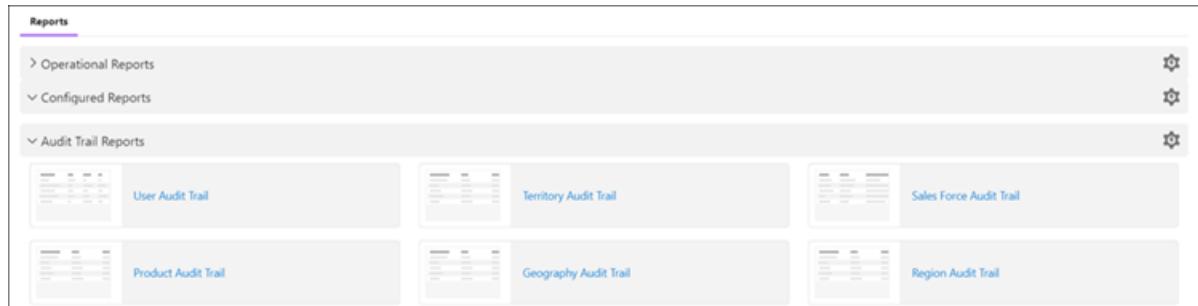
Geography Name	Geography Integration Id	Operation	Modified By	Modified Date	Field Name	Old Value	New Value
1 GEO1-99	SZ20KNZG858BCESFUH	Add	System Admin	2022-10-14 10:20:22	Name	○	GEO1-99
2 GEO1-99	SZ20KNZG858BCESFUH	Delete	○	2022-10-14 10:21:06	Status	ACTV	INAC
3 GEO1-99	SZ20KNZG858BCESFUH	Add	System Admin	2022-10-14 10:20:22	Created	○	○
4 GEO6-99999	FJ5D8DFL85B5R1DCXL	Delete	○	2022-10-14 10:18:58	Status	ACTV	INAC
5 GEO6-99999	FJ5D8DFL85B5R1DCXL	Add	System Admin	2022-10-14 10:00:29	Name	○	GEO6-99999
6 GEO6-99999	FJ5D8DFL85B5R1DCXL	Add	System Admin	2022-10-14 10:00:29	Created	○	○

View the Region Audit Trail Report

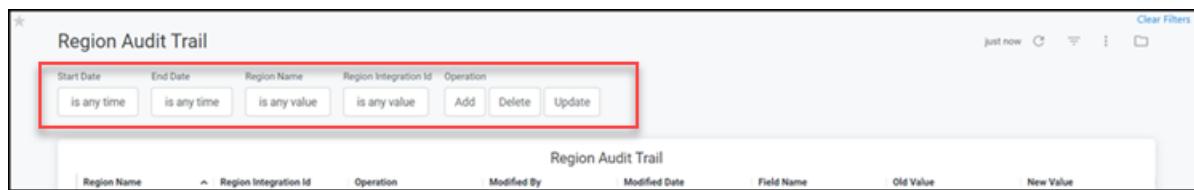
The Region Audit Trail report includes details on field changes in the **Regions** module, who made the change, and when the change was made.

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**.



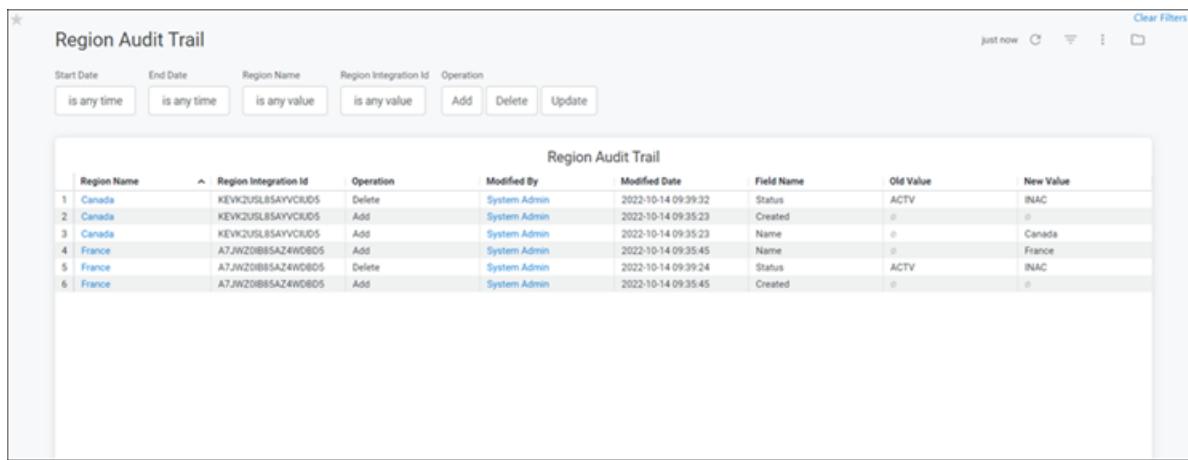
3. Enter the criteria for the report.



Region Name	Region Integration Id	Operation	Modified By	Modified Date	Field Name	Old Value	New Value

- **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.



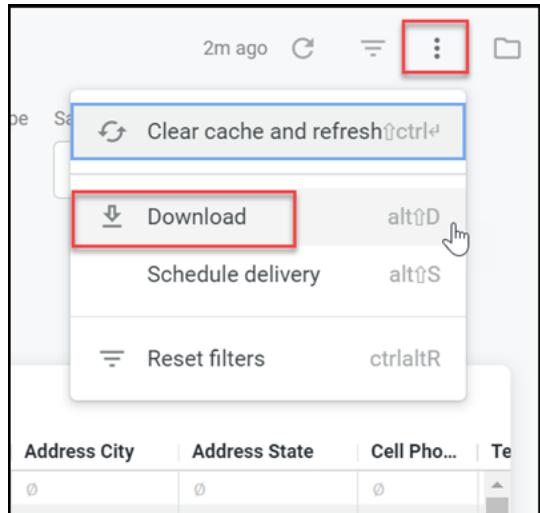
Region Audit Trail							
Region Name	Region Integration Id	Operation	Modified By	Modified Date	Field Name	Old Value	New Value
1 Canada	KEVK2USL8SAYVCID5	Delete	System Admin	2022-10-14 09:39:32	Status	ACTV	INAC
2 Canada	KEVK2USL8SAYVCID5	Add	System Admin	2022-10-14 09:35:23	Created		
3 Canada	KEVK2USL8SAYVCID5	Add	System Admin	2022-10-14 09:35:23	Name		Canada
4 France	A7JWZ0IB85AZ4WD8D5	Add	System Admin	2022-10-14 09:35:45	Name		France
5 France	A7JWZ0IB85AZ4WD8D5	Delete	System Admin	2022-10-14 09:39:24	Status	ACTV	INAC
6 France	A7JWZ0IB85AZ4WD8D5	Add	System Admin	2022-10-14 09:35:45	Created		

Export Report Results to CSV

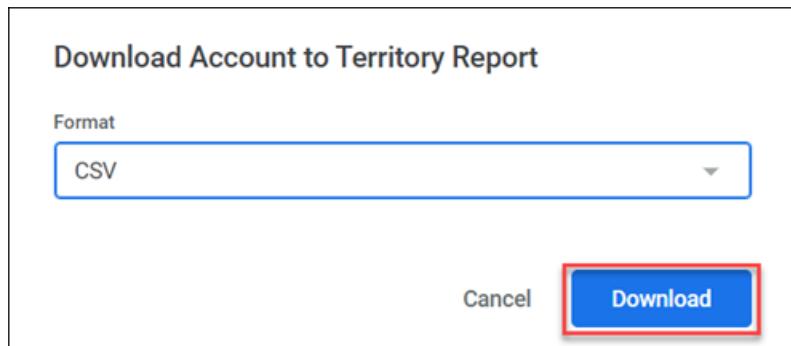
Once a report is run, you can export report results to a CSV file. A CSV file displays report data in text format separated by commas.

To export report results to CSV

- From a report results page, click  and select **Download**.

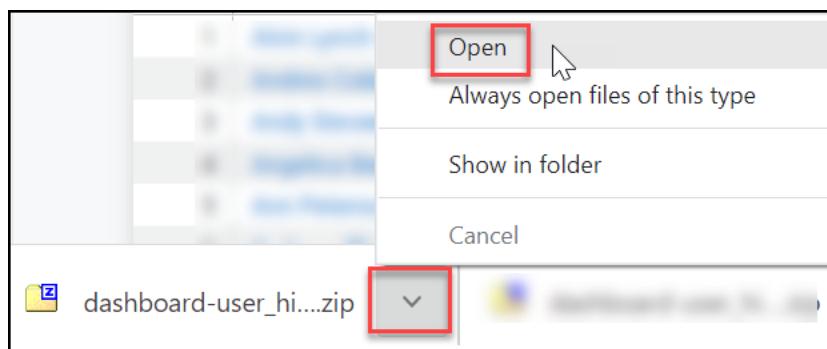


- From the **Format** drop-down box, select **CSV**, then click **Download**.



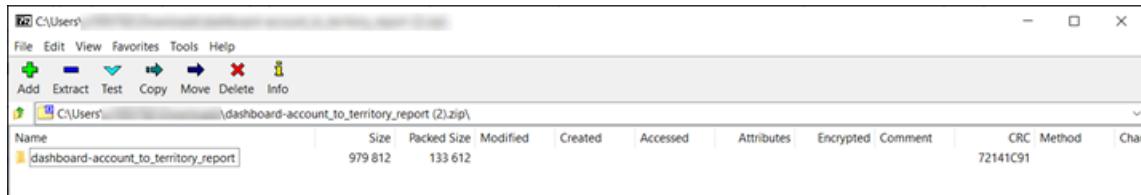
When the download is complete, the minimized file displays at the bottom left of the screen.

- Click , then click **Open** to view the file.



The downloaded file displays from the location in which it is stored.

- Double-click the file name to open the file.



The report results display.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1		User Name	User Integ	User Role	Address T	Address L	Address C	Address S	Cell Phon	Territory	Territory	User Assig	User Assig	User Assig	Sales Force	Sales Force	Integration Id	
2	1 Alvin Lync	13AWE83QBIY3M7CP							Vaccine B	45HBXHA	Primary	5/1/2021		Vaccine SF	GLW3PV8X3OJ7E8RU1			
3	2 Andre Co	DTQE045V30IUXDFQ1							Vaccine C	AB3BN4TL	Primary	5/1/2021		Vaccine SF	GLW3PV8X3OJ7E8RU1			
4	3 Andy Stev	7E7CBDV530IWI5Z2E7D							MSL East	1QRPAUCH	Primary	5/1/2021		MSL	Y6ZSNK23OJ890GTHL			
5	4 Angelica B	YIJTNV4B3OJ4O2ZLWLP							Neurology	LHSCK6MI	Primary	6/1/2021		Neurology	PSTOA	ZU3OJDAP4UQH		
6	5 Ann Peter	TXT340GG3OIQ03917D							Vaccine W	WJUPBYDM	Primary	5/1/2021		Vaccine SF	GLW3PV8X3OJ7E8RU1			
7	6 Archana B	NK9UHXCS30I1QN0B1							MSL Arizo	0XVV8DE2	Primary	5/1/2021		MSL	Y6ZSNK23OJ890GTHL			
8	7 Ashley N	UK2C9AKK30ILXAFAYX							Vaccine C	AB3BN4TL	Primary	5/1/2021		Vaccine SF	GLW3PV8X3OJ7E8RU1			
9	8 Bert Huff	ONGEVVMXF30IU6Y9U61							MSL Calif	HUIBZID13	Primary	5/1/2021		MSL	Y6ZSNK23OJ890GTHL			
10	9 Blake Trar	Z7F3QFG130IKVIZE9L							MSL India	EV6WY04L	Primary	5/1/2021		MSL	Y6ZSNK23OJ890GTHL			
11	10 Celia Kim	0I8J32UM30IOWGFHE1L							Neurology	ANSJ1E0V	Primary	7/1/2021		Neurology	7P3l0FGM30JDGGCRU1			
12	11 Christopher	R169BT0V3QBJSIP7QX							Vaccine N	PPY62ZND	Primary	5/1/2021		Vaccine SF	GLW3PV8X3OJ7E8RU1			
13	12 Clara Bow	G3MZSV8130I2VG40ZD							MSL Mid-	/UK3AES08	Primary	5/1/2021		MSL	Y6ZSNK23OJ890GTHL			
14	13 Cristina W	U4XUJX030IQW9GGQ1							Vaccine C	AB3BN4TL	Primary	5/1/2021		Vaccine SF	GLW3PV8X3OJ7E8RU1			
15	14 Debbie W	3LKOEZTV30I4X7MM1																
16	15 Denise Sh	GC8FO5ZR30INBSQ5W9																
17	16 Devin Cla	HFOFFPERL30IR4ILWQX																
18	17 Dewey Co	GKLMRZ6F30IWTCT3XUH																
19	18 Dexter Ry	OTBMR5VS30ITZT0FO9																
20	19 Diana Law	HF8DHRMK3QBIOKVHO9																

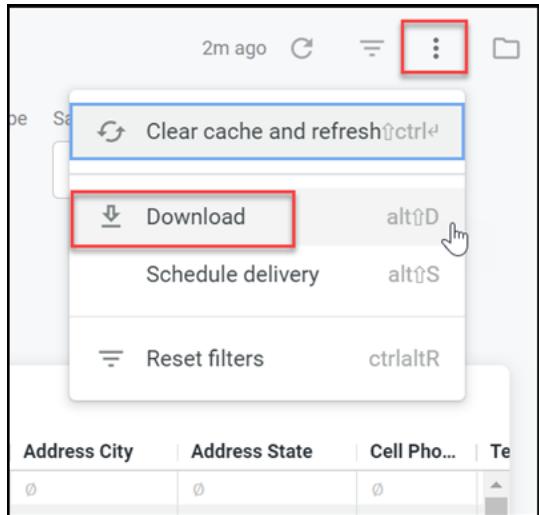
You can also export report results to PDF. See [Export Report Results to PDF](#).

Export Report Results to PDF

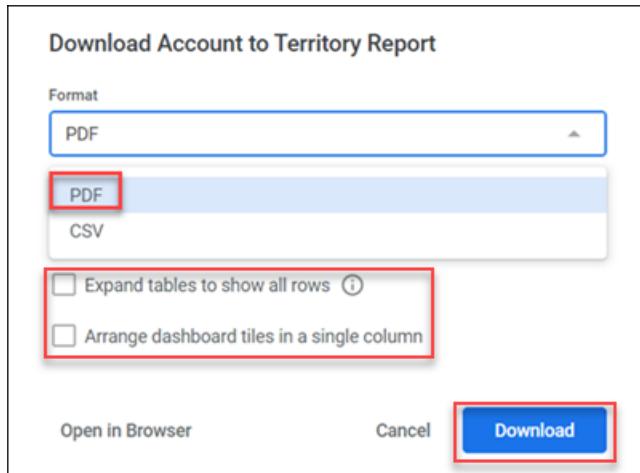
Once a report is run, you can export report results to a PDF file.

To export report results to PDF

1. From a report results page, click  and select **Download**.

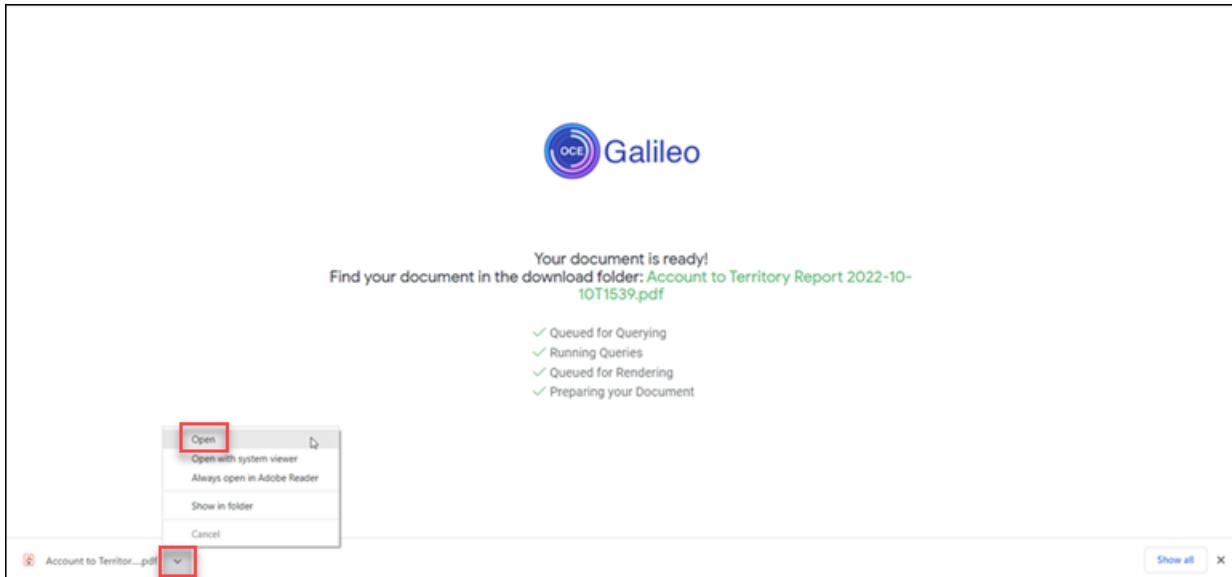


2. From the **Format** drop-down, select **PDF**. Select the paper size, and select or deselect the check boxes regarding row expansion and dashboard arrangement. Click **Download**.



A separate browser tab opens, showing the progress of the download.

3. Click , then click **Open** to view the file.



The report results display.

Account to Territory Report											
Account Name	Account Integration Id	Account Type	Account Specialty	Source	Reason	Territory Name	Territory Integration Id	Account Territory Effective Date	Account Territory End Date	Sales Force Name	Sales Force Integration Id
1 Zynab Puse	WUJ0M0073142	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Hamilton ..	T05HVC0SP9Q0A..	2022-06-01		Vaccine SF	GU0PVI003017E..
2 Zynab Hassan	WUJ0M0073972	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Broward C..	2JHD379QSP9F9..	2022-06-01		Vaccine SF	GU0PVI003017E..
3 Zweile Rural Clinic	WUJ0M0075812	Practice	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine De Soto Pa..	2EGRICAA3SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
4 Zweile Rural Clinic	WUJ0M0075812	Practice	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Red River P..	EKHNMCDD0SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
5 Zweile Rural Clinic	WUJ0M0075812	Practice	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Selma Par..	E11TBWAK0SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
6 Zweile Rural Clinic	WUJ0M0075812	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine St. Louis Pa..	E11TBWAK0SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
7 Zel-Adam Schreiber	WUJ0M00143180	Medical Professional	Hematology - on	Dynamic	MIS_Zip_Tier_and_L..	MIS_NY New York	JN5D0VTA1Q0L..	2022-06-01		MIS	YDZK0H230J89C
8 Zel-Beinouf	WUJ0M00208115	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Orange Co..	3FCRHM0SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
9 Zesvan Anthony, D.	WUJ0E1083648	Practice	Other specialty	Dynamic	Vaccine SF MP rule	Vaccine SF MP rule	MLXK80773P9A..	2022-06-01		Vaccine SF	GU0PVI003017E..
10 Zesvan Anthony, D.	WUJ0E1083648	Practice	Other specialty	Dynamic	Vaccine SF MP rule	Vaccine Rockingham ..	3K7Q5QH2SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
11 Zepetane Deekh Qz.	WUJ0M0123605	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Wokingham ..	SAJMSDN2SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
12 Zepetane Deekh Qz.	WUJ0M0123605	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Bedford ..	VJUJAHMK0SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
13 Zepetane Deekh Qz.	WUJ0M0123605	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Tadworth ..	Y4PQ0H00SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
14 Zesvina Nomura	WUJ0M0073799	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Stevenage C..	UWQG0000SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
15 Zuchika Family Me..	WUJ0M01020147	Practice	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Monroe ..	V2Z250SP0P9Q0..	2022-06-01		Vaccine SF	GU0PVI003017E..
16 Zunaid Ehsani G, D.	WUJ0E0011427	Practice	Other specialty	Dynamic	Vaccine SF MP rule	Vaccine Luton Co..	JN5H4T0V9P9R9..	2022-06-01		Vaccine SF	GU0PVI003017E..
17 Zunaid Ehsani G, D.	WUJ0E0011427	Practice	Other specialty	Dynamic	Vaccine SF MP rule	Vaccine Wyoming ..	001270H0TSP9V9..	2022-06-01		Vaccine SF	GU0PVI003017E..
18 Zunera Yedla	WUJ0M0107995	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Sussex Co..	A02YK0H2SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
19 Zunera Yedla	WUJ0M0107995	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Basingstoke ..	NAM6D9SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
20 Zunera Yedla	WUJ0M0107995	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Morris Co..	08000000SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
21 Zunera Chaudry	WUJ0M0123602	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Oxfordshire ..	BTVCJAA0P9A..	2022-06-01		Vaccine SF	GU0PVI003017E..
22 Zunera Chaudry	WUJ0M0123602	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Northampton ..	ZVBQL0K3SP9S9..	2022-06-01		Vaccine SF	GU0PVI003017E..
23 Zunarah Syed	WUJ0M01373367	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Klamath C..	U2MFL0Bn0SP9F..	2022-06-01		Vaccine SF	GU0PVI003017E..
24 Zunarah Syed	WUJ0M01373367	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Sonoma C..	B25H0K0SP9C..	2022-06-01		Vaccine SF	GU0PVI003017E..
25 Zunara Ahmad	WUJ0M03816299	Medical Professional	Family medicine	Dynamic	Vaccine SF MP rule	Vaccine Cedar Coun..	REKWWO0MP9SP9..	2022-06-01		Vaccine SF	GU0PVI003017E..

Generated by Looker on October 10, 2022 at 12:37 PM PDT

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