

Territory Organizer – User Manual v1.1

Table of Contents

Introduction	2
Territories.....	3
Publishers.....	8
Field Service Groups.....	9
Reports.....	12
Map.....	13
Print.....	14
Options.....	15
Symbols.....	16
Data Backup	17

Introduction

The Territory Organizer program allows for the managing of Territories in a Congregation. It is of note that this program is intended to be used as a help. Normal organization procedures should still be maintained.

The program allows for the management of Territories, Homes, Publishers, Field Service Groups, Territory Maps, Check-In/Check-Out of Territory, Printing the Territory and running reports.

Here is a Quick rundown of how to use the program:

1. First create your territories in the Territory tab. (You don't have to create them all at once but at least one)
2. Add the house-to-house data in the Homes tab for a territory.
3. Add the Publishers data in the Publishers tab.
4. Add the Field Service Groups data in the Field Service Groups tab. (this is optional)
5. Add a Map of the Territory in the Map tab
6. Check out/Check-in Territories from the Territories tab
7. Print territories from the Print tab
8. Run reports from the Reports tab. My favorite report is "All Territories sorted by Least Worked", this will help you hand out the least worked territories.

Territories

This is the main tab of the program. In this tab you create all your Territories.

Creating a new Territory

To create a new Territory, click on the Territories List on the right and select “Insert New Territory”:

The screenshot shows the 'Territory Organizer' application window. The 'Territories' tab is active. On the left, the 'Insert New Territory' form contains fields for Territory Number, Description, Location, Image, City, State, ZipCode, and Comments. An 'Insert' button and an 'Active' checkbox are at the bottom. On the right, the 'Territories List (7 territories)' panel shows a table with columns 'TerrNum', 'Description', and 'Check-Out Info'. The 'Sort Order' is set to 'Territory Number'. The table lists 7 territories, with 'Insert New Territory' highlighted as the first entry.

TerrNum	Description	Check-Out Info
	Insert New Territory	
1	Territory 1	Territory has never beer
2	Territory 2	Territory was checked-c
3	Territory 3	Territory was checked t
4	Territory 4	Territory was checked t
5	Territory 5	Territory was checked t
6	Territory 6	Territory was checked t
7	Territory 7	Territory has never beer

Once you have entered the information for a new territory, click on the “Insert” button on the bottom to create the new territory.

Territories List

The right panel is called the “Territories List”. This panel contains the list of all the territories. To make changes to a specific territory, select it from the list on the right. Also notice the “Sort Order” at the top which lets you sort the territories list by either (Territory Number) or (Next Out). “Next Out” sorts by placing the least worked territory on the top of the list.

Updating a Territory

To update a territory, select it from the Territories List on the right. Once done making the changes, click on the “Update” button. Note: If you leave the screen and update the territory without clicking on the “Update” button, the changes will not be saved.

Checking out a Territory

To check-out a territory, first select the Territory from the Territories List and click on the Check-Out button:

The screenshot shows the 'Territory Organizer' application window. The 'Territories' tab is selected. The 'Update Existing Territory' form on the left has the following fields: Territory Number (7), Description (Territory 7), Location, Image, City, State, ZipCode, and Comments. The 'Check-Out' button is visible. The 'Territories List (7 territories)' on the right shows a table with columns: TerrNum, Description, and Check-Out Info. The table contains 7 rows, with the 7th row (Territory 7) highlighted in blue.

TerrNum	Description	Check-Out Info
	Insert New Territory	
1	Territory 1	Territory has never been checked out
2	Territory 2	Territory was checked out
3	Territory 3	Territory was checked out
4	Territory 4	Territory was checked out
5	Territory 5	Territory was checked out
6	Territory 6	Territory was checked out
7	Territory 7	Territory has never been checked out

You will then enter the check-out information. At this point you can also set the Check-Out date by clicking on the "Override check-out date" checkbox. Note: You only need to click on the "Override check-out date" checkbox if the Check-Out date is different from Today's date:

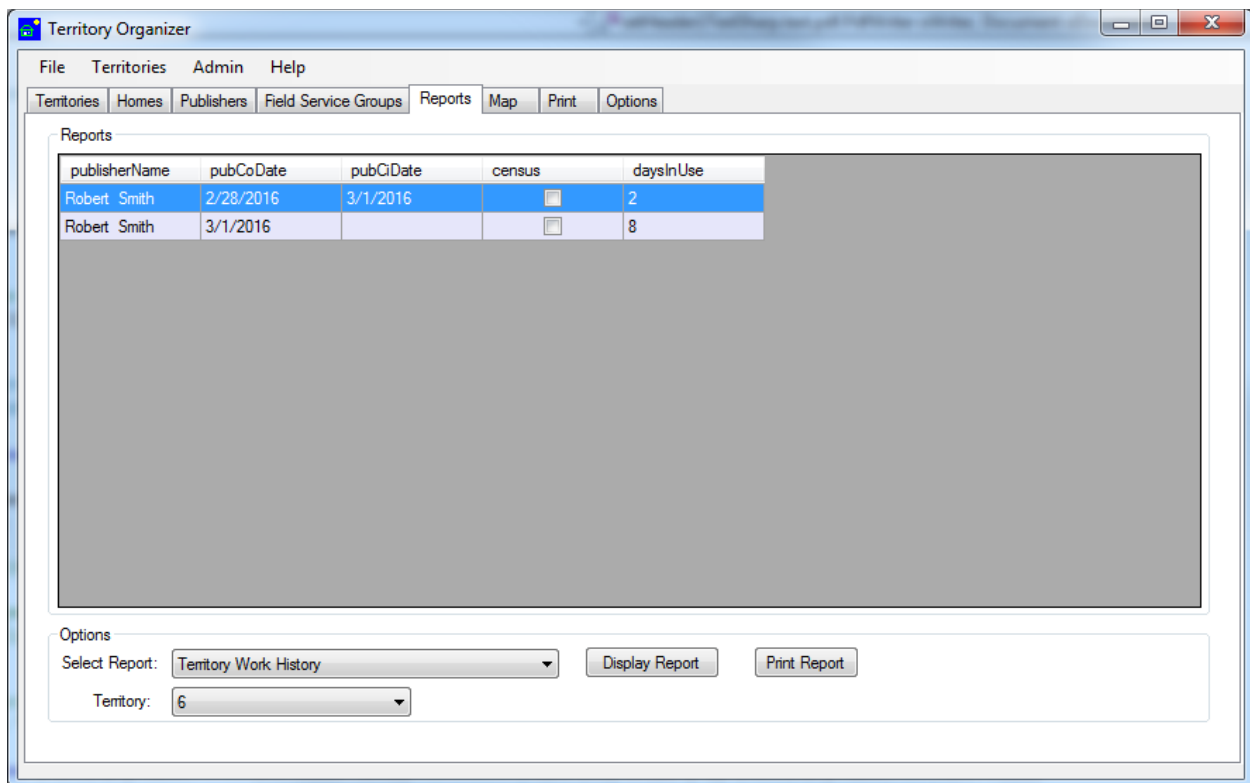
The screenshot shows the 'Check-Out Territory' dialog box. It has a 'Select territory and publisher' section with 'Territory' (6) and 'Publisher' (Smith, Robert) dropdowns. Below these are checkboxes for 'Override check-out date' (checked) and 'Census'. The 'Override check-out date' checkbox is followed by a date field showing '3/ 1/2016'. At the bottom are 'Check-Out' and 'Cancel' buttons.

Checking in a Territory

To check-in a territory, first select the Territory from the Territories List and click on the Check-In button. The same procedure as checking out can be used to override the check-in date. Note: The check-in button will only be available for Territories that are checked out.

Work History

To see the Territory Work History, first select the Territory from the Territories list on the right, then click on the “Work History” button on the bottom. This will take you to the “Reports” tab and show you the Work History of the selected Territory. To return to the Territories, click on the “Territories” tab.



Deleting the work history

To delete the work history for a territory, first go to the Territories tab. Then from the Territories List on the right side, right click on the Territory and select “Delete Work History”, confirm that you would like to delete the Territory Work History by clicking on “Yes”. Note: There is no method to bring back the Territory Work History once it has been deleted.

Deactivate a Territory

To mark a Territory as not active, remove the checkbox and click on the “Update” button:

Update Existing Territory

Territory Number

7


Description

Territory 7

Location

Image

...



City

State

ZipCode

Comments

Update

Check-Out

Work History

☐ Active

Territories List (7 territories)

Sort Order: Territory Number

TerNum	Description	Check-Out Info
	Insert New Territory	
1	Territory 1	Territory has never beer
2	Territory 2	Territory was checked-c
3	Territory 3	Territory was checked b
4	Territory 4	Territory was checked b
5	Territory 5	Territory was checked b
6	Territory 6	Territory was checked-c
7	Territory 7	Territory has never beer

Permanently deleting a territory

To permanently delete a territory, first go to the Territories tab. Then from the Territories List on the right side, right click on the Territory and select “Delete Territory”, confirm that you would like to delete the Territory by clicking on “Yes”. Note: Once a Territory is deleted, all its data is removed including its history. Also, there is no method to bring back the Territory once it has been deleted.

Territories List (7 territories)

Sort Order: Territory Number

TerNum	Description	Check-Out Info
	Insert New Territory	
1	Territory 1	Territory has never beer
2	Territory 2	Territory was checked-c
3	Territory 3	Territory was checked b
4	Territory 4	Territory was checked b
5	Territory 5	Territory was checked b
6	Territory 6	Territory was checked-c
7	Territory 7	Territory has never beer

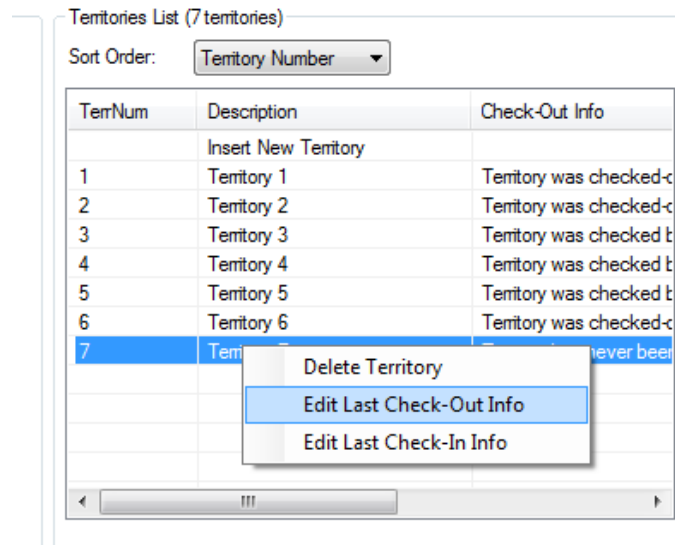
Delete Territory

Edit Last Check-Out Info

Edit Last Check-In Info

Editing the last Check-Out\Check-In info

It is possible to edit the last Check-Out\Check-In info for a Territory. First go to the Territories tab. Then from the Territories List on the right side, right click on the Territory and select either "Edit Last Check-Out Info" or "Edit Last Check-In Info". Note: It is only possible to edit the last Check-Out\Check-In info and not further back.



The screenshot displays the 'Territories List (7 territories)' interface. At the top, there is a 'Sort Order:' dropdown menu set to 'Territory Number'. Below this is a table with three columns: 'TerrNum', 'Description', and 'Check-Out Info'. The table contains seven rows. The first row is 'Insert New Territory'. The subsequent rows are 'Territory 1' through 'Territory 6', each with a corresponding 'Check-Out Info' value. The seventh row, 'Territory 7', is highlighted in blue. A right-click context menu is open over this row, showing three options: 'Delete Territory', 'Edit Last Check-Out Info' (which is highlighted in blue), and 'Edit Last Check-In Info'. The 'Check-Out Info' for Territory 7 is partially visible as 'never been'.

TerrNum	Description	Check-Out Info
	Insert New Territory	
1	Territory 1	Territory was checked-c
2	Territory 2	Territory was checked-c
3	Territory 3	Territory was checked b
4	Territory 4	Territory was checked b
5	Territory 5	Territory was checked b
6	Territory 6	Territory was checked-c
7	Territory 7	never been

Publishers

The publishers tab contains a list of all the publishers.

Creating a new Publisher

To create a new Publisher, click on the Publishers List on the right and select “Insert New Publisher”:

Territory Organizer

File Territories Admin Help

Territories Homes **Publishers** Field Service Groups Reports Map Print Options

Insert New Publisher

First Name: M: ☐ Last Name:

Address: Apt:

City: State: Zip Code:

Phone: Fax:

E-Mail: Publisher ID:

Comments:

Field Service Group:

Publishers List (14 publishers)

Id	Publisher
	Insert New Publisher
11	Abuki, Arnold
12	Anders, Ron
5	Anderson, Alfred
7	Gonzalez, Alby
6	Gonzalez, Maria
13	Landers, Beth
3	McDonald, Ronald
9	Petales, Betulia
4	Ramirez, Manuel
10	Robins, Peter
14	Rodgers, Donald
2	Rodriguez, Albert
1	Smith, Robert
8	Valenzuela, Rodolfo

Updating a Publisher

To update a Publisher, select it from the Publishers List on the right. Once done making the changes, click on the “Update” button. Note: If you leave the screen and update the publisher without clicking on the “Update” button, the changes will not be saved.

Field Service Group

To assign a Publisher to a specific Field Service Group, select the field service group the publisher belongs to and click on the Update button.

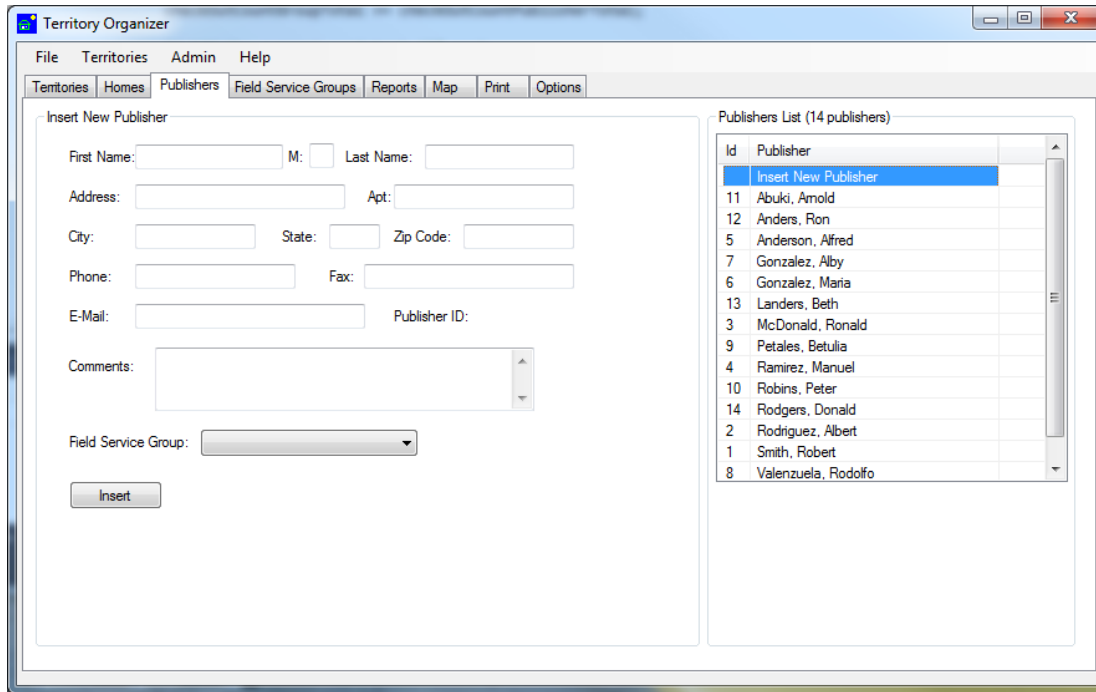
Permanently deleting a Publisher

To permanently delete a Publisher, first go to the “Publishers” tab. Then from the Publishers List on the right side, right click on the Publisher and select “Delete Publisher”, confirm that you would like to delete the Publisher by clicking on “Yes”. Note: Once a Publisher is deleted, all its data is removed including the Territory Work History for that publisher. Also, there is no method to bring back the Publisher once it has been deleted. For this reason it is recommend to deactivate(by removing the ‘Active’ checkbox for the publisher) instead of deleting them.

Field Service Groups

How to setup field service groups

First create all the publishers from the publishers tab:



Insert New Publisher

First Name: M: ☐ Last Name:

Address: Apt:

City: State: Zip Code:

Phone: Fax:

E-Mail: Publisher ID:

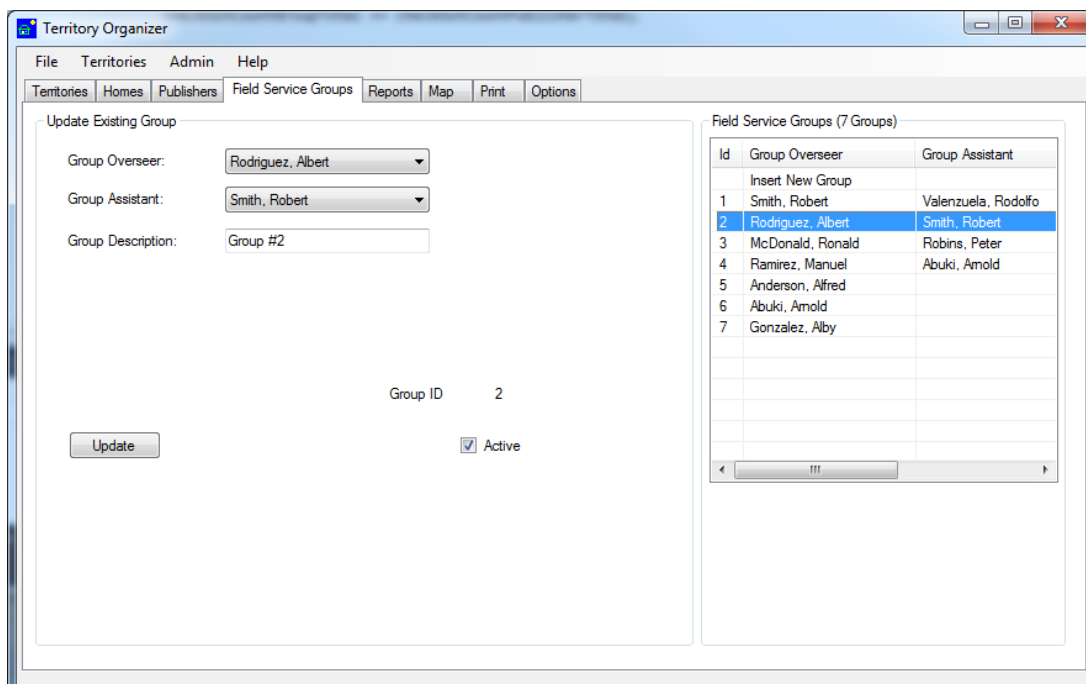
Comments:

Field Service Group:

Publishers List (14 publishers)

Id	Publisher
	Insert New Publisher
11	Abuki, Arnold
12	Anders, Ron
5	Anderson, Alfred
7	Gonzalez, Alby
6	Gonzalez, Maria
13	Landers, Beth
3	McDonald, Ronald
9	Petales, Betulia
4	Ramirez, Manuel
10	Robins, Peter
14	Rodgers, Donald
2	Rodriguez, Albert
1	Smith, Robert
8	Valenzuela, Rodolfo

Then create all the field service groups from the “Field Service Groups” tab. Type in a description of the group such as “Group #1”. Then select the Group overseer and optionally select the assistant:



Update Existing Group

Group Overseer:

Group Assistant:

Group Description:

Group ID: 2

☒ Active

Field Service Groups (7 Groups)

Id	Group Overseer	Group Assistant
	Insert New Group	
1	Smith, Robert	Valenzuela, Rodolfo
2	Rodriguez, Albert	Smith, Robert
3	McDonald, Ronald	Robins, Peter
4	Ramirez, Manuel	Abuki, Arnold
5	Anderson, Alfred	
6	Abuki, Arnold	
7	Gonzalez, Alby	

From the Publishers Tab, proceed to assign all the publishers to their respective field service group and click update for each one:

Territory Organizer

File Territories Admin Help

Territories Homes Publishers Field Service Groups Reports Map Print Options

Update Existing Publisher

First Name: Manuel M: ☐ Last Name: Ramirez

Address: Apt:

City: State: Zip Code:

Phone: Fax:

E-Mail: Publisher ID: 4

Comments:

Field Service Group: **Group #4 (Ramirez, Manuel)**

Update ☒ Active

Publishers List (14 publishers)

Id	Publisher
	Insert New Publisher
11	Abuki, Arnold
12	Anders, Ron
5	Anderson, Alfred
7	Gonzalez, Alby
6	Gonzalez, Maria
13	Landers, Beth
3	McDonald, Ronald
9	Petales, Betulia
4	Ramirez, Manuel
10	Robins, Peter
14	Rodgers, Donald
2	Rodriguez, Albert
1	Smith, Robert
8	Valenzuela, Rodolfo

Now proceed to assign the territories to the publishers by using the check-out button from the "Territories" tab:

Territory Organizer

File Territories Admin Help

Territories Homes Publishers Field Service Groups Reports Map Print Options

Update Existing Territory

Territory Number: 7

Description: Territory 7 Location:

Image:

City: State: ZipCode:

Comments:

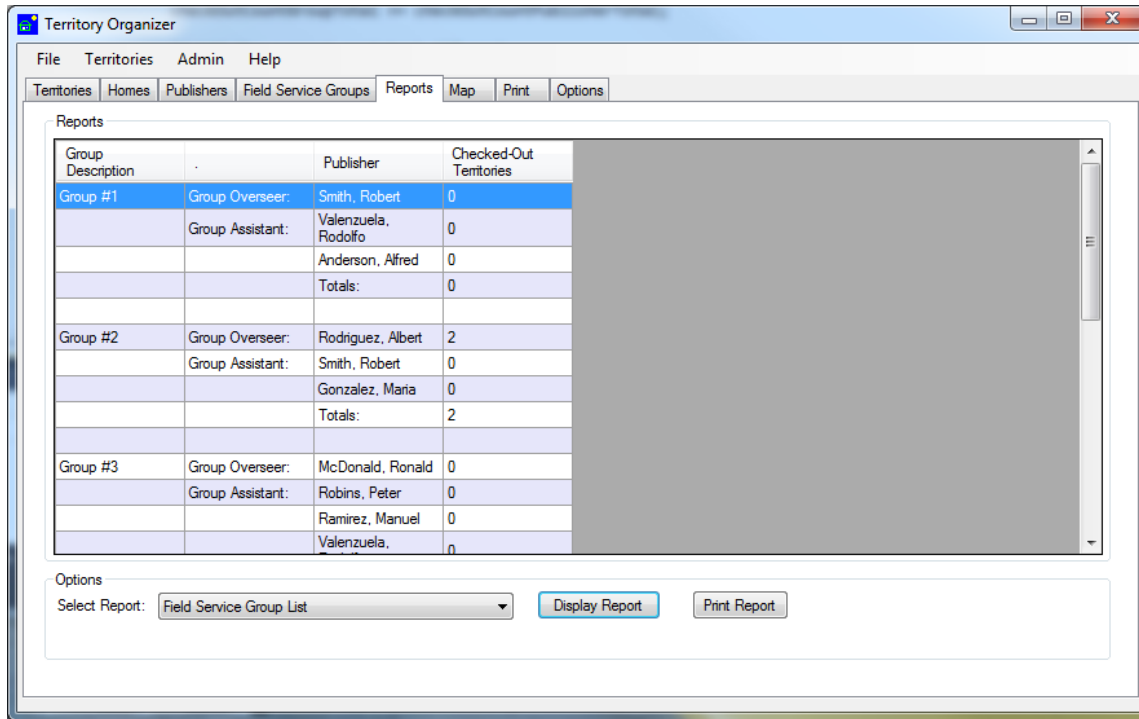
Update Check-Out Work History ☒ Active

Territories List (7 territories)

Sort Order: Territory Number

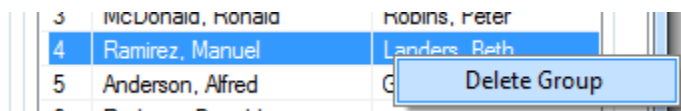
TerNum	Description	Check-Out Info
	Insert New Territory	
1	Territory 1	Territory was checked-c
2	Territory 2	Territory was checked-c
3	Territory 3	Territory was checked b
4	Territory 4	Territory was checked b
5	Territory 5	Territory was checked b
6	Territory 6	Territory was checked-c
7	Territory 7	Territory has never bee

You can now run reports to see a list of field service groups and the amount of territories assigned to each Field Service Group. To do this, click on the “Reports” tab, select the “Field Service Group List” report and then click on “Display Report”:



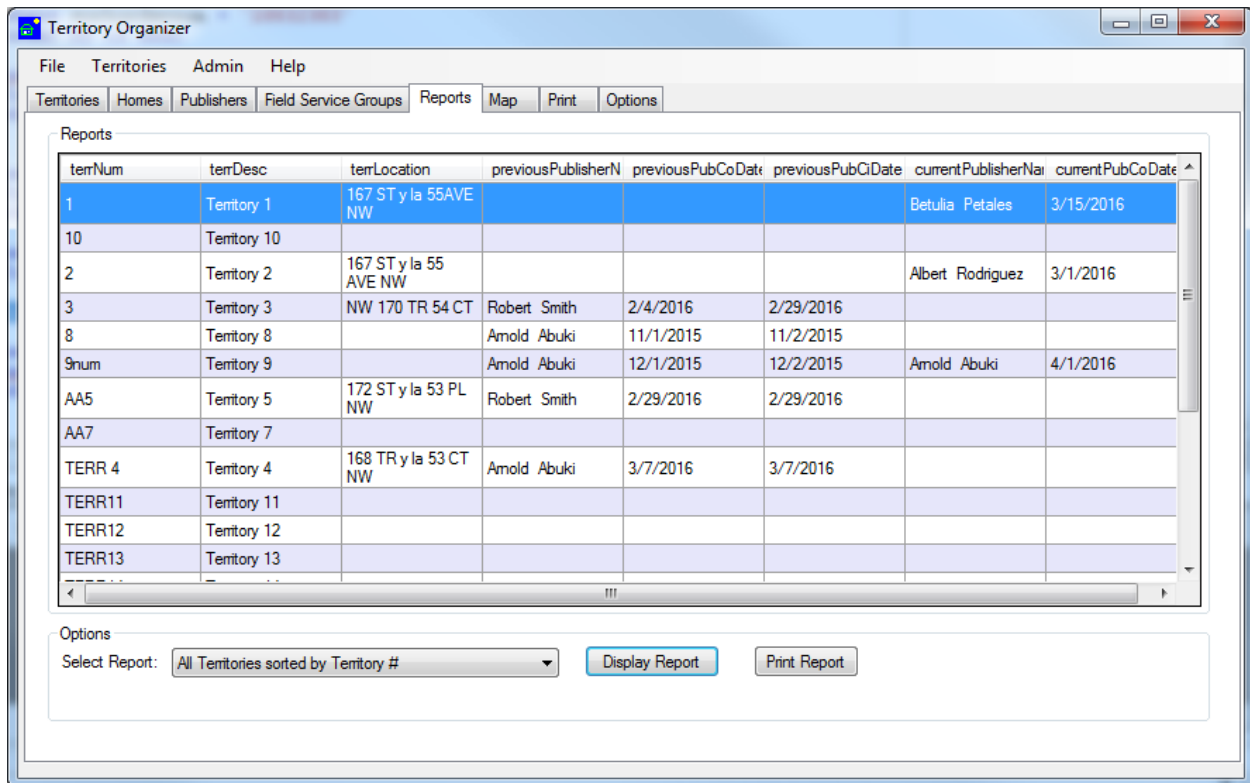
Permanently deleting a Group

To permanently delete a group, first go to the “Field Service Groups” tab. Then from the “Field Service Groups” List on the right side, right click on the Group and select “Delete Group”, confirm that you would like to delete the Group by clicking on “Yes”. Note: Once a Group is deleted, all its data is removed. Also, there is no method to bring back the Group once it has been deleted.



Reports

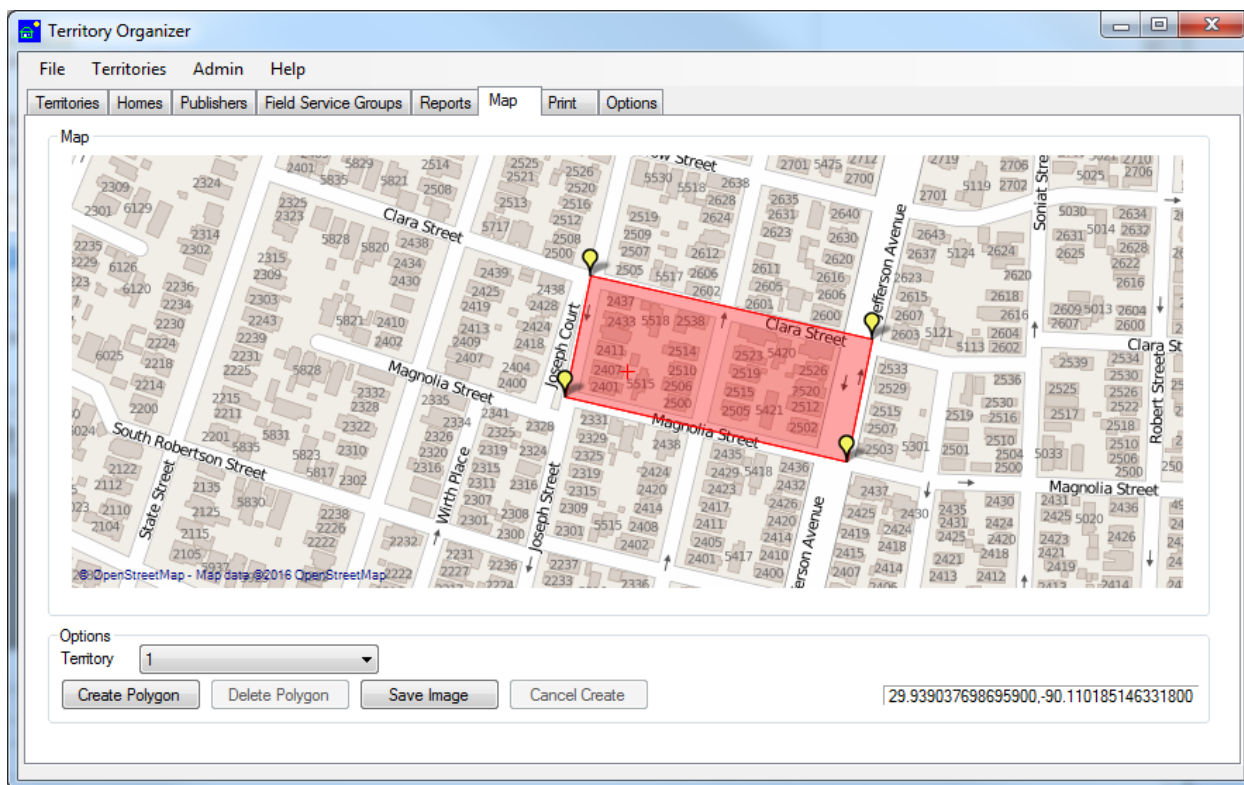
The reports tab allows you to run various reports and print them out:



Map

Description

The map tab will allow you to create a map of each territory which can be printed out with the territory.



How to zoom

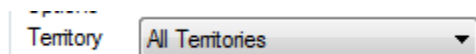
Use your mouse wheel to zoom in and out of the map.

How to mark the Territory borders

Use the "Create Polygon" button to create a border for each territory. Single click on each corner of the territory. Once you are at the last corner, double click to create the territory border.

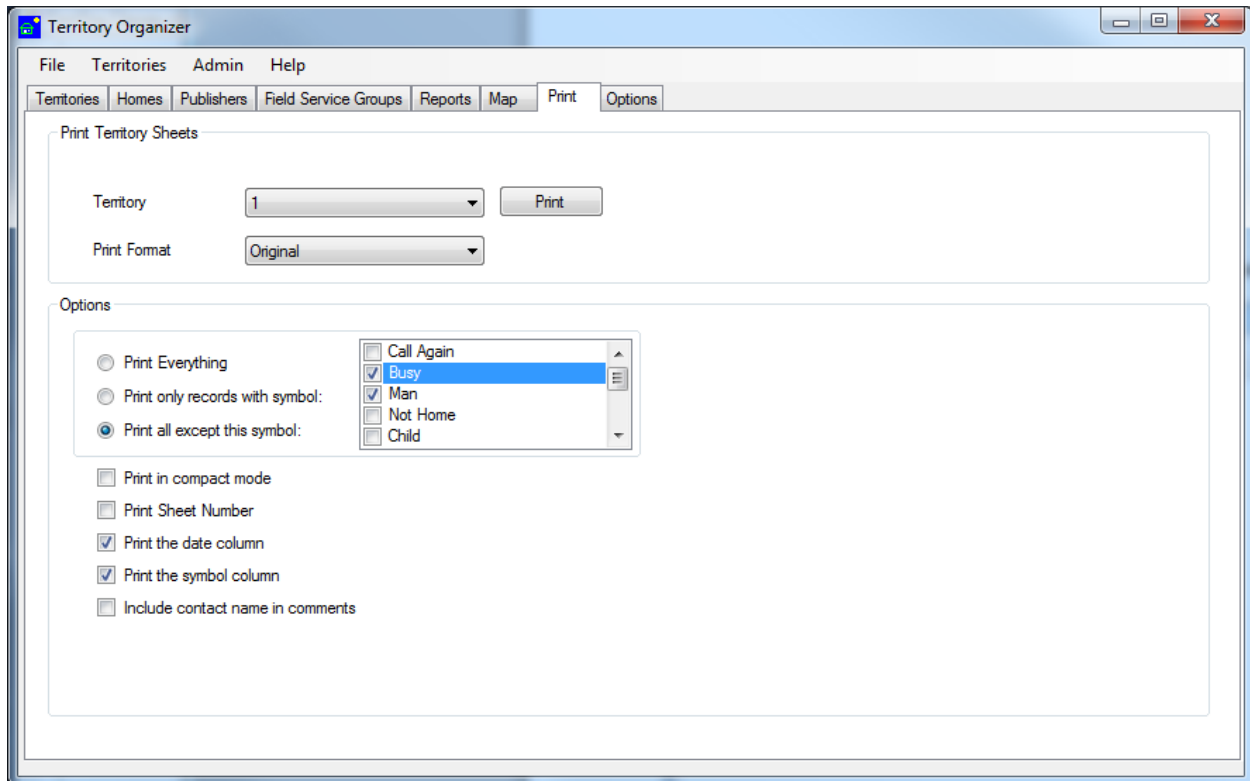
Displaying all territories

You can show all territories on the map by selecting the "All Territories" option from the territory dropdown box:



Print

The print tab allows the printing of the territory and map on the house to house sheets:



Territory

This option allows selection of the territory

Print Format

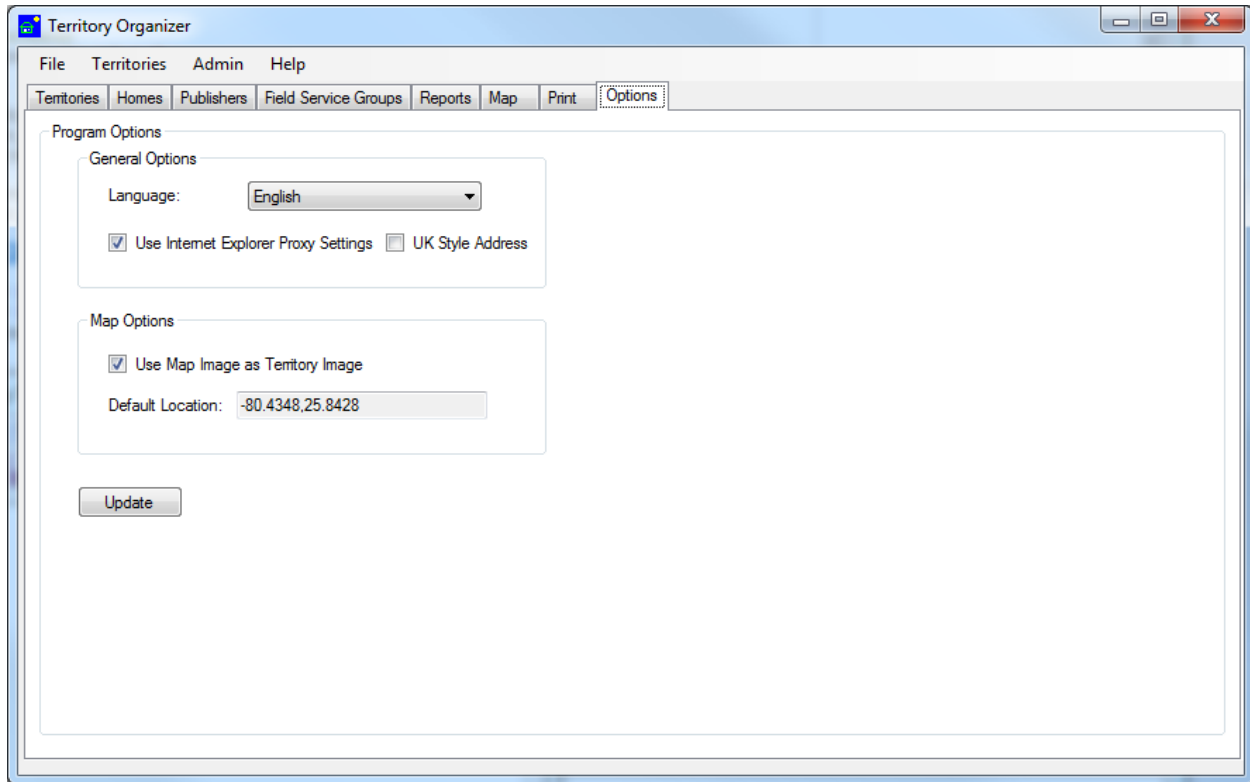
This selects the type of document to be printed. "Original" is the normal house-to-house sheet. If you require a custom format, contact the software developer.

Options

The options set various settings such as printing everything or only certain symbols. The territory can also be printed in Compact Mode to reduce paper. The "Print Sheet Number" allows printing of the sheet number on each sheet. The "Print Date Column" and "Print Symbol Columns" allow printing or hiding of this particular data during the print operation. The "Include contact name in comments" will include the contact name for each house in the comments column.

Options

The options tab allows selection of language and other features:



Symbols

The standard symbols on the house-to-house sheet are:

CA = Call Again

B = Busy

M = Man

NH = Not Home

C = Child

W = Woman

In addition to those above, you can add your own custom symbol to mark each house. Symbols that can be added for example:

Letter

Phone

Bad Dog

To add a new Symbol, click on the menu bar option "Admin", then select "Symbols". Once you setup a "Letter" symbol for example, it will then be available in the homes tab to mark a house with the new symbol. Then you can run the homes report from the report tab to print out just the homes that are marked with the "Letter" symbol for example to create a list for writing letters.

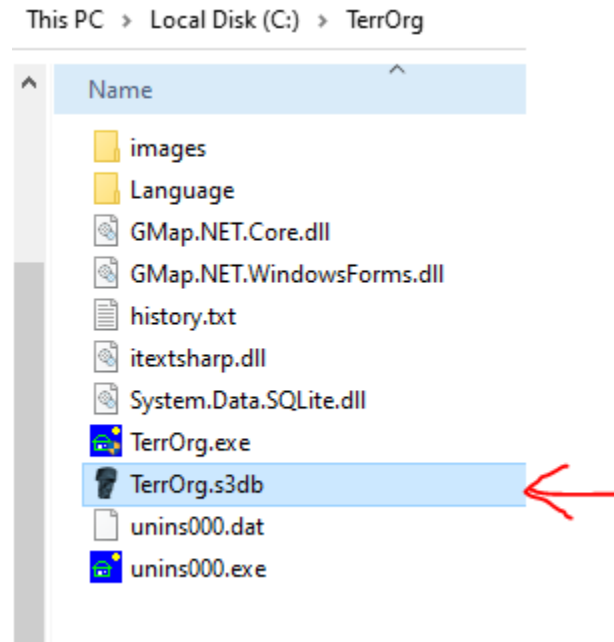
Note: After adding a new symbol, close and restart the program in order for the new symbol to be available for use.

Data Backup

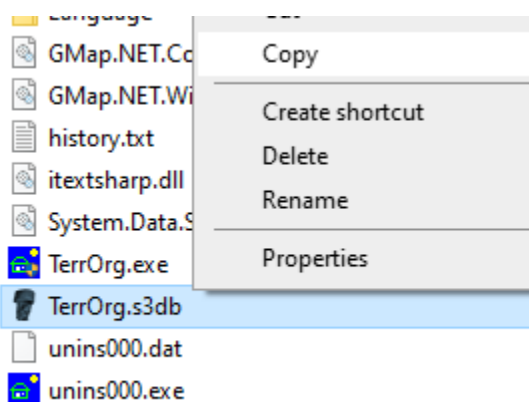
It is very important to backup your territory data. One way to backup your data is to save it to a flash drive monthly. The file to backup is called ***TerrOrg.s3db***.

Steps to perform the backup.

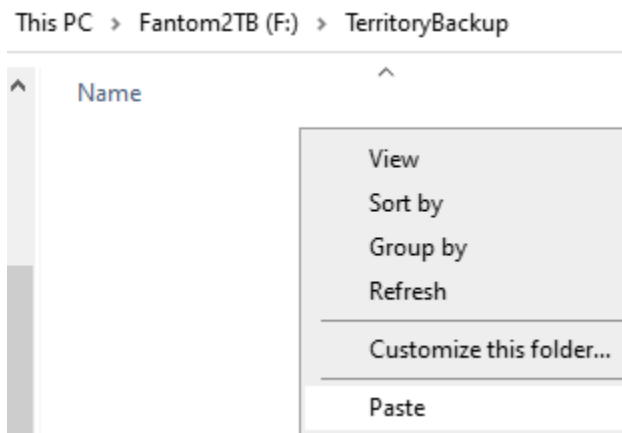
1. Open Windows Explorer and open the Territory Organizer Installation Folder. Usually its ***C:\TerrOrg*** unless it was changed during installation:



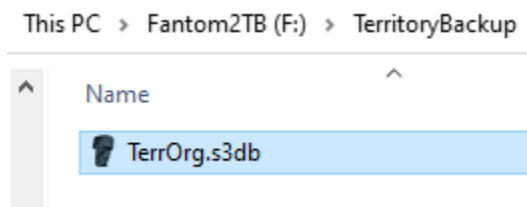
2. Copy the following file: (***TerrOrg.s3db***) **Note: Do not select Cut!**



3. Paste the file to a folder in your flash drive:



4. The file is now backed up in your flash drive:



If your computer fails, now you can just download the Territory Organizer program again, install the program again and then copy the file from your flash drive (TerrOrg.s3db) to the installation folder (Normally its C:\TerrOrg). This will overwrite the existing blank file with all your backed up data.

Territory Organizer Home Page:

<http://southfloridaguide.com/territory.htm>