Territory Organizer – User Manual v1.1

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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":

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:

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:

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.
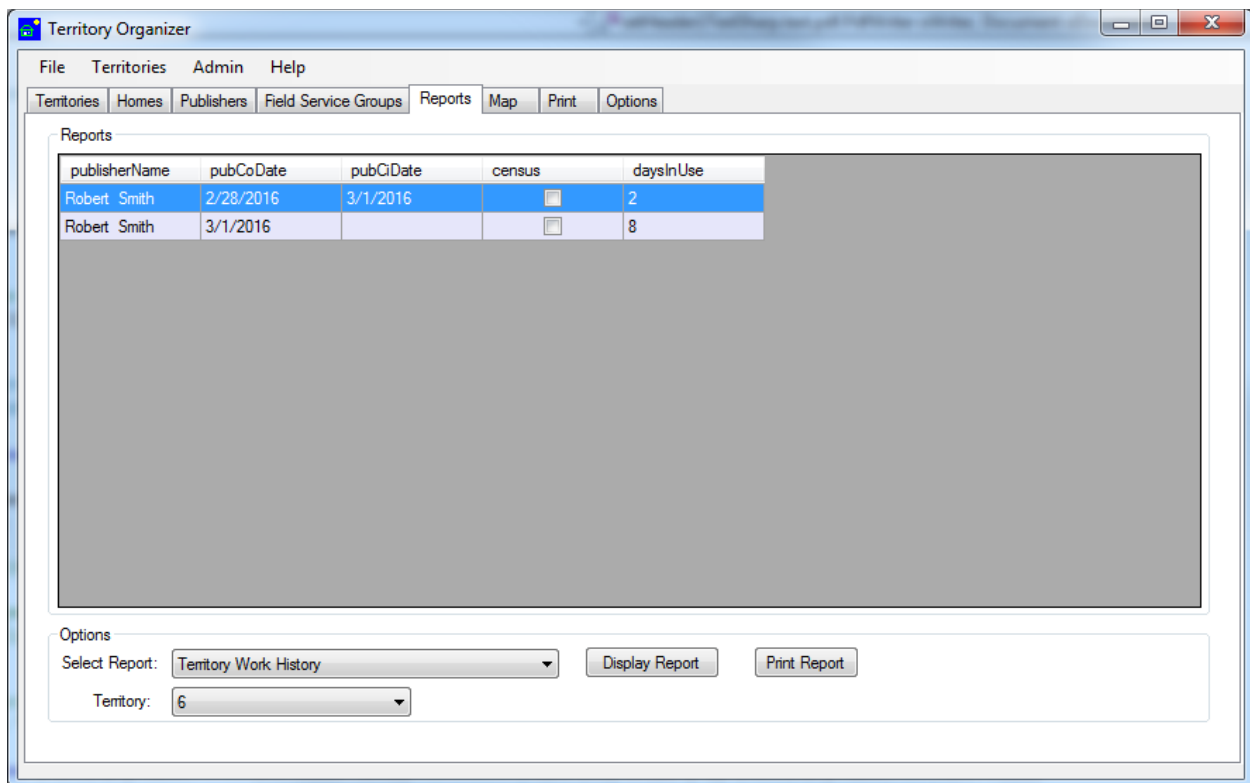
Deleting the work history

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:

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.

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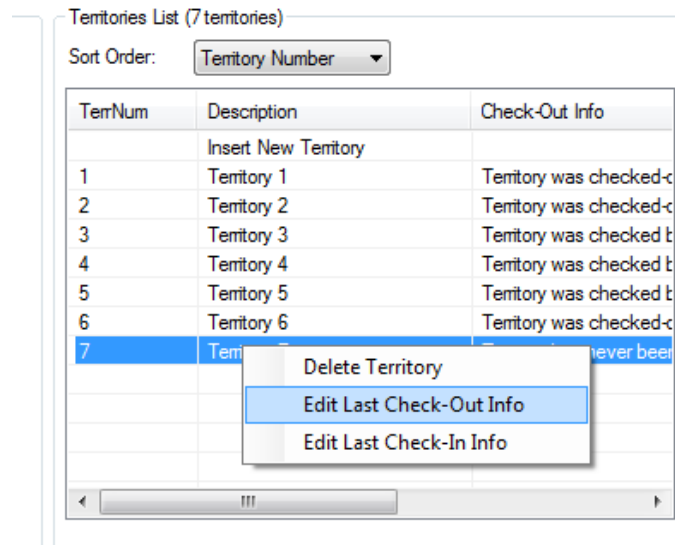
It is possible to edit the last Check-Out\Check-In info for a Territory. First go to the Territories tab. Then from the Territories List on the right side, right click on the Territory and select either "Edit Last Check-Out Info" or "Edit Last Check-In Info". Note: It is only possible to edit the last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

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":

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.
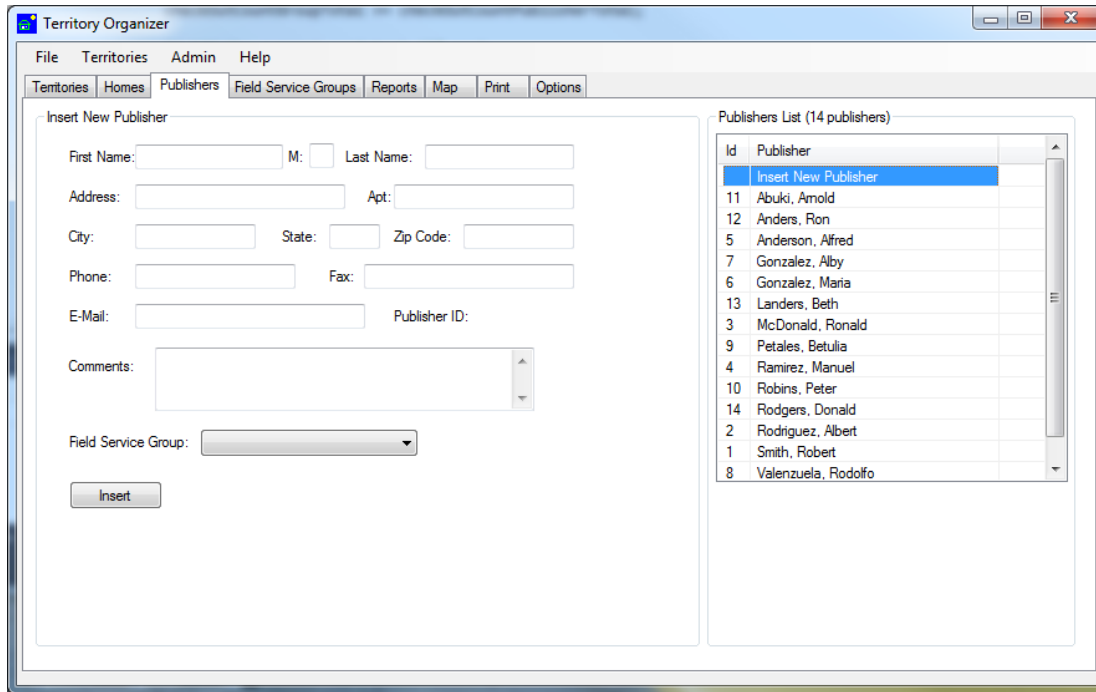
Permanently deleting a Publisher

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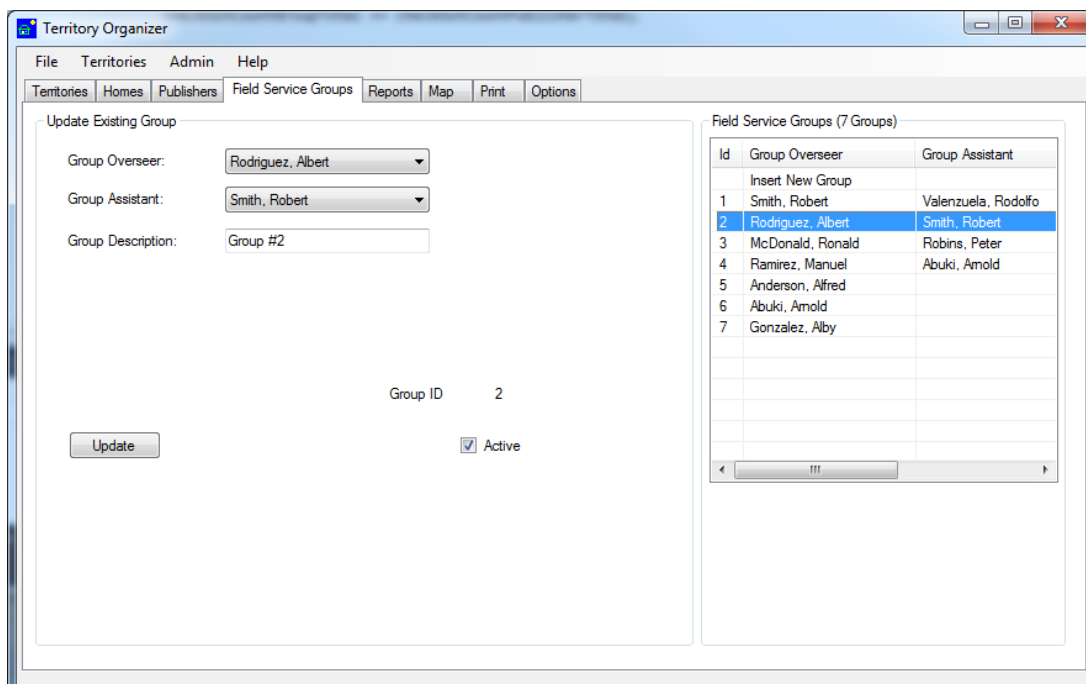
Then create all the field service groups from the "Field Service Groups" tab. Type in a description of the group such as "Group #1". Then select the Group overseer and optionally select the assistant:

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

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

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":
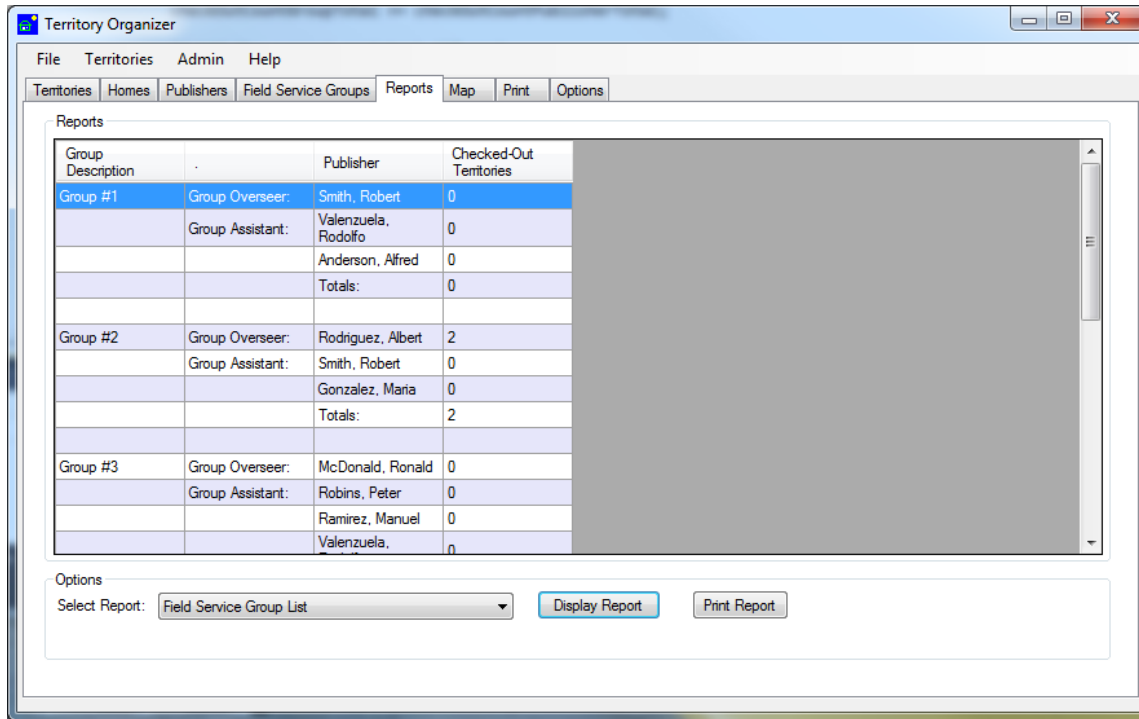
Permanently deleting a Group

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.
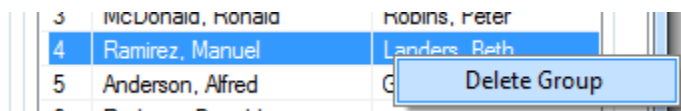
Reports

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

Territory Organizer

File   Territories   Admin   Help

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

Reports

terrNum	terrDesc	terrLocation	previousPublisherN	previousPubCoDate	previousPubCiDate	currentPublisherNa	currentPubCoDate
1	Territory 1	167 ST y la 55AVE NW				Betulia Petales	3/15/2016
10	Territory 10						
2	Territory 2	167 ST y la 55 AVE NW				Albert Rodriguez	3/1/2016
3	Territory 3	NW 170 TR 54 CT	Robert Smith	2/4/2016	2/29/2016		
8	Territory 8		Arnold Abuki	11/1/2015	11/2/2015		
9num	Territory 9		Arnold Abuki	12/1/2015	12/2/2015	Arnold Abuki	4/1/2016
AA5	Territory 5	172 ST y la 53 PL NW	Robert Smith	2/29/2016	2/29/2016		
AA7	Territory 7						
TERR 4	Territory 4	168 TR y la 53 CT NW	Arnold Abuki	3/7/2016	3/7/2016		
TERR11	Territory 11						
TERR12	Territory 12						
TERR13	Territory 13						

Options

Select Report: [All Territories sorted by Territory # ▼]   [Display Report]   [Print Report]

Map

Description

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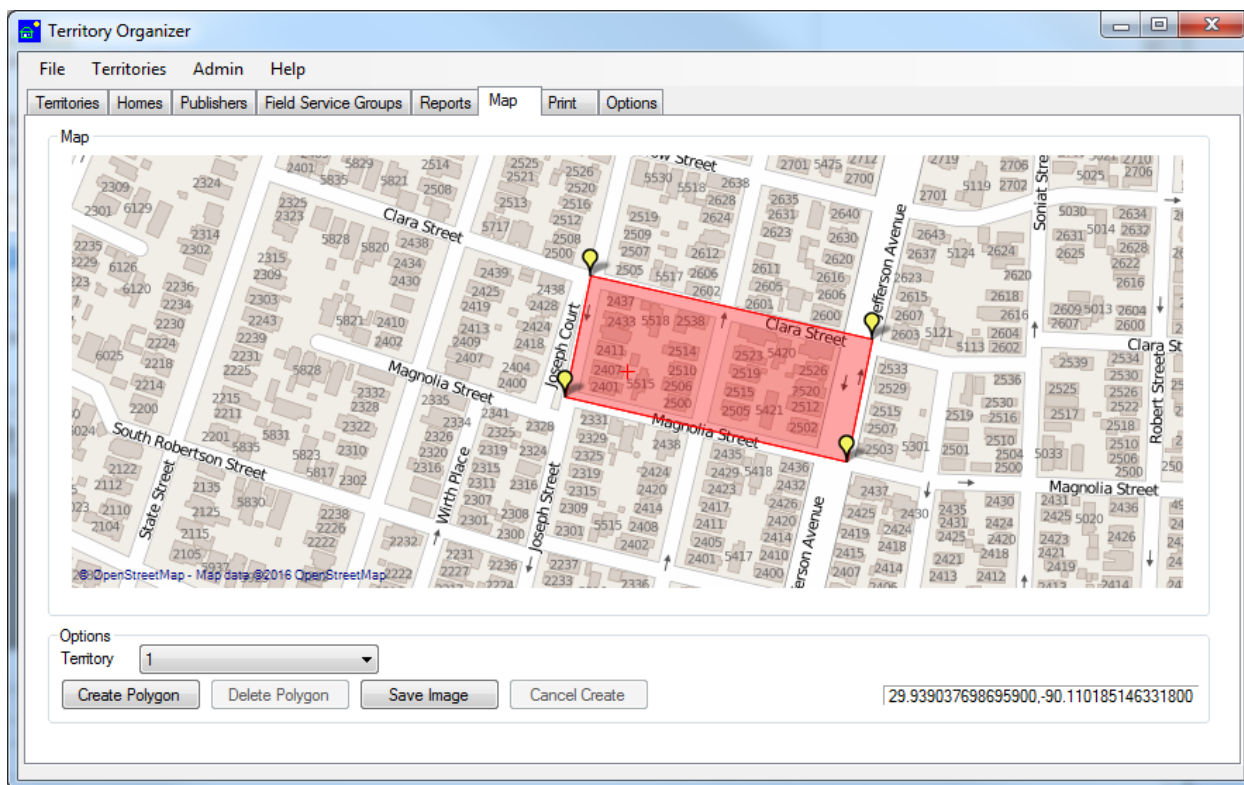
How to zoom

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:
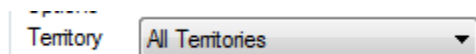
Print

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

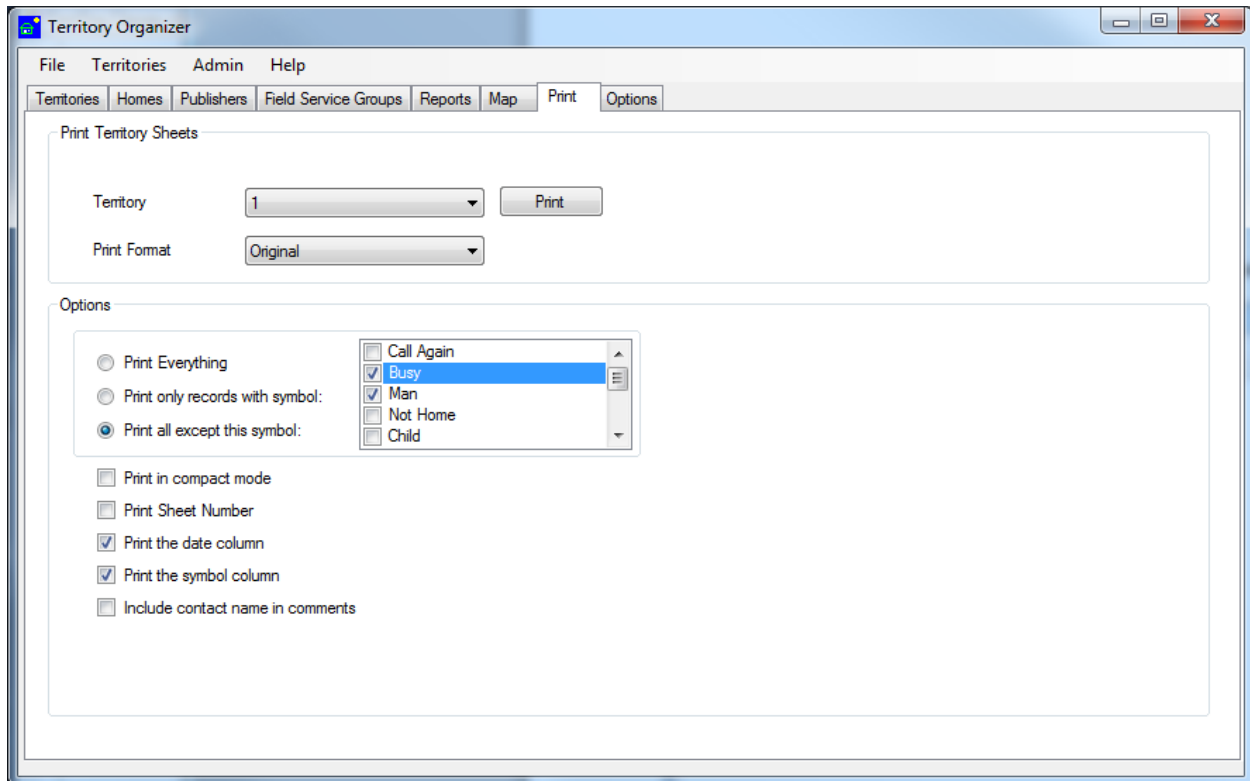

Territory

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:
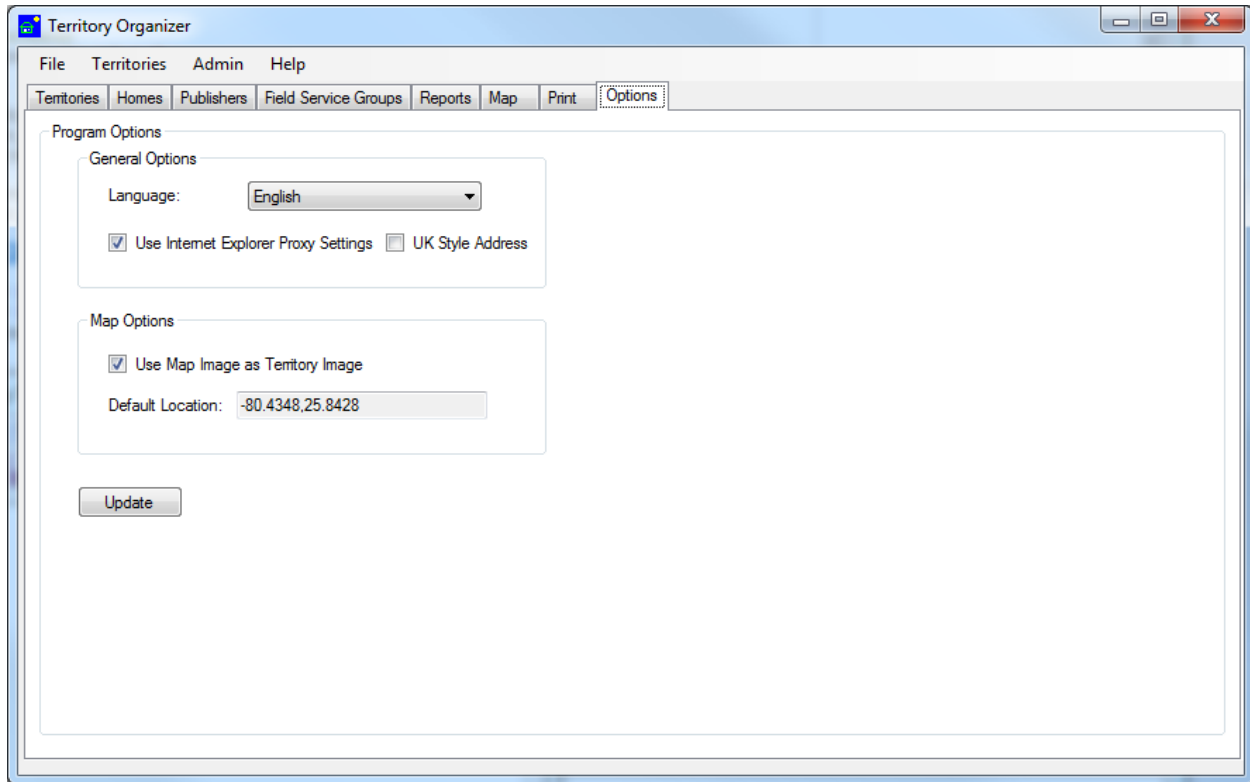
Symbols

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.
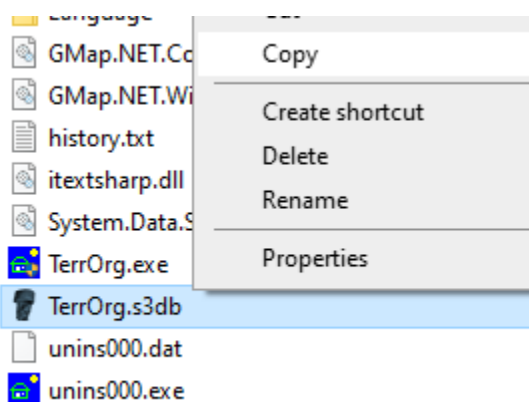
Data Backup

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**.
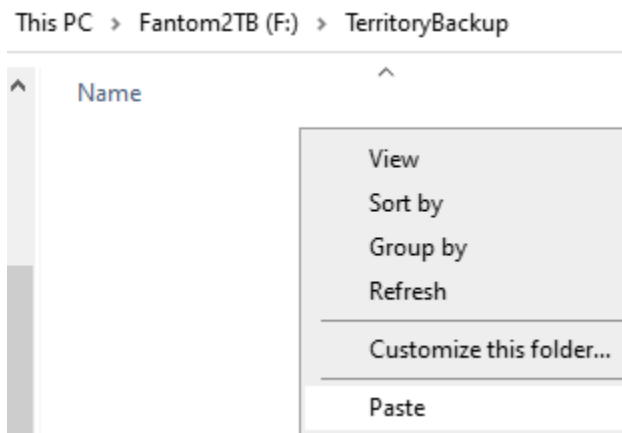
Steps to perform the backup.

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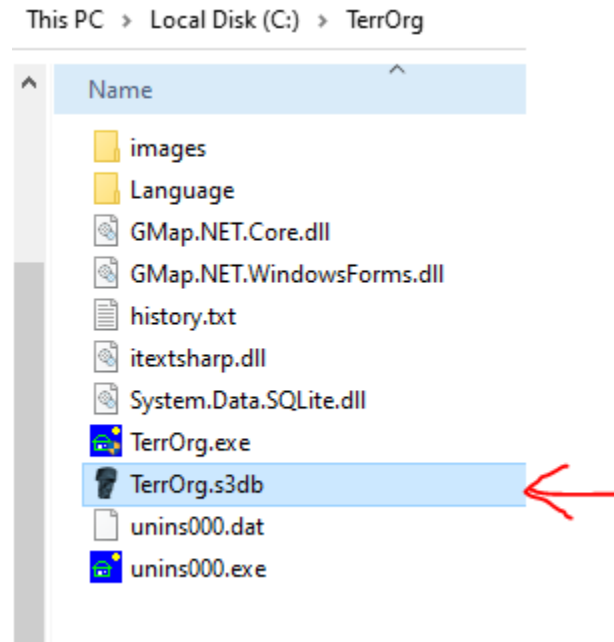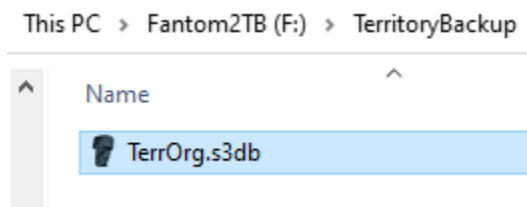

2. Copy the following file: (**TerrOrg.s3db**) **Note: Do not select Cut**!

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

This PC > Fantom2TB (F:) > TerritoryBackup

Name

View
Sort by
Group by
Refresh

Customize this folder...

Paste

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

This PC > Fantom2TB (F:) > TerritoryBackup

Name

TerrOrg.s3db

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