

How to Add a Territory

- 1. Open a Salesperson screen (refer to [How to Open Salesperson record](#)).
- 2. On **Salesperson** tab, click the **Territory** hyperlink. If the Territory field is not blank, the button will open the Territory record assigned to the salesperson. However, if the field is blank, it will open a new Territory screen.

Entity - Jared Smith

New Save Search Refresh Delete Undo Additional Close

Entity

General

Salesperson

Comments (0)

Attachments (0)

Messages

Custom

Au

Type:

Sales Representative

Date Hired:

6/14/2004

Birth Date:

1/2/1978

Gender:

Male

Territory

Marital Status:

Single

Spouse:

Active:

☒

- 3. Enter the **Territory** name. This field is required.
- 4. Select the **State**, **Start Zip**, and **End Zip** covered by this Territory. You can add multiple State and Zip Codes in the grid details.

Territory - OHIO

New Save Delete Undo Close

Details

Territory:

OHIO

X Remove

Layout

Filter Records (F3)

<input type="checkbox"/> State	Start Zip	End Zip
<input type="checkbox"/> OH	43001	43321
<input type="checkbox"/>		

- 5. **Save** the changes once done.
- 6. **Close** the Territory screen.
- 7. The new Territory will now be available on the **Territory** combo list box.

- 1. Open a Salesperson screen (refer to [How to Open Salesperson record](#)).

2. On **Salesperson** tab, click the **Territory** button. If the Territory field is not blank, the button will open the Territory record assigned to the salesperson. However, if the field is blank, it will open a new Territory screen.

Entity - Jared Smith

New Save Search Refresh Delete Undo Additional ▾ Close

Entity **Salesperson** Comments (0) Attachments (0) Custom Audit Log (2)

Type: Sales Representative ▾

Date Hired: 06/14/2004

Birth Date: 01/02/1978

Gender: Male ▾

Territory:

Marital Status: Single ▾

Spouse:

Active: ☒

3. Enter the **Territory** name. This field is required.
4. Select the **State**, **Start Zip**, and **End Zip** covered by this Territory. You can add multiple State and Zip Codes in the grid details.

Territory - OHIO

New Save Delete Undo Close

Details

Territory: OHIO

Layout Filter Records (F3)

<input type="checkbox"/> State	Start Zip	End Zip
<input type="checkbox"/> OH	43001	43321
<input type="checkbox"/>		

5. **Save** the changes once done.
6. **Close** the Territory screen.
7. The new Territory will now be available on the **Territory** combo list box.

Entity - Jared Smith

New Save Search Refresh Delete Undo Additional ▾ Close

Entity **Salesperson** Comments (0) Attachments (0) Custom Audit Log (2)

Type: Sales Representative ▾

Date Hired: 06/14/2004

Birth Date: 01/02/1978

Gender: Male ▾

Territory:

Marital Status: Territory ▾

Spouse: **OHIO**

Active: ☒

1. Open a Salesperson screen (refer to [How to Open Salesperson record](#)).

2. On **Salesperson** tab, click the **Territory magnifying button**. If the Territory field is not blank, the button will open the Territory record assigned to the salesperson. However, if the field is blank, it will open a new Territory screen.

Entity - Jared Smith

New Save Search Refresh Undo Additional Close

Entity **Salesperson** Notes Attachments

Date Hired: 06/14/2004 Dispatch

Birth Date: 01/02/1978 Notification:

Gender: Male Message:

Territory: [Magnifying Glass Icon]

Marital Status: Single

Spouse:

3. Enter the **Territory** name. This field is required.
4. Select the **State**, **Start Zip**, and **End Zip** covered by this Territory. You can add multiple State and Zip Codes in the grid details.

Territory - OHIO

New Save Search Delete Undo Close

Territory: OHIO

Remove Layout Filter Records (F3)

State	Start Zip	End Zip
OH	43001	43321

5. **Save** the changes once done.
6. **Close** the Territory screen.
7. The new Territory will now be available on the **Territory combo list box**.

Entity - Jared Smith

New Save Search Refresh Undo Additional Close

Entity **Salesperson** Notes Attachments

Date Hired: 06/14/2004 Dispatch

Birth Date: 01/02/1978 Notification:

Gender: Male Message:

Territory: OHIO

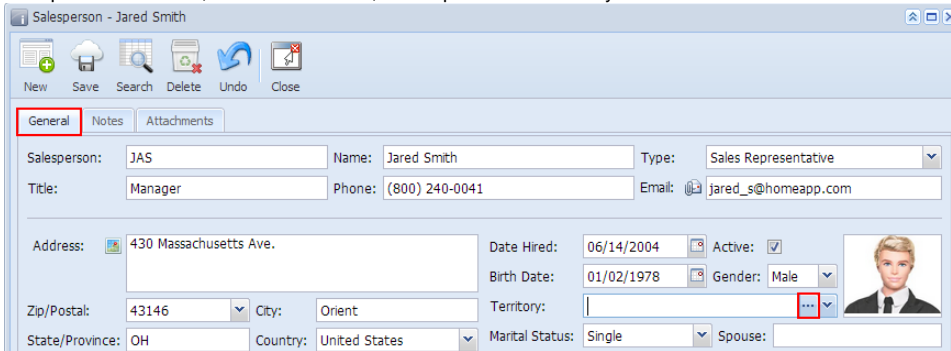
Marital Status: Single

Spouse:

Active: ☒

1. Open a Salesperson screen (refer to [How to Open Salesperson record](#)).

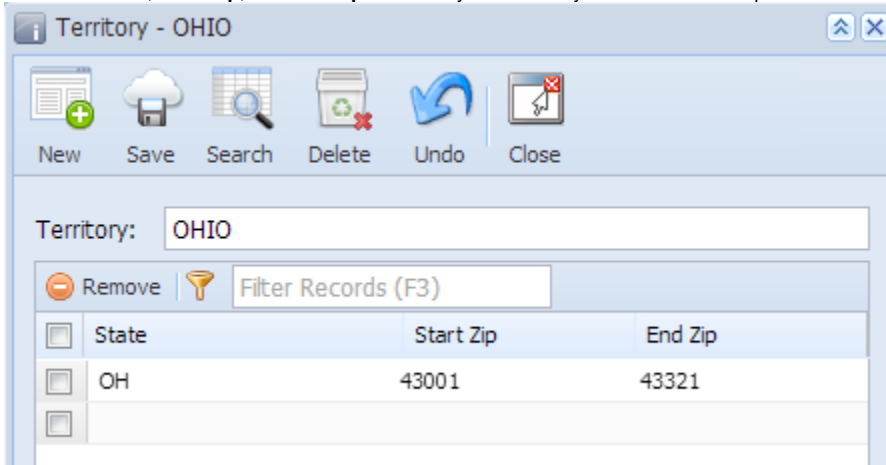
2. On **Detail tab**, click the **Territory ellipsis button**. If the Territory field is not blank, the button will open the Territory record assigned to the salesperson. However, if the field is blank, it will open a new Territory screen.



The screenshot shows the 'Salesperson - Jared Smith' form. The 'General' tab is selected. The 'Territory' field is empty, and the ellipsis button next to it is highlighted with a red box. The form contains the following data:

Field	Value
Salesperson:	JAS
Name:	Jared Smith
Type:	Sales Representative
Title:	Manager
Phone:	(800) 240-0041
Email:	jared_s@homeapp.com
Address:	430 Massachusetts Ave.
Date Hired:	06/14/2004
Active:	<input checked="" type="checkbox"/>
Birth Date:	01/02/1978
Gender:	Male
Zip/Postal:	43146
City:	Orient
State/Province:	OH
Country:	United States
Marital Status:	Single
Spouse:	

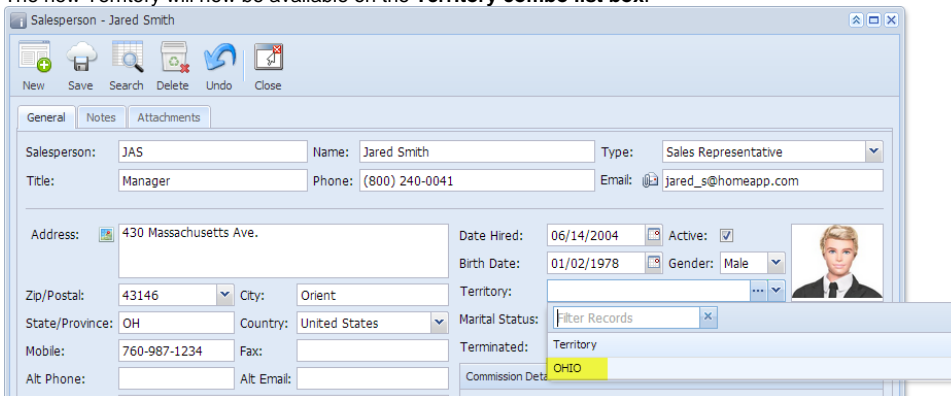
3. Enter the **Territory** name. This field is required.
4. Select the **State**, **Start Zip**, and **End Zip** covered by this Territory. You can add multiple State and Zip Codes in the grid details.



The screenshot shows the 'Territory - OHIO' form. The 'Territory' field is set to 'OHIO'. Below the field is a table with columns 'State', 'Start Zip', and 'End Zip'. The table contains one row with the following data:

State	Start Zip	End Zip
OH	43001	43321

5. **Save** the changes once done.
6. **Close** the Territory screen.
7. The new Territory will now be available on the **Territory combo list box**.



The screenshot shows the 'Salesperson - Jared Smith' form again. The 'Territory' field is now populated with 'OHIO'. A dropdown menu is open, showing the 'Territory' field with 'OHIO' selected. The form contains the following data:

Field	Value
Salesperson:	JAS
Name:	Jared Smith
Type:	Sales Representative
Title:	Manager
Phone:	(800) 240-0041
Email:	jared_s@homeapp.com
Address:	430 Massachusetts Ave.
Date Hired:	06/14/2004
Active:	<input checked="" type="checkbox"/>
Birth Date:	01/02/1978
Gender:	Male
Zip/Postal:	43146
City:	Orient
State/Province:	OH
Country:	United States
Marital Status:	Single
Spouse:	
Mobile:	760-987-1234
Fax:	
Alt Phone:	
Alt Email:	