TerrAlign

Appexchange

About TerrAlign

TerrAlign for AppExchange is the only solution that delivers market leading territory alignment capabilities tightly integrated with the On-Demand sales automation solution of choice. With this combination, companies can optimize their sales resources by designing the most efficient territories and simultaneously manage account ownership in Salesforce.

TerrAlign solutions enable organizations to optimize and manage the deployment of sales resources. Users can visualize and analyze data to design profitable territories, using TerrAlign's cutting-edge mapping, optimization, and realignment features. With direct access through Salesforce, field managers can evaluate territory configurations and update account or geography assignments. Companies that implement TerrAlign solutions report increased revenue, market share and profits, lower costs, decreased field force turnover, and more manageable territories.

Key Features

Name	Description
Territory Optimizer	TerrAlign puts the power of automated optimization in the hands of the Sales Operations user. Optimize hundreds of territories in minutes with real-world results. Balance territories on user-defined business metrics. Design territories according to drive time and geography. Vary the level of disruption allowed between current and new territory configurations.
Realignment functions	Override territory assignments by geographic unit or account. Evaluate each decision with detailed information. Update summary data after each reassignment.
Travel Time Estimator	Estimate average travel times or distances for each account based on account location, call frequencies and possible routes.
Field Access	Empower field managers to review and modify territories, and automatically update Salesforce.com account information for their reps.

Benefits

- Automatically optimize assignments of accounts or geography to meet business needs and maximize sales resources
- Minimize travel costs and increase selling time by reducing over all driving requirements
- Improve morale and reduce turnover by designing territories with equivalent opportunities
- Communicate territory configurations to the field with maps and reports within Salesforce.com
- View and modify alignments within Salesforce.com

Reports & Dashboards

Name	Description
Summary Report	Data aggregated by territory or other level in the hierarchy. User determines fields to be displayed and format.
Assignment Report	Detailed list of accounts and geographic containers by territory. User determines fields to be displayed and format.
Gain/Loss Report	Detailed list of accounts and geographic containers that have been reassigned, by territory. User determines fields to be displayed and format.
Maps	Several types of alignment maps may be generated in hard copy or electronic format: individual territory, district, region or custom. Different geographic details may be displayed.

Requirements

Salesforce Edition Enterprise, Unlimited

Contact Info

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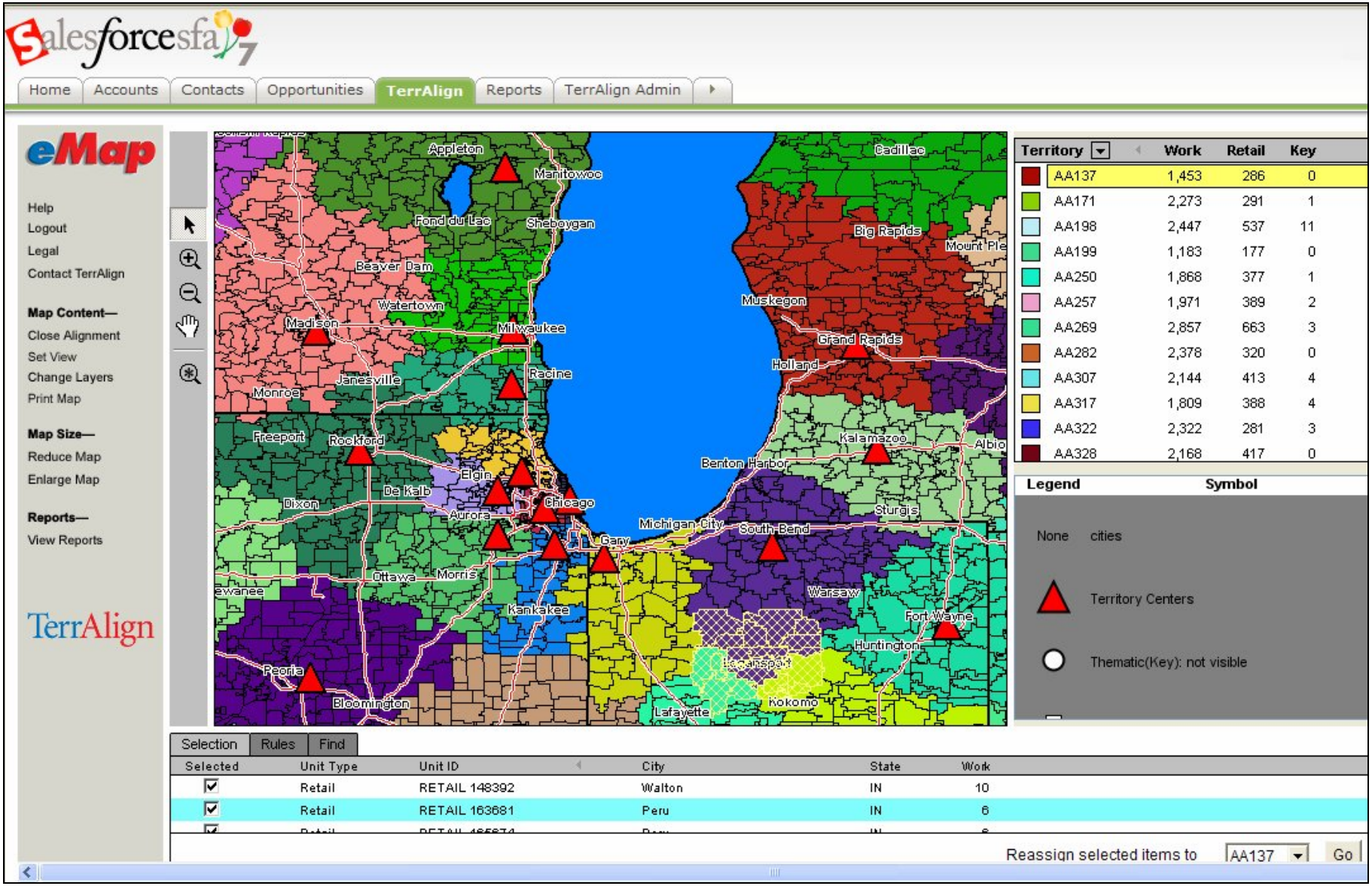
salesforce.com Success On Demand.

TerrAlign®

Screenshot


Salesforcesfa
Home
Accounts
Contacts
Opportunities
TerrAlign
Reports
TerrAlign Admin
eMap
Help
Logout
Legal
Contact TerrAlign
Map Content—
Close Alignment
Set View
Change Layers
Print Map
Map Size—
Reduce Map
Enlarge Map
Reports—
View Reports
TerrAlign
Territory
Work
Retail
Key
AA137 1,453 286 0
AA171 2,273 291 1
AA198 2,447 537 11
AA199 1,183 177 0
AA250 1,868 377 1
AA257 1,971 389 2
AA269 2,857 663 3
AA282 2,378 320 0
AA307 2,144 413 4
AA317 1,809 388 4
AA322 2,322 281 3
AA328 2,168 417 0
Legend
Symbol
None cities
Territory Centers
Thematic(Key): not visible
Appleton
Manitowoc
Sheboygan
Fond du Lac
Beaver Dam
Watertown
Madison
Milwaukee
Racine
Janesville
Monroe
Freeport
Rockford
Elgin
De Kalb
Dixon
Aurora
Chicago
Gary
Michigan City
South Bend
Ottawa
Morris
Kankakee
Peoria
Bloomington
Lafayette
Kokomo
Warsaw
Fort Wayne
Huntington
Benton Harbor
Kalamazoo
Sturgis
Albio
Muskegon
Grand Rapids
Holland
Big Rapids
Mount Ple
Cadillac
Selection
Rules
Find
Selected
Unit Type
Unit ID
City
State
Work
Retail RETAIL 148392 Walton IN 10
Retail RETAIL 163681 Peru IN 6
Reassign selected items to
AA137
Go