

VueWise Territory Maps

Quick Start Guide

Installation of the Program

VueWise Territory Maps is built on the Microsoft .net framework and requires both .Net Framework 3.5 Service Pack 1 and MS SQL Compact. As part of the installation process, the system is checked to determine if these products are available. If not, they will be automatically installed as part of the process. Manual installation of these product can be done by following these links:

.NET Framework 3.5 SP1:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en>

MS SQL Compact:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=DC614AEE-7E1C-4881-9C32-3A6CE53384D9&displaylang=en>

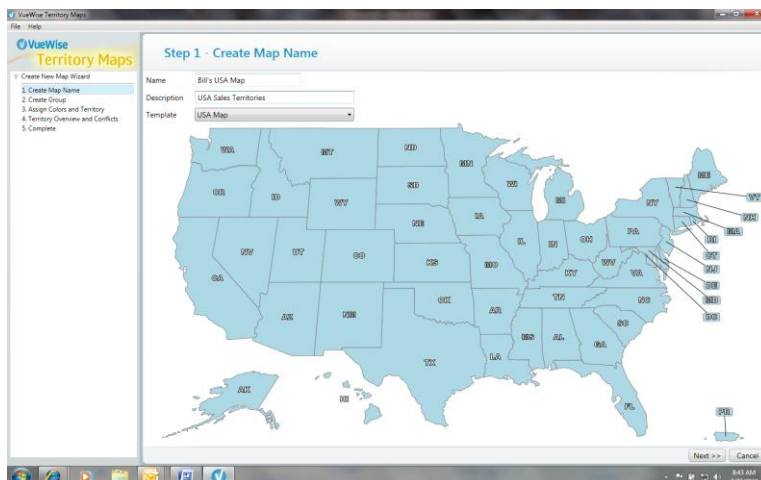
Activation Keys

Once VueWise Territory Maps is installed, you will need to input the activation key. When product is purchased from the VueWise store, the key is automatically inserted into the product and validated. Some customers have run into issues with this process. If you need to manually enter an authorization key, please request your key via email to sales@vuewise.com or you can contact our online store partner RegNow https://regnow.img.digitalriver.com/faq_order.html and use their online tool.

Creating a New Map

VueWise Territory Maps is designed to be a guided experience to help you be productive quickly. Simply click on Create New Map on the left side of the menu bar and you will enter the Create New Map Wizard.

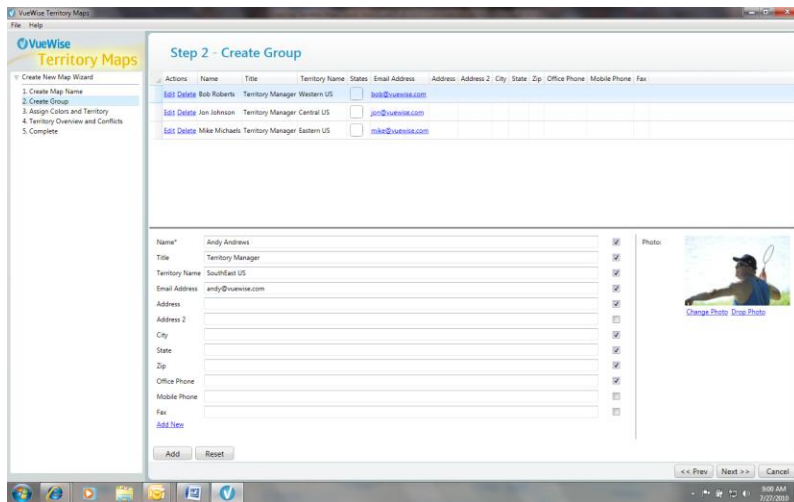
Step 1 is to create a map name and choose a map to use. In the example below, we have chosen the USA Map, named it Bill's USA Map and described it as USA Sales Territories. Clicking next will take you two Step 2.



Step 2 Create Group:

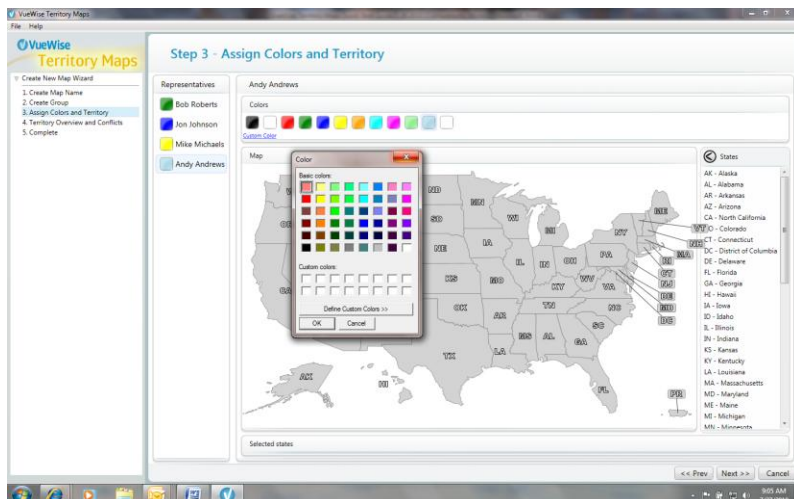
Create Group is the second step in the map creation process. It is here that we establish the information for a territory. If you are using VueWise Territory Maps for sales teams, this is where you will input your sales team members. Users who use VueWise Territory Maps to create maps for education, political parties, church affiliations, or other concepts can customize the data input at this stage.

As you can see below, not all information needs to be filled in. After inputting the details you wish to share, click on the Add button on the bottom left. This will move your data to the top half of the page which represents your group. If there is special information that you wish to add, click on the Add New hyperlink below the Fax field. This will allow you to customize any field. If you wish to show this data on the map, simply check the box on the right. To add a photo, click on change photo below the photo box and you will be able to browse your system and upload a photo. Once you have created your group, click Next at the bottom right to move to Step 3. Note, you must create a group with at least one member to move forward.

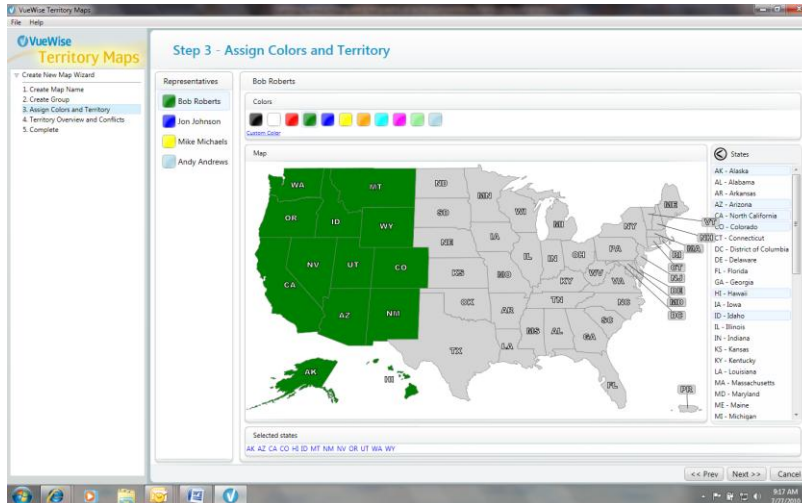


Step 3 Assign Colors and Territories:

This stage is where you will populate your map with your Group. Start off by assigning each group member a color. You can use the 12 colors from the quick pick list or use custom colors by clicking the blue hyperlink to see an expanded list.

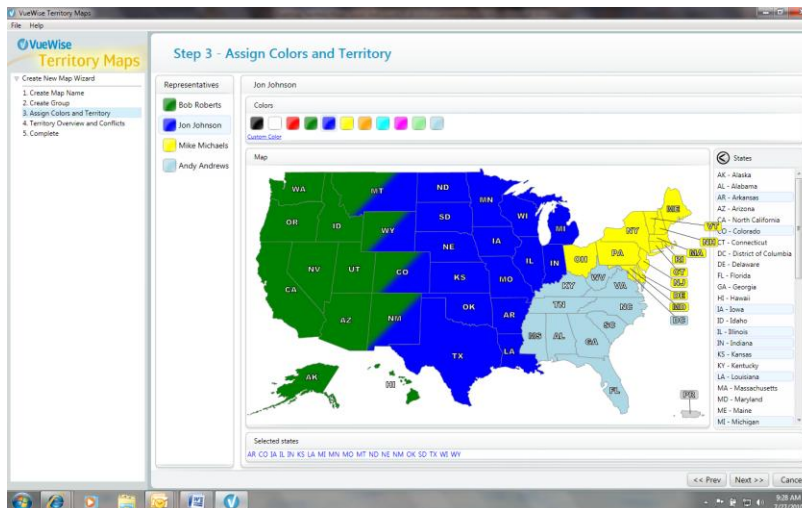


Next you will assign the states to your group of sales reps. Simply click on the rep who you are ready to assign a territory then click on the state you wish to assign. You can also assign a state from the state list on the right side of the screen.



Shared Territories.

You can assign a state to more than one territory and it will color code the state with multiple colors. In VueWise Territory Maps 2.0 we allow more customization of a Territory.



Step 4 Territory Overview and Conflicts:

At this stage, you are able to see the complete map and identify any overlaps in the territories. In this example, Montana, Wyoming, Colorado and New Mexico all have conflicts. You can either remove the conflict if it was an error or move to the next step if the overlapping territory was your intent.



Step 5 Complete:

Here you will see your completed map that includes the Legend for the map and a Territory Description when you click on a state. Once you click save, you are ready to print, export or modify.

