



Location Hub[®] Viewer: Territory Builder Module

Release Notes V2.2.2
07/14/2017

What's New...



New Features: 0
Big & Fancy New Features/Functionality



Improvements: 3
Enhancements to Current Functionality



Bug Fixes: 2
It was broken, so we fixed it!





Improvements

Summary:

1. Data Quality – Territory Builder Report (FSA)

What does it do?

In addition to the current reporting functionality that is available for databases with full postal code (FSALDU) territories, you can now generate a Territory Builder Report (pdf) when uploading an FSA territory file and understand how many FSAs were submitted, standardized and matched successfully. You will also be informed of how many FSAs are overlapping between territories.

Please see Image A and B.

How would I use It?

1. *Data quality concerns?* The Territory Builder Report should be used prior to “Editing” your territories in order to evaluate the quality of your database (FSAs) that were submitted to the module. You will also be able to identify whether or not your file contains invalid FSAs (*Image A*).
2. *Optimizing territory allocation?* You can now see how many FASs are assigned to more than one territory in order to confirm their validity.

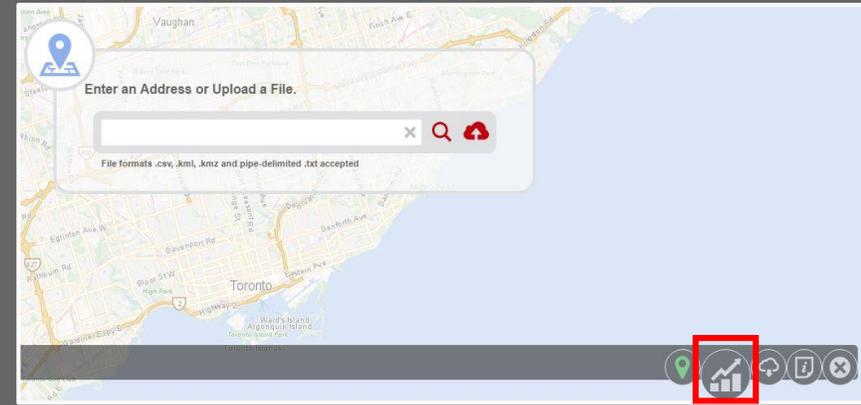


Image A: Territory Builder Report Button

Territory Builder Report (FSA)		2
Results summary		
File Name:		testaddresses.csv
Date Processed:		July 14, 2017 7:23:05 PM
Number of Records Submitted:		500
Input Assessment		
Exact match: Postal codes which are found within the postal code polygon (FSA) database		420
Invalid match: Postal Codes which are not found within Postal Code polygon (FSA) database		1
Standardized match: Postal codes which are found to not be formatted properly (i.e., missing characters from a standard FSA (XXX) postal code value)		0
Multiple Assignee: Postal codes which are found to be associated with more than one assignee and should be confirmed by user		79
Total Number of Records (exported):		500
NOTES: Postal codes (FSA) outside (or adjacent) to your territories may also be worthwhile to investigate within the mapping tool to help add or expand your territories.		
DMTI Spatial Inc. 30 Leek Crescent, Suite 202 Richmond Hill, ON L4B 4N4, CANADA 1-877-477-3684 Fax: 905-948-9404 www.dmtispatial.com		

Image B: Territory Builder Report (FSA)



Improvements

Summary:

2. New Territory File Output Columns - FSAs

What does it do?

Once your FSA territory file has been visualized/edited, you have the ability to download the file, and review two added fields

- **Status**
- **Last_Modified_Date**

- The “Status” field will display information related to the Territory Builder Report, as well as if a FSA is added to a territory or is reassigned to another. *Please see Table 1.*
- The “Last_Modified_Date” provides a date-stamp for each record that outlines the date of the last modification made to it. E.g., 28/02/2017 (D/M/Y)

How would I use it?

1. *Postal code quality issues?* Use the “Status” field to further understand the cleanliness of your postal code (FSA) data.
2. *Territory Management?* Understand the changes that were made and when these changes occurred after you’ve finished editing your territories.

Status Output Flags	
Name	Description
<i>Invalid</i>	<ul style="list-style-type: none"> • FSAs not found within DMTI’s FSA Database
<i>Standardized</i>	<ul style="list-style-type: none"> • FSAs which are found to not be formatted properly (e.g., swapping ‘0’ (number) for ‘O’ (letter))
<i>Overlap</i>	<ul style="list-style-type: none"> • FSAs which are found to be associated with more than one territory and should be confirmed by user
<i>Added</i>	<ul style="list-style-type: none"> • New FSAs that have been added to a territory
<i>Reassigned</i>	<ul style="list-style-type: none"> • FSAs that have been reassigned from one territory to another

Table 1: “Status” Flags



Improvements

Summary:

3. Moveable Territory Management Dialog Box

What does it do?

You now have the ability to move the Territory Management dialog box freely anywhere on your screen. This gives you the freedom to easily see where you would like to expand your territories.

How would I use it?

1. Enter edit mode by clicking  from the Layer Control menu.
2. Select a territory you would like to modify.
3. Click anywhere on the Territory Management dialog box, and reposition as you please (See Image C).

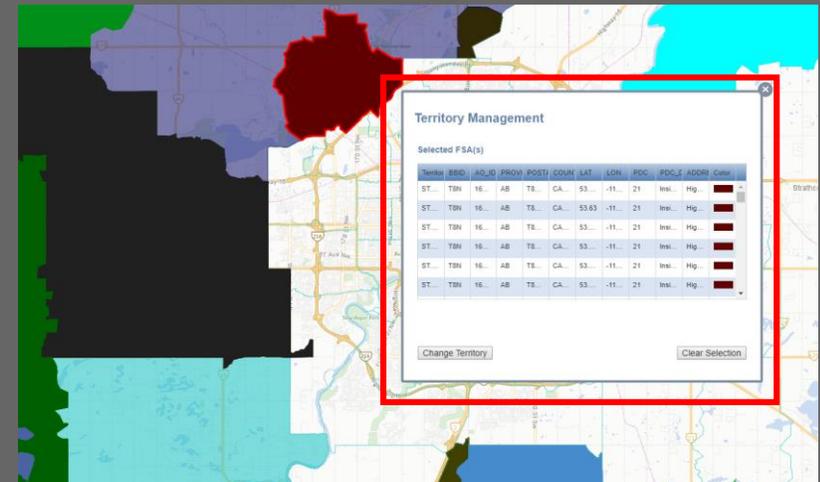


Image C: Moveable Territory Management dialog box



Bug Fixes

Summary:

1. Polygon Selection Issue

What did it do?

After clearing a polygon selection, it was not possible to immediately interact with the polygon (i.e. adding values, changing territory name).

What is the new outcome?

You are now able to interact with polygons immediately after clearing your selection.

2. Spaces in Header Impact Editing of Territories

What did it do?

When you uploaded a file within the Territory Builder module that possessed a header value with a space, any edits made to the territory could not be viewed immediately on the map.

What is the new outcome?

You are now able to edit territories that have spaces in their header values normally

