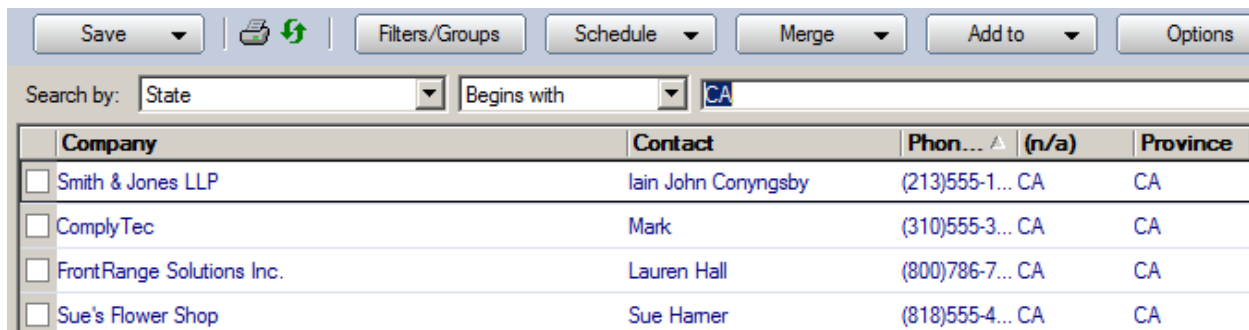


## How to: Use Territory Realignment

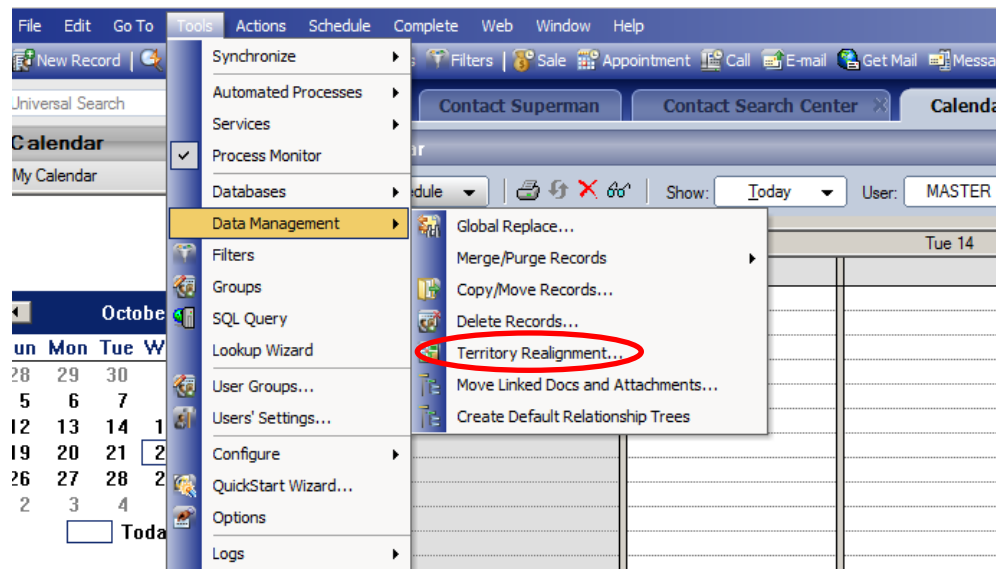
GoldMine has a powerful tool to take care of the often daunting task of reassigning activities and accounts when a company's internal structure changes. This tool is the *'territory realignment wizard'*. In this edition of TechTips we will teach you how to properly use the territory realignment field to reassign events, populate fields (like account manager), and reduce the headache of internal changes.

**Step 1:** In order to use the territory realignment function we suggest you first build a filter or group of the contacts you want to realign under the new user. Alternatively you can do the entire database.



Company	Contact	Phon... ^ (n/a)	Province
<input type="checkbox"/> Smith & Jones LLP	Iain John Conynsby	(213)555-1... CA	CA
<input type="checkbox"/> ComplyTec	Mark	(310)555-3... CA	CA
<input type="checkbox"/> FrontRange Solutions Inc.	Lauren Hall	(800)786-7... CA	CA
<input type="checkbox"/> Sue's Flower Shop	Sue Hamer	(818)555-4... CA	CA

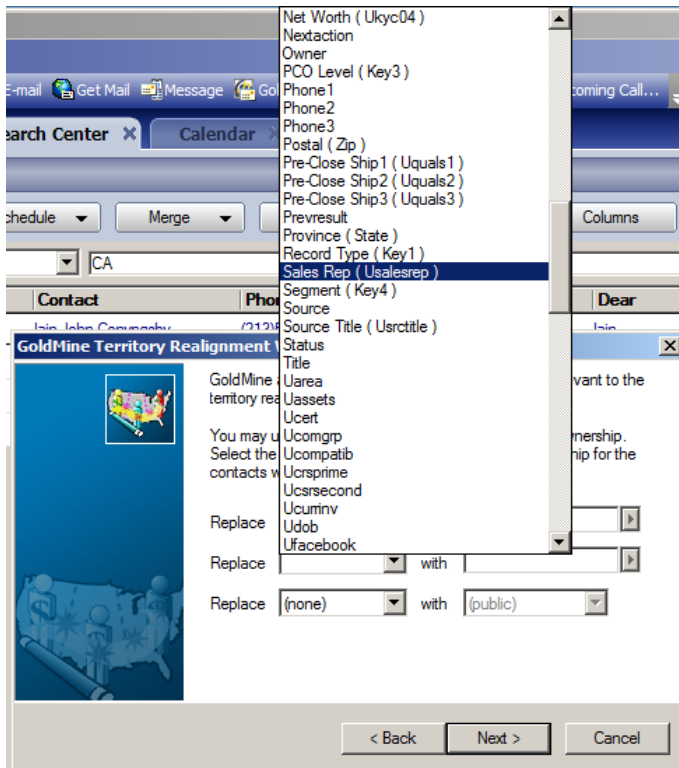
**Step 2:** Once the filter or group has been created, select Tools -> Data Management -> Territory Realignment



**Step 3:** From the dropdown, find the filter or group you have set up and select it

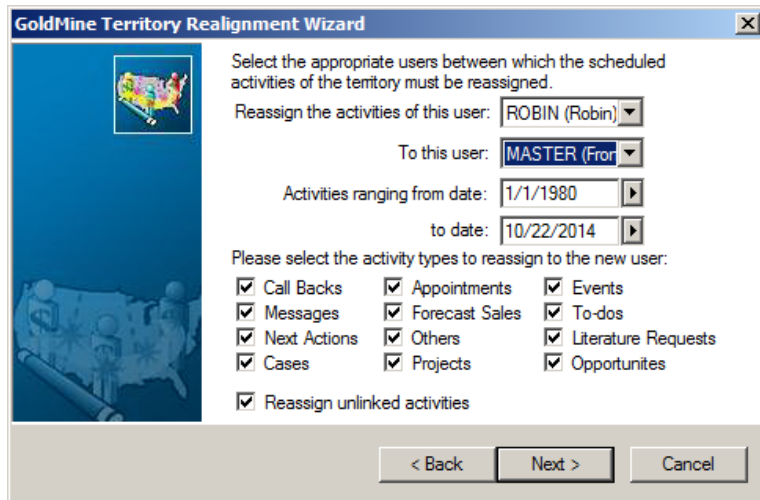


**Step 4:** On the next screen you are able to select fields and replace them with a value for the selected filter or group, in this example; we are replacing our Sales Rep field with 'Master' – their new rep



**Step 5:** From this step in the wizard, you are able to control a number of changes:

- From/To which user would you like to reassign the tasks
- Is there a specific date range you would like to alter (if the new rep will just be covering the desk for a few months)
- The type of activities you would like to reassign



The screenshot shows the 'GoldMine Territory Realignment Wizard' dialog box. It features a blue header with the title and a close button. On the left, there is a small map of the United States. The main area contains the following text and controls:

Select the appropriate users between which the scheduled activities of the territory must be reassigned.

Reassign the activities of this user:

To this user:

Activities ranging from date:  to date:

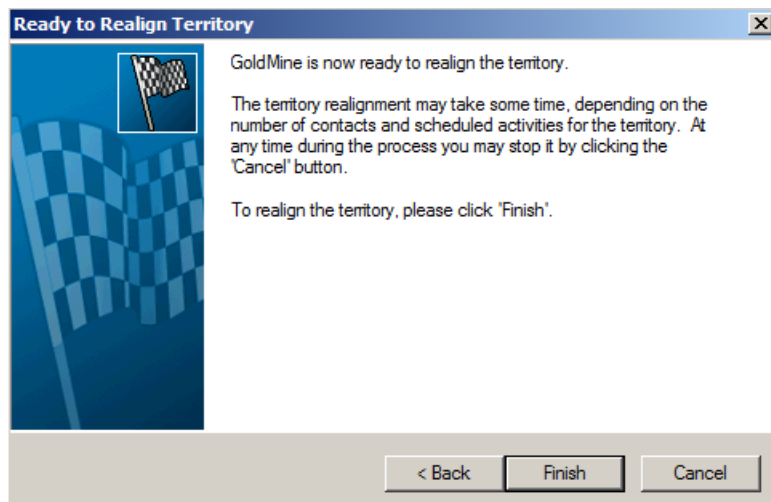
Please select the activity types to reassign to the new user:

<input checked="" type="checkbox"/> Call Backs	<input checked="" type="checkbox"/> Appointments	<input checked="" type="checkbox"/> Events
<input checked="" type="checkbox"/> Messages	<input checked="" type="checkbox"/> Forecast Sales	<input checked="" type="checkbox"/> To-dos
<input checked="" type="checkbox"/> Next Actions	<input checked="" type="checkbox"/> Others	<input checked="" type="checkbox"/> Literature Requests
<input checked="" type="checkbox"/> Cases	<input checked="" type="checkbox"/> Projects	<input checked="" type="checkbox"/> Opportunities

Reassign unlinked activities

At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

**Step 6:** If you are done your selections, click 'Finish' – Note: There is NO undo button, do not finish unless you are absolutely sure.



The screenshot shows the 'Ready to Realign Territory' dialog box. It features a blue header with the title and a close button. On the left, there is a checkered flag icon. The main area contains the following text:

GoldMine is now ready to realign the territory.

The territory realignment may take some time, depending on the number of contacts and scheduled activities for the territory. At any time during the process you may stop it by clicking the 'Cancel' button.

To realign the territory, please click 'Finish'.

At the bottom, there are three buttons: '< Back', 'Finish', and 'Cancel'.

Notice that all of the selected activities were transferred to 'Master'

