



Territory Management

A Salesforce-native app revolutionizing territory management with dynamic data-driven assignment and territory optimization.

Territory Management is designed to streamline and optimize territory management in Salesforce for Sales and Service teams. With its advanced features, it efficiently organizes and assigns territories, ensuring that each lead, case, or opportunity is matched with the most suitable team member. Territory Management simplifies complex territory definitions, enhances operational agility, and offers real-time analytics for data-driven decision-making.

Datasheet

Version 1.1

KEY FEATURES



Flexible Territory Definition

Tailor your sales and support territories to meet your unique business objectives.



Address Normalization

Ensure uniform and standardized address formats for seamless operations across territories.



Real-Time Tracking and Reporting

Fully integrated with Salesforce reporting tools for immediate analytics and insights.



Territory Stamping

Automatically categorize leads and cases to streamline your territory management.



Channel Management

Coordinate distributors and resellers (and suppliers) within a unified territory framework.



Advanced territory assignment rules

Deploy dynamic rules which assign the right work item (e.g. leads or cases) to the right user at the right time.

BENEFITS

Increased Productivity

Automated processes save time and reduce manual efforts.

Unified Platform

A single solution for all territory-related tasks, reducing the need for multiple tools.

Enhanced Effectiveness

Real-time data integration improves decision-making and operational efficiency.

Data-Driven Insights

Gain immediate insights for continuous performance improvement.

USE CASES

SALES TERRITORIES

In complex sales organizations, define, stamp, and dynamically allocate leads and opportunities based on customized sales territories. Ensure that each lead or opportunity is assigned to the best-suited sales rep within the designated territory, optimizing conversion rates and sales performance.

SERVICE TERRITORIES

Elevate your customer service by matching every incoming case to the most appropriate agent within defined customer service territories. Shorten time-to-first-response and improve case resolution times, all while meeting SLA requirements. Result? Faster resolutions, superior outcomes, and delighted customers.

CHANNEL MANAGEMENT

Streamline the management of your distributors, resellers, and other sales channels with Territory Assignment's robust channel management features. Assign, track, and coordinate multiple sales channels within unified territories, ensuring harmonious operations and maximizing channel performance

DYNAMIC TERRITORY ASSIGNMENT

Combine Territory Assignment, Q-assign and real-time analytics, to automatically assign incoming work-items to the most suitable person within predefined territories – taking into account variables like workload, expertise, and location.

**For further information please contact
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