

Balancing your Territories

Once you have Territories added as a layer to your project you can use the **Territories Panel** to control the appearance of the layer, as well as the data associated with it. The following instructions will give you a step by step guide on how to switch on the **Balance Territories** function which will enable you to view the balance of your Territories and to monitor how the balance changes as you change the size of your Territories.

Before you begin

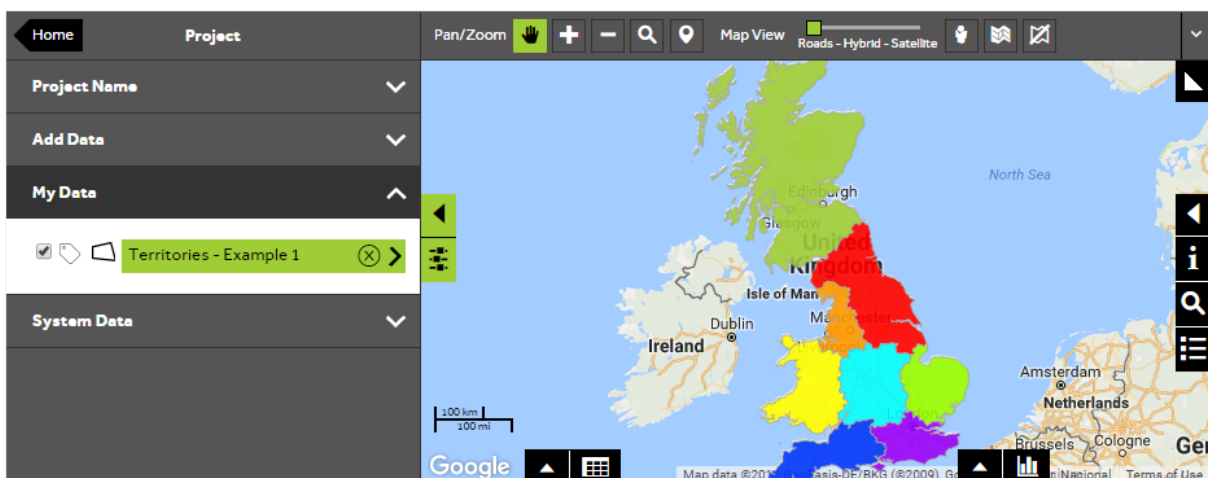
Before you start editing your Territories, make sure that you have your data set up in a saved project. If you need assistance getting the data into SKiN please refer to the following sections:

- Territories Steps - Create Project
- Territories Steps - Import Data



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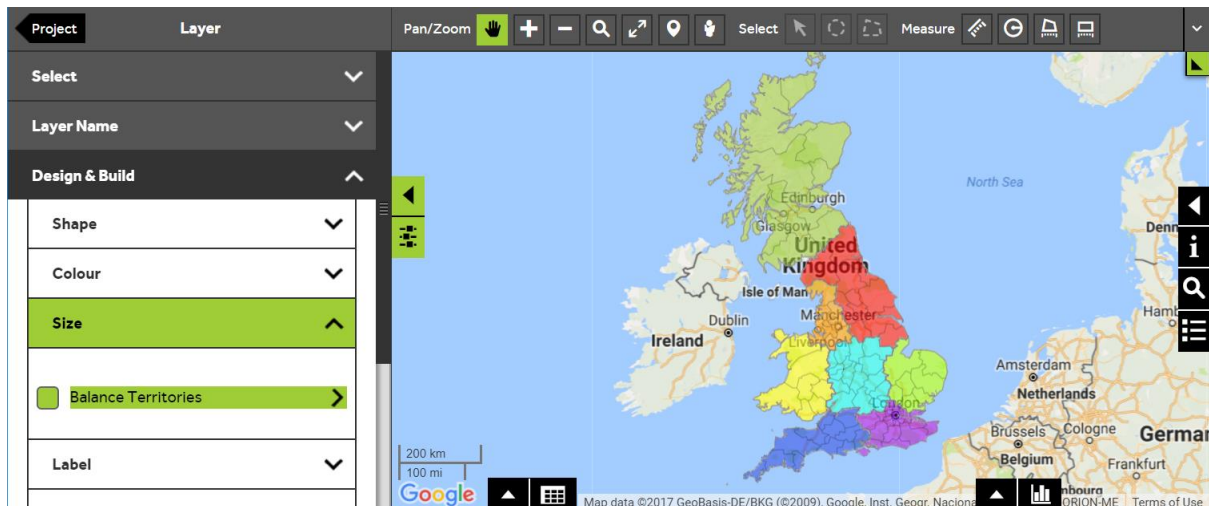
- To view your own data, **Open an existing project** and then select **My Data**, click on the Territory layer you wish to look at.



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Access the Balance Territories function

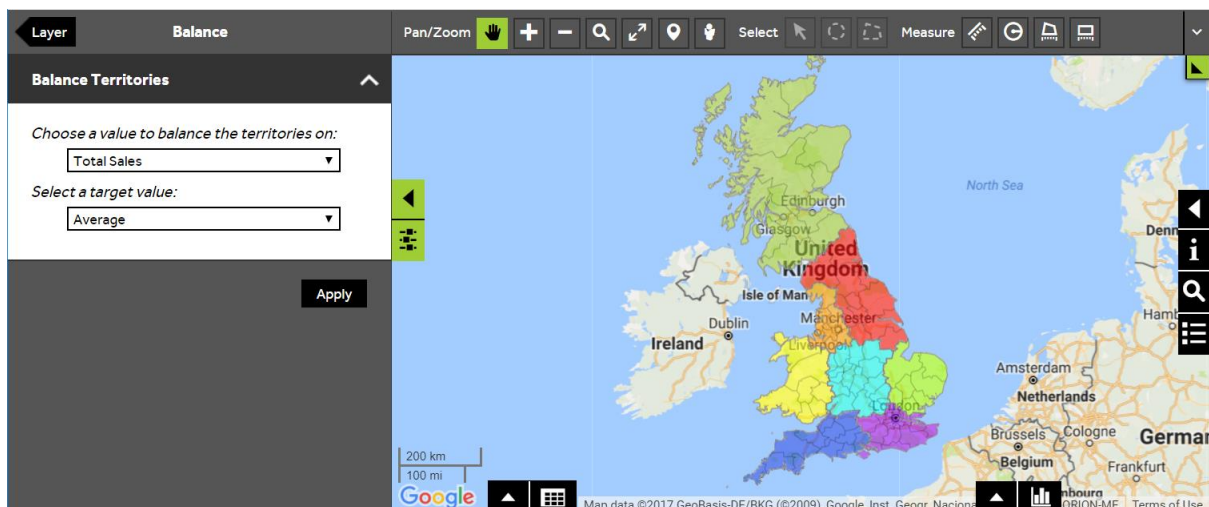
- To access the **Balance Territories** function, select **Design & Build**, then select **Size** and click on **Balance Territories**.



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Choose a value to balance Territories on

- In the first dropdown box, select the data variable that you wish to use to balance your Territories on. You can select any numeric variable from the data in your layer. The target value box is set to **Average** which will allow you to monitor the balance of your Territories based on the average total value of your data per Territory. Press **Apply** once you have selected your data variable and click on the **Layer** back arrow to return to the **Layer Panel**.



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View the Territory balance

- To open the **Balance View** click on the data grid icon found at the bottom left of the map. The data grid should now open with the **Balance View** selected. The balance view shows the following data columns for each of your Territories:

Total Data - The total data for the variable that you chose to balance your Territories on

Average - The average of your chosen data variable per Territory

Variance - The amount above or below the average value

Variance % - The percentage variance deviation

Index – An index chart to easily identify Territories which are above or below the average

- Changes will be automatically updated in the data grid as components are added / removed from Territories. Please refer to 'Territory Steps – Add or Remove Components' for step-by-step guide to modifying your Territories.

The screenshot shows the Geoplan software interface. On the left is a sidebar with 'Project' and 'Design & Build' sections. The 'Design & Build' section has 'Size' selected. The main area shows a map of the UK with territories highlighted in different colors. Below the map is a data grid table with the following data:

ID	Total Sales	Average	Variance	Variance %	Index
TERRITORY 1	6148	6549.75	-401.75	-6.13%	
TERRITORY 2	6661	6549.75	111.25	1.70%	
TERRITORY 3	6555	6549.75	5.25	0.08%	
TERRITORY 4	2922	6549.75	-3627.75	-55.39%	
TERRITORY 5	3295	6549.75	-3254.75	-49.69%	

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What do you want to do next?

You may wish to try add to or remove components from your Territories so that they are more balanced or you may wish to calculate a new data column. Please refer to the following sections for further assistance:

- Refer to: **Territories Steps – Add or Remove Components**
- Refer to: **Territories Steps – Calculate New Column**
- Contact: **Geoplan Support**