How to maintain your field force in effectmanager

If you have any updates to your field force, this guide shows you how to maintain your field force in effectmanager.

If you have updates to your field force login to effectmanager to make your correction.

If you do not have access to Districts & Sales Reps, please [contact our support](#) to have this permission added.

In this guide, we will go through the following

- [How stores are created in the file](#)
- [How to update stores in effectmanager](#)
- [How to update stores with excel import](#)

⚠️ **OBS!** It is important to coordinate internally who makes updates to your Districts & Sales reps if you use Excel import. This is to avoid that two people will not make corrections in two different file versions at once. Then corrections will overwrite each other.

How stores are created in the Districts & Sales reps

The stores in your Districts & Sales reps are created from the Sales files you upload to effectmanager. The stores are visible in the POS cube also. Please read below how the stores are created.

New stores in the file: Stores are created in Districts & Sales Reps when there have been POS sales in the store. If you know a new store is to open, but it is not in the file, you must wait until there have been POS sales on the store. When a store is visible in the POS cube, you will also be able to add a Sales Rep to the store.

Duplicate stores in the file: If a store gets a new internal number in the chain a new store will be created in Districts & Sales Reps when you have had POS sales in the store.
Old or closed stores are saved in Districts & Sales reps for your Sales rep to still be able to see historic data on the old store.
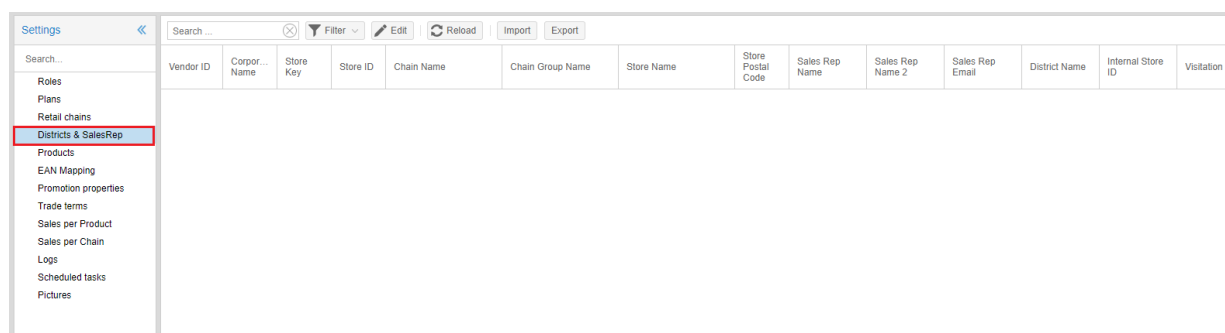**You can flag a closed store as Inactive** and filter out these Inactive stores when doing changes to your Districts & Sales reps.

👍 **Pro tip:** If a new store is in your Sales files loaded to effectmanager, it will be visible in the Districts & Sales Reps file the next day.

⚠️ **OBS!** It is very important not to try and add new stores with StoreID, etc. to the file. if you do so your corrections will not be updated in effectmanager, as the import will fail.

How to update stores in effectmanager

1. In effectmanager go to Settings and navigate to Districts & Sales Reps.

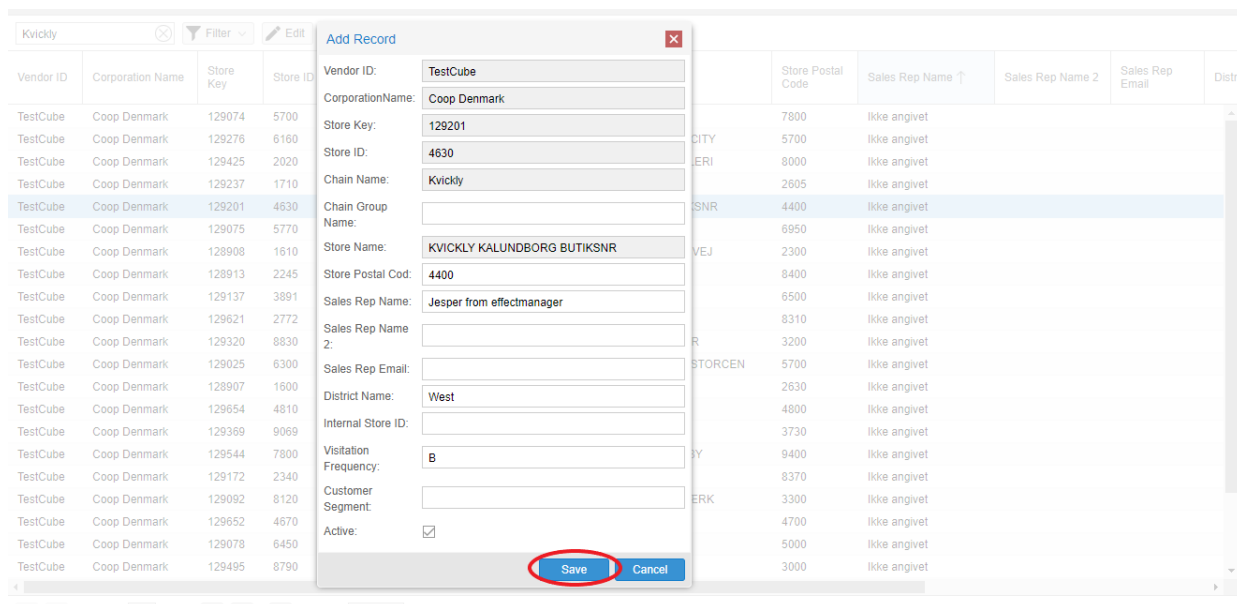**2.** Select the store you want to do the correction to, it is selected when it is blue, and press Edit.

👍 **Pro tip:** Using the filters, you can easily find the stores you are looking for by filtering on everything from wholesaler, chain, sales rep name, etc.

Vendor ID	Corporation Name	Store Key	Store ID	Chain Name	Chain Group Name	Store Name	Store Postal Code	Sales Rep Name ↑	Sales Rep Name 2	Sales Rep Email	Distri
TestCube	Coop Denmark	129074	5700	Kvickly		COOP KVICKLY SKIVE	7800	Ikke angivet			
TestCube	Coop Denmark	129276	6160	Kvickly		COOP KVICKLY SVENDBORG CITY	5700	Ikke angivet			
TestCube	Coop Denmark	129425	2020	Kvickly		COOP KVICKLY BRUUNS GALLERI	8000	Ikke angivet			
TestCube	Coop Denmark	129237	1710	Kvickly		COOP KVICKLY BRØNDBY	2605	Ikke angivet			
TestCube	Coop Denmark	129201	4630	Kvickly		KVICKLY KALUNDBORG BUTIKSNR	4400	Ikke angivet			
TestCube	Coop Denmark	129075	5770	Kvickly		COOP KVICKLY RINGKØBING	6950	Ikke angivet			
TestCube	Coop Denmark	128908	1610	Kvickly		COOP KVICKLY STRANDLODSVEJ	2300	Ikke angivet			
TestCube	Coop Denmark	128913	2245	Kvickly		KVICKLY EBELTOFT	8400	Ikke angivet			
TestCube	Coop Denmark	129137	3891	Kvickly		COOP KVICKLY VOJENS	6500	Ikke angivet			
TestCube	Coop Denmark	129621	2772	Kvickly		COOP KVICKLY TRANBJERG	8310	Ikke angivet			
TestCube	Coop Denmark	129320	8830	Kvickly		KVICKLY HELSINGE, BUTIKSNR	3200	Ikke angivet			
TestCube	Coop Denmark	129025	6300	Kvickly		COOP KVICKLY SVENDBORG STORCEN	5700	Ikke angivet			
TestCube	Coop Denmark	128907	1600	Kvickly		COOP KVICKLY TAASTRUP	2630	Ikke angivet			
TestCube	Coop Denmark	129654	4810	Kvickly		COOP KVICKLY NYKØBING F	4800	Ikke angivet			
TestCube	Coop Denmark	129369	9069	Kvickly		COOP KVICKLY NEXØ	3730	Ikke angivet			
TestCube	Coop Denmark	129544	7800	Kvickly		COOP KVICKLY NØRRESUNDBY	9400	Ikke angivet			
TestCube	Coop Denmark	129172	2340	Kvickly		COOP KVICKLY HADSTEN	8370	Ikke angivet			
TestCube	Coop Denmark	129092	8120	Kvickly		COOP KVICKLY FREDERIKSVÆRK	3300	Ikke angivet			
TestCube	Coop Denmark	129652	4670	Kvickly		COOP KVICKLY NÆSTVED	4700	Ikke angivet			
TestCube	Coop Denmark	129078	6450	Kvickly		COOP KVICKLY SKIBHUSVEJ	5000	Ikke angivet			
TestCube	Coop Denmark	129495	8790	Kvickly		COOP KVICKLY HELSINGØR	3000	Ikke angivet			

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3. In the pop-up you can now make the corrections needed. The fields that are greyed out you cannot make corrections to.

NB! Fields that are not editable are greyed out. If you need further descriptions of the fields, please jump to the Excel column descriptions.

4. Finish your corrections to the store by pressing Save. The changes are reflected in effectmanager instantly.

Changes to the Districts & Sales Reps will be reflected in the cube a quarter past every hour. Meaning that at 8:15, 9:15, 10:15, 11:15, etc. changes will be reflected in the cube.E.g if you do corrections to your Districts & Sales Reps at 9.45 your changes will be reflected in the cube at 10.15

How to update stores with the Excel file import

If you have corrections to multiple stores, we recommend using the Excel file export/import to do the corrections.

> ⚠️ **OBS!** It is important to coordinate internally who makes updates to your Districts & Sales reps if you use Excel import. This is to avoid that two people will make corrections in two different file versions at once. Then corrections will overwrite each other.

1. In effectmanager go to Settings and navigate to Districts & Sales Reps.

2. If you wish to only export certain stores, you can filter the view before exporting the file.

> 👍 **Pro tip:** Using the filters, you can export an Excel file for a certain Wholesaler, a chain, a sales rep, only active stores, or how you prefer.
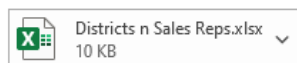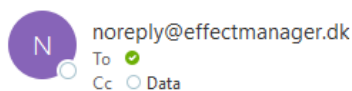
3. Press *Export* and make the corrections to your file. Below is a description of all the columns in the Excel file. [Jump to Excel column description.](#)

4. To import the file, press *Import* and find your file. Finish by pressing *Upload.*

Vendor ID	Corporation Name	Store Key	Store ID	Chain Name	Chain Group Name	Store Name	Store Postal Code	Sales Rep Name ↑	Sales Rep Name 2	Sales Rep Email	Distri
TestCube	Coop Denmark	129074	5700	Kvickly		COOP KVICKLY SKIVE	7800	Ikke angivet			
TestCube	Coop Denmark	129276	6160	Kvickly		COOP KVICKLY SVENDBORG CITY	5700	Ikke angivet			
TestCube	Coop Denmark	129425	2020	Kvickly		COOP KVICKLY BRUUNS GALLERI	8000	Ikke angivet			
TestCube	Coop Denmark	129237	1710	Kvickly		COOP KVICKLY BRØNDBY	2605	Ikke angivet			
TestCube	Coop Denmark	129201	4630	Kvickly		KVICKLY KALUNDBORG BUTIKSNR	4400	Ikke angivet			
TestCube	Coop Denmark	129075	5770	Kvickly		COOP KVICKLY RINGKØBING	6950	Ikke angivet			
TestCube	Coop Denmark	128908	1610	Kvickly		COOP KVICKLY STRANDLODSVEJ	2300	Ikke angivet			
TestCube	Coop Denmark	128913	2245	Kvickly		KVICKLY EBELTOFT	8400	Ikke angivet			
TestCube	Coop Denmark	129137	3891	Kvickly		COOP KVICKLY VOJENS	6500	Ikke angivet			
TestCube	Coop Denmark	129621	2772	Kvickly		COOP KVICKLY TRANBJERG	8310	Ikke angivet			
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TestCube	Coop Denmark	129652	4670	Kvickly		COOP KVICKLY NÆSTVED	4700	Ikke angivet			
TestCube	Coop Denmark	129078	6450	Kvickly		COOP KVICKLY SKIBHUSVEJ	5000	Ikke angivet			
TestCube	Coop Denmark	129495	8790	Kvickly		COOP KVICKLY HELSINGØR	3000	Ikke angivet			

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5. When the import is done, you will receive an Email confirmation and changes are reflected in effectmanager.

NB! While the import is in progress, other people cannot make changes to the Districts & Sales Reps window.

Districts And Rep Names import successful

noreply@effectmanager.dk
To ✓
Cc ○ Data

Districts n Sales Reps.xlsx
10 KB

Districts And Rep Names import triggered for file: Districts n Sales Reps.xlsx succeded

Import status: (9 out of 9 entries were imported).

Attached you can find the imported file.

Best regards,
Effectmanager Team

Changes to the Districts & Sales Reps will be reflected in the cube a quarter past every hour. Meaning that at 8:15, 9:15, 10:15, 11:15, etc. changes will be reflected in the cube.
E.g if you do corrections to your Districts & Sales Reps at 9.45 your changes will be reflected in the cube at 10.15

Districts & Sales Reps Excel Column Description.

Columns A-E: Cannot be edited. These columns are generated by effectmanager or the retailer.

Column F: Can be used for the segmentation you wish to add.

Column G: Is generated by the retailer and cannot be edited.

Column H: This is prefilled for the stores, where wholesalers share postal codes in the sales files loaded. Every correction made to this field will overwrite what are in the files from the wholesalers.

A: YOUR COMPANY

C: UNIQUE TO THE STORE is generated by effectmanager

E & G: Generated by the retailer

H: Filled out for Corporations who share it in the file. Can be overwritten by your data input.

B: THE RETAILER

D: UNIQUE TO THE STORE is generated by the retailer

F: Can be used for further segmentation

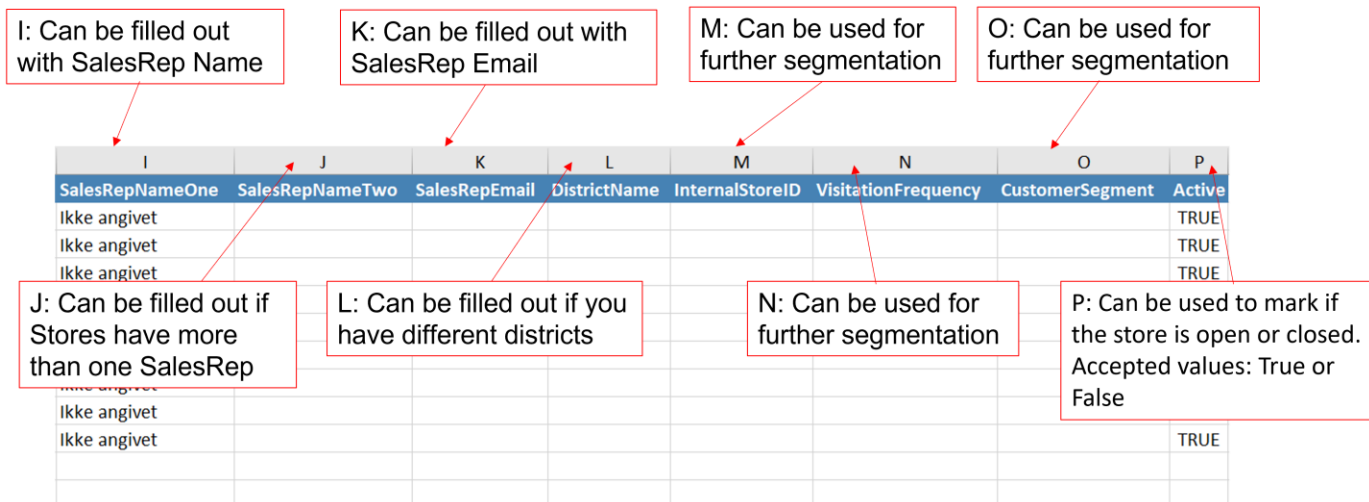| A	B	C	D	E	F	G	H
VendorID	CorporationName	StoreKey	StoreID	ChainName	ChainGroupName	StoreName	StorePostalCode
TestCube	Coop Denmark	129074	5700	Kvickly		COOP KVICKLY SKIVE	7800
TestCube	Coop Denmark	129276	6160	Kvickly		COOP KVICKLY SVENDBORG CITY	5700
						CKLY BRUUNS GALLERI	8000
						CKLY BRØNDBY	2605
TestCube	Coop Denmark			Kvickly		KVICKLY KALUNDBORG BUTIKSNR	4400
TestCube	Coop Denmark	129075	5770	Kvickly		COOP KVICKLY RINGKØBING	6950
TestCube	Coop Denmark	128908	1610	Kvickly		COOP KVICKLY STRANDLODSVEJ	2300
TestCube	Coop Denmark	128913	2245	Kvickly		KVICKLY EBELTOFT	8400
TestCube	Coop Denmark	129137	3891	Kvickly		COOP KVICKLY VOJENS	6500

Column descriptions are continued on the next page

Column I: Can be filled out with name or other identifiers used for your field force.

Column J: Can be filled out if a store is visited by more than one sales rep.

Column K: Can be filled out with the sales rep email or used for further segmentation.

Column L: Can be filled out if you have different districts identifiers.

Column M-O: Can be used for further segmentation of your field force.

I: Can be filled out with SalesRep Name

K: Can be filled out with SalesRep Email

M: Can be used for further segmentation

O: Can be used for further segmentation

SalesRepNameOne	SalesRepNameTwo	SalesRepEmail	DistrictName	InternalStoreID	VisitationFrequency	CustomerSegment	Active
Ikke angivet							TRUE
Ikke angivet							TRUE
Ikke angivet							TRUE
Ikke angivet							
Ikke angivet							
Ikke angivet							TRUE

J: Can be filled out if Stores have more than one SalesRep

L: Can be filled out if you have different districts

N: Can be used for further segmentation

P: Can be used to mark if the store is open or closed. Accepted values: True or False