Territory & Account Assig

User Guide · Odoo 18.0 & 19.0

Define sales territories by UK postcode area, region or industry; bulk reassign accounts with full history

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1. Overview

Territory & Account Assignment Manager
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Sales territory management is usually a manual mess of spreadsheets. This module lets you define territories by rule - UK postcode areas, country/region, or industry - assign an owner (salesperson) and sales team to each, then assign or bulk-reassign customer accounts to the right territory automatically.

Every assignment is recorded with a full history (who moved, from which territory, to which, when and why) so you can answer "who owned this account last quarter?" instantly. A matching engine evaluates a partner against the territory rules and proposes the best-fit territory; a bulk wizard re-runs the matching across thousands of accounts in one click.

Built on standard res.partner, crm.team and res.users data - no external service.

2. Installation

Open Apps, click Update Apps List, search for “Territory & Account Assig” (technical name **gb_territory_account_assignment_manager**) and press Install. The module supports Odoo 18.0 and 19.0, Community and Enterprise.

3. Menus & Navigation

After install the following menus become available:

- Coverage Report
- Territories
- Territories
- Assignment History
- Bulk Assign
- Configuration
- All Rules

4. Feature & Data-Model Reference

The app implements the following records and engines:

Model	Purpose
sales.territory.assignment.history	Territory Assignment History
sales.territory.coverage.report	Territory Coverage Report
sales.territory.rule	Sales Territory Matching Rule
sales.territory	Sales Territory
sales.territory.bulk.assign.wizard	Bulk Territory Assignment

5. Typical Workflow

1. Open the app's Configuration menu and set up the master data / policies it needs.
2. Create the main operational record from its primary menu.
3. Use the action buttons on the form (e.g. Confirm / Compute / Post / Generate) to run the engine.
4. Review the results in the list, pivot and report views; export or post where applicable.

6. Support

Email **support@pokutsoft.com** or visit **https://pokutsoft.com**. Please include your Odoo version (18.0 / 19.0) and the module technical name.