Setting a tribe's territory

Drawing the area a tribe covers, listing its postcodes, and what a territory is actually used for.

A **tribe** is one location, branch or business unit inside your organisation. Its address says where it sits. Its **territory** says which area it covers, which is a different question and often a much larger area. One tribe on one side of a city may serve half of it; two tribes a few streets apart may serve quite separate suburbs. Setting a territory is how you tell Gorilla Dash the difference, so that a customer looking for their nearest location is sent to the tribe that actually serves them rather than the one that happens to be a shorter drive away.

Where to set it

Open the tribe from your tribe list, choose **Tribe Settings** in the tribe's menu, and go to the **Address & Territory** tab. Below the address and its map you will find **Tribe Territory**, which holds both ways of describing the area: a boundary you draw on a second map, and a list of **Territory Postcodes / ZIP codes**. You can use either on its own, or both together.

> **THIS SCREEN IS ORG ADMINS ONLY**
> Tribe Settings is marked **Org admins only**, because it holds the things a tribe must not change about itself — and a territory is one of them. A franchisee who cannot see the screen is not missing a permission they can be granted; territories are set at head office.

Two maps, doing two different jobs

The tab shows a map twice, and it is worth knowing which is which before you start, because the mistake is easy to make and quiet when you make it. The upper map, directly under the address fields, carries a single draggable pin that is the tribe's own position — the latitude and longitude every search depends on. Drag that pin, press **Set pin location from address**, or type into the **Latitude** and **Longitude** fields beneath it, and you are correcting where the tribe is.

The lower map, under the **Tribe Territory** heading, is where the boundary is drawn. It shows the tribe's pin from the upper map too, so you can see where the tribe sits inside its territory, but that pin cannot be dragged here. If the tribe is in the wrong place on the map, correct it on the upper map, not this one.

Drawing a boundary

The map is the more precise of the two ways of describing a territory, because a real trading area rarely follows postcode lines. Along the top of the territory map sit three buttons — **Move map**, **Draw area** and **Clear all**. Once there is something to say, a black hint bar appears underneath them telling you what the map is expecting next. Read it as you go; it changes once you have placed the third corner, which is the point at which the shape can be saved.

1. Drag and zoom the map until you can see the whole area the tribe covers. Getting the view right before you start saves you clicking corners you cannot see.
2. Choose **Draw area**. The button turns red and the cursor becomes a crosshair.

3. Click once on each corner of the boundary. A shaded shape follows your clicks. Three corners is the minimum, and there is no maximum — click as often as the boundary needs.
4. When the shape is complete, click **Save area** in the hint bar. It stays grey until you have placed three corners, then turns red. (Double-clicking the map does the same thing, but the button is the reliable way.) The finished shape gains white handles, and the map stays in **Draw area** so you can start the next piece straight away.
5. Repeat steps 3 and 4 if the territory is in separate pieces — a tribe that covers two towns with somebody else's area in between, for example. When every piece is drawn, choose **Move map**.
6. Save the tribe.

> **A SHAPE IS NOT DRAWN UNTIL YOU CLICK SAVE AREA**
> Clicking corners only builds a preview. If you click the corners and then save the tribe without clicking **Save area** first, the shape was never added and the work is lost with no warning. Clicking back on the corner you started at does not close the shape either — it simply adds another corner. The ring is joined up for you when the area is saved.

Changing or removing a shape

A finished shape can be adjusted without redrawing it. With **Move map** selected, drag any of the white handles along its edge to move a corner, or drag one of the fainter handles between two corners to add a new one. This is usually quicker than starting again when a boundary needs to grow by a suburb or two.

- To remove one shape, click inside it and choose **Delete**.
- To remove every shape at once, choose **Clear all** and confirm.

> **NOTHING TAKES EFFECT UNTIL YOU SAVE**
> The boundary is turned into the shape searches actually use at the moment the tribe is saved. If you draw, reshape or delete an area and navigate away without saving the tribe, none of it is kept and searches carry on using whatever was there before.

Listing postcodes

Where your territories genuinely follow postal boundaries, a list of postcodes is quicker to maintain than a drawn shape and easier to hand to a franchisee in writing. Type each code and press Enter to add it as an entry of its own. You can also paste a whole list in one go, and it will be split into separate entries for you: commas, semicolons, spaces and line breaks all count as separators, so a column copied straight out of a spreadsheet works just as well as a comma-separated line. The hint underneath the field mentions only commas, but the others work too.

Because a space separates one code from the next, a postcode that has a space inside it cannot be pasted. Pasting "SW1A 1AA, EC1A 1BB" gives you four entries — SW1A, 1AA, EC1A and 1BB — instead of the two you meant, and not one of the four will ever match a customer. If your country writes postcodes with a space in them, as the United Kingdom, Canada and the Netherlands do, type each code and press Enter rather than pasting. If a list has already been pasted, read the entries back one by one before you save: a territory that has been split this way looks perfectly full on screen, which is why the problem tends to surface as a misrouted enquiry weeks later.

A POSTCODE HAS TO MATCH EXACTLY

A customer's address is looked up first, and the postcode that comes back is compared against your list character for character. "2000" and "NSW 2000" are not the same entry, and neither are "SW1A 1AA" and "SW1A1AA". Enter each code the way the postal service writes it, with nothing added. A code that is wrong — whether from a typo or from a paste that split it in half — will never match anything, and there is no warning to tell you so.

What a territory is used for

A territory is used for one thing: working out which tribe a customer belongs to when somebody or something has to decide. That covers the location finder on your website, the website chatbot when a visitor names where they are, the **tribe search endpoint** in the API, and the tribe an enquiry pushed in through the API is assigned to. All of them ask the same question in the same way, which is described in **How a customer is matched to a tribe**.

WHAT A TERRITORY DOES NOT DO

It has no effect on reporting, on permissions, on which contacts belong to which tribe, or on what a tribe can see and edit. A contact living inside a tribe's territory is not thereby that tribe's contact. Grouping tribes for reporting is what **regions** and **tribe groups** are for.

Overlaps and gaps

Nothing stops two tribes claiming the same ground, and nothing requires your territories to cover the whole country. Both situations are handled, so neither is an error you need to hunt down:

- Where two territories overlap, an address inside both matches both tribes, and the nearer of the two is offered first.
- Where no territory covers an address at all, the search falls back to the nearest tribe by distance, so a customer always gets an answer.

A TRIBE WITH NO COORDINATES IS NEVER FOUND

Every part of the search needs a latitude and longitude on the tribe, so a tribe whose address has not been placed on the map is invisible to the location finder, to the chatbot and to the API — territory or no territory. The search itself also looks only at tribes with a status of **Active**, so one set to any of the other four statuses in that dropdown — Testing, Opening Soon, Paused or Deleted — will not be matched. The single exception is the stand-in tribe shown when a visitor's address cannot be looked up at all, which may be an Opening Soon tribe.