# ALLOCATE

QUICKSTART

CREATING MULTIPLE CIRCULAR TRADE AREAS

The following outlines the steps involved in creating multiple circular trade areas around a list of Postal Codes you have (for example, a list of store addresses) using **Allocate**.

Make sure you have a list of addresses (including Postal Codes) saved, but not open. It's easiest if you have it saved in an Excel file, but any database format (Access, etc) will do. In this example we will use an Excel file with 10 stores in Ottawa, Ontario.

Store Name	Address	City	Province / State	Postal / Zip Code
Kathryn's Coffee Shop	1831 Robertson Road	Ottawa	Ontario	K2H8X3
Andi and Coombs	1385 Woodroffe	Ottawa	Ontario	K2G1V8
Starbucks	1350 Baseline Road	Ottawa	Ontario	K2C0A9
Country Style	529 West Hunt Club Road	Ottawa	Ontario	K2G5W5
The Lean Bean	349 Preston Street	Ottawa	Ontario	K1S5N4
Burrill's Barristas	1124 Bank Street	Ottawa	Ontario	K1S3X6
Tiny Tim's Coffee	2210 Bank Street	Ottawa	Ontario	K1V1J5
Starbucks	421 Richmond Road	Ottawa	Ontario	K2A4H1
Country Style	787 Bank Street	Ottawa	Ontario	K1S3V5
The Happy Bean	47 Rideau Street	Ottawa	Ontario	K1N5W8

1. Open Allocate. The program defaults to the **Workspace** tab, but we're working with geography, so click on the **Geography** tab. This is where you begin selection of your geography.
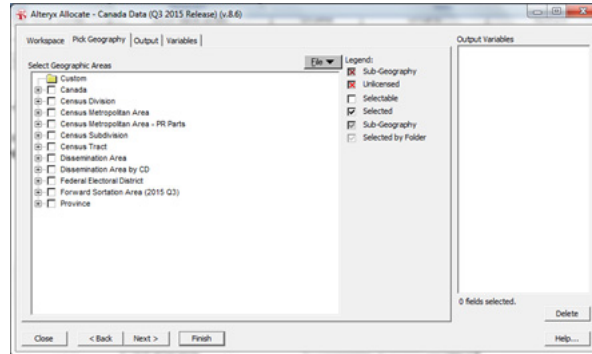
2. Click on the **File** button. A small pop-up menu will appear. Click on **Add Custom Geography**. Then, out of the five choices you are given, select **Add Point File**. In the pop-up window that appears, go to where you have the Excel file saved, make sure the **File Type** is set to Excel, and double-click on the file. Select the table in the Excel worksheet that contains the data.

The next window that appears asks for a few basic things. First, it wants to know which columns it should use for the Name and Key. The **Name Field** should be set to the Store Name in our example, the **Key Field** should be set to Postal Code. The **Radius or Doughnut** field is where you define the size of the circular trade area. In this example, we will use a 5 mile radius.
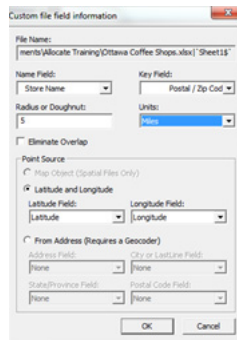
3. Now go to the **Point Source** area of the window and click on either Latitude and Longitude if you have those fields in your spreadsheet. If you don't and are going to geocode this spreadsheet, click on **From Address**. Make sure that the selections for each field match, ie. address in the **Address Field**, postal code in the **Postal Code Field.** Click **OK** and you will be taken back to the original **Geography** tab.

Note: You will now notice that a file has been created under **Custom** and **Point** Files. This is a temporary file that you can use for as long as you like, or until you click the **File** button and select **Clear Custom History** which will erase the file. If you are only planning to use this geography file temporarily, there is no need to read any further in this Quickstart, just select your variables and output method, and click the **Finish** button.

However, if you intend to use these geographies many times in the future, you can add them to the list of geographies that always appear in your version of **Allocate** (eg. CSDs, FSAs etc). This will also give you the advantage of being able to select trade areas individually (in the previous temporary method you can't select the trade areas individually).

To add these individual geographies to the list of geographies in **Allocate**, follow these steps:

1. Make sure that this is the only geography selected, and go to the **Output** tab.
2. In the **Output** tab, make sure the Output Mode is set to **File**. Click on the **Save As** button. Make sure the file type is set to MapInfo Table (*.tab).
3. Give your file a name (like Ottawa Coffee Shops – 5miles), click the **Save** button, and then click on the **Finish** button. **Allocate** will create the file.
4. When the **Processing Finished** window appears, simply click **Cancel**.
5. Now, go back to the **Geography** tab, and click the **File** button. This time select **Manage Virtual Geographies**. A new pop-up window will appear. Click on the **Create** button.

A window will pop-up asking you to find and select the .tab file you recently saved. Double-click on the file, and another small window will pop-up asking for some information. As long as Name appears under the **Name Field** and Key appears under the **Key Field**, click **OK**.

The next window to appear just asks you to name your list of stores. You can enter a name like Ottawa Coffee Shops into both the **Long** and **Short** Name fields, leave the Parent Geography alone. Next, click **OK** and you will then be asked for a name for the VGF file its going to create. You can give it the same name (Ottawa Coffee Shops), or another name if you wish. Click **OK**.
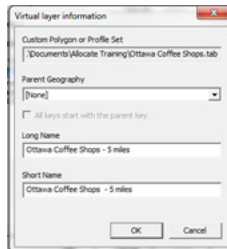
6. You will then be asked to save your VGF file. Give it a name (Ottawa Coffee Shops – 5 miles is still appropriate) and click **Save**. You will be back to the **Allocate Settings** window, and you will now see a new file listed in the **Virtual Geography Files** window, called Vancouver Stores – 5km. Click **OK** and **Allocate** will tell you it needs to re-start for the changes you've made to take effect. Click **OK** and **Allocate** will instantly start up again. Go into the **Geography** tab, and now among the levels of geography you will see one called Ottawa Coffee Shops – 5 miles. These are now saved for your use, and will be there each time you use **Allocate** (unless you choose to delete them). That's it! You are now ready to select analyze these trade areas by picking variables and an output method, or by mapping them.