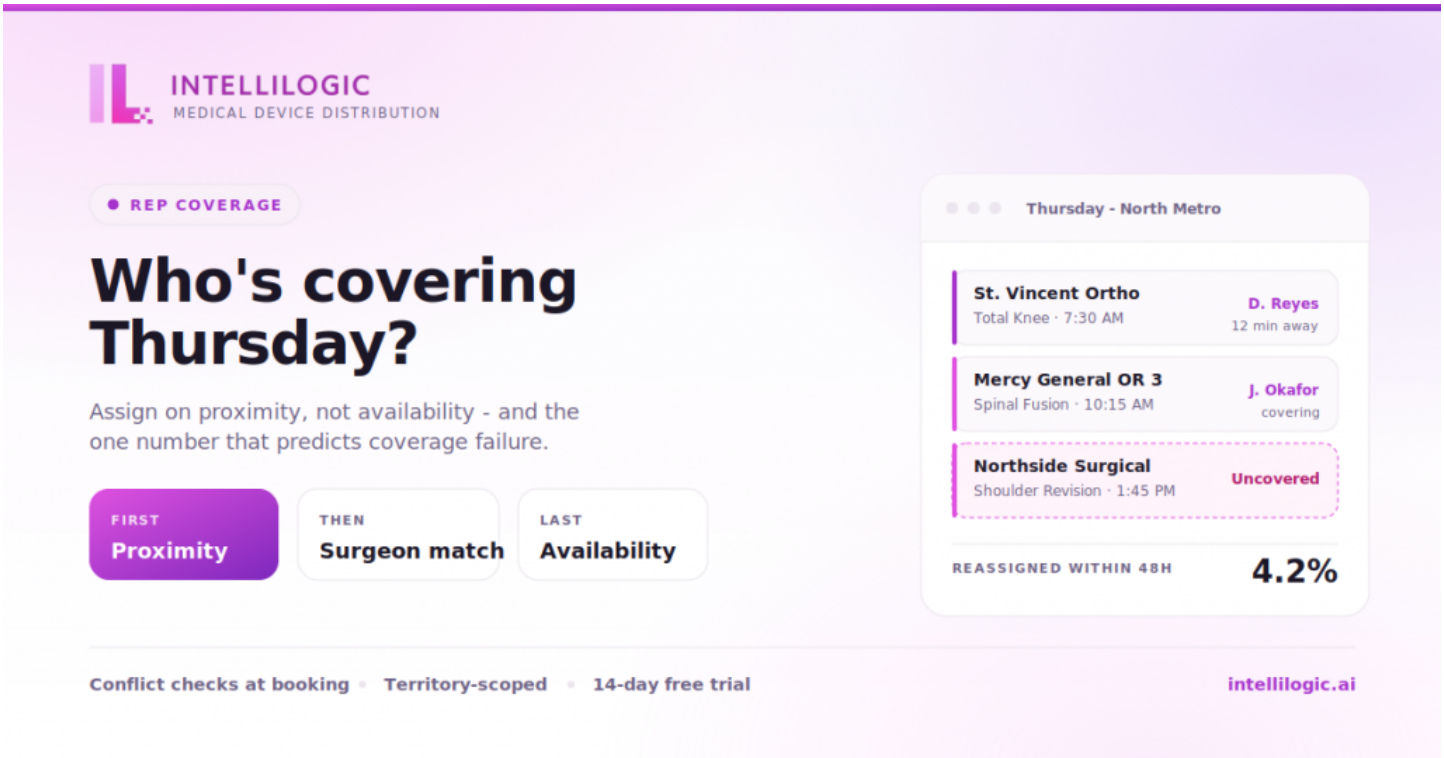
IntelliLogic Adds Territory-Scoped Scheduling for Medical Device Distributors

New module schedules surgical cases by priority or territory, assigns rep coverage, requests trays at booking and adds a CRM calendar with territory visibility.



Westerville, Ohio Sep 13, 2026 (Issuewire.com) - *IntelliLogic Adds Territory-Scoped Scheduling for Medical Device Distributors*

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IntelliLogic, a software platform for medical device distributors, today announced the release of its Scheduling module, which combines a surgical case calendar with a CRM activity calendar and lets field representatives see only the cases and events that belong to their territory.

In medical device distribution, a case is a scheduled surgery that a distributor supports by delivering instrument trays and implants and, in most instances, sending a representative to attend. Coordinating who covers each case, which trays it needs, and who should see it has typically been handled through a general-purpose calendar alongside a spreadsheet or group chat.

The surgical calendar records each case with its facility, surgeon, procedure type, date and time, billing status, territory, assigned and covering representative, and the tray templates and additional products the case requires. Cases can be viewed by priority, for operations teams deciding what to staff first, or by territory, so that a representative covering three hospitals in one metro area is not scrolling through cases from four states to find Thursday. Tray requirements are recorded at booking as templates rather

than specific physical trays, and resolved to actual trays at delivery.

Coverage assignment separates the assigned representative from the covering representative, so ownership of an account is preserved when a colleague steps in. Availability is checked at assignment. Further detail on the module is available at **https://www.intellilogic.ai/features/scheduling**.

“A rep does not need to see every case in the company. A rep needs to see their cases, and the cases in their territory that might need a hand,” said Karrie Short, founder of IntelliLogic. “Most shared calendars offer public or private and nothing in between. Territory is the level that makes a shared calendar usable for a field team.”

The CRM activity calendar covers everything a distribution team does that is not a surgical case: conferences, training, travel, meetings, calls and follow-ups. Each event has a start and end date, a start and end time or an all-day setting, a location, notes, and one of three visibility levels. Company makes the event visible to everyone in the organization. Private restricts it to the creator and company administrators. Territories shares it with representatives in one or more selected territories. Tasks and events can also be created directly on a surgeon, facility or contact record, each with a status, priority, assignee and due date.

The Scheduling module joins IntelliLogic’s case management, inventory, charge sheet, facility management, manufacturer management and representative management modules, all of which share one data model. IntelliLogic is priced at 499 US dollars per month for up to 20 users, with a 14-day free trial and no credit card required. The full platform is described at https://www.intellilogic.ai

About IntelliLogic

IntelliLogic builds software for medical device distributors, designed by people who ran distribution operations before writing a line of code. Founded by Karrie Short after more than a decade in the field, the platform covers surgical case scheduling, consignment inventory, digital charge sheets, facility and manufacturer records, and representative management in one place.

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