

Oracle® Territory Management

User Guide

Release 11i (11.5.9)

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Oracle Territory Management User Guide, Release 11i

Part No. B10552-01

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Oracle Territory Management User Guide, Release 11*i*

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- Did you find any errors?
- Is the information clearly presented?
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- Are the examples correct? Do you need more examples?
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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Territory Management User Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Territory Management

If you have never used Oracle Territory Management, Oracle suggests you attend one or more of the Oracle Territory Management training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Territory Management.

- Chapter 1 is an introduction to the application including key features and integration information.
- Chapter 2 provides access information and definitions of terms.
- Chapter 3 covers information useful to a salesperson.

- Chapter 4 covers procedures a sales manager uses to assign named accounts and update sales teams.
- Chapter 5 covers information the territory administrator needs to know to set up and maintain territories.
- Chapter 6 covers procedures a sales territory administrator uses to create territory groups and named accounts.
- Chapter 7 describes how to run reports that are useful for a territory administrator.
- Chapter 8 describes the territory lookup tool and the sales team lookup tool.
- Appendix A covers additional territory creation tools using territory type and templates, as well as information about escalation territories.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Territory Management.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Territory Management shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Territory Management.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Territory Management (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Territory Management Implementation Guide

This guide describes the steps needed to implement the application.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide

also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release *11i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release *11i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release *11i*. You cannot upgrade to Release *11i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Territory Management. This manual details additional steps and setup considerations for implementing Oracle Territory Management with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Territory Management with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Territory Management.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Territory Management implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Territory Management and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard

courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Territory Management working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle[®]8i server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With OracleMetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Alerts: You should check OracleMetaLink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus[®], Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle

Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Part I

Introduction and Overview

This part contains the following chapters:

- [Chapter 1, "Introduction to Oracle Territory Management"](#)
- [Chapter 2, "Overview of Using Oracle Territory Management"](#)

Introduction to Oracle Territory Management

This chapter discusses the key features and process flows of Oracle Territory Management. Sections in this chapter include:

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Oracle Territory Management Key Features"](#)
- [Section 1.3, "Oracle Territory Management Integrations"](#)
- [Section 1.4, "Process Flow for Creating Territories"](#)
- [Section 1.5, "Process Flow for Self-Service Named Accounts"](#)
- [Section 1.6, "What's New in this Release"](#)

1.1 Overview

Oracle Territory Management assigns business objects (customers, opportunities, and leads, for example) to resources based on configurable business rules. It defines who owns what.

An example of a sales territory is: all high-tech companies within a specific geographic area assigned to sales representative Joe.

A territory is composed of the following:

- Name for the territory
- Transaction qualifier rules
- Resources

This territory is defined as the following:

- Name: California High Tech Over 100
- Transaction qualifier rules
 - Account Classification = High Tech
 - State = California
- Resource: Joe

Oracle Territory Management supports the assignment of resources to the following business objects:

- Customers
- Leads
- Opportunities
- Service requests
- Tasks
- Contract renewals
- Defects
- Trade management claims and offers
- Delinquencies

1.2 Oracle Territory Management Key Features

Oracle Territory Management includes the following features:

- Over 100 qualifiers through which to define territory rules
- Assignment to individual resources or groups
- Assignment to individual resources or groups or teams (for service)
- Territory diagnostics

It supports:

- Real-time assignment
- Full and incremental batch mode assignment

The following are additional sales territory features:

- Named account support

- HTML based product flows for the distribution of named accounts
- Configurable territory exception handling
- HTML based sales team lookup tool

1.3 Oracle Territory Management Integrations

Oracle Territory Management uses resources defined in Resource Manager to assign resources to a territory. The following modules depend upon Oracle Territory Management:

- **Oracle TeleSales, Oracle Sales, and Oracle Sales Online:** accounts, leads, and opportunities are assigned to sales agents based on territory definitions. Oracle TeleSales and Oracle Sales Online also use the Territory Lookup Tool or the Sales Team Lookup to search for sales representatives.
- **Oracle Service:** incoming service requests or tasks are routed to appropriate resources.
- **Oracle Assignment Manager:** retrieves qualified resources identified in territories.
- **Oracle Trade Management:** offers and claims are assigned to qualified resources.
- **Oracle Collections:** delinquencies are assigned to the correct collections agents.
- **Oracle Quality Online** (formerly known as Oracle Defect and Enhancement Management): defects are assigned to appropriate resources.

Oracle Territory Management depends upon the following modules:

- **Oracle Resource Manager:** Resources are defined and can then be assigned to territories.
- **Oracle Workflow:** objects that end up in the catch all territory can start a workflow.
- **Trading Community Architecture**

1.4 Process Flow for Creating Territories

Following is the high level process for creating territories.

1. Business analysis and planning are vital first steps resulting in an implementation plan and a territory hierarchy.

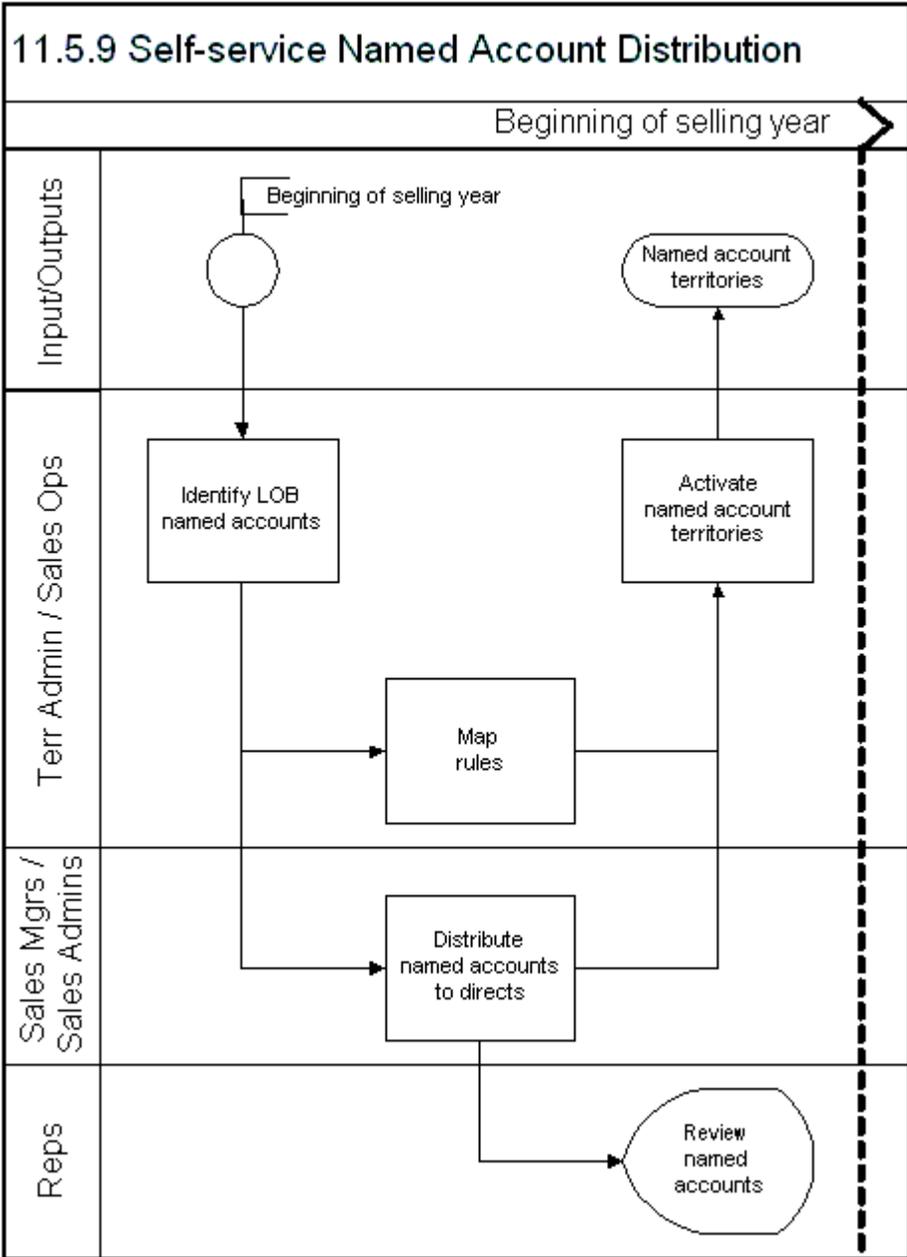
2. The territory administrator enables qualifiers that can be used when creating territories.
3. The territory administrator creates territories within the structure of a territory hierarchy.
4. If you are implementing self-service named accounts for Sales, then territory administrators create territory groups and the sales managers distribute named accounts top down through their sales hierarchies to individual representatives. Territory administrators then define named account rules. This step builds out the territory hierarchy further when step 5 is done.
5. The territory administrator runs the "Generate Territory Packages" concurrent program to enable current territory definitions.
6. Applications call Oracle Territory Management to return a set of resources for assignment to business objects.

1.5 Process Flow for Self-Service Named Accounts

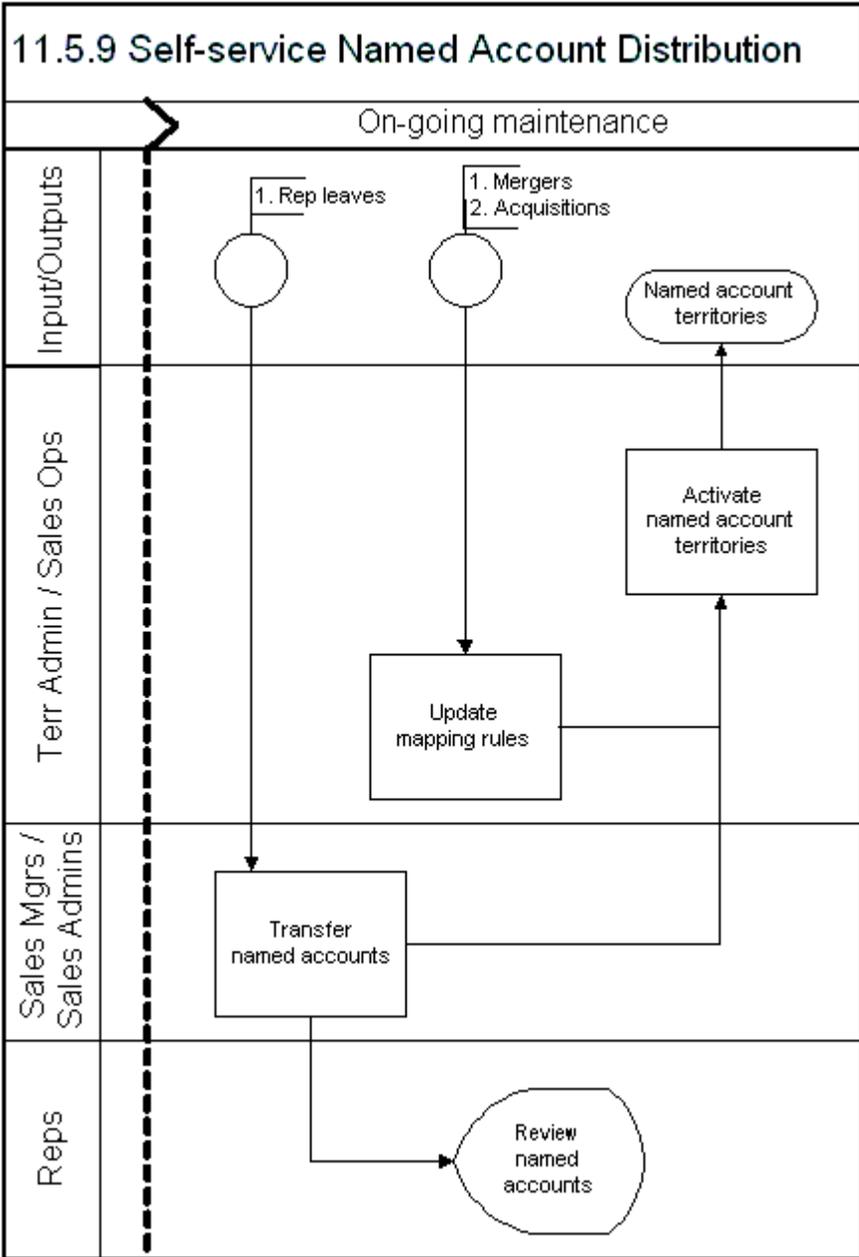
Following are the basic steps for creating named accounts and assigning them to salespeople.

1. The territory administrator creates a territory group.
2. The territory administrator defines named account rules that relate organizations to a named account. Named account rules match via customer name range and postal codes.
3. Sales managers assign named accounts to salespeople.
4. Sales managers can view the named accounts that their managers have assigned to them.
5. The territory administrator runs the "Generate Territory Packages" concurrent program to automatically generate territories to the existing territory hierarchy. Territories are generated with qualifier rules from named account rules and resource assignments determined by sales management.

The following chart shows the named account flow at the beginning of each year in relation to who performs the activities.



The following chart shows the flows involved in ongoing maintenance of named accounts and who performs the actions.



1.6 What's New in this Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

The following new features have been added to Oracle Territory Management in this release.

HTML Self-Service Named Accounts for Sales

Named accounts are centrally identified to a sales organization and distributed top down to individual salespeople. Sales managers use self-service pages to distribute named accounts.

Enhanced HTML Reporting and new Portlets

Sales managers and administrators can easily view the following information:

- Named account distribution
- Named account lists
- Unassigned named accounts
- Unmapped named accounts
- Counts of leads and opportunities that did not find a territory
- Named account conflicts

Configurable Territory Exception Handling for Sales

Integration with Oracle Workflow means you can define a workflow to handle exceptions in a territory group. An exception is an object (such as lead or account) that is not assigned to a territory but ends up in the catch all territory. Exceptions of a named account territory group are those customers, leads, or opportunities that match on customer name ranges defined for named accounts belonging to a territory group. This territory group catchall prevents named accounts from falling to lower ranked geographic territories.

Integration with Oracle Collections

Delinquencies are assigned to collections agents via Oracle Territory Management.

Overview of Using Oracle Territory Management

This chapter provides an overview of the user interface and the major tasks you can perform using Oracle Territory Management. Sections in this chapter include:

- [Section 2.1, "Accessing Oracle Territory Management"](#)
- [Section 2.2, "Accessing Oracle Territory Management Administration"](#)
- [Section 2.3, "Summary of Oracle Territory Management Tasks"](#)
- [Section 2.4, "Terms and Definitions"](#)

2.1 Accessing Oracle Territory Management

Use this procedure to access the self-service application for sales representatives and sales managers.

Prerequisites

None

Login

Log in to your personal home page (PHP).

Responsibility

Territory HTML Sales User

Navigation

PHP > Territory HTML Sales User

Steps

1. In the Self Service section of your personal home page Main Menu tab, choose Territory HTML Sales User.

The submenu displays available options, depending on whether you are a sales representative or a sales manager. You are a sales representative or sales manager based on whether or not you are the lowest level node in the Resource Manager sales hierarchy.

2.2 Accessing Oracle Territory Management Administration

Use this procedure to access the Forms windows to manually create and manage territories.

Prerequisites

None

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration

Steps

1. Select Administration > Define Territory.
2. Alternatively, you can right click a node in the Territory Navigator and select a menu option.

2.3 Summary of Oracle Territory Management Tasks

Use Oracle Territory Management to perform the following types of tasks:

- [Chapter 3, "Viewing Your Named Accounts \(Sales Representative\)"](#)
- [Chapter 4, "Managing Named Accounts \(Sales Manager\)"](#)
- [Chapter 5, "Using the Territory Lookup Tool"](#)

- [Chapter 6, "Administering Named Accounts \(Administrator\)"](#)
- [Chapter 7, "Creating Territories \(Forms Territory Administrator\)"](#)
- [Chapter 8, "Running Reports in Territory Manager"](#)

2.4 Terms and Definitions

Automatic Assignment

Automatic Assignment refers to the matching of transactions, customers, and so on to the criteria set up in each territory (qualifiers) resulting in a "Winning Territory" that receives the customer or transaction.

Catch All

A Catch All territory is a regular territory but it assigned to a territory administrator and its qualifier rules are defined loosely to catch transactions that do not match territories assigned to representatives.

Effective Dates

The date a territory, member assignment, and so on, is effective, or to be in use.

Named Account

A customer organization separated from the territory it qualifies for, such as a geographic territory, and assigned a separate sales resource. Named account territories are only available for the Sales and TeleSales usage.

Number of Winners

The Number of Winners field is used to specify the maximum number of potential winning territories.

Operators

Operators refer to the ability to use arithmetic operators. While defining territories, the qualifier values should be either discrete using operators (for example, =, LIKE) or a range using BETWEEN.

Qualifiers

Qualifiers are seeded criteria used to identify territories. For example, state and country are all qualifiers.

Qualifier Rules

Qualifiers rules define what companies belong in what territories. Examples of qualifiers are state=California and country=USA.

Rank

Rank is a number used to specify the priority of a territory among territory selections. It is used with number of winners. If a company qualifies for three territories but the number of winners can only be one, then the company goes to the territory with the highest rank (lowest number).

Resource Qualifiers

Resource Qualifiers are the criteria used specifically in selecting resources.

Territory

A territory assigns business objects (customers and leads, for example) to resources based on configurable business rules. It defines who owns what.

Territory Group

A set of named accounts directed at a particular line of business. When generated, the territory group becomes a single level territory hierarchy inserted into an existing territory hierarchy.

Top-level Territory

A top-level territory is a territory that has the "Catch All" as a parent, immediately below a territory usage (such as Sales or Service).

Transaction Qualifiers

Transaction Qualifiers are the criteria used to determine the winning territory that receives the transaction.

Winner, or winning territory

The territory that receives the transaction or customer.

Usage

A usage is the module that uses Oracle Territory Management to assign resources, such as Sales or Service.

Part II

User Procedures

This part contains the following chapters:

- [Chapter 3, "Viewing Your Named Accounts \(Sales Representative\)"](#)
- [Chapter 4, "Managing Named Accounts \(Sales Manager\)"](#)
- [Chapter 5, "Using the Territory Lookup Tool"](#)
- [Chapter 6, "Administering Named Accounts \(Administrator\)"](#)
- [Chapter 7, "Creating Territories \(Forms Territory Administrator\)"](#)
- [Chapter 8, "Running Reports in Territory Manager"](#)

Viewing Your Named Accounts (Sales Representative)

This chapter is intended for the sales representative where self-service named account territories are implemented. Sections in this chapter include:

- [Section 3.1, "Overview of Viewing Your Territory Information"](#)
- [Section 3.2, "Viewing Your Named Accounts"](#)
- [Section 3.3, "Searching for a Named Account"](#)
- [Section 3.4, "Using Advanced Search"](#)
- [Section 3.5, "Using the Sales Team Lookup"](#)

3.1 Overview of Viewing Your Territory Information

Sales representatives can search for an account, view a list of all their named accounts, and see who else is on their sales team. The Salesperson page displays a count of the named accounts the salesperson owns.

3.2 Viewing Your Named Accounts

Use this procedure to view a list of all of your named accounts and the related sales teams.

Prerequisites

You are assigned named accounts by your administrator or sales manager.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Named Account

Steps

1. Perform either a simple search (See [Section 3.3, "Searching for a Named Account"](#)) or an advanced search (See [Section 3.4, "Using Advanced Search"](#)).

The list of your named accounts appears.

2. If you want to see more named account information, then click **Show** in the Details column.

The sales team for the named account appears.

3. If you want to see the sales teams for all listed named accounts, then click **Show All**.

The list of named accounts expands to include sales team members.

3.3 Searching for a Named Account

Use this procedure to search for a named account.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Named Account

Steps

1. In the simple search, select one of the following search criteria:
 - Named Account
 - Site Type
 - City
 - State: the full name, not an abbreviation
 - Postal Code
2. Enter one or more characters to search on.
3. Click **Go**.

A list of named accounts that matches your search criteria appears.

3.4 Using Advanced Search

Use this procedure to search for a named account using the advanced search.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Named Account > Advanced Search

Steps

1. In the Named Account page, click **Advanced Search**.
The Advanced Search page appears.
2. Enter one or more search criteria in the fields provided.
3. Click **Go**.

A list of named accounts that matches your search criteria appears.

Guidelines

You can use partial search criteria in fields that do not have drop-down lists or Lists of Values (LOVs).

3.5 Using the Sales Team Lookup

Use this procedure to search for a named account and view the sales team for that account.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Salesperson > Sales Team Lookup

Steps

1. In the Salesperson tab, click **Sales Team Lookup**.
The Sales Team Lookup page appears.
2. Enter criteria to search for the organization. Organization Name and Country fields are required.
3. Click **Search**.
A list of organizations matching the criteria appears.
4. Click the icon in the Sales Team column for the organization.
Information about each person on the sales team appears.

Managing Named Accounts (Sales Manager)

This chapter is intended for the sales manager where the self-service named account territories are implemented. Sections in this chapter include:

- [Section 4.1, "Overview of Managing Named Accounts"](#)
- [Section 4.2, "Viewing Your Named Accounts"](#)
- [Section 4.3, "Using the Sales Team Lookup"](#)
- [Section 4.4, "Assigning the Sales Team to Named Accounts"](#)
- [Section 4.5, "Reviewing Your Account Assignments"](#)

4.1 Overview of Managing Named Accounts

At the beginning of a new selling year, your manager distributes named accounts to his directs including you and other sales managers. Your first action (see [Section 4.2, "Viewing Your Named Accounts"](#) and [Section 4.5, "Reviewing Your Account Assignments"](#)) is to review the accounts assigned to you and decide how you want to distribute them to your salespeople.

You then distribute named accounts to your directs by adding your directs to sales team of one or several named accounts at a time (see [Section 4.4, "Assigning the Sales Team to Named Accounts"](#)).

After assigning the sales team to named accounts, you review the distribution (see [Section 4.5, "Reviewing Your Account Assignments"](#)) and make any necessary adjustments.

4.2 Viewing Your Named Accounts

Use this procedure to view a list of all of your named accounts and the related sales teams.

Prerequisites

You are assigned named accounts by your administrator or sales manager.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Named Account

Steps

1. Perform either a simple search (See [Section 3.3, "Searching for a Named Account"](#)) or an advanced search (See [Section 3.4, "Using Advanced Search"](#)).

The list of your named accounts appears.

2. If you want to see more named account information, then click **Show** in the Details column.

The sales team for the named account appears.

3. If you want to see the sales teams for all listed named accounts, then click **Show All**.

The list of named accounts expands to include sales team members.

4.3 Using the Sales Team Lookup

Use this procedure to search for a named account and view the sales team for that account.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Salesperson > Sales Team Lookup

Steps

1. In the Salesperson tab, click **Sales Team Lookup**.
The Sales Team Lookup page appears.
2. Enter criteria to search for the organization. Organization Name and Country fields are required.
3. Click **Search**.
A list of organizations matching the criteria appears.
4. Click the icon in the Sales Team column for the organization.
Information about each person on the sales team appears.

4.4 Assigning the Sales Team to Named Accounts

You can assign a sales team to one or more named accounts at a time. Use this procedure to add or remove salespeople from one or more named accounts.

Prerequisites

You are the sales manager for an existing territory group that contains named accounts.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Named Account

Steps

1. Perform either a simple search (See [Section 3.3, "Searching for a Named Account"](#)) or an advanced search (See [Section 3.4, "Using Advanced Search"](#)).

A list of named accounts appears.

2. In the Select column, select one or many named accounts to update.
3. Click **Update Sales Team**.

The Update Sales Team page lists the selected accounts.

4. If you want to add a salesperson to the sales team, then perform the following steps in the Add Salesperson section:
 - a. Use the LOV to select the salesperson.
 - b. Select the sales group from the LOV.
 - c. Select the sales role from the LOV. Only sales roles that are associated to the territory group that contains the named account appear in the LOV.
 - d. If you want the salesperson added to subsidiaries of the selected named account, then select **Add to Subsidiaries**.
 - e. If you want to add another salesperson, then click **Add Another Row** and repeat from step a.
5. If you want to remove a salesperson from the sales team, then perform the following steps in the Remove Salesperson section:
 - a. Use the LOV to select the salesperson.
 - b. Select the salesperson's sales group from the LOV.
 - c. Select the salesperson's sales role from the LOV.
 - d. If you want the salesperson removed from subsidiaries of the selected named account, then select **Remove from Subsidiaries**.
 - e. If you want to remove another salesperson, then click **Add Another Row** and repeat from step a.
6. Click **Apply**.

Your changes are saved.

Guidelines

In order to remove a salesperson from the sales team you must select the exact salesperson, group, and role combination that is on the sales team.

4.5 Reviewing Your Account Assignments

Use this procedure to view a summary of your salespeople and how your named accounts are distributed.

Prerequisites

The territory group was set up by your administrator

You are assigned to a set of named accounts by the administrator or by a senior sales manager

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Salesperson

Steps

1. Select the Salesperson subtab.

The Named Account Distribution page lists your salespeople and the number of named accounts assigned to each. It also provides the total number of accounts you own and the number of accounts that are unassigned.

4.6 Transferring Named Accounts

Use this procedure to transfer a named account from one salesperson or sales team to another.

Prerequisites

A named account exists, belongs to you, and is assigned to a salesperson.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Named Account

Steps

1. Perform either a simple search (See [Section 3.3, "Searching for a Named Account"](#)) or an advanced search (See [Section 3.4, "Using Advanced Search"](#)).
A list of named accounts appears.
2. In the Select column, select one or many named accounts to transfer.
3. Click **Update Sales Team**.
The Update Sales Team page lists the selected accounts.
4. Remove the existing salesperson or sales team.
5. Add the new sales team. If you do not add a new salesperson or sales team and have deleted all of the existing sales team, then you (the sales manager) remain assigned to the named account.
6. Click **Apply**.
The transfer is saved.

Using the Territory Lookup Tool

This chapter covers the following topics:

[Section 5.1, "Overview of Using the Territory Lookup Tool"](#)

[Section 5.2, "Finding a Salesperson Using the Lookup Subtab"](#)

[Section 5.3, "Finding a Salesperson Using the Lookup by Organization Subtab"](#)

[Section 5.4, "Finding a Salesperson Using the Advanced Lookup Subtab"](#)

5.1 Overview of Using the Territory Lookup Tool

Use the Territory Lookup Tool to find:

- An organization
- A sales representative

The HTML based Territory Lookup Tool returns the names of the sales representatives who are defined under the Sales and Telesales usage. It searches down the territory hierarchy to find the resources of the winning territories.

Note: In the Organization field, you can use a wild card with at least two letters.

In the Territory Lookup tab, there are three ways to search for information that are based on the responsibility described in the following table:

Territory Lookup Tool Access Privileges

Responsibility Name	Lookup Subtab	Lookup by Organization Subtab	Advanced Lookup Subtab
Territory Lookup User	Yes	No	No
Territory Lookup Intermediate User	Yes	Yes	No
Territory Administration HTML	Yes	Yes	Yes

5.2 Finding a Salesperson Using the Lookup Subtab

Perform the following steps to look up a customer’s assigned sales representatives.

Note: This subtab uses the following qualifiers which aid in the search:

- Country Code transaction qualifier (Country field)
 - Postal Code transaction qualifier (Postal Code field)
 - Customer Name Range transaction qualifier (Organization field)
-
-

Prerequisites

- Customer Name Range, Country Code and Postal Code qualifiers are enabled.
- Create the necessary territories using the appropriate enabled transaction qualifiers.
- Acquire the appropriate responsibilities

Responsibilities

- Territory Lookup User
The Territory Lookup User responsibility allows you access to the Lookup subtab only.

Navigation

Navigate to the Territory Lookup window.

Steps

1. Enter your user ID and password and click **Go**.

The Territory Lookup window opens.

2. (Optional) Enter the organization name in the Organization field. You can use two wildcards after entering one letter. For example, A%%.
3. Select the country from the drop-down menu.
4. Enter the complete postal code.
5. Select **Lookup**.

The results will be listed at the bottom of the window. The results include columns which display the salesperson's name, role, job title, phone number, e-mail address, manager's name, manager's phone number, territory name, and top level parent territory.

5.3 Finding a Salesperson Using the Lookup by Organization Subtab

If you don't know the postal code of the company of which the sales representative belongs to, then use the Lookup by Organization subtab to find the name of the company.

This subtab uses the following criteria:

- Customer Name in the Organization field
- (Optional) State in the State/Province field
- (Optional) Country in the Country field
- (Optional) Postal Code transaction qualifier in the Postal Code field

Searching for salespersons is a two-step process. First you search for your organization which is based on the TCA model and will return all values that match your criteria in the Results region. Then click **Lookup** for the desired organization which is based on sales account transaction qualifiers.

Prerequisites

- Enable qualifiers
- Create the necessary territories
- Acquire the appropriate responsibilities

Responsibilities

- Territory Lookup Intermediate User

The Territory Lookup Intermediate User responsibility allows you access to the following subtabs:

- Lookup subtab
- Lookup by Organization subtab

Note: The Territory Administration HTML responsibility also allows you access to the Territory Report tab to run the Territory Definitions Report (HTML) and Territory Changes Report (HTML).

Navigation

Navigate to the Territory Lookup window.

Steps

1. Enter your user ID and password and click **Go**.

The Territory Lookup window opens.

2. Select the Lookup by Organization subtab.

The Territory Lookup by Organization window opens.

3. Enter the name of the company in the Organization field. You can use wildcards to aid your search.
4. (Optional) Select the state from the State/Province drop-down menu.
5. (Optional) Select the country from the Country drop-down menu.
6. (Optional) Enter complete postal code in the Postal Code field.
7. Click **Go**.

The results will be listed at the bottom of the window. The results list the matching organizations and addresses.

8. If you see your selection listed, click **Lookup** in the matching column.

The Territory Lookup Results window opens displaying the salesperson's name, role, job title, phone number, e-mail address, manager's name, manager's phone number, territory name, and top level parent territory.

If you do not see your selection listed, you can either scroll to the bottom of the page and use the navigation links, or perform another search.

5.4 Finding a Salesperson Using the Advanced Lookup Subtab

The Territory Lookup Tool, with the Territory Administration HTML responsibility, has a dynamic window format that requires no customizing. It dynamically displays the enabled account qualifiers for sales that are selected in Territory Manager. Use the advanced search to search for territories using specific criteria.

Note: The organization field uses the Customer Name Range transaction qualifier and NOT the Customer Name transaction qualifier.

Prerequisites

- Enable qualifiers
- Create the necessary territories using at least one qualifier
- Acquire the appropriate responsibilities

Responsibilities

- Territory Administration HTML

The Territory Administration HTML responsibility allows you access to the following subtabs:

- Lookup subtab
- Lookup by Organization subtab
- Advanced Lookup subtab

Note: The Territory Administration HTML responsibility also allows you access to the Territory Report tab to run the Territory Definitions Report (HTML) and Territory Changes Report (HTML).

Navigation

Navigate to the Territory Lookup window.

Steps

1. Enter your user ID and password and click **Go**.

The Territory Lookup window opens.

2. Select the Advanced Lookup subtab.

The Advanced Lookup window opens.

3. Enter your search criteria in any of the following fields.

- Organization (corresponds to the Customer Name Range qualifier)
- Country (from the drop-down menu)
- State (from the drop-down menu)
- Province (from the drop-down menu)
- Postal Code
- County
- Area Code
- Customer Category (from the drop-down menu)
- Company Annual Revenue
- SIC Code
- Number of Employees
- City

4. Select **Lookup**.

The results will be listed at the bottom of the window. The results list the matching organizations and addresses.

5. If you see your selection listed, click **Lookup** in the matching column.

The Territory Lookup Results window opens displaying the salesperson's name, role, job title, phone number, e-mail address, manager's name, manager's phone number, territory name, and top level parent territory.

If you do not see your selection listed, you can either scroll to the bottom of the page and use the navigation links, or perform another search.

Administering Named Accounts (Administrator)

This chapter is intended for the sales territory administrator. Sections in this chapter include:

- [Section 6.1, "Overview of Administering Named Accounts"](#)
- [Section 6.2, "Reviewing the Named Account Sales Team"](#)
- [Section 6.3, "Creating Territory Groups"](#)
- [Section 6.4, "Updating Territory Groups"](#)
- [Section 6.5, "Deleting Named Accounts from Territory Groups"](#)
- [Section 6.6, "Deleting Territory Groups"](#)
- [Section 6.7, "Defining Named Account Assignment Rules"](#)
- [Section 6.8, "Monitoring the Named Account Setup Process"](#)
- [Section 6.9, "Using the Sales Team Lookup"](#)

6.1 Overview of Administering Named Accounts

Named accounts are centrally defined, associated to sales groups, and distributed from the top down to individual salespersons.

A company can have multiple sales forces each with their own roles, exception handling rules, sales hierarchies, and sets of named accounts. These are loosely associated to territory groups. Planning considerations should be evaluated in the determination of territory groups.

The administrator creates named account territory groups by associating organizations to the territory group. The act of associating organizations to a territory group elevates an organization to a named account. An account that falls within the definition, and any leads or opportunities for accounts that match the definition, all belong to the defined named account.

Territory groups are associated to sales groups within the sales hierarchy and distributed top down to individual salespeople.

Greater named account accuracy is achieved through a division of tasks to the most appropriate user. Territory administrators are responsible for centrally managing territory groups and defining named accounts. Sales management is responsible for assigning named accounts down the sales hierarchy.

Behind the scenes, a concurrent program generates a set of sales territories similar to those created manually in the Oracle Territory Management Forms windows. The application generates territories for each named account utilizing the definitions (customer name range and postal code values) maintained by territory administrators and assigns salespersons as defined by sales management. This generation is part of the *Generate Territory Packages* concurrent program used to enable territories.

The generated named account territories are frozen and cannot be updated in the Forms user interface.

6.2 Reviewing the Named Account Sales Team

Use this procedure to view the sales team for one or more named accounts.

Prerequisites

Named accounts must exist.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Named Account

Steps

1. Perform either a simple search (See [Section 3.3, "Searching for a Named Account"](#)) or an advanced search (See [Section 3.4, "Using Advanced Search"](#)).
The list of named accounts appears.
2. If you want to view the sales team for a named account, then click **Show** next to the named account name.
3. If you want to see sales team information for all named accounts in the list, then click **Show All**.

6.3 Creating Territory Groups

A territory group is a group of named accounts. You designate sales roles for each territory group and define what access each sales role has to accounts, leads, and opportunities. Use this procedure to create a territory group and designate specific organizations as named accounts within the territory group.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Territory Group

Steps

1. In the Territory Group page, click Create Named Account Territory Group.
The Create Territory Group page appears.
2. Enter a name for the territory group.
3. Select the parent territory from the LOV. This places the territory group into the hierarchy of physical territories created in the Forms administration windows.
Details for the selected named account appear.

4. Enter a rank for the territory group. This is the rank of the node created below the parent territory specified in step 3.
5. Enter a start date for the territory to be active.
6. Optionally, enter an end date after which the territory group becomes inactive.
7. Click **Next**.

The Define Role Access page appears.

8. Perform the following steps to assign roles and define the access for each role in the territory group.

- a. Use the LOV to select a role from CRM Resources.
- b. Select the access types for the role. Choices are account, lead, and opportunity. The choices are limited by the access types available to the parent territory.

- c. If the role has lead or opportunity access types, then you can specify product categories. Click the icon in the Product Category column.

The Select Product Categories page appears.

- d. If you are specifying product categories, then use the LOV to select a product category.
- e. If you want to select additional product categories, then click **Add Another Row** and repeat step d.
- f. When you have completed adding product categories to the role click **Apply**.

The Define Role Access page appears.

- g. If you want to add additional roles, then click **Add Another Row** and repeat from step a.
- h. Click **Next**.

The Setup Rules page appears.

9. The territory group acts as a catch all territory for any transactions that match the account name but do not fit the named accounts within the territory group. Choose the resource from the LOV who owns the catch all records and optionally enter the name of a workflow for catch all transactions.

10. Click **Next**.

The Assign Sales Management page appears.

11. Choose the name, group, and role for the top of the sales management hierarchy for this territory group. That manager in turn can assign accounts to sales organizations or salespeople in his sales hierarchy.

12. Click **Next**.

The Add Organizations page appears.

13. Perform a search of the organizations to find the organizations you want to add to the territory group.

The organizations that match your search criteria appear on the page.

14. In the Select column, select each organization to be added to the territory.

15. Click **Add to Territory Group**.

The selected organizations appear in the territory group list at the bottom of the page.

16. If you want to add more organizations, then repeat from step 13.

17. Click **Finish**.

The Territory Group page displays the list of territory groups and the number of named accounts in each territory group reflects the changes you made. The organizations you selected become named accounts.

Behind the scenes, a concurrent program generates a set of sales territories similar to those created manually in the Oracle Territory Management Forms windows. The application generates territories for each named account utilizing the definitions (customer name range and postal code values) maintained by territory administrators and assigns salespersons as defined by sales management. These territories are organized as children of a territory representing the territory group.

6.4 Updating Territory Groups

Use this procedure to review details for a territory group and make changes, such as adding organizations to the territory group.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Territory Group

Steps

1. Select the Territory Group tab.
A list of territory groups appears.
2. If you want to view details for a territory group, then perform the following steps:
 - a. Click the territory group name.
The Territory Group Details page displays all details for the selected territory group.
 - b. Click **Return to Territory Group**.
3. Click the Update icon next to the territory group you want to change.
The Create Territory Group page appears.
4. Step through each page using the Next button and make your changes. (See [Section 6.3, "Creating Territory Groups"](#) for details about these pages.)

6.5 Deleting Named Accounts from Territory Groups

Use this procedure to delete one or more named accounts from a territory group.

Prerequisites

At least one territory group exists with a named account.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Named Account

Steps

1. Perform either a simple search (See [Section 3.3, "Searching for a Named Account"](#)) or an advanced search (See [Section 3.4, "Using Advanced Search"](#)).
A list of your named accounts appears.
2. In the Select column, select one or more named accounts to delete.
3. Click **Delete from Territory Group**.

6.6 Deleting Territory Groups

Use this procedure to delete a territory group.

Prerequisites

At least one territory group exists.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Territory Group

Steps

1. View your list of territory groups in the Territory Group tab.
2. Click **Delete** for the territory group you want to delete.
The Confirmation page appears.
3. Click **Yes** to delete the territory group.

6.7 Defining Named Account Assignment Rules

Territory administrators are responsible for the centralized management of qualifier rules for named accounts. You can use a range of customer keynames and postal codes to ensure that any records that fall within those rules are identified with a named account. Use this procedure to define the assignment rules related to a specific named account.

Prerequisites

At least one territory group exists with a named account.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Named Accounts

Steps

1. Perform either a simple search (See [Section 3.3, "Searching for a Named Account"](#)) or an advanced search (See [Section 3.4, "Using Advanced Search"](#)).
A list of your named accounts appears.
2. In the Select column, select one named account to map.
3. In the Map column, click the Update Mapping icon to define assignment rules.
The Map page appears.
4. Enter a customer keyname. The keyname is the qualifier used to search for accounts in the database that belong in the territory with the named account. The default is the business name followed by the trade name.
5. If you want to enter more than one keyname qualifier, then click **Add New Row** and repeat step 6.
6. Enter a range of postal codes to further qualify the accounts that match the keyname.

7. If you want to enter more than one postal code qualifier, then click **Add New Row** and repeat step 8.
8. To prevent overlapping named account territories, ensure there are no conflicts by performing the following steps:
 - a. Click **Select All** and click **Show Conflicts**.

The Map page lists conflicting named accounts and their overlapping qualifier rules.
 - b. If conflicts appear, then tighten or loosen the named account qualifier rules to avoid conflicts.
 - c. Return to the definition page.
9. Click **Apply**.
10. If you want to preview what organizations match your qualifiers, then click **Mapped Organizations**. Return to the definition page.

Guidelines

The concurrent program Generate Territory Packages must be run for your territory changes to be effective.

After the concurrent program Generate Territory Packages is run, leads, opportunities, or accounts that fall within the named account assignment rules you created will be assigned to the named account and the related territory.

6.8 Monitoring the Named Account Setup Process

Use this procedure to check the status of named accounts.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Dashboard

Steps

1. Select the Dashboard subtab.

The dashboard lists the territory groups, the number of named accounts in each territory group, and the percentage of named accounts that are mapped and the percentage that are assigned to salespeople. It also provides a count of the number of accounts, leads, and opportunities that are in the catch alls.

2. If you want to review named accounts that are not mapped, then go to the Named Accounts tab and perform a search.

6.9 Using the Sales Team Lookup

Use this procedure to search for a named account and view the sales team for that account.

Prerequisites

None

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Dashboard > Sales Team Lookup

Steps

1. In the Salesperson tab, click **Sales Team Lookup**.

The Sales Team Lookup page appears.

2. Enter criteria to search for the organization. Organization Name and Country fields are required.
3. Click **Search**.

A list of organizations matching the criteria appears.

4. Click the icon in the Sales Team column for the organization.

Information about each person on the sales team appears.

Creating Territories (Forms Territory Administrator)

This chapter is intended for the territory administrator. Sections in this chapter include:

- [Section 7.1, "Overview of Creating Territories"](#)
- [Section 7.2, "Qualifiers"](#)
- [Section 7.3, "Territory Hierarchies"](#)
- [Section 7.4, "Territory Winning Rules"](#)
- [Section 7.5, "Creating Individual Territories"](#)
- [Section 7.6, "Entering Transaction Qualifiers"](#)
- [Section 7.7, "Entering Resource Qualifiers"](#)
- [Section 7.8, "Specifying Resources for a Territory"](#)
- [Section 7.9, "Adding Subterritories"](#)

7.1 Overview of Creating Territories

A territory defines who owns what. The who is the resources assigned to the territory. The what is the business object, such as leads, service requests, customers, and delinquencies. Qualifiers are used to define both.

7.2 Qualifiers

There are two types of qualifiers that help define a territory: Transaction Qualifiers and Resource Qualifiers. A qualifier also consists of three components: name, operator, and value. The following table describes each component:

Table 7–1 Qualifier Components

Components	Description
Name	The name of the qualifier. It can be postal code, item, task priority, request status, job title, or others.
Operator	Use operator to connect a qualifier name and its values to make a qualifier meaningful. The operator's list of values (LOV) depends on the data type of the qualifier. Possible values are =, < >, >, <, >=, <=, Like and Between. The default value for this field is "=".
Value	The selection from the LOV in this field is based on the selected qualifier. For example, the LOV for the request status qualifier can be Open or Closed. If the qualifier is area code, then manually enter this field, for example, 408, 415, and so on.

7.2.1 Transaction Qualifiers

Transaction Qualifiers are used to specify the criteria about how the territory module assigns resources to transactions. It is the first key decision point when Assignment Manager tries to assign resources to a document or a task.

For example, use area code, postal code, company name, or opportunity channel as the criteria to help assign qualified resources for transaction needs.

Different territory usages, like Oracle Sales or Service, use different sets of transaction qualifiers and those transaction qualifiers are grouped by transaction type. For example, a sales or telesales territory has three predefined transaction types: Account, Lead, and Opportunity. Some examples of transaction qualifiers within the Account Transaction Type are company name, area code, and postal code. Opportunity channel is one transaction qualifier for the Opportunity Transaction Type.

Note: You must enable transaction qualifiers before using them.

7.2.1.1 Sample List of Seeded Transaction Qualifiers

Territory Manager includes seeded qualifiers for the following CRM modules:

- Oracle Defect Management
- Oracle Sales and Marketing
- Oracle Service
- Oracle Trade Management
- Oracle Service Contracts
- Oracle Collections

The following table describes a small sample of both resource and transaction qualifiers. Application types and qualifier types are not customizable.

Example of Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Defect Management	Defect Transactions	Product
Sales	Account	Customer Name Range
Trade Management	Trade Account	State
Service	Service Request	Request Type

7.2.1.2 Customer Name and Customer Name Range

Among all the transaction qualifiers, there are three which should be explained to avoid confusion:

- Customer Name
- Customer Name Range

Customer Name

This transaction qualifier defines a customer name.

Customer Name Range

In contrast to a Customer Name qualifier, a Customer Name Range qualifier is used to indicate more than one customer (or customer names) by entering appropriate values. This qualifier captures a range of the business names.

Example

Business World Worldwide has the following branches and subsidiaries: Business World Motor, Business World Book, Business World Service, USA Business World,

Russia Business World, and UK Business World. You can use the Customer Name Range qualifier to group similar customer names together by using the following values:

Like “Business World%”: This value represents Business World Motor, Business World Book, and Business World Service.

Between “A% Business World” to “Z% Business World”: This value represents USA Business World, UK Business World, and Russia Business World.

7.2.2 Resource Qualifiers

Resource Qualifiers specify what attributes are used to select the individuals responsible for those transactions. Examples include job title, competence, and language. These qualifiers act as filters which define resource selections.

For example, if you are looking for specific resources who speak Italian for your customer needs, then the resource qualifier can be identified as “Language = Italian.” This aids in selecting resources that qualify for your condition.

You can still make selections from the qualified resources suggested by the resource qualifier before assigning them to a territory.

Resource qualifiers are available for:

- Oracle Sales and TeleSales
- Oracle Service
- Oracle Defect Management
- Oracle Trade Management

Resource qualifiers are not used for assignment. They help you pick a resource to add to the territory. You can achieve the same end by clicking the Resource LOV in the Resources tab of the Territory Details window.

7.2.3 Using Qualifiers

Why Use Transaction and Resource Qualifiers?

After understanding the concepts of transaction qualifiers and resource qualifiers, it is easier to understand how a territory works. A territory optionally uses resource qualifiers to filter resources that you want to attach to a territory. A territory uses transaction qualifiers and values to determine if a territory can win in that

transaction. If the territory happens to win, then the resources attached to the territory can be assigned to the transaction.

7.2.3.1 Seeded Qualifiers

Territory Manager provides a large number of seeded qualifiers for Oracle Defect Management, Oracle Sales and Marketing, Oracle Service, Oracle Collections, and Oracle Trade Management.

7.3 Territory Hierarchies

The purpose of having territory hierarchies is to make the territory assignments and searches more efficient. Territory hierarchies also have the ability to store the parent-child relationship among territories.

Parent-Child Territory

Any territory consisting of one or more subterritories is considered as a parent territory. For example, a West Coast territory could consist of three subterritories: Washington, Oregon, and California. This West Coast territory and the three subterritories have the parent-child relationship.

Features of a Child Territory (Subterritory)

To help maintain integrity in the hierarchy, each child territory logically inherits the qualifiers and values of the parent territory. Also, additional qualifiers and values can be added.

7.4 Territory Winning Rules

Territory Manager uses the Number of Winners field set to the top level of territory hierarchy to determine the winning territories. This field cannot be entered if it is not the top level territory.

Territory winning rules are used in several different ways in the Oracle E-Business Suite. For example, Oracle Service tends to enter ONE in the Number of Winners field, which helps to select the most qualified resources for the service requests.

Multiple winners are commonly used in Oracle Sales to meet the business needs, but a single winner is also used in Sales. If the Number of Winners field is not set, then the number of winning territories defaults to one for the hierarchy under that top-level territory.

There are two possible outcomes based on values entered in the Number of Winners field:

One Winner

If you enter 1 in the Number of Winners field in the Overview tab, then Territory Manager assigns the transaction to a single territory in the territory hierarchy.

Use the territory ranking mechanism for breaking ties between winning territories. The highest rank of competing territories (which is represented by a lower number) wins against the lowest rank of the territories (which would be the higher number) in the territory hierarchy.

Multiple Winners

If you enter a number greater than 1 in the Number of Winners field in the Overview tab, then Territory Manager assigns a transaction to multiple qualifying territories.

Use the Number of Winners field to limit the number of winning territories. However, if there are three territories that qualify for the criteria, but it can only have two winners, then ranking determines the final two winners among the three territories.

Note: Only active territories that have resources attached can be winning territories.

Rank

Rank is used to specify the priority of a territory among multiple winners. The choice is only random if no rank has been defined. The lowest rank of competing territories wins at the same level in the hierarchy. For example, from rank 1 to 10 for the same hierarchy level, rank 1 has the highest priority.

Example

The following example shows how zip codes are used to set up three overlapping territories:

Territory 1: zip code Between 90001 and 90051

Territory 2: zip code Between 90020 and 90070

Territory 3: zip code Between 90049 and 90052

Note that the transaction value: zip code = 90050

The previous three territories are all qualified for this transaction. If the Number of Winners is set to ONE, then the single winning territory in the following both situations is:

- Condition A:
 - Territory 1: Rank 2
 - Territory 2: Rank 3
 - Territory 3: Rank 2

Winner can be either Territory 1 or Territory 3.

Reason: Any territory with rank 2 can be the winner. The Assignment Manager selects Territory 1 or Territory 3 randomly.

- Condition B:
 - Territory 1: Rank 3
 - Territory 2: Rank 2
 - Territory 3: Rank 4

The winner is Territory 2.

Reason: The territory with rank 2 wins over the territories with rank 3 and 4.

7.5 Creating Individual Territories

You can create a stand-alone territory by entering territory qualifiers and their values directly. You can also select the territory that serves as a parent to the new territory and right-click to select New from the pop-up menu.

Prerequisites

- There must be a territory plan in place.
- All the transaction qualifiers used in territory creation are enabled.

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration > Administration > Define Territory

Right-click the parent territory from the Tree Navigator and select New

Steps

1. In the Overview tab, select an appropriate organization in the Organization field if multiple organization (Multi-Org) is considered while creating territories.

Note: When multiple organization is considered while creating territories, use the Organization field to identify the appropriate level for your territory creation. You can create territories at the top organization level (Vision Corporations) or at a specific operating unit level. For example, use the “MO: Operating Unit” profile option to set at the responsibility level that the territory administrator has logged in with.

2. Use the list of values (LOV) in the Usage field to select the type of application that will use this territory. Your selection limits the types of qualifiers that can be used in the territory definition.
3. Enter a name and description for the territory.
4. To limit the time the territory is effective, enter the Start and End Dates. By default the territory become effective on the date that you create it.
5. (Optional) Verify that the parent territory is the territory you selected in the Navigator. If this is not the parent territory, then use the LOV to select the appropriate parent territory.
6. Enter an appropriate rank in the Rank field.
7. Enter an appropriate number in the Number of Winners field.
8. (Optional) If you have created an escalation territory for this territory, then enter it using the LOV in the Escalation field.
9. (Optional) If you want to use an existing territory type to create this territory, then use the LOV to enter it in the Type field.

Note: If you use a territory type, then you are restricted to using the qualifiers set up in that territory type.

10. Use the Transaction Types LOV to select one or more types of transactions based on the territory usage. Note that some application types allow you only one transaction type.
11. Leave the **Freeze** check box unchecked.
12. Click **Save** from the toolbar to save the territory overview information.

Guidelines

Relationship Between Usage, Transaction Types, and Transaction Qualifiers

The territory usage is tied to the application, such as Sales and TeleSales, Service, or Trade Management. Each application uses its specific sets of transaction qualifiers for their unique business needs and these transaction qualifiers are grouped by transaction type.

For example, a territory created for Sales and TeleSales usage has three seeded transaction types: account, lead, and opportunity. While a territory created for Service usage can only see task, service request, as well as “task and service request” shown in the Transaction Type field.

Note: Opportunity and Lead are considered a superset of the Account qualifiers. Therefore, the account-related transaction qualifiers, such as Postal Code and State, are available even if the account transaction type is not selected by Oracle Sales and TeleSales.

If task transaction type is selected in a service territory (Service usage), then you can only see the task related transaction qualifiers, such as task type, status, and priority shown in the Transaction Qualifier name list of values.

Therefore, territory usage limits the selection for transaction types, and the selection of transaction qualifiers is based on the selected transaction types.

Territory Winning Rules

Oracle Territory Management uses the Number of Winners field (only set at the top level of a territory hierarchy, such as the top-level territory directly under Oracle

Service) to determine the number of winning territories. This field is protected if it is not the top-level territory and an error message appears if you attempt to enter a value when it is not appropriate.

Rank is used to specify the priority of a territory among multiple winners. The choice is only random if no rank has been defined. The lowest rank of competing territories wins at the same level in the hierarchy. For example, for rank 1 to 10 for the same hierarchy level, rank 1 has the highest priority.

7.6 Entering Transaction Qualifiers

Use the Transaction Qualifiers tab to enter transaction qualifier names and their values based on the transaction types selected in the Overview tab.

Transaction qualifiers are criteria used to determine the winning territory (the territories win among competitive territories). This is the first major decision point when the Assignment Manager tries to assign resources to a task.

Transaction qualifiers serve as the “if” clause. If an object qualifies for a territory, then the resource assigned to the qualified territory will be selected for a transaction (a service request, or task). For example, use area code, postal code, company name, or opportunity channel as the criteria for a transaction to determine winning territories first. Then the resources assigned to the winning territories can be assigned for the transaction.

Prerequisites

- There must be a territory plan in place.
- All the transaction qualifiers used in territory creation are enabled.
- The territory overview information is saved

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration > Administration > Define Territory

Double-click the territory in the Tree Navigator

Steps

1. (Optional) If this territory is part of a hierarchy of territories, then in the Transaction Qualifiers tab click **Show Inherited Qualifiers** to examine which qualifiers this territory has inherited from its parent territory or territories.
2. In the Name field enter the qualifier name you are going to use in the Transaction Qualifiers region. The transaction type populates automatically in the Type field for the selected qualifier name.
3. If you have used a territory type to create this territory, then the qualifiers are already prefilled.
4. If you want to enter overlapping values for a qualifier, then check the **Overlap Allowed** check box. If not checked, the application checks for overlapping qualifier values under the same parent territory.
5. Enter at least three letters to bring up the LOV in the Value From and Value To fields. For example, enter "Bus" to launch the LOV starting with "Bus". If wildcard "%" is used, then use it with letters, such as "B%%", or "%%%" to query the list of values.
6. Click **Save** from the toolbar to save the transaction qualifier information.

Note: The **Next Value Set**, and **Mass Create Territories** buttons, as well as the Mode field are used only in territory templates.

7.7 Entering Resource Qualifiers

Optionally use the Resource Qualifiers tab to filter qualifying resources in a territory if you don't know exactly which resources you are going to use for a territory. This aids in determining which resources you want to assign to the territory during territory creation.

For example, use "Job Title = Manager" to help you identify resources with manager title if you don't know the exact names of those who have manager's job titles when defining a territory.

After the resource qualifiers are identified, you can click the Auto Assign Resources button in the Resources tab to retrieve qualified resource names based on the resource qualifiers.

Note: Resource qualifiers are criteria that are used specifically for resource selections while defining territories. They are not used in determining which territory wins among competition for a transaction. That is determined by the transaction qualifiers.

You do not need to enter this tab if you know exactly which resources you want to use while creating your territory.

Unlike transaction qualifiers, the availability of the resource qualifiers is not limited by the usage and transaction types that you chose for a territory.

Prerequisites

- There must be a territory plan in place.
- All the transaction qualifiers used in territory creation are enabled.
- The territory overview information is saved

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration > Administration > Define Territory

Double-click the territory in the Tree Navigator

Steps

1. Use the LOV in the Name field to choose an appropriate qualifier name (such as "Resource Type") for the territory.
2. Use the LOV in the Operator field (such as "=") and Value field (such as "Employee Resource") to make the appropriate selections.
3. Click **Save** from the toolbar to save the resource qualifier information.

Note: The **Next Value Set**, and **Mass Create Territories** buttons, as well as the Mode field are used only in territory templates.

7.8 Specifying Resources for a Territory

Use the Resources tab to specify resource information in a territory. It is important to use this tab because only territories that have resources attached to them can be winning territories. Therefore, after a resource is added to a territory for the first time, you must run the Generate Territory Packages concurrent program. Resources assigned to territories in this tab can be any CRM resource defined in the Resource Manager. They can be employees, salespeople, groups, teams, parties, partners, and supplier contacts.

There are two ways to identify resources while defining a territory.

Manually Assign Resources: This is used if you know exactly which resources you are going to assign to a territory. You do not need to use the Resource Qualifiers tab to guide you for the resource selection. Instead, use the Resources tab to enter the resource in the Name field. The resource type populates automatically.

Auto-Assign Resources: This is used if you do not know the resources that you want to assign to a territory, or you may have a large pool of potential names.

Prerequisites

- There must be a territory plan in place.
- All the transaction qualifiers used in territory creation are enabled.
- The territory overview information is saved

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration > Administration > Define Territory

Double-click the territory in the Tree Navigator

Steps

1. **If the Resource Qualifiers tab is not used (Manually Assign Resources):** Use the list of values (LOV) to enter the resources in the Name fields if you know exactly which resources used in this territory.
2. **If the Resource Qualifiers tab is used (Auto-Assign Resources),** then perform the following steps:
 - a. Click **Auto Assign Resources** if resource selection criteria are entered in the Resource Qualifiers tab.

The Qualifying Resources window displays a list of people that fit the resource qualifier's values you have entered.
 - b. Select the people you want to assign to this territory by checking the **Assign** check box next to their names.
 - c. Click **OK** and return to the Resources tab.

Note: If no people or the wrong people are found, then go back to the Resource Qualifiers tab and enter a different set of resource qualifier values, or select resources manually in the Resources tab.

3. Check the **Primary Contact** check box next to the resource who becomes the primary contact for the territory.
4. For each resource you can add start and end dates to limit their participation.
5. For each resource, select the transaction types you want them to access in the Access Type field.

For example, if the selected access type for John Walsh is Service Request, then John can be assigned only to a job related to a service request, and he cannot be assigned to a task or to a task created within a service request.

6. Click **Save** from the toolbar to save the resource information.

Note: Full Access: This check box is used only in Sales and TeleSales. If this box is checked, the resource has full access to the transaction type you specified in the Access Type field. For example, if the access type is Lead, the resource can be assigned only to Lead and Account. The resource cannot be assigned to an Opportunity.

7.9 Adding Subterritories

Use this procedure if your territory hierarchy includes territories under the current territory.

Prerequisites

- There must be a territory plan in place.
- All the transaction qualifiers used in territory creation are enabled.
- The territory overview information is saved

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration > Administration > Define Territory

Double-click the territory in the Tree Navigator

Steps

1. Click **New Subterritory** and repeat the territory creation procedure for the new sub-territory.
2. Click **Save** from the menu.

Running Reports in Territory Manager

This chapter covers the following topics:

- [Section 8.1, "Overview of Running Reports in Territory Manager"](#)
- [Section 8.2, "Territory Definition Report \(Forms\)"](#)
- [Section 8.3, "Territory Changes Report \(Forms\)"](#)
- [Section 8.4, "Territory Definition Report \(HTML\)"](#)
- [Section 8.5, "Territory Changes Report \(HTML\)"](#)

8.1 Overview of Running Reports in Territory Manager

The administrator runs reports to monitor territory details and changes in territories.

8.2 Territory Definition Report (Forms)

Run the Territory Definition Report to see a list of each territory, including transaction types, qualifier conditions, resources, and resource access information.

Note: If you want to view your report as a spreadsheet, it is faster to verify your selection in HTML and then export it to Microsoft Excel.

Perform the following steps to retrieve specific territory information based on certain criteria, such as a specific resource or a transaction qualifier.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Reports > Territory Definition Report.

Steps

1. Navigate to the Territory Definition Report window.
The Territory Report window opens.
2. Select Output Format from the drop-down menu.
Choose either HTML or Excel.
3. Select Sales Representatives from the drop-down menu.
4. Select Qualifiers from the drop-down menu and click **OK**.

8.3 Territory Changes Report (Forms)

Perform the following steps to trace territory change information for a specific period of time. This report displays your updated territory information but does not show the differences from what existed before any changes were made. It also will only show changes that were done in the Overview tab.

Prerequisites

None

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Reports > Territory Changes Report

Steps

1. Navigate to the Territory Changes Report window.

The Territory Changes Report window opens.

2. Select Output Format from the drop-down menu.
Choose either HTML or Excel.
3. Enter values for the Earliest Change Date and the Latest Change Date.
4. Click OK.

8.4 Territory Definition Report (HTML)

Perform the following steps to retrieve specific territory information based on certain criteria, such as a specific resource or a transaction qualifier. To narrow your search, you can additionally select from the resource and qualifiers that are associated from that usage.

Prerequisites

None

Responsibilities

- Territory Lookup Intermediate User
- Territory Administration HTML

Use the Territory Lookup Intermediate User responsibility and the Territory Administration HTML responsibility to access the Territory Report tab in addition to the Territory Lookup tab.

Navigation

Navigate to the Territory Lookup window.

Steps

1. Enter your user ID and password and click **Go**.
The Territory Lookup window opens.
2. Select the Territory Report tab.
The Definitions report window opens.
3. From the drop-down list in the Usage field, make your selection.
4. To refine your report, use the drop-down lists in the Resource and Qualifier fields.

5. In the Active On field, either keep the default date (current date) or click the Date Picker to select the desired date.
6. Click **View Report**.

The Territory Definitions window displays your requested data.

Note: You can click on the Comma Separated Format icon to download your report in a Microsoft Excel format.

8.5 Territory Changes Report (HTML)

Perform the following steps to trace territory change information for a specific period of time. This report displays your updated territory information but does not show the differences from what existed before any changes were made. It also will only show changes that were done in the Overview tab excluding usage changes.

Prerequisites

None

Responsibilities

- Territory Lookup Intermediate User
- Territory Administration HTML

Use the Territory Lookup Intermediate User responsibility and the Territory Administration HTML responsibility to access the Territory Report tab in addition to the Territory Lookup tab.

Navigation

Navigate to the Territory Lookup window.

Steps

1. Enter your user ID and password and click **Go**.
The Territory Lookup window opens.
2. Select the Territory Report tab.
The Definitions report window opens.
3. Select the Changes Report from the subtab.

The Territory Changes Report window opens.

4. From the drop-down list in the Usage field, make your selection.
5. Enter your required date in the Earliest Change Date field.
6. To refine your report, you can enter the date in the Latest Change Date field.
7. In the Active On field, either keep the default date (current date) or click the Date Picker to select the desired date.
8. Click **View Report**.

The Territory Changes Report window displays your requested data.

Note: You can click on the Comma Separated Format icon to download your report in a Microsoft Excel format.

Part III

Appendixes

This part contains the following Appendixes:

- [Appendix A, "Additional Territory Creation Methods"](#)

Additional Territory Creation Methods

This appendix contains additional procedures that can be used to create territories.

A.1 Creating Territory Types

A territory type is used to identify sets of transaction qualifiers' names to be applied to a territory without specifying each individual qualifier's values.

You can simplify and systematize the territory creation process. This saves time when you are creating similar territories by using a type. This is because you can create multiple territories without adding the names of qualifiers to each territory. You still need to enter values for the transaction qualifiers and define resources in each individual territory separately, however.

For example, the Sales department of the Business World Company would like to redefine its sales territories based on geographical locations and customers due to business expansion. Roberta Brooks, the territory administrator, therefore defines a territory type with the Customer Name and Postal Code transaction qualifiers identified, but without specific values for Customer Name and Postal Code.

Prerequisites

- There must be a territory plan in place.
- You must enable your qualifiers.

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration to open the Navigator window

Steps

1. From the Administration menu, select **Define Territory Type**.
The Territory Type window opens.
2. If a similar territory type already exists, then you can save time by copying it.
 - a. Search for a similar territory type.
 - b. If a similar territory type is found, then click **Copy Type**.
The application creates a copy of the existing territory type that can be modified.
3. In the Usage field, use the list of values (LOV) to select the type of application using this territory type.
4. Enter a name for the territory type and a description.
5. Enter a date range to limit the use of the territory type by date.
6. Use the LOV to select one or more transaction qualifiers' names in the Name field based on the selected territory usage. The transaction type field populates automatically.
7. Click **OK** to save your work and exit.

A.2 Creating a Territory Using a Territory Type

Use this method for creating multiple territories with similar characteristics. Using territory types to create territories saves time because you do not have to add qualifiers to each individual territory, but you still have to create each individual territory separately by entering values for the qualifiers.

Prerequisites

- There must be a territory plan in place.
- You must enable your qualifiers.
- You must have a territory type.

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration to open the Navigator window

Steps

1. Select **Define Territory** from the Administration pull-down menu.

The Territory Details window opens.

Note: You can also select any folders under the Catch All folder from the Tree Navigator that serves as a parent to the new territory and right-click to select **New** from the pop-up menu.

2. Select the Overview tab.

Use the same steps identified in the procedure of Creating Individual Territories to enter territory general information in the Overview tab (such as organization, usage, name, description, freeze, start and end dates, parent territory, escalation territory, rank, and number of winners fields) EXCEPT selecting the territory type from the LOV in the Type field before specifying the Transaction Type field.

Note: If you want to create territories using a territory type, then you need to select the territory type first. If the transaction type is selected first before the territory type, then you cannot select the territory type because the selected transaction types override the territory type. The Type field is disabled.

- a. After entering the territory general information (such as organization, usage, name, description, freeze, start and end dates, parent territory, escalation territory, rank, and number of winners), select the territory type from the LOV in the Type field.

Notice that the transaction type information is displayed in the Transaction Types field automatically based on your selected territory type.

1. **Overview tab:** Use this tab to enter basic territory information including usage, name, description, effective dates, as well as transaction types.
2. **Transaction Qualifiers tab:** Use this tab to identify transaction qualifier information (name and its value) and its mode and value set.
3. (Optional) **Resource Qualifiers tab:** Optionally use this tab to specify resource qualifier information (name and its value) and its mode and value set.

Qualifier's Mode

When defining a template, you must specify the qualifier mode for both transaction and resource qualifiers. There are two types of qualifier modes:

- **Static qualifier:** Use the static qualifier to transfer the qualifier's values to every new territory no matter whether or not it is a transaction or a resource qualifier after territory mass-creation. Thus, you can treat the values of the static qualifiers as the required values for every new territory.
- **Dynamic qualifier (Default):** Dynamic qualifiers are used to control the number of territories that are created during the mass-creation process.

Ensure to test two or three territories and ensure they all work correctly before using templates for mass territory creation. Perform the following steps to create a template.

Value Set

Territory templates use the **value set** to assist dynamic qualifier values in transferring to the new territories that are mass-created. This is to make sure that the outcome of the dynamic qualifier values assigned to the new territories is accurate.

Because the dynamic value assigning process is complex, territory templates require that you enter sequential numbers in the Value Set field, starting from "1", each time that you enter the value for dynamic qualifiers. If the numbers that appear in the Value Set are not sequential, such as 1, 3, and 4 (2 is skipped), for either the transaction or resource qualifiers, then the qualifier values that appear in the new territories will not be correct.

For example, when defining three values for the transaction qualifier name "State", you can manually enter "1" in the Value Set field for California, then "2" for Washington, and "3" for Oregon if each territory covers one state.

Note: You can enter the same sequential numbers in the Value Set field if necessary. For example, you want to create a territory that covers open service requests for two states, you can enter the same value set number for different transaction qualifier's values, such as "1" for Oregon and Washington, and "2" for California and Nevada.

Prerequisites

- There must be a territory plan in place.
- If you want to use territory types to create territories, then create the territory types first.
- All transaction qualifiers used in the template must be enabled first.

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

(Territory Manager > Territory Administration to open the Navigator window)

Steps

1. Select **Define Territory Template** from the Administration pull-down menu.
The Template Territory Details window appears.
2. Select the Overview tab.

The Overview tab

Use the same steps identified in the procedure of Creating Individual Territories to enter territory general information in the Overview tab (such as usage, name, description, freeze, start and end dates, parent territory, transaction types, territory type, and escalation territory fields).

The Template, Rank and Number of Winners fields are not available for creating territory templates.

Note: If you want to create templates using a territory type, then you need to select the territory type first. If the transaction type is selected first before the territory type, then you cannot select the territory type because the transaction types override the territory type. The Type field is disabled.

3. Select the Transaction Qualifiers tab.

The Transaction Qualifiers tab

- a. Use the LOV to enter the qualifier's name in the Name field. The value of the selected qualifier's name populates automatically in the Type field.

If you are using a territory type to create the territory template, then some of the qualifier's names are already prefilled.

- b. Select either **Static** or **Dynamic** from the Qualifier Mode drop-down list for each qualifier.

Static qualifier: Static qualifiers' values exist in all the territories you are mass creating and are used to transfer the qualifier's values to every new territory no matter whether or not it is a transaction or a resource qualifier after territory mass-creation. Thus, you can treat the values of the static qualifiers as the required values for every new territory.

Dynamic qualifier (Default): Dynamic qualifiers have a different value in each territory created and are used to control the number of territories that are created during the mass-creation process.

- c. If you want to enter overlapping values for a qualifier, then check the **Overlap Allowed** check box.

- d. Enter values for each transaction qualifier.

- * Use the Operator list of values (LOV) to select an operator.

The list of operators varies depending on the type of qualifier used. Some qualifiers, such as Customer (name of the transaction qualifier), allow only the "=" or "<>" operators.

- * Enter at least three letters to bring up the LOV in the Value From and Value To fields. For example, enter "Bus" to launch the LOV starting with "Bus". If wildcard "%" is used, then use it with letters, such as "B%%", or "%%%" to query the list of values.

Values for a static qualifier: Enter the values for the selected qualifiers and skip the Value Set field.

For example, if you are entering values for the Customer transaction qualifier, then you can enter one value: the name of the customer.

Values for a dynamic qualifier: Enter the value for the selected qualifiers and click **Next Value Set** to enter the Value Set field between each entry or set of entries.

Note: **Value set** is used to assist dynamic qualifier values in transferring to the new territories that are mass-created. This is to make sure that the outcome of the dynamic qualifier values assigned to the new territories is accurate.

- e. If you do not want to add resource qualifiers for this template, then go directly to the Creating Mass Territories step.
4. (Optional) Select the Resource Qualifiers tab.

The Resource Qualifiers tab

- a. Use the list of values (LOV) to enter the qualifier's name in the Name field.
- b. Select either **Static** or **Dynamic** from the Mode drop-down list for each qualifier. Enter appropriate values or value set information if it is for a dynamic mode.

Use the same method specified in the Transaction Qualifiers tab regarding entering static and dynamic modes, its values, and value set information.

5. Save your work.

A.4 Creating Mass Territories with a Template

Now that you have created a template, perform the following steps to create a large numbers of territories.

Prerequisites

- You must have created a template.
- There must be a territory plan in place.

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration to open the Navigator window

Steps

1. From the tree Navigator, select Territory Templates from the View By drop-down list to locate the template that you want to use.

Note: You can also open a new territory and select the template that you want to use from the Template field in the Overview tab.

2. Double-click the template.

The Template Territory Details window opens.

3. Select the Transaction Qualifier tab or the Resource Qualifier tab.

The chosen tab window opens.

4. Click **Mass Create Territories**.

The system creates territories with generated names in the form:

<template name> - GENERATED TERRITORY #<number>

For example, the territory template named "US Time Zones" generates three territories with the following names:

- US Time Zones - GENERATED TERRITORY #1
 - US Time Zones - GENERATED TERRITORY #2
 - US Time Zones - GENERATED TERRITORY #3
5. Open each territory to assign appropriate resources in the Resources tab after territory mass creation.

A.5 Creating Escalation Territories

An escalation territory provides the resources that are responsible for managing escalations. Escalation territories provide you with the ability to define the escalation path, with an appropriate resource identified for the territory in the event of exceptions. The escalation resource is of type Employee Resource and can be assigned either manually or automatically.

In case of automatic assignment by using an escalation territory, the Assignment Manager is used in conjunction with Territory Manager. An escalation document can be automatically assigned to an owner if the original assignee of an escalated document (a service request, task, or defect) is selected from a territory and this territory has an escalation territory attached to it.

Use the following tabs to create escalation territories:

1. **Overview tab:** Use this tab to enter basic escalation territory information including name, description, and effective dates.
2. **Optional) Resource Qualifiers tab:** Use this tab to specify resource qualifiers and their values. This tab is not required if you know the exact resource names you want to use in an escalation territory.
3. **Resources tab:** Use this tab to specify exact resource information manually or click **Auto Assign Resources** to select qualifying resources based on resource qualifiers and their values defined in the Resource Qualifiers tab.

Perform the following steps to create escalation territories.

Prerequisites

There must be a territory plan in place.

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator

Navigation

Territory Manager > Territory Administration to open the Navigator window

Steps

1. From the Administration menu, select **Define Territory Escalation**.
The Escalation Territory Details window appears.
2. Select the Overview tab.

The Overview tab

- a. Use the list of values (LOV) in the Usage field to select the type of application you want to use in this territory.
 - b. Enter a name and description for the escalation territory.
 - c. Enter the Start and End Dates to limit the time the territory is effective.
By default the territory become effective on the date created.
3. (Optional) Select the Resource Qualifiers tab if necessary.

(Optional) The Resource Qualifiers tab

Use the same steps identified in the procedure of Creating Individual Territories to enter resource qualifier information in the Resource Qualifiers tab.

4. Select the Resources tab.

The Resources tab

You must enter resource information in the Resources tab for the escalation territory. Use the same steps identified in the procedure of Creating Individual Territories to enter resource information in the Resources tab.

5. Click **Save** on the toolbar.

