

Oracle® Territory Manager

User Guide

Release 11*i*

Part No. B12219-02

May 2004

Oracle Territory Manager User Guide, Release 11i

Part No. B12219-02

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Oracle welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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Preface

Intended Audience

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

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

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

If you have never used Oracle Territory Manager, Oracle suggests you attend one or more of the Oracle Territory Manager 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 Manager.

- Chapter 1 is an introduction to the application including key features and integration information.
- Chapter 2 provides the business flows.
- 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 the territory lookup tool.
- Chapter 6 covers procedures a sales territory administrator uses to create territory groups and named accounts.
- Chapter 7 covers creating territories using the Territory Navigator.
- Chapter 8 describes how to run reports that are useful for a territory administrator.
- 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 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 Manager.

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 *OracleMetaLink*.

Related Documentation

Oracle Territory Manager 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 Manager.

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 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 Manager (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 Manager 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 11*i*, 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 11*i*. 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 11*i*. You cannot upgrade to Release 11*i* 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.

Oracle Applications Framework Personalization Guide

The self-service portion of Oracle Territory Manager is built using Oracle Applications Framework. This document explains how to make personalizations.

Oracle Applications Framework Developer's Guide

The self-service portion of Oracle Territory Manager is built using Oracle Applications Framework. This document explains how to make customizations.

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 Manager. This manual details additional steps and setup considerations for implementing Oracle Territory Manager with this feature.

Multiple Organizations in Oracle Applications

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

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 Manager 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 Common Application Components Implementation Guide

Many CRM products use common application components. Use this guide to correctly implement common components.

Oracle Trading Community Architecture Administration User Guide

The customer information used for creating named accounts comes from Oracle Trading Community Architecture.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Territory Manager 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 Manager 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[®] server, and your hardware and software environment.

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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.

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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.

Introduction to Oracle Territory Manager

This chapter discusses the key features and integrations of Oracle Territory Manager. Sections in this chapter include:

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Oracle Territory Manager Key Features"](#)
- [Section 1.3, "Oracle Territory Manager Integrations"](#)
- [Section 1.4, "What's New in this Release"](#)
- [Section 1.5, "Terms and Definitions"](#)
- [Section 1.6, "Accessing Oracle Territory Manager"](#)
- [Section 1.7, "Accessing Oracle Territory Manager Administration \(Forms\)"](#)
- [Section 1.8, "Accessing Oracle Territory Manager Administration \(HTML\)"](#)
- [Section 1.9, "Summary of Oracle Territory Manager Tasks"](#)

1.1 Overview

Oracle Territory Manager assigns business objects (customers 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 or Sam's sales group. This territory is defined using the following qualifiers:

- Account Classification = High Tech
- State = California

The resource assigned to the territory is Joe who is in Sam's sales group.

When concurrent programs are run, the territory assignment engine assigns resources to business objects such as the following:

- customers
- leads
- opportunities
- service requests
- tasks
- contract renewals
- defects
- trade management claims and offers
- delinquencies

1.1.1 Components

For all territory implementations the territory administrator uses the Forms windows to create qualification rules and to create territories and a hierarchy of territories, each with assigned resources.

Sales territory implementors have the option to establish named account territories. Sales administrators use the HTML pages to create territory groups and named accounts. Sales managers then use the HTML pages to assign their named accounts to individual sales representatives.

Individual sales representatives use the HTML pages to review the named accounts they own and information about the sales team for an account.

Geographic territories can similarly be created for sales using self-service HTML pages.

Sales managers use the alignment tool to create what-if territories and compare them.

The territory lookup tool in HTML is available for anyone to look up the salespeople assigned to an account.

1.1.2 Forms Based Territories

Territory administrators fully define territories and place them in a hierarchy using the Territory Navigator. This method of defining territories applies to all usages. A usage is an Oracle Applications module that uses Oracle Territory Manager to assign resources. Following are the available usages:

- Oracle Collections
- Oracle Defect Management
- Oracle Partner Manager
- Oracle Sales and TeleSales
- Oracle Service
- Oracle Service Contracts
- Oracle Trade Management

To define a territory, the administrator specifies the types of transactions the territory assigns, who is assigned to the territory, and the criteria used to assign.

1.1.3 Named Accounts

Most customers fall into sales territories segmented along geographic or industry boundaries. Named accounts represent individual customers elevated from geographic territories and deemed by a sales organization as critical enough to have their own salesperson or account manager.

By their very nature, named account territories are difficult and complex to maintain and revolve around a decentralized business process.

A set of named accounts are identified and associated to a sales division by upper levels of sales management. The sales vice presidents responsible for the sales

division distribute named accounts to their directs in a top down fashion through the sales hierarchy until all named accounts are owned by salespersons.

1.1.4 Self-Service Named Account Alignment for Sales

Proper territory alignment is frequently overlooked and can have a high impact on sales force productivity. Without any additional salespeople, studies have shown 2-7% increases in sales revenue due to proper territory alignments.

Sales managers start the year with compensation plans, named accounts, and quotas. They can then build and save what-if territories in an iterative manner until their alignment goals are met.

Sales managers export a territory alignment to spreadsheet, change named account assignments, and upload the changes for the alignment. Through the HTML interface they use analytic data to compare two alignments using graphs and a calculated balance index. When managers are happy with an alignment they can activate it, making it the one of record.

At the end of the alignment process, named account quotas can be manually entered into the Oracle Incentive Compensation Quota Planning module.

1.1.5 Self-Service Geographic Territories for Sales

Geographies are centrally identified to a sales organization and distributed top down to individual salespeople. Ownership changes are reflected quickly to all levels of sales management and for incoming leads and opportunities.

At each level of the distribution process, the ownership of geographies is clearly and accurately communicated. Sales management interfaces are simplified for common administrative tasks such as the transfer of geographic territories between salespeople.

1.2 Oracle Territory Manager Key Features

Oracle Territory Manager includes the following features:

- Over 100 qualifiers through which to define territory rules
- Assignment to individual resources or groups (for sales)
- Assignment to individual resources or groups or teams (for service)
- Named account support

- HTML based product flows for the distribution of named accounts
- Named account alignments with visual comparison of what-if territories
- HTML based creation and distribution of geographic territories
- Configurable territory exception handling through Oracle Workflow
- Territory diagnostics

1.3 Oracle Territory Manager Integrations

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

- **Oracle TeleSales, Oracle Sales, and Oracle Field Sales:** accounts, leads, and opportunities are assigned to sales agents based on territory definitions. Oracle TeleSales and Oracle Field Sales also use the Territory Lookup Tool or the Sales Team Lookup to search for sales representatives. Territory alignment uses past opportunity data in calculating metrics.
- **Oracle Incentive Compensation:** uses the sales set up for accounts.
- **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 Manager 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:** TCA provides DUNS number, DNB annual revenue, and DNB number of employees.

- **Oracle WebADI:** The application uses Web ADI to export and import named account and geography assignments to and from Microsoft Excel. (Required for Geographic Territories and Named Account Territory Alignment.) Also, Oracle Web ADI requires that you use Microsoft Internet Explorer for your browser.
- **Oracle Partner Management:** Partner transaction type supporting channel manager territories.

1.4 What's New in this Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.10 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 are added to Oracle Territory Manager in this release.

- Named account territory alignment
- Self-service geographic territories for sales
- Excel based named account and geography distribution for Sales management

Lists of named accounts and geographies can be exported through Oracle WebADI to Microsoft Excel. Using Oracle Web ADI technology and Excel, sales managers can distribute their named accounts or define geographies in Excel and upload their modifications later when they are connected. Validations are performed to ensure no new named accounts or geographies are added that the sales manager does not own.

A list of named accounts or geographies and related information can be exported to Excel for printing as well.

- Named account administration through Excel

Territory administrators can work in spreadsheet to promote organizations to become named accounts, transfer named accounts from one territory group to another, delete named accounts from territory groups, and update sales teams for named accounts.

- Sales hierarchy drilldowns for territory reporting

The application introduces sales hierarchies into the sales management portlets to allow managers to drill down on a sales manager to review named account

and geographic distributions for their directs. This is especially important for upper sales management when performing territory reporting.

- DUNS number matching rule

In addition to matching on customer name range and postal code, you can use DUNS number as a primary matching rule. This increases territory accuracy as a transaction can be matched via DUNS number or customer name range and postal code.

As customers, leads, and opportunities are assigned via territories, named account matching will first check for a matching DUNS number and then check for a matching customer name range and postal code.

- Registry ID is a matching rule for creating named account territory groups

If you are not using Dun & Bradstreet information you can use the registry ID to create territory groups and named accounts.

- Registry ID from Oracle Trading Community Architecture is available as a qualifier for the Sales and TeleSales usage

- Overlapping Named Accounts Report

Named accounts overlap when they belong in more than one territory group assigned to the same sales management. This report in conjunction with the Named Account Conflicts screen can eliminate overlapping territories.

- Oracle Sales and TeleSales Usage

- New DUNS Number qualifier for the Accounts transaction type
- Enhanced SIC Code qualifier for the Accounts transaction type to support various SIC code types
- New Channel qualifier for the Leads transaction type
- New Quoting transaction type
- New Product Category qualifier for the Quoting, Lead, and Opportunity transaction types
- Support for multiple winners down to five levels
- Oracle Incentive Compensation uses the Account transaction type in the Sales and TeleSales usage

- New Oracle Partner Management Usage

- New Partner transaction type supporting channel manager territories

- New account based qualifiers for the Partner transaction type

1.5 Terms and Definitions

Alignment

The sales manager rebalances sales territories according to a goal and a quota component. An alignment is composed of a set of proposed territories and quotas.

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 is 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. It does not apply to top level territories, but is set at the top level and applies to the hierarchy below the top level.

For the Sales and TeleSales usage only, you can set the number of winners separately from the top level territory down four levels (total of five levels). The number of winners applies to the next level of territories only. If you do not set the number of winners for a territory it defaults to the number of winners for its parent.

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 within a single level of the hierarchy. It is used with number of winners. If a company qualifies for three territories at the same level, but the number of winners can only be one, then the company goes to the territory with the highest rank (lowest number). Territories lower down the hierarchy always have a built in priority over territories higher in the hierarchy.

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 grouping of named accounts or postal codes assigned to a salesperson. 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 Manager to assign resources, such as Sales or Service.

1.6 Accessing Oracle Territory Manager

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

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.

1.7 Accessing Oracle Territory Manager Administration (Forms)

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

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.

1.8 Accessing Oracle Territory Manager Administration (HTML)

Use this procedure to access the self-service windows for the administrator to monitor, create, and update geographic or named account territory groups and maintain named accounts.

Login

Log in to your personal home page (PHP).

Responsibility

Territory HTML Global Sales Administrator

Navigation

PHP > Territory HTML Global Sales Administrator

Steps

1. In the Self Service section of your personal home page Main Menu tab, choose Territory HTML Global Sales Administrator.
2. Choose Dashboard.

1.9 Summary of Oracle Territory Manager Tasks

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

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

Oracle Territory Manager Business User Flows

This chapter provides an overview of the process flows in Oracle Territory Manager. Sections in this chapter include:

- [Section 2.1, "Process Flow for Creating Territories"](#)
- [Section 2.2, "Process Flow for Self-Service Named Accounts"](#)
- [Section 2.3, "Process Flow for Self-Service Geographic Territories"](#)

2.1 Process Flow for Creating Territories

Following is the high level process for creating territories.

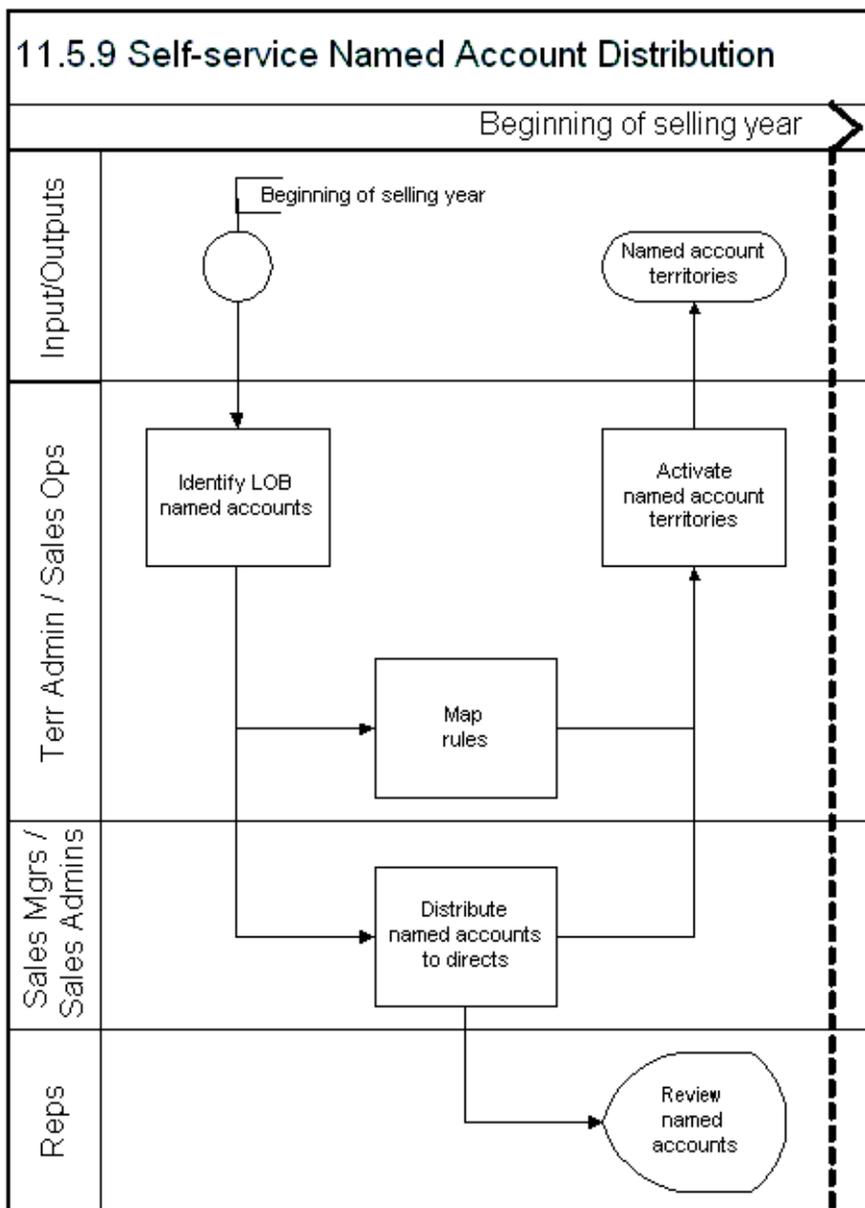
1. Business analysis and planning are vital first steps resulting in an implementation plan and a territory hierarchy.
2. The territory administrator enables qualifiers that can be used when creating territories.
3. The territory administrator creates territories within the structure of a territory hierarchy. This is based on your business analysis and implementation plan.
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 or the *Generate Territory Details* request set to enable current territory definitions.
6. Applications call Oracle Territory Manager to return a set of resources for assignment to business objects.

2.2 Process Flow for Self-Service Named Accounts

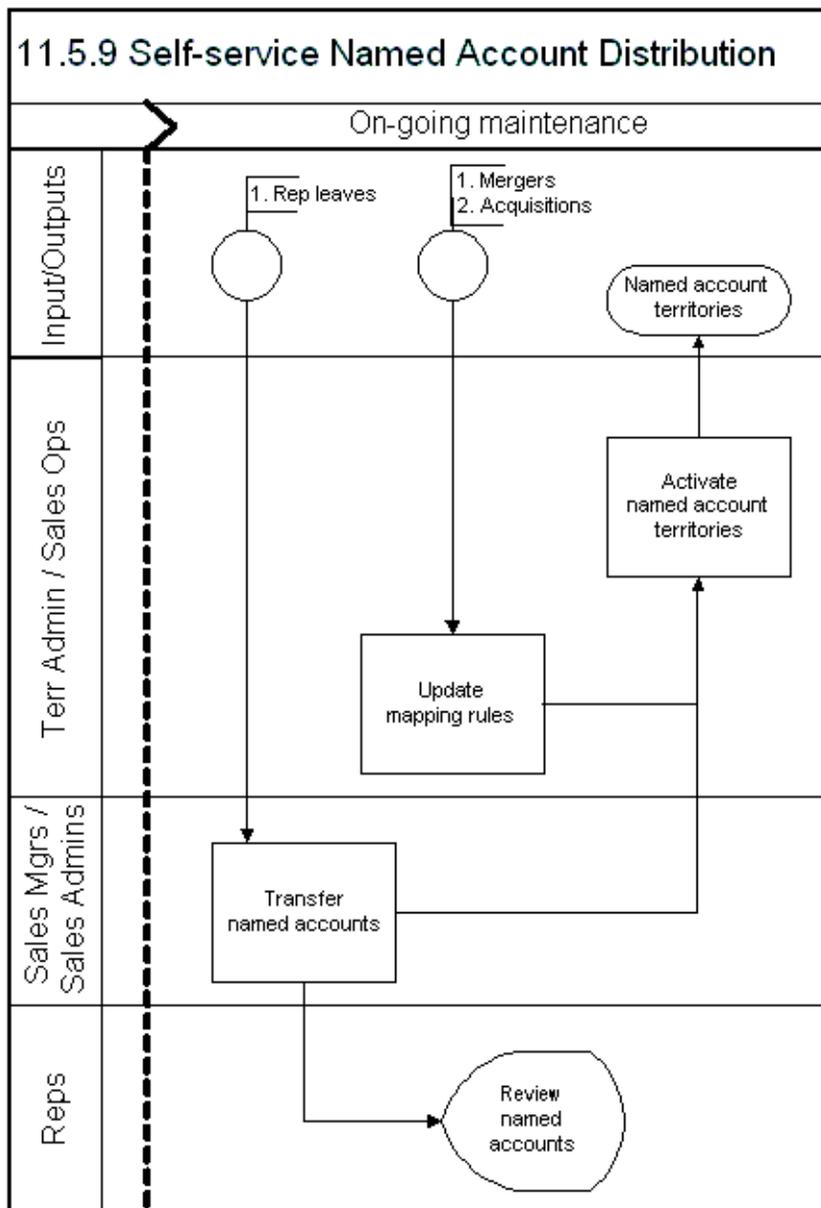
Following are the basic steps for creating named accounts and assigning them to salespeople.

1. The territory administrator creates a territory group.
2. The territory administrator defines named account rules that relate organizations to a named account.
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 Details* concurrent program request set to automatically generate territories within 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.



2.3 Process Flow for Self-Service Geographic Territories

Following are the basic steps for creating geographic territories and assigning them to salespeople.

1. The territory administrator creates a geographic territory group and assigns geographic areas and postal codes to the territory group. The administrator also assigns one or more sales executives to the territory group. For example, the territory group is for the United States and the Vice-President of Sales is assigned to the territory group.
2. The sales executives create territories with the territory group as the parent territory, giving the territories names and assigning sales managers to each territory. For example, the Vice-President creates two territories, East US and West US and assigns the two sales directors to these territories.
3. Sales executives export their unassigned postal codes to spreadsheet.
4. Sales executives fill in the Territory Name, Sales Role, and Sales Group columns for every postal code and then upload the information back into the application.
5. The sales managers who are assigned to the newly created territories create territories with the territory assigned to them as the parent territory. For example, the sales director for West US creates territories for each state and assigns sales managers to each new territory.
6. The sales managers repeat steps 3 and 4 for their direct reports.
7. The process repeats down the sales hierarchy.
8. The territory administrator runs the *Generate Territory Details* concurrent program request set to automatically generate territories within the existing territory hierarchy.

Viewing Your Territory Information (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, "Exporting Named Accounts to Print"](#)
- [Section 3.6, "Exporting Postal Codes to Print"](#)
- [Section 3.7, "Viewing Your Geographic Territories"](#)
- [Section 3.8, "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, export and view the details of a geographic territory, and see who else is on their sales team. The Salesperson page displays a count of the number of named accounts and geographic territories the salesperson owns. Territory information can also be exported to spreadsheet and printed.

3.2 Viewing Your Named Accounts

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

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 including sales team information.

2. To view details for a named account, click the name.

The address and sales team information appear.

3.3 Searching for a Named Account

Use this procedure to search for a named account.

Steps

1. In the simple search, select one of the following search criteria:
 - Named Account
 - Site Type
 - City
 - State

- Postal Code
 - Territory Group
2. Enter one or more characters to search on.
 3. Click **Go**.

A list of named accounts that matches your search criteria appears. The table lists all territory groups and all salespeople for each named account.

3.4 Using Advanced Search

Use this procedure to search for a named account using the 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. The table lists all territory groups and all salespeople for each named account.

Guidelines

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

3.5 Exporting Named Accounts to Print

Use this procedure to export your named accounts to Microsoft Excel and print them.

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.

If you want to export all of your named accounts, then do not perform a search or display a subset of named accounts on the page.

2. Click **Export**.

A confirmation message appears.

3. View the Download Messages window for number of records exported and the success of the download.
4. Switch to your spreadsheet program to view and print your named accounts.

3.6 Exporting Postal Codes to Print

Use this procedure to export postal codes assigned to you to Microsoft Excel and print them.

Navigation

Salesperson > Geography

Steps

1. Select Unassigned Postal Codes.
2. Click **Export**.
A confirmation message appears.
3. View the Download Messages window for number of records exported and the success of the download.
4. Switch to your spreadsheet program to view and print your postal codes. You may need to unprotect the worksheet before you can resize columns or make any other changes.

3.7 Viewing Your Geographic Territories

Use this procedure to view the details for your geographic territories.

Steps

1. The Geography tab lists your geographic territories.
2. To export one or more of your geographic territories to spreadsheet, select each territory that you want to export.
3. Click **Export**.

The postal code information for your selected territories appears in a spreadsheet for viewing. You may need to unprotect the worksheet before you can resize columns or make any other changes. The application will not accept any changes you upload.

3.8 Using the Sales Team Lookup

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

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 **Go**.
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 Territories (Sales Manager)

This chapter is intended for the sales manager where the self-service named account territories or geographic 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, "Assigning the Sales Team to Named Accounts"](#)
- [Section 4.4, "Exporting All Named Accounts to Microsoft Excel"](#)
- [Section 4.5, "Exporting Selected Named Accounts to Microsoft Excel"](#)
- [Section 4.6, "Uploading Named Accounts from Spreadsheet"](#)
- [Section 4.7, "Transferring Named Accounts"](#)
- [Section 4.8, "Creating a Named Account Territory Alignment"](#)
- [Section 4.9, "Assigning Named Accounts for an Alignment"](#)
- [Section 4.10, "Comparing Alignments"](#)
- [Section 4.11, "Activating a Territory Alignment"](#)
- [Section 4.12, "Overview of Geographic Territory Groups"](#)
- [Section 4.13, "Creating a Geographic Territory"](#)
- [Section 4.14, "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 4.14, "Reviewing Your Account Assignments"](#)) is to review the accounts assigned to you and decide how you want to distribute them to your salespeople.

You can use alignments (see [Section 4.8, "Creating a Named Account Territory Alignment"](#)) to create what-if territories (see [Section 4.9, "Assigning Named Accounts for an Alignment"](#)) and compare them (see [Section 4.10, "Comparing Alignments"](#)) until you find the best alignment, and then activate the alignment (see [Section 4.11, "Activating a Territory Alignment"](#)) to create the territories and assignments.

You can alternatively distribute named accounts to your directs by adding your directs to the sales team of one or several named accounts at a time (see [Section 4.3, "Assigning the Sales Team to Named Accounts"](#)).

After assigning the sales team to named accounts, you review the distribution (see [Section 4.14, "Reviewing Your Account Assignments"](#)) and make any necessary adjustments.

To improve productivity, you continue to use alignments to find the best balance of potential and quota for your sales organization. Create alignments periodically throughout the year to make sure territory assignment is fair when named accounts change and when you receive updated information for the named accounts such as annual revenue. Proper alignments produce increased sales revenues.

4.2 Viewing Your Named Accounts

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

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 including sales team information.

2. To view details for a named account, click the name.

The address and sales team information appear.

4.3 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.

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, sales group, and sales role from the LOV. Only sales roles that are associated to the territory group that contains the named account appear in the LOV. Managers can select immediate directs or any salesperson rolling up to the manager.

- b. If you want the salesperson added to subsidiaries of the selected named account, then select **Add to Subsidiaries**.

- c. 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, sales group, and sales role from the LOV.
 - b. If you want the salesperson removed from subsidiaries of the selected named account, then select **Remove from Subsidiaries**.
 - c. 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.

You can only add salespeople who have the group and role access defined for the territory group.

4.4 Exporting All Named Accounts to Microsoft Excel

You can export all the named accounts that you own to Microsoft Excel. In the spreadsheet you can edit the information to import back into your customer database.

Note: Do not change the format of any cell in the spreadsheet, for example changing a number to a date. Only update the sales team information: Salesperson, Group, and Role columns. Changes to any other data are ignored.

Prerequisites

You must own the named accounts.

You must use Microsoft Internet Explorer as your browser.

Steps

1. Do not conduct a search or have a subset of your named accounts displayed in the Named Account page.
2. Click **Export**.
A confirmation message appears.
3. View the Download Messages window for number of records exported and the success of the download.
4. Switch to your spreadsheet program to view and edit your named accounts. You may need to unprotect the worksheet before you can resize columns or make other changes.

Guidelines

If you are a proxy user for more than one manager, please note that the Salesperson LOV displays the directs for both managers, even though both do not own the named accounts.

4.5 Exporting Selected Named Accounts to Microsoft Excel

You can export selected named accounts that you own to Microsoft Excel. In the spreadsheet you can edit the salesperson, group, and role only to import back into your customer database.

Note: Do not change the format of any cell in the spreadsheet, for example changing a number to a date. Only update the sales team information: Salesperson, Group, and Role columns. Changes to any other data are ignored.

Prerequisites

You must own the named accounts.

You must use Microsoft Internet Explorer as your browser.

Steps

1. Conduct a search to find the named accounts you want to export.
The search results appear on the Named Account page.

Note: The Select column does not apply for exporting. All named accounts that answer the search criteria are exported.

2. Click Export.

A confirmation message appears.

- 3. View the Download Messages window for number of records exported and the success of the download.**
- 4. Switch to your spreadsheet program to view and edit your named accounts. You may need to unprotect the worksheet before you can resize columns or make other changes.**

Guidelines

If you are a proxy user for more than one manager, please note that the Salesperson LOV displays the directs for both managers, even though both do not own the named accounts.

4.6 Uploading Named Accounts from Spreadsheet

After you edit named account information in the spreadsheet you downloaded, you can then upload the changed information back to your customer database.

Prerequisites

You must own the named accounts.

You must use Microsoft Internet Explorer as your browser.

Perform an export of named accounts.

One or more named accounts in the spreadsheet must be flagged as being changed. When you edit a row in the spreadsheet, the flag in the first column of the spreadsheet automatically turns on.

Note: Do not change the format of any cell in the spreadsheet, for example changing a number to a date. Only update the sales team information: Salesperson, Group, and Role columns. Changes to any other data are ignored.

Steps

1. Open the spreadsheet if you saved it after making your edits in a prior session.
2. From the **Oracle** menu, choose **Upload**.
The Upload window opens.
3. Click **Upload**.
The Upload Messages window displays the number of records uploaded and when the upload is successful.
4. Switch to your Named Account page.
5. Requery to view your updated information.

Guidelines

The LOVs in the spreadsheet are not as restrictive as when you update information in the application. Therefore, any errors are caught during the upload process and error messages displayed in a column of the spreadsheet. The LOVs are not available when you work remotely.

4.7 Transferring Named Accounts

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

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.

4.8 Creating a Named Account Territory Alignment

Alignments are models of proposed named account assignments a manager uses to try different assignment strategies until the best alignment is found that meets the manager's goals. You can compare alignments and fine tune your account assignments before activating the proposed territories, thereby creating fair territory assignments that balance sales potential and quota. Use this procedure to create an alignment.

Prerequisites

You must have a manager role and have direct reports. You must own named accounts.

Steps

1. Click **Align Territory**.

A list of existing alignments appears.

2. Click **Create Alignment**.

The Create Alignment page displays proposed territories. The proposed territories are named for each salesperson who reports to you and one proposed territory with your name.

3. Enter a name for this alignment.
4. Enter your total quota amount.
5. Enter proposed quota amounts for each proposed territory.
6. Click **Apply**.

The new alignment appears in the list of alignments. You can now fine tune the account assignments and compare two alignments.

4.9 Assigning Named Accounts for an Alignment

You can view all of your named accounts in a spreadsheet, including currently assigned salespeople. Use this procedure to add or change the salespeople assigned to each named account in the alignment.

Steps

1. Click **Align Territory**.

A list of existing alignments appears.

2. Find the alignment in the list that you want to assign, and click **Export**.

Note: Export only includes named accounts you currently own. In the case of an existing alignment where account assignments were already done, it still exports only named accounts you currently own rather than the named accounts that were previously assigned.

3. Click **Next**.

All named accounts that you own as well as their existing salesperson assignments export to spreadsheet. Columns include the following metrics:

- DNB Annual Revenue
- DNB Number of Employees
- Prior Sales (Prior sales is the sum of all the Won opportunities within a period of time for the named account. This period is set in the system profile options *Territory Alignment Metric Calculation From Date* and *Territory Alignment Metric Calculation To Date*.)

There are also columns for up to 30 salespeople per named account.

4. To assign a salesperson to an account, double-click in a salesperson column and select from the LOV. You can also copy and paste the salesperson plus group plus role to other rows.
5. When you have completed making your salesperson assignments, choose **Upload** from the Oracle menu.

You can now compare your alignment with another alignment, and activate it if you decide it is correct. When activated, it replaces your current named account territory assignments.

4.10 Comparing Alignments

Use the calculations and graphs provided in the alignment comparison to improve your territory planning and to justify your territory assignments. The graphs show the comparison between a salesperson's quota and assigned named accounts, as well as how they compare to other salespeople on the team, using different metrics such as total number of named accounts.

The balance index provides a quick way to judge the fairness and efficiency of your proposed territory alignment by calculating standard deviations for selected metrics. If every salesperson on your team has the same relationship between his quota and the metric for his assigned named accounts, then the standard deviation is zero and the index is 100. If one salesperson in the group has a much higher quota compared to the metric for his assigned named accounts, then the standard deviation is higher and the balance index is lower.

Prerequisites

You must have a manager role and have direct reports.

You must own named accounts.

You created at least one alignment.

The concurrent program *Calculate Territory Alignment* should be run whenever there are changes in the Dun & Bradstreet information, such as number of employees or annual revenue; changes in the desired date range set in the *Territory Alignment Metric Calculation* system profile options; and when new named accounts are created.

Steps

1. Click **Align Territory**.

A list of existing alignments appears.

2. Select two alignments and click **Compare**.
3. The Compare Alignments: Prioritize Metrics page appears.
4. Choose how you want to weight the four performance metrics. The four metrics are:
 - DNB Annual Revenue
 - DNB Number of Employees
 - Number of Named Accounts owned by each salesperson

- **Prior Sales:** (Prior sales is the sum of all the Won opportunities within a period of time for the named account. This period is set in the system profile options *Territory Alignment Metric Calculation From Date* and *Territory Alignment Metric Calculation To Date*.)

The weighting options are:

- Unimportant (weighted as 0)
- Of Little Importance (weighted as 1)
- Moderately Important (weighted as 2)
- Important (weighted as 3)
- Very Important (weighted as 4)

5. Click *Continue*.

The Compare Alignments: Review Comparison page displays a table to compare the two alignments using the following columns.

- **Alignment Balance Index:** The calculated index takes into consideration the weighting of each metric and the standard deviation for each metric. An index of 100 is a perfect score, with no standard deviations. The closer to an index of 100 your alignment is, the more balanced it is between your salespeople.
- **Total Proposed Quota:** You can compare the total quota amounts proposed for each alignment.
- **Percent Quota Overassigned:** This is the proposed quota for each alignment divided by your quota, shown as a percentage. For example, you as a manager have a quota of \$10M but you allocate \$12M to your directs. Your overassignment percentage is 120%.

6. You can view graphs for each alignment for a single metric by selecting that metric. Your weighting of the metric does not apply. The graph shows the percentage of the total metric that each salesperson owns compared to the percentage of the total proposed quota that he has been assigned.

When you have an alignment that best meets your goals, you are ready to activate it.

Guidelines

The data used for each metric is calculated by running the concurrent program *Calculate Territory Alignment Metrics*. This concurrent program should be run for a metric whenever the data for that metric changes.

Standard Deviation as a Measure of Balance: The standard deviation is often used by investors to measure the risk of a stock or a stock portfolio. In this case, sales managers can use standard deviation to measure the balance or imbalance of a metric. The basic idea is that the standard deviation is a measure of imbalance: the more a salesperson's territory potential varies from the same salesperson's quota, the more imbalanced territory and quota are.

The balance index is the summation of each metric balance times its weighting. The metric balance measures the balance for a particular metric by calculating the standard deviation of the difference between its potential (via the metric) and its quota as percentages. $\text{Metric Balance} = 100 - \text{Standard Deviation (Potential \% - Quota \%)}$.

The calculated metrics for an existing alignment do not change until an export and upload are done. For example, an existing alignment includes account A which is no longer one of your named accounts. When you export the alignment it includes only named accounts you currently own. When you upload, the metrics are newly calculated based on current named accounts in the alignment.

4.11 Activating a Territory Alignment

When you decide that an alignment is much better than the existing territory assignments, you can activate it and replace the existing named account territory assignments.

Steps

1. Click **Align Territory**.

A list of existing alignments appears.

2. For the chosen alignment, click **Activate**.

Existing named account assignments are removed and replaced with the assignments specified in your alignment. You can keep the alignment for comparisons with other alignments, change it, or delete it. Deleting or changing it does not affect the new territory assignments.

4.12 Overview of Geographic Territory Groups

Geographic territories are defined using postal codes. To speed the process for creating a geographic territory group, the administrator can select a large geographic area such as a country or state, and the application includes all postal codes within that geographic region. The administrator assigns one or more sales managers to the territory group.

Sales managers then create territories for portions of the geographic area assigned to them and assign salespeople or sales managers to each created territory. The next level of sales management in turn allocates portions of their assigned territories to their salespeople by creating territories.

4.13 Creating a Geographic Territory

Sales managers create territories for portions of the geographic area assigned to them and assign salespeople or sales managers to each created territory. Use this procedure to create a territory for specified postal codes and assign a sales team to it.

Prerequisites

A geographic territory group must first be created by the sales administrator and you must be assigned to it or to a geographic territory in the territory group.

You must use Microsoft Internet Explorer as your browser.

Navigation

Salesperson > Geography

Steps

1. Click **Create Territory**.
The Create Territory page appears.
2. Enter a unique territory name.
3. The Parent Territory Name LOV displays the names of geographic territories assigned to you by your manager. Select the name of the parent territory that you would like to distribute.
4. Select the name of the salesperson to whom you are assigning this new territory.
5. Click **Add Another Row** to assign additional salespeople to this territory.

6. Click **Apply**.
7. In the Geography page, select Unassigned Postal Codes and click **Export**.
Your unassigned postal codes appear in a spreadsheet.
8. For each postal code that you want included in your new territory, enter the territory name in the Territory Name column or double-click and select the name from the LOV. You can use copy and paste to paste the territory name into other rows.

Note: If you are a proxy user for more than one manager, please note that the Salesperson LOV displays the directs for both managers, even though both do not own the postal codes.

9. In the spreadsheet menu, choose **Oracle > Upload**.

Only the records that you changed are uploaded. The spreadsheet displays a smiling face in the Messages column of the spreadsheet for every successfully uploaded line. If your territory name did not match an existing territory, then the record fails in the upload and a frowning face appears in the Messages column for that line.

When the *Generate Territory Details* concurrent program request set is run, the territories are created and can be viewed in Forms.

Guidelines

Only postal codes that belong to the parent territory can be assigned to your territory.

4.14 Reviewing Your Account Assignments

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

Prerequisites

The concurrent program *Named Account Territory Post Processing* refreshes the information with any changes.

Steps

1. Select the Salesperson subtab.

The Named Account and Geography Distribution page lists your salespeople and the number of named accounts and geographic territories assigned to each.

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.

Steps

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

The Territory Lookup window opens.

2. 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).

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).

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 Territory Groups (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, "Overview of Geographic Territory Groups"](#)
- [Section 6.3, "Creating Named Account Territory Groups"](#)
- [Section 6.4, "Defining Named Account Assignment Rules"](#)
- [Section 6.5, "Promoting Organizations to Named Accounts Using Spreadsheet"](#)
- [Section 6.6, "Maintaining Named Accounts in Spreadsheet"](#)
- [Section 6.7, "Creating Geography Territory Groups"](#)
- [Section 6.8, "Updating Territory Groups"](#)
- [Section 6.9, "Deleting Named Accounts from Territory Groups"](#)
- [Section 6.10, "Deleting Territory Groups"](#)
- [Section 6.11, "Monitoring the Named Account Setup Process"](#)
- [Section 6.12, "Checking for Named Account Overlap"](#)
- [Section 6.13, "Reviewing the Named Account Sales Team"](#)
- [Section 6.14, "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. Administrators also have the ability to assign sales teams to named accounts.

The administrator can export named accounts or organizations to Microsoft Excel and work in the spreadsheet to promote organizations to named accounts, transfer named accounts between territory groups, remove named accounts from territory groups, and update sales team assignments. All updates are made in the spreadsheet and then uploaded to make the territory changes.

Behind the scenes, concurrent programs generate a set of sales territories similar to those created manually in the Oracle Territory Manager Forms windows. The application generates territories for each named account utilizing the definitions maintained by territory administrators and assigns salespersons as defined by sales management. This generation is part of the *Generate Territory Details* concurrent program request set used to enable territories.

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

6.2 Overview of Geographic Territory Groups

Geography territories are defined using postal codes. To speed the process for creating a geographic territory group, the administrator can select a large

geographic area such as a country or state, and the application includes all postal codes within that geographic region. The administrator assigns one or more sales managers to the territory group.

Sales managers then create territories for portions of the geographic area assigned to them and assign salespeople or sales managers to each created territory. The next level of sales management in turn allocate portions of their assigned territories to their salespeople by creating territories.

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

The generated geographic territories are frozen and cannot be updated in the Forms user interface. They appear as child territories of the geographic territory group, but do not appear in a multi-level hierarchy below the territory group.

6.3 Creating Named Account Territory Groups

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

Prerequisites

A territory must exist in one of the top 5 levels of the hierarchy to be used as the parent territory.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Territory Manager > Territories > 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. The parent territory must be in one of levels 1 through 5 of the hierarchy and must be created using Forms.
4. Enter a rank for the territory group.
5. Optionally, enter the number of winners. If you leave this field blank, then the number of winners is defaulted from the parent territory.
6. Enter a start date for the territory to be active.
7. Optionally, enter an end date after which the territory group becomes inactive.
8. If you do not want this territory group to have a catch all territory, then deselect **Generate Catch All**. A catch all territory requires having a resource assigned to it. A catch all territory only applies if you use either the customer name range and postal code matching rule or the DUNS number, customer name range, and postal code matching rule. The catch all captures the name range without postal codes. DUNS number and registry ID are precise matching rules and no records fall into a catch all.
9. Click **Next**.

The Define Role Access page appears.

10. 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.
 - c. If the role has lead or opportunity access, 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.

11. Perform the following steps to set up territory group matching rules, which are the qualifiers used to capture other customers, leads, and opportunities matching to the same named account.
 - a. Select Registry ID in order to use this identifier from Oracle Trading Community Architecture. You can use registry ID whether or not you have Dun & Bradstreet information. It is a very precise rule so it works best if your data is accurate with few duplicate records.
 - b. Select DUNS Number if you want the precise matching it provides. It is a very precise rule so it works best if your data is accurate with few duplicate records.
 - c. Select DUNS Number, Customer Name, and Postal Code to capture the precise organization by DUNS number as well as a range of customer names and postal codes.
 - d. Select Customer Name and Postal Code to capture a range of business names and postal codes. This choice will pick up the duplicate records in your database where users entered multiple instances of the same customer name.
 - e. If you selected the Generate Catch All box, then you need to choose the resource from the LOV to assign to the catch all territory. Optionally, enter the name of a workflow for catch all transactions. Do not select a resource or enter a workflow if you deselected Generate Catch All.

12. Click **Next**.

The Assign Sales Management page appears.

13. 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.

14. Click **Next**.

The Add Organizations page appears. You can skip steps 15 through 17 and perform them later or use the export/import method. (See [Section 6.5, "Promoting Organizations to Named Accounts Using Spreadsheet"](#) for the export/import procedure.)

15. 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.

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

17. Click **Add to Territory Group**.

The selected organizations appear in the territory group list at the bottom of the page. The maximum number of organizations you can add before going on to the next step is 1000.

18. 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, concurrent programs generate a set of sales territories similar to those created manually in the Oracle Territory Manager Forms windows. The application generates territories for each named account utilizing the definitions 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. The ranking you see in Forms is the rank you assigned plus 20.

6.4 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. This procedure is optional.

Note: If the matching rule for the territory group is DUNS Number only or Registry ID, then there is nothing to map and you can skip this procedure.

Prerequisites

At least one territory group exists with a named account.

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. When you first map a named account the default is the business name followed by the trade name. After the first time, you must manually change the customer keyname.
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 request set *Generate Territory Details* must be run for your territory changes to be effective.

After the concurrent programs *Generate Territory Details* and *Territory Assignment Program* are 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.

6.5 Promoting Organizations to Named Accounts Using Spreadsheet

Export organizations to spreadsheet and then assign them to existing named account territory groups. This action promotes the organizations to named accounts within the assigned territory groups.

Prerequisite

Named account territory groups must exist

You must use Microsoft Internet Explorer as your browser.

Steps

1. In the Named Account page, click **Maintain Named Accounts**.

The Maintain Named Accounts page appears.
2. Select **Organizations**.

3. Click **Continue**.

The Define Export Criteria page displays advanced search fields.

4. Enter your search criteria.

5. Click **Export**.

The organizations appear in your spreadsheet.

6. Enter a territory group name in the To Territory Group field. You can type in the name, copy and paste from another cell, or double-click to use the LOV.

7. Optionally, select one or more salespeople using the LOVs. Be sure you assign salesperson, group, and role. You can only assign salespeople who have group and role access that is defined for the territory group. The application automatically assigns the owners of the territory group as Salespeople for the named account.

8. In Excel, select **Upload** from the **Oracle** menu.

Guidelines

The LOVs in the spreadsheet are not as restrictive as when you update information in the application. Therefore, any errors are caught during the upload process and error messages displayed in a column of the spreadsheet. The LOVs are not available when you work remotely.

6.6 Maintaining Named Accounts in Spreadsheet

Export named accounts to Microsoft Excel and perform all of your activities in the spreadsheet before uploading to create the territory changes. You can remove named accounts from territory groups, transfer named accounts between territory groups, and update sales team assignments.

Prerequisite

Named account territory groups must exist

You must use Microsoft Internet Explorer as your browser.

Steps

1. In the Named Account page, click **Maintain Named Accounts**.

The Maintain Named Accounts page appears.

2. Select Named Accounts.

3. Click Continue.

The Define Export Criteria page displays advanced search fields.

4. Select a territory group and country to export.

5. Optionally enter or select other search criteria.

6. Click Export.

The named accounts appear in your spreadsheet.

7. To delete a named account from a territory group change No to Yes in the Delete From Territory Group column.

8. To transfer a named account to a new territory group enter a territory group name in the To Territory Group field. You can type in the name, copy and paste from another cell, or double-click to use the LOV. Remember to assign a new sales team if needed or assign the territory group owner to the named account if there is no sales team.

9. To update the sales team select one or more salespeople using the LOVs. Be sure you assign salesperson, group, and role. You can only assign salespeople who have group and role access that is defined for the territory group. The owners of the territory group are automatically assigned as salespeople. To remove them as salespeople you must remove them as owners of the territory group by updating the definition of the territory group.

10. In Excel, select Upload from the Oracle menu.

Guidelines

The LOVs in the spreadsheet are not as restrictive as when you update information in the application. Therefore, any errors are caught during the upload process and error messages displayed in a column of the spreadsheet. The LOVs are not available when you work remotely.

6.7 Creating Geography Territory Groups

When you create a geography territory group you specify geographies (state, city, postal codes) assigned to a salesperson. You designate sales roles for each territory group and define what access each sales role has to leads, opportunities, or accounts. Use this procedure to create a geography territory group and designate specific geographies to be included in the territory group.

Prerequisites

A territory must exist in one of the top 5 levels of the hierarchy to be used as the parent territory.

Steps

1. In the Territory Group page, click **Create Geography Territory Group**.

The Create Territory Group: Enter Details page appears.

2. Enter a unique 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. The parent territory must be in one of levels 1 through 5 of the hierarchy and must be created using Forms.
4. Enter a rank for the territory group.
5. Optionally, enter the number of winners. If you leave this field blank, then the number of winners is defaulted from the parent territory.
6. Enter a start date for the territory to be active.
7. Optionally, enter an end date after which the territory group becomes inactive.
8. Click **Next**.

The Define Role Access page appears.

9. 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.
 - c. If the role has lead or opportunity access type, 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 Assign Sales Management page appears.

10. 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. Add rows to add sales managers to this territory group.

11. Click **Next**.

The Select Geography page appears.

12. Define the geography for the Territory Group by adding rows to add either geography values (such as state or country) or postal code ranges, or both.

13. Click **Finish**.

The Territory Group page displays the list of territory groups, both named account and geography.

Behind the scenes, concurrent programs generate a set of sales territories similar to those created manually in the Oracle Territory Manager Forms windows.

6.8 Updating Territory Groups

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

Steps

1. Select the Territory Group tab.

A list of territory groups appears, both named account and geography territory groups.

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 Territory Group Enter Details page appears.
- 4.** Step through each page using the Next button and make your changes. (See [Section 6.3, "Creating Named Account Territory Groups"](#) or [Section 6.7, "Creating Geography Territory Groups"](#) for details about these pages.)

6.9 Deleting Named Accounts from Territory Groups

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

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**.

6.10 Deleting Territory Groups

Use this procedure to delete a 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.

6.11 Monitoring the Named Account Setup Process

Use this procedure to check the status of named accounts.

Steps

1. Select the Dashboard subtab.

The dashboard lists the territory groups, the number of named accounts in each named account territory group, 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.

6.12 Checking for Named Account Overlap

The Overlapping Territory Group Report lists named accounts that are included in more than one named account territory group. You can run the report for a territory group you recently created to find out if any of the named accounts in that territory group also appear in other territory groups, and then fix the problem. If a dispute or question arises about a named account, you can run the report by the named account name or DUNS number to display every territory group that named account is part of.

Navigation

Dashboard > Dashboard

Steps

1. Click **Overlapping Territory Group Report**.
2. Enter one parameter.
3. Click **Run**.
4. Select the language and viewer type.
5. Click **Next**.

The report information appears in your selected viewer. Each named account that appears in more than one territory group is listed. Columns show each territory group (up to five) the named account is a member of.

6.13 Reviewing the Named Account Sales Team

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

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, including sales team information.

6.14 Using the Sales Team Lookup

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

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

Oracle Territory Manager assigns business objects (customers and leads, for example) to resources based on configurable business rules. It defines who owns what. 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 the 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 "=". You can use the Between operator for less than or greater than. For example, Between 0 and 5000000 or Between 5000000 and 9999999999.
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

7.2.1.2 Customer Name and Customer Name Range

Among all the transaction qualifiers, there are two 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 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 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, except for the Sales and TeleSales usage.

For the Sales and TeleSales usage only, you can set the number of winners separately from the top level territory down four levels (total of five levels). The number of winners applies to the next level of territories only. If you do not set the number of winners for a territory it defaults to the number of winners for its parent.

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 same level of the territory hierarchy. Lower levels in a hierarchy always win over higher levels.

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

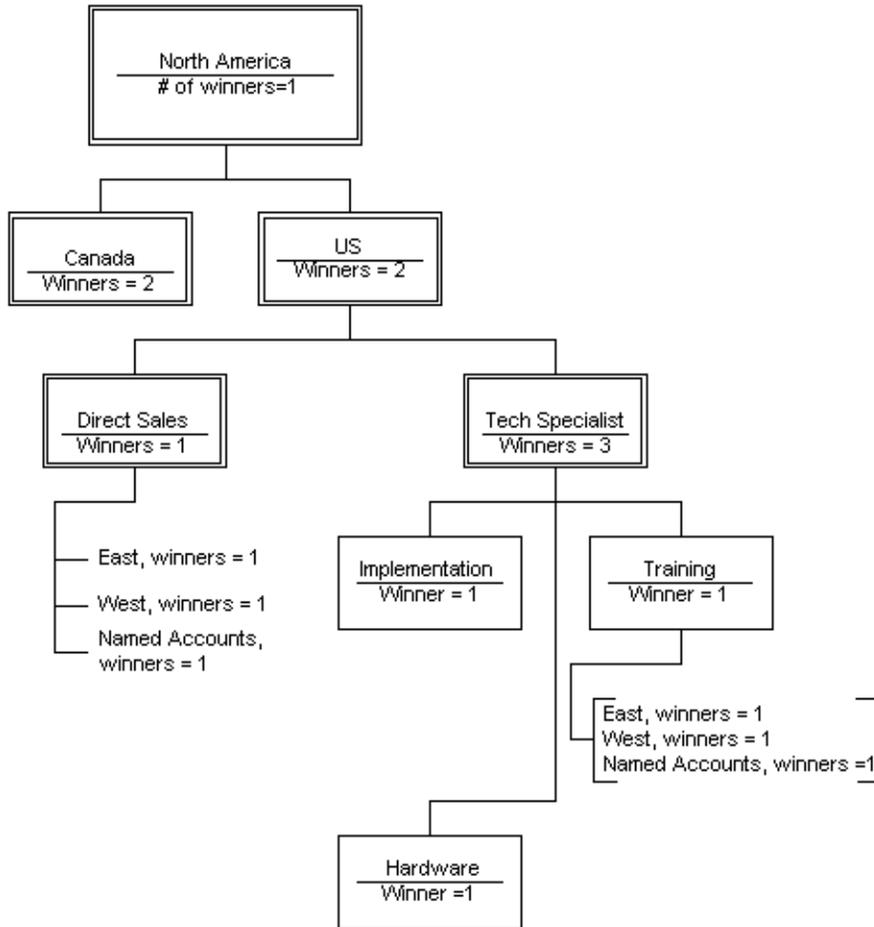
The winner is Territory 2.

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

7.4.1 Number of Winners for Sales and TeleSales Usage

The levels of a territory hierarchy typically mimic the sales organization. A lead, opportunity, or customer traverses the hierarchy top down, selecting which path to take. As it traverses each level of the selling organization hierarchy, for the first 5 levels there can be different numbers of winners. The number of winners applies to the next level of territories only.

For example, the territory for North America is set for one winner so either US or Canada wins. The US territory is set for two winners so that both the direct sales territory and the technical specialist territory win the same customer. The following diagram shows this example.



For territories beyond level 5, the numbers of winners is defined at level 5. For example, if North America, in the diagram, had a parent territory called The World, then North America would be at the second level of the hierarchy, then level 3 is US and Canada, level 4 is Tech Specialist or Direct Sales, level 5 under Tech Specialist is Training, Implementation, and Hardware, and the territories for East, West, and Named Accounts under Training are set at 1, the same number of winners as Training.

If you do not set the number of winners for a territory it defaults to the number of winners for its parent.

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 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 four seeded transaction types: account, lead, quoting, and opportunity. 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 subset 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 Manager 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.

For the Sales and TeleSales usage only, you can set the number of winners separately from the top level territory down four levels (total of five levels). The number of winners applies to the next level of territories only. If you do not set the number of winners for a territory it defaults to the number of winners for its parent.

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 (such as 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

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.

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.

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.

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.

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.

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.

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.

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.

A

Additional Territory Creation Methods

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

- [Section A.1, "Creating Territory Types"](#)
- [Section A.2, "Creating a Territory Using a Territory Type"](#)
- [Section A.3, "Creating a Template"](#)
- [Section A.4, "Creating Mass Territories with a Template"](#)
- [Section A.5, "Creating Escalation 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

- You must enable your qualifiers.
- You must have a territory type.

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.

- b. Click **Save** from the toolbar to save the territory overview information.

3. Select the Transaction Qualifiers tab.

You need to assign the value of each transaction qualifier specified in the selected territory type.

You cannot add additional transaction types and qualifier's names during territory creation. For example, if a service territory type has an "Account" transaction type and a "Country" transaction qualifier name specified, then you can only use the same "Country" qualifier name and assign different values to this qualifier, such as "Country = America" or "Country = Australia." You cannot add another qualifier name, such as "State", or another transaction type, such as Task, during territory creation.

- a. Select the appropriate value in the Operator field for the selected qualifier's name.
 - b. Select the appropriate value in the Value From or/and Value To field(s) for the selected qualifier's name.
 - c. Click **Save** from the toolbar to save the transaction qualifier information.
4. (Optional) Select the Resource Qualifiers tab if necessary. Use the same steps identified in the procedure of Creating Individual Territories to enter resource qualifier information in the Resource Qualifiers tab.
 5. Select the Resources tab.

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

A.3 Creating a Template

Use this method for creating large numbers of territories at the same time. Suppose you have two large customers and you wish to create a territory for each of them for every state in the United States. Creating individual territories requires you to repeat the same procedure 100 times, once for each of the 50 states for each company. Using a territory template, you can create all of the 100 territories at the same time. If you use a territory type and also add resource qualifiers in your template, then the system creates the territories automatically with resource qualifiers identified.

Use the following tabs to create territory templates:

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

- 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.

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.

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.

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.

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