

Oracle® Territory Manager

Implementation Guide

Release 11*i*

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Oracle Territory Manager Implementation Guide, Release 11i

Part No. B12220-03

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

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Preface

Intended Audience

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

How To Use This Guide

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

- Chapter 1 introduces the application and what is new in this release.
- Chapter 2 provides information about dependencies for the application.
- Chapter 3 lists the sequence of tasks needed to implement the application.
- Chapter 4 covers the planning phase of the implementation and includes qualifiers.
- Chapter 5 explains how to enable qualifiers and create territories.
- Chapter 6 provides the procedures for creating self service named account territories.
- Chapter 7 provides the procedures for creating self service geographic territories.
- Chapter 8 covers verifying the implementation and troubleshooting tips.

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 11i versions of those guides.

Online Documentation

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

See Related Documents on page x for more Oracle Applications product information.

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/>

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Structure

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- 3 Implementation Overview
- 4 Territory Planning
- 5 Setting Up Territories
- 6 Creating Self Service Named Account Territories
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Related Documents

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 User Guide

This guide contains procedures for updating and managing territories.

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 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications 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 *OracleMetaLink*.

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 Oracle8i server, and your hardware and software environment.

OracleMetaLink

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form 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.

Introduction

This chapter covers the following topics:

- Overview of Oracle Territory Manager
- New in this Release

Overview of Oracle Territory Manager

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: High-tech companies within a specific geographic area. This territory is defined using the following qualifiers:

- Account Classification = High Tech
- State = California

The resource assigned to the territory is Joe who is assigned to Sam's sales group. When the correct assignment engine is run Joe is assigned to all high-tech companies that have an address in the state of California. Because Joe is assigned to Sam's sales group his manager and the other resources assigned to his group can be granted access to these same companies, if the correct profile options are set up to do so.

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

See *Running Concurrent Programs*, page 5-13 for more information about concurrent programs. Additional information on concurrent programs for sales is in the "Setting Up

and Using Territory Assignment Program (TAP)" section of either the *Oracle Field Sales Implementation Guide* or the *Oracle TeleSales Implementation Guide*.

Components

Territory implementations use all or a subset of the following components to build territories:

- Forms based Territory Navigator: Administrators create and manage territory hierarchies, territories, and qualification rules, and assign resources.
- Self Service Named Accounts: Optional. Sales administrators use the HTML pages to create territory groups and named accounts. Sales managers then assign their named accounts to individual sales representatives. Sales managers use the alignment tool to create what-if territories and compare them.
- Self Service Geographic Territories: Optional. Sales administrators start the process and sales managers create geographies and assign salespeople.
- Concurrent programs enable territory definitions.
- The territory lookup tool in HTML is available for anyone to look up the salespeople assigned to an account.

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.

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.

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.

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.

Oracle Territory Manager 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
- Export to spreadsheet for territory maintenance
- HTML based creation and distribution of geographic territories
- Configurable territory exception handling through Oracle Workflow
- Territory diagnostics

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 Oracle *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

Verify Mandatory Dependencies

This chapter covers the following topics:

- Oracle Territory Manager Mandatory Dependencies
- Oracle Territory Manager Optional Integrations

Oracle Territory Manager Mandatory Dependencies

The following are the modules that Oracle Territory Manager depends upon:

- **Oracle Application Object Library (AOL):** Territory Manager uses AOL to manage responsibilities that are used in various modules.
- **Resource Manager:** Territory Manager uses resources defined in the Resource Manager to assign resources to a territory.

Oracle Territory Manager Optional Integrations

The following modules are required for specific features to work:

- **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 Field Sales or Oracle TeleSales:** Named account alignment metrics depend upon past opportunity data. (Required for Named Account Territory Alignment.)
- **Trading Community Architecture (TCA):** TCA provides the DUNS number, DNB annual revenue, and DNB number of employees. (Required for Named Accounts if you want to use this information.)

Implementation Overview

This chapter covers the following topics:

- Process Description
- Implementation Task Sequence
- Multi-Org

Process Description

Before using the Oracle Territory Manager, your functional implementation team must analyze your business and organization needs. This step is key before implementing the application.

Based on planning decisions, the implementation team enables seeded qualifiers to be used in defining your territories.

The territory administrator then begins the territory creation process, according to the implementation.

If you implement named accounts for sales, then the administrator creates territory groups, selecting named accounts, and assigning them to the top level of sales management. Sales managers in turn assign the named accounts to the salespeople or sales managers who report to them. The next level of sales managers in turn assign named accounts to their directs.

After territories are manually created, you can search and view territory hierarchies through either the Administration menu or the Navigator tree. The territory administrator must run the *Generate Territory Packages* concurrent program to generate territories before modules can assign resources defined in your territories.

The process for self service territories (named accounts and geographies) requires territory administrators to run the *Generate Territory Details* concurrent program request set which automatically generates the territories. The territories are visible from the Forms user interface in read only mode.

Oracle Territory Manager is implemented in the following four phases:

Phase I: Territory Planning

In Phase I, your implementation team analyzes business and organization needs and plans territories accordingly.

Phase II: Setting Up Territories

In Phase II, the territory administrator starts the territory creation process based on territory planning. If you plan to implement sales territories, then you also need to set up the Territory Assignment Program per the steps provided in either the *Oracle Field Sales Implementation Guide* and the *Oracle TeleSales Implementation Guide*.

Phase III: Creating Named Account Territories

Phase III is optional. If you have sales territories and your planning includes the use of named accounts, then the territory administrator and sales managers use the self-service application to create named accounts and territory groups for sales. Named accounts can also be created using the Territory Navigator instead of through the best practice self service option.

Phase IV: Creating Geographic Territories

Phase IV is optional. If you have geographic sales territories, then the territory administrator and sales managers use the self-service application to create geographic territory groups and territories for sales. Geographic territories can also be created using the Territory Navigator instead of through the best practice self service option.

Phase V: Managing Territories

In Phase V, the territory administrator manages territory changes, such as copying an entire territory or mass change territory resources if needed. In addition, the administrator can run territory reports to verify territory change information. See the *Oracle Territory Manager User Guide* for more information.

After updating existing territories, the *Generate Territory Packages* concurrent program still needs to be run to generate the manually updated territories or run *Generate Territory Details* to generate both named account territories and manually created territories.

Implementation Task Sequence

The following tables describe the order and process of implementing Oracle Territory Manager.

Phase I: Territory Planning

| Step | Description | Forms or HTML | Performed By |
|--------------------|---|----------------------|---------------------|
| Territory Planning | <p>Analyze the territory setup in your organization before utilizing Territory Manager. You need enterprise-wide cooperation and feedback.</p> <p>You must expect to make multiple territory revisions in the early months of operation as your enterprise discovers omitted information or territories that do not work on a day-to-day basis.</p> | On paper | Implementation Team |

Phase II: Setting Up Territories via Territory Navigator

| Step | Description | Forms or HTML | Performed By |
|--------------------------------|---|----------------------|---------------------|
| Enable Qualifiers | Use qualifiers as the criteria to create a territory. | Forms | CRM Administrator |
| Create Territories | Create territories for a variety of transactions. For example: account, lead, opportunity, and service requests. | Forms | CRM Administrator |
| Activate Territory Definitions | <p>Run the concurrent program <i>Generate Territory Packages</i> after creating or modifying your territories.</p> <p>This allows the system to compile the business rules defined during territory creation. If this step is not completed, the territories will not work correctly.</p> | Forms | CRM Administrator |

Phase III: Creating Self Service Named Account Territories (Optional, Sales only)

| Step | Description | Forms or HTML | Performed By |
|--|--|----------------------|------------------------------------|
| Enable Qualifiers | For example, enable the CUSTOMER NAME RANGE and POSTAL CODE qualifiers. | Forms | CRM Administrator |
| Set Up Dun & Bradstreet Data | Perform the set up before importing purchased Dun & Bradstreet data in Trading Community Architecture if you want to use DNB data for named accounts. | Forms | Trading Community Manager |
| Set Up Alignment | Set up integration with Trading Community Architecture to provide the information needed for the metrics used in named account territory alignment. | Forms | Trading Community Manager |
| Create a Parent Territory | Create a territory to act as the parent for the named account territories | Forms | CRM Administrator |
| Set Up Export | Install and set up Oracle Web Applications Desktop Integrator. | | Implementor |
| Set Up Proxy User | A user who is a member of a sales group and who is assigned the proxy user role can assign the named accounts or geographic territories owned by the manager of that sales group to any member of the sales group hierarchy that reports up to that manager. | | Administrator |
| Create Territory Groups and Named Accounts | Create territory groups and assign resources and named accounts to the territory groups. | HTML | Territory HTML Sales Administrator |

| Step | Description | Forms or HTML | Performed By |
|--|---|---------------|---|
| Align Named Accounts, Compare and Activate | (Optional) Create alignments, compare them until you find the best alignment, then activate it to create the territories and assignments. | HTML | Territory HTML Sales User (Sales Managers) |
| Assign Named Accounts to Salespeople | Sales managers assign named accounts to their direct reports. Alignments can be used instead to create the assignments. | HTML | Territory HTML Sales User (Sales Managers, Proxy Users) |
| Activate Territory Definitions | Run the concurrent program request set <i>Generate Territory Details</i> after creating or modifying your territories. This allows the system to compile the business rules defined during territory creation. If this step is not completed, the territories will not work correctly. | Forms | CRM Administrator |

Phase IV: Creating Self Service Geographic Territories (Optional, Sales only)

| Step | Description | Forms or HTML | Responsibility |
|---------------------------|--|-----------------|------------------------|
| Load Geographic Data | You need to purchase geographic data (postal codes, state, city, country) and load it into the table used by self-service geography. | Use Public APIs | Database Administrator |
| Enable Qualifiers | You must minimally enable CUSTOMER NAME RANGE and POSTAL CODE qualifiers. | Forms | CRM Administrator |
| Create a Parent Territory | Create a territory to act as the parent for the geographic territories. | Forms | CRM Administrator |

| Step | Description | Forms or HTML | Responsibility |
|------------------------------------|---|----------------------|--|
| Set Up Export | Install and set up Oracle Web Applications Desktop Integrator. | | Implementor |
| Set Up Proxy User | A user who is a member of a sales group and who is assigned the proxy user role can assign the named accounts or geographic territories owned by the manager of that sales group to any member of the sales group hierarchy that reports up to that manager. | | Administrator |
| Create Geographic Territory Groups | Create territory groups and assign resources to the territory groups. | HTML | Territory HTML Sales Administrator |
| Create Geographic Territories | Create the territory names, then export unassigned postal codes and assign territories and resources, then import. | HTML | Territory HTML Sales User (Sales Managers) |
| Activate Territory Definitions | Run the concurrent program request set <i>Generate Territory Details</i> after creating or modifying your territories. This allows the system to compile the business rules defined during territory creation. If this step is not completed, the territories will not work correctly. | Forms | CRM Administrator |

Phase V: Managing Territories via Territory Navigator

| Step | Description | Forms or HTML | Performed By |
|--------------------------|--|----------------------|---------------------|
| Copy an Entire Territory | Use to copy an entire territory hierarchy with or without resources, or copy a territory with resources. | Forms | CRM Administrator |
| Run Territory Reports | Run reports to track your selections and changes. | Forms or HTML | CRM Administrator |

Phase V: Managing Self Service Territories

| Step | Description | Forms or HTML | Responsibility |
|--------------------------------|---|----------------------|---|
| Resource Reassignment | Mid year resource adjustments are accomplished through the self service interface directly by sales managers or proxy users. | HTML | Territory HTML Sales User (Sales Manager, Proxy User) |
| Named Account Rule Refinement | Refinement needed depends upon the matching rule selected. DUNS # matching requires no maintenance as long as the named account has a DUNS #. Customer name range and postal code matching may require further manual refinement. These definitions persist across selling years as long as the named account persists. | HTML | Territory HTML Global Sales Administrator |
| Activate Territory Definitions | Run the concurrent program request set <i>Generate Territory Details</i> after creating or modifying your territories. This allows the system to compile the business rules defined during territory creation. If this step is not completed, the territories will not work correctly. | Forms | CRM Administrator |

Multi-Org

You are not required to set up territories by Operating Unit (OU) in a multi-org (MO) environment. You can create a World-Wide territory hierarchy by picking one OU and then creating all your territory definitions (for all countries) under that OU. This way your World-Wide hierarchy is visible under that single OU. This means you can create a single responsibility for that OU for your territory administrators.

The only reason you may want to define territories in separate OUs is if you are concerned about security and do not want users from different OUs to access one another's territory definitions.

The actual territory assignment processes are accomplished across all OUs simultaneously. When you assign a business object, such as an account, it looks at all territories: it does not care about the OU for the territory, only that it matches the territory qualifier values.

Territory Planning

This chapter covers the following topics:

- Planning Your Territories
- Sales Territory Planning Example
- Step 1: What business objects are we assigning?
- Step 2: What qualifiers should we use?
- Step 3: Territory hierarchy - Define date effectivity and number of winners
- Step 4: Territory hierarchy – Placeholder territories
- Step 5: Implement Self Service
- Step 6: Territory hierarchy – Define Catch Alls
- Step 7: How to implement named account territories
- Step 8: How to implement geographic territories
- Step 9: How to support overlays
- Step 10: What is an appropriate territory hierarchy for overlays?
- Step 11: What rank should each territory have?
- Step 12: Have you met all your business requirements?
- Leverage Territory Hierarchies and Inheritance
- Leverage Territory Ranking and Number of Winners
- Choosing Appropriate Qualifiers
- Qualifier Rules
- Migrating Territories
- Sales Qualifiers
- Service Qualifiers
- Oracle Partner Management Qualifiers

Planning Your Territories

The planning phase is the most important step in territory setup. Before using Oracle Territory Manager, a territory planning team should be established to analyze

the territory setup in your organization. This territory planning process needs enterprise-wide cooperation and feedback.

Note: Multiple territory revisions in the first months of operation should be expected as your enterprise discovers omitted information or territories that do not work on a day-to-day basis

Based on your business needs, your team needs to determine the following:

- Usage: What applications need territories?
- Transaction Type (which is based on usage): for example, leads, opportunities, service requests, and delinquencies.
- How many territories are needed?
- What transaction qualifiers should be enabled?
- What resources should be attached to the territories?
- What should the territory hierarchy structure be?
- How many winners are allowed? A winner is the territory that receives the transaction or customer.
- How are winning territories determined?
- Will Sales implement named account territories?
- Do you want to implement self service territory deployment?

This list is not all-inclusive and planning factors depend on your business needs.

Perform the following steps to plan your territories. This procedure is usually done in a group with pen and paper.

Steps:

1. Review your existing territories.

You need the following types of information:

- What is your usage? In other words, what business applications are you building territories for? For example, Oracle Field Sales, Oracle TeleSales, Oracle Collections, or Oracle Service.
- What transactional objects within your chosen usage are you assigning resources to? This is your transaction type. For example, for Sales, it is account, opportunity, or lead.
- How are your territories currently assigned (by state, by industry, by zip code, by account, and so on)?
- Is Sales currently using named account territories, even if being manually maintained?
- What are the names and current territory assignments for your sales or service personnel?
- What are the names of employees in other organizations who receive account, lead, and opportunity information and how is that information accessed and used?

- What are your products and how are they differentiated?
2. Decide what qualifiers you want to use to assign objects to territories.
 3. Decide on the hierarchy of territories.
 4. Decide what qualifier values to use for assigning resources to territories.
 5. Identify any overlapping territories and decide the order in which the application chooses them.

Rank any overlapping territories from 1 to N to determine the order. A territory with a lower number wins over a territory with a higher number rank within the same level of the hierarchy. In case of a tie, the assignment is made randomly.

6. Decide how many territories will win. For example, do you need one territory to win, which can be appropriate for service, or multiple winners, which can be appropriate for sales?
7. Decide if named account territories are needed.
8. Decide if you will use self service deployment for named account or geographic territories.
9. Test the strategy before implementing territories throughout the company and consider any future territory maintenance efforts.
10. Consider future territory maintenance efforts.

Note: Remember that the first territory setup is not necessarily the one that works best. You achieve optimum territory definition only gradually after much fine-tuning to accommodate user reactions and various interests in your organization.

Sales Territory Planning Example

This territory planning example utilizes best practices for a fictitious company with a typical sales model involving named accounts and geographic territories with overlay sales organizations.

Business World is a large manufacturer of computer equipment selling in the US and Canada. They organize their products into three families: servers, desktops/laptops, and storage. In their direct sales model, Business World has a named account sales force consisting of an account manager working specific accounts, and a telephony sales force working the remaining general pool of customers. A product overlay sales force works with account managers and telesales reps based on what products a customer is interested in. Each account manager or telesales representative works with three overlay specialists, one for each product family. In planning for FY2004, Business World is expected to have the following:

- US and Canada have separate sales forces
- The direct sales forces manage their top 200 key accounts
- The general business telesales forces manage their remaining customer pool
- The overlay sales forces service all opportunities for a product family and associated customers. There are 3 types of product specialists: Server, Desktop/Laptop, and Storage product specialists.

The following table shows the sales model:

Sales territory model

| Role | US | Canada | Comments |
|-----------------------------|--|--|--|
| Account Managers | 15 account managers manage 150 large, key customers | 5 account managers manage 50 large, key customers | Account manager territories encompass all leads and opportunities associated to a key customer. |
| Telesales Representatives | 6 Telesales representatives in 6 geographic territories | 3 Telesales representatives in 3 geographic territories | Telesales representative territories encompass all leads and opportunities associated to a customer. |
| Overlay Product Specialists | 3 product families, 9 product specialists for each product family and region | 3 product specialists. Product specialists cover their mutually exclusive product families for the entire country. | Product specialists service all opportunities for a product family and geographic location and their related customers (they are only allowed to view customer information). Each account manager and telesales representative has a Server, Desktop/ Laptop, and Storage product specialist. |

Step 1: What business objects are we assigning?

Which business objects (transaction types) are being assigned to each type of resource? Are we defining territories to access customers, leads, or opportunities for account managers, telesales reps, and product specialists? Do you need to provide read access only or update privileges as well? To what territory usage are the business objects associated?

Business World is going to assign customer, lead, and opportunity transaction types for all territories assigned to account managers and telesales reps.

Territories assigned to overlay product specialists will have a transaction type of opportunity because they need update privileges for opportunities. Oracle Sales products (Field Sales and TeleSales) provide, by default, read only access to customers if a resource is assigned to the sales team of any of the customer's opportunities.

Investigate how to set up Oracle Territory Manager business objects in conjunction with the Oracle Sales data security model. If you need update access to customers, leads, or opportunities in Oracle Sales or Oracle TeleSales, then you will need to assign them in Oracle Territory Manager.

Step 2: What qualifiers should we use?

We enable the following qualifiers:

- CUSTOMER NAME RANGE, to identify the 200 named accounts
- COUNTRY, because this qualifier is used as a first criterion in identifying territory and offers the ability to support “Catch All” territories
- POSTAL CODE, to create geographic territories composed of postal codes. One can use less granular geographic qualifiers such as state or province as well.
- STATE, to create geographic “Catch All” territories for overlay product specialists
- OPPORTUNITY EXPECTED PURCHASE, to create overlay territories for product specialists.

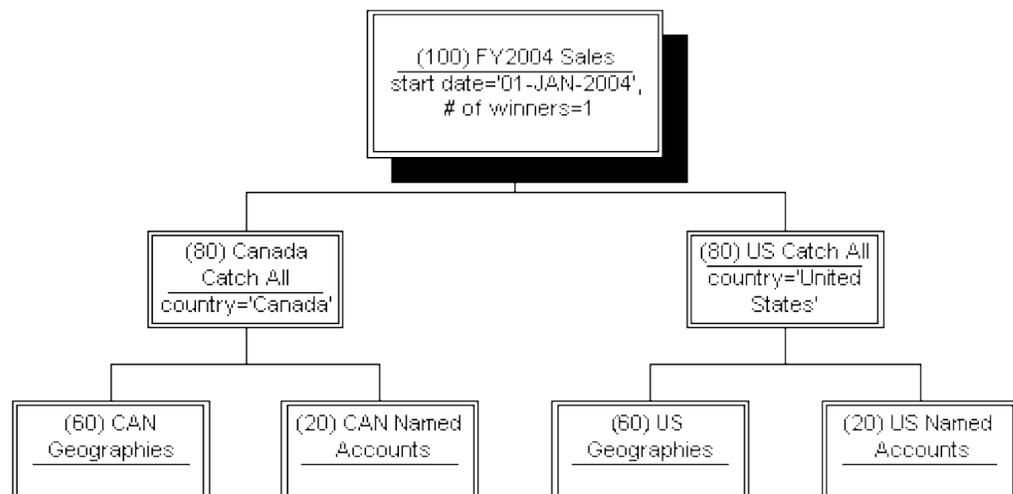
Review Choosing Appropriate Qualifiers, page 4-14 to analyze your particular situation in greater detail.

Step 3: Territory hierarchy - Define date effectivity and number of winners

The hierarchy is largely designed for ease of maintenance and for the creation of “Catch All” territories. Hierarchies allow you to inherit qualifier rules and territory properties such as date effectivity and number of winners. Catch alls will be discussed later in Step 4.

For the Sales and TeleSales usage, different territory structures are supported for a business unit by selecting an independent number of winners within the top five levels of the territory hierarchy. See Winning Territory Rules, page 5- 4 for more information.

Under the Sales and TeleSales usage, we need to create a top-level territory representing Business World’s FY2004 Sales territories. This FY2004 Sales territory will be effective from January 1, 2004 and does not have any transactional qualifier rules or resources. It is the top of the FY2004 Sales territories and is used to maintain the date effectivity of all territories underneath it and is used to set the number of winning territories (number of winners = 1).



Step 4: Territory hierarchy – Placeholder territories

Sometimes we create territories purely for organization and ease of maintenance. The territories under the US Catch All territory are an example of this.

Within the US and Canada, there are named account sales forces and geographic sales forces. We create two territories under the US Catch All territory:

- US Named Accounts, with no transactional qualifiers or resources
- US Geographies, with no transactional qualifiers or resources

Similarly, Canada has 2 territories called CAN Named Accounts and CAN Geographies underneath the Canada territory.

Step 5: Implement Self Service

Oracle Territory Manager supports the self-service deployment of named accounts and geographic territories. Following are some things to consider before deciding whether or not to utilize this feature:

1. How often do your named account assignments change? If they change frequently, then a self service deployment is recommended.
2. How large is your territory administration staff? What is the required timeliness of activating territory reassignments? How important is it to expose territory ownership to the sales force?

If representatives have very few named accounts and there is little change, then the self service deployment may not be necessary. However, we believe visibility to clear ownership is a best practice.

3. How many named accounts do you have? At what granularity do you need to define named accounts, for example, by customer name range and country or by customer name range and postal code?

If you defined your named accounts by customer name range and country and have a manageable number of customers, use the Forms Navigator to create your territories. If you have many named accounts and need to define territories by customer name range and postal code, then use self-service named account territory management.

The process to create named account or geographic territories is the same whether you create them manually through the Territory Navigator or through self service flows. The difference is that the self service flows automatically generate the territory structure and definitions rather than manually in the Territory Navigator.

Self service allows your total cost of ownership to decrease, reduces your time to implementation, and at the same time empowers your sales management with the ability to manage their own territory distribution and midyear adjustments. Steps 6 (Define Catch Alls) to 11 (Rank) are still relevant regardless of your implementation, but can be managed and generated through the self service flows for geographic and named account territories. Review *Creating Self Service Named Account Territories*, page 6- 1 and *Creating Geographic Territories*, page 7- 1 from a planning perspective.

Step 6: Territory hierarchy – Define Catch Alls

Business World has separate sales forces for US and Canada so we will create two child territories underneath FY2004 Sales; one called US with a transaction qualifier rule COUNTRY = 'UNITED STATES' and another called Canada with a transaction qualifier rule COUNTRY = 'CANADA'. The COUNTRY qualifier rules will be inherited by all child territories, easing maintenance. These two territories will also serve as "Catch Alls" for exceptions of the assignment process. These are important because customers, leads or opportunities that do not find matching leaf node territories will fall into these "Catch All" territories based on their country qualifier and can be assigned to a designated owner (typically the territory administrator) for resolution. The territory administrator should have customer, lead, and opportunity access.

Catch Alls are used to "catch" business transactions that fall through the cracks (leaf node territories) and usually are assigned to territory administrators. To be more exact, they "catch" all business transactions that fall into the catchall territory itself or any territory below it in the hierarchy that does not have a resource.

It is recommended that you use the term "Catch All" in the naming of these territories to help visually distinguish this type of territory.

Step 7: How to implement named account territories

From a business perspective, there are various types of territories. Organizations will pull particular customers from the general pool that they deem as critical and assign a specific resource to it. These are termed "named accounts". In an attempt to organize the remaining pool of customers, general business customers are segmented by a simple criteria such as SIC code, state, or area code.

Named account territories may have rules utilizing the CUSTOMER NAME RANGE qualifier in combination with a geographic qualifier such as state or country. For example, if IBM is a named account you define a territory with CUSTOMER NAME RANGE like 'IBM%' and CUSTOMER NAME RANGE like 'International Business Machines%'. This assigns IBM to the account manager regardless of how many customers exist that begin with IBM or International Business Machines.

The US direct sales force consists of 15 account managers, each responsible for a territory of large key accounts. There will be 15 US named account territories as children of the US Named Accounts territory, one for each account manager. There will also be a catch all territory for the US named accounts. Similarly there will be 5 Canadian named account territories as children of the CAN Named Accounts territory plus a catch all territory.

Lowest level territories or leaf node territories should always have resources assigned to them and therefore also require access types to be defined. All account managers are associated to territories with customer, lead, and opportunity access.

See Choosing Appropriate Qualifiers, page 4-14 for a discussion on the selection of qualifiers for named accounts.

Step 8: How to implement geographic territories

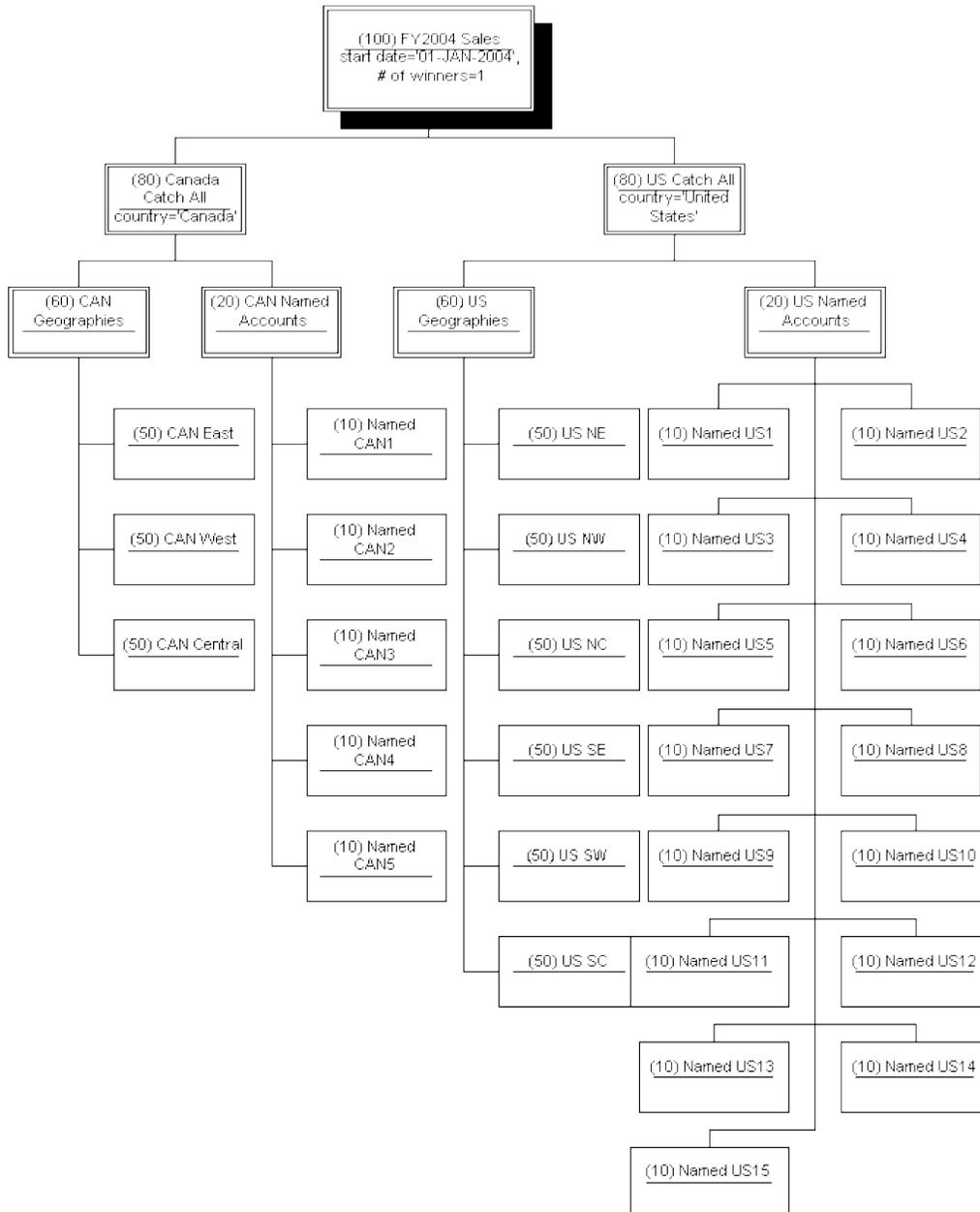
The decision to utilize geographic territories should be based on your business requirements. Following are questions to ask before implementing this type of territory:

1. What granularity is used to distribute your geographies?

- Do you distribute territories based on geographical requirements such as states, provinces, or postal codes? This will help determine what geographic qualifier you use.

In our test case the US and Canada each have separate telesales forces, which are responsible for all non-named accounts in a particular geography. The US telesales force has 6 geographic territories as children of the US Geographies territory. The Canada telesales force has 3 geographic territories as children of the CAN Geographies territory. Each geographic territory will have transactional qualifier rules containing the postal codes that the respective telesales representatives will be responsible for. All telesales representatives will be assigned customer, lead, and opportunity access.

The following chart displays this example.



Step 9: How to support overlays

We recommend that you implement Overlays in a separate territory hierarchy.

The desired business behavior is to find:

1. Either a named account OR a geographic general business territory
2. AND one overlay territory.

Increasing the number of winners in the FY2004 Sales hierarchy and putting the overlay territories underneath it would not accomplish this. However, with the FY2004 Sales hierarchy and number of winners set to one, Territory Manager selects either a named account territory or a general business territory. With a separate FY2004 Overlay hierarchy and number of winners set to one, Territory Manager selects a single overlay territory.

Under the sales usage, you will need to create another top-level territory representing Business World's FY2004 Overlay territories. This FY2004 Overlay territory will be effective from January 1, 2004 and does not have any resources. It does have transaction qualifier rules to distinguish it as an overlay hierarchy, for example:

OPPORTUNITY EXPECTED PURCHASE = 'SERVER',
OPPORTUNITY EXPECTED PURCHASE = 'DESKTOP',
OPPORTUNITY EXPECTED PURCHASE = 'LAPTOP',
OPPORTUNITY EXPECTED PURCHASE = 'STORAGE'.

It is the top of the FY2004 Overlay territories and is also used to maintain the date effectivity of all territories underneath it and is used to set the number of winning territories. Note the OPPORTUNITY EXPECTED PURCHASE qualifiers are necessary to distinguish these territories from Business World's geographic telesales territories.

Product specialists work opportunities, so we are going to assign Opportunity transaction types for all overlay territories.

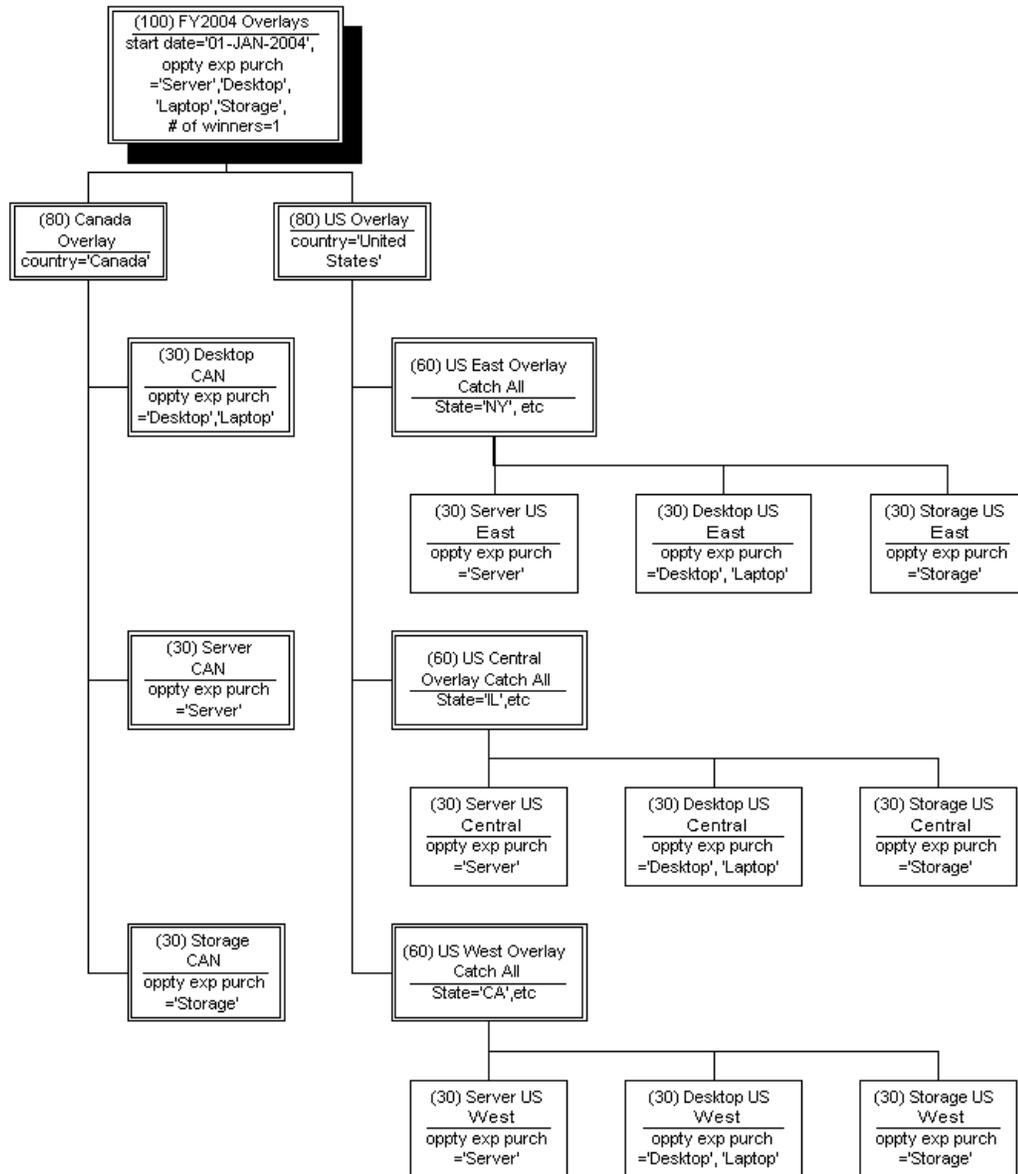
Step 10: What is an appropriate territory hierarchy for overlays?

We have separate sales forces for the US and Canada so we will create two child territories underneath FY2004 Overlay: one called USA Overlay with a transaction qualifier rule COUNTRY = 'UNITED STATES' and another called Canada Overlay with transaction qualifier rules COUNTRY = 'CANADA'.

Do you require Catch All territories and how are they organized? If Catch All territories are required, these need to be reflected in the hierarchy.

Is your sales management organized by product family or by geographic area? The territory hierarchy should closely mimic your sales management hierarchy for ease of understanding and maintenance.

Overlay territory hierarchy BY GEOGRAPHY



If Business World's overlay sales force is organized by geography and wants Catch Alls by geography, then we create three territories underneath the US Overlay territory:

- "US East Overlay Catch All", with transactional qualifier rules STATE = 'NY', STATE = 'NJ', STATE = 'MA', STATE = 'VT', and so on, and resource = Eastern Overlay territory administrator
- "US Central Overlay Catch All", with transactional qualifier rules STATE = 'IL', STATE = 'OH', STATE = 'AK', STATE = 'WI', and so on, and resource = Central Overlay territory administrator
- "US West Overlay Catch All", with transactional qualifier rules STATE = 'CA', STATE = 'NV', STATE = 'OR', STATE = 'WA', and so on, and resource = Western Overlay territory administrator

Similarly underneath the Canada Overlay territory, we create three territories:

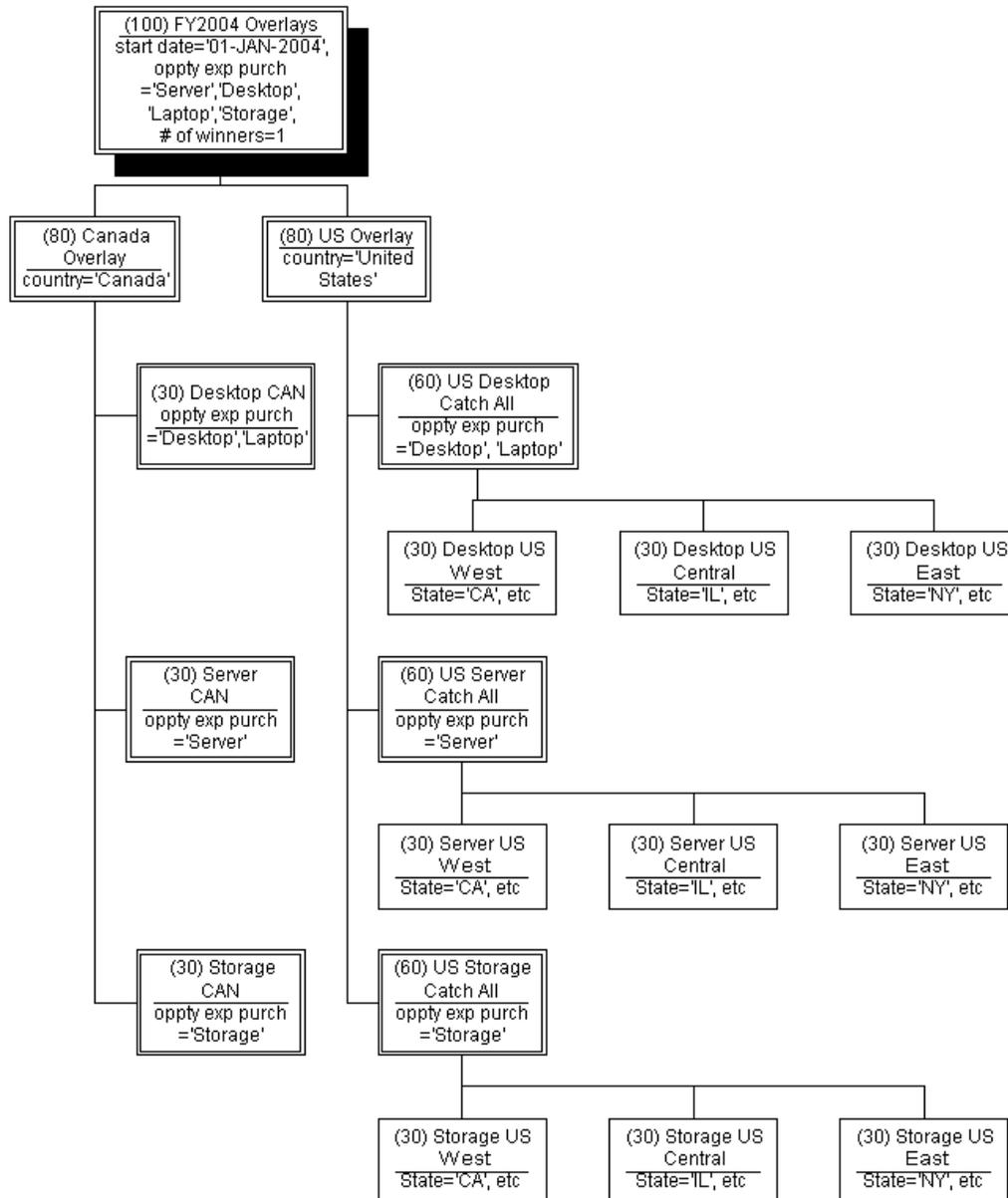
- “Server CAN”, with the transactional qualifier rule OPPORTUNITY EXPECTED PURCHASE = ‘SERVER’ and resource = Canadian server specialist
- “Desktop CAN”, with the transactional qualifier rule OPPORTUNITY EXPECTED PURCHASE = ‘DESKTOP’ and OPPORTUNITY EXPECTED PURCHASE = ‘LAPTOP’ and resource = Canadian desktop/laptop specialist
- “Storage CAN”, with the transactional qualifier rule OPPORTUNITY EXPECTED PURCHASE = ‘STORAGE’ and resource = Canadian storage specialist

As Canada has a smaller number of customers, three product specialists cover the entire country, one for each product family.

The US overlay sales force consists of nine product specialists, each responsible for a territory of product family and geography. As there is no fixed teaming of account managers or telesales reps to product specialists, we have chosen to implement the overlays separately as children of the country overlay territory. There will be nine US overlay territories as children of the US Overlay territory, one for each product specialist. Each specialist will cover one of three geographies: East, West, or Central.

All product specialists will be associated to territories with customer and opportunity access.

Alternative overlay territory hierarchy BY PRODUCT FAMILY



If Business World's US overlay sales force requires Catch Alls by product family or is organized by product family, we would create three territories underneath the US Overlay territory:

- "US Server Catch All", with the transactional qualifier rule OPPORTUNITY EXPECTED PURCHASE = 'SERVER' and resource = Server territory administrator
- "US Desktop Catch All", with the transactional qualifier rule OPPORTUNITY EXPECTED PURCHASE = 'DESKTOP' and OPPORTUNITY EXPECTED PURCHASE = 'LAPTOP' and resource = Desktop territory administrator
- "US Storage Catch All", with the transactional qualifier rule OPPORTUNITY EXPECTED PURCHASE = 'STORAGE' and resource = Storage territory administrator

The same 9 US overlay territories created in the first example are re-shuffled underneath the appropriate US product family Catch Alls.

Step 11: What rank should each territory have?

To the left of all the territory names in Figures 1, 2 and 3, is the rank of each territory. Named account territories are always ranked higher than geographic territories because a named account in California should fall in a named account territory and not the geographic territory that includes California. Catch Alls are always ranked lower than their associated territories. The rank applies to the territories on the same level in the hierarchy. Territories lower on a hierarchy always win over territories higher in the hierarchy. See Leverage Territory Ranking and Number of Winners, page 4-13 for a detailed discussion of territory rankings.

Step 12: Have you met all your business requirements?

Stand back and review your business requirements for sales territories. Ensure your territory implementation has met all your business requirements. How will you validate your territories are correct? Create and enable your territories on a test environment. Ensure you have an implementation plan in place that involves systematic validation and user acceptance testing. Don't forget about your ongoing maintenance requirements. See Migrating Territories, page 4-15 for a discussion on how to migrate territories from one year to the next.

For any implementation to succeed in the long run, clear and consistent business processes should be implemented to complement your territory setup.

Leverage Territory Hierarchies and Inheritance

Territory hierarchies do more than organize your territories. They also organize your transactional qualifier rules, critical to improving the ease of maintenance. Child territories always inherit transactional qualifier rules.

If you are building a set of 100 representative territories exclusive to the US, it is a best practice to introduce a hierarchy layer representing countries which should include the transactional qualifier rule "Country = United States". In this manner, all the 100 child territories will inherit its transaction qualifier rules. Instead of maintaining the rule in 100 territories it can be maintained in one parent territory.

These parent territories can also be assigned resources and act as "Catch All" territories in case the customer, lead or opportunity did not match one of the child territories. We have two catch alls in our business world example: one for Canada and the other for the US. Assigning a resource to "Catch All" territories will route customers, leads, and opportunities to the designated resource for resolution. Catch alls are typically assigned to territory administrators.

Leverage Territory Ranking and Number of Winners

The number of winners refers to the number of winning territories allowed. The number of winners can be defined for territories up to five levels down the hierarchy for the Sales and TeleSales usage. It can only be defined at the top level for other usages. Territory rankings work in conjunction with the number of winners = "w" by selecting the top ranked "w" territories within a level of the hierarchy. Territories lower in a hierarchy

have an inherent higher ranking compared to territories higher in the hierarchy. When a winning territory is found, all of the resources assigned to it are assigned to the business object.

A good example of this is the difference between named account territories and geographic territories. You don't want to have to maintain the exclusion of named accounts from the geographic territories explicitly. Rather, you would set the number of winners to one and use the customer name range qualifier in the named account territories and rank these higher than the geographic territories utilizing postal code qualifier. The territory engine finds that both territories match but the number of winners and rankings dictate that the higher ranked named account territory wins.

Choosing Appropriate Qualifiers

The qualifiers used in defining named account territories are Customer Name Range, DUNS Number, and Customer Name. These qualifiers identify TCA (Trading Community Architecture) organizations. The Customer Name qualifier identifies organizations by their literal name, while the Customer Name Range qualifier identifies organizations through ranges of names or even partial name matches. The DUNS Number qualifier identifies organizations through DUNS number matches. Unless you have strict data quality management policies in place and there is only one occurrence of each customer, we recommend that you use the Customer Name Range qualifier in combination with a geographic qualifier for named accounts.

Be careful not to confuse SIC code, geographic, etc. territories with named accounts. Many organizations will attempt to implement geographic or SIC code based territories as named accounts because they say they have always done it this way. Questions to ask:

- How many named accounts does the organization have? If sales management claims that named accounts make up more than 20% of all TCA organizations, then they are likely to have incorrectly implemented named accounts. For example, a Telecom territory is composed of 50 SIC codes. Implementing a Telecom territory as 20,000 named accounts would require a minimum of 20,000 CUSTOMER NAME RANGE qualifier rules. Clearly, it would be better implemented as a territory with 50 SIC CODE qualifier rules. There is a diagnostic test within the Oracle Diagnostic Framework for this.
- How many named accounts does a typical resource have? If sales management claims their reps have any more than a hundred named accounts, they are likely to have incorrectly implemented a simple territory as named accounts. Investigate how the business derived the set of named accounts. Typically, reps do not have the bandwidth to manage more than 100 named accounts and give them the proper attention associated to critical customers.
- Does your business qualifier fluctuate in the context of the business object you are assigning? Does it segment customers periodically based on a dynamic business qualifier? It is important to examine the fluctuation of the dynamic qualifier in the context of the business object you are assigning. For instance in the credit card industry, customers are segmented by their total A/R balance every quarter into three territories (e.g., <\$250k, \$250k-\$500k, >\$500k) and customers maintain their segmentation even though their balances change.

In these cases, we recommend that you designate account classifications based on the dynamic qualifier periodically and then use the account classification qualifier in Territory Manager.

Using named accounts in lieu of geographic territories is an ineffective way to distribute a representative's territory. It is ineffective in terms of application performance, scalability, and ease of maintenance. 20,000 customers are segmented by the number of employees quarterly into three territories (e.g., <100, 100-1000, >1000 employees). Instead of maintaining three qualifier rules based on the number of employees qualifier, you are maintaining a minimum of 20,000 customer name range qualifier rules. Territory assignment performance is directly correlated to the number of qualifier rules. Territory assignment will be slower with 20,000 qualifier rules than with three.

Qualifier Rules

Best practices around qualifier rules are the simplest to follow because they are very concrete. Qualifier rules are converted to SQL and are subject to the same performance constraints. The use of the % wildcard as the first character of the qualifier value prevents the use of indexes.

Migrating Territories

For how long are your territories active? Your sales organization may migrate to new territories yearly or quarterly and you want to use the existing territory hierarchy as a starting baseline. By following best practices, it will be easier to migrate territories to the next period. The trick is to define a territory start date at the top level territory, since all those below it will be gated by the start date property. Copy the top-level territory, which will automatically copy all the child territories as well. Rename the top-level territory and give it a new start date. Don't forget to go back to the old territory hierarchy and end date the top-level territory.

Sales Qualifiers

The following table lists the transaction qualifiers used by Oracle Sales products and their respective uses. The Account transaction type is also used by Oracle Incentive Compensation.

Sales Qualifiers

| Transaction Type | Territory Qualifier | Sales Online/TeleSales Attribute |
|-------------------------|----------------------------|---|
| Account | Account Classification | Interest of "party site" |
| Account | Account Code | Customer Name + Address (party site ID) |
| Account | Account Hierarchy | "Subsidiary Of" a particular organization |
| Account | Area Code | Area Code |
| Account | City | City |
| Account | Country | Country |

| Transaction Type | Territory Qualifier | Sales Online/TeleSales Attribute |
|-------------------------|---|---|
| Account | County | County |
| Account | Customer Category | Customer Category |
| Account | Customer Name | Customer Name |
| Account | Customer Name Range | Customer Name |
| Account | DUNS Number (Not available prior to Sales Release 11.5.9) | Note: Do not use DUNS number if your implementation has a Sales baseline prior to release 11.5.8. |
| Account | Number of Employees | Total Employees |
| Account | Postal Code | Postal Code |
| Account | Product Hierarchy | |
| Account | Province | Province |
| Account | Registry ID (Not available prior to Sales Release 11.5.9) | Party Number or Registry ID |
| Account | SIC Code | SIC Code |
| Account | Sales Partner Of | Partner Of |
| Account | State | State |
| Lead | Budget Amount | Budget |
| Lead | Lead Product Category (Not available prior to Sales Release 11.5.10) | Product Category |
| Lead | Lead Inventory Item | Inventory Item |
| Lead | Lead Promotion Identifier | Source Name |
| Lead | Purchase Amount | Amount |
| Lead | Sales Channel (Not available prior to Sales Release 11.5.10) | |
| Opportunity | Opportunity Channel | Sales Channel |
| Opportunity | Opportunity Classification | Classification |
| Opportunity | Opportunity Product Category (Not available prior to Sales Release 11.5.10) | Product Category |
| Opportunity | Opportunity Inventory Item | Inventory Item |

| Transaction Type | Territory Qualifier | Sales Online/TeleSales Attribute |
|-------------------------|----------------------------|---|
| Opportunity | Opportunity Status | Status |
| Opportunity | Total Amount | Total |
| Quoting | Product Category | |

Service Qualifiers

The following table lists transaction qualifiers used by the Oracle Service products and their respective uses.

Service Qualifiers

| Transaction Type | Territory Qualifier | Mapping to Oracle Service |
|---------------------------|----------------------------|--|
| Contact Preference | Service Request | Communication Preference on SR Form. Derived from ar_lookups |
| Customer Site | Service Request | Not currently used by SR |
| Group Owner | Service Request | Group Field on SR Form. Derived from JTF Tables. |
| Inventory Item | Service Request | Item field in SR form. Derived from Inventory. |
| Platform | Service Request | Platform field in Product Coverage tab of SR form. Derived from Inventory. |
| Primary Platform | Service Request | Null |
| Problem Code | Service Request | Problem Code field in Workbench Tab. Derived from CS_LOOKUPS |
| Product | Service Request | Item field in SR form. Derived from Inventory. |
| Product Category/ Product | Service Request | Category field in SR header. Derived from Inventory. |
| Request Creation Channel | Service Request | Channel field on SR Form. Derived from CS_LOOKUPS |
| Request Severity | Service Request | Severity field in SR form. |
| Request Status | Service Request | Status field in SR form. |
| Request Type | Service Request | Type field in SR form. |

| Transaction Type | Territory Qualifier | Mapping to Oracle Service |
|---------------------------|----------------------------|--|
| Request Urgency | Service Request | Urgency field on SR Form. |
| Service Contract Coverage | Service Request | Coverage Field on SR Form. Returned by Contracts API. |
| Service Item | Service Request | Not currently used |
| Service Request Language | Service Request | Language Field on SR Form. |
| Support Site | Service Request | Support Site on SR Form. Derived from JTF Tables. |
| VIP Customers | Service Request | Not currently used by SR |
| Account Code | Account | Customer Name + Address of customer on a SR or Task |
| Area Code | Account | Same from address of customer on a SR or Task |
| City | Account | Same from address of customer on a SR or Task |
| Country | Account | Same from address of customer on a SR or Task |
| County | Account | Same from address of customer on a SR or Task |
| Customer Name | Account | Organization |
| Customer Name Range | Account | Organization |
| Number of Employees | Account | Total Employees of customer |
| Postal Code | Account | Same from address of customer on a SR or Task |
| Province | Account | Same from address of customer on a SR or Task |
| State | Account | Same from address of customer on a SR or Task |
| Task Priority | Task | Task Priority of task |
| Task Status | Task | Task Status of task |
| Task Type | Task | Task Type of task |

Oracle Partner Management Qualifiers

The following table lists the transaction type and qualifiers for the Oracle Partner Management usage.

Partner Management Qualifiers

| Transaction Type | Territory Qualifier |
|-------------------------|----------------------------|
| Partner | Area Code |
| Partner | City |
| Partner | Company Annual Revenue |
| Partner | Country |
| Partner | County |
| Partner | Customer Category |
| Partner | Number of Employees |
| Partner | Partner Level |
| Partner | Partner Name |
| Partner | Partner Name Range |
| Partner | Partner Type |
| Partner | Postal Code |
| Partner | Province |
| Partner | State |

Setting Up Territories

This chapter covers the following topics:

- Overview of Setting Up Territories
- Qualifiers
- Territory Hierarchies
- Winning Territory Rules
- Number of Winners for Sales and TeleSales Usage
- If You Have Value Added Tax (VAT)
- Enabling Existing Qualifiers
- Creating Individual Territories
- Entering Transaction Qualifiers
- Entering Resource Qualifiers
- Specifying Resources for a Territory
- Adding Subterritories
- Running Concurrent Programs
- Setting Up Territory Assignment Program

Overview of Setting Up Territories

A territory defines who owns what. *Who* refers to the resources assigned to the territory and *what* refers to the business object to which they are assigned. Resources can be individual resources or group resources. Examples of business objects are leads, service requests, customers, and delinquencies.

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:

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. |

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.

Sample List of Seeded Transaction Qualifiers

Territory Manager includes seeded qualifiers for the following modules:

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

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.

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.

Using 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.

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.

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.

Winning Territory 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.

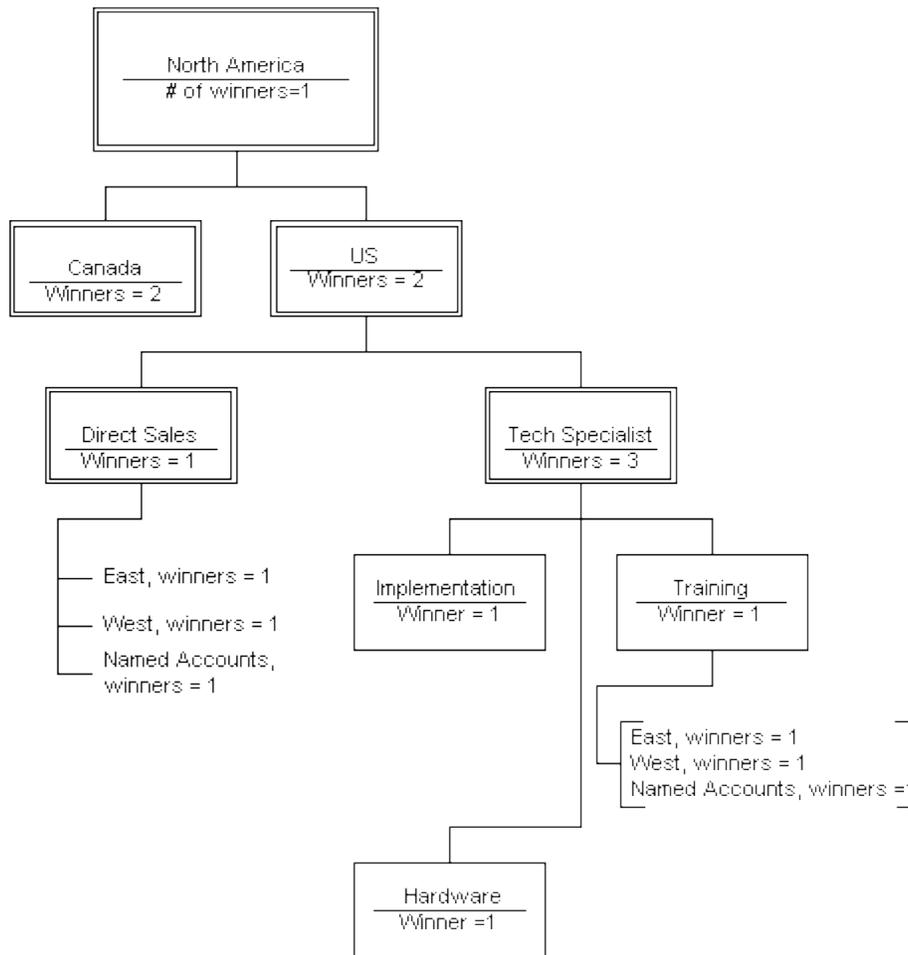
Reason: The territory with rank 2 wins over the territories with rank 3 and 4.

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.

If You Have Value Added Tax (VAT)

If you have VAT and want to use geographic qualifiers for the Sales usage, then you need to set up the geographies so that they appear in the lists of values (LOVs) for territory qualifiers in the Forms Territory Details window.

As the Sales Administrator, navigate to Sales Setup > Lookup Codes and create the lookup types and values for any of the following lookup types you may need:

- TAP_CITY: to add cities

- TAP_STATE: to add states
- TAP_COUNTY: to add counties
- TAP_PROVINCE: to add provinces

Enabling Existing Qualifiers

Oracle CRM Application Foundation has seeded qualifiers for the following usages:

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

Before using a transaction qualifier, you need to enable it.

The application provides a large number of seeded qualifiers for Collections, Defect Management, Sales and TeleSales, Partner Management, Service, Service Contracts, and Trade Management. In general, qualifiers are used by the Assignment Manager or Scheduler to assign qualified resources for transactions. Unlike the transaction qualifiers classified by the territory usage, resource qualifiers are shared throughout the application regardless of territory usage except for Service Contracts and Collections. Therefore, you do not need to enable them.

Perform the following steps to enable the existing transaction qualifiers.

Responsibility CRM Administrator

Navigation

Territory Manager > Territory Administration to open the Navigator window

Steps:

1. Select **Administration** from the drop down menu and choose **Setup Qualifiers**.
The Setup Qualifier window opens.
2. Select the Usage drop-down list.
The Select Usage window opens.
3. Highlight your selection and click **OK**.
The Setup Qualifier window opens and the Usage field is populated with your selection.
4. Select **Find**.
You can also select an appropriate qualifier status (Enabled, Disabled, or All) before finding them. Note that all resource qualifiers are not listed here.
5. Select (or deselect) the targeted qualifiers and select **Update Qualifiers**.

Restrictions

For service territory even if Account transaction qualifiers are enabled, you won't be able to see Account from the Transaction Type LOV. The Account transaction type is used as subsets of Task or Service Request (usage). This forces you to tie account qualifiers to either Task or Service Request.

The *Service Request and Task* transaction type means tasks are created through a service request. If it is a stand-alone task, use the *Task* transaction type instead.

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.

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

Prerequisites

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

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.

Important: 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.

Restrictions

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 CRM Application Foundation 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.

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.

Navigation

Territory Manager > Territory Administration > Administration > Define Territory

Double-click the territory in the Tree Navigator

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

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.

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.

Note: 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.

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:
 1. Select the people you want to assign to this territory by checking the **Assign** check box next to their names.
 2. 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.

Example

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.

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 Concurrent Programs

It is important that the territory administrator runs the following concurrent programs regularly.

After the concurrent programs run successfully, the Oracle CRM Application Foundation module is automatically updated to reflect the changes made to your territories.

The following table describes the function of the seeded concurrent programs.

Seeded Concurrent Programs

| Name | Function | Frequency |
|---|--|--|
| Generate Territory Details | This request set runs <i>Generate Self-Service Territories</i> and <i>Generate Territory Packages</i> . | As often as you need to activate territory changes, for example, nightly. Use this request set if you use self-service named account or geographic territories. |
| Generate Self-Service Territories | Generates the physical territories for named account and geographic self-service territories. When it successfully completes, you must also run <i>Generate Territory Packages</i> . | As often as you need to activate territory changes, for example, nightly. |
| Generate Territory Packages | <ul style="list-style-type: none">To build the territory assignment rules. Otherwise, your territories will not reflect the actual changes and will not work correctly when Assignment Manager assigns resources.Builds the API that returns the winning territories and resources attached to the winning territories, which are defined in territory setup. | As often as you need to activate territory changes, for example, nightly. If you manually define territories using the Forms Navigator, then you run only this concurrent program. |
| Named Account Territory Post Processing | <ul style="list-style-type: none">Kicks off named account catchall workflow processing.Refreshes territory administration portals for Sales.Refreshes the named account and geography distribution information for the Sales User responsibility. | As often as you want the numbers in the catch all portlet updated and workflows run. |
| Calculate Territory Alignment | Calculates information such as DNB annual revenue for named accounts for the time period specified in the system profile options <i>Territory Alignment Metric Calculation From Date</i> and <i>Territory Alignment Metric Calculation To Date</i> . | Whenever DNB information changes, the time period changes, or named accounts are added. |

Responsibility

CRM Administrator

Navigation

Requests > Run to open the Submit a New Request window

Steps:

1. Select **Single Request** or **Request Set**.
2. Click **OK**.
3. In the Name LOV, select the name of the concurrent program or request set.
4. In the Parameters pop-up window of the Submit Request, enter your parameters.
5. Click **OK**.
6. Click **Schedule** in the Submit Request window to set appropriate information to run concurrent programs periodically.
7. Click **Submit**.

Restrictions

Generate Self-Service Territories uses the following parameters:

- Debug Flag: Yes to write debug messages
- SQL Trace: Yes to generate SQL trace
- Number of Workers: Set the number of parallel workers
- Run Mode: Set to **Total Refresh** the first time you run the concurrent program. Subsequently, set to **Incremental Refresh** to process only the changes in named account and geographic territories, which saves processing time.

The parameter for *Generate Territory Packages* is the usage. Select the correct usage from the LOV, such as *Oracle Sales and TeleSales* or *Oracle Service*.

Named Account Territory Post Processing uses two parameters:

- Run the Workflow: choose either yes or no
- Name of the Bin: Select the bin to be calculated. Your options are:
 - All
 - Catchall Bin (Catchall portlet)
 - KPI Bin (Key Performance Indicator portlet)
 - RM Bin (Regional Manager Bin) for the named account and geography distribution bin
 - None (Select to run workflow only)

Setting Up Territory Assignment Program

If you are implementing sales territories, then you need to set up the Territory Assignment Program per the steps provided in either the *Oracle Field Sales Implementation Guide* and the *Oracle TeleSales Implementation Guide*.

Creating Self Service Named Account Territories

This chapter covers the following topics:

- Overview of Creating Named Account Territories
- Named Account Territory Process
- Migrating from Forms to Named Account Self Service
- Enabling Qualifiers
- Setting Up to Use Dun & Bradstreet Data
- Setting Up Territory Alignment
- Proxy User
- Setting Up Named Account or Geography Export
- Creating a Parent Territory
- Creating Named Account Territory Groups
- Promoting Organizations to Named Accounts Using Spreadsheet
- Defining Named Account Assignment Rules
- Using the Territory Alignment
- Assigning the Sales Team to Named Accounts
- Concurrent Programs
- Usage Implementation

Overview of Creating Named Account Territories

Named accounts are centrally defined, associated to sales groups, and distributed from the top down to individual salespersons. Named account territories apply to the Sales and TeleSales usage only.

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 implementer or administrator creates named account territory groups by associating organizations to the territory group. The act of associating organizations to a territory

group elevates an organization to a named account. An account that falls within the definition, and any leads or opportunities for accounts that match the definition, all belong to the defined named account.

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

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

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

Components of Self-Service Named Accounts

There are three components of self-service named accounts:

- **Named Accounts:** Those customers that have been identified by a division as important or critical enough to have their own account teams.
- **Territory Groups:** Each division has its own set of named accounts. For instance, each division or line of business will have its own sales organization, its own set of named accounts, and its own business processes. We loosely associate lines of businesses or selling organizations to "territory groups." Each territory group will be associated to a particular sales force and have its own set of named accounts with its own business policies and processes. The territory group is assigned a parent territory already set up in the Forms application. When *Generate Territory Packages* is run for Sales and TeleSales, the territory group becomes a single level territory hierarchy inserted into an existing territory hierarchy.
- **Named Account Matching Rules:** Named accounts can be matched to TCA organizations by one of the following:
 - Registry ID
 - DUNS number
 - Customer name range and postal code
 - DUNS number, customer name range, and postal code

The matching rule associated to each territory group determines the qualifiers that need to be enabled.

Ongoing Maintenance

New hires, fires, and to be hireds require sales managers to update named account assignments throughout the selling year. Any change to named account assignments can be made by sales managers at any time.

Monthly Dun & Bradstreet uploads contain mergers and divestitures. Sales organizations will either maintain their sales team assignments even through corporate changes

(requiring no named account territory maintenance), or change sales team assignments to reflect the divestiture (requiring new sales team assignments).

Territory administrators diagnose why transactions are falling into their named account Catch Alls and fix the problem. Typical problems are:

- An incorrect postal/zip code on a correct business name. The fix is to correct the address.
- A missing subsidiary of a named account. The fix is to add a named account to a territory group and have it assigned or refine a named account definition to include the new postal code.

Oracle Workflow can be used to automate the exception handling of both these problems.

Occasionally, new named accounts are added or moved between divisions. These changes are managed by territory administrators following each business's checks and balances. Removing named accounts from a territory group immediately unassigns the sales teams.

If Territory Alignment is used, then 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, and when new named accounts are created.

Annual Maintenance

Before the start of the new sales year, existing territory groups can easily be copied and changes made for the new selling year by territory administrators.

Once active, named accounts can be distributed down the sales hierarchy in an efficient and effective manner, making it possible to reduce territory set ups and implementations to a minimum.

The bulk of named account definitions are created by territory administrators when you first migrate to the new named account territories. After that, only new named accounts require named account definitions. It is unlikely that your list of key customers is going to change drastically from year to year, which again minimizes your territory setup times.

Alignment

Sales managers create alignments in an iterative manner until their alignment goals are met. They export alignments to spreadsheet to create what-if territories for the alignment and then upload the updated information. They can then compare two alignments using analytic data until they have the alignment they want to use. When they activate an alignment it becomes the current live territory assignment for their named accounts.

Territory Autogeneration Mechanics

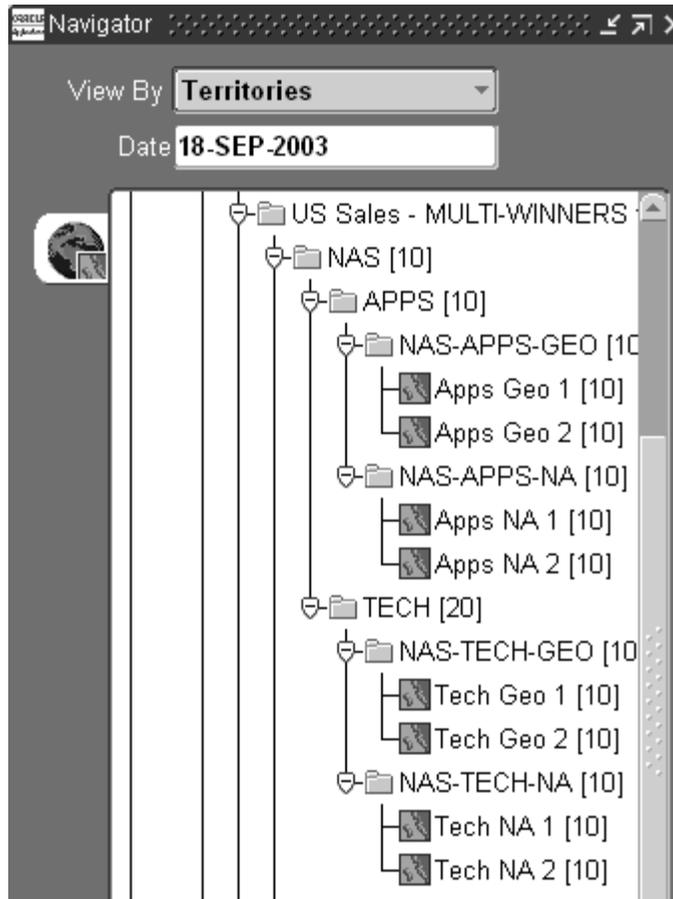
Territories are composed of qualifier rules and resources. Qualifier rules are derived from centralized named account definitions. Resource assignments are derived from the self-service assignments made by sales managers. Taking information from two user bases (for example, territory administrators for centralized named account definitions and sales managers for resource assignments), Oracle Territory Manager automatically generates hierarchies of named account territories that are configured to hang off of an existing territory hierarchy.

Generated named account territories have the following structure:

```
<parent territory>  
<territory group>  
<named account>  
<role + named account>  
<territory group catchall>
```

Administrators can review the read-only generated territories via the Territory Navigator in Forms. Existing territories managed through the Territory Navigator interface will continue to be supported and require no changes to work with the new self-service named account and geography management solution.

The following screenshot of the Territory Navigator displays the resulting generated named account and geographic territories within the territory hierarchy.



Named Account Territory Process

The process for setting up named account territories includes the following steps:

1. At the beginning of a sales planning cycle, upper management assigns a set of named accounts to a sales VP of a division.
2. Sales operations is responsible for creating a "territory group" modeling the named account process of a division.
3. Select a matching rule, the method to map TCA organizations to named accounts.

4. Transactions falling to Catch Alls can be assigned to territory administrators or IT can develop workflows to manage exception handling of customers, leads, and opportunities.
5. Sales managers under the VP then distribute all named accounts top down until every named account is assigned to a lowest level salesperson.
6. At the same time, territory administrators are responsible for creating a named account definition to capture other customers, leads, and opportunities matching to the same named account. Named account definitions or territory rules utilize the method or matching rule associated to a territory group. The matching rule selected determines the qualifiers to be used.

In the case of the customer name range and postal code matching rule, named account definitions or territory rules are defaulted to CUSTOMER NAME RANGE = business name of the account and POSTAL CODE = postal code of the account. Territory administrators can also add alias CUSTOMER NAME RANGES and other postal codes or postal code ranges. It is important to note that these named account definitions can be continually refined as they are set up once and cross selling years.

7. Territory administrations and sales operations can monitor the completion percentages of the self-service named account process.
8. When this process is complete enough, territory hierarchies are automatically generated and enabled for territory groups.
9. These read-only, generated territories can be reviewed by territory administrators from the Forms interface and are used just like any other manually created territories for real-time and batch territory assignment.
10. Territory administrators diagnose and fix transactions falling to their named account Catch Alls.

Migrating from Forms to Named Account Self Service

Perform the following steps to migrate from territories created using the Forms user interface to the self-service named account territories.

1. Territory administrators should ensure the qualifiers of the matching rules, for example CUSTOMER NAME RANGE and POSTAL CODE, are enabled. Other qualifiers you wish to use in the parent territory, like COUNTRY, should also be enabled.
2. Territory administrators need to create a parent territory in the Forms interface that is a child of the Oracle Sales and TeleSales usage folder. This will be the territory under which a generated territory group hierarchy will be inserted. It should address effective dates, the number of winners and any qualifier rules that its generated child territories need to inherit; for example, COUNTRY = 'United States'.
3. Sales operations compiles a list of named accounts for each division, and determines necessary exception handling procedures.
4. Determine how existing or new sales roles will be used to drive account, lead, and opportunity access. Lead and opportunity access can further be refined by product category thereby giving access to leads and opportunities if a representative's product specialization exists.

5. Territory groups are created based on exception handling processes and division lines, and named accounts and sales division vice presidents are associated.
6. Assign territory administrators to territory group Catch Alls for customers, leads, or opportunities that match on CUSTOMER NAME RANGE qualifier rules only. Otherwise, have IT create workflows encompassing your division's exception handling processes and procedures. DUNS number or Registry ID territory groups do not have catch alls as these are not necessary.
7. (This step does not apply if you choose the DUNS number or Registry ID matching rule for the territory group.) When you create new named account territories, administrators will need to create named account definitions for each new named account. Named account definitions or territory rules must be created to map customers, leads, or opportunities to named accounts. Default mappings are created based on CUSTOMER NAME RANGE = business name of account and POSTAL CODE = postal/zip code of named account. Alias business names and postal codes can be added to named account definitions. For example, Hewlett-Packard is commonly known as HP or Compaq.
8. (This step does not apply if you choose the DUNS number or Registry ID matching rule for the territory group.) Before each named account mapping is complete, territory administrators should check that the definition they are creating does not conflict with any other named account definitions. This ensures that a customer, lead, or opportunity will only fall into one named account territory. Utilities are provided to identify conflicting named accounts and their territory rules at a click of a button so administrators can tighten or loosen their existing territory rules as necessary. After all conflicts are eliminated the administrator marks the named account as mapped.
9. To access the self-service sales management side of Oracle Territory Manager, sales managers, and representatives are given the HTML Sales Territory User responsibility.
10. Named accounts are distributed down the sales hierarchy from the sales division vice president one level at a time until all named accounts are assigned to lowest level salespersons.
11. Portals provide territory administrators with the ability to track the progress of territory assignment down to lowest level reps and named account mapping. When enough progress is achieved, a territory administrator generates named account territories by submitting a concurrent program.
12. Submit a concurrent program to run batch mode Territory Assignment. This will reassign sales teams to all customers, leads, and opportunities based on the latest territory definitions generated.
13. Validate the new named account territories through user acceptance testing.

As part of our mapping process, named account definitions or territory rules are defaulted to CUSTOMER NAME RANGE = business name of the account and POSTAL CODE = postal code of the account. Territory administrators can also add alias CUSTOMER NAME RANGES and other postal codes or postal code ranges.

Enabling Qualifiers

In order to implement named account territories you must minimally enable qualifiers of matching rules, for example CUSTOMER NAME RANGE, DUNS NUMBER, REGISTRY ID, and POSTAL CODE. See *Enabling Existing Qualifiers*, page 5- 7 for the procedure.

Setting Up to Use Dun & Bradstreet Data

If you want to use Dun & Bradstreet data for your named accounts, or use the DUNS number qualifier, then you need to perform this procedure.

Login

Log in to the Personal Home Page.

Responsibility

Trading Community Manager

Navigation

Content Access and Integration > Setup > Set Up Tab > Other Entities > Set Up Data Sources

Prerequisites

- Use the System Administrator responsibility to assign a user the Trading Community Manager responsibility.
 - Purchase Dun & Bradstreet information. See the *Oracle Trading Community Architecture Third Party Data Integration User Guide* for more information. Do not import the data into TCA until after performing this procedure.
1. In the Set Up Data Sources page, select both Addresses and Relationship.
 2. In the Set Up Data Sources page, select both Addresses and Relationship.
 3. Click **Update as a Group**.
The Select Data Sources for Selected Entities page appears.
 4. Move the data source Dun & Bradstreet from the Available Data Sources box to the Selected Data Sources box.
 5. Click **Apply**.

Setting Up Territory Alignment

The metrics DNB Number of Employees and DNB Annual Revenue, used for comparing alignments, depend upon information provided by Trading Community Architecture.

Login

Log in to the Personal Home Page.

Responsibility

Trading Community Manager

Navigation

Prerequisites

- Use the System Administrator responsibility to assign a user the Trading Community Manager responsibility.
- Purchase Dun & Bradstreet information. See the *Oracle Trading Community Architecture Third Party Data Integration User Guide* for more information. Do not import the data into TCA until after performing this procedure.

Steps:

1. In the Organization Profile Entity region, click **View Attributes**.
The View Attributes for Organization Profile Entity page displays a list of attributes.
2. Select the attribute Employees at Primary Address.
3. Click **Update Individually**.
The Select and Rank Data Sources for Attributes: Employees at Primary Address page appears.
4. Move the data source Dun & Bradstreet from the Select Data Sources box to the Rank Data Sources box and move it to the top of the box ahead of User Entered.
5. Click **Finish**.
6. Navigate to the Other Entities > Set Up Data Sources page.
7. Select Financial Report.
8. Click **Update as a Group**.
The Select Data Sources for Selected Entities page appears.
9. Move the data source Dun & Bradstreet from the Available Data Sources box to the Selected Data Sources box.
10. Click **Apply**.
11. Using the System Administrator responsibility, set the following two profile options to set the date range for metric calculations:
 - Territory Alignment Metric Calculation From Date
 - Territory Alignment Metric Calculation To Date
12. Using the CRM Administrator responsibility, run the concurrent program *Calculate Territory Alignment*.

This concurrent program 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; and when new named accounts are created.

Metric information is now calculated and available to use for territory alignments.

Proxy User

A user who is a member of a sales group and who is assigned the proxy user role can assign the named accounts or geographic territories owned by the manager of that sales

group to any member of the sales group hierarchy that reports up to that manager. This role is typically assigned to a sales administrator or sales operations who can then assign accounts in the sales manager's organization.

Using Resource Manager, create a special role for this function of the type Sales and select the Administrator or Member flag.

Then assign the newly created role to a member of the sales group to be the proxy user.

Next, enter the role in the system profile option *Self Service Named Account Proxy User Role*.

When the proxy user logs in, he will see the same list of named accounts and geographic territories as the manager of the sales group that he is the proxy user for.

Setting Up Named Account or Geography Export

Self-service geographic territory creation requires the ability to export to and upload from spreadsheet. These features are optional for named accounts. To use the export to Microsoft Excel and upload from spreadsheet features you need to do the following:

1. Install the Oracle Web Applications Desktop Integrator Patch Set B (2677750).
2. Enable *Initialize and script Active X controls not marked as safe* in your browser.

Creating a Parent Territory

A parent territory must be created in Forms before you can implement named account territories. The parent territory must be any one of the top 5 levels of the territory hierarchy. See *Creating Individual Territories*, page 5- 8 for the procedure for creating the parent territory.

Creating Named Account Territory Groups

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

You use the same pages to update information about the territory group.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales Administrator

Navigation

Territory Manager > Territories > 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 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 taken 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.
 1. Use the LOV to select a role from CRM Resources.
 2. Select the access types for the role. Choices are account, lead, and opportunity.
 3. 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.
 4. If you are specifying product categories, then use the LOV to select a product category.
 5. If you want to select additional product categories, then click **Add Another Row** and repeat step d.
 6. When you have completed adding product categories to the role click **Apply**.
The Define Role Access page appears.
 7. If you want to add additional roles, then click **Add Another Row** and repeat from step a.
 8. 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.

1. 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.
 2. 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.
 3. 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.
 4. 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.
 5. 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, page 6-12.
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.

Restrictions

The concurrent program request set *Generate Territory Details* must be run for your territory changes to be effective. You can then view the territories in Forms. The ranking you see in Forms is the rank you assigned plus 20.

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.

Prerequisites

- 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.

Restrictions

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.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Global Sales Administrator

Navigation

Dashboard > Named Accounts

Prerequisites

- At least one territory group exists with a named account.

Steps:

1. Perform either a simple search or an advanced search.
A list of 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:
 1. Click **Select All** and click **Show Conflicts**.
The Map page lists conflicting named accounts and their overlapping qualifier rules.
 2. If conflicts appear, then tighten or loosen the named account qualifier rules to avoid conflicts.
 3. 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.

Restrictions

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.

Using the 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.

Alignments can optionally be used at this point of the implementation for creating named account territories. Use the procedures in the *Oracle Territory Manager User Guide* to do the following:

1. Create a named account territory alignment
2. Assign named accounts for an alignment
3. Compare alignments
4. Activate the preferred territory alignment to create named account territories

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. You can activate an alignment to assign the sales team to named accounts as an alternative to this procedure. Managers can also export named accounts to spreadsheet to assign them. See the *Oracle Territory Manager User Guide* for information about both alternatives. You can also assign the sales team at the time you promote organizations to named accounts. (See *Promoting Organizations to Named Accounts Using Spreadsheet*, page 6-12 for the procedure.)

Prerequisites

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

Steps:

1. Select the Territories tab.
2. Select the Named Accounts subtab.
3. Perform either a simple search or an advanced search.
A list of named accounts appears.
4. In the Select column, select one or many named accounts to update.
5. Click **Update Sales Team**.
The Update Sales Team page lists the selected accounts.
6. If you want to add a salesperson to the sales team, then perform the following steps in the Add Salesperson section:

1. Use the LOV to select the salesperson, sales group, and sales role. 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.
2. If you want to add another salesperson, then click **Add Another Row** and repeat from step a.
7. If you want to remove a salesperson from the sales team, then perform the following steps in the Remove Salesperson section:
 1. 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.
 2. If you want to remove another salesperson, then click **Add Another Row** and repeat from step a.
8. Click **Apply**.

Your changes are saved.

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.

Concurrent Programs

It is important to run concurrent programs regularly to update territory information. See *Running Concurrent Programs*, page 5-13.

Usage Implementation

Additional implementation steps relate to the usage for Oracle Territory Manager. For example, if your usage is sales, see the *Oracle Field Sales Implementation Guide*.

Creating Geographic Territories

This chapter covers the following topics:

- Overview of Geographic Territories
- Geographic Territory Process
- Migrating from Forms to Self Service
- Loading Postal Codes
- Enabling Qualifiers
- Setting Up Export
- Creating a Parent Territory
- Creating Geography Territory Groups
- Creating a Geographic Territory
- Concurrent Programs

Overview of Geographic Territories

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.

Geographic Territory Process

The process for setting up geographic territories includes the following steps:

1. At the beginning of a sales planning cycle, upper management assigns a large geographic area to a sales VP of a division.
2. Sales operations is responsible for creating top level geographic territories under an existing parent territory. The creation of the territory includes assigning the VP as the resource of the territory.
3. Transactions falling to Catch Alls can be assigned to territory administrators or IT can develop workflows to manage exception handling of customers, leads, and opportunities.
4. The VPs divide their territories and create geographic subterritories they assign to their sales managers.
5. Sales managers under the VP are familiar with their geographic areas and are therefore the most qualified to determine how to divide their areas among their salespeople. They create subterritories that can be as small as one postal code and assign salespeople to the newly created subterritories.

Migrating from Forms to Self Service

Perform the following steps to migrate from territories created using the Forms user interface to the self-service geographic territories.

1. Territory administrators should ensure that minimally the POSTAL CODE qualifier is enabled. Other qualifiers you want to use in the parent territory, like COUNTRY, should also be enabled.
2. Territory administrators need to create a parent territory in the Forms interface that is a child of the Oracle Sales and TeleSales usage folder. This will be the territory under which the generated geographic territories will be inserted. It should address effective dates, the number of winners, and any qualifier rules that its generated child territories need to inherit, for example, COUNTRY = 'United States'.
3. Sales operations compiles a list of existing geographic territories for each division, and determines necessary exception handling procedures.
4. Determine how existing or new sales roles will be used to drive account, lead, and opportunity access. Lead and opportunity access can further be refined by product category thereby giving access to leads and opportunities if a representative's product specialization exists.
5. To access the self-service sales management side of Territory Manager, sales managers and reps are given the Territory HTML Sales User responsibility.
6. Geographic territories are created and assigned down the sales hierarchy from the sales division vice president one level at a time until all postal codes are assigned to lowest level salespersons.
7. Submit a concurrent program to run batch mode Territory Assignment. This will reassign sales teams to all customers, leads and opportunities based on the latest territory definitions generated.
8. Validate the new geographic territories through user acceptance testing.

Loading Postal Codes

You need to load geographic data into the table that is used by self-service geography. This section covers the public APIs you use to do so, and provides some sample SQL code. You must purchase your geography data, for example from the United States Postal Service. It needs to contain city, state or province, country, and postal code.

Table

The name of the table that contains the geographic data is JTF_TTY_GEOGRAPHIES.

Supported Geography Types

The types of geography supported in Oracle Territory Manager are:

- Country (COUNTRY)
- State (STATE)
- City (CITY)
- Postal Code (POSTAL_CODE)

APIs

The PL/SQL package JTF_TTY_GEOSOURCE_PUB contains three APIs:

- CREATE_GEO
- DELETE_GEO
- UPDATE_GEO

CREATE_GEO API

This API creates a geography. This is the API you will use to initially populate geographic data into the JTF_TTY_GEOGRAPHIES table.

Procedure Specification:

```
Create_geo(  
  p_geo_type IN VARCHAR2,  
  p_geo_name IN VARCHAR2,  
  p_geo_code IN VARCHAR2,  
  p_country_code IN VARCHAR2,  
  p_state_code IN VARCHAR2 default null,  
  p_province_code IN VARCHAR2 default null,  
  p_county_code IN VARCHAR2 default null,  
  p_city_code IN VARCHAR2 default null,  
  p_postal_code IN VARCHAR2 default null,  
  x_return_status IN OUT NOCOPY VARCHAR2,  
  x_error_msg IN OUT NOCOPY VARCHAR2)
```

Example

```
DECLARE  
  
  err_status VARCHAR2(80);  
  err_msg VARCHAR2(255);  
  
BEGIN
```

```

-- to populate country with 'US'

JTF_TTY_GEOSOURCE_PUB.create_geo(p_geo_type => 'COUNTRY',
    p_geo_name => 'United States',
    p_geo_code => 'US',
    p_country_code => 'US',
    p_state_code => null,
    p_province_code => null,
    p_county_code => null,
    p_city_code => null,
    p_postal_code => null,
    x_return_status => err_status,
    x_error_msg => err_msg);

-- to populate state with 'California'

JTF_TTY_GEOSOURCE_PUB.create_geo(p_geo_type => 'STATE',
    p_geo_name => 'California',
    p_geo_code => 'CA',
    p_country_code => 'US',
    p_state_code => 'CA',
    p_province_code => null,
    p_county_code => null,
    p_city_code => null,
    p_postal_code => null,
    x_return_status => err_status,
    x_error_msg => err_msg);

-- to populate city with 'San Francisco'

JTF_TTY_GEOSOURCE_PUB.create_geo(p_geo_type => 'CITY',
    p_geo_name => 'San Francisco',
    p_geo_code => 'SAN_FRANCISCO',
    p_country_code => 'US',
    p_state_code => 'CA',
    p_province_code => null,
    p_county_code => null,
    p_city_code => 'SAN_FRANCISCO',
    p_postal_code => null,
    x_return_status => err_status,
    x_error_msg => err_msg);

-- to populate postal code with '94065'

JTF_TTY_GEOSOURCE_PUB.create_geo(p_geo_type => 'POSTAL_CODE',
    p_geo_name => '94065',
    p_geo_code => '94065',
    p_country_code => 'US',
    p_state_code => 'CA',
    p_province_code => null,
    p_county_code => null,
    p_city_code => 'SAN_FRANCISCO',
    p_postal_code => '94065',
    x_return_status => err_status,
    x_error_msg => err_msg);

COMMIT;

```

```
END;  
/
```

DELETE_GEO API

This API deletes a geography. This is the API you will use to delete geographic data into the JTF_TTY_GEOGRAPHIES table.

Procedure Specification:

```
delete_geo(  
  p_geo_type IN VARCHAR2,  
  p_geo_code IN VARCHAR2,  
  p_country_code IN VARCHAR2,  
  p_state_code IN VARCHAR2 default null,  
  p_province_code IN VARCHAR2 default null,  
  p_county_code IN VARCHAR2 default null,  
  p_city_code IN VARCHAR2 default null,  
  p_postal_code IN VARCHAR2 default null,  
  p_delete_cascade_flag IN VARCHAR2 default 'N',  
  x_return_status IN OUT NOCOPY VARCHAR2,  
  x_error_msg IN OUT NOCOPY VARCHAR2)
```

Example to delete state of 'Texas'

```
JTF_TTY_GEOSOURCE_PUB.delete_geo(p_geo_type => 'STATE',  
                                p_geo_code => 'TX',  
                                p_country_code => 'US',  
                                p_state_code => 'TX',  
                                p_province_code => null,  
                                p_county_code => null,  
                                p_city_code => null,  
                                p_postal_code => null,  
                                p_delete_cascade_flag => 'N',  
                                x_return_status => err_status,  
                                x_error_msg => err_msg);
```

UPDATE_GEO API

This API updates a geography. This is the API you will use to edit geographic data into the JTF_TTY_GEOGRAPHIES table.

Procedure Specification:

```
update_geo(  
  p_geo_id IN VARCHAR2,  
  p_geo_name IN VARCHAR2,  
  x_return_status IN OUT NOCOPY VARCHAR2,  
  x_error_msg IN OUT NOCOPY VARCHAR2)
```

Example to update country name

```
JTF_TTY_GEOSOURCE_PUB.update_geo(p_geo_id => 249203,  
                                p_geo_name => 'CANADA',  
                                x_return_status => err_status,
```

```
x_error_msg => err_msg);
```

Enabling Qualifiers

In order to implement named account territories you must minimally enable the POSTAL CODE qualifier. See *Enabling Existing Qualifiers*, page 5-7 for the procedure.

Setting Up Export

To use the export to Microsoft Excel and upload from spreadsheet features you need to do the following:

1. Install the Oracle Web Applications Desktop Integrator Patch Set B (2677750).
2. Enable *Initialize and script Active X controls not marked as safe* in your browser.

Creating a Parent Territory

A parent territory must be created in Forms before you can implement named account territories. The parent territory must be any one of the top 5 levels of the territory hierarchy. See *Creating Individual Territories*, page 5-8 for the procedure for creating the parent territory.

Creating Geography Territory Groups

When you create a geography territory group you specify a group of 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, quotes, or accounts. Use this procedure to create a geography territory group and designate specific geographies to be included in the territory group.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales Administrator

Navigation

Territory Manager > Territories > 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 taken 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.
 1. Use the LOV to select a role from CRM Resources.
 2. Select the access types for the role. Choices are account, lead, and opportunity.
 3. 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.

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

The Define Role Access page appears.

7. If you want to add additional roles, then click **Add Another Row** and repeat from step a.
8. 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.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Territory HTML Sales User

Navigation

Salesperson > Geography

Prerequisites

- A geographic territory group must first be created, page 7-6 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.

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 named accounts.
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.

Restrictions

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

Concurrent Programs

It is important to run concurrent programs regularly to update territory information. See *Running Concurrent Programs*, page 5-13.

Verify and Troubleshoot

This chapter covers the following topics:

- Verification Tasks
- Troubleshooting Export to Excel
- Tips for Fine-tuning Territory Assignment Performance
- If the Generate Territory Packages Fails
- Frequently Asked Questions (FAQs) about Transaction Qualifiers
- Diagnostic Reports

Verification Tasks

Verify your implementation by performing one or more of the following tasks:

1. Create a territory for your usage and run the concurrent program.
2. Create a transaction for your usage.
3. Verify that the transaction is assigned to the correct resources.

Troubleshooting Export to Excel

Please refer to the Oracle Web Applications Desktop Integrator User Guide for more information when you troubleshoot your export to Excel. Following are some troubleshooting notes:

- If images are not displaying properly in the Web ADI page flow, then check the following profile options :
 - BNE UX Base Path: Default value is `"/OA_HTML/cabo"`
 - BNE UX Physical Directory: This should be set to the physical directory that is mapped to the value being used for BNE UX Base Path. The default is derived by looking up the Java system variable `OA_HTML` in `jserv.properties`. If `OA_HTML` cannot be found, then a search is done for `MEDIA_DIRECTORY`. Once the path of either of these is found, it is appended with `"/cabo/"`.
- If you are getting an "Unexpected error" during download, then make sure that the log file has the write permission. The log file name and directory are specified by the following profile options:
 - BNE Server Log Filename: default value `bne.log`

- BNE ServerLog Directory: default is \$FND_TOP/log
- Oracle Web ADI provides a diagnostic tool named BNETEST to confirm the configuration of Web ADI. To run this tool, download the patch for the diagnostic tool that matches the version of Web ADI you have installed and enter the following URL: `http://:/:servlets/BNETEST`

Tips for Fine-tuning Territory Assignment Performance

Comparison Operators

Avoid using "<>" operator.

Additional Tips

The following tips can be useful.

- Set up territories in hierarchical fashion for easy maintenance.
- Make the territories as generic as possible.
- If you create a territory and do not assign resources to it, then the Territory Manager does not return this territory as a winning territory.
- You can create your own module specific "Catch All."

If the Generate Territory Packages Fails

If you run the Generate Territory Packages concurrent request and it errors out, run it again with the Debug and Trace flags set to Yes. Then review the log file that results. The log file gives clear information on exactly what step the error occurred at in the program and what the error is.

Frequently Asked Questions (FAQs) about Transaction Qualifiers

The following are frequently asked questions about transaction qualifiers. Answers to these questions may help you in troubleshooting problems with Territory Manager.

How to Find All Seeded Transaction Qualifiers?

Answer: Use the following steps to list all seeded transaction qualifiers:

Steps

1. Log in with the CRM Administrator responsibility.
2. Select **Territory Manager > Territory Administration** to open the Navigator window.
3. Select **Setup Qualifiers** from the Administration pull-down menu.

The Setup Qualifier window opens.

4. Select the type of Usage. In the status area select All, then click **Find**.

The Setup Qualifier window opens with the seeded transaction qualifiers that match the selected usage information including a description, transaction type, and an organization.

5. Select different Usage to find other seeded transaction qualifiers if necessary

How to Find Possible Transaction Qualifier's Values?

Answer: In the Transaction Qualifiers tab, you must enter at least three letters in order 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.

What is Customer Name Range Transaction Qualifier?

Answer: Customer Name Range is used to group similar customer names. It allows you to define access based on pre-defined customer names.

What Is the Difference Between the Following Service Transaction Types?

Service Request: This transaction type allows you to define access for account and service request related transaction qualifiers. It limits the transaction access to a service request only.

For example, a territory is defined with appropriate rank information and has Service Request transaction type identified. That territory can be a winning territory among other competitive territories only if it is for a service request transaction, but not a task or a task associated with a service request transaction.

Task: This type allows you to define access for account and task related transaction qualifiers. It limits the transaction access to a task only, not a task created within a service request.

Service Request and Task: This type allows you to define access for account, task and service request related transaction qualifiers. However, it limits the transaction access to a task associated with a service request only, not a task or a service request.

For example, a territory is created with "Service Request" and "Task" transaction types. When a transaction is lunched through a task within a service request, that territory will not be selected as a winning territory even the qualifier and its value is matched to the transaction (a task associated with a service request).

Diagnostic Reports

Run diagnostic reports using the following steps and send the reports to Support:

1. Log into HTML APPS as SYSADMIN/SYSADMIN.
2. Select the Diagnostics tab. This opens a new window.
3. Select the Basic tab in the new window.
4. Change the Application to **CRM Foundation**.
5. Select **Territory Manager** in the left menu.
6. Click **Run Without Prerequisite**.
7. Click **Report** to see the report details.

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