



Siebel Territory Management Guide

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1

What's New in This Release

What's New in Siebel Territory Management Guide, Version 7.8

Siebel Territory Management is a new module for the 7.8 release.

2

Overview of Territory Management

This chapter is about the concepts and terminology required to understand the Siebel Territory Management product.

It includes the following topics:

- ["About Territory Management" on page 7](#)
- ["Terminology For Territory Management" on page 8](#)
- ["Roadmap to Territory Management for Life Sciences" on page 10](#)

About Territory Management

The purpose of Siebel Territory Management is to manage sales and service territories. For example, territory management can be used to assign sales representatives to account and contact teams or to assign ownership of assets to field service engineers. Rules are created (or bulk loaded) in the application. These rules determine how the assignments are made. The results of these rules can be reviewed before the actual assignments are made in the database.

Siebel Territory Management creates rule groups that Siebel Assignment Manager runs to assign positions to accounts, contacts, and assets.

Why Is Territory Management Important?

Maintaining sales representatives and their managers is a major cost to organizations. For this reason, it is so important to keep territories well aligned. You want to make sure that your sales representatives are working most efficiently. You do not want sales representatives without enough accounts to fill their time. Similarly, you do not want sales representatives to have so many accounts that they lose key opportunities because they cannot call on all their accounts.

The same concerns affect the costs of keeping service engineers in the field.

Siebel's Territory Management module does not tell you how to align your territories, but it is designed to make both major and minor territory alignments faster and simpler so that you can align and realign your territories as needed.

About Territory Management for Siebel Industry Applications

This guide uses Life Sciences examples to describe the features of Territory Management. However, you can use Territory Management with the other Siebel Business applications.

NOTE: Geo zone rules and assignment by asset are only available for the Siebel Vertical (Industry Solution) applications.

Terminology For Territory Management

Table 1 on page 8 defines some terms that are used in this book and in the application’s user interface.

Table 1. Terms Used in Territory Management

Term	Description
territory	<p>A territory is a collection of accounts, contacts, assets, or a combination thereof that are assigned to a particular position. Usually a territory is based on a geographic area: either a collection of postal codes or geo zones.</p> <p>For example, a sales representative in the San Francisco area has a territory consisting of all neurologists (contacts) and teaching clinics (accounts) in ZIP Codes for the city. Also as part of her territory, she is assigned some accounts outside the city where she already has established strong relationships.</p> <p>Territories can be related to each other through the territory hierarchy.</p> <p>The word territory is used other places in the UI, where it is not related to the Territory Management feature described in this guide. For example, the Territory field in the Accounts form is unrelated to the Territory Management feature.</p>
territory hierarchy	<p>The territory hierarchy is a collection of territory nodes. It determines which territories are active and available for assignment.</p> <p>For example, territories may be defined for the whole country, but, if a territory hierarchy only contains active territories for the southwest region, only this region of the country is considered for update when the territory alignment (for this hierarchy) is run.</p> <p>The territory hierarchy is also used to set up parent-child relationships between territories, and these relationships can be displayed graphically in an explorer view.</p>
territory nodes	<p>Territory node records determine the structure of the territory hierarchy.</p> <p>A territory node record is created for each territory in the hierarchy. The territory nodes can be linked to each other by specifying parents for nodes. The activation dates associated with territory nodes determine whether the territory is considered active, that is, available for assignment.</p>
division	<p>In Territory Management, a division is typically used to represent a sales force. A division may only be associated with one territory hierarchy. However, you can have multiple divisions in one territory hierarchy.</p> <p>For example, the oncology sales force and the neurology sales force can together make up the specialty territory hierarchy.</p>

Table 1. Terms Used in Territory Management

Term	Description
territory alignment	<p><i>Territory alignment</i> is the mapping of positions, accounts, contacts, and assets to territories. This mapping is determined through rules.</p> <p>The territory alignment record contains both the rules describing the alignment and the assignments that will be made as a result of the rules being applied.</p> <p>When a territory alignment is run, the results of the rules are calculated. However, the reassigning of positions to actual accounts, contacts, and assets in the database does not happen until the alignment becomes active.</p> <p>Territory Management supports two kinds of alignment: major and minor.</p>
rules	<p>Rules determine how territories are mapped to positions, accounts, contacts, and assets.</p>
geo zones	<p>A <i>geo zone</i> represents a geographic area. Geo zones are used as alternatives to postal codes, for example, where sales data is not available by postal code but is available by some other geographic area.</p> <p>In the pharmaceutical industry, geo zones are often called <i>bricks</i>.</p> <p>Geo zones are only configured in the Siebel Vertical (Industry Solution) applications.</p>

Roadmap to Territory Management for Life Sciences

Figure 1 presents an overview of how the territory alignment process works, from initial setup through maintaining the alignment to periodic realignments.

NOTE: If you cannot view flowchart graphics, please refer to *Accessibility Guide for Siebel Business Applications*.

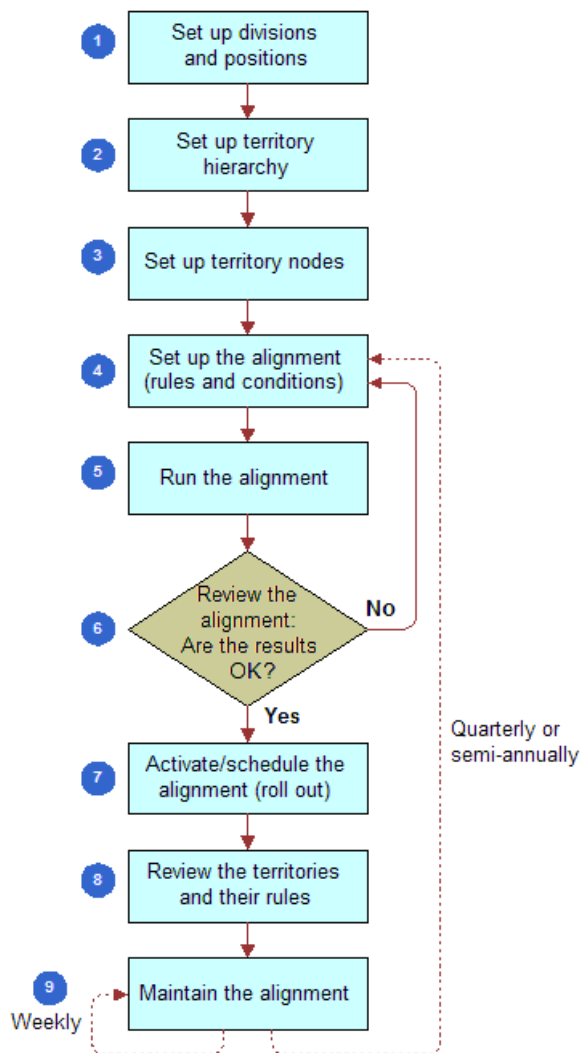


Figure 1. Roadmap for Territory Management in Life Sciences

Steps 1–3. See [Chapter 3, “Getting Started with Territory Management”](#)

Steps 4–9. See [Chapter 4, “Running Territory Alignments”](#)

Steps 7–9. See [Chapter 5, “Activating and Maintaining Territory Alignments”](#)

3

Getting Started with Territory Management

This chapter is about the administrative tasks you have to perform before you can start running territory alignments. It includes the following topics:

- [“About Getting Started with Territory Management” on page 13](#)
- [“About Territory Hierarchies and Divisions” on page 13](#)
- [“Administrator Setup Tasks for Territory Management” on page 15](#)
- [“Setting Up Divisions and Positions for Territory Management” on page 16](#)
- [“Setting Up a Territory Hierarchy” on page 16](#)
- [“Setting Up Territory Nodes” on page 17](#)
- [“Configuring End-Date Behavior for Territory Nodes” on page 20](#)

About Getting Started with Territory Management

This chapter lists the applications administration tasks that are specific to Territory Management. Use this chapter in combination with the *Applications Administration Guide* and the *Security Guide for Siebel Business Applications*.

The *Applications Administration Guide* and the *Security Guide for Siebel Business Applications* cover the setup tasks that are common to all Siebel Business Applications, such as using license keys, defining employees, and defining your company’s structure. The *Applications Administration Guide* also provides the information that you need to perform data administration and document administration tasks.

This guide assumes that you have already installed or completed the upgrade of your Siebel application. If you have not, go to the Installation/Upgrade section of the Siebel Bookshelf and click the links to the guides that are relevant to your company’s implementation.

The *Siebel Installation Guide* for the operating system you are using describes how to create the Siebel Administrator account that is used to perform the tasks described in this guide.

About Territory Hierarchies and Divisions

[Figure 2 on page 14](#) shows an example of a hierarchy made up of two sales forces (or in Siebel terminology, *divisions*).

Depending on your business needs, you may choose to have one division in your territory hierarchy or multiple divisions in the territory hierarchy. For large hierarchies, it may be better to set up several divisions. This option gives you more flexibility when running territory alignments. With multiple divisions, you can run an alignment for a whole territory hierarchy or for just one division at a time within a territory hierarchy. [Figure 2](#) shows a territory hierarchy made up of two divisions.

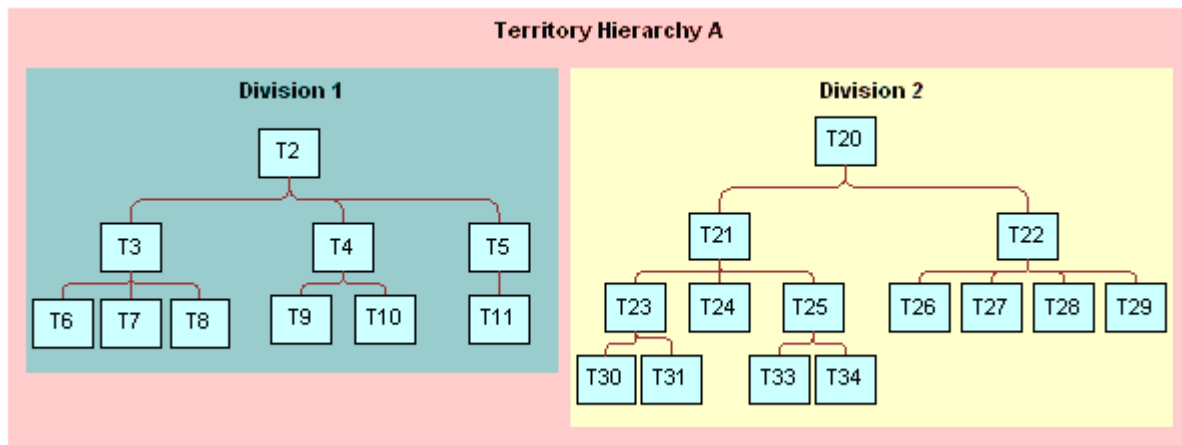


Figure 2. Schematic Example of a Territory Hierarchy Made Up of Two Divisions

Position Reporting Structure and Territory Hierarchy

Usually, but not necessarily, the position reporting structure in the division matches the territory hierarchy. That is, primary employees who are assigned to child territories usually report to the manager who is the primary for the parent territory. For example, referring to [Figure 2](#), if territory 6 is the child of territory 3, the sales representative assigned to territory 6 reports to the sales manager who is assigned to territory 3.

However, this need not be the case. For example, the sales representative for territory 8 leaves the company. You assign territory 8 to the sales representative for territory 10. This sales representative now has two territories and continues to report to the sales manager for territory 4 (not the sales manager for territory 3).

There is a feature in Territory Management that you can use to automatically reassign the reporting structure so that it parallels your territory hierarchy. The reporting structure can be updated territory-by-territory or for a whole hierarchy at time.

Administrator Setup Tasks for Territory Management

Table 2 on page 15 lists and describes the administrative setup tasks that are specific to Siebel Territory Management. The table also directs you to documentation that provides information about each task.

Table 2. Territory Management Administrative Tasks

Administrative Task	Description	For More Information
Setting up accounts and contacts	If you are going to be assigning accounts and contacts to territories, make sure that the data for these objects is accurate and complete.	<i>Applications Administration Guide</i>
Setting up assets	If you are going to be assigning assets to territories, make sure that the data for these objects is accurate and complete.	<i>Siebel Field Service Guide</i>
Setting up geo zones (or bricks)	You can define your territories by geo zone instead of by postal code. For example, if your syndicated data is provided for geo zone, then define your territories by geo zone.	<i>Siebel Life Sciences Guide</i>
Setting up divisions and positions	In Territory Management, sales forces are represented by divisions. Before territory hierarchies can be created, you need to create a division and the positions for the employees who are to be assigned to territories.	"Setting Up Divisions and Positions for Territory Management" on page 16
Setting up a territory hierarchy and territory records	Part of this set up process is to list (create records for) all the territories that the sales forces in your hierarchy use. You can choose later (through rules) how you want to define these territories and (through nodes) which territories you want to include in a given alignment.	"Setting Up a Territory Hierarchy" on page 16
Setting up territory nodes in the hierarchy	Territory nodes define which territories are active (available for assignment) and territory nodes determine the structure of the hierarchy.	"Setting Up Territory Nodes" on page 17
Setting up Assignment Manager's load splitter	Set up of the load splitter is required for running and activating alignments. Make sure to set the ActivationLoadBalancerConfig and RunAlignmentLoadBalancerConfig system preferences to the Configuration IDs for the load splitter configurations that you want to use.	<i>Siebel Assignment Manager Administration Guide</i> (for Assignment load splitter configuration)

Setting Up Divisions and Positions for Territory Management

In Territory Management, divisions are used to represent sales forces. Typically, you want to create a division for each of your sales forces. For example, a pharmaceutical company creates three divisions, one each for the neurology, cardiovascular, and oncology pharmaceutical sales forces.

Positions are assigned to the divisions. These positions represent the job roles in your sales force. Typically, you have one position for each employee in your sales force. (An exception to this might be if two part-time employees share a full-time job.)

If your employees already use the Siebel application, appropriate divisions and positions are probably already set up.

To create a division and positions

- 1 Create a division for each of your sales forces.
- 2 Add positions to the division.

See the *Security Guide for Siebel Business Applications* for general information about creating divisions and positions.

NOTE: When you create positions (and elsewhere on the UI), you see a field called Territory; this field is not related to Territory Management.

Setting Up a Territory Hierarchy

In this task, you create the record for the territory hierarchy, then assign the hierarchy to the division, and then add the territory records.

At this stage, you create the territory records and can give them names that reflect geographic areas. However, you do not define specific postal codes (or geo zones); this specification is made later as part of the territory alignment. For example, you may create a territory record once, create a new territory node for it every six months, determine its boundaries when you do major alignment, and then adjust its boundaries monthly in a minor alignment.

NOTE: For information about creating territories through bulk loading, see [Chapter 6, "Using EIM with Territory Management."](#)

To create a territory hierarchy and territory records

- 1 Create the territory hierarchy record:
 - a Navigate to the Territory Management screen > Hierarchies List view.
 - b Create a new record and complete the necessary fields.
- 2 Assign the territory hierarchy to divisions:
 - a Navigate to the Group Administration screen > Internal Divisions view.

- b** Select the division that represents the sales force.
See [“Setting Up Divisions and Positions for Territory Management”](#) on page 16.
 - c** In the Territory Hierarchy field, specify the territory hierarchy for the division.
TIP: Use the [Columns Displayed](#) command to make the Territory Hierarchy field visible in the Divisions list.
 - d** If your hierarchy contains multiple divisions, repeat [Step b](#) and [Step c](#) until the territory hierarchy has been associated with all divisions.
- 3** Create the territory records:
- a** Navigate to the Territory Management screen > Territories List view.
 - b** Create a new record and complete the necessary fields.
Some fields are described in the following table.
- | Field | Comments |
|-------------|---|
| Territory # | This is typically a number or a number-letter combination. |
| Division | Make sure you have specified the hierarchy before entering the division. You can only specify divisions that belong to the hierarchy. |
- c** Repeat [Step b](#) until all records for all territories in the territory hierarchy have been added.

Setting Up Territory Nodes

About Territory Nodes

Territory nodes determine whether a territory is available for assignment. You need to have an active node for each territory that you want to have assigned. To be active, a node must have a start date in the past and either no end date or an end date in the future.

About Structuring Territory Nodes as a Family Tree

Territory node records are also used to determine the structure of the territory hierarchy. The structure of the territories in the hierarchy is created by specifying parent-child relationships between territory nodes. These relationships create a family-tree structure for your hierarchy.

You do not have to specify parent-child relationships for the territory nodes in your hierarchy. Some or all your nodes can have no parent, and territory assignment will be made. However, there are advantages to structuring territory nodes into a family tree:

- You can generate a reporting hierarchy. For information, see [“\(Optional\) Generating Reporting Structures Based on Territory Hierarchy”](#) on page 55.
- The software maintains consistent start and end dates for child nodes based on the dates you set for the parent node.

- You can view this tree structure in the Territory Explorer view. This is a good way to review and understand the arrangement of your hierarchy. [Figure 3 on page 18](#) shows an example of this tree structure in the Territory Explorer view.

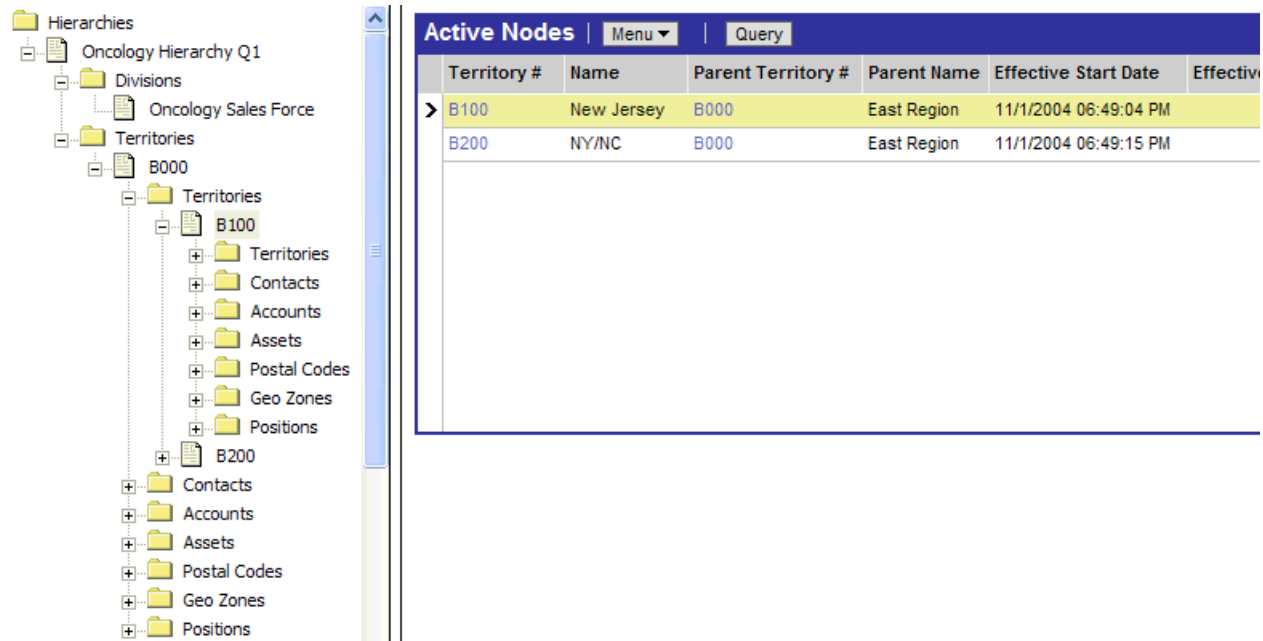


Figure 3. Territory Explorer View

Restrictions on Effective Start and End Dates for Territory Nodes

For many situations, good practice is to keep all the end dates the same (or blank) for the territory nodes in your hierarchy.

There are various restrictions related to start and end dates on territory nodes. These restrictions are designed to:

- Maintain data integrity by not allowing expired nodes to be edited or deleted
- Prevent orphan nodes by not allowing parent nodes to expire before their children

Some of these restrictions are:

- You can only edit a record if the end date is in the future.
- You cannot delete active or expired territory nodes. You can only delete nodes where the start date is in the future.
- You cannot set a parent node to expire before its children. The end dates for the children are automatically brought forward to match the parent's end date.
- You cannot have two nodes for the same territory with overlapping dates. The start date for second node must be on or after the end date of the first node.

For information about configuring start and end dates for nodes, see ["Configuring End-Date Behavior for Territory Nodes"](#) on page 20.

Procedure

NOTE: For information about creating territory nodes through bulk loading, see Chapter 6, ["Using EIM with Territory Management."](#)

To create territory nodes

- 1 Navigate to the Territory Management screen > Hierarchies List view.
- 2 Drill down on the hierarchy record.
- 3 In the Territory Nodes list, create a node record for each territory, and complete the fields.

If you are specifying parent-child relationships between nodes, create the parent nodes before creating the children.

Some fields are described in the following table.

Field	Comments
Territory #	Specify a territory that you created in "Setting Up a Territory Hierarchy" on page 16.
Parent Territory #	You can select only active and future nodes. (Expired nodes cannot be selected as parents.)
Effective Start Date	Typically, you enter dates that are in the future; because you are running, reviewing, and refining a territory alignment some weeks before you are rolling it out.
Effective End Date	When you create a new territory node record, the Effective Start Date field defaults to the current day + 1. For more information about these fields, see "Restrictions on Effective Start and End Dates for Territory Nodes" on page 18.

Configuring End-Date Behavior for Territory Nodes

In the preconfigured application, territory node records become read-only when a record's effective end date has passed.

Depending on your business requirements, you may want to reconfigure this behavior so that territory node records do not become read-only after the effective end date.

To allow territory nodes to be edited after the effective end date

- In Siebel Tools, for the Territory Hierarchy Node business component, inactivate the user property called BC Read Only Field.

4

Running Territory Alignments

This chapter is about setting up and refining the rules for territory alignments. It includes the following topics:

- ["About Territory Alignments: Major and Minor" on page 21](#)
- ["About Rules for Territory Management" on page 22](#)
- ["About Conditions in Territory Management" on page 24](#)
- ["Scenario for Running Territory Alignments" on page 28](#)
- ["Process of Setting Up and Running Territory Alignments" on page 29](#)
- ["Setting Up Territory Alignments" on page 29](#)
- ["Running Territory Alignments" on page 32](#)
- ["Viewing Results of Territory Alignment Runs" on page 35](#)
- ["Tracking Information About Territory Alignments" on page 36](#)
- ["Configuring Additional Attributes for Territory Conditions" on page 37](#)

About Territory Alignments: Major and Minor

There are two types of territory alignment that you can run, major and minor:

- **Major.** Typically, you want to run major alignments when you run an alignment for a sales force for the first time and when you make significant changes to an alignment. Major alignments provide a full refresh of the alignment. To a first approximation, the major alignment drops existing rules from the territories and adds the new rules from the major alignment.
- **Minor.** Typically, you want to run minor alignments at other times, when you are making smaller changes to a sales force that has already been aligned. The minor alignment takes the current alignment more into consideration, maintaining the alignment by both adding and dropping rules.

CAUTION: An important exception: The primary position on each object and any positions that have been assigned manually are not removed during the activation of an alignment.

About Objects with Multiple Addresses

Postal code and geo zone rules can assign accounts or contacts with multiple addresses to more than one territory.

For example, if an account has two addresses that are in different ZIP Codes and the postal code rules assign these ZIP Codes to different territories, then sales representatives for both territories are assigned to the account team.

About Rules for Territory Management

To perform a territory alignment, you need to set up rules that map the territories to positions. You also need to set up rules to map territories to at least one of the following:

- Accounts
- Contacts
- Assets
- Postal codes
- Geo zones (bricks)

Direct Rules, Indirect Rules, and Conditions

Table 3 lists the types of rules you can create for territory assignment.

Table 3. Direct Rules, Indirect Rules, and Conditions

Rule Type	Applies to...	This Type of Rule...	Examples
Direct rule	Accounts, contacts, and assets	Assigns one account, contact, or asset to one territory.	<i>Add:</i> Dr. Mike Adler is assigned to territory A102. <i>Drop:</i> City Hospital is removed from territory A102.
Indirect rule	Postal codes and geo zones ¹	Assigns the accounts, contacts, assets, or a combination thereof in a given area (postal code or geo zone) to one territory.	<i>Add:</i> Assets in ZIP Code 07920 are assigned to territory A102. <i>Drop:</i> Accounts in geo zone 42 are removed from territory T85.
Position rule	Positions	Assigns one position to one territory.	<i>Add:</i> Assign position Sales Rep 3 to territory A102. <i>Drop:</i> Remove position Sales Rep 4 from territory A102.
Global condition	Accounts, contacts, and assets	Constrains the set of accounts, contacts, or assets available for assignment by indirect rules. Conditions can be combined using AND or OR.	Limit contacts available for assignment to those who have been called on this year.
Local condition	Accounts, contacts, and assets within a given territory, postal code, geo zone, or combination ²	Further restricts the set of accounts, contacts, or assets available for assignment by indirect rules, on a per territory, postal code or geo zone basis. ²	Limit the contacts in geo zone 42 to those where Last Call Date > 01/01/05.

1. Asset assignment for geo zones is not available in the preconfigured application.

2. Specific conditions cannot be used to relax global conditions.

About Conditions in Territory Management

Conditions are used to limit the pool of objects (accounts, contacts, and assets) that are available for assignment by indirect rules. This section presents some important points and some examples of how conditions can be used in Territory Management. Because conditions cannot be explicitly grouped, the conditions that you can create for territory alignments are somewhat limited, and you need to understand these limitations in order to use conditions effectively.

What Is Scope?

For global conditions, a scope is a set of conditions for the same object type. For local conditions, a scope is a set of conditions for a given object type, territory, postal code, and geo code combination. [Figure 4 on page 24](#) shows five scopes, some global and some local.

Sequence ▲	Object	Attribute	Operator	Value	Territory #	Postal Code	Geo Zone	And/Or	
0	TM Contact	Primary Specialty	=	Cardiology				AND	Global Scope
1	TM Contact	Last Call Date	>	01/01/05				AND	
100	TM Account	Account Type	=	Hospital				OR	Global Scope
101	TM Account	Account Type	=	Clinic				AND	
102	TM Account	Account Status	=	Active				AND	
500	TM Contact	Job Title	=	Doctor	T2	94404		OR	Local Scope
501	TM Contact	Contact Type	=	Physician	T2	94404		AND	
600	TM Account	Beds	<	200		07078		AND	Local Scope
700	TM Account	Account Type	<	250		20190		AND	Local Scope

Figure 4. Global and Local Scopes

Important Points about Condition Evaluation

Table 4 summarizes important points about how conditions are evaluated.

Table 4. Important Points about Condition Evaluation

Evaluation Behavior	This Means That . . .	See . . .
Within a given scope, conditions are evaluated in pairs according to their sequence number.	A OR B AND C is evaluated as: [(A OR B) AND C]	Condition Example 1
The last AND/OR operator in the scope is ignored.	The AND operator is always applied between global and local conditions.	Condition Examples 1, 2 and 3
For a given scope, place all the OR conditions first or all the AND conditions first.	You cannot put OR conditions between AND conditions or vice versa.	Figure 5 on page 25
The AND/OR operator applies only within conditions of the same scope.	The AND operator is always applied between global and local conditions.	Condition Examples 2 and 3
Local conditions for different scopes are handled separately.	A AND B AND c AND <i>d</i> OR <i>e</i> where A and B are global conditions, c is a local condition, and <i>d</i> and <i>e</i> are also local conditions but in a different scope from c . is evaluated as: [(A AND B) AND c] OR [(A AND B) AND (<i>d</i> OR <i>e</i>)]	Condition Example 3
For condition attributes that are dates, only the date is used. (Do not include the time.)	The date 01/01/05 is interpreted as 01/01/05 12:00:00 AM in the server time zone.	About Using Dates as Attributes for Conditions

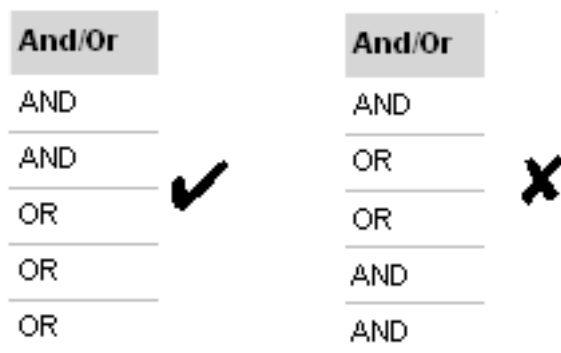


Figure 5. Within a Scope, Group Like Conditions Together (ANDs with ANDs; ORs with ORs)

About Using Dates as Attributes for Conditions

The preconfigured application has three condition attributes for dates:

- Last Call Date (for TM_Contact)
- Installed Date (for TM_Asset)
- Purchase Date (for TM_Asset)

If you create conditions using any of these attributes, you need to be aware of the following:

- When you enter a value for a date attribute, enter the date only, for example, 06/08/05. Do not include the time.
- This date is interpreted by Assignment Manager as midnight in the server’s time zone, for example, 06/08/05 12:00:00 AM.
- Using the equals (=) operator with date attributes is not recommended. Use greater than or less than operators (<,<=,>,>=) or combine two conditions to specify a range.

Condition Example 1

You want to restrict the pool of contacts being assigned to those whose type is physician and who either specialize in cardiology or been called on since January 1, 2005 (by any position—internal or external to the sales force being aligned). For example, Contact A is assigned because he is a physician who specializes in cardiology, and Contact B is assigned because she is a physician who has been called on since January 2005.

The conditions you set up are shown in [Figure 6](#):

[(Last Call Date > 01/01/05) OR (Specialty = Cardiology)] AND (Contact Type = Physician)

Sequence ▲	Object	Attribute	Operator	Value	Territory #	Postal Code	Geo Zone	And/Or
0	TM Contact	Last Call Date	>	01/01/05				OR
1	TM Contact	Primary Specialty	=	Cardiology				AND
2	TM Contact	Contact Type	=	Physician				AND

— This condition operator is ignored.

Figure 6. Condition Example 1 (Global Conditions Only)

Condition Example 2

For most territories, you want to restrict the pool of contacts being assigned to those whose specialty is cardiology and who have been called on since January 1, 2005. These are global conditions.

For territory 1, you want to further limit the contacts assigned to those cardiology specialists who have been called on since January 1, 2005 and whose type is Physician. This is a local condition.

The conditions you set up are shown in [Figure 7](#):

(Specialty = Cardiology) AND (Last Call Date > 01/01/05) AND (For Territory=T1: Contact Type= Physician)

Sequence	Object	Attribute	Operator	Value	Territory	Postal Code	Geo Zone	And/Or
0	TM Contact	Primary Specialty	=	Cardiology				AND
1	TM Contact	Last Call Date	>	01/01/05				AND
300	TM Contact	Contact Type	=	Physician	T1			AND

These condition operators are ignored.

Figure 7. Condition Example 2 (Global and Local Conditions)

Condition Example 3

Condition Example 3 is similar to Condition Example 2: you want to restrict the pool of contacts being assigned to those whose specialty is cardiology and who have been called on since January 1, 2005, and for territory 1, you want to further limit the contacts to those whose type is Physician.

However, you want to add a second local condition scope: for ZIP code 94404 in territory 2, you want to restrict the contacts to those whose type is Physician or whose job title is Doctor.

The conditions you set up are shown in [Figure 8](#):

[(Specialty = Cardiology) AND (Last Call Date > 01/01/05)] AND (For Territory=T1: Contact Type = Physician)

OR

[(Specialty = Cardiology) AND (Last Call Date > 01/01/05)] AND [For Territory=T2 and ZIP 94404: (Job Title = Doctor) OR (Contact Type = Physician)]

Sequence	Object	Attribute	Operator	Value	Territory #	Postal Code	Geo Zone	And/Or
0	TM Contact	Primary Specialty	=	Cardiology				AND
1	TM Contact	Last Call Date	>	01/01/05				AND
401	TM Contact	Contact Type	=	Physician	T1			AND
500	TM Contact	Job Title	=	Doctor	T2	94404		OR
501	TM Contact	Contact Type	=	Physician	T2	94404		AND

These condition operators are ignored.

Figure 8. Condition Example 3

Scenario for Running Territory Alignments

This scenario provides an example of how alignments are set up and run by the territory administrator and his team. Your company may follow a different process according to its business requirements.

A pharmaceutical company is preparing for a major alignment of its neurology sales force. The group working on the territory alignment begin work well in advance of the due date. They want to make sure that all parties involved have input into the territory alignment and that there is time to do as many trial runs as necessary to get the alignment right.

The Administrator Sets Up Rules and Conditions

The first step is to set up the rules and conditions for the territory alignment.

Position rules. The group begin by creating the position rules that map each sales representative, sales manager, and district manager in the sales force to a territory. The sales representatives are assigned to territories that are child territories of the sales managers. Sales managers are assigned to territories that are child territories of the district managers. In some cases, multiple positions are assigned to one territory (where an experienced sales representative is working with a trainee). In other cases, multiple territories are assigned to a single position (where a high-performing sales representative has two territories).

Indirect rules. To a first approximation, this company bases its territory assignments on postal codes. They create rules that map postal codes to territories. Then, all contacts with addresses in those postal codes are indirectly mapped to territories.

Direct rules. In addition to assigning contacts to territories according to postal code, the company has some contacts that it wants to assign to certain sales representatives (territories) even though the contacts are outside the geographic area of the representative's territory. In many cases, assignments outside the geographic area occur because particular representatives have long-standing relationships with these contacts. Such assignments are made by creating direct rules that can assign individual contacts to particular territories.

Global Conditions. Because the neurology sales force does not call on all the contacts in the company's database, global constraints are used to constrict the contacts assigned. Only contacts who specialize in neurology are to be assigned.

Postal Code Conditions. In addition to the global conditions, some extra conditions are applied to specific postal codes. In some metropolitan areas, the company wants to further limit the neurologists assigned; for certain postal codes, only neurologists who have been called on within the last six months will be assigned.

The Administrator Runs, Reviews, Refines, and Reruns the Territory Alignment

After the rules and conditions have been set up, the administrator runs the alignment to review what the resulting territory assignments look like. He does a series of trial runs, making edits to the rules after each run. (These results are just written to a list. No actual changes are made to the sales representatives' territories until the alignment is *activated*.)

The administrator then creates a report of the results (territories listed with their assigned accounts, contacts, and sales representatives). He distributes this report to the sales managers, asking them for their feedback. The responses that the administrator receives lead to some rule changes and rerunning of the territory alignment. Now, he has a finalized set of rules and conditions that are ready to be used to roll out new territories for the sales force at the beginning of the next quarter.

Process of Setting Up and Running Territory Alignments

To set up and run territory alignments perform the following tasks:

- 1 "Setting Up Territory Alignments" on page 29
- 2 "Running Territory Alignments" on page 32
- 3 "Viewing Results of Territory Alignment Runs" on page 35.

After reviewing the territory alignment results, you can go back to [Step 1](#) to make changes to the territory alignment rules to optimize your results.

- 4 "Tracking Information About Territory Alignments" on page 36

Setting Up Territory Alignments

This topic describes how to create the alignment record and enter the rules and conditions that determine how objects and positions are assigned to territories.

NOTE: For information about creating rules and conditions through bulk loading, see [Chapter 6, "Using EIM with Territory Management."](#)

CAUTION: Before creating rules, make sure that you review ["About Rule Activation in Territory Management"](#) on page 43 and understand how the rules that you create in your alignments combine with any rules that are currently active in territories.

This task is a step in the ["Process of Setting Up and Running Territory Alignments"](#) on page 29.

To create a territory alignment record

- 1 Navigate to the Territory Management screen > Alignments List view.
- 2 Create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	The name of the territory alignment.
Hierarchy	This value is the territory hierarchy that you want to align.
Status	For information about this field, see "About the Status Field" on page 33.

Field	Comments
Type	Major or minor territory alignment. (See "About Territory Alignments: Major and Minor" on page 21.)
Division	If the territory hierarchy contains more than one division and you want to align only the territories in one of the divisions (not all territories in the hierarchy), enter a division in this field.
Activation Date	This value is the date in the future that you want the new assignments to take effect, that is, to be rolled out to all the sales representatives in the hierarchy (or in the division and hierarchy combination). Only territory nodes that are active on this date are included in the alignment.
Coverage	Indicate whether territory coverage is nationwide or sparse (for example, in metropolitan areas only).

- 3 Drill down on the alignment.
- 4 In the lower link bar, click Positions, and in the list, create rule records that map positions to territories.

Although you can assign a position from any division to a territory, in most cases, you only assign positions from the division that is associated to your territory hierarchy.

- 5 Create rules for assigning accounts, contacts, and assets to territories.

In the Lower Link Bar, Click...	Use This View to...
Contacts	Create direct rule records for contacts. Use contact rules to add (or drop) contacts directly to territories.
Accounts	Create direct rule records for accounts. Use account rules to add (or drop) accounts directly to territories.
Assets	Create direct rule records for assets. Use asset rules to add (or drop) assets directly to territories.
Postal Codes	Create indirect rules that assign contacts, accounts, and assets in specified postal codes to territories. If you create postal code rules, do not create geo zone rules.
Geo Zones	Create indirect rules that assign contacts and accounts in specified geo zones to territories. If you create geo zone rules, do not create postal rules.

TIP: The buttons on the Rules list provide shortcuts for creating rules, as described in the following table.

Button	Use this button to
Drop	Change the Action field from Add to Drop for selected records.
Move	Drop from one territory and add to another. The button changes the Action on the selected record to Drop and creates a new record where the Action is Add.
Copy From Territory	Create rules based on current rules for selected territories. (To view the current rules for territories, see "Viewing and Editing Rules for Individual Territories" on page 55.)

- 6 (Optional) Create conditions using the following substeps:
- a Click the Conditions view tab.

- b Create new records and complete the necessary fields.

Some fields are described in the following table. For information about conditions, see [“About Conditions in Territory Management” on page 24](#).

Field	Comments
Sequence	The sequence number is supplied automatically. You can edit the sequence field to reorder conditions, but some hard-coded restrictions apply according to the type of condition. For example, sequence numbers 0–299 are reserved for <i>global</i> conditions. (Global conditions apply to all objects and are not restricted to particular territories, postal codes, or geo zones.)
Object	Choose to apply the condition to accounts, contacts, or assets.
Attribute	You can configure new attributes using Siebel Tools. See “Configuring Additional Attributes for Territory Conditions” on page 37 .
Territory	You can use any of these alone or combine Territory with Postal Code or Territory with Geo Zone.
Postal Code	
Geo Zone	These are used to specify <i>local</i> conditions.
And/Or	For information about the And/Or operator, see “About Conditions in Territory Management” on page 24 .

Running Territory Alignments

When you run an alignment, a job is submitted to the Workflow Process Manager. The workflow creates assignment rules and submits a batch job to Assignment Manager. When the Assignment Manager job has finished, the results are presented in the Results view of the Territory Management screen.

No changes are made to the current assignments of accounts, contacts, or assets in the database—these changes do not occur until the alignment becomes active.

About the Status Field

The status field is an important indicator about the state of the alignment, from creation of the alignment record through to the rollout of the new assignments in the database. [Table 5](#) lists the possible values for the Status field.

Table 5. Possible Values for the Status Field in the Alignment Record

Status Value	Indicates That...	Part of Process
In Progress	The alignment record has been created but that the alignment has not yet been run. Additional information, such as activation date, rules, and conditions, may have been entered for the alignment record. The alignment remains In Progress until you click the Run Alignment button.	Creation
Creating Assignment Rules	Territory Management is creating an Assignment Manager rule group and Assignment Manager rules based on the alignment's rules and conditions.	Running
Splitting Assignment Tasks	Load Splitter is splitting the assignment tasks based on the load splitting configuration. For information about configuring the Load Splitter for alignment runs, see the <i>Siebel Assignment Manager Administration Guide</i> .	Running Activation
Identifying Affected Objects	Assignment Manager is searching the database to identify which objects (contacts, accounts, assets, or a combination thereof) are affected by the alignment. The purpose is to update only those objects' teams affected and not all object teams in the database.	Running Activation
Request Submitted	The request for alignment has been successfully submitted to Assignment Manager. When an alignment is run, this value is the final status. (You need to monitor the Server Management Administration screen > Tasks view to see when the Assignment Manager job is complete.)	Running
Moving Territory Rules	The rules defined by the alignment are being copied to each of the territories covered by the alignment. During this process, territory rules are compared against the alignment rules and updated accordingly.	Activation
Scheduling Assignment Run	An Assignment Manager job is being scheduled to run on the activation date.	Activation
Scheduled	The scheduling of the Assignment Manager job has completed, and the alignment is scheduled to run.	Activation

Table 5. Possible Values for the Status Field in the Alignment Record

Status Value	Indicates That...	Part of Process
Update Rules for Production	The assignment rules are being converted to reflect the production environment.	Activation
Active	<p>The request for alignment activation has been successfully submitted to Assignment Manager.</p> <p>When an alignment is activated, this value is the final status. (You need to monitor the Server Management Administration screen > Tasks view to see when the Assignment Manager job is complete.)</p>	Activation
Alignment Run Failed	<p>The alignment run did not complete successfully.</p> <p>This status can indicate some user-related issue such as:</p> <ul style="list-style-type: none"> ■ No position rules ■ Conflicting conditions ■ An alignment activation date before territory nodes effective start dates ■ No add rules (Every alignment must contain at least one add rule.) <p>It can also indicate some system-related issues, such as the server component Workflow Process Manager is not enabled.</p>	Running
Alignment Activation Failed	<p>The alignment activation did not complete successfully.</p> <p>This status can indicate some user-related issue such as:</p> <ul style="list-style-type: none"> ■ No position rules ■ An alignment activation date before territory nodes effective start dates <p>It can also indicate some system-related issues, such as the server component group Territory Management is not enabled.</p> <p>If the status is Alignment Activation Failed, the alignment cannot be rerun or reactivated. You need to copy the alignment, fix the problem, and then run and activate the copied alignment.</p>	Activation

Procedure

This task is a step in the [“Process of Setting Up and Running Territory Alignments”](#) on page 29.

To run a territory alignment

- 1** Review the dates on the territory nodes to make sure that all the territories that you want to assign have active nodes:
 - a** Navigate to the Territory Management screen > Hierarchies List view.
 - b** Drill down on the hierarchy record.
 - c** In the Territory Nodes list, review the Effective Start Date and Effective End Date for each territory.
- 2** Navigate to Territory Management screen > Alignments List view.
- 3** Select an alignment record.
- 4** Click Run Alignment.
- 5** Refresh the screen to monitor the status as the alignment runs.
For information about status values, see [Table 5](#).
- 6** When the status shown is Request Submitted, click Go to Server Tasks to view the status of the job submitted to the Assignment Manager.
When the alignment has finished running, you can see the results in the Territory Management screen > Alignments List view > Results view.

Viewing Results of Territory Alignment Runs

When the alignment has finished running, you want to look at the results. You can view them in the Results list views and, for printing and electronic distribution, you can create reports of the results.

This task is a step in the ["Process of Setting Up and Running Territory Alignments"](#) on page 29.

To view the results of a territory alignment

- 1** Navigate to Territory Management screen > Alignments List view.
- 2** Drill down on an alignment record.
- 3** Click the Results view tab.
- 4** In the lower link bar, click Contacts, Accounts, or Assets according to which results you want to view.
The results of the alignment appear in the list.
- 5** To save the results in a format that can be printed or distributed electronically, run a report.
(For information about running reports, see *Fundamentals*. For information about customizing reports, see *Siebel Reports Administration Guide*.)

Tracking Information About Territory Alignments

Performing territory alignment is a project that typically takes place over a period of weeks as initial alignments are run, results reviewed by multiple people, and rules and conditions adjusted to optimize the alignment.

You can use the Activities, Attachments, and Audit Trail views on the Territory Management screen to keep track of information about and changes made to an alignment.

This task is a step in the ["Process of Setting Up and Running Territory Alignments"](#) on page 29.

To keep track of alignment-specific information

- 1 Navigate to Territory Management screen > Alignments List view.
- 2 Drill down on an alignment record.
- 3 Click the Activities, Attachments, or Audit Trail view tab.

Subview	Use This Subview to...
Activities	<p>Create activities related to the alignment, assign the activity to the appropriate employee, and specify completion dates.</p> <p>Example: You have sent out the first draft of an alignment. You want to create an activity for every team member so that each one can review the alignment by the end of the week. During the week, you can look at the activity list to see which team members have completed their activity.</p>
Attachments	<p>Attach documents related to the alignment.</p> <p>Example 1: After creating a report of alignment results, you attach it to the alignment record.</p> <p>Example 2: After reviewing the report, a sales manager emails you with suggestions for additional changes to the alignment. You attach this email to the alignment.</p>
Audit Trail	<p>Audit Trail is not enabled in the preconfigured (out-of-the-box) application.</p> <p>The fields that can be audited are the fields in the form applet in the Alignments List view.</p> <p>For general information about Audit Trail, including how to enable it, see the <i>Applications Administration Guide</i>.</p>

Configuring Additional Attributes for Territory Conditions

In the preconfigured application the Attribute field for TM_Account, TM_Asset, and TM_Contact contains a short list of attributes that can be used for conditions in Territory Management.

For example, the attributes available for creating TM_Account conditions are Account Status, Account Type, and Beds, and you want to create conditions on the Industry field. The following procedure outlines the modifications you need to make in Siebel Tools to add additional attributes for creating conditions.

For general information about configuring workflow policy objects and columns and assignment attributes and columns, see the *Siebel Assignment Manager Administration Guide*.

To make additional attributes available for conditions

- 1 Add a new value to the Attribute LOV and complete the fields as follows:

Field	Value	Example
Type	TM_ASGN_ATTRIBUTE	TM_ASGN_ATTRIBUTE
Display Value	<i>Text string</i>	Industry Name
Language Independent Code	<i>Text string</i>	INDUSTRY NAME
Parent LIC	<i>TM Object Name</i>	TM ACCOUNT

For general information about adding a new value to an existing list of variables, see the *Applications Administration Guide*.

- 2 In the Alignment Condition business component (in Siebel Tools), create a new user property and complete the fields as follows:

Property	Value	Example
Name	Alignment Condition Attribute <i>n</i>	Alignment Condition Attribute 4
Value	<i>"Parent LIC", "LOV LIC", "criteria name", "business object name, business component name, component field name"</i>	"TM ACCOUNT", "INDUSTRY NAME", "Industry Name", "Account,Account,Industry"

- 3 Create a new workflow policy column record and complete the fields as follows:

Property	Example
Name	Industry Name
Table Name	S_INDUST
Column Name	NAME

Property	Example
PickList	PickList Industry
Source Field	Name

- 4 Add a new workflow policy component col:
 - a Navigate to the workflow policy object TM Account > workflow policy component Industry.
 - b Create a new workflow policy component col.
 - c Complete the fields as follows:

Property	Example
Workflow Column Name	Industry Name
Parent Name	Industry
Workflow Object Name	TM Account

- 5 Create a new assignment attribute record and complete the fields as follows; or, if the assignment record already exists, skip to [Step 6](#).

Property	Example
Bounded	TRUE
Data Type	Varchar
Name	Industry Name
Pick List	PickList Industry
Use Range	FALSE

- 6 For the assignment attribute you created in [Step 5](#), create a new assignment attribute column and complete the fields as follows:

Property	Example
Name	Industry Name
Assignment Object	TM Account
Workflow Policy Object	TM Account
Workflow Policy Component	Industry
Workflow Component Column	Industry Name

- 7 Create a new assignment criteria record and complete the fields as follows:

Property	Example
Name	Industry Name
Display Name	Industry Name
Team	FALSE
Use Expertise	FALSE

- 8 For the assignment criteria record you created in [Step 7](#), create a new assignment criteria attribute and complete the fields as follows:

Property	Example
Name	Industry Name
Assignment Attribute	Industry Name
Store Column	1
Display Sequence	1
Display Name	Industry Name

- 9 Add a field record for the new attribute to the “TOS” business components related to the condition object.

In this Industry Name example, to add the Industry field you need to create two new joins:

Property	Join 1	Join 2
Alias	S_ORG_INDUST	S_INDUST
Table	S_ORG_INDUST	S_INDUST
Outer	Y	Y
Destination Column (Join Specification)	OU_ID	ROW_ID
Source Field (Join Specification)	Id	Industry Id

And, add both the Industry and Industry Id to the TOS*Account business components:

Property	Field 1	Field 2
Name	Industry Id	Industry
Join	S_ORG_INDUST	S_INDUST
Column	INDUST_ID	NAME
Type	DTYPE_TEXT	DTYPE_TEXT
Force Active	Y	Y

The TOS*Account business components are:

- TOS Account
- TOS Target Alignment-Territory-Account
- TOS Target Alignment-Territory-Geo Zone-Account
- TOS Target Alignment-Territory-Postal Code-Account
- TOS Target Territory-Account
- TOS Target Territory-Geo Zone-Account
- TOS Target Territory-Postal Code-Account

5

Activating and Maintaining Territory Alignments

This chapter is about making the territory alignments active so that the account, contact, and asset assignments take effect in the database, and then maintaining the alignment. It includes the following topics:

- ["About Activating and Maintaining Territory Alignments" on page 41](#)
- ["About Rule Activation in Territory Management" on page 43](#)
- ["Illustrated Example for Indirect Rules in Territory Management" on page 47](#)
- ["About the Special Behavior for Position-Specific Contact Data in Life Sciences" on page 50](#)
- ["Scenario for Activating and Maintaining Territory Alignments" on page 50](#)
- ["Process of Activating and Maintaining Territory Alignments" on page 52](#)
- ["Activating Territory Alignments" on page 52](#)
- ["Rolling Back Major Territory Alignment Activations" on page 53](#)
- ["\(Optional\) Generating Reporting Structures Based on Territory Hierarchy" on page 55](#)
- ["Viewing and Editing Rules for Individual Territories" on page 55](#)
- ["Using Assignment Manager to Maintain Territory Alignments" on page 57](#)
- ["Removing Territory Nodes from Hierarchies" on page 59](#)

About Activating and Maintaining Territory Alignments

Activating

When you activate an alignment, Territory Management creates the actual assignment rules for the territories. (Assignment rules are not created when the alignment is run.) These are the rules that are used by Assignment Manager to assign positions to the account, contact, and asset records.

When you create the rules for territories, any existing rules that conflict with the new rules are set to expire on the activation date (or the roll-out date if the activation date is in the past).

Table 6 describes two slightly different activation behaviors, depending on if the activation date is in the future or the past.

Table 6. Scheduled Compared with Active

If the Activation Date Is...	Then Territory Management...	And, the Alignment Status Is...
In the future	Creates the rules for the territories and then schedules an Assignment Manager job to implement and roll out the rules on the activation date.	Scheduled, until the activation date Active, after the activation date
Now or in the past	Creates the rules for the territories and immediately Assignment Manager runs the job to roll out the rules.	Active

Maintaining

After the territory rules have been created, you can set Assignment Manager to rerun these rules at regular intervals. This action updates assignments as database records are added and changed.

About Rule Activation in Territory Management

CAUTION: Make sure that you understand the contents of the [Table 7 on page 44](#) and [Table 8 on page 45](#) before activating alignments. It is important to understand how various combinations of factors will affect your final territory rules.

These tables describe the territory rules that result when an alignment is activated. The creation, modification, and expiration of rules depends on a number of factors:

- Are the rules direct or indirect?
- Is the alignment major or minor?
- Is the Action flag set to Add or Drop?
- Does an active rule already exist for the territory (although with different start and end dates)?
- For an indirect rule, are the Assign Contacts, Assign Accounts, and Assign Assets flags set the same or differently for the rule in alignment and the territory?
- If an active rule already exists for the territory, is the activation date of the alignment before or after the effective start date of the current rule for the territory?

Table 7. Activation Behavior for Direct Rules

Align't Type	Action Flag	Defined in Align't	Defined in Terr.	Activation Date < Eff. Start Date	Activation Date ≥ Eff. Start Date
Major	Add	Yes	No	New territory rule	New territory rule
		Yes	Yes	New territory rule (After the activation, there are two rules with different start dates.)	No change on current territory rule
		No	Yes	No change on current territory rule	Set the effective end date to the activation date for current territory rule
	Drop	Yes	No	Drops are not processed (Same effect as Defined in Align't = N, Defined in Terr. = Y.)	
		Yes	Yes		
		No	Yes		
Minor	Add	Yes	No	New territory rule	New territory rule
		Yes	Yes	New territory rule	No change on current territory rule
		No	Yes	No change on current territory rule	No change on current territory rule
	Drop	Yes	No	Not applicable because there is no territory rule to drop	Not applicable because there is no territory rule to drop
		Yes	Yes	No change on current territory rule	Set the effective end date to the activation date for current territory rule
		No	Yes	No change on current territory rule	No change on current territory rule

Table 8. Activation Behavior for Indirect Rules

Align't Type	Action Flag	Defined in Align't	Defined in Terr.	Flags	Activation Date < Eff. Start Date	Activation Date ≥ Eff. Start Date
Major	Add	Yes	No	Same	New territory rule	New territory rule
		Yes	Yes	Same	New territory rule	New territory rule
		Yes	Yes	Different	New territory rule	No change on current territory rule
		No	Yes	Different	New territory rule	No change on current territory rule
	Drop	Yes	No	Same	Not applicable because there is no territory rule to drop	Not applicable because there is no territory rule to drop
		Yes	Yes	Same	No change on current territory rule	Set the effective end date to the activation date for current territory rule
		Yes	Yes	Different	No change on current territory rule	Set the effective end date to the activation date for current territory rule
		No	Yes	Different	No change on current territory rule	No change on current territory rule

Table 8. Activation Behavior for Indirect Rules

Align't Type	Action Flag	Defined in Align't	Defined in Terr.	Flags	Activation Date < Eff. Start Date	Activation Date ≥ Eff. Start Date
Minor	Add	Yes	No	Same	New territory rule	New territory rule
		Yes	Yes	Same	New territory rule	No change on current territory rule
		Yes	Yes	Different	New territory rule	Update territory rule flags (The flags checked will be the union of the flags in the alignment rule and the territory rule.)
		No	Yes	Different	No change on current territory rule	No change on current territory rule
	Drop	Yes	No	Same	Not applicable because there is no territory rule to drop	Not applicable because there is no territory rule to drop
		Yes	Yes	Same	No change on current territory rule	Set the effective end date to the activation date for current territory rule
		Yes	Yes	Different	No change on current territory rule	Deselect the common flags
		No	Yes	Different	No change on current territory rule	No change on current territory rule

Illustrated Example for Indirect Rules in Territory Management

This section shows an example of how a series of alignments affects the postal code rules for a given territory, B101.

The current postal code rule for the territory states that contacts and accounts in postal code 19142 are assigned to territory B101. The start date for the rule is January 1, 2005, and there is no end date. (See [Figure 9 on page 47.](#))

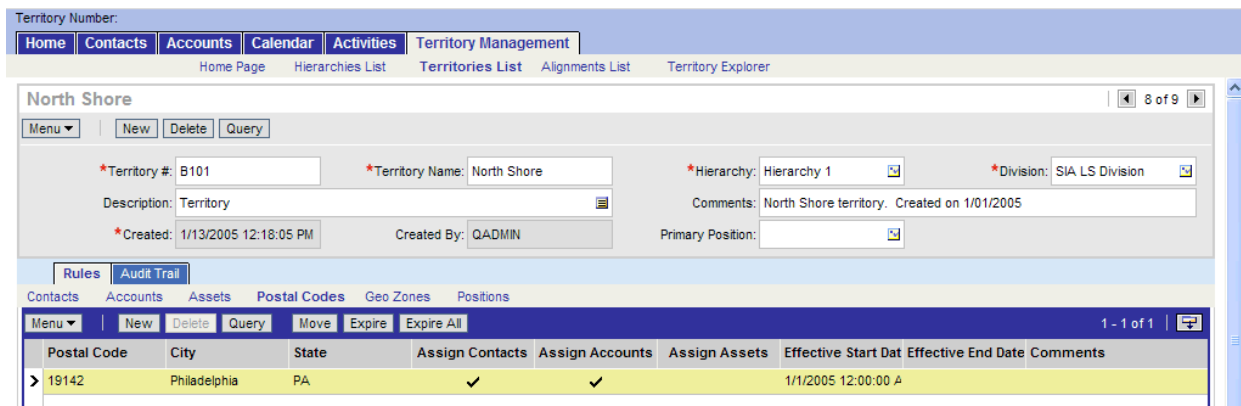


Figure 9. Territory B101, Initial State

On January 5th, 2005, the company runs a minor alignment. One rule in this minor alignment specifies that assets in postal code 19142 are assigned to territory B101. (See [Figure 10 on page 47.](#))

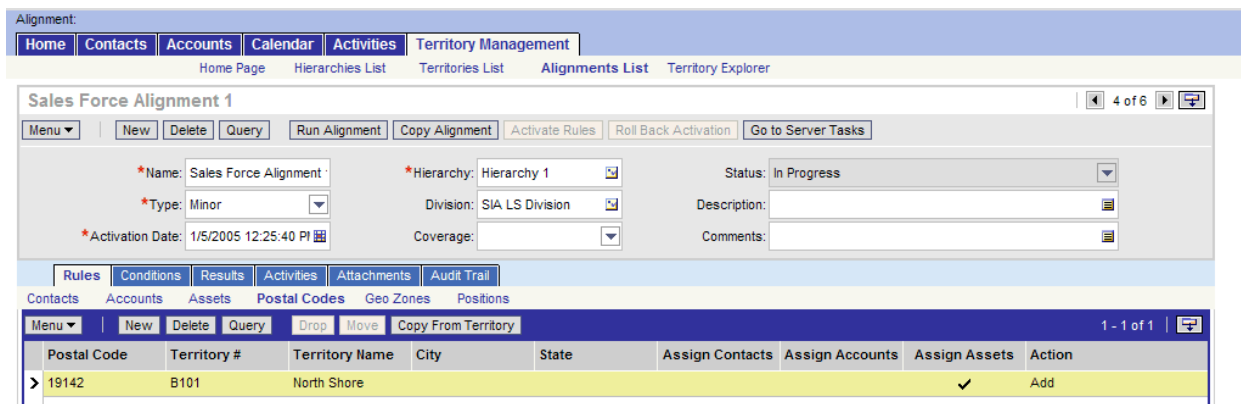


Figure 10. Minor Alignment to Include Assets in Postal Code 19142 for B101

Activating and Maintaining Territory Alignments ■ Illustrated Example for Indirect Rules in Territory Management

The effect of this minor alignment is to update the territory rule flags, such that the flags checked are the union of the flags in the alignment rule and the territory rule. The start date for the rule remains January 1, 2005, and flags are set for contacts, accounts, and assets. See [Figure 11 on page 48](#).

The screenshot shows the Siebel Territory Management interface for Territory B101. The top navigation bar includes 'Home', 'Contacts', 'Accounts', 'Calendar', 'Activities', and 'Territory Management'. Below this, there are sub-navigation links: 'Home Page', 'Hierarchies List', 'Territories List', 'Alignments List', and 'Territory Explorer'. The main content area is titled 'North Shore' and contains a form with the following fields:

- *Territory #: B101
- *Territory Name: North Shore
- *Hierarchy: Hierarchy 1
- *Division: SIA LS Division
- Description: Territory
- Comments: North Shore territory. Created on 1/01/2005
- *Created: 1/13/2005 12:18:05 PM
- Created By: QADMIN
- Primary Position:

Below the form, there are tabs for 'Rules' and 'Audit Trail'. The 'Rules' tab is active, showing a table of rules. The table has columns for 'Postal Code', 'City', 'State', 'Assign Contacts', 'Assign Accounts', 'Assign Assets', 'Effective Start Date', 'Effective End Date', and 'Comments'. The table contains one row with the following data:

Postal Code	City	State	Assign Contacts	Assign Accounts	Assign Assets	Effective Start Date	Effective End Date	Comments
19142	Philadelphia	PA	✓	✓	✓	1/1/2005 12:00:00 A		

Figure 11. Territory B101 After Minor Alignment

On March 1st, 2005, the company wants to run a major refresh for their sales force. For territory B101, they want to assign only contacts in postal code 19142. To accomplish this, they first run a minor alignment to drop all indirect rules, [Figure 12 on page 49](#). (Alternatively, for only a few rules, they could have manually set the rules to expire; but, for multiple rules on multiple territories, it is better to expire using an alignment. This way, the company keeps record of the rules and territories expired.)

Then, they run a major alignment to create fresh rules which are effective on March 1st, [Figure 13 on page 49](#).

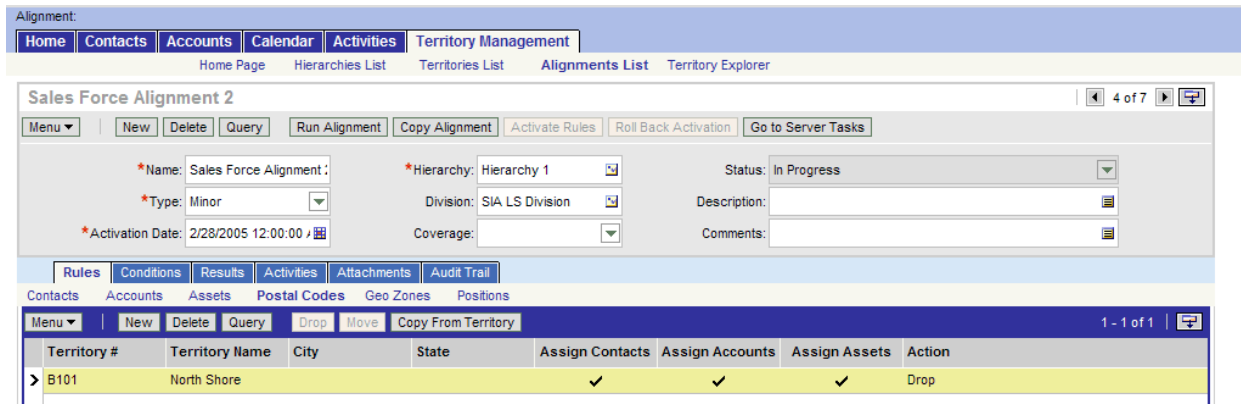


Figure 12. Minor Alignment to Expire Existing Rules

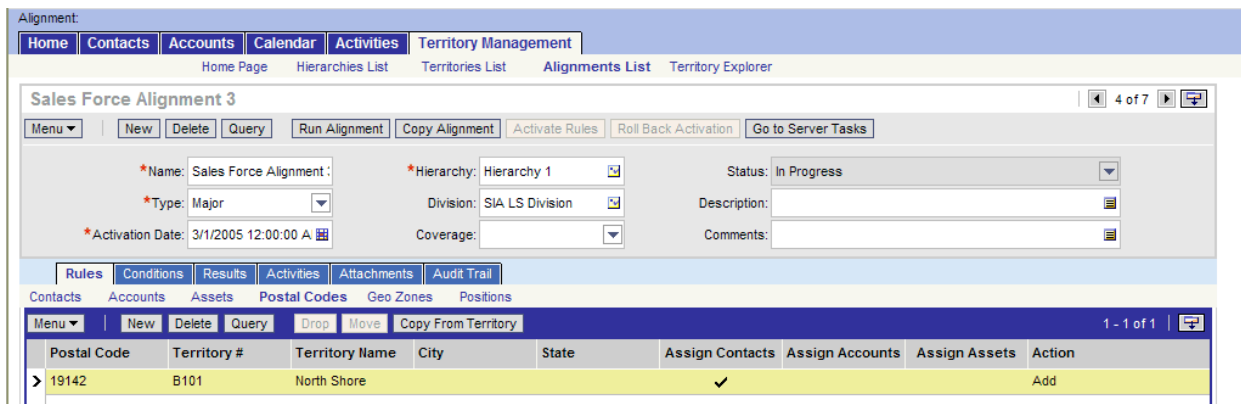


Figure 13. Major Alignment to Create New Rules

Figure 14 on page 50 shows the result of the two previous alignments. The old rule has expired and the new contacts-only rule is effective as of March 1st.

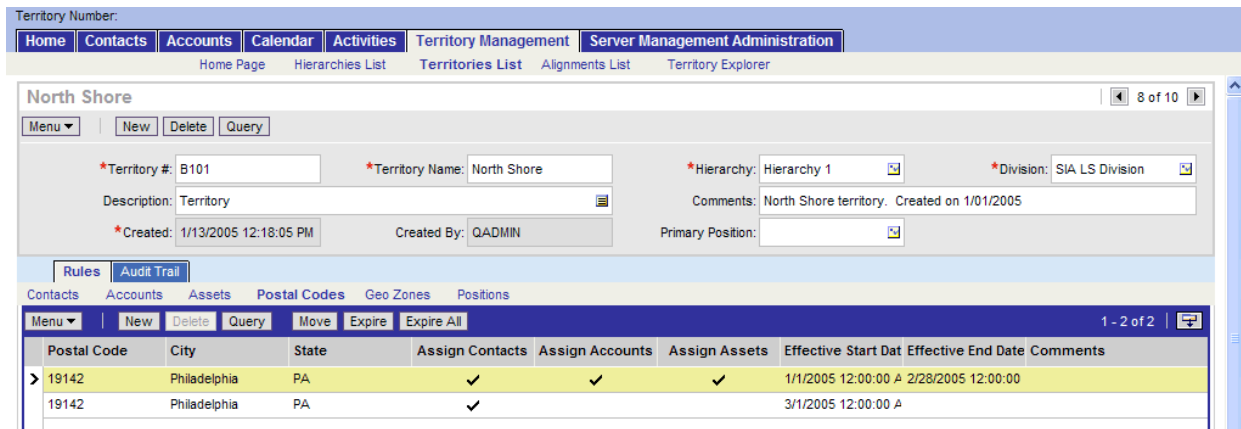


Figure 14. Territory B101, Final Status

About the Special Behavior for Position-Specific Contact Data in Life Sciences

In Siebel Life Sciences, the contact record displays some position-specific data including rep specialty, last call date, and primary address. This position-specific data is stored in the position-contact table, S_POSTN_CON.

When a new position is added to a contact team during an alignment, the most recent data (for rep specialty, last call date, and primary address) is copied from a position in the same hierarchy and division to the new position's row in the position-contact table. The effects of this copy action are:

- When a representative who is newly assigned to contact team looks at the contact record, he or she sees the last call date field populated with the date of the last call made by a representative in the same hierarchy and division.
- When the original representative is removed from a contact team and replaced by another, the rep specialty, last call date and primary address is not lost but is transferred.

NOTE: If multiple positions in the same hierarchy and division belong to the team, the data copied is from most recently updated row in the position-contact table.

Scenario for Activating and Maintaining Territory Alignments

This scenario provides an example of how alignment is rolled out to a sales force by the territory administrator and her team. Your company may follow a different process according to its business requirements.

A pharmaceutical company has run and optimized its territory alignments for its neurology sales force. The results of this major alignment have been reviewed, and the rollout of the assignments needs to take place at the beginning of the quarter, July 1st.

The time line for the rollout is as follows:

- **June 15.** The administrator sends email to all sales representatives in the neurology sales force to inform them of the rollout and to let them know that they will not be able to synchronize their laptops with the company's database on June 29th and 30th.
- **June 25.** The administrator sets the activation date for the alignment to June 29th, and she activates the alignment.
- **June 26.** The administrator confirms that the status of the alignment is scheduled and that the alignment has completed running.
- **June 27.** A sales manager calls and tells the administrator that one of the neurologists who had been assigned to territory B100 using a direct rule has just retired and so this rule should be deleted. To make this minor change, the administrator deletes the rule in the territory itself. This deletion allows the administrator to avoid having to cancel and reactivate the alignment. The administrator also deletes the rule in the alignment list so that the rules in the alignment record match what is actually rolled out on July 1st.
- **June 28.** At the end of the day, the administrator shuts down the Siebel Remote server so that the sales representatives no longer have access to the company's database.
- **June 29.** Territory alignment takes place. Positions in the contact and account teams are added and dropped accordingly.
- **June 30.** The administrator checks that the status for the alignment is active and that the rollout of the alignment is complete.

Company policy is to have sales representatives report to the sales manager responsible for their territories. Some sales representatives have changed territories in this major alignment, so the administrator adjusts the reporting structure so that these representatives are reporting to the correct managers.

- **July 1.** Early in the day, the administrator starts the Siebel Remote server so that the sales representatives can synchronize their laptops, downloading their new account and contact records.

The time line for the maintenance as follows:

- **July 2.** Sales representatives make changes and additions to account and contact records daily. To make sure that territory alignment keeps up with these changes, the administrator asks the Assignment Manager administrator to set up a weekly batch run that applies the alignment rules to the database, keeping position assignments current.
- **August 1.** The administrator is told that some territories in the hierarchy need to be inactivated as of September 30th. He prepares two minor alignments, both based on the current alignment. The first alignment drops the rules from the territories that are going to be removed from the hierarchy. The second alignment provides an adjustment in the current assignments to compensate for the loss of some territories from the hierarchy.
- **September 29.** The first minor alignment is run to expire rules from the territories are about to be dropped from the hierarchy.

- **September 30.** Some territories in the hierarchy are expired and then the second minor alignment is run to adjust the current assignments for a hierarchy with fewer territories.

Process of Activating and Maintaining Territory Alignments

To schedule and activate an alignment for a sales hierarchy or sales force, perform the following tasks:

- 1 [“Activating Territory Alignments” on page 52](#)
- 2 [“Rolling Back Major Territory Alignment Activations” on page 53](#). Only perform this task if you make a mistake and need to cancel a scheduled territory activation.
- 3 [“\(Optional\) Generating Reporting Structures Based on Territory Hierarchy” on page 55](#)
- 4 [“Using Assignment Manager to Maintain Territory Alignments” on page 57](#)
- 5 [“Viewing and Editing Rules for Individual Territories” on page 55](#)
- 6 [“Removing Territory Nodes from Hierarchies” on page 59](#)

Activating Territory Alignments

After you successfully run and review your alignment (as described in [Chapter 4, “Running Territory Alignments”](#)), you are ready to activate the alignment so the assignment of positions to account, contact, asset records or a combination thereof takes effect in your database.

CAUTION: If you have changed the alignment type (from major to minor, or from minor to major), make sure to rerun the alignment before activating it.

This task is a step in the [“Process of Activating and Maintaining Territory Alignments” on page 52](#).

To activate a territory alignment

- 1 Decide the date that you want your alignment to take effect (become active).
- 2 Review the dates on the territory nodes to make sure that all the territories that you want to assign have active nodes:
 - a Navigate to the Territory Management screen > Hierarchies List view.
 - b Drill down on the hierarchy record.
 - c In the Territory Nodes list, review the Effective Start Date and Effective End Date for each territory.
- 3 Navigate to Territory Management screen > Alignments List view.
- 4 Enter or confirm the activation date.
- 5 Click Activate Rules.

- Refresh the screen to monitor the status as the alignment is activated.

If the Activation Is Successful and the Activation Date Is...	The Final Status Is...
Future	Scheduled (On the activation date, "the alignment takes effect" and the alignment status changes to active)
Past	Active

For more information about status values, see [Table 5 on page 33](#).

- When the status is Active, click Go to Server Tasks to view the status of the job submitted to the Assignment Manager.

When the server task is over, you can review the Team field for selected contacts, accounts, or assets to confirm that the alignment has been effected.

NOTE: If the status is Alignment Activation Failed, the alignment cannot be rerun or reactivated. You need to copy the alignment, fix the problem, and then run and activate the copied alignment.

Rolling Back Major Territory Alignment Activations

About Roll Back

If a major alignment activation is scheduled for a date in the future, you can cancel the activation any time before the activation date. Canceling the activation rolls back the territory rules you set up when you scheduled the alignment activation and cancels the scheduled Assignment Manager job.

NOTE: If a rule activation is active, the alignment has already taken effect and you cannot roll back.

When a major alignment is rolled back, territory rules are restored mostly to their previous state. The exception is that end dates on existing rules are lost upon roll back.

What Happens During Roll Back?

For active territory nodes in the hierarchy, roll back:

- Deletes rules where the start date (and time) match the activation date (the rule must also be present in the alignment)
- Deletes the end date from rules where the end date matches the activation date.

NOTE: Rules that are added manually or edited manually (for example if the start date is changed) are not rolled back.

Activating and Maintaining Territory Alignments ■ Rolling Back Major Territory Alignment Activations

Figure 15 on page 54 illustrates roll back behavior, using direct contact rules as the example.

December 14: Territory A101 before the new alignment is scheduled

Rules Audit Trail				
Contacts Accounts Assets Postal Codes Geo Zones Positions				
Menu New Delete Query Move Expire Expire All				
Last Name	First Name	Effective Start Date	Effective End Date	Comments
> Porter	Susan	10/1/2004 12:00:00 AM	3/31/2005 12:00:00 AM	

December 15: New major alignment created with activation date January 1

*Activation Date: 1/1/2005 12:00:00 AM Coverage: Comments:				
Rules Conditions Results Activities Attachments Audit Trail				
Contacts Accounts Assets Postal Codes Geo Zones Positions				
Menu New Delete Query Drop Move Copy From Territory				
Last Name	First Name	Territory #	Territory Name	Action
> Kim	Jonathan	A101	San Mateo	Add

December 16: Territory A101 after the new alignment is scheduled

Rules Audit Trail				
Contacts Accounts Assets Postal Codes Geo Zones Positions				
Menu New Delete Query Move Expire Expire All				
Last Name	First Name	Effective Start Date	Effective End Date	Comments
Porter	Susan	10/1/2004 12:00:00 AM	1/1/2005 12:00:00 AM	Pre-existing rule, expired by scheduled alignment
> Kim	Jonathan	1/1/2005 12:00:00 AM		Rule added by scheduled alignment

December 17: Territory A101 after roll back

Rules Audit Trail				
Contacts Accounts Assets Postal Codes Geo Zones Positions				
Menu New Delete Query Move Expire Expire All				
Last Name	First Name	Effective Start Date	Effective End Date	Comments
> Porter	Susan	10/1/2004 12:00:00 AM		Pre-existing rule, end date deleted in roll back

Figure 15. Roll Back Illustration

Procedure

This task is a step in the "Process of Activating and Maintaining Territory Alignments" on page 52.

To roll back a scheduled territory alignment activation

- 1 Navigate to Territory Management screen > Alignments List view.
- 2 Select an alignment record where the status is Scheduled.
- 3 Click Roll Back Activation.

(Optional) Generating Reporting Structures Based on Territory Hierarchy

This procedure is optional. Only perform it if you want to change the parent positions for the positions belonging to the divisions in the hierarchy. This option may or may not be the right course of action for your organization's needs. Typically, you would use it if you want your management structure to parallel the territory hierarchy.

Although this procedure can be performed any time after your hierarchy has been set up, typically you choose to perform it just before or just after an alignment becomes active. For example, you might generate reporting structures based on territory hierarchy immediately after the activation of a major alignment is completed and before employees log back into the application to review their new assignments.

For the primary position for each territory, the application sets the parent-position field to the primary position of the parent territory.

TIP: To view the primary position of a territory: navigate to Territory Management screen > Territories List. If the Primary Position field is not visible in the form applet, you need to use Siebel Tools to expose the Primary Position field in the Territory Mgmt Territory business component on the Territory Form Applet.

This task is a step in the ["Process of Activating and Maintaining Territory Alignments"](#) on page 52.

NOTE: You can also update the reporting structure for selected territory nodes by using the Update Reporting Hierarchy button on the Hierarchies List > Territory Nodes view.

To generate a reporting structure based on territory hierarchy

- 1 Navigate to the Territory Management screen > Territory Explorer view.
- 2 In the hierarchy pane, select a hierarchy.
The Generate Reporting Hierarchy button becomes visible.
- 3 In the Territory Nodes list, click Generate Reporting Hierarchy.

Viewing and Editing Rules for Individual Territories

After a territory alignment has been scheduled or activated for the first time for a hierarchy, the Rules list is populated for individual territories, according to the rules set up in the Alignments view.

These territory records contain the (master) rules that are used by Assignment Manager to make changes to the database. When the alignment is rolled out or when the Assignment Rule Group is rerun for maintenance ([“Using Assignment Manager to Maintain Territory Alignments” on page 57](#)), Assignment Manager reads and applies these rules.

This Rules list for individual territories can be used to:

- View the current rules for a territory
- View the expired rules for a territory (This provides a history of the territory.)
- Make changes to rules for a territory

If you do make changes to rules for individual territories, remember that these changes are not reflected in the alignment record. If you do need to make a change to a territory rule, it is good practice to similarly update the alignment. To do this, you need to copy the original alignment, update the rules, and then rerun the alignment so that you have an alignment whose results are the same as what is rolled out to the sales force.

This task is a step in the [“Process of Activating and Maintaining Territory Alignments” on page 52](#).

To view or edit rules for individual territories

- 1 Navigate to the Territory Management screen > Territories List view.
- 2 Drill down on the territory record.

- 3 Depending on the type of rule you want to view or edit, click one of the links in the lower link bar: Contacts, Accounts, Assets, Postal Codes, or Geo Zones.

CAUTION: You should only make edits for objects where rules already exist. For example, if there are already contact rules in an alignment, you can add another contact rule to a territory and the rule will be applied. However, if there are no contact rules for the alignment, you can add the rule, but it does not take effect because no assignment rule group has been created for contacts for that alignment.

Some buttons are described in the following table.

Button	Comments
Move	<p>Use this button to move rules from the current territory to another territory. You are prompted for an expiration date (the day you want the rules to move) and the territory you want the rules to move to. The Move button behaves in the following ways:</p> <ul style="list-style-type: none"> ■ Expired rules (and rules set to expire before the move date) are not moved. ■ Rules that are current on the move date are set to: <ul style="list-style-type: none"> ■ Expire on the move date for the current territory ■ Start on the move date for the destination territory ■ Rules that start in the future are: <ul style="list-style-type: none"> ■ Deleted from the current territory ■ Moved to the destination territory
Expire	Use this button to set the effective end date for selected records.
Expire All	Use this button to set the end date for all records in the list.

NOTE: You cannot view conditions that have been created for the territory, except through the Assignment Manager user interface.

Using Assignment Manager to Maintain Territory Alignments

In day-to-day operations, contact, account, and asset records are added, deleted, and changed. You want to make sure that as changes are made to these records, your territory alignment is updated accordingly.

For example, when a new account is added, when a contact’s primary specialty changes, or when an asset is moved to a new address, you want to have the sales team or owner for the record updated automatically and within a short period of time.

To maintain alignment, you set up Assignment Manager to run the alignment rules in batch mode at regular intervals, for example, once a week.

Before you can set up the batch assignment run, you need to determine the rule group ID for the activated alignment. This ID is stored in the S_TERRASGN_INFO table and is uniquely determined for each combination of division, hierarchy, and assignment object.

After you have determined the rule group ID, you can set up the batch assignment run. You need one batch job for each type of assignment object. For example, if your alignment includes both contacts and accounts, create two batch jobs: one for contacts and one for accounts.

This task is a step in the ["Process of Activating and Maintaining Territory Alignments"](#) on page 52.

To set up Assignment Manager run a territory alignment's rule group in batch mode

- 1 Perform a direct SQL query in the database to determine the rule group ID for your division, hierarchy, and assignment objects:

```
select ASGN_RULE_GRP_ID from S_TERRASGN_INFO where DIVISION_ID = 'Division ID' AND
TERR_HIER_ID = 'Hierarchy ID' AND ASGN_OBJECT_CD = 'Assignment Object'
```

Where:

- *Division ID* is the row number of the division record.
 - NOTE:** If you are aligning the whole hierarchy and no division is specified, then query for where *DIVISION_ID IS NULL*.
- *Hierarchy ID* is the row number of the hierarchy record.
- *Assignment Object* is TM Account, TM Contact, or TM Asset.

```
For example: select ASGN_RULE_GRP_ID from S_TERRASGN_INFO where DIVISION_ID = '88-
21NSV' AND TERR_HIER_ID = '88-21NRZ' AND ASGN_OBJECT_CD = 'TM Contact'
```

- 2 Follow the instructions for running Assignment Manager in batch mode that are given in the *Siebel Assignment Manager Administration Guide*.

In this case, suggested values for job parameters are shown in the following table.

Name	Value	Example
Assignment Key	<Assignment Rule Group Id>	88-23X9X
Assignment Object Name	TM Account, TM Contact, or TM Asset	TM Account
Dynamic Candidate Parameters	ActivationDt: ' <i>current date</i> ' ¹	ActivationDt: '06/15/05 01:00:00 AM'
Copy Candidate Specific Data	Yes	Yes
Use Key Value	Rule Group	Rule Group

1. Assignment rules that are active on this date are applied.

Removing Territory Nodes from Hierarchies

Only active territory nodes are considered in territory alignments. Because of this, you need to exercise care in how you set nodes to expire; you need to make sure that the rules associated with expired nodes also expire as planned.

Example

Consider the case where a territory, say T3, contains rules with effective end dates of December 31st and where you set the end date for the node to be September 30th. Because T3 is removed from the hierarchy on September 30th, the rules associated with the hierarchy are ignored after September 30th. This means that the rules are not dropped after December 31st and any assignments made by those rules persist after December 31st (no matter how many times the alignment for the hierarchy is activated—as long as T3 remains inactive).

To avoid this type of problem, before removing nodes from a hierarchy, you should explicitly expire the associated rules, as outlined in the procedure below.

Procedure

This task is a step in the [“Process of Activating and Maintaining Territory Alignments”](#) on page 52.

To remove territory nodes from a hierarchy and expire the associated rules

- 1** Identify the nodes that you want to remove from the hierarchy.
- 2** Create, run, and activate a minor alignment for the hierarchy in order to drop rules from the territories that you no longer want:
 - a** Copy the current alignment.
 - b** For each node you want to remove, change the add rules to drop rules.
 - c** Run the alignment.
 - d** Activate the alignment.

(Using the dates of the example, this alignment would be scheduled to run early in the day on September 30th.)

This has the effect of expiring all rules in the territories that you want to remove.

- 3** Edit the Effective End Date for the nodes that you want to remove from the hierarchy.
- 4** Create, run, and activate a new alignment for the hierarchy.

This alignment is the alignment you want, without reference to the territory nodes identified in [Step 1](#).

(Using the dates of the example, this alignment would be scheduled to run late in the day on September 30th.)

6

Using EIM with Territory Management

This chapter covers information about using Siebel Enterprise Integration Manager (EIM) to load Territory Management data into your Siebel database. It includes the following topics:

- [“About Using EIM for Territory Management” on page 61](#)
- [“Which Territory Management Records to Bulk Load?” on page 61](#)
- [“Loading Territory Management Data into the Siebel Database” on page 62](#)

About Using EIM for Territory Management

The tasks described in the preceding chapters of this book describe how to set up territories, territory hierarchies, and rules directly in the Siebel user interface. This approach works well on the small scale: for example, when you are working in a test environment. However, in a production environment and even for large-scale tests, EIM is a preferred way to enter data.

Which Territory Management Records to Bulk Load?

[Table 9](#) lists the types records that you are most likely to want to bulk load for Territory Management.

Table 9. Types of Territory Management Records Suitable for EIM Loading

Record Type	Where Found on Territory Management Screen
Territories	Territories List view
Territory nodes	Hierarchies List > Territory Nodes view
Rules	Alignments List > Rules > Accounts, Contacts, Assets, Postal Codes, and Geo Zones views
Conditions	Alignments List > Conditions view

Loading Territory Management Data into the Siebel Database

Use Siebel EIM to load Territory Management data into the Siebel database. For general information about using Siebel EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

Use the following EIM tables to load data from your external source into the Territory Management application (base) tables:

- EIM_TERR_HIER
- EIM_TERRITORY
- EIM_TERRALGN
- EIM_TERRALGN_D
- EIM_ALGNPOSCON
- EIM_ALGNPOSAST
- EIM_ALGNPOSACC

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