

**Oracle® Territory Manager**

User Guide

Release 12

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Oracle Territory Manager User Guide, Release 12

Part No. B25173-02

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### Part No. B25173-02

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# Preface

## Intended Audience

Welcome to Release 12 of the *Oracle Territory Manager User Guide*.

This guide is intended for sales administrators, sales managers, and territory administrators.

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

- The principles and customary practices of your business area
- The Oracle Territory Manager application
- Oracle Application Framework Applications
- The Oracle Applications graphical user interface

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

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

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## Structure

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- 2 Oracle Territory Manager Business User Flows**
- 3 Administering Sales Territories**
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## Related Information Sources

### *Oracle Sales Implementation Guide*

Use this guide to implement your Sales application. It explains how to set up the territory assignment for sales objects.

### *Oracle TeleSales Implementation Guide*

Use this guide to implement your TeleSales application. It explains how to set up the territory assignment for sales objects.

### *Oracle Territory Manager Implementation Guide*

This guide covers the steps needed to implement Oracle Territory Manager.

## Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

## 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.



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# Introduction to Oracle Territory Manager

This chapter covers the following topics:

- Overview of Oracle Territory Manager
- Oracle Territory Manager Features
- Oracle Territory Manager Integrations
- Common Concepts
- Multi-Organization Access Control
- Enabling Matching Attributes
- Creating Territory Types

## 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.

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

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

Additional information on concurrent programs for sales is in the "Setting Up and Using Territory Assignment Program (TAP)" section of either the *Oracle Sales Implementation Guide* or the *Oracle TeleSales Implementation Guide*.

## Components

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

- **Territory Types: Required.** Territory Types are the building blocks for all territories. A type is blueprint for territories, defined by a specific set of transaction types and corresponding matching attributes.
- **Self Service Named Accounts: Optional.** Sales administrators use the seeded named account territory type to create named account territories. Sales managers then assign their named accounts to individual sales representatives. Sales managers use the alignment tool to create different territory assignment models and compare them.
- **Self Service Geographic Territories: Optional.** Sales administrators create a self-service geographic type to create geographic territories and assign them to sales managers. Sales managers can then allocate their geographic region to their directs.
- **Concurrent programs enable territory definitions.**
- **A stand-alone sales team search is available to any user.**

## Sales Territories

Sales organizations use territories to automatically assign prospects to salespeople.

An example of a sales territory is: High-tech companies within a specific geographic area. This territory is defined using the following matching attributes:

- Account Classification = High Tech
- State = California

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

## 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.

Upper levels of sales management identify a set of named accounts and associate them to a sales division. 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 have finalized an alignment they can activate it, making it the one of record.

At the end of the alignment process, you can manually enter named account quotas 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.

### **Non-Sales Territories**

The following Oracle modules can use Oracle Territory Manager to assign business objects to resources:

- Oracle Collections
- Oracle Partner Manager
- Oracle Field Service
- Oracle Service Contracts

- Oracle Trade Management

### **Example**

In Oracle Field Service, all high urgency service requests for internal IT support should go to the senior IT support person, John Gray. A territory is defined, with John Gray as the resource, using the following matching attributes for service requests:

- Request Type = Internal: IT
- Request Severity = High1
- Request Status = Open
- Request Urgency = Immediate

## **Oracle Territory Manager Features**

Oracle Territory Manager includes the following features:

- Over 100 matching attributes through which to define territory rules
- Territory Types for ease of territory creation for any usage (such as Oracle Sales or Oracle Service)
- Assignment to individual resources, groups, or teams
- Named account support
- Self-service distribution of named accounts
- Named account alignments with visual comparison of what-if territories
- Export to spreadsheet for ease of territory maintenance
- Self-service distribution of geographic territories
- Configurable territory exception handling through Oracle Workflow
- Ability to create custom matching attributes through a public API

## **Oracle Territory Manager Integrations**

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

- **Oracle TeleSales and Oracle Sales:** accounts, leads, and opportunities are assigned to sales agents based on territory definitions. Territory alignment uses past

opportunity data in calculating metrics.

- **Oracle Incentive Compensation:** uses the sales set up for accounts.
- **Oracle Service:** incoming service requests or tasks are routed to appropriate resources.
- **Assignment Manager in Oracle Common Application Calendar:** retrieves qualified resources identified in territories.
- **Oracle Trade Management:** offers and claims are assigned to qualified resources.
- **Oracle Collections:** delinquencies are assigned to the correct collections agents.
- **Oracle Partner Management:** Partners are assigned to qualified resources.

Oracle Territory Manager depends upon the following modules:

- **Oracle Resource Manager:** resources are defined and can then be assigned to territories.
- **Oracle Workflow:** objects that end up in the catch all territory can start a workflow.
- **Oracle Trading Community Architecture:** TCA provides customer information, customer hierarchy information, DUNS number, DNB annual revenue, and DNB number of employees.
- **Oracle WebADI:** The application uses Web ADI to export and import territory definitions to and from Microsoft Excel.

## Common Concepts

### Usages

A usage is an Oracle Applications module that uses Oracle Territory Manager to assign resources. Following are the available usages:

- Collections
- Partner Management
- Sales
- Service
- Service Contracts

- Trade Management

## Matching Attributes

Matching attributes are criteria used to identify territories. A matching attribute consists of three components: name, operator, and value. The following table describes each component:

### *Matching Attribute Components*

<b>Components</b>	<b>Description</b>
Name	The name of the matching attribute. It can be postal code, item, task priority, request status, job title, or others.
Operator	Use the operator to connect a matching attribute name and its values to make an attribute meaningful. The operator's list of values (LOV) depends on the data type of the matching attribute. Operators are Is Equal To, Contains, and Is Between. The default value for this field is "is equal to". You can use the Is Between operator for less than or greater than. For example, Is Between 0 and 5000000 or Is Between 5000000 and 9999999999.
Value	The selection from the LOV in this field is based on the selected matching attribute. For example, the LOV for the request status matching attribute can be Open or Closed. If the matching attribute is area code, then manually enter this field, for example, 408, 415, and so on.

## Transaction Matching Attributes

Transaction matching attributes 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 matching attributes which are grouped by transaction type. For example, a sales

territory has five predefined transaction types: account, lead, quote, proposal, and opportunity. Some examples of transaction matching attributes within the Account Transaction Type are company name, area code, and postal code. Opportunity channel is one transaction matching attribute for the Opportunity Transaction Type.

**Note:** You must enable transaction matching attributes before using them.

### **Sample List of Seeded Transaction Matching Attributes**

Territory Manager includes seeded matching attributes for the following modules:

- Oracle Sales and Oracle TeleSales
- Oracle Field Service
- Oracle Trade Management
- Oracle Service Contracts
- Oracle Collections
- Oracle Partner Management

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

- Customer Name

This transaction matching attribute defines a customer name.

- Customer Name Range

In contrast to a Customer Name matching attribute, a Customer Name Range matching attribute is used to indicate more than one customer (or customer names) by entering appropriate values. This matching attribute 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 matching attribute 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.

- Customer Name Range Group

Instead of entering the Customer Name Range values every time when defining a territory, you can use the Customer Name Range Group matching attribute to group these frequently used values together and give them a group name, for example, Business World. This matching attribute was developed so that businesses can conveniently group together all names of a company including its subsidiaries.

#### **Example**

Create a Customer Name Range Group matching attribute called "Business World" with a grouping of the following values that you used for Customer Name Range:

- Like "Business World %"
- Between "A% Business World" to "Z% Business World"

In this way, you can use "Business World" as the Customer Name Range Group matching attribute to list all Business World related branches and subsidiaries in one step when you define a territory.

## **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 matching attributes and values of the parent territory. Also, additional matching attributes 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 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 1 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, 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, 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 1, 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: Territory 1 and Territory 3 have the highest rank. 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.

## Territory Types

Territory administrators create territory types based on transaction types and corresponding matching attributes. The territory types form the basis for creating territories.

## Multi-Organization Access Control

Your Oracle Applications may be set up with more than one operating unit, or organization. For example, you have separate operating units for the United States and Europe. The enterprise information for each operating unit is kept separate. One territory administrator, however, can be responsible for both operating units and can work with territory information in each without needing to log out of one operating unit and log into the other operating unit.

Users who have access to more than one operating unit need to select the operating unit they want to work in on applicable screens.

### Example

For example, a territory administrator selects the United States operating unit and reviews the available service territories, then selects the Europe operating unit and reviews the available service territories for Europe and creates an additional territory for Europe.

## Enabling Matching Attributes

Matching attributes are seeded criteria used to identify territories. For example, country is a geographic matching attribute. Oracle Territory Manager has seeded matching attributes for the following usages and transaction types:

- Collections: customer
- Partner Management: partner
- Sales and TeleSales: account, lead, opportunity, proposal, quote
- Service: service request, service request and task, task
- Service Contracts: contract renewal
- Trade Management: claim, offer

In addition, you can create your own custom matching attribute through a public API. Before you can assign a matching attribute to a territory type, you need to enable it.

**Role:** Territory Manager Application Administrator

## Restrictions

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.

You cannot disable a matching attribute that is part of a territory type definition.

## Creating Territory Types

A territory type must be created and enabled for a usage, such as Collections, before territories can be created for that usage. A type already exists for named accounts for the Sales usage.

If you have access to multiple organizations, or operating units, then you can create territory types for each organization.

Only enabled attributes can be added to a territory type.

### Example

For example, your company is set up with two operating units, United States and Europe. You have been assigned the territory administrator roles for all usages. You create the following territory type:

- Organization: United States
- Usage: Service

- Territory Type Name: Service Request Assignment
- Transaction: Service Request
- Attribute for Service Request Transaction: Request Severity
- Attribute for Service Request Transaction: Request Status

A territory type cannot be deleted if territories exist for that territory type.

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## Oracle Territory Manager Business User Flows

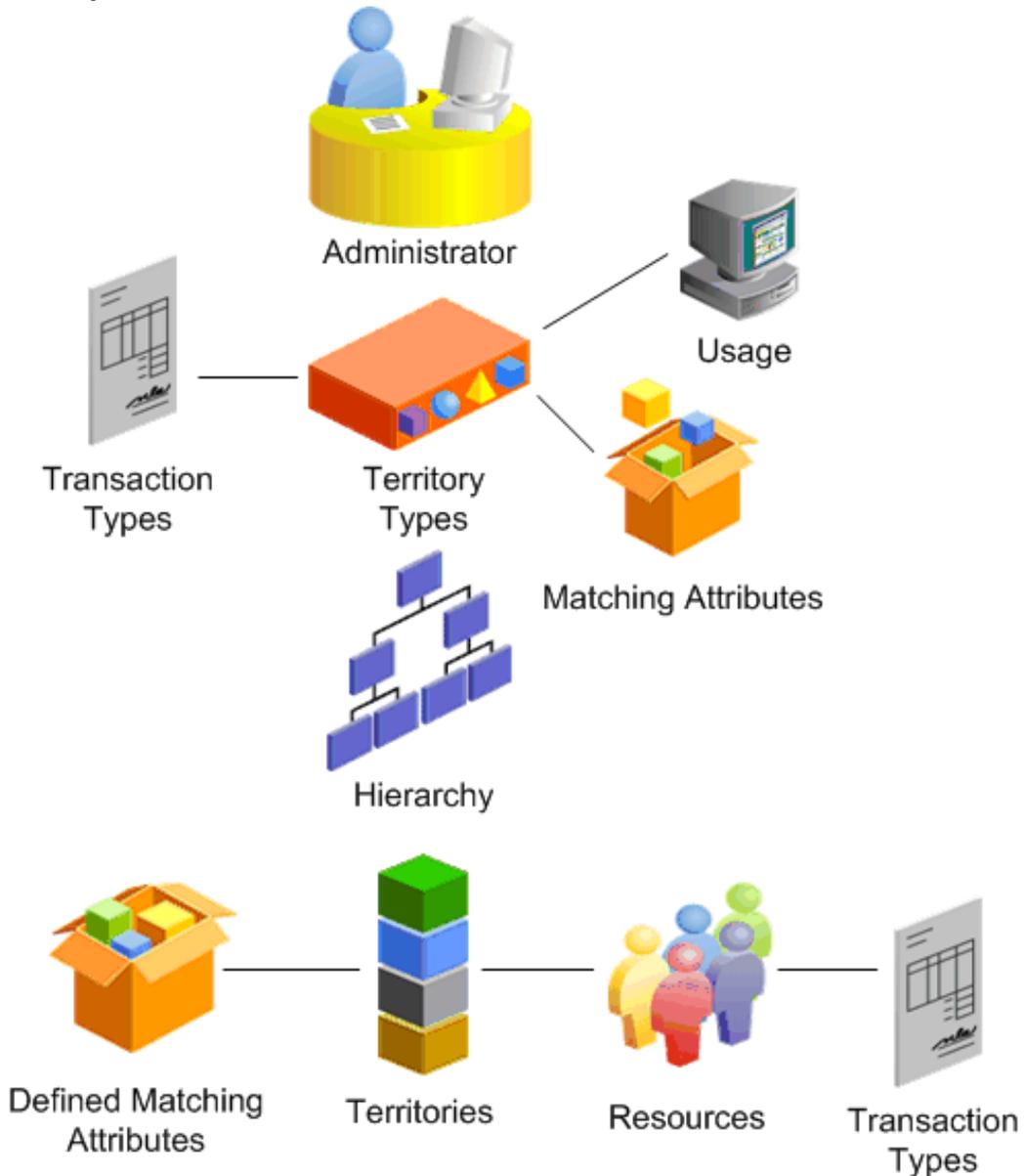
This chapter covers the following topics:

- Territory Administration Business Flow
- Sales Self-Service Business Flow

### **Territory Administration Business Flow**

This business flow applies to all usages. The territory administrator creates and updates territory definitions as needed.

### ***Territory Administration Business Flow***



#### **Steps:**

1. For each usage, such as Collections or Service, the administrator builds territory types to use when creating territories. Each territory type specifies the types of transactions it applies to, such as service requests or opportunities. Matching attributes are criteria used to identify territories. The administrator also specifies any matching attributes that are most likely to be used to create the territory. Matching attributes can be deleted or added during the final territory creation

process.

2. The administrator creates at least one hierarchy of territories for each usage. Each new territory created must have a parent territory. Territory types are required to create a new territory.
3. Territories have effectivity start and end dates. It is possible to create territories for future dates.
4. The administrator designates the resources for the new territory and specifies the access each resource has to the transactions.
5. The administrator enters values for the matching attributes to define the matching criteria.
6. A concurrent program is run to complete the territory definition.

## **Sales Self-Service Business Flow**

For the Sales usage, territory creation can be done in a self-service manner. Sales managers control their own territory definitions and assignments.

### Self-Service Territory Creation



### Steps:

1. The sales administrator creates a territory for an entire sales group and assigns it to the top-level manager of the sales group, such as the vice-president. Two types of territories can be created for self-service:
  - **Geographic**: The administrator creates a territory type that includes geography and defines a geographic area, for example, California.
  - **Named Accounts**: A territory type exists for named account territories. Sales management determines what customers should be designated as named

accounts and how they should be grouped into territories. The administrator creates a territory for all or a large group of named accounts that belong to a sales group.

The sales administrator can take no further action with a geographic self-service territory after it is created and assigned to the top manager.

2. The top sales manager breaks up the territory into smaller geographies or groups of named accounts and creates child territories assigned to the next level of managers.
3. The next level of sales managers split up their assigned territories and assign them in turn to their direct reports.
4. Managers update their sales team information and territory definitions as needed.



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## Administering Sales Territories

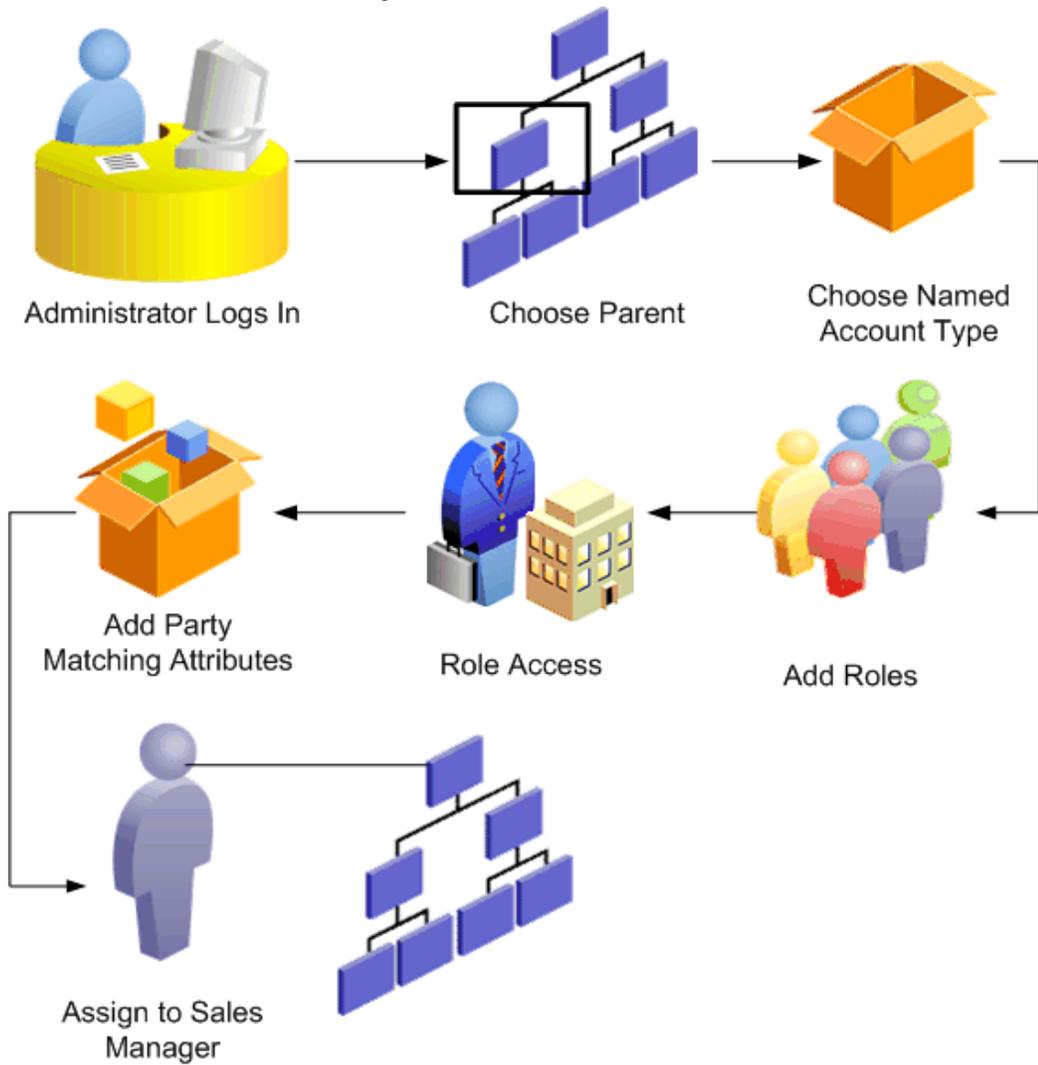
This chapter covers the following topics:

- Named Account Creation Flow
- Adding Named Accounts
- Mapping Customer Name and Postal Code Matching Attribute
- Named Account Spreadsheet
- Monitoring the Named Account Setup Process
- Sales (Non-Named Account) Creation Flow
- Non-Named Account Territory Spreadsheet

### Named Account Creation Flow

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

### Create a Named Account Territory



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

### Prerequisites

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

### Steps:

1. Navigate to Territories.  
Select a parent territory and click **Create**.

2. Select the Named Account territory type.
3. Enter a name for the territory and other details. The number of winners is inherited from the parent. The default start is today and the end date is a year from today. You can enter future dates for planning purposes or to prepare territories ahead of time, such as prior to the start of the fiscal year. Named account territories are available for self-service distribution by managers to their sales teams.
4. Select one or more roles who will be assigned to this territory. For each role, you can specify access to each transaction type.

**Example**

For example, the sales manager role has full access to all transaction types. The TeleSales Agent role has full access to leads and accounts, view only access to opportunities, and no access to quotes and proposals.

5. Select the party matching attribute criteria to use for your name account territory. Following are your options.

**Party Matching Attributes**



Company Name + Postal Code



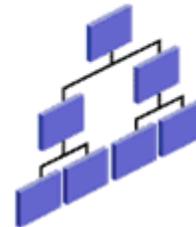
Registry ID from TCA



DUNS Number



Site Number



Party Hierarchy from TCA

- 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.
- 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.
- Select Site Number if you want to match by the identifier for a party location.

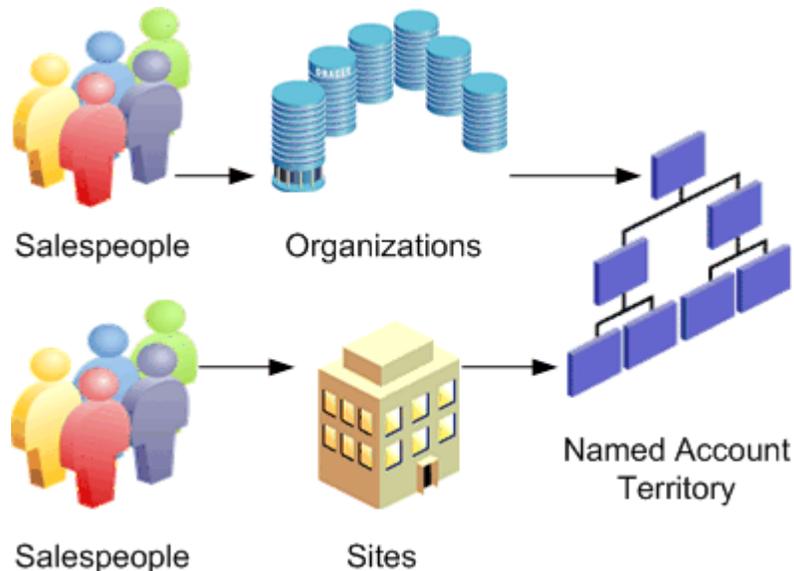
- Select Customer Name and Postal Code to capture a range of business names and postal codes. This choice will pick up the duplicate records in your database where users entered multiple instances of the same customer name.  
If you select Customer Name and Postal Code, then you can additionally choose the resource from the LOV to assign to a catch all territory and enter the name of a workflow for catch all transactions.
- Select any of the party hierarchy names that have been set up in Trading Community Architecture. The top of the hierarchy becomes the named account. All subsidiaries of the named account are dynamically assigned to the sales team for the named account, without the need to maintain each subsidiary as a separate named account. If the sales manager changes the sales team for the named account (top of the hierarchy), then all subsidiaries are affected by the change.

You can also define any additional matching attributes that were in the territory type used.

You can add any party-related matching attributes that have been enabled and define them.

6. Choose the name, group, and role for the top of the sales management hierarchy for this territory. That manager in turn can assign accounts to sales organizations or salespeople in his sales hierarchy.
7. At this point you can choose to wait to add named accounts later or do it now. Continue with the next step when you are ready to add named accounts.

**Add Named Accounts**



8. Enter search criteria to find the organizations you want to add to the territory and click **Export**.

**Note:** Make sure to close all instances of the Excel application on your computer before clicking Export.

If Identifying Addresses Only is selected, then only the primary address for each organization is included in the export. If it is deselected, then all site addresses are included and you can select a particular site to include it as a named account for the territory. In this way, you can assign different sites to different named account territories.

The organizations are exported to your Microsoft Excel spreadsheet.

9. Enter a territory name in the To Territory field. You can type in the name, copy and paste from another cell, or double-click to use the LOV.
10. 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. The application automatically assigns the owners of the territory as Salespeople for the named account.
11. In Excel, select **Upload** from the **Oracle** menu. Make sure you select Pre-Validate when uploading.

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

## 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.

You no longer have access to a self-service geographic territory after you create it. Only the assigned sales manager can modify it or add child territories to it.

## Adding Named Accounts

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

## Prerequisites

- Named account territories must exist
- You must use Microsoft Internet Explorer as your browser.
- Microsoft Excel must be closed before you click Export.

### Steps:

1. From the dashboard, click **Add Named Accounts**.
2. Enter your search criteria.
3. Click **Export**.  
The organizations appear in your spreadsheet.
4. Enter a territory name in the To Territory field. You can type in the name, copy and paste from another cell, or double-click to use the LOV.
5. 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. The application automatically assigns the owners of the territory as Salespeople for the named account.
6. In Excel, select **Upload** from the **Oracle** menu. Make sure you select Pre-Validate when uploading.

## Restrictions

The LOVs in the spreadsheet are not as restrictive as when you update information in the HTML user interface. 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.

When a salesperson assigned to a territory is removed from a sales group or role, you need to update the territory definition to the new group or role.

## Mapping Customer Name and Postal Code Matching Attribute

When named accounts are identified by party name and postal code, territory administrators map a range of customer keynames and postal codes to ensure that any records that fall within those rules are identified with a named account. This procedure is optional.

### Steps:

1. On the Territory Search page, select Named Account from the Type field.
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.
4. Enter a customer keyname. The keyname is the matching attribute 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 4.
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 6.
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 matching attribute rules.
  2. If conflicts appear, then tighten or loosen the named account matching attribute rules to avoid conflicts.
  3. Return to the definition page.
9. Click **Apply**.
10. If you want to preview what organizations match your matching attributes, then click **Mapped Organizations**. Return to the definition page.

### Restrictions

The concurrent program *Synchronize Territory Assignment Rules* must be run for your territory changes to be effective. After the concurrent program is run, leads, opportunities, or accounts that fall within the named account assignment rules you created will be assigned to the named account and the related territory.

## Named Account Spreadsheet

You can manage named account territories by exporting a territory to spreadsheet and then making your changes in the spreadsheet. Following are some of the changes you can make. Use the Oracle: Upload menu option to load your changes back to the database. (Be sure to have Pre-Validate selected when you upload.)

- To remove a named account from the territory, select Yes in the Delete From Territory column.
- To move a named account to a new territory, select or enter the territory name in the To Territory column. The current territory name is in the From Territory column.
- Add or delete salespeople for one or more named accounts. Be sure to include the name, group, and role for each salesperson. You can double-click to use the LOV to select a salesperson.

## Restrictions

When a salesperson assigned to a territory is removed from a sales group or role, you need to update the territory definition to the new group or role.

## Monitoring the Named Account Setup Process

Use this procedure to check the status of named accounts.

### Steps:

1. Select the Dashboard subtab.

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

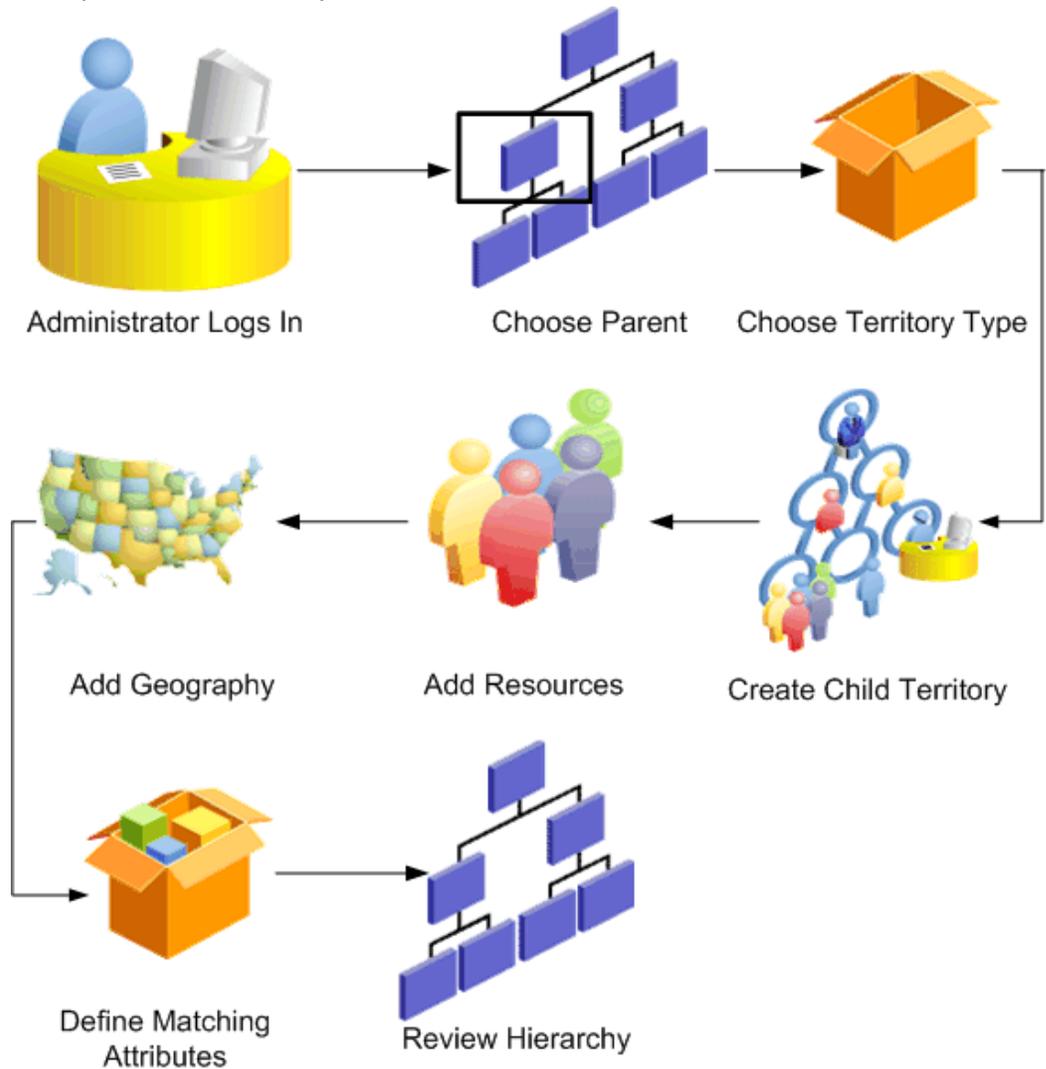
The *Named Account Post Processing* concurrent program refreshes the dashboard information.

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

## Sales (Non-Named Account) Creation Flow

Sales territory administrators create territories that are not named accounts, many of them based on geography. The following diagram shows the process flow.

### Sales (Non Named Account) Creation Flow



#### To create a territory:

1. The Sales Territory Administrator navigates to Territories.
2. If you have access to more than one operating unit, then select the operating unit.
3. Select the Sales usage if you are the administrator for more than one usage.
4. Search for the territory that will be the parent to the one you are creating. You can choose to view only territories active on a selected date. It is possible to create a territory hierarchy for a future date, such as for the next fiscal year. This prevents delays because you switch to the new hierarchy on the specified date. The resources

assigned must also be active for the specified future date.

5. Click **Go** to view the existing territories.
6. You can expand the hierarchies to obtain a thorough view of the existing hierarchy and determine where your new territory should be placed.
7. Select the parent territory.
8. Select the territory type. The application provides a geography territory type. Administrators can create additional territory types as needed.
9. Enter the territory name and other details. The number of winners is inherited from the parent unless you specify a number. The default effective dates start with today and end at a year from today. You can create territories that become active at a future date.

If you select Available to Self Service, then the sales manager you assign to the territory can in turn create child territories and assign sales resources to them. The administrator cannot then modify the child territories.

10. Select the resource type and resource. You can select an individual resource or a sales role. The resource start date defaults to the later date of either the territory start date or the resource start date in Resource Manager. The resource end date defaults to the earlier date of either the territory end date or the resource end date.

For a self-service territory, you must add both the sales manager role and an individual sales manager.

11. For each resource, define the access for the resource to each transaction type, such as Full Access or View Only.
12. If the territory type contained a geographic matching attribute, then you can define the values of each matching attribute, add others, or delete one or more matching attributes.

**Example**

For example, the territory type includes State. You can add State = California.

13. Enter the definition values for any other matching attributes included in the territory type.
14. Review the territory hierarchy and you will see your new territory.

You can review and edit or delete your new territory. It does not become active until the concurrent program is run.

## Non-Named Account Territory Spreadsheet

You can export territories to make changes and then upload them back to the application.

### Steps:

1. Click the Export icon next to the territory you want to export.
2. Choose whether you want to export the single territory, the territory plus its immediate children, or the territory including all of its children.
3. If the territory includes a geographic matching attribute, then you additionally can choose to export only the territory definition, only unassigned geographies, or both. If you selected to export geographies, select the geography type to export, such as postal codes or cities.
4. Make your changes in the spreadsheet. You can add territory definition information, add or change resources, and delete information. Your changes are validated when you upload back to the database.
5. When your changes are complete, go to the Oracle menu and choose **Upload**. Make sure you select Pre-Validate when uploading.

### Related Topics

Using Spreadsheet, page 6-1



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## Administering Non-Sales Territories

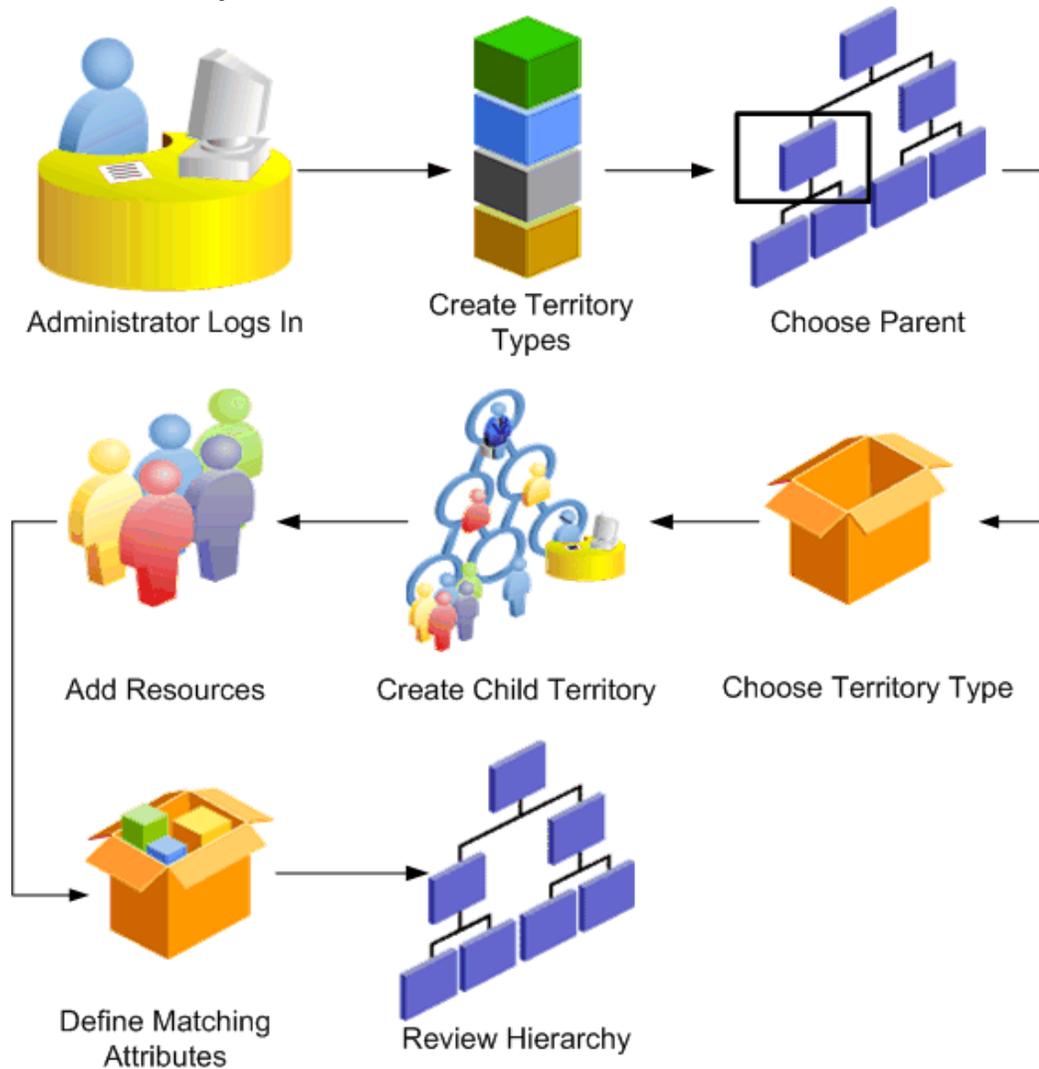
This chapter covers the following topics:

- Non-Sales Creation Flow
- Territory Spreadsheet

### Non-Sales Creation Flow

Territory administrators create and maintain territory definitions for non-sales usages. The following diagram shows the process flow.

### Non-Sales Territory Creation Flow



During the territory planning phase, planners decide what transactions to assign automatically to resources by using territories. They also decide what matching attributes will aid in the territory assignment. The administrator creates a territory type for each combination of transactions and transaction matching attributes that can be used as a basis to create numerous territories.

#### Example

For the Service usage, the administrator creates a territory type for the transaction type Service Request that includes matching attributes that will assign service requests to resources who deal with different products. Another territory type uses matching attributes that will assign resources based on severity of the service request and when it was first reported.

## Prerequisites

- A territory type must exist for the usage.
- The matching attributes you want to use must be enabled. This includes any custom matching attributes created by your system administrator.

### To create a territory:

1. The Territory Administrator navigates to Territories.
2. If you have access to more than one operating unit, then you can select the operating unit.
3. Select the usage if you are the administrator for more than one usage.
4. Search for the territory that will be the parent to the one you are creating. You can choose to view only territories active on a selected date. It is possible to create a territory hierarchy for a future date, such as for the next fiscal year. The resources assigned must also be active for the specified future date.
5. Click **Go** to view the existing territories.
6. You can expand the hierarchies to obtain a thorough view of the existing hierarchy and determine where your new territory should be placed.
7. Select the parent territory, and click **Create**.
8. Select the territory type.
9. Enter the territory name and other details. The number of winners is inherited from the parent unless you specify a number. The default effective dates start with today and end at a year from today. You can create territories that become active at a future date.
10. Select the resource type and resource. You can select an individual resource, a group, or a team. The resource start date defaults to the later date of either the territory start date or the resource start date in Resource Manager. The resource end date defaults to the earlier date of either the territory end date or the resource end date.
11. For each resource, define the access for the resource to each transaction type, such as Full Access or View Only.
12. If the territory type contained a geographic matching attribute, then you can define the values of each matching attribute, add others, or delete one or more matching

attributes.

**Example**

For example, if the territory type includes State, then you can add State = California.

13. Enter the definition values for any other matching attributes included in the territory type.
14. Review the territory hierarchy and you will see your new territory.

You can review and edit or delete your new territory. It does not become active until the concurrent program is run.

## Territory Spreadsheet

You can export territories to make changes and then upload them back to the application.

**Steps:**

1. Click the Export icon next to the territory you want to export.
2. Choose whether you want to export the single territory, the territory plus its immediate children, or the territory including all of its children.
3. If the territory includes a geographic matching attribute, then you additionally can choose to export only the territory definition, only unassigned geographies, or both. If you selected to export geographies, select the geography type to export, such as postal codes or cities.
4. Make your changes in the spreadsheet. You can add territory definition information, add or change resources, and delete information. Your changes are validated when you upload back to the database.
5. When your changes are complete, go to the Oracle menu and choose **Upload**. Make sure you select Pre-Validate when uploading.

## Restrictions

You can select any enabled matching attribute to add to a territory definition. However, if the selected attribute is not included in the selected territory type it will be rejected during the validation process when you upload your changes.

## Related Topics

Using Spreadsheet, page 6-1

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## Managing Territories (Sales Manager)

This chapter covers the following topics:

- Overview of Managing Sales Territories
- Viewing Your Named Accounts
- Searching for a Named Account
- Using Advanced Search
- Assigning the Sales Team to Named Accounts
- Exporting Named Accounts to Microsoft Excel
- Uploading Named Accounts from Spreadsheet
- Transferring Named Accounts
- Creating a Named Account Territory Alignment
- Assigning Named Accounts for an Alignment
- Comparing Alignments
- Activating a Territory Alignment
- Creating a Geographic Territory
- Reviewing Your Account Assignments

### Overview of Managing Sales Territories

Using self-service territory management, sales managers at the top of the sales hierarchy are assigned territories by territory administrators. The sales managers then distribute the territories to the sales managers who directly report to them, who in turn further distribute the territories down to the individual sales representatives.

### Named Accounts

At the beginning of a new selling year, your manager distributes named accounts to his

directs, including you and other sales managers. Your first action (see Viewing Your Named Accounts, page 5-2 and Reviewing Your Account Assignments, page 5-14) is to review the accounts assigned to you and decide how you want to distribute them to your salespeople.

You can use alignments (see Creating a Named Account Territory Alignment, page 5-7) to create what-if territories (see Assigning Named Accounts for an Alignment, page 5-8) and compare them (see Comparing Alignments, page 5-9) until you find the best alignment, and then activate the alignment (see Activating a Territory Alignment, page 5-12) to create the territories and assignments.

You can alternatively distribute named accounts to your directs by adding your directs to the sales team of one or several named accounts at a time (see Assigning the Sales Team to Named Accounts, page 5-4).

After assigning the sales team to named accounts, you review the distribution (see Reviewing Your Account Assignments, page 5-14) and make any necessary adjustments.

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

## Overview of Geographic Territories

Geographic territories are defined using postal codes. To speed the process for creating a geographic territory, 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.

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.

## Viewing Your Named Accounts

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

### Prerequisites

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

**Steps:**

1. Perform either a simple search, page 5-3 or an advanced search, page 5-3.  
The list of your named accounts appears including sales team information.
2. Click the name to see the 360 degree view of the customer provided by Oracle Trading Community Architecture.

The address and sales team information appear.

## Searching for a Named Account

Use this procedure to search for a named account from the Named Account tab.

**Steps:**

1. In the simple search, select one of the following search criteria:
  - Named Account
  - Site Type
  - City
  - State
  - Postal Code
  - Territory Group
2. Enter one or more characters to search on.
3. Click **Go**.

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

## Using Advanced Search

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

**Steps:**

1. In the Named Account page, click **Advanced Search**.  
The Advanced Search page appears.

2. Enter one or more search criteria in the fields provided.
3. Click **Go**.

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

## Restrictions

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

## Assigning the Sales Team to Named Accounts

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

## Prerequisites

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

### Steps:

1. Perform either a simple search or an advanced search.  
A list of named accounts appears.
2. In the Select column, select one or many named accounts to update.
3. Click **Update Sales Team**.  
The Update Sales Team page lists the selected accounts.
4. If you want to add a salesperson to the sales team, then perform the following steps in the Add Salesperson section:
  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 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.
  3. If you want the salesperson added to subsidiaries of the selected named account, then select **Add to Subsidiaries**. This only applies to subsidiaries that are named accounts.

5. 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.
  2. If you want the salesperson removed from subsidiaries of the selected named account, then select **Remove from Subsidiaries**.
  3. If you want to remove another salesperson, then click **Add Another Row** and repeat from step a.
6. Click **Apply**.

Your changes are saved.

## Restrictions

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

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

When a salesperson assigned to a territory is removed from a sales group or role, you need to update the territory definition to the new group or role.

## Exporting Named Accounts to Microsoft Excel

You can export named accounts that you own to Microsoft Excel. Sales representatives can print from the spreadsheet. In the spreadsheet, managers can edit the salesperson, group, and role to import back into the customer database.

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

## Prerequisites

- You must own the named accounts.
- You must use Microsoft Internet Explorer as your browser.
- Microsoft Excel is closed on your computer.

**Steps:**

1. Conduct a search to find the named accounts you want to export. If you want to export all, then do not select criteria.  
The search results appear on the Named Account page.
2. Click **Export**.
3. View the Download Messages window for number of records exported and the success of the download.
4. Switch to your spreadsheet program to view, print, and edit your named accounts.

**Restrictions**

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.

**Uploading Named Accounts from Spreadsheet**

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

**Prerequisites**

- You must own the named accounts.
- You must use Microsoft Internet Explorer as your browser.
- Perform an export of named accounts.
- One or more named accounts in the spreadsheet must be flagged as being changed. When you edit a row in the spreadsheet, the flag in the first column of the spreadsheet automatically turns on.

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

**Steps:**

1. Open the spreadsheet if you saved it after making your edits in a prior session.

2. From the **Oracle** menu, choose **Upload**.

The Upload window opens.

3. Make sure you select Pre-Validate when uploading. Click **Upload**.

The Upload Messages window displays the number of records uploaded and when the upload is successful.

4. Switch to your Named Account page.
5. Query again to view your updated information.

## 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. The LOVs are not available when you work remotely.

## Transferring Named Accounts

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

### Steps:

1. Perform a search for named accounts.
2. In the Select column, select one or many named accounts to transfer.

3. Click **Update Sales Team**.

The Update Sales Team page lists the selected accounts.

4. Remove the existing salesperson or sales team.
5. Add the new sales team. If you do not add a new salesperson or sales team and have deleted all of the existing sales team, then you (the sales manager) remain assigned to the named account.

6. Click **Apply**.

The transfer is saved.

## Creating a Named Account Territory Alignment

Alignments are models of proposed named account assignments a manager uses to try different assignment strategies until the best alignment is found that meets the

manager's goals. You can compare alignments and fine tune your account assignments before activating the proposed territories, thereby creating fair territory assignments that balance sales potential and quota. Use this procedure to create an alignment.

## Prerequisites

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

### Steps:

1. In the named account tab, click **Align Territory**.  
A list of existing alignments appears.
2. Click **Create Alignment**.  
The Create Alignment page displays proposed territories. The proposed territories are named for each salesperson who reports to you and one proposed territory with your name.
3. Enter a name for this alignment.
4. Enter your total quota amount.
5. Enter proposed quota amounts for each proposed territory.
6. Click **Apply**.

The new alignment appears in the list of alignments. You can now fine tune the account assignments, page 5-8 and compare two alignments, page 5-9.

## Assigning Named Accounts for an Alignment

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

## Prerequisites

- You must have a manager role and have direct reports.
- You must own named accounts.
- You created an alignment, page 5-7.

### Steps:

1. In the Named Account tab, click **Align Territory**.

A list of existing alignments appears.

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

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

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

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

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

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

You can now compare your alignment, page 5-9 with another alignment, and activate it if you decide it is correct. When activated, it replaces your current named account territory assignments.

## Comparing Alignments

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

The balance index provides a quick way to judge the fairness and efficiency of your proposed territory alignment by calculating standard deviations for selected metrics. If

every salesperson on your team has the same relationship between his quota and the metric for his assigned named accounts, then the standard deviation is zero and the index is 100. If one salesperson in the group has a much higher quota compared to the metric for his assigned named accounts, then the standard deviation is higher and the balance index is lower.

## Prerequisites

- You must have a manager role and have direct reports.
- You must own named accounts.
- You created at least one alignment, page 5-7.
- You assigned named accounts, page 5-8 in the alignment.
- The concurrent program *Calculate Territory Alignment Metrics* should be run whenever there are changes in the Dun & Bradstreet information, such as number of employees or annual revenue; changes in the desired date range set in the *Territory Alignment Metric Calculation* system profile options; and when new named accounts are created.

## Steps:

1. Click **Align Territory**.  
A list of existing alignments appears.
2. Select two alignments and click **Compare**.
3. The Compare Alignments: Prioritize Metrics page appears.
4. Choose how you want to weight the four performance metrics. The four metrics are:
  - DNB Annual Revenue
  - DNB Number of Employees
  - Number of Named Accounts owned by each salesperson
  - Prior Sales (Prior sales is the sum of all the Won opportunities within a period of time for the named account. This period is set in the system profile options *Territory Alignment Metric Calculation From Date* and *Territory Alignment Metric Calculation To Date*.)  
The weighting options are:
    - Unimportant (weighted as 0)

- Of Little Importance (weighted as 1)
  - Moderately Important (weighted as 2)
  - Important (weighted as 3)
  - Very Important (weighted as 4)
5. Click **Continue**.
- The Compare Alignments: Review Comparison page displays a table to compare the two alignments that contains the following columns.
- **Alignment Balance Index:** The calculated index takes into consideration the weighting of each metric and the standard deviation for each metric. An index of 100 is a perfect score, with no standard deviations. The closer to an index of 100 your alignment is, the more balanced it is between your salespeople.
  - **Total Proposed Quota:** You can compare the total quota amounts proposed for each alignment.
  - **Percent Quota Overassigned:** This is the proposed quota for each alignment divided by your quota, shown as a percentage. For example, you as a manager have a quota of \$10M but you allocate \$12M to your directs. Your overassignment percentage is 120%.
6. You can view graphs for each alignment for a single metric by selecting that metric. Your weighting of the metric does not apply. The graph shows the percentage of the total metric that each salesperson owns compared to the percentage of the total proposed quota that he has been assigned.
- When you have an alignment that best meets your goals, you are ready to activate, page 5-12 it.

## Restrictions

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

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

**Standard Deviation as a Measure of Balance:** The standard deviation is often used by investors to measure the risk of a stock or a stock portfolio. In this case, sales managers can use standard deviation to measure the balance or imbalance of a metric. The basic

idea is that the standard deviation is a measure of imbalance: the more a salesperson's territory potential varies from the same salesperson's quota, the more imbalanced territory and quota are.

The calculated metrics for an existing alignment do not change until an export and upload are done. For example, an existing alignment includes account A which is no longer one of your named accounts. When you export the alignment it includes only named accounts you currently own. (See Assigning Named Accounts for an Alignment, page 5-8.) When you upload, the metrics are newly calculated based on current named accounts in the alignment.

## Activating a Territory Alignment

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

### Prerequisites

- You must have a manager role and have direct reports.
- You must own named accounts.
- You created an alignment, page 5-7 and uploaded your assignment changes, page 5-8 for it.
- You compared alignments, page 5-9 (recommended).

### Steps:

1. Click **Align Territory**.  
A list of existing alignments appears.
2. For the chosen alignment, click **Activate**.

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

## Creating a Geographic Territory

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

## Prerequisites

- 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**. Make sure you select Pre-Validate when uploading.

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 *Synchronize Territory Assignment Rules (STAR)* concurrent program is run, the territories are created.

## Restrictions

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

## Reviewing Your Account Assignments

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

### Steps:

1. Select the Salesperson subtab.

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

## Restrictions

The information is updated when the *Named Account Post Processing* concurrent program is run. The concurrent program refreshes the named account and geography distribution information for the Sales User responsibility.

---

## Spreadsheet, Searches, and Reports

This chapter covers the following topics:

- Using Spreadsheet
- Sales Team Search
- Territory Search
- Territory Definition Report
- Territory Changes Report
- Overlapping Named Account Territory Report

### Using Spreadsheet

You can copy and move territories by exporting all definition information to a spreadsheet, make your changes in the spreadsheet, and then uploading your changes back to the database. You can add new territories by entering the information in the correct format and then uploading from the spreadsheet.

#### To export:

1. Locate the territory you want to work with in the Territories tab and click the **Export** icon.
2. Choose to export only the selected territory, the territory and its immediate children, or the territory and all of its child territories.
3. If the territory contains geographic matching attributes, then you can choose to export only the territory definitions, only geographies that fall within the territory definition that are not yet assigned to child territories, or both.
4. If you selected to export unassigned geographies, then you also need to select the geographic types that you want included in your export such as city and country. The list does not display geographic types that do not fall within the selected

territory definition. For example, if the selected territory is a city, then state and country are not in the list.

For the selected geographic types, the spreadsheet displays all the geographic values that fall within the territory definition and that are not yet assigned to child territories.

### **To delete:**

You can delete one or more lines of territory information in your spreadsheet by selecting Delete in the Action column. You can delete one or more lines of a territory definition. You can delete a particular matching attribute value by removing the value from the relevant cell. To delete an entire territory, select Delete for the territory header row.

### **To copy:**

You can copy one or more lines in the spreadsheet in order to copy one attribute for a territory or the resources or the full territory definition. When you paste the copied line into the spreadsheet, you must change the Action column to Create.

You can then make any changes needed to the copied line for your new territory definition.

### **To update:**

When you change information in the spreadsheet for a territory, be sure the Action field is set to Update before uploading your changes.

### **To create a new territory:**

Export at least one territory for the correct usage, such as the parent for your new territory. The spreadsheet columns and LOVs are different for different usages. Add rows in the spreadsheet to create a new territory. Make sure the Territory Action column is set to Create for each new additional line of information you add.

### **Notes**

- You can create a territory with only the following required information. Resources and matching attributes are not required to create a new territory. Select Territory Details in the Header column. Enter operating unit, select a parent from the Hierarchy LOV, enter name, start and end date, and rank. The number of winners defaults to 1. Select a territory type from the LOV.
- To add matching attributes to a territory, in a new row select Matching Attributes in the Header column and add the desired information. Many matching attributes have LOVs for the column. All enabled matching attributes appear as columns. Use only matching attributes that are included in the territory type for your territory. The territory name and hierarchy are also required.

- To add resources to a territory, in a new row select Resources in the Header column. Use the LOV to select a resource. Select access rights for each type of transaction. You can also use copy and paste. Territory name, hierarchy, and resource dates are also required.

### **To move a territory in the hierarchy:**

To move a territory you change the hierarchy information to the new parent.

### **To upload the new definitions:**

In Excel there is an Oracle menu. Choose Upload to upload your changes to the database. Choose whether to upload all rows or just the rows that are flagged as containing changes.

Make sure you select Pre-Validate when uploading. Your changes are validated when uploaded and any that violate rules are rejected and comments appear in the spreadsheet.

## **Sales Team Search**

Use this procedure to search for sales customers, either organizations or persons. You can view the sales team and territory information for the customers. Hierarchy information (from Oracle TCA) is available for organizations. This search is available stand alone as well as available to territory administrators and sales management.

Role for the stand alone search: Sales Team Search User

### **Notes**

- **Identifying addresses only:** In the search criteria, you can select Identifying Addresses Only in order to see only the primary site for an organization. If the box is deselected, then all site addresses for an organization are included in the search results.
- **Sales Team:** In the search results, click the icon to view the sales team for an organization.
- **Territory Effective Date:** In the sales team list, you can select an effective date and view only the sales team active on that date. The default is today's date.
- **Territory and Parent Territory:** You can click the territory name to view details for the territory.
- **Customer Hierarchy:** In the search criteria, select the type of hierarchy you want to view. Click the icon in the search results to view the hierarchy of the customer organization. In the hierarchy page you can filter the hierarchy by selecting specific roles within the hierarchy, such as Subsidiaries Of. You can also choose to view the hierarchy for a particular date.

- **Alias:** Columns that list alias names for the organization can be included using personalization.

## Territory Search

Search for and view territories in the Territories tab. You can search within any usage. View territory hierarchies and drill down into the territory details. The territory search is a starting point for creating new territories, updating territory information, or mapping named account definitions. You can drill down to a 360 degree view of a named account customer, provided by Oracle Trading Community Architecture.

### Notes on Hierarchy View

- Click the View Full Hierarchy button to view the territory hierarchy.
- All territories within your selected operating unit, usage, and active date appear.
- You can expand hierarchies to view child territories.
- Select a territory name to view the detailed definition.
- Select a territory and click Create to create a child territory.
- Select a territory and click Update to update the territory definition.
- Click Export for a territory to export that territory to spreadsheet and optionally modify its definition in the spreadsheet.

### Notes on Search View

- Select the operating unit and usage in which you want to search.
- Select an individual territory type from which the territories were created, or select all territory types.
- The More Options list of criteria changes depending upon the matching attributes of the selected territory type.
- The Territory Hierarchy icon will take you to the territory hierarchy view.
- Display Territories Inheriting These Values: For example, if you enter State=CA and select this option, then the search returns all territories that reside within CA.

### Notes on Named Account View

- If you selected the named account territory type, then you have additional choices.
  - Display the list of named accounts
  - Display the generic territory header definition results (parent, rank, winners,

and so on)

- Identifying Addresses Only: Select to only include the identifying address for each organization. Deselect to include all site addresses.
- If you select a hierarchy type, then the search results includes a customer hierarchy column. Select the icon to view the customer party hierarchy stored in Oracle Trading Community Architecture.
- Mapped: displays whether the matching attributes have yet been mapped by the administrator.
- Update Mapping: Click to map the matching attributes.
- Click the name link to see a 360 degree view about the customer including marketing, credit, sales, and service information.

## Territory Definition Report

The Territory Definition Report lists territory definitions within a selected usage. You can further refine the report by selecting a resource to list only those territories that have that resource assigned to them. Or you can also limit the report to territories defined using a selected matching attribute. The default date is today's date, but you can select any date, including a future date, to show territory definitions active on the selected date.

## Territory Changes Report

Use the Territory Changes Report to trace territory change information since a specified date. This report displays your updated territory information but does not show the differences from the territory definitions before any changes were made. You can restrict the report further to a date range when changes were made by selecting a latest change date.

The report lists only territories active on the selected active date, which defaults to today. You can select a different active date, including a future date.

## Overlapping Named Account Territory Report

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

The report is accessed from the Dashboard. You can enter a value for one of three parameters to run the report:

- Territory name
- Named Account
- DUNS Number

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

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# Glossary

## **Alignment**

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

## **Automatic Assignment**

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

## **Catch All**

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

## **Effective Dates**

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

## **Matching Attributes**

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

## **Named Account**

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

## **Number of Winners**

The Number of Winners field is used to specify the maximum number of potential winning territories. It does not apply to top level territories, but is set at the top level and applies to the hierarchy below the top level.

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

winners for a territory it defaults to the number of winners for its parent.

### **Operators**

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

### **Rank**

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

### **Sales Hierarchy**

Defined in Oracle Resource Manager, this is the structure of the sales force within the organization.

### **Territory**

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

### **Territory Type**

Territory types are the building blocks for all territories. A territory type is defined by a specific set of matching attributes.

### **Top-level Territory**

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

### **Transaction Matching Attributes**

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

### **Winner, or winning territory**

The territory that receives the transaction or customer.

### **Usage**

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

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