Siebel Territory Management Guide

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Contents

Chapter 5: Sales Quotas and Siebel Territory Management

Chapter 6: Activating and Maintaining Territory Alignments

Chapter 7: Using Siebel Enterprise Integration Manager with Siebel Territory Management

Index

1 What's New in This Release

What's New in Siebel Territory Management Guide, Siebel Innovation Pack 2015

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

NOTE: Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

2 Overview of Siebel Territory Management

This chapter is about the concepts and terminology required to understand Siebel Territory Management. It includes the following topics:

- "About Siebel Territory Management" on page 9
- "Terminology For Siebel Territory Management" on page 10
- "Roadmap for Using Siebel Territory Management" on page 11

About Siebel Territory Management

The purpose of Siebel Territory Management is to manage sales and service territories. For example, Siebel Territory Management can be used to assign sales representatives to accounts and contacts based on territory or to assign ownership of assets to field service engineers based on territory.

You create (or bulk load) rules in Siebel Territory Management. These rules determine how the assignments are made. You can review the results of these rules before the actual assignments are made in the database. Then you align territory assignments based on these rules.

Why Is Siebel Territory Management Important?

Maintaining sales representatives and their managers is a major cost to organizations. For this reason, it is very important to keep territories well aligned with the sales force. 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 Territory Management does not tell you how to align your territories with your sales force, but it makes territory alignments faster and simpler so that you can align and realign your territories as needed.

About Siebel Territory Management for Siebel Industry Applications

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

NOTE: Geo zone rules and assignment by asset are only available for Siebel Industry applications.

Terminology For Siebel Territory Management

Table 3 defines some terms that are used in this book and in Siebel Territory Management's user interface.

Table 3. Terms Used in Siebel Territory Management

Term	Description
territory	A territory is a collection of accounts, contacts, assets, or a combination thereof that are assigned to an employee. Usually a territory is based on a geographic area: either a collection of postal codes or geo zones.
	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 has some accounts outside the city where she already has established strong relationships.
	Territories can be related to each other through the territory hierarchy.
	NOTE: The word territory is used in other places in Siebel Business Applications, where it is not related to the Siebel Territory Management feature described in this guide. For example, the Territory field in the Accounts form is unrelated to the Siebel Territory Management feature.
territory hierarchy	The territory hierarchy is a collection of territory nodes. It determines which territories are active and available for assignment.
	For example, territories can be defined for the whole country, but you can define a territory hierarchy that only contains active territories for the southwest region, so only this region of the country is considered for update when you run the territory alignment for this hierarchy.
	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.
territory nodes	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 active, that is, available for assignment.
division	In Siebel Territory Management, a division is typically used to represent a sales force. A division might only be associated with one territory hierarchy. However, you can have multiple divisions in one territory hierarchy.
	For example, the oncology sales force and the neurology sales force can together make up the specialty territory hierarchy.

Table 3. Terms Used in Siebel Territory Management

Term	Description
territory alignment	*Territory alignment* is the mapping of positions (employees), accounts, contacts, and assets to territories. This mapping is determined through rules.
	The territory alignment record contains both the rules describing the alignment and the assignments that are made when the rules are applied.
	When a territory alignment is run, the results of the rules are calculated. However, accounts, contacts, and assets are not actually assigned to employees in the database until the alignment becomes active.
rules	Rules determine how territories are mapped to positions, accounts, contacts, and assets.
geo zones	A *geo zone* 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.
	In the pharmaceutical industry, geo zones are often called *bricks*.
	Geo zones are only available in Siebel Industry Applications.

Roadmap for Using Siebel Territory Management

To use Siebel Territory Management, perform the following processes and tasks:

■ "Process of Setting Up Siebel Territory Management" on page 15

■ "Process of Setting Up and Running Territory Alignments" on page 58

■ "Process of Creating and Aligning Sales Quotas" on page 79 (optional)

■ "Activating Territory Alignments" on page 94

■ "Using the Periodic Runs Workflow to Maintain Territory Alignments" on page 99

3 Setting Up Siebel 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 Setting Up Siebel Territory Management" on page 13
- "About Territory Hierarchies and Divisions" on page 13
- "Process of Setting Up Siebel Territory Management" on page 15
- "Configuring End-Date Behavior for Territory Nodes" on page 21
- "Improving Performance of Siebel Territory Management" on page 21

About Setting Up Siebel Territory Management

This chapter describes administration tasks that are specific to Siebel Territory Management. Use this chapter in combination with *Siebel Applications Administration Guide* and *Siebel Security Guide*.

Siebel Applications Administration Guide and *Siebel Security Guide* 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. *Siebel 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 Business application. If you have not, go to the Siebel Bookshelf, and click the links to the guides that are relevant to your company's implementation.

NOTE: The Siebel Bookshelf is available on Oracle Technology Network (http://www.oracle.com/technetwork/indexes/documentation/index.html) and Oracle E-Delivery. It might also be installed locally on your intranet or on a network location.

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

About Territory Hierarchies and Divisions

A hierarchy is a group of territories and of sales forces (or in Siebel CRM terminology, *divisions*).

Figure 1 on page 14 shows an example of a hierarchy with two divisions.

Depending on your business needs, you might choose to have one division in your territory hierarchy or multiple divisions in the territory hierarchy. For large hierarchies, it might 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 1 shows a territory hierarchy made up of two divisions.
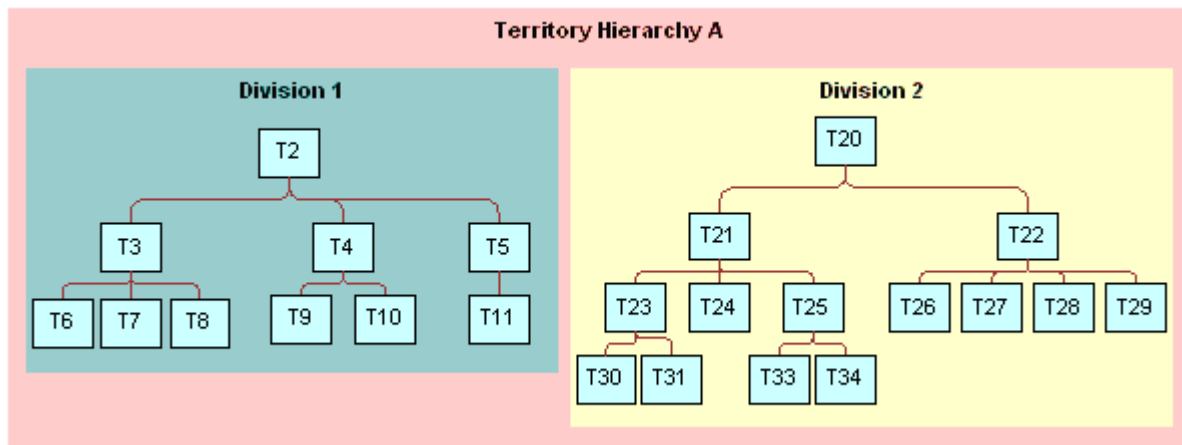
Figure 1.   Schematic Example of a Territory Hierarchy Made Up of Two Divisions

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 1, 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 Siebel 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.

One Territory in Multiple Hierarchies

You can include one territory in multiple hierarchies. For example, Territory 1 can belong to both Hierarchy 1 and Hierarchy 2.

One hierarchy must be the primary hierarchy for the territory. This feature allows you to can create alignments of the same territories that are based on different hierarchies. For example, you can define Alignment 1 for Hierarchy 1 and define Alignment 2 for Hierarchy 2, with Territory 1 belonging to both Hierarchy 1 and Hierarchy 2.

This makes it possible to create hierarchies that organize your territories in several different ways, and to run alignments for all of these hierarchies, to see how the different hierarchies affect the assignment. For example, you could set up multiple hierarchies to test how quotas would change if you reduce the number of nodes at an intermediate level of the hierarchy.

Only the alignment for the primary hierarchy can be activated. When you activate a hierarchy, Siebel Territory Management checks to see that all the territories in the hierarchy have this hierarchy as their primary hierarchy. If they do not, Siebel Territory Management does not let you activate the hierarchy.

The other hierarchies are used to simulate other results. You must run major alignments on all hierarchies except for the primary hierarchy. You can run minor and intermediate alignments only on the primary hierarchy.

Running a major alignment on a nonprimary hierarchy shows the complete result set for that nonprimary hierarchy, but it does not show changes relative to existing assignments for territories in the primary hierarchy. You might need to compare this result set with existing assignments to identify delta changes.

After you have run alignments for the nonprimary hierarchies, and you have seen which gives you the best results, then you should make the appropriate changes in the primary hierarchy, so you can run and activate the primary hierarchy. For more information about hierarchies, see "Tasks for Working with Territory Hierarchies" on page 109.

Process of Setting Up Siebel Territory Management

To set up Siebel Territory Management, perform the following tasks:

1   "Verifying Enterprise Data for Siebel Territory Management" on page 15

2   "Enabling Component Groups for Siebel Territory Management" on page 16

3   "Activating Workflows for Siebel Territory Management" on page 16

4   "Setting up Assignment Manager's Load Splitter for Siebel Territory Management" on page 17

5   "Setting Up Divisions and Positions for Siebel Territory Management" on page 18

6   "Setting Up a Territory Hierarchy" on page 18

7   "Setting Up Territory Nodes" on page 19

This process is a step in "Roadmap for Using Siebel Territory Management" on page 11.

Verifying Enterprise Data for Siebel Territory Management

Siebel Territory Management uses data that has probably already been entered in your Siebel Business applications, such as accounts and contacts. You should verify that this data has been entered and is available for Siebel Territory Management.

This task is a step in "Process of Setting Up Siebel Territory Management" on page 15.

Table 4 summarizes the enterprise data used by Siebel Territory Management.

Table 4.   Siebel Territory Management Administrative Tasks

Enterprise Data	Description	For More Information
Account and Contact objects	If you are going to be assigning accounts and contacts to territories, make sure that the data for these objects is accurate and complete.	*Siebel Applications Administration Guide*
Asset objects	If you are going to be assigning assets to territories, make sure that the data for these objects is accurate and complete.	*Siebel Field Service Guide*
Geo zone objects (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.	*Siebel Life Sciences Guide*
Opportunity objects	If you align territories by opportunity, then you must create the opportunities and assign them to sales representatives.	*Siebel Applications Administration Guide*

Enabling Component Groups for Siebel Territory Management

You must enable the component groups on the server that are used by Siebel Territory Management.

This task is a step in "Process of Setting Up Siebel Territory Management" on page 15.

To enable component groups

1   Navigate to the Administration – Server Configuration screen, Enterprises, and then Component Groups view.

2   In the Component Groups list and Components sublist, select the following components and click Enable:

■   Assignment Management group, Batch Assignment component.

■   Workflow Management group, Workflow Process Manager component.

■   Siebel RTI group, RTI Batch component.

Activating Workflows for Siebel Territory Management

You must activate the workflows that are used by Siebel Territory Management.

This task is a step in "Process of Setting Up Siebel Territory Management" on page 15.

To activate workflows

1   Navigate to the Administration – Business Process screen, Workflow Deployment view.

2   In the Workflow Processes list, in the Name field, query for *Align**.

    All workflows that begin with Align appear.

3   Select all these workflows and click Activate.

Setting up Assignment Manager's Load Splitter for Siebel Territory Management

Siebel Assignment Manager is used to run territory alignments, and you must set up the load splitter that distributes the load of records for processing in Assignment Manager. For more information, see *Siebel Assignment Manager Administration Guide*.

This task is a step in "Process of Setting Up Siebel Territory Management" on page 15.

To set up load splitter

1   Navigate to the Assignment Administration screen, Load Splitter Configuration view.

2   Create a new record in the Load Splitter Configuration applet and complete the necessary fields, described in the following table.

Field	Comments
Name	Enter your machine's name.
Threshold	Enter *10,000*
Minimum Batch Size	Enter *5,000*

3   Scroll down and create a new record in the Server Configuration Applet. Complete the necessary fields, described in the following table.

Field	Comments
Priority	Enter *1*
Server Name	Enter the name of your server.
Number of Tasks	Enter *10*

4   Write down the Configuration ID for the current record in Load Splitter Configuration applet.

5   Set system preferences:

a   Navigate to the Administration - Application screen, System Preferences view.

b   Query for *RunAlignmentLoadBalancerConfig* and *ActivationLoadBalancerConfig*.

c   If you cannot find these properties, create them.

d   Set the values of these properties to the Configuration ID you copied in Step 4.

6   Synchronize the server:

a   Navigate to the Administration - Server Configuration screen, Enterprises, and then Synchronize view.

b   Click the Synchronize button.

c   Wait until the task is finished.

Setting Up Divisions and Positions for Siebel Territory Management

In Siebel 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 might create three divisions, one each for the neurology, cardiovascular, and oncology pharmaceutical sales forces.

Positions are assigned to the divisions. These positions represent the employees 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 Siebel business applications, appropriate divisions and positions are probably already set up. See *Siebel Security Guide* for detailed 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 Siebel Territory Management.

This task is a step in "Process of Setting Up Siebel Territory Management" on page 15.

Setting Up a Territory Hierarchy

To set up the territory hierarchy, 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); you define this specification later as part of the territory alignment. For example, you might 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 7, "Using Siebel Enterprise Integration Manager with Siebel Territory Management."

This task is a step in "Process of Setting Up Siebel Territory Management" on page 15.

To create a territory hierarchy and territory records

1 Create the territory hierarchy record:

    a Navigate to the Siebel Territory Management screen, then the Hierarchies List view.

    b Create a new record and complete the necessary fields.

2 Create the territory records:

    a Navigate to the Siebel Territory Management screen, then the Territories Administration 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.
Primary Hierarchy	Select the primary hierarchy for this territory. Alignments can be activated only for the primary hierarchy. Nonprimary hierarchies are used only for simulation, as described in "One Territory in Multiple Hierarchies" on page 14.
Division	Make sure you have assigned the hierarchy to divisions before entering the division here. 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

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.

This task is a step in "Process of Setting Up Siebel Territory Management" on page 15.

About Structuring Territory Nodes as a Family Tree

Territory node records are also used to determine the structure of the territory hierarchy. You create the structure of the territories in the hierarchy 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 "Generating Reporting Structures Based on Territory Hierarchy" on page 97.

■ Siebel Territory Management 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.

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 changed 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 21.

Creating Territory Nodes
NOTE: For information about creating territory nodes through bulk loading, see Chapter 7, "Using Siebel Enterprise Integration Manager with Siebel Territory Management."

To create territory nodes

1 Navigate to the Siebel Territory Management screen, then the Hierarchies List view.

2 Click the Name field of a hierarchy record to drill down on it.

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 #	Select a territory that you created in "Setting Up a Territory Hierarchy" on page 18.
Parent Territory #	If this is a child node, select its parent node. You can select only active and future nodes. (Expired nodes cannot be selected as parents.)
Effective Start Date	Typically, 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 plus one.
	For more information about these fields, see "Restrictions on Effective Start and End Dates for Territory Nodes" on page 20.

Configuring End-Date Behavior for Territory Nodes

Without configuration, territory node records become read-only when a record's effective end date has passed.

Depending on your business requirements, you might 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 Oracle's Siebel Tools, for the Territory Hierarchy Node business component, inactivate the user property called BC Read Only Field.

Improving Performance of Siebel Territory Management

Siebel Territory Management comes with a set of preconfigured rule attributes and condition attributes. In order to improve performance of your implementation, you can inactivate the ones that are not used in your implementation. Perform the following tasks:

■ "Inactivating Target Object Selector (TOS) User Properties That Are Not Needed" on page 22

■ "Inactivating Assignment Manager Rule User Properties That Are Not Needed" on page 24

- ■ "Inactivating Local Condition User Properties That Are Not Needed" on page 27
- ■ "Modifying Business Components to Improve Performance" on page 46

CAUTION: These changes apply across your implementation of Siebel Territory Management.
Inactivate only those rules that you are not using and do not intend to use in the future across all
divisions and hierarchies in your entire implementation.

Inactivating Target Object Selector (TOS) User Properties That Are Not Needed

Use the following procedure to inactivate rule attributes that are not needed.

To inactivate Target Object Selector (TOS) user properties that are not needed

1 In Siebel Tools, navigate to Business Services.

2 Query to find the Target Object Selector Service.

3 Display the user properties of this business service.

4 In the Name field of the user properties, query for *Join Path BC*.

5 Inactivate all user properties in the query result.

6 Activate the user properties you need by referring to the following table. If your implementation
   uses a combination of Object, Affiliation, and Rule listed in the table, then query on the Value
   field, and activate all the user properties in the query result.

Object	Affiliation	Rule	Query in Value field for
Account	(None)	GeoZone	*Geo Zone-Account
Account	Contact	GeoZone	*Geo Zone-Account-Contact OR *Geo Zone-Account
Account	Opportunity	GeoZone	*Geo Zone-Account-Opportunity OR *Geo Zone-Account
Account	(None)	Country	*Country-Account
Account	Contact	Country	*Country-Account-Contact OR *Country-Account
Account	Opportunity	Country	*Country-Account-Opportunity OR *Country-Account
Account	(None)	Postal Code	*Postal Code-Account
Account	Contact	Postal Code	*Postal Code-Account-Contact OR *Postal Code-Account
Account	Opportunity	Postal Code	*Postal Code-Account-Opportunity OR *Postal Code-Account
Account	(None)	State	*State-Account
Account	Contact	State	*State-Account-Contact OR *State-Account

Object	Affiliation	Rule	Query in Value field for
Account	Opportunity	State	*State-Account-Opportunity OR *State-Account
Account	(None)	Industry	*Industry-Account
Account	Contact	Industry	*Industry-Account-Contact OR *Industry-Account
Account	Opportunity	Industry	*Industry-Account-Opportunity OR *Industry-Account
Account	(None)	Product	*Product-Account
Account	Contact	Product	*Product-Account-Contact OR *Product-Account
Account	Opportunity	Product	*Product-Account-Opportunity OR *Product-Account
Contact	(None)	GeoZone	*Geo Zone-Contact
Contact	Opportunity	GeoZone	*Geo Zone-Contact-Opportunity OR *Geo Zone-Contact
Contact	(None)	Country	*Country-Contact
Contact	Opportunity	Country	*Country-Contact-Opportunity OR *Country-Contact
Contact	(None)	Postal Code	*Postal Code-Contact
Contact	Opportunity	Postal Code	*Postal Code-Contact-Opportunity OR *Postal Code-Contact
Contact	(None)	State	*State-Contact
Contact	Opportunity	State	*State-Contact-Opportunity OR *State-Contact
Contact	(None)	Industry	*Industry-Contact
Contact	Opportunity	Industry	*Industry-Contact-Opportunity OR *Industry-Contact
Contact	(None)	Product	*Product-Contact
Contact	Opportunity	Product	*Product-Contact-Opportunity OR *Product-Contact
Opportunity	(None)	GeoZone	*Geo Zone-Opportunity
Opportunity	(None)	Country	*Country-Opportunity
Opportunity	(None)	Postal Code	*Postal Code-Opportunity
Opportunity	(None)	State	*State-Opportunity
Opportunity	(None)	Industry	*Industry-Opportunity
Opportunity	(None)	Product	*Product-Opportunity
Contact	Opportunity	Direct	*Territory-Contact-Opportunity OR *Territory-Contact

Object	Affiliation	Rule	Query in Value field for
Account	Opportunity	Direct	*Territory-Account-Opportunity OR *Territory-Account
Account	Contact	Direct	*Territory-Account-Contact OR *Territory-Account
Contact	(None)	Direct	*Territory-Contact
Account	(None)	Direct	*Territory-Account
Asset	(None)	Direct	*Territory-Asset
Asset	(None)	State	*State-Asset
Asset	(None)	Postal Code	*Postal Code-Asset
Asset	(None)	Country	*Country-Asset
Asset	(None)	Product	*Product-Asset

7 Append _INACTIVE as suffix to the names of all inactive user properties.

8 After you have activated all the user properties, make sure that the active user properties are sequential:

   a Query in the user property Name field for all the following:

      ❏ Alignment Join Path BC:TM Contact*

      ❏ Alignment Join Path BC:TM Account*

      ❏ Alignment Join Path BC:TM Opportunity*

      ❏ Alignment Join Path BC:TM Asset*

      ❏ Minor Operational Join Path BC:TM Account*

      ❏ Minor Operational Join Path BC:TM Contact*

      ❏ Minor Operational Join Path BC:TM Opportunity*

      ❏ Minor Operational Join Path BC:TM Asset*

      ❏ Operational Join Path BC:TM Account*

      ❏ Operational Join Path BC:TM Contact*

      ❏ Operational Join Path BC:TM Opportunity*

      ❏ Operational Join Path BC:TM Asset*

   b Make sure that active user properties in each of these query results are sequential, by numbering the result for each query beginning with 1 and continuing without missing any number.

Inactivating Assignment Manager Rule User Properties That Are Not Needed

Use the following procedure to inactivate rule condition user properties that are not needed.

To inactivate Rule User Properties that are not needed,

1 Query for Business Component = Alignment.

2 Query User Properties for Name = Indirect Territory Rules*.

3 Inactivate all the user properties of the query result.

4 If you use any Alignment Rules, activate the user properties shown in the following table for the combinations of object, affiliation and rule that you are using in your implementation.

Object	Affiliation	Rule	Activate These User Properties
Account	Contact	Industry	Indirect Territory Rules 29
Account	Opportunity	Industry	Indirect Territory Rules 38
Account	Contact	Product	Indirect Territory Rules 28
Account	Opportunity	Product	Indirect Territory Rules 36
Account	(None)	Industry	Indirect Territory Rules 19
Contact	(None)	Industry	Indirect Territory Rules 20
Opportunity	(None)	Industry	Indirect Territory Rules 21
Account	(None)	Product	Indirect Territory Rules 15
Contact	(None)	Product	Indirect Territory Rules 16
Assets	(None)	Product	Indirect Territory Rules 17
Opportunity	(None)	Product	Indirect Territory Rules 18
Contact	Opportunity	GeoZone	Indirect Territory Rules 43
Contact	Opportunity	Postal Code	Indirect Territory Rules 35
Contact	Opportunity	Industry	Indirect Territory Rules 39
Contact	Opportunity	Product	Indirect Territory Rules 37
Assets	(None)	State	Indirect Territory Rules 9
Account	(None)	State	Indirect Territory Rules 7
Contact	(None)	State	Indirect Territory Rules 8
Opportunity	(None)	State	Indirect Territory Rules 10
Assets	(None)	Country	Indirect Territory Rules 13
Account	(None)	Country	Indirect Territory Rules 11
Contact	(None)	Country	Indirect Territory Rules 12
Opportunity	(None)	Country	Indirect Territory Rules 14
Contact	Opportunity	State	Indirect Territory Rules 31
Contact	Opportunity	Country	Indirect Territory Rules 33
Account	Contact	State	Indirect Territory Rules 26
Account	Opportunity	State	Indirect Territory Rules 30
Account	Contact	Country	Indirect Territory Rules 25
Account	Opportunity	Country	Indirect Territory Rules 32
Assets	(None)	Postal Code	Indirect Territory Rules 3

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Postal Code	Indirect Territory Rules 1
Contact	(None)	Postal Code	Indirect Territory Rules 2
Opportunity	(None)	Postal Code	Indirect Territory Rules 6
Account	(None)	GeoZone	Indirect Territory Rules 4
Contact	(None)	GeoZone	Indirect Territory Rules 5
Opportunity	(None)	GeoZone	Indirect Territory Rules 41
Account	Contact	Postal Code	Indirect Territory Rules 27
Account	Opportunity	Postal Code	Indirect Territory Rules 34
Account	Contact	GeoZone	Indirect Territory Rules 40
Account	Opportunity	GeoZone	Indirect Territory Rules 42
Account	Contact	Direct	Indirect Territory Rules 23
Account	Opportunity	Direct	Indirect Territory Rules 22
Contact	Opportunity	Direct	Indirect Territory Rules 24

NOTE: If you are using affiliations-based rules, such as Account-Contact-Postal Code, then along with activating user properties corresponding to Account-Contact-Postal Code, you must also activate user properties corresponding to the Account--Postal Code.

5   Append _INACTIVE as suffix to the names of all inactive user properties.

6   Renumber the user properties for active indirect territory rules in sequential order.

Inactivating Local Condition User Properties That Are Not Needed
Use the following procedure to inactivate local condition user properties that are not needed.

To inactivate local condition user properties that are not needed

1   Identify which of the following types of local conditions are used in your implementation:

■   Local Conditions based on Territory

■   Local Conditions based on Division

■   Local Conditions based on Postal Codes

■   Local Conditions based on Postal Codes & Territory (in the same condition)

■   Local Conditions based on Geo Zones

■   Local Conditions based on Geo Zones & Territory (in the same condition)

■   No Local Conditions

NOTE: Identify all the possible conditions that might be used in the entire implementation.

2 Query for Business Component = Alignment Condition.

3 Inactivate user properties:

   a Query for the following user property Name field:

   ❏ Conditions Sort Spec*

   ❏ Convert Conditions SearchSpec*

   ❏ Person Candidate Source Names*

   b For the result of each query, inactivate all user properties except the following:

   ❏ Conditions Sort Spec 33

   ❏ Conditions Sort Spec 34

   ❏ Conditions Sort Spec 35

   ❏ Convert Conditions SearchSpec 33

   ❏ Convert Conditions SearchSpec 34

   ❏ Convert Conditions SearchSpec 35

   ❏ Person Candidate Source Names 33

   ❏ Person Candidate Source Names 34

   ❏ Person Candidate Source Names 35

4 If you use local conditions based on territory, activate the user properties shown in the following
table for the combinations of object, affiliation and rule that you are using in your
implementation.

   NOTE: If you are using affiliations based rules like Account-Contact-Postal Code, then along with
   activating user properties corresponding to Account-Contact-Postal Code, also activate the user
   properties corresponding to the Account-Postal Code.

Object	Affiliation	Rule	Activate These User Properties
Account	Contact	Industry	Convert Conditions SearchSpec 24
Account	Opportunity	Industry	Conditions Sort Spec 24
Account	Contact	Product	Person Candidate Source Names 24
Account	Opportunity	Product	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Industry	Convert Conditions SearchSpec 19
Contact	(None)	Industry	Conditions Sort Spec 19
Assets	(None)	Product	Person Candidate Source Names 19
Account	(None)	Product	
Contact	(None)	Product	
Opportunity	(None)	Product	
Opportunity	(None)	Product	
Contact	Opportunity	GeoZone	Convert Conditions SearchSpec 13
Contact	Opportunity	Postal Code	Conditions Sort Spec 13
			Person Candidate Source Names 13
Contact	Opportunity	Industry	Convert Conditions SearchSpec 23
Contact	Opportunity	Product	Conditions Sort Spec 23
			Person Candidate Source Names 23
Account	(None)	State	Convert Conditions SearchSpec 20
Contact	(None)	State	Conditions Sort Spec 20
Opportunity	(None)	State	Person Candidate Source Names 20
Assets	(None)	State	
Assets	(None)	Country	
Account	(None)	Country	
Contact	(None)	Country	
Opportunity	(None)	Country	
Contact	Opportunity	State	Convert Conditions SearchSpec 21
Contact	Opportunity	Country	Conditions Sort Spec 21
			Person Candidate Source Names 21
Account	Contact	State	Convert Conditions SearchSpec 22
Account	Opportunity	State	Conditions Sort Spec 22
Account	Contact	Country	Person Candidate Source Names 22
Account	Opportunity	Country	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Postal Code	Convert Conditions SearchSpec 7
Contact	(None)	Postal Code	Conditions Sort Spec 7
Opportunity	(None)	Postal Code	Person Candidate Source Names 7
Assets	(None)	Postal Code	
Account	(None)	GeoZone	
Contact	(None)	GeoZone	
Opportunity	(None)	GeoZone	
Account	Contact	Postal Code	Convert Conditions SearchSpec 1
Account	Opportunity	Postal Code	Conditions Sort Spec 1
Account	Contact	GeoZone	Person Candidate Source Names 1
Account	Opportunity	GeoZone	
Account	Contact	Direct	Convert Conditions SearchSpec 31
Account	Opportunity	Direct	Conditions Sort Spec 31
Contact	Opportunity	Direct	Person Candidate Source Names 31

5 If you use local conditions based on division, activate the user properties shown in the following table for the combinations of object, affiliation and rule that you are using in your implementation.

NOTE: If you are using affiliations based rules like Account-Contact-Postal Code, then along with activating user properties corresponding to Account-Contact-Postal Code, you should also activate user properties corresponding to the Account--Postal Code.

Object	Affiliation	Rule	Activate These User Properties
Account	Contact	Industry	Convert Conditions SearchSpec 30
Account	Opportunity	Industry	Conditions Sort Spec 30
Account	Contact	Product	Person Candidate Source Names 30
Account	Opportunity	Product	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Industry	Convert Conditions SearchSpec 25
Contact	(None)	Industry	Conditions Sort Spec 25
Assets	(None)	Product	Person Candidate Source Names 25
Account	(None)	Product	
Contact	(None)	Product	
Opportunity	(None)	Product	
Opportunity	(None)	Product	
Contact	Opportunity	GeoZone	Convert Conditions SearchSpec 18
Contact	Opportunity	Postal Code	Conditions Sort Spec 18
			Person Candidate Source Names 18
Contact	Opportunity	Industry	Convert Conditions SearchSpec 29
Contact	Opportunity	Product	Conditions Sort Spec 29
			Person Candidate Source Names 29
Account	(None)	State	Convert Conditions SearchSpec 26
Contact	(None)	State	Conditions Sort Spec 26
Opportunity	(None)	State	Person Candidate Source Names 26
Assets	(None)	State	
Assets	(None)	Country	
Account	(None)	Country	
Contact	(None)	Country	
Opportunity	(None)	Country	
Contact	Opportunity	State	Convert Conditions SearchSpec 27
Contact	Opportunity	Country	Conditions Sort Spec 27
			Person Candidate Source Names 27
Account	Contact	State	Convert Conditions SearchSpec 28
Account	Opportunity	State	Conditions Sort Spec 28
Account	Contact	Country	Person Candidate Source Names 28
Account	Opportunity	Country	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Postal Code	Convert Conditions SearchSpec 12
Contact	(None)	Postal Code	Conditions Sort Spec 12
Opportunity	(None)	Postal Code	Person Candidate Source Names 12
Assets	(None)	Postal Code	
Account	(None)	GeoZone	
Contact	(None)	GeoZone	
Opportunity	(None)	GeoZone	
Account	Contact	Postal Code	Convert Conditions SearchSpec 6
Account	Opportunity	Postal Code	Conditions Sort Spec 6
Account	Contact	GeoZone	Person Candidate Source Names 6
Account	Opportunity	GeoZone	
Account	Contact	(None)	Convert Conditions SearchSpec 32
Account	Opportunity	(None)	Conditions Sort Spec 32
Contact	Opportunity	(None)	Person Candidate Source Names 32

6 If you use local conditions based on postal codes, activate the user properties shown in the following table for the combinations of object, affiliation and rule that you are using in your implementation.

NOTE: If you are using affiliations based rules like Account-Contact-Postal Code, then along with activating user properties corresponding to Account-Contact-Postal Code, you should also activate user properties corresponding to the Account--Postal Code.

Object	Affiliation	Rule	Activate These User Properties
Account	Contact	Industry	Convert Conditions SearchSpec 24
Account	Opportunity	Industry	Conditions Sort Spec 24
Account	Contact	Product	Person Candidate Source Names 24
Account	Opportunity	Product	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Industry	Convert Conditions SearchSpec 19
Contact	(None)	Industry	Conditions Sort Spec 19
Assets	(None)	Product	Person Candidate Source Names 19
Account	(None)	Product	
Contact	(None)	Product	
Opportunity	(None)	Product	
Opportunity	(None)	Product	
Contact	Opportunity	GeoZone	Convert Conditions SearchSpec 13
			Conditions Sort Spec 13
			Person Candidate Source Names 13
Contact	Opportunity	Postal Code	Convert Conditions SearchSpec 16
			Conditions Sort Spec 16
			Person Candidate Source Names 16
Contact	Opportunity	Industry	Convert Conditions SearchSpec 23
Contact	Opportunity	Product	Conditions Sort Spec 23
			Person Candidate Source Names 23
Account	(None)	State	Convert Conditions SearchSpec 20
Contact	(None)	State	Conditions Sort Spec 20
Opportunity	(None)	State	Person Candidate Source Names 20
Assets	(None)	State	
Assets	(None)	Country	
Account	(None)	Country	
Contact	(None)	Country	
Opportunity	(None)	Country	
Contact	Opportunity	State	Convert Conditions SearchSpec 21
Contact	Opportunity	Country	Conditions Sort Spec 21
			Person Candidate Source Names 21
Account	Contact	State	Convert Conditions SearchSpec 22
Account	Opportunity	State	Conditions Sort Spec 22
Account	Contact	Country	Person Candidate Source Names 22
Account	Opportunity	Country	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Postal Code	Convert Conditions SearchSpec 10
Contact	(None)	Postal Code	Conditions Sort Spec 10
Opportunity	(None)	Postal Code	Person Candidate Source Names 10
Assets	(None)	Postal Code	
Account	(None)	GeoZone	Convert Conditions SearchSpec 7
Contact	(None)	GeoZone	Conditions Sort Spec 7
Opportunity	(None)	GeoZone	Person Candidate Source Names 7
Account	Contact	Postal Code	Convert Conditions SearchSpec 4
Account	Opportunity	Postal Code	Conditions Sort Spec 4
			Person Candidate Source Names 4
Account	Contact	GeoZone	Convert Conditions SearchSpec 1
Account	Opportunity	GeoZone	Conditions Sort Spec 1
			Person Candidate Source Names 1
Account	Contact	(None)	Convert Conditions SearchSpec 31
Account	Opportunity	(None)	Conditions Sort Spec 31
Contact	Opportunity	(None)	Person Candidate Source Names 31

7 If you use local conditions based on postal codes and territory (in the same condition), activate the user properties shown in the following table for the combinations of object, affiliation and rule that you are using in your implementation.

NOTE: If you are using affiliations based rules like Account-Contact-Postal Code, then along with activating user properties corresponding to Account-Contact-Postal Code, you should also activate user properties corresponding to the Account--Postal Code.

Object	Affiliation	Rule	Activate These User Properties
Account	Contact	Industry	Convert Conditions SearchSpec 30
Account	Opportunity	Industry	Conditions Sort Spec 30
Account	Contact	Product	Person Candidate Source Names 30
Account	Opportunity	Product	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Industry	Convert Conditions SearchSpec 25
Contact	(None)	Industry	Conditions Sort Spec 25
Assets	(None)	Product	Person Candidate Source Names 25
Account	(None)	Product	
Contact	(None)	Product	
Opportunity	(None)	Product	
Opportunity	(None)	Product	
Contact	Opportunity	GeoZone	Convert Conditions SearchSpec 18
			Conditions Sort Spec 18
			Person Candidate Source Names 18
Contact	Opportunity	Postal Code	Convert Conditions SearchSpec 14
			Conditions Sort Spec 14
			Person Candidate Source Names 14
Contact	Opportunity	Industry	Convert Conditions SearchSpec 29
Contact	Opportunity	Product	Conditions Sort Spec 29
			Person Candidate Source Names 29
Account	(None)	State	Convert Conditions SearchSpec 26
Contact	(None)	State	Conditions Sort Spec 26
Opportunity	(None)	State	Person Candidate Source Names 26
Assets	(None)	State	
Assets	(None)	Country	
Account	(None)	Country	
Contact	(None)	Country	
Opportunity	(None)	Country	
Contact	Opportunity	State	Convert Conditions SearchSpec 27
Contact	Opportunity	Country	Conditions Sort Spec 27
			Person Candidate Source Names 27
Account	Contact	State	Convert Conditions SearchSpec 28
Account	Opportunity	State	Conditions Sort Spec 28
Account	Contact	Country	Person Candidate Source Names 28
Account	Opportunity	Country	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Postal Code	Convert Conditions SearchSpec 8
Contact	(None)	Postal Code	Conditions Sort Spec 8
Opportunity	(None)	Postal Code	Person Candidate Source Names 8
Assets	(None)	Postal Code	
Account	(None)	GeoZone	Convert Conditions SearchSpec 12
Contact	(None)	GeoZone	Conditions Sort Spec 12
Opportunity	(None)	GeoZone	Person Candidate Source Names 12
Account	Contact	Postal Code	Convert Conditions SearchSpec 2
Account	Opportunity	Postal Code	Conditions Sort Spec 2
			Person Candidate Source Names 2
Account	Contact	GeoZone	Convert Conditions SearchSpec 6
Account	Opportunity	GeoZone	Conditions Sort Spec 6
			Person Candidate Source Names 6
Account	Contact	(None)	Convert Conditions SearchSpec 32
Account	Opportunity	(None)	Conditions Sort Spec 32
Contact	Opportunity	(None)	Person Candidate Source Names 32

8   If you use local conditions based on geozones, activate the user properties shown in the following
    table for the combinations of object, affiliation and rule that you are using in your
    implementation.

NOTE: If you are using affiliations based rules like Account-Contact-Postal Code, then along with
activating user properties corresponding to Account-Contact-Postal Code, you should also
activate user properties corresponding to the Account--Postal Code.

Object	Affiliation	Rule	Activate These User Properties
Account	Contact	Industry	Convert Conditions SearchSpec 24
Account	Opportunity	Industry	Conditions Sort Spec 24
Account	Contact	Product	Person Candidate Source Names 24
Account	Opportunity	Product	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Industry	Convert Conditions SearchSpec 19
Contact	(None)	Industry	Conditions Sort Spec 19
Assets	(None)	Product	Person Candidate Source Names 19
Account	(None)	Product	
Contact	(None)	Product	
Opportunity	(None)	Product	
Opportunity	(None)	Product	
Contact	Opportunity	GeoZone	Convert Conditions SearchSpec 17
			Conditions Sort Spec 17
			Person Candidate Source Names 17
Contact	Opportunity	Postal Code	Convert Conditions SearchSpec 13
			Conditions Sort Spec 13
			Person Candidate Source Names 13
Contact	Opportunity	Industry	Convert Conditions SearchSpec 23
Contact	Opportunity	Product	Conditions Sort Spec 23
			Person Candidate Source Names 23
Account	(None)	State	Convert Conditions SearchSpec 20
Contact	(None)	State	Conditions Sort Spec 20
Opportunity	(None)	State	Person Candidate Source Names 20
Assets	(None)	State	
Assets	(None)	Country	
Account	(None)	Country	
Contact	(None)	Country	
Opportunity	(None)	Country	
Contact	Opportunity	State	Convert Conditions SearchSpec 21
Contact	Opportunity	Country	Conditions Sort Spec 21
			Person Candidate Source Names 21
Account	Contact	State	Convert Conditions SearchSpec 22
Account	Opportunity	State	Conditions Sort Spec 22
Account	Contact	Country	Person Candidate Source Names 22
Account	Opportunity	Country	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Postal Code	Convert Conditions SearchSpec 7
Contact	(None)	Postal Code	Conditions Sort Spec 7
Opportunity	(None)	Postal Code	Person Candidate Source Names 7
Assets	(None)	Postal Code	
Account	(None)	GeoZone	Convert Conditions SearchSpec 11
Contact	(None)	GeoZone	Conditions Sort Spec 11
Opportunity	(None)	GeoZone	Person Candidate Source Names 11
Account	Contact	Postal Code	Convert Conditions SearchSpec 1
Account	Opportunity	Postal Code	Conditions Sort Spec 1
			Person Candidate Source Names 1
Account	Contact	GeoZone	Convert Conditions SearchSpec 5
Account	Opportunity	GeoZone	Conditions Sort Spec 5
			Person Candidate Source Names 5
Account	Contact	(None)	Convert Conditions SearchSpec 31
Account	Opportunity	(None)	Conditions Sort Spec 31
Contact	Opportunity	(None)	Person Candidate Source Names 31

9 If you use Local Conditions based on geozone and territory (in the same condition), activate the
user properties shown in the following table for the combinations of object, affiliation and rule
that you are using in your implementation.

NOTE: If you are using affiliations based rules like Account-Contact-Postal Code, then along with
activating user properties corresponding to Account-Contact-Postal Code, you should also
activate user properties corresponding to the Account--Postal Code.

Object	Affiliation	Rule	Activate These User Properties
Account	Contact	Industry	Convert Conditions SearchSpec 30
Account	Opportunity	Industry	Conditions Sort Spec 30
Account	Contact	Product	Person Candidate Source Names 30
Account	Opportunity	Product	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Industry	Convert Conditions SearchSpec 25
Contact	(None)	Industry	Conditions Sort Spec 25
Assets	(None)	Product	Person Candidate Source Names 25
Account	(None)	Product	
Contact	(None)	Product	
Opportunity	(None)	Product	
Opportunity	(None)	Product	
Contact	Opportunity	GeoZone	Convert Conditions SearchSpec 15
			Conditions Sort Spec 15
			Person Candidate Source Names 15
Contact	Opportunity	Postal Code	Convert Conditions SearchSpec 18
			Conditions Sort Spec 18
			Person Candidate Source Names 18
Contact	Opportunity	Industry	Convert Conditions SearchSpec 29
Contact	Opportunity	Product	Conditions Sort Spec 29
			Person Candidate Source Names 29
Account	(None)	State	Convert Conditions SearchSpec 26
Contact	(None)	State	Conditions Sort Spec 26
Opportunity	(None)	State	Person Candidate Source Names 26
Assets	(None)	State	
Assets	(None)	Country	
Account	(None)	Country	
Contact	(None)	Country	
Opportunity	(None)	Country	
Contact	Opportunity	State	Convert Conditions SearchSpec 27
Contact	Opportunity	Country	Conditions Sort Spec 27
			Person Candidate Source Names 27
Account	Contact	State	Convert Conditions SearchSpec 28
Account	Opportunity	State	Conditions Sort Spec 28
Account	Contact	Country	Person Candidate Source Names 28
Account	Opportunity	Country	

Object	Affiliation	Rule	Activate These User Properties
Account	(None)	Postal Code	Convert Conditions SearchSpec 12
Contact	(None)	Postal Code	Conditions Sort Spec 12
Opportunity	(None)	Postal Code	Person Candidate Source Names 12
Assets	(None)	Postal Code	
Account	(None)	GeoZone	Convert Conditions SearchSpec 9
Contact	(None)	GeoZone	Conditions Sort Spec 9
Opportunity	(None)	GeoZone	Person Candidate Source Names 9
Account	Contact	Postal Code	Convert Conditions SearchSpec 6
Account	Opportunity	Postal Code	Conditions Sort Spec 6
			Person Candidate Source Names 6
Account	Contact	GeoZone	Convert Conditions SearchSpec 3
Account	Opportunity	GeoZone	Conditions Sort Spec 3
			Person Candidate Source Names 3
Account	Contact	(None)	Convert Conditions SearchSpec 32
Account	Opportunity	(None)	Conditions Sort Spec 32
Contact	Opportunity	(None)	Person Candidate Source Names 32

10 Rename inactivated user properties that are inactive:

a Query for Inactivated user properties that have user property name as

❏ Conditions Sort Spec*

❏ Convert Conditions SearchSpec*

❏ Person Candidate Source Names*

b Append "_INACTIVE" as suffix to all the names of these inactive user properties.

11 If you use any of the following, you can further improve performance by modifying local conditions for the Object-Affiliation-Rule combination that you have kept active, as shown in the following table:

■ Local Conditions based on Territory

■   Local Conditions based on Division

Object	Affiliation	Rule	Using Local Conditions Based on Territory	Using Local Conditions Based on Division
Account	Contact	Industry but not Product	In User Property Name = Person Candidate Source Names 24,	In User Property Name = Person Candidate Source Names 30,
Account	Opportunity	Industry but not Product	Change Value from "Account Industry", "Account Product" to "Account Product", ""	Change Value from "Account Industry", "Account Product" to "Account Product", ""
Account	Contact	Product but not Industry	In User Property Name = Person Candidate Source Names 24,	In User Property Name = Person Candidate Source Names 30,
Account	Opportunity	Product but not Industry	Change Value from "Account Industry", "Account Product" to "Account Industry", ""	Change Value from "Account Industry", "Account Product" to "Account Industry", ""
Account	(None)	Industry but not Product	In User Property Name = Person Candidate Source Names 19,	In User Property Name = Person Candidate Source Names 25,
Contact	(None)	Industry but not Product	Change Value from "Industry", "Product" to "Industry", ""	Change Value from "Industry", "Product" to "Industry", ""
Assets	(None)	Product but not Industry	In User Property Name = Person Candidate Source Names 19,	In User Property Name = Person Candidate Source Names 25,
Account	(None)	Product but not Industry	Change Value from "Industry", "Product" to "Product", ""	Change Value from "Industry", "Product" to "Product", ""
Contact	(None)	Product but not Industry		
Opportunity	(None)	Product but not Industry		
Opportunity	(None)	Product but not Industry		
Contact	Opportunity	GeoZone but not Postal Code	In User Property Name = Person Candidate Source Names 13,	In User Property Name = Person Candidate Source Names 18,
			Change Value from "Contact Zip", "Contact GeoZone" to "Contact GeoZone", ""	Change Value from "Contact Zip", "Contact GeoZone" to "Contact GeoZone", ""

Object	Affiliation	Rule	Using Local Conditions Based on Territory	Using Local Conditions Based on Division
Contact	Opportunity	Postal Code but not GeoZone	In User Property Name = Person Candidate Source Names 13, Change Value from "Contact Zip", "Contact GeoZone" to "Contact Zip", ""	In User Property Name = Person Candidate Source Names 18, Change Value from "Contact Zip", "Contact GeoZone" to "Contact Zip", ""
Contact	Opportunity	Industry but not Product	In User Property Name = Person Candidate Source Names 23, Change Value from "Contact Industry", "Contact Product" to "Contact Industry", ""	In User Property Name = Person Candidate Source Names 29, Change Value from "Contact Industry", "Contact Product" to "Contact Industry", ""
Contact	Opportunity	Product but not Industry	In User Property Name = Person Candidate Source Names 23, Change Value from "Contact Industry", "Contact Product" to "Contact Product", ""	In User Property Name = Person Candidate Source Names 29, Change Value from "Contact Industry", "Contact Product" to "Contact Product", ""
Account	(None)	State but not Country	In User Property Name = Person Candidate Source Names 20, Change Value from "State", "Country" to "State", ""	In User Property Name = Person Candidate Source Names 26, Change Value from "State", "Country" to "State", ""
Contact	(None)	State but not Country		
Opportunity	(None)	State but not Country		
Assets	(None)	State but not Country		
Assets	(None)	Country but not State	In User Property Name = Person Candidate Source Names 20, Change Value from "State", "Country" to "Country", ""	In User Property Name = Person Candidate Source Names 26, Change Value from "State", "Country" to "Country", ""
Account	(None)	Country but not State		
Contact	(None)	Country but not State		
Opportunity	(None)	Country but not State		

Object	Affiliation	Rule	Using Local Conditions Based on Territory	Using Local Conditions Based on Division
Contact	Opportunity	State but not Country	In User Property Name = Person Candidate Source Names 21, Change Value from "Contact State", "Contact Country" to "Contact State", ""	In User Property Name = Person Candidate Source Names 27, Change Value from "Contact State", "Contact Country" to "Contact State", ""
Contact	Opportunity	Country but not State	In User Property Name = Person Candidate Source Names 21, Change Value from "Contact State", "Contact Country" to "Contact Country", ""	In User Property Name = Person Candidate Source Names 27, Change Value from "Contact State", "Contact Country" to "Contact Country", ""
Account	Contact	State but not Country	In User Property Name = Person Candidate Source Names 22, Change Value from "Account State", "Account Country" to "Account State", ""	In User Property Name = Person Candidate Source Names 28, Change Value from "Account State", "Account Country" to "Account State", ""
Account	Opportunity	State but not Country		
Account	Contact	Country but not State	In User Property Name = Person Candidate Source Names 22, Change Value from "Account State", "Account Country" to "Account Country", ""	In User Property Name = Person Candidate Source Names 28, Change Value from "Account State", "Account Country" to "Account Country", ""
Account	Opportunity	Country but not State		

Object	Affiliation	Rule	Using Local Conditions Based on Territory	Using Local Conditions Based on Division
Account	(None)	Postal Code but not GeoZone	In User Property Name = Person Candidate Source Names 7, Change Value from "Zip", "Geo Zone" to "Zip", ""	In User Property Name = Person Candidate Source Names 12, Change Value from "Zip", "Geo Zone" to "Zip", ""
Contact	(None)	Postal Code but not GeoZone		
Opportunity	(None)	Postal Code but not GeoZone		
Assets	(None)	Postal Code but not GeoZone		
Account	(None)	GeoZone but not Postal Code	In User Property Name = Person Candidate Source Names 7, Change Value from "Zip", "Geo Zone" to "Geo Zone", ""	In User Property Name = Person Candidate Source Names 12, Change Value from "Zip", "Geo Zone" to "Geo Zone", ""
Contact	(None)	GeoZone but not Postal Code		
Opportunity	(None)	GeoZone but not Postal Code		
Account	Contact	Postal Code but not GeoZone	In User Property Name = Person Candidate Source Names 1, Change Value from "Account Zip", "Account GeoZone" to "Account Zip", ""	In User Property Name = Person Candidate Source Names 6, Change Value from "Account Zip", "Account GeoZone" to "Account Zip", ""
Account	Opportunity	Postal Code but not GeoZone		
Account	Contact	GeoZone but not Postal Code	In User Property Name = Person Candidate Source Names 1, Change Value from "Account Zip", "Account GeoZone" to "", "Account GeoZone"	In User Property Name = Person Candidate Source Names 6, Change Value from "Account Zip", "Account GeoZone" to "", "Account GeoZone"
Account	Opportunity	GeoZone but not Postal Code		

Renumbering Active User Properties So They Are Sequential

After you have finished inactivating and modifying user properties for local conditions, you must
renumber the user properties that remain active so they are sequential.

To renumber active user properties so they are sequential

1 Make a list of active user properties in the format shown in the following table.

Sequence Number	User Property Set
1	Convert Conditions SearchSpec X Conditions Sort Spec X Person Candidate Source Names X
2	Convert Conditions SearchSpec Y Conditions Sort Spec Y Person Candidate Source Names Y
3	. . .
4	. . .
n-2	Convert Conditions SearchSpec 33 Conditions Sort Spec 33 Person Candidate Source Names 33
n-1	Convert Conditions SearchSpec 34 Conditions Sort Spec 34 Person Candidate Source Names 34
n	Convert Conditions SearchSpec 35 Conditions Sort Spec 35 Person Candidate Source Names 35

NOTE: User property sets 33, 34, and 35 must be the last three in table

2 Renumber all the user properties in sequential order starting from 1, without any gaps, so the numbers of the user properties are the same as the numbers in the sequence column in your list. For example, renumber the user properties shown in the previous table as shown in the following table.

Sequence Number	User Property Set
1	Convert Conditions SearchSpec 1 Conditions Sort Spec 1 Person Candidate Source Names 1
2	Convert Conditions SearchSpec 2 Conditions Sort Spec 2 Person Candidate Source Names 2
3	. . .
4	. . .
n-2	Convert Conditions SearchSpec n-2 Conditions Sort Spec n-2 Person Candidate Source Names n-2

Sequence Number	User Property Set
n-1	Convert Conditions SearchSpec n-1 Conditions Sort Spec n-1 Person Candidate Source Names n-1
n	Convert Conditions SearchSpec n Conditions Sort Spec n Person Candidate Source Names n

Modifying Business Components to Improve Performance

You can further improve performance by modifying business components to remove unneeded fields and joins.

To modify business components to improve performance

1 Query for the Business Components listed in column 1 of the following table.

Business Components (Column 1)	Attribute (Column 2)	Join (Column 3)	Field (Column 4)
[Name] LIKE TOS*Account AND [Name] NOT LIKE TOS*Ind*Account	Industry	S_ORG_INDUST	Industry Id
		S_INDUST	Industry
TOS*Contact	Last Call Date	S_POSTN_CON	Position Last Call Date
	Primary Speciality	S_MED_SPEC	Primary Specialty
TOS*Opportunity	Sales Stage	S_STG	Sales Stage

2 If you are not using the corresponding attribute (shown in column 2) in any global condition in your implementation, then do the following:

    a Inactivate the join (shown in column 3) in the corresponding Business Component

    b Inactivate the Field (shown in column 4) in the corresponding Business Component

4 Setting Up and Running Territory Alignments

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

About Territory Alignments: Major, Intermediate, and Minor

There are three types of territory alignment:

- **Major.** Typically, you 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 all existing rules from the territories and adds the new rules from the major alignment.

- **Minor.** Typically, you run minor alignments when you are making smaller changes to a sales force that has already been aligned. To improve performance, the minor alignment processes only the minimum number of objects needed to change the current alignment, maintaining the alignment by both adding and dropping rules. You cannot change position rules in minor alignments.

- **Intermediate.** Intermediate alignments take the current alignment into account, and they process all objects based on all active rules, including Active Territory Rule (without Effective End Date or Effective End Date greater than Today) and Add and Drop Rules for Alignment, so their performance is not as fast as minor alignments. You can run intermediate alignments if you want to change position rules but do not want to run a full alignment.

You can activate minor and intermediate alignments only after at least one major alignment has been
activated. You can activate alignments only for primary hierarchies.

NOTE: Minor and intermediate alignments are available only for primary hierarchies. Only major
alignments are available for nonprimary hierarchies.

Differences Between Minor and Intermediate Alignment
Bear in mind the following differences between minor and intermediate alignment:

■ The minor alignment assigns only those objects that satisfy the rules added in the alignment.
The intermediate alignment assigns objects that satisfy rules added in the alignment plus objects
in the territories impacted by the alignment that satisfy previously existing rules.

■ Position rules can be defined for intermediate alignments but cannot be defined for minor
alignments.

■ Intermediate alignments take more time than minor alignments. Minor alignments provide the
fastest performance when you make minor territory changes.

About Rules for Siebel 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:

■ Contacts

■ Accounts

■ Assets (used only in Siebel Life Sciences)

■ Geography

■ Geo zones (also called bricks, used only in Siebel Life Sciences)

■ Products

■ Industries

Table 5 lists the types of rules you can create for territory assignment if you are aligning territories by sales representative.

NOTE: Drop action examples are only applicable to minor alignments and intermediate alignments.

Table 5.   Types of Rules for Assignment of Sales Representatives to Territories

Rule Type	Applies to...	This Type of Rule...	Examples
Direct rule	Contacts, accounts, and assets	Assigns one account, contact, or asset to one territory. **NOTE:** Direct rules are not supported for assignment of opportunities.	*Add:* Dr. Mike Adler (who is a contact) is assigned to territory A102. *Drop:* City Hospital (which is an account) is removed from territory A102.
Indirect rule	Geography, geo zones, products, and industries	Assigns the accounts, contacts, assets, opportunities or a combination thereof in a given area (postal code or geo zone), for a given product, or for a given industry, to one territory. **NOTE:** Asset assignment for geo zones is not available unless you configure Siebel Territory Management using Oracle's Siebel Tools.	*Add:* Assets in ZIP Code 07920 are assigned to territory A102. *Drop:* Accounts in geo zone 42 are removed from territory T85.
Position rule	Positions	Assigns one position to one territory.	*Add:* Assign position Sales Rep 3 to territory A102. *Drop:* Remove position Sales Rep 4 from territory A102.

If a record was added to a territory by an Indirect rule it can be dropped from this territory by the same Indirect rule only

If a record was added to a territory by a Direct rule it can be dropped from this territory by a Direct Drop rule only

If in an alignment, one record is being considered by both a direct and an indirect rule, one with an add and the other with a drop action, the rule with the add action will prevail.

There is always an OR relationship between any two rules in an alignment, irrespective of whether the rules are direct, indirect, or a combination of the two.

About Conditions in Siebel Territory Management

If you use indirect rules, you can also use conditions to limit the pool of objects (accounts, contacts, and assets) that are available for assignment by indirect rules. Table 6 describes the types of conditions.

Table 6.   Types of Conditions

Rule Type	Applies to...	This Type of Rule...	Examples
Global condition	Accounts, contacts, assets, and opportunities	Constrains the set of accounts, contacts, assets, or opportunities 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, assets, and opportunities within a given territory, geography, geo zone, or combination [2]	Further restricts the set of accounts, contacts, assets or opportunities available for assignment by indirect rules, on a per territory, geography or geo zone basis. Local conditions cannot be used to relax global conditions, only to further restrict them.	Limit the contacts in geo zone 42 to those where Last Call Date greater than 01 January 2005.

This topic presents some important points and some examples of how conditions can be used in Siebel 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 a 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 2 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
1	TM Contact	Last Call Date	>	01/01/05				AND
100	TM Account	Account Type	=	Hospital				OR
101	TM Account	Account Type	=	Clinic				AND
102	TM Account	Account Status	=	Active				AND
500	TM Contact	Job Title	=	Doctor	T2	94404		OR
501	TM Contact	Contact Type	=	Physician	T2	94404		AND
600	TM Account	Beds	<	200		07078		AND
700	TM Account	Account Type	<	250		20190		AND

Figure 2.   Global and Local Scopes

Condition Evaluation Within a Given Scope

One important difference between conditions in Siebel Territory Management and ordinary Boolean conditions is that, for a given scope, you must:

■ Place all the OR conditions first or

■ Place all the AND conditions first.

You cannot put OR conditions between AND conditions. You cannot put AND conditions between OR conditions. See .

These grouped conditions are evaluated as follows:

■ A condition that includes only ANDs is evaluated in the usual way. The entire condition is true only if all the subconditions are true.

■ A condition that includes only ORs is evaluated in the usual way. The entire condition is true if any one of the subconditions is true.

■ A condition where the ANDs precede the ORs is evaluated as if it were grouped in the following way: 1 AND 2 AND 3 AND 4 OR 5 OR 6 is evaluated as 1 AND 2 AND 3 AND (4 OR 5 OR 6).

■ A condition where the ORs precede the ANDs is evaluated as if it were grouped in the following way: 1 OR 2 OR 3 OR 4 AND 5 AND 6 is evaluated as (1 OR 2 OR 3 OR 4) AND 5 AND 6.
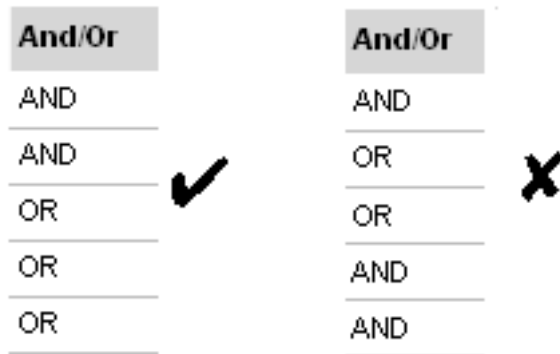

Figure 3.   Grouping Like Conditions Together Within a Scope (ANDs with ANDs; ORs with ORs)

Condition Evaluation Between Scopes

The AND operator is always automatically applied between global and local conditions. All subconditions must evaluate as true for the entire condition to be true. You cannot use the AND and OR operators between scopes, only within the same scope.

Local conditions for different scopes are handled separately. For example, consider the condition:

    A AND B AND c AND d OR e

where A and B are global conditions, c is a local condition, and d and e are also local conditions but in a different scope from c.

It is evaluated as:

    [(A AND B) AND c] OR [(A AND B) AND (d OR e)]

About Using Dates as Attributes for Conditions

Without configuration, Siebel Territory Management 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, 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.

■ Assignment Manager interprets this date 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.

About Using Divisions as Attributes of Conditions

To define alignments with different business rules that apply to different sales forces, use the
Divisions field of the Conditions list applet. This allows you to create conditions that apply to one
sales force, since divisions represent sales forces.

NOTE: You cannot combine division conditions with other types of conditions in a single condition
record. For example, you cannot specify Division = Primary Care AND Territory = XYZ in a single
condition.

About Renumbering and Inserting Conditions

To allow you to insert conditions in the list, if you change the sequence number of a condition, Siebel
Territory Management automatically renumbers all conditions that follow. This allows you to insert
new conditions in the sequence by renumbering only one condition.

For example, you have defined ten global conditions for contacts, with sequence numbers from 1 to
10. You change the sequence number of the seventh condition from 7 to 15. Siebel Territory
Management changes 8 to 16, 9 to 17, and 10 to 18. This allows you to insert new conditions with
sequence numbers between 7 and 14.

When you renumber conditions, Siebel Territory Management checks that no overlap occurs. In this
example, if there were already a condition with sequence number 17, this existing number would
overlap with the new sequence numbers that are created automatically. Siebel Territory
Management displays an error message so you cannot make this change until you have corrected
the condition that causes the overlap.

About Copying Conditions from Another Alignment

Conditions are not incremental. You must define the entire set of conditions for each alignment.

You can click the Copy From Alignment button in the Alignment Administration screen, Conditions
view to copy conditions from a previous alignment. Then you can use them as the basis of the
conditions for a new alignment and modify them as needed for the new alignment.

When you click the Copy From Alignment button, it displays a dialog box that allows you to choose
among conditions that have been created for the same territory hierarchy.

NOTE: When you copy conditions from a multidivision alignment into a single-division alignment, do
not copy division local conditions in this way.

CAUTION: When you copy conditions in this way, they overwrite any existing records in the
Conditions list.

About Versioning of Territory Alignments and Rules

You can create similar alignments with different activation dates and expiration dates. This allows
you to create different versions of rules that run at different times.

For example, you might assign all the postal codes in northern California to one representative and all the postal codes in southern California to another representative. The boundaries of the territories might change slightly at the end of the year. You can create an alignment that assigns representatives the appropriate postal codes for the year 2011, with expiration date of December 31, 2011, and an alignment that assigns the representatives the appropriate postal codes for the year 2012, with the activation date January 1, 2012.

Territory Alignments of Objects with Multiple Addresses and No 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.

Geo zone rules assign accounts and contacts only if they have addresses. If the account or contact has no address, then the geo zone rule does not consider them. In some cases this might cause alignment to fail because there is no contact or account data to process.

Effects of Different Definitions of Rules in Siebel Territory Management

The creation, modification, and expiration of rules depend on a number of factors:

■ Are the rules direct or indirect?

■ Is the alignment major, intermediate, 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)?

■ 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?

shows the effects of different definitions of rules.

Table 7.   Effects of Different Definitions of Rules

Rule Type	Alignment Type	Action	Defined in Alignment	Defined in Territory	Activation Date < Effective Start Date	Activation Date >= Effective Start Date
Direct	Major	Add	Yes	No	New territory rule	New territory rule
			Yes	Yes	New territory rule	No change to current territory rule
			No	Yes	No change to current territory rule	Sets effective end date to the activation date for the current territory rule
		Drop	Yes	No	Drops not processed	Drops not processed
			Yes	Yes	Drops not processed	Drops not processed
			No	Yes	Drops not processed	Drops not processed
	Minor or Inter- mediate	Add	Yes	No	New territory rule	New territory rule
			Yes	Yes	New territory rule	No change to current territory rule
			No	Yes	No change to current territory rule	No change to 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 to current territory rule	Sets effective end date to the activation date for the current territory rule
			No	Yes	No change to current territory rule	No change to current territory rule

Table 7.   Effects of Different Definitions of Rules

Rule Type	Alignment Type	Action	Defined in Alignment	Defined in Territory	Activation Date < Effective Start Date	Activation Date >= Effective Start Date
Indirect	Major	Add	Yes	No	New territory rule	New territory rule
			Yes	Yes	New territory rule	New territory rule
			No	Yes	No change to current territory rule	No change to 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 to current territory rule	Sets effective end date to the activation date for the current territory rule
			No	Yes	No change to current territory rule	No change to current territory rule
	Minor or Inter- mediate	Add	Yes	No	New territory rule	New territory rule
			Yes	Yes	New territory rule	No change to current territory rule
			No	Yes	No change to current territory rule	No change to 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 to current territory rule	Sets effective end date to the activation date for the current territory rule
			No	Yes	No change to current territory rule	No change to current territory rule

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 might 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. The company creates 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.

Local 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   "Excluding Addresses of Contacts, Accounts, or Assets from Territory Alignments" on page 58. By default, all address for a contact, account, or asset are included in alignments. You can flag some addresses so they are not used in the alignment.

2   "Setting Up Territory Alignment for Assignment of Sales Representatives" on page 59. The territory administrator sets up the alignment and creates the rules which determine how territories are assigned to sales representatives.

3   "Running Territory Alignments" on page 63. The territory administrator runs the alignment. The new territory assignments are created, but they do not take effect until the alignment is activated.

4   "Viewing Results of Territory Alignment Runs" on page 66. The territory administrator can review the territory alignment results and, if necessary, can go back to Step 2 to make change the territory alignment rules and to Step 3 to rerun the alignments.

5   "Reviewing and Changing Your New Territory Assignments (Sales Representative)" on page 67. Sales representatives can view the new territory assignments that apply to them, and they can change the rules to suggest changes in these assignments.

6   "Reviewing Sales Representatives Changes in Territory Assignments" on page 68. The territory administrator reviews changes suggested by sales representatives.

7   "Tracking Information About Territory Alignments" on page 68. Throughout the process, the territory administrator can track the changes that are made.

NOTE: If you are using Siebel Territory Management to align sales quotas, you must also perform the tasks described in "Viewing the Effect of a Territory Change on Sales Quotas" on page 88.

This process is a step in "Roadmap for Using Siebel Territory Management" on page 11.

Excluding Addresses of Contacts, Accounts, or Assets from Territory Alignments

By default, all the addresses for a contact, account, or asset are used in alignments. You can exclude some of these addresses from alignments by deselecting the Alignment Flag checkbox of the address record.

You can change this default by changing the user property Filter Addresses of the Target Object
Selector business service. This user property has the following options:

- **Primary.** Only primary addresses are used.

- **Alignment Flag.** Only Addresses with Alignment Flag selected are used.

- **Primary & Align Flag.** Only addresses with either Primary or Alignment Flag selected are used.

- **None.** All addresses are used.

The default value for this user property is Primary & Align Flag. The following procedure applies only
if you have not changed this default.

This task is a step in "Process of Setting Up and Running Territory Alignments" on page 58.

To exclude addresses of contacts, accounts, or assets from alignments

1 Navigate to the Contacts, Accounts, or Assets screen, List view.

2 In the list, drill down on the name of the desired contact, account, or asset.

3 In the Address field, click the select button.

4 In the Contact Addresses, Account Addresses, or Assets Addresses dialog box, deselect the
Alignment Flag checkbox for all addresses that you do not want used in alignments, and click OK.

Setting Up Territory Alignment for Assignment of Sales Representatives

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 7,
"Using Siebel Enterprise Integration Manager with Siebel Territory Management."

Before creating rules, make sure that you 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 58.

To set up a territory alignment to assign sales representatives

1 Navigate to the Siebel Territory Management screen, then the Alignments Administration view.

2 Create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	Enter the name of the territory alignment.
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.
Status	For information about this field, see "About the Status Field" on page 64.
Activation Date	Enter the 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.
Expiration Date	Optionally, enter an expiration date, used when the alignment is activated to enter an Effective End Date for the alignment rules that are activated.
Hierarchy	Select the territory hierarchy that you want to align. You will be able to activate this alignment only if this is the primary hierarchy for all territories under the alignment. You align nonprimary hierarchies only to simulate results.
Coverage	This field currently has no function and can be left blank.
Type	Select major, intermediate, or minor territory alignment. (See "About Territory Alignments: Major, Intermediate, and Minor" on page 47.)

3 Click the value in the Name field to 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 with your territory hierarchy.

5 Create rules for assigning accounts, contacts, and assets to territories by clicking one or more of the following view tabs in the lower link bar:

■ **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.

■ **Geography.** Create indirect rules that assign contacts, accounts, assets, or opportunities in specified postal codes, cities, or states territories. If you create geography rules, do not create geo zone rules.

■ **Geo Zones.** Create indirect rules that assign contacts, accounts, or opportunities in specified geo zones to territories. If you create geo zone rules, do not create geography rules.

■ **Products.** Create indirect rules that assign contacts, accounts, or opportunities for specified products to territories.

■ **Industries.** Create indirect rules that assign contacts, accounts, or opportunities for specified industries to territories.

Some fields used in these views are described in the following table.

Field	Comment
Assignment Object	If you are creating indirect rules, use this field to specify which object is assigned to the sales representatives.
	For example, you create an indirect rule for Geography to assign the Postal Code 94709 to the Territory A000. In the Assignment Object field, you choose Account. The accounts in this postal code will be assigned to the sales representative for Territory A000. Likewise, you can select Contact or Opportunity in the Assignment Object field to assign all contacts and opportunities in this postal code to the sales representative for this territory.
Affiliation Object	Select another object that is linked to the object being assigned and that is also assigned to the sales representative.
	For example, you use the Alignment Administration screen, Rules view, Contacts list to assign contacts to sales representatives. In the Affiliation Objects field, you select Opportunity. When a contact is assigned to a sales representative, the opportunities associated with that contact are also assigned to that sales representative.
Rep Action	This field determines whether the rules will be submitted to the sales representative for review. Select Include to submit this rule for review, or select Exclude if you do not want this rule submitted for review.

Field	Comment
From Territory #	This field determines which position-specific data is associated with the rule. Siebel Territory Management retrieves the primary position associated with the territory you select in this field, and it uses this as the source of position-specific data in the rule.
	The rule does not include any position-specific data if:
	■ The From Territory field is empty.
	■ The From Territory is specified, but there is no primary position associated with it.
	This field is included in all views except for the Assets view.
From Territory	Displays the name of the territory that you select in the From Territory field.

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 98.)
Copy Manual Contacts	Create Rules based on manual assignments directly from the contact, account, or asset teams. It lists all objects that have been mapped to the position

6 (Optional) Create conditions using the following substeps:

NOTE: For information about conditions, see "About Conditions in Siebel Territory Management" on page 50.

a Click the Conditions view tab.

b If you want to copy conditions from an existing alignment and use them as the basis of the conditions for this alignment, click Copy From Alignment, use the dialog box to select which alignment you want to copy the conditions from, and modify these conditions as needed for the new alignment.

c As needed, create new Condition records and complete the necessary fields. Some fields are described in the following table.

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 *global* conditions. (Global conditions apply to all objects and are not restricted to particular territories, postal codes, or geo zones.) If you edit a sequence field, subsequent sequence numbers are automatically renumbered.
Object	Choose to apply the condition to accounts, contacts, or assets.
Attribute	Choose an attribute. You can configure new attributes using Oracle's Siebel Tools. See "Configuring Additional Attributes for Territory Conditions" on page 70.
Operator	Choose one of the standard operators.
Value	Enter the value used in the condition.
Division	You can use any of these alone or combine Territory with Postal Code or Territory with Geo Zone.
Territory	
Postal Code	These are used to specify *local* conditions.
Geo Zone	
And/Or	For information about the And/Or operator, see "About Conditions in Siebel Territory Management" on page 50.

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 Siebel 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.

NOTE: While an alignment is being run, no other alignment in the same hierarchy can be run at the same time.

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 8 lists the possible values for the Status field.

Table 8.   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 the alignment has not yet been run. Additional information, such as activation date, rules, and conditions, might have been entered for the alignment record. The alignment remains In Progress until you click the Run Alignment button.	Creation
Creating Assignment Rules	Siebel 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 *Siebel Assignment Manager Administration Guide*.	Running Activation
Identifying Affected Objects	The TOS service is searching the database to identify which objects (contacts, accounts, assets, opportunities, or a combination thereof) are affected by the alignment. The purpose is to select only those objects affected and not all object in the database.	Running Activation
Request Submitted	The request for alignment has been successfully submitted to Assignment Manager.	Running
Run Completed	The Assignment Manger run has been successfully completed. 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.)	
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 8.   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	The request for alignment activation has been successfully submitted to Assignment Manager. 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.)	Activation
Alignment Run Failed	The alignment run did not complete successfully. This status can indicate some user-related issue such as: ■ 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.) It can also indicate some system-related issues, such as the server component Workflow Process Manager is not enabled.	Running
Alignment Activation Failed	The alignment activation did not complete successfully. This status can indicate some user-related issue such as: ■ No position rules ■ An alignment activation date before territory nodes effective start dates It can also indicate some system-related issues, such as the server component group Siebel Territory Management is not enabled. 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.	Activation

Running a Territory Alignment

This task is a step in the "Process of Setting Up and Running Territory Alignments" on page 58.

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, then the 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 the Siebel Territory Management screen, then the Alignments Administration view.

3   Drill down on the desired 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 8 on page 64.

6   When the status shown is Request Submitted, from the applet menu, select 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 by navigating to the Siebel Territory Management screen, then the Alignments List, and then Results view.

Viewing Results of Territory Alignment Runs

When the alignment has finished running, the territory administrator can view the results in the Results list views and, can create reports of the results for printing and electronic distribution.

This allows the administrator to decide whether to activate the results of this alignment or to change the rules and rerun the alignment before deciding to activate it.

This task is a step in the "Process of Setting Up and Running Territory Alignments" on page 58.

To view the results of a territory alignment

1   Navigate to the Siebel Territory Management screen, then the Alignments Administration view.

2   Drill down on an alignment record.

3   Click the Results view tab.

4   In the lower link bar, click Contacts, Accounts, Opportunities, Quotas, 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 *Siebel Fundamentals*. For information about customizing reports, see *Siebel Reports Administration Guide*.)

6 To submit results to sales representatives for review, in the Alignment form, click Publish Results.

Reviewing and Changing Your New Territory Assignments (Sales Representative)

After the territory administrator has run the alignment, sales representatives can look at their new territory assignments. If sales representatives want to change any assignments, they can edit the rules that determine that assignment and submit the modified rule to their reporting manager.

NOTE: Sales representatives submit the change to the position above them in the territory management hierarchy, which is usually but not necessarily their manager in the reporting structure. For more information, see "Position Reporting Structure and Territory Hierarchy" on page 14.

When sales representatives navigate to the Territories Management screen, Territories List view and display My Territories, they see only the territories that they have been assigned to by the published alignment.

This task is a step in the "Process of Setting Up and Running Territory Alignments" on page 58.

To review and change territory assignments

1 Navigate to the Inbox screen, Inbox Items List.

There is one inbox item for each alignment published.

2 Drill down on the name of the inbox item.

Siebel Territory Management displays the alignment in the Siebel Territory Management screen, then the Alignments List view.

3 In the Alignments list, drill down on the alignment whose rules you want to review.

4 Under the Rules tab for the alignment, click the Contacts, Accounts, or Geography view tab to display the rules that you want to review.

The Geography view tab displays either postal code or geo zone rules, depending on which of these the Territories Administrator created.

5 For any rule you want to change, select Exclude in the Rep Action field.

When you select Exclude in the Rep Action field, the Action value is reversed: Add is changed to Drop and Drop is changed to Add.

6 After you have made all needed changes in rules, on the Alignment Form of Alignments List view, click Submit Changes.

The Rep Action fields in these rules become read-only for the sales representative. The changed rules are submitted to the territory administrator.

Reviewing Sales Representatives Changes in Territory Assignments

The manager reviews the sales representatives' changes in territory rules and accepts them or rejects them.

This task is a step in the "Process of Setting Up and Running Territory Alignments" on page 58.

To review and change territory assignments

1 Navigate to the Territories Management screen, Alignments Administration view.

2 In the Alignments list, drill down on the alignment you want to review.

3 In the Rules view, click the Contacts, Accounts, or Geography view tab to display the rules that you want to review.

- If you want to retain any change that a sales representative has made, select the record and click Accept Changes.

- If you want to reject any change that a sales representative has made, select the record and click Undo Changes.

4 Run the alignment again, as described in "Running Territory Alignments" on page 63.

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 Siebel Territory Management screen, then the Alignments Administration view 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 58.

To keep track of alignment-specific information

1 Navigate to the Siebel Territory Management screen, then the Alignments Administration view.

2 Drill down on an alignment record.

3 Click the Activities, Attachments, or Audit Trail view tab.

Subview	Use This Subview to...
Activities	Create activities related to the alignment, assign the activity to the appropriate employee, and specify completion dates. 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.
Attachments	Attach documents related to the alignment. Example 1: After creating a report of alignment results, you attach it to the alignment record. 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.
Audit Trail	View an audit trail of changes that have been made. The fields that can be audited are the fields in the form applet in the Alignments List view. For general information about Audit Trail, see *Siebel Applications Administration Guide.*

Removing Positions from Territories

Follow the high-level steps in this procedure:

■ If you want to remove a position from a territory, or

■ If you have a position on multiple territories and you want to drop it from one of those territories.

To remove positions from territories

1 Create an intermediate alignment.

For more information, see “Process of Setting Up and Running Territory Alignments” on page 58.

2 Add all the position rules that need to be removed from this alignment, and select Drop as the action for them all.

3 Copy all the active rules for this territory node, and select Add as the action for them all.

4 Add all global conditions that were used in the last active alignment.

5 Run the alignment, and verify the results to make sure that all positions added with the action Drop have been removed from the territory node.

6 Activate the alignment

Configuring Additional Attributes for Territory Conditions

Without configuration, the Attribute field for TM_Account, TM_Asset, and TM_Contact contains a short list of attributes that can be used for conditions in Siebel 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 Oracle's Siebel Tools to add additional attributes for creating conditions.

NOTE: If joins are required for the additional attributes, the same join that is configured in the *object* business component must also be configured in the TOS*object* business components. For example, if there is a join for the Account business component, there must be the same joins for the TOS*Account business components. If there is not, the Wfprocmgr component might terminate during TOS step of the Alignment Process.

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

For information about how to configure additional attributes for territory conditions, see:

- "Making Attributes Available for Local Conditions" on page 70
- "Example of Making Attributes Available for Local Conditions" on page 71
- "Making Attributes Available for Global Conditions" on page 73
- "Example of Making Attributes Available for Global Conditions" on page 74

Making Attributes Available for Local Conditions

Use the following procedure to configure Siebel Territory Management to make attributes available for local conditions. For more information, see "Configuring Additional Attributes for Territory Conditions" on page 70.

To make additional attributes available for local conditions

1 In Oracle's Siebel Tools, create a new workflow policy column record that points to the database column on which the condition attribute is based.

2 In the Workflow Policy Object table, add a new workflow policy component column under the corresponding workflow policy component under Workflow Policy Object.

   If the Workflow Policy component has not already been created for that table, create it.

3 Create a new assignment attribute and a new assignment attribute column.

4 In the Siebel Business application, navigate to the Administration - Data screen, then the List of Values view.

5 Add a new value to the attribute list of values.

Example of Making Attributes Available for Local Conditions

The following procedure uses Industry as an example of an attribute to show how to configure Siebel Territory Management to make attributes available for local conditions. The actual values you must use depend on the actual attribute and the data model you are working with.

For more information, see "Configuring Additional Attributes for Territory Conditions" on page 70.

To make attributes available for local conditions

1   In Oracle's Siebel Tools, create a new workflow policy column record and complete the fields as follows:

Property	Example
Name	Industry
Table Name	S_INDUST
Column Name	NAME
PickList	PickList Industry
Source Field	Name

2   Add a new workflow policy component column:

   a   Navigate to the workflow policy object TM Account, workflow policy component Industry.

   b   Create a new workflow policy component column.

   c   Complete the fields as follows:

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

3   Create a new assignment attribute record and complete the fields as follows; or, if the assignment record already exists, skip to Step 4.

Property	Example
Bounded	TRUE
Data Type	Varchar
Name	Industry Name

Property	Example
Pick List	PickList Industry
Use Range	FALSE

4 For the assignment attribute you created in Step 3, create a new assignment attribute column
and complete the fields as follows:

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

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

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

NOTE: As a best practice, you should use the same name for the TM Attribute LOV value and the
corresponding Assignment Criteria in order to maintain consistency.

6 For the assignment criteria record you created in Step 5, create a new assignment criteria
attribute and complete the fields as follows:

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

7   In your Siebel Business application, in Administration - Data screen, List of Values view, 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	*Text string*	Industry Name
Language Independent Code	*Text string*	INDUSTRY NAME
Parent LIC	TM *Object Name*	TM ACCOUNT

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

Making Attributes Available for Global Conditions

Use the following procedure to configure Siebel Territory Management to make attributes available
for global conditions.

For more information, see "Configuring Additional Attributes for Territory Conditions" on page 70.

To make attributes available for global conditions

1   The first step depends on which object the condition attribute is based on:

    a   If the condition attribute is based on account, then modify the TOS*Account business
component, except for TOS Account, TOS Target Territory-Account, and TOS Target Alignment-
Territory-Account, in the following way:

        ❑   For a one-to-one attribute, add a one-to-one join to the table where the condition
attribute is stored.

        ❑   For a many-to-many attribute, add a one-to-many join to the table where the condition
attribute is stored.

        ❑   Create a business component field referring to this new join and to the column where the
condition attribute's data is stored.

    b   Similarly, if the condition attribute is based on contact, then modify the TOS*Contact business
component, except for TOS Contact, TOS Target Territory-Contact, and TOS Target Alignment-
Territory-Contact, in the following way:

        ❑   For a one-to-one attribute, add a one-to-one join to the table where the condition
attribute is stored.

        ❑   For a many-to-many attribute, add a one-to-many join to the table where the condition
attribute is stored.

        ❑   Create a business component field referring to this new join and to the column where the
condition attribute's data is stored.

c Similarly, if the condition attribute is based on opportunity, then modify the TOS*Opportunity
business component, except for TOS Opportunity, TOS Target Territory-Opportunity, and TOS
Target Alignment-Territory-Opportunity, in the following way:

- ❏ For a one-to-one attribute, add a one-to-one join to the table where the condition
attribute is stored.

- ❏ For a many-to-many attribute, add a one-to-many join to the table where the condition
attribute is stored.

- ❏ Create a business component field referring to this new join and to the column where the
condition attribute's data is stored.

2 In the Alignment Condition business component, add a user property of type Alignment Condition
Attribute, as illustrated in “Example of Making Attributes Available for Global Conditions” on
page 74.

3 In the Siebel Business application, in the Administration - Data screen, List of Values view, add
a new value to the attribute list of values.

Example of Making Attributes Available for Global Conditions

The following procedure uses Industry as an example of an attribute, to show how to configure Siebel
Territory Management to make attributes available for global conditions. The actual values you must
use depend on the actual attribute and the data model you are working with.

For more information, see “Configuring Additional Attributes for Territory Conditions” on page 70.

To make additional attributes available for global conditions

1 In Oracle's Siebel Tools, in the Alignment Condition business component, create a new user
property and complete the fields as follows:

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

2 Add a field record for the new attribute to the TOS business components related to the
assignment object.

a In this Industry example, to add the Industry field you must create two new joins, as shown in
the following table.

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

b You must also add both the Industry Id and Industry to the TOS*Account business components,
as shown in the following table.

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-Position-Territory-Account

❏ TOS Target Alignment-Position-Territory-Country-Account

❏ TOS Target Alignment-Position-Territory-Geo Zone-Account

❏ TOS Target Alignment-Position-Territory-Industry-Account

❏ TOS Target Alignment-Position-Territory-Postal Code-Account

❏ TOS Target Alignment-Position-Territory-Product-Account

❏ TOS Target Alignment-Position-Territory-State-Account

❏ TOS Target Alignment-Territory-Account

❏ TOS Target Alignment-Territory-Country-Account

❏ TOS Target Alignment-Territory-Geo Zone-Account

❏ TOS Target Territory-Industry-Account

❏ TOS Target Territory-Postal Code-Account

❏ TOS Target Territory-Product-Account

❑   TOS Target Territory-State-Account

NOTE: You can display a complete list of the TOS*Account business components to add by querying in the Siebel Tools Business Components view for the string *TOS*Account.*

3   In your Siebel Business application, in Administration - Data screen, List of Values view, 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	*Text string*	Industry Name
Language Independent Code	*Text string*	INDUSTRY NAME
Parent LIC	TM *Object Name*	TM ACCOUNT

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

Troubleshooting Territory Alignments

This topic provides guidelines for resolving territory alignment problems.

To resolve the problem, look for it in the list of Symptoms or Error messages in Table 9.

Table 9.   Resolving Territory Alignment Problems

Symptom or Error Message	Diagnostic Steps or Cause	Solution
Another alignment for hierarchy "H3" is running or activated. Please try again later. (SBL-SVC-00300)	This error probably occurs because someone ran an alignment previously and it failed.	See "Resolving the Error: Another Alignment Is Running or Activated" on page 76.
No records exist for Request Id XXX.(SBL-ASG-50404)	This error probably occurs because dates in other fields are later than the activation date of the alignment.	See "Resolving the Error: No Records Exist" on page 77

Resolving the Error: Another Alignment Is Running or Activated

This task is part of "Troubleshooting Territory Alignments" on page 76.

This topic describes how to resolve the following error message generated by Siebel Territory Management:

Another alignment for hierarchy "H3" is running or activated. Please try again later. (SBL-SVC-00300)

This error is probably generated because someone ran an alignment on this hierarchy previously, and it failed. Siebel Territory Management locked the alignment while running it, and it did not unlock it because the alignment failed. Because it remains locked, you cannot run another alignment on this hierarchy.

If this problem is the cause of the error message, you can resolve it using the following procedure.

To resolve the error "another alignment is running or activated"

1 Cancel queued workflows:

    a Navigate to the Administration - Server Management screen, then to the Jobs view.

    b Check the tasks in the Jobs list to see whether any is a WfprocMgr (workflow process manager) task and has the status Queued.

    c Select and cancel these queued tasks.

    d Restart the Workflow Process Manager server component or the Siebel Server, as necessary to to remove these queued tasks from the list.

2 Remove failed alignments:

    a Navigate to the Territories Management screen, Alignments Administration view.

    b Select alignments in the list that have statuses indicating they have failed, and click Delete.

Resolving the Error: No Records Exist

This task is part of "Troubleshooting Territory Alignments" on page 76.

This topic describes how to resolve the following error message generated by Siebel Territory Management:

No records exist for Request Id XXX. (SBL-ASG-50404)

This error probably occurs because dates in the following fields are later than the activation date of the alignment:

■ Effective Start Date in the Postal Code view for the territory (if you use this view)

■ Effective Start Date in the Positions view for the territory

■ Effective Start Date in the Associate Territory to Hierarchy view for the territory

The value in the Activation Date field of the alignment in the Alignment view must be later than the value in these three fields.

To resolve the error "No records exist"

1 Navigate to the Postal Code view for the territory if you used it.

2 If the Effective Start Date for any postal code in the list is later than the activation date of the alignment, change it.

3 Navigate to the Positions view for the territory.

4 If the Effective Start Date for any position in the list is later than the activation date of the alignment, change it.

5 Navigate to the Associate Territory to Hierarchy view for the territory.

6 If the Effective Start Date for any territory in the list is later than the activation date of the alignment, change it.

5 Sales Quotas and Siebel Territory Management

This chapter describes how to create sales quotas and use Siebel Territory Management to assign the quotas to sales representatives. It includes the following topics:

- "About Sales Quotas and Siebel Territory Management" on page 79
- "Process of Creating and Aligning Sales Quotas" on page 79
- "Viewing the Effect of a Territory Change on Sales Quotas" on page 88

About Sales Quotas and Siebel Territory Management

A quota is the target amount or number of sales the sales representative is expected to achieve. Quotas are often based on the expected performance within the sales representative's territory.

You can use Siebel Territory Management to align sales quotas, in addition to using it to align territories. You can assign sales quotas based on accounts, contacts, postal codes, or geo zones.

The amount of the quota is defined at the customer level. For example, you are defining sales quotas by account. You have 500 hospitals that are your accounts. You have a specific drug that you sell to hospitals that you want to define a sales quota for. To do this:

- You define the sale quota for sales of that drug to each hospital for each period. The period could be month or quarter.

- The total national sales quota for that drug is the sum of the sales quotas you defined for all the individual hospitals. You get this amount by rolling up the sales quotas that you defined for all the individual hospitals for all the periods. The total sales quota could be for a year, so Siebel Territory Management would roll up the quotas for all the hospitals for all the quarters or months in that year.

- The sales quota for each territory is a function of which hospitals are in each territory. You get these amounts by doing a territory alignment for the territory hierarchy that you associated with the sales quota. The sales representative for each territory is assigned the sales quota for that territory.

This example shows what happens when you define quotas for accounts, and Siebel Territory Management works in a similar way when you define quotas for contacts, postal codes, or geo zones.

Process of Creating and Aligning Sales Quotas

To create and align sales quotas, perform the following tasks:

1 "Setting Up Territories and Territory Hierarchies for Sales Quota Alignment" on page 80

2 "Creating the Sales Quota Record" on page 80

3 "Defining Sales Quotas" on page 81

4 "Checking and Publishing the Sales Quotas" on page 86

5 "Calculating the Sales Quotas for Management" on page 86

This process is a step in "Roadmap for Using Siebel Territory Management" on page 11.

Setting Up Territories and Territory Hierarchies for Sales Quota Alignment

Before you set up sales quotas, you must set up territories and territory hierarchies.

If you have already done this to align sales representatives to territories, you can continue with the rest of the process of creating and aligning sales quotas.

If you have not yet done this, you must begin by performing the tasks described in "Process of Setting Up Siebel Territory Management" on page 15 before you can go on to create and align sales quotas.

This task is a step in "Process of Creating and Aligning Sales Quotas" on page 79.

Creating the Sales Quota Record

The first step in defining the sales quota is to create the sales quota record. This quota includes:

■ A product or product line that this is the quota for. For example, this might be a quota for the sale of the X23 laptop computer or for the entire product line of computers.

■ A unit of measure for the quota, such as revenue from sales or number of units sold.

■ The value of the quota, which is the amount that should be sold. For example, if the unit of measure is Units and the quota value is 1000, then the sales quota is 1000 units sold. The value is not entered in the Sales Quota record but is rolled up from amounts entered in period records.

This task is a step in "Process of Creating and Aligning Sales Quotas" on page 79.

To create the Sales Quota record

1   Navigate to the Administration - Sales Quota screen, Quotas Administration view.

In the Quotas Administration list, add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comment
Name	Enter a name for this sales quota.
Period Type	Select the type of period that this quota applies to, such as year or month.
Quota Period	Select the actual period that this quota applies to. The options available depend on the period type that you selected. For example, if you selected month as period type, you could select January 2007 or February 2007 as the quota period.
Quota Value	Displays the rolled up value for the quota, after you have done the roll up.
Territory Hierarchy	Select the Territory Hierarchy that this quota will be applied to. Sales representatives for the territories in this hierarchy will be assigned
Split Method	Select the split method: ■ If you want to enter quotas for accounts and split them among contacts for that account, select Account Quota Split. For more information, see "Defining Sales Quotas for Accounts" on page 83. ■ If you want to enter quotas for contacts and split them among accounts for that contact, select Contact Quota Split. For more information, see "Defining Sales Quotas for Contacts" on page 84.
Product	Select the product that this quota applies to. (Enter a value either for Product or for Product line, but not for both.)
Unit of Measure	Select the unit of measure for the quota. Options are: ■ **Calls.** The quota specifies how many customer calls the sales representatives should make. ■ **Revenues.** The quota specifies the money value of the sales. ■ **Units.** The quota specifies the number of units sold.
Product Line	Select the product line that this quota applies to. (Enter a value either for Product or for Product line, but not for both.)

Defining Sales Quotas

To define the sales quota, you:

■   Define the customers that this sales quota applies to by entering a list of accounts, contacts, postal codes, or geo zones.

■ For each account, contact, postal code or geo zone that you entered, define the sales quota for each period.

■ Roll up the quotas, so the total of the quotas you defined for all the periods are entered in the Sales Quota record.

NOTE: When you click the Rollup Quota button in any of the following procedures, the Siebel Business application adds up the amount from all rules across rule types (Account, Contact, Postal Code, and GeoZone rules) and it displays in the Quota Value field in the header form.

.

This task is a step in .

Defining Sales Quotas for Postal Codes or Geo Zones

To define sales quotas by postal code or geo zone, enter the appropriate values in the Postal Codes or Geo Zones view.

To define sales quotas by postal code or geo zone

1 In the Quotas Administration list, drill down on the name of the sales quota that you want to align.

2 Click the Postal Code or Geo Zone view tab.

3 In the Postal Code or Geo Zone list, add new records and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Postal Code or Geo Zone	Select a postal code or geo zone that this is the sales quota for.
Amount	Do not enter a value here. This field displays the totals of the amounts you will enter in the Quota field of the periods list in Step .

For each postal code or Geo Zone, add new record to the Postal Code Quota Periods list or to the Geo Zones Quota Periods list for all the periods that you are defining a quota for, and complete the necessary fields. Some fields are described in the following table.

4

Field	Comments
Period	Select a period. The periods that are available to select depend on the Quota Period that you selected in the Sales Quota record.
Quota	Enter the sales quota for this postal code or geo zone for this period.

5 After you have entered quotas for all periods for all postal codes or Geo Zones, in the Quotas form, click Rollup Quota.

The amounts for all the period quotas for each postal code or Geo Zone are rolled up into the Amount field of the Postal Code or Geo Zone records. The total amount for all the postal codes or Geo Zones is rolled up into the Amount field of the Sales Quota record.

Defining Sales Quotas for Accounts

Defining sales quotas for accounts is similar to defining sales quotas for postal codes or geo zones, with one difference. You can split the sales quota for the account among contacts at that account to create sales quotas for the contacts.

To define sales quotas by account

1 In the Quotas Administration list, drill down on the name of the sales quota that you want to align.

2 Click the Accounts view tab.

In the Accounts list, add new records and complete the necessary fields. Some fields are described in the following table.

3

Field	Comments
Account	Select an account that you want to define a sales quota for.
Amount	Do not enter a value here. This field displays the totals of the amounts you will enter in the Quota field of the periods list in Step .

For each account, add new records to the Account Quota Periods list all the periods that you are defining a quota for, and complete the necessary fields. Some fields are described in the following table.

4

Field	Comments
Period	Select a period. The periods that are available to select depend on the Quota Period that you selected in the Sales Quota record.
Quota	Enter the sales quota for this account for this period.

Optionally, if you want to split the quota among contacts at the account, for each period record, add new records to the Affiliated Contacts list and complete the necessary fields. Some fields are described in the following table.

5

Field	Comments
Last Name	Select a contact associated with this account.
Quota Split %	Enter the percent of the account quota that will be assigned to this contact.
Quota Split Amount	Displays the amount of the account quota given to this contact, calculated by multiplying the Quota Split % times the Quota amount in the Account Quota Periods record.
Contact Split %	Displays the percent of the affiliated contact's quota that will be assigned to this account.
Contact Split Amount	Displays the amount of the affiliated contact's quota assigned to this account.

6 After you have entered quotas for all periods for all accounts, in the Quotas form, click Rollup Quota.

The amounts for all the period quotas for each account or Geo Zone are rolled up into the Amount field of the Account or Geo Zone records. The amounts for all accounts are rolled up into the Quota Value field of the Sales Quota record.

Defining Sales Quotas for Contacts

Defining sales quotas for contacts is similar to defining sales quotas for accounts. If the same contact is at several accounts, you can split the sales quota among those accounts to create sales quotas for the contacts at each account. For example, if one doctor is on the staff of several hospitals, you can define sales quotas for that doctor and split it among the hospitals to get a separate quota for the amount that should be sold to that doctor at each of those hospitals.

To define sales quotas by contact

1 In the Quotas Administration list, drill down on the name of the sales quota that you want to align.

2 Click the Contacts view tab.

3 In the Contacts list, add new records and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Contact	Select a contact whom you want to define a sales quota for.
Amount	Do not enter a value here. This field displays the totals of the amounts you will enter in the Quota field of the periods list in Step .

For each contact, add new records to the Contact Quota Periods list for all the periods that you are defining a quota for, and complete the necessary fields. Some fields are described in the following table.

4

Field	Comments
Period	Select a period. The periods that are available to select depend on the Quota Period that you selected in the Sales Quota record.
Quota	Enter the sales quota for this account for this period.

5 Optionally, if you want to split the quota among different accounts for this contact, for each period record, add new records to the Affiliated Accounts list and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	Select an account associated with this contact.
Quota Split %	Enter the percent of the contact quota that will be the quota for the contact at this account.
Quota Split Amount	Displays the amount of the quota for this contact at this account, calculated by multiplying the Quota Split % times the Quota amount in the Contact Quota Periods record.
Account Split %	Displays the percent of the affiliated account's quota that will be assigned to this contact.
Account Split Amount	Displays the amount of the affiliated account's quota assigned to this contact.

6 After you have entered quotas for all periods for all contacts, in the Quotas form, click Rollup Quota.

The Quota amounts for all the period quotas for each contact are rolled up into the Amount field of the Contacts records. The amounts for all contacts are rolled up into the Quota Value field of the Sales Quota record.

Checking and Publishing the Sales Quotas

After you have defined the sales quotas and rolled up the amounts, check the total sales quota to make sure it is what you want. If it is not, make necessary adjustments.

Once the total sales quota is correct, you publish it to assign the sales quota to the territories in the Territory Hierarchy that you associated with the Sales Quota record.

When you click Publish, to assign the sales quota to the territories, Siebel Territory Management must

■ **Check Dates.** Siebel Territory Management compares the sales quota periods with the start date and end date of the territory rules. If an entire sales quota period is within the start date and end date of a rule, Siebel Territory Management assigns the entire quota to the territory specified by the rule. If only part of a sales quota period is within the start date and end date of a rule, Siebel Territory Management assigns a pro rated share of that quota to the territory specified by the rule.

■ **Check Accounts.** One account might be in multiple territories. If so, Siebel Territory Management assigns the quota for the account to those territories. The percentage of the total quota assigned to each account depends on the value in the Allocation Percentage field in the Territories Administration Quotas, Accounts, Contacts, Postal Code, or Geo Zone view.

This task is a step in "Process of Creating and Aligning Sales Quotas" on page 79.

To check and publish the sales quota

1   After rolling up the quota, check the value in the Quota Value field of the Quotas form.

2   If this is not the total sales quota that you want, repeat the steps in "Defining Sales Quotas" on page 81, changing the period quotas to change the total quota value.

3   When the total Quota Value is correct, click Publish.

Calculating the Sales Quotas for Management

After publishing the sales quotas for sales representatives, calculate the sales quotas for the district managers and regional managers of those sales representatives. The calculated quotas for managers is a roll-up of the quotas of their reports.

When you click the Calculate button for a territory, Siebel Territory Management calculates the quota amounts for that territory by adding the quota values for all quota rules.

NOTE: If you want to use an adjusted quota in place of the calculated quota, you must set the Adjusted Amt Rollup value at the business component to Y, using Siebel Tools. Enter the value in the Adjusted Quota field described in Step 4 on page 87.

This task is a step in "Process of Creating and Aligning Sales Quotas" on page 79.

To calculate sales quotas for management

1   Navigate to the Siebel Territory Management screen, then the Territories Administration view.

2 Select the record for the appropriate territory.

3 In the Territory form, Click Calculate.

4 To understand the result, view the values in the fields shown in the following table.

Applet	Field	Comment
Period Quotas	Base Amount	The value from Publish Quota in Quota Administration.
	Net Amount	The value after applying the credit allocation percentage described earlier.
Territory Quota Rules	Base Quota	The sum of the base amounts from the Period Quotas list.
	Calculated Quota	The sum of the net amounts from the Period Quotas list.
	Adjusted Quota	If you want to use an adjusted quota that overrides calculated quota, enter the adjusted quota here. **NOTE:** To use this field, you must configure Siebel Territory Management using Siebel Tools, as described earlier in this topic.
	Overall Calculated Quota	The sum of the calculated quotas of all subordinate territories.
	Total Quota	The sum of the values in the Calculated Quota and Overall Calculated Quota fields.
Territory Quota	Rollup Amount	The sum of the calculated quotas from the Territory Quota Rules list.
	Overall Calculated Quota	The sum of the rollup amounts from all subordinate territories, including Account, Contact, Postal Code, and GeoZone rules.
	Total Quota	The sum of the values in the Rollup Amount and Overall Calculated Quota fields.
Territory Applet	Total Quota	The sum of all quotas from the Territory Quota list that are valid on the current date.

The quota values for each quota rule are the sum of all the net amount values from the territory quota periods, considering the validity of each rule, as follows:

■ The net amount on the Period Quota applet is the sum of the Credit Allocation records valid between the period start date and period end date, calculated as follows:

Net Amount for that Period = (Base Amount * ((CrdtAllocEndDt1 - CrdtAllocStartDt1)/ (PeriodEndDt - PeriodStartDt)) * CreditAllocation%) + (Base Amount * ((CrdtAllocEndDt2 - CrdtAllocStartDt2)/(PeriodEndDt - PeriodStartDt)) * CreditAllocation%) + . . .

■ If there is no credit allocation defined, then the calculation assumes a credit allocation of 100%.

■ If a rule is not valid for the entire period mentioned in the territory period quota, then the quota is the net amount achievable for the length of time that the rule is valid, assuming 100% Credit Allocation, calculated as follows:

Net Amount * ((RuleEndtDt - RuleStartDt) /(PeriodEndDt - PeriodStartDt))

After the calculation, the Territory record shows the current sales quota, which depends on whether the period associated with a sales quota is valid for the current date.

Viewing the Effect of a Territory Change on Sales Quotas

After you have set up and aligned sales quotas, as described in "Process of Creating and Aligning Sales Quotas" on page 79, changes that you make in territory rules can affect these sales quotas, because the sales quotas are assigned to sales representatives based on territories.

You can check the effect of a territory alignment on sales quotas before activating the new territory alignment.

This task is a step in "Roadmap for Using Siebel Territory Management" on page 11.

Associating the Quota with an Alignment
Before you run the alignment, you must associate the quota with the alignment.

To associate a quota with an alignment

1   Navigate to the Siebel Territory Management screen, then the Alignments Administration view.

2   Drill down on the desired alignment.

3   Click the Quotas view tab.

4   In the link bar, click Contacts, Accounts, Postal Codes, or Geo Zones, depending on which of these was used as the basis of the sales quota.

5   In the Quotas list, select the quotas that you want to associate with this alignment.

Viewing the Effect of the Alignment on Quotas
After you run the alignment, check the effect it has on quotas, so you can evaluate this result before you activate the alignment.

To view the effect of the alignment on quotas

1   Navigate to the Siebel Territory Management screen, then the Territories Administration view.

2   Drill down on the desired territory.

3   Click the Quotas view tab.

4   In the link bar, click Contacts, Accounts, Postal Codes, or Geo Zones, depending on which of
these was used as the basis of the quota.

5   In the Territory Contact Quota Rules list, select a rule.

6   In the Credit Allocation list, and the Period Quotas list, view what the quotas are after the
alignment using this rule.

6 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 alignments. It includes the following topics:

- "About Activating and Maintaining Territory Alignments" on page 91
- "About the Special Behavior for Position-Specific Contact Data in Siebel Life Sciences" on page 92
- "Scenario for Activating and Maintaining Territory Alignments" on page 93
- "Activating Territory Alignments" on page 94
- "Rolling Back Major Territory Alignment Activations" on page 95
- "Combining Territory Alignments" on page 96
- "Generating Reporting Structures Based on Territory Hierarchy" on page 97
- "Viewing and Editing Rules for Individual Territories" on page 98
- "Using the Periodic Runs Workflow to Maintain Territory Alignments" on page 99
- "Configuring the Periodic Runs Workflow to Use the Timestamp Filter" on page 102
- "Tasks for Working with Territory Hierarchies" on page 109

About Activating and Maintaining Territory Alignments

About Activating Territory Alignments

When you activate an alignment, Siebel 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 opportunity, 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 on the rollout date if the activation date is in the past).

You can activate alignments only where all territories have the same primary hierarchy as the alignment hierarchy. Territories can be associated with multiple territory hierarchies so you can run alignments to simulate results, but Siebel Territory Management does not allow you to activate alignments for nonprimary hierarchies. The Siebel Territory Management application requires that you use only one primary hierarchy for alignment activation for a given group of Territories. The primary hierarchy that you defined for each territory is used to validate that all territories in the alignment have the same primary hierarchy as the alignment hierarchy. The alignment can be activated only if these hierarchies are the same.

Table 10 describes two slightly different activation behaviors, depending on whether the activation
date is in the future or the past.

Table 10.   How Activation Date Affects Activation Behavior

If the Activation Date Is . . .	Then Siebel Territory Management . . .	And, the Alignment Status Is . . .
In the future	Creates the rules for the territories and then schedules a workflow process to implement and roll out the rules on the activation date.	Scheduled, until the activation date Active, after the activation date
Present or in the past	Creates the rules for the territories and immediately runs the workflow process to roll out the rules.	Active

About Maintaining Territory Alignments

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

NOTE: The preferred method of copying position-specific data is by using the From Territory # field
when defining territory rules, as described in "Setting Up Territory Alignment for Assignment of Sales
Representatives" on page 59. The method described here is retained for backward compatibility.

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
    values in the Rep Specialty, Last Call Date and Primary Address fields are not lost but are
    transferred.

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.

NOTE: If existing data already includes more than one representative, position-specific data is copied from the primary position of the territory.

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 might 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 must 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 is 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 that 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.

Activating Territory Alignments

After you successfully run and review your alignment (as described in Chapter 4, "Setting Up and 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.

NOTE: While an alignment is being activated, no other alignment in the same hierarchy might be activated at the same time.

This task is a step in "Roadmap for Using Siebel Territory Management" on page 11.

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 Siebel Territory Management screen, then the 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 the Siebel Territory Management screen, then the Alignments Administration view.

4 Enter or confirm the activation date.

5 Click Activate Rules.

6 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 8 on page 64.

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

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. You can only roll back an alignment if the alignment's status is Scheduled.

When a major, intermediate, or minor 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.

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.

If a territory is associated with multiple hierarchies and the same rule is being updated by more than one hierarchy, the roll back begins with the last scheduled alignment and continues rolling back all scheduled alignments until it reaches the earliest scheduled alignment. If the Siebel Territory Management application finds that either manual or alignment changes were made to any of the territories included in the alignment being rolled back, Siebel Territory Management stops the roll back process and displays an error message saying you must undo the change before performing this rollback. This allows roll back to work with multiple future versions of alignments, as described in "About Versioning of Territory Alignments and Rules" on page 53.

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

To roll back a scheduled territory alignment activation

1 Navigate to the Siebel Territory Management screen, then the Alignments Administration view.

2 Select an alignment record where the status is Scheduled.

3 From the applet menu, select Roll Back Activation.

Combining Territory Alignments

After doing a major realignment, you might have to make minor updates to the territory alignment. Rather than changing the existing alignment and running the entire alignment again, you might create new alignment records that just contain the few new changes that have to be made at the time. You might do this several times before doing the next major realignment. As a result, when it comes the time for the next realignment, no single record exists that reflects the current alignment.

You can combine alignments to create a single record that represents the current alignment. You can combine the last major realignment and all the minor and intermediate alignments done since then to create a single alignment record representing the current situation.

The Siebel Territory Management application combines these alignments based on the sequence number in the dialog box it displays. The sequence affects the final outcome, since rules in later records override rules in earlier records. Generally, it is recommended to keep the default sequence in the dialog box, which is based on activation date in which the alignments were actually run in the past. If you have some special reason for doing so, you can change the sequence numbers in the dialog box.

To combine territory alignments

1 Navigate to the Siebel Territory Management screen, then the Alignments Administration view.

2 In the alignments list, multiselect all the alignment records that you want to combine.

3 From the alignments list menu, select Combine Alignments.

TIP: You can use Alt-C instead of selecting this menu option.

4 In the dialog box, change sequence numbers of alignments if necessary, and click Combine.

In the newly created Alignment record, complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	Enter the name of the new combined territory alignment.
Hierarchy	Select the territory hierarchy that you want to align.
Status	The status is In Progress when the record is created. For information about this field, see "About the Status Field" on page 64.
Type	Select Major. (See "About Territory Alignments: Major, Intermediate, and Minor" on page 47.)
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.

Field	Comments
Activation Date	Enter the date in the future that you want the new alignment to take effect, that is, to be rolled out to all the sales representatives in the hierarchy (or in the division and hierarchy combination).
	Even though this combined alignment replicates the current assignments, you must enter an activation date, as you do for other alignments.
Coverage	Indicate whether territory coverage is nationwide or sparse (for example, in metropolitan areas only).

5 The alignment rules are created automatically by looping through the rules for all the alignments that you combined.

Generating Reporting Structures Based on Territory Hierarchy

This procedure is optional. Perform it only if you want to change the parent positions for the positions belonging to the divisions in the hierarchy. This option might or might 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 Siebel Territory Management to review their new assignments.

Siebel Territory Management sets the parent positions by using the primary position currently assigned to the parent territory. If parent territory or primary position for parent territory does not exist, Siebel Territory Management does not set the parent position.

NOTE: Activation of new alignments might expire existing position rules from the territory, but the primary position of the territory will not be updated to the position in the active position rule. You have to set the primary position of the territory manually to the position in the active position rule.

To generate a reporting structure based on territory hierarchy

1 Make sure the position in the active position rule is the same as the primary position for each territory in the hierarchy:

a Navigate to the Siebel Territory Management screen, then the Territories Administration view.

b Drill down on the Territory # field.

Rules for that territory appear.

c Click the Positions tab under the Rules tab to display position rules.

    d   Make sure that the position listed in the active rule is the same as the Primary Position in the form above, if you want that position to be given the parent position specified in the rule.

    e   If there is more than one active position rule, one of the positions in these rules can be selected as the primary position of the territory.

2   Generate the reporting hierarchy:

    a   Navigate to the Siebel Territory Management screen, then the Territory Explorer view.

    b   In the hierarchy pane, select a hierarchy.

       The Generate Reporting Hierarchy button becomes visible.

    c   Click Generate Reporting Hierarchy.

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

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 (as described in "Using the Periodic Runs Workflow to Maintain Territory Alignments" on page 99), 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 (to view 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.

To view or edit rules for individual territories

1   Navigate to the Siebel Territory Management screen, then the 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.

> **CAUTION:** 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	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:
	
	■ 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:
	   ■ 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:
	   ■ 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 the Periodic Runs Workflow 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 the alignment, you set up the Periodic Runs workflow to run the alignment rules in batch mode at regular intervals, for example, once a day or once a week.

This workflow:

■ Converts global conditions from a dummy alignment into a TOS search specification and invokes the TOS service.

■ Passes the resulting filtered object ids to an Assignment Manager Batch job.

■ Finds the Assignment Manager rule group based on the Hierarchy and Division, and uses the same rule group while invoking the Assignment Manager Batch job.

As a result:

■ Newly added objects are assigned to the appropriate positions.

■ Changed objects that no longer satisfy the global conditions are dropped.

Before you can run this workflow, you must configure the Siebel application as described in "Configuring the Periodic Runs Workflow to Use the Timestamp Filter" on page 102

This task is a step in "Roadmap for Using Siebel Territory Management" on page 11.

Running the Periodic Runs Workflow without the Time-Stamp Filter

If you run the Periodic Runs workflow without the time-stamp filter, it processes all the data. For faster performance, you can run the Periodic Runs workflow with the time-stamp filter, as described below.

To run the Periodic Runs workflow without the time-stamp filter

1 Activate the workflow Alignment - Periodic Runs.

2 Create a new alignment with the same global conditions as previous active alignment.

This dummy alignment need not have rules. It must use the same Hierarchy and Division combination as the previous active alignment. It must be an intermediate alignment.

NOTE: The dummy alignment must contain all the global conditions from the most recent active alignment in the hierarchy and division. The activation date of the dummy alignment must be either the current date or earlier than the activation date of the most recent active alignment in the hierarchy and division.

3 Get the row Id of this alignment.

4 Create a batch job for Workflow Process Manager with the parameters shown in the following table.

Parameter	Value
Workflow Process Alignment	Periodic Runs
Object Id	The alignment ID you got in Step 3

5 Submit the job

You can create the job as repeating instance, for example at every 24 hour interval. Each time the job is run, all the new account, contact, asset, and opportunity records will be assigned based on the rules and local conditions in the previous active alignment.

Running the Periodic Runs Workflow with the Time-Stamp Filter

If you run the Periodic Runs workflow with the time-stamp filter, it processes only the incremental data more recent than the time stamp. Because it does not process all the data, it takes less time to run.

To run the Periodic Runs workflow with the time-stamp filter

1 Activate the workflow Alignment - Periodic Runs.

2 Create a new alignment with the same global conditions as previous active alignment.

This dummy alignment need not have rules. It must use the same Hierarchy and Division combination as the previous active alignment. It must be an intermediate alignment.

NOTE: The dummy alignment must contain all the global conditions from the most recent active alignment in the hierarchy and division. The activation date of the dummy alignment must be either the current date or earlier than the activation date of the most recent active alignment in the hierarchy and division.

3 Get the row Id of this alignment.

4 Navigate to the Admin-Business Service screen, then the Simulator view.

5 Create a new record with the values shown in the following table.

Field	Value
Service Name	Server Requests
Method	Submit Request

6 Provide input for the record.

a Create an .xml file with the following content:

```
<PropertySet

 Method="RunProcess"

 Component="WfProcMgr"

 Mode="DirectDb"

><PropertySet

 Object Id="88-2ARGD"

 ProcessName="Alignment - Periodic Runs"
```

```
 LastModified Timestamp ="5/11/2010 04:42:58"

></PropertySet

></PropertySet

Object Id = <Alignment Id of Dummy Intermediate alignment>

LastModified Timestamp = <A timestamp after which the objects are modified have
to be considered for assignment/de-assignment>
```

NOTE: LastModified Timestamp must be in the format MM/DD/YYYY HH:mm:ss using a 24hr
clock.

b In the business service input applet, select Load From File, and select this .xml file.

Configuring the Periodic Runs Workflow to Use the Timestamp Filter

You can use the periodic runs workflow to maintain territory alignments, as described in
, but first you must perform the
following configuration tasks:

-

-

-

Modifying the Periodic Runs Workflow

Use this procedure to modify the Periodic Runs workflow.

To modify the Periodic Runs workflow

1 Prepare to modify the workflow:

a In Siebel Tools, connected to the Siebel server database, navigate to the Object Explorer and
then Workflow Processes.

b Query for the workflow Alignment - Periodic Runs.

c Lock the project.

d Click Revise.

2 Create process properties.

a In the Object Explorer, open the child workflow process properties.

b Create a process property with the values shown in the following table.

Field	Value
Name	GoToEnd
In/Out	In/Out
Default String	FALSE
Data Type	String

c Create a second process property with the values shown in the following table.

Field	Value
Name	LastModified Timestamp
In/Out	In/Out
Data Type	String

3 Right-click and select Edit Workflow Process.

4 Edit the arguments of the step INVOKE TOS:

a In the Designer Window, select the step INVOKE TOS, and select Show Input Arguments.

b Enter an input argument with the values shown in the following table.

Field	Value
Input Argument	Alignment Id
Type	Process Property
Property Name	Object Id

c Enter an input argument with the values shown in the following table.

Field	Value
Input Argument	BatchAssignment
Type	Literal
Value	TRUE

d Enter an input argument with the values shown in the following table.

Field	Value
Input Argument	LastModified Timestamp
Type	Process Property
Property Name	LastModified Timestamp

5 Edit the arguments of the step Post TOS Process:

a In the Designer Window, select the step Post TOS Process, and then in the MultivalueProperty Window, select Input Arguments.

b Enter an input argument with the values shown in the following table.

Field	Value
Input Argument	ActiveAlignmentRowId
Type	Process Property
Property Name	Alignment Id

c Enter an input argument with the values shown in the following table.

Field	Value
Input Argument	Alignment Id
Type	Process Property
Property Name	Object Id

d Enter an input argument with the values shown in the following table.

Field	Value
Input Argument	LastModified Timestamp
Type	Process Property
Property Name	LastModified Timestamp

e In the Designer Window, select the step Post TOS Process, and then in the MultivalueProperty Window, select Output Arguments.

f Enter an output argument with the value shown in the following table.

Field	Value
Property Name	GoToEnd
Type	Output Argument
Output Argument	GoToEnd

6 Add a new decision step:

a Insert a decision step between the steps Post TOS Process and Load Balancer/AM, connecting the default connector to the step Update Alignment Status to Splitting Tasks, and connecting the condition connector to the step Data Cleanup.

b Select the condition connector, right click it and select Edit Conditions, and then add a condition with the values shown in the following table.

Field	Value
Compare To	Process Property
Object	GoToEnd
Operation	All Must Match (Ignore Case)
Value	TRUE

7 Edit the arguments of the step Load Balancer/AM:

a In the Designer Window, select the step Load Balancer/AM, right click it, and select Show Input Arguments.

b Modify the input argument shown in the following table.

Field	Value
Input Argument	Alignment Id
Type	Process Property
Property Name	Object Id

8 Edit the arguments of the step Data Cleanup:

a In the Designer Window select the step Data Cleanup, right click it, and select Show Input Arguments.

b Modify the input argument shown in the following table.

Field	Value
Input Argument	Alignment Id
Type	Process Property
Property Name	Object Id

9 From the File menu, select Save All.

10 Exit from the designer.

11 Click the Publish button.

12 Activate the workflow:

a In the Siebel application, navigate to the Admin-Business Process screen then the Workflow Deployment view.

b Activate the workflow named Alignment - Periodic Runs.

Modifying the TOS Workflows

Use this procedure to modify all of the following workflows:

■ Alignment - TOS TM Account

■ Alignment - TOS TM Asset

■ Alignment - TOS TM Contact

■ Alignment - TOS TM Opportunity

To modify the TOS workflows

1 Prepare to modify a workflow.

a In Siebel Tools, connected to the Siebel server database, navigate to the Object Explorer and then Workflow Processes.

b Query for the workflow Alignment - TOS TM Account.

c Lock the project.

d Click Revise.

2 Create process properties:

a In the Object Explorer, open the child workflow process properties.

b Create a process property with the values shown in the following table.

Field	Value
Name	BatchAssignment
In/Out	In/Out
Data Type	String
Default String	FALSE

c Create a second process property with the values shown in the following table.

Field	Value
Name	LastModified Timestamp
In/Out	In/Out
Data Type	String

3 Right-click and select Edit Workflow Process.

4 Edit the arguments of the step Process TOS Object:

a In the Designer Window, select the step Process TOS Object.

b In the MultivalueProperty Window, display Input Arguments.

c Enter an input argument with the values shown in the following table.

Field	Value
Input Argument	LastModified Timestamp
Type	Process Property
Property Name	LastModified Timestamp

d Enter an input argument with the values shown in the following table.

Field	Value
Input Argument	BatchAssignment
Type	Process Property
Property Name	BatchAssignment

5 You have modified the Alignment - TOS TM Account workflow, and you must repeat Step 1
through Step 4, to modify the following workflows:

■ Alignment - TOS TM Asset

■ Alignment - TOS TM Contact

■ Alignment - TOS TM Opportunity

6 From the File menu, select Save All.

7 Exit from the designer.

8 Click the Publish button.

9 Activate the workflow.

a In the Siebel application, navigate to the Admin-Business Process screen then the Workflow Deployment view.

b Activate the following workflows:

❑ Alignment - TOS TM Account

❑ Alignment - TOS TM Asset

❑ Alignment - TOS TM Contact

❑ Alignment - TOS TM Opportunity

Modifying the Repository and Compiling
Use the following procedure to modify the repository.

To modify the repository and compile

1 Prepare to modify a business service.

a In Siebel Tools, connected to the Siebel server database, navigate to the Object Explorer and then Business Service.

b In the Name field, query for target Object Selector Service.

2 Create user properties.

a In the Object Explorer, open the child business service user properties.

b Create a user property with the values shown in the following table.

Field	Value
Name	Batch Assignment BC Map InDirect: TM Account
Value	TOS Account

c Create a second user property with the values shown in the following table.

Field	Value
Name	Batch Assignment BC Map InDirect: TM Asset
Value	TOS Asset

d Create a third user property with the values shown in the following table.

Field	Value
Name	Batch Assignment BC Map InDirect: TM Contact
Value	TOS Contact

3 Stop the Siebel server.

4 Compile the srf file with the new business service.

5 Start the Siebel server.

Tasks for Working with Territory Hierarchies

The following tasks describe how to work with territory Hierarchies:

■ "Viewing All Hierarchies for a Territory" on page 109

■ "Copying Territory Hierarchies" on page 109

■ "Deleting Territory Hierarchies" on page 110

■ "Removing Territory Nodes from Hierarchies" on page 111

Viewing All Hierarchies for a Territory

One territory can be in several hierarchies, as described in "About Territory Hierarchies and Divisions" on page 13.

You can view all the hierarchies that a given territory is in.

To view all hierarchies that a territory is in

1 Navigate to the Siebel Territory Management screen, then the Territories List view.

2 In the Territories list, drill down on the Territory # field for the desired territory.

3 Click the Hierarchies List view tab.

4 A list of all hierarchies for this territory appears. You can display any of these hierarchies and its territory nodes by clicking the Name field in the Hierarchies list.

Copying Territory Hierarchies

When you copy a hierarchy, Siebel Territory Management does a deep copy, copying all active nodes within the hierarchy. You enter a new name for the copied hierarchy, and Siebel Territory Management includes all the active nodes from the original hierarchy under the new copy of the hierarchy.

If you are creating a new hierarchy that is similar to an existing hierarchy, you can copy the existing hierarchy and then modify the copy.

Copying All Nodes

By default, when you copy hierarchies, the copy includes only the active nodes of the original hierarchy. You can configure Siebel Territory Management so the copy includes all the nodes of the original hierarchy.

To copy all nodes

■ Change the user property Copy All Territory Nodes in the business component Territory Hierarchy.

The default value is N.

Copying the Hierarchy

Use the following procedure to copy the hierarchy.

To copy a hierarchy

1 Navigate to the Siebel Territory Management screen, then the Hierarchies List view.

2 In the Hierarchies list, select the desired hierarchy.

3 From the Hierarchies list menu, select Copy Hierarchy.

TIP: Instead of the menu selection, you can press Alt+C.

4 Enter the name of the copy of the Hierarchy.

When you step off the record, Siebel Territory Management creates a copy of the original hierarchy and its nodes with the new name that you entered.

Deleting Territory Hierarchies

When you delete a territory hierarchy, Siebel Territory Management performs a cascade delete, which deletes all the nodes in the hierarchy as well as deleting the hierarchy record.

Siebel Territory Management will not delete hierarchies with active nodes. Before you can delete a hierarchy, you must make sure that none of its nodes is active.

To delete a hierarchy

1 Navigate to the Siebel Territory Management screen, then the Hierarchies List view.

2 In the Hierarchies list, select the desired hierarchy.

3 Click Delete.

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.

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, explicitly expire the associated rules, as outlined in the procedure below.

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 30.)

7 Using Siebel Enterprise Integration Manager with Siebel Territory Management

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

- "About Using Siebel Enterprise Integration Manager for Siebel Territory Management" on page 113
- "Siebel Territory Management Records Suitable for Bulk Loading" on page 113
- "Loading Siebel Territory Management Data into the Siebel Database" on page 114

About Using Siebel Enterprise Integration Manager for Siebel 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, Siebel Enterprise Integration Manager is a preferred way to enter data.

Siebel Territory Management Records Suitable for Bulk Loading

Table 11 lists the types records that you are most likely to want to bulk load into Siebel Territory Management using Siebel Enterprise Integration Manager.

Table 11.   Types of Siebel Territory Management Records Suitable for Bulk Loading

Record Type	Location on the Siebel Territory Management Screen
Territories	Territories List view
Territory nodes	Hierarchies List, Territory Nodes view
Rules	Alignments List, Rules view, Accounts, Contacts, Assets, Postal Codes, and Geo Zones subviews
Conditions	Alignments List, Conditions view

Loading Siebel Territory Management Data into the Siebel Database

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

Use the following Siebel Enterprise Integration Manager tables to load data from your external source into the Siebel Territory Management application (base) tables:

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

Index