Oracle Fusion Cloud Sales Automation

How do I set up Sales Territories?

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1 About This Playbook

How to Use This Playbook

This playbook is intended for sales administrators who are implementing sales territory management and work assignment in their sales organizations.

The Get Started with Sales Territories and Assignment chapter explains how to set up sales territories to assign accounts and opportunities for common use cases. Follow the outline of setup steps in the *Overview of Sales Territory and Assignment Setup*.

The rest of the guide focuses on advanced territory topics, including the creation of territory extensions.

2 Get Started with Sales Territories and Assignment

Setup Overview

If you assign accounts and opportunities to salespeople by address, product, industry, or other criteria, this chapter is for you.

You learn how to set up a sales territory hierarchy to automatically provide salespeople with access to the accounts, opportunities, and leads they need to work on. Although you set up Sales Territories in the Classic Sales UIs, sales territories apply to both Classic Sales and Sales in the Redwood User Experience.

The sales territory hierarchy you build also provides the reporting hierarchy used for forecasting.

The sales territory hierarchy is separate from the resource hierarchy you built earlier when you created sales users. Both hierarchies provide access to opportunities: the owners of parent sales territories gain access to opportunity data in child territories in the same way as resource managers gain access to the opportunities of the resources reporting to them. However, forecasting relies on the sales territory hierarchy. If you want sales managers to forecast and work quotas, create a sales territory hierarchy that includes those sales managers.

> **Note:** If your salespeople forecast only the opportunities they own and you don't need to assign opportunities to them automatically by address or other criteria, then you can skip this chapter entirely. That's because, for this use case, the application sets up everything you need. It sets up a territory structure that mirrors your sales organization hierarchy. And it automatically assigns the opportunity to the opportunity owner's territory. The opportunity revenue gets included in the owner's forecast and passed up the management chain for adjustment and approval.

Here are the steps for setting up sales territories and assignment.

Step	Description	Navigation	Where to Get More Details
1	Enable the territory dimensions you plan to use in your territories.	**Setup and Maintenance** > **Sales** > **Territories** > **Enable Dimensions and Metrics**	See the topic: *Enable Sales Territory Dimensions*
2	Create a territory proposal. A proposal is a sandbox that permits you to update territories without affecting any existing territory setup.	**Navigator** > **Territories**	See the topic: *Create a Territory Proposal*
3	Create the hierarchy of sales territories in the proposal starting with the top territory and working your way down. You can get an overview of some of the techniques you can use for the setup in the Sales Territory Use Cases section.	**Navigator** > **Territories**	See the topic: *Create the Sales Territory Hierarchy*

Step	Description	Navigation	Where to Get More Details
4	Activate the territory proposal.	**Navigator** > **Territories**	See the topic: *Activate the Territory Proposal*
5	Enable automatic assignment of sales territories to imported accounts by setting the following system profile options to Yes: • Sales Account Automatic Assignment on Import Enabled • Sales Account Automatic Assignment on Create Enabled • Sales Account Automatic Assignment on Update Enabled	**Setup and Maintenance** > **Sales** > **Foundation** > **Manage Administrator Profile Values**	See the topic: *Enable Automatic Assignment of Imported Accounts*
6	You can enable automatic assignment of territories to opportunities whenever the opportunities are updated. By default, the application automatically assigns sales territories to accounts whenever an account is created or updated, but opportunity assignment isn't automatic. Sales users must trigger opportunity assignment manually while editing an opportunity or they must wait for the opportunity assignment process to run. Oracle specifies manual opportunity assignment as the default to prevent performance issues for companies with a large number of opportunity lines (100, 000 and up). If your organization doesn't have such a large volume, then set the profile Assignment Submission at Save Enabled to Yes. Oracle also recommends a setting of Yes for forecasting.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Opportunity Profile Options**	See the topic: *Make Opportunity Assignment Automatic*
7	Run the account and opportunity assignment processes, Request Account Assignments and Request Revenue Territory Assignment, immediately after setting up sales territories and on a regular schedule, perhaps once every day during off-peak hours.	**Navigator** > **Tools** > **Scheduled Processes**	See topics: • *Run the Account Assignment Process* • *Run the Opportunity Assignment Process*

Sales Territories and Assignment

Getting assigned to a sales territory provides salespeople with access to accounts and opportunities. Sales territories also provide the framework for forecasting. Salespeople can forecast only opportunity lines in their territories and forecasts roll up the territory hierarchy.

How You Gain Access to Sales Data

All salespeople can view basic account information, including customer names, contacts, and addresses. You must have more access to view the opportunities on the account, and to share all the details you need to collaborate during the sales process. Information that requires more access includes customer interactions, to-do lists, and appointments. Without the extra access, you can't share collateral, and collaborate on presentations. If you implement Microsoft 365 or Mobile, then only the accounts that are part of a salesperson's territory are downloaded and synchronized. Here's how you get access to more sales information:

- You're the owner of the record.

  Each record must have an owner. You automatically become the owner of any record you create. The owner, who's automatically a member of the team on the record, has full privileges, including the ability to edit the record and add others to the team. The record owner or the sales administrator can reassign ownership of individual records. The sales administrator can also reassign ownership of multiple records at the same time using the Mass Transfer feature available in the Navigator. Users converting a lead to an opportunity, can also assign the owners of the resulting accounts and opportunities.
- You're a member of the team on the record.

  The owner can add members manually and assign different levels of access to them: view only, edit, or full (the ability to add others). For opportunity and lead teams, you can also assign team members automatically using assignment rules.
- You're the owner or a member of a sales territory assigned to the record or owner or member of the parent territories in the sales territory hierarchy.

  Being the owner of a territory gives you additional privileges over a member: owners can review and submit forecasts up the sales territory hierarchy.

  > **Note:** While the territory name is always listed in each record that's assigned to a territory, opportunities also copy over the names of the territory members to the opportunity team. Lead teams and account teams don't include the territory team members. To make the opportunity team behavior consistent with leads and accounts, you can set the system profile option Territory Based Resource Assignment Style as described in the Opportunity Profile Options Default Values and Effects topic in the Implementation Reference guide.
- You're a manager in the resource hierarchy of the resource with access.

  Managers in a salesperson's resource management hierarchy have automatic visibility to their team's set of accounts, contacts, opportunities, leads, and other information. They don't have to be explicitly assigned to each territory or team. The resource hierarchy provides you access to sales data, but not to forecasts. Only territory owners can view forecasts. Most Oracle customers create a sales territory hierarchy that matches the resource hierarchy, so a manager is also the owner of the territory, but the two can be different.
- You're assigned to an access group.

Access groups provide an alternate way of providing access to sales data based on conditions you define. For example, you can use access groups to grant specific users access to all open opportunities, or all accounts in the UK, and so on. Access groups aren't replacements for sales territories, but they provide a good way to grant access to people who assist with sales. For example, you might need to provide the legal department with access to certain opportunities.

- You're a sales administrator (a user with the Sales Administrator job role).

  Sales administrators have access to everything.
- The implementation team configures and assigns job roles with different privileges.

  You can change the default access levels, by copying and modifying the existing job roles. See the Create and Edit Job, Abstract, and Duty Roles chapter of the Securing CX Sales and Fusion Service guide for more details.

How You Grant Additional Access Automatically

You can provide salespeople access by manually reassigning record ownership or adding someone to the team on the record, or you can automate the process using one or both of the following methods:

- Assign access using sales territories.

  You can set up the sales territory boundaries based on a wide variety of factors, called dimensions. The most common dimensions include address, product, customer size, customer type, and industry. Many Oracle customers also define their own additional dimensions.

  When you assign salespeople using territories, the territories themselves become associated with the account, opportunity, or lead. If you later realign your sales territories or if there's a turnover in your sales organization, then the assignments reflect those changes automatically after you run the assignment process.

  The application assigns territories for each individual opportunity line separately. If an opportunity line gets assigned to your territory, you automatically gain access to the whole opportunity. If Lisa Jones' territory includes servers and Julian Henderson's laptops, both salespeople get access to an opportunity that includes servers and laptops.
- Assign opportunity and lead access to specific individuals by creating assignment rules.

  You can use rules to assign individual salespeople you specify to lead and opportunity teams if the rule conditions are met. Rules are the primary way of assigning salespeople to leads, and so rule setup is covered in the Leads chapter. For opportunities, you can create rules to assign additional salespeople using factors that aren't covered by sales territories, such as deal size or product knowledge. Creating rules to supplement territory assignment requires additional setup, including the setting of system profile options not covered in this guide. See the Implementation Reference guide for details.

Salespeople can trigger assignment manually or you can assign leads, accounts, and opportunities automatically by running assignment processes.

Sales Territory Boundaries

You define sales territory boundaries by the values you assign to their dimensions. For accounts, the territory dimensions provided by Oracle include:

- Address

  Define territories by address elements such as city, state, and postal code.
- Geography

  Legacy dimension that existing customers are using for geographical territories. While you can still use Geography to set up territories by states and other address elements, new Oracle customers should use the Address dimension instead. You can't use this dimension together with the Address dimension.
- Account type

  The account type specifies if the account is named or not.
- Customer size
- Industry
- Organization type

You can also create classification categories to define up to three additional dimensions.

Because opportunities are associated with an account, you can use the account dimensions to assign opportunities as well. Opportunities and leads have these additional dimensions:

- Business unit
- Product

  You can enter product groups or individual products from the sales catalog.
- Sales channel

  The available sales channels are: Direct, Indirect, and Partner.

How Sales Territories Support Assignment and Forecasting

Here's how sales territories support automatic assignment and sales forecasting.

Sales Territory Assignment

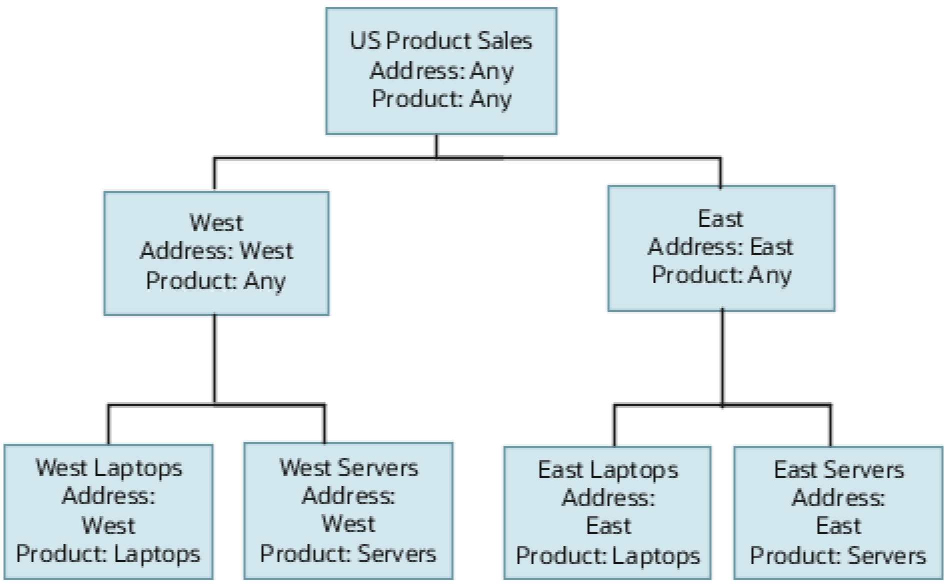
Sales territory assignment matches the values that you enter in the territory dimensions to the records you're assigning. The application:

1. Evaluates all territories regardless of their position in the sales territory hierarchy to see if there's a match.
2. Discards the ancestors of any of the matching territories.

Here's an example to illustrate how sales territories work in assignment and forecasting. Consider a simple territory hierarchy for a company that sells laptops and servers in the US:

- The company divides the US states and assigns them to two territories: East and West.
- The East and West territories are divided into two territories, one territory sells laptops and the other sells servers.
- The company requires only two territory dimensions to define territories: address and product.

Here's what the sales territory structure looks like:



Here are the values that you enter in the address and product dimensions for the example:

- A value of Any means that all values, even a missing value, match.
- The top territory in this hierarchy has a value of Any across all the dimensions making it the overall catchall territory.

  The application assigns all records not matching any of the coverage values of other territories to the overall catchall territory.
- The West and East territories have a value of Any for the Product dimension. They are the catchall territories for any opportunities in those regions for products other than laptops and servers.

Territory Name	Address	Product
US Product Sales	Any	Any
West	States in the western US	Any
East	States in the eastern US	Any
West Laptops	States in the western US	Laptops

Territory Name	Address	Product
West Servers	States in the western US	Servers
East Laptops	States in the eastern US	Laptops
East Servers	States in the eastern US	Servers

To assign accounts, assignment uses the address of the account only (there's no product information available in accounts). Here's how the application assigns an account with an address in New York:

1. Finds the following matching territories: East Laptops, East Servers, East, US Product Sales.

   East Laptops, East Servers, and East territories include New York explicitly in the list of states. US Product Sales has the value of Any in the address dimension.
2. Discards East and US Product Sales because these are parents and grandparents of the East Laptops and East Servers.

The application assigns the account to the East Laptops and East Servers territories.

For assigning opportunities, the application assigns each opportunity line separately. The assignment process uses the address of the account (each opportunity must be associated with an account). For example, here's how the application assigns an opportunity for servers and laptops in a New York account.

Here's how the application assigns the servers opportunity line:

1. Finds these matching territories: East Servers, East, and US Product Sales

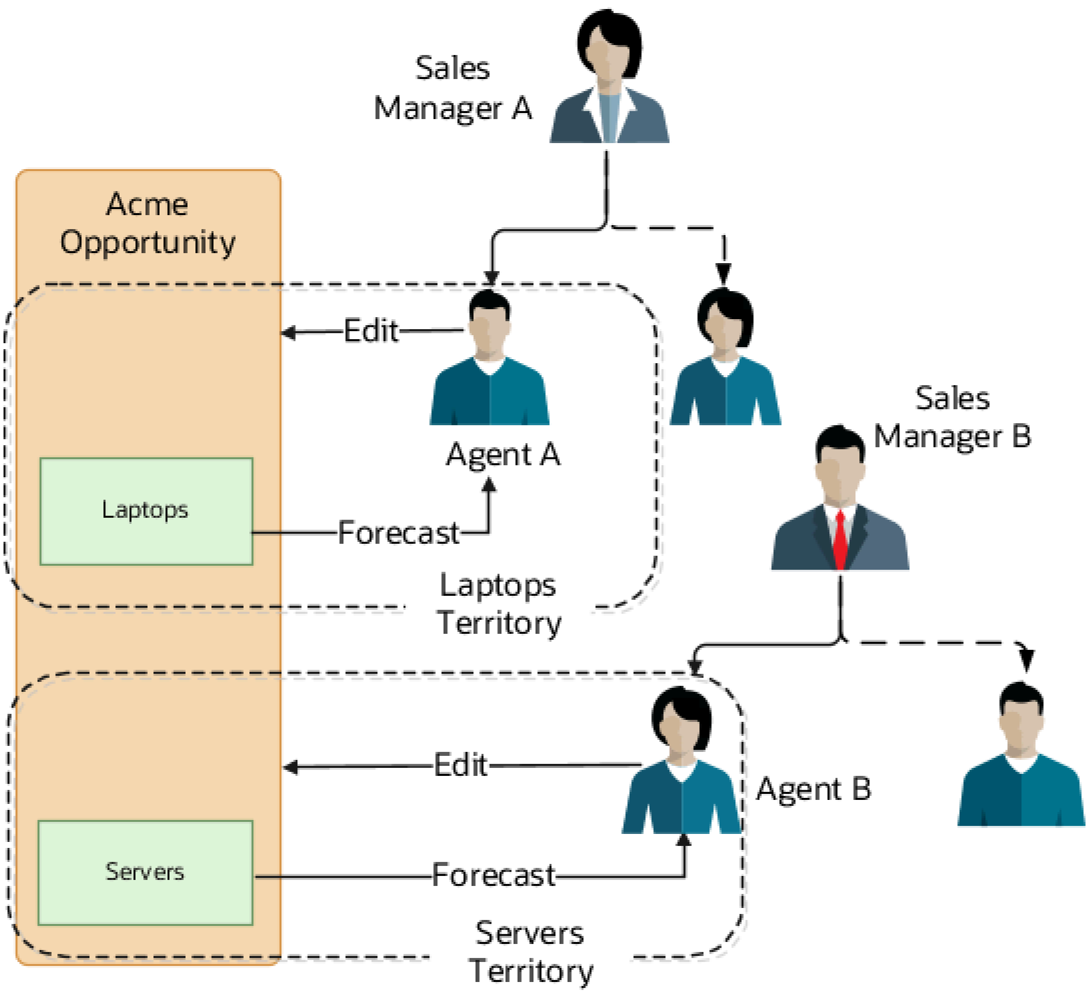
   East Servers includes the correct product and state. East includes the state and Any as the value for the product. US Product Sales matches because it has Any for both dimensions.
2. Discards East and US Product Sales because these are parents and grandparents of East Servers.

The application assigns the opportunity line to the East Servers territory. The application uses the same process to assign the laptop opportunity line to the East Laptops territory.

For the matching territories, assignment gives each territory owner edit access to the opportunity as a whole, and both territories are listed on the opportunity Team tab. Only the matching opportunity line is included in forecasts for that territory, however.

Here's a diagram that illustrates the different effects of territory assignment on opportunity access and forecasting. The diagram shows an opportunity for laptops and servers. Here's what happens when agent A owns the laptops territory and agent B owns the servers territory:

- Both agents gain edit access to the opportunity as a whole.
- Agent A can only forecast laptops.
- Agent B can only forecast servers.
- Agent A's and Agent B's managers (who are also the owners of the parent territories) gain access to the opportunity as a whole, but they get to view and adjust only the forecasts submitted by their subordinates.
- The colleagues of agents A and B don't have any visibility into the opportunity unless they have edit access to the account.



The Importance of Catchall Territories

Some of the values required for assignment may be missing from the records you're assigning and you may have gaps in your territory coverage. For these reasons, you must set up one or more catchall territories with `Any` as the value for each of your territory dimensions. The value of `Any` means that any value, even a missing value, is a match. The owner of the catchall territory, or another user you assign as a territory member, must monitor the catchall territory for records that didn't get assigned properly. You can adjust your territory structure over time to minimize the number of records assigned to the catchall territories.

Using the sample territory setup, an opportunity for service (a product not specified in any territory) in a Japanese account (a country not specified in any territory) is assigned to the overall catchall territory. An opportunity for service in California, gets assigned to the West territory because the West territory includes the rule: Country=US, State=CA.

How Sales Territories Work for Forecasting

You can enable two types of forecasts: Prime and Overlay. Forecasts designated as Prime forecast sales revenue. Overlay forecasts are designed to permit any overlay organization, such as sales support, to create a separate forecast. The overlay forecast isn't included as part of the sales revenue forecast. How forecasting works depends on the hierarchy of the sales territories you set up and the value you enter in the Enable Forecasting field for each territory. The Enable Forecasting field can have these values:

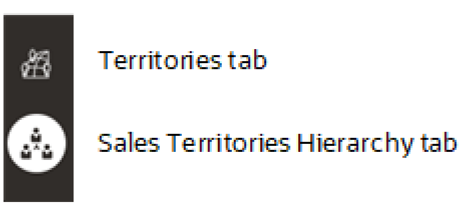
Enable Forecasting Field Value	Explanation
Prime only	The territory owner can forecast and adjust the sales revenue forecasts.
Overlay only	The territory owner can forecast and adjust forecasts that are not counted in the sales revenue forecast. Use this value instead of Disabled for catch-all territories and other territories you want to exclude from sales revenue forecasts.
Prime and Overlay	The territory owner can adjust both types of forecasts.
Disabled (obsolete)	Don't use this value. Use **Overlay only** instead for catch-all territories.

The sales territory hierarchy that you set up determines how forecasts and any adjustments are rolled up. In the example, the East Laptops and East Servers forecasts are automatically rolled up to the owner of the East territory for review and adjustment. The forecasts are then rolled up to the US Product Sales territory owner. The western forecasts mirror that process.

Sales Territory UIs for Different Uses

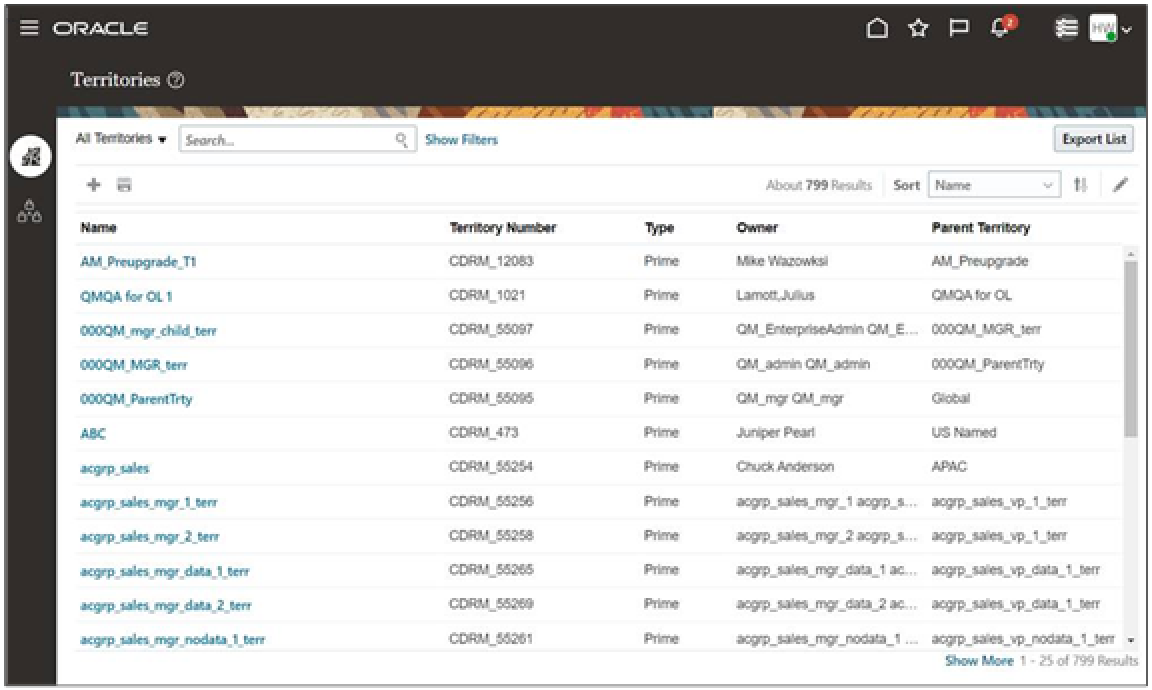
You have the option of using multiple UIs to manage sales territories. You can make changes to individual territory coverage and other adjustments in Workspace and in the Territories tab of the Territories work area. For creating territory hierarchies, you must use the Sales Territories Hierarchy tab of the Territories work area.

The Territories work area includes two tabs: a full-featured UI that's designed for setting up the territory hierarchy and a simpler UI that you can use for ongoing minor adjustments to territories after they're set up. Users can toggle between the two UIs by clicking the **Territories** and **Sales Territories Hierarchy** tabs on the left side of the Territories work area or in Workspace.



Territories Tab for Making Changes to Live Territories

When you open the Territories work area, the application displays the Territories tab. The tab is optimized for sales managers who want to make simple changes to live territories, such as changing territory owners or minor tweaks in coverage.



On this tab, you can add any prospect accounts as named accounts in your sales territories. In the Sales Territory Hierarchy Tab, the prospect accounts you add must be part of an account hierarchy below a customer account.

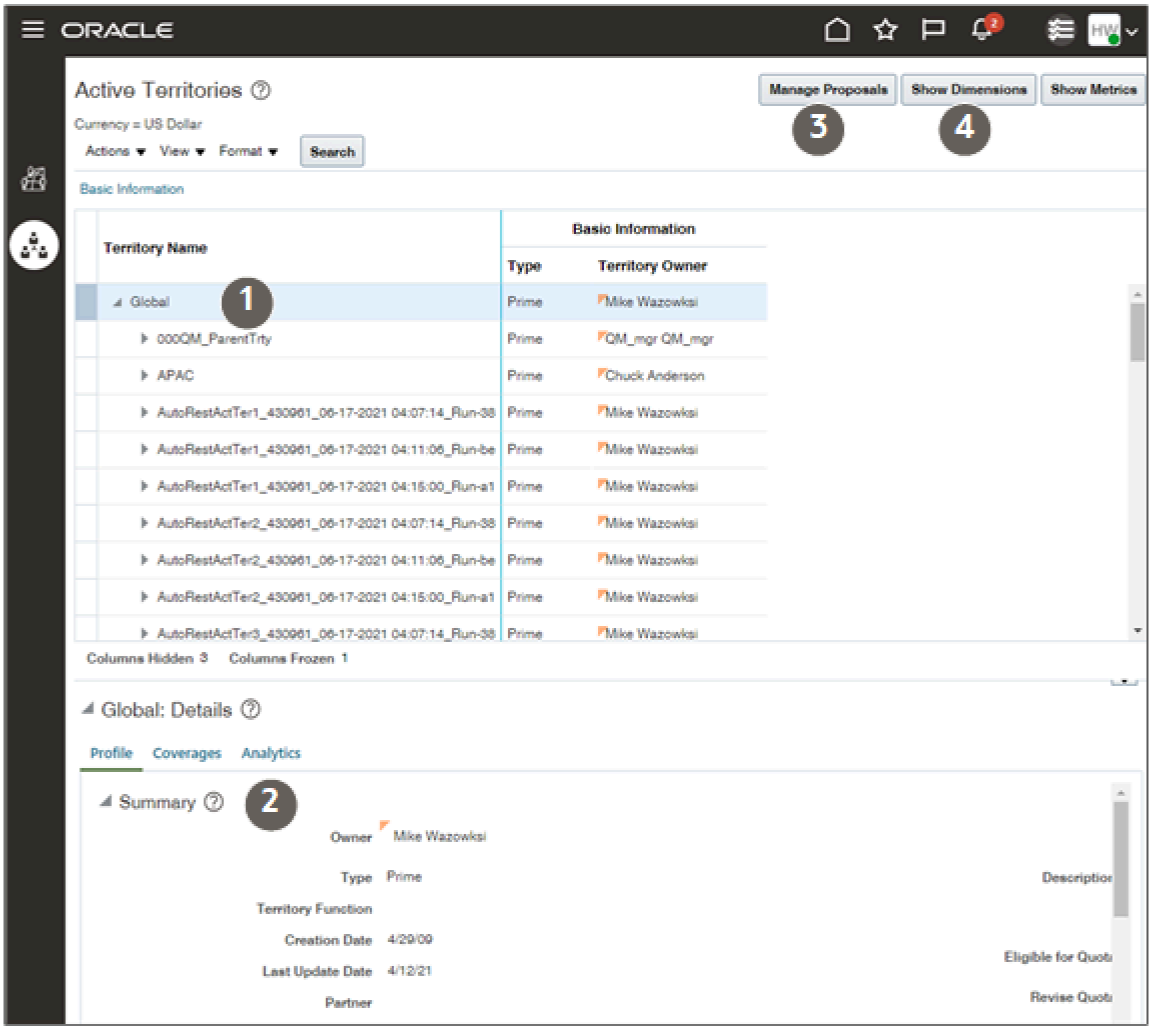
> **Note:** If you want to use add accounts of type prospect to sales territories, make sure that the profile option Account Types Enabled for Assignment (ZCA_ASSIGNMENT_ACCT_TYPE_ENABLED) is enabled for prospects by setting the profile to `ZCA_CUSTOMER,ZCA_PROSPECT`, see the topic *Enable Prospects for Inclusion in Sales Territories*.

Sales Territories Hierarchy Tab for Building Your Sales Territory Hierarchy

To build sales territory hierarchies, you use the Sales Territory Hierarchies tab. On the Sales Territories Hierarchy tab, territory setup is done not on live territories, but in a proposal that you must activate after your setup is complete. Proposals make it possible to make territory revisions without affecting live territories and to create different versions to be used at different times.

Here's a screenshot of the Active Territories page on the tab. The callouts highlight and describe different features on the page.

Callout Number	Feature Description
1	The left pane of the Active Territories page displays the active territories as a collapsible hierarchy.
2	Selecting a territory, displays territory details at the bottom of the page.
3	Using the **Manage Proposals** button, you can create territory proposals with your territory changes.
4	The **Show Dimensions**,**Hide Dimensions** button lets you toggle the display of dimension details in the list of active territories.



Differences Between the Two UIs

Here are the major differences between what you can do in the two UIs. Whichever UI you're using to make your territory changes, your records aren't reassigned until the appropriate assignment process runs.

Feature	Sales Territory Hierarchies Tab	Territories Tab
Changing a territory owner or member	Your changes aren't effective until you activate the proposal.	Your changes take effect immediately.
Making changes without immediately effecting live territories	You create territories in a territory proposal that isolates your changes from existing active territories until you activate. You can even decide to create different proposals to go live in the future, to account for seasonal sales demands, for example.	Territory proposals aren't available. Changes you make to territories are immediate.
Inheriting the properties of parent territories	When you create child territories in both UIs, the child territories automatically inherit the properties and coverage of the parent	At creation, the child territories automatically inherit the properties and coverage of the parent territories. However, in the Territories

Feature	Sales Territory Hierarchies Tab	Territories Tab
	territories. In the Sales Territory Hierarchies Tab, you can also link territories so that any subsequent change in coverage for the parent territory is automatically reflected in the linked territory.	tab UI, you can't link the territories to make subsequent coverage changes reflected automatically.
Include prospect accounts in sales territories as named accounts.	You can only add prospect accounts that are part of an account hierarchy and below an account of type customer.	You can add any prospect account to a territory.

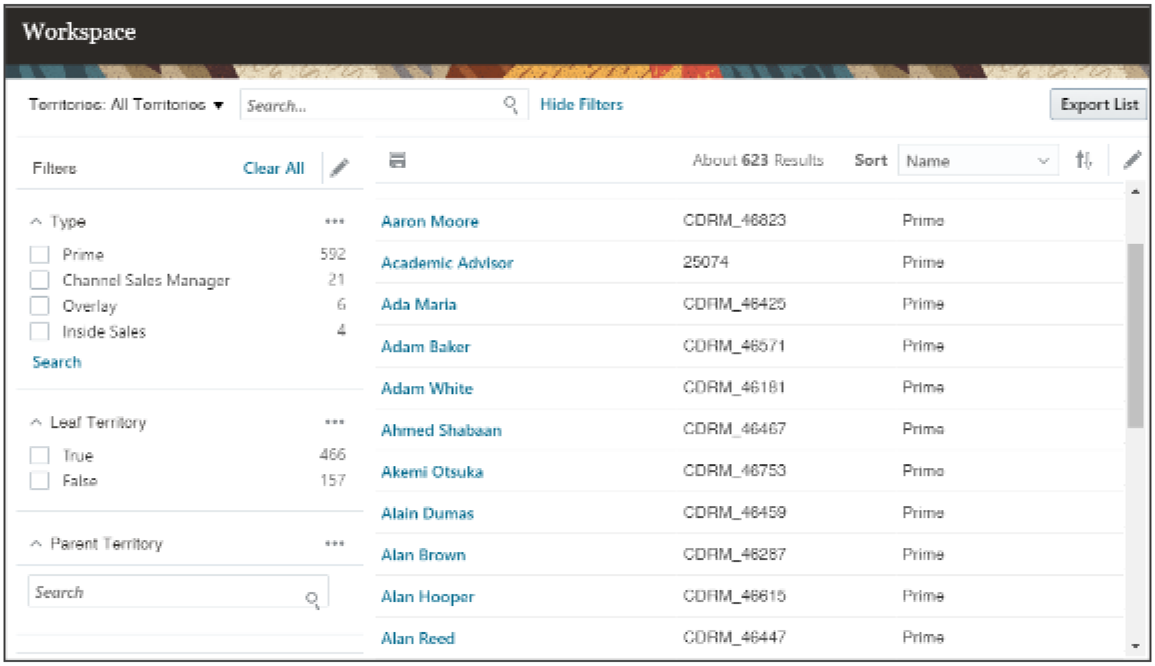
How You Can Make the Sales Territory Hierarchies UI the Default and Only UI

By default, users can toggle between both UIs using the tabs. You can make the Sales Territory Hierarchies UI the default UI and remove the tab controls. To change the defaults, all you have to do is set the system profile option Default to Territory Classic Interface (MOT_DEFAULT_CLASSIC_INTERFACE) to Yes. The setting, which is made at the site level, affects all users. You can edit the system profile value option from the Setup and Maintenance work area using the following:

- Offering: Sales
- Functional Area: Sales Foundation
- Task: Manage Administrator Profile Values

Use Workspace for Resolving Territory Gaps and Overlap Issues

Managers who need to resolve territory gaps and overlap issues in existing territories, can also use Workspace. Both Workspace and the Territories work area let you search for territories not only by salespeople but also by dimension coverage details, such as included accounts, products, or geographies. The territories features in Workspace are the same as in the Territories tab in the Territories work area. What Workspace doesn't have is the ability to create and manage hierarchies. For that you must go to the Territories work area.



Can I include a prospect account in a sales territory?

Yes, you can include prospects as named accounts in sales territories.

> **Note:** Make sure that the profile option Account Types Enabled for Assignment (ZCA_ASSIGNMENT_ACCT_TYPE_ENABLED) is enabled for prospects by setting the profile to `ZCA_CUSTOMER,ZCA_PROSPECT`.

To add prospects to territories, use the Territories tab in the Territories work area. The Sales Territories Hierarchy tab, where you set up territory hierarchies using proposals, limits how you can add them. Here are the details of what you can do in each tab.

Territories Tab

On the Territories tab, you can add any account of type prospect to a live territory.

Sales Territories Hierarchy Tab

On the Sales Territory Hierarchy tab, you can:

- You can add prospect accounts only if they're child members of an account hierarchy for accounts of type customer.
- View and delete prospect accounts. These include prospect accounts that you added on the Territories tab that aren't part of a hierarchy.

Sales Territory Use Cases

Overview

This section uses very simple examples to illustrate how you set up sales territories to provide salespeople access to accounts and opportunities and how you enable them to forecast.

The examples use the two most frequently used dimensions: address and product. Here's what they cover:

- Automatically assigning access to individual salespeople by product or address.
- Automatically assigning access only to managers when salespeople manage and sell to their own accounts.
- Handling territories that don't roll up neatly by address or by product and to separate assignment and forecasting.
- Automatically assigning product specialists and others to help with a particular opportunity line using special territories, called overlay territories.
- How to set up catchall territories so executives don't have to troubleshoot territories.
- Ignoring or hiding the owner fields in the account and opportunity UIs and relying exclusively on sales territories and assignment rules to determine access.

As a rule, if you can draw the boundaries of sales territories along some dimension, then you should use sales territories to automatically assign access to accounts and opportunities to individual salespeople. Assigning salespeople using territories makes it easy for you to change the assignment when salespeople leave or are hired and to perform sales territory realignment. When you're realigning territories to balance the workload and to reward your top performers, you can experiment with different what-if sales territory scenarios in territory proposals. If you're dividing your territories by address and by product, then you can draw the territory boundaries for individual salespeople by either dimension.

Salespeople in a Region Sell Different Products to the Same Customers

Suppose, for example, that salespeople in a particular region sell different types of products to the same customers. You want salespeople to coordinate their engagement with each customer and to be always included on those opportunities that involve their products.

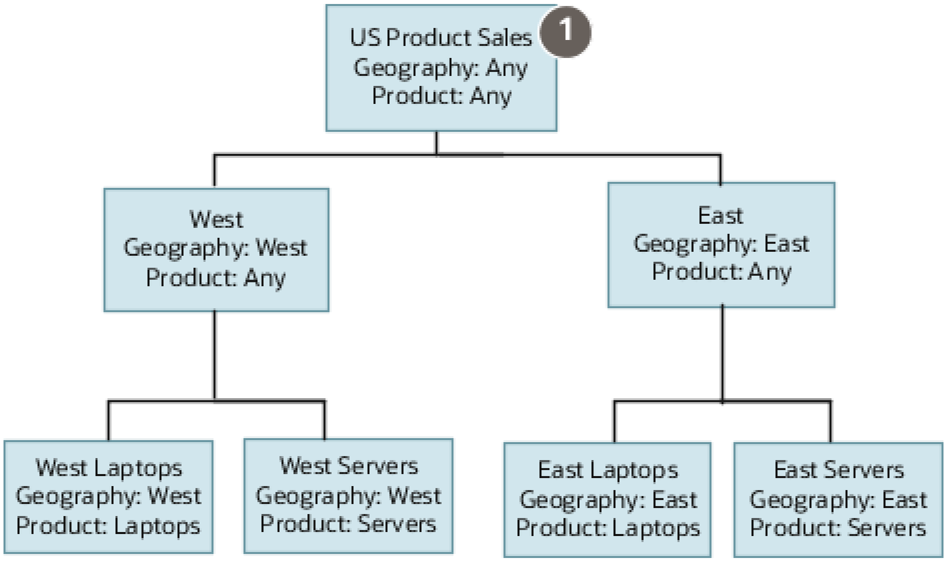
You know which salespeople work in each region, so you can use territories to provide them with edit access to all accounts in their region using the address dimension. You can then assign salespeople to opportunities when their products are involved using the product dimension.

Territory Setup

The US product sales organization is divided into two regions: West and East. Each regional office includes a manager and two salespeople who sell different products: one sells laptops and the other servers.

Here's a diagram of the sales territory hierarchy. You must always create at least one catchall territory with the value of Any for each of your dimensions. The overall catchall territory is the topmost territory (callout 1), but both the West and

East territories serve as catchall territories for the product dimension. For the Address dimension, you must list every state in each territory.



Here are the key entries for the territories in this example. Territory Type is always set to **Prime** because all territories are used for sales revenue forecasting. The Enable Forecasting field is always set to **Prime only**, enabling the territory owner to participate in sales revenue forecasting. For the Address dimension coverage, you must enter a separate line for every state.

Territory Name	Territory Type	Address	Product	Enable Forecasting
US Product Sales	Prime	Any	Any	Prime only
East	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Any	Prime only
East Laptops	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Laptops	Prime only

Territory Name	Territory Type	Address	Product	Enable Forecasting
East Servers	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Servers	Prime only
West	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Any	Prime only
West Laptops	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Laptops	Prime only
West Servers	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Servers	Prime only

How Assignment Works for This Scenario

When a lead comes in for a potential customer with an address in California who is interested in purchasing laptops, the inside sales team converts the qualified lead into an account and opportunity. The application does the following:

- Assigns the West Laptops and West Server territories to the account because California matches the address dimension. The owners of the territories gain full access to the account and can share information about their interactions with the customer. Full access means they can add other team members in addition to editing the account information itself.

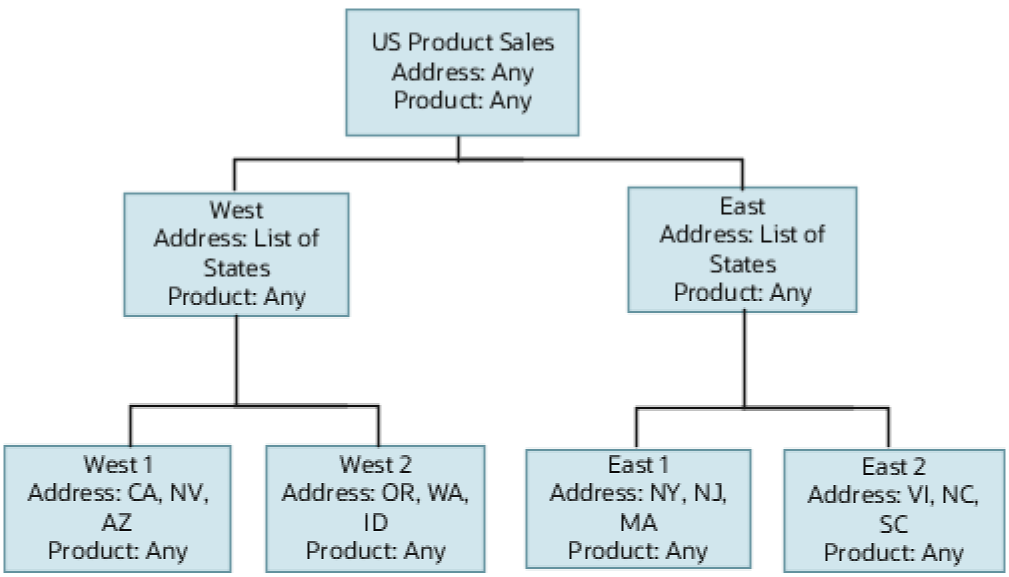
- If the account is missing the state in the address, the application assigns the account to the catchall territory, US Product Sales.
- Assigns the West Laptops territory to the opportunity line using the product dimension and the address of the account. The laptop revenue can now be forecast by the West Laptops territory owner.
- If the opportunity line for the California account is for products other than laptops and servers, then the application assigns the opportunity line to the West territory.

Salespeople Sell All Products to Customers in Their Region

If you draw boundaries purely by address elements in a geographical region, then each salesperson handles customers in their particular region and sells all of the products into that region.

Territory Setup

Here's a diagram of a sample territory structure. The West and East regions split the states in the US. Each of the two regional territories are split again. You must list every state in each territory.



Here are the territories for this example and the key entries for each. For the Address dimension coverage, you must enter a separate line for every state. The Product dimension value is always Any because salespeople sell all products. You could choose not include the Product dimension at all if you're not going to be using products for assignment elsewhere in your territory hierarchy. The Territory Type is always set to **Prime** and the Enable Forecasting field to **Prime only**

Territory Name	Territory Type	Address	Product	Enable Forecasting
US Product Sales	Prime	Any	Any	Prime only
East	Prime	• Country: United States, State: NY	Any	Prime only

Territory Name	Territory Type	Address	Product	Enable Forecasting
		• Country: United States, State: NJ • Country: United States, State: MA • Country: United States, State: FL And entries for all the remaining 21 states in the eastern half of the US		
East 1	Prime	A subset of the states in the east: NY ,NJ, MA, RI, and so on.	Any	Prime only
East 2	Prime	A subset of the states in the east: VI, NC, SC, FL, and so on.	Any	Prime only
West	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ • Country: United States, State: NM And entries for all the remaining 21 states in the western half of the US	Any	Prime only
West 1	Prime	A subset of the states in the west: CA, NV, AZ, and so on.	Any	Prime only
West 2	Prime	A subset of the states in the west: OR, WA, ID, MT, UT, NM, and so on.	Any	Prime only

How Assignment Works for This Scenario

When a lead comes in for a potential California customer who's interested in purchasing laptops, the inside sales team converts the qualified lead into an account and an opportunity. Here's what the application does:

- Assigns the West 1 territory to the account because California is in the West 1 territory. The salesperson in the territory gains edit access as does her management chain.
- Assigns the West 1 territory to any opportunity line for the California account using the account address.
- If the account is missing the state in the address or is located in another country, then the application assigns the account to the catchall territory: US Product Sales.

Salespeople in Each Region Manage Their Own Accounts and Sell All Products to Those Accounts

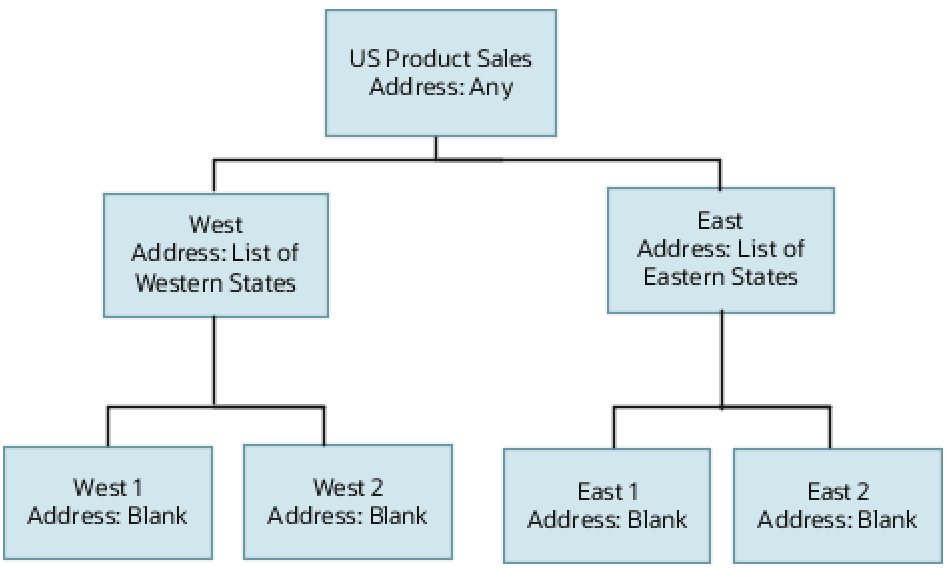
If individual salespeople in each region manage their own customer relationships and sell all products to those customers, then there may be no way of drawing sales territories to assign new accounts to them directly.

Instead, you can automatically assign access to the managers in each region and have the managers distribute the accounts to the salespeople working for them. Even though you are not assigning records to individual salespeople, you must still set up territories for them so they can forecast.

Territory Setup

Because everyone sells all products, you can set up sales territories by address only for the managers. For salespeople, you create territories with no coverage for the address dimension so the territories get skipped over by assignment but can be used for forecasting. A territory with no coverage is blank, has no entry, for any dimension.

Here's a diagram that shows the territory hierarchy using only the address dimension. You must list all the appropriate states in the West and East territories. An entry of Blank means the territory has no address coverage (no accounts are assigned automatically). Because all salespeople sell all products, the product dimension is not required unless you are using products in overlay territories or other portions of your territory setup.



Here are the key entries for each territory. Territory Type is always set to **Prime** because all territories are used for sales revenue forecasting. The Enable Forecasting field is always set to **Prime only**, enabling the territory owner to participate in sales revenue forecasting.

Territory Name	Territory Type	Address	Enable Forecasting
US Product Sales	Prime	Any	Prime only
East	Prime	• Country: United States, State: NY	Prime only

Territory Name	Territory Type	Address	Enable Forecasting
		• Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	
East 1	Prime	Blank	Prime only
East 2	Prime	Blank	Prime only
West	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Prime only
West 1	Prime	Blank	Prime only
West 2	Prime	Blank	Prime only

Child territories automatically inherit the coverage of their parent when you create them, so you must delete the inherited coverage to make them blank. For details on how to delete the coverage for a territory, see the Creating a Territory with No Coverage topic.

How Assignment Works for This Scenario

When a lead comes in for a potential customer with an address in California who is interested in purchasing laptops, the inside sales team converts the qualified lead into an account and opportunity. Here's the assignment process:

1. The application automatically assigns the new account to the West territory using the address dimension.
2. The manager who owns the West territory (or a sales administrator working on the manager's behalf), edits the salesperson's territory and includes the account by name.
3. Running territory assignment automatically assigns the opportunity lines for that account to the same salesperson as well.

If an account is missing the state information or the account is in a country other than the US, then the account is assigned to the catchall territory, US Product Sales.

> **Note:** Because the accounts are assigned by name to the territories, administrators must manually move the accounts during territory realignment.

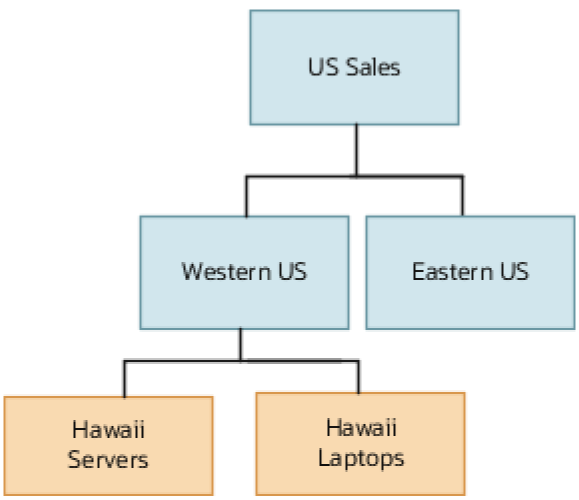
Irregular Territory Hierarchies Where Territories Don't Roll Up to the Same Parent

Normally, the coverage values in the child territories roll up to the parent. For example, the territory selling laptops in Hawaii and the territory selling servers in Hawaii both roll up to the territory selling products in the western US.

But what if the VP of US sales decides to take over the Hawaii servers territory for herself so she can play golf? Now the two Hawaii territories roll up to different levels in the territory hierarchy. You could end up with wrong assignments and duplicate forecasts. This topic explains how you can assure proper assignment and forecasting by creating parent territories with no coverage. A parent territory with no coverage still gets the forecasts from the children territories, but it's skipped over for assignment. Creating sales territories with no coverage effectively separates assignment and forecasting. Here are two scenarios to illustrate the difference between a regular hierarchy and an irregular one.

Regular Address Hierarchy

Here's a diagram illustrating the structure of a simple regular address hierarchy. The Western US territory includes territories for the western states and the Eastern US territory includes all the territories for the eastern states. The Western US territory is the parent of both Hawaii Servers and Hawaii Laptops.



Here are the entries for the territories in the diagram.

Territory Name	Territory Type	Address	Product
US Sales	Prime	Any	Any
Eastern US	Prime	States in the eastern US.	Any
Western US	Prime	States in the western US.	Any
Hawaii Servers	Prime	Hawaii	Servers
Hawaii Laptops	Prime	Hawaii	Laptops

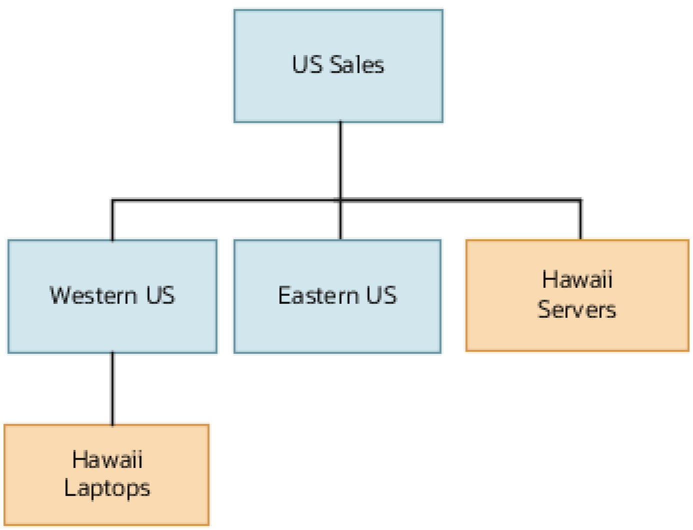
Territory Name	Territory Type	Address	Product

Here's how the application assigns accounts and opportunities using this territory setup:

- An account in Hawaii is automatically assigned to both the Hawaii Servers and Hawaii Laptops territories.
- An opportunity for a server in a Hawaii account is assigned to the Hawaii Servers territory. An opportunity for a laptop goes to the Hawaii Laptops territory.
- An opportunity for a service product in Hawaii is assigned to the Western US.

Irregular Address Hierarchy

Now imagine that the Vice President for US Sales likes to play golf in Hawaii, so she decides to handle one of the Hawaii territories herself. The resulting territory structure splits Hawaii across two different hierarchy levels. The Hawaii Servers territory is now a child of US Sales, while the Hawaii Laptops territory remains under Western US. The following figure reflects the change.



If you keep the territory settings the same and the same opportunity comes in for servers in the Hawaii account, the application assigns both the Western US and Hawaii Severs territories.

Here's how the application arrives at the assignment:

1. The application first checks for all possible matching territories. These are Western US, Hawaii Servers, and US Sales
2. The application discards all the ancestors of the matching territories: US Sales is a parent of Western US so gets discarded.

Because the opportunity is assigned to two territories in the hierarchy, it could end up in both territory forecasts and being counted twice in revenue projections. You can fix the assignment issues in this example by creating the Western US territory with blank coverage. Having blank coverage (no coverage in all the territory dimensions) means that the territory gets skipped for assignment, but still allows for forecasting to roll up as before. Here are the revised entries:

Territory Name	Territory Type	Address	Product
US Sales	Prime	Any	Any

Territory Name	Territory Type	Address	Product
Eastern US	Prime	States in the eastern US.	Any
Hawaii Servers	Prime	Hawaii	Servers
Western US	Prime	Blank	Blank
Hawaii Laptops	Prime	Hawaii	Laptops

The application now assigns only the Hawaii Servers territory. Here's how the application arrived at the assignment:

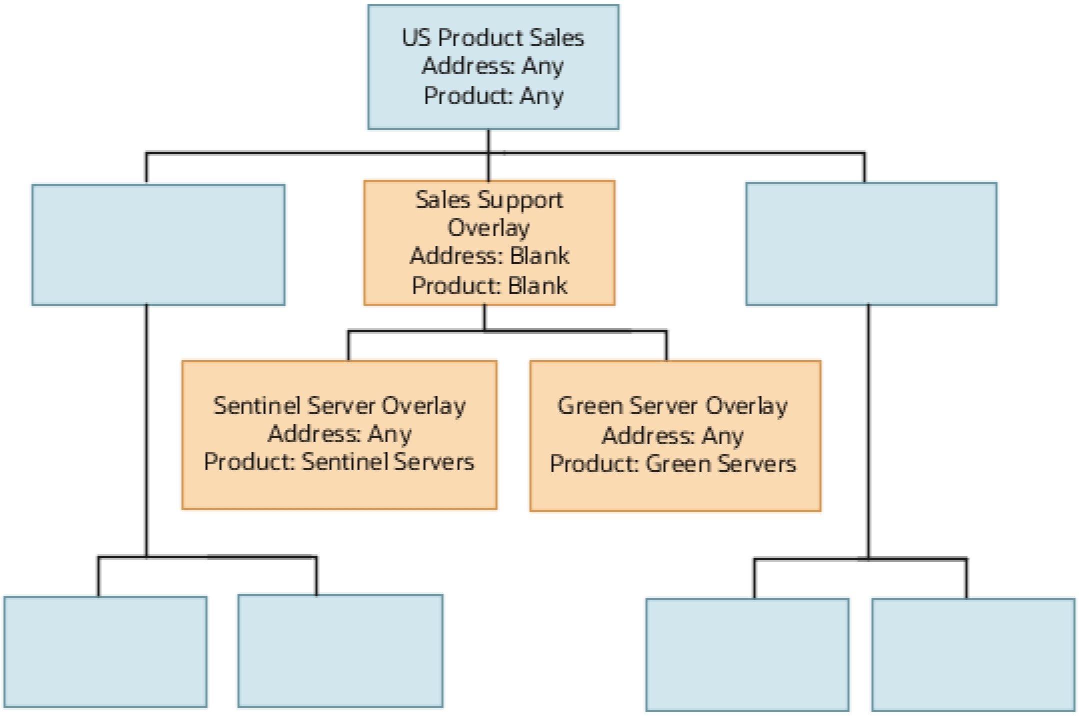
1. The application first checks for all possible matching territories. These are Hawaii Servers, and US Sales.
2. The application discards all the ancestors of the matching territories: US Sales is a parent of Hawaii Servers and so gets discarded.

How to Assign Outside Help Using Overlay Territories

Sometimes you want to assign others in your organization to assist with a sale. For example, if an opportunity line includes complex equipment, product specialists may be required to help with the technical details. You can make such assignments using overlay territories.

Sales Territory Setup

This diagram shows a simple overlay organization in a sales territory structure. The overlay organization consists of a manager and two product specialists. Each specialist is automatically assigned to help with the sale of a specific server model. The overlay organization territories are the children of the US Product Sales catchall territory for convenience.



The table lists the key entries for each overlay territory. Note the following:

- The Territory Type is always set to **Overlay**.
- For the Sales Support Overlay territory, the values of both dimensions are blank. This ensures the territory is not assigned to any account or opportunity.
- The Enable Forecasting column for the overlay territories can be set to **Overlay Only**.

  Use **Overlay Only** if your overlay organization creates its own forecasts for the sales where they're involved. Such overlay forecasts are not counted as part of the sales organization forecasts to prevent double counting. If you do enable overlay forecasting, then you must set the value for manager territories that approve or adjust forecasts for both prime and overlay territories, such as US Product Sales, to **Prime and Overlay**. Enabling forecasts by overlay territories also requires additional setup so salespeople can specify overlay credit on the opportunity UI itself. See the Implementation Reference guide for details.

Territory Name	Territory Type	Address	Product	Enable Forecasting
US Product Sales	Prime	Any	Any	Prime or Prime and Overlay
Sales Support Overlay	Overlay	Blank	Blank	Overlay Only
Sentinel Server Overlay	Overlay	Any	Sentinel Servers	Overlay Only
Green Server Overlay	Overlay	Any	Green Servers	Overlay only

Child territories automatically inherit the coverage of their parent when you create them, so, for the Sales Support Overlay territory, you must delete the inherited coverage as described in Creating a Territory with No Coverage topic.

How Assignment Works for This Scenario

The application assigns both the prime and overlay territories at the same time. Here is the detail for the assignment of overlay territories:

- The application assigns both the Sentinel Server Overlay and Green Server Overlay territories to all accounts because the Address dimension is set to Any. This provides the overlay team access to account notes, activities, and other details they need if they engage with the account.
- The application assigns the Sentinel Server Overlay and Green Server Overlay territories only to opportunities with server products in those two product groups.

What to Do When You Don't Want Executives Handling Catchall Territories

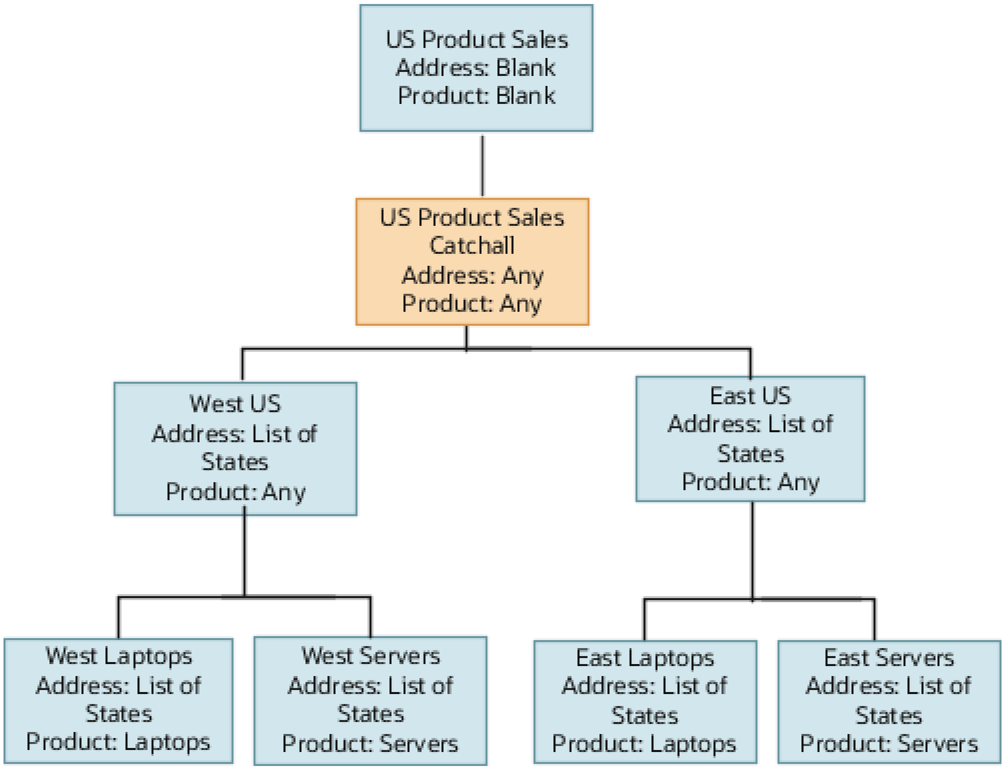
If you don't want your execs troubleshooting account and opportunity assignment, read on. Catchall territories are territories high up in the territory hierarchy that have a value of Any for some or all of the territory dimensions.

Your organization must monitor the catchall territories to identify and reassign records with incomplete data and to adjust for any gaps in your territory structure. The territories at the top of your hierarchy are usually owned by sales executives who aren't involved in territory troubleshooting. You can make it possible for others to manage the troubleshooting in either one of two ways:

- You can add the sales administrator as a member of the top catchall territory. As a territory member, the sales administrator can troubleshoot assignment.
- You can create two territories: one for the executive and one for the administrator right underneath in the hierarchy. The executive's territory gets a blank coverage (no coverage), so no accounts or opportunities are assigned. The administrator gets the catchall territory, with Any as the value for the appropriate dimensions.

When you create separate territories, the executive can review and adjust all the forecasts from the sales team. The owner of the catchall territory gets to troubleshoot any accounts or opportunities that aren't properly assigned. You can turn off forecasting for the catchall, so that the catchall territory owner doesn't see the forecasts the executive is approving.

Here's a diagram of a sample territory hierarchy with a separate overall catchall territory. The separate overall catchall territory, US Product Sales Catchall, is a child of US Product Sales and the parent of the next level of territories: West US and East US. A catchall must be a parent node. It cannot be a leaf node in the hierarchy.



Here are the setup details for the territories. A value of Blank for the top territory means that you removed coverage, assuring that no accounts or opportunities are assigned to that territory. Entering the value Overlay Only in the Enable Forecasting field for the catchall territory, disables access to revenue forecasting for the territory owner.

Territory Name	Territory Type	Address	Product	Enable Forecasting
US Product Sales	Prime	Blank	Blank	Prime
US Product Sales Catchall	Prime	Any	Any	Overlay only
West US	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Any	Prime
West Laptops	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ	Laptops	Prime

Territory Name	Territory Type	Address	Product	Enable Forecasting
		And entries for all the remaining 22 states in the western half of the US		
West Servers	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Servers	Prime
East US	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Any	Prime
East Laptops	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Laptops	Prime
East Servers	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Servers	Prime

How to Get Rid of the Owner Field and Rely on Automatic Assignment Exclusively

If you want to rely on sales territories or assignment rules to provide access to accounts, opportunities, and leads, you have to get rid of the owner field using Oracle Visual Builder Studio. That's because you can't automatically assign ownership of accounts, opportunities, and leads.

Whoever creates a record becomes its owner and ownership provides edit access to data, including the ability to assign others to the sales team and reassign ownership.

If you're concerned about unauthorized access by owners, you can create a dummy user and assign ownership of all records to that dummy resource. Whatever solution you explore, you must keep in mind that the owner field assures that the creator of a record retains access to that record.

How to Provide Managers in Completely Different Sales Regions with Access to Everything

Accounts for large multinational corporations are typically assigned to sales teams in different countries or regions. That creates a problem. By default, managers in each region can only access information in their own region.

No single manager can access all of the accounts and opportunities for the entire multinational. You can use a combination of account hierarchies and sales territory setup to provide access. By including the account at the top of the multinational hierarchy in the territory of a manager, you provide edit access to all accounts and opportunities in the hierarchy, regardless of where the're located. Managers get access to the account you include in the territory, and to all the accounts below it in the hierarchy. So, you can also use this method to provide access to a subset of the hierarchy.

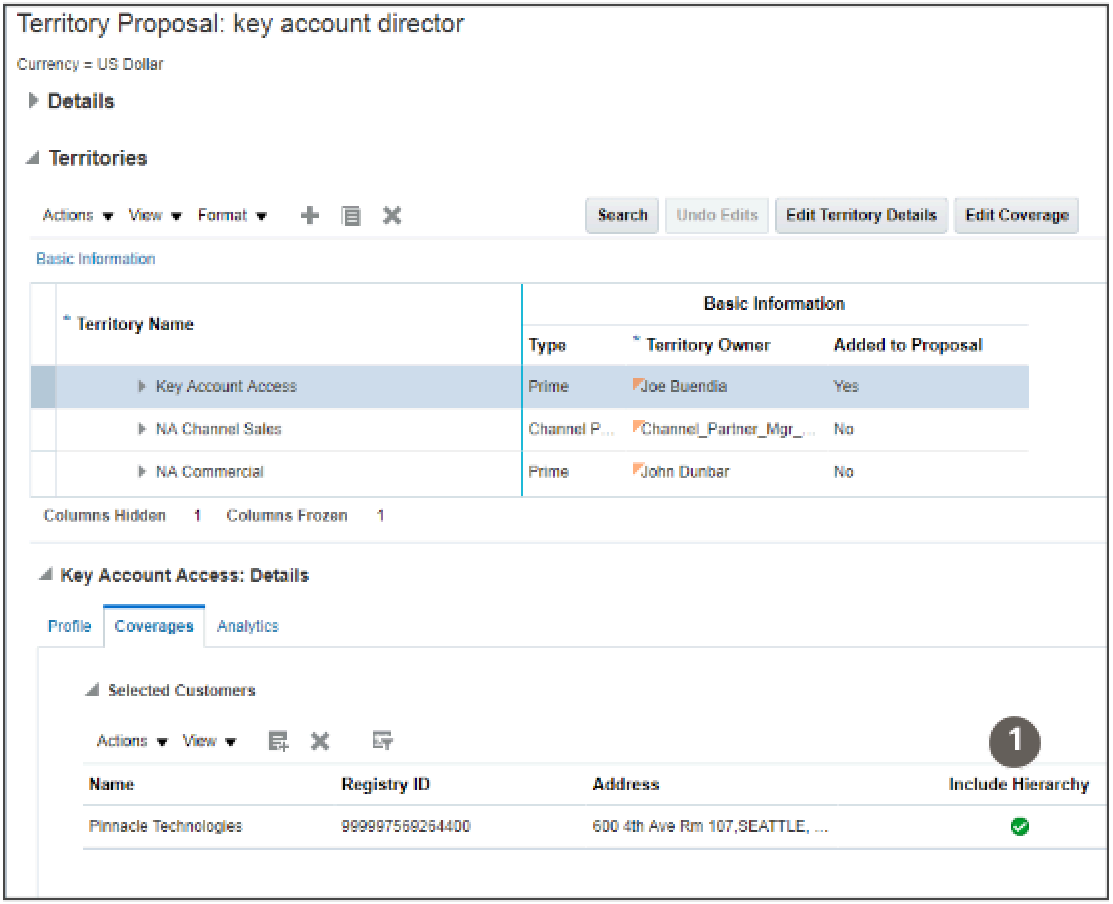
Setup Summary

1. Create the account hierarchy either directly in the Edit Account UI or by importing the hierarchy as described in this guide.
2. Include the top account or another account in the hierarchy:

    a. Create the territory in a territory proposal.
    b. On the Coverages tab in the Included Customers, Selected Customers region, click **Select and Add**.
    c. In the Select and Add window, search for the account by name or other criteria.
    d. Click **Save and Close** to include the account and return to the Coverages tab.
    e. Select the account and click **Include Hierarchy**.

        The Include Hierarchy indicator appears in the Include Hierarchy column.

        Here's a screenshot of a sample territory in the Territory Proposal page with the Pinnacle Technologies account included on the Coverages tab. The presence of the Include Hierarchy indicator (callout 1) means that the territory owner has edit access to all of the accounts in the hierarchy below the Pinnacle Technologies account.



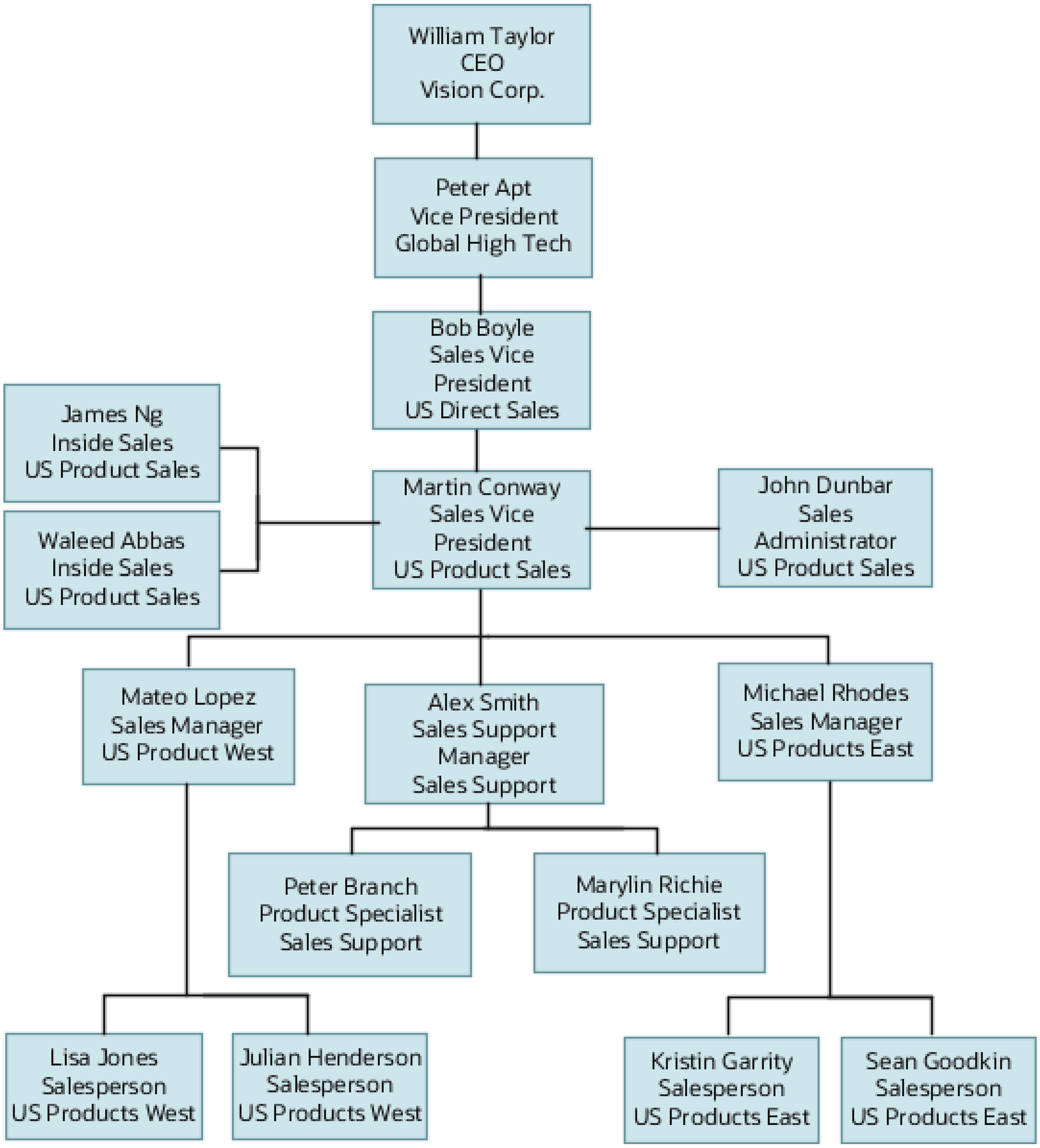
Sales Territory and Assignment Setup for the Vision Corp. Use Case

This topic explains the use case for the sales territory setup detailed in this chapter. The fictitious Vision Corp. divides its field sales organization for the US into two regions, East and West.

Each regional sales organization includes two salespeople, one sells laptops and the other servers. A sales support organization helps out with sales of technically complex server products. The organization includes a sales administrator who monitors and refines the territory assignment and two inside sales representatives who qualify leads.

The Organization and Use Case

Here's the Vision Corp. sales resource hierarchy you set up earlier.



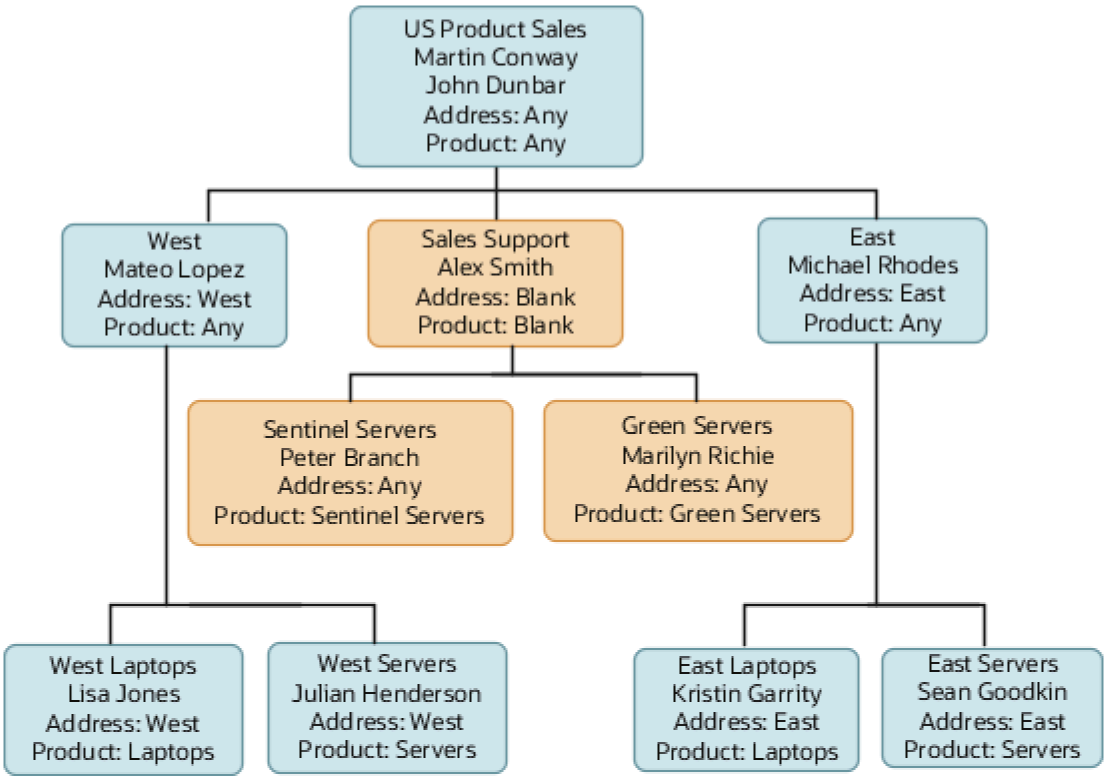
Sales Territory Setup

Vision Corp. creates territories using the address and product dimensions. Here's a diagram that shows the sales territory structure:

- The top territory, US Product Sales, is the overall catchall territory.

  The territory is owned by Martin Conway and includes the sales administrator John Dunbar. John Dunbar can troubleshoot any accounts and opportunities that are assigned to the overall catchall territory and also to the West and East catchall territories. By monitoring the catchall territories, John can refine the territory structure over time and fill in any gaps.
- The Sales Support territory owned by Alex Smith has blank (no value) entries for Address and Products coverage. No accounts and opportunities are assigned to him because he only manages the product specialists working for him.

- Peter Branch and Marilyn Richie are assigned to help with opportunities that involve their products, Sentinel Servers or Green Servers.
- The inside sales representatives don't have any territories because they qualify leads assigned to them using rules you set up as part of the Leads chapter.



Here are the key entries for the territories:

- Entries in the Product dimension column are the product groups in the sales catalog. Selecting a product group includes all the product groups and products nested within the product group.
- Vision Corp. is forecasting sales only. There's no forecast for the sales support organization. For this reason, the Enable Forecasting column value for the overlay territories is set to Overlay Only. For the prime territories, the value is Prime Only.
- The Sales Support territory has no coverage values so it doesn't get assigned to any accounts and opportunities. Because each child territory automatically inherits the coverage of its parent, you must delete the coverage to make it blank. For details, see the Create a Territory with No Coverage topic.

Territory Name	Territory Owner	Territory Type	Address	Products	Enable Forecasting
US Product Sales	Martin Conway John Dunbar	Prime	Any	Any	Prime only
East	Michael Rhodes	Prime	Arkansas and all the other states in the eastern US	Any	Prime only

Territory Name	Territory Owner	Territory Type	Address	Products	Enable Forecasting
East Laptops	Kristen Garrity	Prime	Arkansas and all the other states in the eastern US	Laptops	Prime only
East Servers	Sean Goodkin	Prime	Arkansas and all the other states in the eastern US	Servers	Prime only
Sales Support	Alex Smith	Overlay	Blank (no value)	Blank (no value)	Overlay only
Sentinel Servers	Peter Branch	Overlay	Any	Sentinel Servers	Overlay only
Green Servers	Marilyn Richie	Overlay	Any	Green Servers	Overlay only
West	Mateo Lopez	Prime	Alaska and all the other states in the western US	Any	Prime only
West Laptops	Lisa Jones	Prime	Alaska and all the other states in the western US	Laptops	Prime only
West Servers	Julian Henderson	Prime	Alaska and all the other states in the western US	Servers	Prime only

How It Works

Vision Corp. runs the assignment process once a day in off-peak periods to assign new accounts or opportunities and qualified leads. Here's an outline of how assignment works for accounts:

- The application assigns an account to both the prime and overlay territories using the state the account is located in. A new account in Alaska gets assigned to West Laptops, West Servers, Sentinel Servers, and Green Servers territories. The owners and members of these territories gain access.
- If the account information is missing a state for some reason or is in a country other than the US, then the application assigns the account to the US Product Sales. Sales administrator John Dunbar reviews and troubleshoots the accounts assigned to this catchall territory.

The application assigns opportunities and qualified leads using the address information from the account and the product in each opportunity. For forecasting purposes, each opportunity line is assigned individually to territories and the territory owner gets to forecast only that line, but the territory owner gains edit access to the whole opportunity and the territory is listed on the opportunity Sales Team tab:

- An opportunity for green servers in an Alaska account, gets assigned to the West Servers prime territory and to the Green Servers overlay territory.
- An opportunity for laptops in the same Alaska account, gets assigned to the West Laptops prime territory only.

- An opportunity for both green servers and laptops in the same Alaska account, gets assigned the West Laptops, West Servers prime territories and the Green Servers overlay territory. All three territory owners gain edit access to the opportunity and the territories show up in the opportunity Sales Team tab. Although each territory member gains access to the opportunity as a whole, the forecasts for each of the prime territories include only their specific products.
- If an opportunity for the Alaska account includes a product not included in any of the territory coverages, then the application assigns the West territory.

Enable Sales Territory Dimensions

You must enable the sales territory dimensions that you plan to use for your sales territories. Make sure you complete any prerequisites for the dimension you want to use.

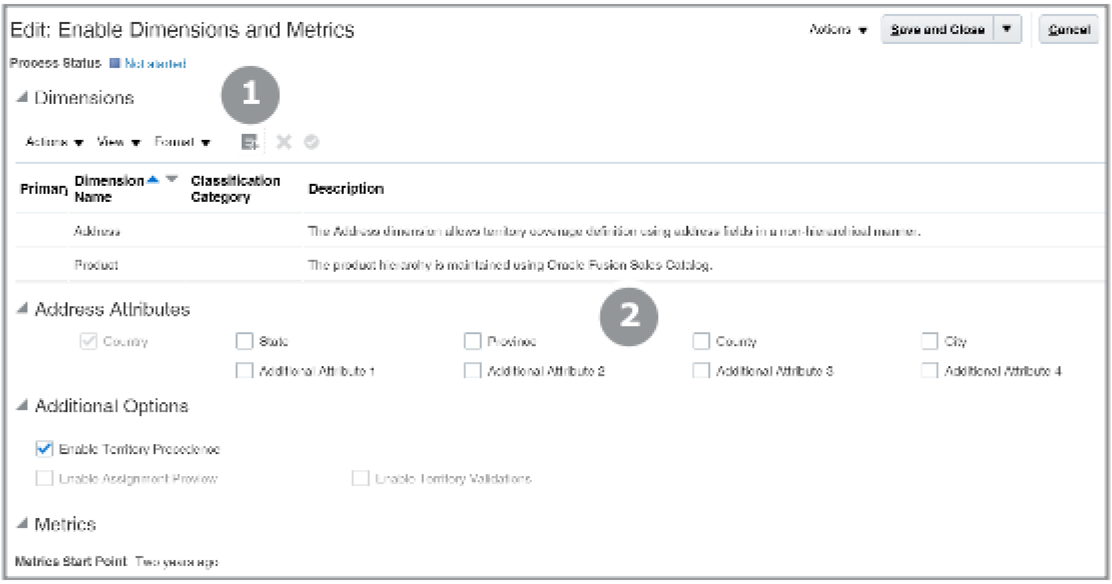
For example, if you want to enable the product dimension, then you must first create the sales catalog and you must run the Refresh Denormalized Product Catalog Table for BI process.

1. Open the task **Enable Dimensions and Metrics** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Territories
    - Task: Enable Dimensions and Metrics
2. On the Enable Dimensions and Metrics page, click **Edit**.
3. In the Dimensions region, click **Select and Add**.

4. Select the dimensions that you want to use and click **OK**.
   Vision Corporation adds **Address** and **Product**.

   > **Note:** If you add the Address dimension, the application displays a warning that you can't use territory metrics. Click **Yes** because you don't need these features.

   Here's a screenshot of the Edit: Enable Dimensions and Metrics page highlighting the location of the **Select and Add** button (callout 1) and the Address Attributes (callout 2) section where you select the address elements you want to use in territory setup.



5. If you added the Address dimension, select the address elements you want to use to set up your territories, such as state, city, or postal code. Our simple Vision Corp. example uses state only.
6. From the Actions menu at the page level, select **Load and Activate**.
   Your selection runs a process that loads the required dimension data. This is a one-time action unless you make changes in the territory dimensions after running the process. If you do make changes later, if you add dimensions or decide to change the industry classification for accounts, for example, then you must load and activate again.

You can select **Refresh Status** from the Actions menu at the page level to monitor the process progress. When the process completes successfully, you can start defining territories in the application.

Create the Sales Territory Hierarchy

Create a Territory Proposal

Here's how to create a territory proposal. A territory proposal is the sandbox where you create the sales territory hierarchy.

1. Navigate to the Territories work area.
2. Click the **Sales Territories Hierarchy** tab.

3. On the Active Territories page, click **Manage Proposals**.
4. In the Manage Territory Proposals page, Current Territory Proposals region, click **Create** (the plus sign icon).
5. In the Create Territory Proposal window, enter a name for the proposal.
6. Leave the **Activation Date** field blank. You want the proposal to be activated immediately after you build your territories.
7. Click **Save and View**.

Your territory proposal opens and you can start building your territory hierarchy.

Create the Sales Territory Hierarchy

With your territory proposal open, create the sales territory hierarchy starting with the top territory. For each territory you create, enter the name of the salesperson or manager who owns the territory, and the values for the dimensions that form the territory boundaries.

When you create child territories, the application automatically copies all the dimension values from the parent territories to speed up entry.

Create the Overall Catchall as the Top of the Hierarchy

Here's how to create the territory at the top of the sales territory hierarchy as the overall catchall territory. The top territory is usually owned by a senior manager or executive. Because you don't want executives troubleshooting territory assignment, you must add a second resource to do the troubleshooting.

1. In the Territories region of your territory proposal, click **Create**.
2. On the Create Territory page, enter the territory name, for example, `US Product Sales`.
3. Enter the resource who is the owner of the top territory, most likely the VP of Sales:

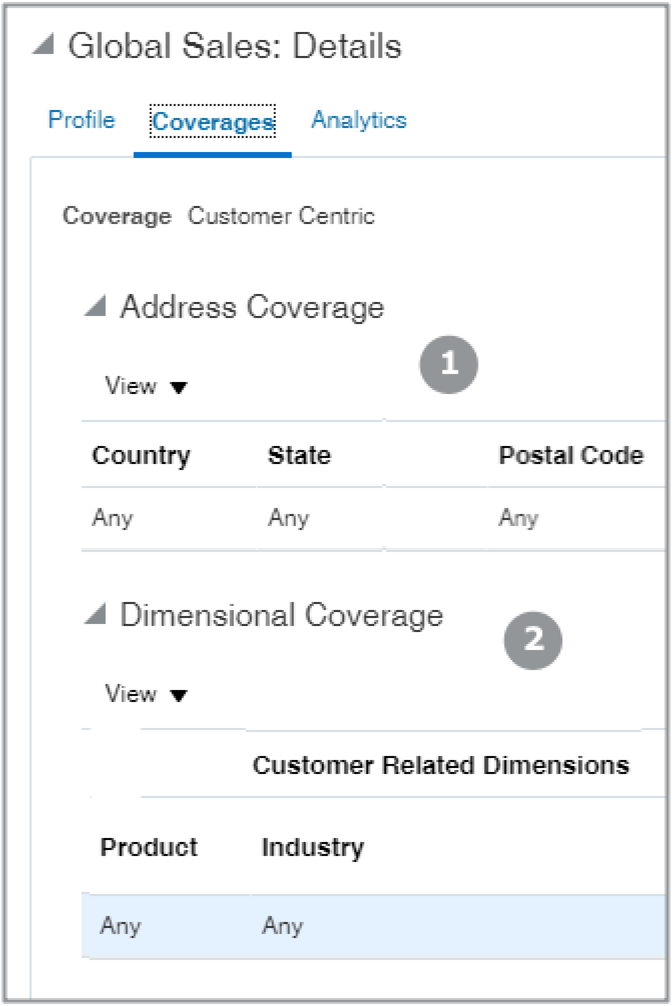
   a. From the **Owner** list, select **Search**.
   b. Search for the resource name using any of the criteria.
   c. Select the name and click **OK**.

   The owner is now listed on the Territory Team tab in the Additional Information section at the bottom of the Create Territory page.
4. From the **Type** list, select **Prime**.
5. From the **Enable Forecasting** list, select **Prime only**. This setting enables the territory to be used for forecasting.
6. Now add the sales administrator or another resource for troubleshooting any accounts and opportunities that get assigned to the catchall territory.

   a. In the Territory Team tab in the Additional Information region, click **Select and Add** (the document icon with a plus sign).
   b. Search for the resource using any of the fields.
   c. Select the resource from the search results and click **OK**.
7. Click **Save and Close**.

   Your new territory appears in the Territories table of your proposal.

8. With the territory selected in the Territories table, click the Coverages tab in the Details region at the bottom of the page.



The Address Coverage section (callout 1 in the screenshot) lists the address elements you enabled for territories, all with the value of Any. The Dimensional Coverage section (callout 2), includes all of the other dimensions you are using, also with the value of Any for each. A setting of Any is what you want for your overall catchall territory.

Note: If the Coverages tab is blank, then your territory configuration is incomplete. Navigate to Scheduled Processes and check to see whether the Synchronize Stage Environment process completed successfully. See the topic Enable Territory Dimensions for more information.

You're now ready to add the rest of the territory hierarchy.

Add the Rest of the Hierarchy

With the territory proposal open, add the rest of the sales territory hierarchy from the top down. Here's how to add a territory:

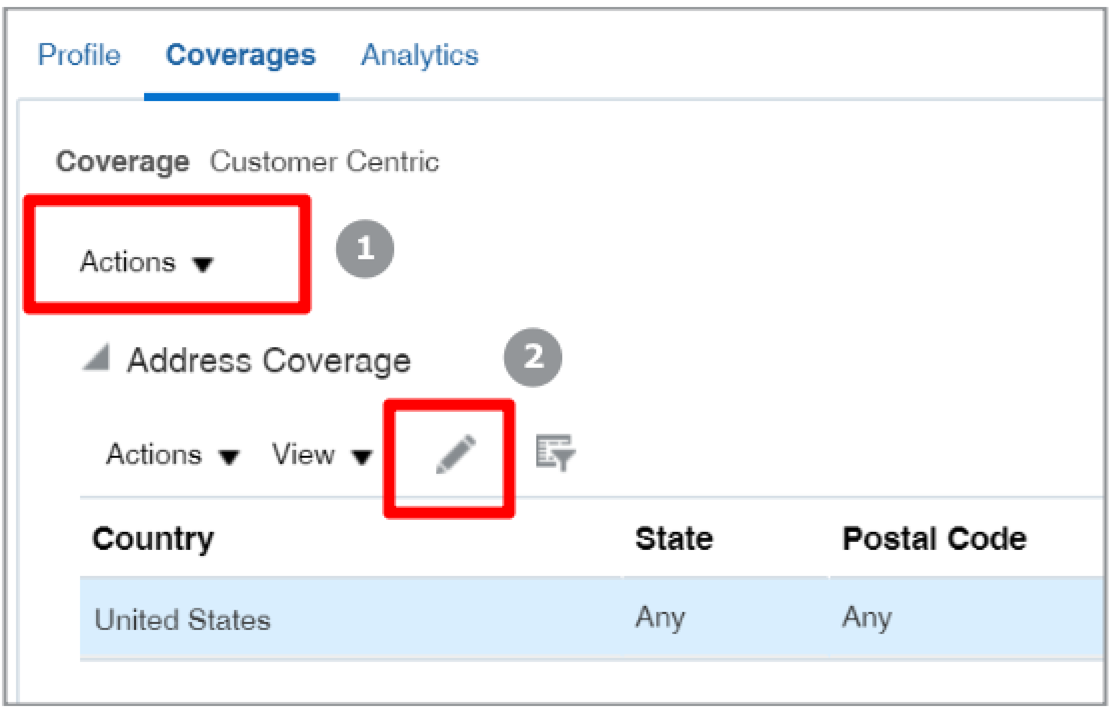
1. Select the parent territory in the Territories table.
2. Click **Create Child of Selected Territory** (the plus sign icon).

3. On the Create Territory page, enter the territory name.
4. Enter the owner for the territory.
5. Select the territory type, either **Prime** or **Overlay** depending on the territory you're creating.
6. From the **Enable Forecasting** list, select **Prime only** for territories involved in forecasts. For overlay territories, select **Overlay only**. This setting removes the territory from forecasting.
7. Click **Save and Close.**

   You're returned to the Territory Proposal page. You're now ready to enter the values for the different territory dimensions.
8. If you're creating a territory with no coverage, then select the territory in the Territories table and do the following:

   a. In the Coverages tab, select a row showing coverage values.
   b. From the Actions menu, select **Remove all**.

   Here's a screenshot of the Coverages tab. Callout 1 highlights the location of the Actions menu.



   The coverage now shows a **No data to display** message.

9. If you're creating a territory with coverage, then select the territory in the Territories table, and enter the values for the dimensions:

    a. For the address dimension, do the following:

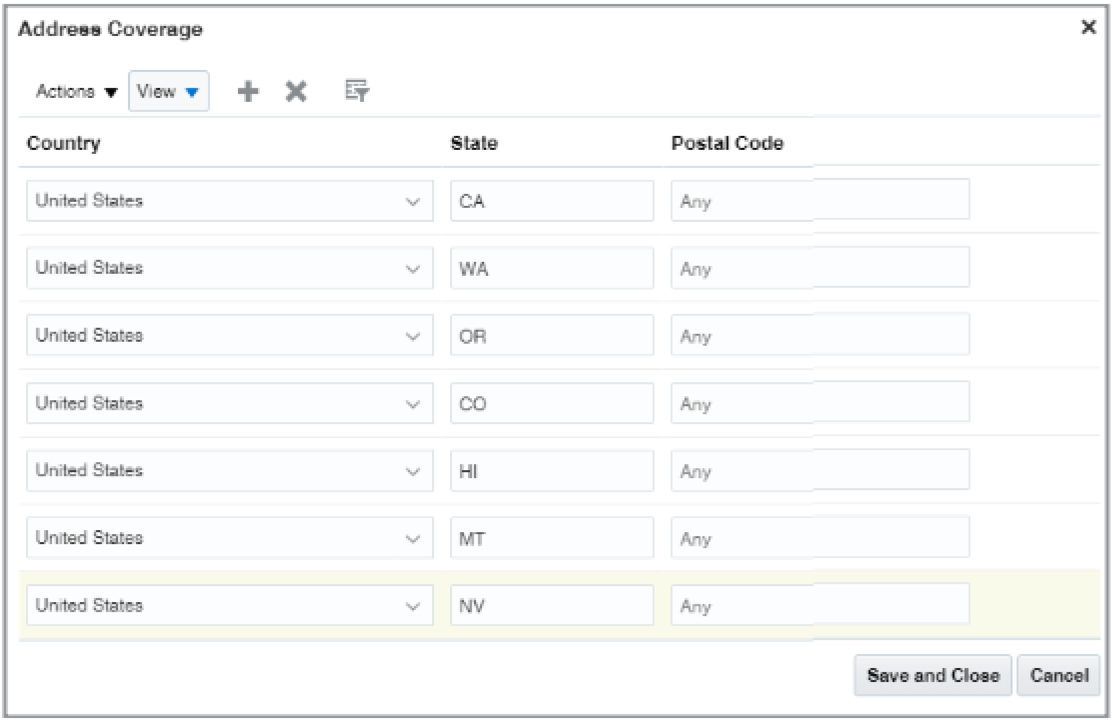
        i. In the Address Coverage section, select any row and click **Edit** (the pencil icon, callout 2 in the screenshot).

           Your action opens up a separate window to enter all of the address values for the territory.

        ii. In the separate Address Coverage window, click **Add** and enter the values for each address element. Add as many rows as you need to cover all the possible address values in your data:

            - Except for the Postal Code field, the application matches your entries exactly, but the matches are not case-sensitive. If your data includes a variation of spellings, then you must add rows for them all. For example, if your data includes `CA`, `California`, and `Ca.`, then you must include a row for each spelling variation to assure correct assignment.

Here's a screenshot of the Address Coverage window with a row for each of the different states in a western US territory.



- If you are creating territories using postal codes, such as US ZIP codes, you can enter ranges of values and use the percent sign (%) to indicate partial matches.

b. Here's how to enter values for the other dimensions in the Dimensional Coverage section:

i. In the Dimensional Coverage section, click **Edit**.

ii. Select the dimension from the **Dimensions** list.

The Edit Coverage window shows a list of available values in the left Available Dimension Members pane.

iii. Move the values you want to use for the territory to the Selected Dimension Members pane on the right.

> **Tip:** If the Product dimension shows the wrong products, go to the Scheduled Processes work area and run the Refresh Denormalized Product Catalog Table for BI process. The wrong products may show up if you changed the root of your sales catalog.

iv. Click **Save and Close**.

You're returned to the Territory Proposal page.

After you complete adding territories and specifying coverages, you're ready to activate your territory proposal.

Activate the Territory Proposal

You can activate your territory proposal right away after you complete building your territory hierarchy. Just click Activate while still editing the territory proposal. If you didn't, no worries. You can activate the proposal from the Manage Territory Proposals page. Here's how:

1. Navigate to the Territories work area.
2. Click the **Manage Territory Proposals** link.
3. If the proposal you want to activate doesn't appear on the Manage Territory Proposals page, in the Current Territory Proposals table, select **All Proposals** from the **Proposals** list.
4. Select the proposal and click **Activate**.

   The application displays the proposal in the Completed Territory Proposals region. You can refresh the page to display the most recent status and navigate to the Territories page to view the territories after they are active.

Create a Territory with No Coverage

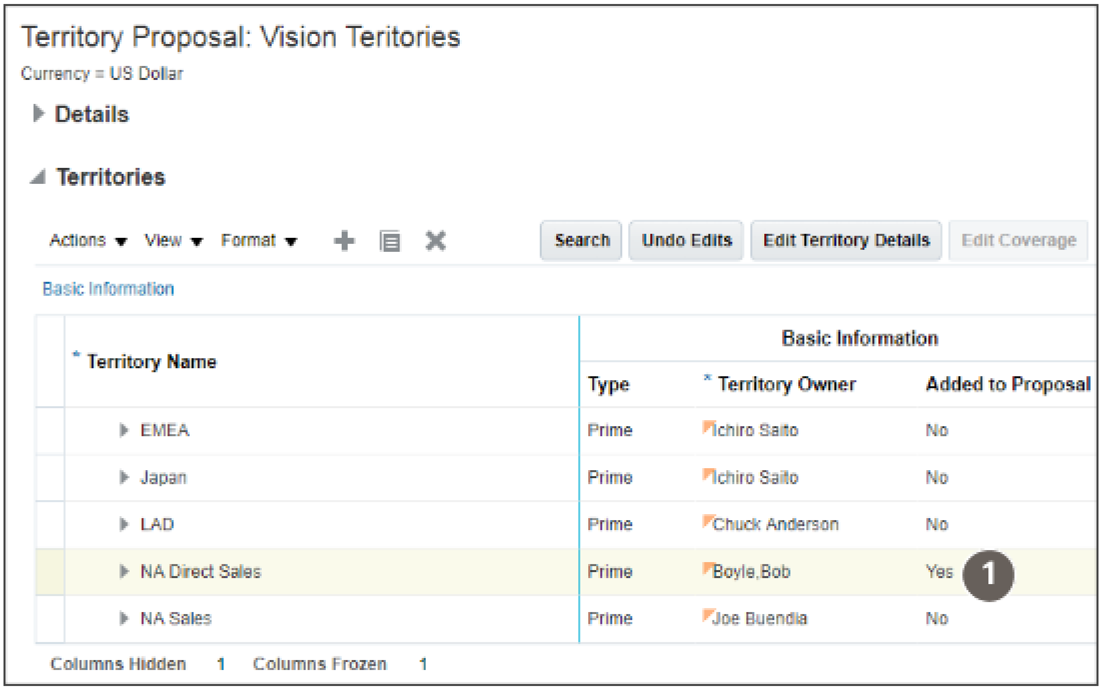
Sometimes you need to create a territory to group other territories for forecasting or you want to forecast accounts that are included in a territory by name. In these cases, you don't want any accounts or opportunities assigned to the territory.

You can create territories that are skipped by the assignment process by deleting the coverage across all territory dimensions. You can only delete coverage while you're in a territory proposal and you must delete coverage across all the dimensions in a territory. You can't delete coverage for individual dimensions.

Here's how to create a territory with no coverage:

1. In the territory proposal, Territories region, select the territory you want to turn into a territory with no coverage. Make sure it's added to the proposal.

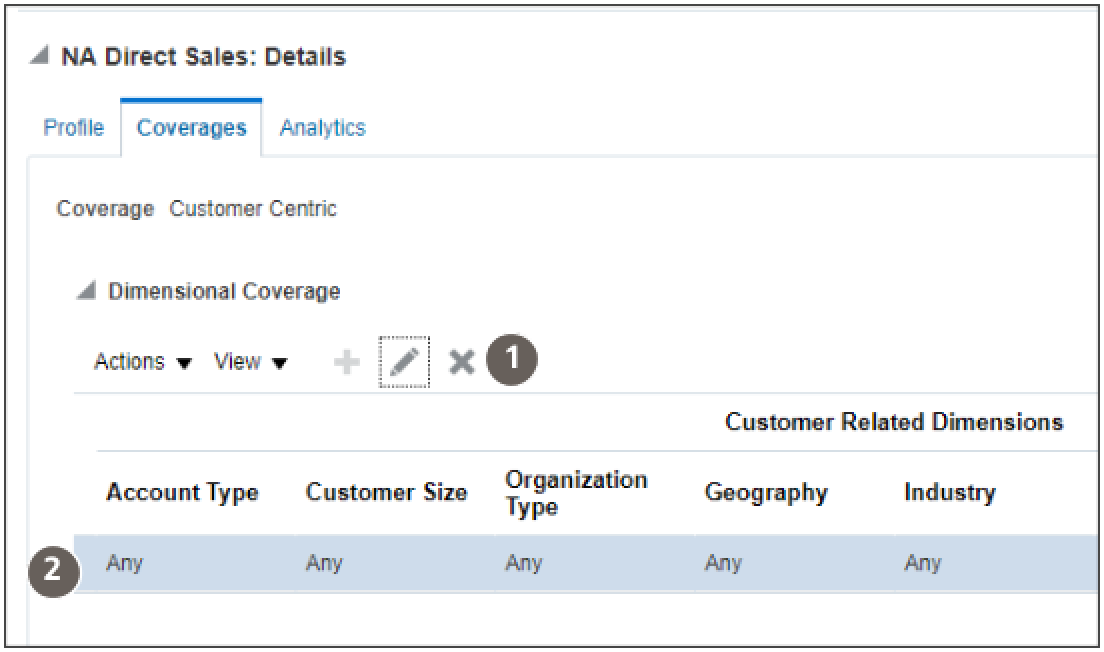
   A Yes in the Added to Proposal column indicates that the territory is in the proposal. Here's a screenshot of the Territories region of a sample territory proposal highlighting the column.

2. In the Details region, select the **Coverages** tab.

3. Select the row showing the coverage values in the Dimensional Coverage region on the tab.

   Here's a screenshot of the Territory Proposal window with the Coverages tab. Callout 2 shows the location of the row of values you delete to create a territory with no coverage. Callout 1 indicates the location of the **Delete** icon.



4. Click **Delete**.

   The application warns you that your action will remove all data in the table.
5. Click **Yes** in the warning.

   The entire row is deleted.
6. Save.

Enable Automatic Assignment of Imported Accounts

Enable automatic sales territory assignment of accounts you import by setting the following system profile options to Yes. Setting the profiles to Yes, runs the Request Account Assignment process after import. By default, you must run the process manually to assign accounts.

System Profile Option Name	Description
Sales Account Automatic Assignment on Import Enabled (ZCA_BATCH_ASSIGN_ON_BULK_IMPORT)	Enable automatic sales territory assignment after you import accounts.
Sales Account Automatic Assignment on Create Enabled (ZCA_SA_AUTO_ASSIGN_ON_CREATE)	Enable automatic sales territory assignment of new accounts after you import accounts.

System Profile Option Name	Description
Sales Account Automatic Assignment on Update Enabled (ZCA_SA_AUTO_ASSIGN_ON_UPDATE)	Enable automatic sales territory assignment whenever accounts are updated when you import.

1. In Setup and Maintenance, go to the **Manage Administrator Profile Values** task:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. Search for each of the profile options.
3. Set the **Profile Value** to **Yes**.
4. Click **Save and Close**.

Make Opportunity Assignment Automatic

You can make the assignment of opportunities automatic by setting the system profile option Assignment Submission at Save Enabled. By default, sales users must assign opportunities manually when they edit each opportunity.

1. In Setup and Maintenance, go to the **Manage Opportunity Profile Options** task:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options
2. In the Manage Opportunity Profile Options page, search for the profile option by entering `Assignment Submission at Save Enabled` in the **Profile Display Name** field.
3. In the MOO-OPTY_ENABLE_AUTO_ASGN: Profile Values region, select **Yes** from the **Profile Value** list.
4. Click **Save and Close**.

Run Assignment Processes

Run the Account Assignment Process

You must run the Request Account Assignment process to assign territories to accounts each time you activate a territory proposal. You must also schedule this process to run regularly to ensure that all territories are assigned properly.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, enter `Request Account Assignment` in the **Name** field and press **Return**.
4. Select the process and click **OK**.
5. On the Process Details page, make these entries to assign all records:

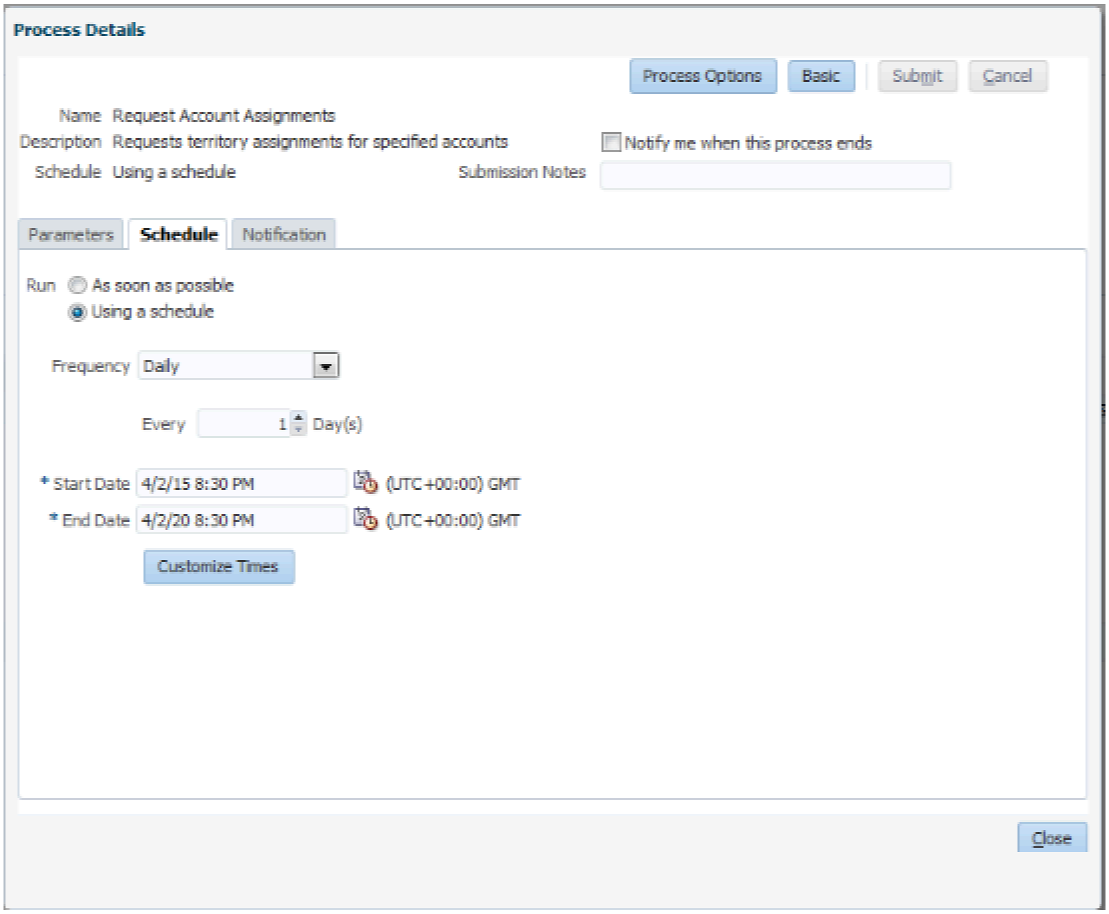
Field	Entry
Work Object	Account
Candidate Object	Account Territory
Assignment Mode	Territory
View Criteria Name	`AllSalesAccountsVC`.

> **Note:** You can run the assignment process on a subset of records by entering different parameters in the **View Criteria Name** and **View Criteria Bind Values** fields.

6. The first time you run the process click **Submit** to run it immediately.

7. You must also set up the process to run regularly, perhaps once a day:
    a. Click **Advanced**.
    b. Click the Schedule tab.
    c. Select the **Using a schedule** option.

        Here's a screenshot of the Process Details page with the Schedule tab and the Using a Schedule option selected.

    d. Select the frequency and start date.
    e. Enter an end date far in the future.
    f. Click **Submit**.
8. Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the process by name on the Overview page.

Run the Opportunity Assignment Process

You must run the Request Revenue Territory Assignment process to assign territories to opportunities after you activate a territory proposal. You must also schedule this process to run daily to ensure that all territories are assigned properly.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.

3. In the Schedule New Process dialog, **Name** field, click **Search: Name** icon (down arrow) and select the **Search** link at the bottom of the list.
4. In the Search and Select dialog, enter the process name `Revenue Territory`, and click **Search**. You can search by a partial name, but note that the search is case-sensitive.
5. Select the process name in the results and click **OK**.
6. Click **OK** again, if required.
7. Enter these process parameters:

Field	Entry
View Criteria Name	Enter `OpenOpportunitiesByCreationDate`.
View Criteria Bind Values	You can have the option of assigning territories to those open opportunities created since a certain date or those created for a range of dates: ◦ For a specific date, enter `BindOptyCreationDateFrom=YYYY-MM-DD` where YYYY-MM-DD is the date you started implementing the application. For example, `BindOptyCreationDateFrom=2014-01-01` assigns all open opportunities created since January 1, 2014. ◦ To use a date range, enter `BindOptyCreationDateFrom=<date>, BindOptyCreationDateTo=<date>`. Note that the From and To values are separated by a comma.

> **Note:** You can find information about additional process parameters in the Implementation Reference guide.

8. You must also run this same process periodically to assign new opportunities
   a. Click **Advanced**.
   b. Select the Schedule tab.
   c. Select the **Using a schedule** option.
   d. Select the frequency and start date.
9. Click **Submit**.
10. Unless you specified a schedule, your process runs immediately. You can monitor its progress by searching for the process by name on the Overview page.

Related Topics

- Recommendations for Assignment Processes for Opportunities

Recommendations for Assignment Processes for Opportunities

You can use two processes for opportunity assignment. You use one for territory-based assignment and one for rule-based assignment.

The two assignment processes related to opportunity assignment are:

- Request Revenue Territory Assignment: Run this process if you're using territory-based assignment.
- Request Opportunity Resource Assignment: Run this process if you're using rule-based assignment.

Note: You run processes from the **Scheduled Processes** page, available from the navigator. You must have the role of Sales Administrator or a setup user to run scheduled processes.

When setting up the processes, you must enter specific **View Criteria** names and their **Bind Values**. The following sections list the parameters to use and some examples.

Request Revenue Territory Assignment Process

This table identifies the view criteria and view criteria bind values available for the opportunity revenue territory territory-based assignment process.

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
OpenOpportunitiesByCreationDate	Revenue lines of open opportunities created in the last 90 days. **Note:** The view criteria bind values aren't required for the default date range, 90 days. You can pass a different date range by entering View Criteria Bind Values.	• BindOptyCreationDateTo=[date],BindOptyCreation DateFrom=[date] • For example: BindOptyCreationDateTo= 2015-02-29, BindOptyCreationDateFrom =2015-01-01 • For example: BindOptyCreationDateFrom=2 This second example processes all open opportunities created between January 1, 2015, and the current date.	Daily
OpenOpportunitiesByEffectiveDate	Revenue lines of open opportunities that have an expected close date in the last 90 days. Optionally, the user can enter a different date range.	• BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date] • For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateTo =2015-02-29	Daily
SalesAccountUpdatedInLastNDays	Revenue lines of all open opportunities whose sales account was updated in the last 30 days. Optionally, the user can enter a different number of days.	• BindSalesAccountUpdated Since=[30] • For example, opportunities whose sales account was updated in last 15 days: BindSalesAccount UpdatedSince=15	Daily
SalesAccountUpdatedInLastNHours	Revenue lines of all open opportunities whose sales account was updated in the last number of hours. Optionally, the user can enter a different number of hours.	• BindSalesAccountUpdatedSinc • For example, opportunities whose sales account was updated within last 6 hours: BindSalesAccount UpdatedSinceHours=6	Multiple times per day
OpenOpportunitiesUpdatedInLastN	Revenue lines of all open opportunities updated within the	• BindOptyUpdatedWithinHours	Multiple times per day

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
	last four hours. Optionally, the user can enter a different number of hours.	• For example, open opportunities updated within the last 6 hours: BindOptyUpdatedWithin=6	
OpenOpportunitiesUpdated InLastNDays	Revenue lines of all open opportunities updated in the last 30 days. Optionally, the user can enter a different number of days.	• BindOptyUpdatedSince =[30] • For example, open opportunities updated in last 15 days: BindOptyUpdated Since=15	Daily
FilterByBatchTag	Revenue lines of all open opportunities that contain a specific value in the Batch Tag field.	• BindBatchTag =[text] • For example, open opportunities that have EMEA in the Batch Tag field: BindBatchTag =EMEA	Ad hoc run as per business requirements
RevenueImportCriteria	Revenue lines of all opportunities imported through the given bulk import batch ID. The view criteria bind value, BatchId, is mandatory.	• BindBatchId • For example: BindBatchId=5618782	Ad hoc run as per business requirements
FilterByOptyNumber	Revenue lines of an opportunity with a specific number.	• BindOptyNumber=<number> • BindOptyNumber=17001	Ad hoc run as per business requirements
ClosedOpportunitiesByCreationDate	Revenue lines of closed opportunities created in the last 90 days. Optionally, the user can enter a different date range.	• BindOptyCreationDateTo =[date], BindOptyCreation DateFrom =[date] • For example: BindOptyCreationDateTo =2015-02-29, BindOptyCreationDateFrom =2015-01-01	Daily
ClosedOpportunitiesByEffectiveDate	Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.	• BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date] • For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateT o=2015-02-29	Daily

Request Opportunity Resource Assignment Process

This table identifies the view criteria and view criteria bind values available for the opportunity resource rule-based assignment process.

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
OpenOpportunitiesUpdatedInLastN	All open opportunities which were updated in the last 30 days.	• BindOptyUpdatedSince=[30]	Daily

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
	Optionally, the user can enter a different number of days.	• For example, opportunities updated in last 15 days: BindOptyUpdatedSince=15	
OpenOpportunitiesUpdatedInLastN	All open opportunities updated within the last number of hours. Optionally, the user can enter a different number of hours.	• BindOptyUpdatedWithinHours • For example, open opportunities updated within the last 6 hours: BindOptyUpdated Within=6	Multiple times per day
OpportunityForImportBatchVO	All opportunities imported through the given bulk import batch ID. Value for BatchId is mandatory.	• BindBatchId • For example: BindBatchId=5618782	Ad hoc run as per business requirements
OpenOpportunitiesByCreationDate	Open Opportunities created in the last 90 days. Optionally, the user can pass a different date range.	• BindOptyCreation DateTo [date], BindOptyCreation DateFrom [date] • For example: BindOptyCreation DateTo=2015-02-29, BindOptyCreation DateFrom=2015-01-01 or BindOptyCreation DateFrom=2015-01-01. This second example processes all open Opportunities created between January 1, 2015 and the current date.	Daily
OpenOpportunitiesByEffectiveDate	Open opportunities that have an expected close date in the last 90 days. Optionally, the user can pass a different date range.	• BindEffective DateFrom [date], BindEffective DateTo[date] • For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29	Daily
SalesAccountUpdatedInLastNHours	All open opportunities whose sales account got updated within the last four hours. Optionally, the user can pass a different number of hours.	• BindSalesAccountUpdatedSinc • For example, opportunities whose sales account was updated within the last 6 hours BindSalesAccount UpdatedSinceHours=6	Multiple times per day
SalesAccountUpdatedInLastNDays	All open opportunities whose sales account got updated in the last 30 days. Optionally, the user can pass a different number of days.	• BindSalesAccountUpdated Since [30] • For example, opportunities whose sales account was updated in last 15 days: BindSalesAccount UpdatedSince=15	Daily
OpportunitySearchbyOptyNumber	The opportunity with a specific number.	• BindOpportunityNumber=<nu • BindOpportunityNumber=170(	Ad hoc run as per business requirements

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
ClosedOpportunitiesByCreationDate	Closed opportunities created in the last 90 days. Optionally, the user can pass a different date range.	• BindOptyCreation DateTo [date], BindOptyCreation DateFrom [date-90] • For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29	Daily
ClosedOpportunitiesByEffectiveDate	Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.	• BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date] • For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateT o=2015-02-29	Daily

Opportunity Assignment Implementation Considerations

Consider these points when scheduling opportunity batch assignment processes:

- Multiple Revenue Territory Territory Based Assignment and Opportunity Resource Rule Based Assignment processes can't run at the same time. If one of the processes is running and you submit another process (either Revenue Territory Territory Based Assignment or Opportunity Resource Rule Based Assignment), then the second process has a Paused status until the first job completes. Once the first process completes, the second process starts.
- For date-based view criteria, for example, OpenOpportunitiesByEffectiveDate, you don't have to enter the view criteria bind values if the default date range is used.
- For number-of-days-based view criteria, for example, OpenOpportunitiesUpdatedInLastNDays, you don't have to enter the view criteria bind values if the default number of days is used.
- If you enter view criteria bind values, the date format is YYYY-MM-DD.
- When scheduling opportunity batch assignment processes for the first time, if a process errors, you can try rescheduling the process and entering a lower value for the Maximum Sub Processes per Process parameter. The default value is 10. This ensures that each batch contains a small number of opportunities or revenue lines. If there's an issue with one of the opportunities or revenue lines, then the appropriate subprocess contains an error status and the other subprocesses completes successfully.

For more information on opportunity assignment, see the help. Use keywords "assignment", "territory-based assignment", and "rule-based assignment".

3 Advanced Sales Territory Topics

Overview of Territory Management Features

Sales territories form the fundamental infrastructure of sales management because territories define the jurisdiction that salespeople and channel managers have over accounts, contacts, households, partners, and associated transactions.

Territories provide the rules for automatically assigning salespeople and other resources to accounts, contacts, households, partners, leads, and opportunity line items. The structural hierarchy of territories defines resource responsibilities and controls access to customer and sales data.

> **Note:** If your salespeople forecast only the opportunities they own and you don't need to assign accounts, leads, or opportunities automatically by address or other criteria, then you can skip implementing territories.

Summary of Features

Territory Management includes these key features:

- Use territories as the basis for forecasting, quota distribution, compensation, and analysis of sales performance. Forecasts roll up according to the territory hierarchy.
- Use territories to assign resources and secure access to accounts, contacts, households, partners, leads, and opportunities.
- Assign channel sales managers to partners and partner transactions within their territories.
- Define territories by logical boundaries called dimensions. Examples of these include address, industry, product, customer size, sales channel, and organization type.
- Define territories by selecting a list of specific accounts, contacts, households, or partners.
- Model territory realignments and perform what-if analyses to find optimal territory changes.

Territory Concepts

Territory Benefits

Territories are foundation components that enable many key Sales Force Automation processes. These key capabilities can improve the overall performance of your sales organization.

- Model your sales organization hierarchy
- Assign the most effective resources to your accounts and opportunities
- Provide shared data visibility to encourage collaboration and team cross-selling
- Optimize sales coverage and maximize revenue with balanced territories

- Reduce territory administration costs and errors

How You Model Your Sales Organization

One of the most critical aspects of your implementation is the definition of the sales organization hierarchy and the assignment of your sales resources within this structure.

This structure represents how your sales force is organized internally and should be aligned with your sales strategy and how you sell in your marketplace. This structure drives data visibility for your sales users, rolls up the sales forecast, and aggregates data to measure performance at each level within your sales organization.

- A territory can represent the responsibility of a salesperson such as a set of customers
- A territory can represent the responsibility of a sales manager or executive such as a geographic region, line of business, product line, customer segment, or sales channel
- A territory can represent the responsibility of a channel account manager, including a specific set of partners and their respective sales activities
- A territory can represent a branch or a sales office responsible for selling to customers in a specific geographic region
- A territory can represent the jurisdiction of a channel partner such as authorizing the partner to sell a specific set of products to a set of customers

You organize territories in a hierarchy. While there is one single global territory structure for your entire enterprise, each branch of the overall structure represents a different part of the sales organization. The hierarchical relationship between territories at different levels defines how the data aggregation and visibility are rolled up.

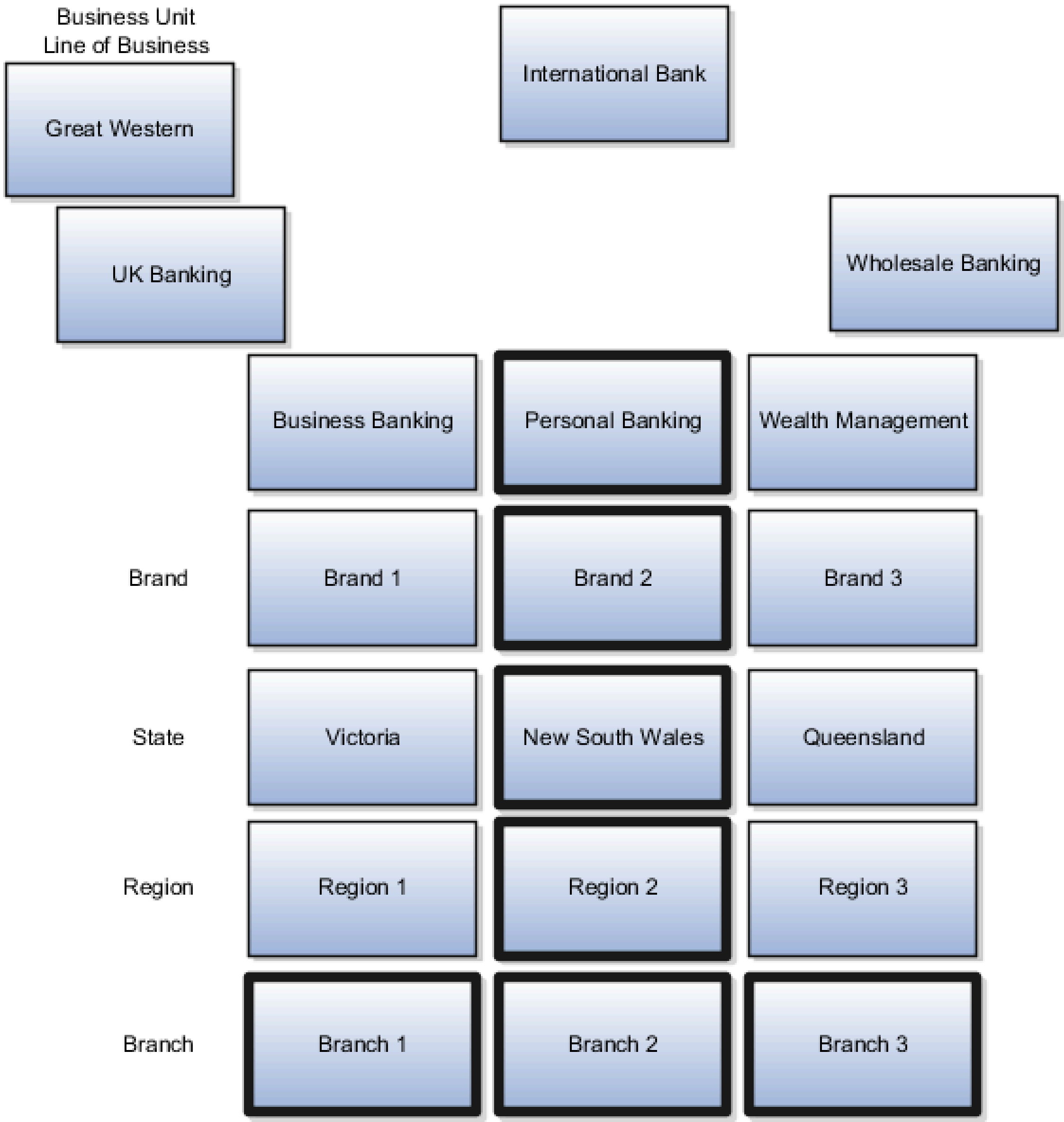
Each territory is associated with one or more sales resources for that territory. Each resource on the territory team may have a designated function based on the role that team member has in the context of that territory. A resource may be assigned to multiple territories with the same or different roles.

Financial Company Example

Depending on your specific industry and business model, a territory can be used to model any part of your sales organization. These examples illustrate different scenarios:

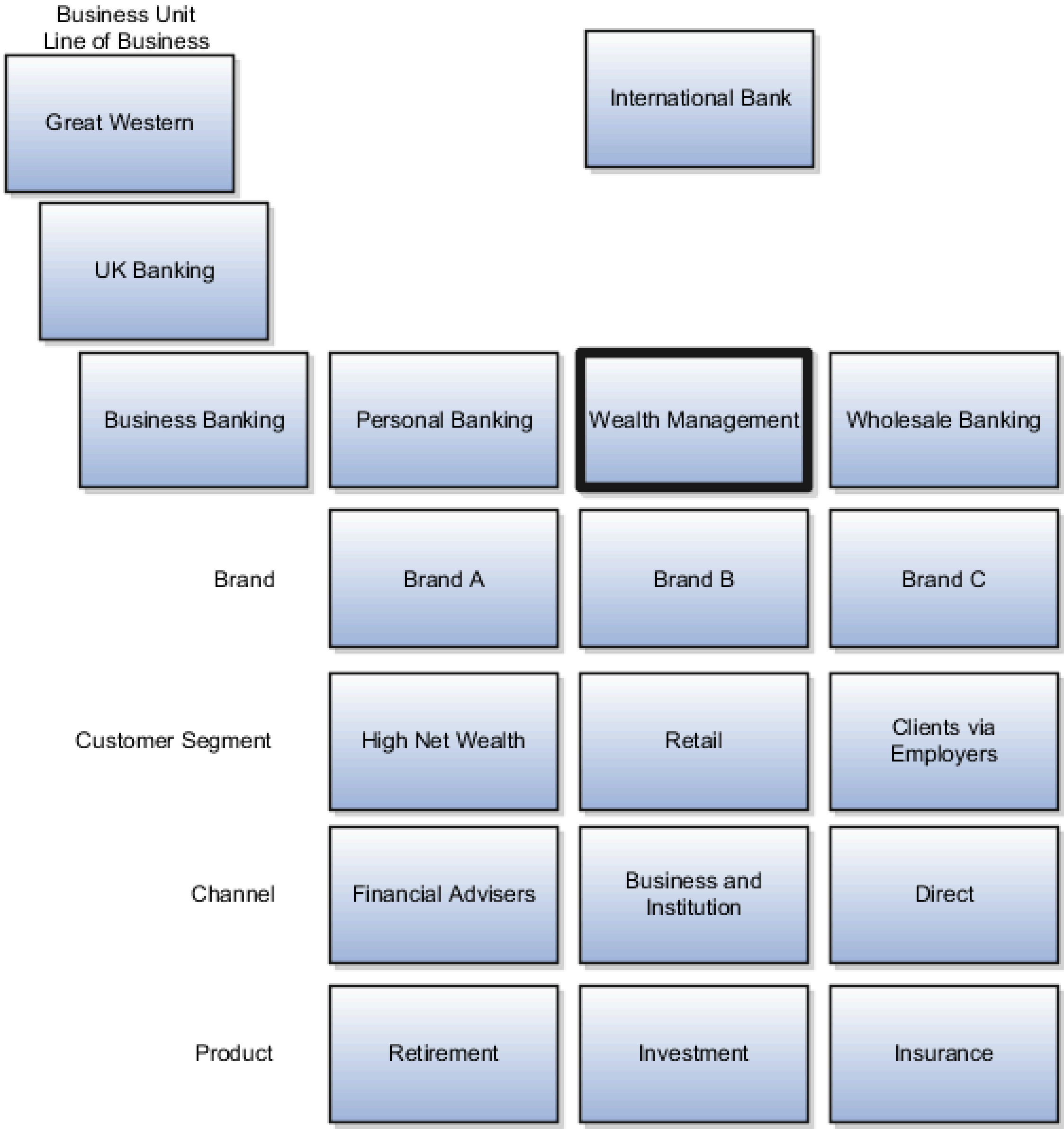
In this example, the International Bank has six lines of business which are business units:Great WesternUK BankingBusiness BankingPersonal BankingWealth ManagementWholesale BankingThis figure highlights the Personal Banking business unit and territory coverage:The Brand dimension is Brand 2.The State dimension is New

South Wales.The Region dimension is Region 2.The Branch dimension within Region 2 contains three branches.



The overall structure shows different lines of business. Within the Personal Banking line of business, territories are further broken down by brand, geography (state, and then region), and branch. Using this same example, the Wealth Management line of business is organized differently. The Wealth

Management line of business defines territories by brand, customer segment, channel, and product.



Automated Territory Assignment

Instead of manually choosing an owner for each account, lead, or opportunity line, you can use territories to automatically assign objects to the territory teams. Territories are assigned to objects by matching territory coverage with the attribute values of the object.

Territory Coverage

Territory coverage defines the boundary of each territory and describes the business rules by which assignments are made. You have three types of coverage:

- Dimensional Coverage

  This is a combination of dimensions with a list of values for each dimension. A territory dimension is mapped to an attribute on transactional objects during assignment processing. For example, the address dimension on the territory is mapped to the address of the account or the partner. The following standard dimensions are provided: address, product, industry, account type, organization type, customer size, and sales channel. Three additional dimensions are provided for you to configure with customer attributes.
- Inclusion Coverage

  This identifies a list of accounts, contacts, households, or partners to be included.
- Exclusion Coverage

  This identifies a list of accounts, contacts, households, or partners to be excluded.

You can define territories using a combination of different coverage definitions, thus giving your organization the power to model complex territories. Here are some examples:

- Steve is a key account director who covers three enterprise accounts, namely ACME Inc, Vision Corporation, and Pinnacle Technologies.

  You define Steve's territory with inclusion coverage of three accounts: ACME Inc, Vision Corporation, and Pinnacle Technologies.
- Amanda is a territory field salesperson who covers all the high tech accounts in Northern California. In addition, ABC Technologies, located in southern California, was also assigned to Amanda because she has a prior relationship with the CFO.

  You define Amanda's territory using a dimensional coverage with two dimensions `(Address = Northern California, Industry = High Tech)` and an inclusion coverage with one account, ABC Technologies.

Territory Assignment Execution

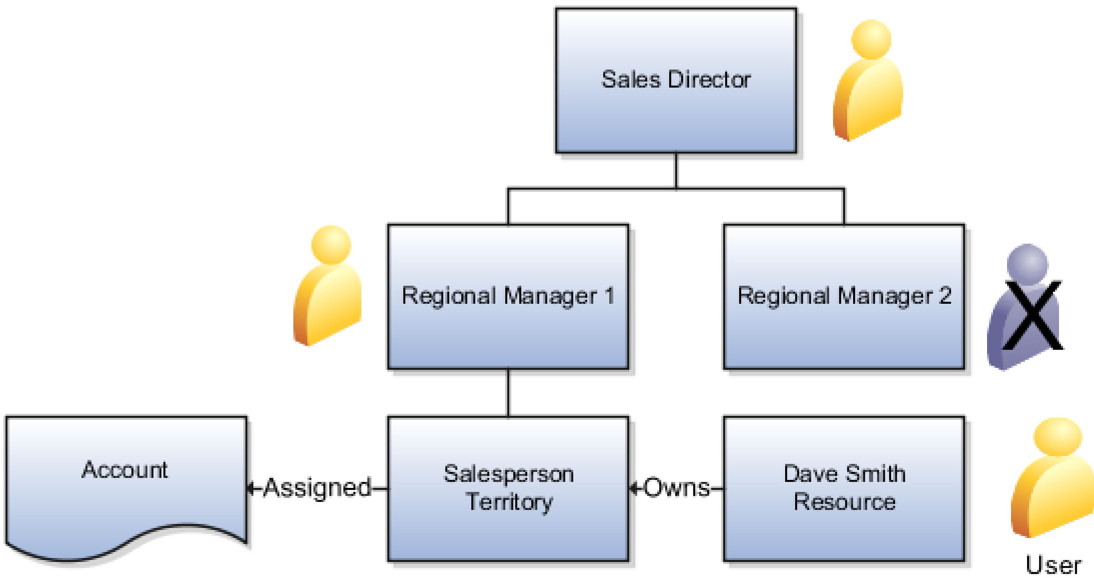
You can configure when territories are assigned to transactional objects and the frequency the assignment process should be executed. Territories can be assigned in real time as new transactions are created or when existing transactions are updated. You can also configure territory assignment to be run as a background process to assign transactions in batch. This is the recommended approach if you have a large volume of transactions.

During assignment execution, transactional attribute values are matched against territory coverage and all matching territories are assigned to the object. As an example, on a given opportunity, you can assign multiple territories composed of the sales team: the account representative, the industry overlay, a product specialist, the channel partner, and the channel account manager. This enables you to assemble the most effective sales team for each opportunity and to maximize your chances for closing the deal.

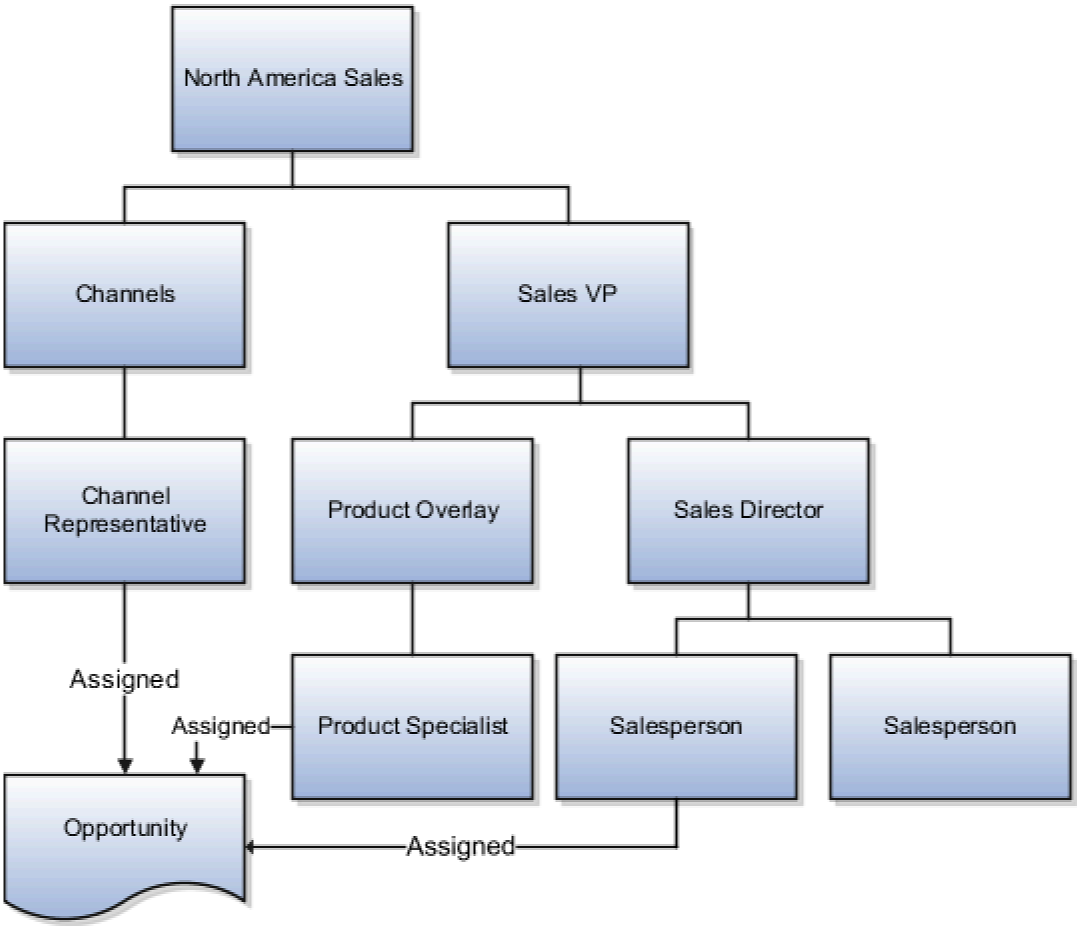
Territory-Driven Visibility

After territories are assigned to transactional objects, territory team members gain visibility into these objects through the territory hierarchy.

In this figure, a salesperson Dave Smith has access to the account because his territory is directly assigned to the account record. His regional manager and sales director also gain access to the same account because their territories are ancestors of Dave's territory. By contrast, Regional Manager 2 doesn't have access to the account because her territory isn't a direct ancestor of Dave's territory.



Combining flexible assignment rules and territory-driven visibility, you gain precise control over data visibility and data sharing policies. For large enterprise sales organizations with complex sales teams such as the following example, shared visibility on customer and opportunity data can further facilitate collaboration and team cross-selling. This figure shows the North America Sales team that includes channels and a sales VP. The sales VP has a Sales Director managing salespeople, and a Product Overlay group with a product specialist. The Channels division includes channel representatives. An opportunity is assigned to a channel representative, a product specialist, and a salesperson.



Territory Administration

For many sales organizations, territory administration is a task that's performed on a daily basis to account for attrition or turnover of the sales force.

In addition, major territory realignment resulting from sales reorganization or mergers and acquisitions can often take weeks, if not months, to implement. Using an intuitive user interface and bulk update capabilities, you can quickly and efficiently manage territory changes on an ongoing basis. This significantly reduces operational costs and increases business agility.

Delegated Administration

For large enterprise companies, the responsibility of territory administration is commonly decentralized by lines of business, divisions, or regions. This can be easily accomplished by adding the regional administrator to the territory team of the top-level territory corresponding to the scope of delegation. For example, if you add an administrator to the territory team of the top-level territory for North America Sales, then she can administer all the descendant territories under North America Sales. However, this administrator has no access to other territories, such as those in the European region.

Sales Features Supported by Territories

You use territories to support other areas in sales.

- Forecasting

  Sales Forecasting in Redwood UX makes it possible to forecast on territories assigned to product items in opportunities. The forecast is rolled up the management chain using the territory hierarchy.
- Intelligent Product Picker

  The product list in opportunities or leads automatically applies filters to only show those products that are defined in the coverage of the salesperson's territory.
- Business Intelligence

  Use the territory hierarchy and territory team in reporting and analytics. The territory hierarchy can be a dimension to aggregate data in building reports and key performance indicators.

Territory Implementation

Steps to Implement Territories

When you set up territories, these are the overall steps you follow.:

1. Plan how you want to define the boundaries of your territories. Which dimensions do you need to define the coverage?
2. Prepare the data you need to define your territory coverage. If you plan to assign accounts directly to each territory, then you need customer data. A dimension requires data (for example, geography) before you enable it.
3. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Territories
4. Use the Define Default Proposal Owner task to set this profile option.
5. Start the Enable Dimensions and Metrics task.
6. Click **Edit** to make changes to existing settings.
7. In the Dimensions region, click **Select and Add** to add and enable dimensions.
8. In the Additional Options region, you can choose to enable Territory Precedence.

   Included accounts have priority over dimension coverage when assigning accounts to territories with the same function name. If you don't assign functions to territories, then included accounts have priority over all other territories. Enabling this option disables metrics, assignment preview, and territory validations.
9. Enable metrics that you want to see when comparing territory proposals.
10. Run Load and Activate to activate all of your settings and perform any data loading required according to your choices.

11. If you enable Territory Precedence and you want to assign function names to territories, then enter values for the Territory Function ORA_MOT_TERRITORY_FUNCTION lookup type.
12. Use the Run Territory Proposal Activation task to schedule background processes.
13. Create your hierarchy of territories.

Set the Territory Proposal Profile Option

The application generates territory proposals, for example when processing territory inheritance. Every proposal must have an owner. You must provide an owner for generated territory proposals.

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task:
    - Offering: Sales
    - Functional Area: Sales Foundation
2. Search for the profile option MOT_DEFAULT_RESOURCE, Proposal Owner Default.
3. Select a resource to be the default owner.
4. Save and close.

Schedule Territory Processes

You can make changes to many territories at one time using a territory proposal. If you schedule proposals to become active on certain dates, then you must schedule a background process to run periodically to perform the activation.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Territories
    - Task: Run Territory Proposal Activation
2. To run the process immediately, click **Submit**.
3. Schedule the Run Territory Proposal Activation process. Click **Advanced.**
4. Select **Run Using a Schedule**.
5. For Frequency, select **Daily**.
6. Select start and end dates and times.
7. Go to the Notification tab.
8. Click **Create Notification**.
9. Enter the email for the person who should receive notifications.
10. In the **Condition** field, you should select **On Warning** and **On Error** as a minimum.
11. Click **Submit**.

Expose the Exclusions Tab and the Enable Forecasting Field

You can modify the Territory Details UI to add the Exclusions tab and to add the Enable Forecasting field to the Summary tab. These changes affect the Less Details UI where sales managers can modify active territories without using a territory proposal.

To add the Exclusions tab to the Territory Details page:

1. Ensure you're working in an active sandbox.
2. From the Navigator, open Application Composer.
3. Select the CRM Cloud application.
4. In Standard Objects, expand Sales Territory.
5. Select **Pages**.
6. In the Application Pages tab, Details Page Layouts region, select **Standard Layout**.
7. Click **Duplicate**.
8. Accept the provided name **Default custom layout**.
9. Save and close.
10. Click the link to open your new layout.
11. In the Subtabs region, click the **Hide, Show, or Reorder Subtabs** icon.
12. In the Configure Subtabs dialog, move **Exclusions** from the Available Subtabs list to the Selected Subtabs list.
13. Click **OK**.
14. Click **Done**.

To enable the Enable Forecasting field:

1. Ensure you're working in an active sandbox.
2. Open your Default custom layout for the Details Layout.
3. Click the Summary tab.
4. Click the **Edit** icon beside the Summary heading.
5. Move the **Enable Forecasting** field from the Available Fields list to the Selected Fields list.
6. Save and close.

After you complete these procedures, test the changes and publish the sandbox according to your company's business practices.

Define the Territories UI

You can determine which UI you see when you first open Territories.

Define the Landing Page

You set profile options to define whether the landing page for territories is the More Details UI or the Less Details UI.

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task:
   - Offering: Sales
   - Functional Area: Sales Foundation
2. Search for the profile option code **FND_CLASSIC_INTERFACE**. This profile option enables access from the Navigator and springboard to the more details pages when there are more and less detail versions of the same page. If not set, the default is the less details version.
3. You can set this profile option at the site level or for individual users. Choose one of the following settings:
   - Yes: The landing page is the more details UI.
   - No: The landing page is the less details UI.
4. Search for the profile option code **MOT_DEFAULT_CLASSIC_INTERFACE**. This profile option is also accessed through the Manage Administrator Profile Values task.

5. Enter one of the following settings for this site-level profile option:
    - Y: The territories landing page is the More Details UI and users can't access the Less Details UI used to directly change active territories.
    - N: The territories landing page is the Less Details UI and users can make changes directly to active territories. Users can also navigate back and forth between the More Details and the Fewer Details UIs.

Change the Default for the Include Customer Hierarchy Option in Inclusions and Exclusions

You can define a territory coverage by selecting individual customer accounts to be included whether or not they match other coverage criteria.

You can also select customers as exclusions for the territory. They're excluded even though they meet other coverage criteria. Your selected customer includes all accounts in that customer's hierarchy. You can deselect the Include Hierarchy check box to not include the hierarchy for that customer. Change the ORA_MOT_INCLUDE_CUST_HIERARCHY setting to No and the Include Hierarchy check box defaults to deselected.

To change the profile option:

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task:
    - Offering: Sales
    - Functional Area: Sales Foundation
2. Search for the Include Customer Hierarchy (ORA_MOT_INCLUDE_CUST_HIERARCHY) profile option.
3. Change the site-level profile option to No to show the Include Hierarchy option deselected when you add a customer inclusion or exclusion. The default value is Yes, which selected the Include Hierarchy option when you add an inclusion or exclusion.

Copy Extensible Fields from Parent Profile Option

Fields, including extensible fields for the Sales Territory Resource and Sales Territory objects, are copied to the child territory from the parent when you create it.

If you don't want the extensible fields to be copied from parent to child, change the profile option ORA_MOT_COPY_EXT_FIELDS_FROM_PARENT, Copy Extensible Fields from Parent, from Yes to No.

Enable Prospects for Inclusion in Sales Territories

By default, you can only include accounts of type customer in sales territories. You can enable the inclusion of accounts of type prospect, by setting the profile option Account Types Enabled for Assignment (ZCA_ASSIGNMENT_ACCT_TYPE_ENABLED).

1. In Setup and Maintenance, go to the Manage Administrator Profile Values task:
    - Offering: Sales
    - Functional Area: Sales Foundation

2. Search for the profile option ZCA_ASSIGNMENT_ACCT_TYPE_ENABLED, Account Types Enabled for Assignment
3. Change the profile value to `ZCA_CUSTOMER,ZCA_PROSPECT`. Make sure you leave no space between the two entries.

> **Note:** There's a slight functionality difference between the two tabs in the Territories Work area for prospect accounts. On the Territories tab, you can add any prospect account. In the Sales Territories Hierarchy tab, the prospect accounts must also be part of an account hierarchy underneath an account of type customer.

Related Topics

- Sales Territory UIs for Different Uses

Address Dimension

Address Dimension

Use the Address dimension to set up sales territories by a combination of address elements, such as state, city, and postal code.

The application uses pattern matching for assignment, so you must include all variations of spellings that exist in your data in the territory definition. The cleaner and the more consistent your data, the less work you have to do.

When you define each territory, you can enter multiple rows of address elements:

- All the entries in a row must match for assignment (AND operator)
- If you enter multiple rows, one of the rows must match for assignment (OR operator)

Here's how the entries are matched:

- For all of the address attributes except Postal Code, the application uses exact matches. When you define the coverage for a territory, you must include all the possible spellings that exist in your address data. The match must be exact, but matches aren't case-sensitive, so you don't have to include `TX` and `Tx` as separate spellings, for example.

  If you're creating a territory for the state of Texas, you might need to include these different spellings, depending on what's in your data: `TX`, `Tex`, `Tex.`, and `Texas`.

  You enter these spelling variations as four separate lines in the Texas state territory definition. The country is always required.

Country	State
United States	TX
United States	Tex
United States	Tex.

Country	State
United States	Texas

Here's how you could define a territory for the city of Dallas, Texas:

- You need both state and city to match.
- Dallas must be spelled correctly in your data every time.

Country	State	City
United States	TX	Dallas
United States	Tex	Dallas
United States	Tex.	Dallas
United States	Texas	Dallas

- To match by postal codes, such as US ZIP Codes, you can enter ranges of values or partial values. Here are the rules:
  - You can enter ranges of values and the ranges don't have to be valid postal codes. For example: `94501-94599`.
  - Use the percent sign (%) at the end of an entry to indicate partial matches. For example, you can enter `940%` to indicate all the postal codes starting with 940.
  - You can't use the percent sign for ranges.
  - You can use US ZIP+4 postal codes in ranges, provided you enclose them in double quotation marks, for example: `"94065-0000"-"94070-9999"`.

If there's a chance that some of your Dallas addresses don't include the city, then you could add a line to your Dallas territory definition to enable assignment by postal code:

Country	State	City	Postal Code
United States	Any	Any	75001 - "75222-9999"

Country	State	City	Postal Code

Here's an explanation:

- The country is required, but the values for state and city are Any because you're matching only the postal code. There's an implicit AND operation in each row, so if the postal code doesn't match, the account won't get assigned to the territory even if you specified the city.
- The upper limit of the postal code range is "75222-9999" to include addresses with ZIP+4 postal codes. Entering 75222 as the upper limit wouldn't assign addresses with 75222-0002. The double quotation marks are required because you're entering a code with a hyphen. The entry for the upper limit isn't a real postal code, but that's OK for the pattern matching.

Here are a few more examples of postal code territories:

Country	State	Postal Code	Explanation
United States	Any	940%	Territory for all the postal codes starting with 940%, which include most of the San Francisco peninsula.
United States	Any	94065 - 94070	Territory for Redwood City and San Carlos, California. The rule doesn't assign accounts with 94070 ZIP+4 codes in the address because these are higher numerically than 94070. For example, this rule won't assign a San Carlos account at an address with the postal code 94070-0121.
United States	Any	94065 - "94070-9999"	Territory for Redwood City and San Carlos, California. This version correctly assigns accounts with 94070 ZIP+4 code, including 94070-0121.

Postal Code Assignment Example

Here's an example of how accounts are assigned using postal codes. Suppose you set up the following three territories:

Territory Name	Country	State	City	Postal Code
San Francisco	United States	Any	Any	941%
Western Arizona	United States	Any	Any	853%
Phoenix, Arizona	United States	Any	Any	85000-85299

When you run assignment on the following accounts:

Account Name	Address
Blue Semiconductor	100 Main Street, Phoenix, AZ 85254
Fantastic Laptops	500 East Main Street, Scottsdale, AZ 85338
First Software	2361 21st Avenue, San Francisco, CA
Compucon	500 Spear Street, San Francisco CA 94105-1548

You get these territory assignments:

Account Name	Assigned Territory
Blue Semiconductor	Phoenix, Arizona
Fantastic Laptops	Western Arizona
First Software	Not assigned to any of the territories because the postal code is missing.
Compucon	San Francisco

Available Address Elements

When you enable the Address dimension, you can enable any of the following address elements. You can use the additional attributes to accommodate the address elements that are required for some countries.

- Country
- State
- Province
- County
- City

- Postal Code
- Additional Attribute 1
- Additional Attribute 2
- Additional Attribute 3
- Additional Attribute 4
- Additional Attribute 5

Enable the Address Dimension

Use the Address dimension to set up sales territories by a combination of address elements, such as state, city, and postal code. The application matches your entries using a simple string comparison. You enable the Address dimension by selecting address attributes.

You can't enable both Geography and Address dimensions.

1. In the Setup and Maintenance work area, use the following:
   - Offering: Sales
   - Functional Area: Territories
   - Task: Enable Dimensions and Metrics
2. Click **Edit**.
3. In the Dimensions region, click **Select and Add**.
4. Select the Address dimension and click **OK**.
5. In the Address Attributes region, select to make attributes available for defining territory coverage. Country is required and is selected for you. Postal Code and City are the two that are most often used.
6. From the Actions menu at the page level, select **Load and Activate**.

When you define a territory, you see your selected address attributes in the Address Coverage region of the Dimensions tab. Enter your address definition in the correct column. For Canada, `E%` is an example for all postal codes that start with E. You can enter a range of postal codes, a single postal code, or partial postal codes followed by percent like the `E%` example. Only postal codes accept a range, like `10001-"20005-9999"`, or accept the percent sign.

Territory Dimensions

How to Set Up Territory Dimensions

Dimensions are attributes that define jurisdictional boundaries of territories. For example, you can use the address dimension to define territories by country or postal code.

Every customer that falls within the defined geography is assigned to the territory and to the resources for that territory. You assign customers, partners, leads, and opportunity items to the correct territories using dimensions. All dimension values combine to define the territory boundaries. For example, if Address is set to United States and Customer Size is set to Large, then the territory is assigned to only large customers within the United States.

Customer and Partner Inclusions

By default, you can define territories by selecting customers or partners to be included in the territory. Customers and partners are available to select from Customer Data Management for inclusions and exclusions. When a merge action eliminates duplicate records, one record can be replaced by another. If a customer included in or excluded from a territory is changed through the merge process, then the new customer record automatically replaces the old record in the territory.

Dimensions

You must enable dimensions before you can use them to define territories. The dimensions available to assign customers or partners to a territory are:

- Address
- Account Type

  The account type specifies if a customer is a named account or not.
- Customer Size
- Industry
- Organization Type
- Additional dimensions based on selected classification categories to match specific customer or partner information

A territory assigned to a customer or partner is also assigned to the corresponding leads and opportunity items. These dimensions define boundaries specifically for leads and opportunity items:

- Business Unit
- Product

  Product groups and products form a hierarchy in the sales catalog.
- Sales Channel

  The available sales channels are Direct, Indirect, and Partner.

You must enable each dimension that the sales organization plans to use for automatically assigning territories to customers, partners, leads, or opportunity items. All dimensions except account type require some preparation before you enable and use them.

Dimensions You Can Modify

You can modify these dimensions or use them as provided:

- Customer Size

  You can change the provided customer sizes within the **Organization Size** lookup type.
- Industry

  The industry hierarchy is from the customer classification module. When you enable the Industry dimension in Enable Dimensions and Metrics, you must also select the classification category that you want to use. The available selections include only classification categories belonging to the Industrial Categories grouping. Your selection modifies the profile option Industry Classification Category.

You can assign primary and nonprimary industry values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values. For more information about assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (document ID 2086014.1) available on My Oracle Support.

- Organization Type

  To change the available organization types, edit the Organization Type category using the Manage Classification Categories task in the Setup and Maintenance work area, Sales offering, Territories functional area. You can assign primary and nonprimary organization type values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values. For more information about assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (document ID 2086014.1) available on My Oracle Support.

- Sales Channel

  You can add additional channels under the Partner sales channel.

Dimensions Requiring Preparation

See related topics to find out how to prepare the following dimensions:

- Business Unit
- Address
- Product
- Auxiliary Dimensions

Related Topics

- Prepare the Product Dimension
- Define Auxiliary Dimensions

Synchronize Territory Dimension Members

When you define territories, you can select dimension members provided by source data that can change, such as lookup codes or classification values. You must reload the data to keep it current.

These dimensions can become out of date due to source data changes:

- Industry
- Customer Size
- Organization Type
- Product
- Sales Channel
- Business Unit

- Auxiliary 1, 2, or 3

If, for example, you know there are changes in the classification category used for the Organization Type dimension, you must load them and activate them.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Territories
    - Task: Enable Dimensions and Metrics
2. Go to **Actions** > **Load and Activate**.

An alternative is to use the Territories functional area task **Run Territory Dimension Synchronization** to load and activate changes in dimension members.

Prepare the Product Dimension

The Product dimension captures leads and opportunity line items to assign them to territories. You create a hierarchy of products and product groups in the sales catalog before enabling the Product dimension.

Salespeople can select the products or product groups when creating leads or opportunities. When you include a product group in a territory coverage, the territory then captures leads and opportunity line items containing a product within the hierarchy of the selected product group.

> **Tip:** A good practice is to initially set up your sales catalog using product groups, and then add individual products or inventory items if needed.

1. Create your hierarchy of product groups and products, following the instructions in the Sales Catalogs chapter.
2. Publish your sales catalog.
3. Use the **Manage Product Group Usage** task in the Sales Catalog and Products functional area to add your root product group as the **Base** usage.
4. Go to the **Enable Dimensions and Metrics** task in the Territories functional area.
5. Add **Product** to the enabled dimensions.
6. Click **Load and Activate** to start the background process. The process loads the sales catalog data to become dimension members available for selection when defining territories. The process also loads dimension member data for other enabled dimensions.
7. When changes occur in the sales catalog, you must again run the Load and Activate process to update the Product territory dimension member data. You can perform the maintenance task **Run Territory Dimension Synchronization** to schedule the Load and Activate process.
8. A good practice is to run full reassignment processes for leads and opportunities after updating Product dimension members in the previous step.

Related Topics

- Sales Catalog High-Level Setup Steps

Dimension Parameters

Use parameters to refine the definition of each dimension so it best fits business requirements.

Three dimensions use parameters:

- Industry
- Time
- Product

Industry

Use the parameter to set the number of levels in the industry hierarchy that display in the dimension member selection screen.

Time

Set the start of the time period used in calculating metrics using the Calendar Start parameter. Set the number of years prior to today's date when the calendar starts for metrics.

Product

Use the parameter to set the number of levels in the product hierarchy that display in the dimension member selection screen.

How do I create custom dimensions?

You can define up to 10 custom dimensions that will match with customer attributes. The custom dimensions can be used with account, opportunity, lead, deal, or partner objects.

The custom dimensions can be used with account, opportunity, lead, deal, or partner objects.

A limited set of sales account fields are available to use with custom dimensions. For opportunities, leads, deals, or partners, you can use any standard or custom field, for example a custom field Branch or Sales Market. You can manage custom dimensions in active territories, territory proposals, REST services, and using import and export management.

1. Define a standard lookup to become the source for dimension members for the custom dimension.
2. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Territories
    - Task: Enable Dimensions and Metrics
3. Add a custom dimension and rename the dimension to reflect the business purpose for this dimension.
4. Select the correct lookup type that you created.
5. Load and activate your enabled dimensions.

What to do next

Add a field for assignment and map your new custom dimension for territory assignment to accounts, partners, revenue lines, leads, or deals.

Related Topics

- Custom Dimensions for Revenue Assignment Example
- Custom Dimensions for Lead Assignment Example

Add an Attribute for Revenue Assignment

Add one or more lookup fields for territory assignment to revenue lines.

You can add one or more of the following for territory assignment to revenue lines:

- A standard opportunity or revenue lookup field
- A custom opportunity or revenue lookup field

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Assignment Manager Objects
2. Select **Revenue**.
3. On the Attributes tab, click **Add Row**.
4. Select the lookup field you want to use, such as Line of Business or Revenue Type Category.
5. Save and publish.

What to do next

Add an assignment mapping to use this attribute as a custom dimension.

Add a Revenue Assignment Mapping

Map your new custom dimension for territory assignment to revenue lines.

Before you start

You created a lookup that provides values for the custom dimension. You added the lookup field as an attribute for revenue assignment.

Here's what to do

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Assignment Manager Objects
2. Select **Revenue**.
3. In the Candidates tab, select **Territory**.
4. In the Revenue Territory: Revenue Sets tab, select the **Sales Account** mapping set.
5. In the Mappings table, click **Create**.
6. Select or enter values for these fields:

Type	Attribute
Exact Match	Select

Function Code	Enter the appropriate dimension code, such as Ext1
Candidate Object	Territory
Work Object	Revenue
Candidate Object Attribute: Low	Dimension Member ID
Work Object Attribute: Low	Select the appropriate field, such as Line of Business

7. Click **OK**.
8. Save and publish.

Add an Attribute for Lead Assignment

Add one or more lead lookup fields or custom child object fields for territory assignment to leads.

You can add one or more of the following for territory assignment to leads:

- A standard lead lookup field
- A custom lead lookup field
- A lead custom child object field

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Assignment Objects
2. Select **Sales Lead**.
3. On the Attributes tab, click **Add Row**.
4. Select the standard or custom lookup field you want to use, such as Branch or Sales Market.
5. Save and publish.

What to do next

Add an assignment mapping to use this attribute as a custom dimension.

Add a Lead Assignment Mapping

Map your new custom dimension for territory assignment to leads.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Leads Assignment Objects
2. Select **Sales Leads**.
3. In the Candidates tab, select **Sales Lead Territory**.

4. In the Sales Lead Territory: Mapping Sets tab, select **Mapping Set 1**.
5. In the Mappings table, click **Create**.
6. Select or enter values for these fields:

Type	Attribute
Exact Match	Select
Function Code	Enter the appropriate dimension code, such as Ext1
Candidate Object	Territory
Work Object	Sales Lead
Candidate Object Attribute: Low	Dimension Member ID
Work Object Attribute: Low	Select the appropriate field, such as Branch or Sales Market

7. Click **OK**.
8. Repeat steps 5-7 for each mapping set.
9. Save and publish.

Custom Dimensions for Revenue Assignment Example

This example models sales organizations where salespeople are responsible for either new sales or renewal and expansion sales.

The use case is to define territories with the custom dimension Revenue Type Category in addition to account, product, and sales channel dimensions.

1. Use the Manage Standard Lookups task to create the lookup type ORA_MOO_REVN_CATEGORY_TYPE with the lookup codes New, Renew, and Expansion.
2. Use Application Composer to add the Revenue Type Category field to Revenue Table columns in the Opportunity Details page.
3. In Setup and Maintenance, open the Enable Dimensions and Metrics task. Select the Edit action, and add the Extension 2 dimension.
4. For the dimension source find and select the lookup type ORA_MOO_REVN_CATEGORY_TYPE.
5. Save and close.
6. Perform the Load and Activate action. Use the Refresh Status action to monitor processing and completion of the processes.
7. In Setup and Maintenance, use the Manage Sales Assignment Manager Objects task and add a mapping for the Revenue object.
8. In the Attributes tab add the Revenue Type Category attribute.
9. In the Candidates tab select Territory and the Territory: Mapping Sets tab.
10. Select the Sales Account mapping set.
11. Click Add and enter these values:

Type	Attribute
Exact Match	Select

Function Code	Ext2
Candidate Object	Territory
Work Object	Revenue
Candidate Object Attribute: Low	Dimension Member ID
Work Object Attribute: Null Value Handling	Derive mapping value
Work Object Attribute: Low	Revenue Type Category

12. Save and publish.

Results:

Now you can define territories with a Revenue Type Category coverage, and use this information when assigning territories to revenue lines.

Custom Dimensions for Lead Assignment Example

This example sets up the Branch custom dimension for lead assignment.

The use case is to define territories with the Branch custom dimension in addition to the account and product dimensions.

1. In Application Composer, create a fixed choice list called Branch for the Lead standard object..
2. In the List of Values region, create a new lookup type MKT_LEAD_BRANCH called Branch, and add lookup codes for each of the company branches.
3. Add the Branch field to the Lead Detail page and publish.
4. In Setup and Maintenance, open the Enable Dimensions and Metrics task, select the Edit action, and the Extension 3 dimension.
5. For the dimension source find and select the lookup type MKT_LEAD_BRANCH. Save and close.
6. Perform the Load and Activate action. Use the Refresh Status action to monitor processing and completion of the processes.
7. In Setup and Maintenance, use the Manage Sales Assignment Manager Objects task and add a mapping for the Sales Lead object.
8. In the Attributes tab add the Branch attribute.
9. In the Candidates tab select Territory and the Sales Lead Territory: Mapping Sets tab.
10. Select Mapping Set 1.
11. Click Add and enter these values:

Type	Attribute
Exact Match	Select
Function Code	Ext3
Candidate Object	Sales Lead Territory
Work Object	Sales Lead
Candidate Object Attribute: Low	Dimension Member ID

Work Object Attribute: Null Value Handling	Derive mapping value
Work Object Attribute: Low	Branch

12. Save and publish.

Results:

Now you can define territories with a Branch coverage, and use this information when assigning territories to leads.

Define Auxiliary Dimensions

You can define up to three auxiliary dimensions that will match with customer attributes.

Watch video

Defining Auxiliary Dimension 1, 2, or 3

You can define up to three customer auxiliary dimensions based on the customer classification model. Define classification categories first and associate them to the Customer Categories grouping.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Territories
   - Task: Manage Classification Categories
2. Create a new classification category. You can allow parent code assignment. If you allow multiple class code assignments, then the classification that's designated as Primary in the customer record is the one that's matched to assign the customer to a territory.
3. Add classification codes for the new category. You can form a hierarchy with the codes or not.
4. Use the **Manage Classification Groups** task and search for the CUSTOMER_GROUP category group code. Edit the group and add your new classification category to the group.
5. Add an auxiliary customer dimension in **Enable Dimensions and Metrics** and select the correct classification category that you created. Then this classification category becomes the source for dimension members for the auxiliary dimension.
6. Load and activate your newly enabled dimensions.

Setting Assignment Mapping

Map your new dimension for territory assignment to accounts.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Accounts and Contacts
   - Task: Manage Customer Center Assignment Objects
2. Select **Account**.
3. Click the **Candidates** tab.
4. Select **Account Territory**.
5. Click the **Account Territory: Mapping Sets** tab.

6. Select **Mapping Set 1**.
7. Find the auxiliary dimension you want to use, such as **Auxiliary Dimension 1**.
8. Click **Edit**.
9. Deselect **Inactive**.
10. Click **OK**.
11. Click **Save and Publish**.

Territory Hierarchy

Work with Active Territories in Workspace

Use Workspace to create and make changes to your active territory hierarchy. If you prefer to use proposals to change multiple territories, go to the Sales Territories Hierarchy tab.

Search and filter your list to begin working. When you open and edit a territory from your list, the Next button opens the next territory to edit. If enabled and you have the correct privileges, you can work in nested tabs to navigate across and between territory records without losing context. Use dynamic tabs and nested tabs to resolve territory gaps and overlaps. Manage customer-centric territories in Workspace. Use other methods for partner-centric, resource-centric, and inheritance recipient territories.

You can search by territory details and coverage attributes. Here are some coverage search tips.

- The industry, organization type, product group, and auxiliary 1-3 dimensions are hierarchical. A search for descendant member values finds only territories defined explicitly with the descendant value. For example, to search for territories which cover the product group Laptop X, but not its parent Hardware, Laptop X must be present in the territory coverage.
- To search for territories using customer inclusions or exclusions, use the Coverage: Account: Name filter.
- Accounts are hierarchical. To search for territories based on a descendant account, the account must be explicitly selected in the territory coverage. For example, to search for territories which include Account ABC USA, this account, and not the parent ABC Global must be present in the territory coverage.
- Accounts are hierarchical. To search for territories based on a descendant account, the account must be explicitly selected in the territory coverage. For example, to search for territories which include Account "ABC USA", this account, and not the parent "ABC Global" must be present in the territory coverage.
- When you use dimension filters to search, you can use only one dimension filter. Here are some exceptions:
  - You can use the coverage type filter together with a dimension filter.
  - Multiple address dimension filters can be used together. For example: Coverage: Country and Coverage: Postal Code
  - The Coverage: Sales Channel and coverage: Sales Subchannel filters can be used together.
- For most dimension filters the search finds all territories with a regular dimension coverage or an inclusion or exclusion coverage matching the value.
- You can't search using these coverage fields:
  - Include Hierarchy: This indicates that the account plus its hierarchy is included or excluded from the territory coverage.
  - Coverage: Partner: This field represents the partner accounts that are included or excluded in the territory coverage.

Related Topics

- Get Started with Search in Workspace and Work Areas
- Adaptive Search Configuration Provided by Oracle
- How do I use dynamic and nested dynamic tabs?
- How can I enable territory dynamic tabs and nested dynamic tabs in Workspace?
- How do I switch to Work Areas powered by Adaptive Search
- Enable Business Objects for Adaptive Search

Territory Proposals

Use territories to assign teams to leads, opportunity items, and customers. You model and explore territory definitions with a territory proposal without affecting active territories. Activate a proposal to update the existing territory definitions.

Typical Territory Proposal Workflow

This table shows a typical workflow for territory proposals.

Task	Description
Create a proposal	Create the proposal and set an activation date.
Add a territory to the proposal	Add an existing territory to the proposal, or create a new territory. Repeat for additional territories.
Define coverage	Select attributes to define the boundaries of each territory.
Select the territory team	Every territory must have an owner and can have additional team members.
Analyze and compare proposals	Review metrics and graphs to analyze proposals for such things as number of customers and amount of closed opportunity revenue in each territory.
Activate the proposal	Activate a proposal. The proposal remains in pending activation status until the activation date is reached. You can reopen and update the proposal until then.
Run reassignment processes	Reassignment processes are scheduled to run periodically.

Related Topics

- Territory Coverage
- Territory Proposal Statuses
- Territory Proposal Rules

Create the Territory Hierarchy Using Proposals

You create one territory hierarchy starting with a single top territory. Create more than one what-if proposal to compare and decide which is the most equitable.

Create a Proposal

Use the territory proposal to create many territories at one time.

1. In Workspace, click the **Sales Territories Hierarchy** tab.
2. Click the **Manage Proposals** button on the Active Territories page.
3. In the Current Territory Proposals region, click **Create** (the plus sign icon).
4. Enter a name for the proposal.
5. Leave the **Activation Date** field blank. This will cause the proposal to be activated immediately after you build your territories.
6. Click **Save and View**.

Your territory proposal opens and you can start building your territory hierarchy.

Create the Master Catchall as the Top of the Hierarchy

Use this procedure to create the territory at the top of the sales territory hierarchy as the master catchall territory. Because the top territory is usually owned by a senior manager or executive and you don't want executives troubleshooting territory assignment, you must add a sales administrator, or another resource who does the troubleshooting, as a territory team member.

1. In the Territories region of your territory proposal, click **Create**.
2. Enter the territory name.
3. Enter the resource who's the owner of the top territory"
    a. From the **Owner** list, select **Search**.
    b. Search for the resource name using any of the criteria.
    c. Select the name and click **OK**.

    The owner appears on the Territory Team tab. You can add additional members to the team, and the owner himself can add members later.
4. From the territory **Type** list, select **Prime**.
5. From the **Enable Forecasting** list, select **Prime only** unless you're creating forecasts for overlay territories. This setting enables the territory to be used for forecasting.
6. Add the sales administrator to this territory:
    a. In the Territory Team tab in the Additional Information region, click **Select and Add**.
    b. Search for the resource using any of the fields.
    c. Select the resource from the search results and click **OK**.
7. Click **Save and Close**.

    Your new territory appears in the Territories table of your proposal.
8. With the territory selected in the Territories table, click the Coverage tab in the Details region at the bottom of the page.

Every enabled dimension is represented by a column, and each column displays the value of **Any**. This is the setting you want for your master catchall territory. You're now ready to add the rest of the territory hierarchy.

Add the Rest of the Hierarchy

Add the rest of the sales territory hierarchy from the top down.

1. In the Manage Territory Proposals page, select the name of your proposal to open it for editing.
2. Select the parent territory in the Territories table.
3. Click **Create Child of Selected Territory** (the plus sign icon).
4. In the Create Territory page, enter the territory name.
5. Enter the owner for the territory.
6. Your new territory duplicates the definition from the parent. You can make changes.
    a. Select the territory type, either **Prime** or **Overlay**.
    b. If Territory Precedence is enabled, you can select a territory function. Assignment compares all territories with the same function and gives precedence to the territories with included accounts.
    c. From the **Enable Forecasting** list, select **Prime**, **Overlay**, or **Prime and Overlay**, depending on the territory you're setting up. For managers of both prime and overlay territories, select **Prime and Overlay** so that the managers can adjust forecasts of all their subordinates. Select **Overlay only** to remove the territory from revenue forecasting.
7. Click **Save and Close.**

    You're returned to the Territory Proposal window. You're now ready to specify the coverage for the territory.

You can copy an existing territory to create a territory at the same level in the hierarchy. No child territories are copied..

1. Select the territory you want to copy.
2. Click **Copy territory as a peer with no children.**
3. Enter a name for the new territory.
4. The territory definition is copied from the parent territory of the selected territory. This includes the summary and additional information, including owner. territory type, and the team. Make changes as needed.
5. Save and close.
6. Review the coverage for your new territory. The dimensions, inclusions, and exclusions match the parent territory. To make changes, follow the steps in the next section.

Define the Territory Coverage

When you create a child territory, it automatically inherits the coverage of its parent, including dimensions, inclusions, and exclusions. You can use a territory that has no coverage definitions as a parent to create a new territory with a clean slate.

1. In the Manage Territory Proposals page, select the name of your proposal.
2. In the Territories table, select the territory you want to change.
3. Click the **Coverage** tab in the **Details** region of the page. Coverage can include Address, Dimensions, Included Customers, and Excluded Customers.
4. If a region has no coverage, then click **Add** in the Actions menu. Otherwise, click **Edit** (the pencil icon) to make changes.
5. For dimensions, either Add or Edit opens Edit Coverage:
    a. Select the dimension from the **Dimensions** list.
    b. Add or remove dimension members from the Selected Dimension Members box.

> **Tip:** If the Product dimension doesn't show the correct list of products from the sales catalog, then navigate to the Scheduled Processes work area and run the Refresh Denormalized Product Catalog Table for BI process. The wrong products can show up in rare cases where you have changed the root of your sales catalog.

c. Save and close.

6. To include specified customers:

   a. Click **Select and Add**.
   b. Search for and select a customer.
   c. You can click **Save and Apply** to search for and select another.
   d. Click **Save and Close**.
7. To exclude specified customers, repeat step 7 in the Excluded Customers region.

Activate a Territory Proposal

When you finish making changes to your territories, use this procedure to activate your territory proposal and start using the new territories for assignment.

1. Click **Navigator** > **Territories**.
2. Select the **Sales Territories Hierarchy** tab.
3. In the Active Territories page, click the **Manage Proposals** button.
4. If the proposal you want to activate doesn't appear in the Current Territory Proposals table, select **All Proposals** from the **Proposals** list.
5. Select the proposal and click **Activate**.

   You can see the activation process status in the Details region of your proposal.
6. Click **Done** to return to Manage Proposals.
7. Click **Done** to return to the Overview page. Your territory changes now appear in the list of active territories.

Create the Territory Hierarchy One Territory at a Time

You can build your active territory hierarchy starting by creating the one top territory. You then add one child territory at a time to a parent territory. When you save a new territory, it immediately becomes active.

To create the top territory:

1. Navigate to Territories. There are no territories listed on the page.
2. Click **Create Territory**.
3. Enter the territory name.
4. Select an owner for the top territory, most likely the VP of Sales.

   The owner appears on the Team Members tab. You can add additional members to the team, and the owner himself can add members later.
5. From the territory **Type** list, select **Prime and Overlay**.

   When you select Prime and Overlay, descendant territories can be Prime Only, Overlay Only, or both.

6. From the **Enable Forecasting** list, select **Prime only** unless you're creating forecasts for overlay territories. This setting enables the territory to be used for forecasting. Your administrator enables the Enable Forecasting field using Application Composer, otherwise it's hidden.
7. Click **Save and Continue**.
8. Click the Dimensions tab.

   All enabled dimensions have `Any` for the coverage. This is correct for your top territory.
9. Save and close.

Add child territories. The child territory copies the parent territory information such as territory type, dimensions, and account inclusions. You then make changes as needed.

1. Select from your territories list the territory that will be the parent to your new territory.
2. Go to the Child Territories tab.
3. Click **Create Territory**.
4. Enter the territory name.
5. Select a different owner for the territory if needed.
6. Change the territory type, if needed.
7. If Territory Precedence is enabled, then you can select a territory function. Assignment compares all territories with the same function and gives precedence to the territories containing included accounts.
8. Click **Save and Close** to keep the definitions that match the parent. You then return to the Child Territories tab for the parent territory. Click **Save and Continue** to stay on the Summary tab for your new territory.
9. In the Dimensions tab, you have several choices in the Edit list, depending on your enabled dimensions and the coverage from the parent.
   - Edit Address Coverage
   - Clear Address Coverage
   - Edit Dimensions and Coverage

     Select a dimension and move the values you want to the Selected column. Or click **Add Members in Bulk** and enter several members or ranges of members separated by commas.
   - Remove All
10. To add accounts, select the Inclusions tab.
11. Click **Add Customers** and select **Accounts**.
12. Use the Exclusions tab to select customers to be excluded from the territory. (Use Application Composer to enable the Exclusions tab.)
13. Use the Team Members tab add and remove team members and designate the territory owner.
14. When you complete making all changes, click **Save and Close**.

    Your new territory is now active.

If Click to Edit is enabled, you can make changes to information such as territory owner on the workspace list page. Click a row to see the fields you can edit. Make your changes, then click Save or Discard Changes.

Territory Proposal Statuses

A territory proposal contains definitions for territories. It progresses through different statuses in its life cycle.

This table describes proposal statuses.

Status	Description
Draft	The proposal is first created, and different users can participate to make changes to their child territories.
Pending Activation	The owner requests that the proposal be activated. The proposal is in pending activation status until the activation date.
Activated	After the owner requested activation and the activation date is reached the proposal is activated and the territories become active.
Failed	Any changes introduced to territories as part of this proposal aren't made.

Territory Proposal Rules

Use territory proposals to explore and evaluate new territory definitions.

Keep these rules in mind:

- Only one definition for a territory can be active at a time.
- You can freely create, edit, and delete territories within a proposal without affecting active territory definitions.
- A territory owner can update a proposal with changes to a subordinate's territory.
- If a given territory is updated in two different proposals, and both of them get activated, the changes of the proposal that's latest to get activated will override the changes in the other proposal. A territory that's added to territory proposal A, but then deleted from proposal B which gets activated first, is reinstated when proposal A is activated.
- If a proposal contains territories added to a parent territory that's now deleted, the new territories are deleted during proposal activation.
- A maximum of 500 territories can be children of the same parent territory.

Examples of Using Analytics to Test Territory Proposals

View graphs on the Analytics tab to compare your proposed territory changes to existing active territories to determine if your proposal achieves the goals you set. Will the new territories be more equitable and productive?

Also, evaluate territory changes in multiple proposals, or see the results of territory changes made within a single proposal.

Scenario

You want to see how much the number of customers changed between the proposed territory version with new geographic boundaries and the active version. You select the territory and choose the Number of Customers metric for the current quarter and Version Comparison, Active Version Comparison. You see significantly more customers in your proposed territory.

Next you compare all child territories of the selected territory and see that only one child has a significant change in the number of customers and you determine that you need to realign the child territories.

Territory Coverage

Territory Coverage

A territory defines who will sell what to whom. You define territory boundaries using dimensions and criteria, not by creating rules.

Use these to define a coverage area:

- Dimensions

  Values that define what to include in the territory using categories such as address, product, and industry
- Inclusion Criteria

  A list of specific customers or partners, whether or not they meet the dimensional definition. These customers don't have to be designated as named accounts.

  - Customer Hierarchy: You can choose to include the customer hierarchy for the selected customer. All customers for the selected customer hierarchy will be assigned to the territory.
  - Filtering Conditions: Defined dimensions apply to the included customers and their hierarchies so that only customers that match the dimension definitions get assigned to the territory.
  - Other Dimensions: Product or sales channel dimensions defined for all of the included customers or partners.
- Exclusion Criteria

  A list of specific excluded customers or partners to be omitted from the territory whether or not they meet dimension definitions. These customers don't have to be designated as named accounts to be excluded. You can choose to also exclude the customer hierarchy for the selected customer.
- Overrides: A way to override what's inherited from a source territory.
- Resource-Centric Coverage

  The resource-centric territory hierarchy is generated from your resource hierarchy when you enable forecasts using the quick setup. The Refresh Territories from Resources process synchronizes your territories periodically to match your latest resource hierarchy. The resources become the territory owners.

  > **Note:** Before you run Refresh Territories from Resources, you must have at least one dimension enabled using the Enable Dimensions and Metrics task and perform the Load and Activate action.

> **Note:** We recommend full reassignment to be scheduled for each object. The frequency of this schedule can be different from one object to another, depending on requirements.

Territory Coverage for Partners

A partner is an organization party with a partner profile associated and an assigned Partner usage. Partners are defined in the Partner Center.

Similar to direct sales, channel managers have corresponding sales territories pertaining to partner sales activities. Some channel managers are assigned to specific partners. Some channel managers are assigned to customers for sales activities that involve partners. Channel manager territories can be defined by the following coverage models.

- *Coverage Defined by End Customer Characteristics (Customer-Centric)*

  Define the coverage using the characteristics of the end customer, and specific inclusions and exclusions. As an example, a channel manager is assigned to cover all the indirect opportunities where the end customer is located in California.

- *Coverage Defined by Partner Characteristics (Partner-Centric)*

  Coverage is defined using the following attributes of a partner organization:

  - Primary geographical location of the partner
  - Organization Type of the partner (for example, private, public, government owned, nonprofit)
  - Industries served by the partner (for example, high tech, manufacturing, banking, pharmaceutical)
  - Size of the partner
  - Three auxiliary dimensions are available for partners based on the customer categories classification model

- *Individually Selected Partners*

  Select partners to directly assign to or exclude from a partner-centric territory. As an example, a channel manager is assigned to a partner named AA Solutions. This channel manager will be assigned to all indirect opportunities where AA Solutions is the partner. The opportunities for included partners can be additionally qualified by product and sales channel.

Territories with No Coverage

You can create a territory that has no coverage by clicking Remove All under Edit on the Dimensions tab. The dimensions have a blank coverage, rather than the value Any. The territory is indirectly defined by the coverage of its descendant territories. You can assign quota to the territory and it can participate in forecasting. The territory can't be automatically assigned to customers, leads, and opportunities, but you can see the assignments of its descendant territories. You can also assign the territory to an opportunity item manually.

Precedence During Assignment

When you include a customer in the coverage for a territory, that customer is also assigned to any territory with matching dimension coverage. If you don't want the customer to be assigned to both, then one solution is to add the customer as an exclusion from the second territory. Another solution is to enable territory precedence so that assignment automatically assigns the customer only to the territory with the inclusion coverage.

You can limit the automatic exclusion to the territories identified as belonging to the same group. For example, a primary salesperson Z has exclusive ownership of ABC Corporation, in Arizona. However, your product specialist team should also be assigned to ABC Corporation using dimension definitions. Use the Territory Function field to identify each territory with a function to group them.

Here are the territories and their definitions::

- The primary salesperson A's territory is defined with the Primary function.
- The coverage for A's territory is defined by address, including Arizona.
- The primary salesperson Z's territory is identified with the Primary function.
- The coverage for Z's territory contains ABC Corporation in Inclusions.
- The product specialist's territory is identified with the Technical Specialist function.
- The product specialist's territory is defined by address, including Arizona.

Here are the results of the assignment:

- ABC Corporation belongs to primary salesperson Z because the account inclusion takes precedence.
- ABC Corporation isn't assigned to Salesperson A's primary territory because the inclusion territory takes precedence over the territory defined by address.
- ABC Corporation is assigned to a Technical Specialist territory that covers Arizona.

Related Topics

- Examples of Territory Coverage
- Inheritance Territories
- Expose the Exclusions Tab and the Enable Forecasting Field

Examples of Territory Coverage

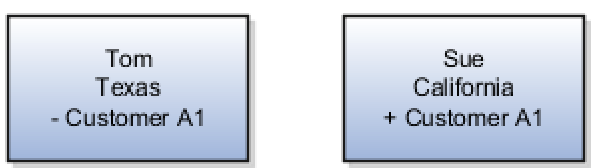
A territory coverage is a set of boundaries that define what's included or excluded in the territory and what can be sold. Dimensional coverage consists of the combination of one or more territory dimensions.

You can select individual customers (with or without a hierarchy) or partners to include or exclude from the territory in spite of dimension selections. These scenarios illustrate using different coverage.

Address Territories with Customer Inclusion and Exclusion

Two salespeople cover all customers in separate areas, Texas and California. Tom owns the Texas territory, and Sue has California. Sue has a special relationship with the A1 customer located in Texas. The solution is to add A1 as a customer inclusion to Sue's territory and as a customer exclusion in Tom's territory.

This figure shows Sue's and Tom's territories.



Define Individual Customers Only

Salespeople sell to ten to twenty individually assigned customers. You don't define a dimensional coverage, but manually assign the customers as inclusions.

Key Accounts with Subsidiaries

A Key Account Director is responsible for a few strategic accounts (named accounts) and all subsidiaries of the strategic accounts. You select each strategic account as an included customer, and choose to also include the hierarchy for each.

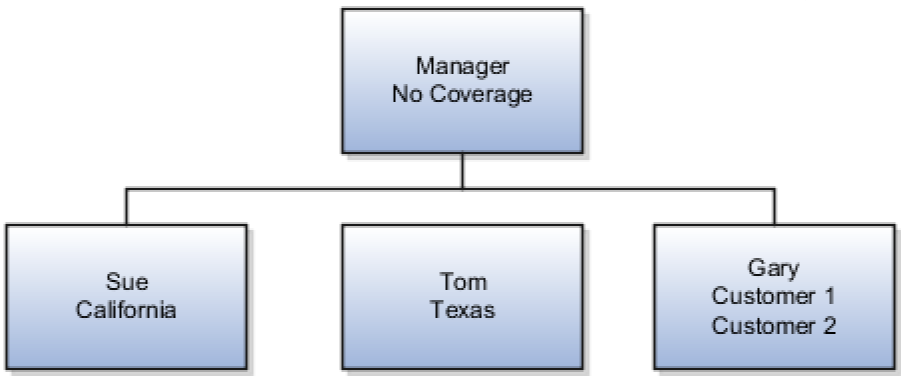
Forecasting Using a Parent Territory

Create a parent territory with no coverage except the coverage of its children. You can designate each child territory as Forecast not visible to territory owner, and then perform all your forecasting activities for the child territories using the parent territory.

Parent Territory with No Coverage

The territories for your sales managers don't require boundary definitions separate from the territory definitions of their salespeople. Create a parent territory with no defined coverage for the manager. The managers can view and update the territories for their groups, have access to their transactions, and can forecast sales for the group.

This figure shows the manager's territory with no defined coverage as the parent territory of three salespeople's territories. The salespeople's territories are defined by address and selected customers.



Related Topics

- Examples of Using Dimensional Coverage
- Examples of Dimensional Territories

Inheritance Territories

Sometimes organizations (for example, an industry overlay organization) shadow the prime sales organization. Inheritance territories offer an approach for simplifying the administration of territories for these shadow organizations. Inheritance territories consist of a source territory and one or more recipient territories.

A shadow (recipient) territory is linked to the prime territory with the source territory information. The inheritance territory feature is only available in the More Details pages, where changes to territories are managed using a proposal.

One additional benefit of defining inheritance territories, is that the administrator can override the territory dimensions on the recipient territory. Customer or partner inclusions and exclusions can also be inherited. The source and recipient territories can have different territory owners and can be placed in different hierarchies.

Example

Here's an example of a prime salesperson and a shadow industry salesperson. Jane owns the Northern California territory and is responsible for selling all products to all customers located in Northern California. The source territory, Northern California, has this dimensional coverage:

- Products: Any
- Industry: Any
- Address: United States > California > Northern CA

Chris is part of the industry overlay organization and shadows Jane, but Chris is only responsible for high tech and manufacturing customers located in Northern California. The recipient territory, Northern California HT&M has this dimensional coverage:

- Products: Any
- Industry: High Tech, Manufacturing
- Address: United States > California > Northern CA

In the Northern California HT&M territory, the high tech and manufacturing industry dimensions are considered overrides.

Related Topics

- Examples of Inherited Territory Coverage

Create a Territory Inheritance

You can set a territory as the source for the definitions of another territory. Then you only make changes in the one source territory, and the rest of the territories inherit the change.

1. Add a territory to a territory proposal to edit.
2. From the Actions menu, choose **Inherit** > **Edit Inheritance**.
3. Select the territory that contains coverage (dimensions or inclusions and exclusions, or both) that you want your proposed territory to inherit. Your territory inherits all coverage information from this source territory, unless you use overrides to change the coverage in the recipient. You can't have a chain of territory inheritances where territory B inherits from territory A, and B also is a source territory for territory C.

   > **CAUTION:** If you delete a source territory, the recipient territories aren't deleted, but automated updates to recipient territories stop.

4. Use dimensional overrides to modify what's inherited from the source.
5. Add or remove any coverage definitions to your proposed territory.
6. Activate your territory proposal.

   Recipient territories also inherit the Eligible for Quota, Revise Quota, Revision Reason, and Revision Description settings from the source territory.

Related Topics

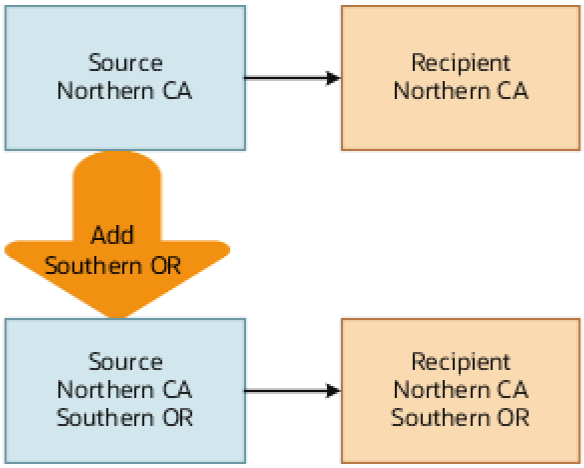
- Examples of Inherited Territory Coverage

Changes to Source Territories

Create one territory as the source and let the shadowing territories inherit the dimension definitions from the one source. Then you only make changes in the one source territory, and the rest of the territories inherit the change.

This is an easy way to keep dimension definitions synchronized for a number of territories.

In this chart, the address dimension in the source territory Is originally US > California > Northern CA. You add US > Oregon > Southern OR so the source territory includes both Northern CA and Southern OR. The recipient territories automatically change to match.



Update Recipients

After you make changes to a source territory, select the territory in the Territories table on the proposal. Go to the Actions menu and select **Inherit** > **Update Recipients**. The Territory Inheritance Recipient Update process makes changes to the recipient territories.

The default processing behavior uses the Maximum Number of Territories in Proposal parameter to 0 which uses a faster option to update active recipient territories without using proposals. This improves the performance when regenerating inheritance territories and minimizes the changes to recipient territories which is important for customers with large numbers of territories and complex territory definitions.

What do I need to know about changing recipient territories?

When you create a recipient territory, you use dimensional overrides to make changes to the proposed territory.

You can also make changes to recipient territories in a proposal at a later time. To end the inheritance relationship, change the source territory field to none.

Use Scheduled Processes to run the Update Inheritance Recipients process to update all recipient territories. This includes your changes and any inherited definitions from source territories. You can select a source territory to update, or leave that parameter blank to run all territories. The Maximum Number of Territories in Proposal parameter is set to 0 for best performance. This is important if you have a large number of territories or complex territory definitions. If you want to use proposals to update recipients, you can specify the maximum number of territories per proposal. The maximum you can enter is 500. This process can also be scheduled to run periodically.

Examples of Territories Defined by Geography

A common method of dividing sales territories is by geography.

Countries

You have a small sales team and sell products internationally by phone. All salespeople have the expertise to sell all products to all customers. You choose to define territories by country. Too many customers are in the United States for one salesperson, so you create territories for different states that have a parent territory for the country. You group several small countries by creating a parent zone in the geography hierarchy.

Postal Codes

Your company sells mostly through on-site visits to companies in a few major cities in North America and Europe. To service city customers adequately, you must assign several salespeople to each city. You choose to create territories defined by postal codes that form hierarchies with their parent territories, defined by country. Customers with locations that aren't within the assigned postal codes get assigned to the parent country territory.

Examples of Using Dimensional Coverage

Enable only the dimensions your organization requires for defining territories. These examples illustrate the use of different dimensions to assign customers, leads, and opportunity lines to the correct salespeople using defined territories.

Account Type

You want to assign major customers to Named accounts territories. A named account territory can have child territories identified by additional criteria, such as address. You also have territories with the account type of Not Named that include no major named accounts in the hierarchy.

Customer Size

One product line is suitable only for organizations above a certain size. Use the customer size dimension to target only the larger customers for the product line.

Industry

You sell one type of service to telecommunications companies, another service to utilities, and a third service for insurance companies. You can create territories for each using the Industry dimension.

Product

You sell a product line that requires salespeople to have a high degree of technical knowledge. Create separate territories for this product line.

Sales Channel

You delegate customers that are small to partner sales organizations by address.

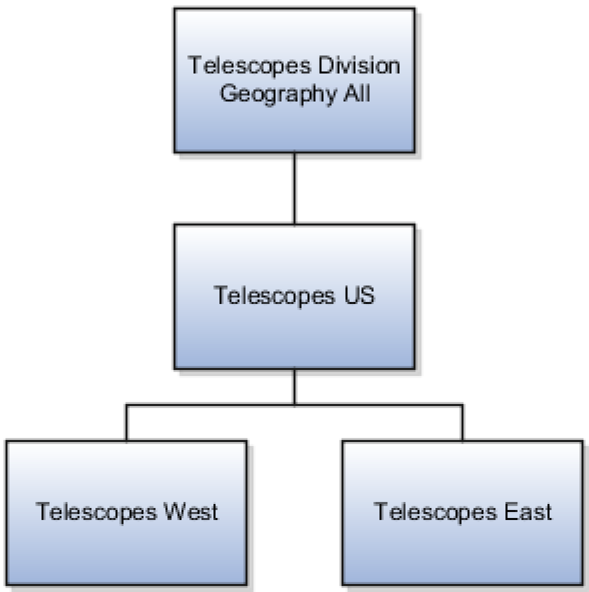
Examples of Dimensional Territories

This scenario illustrates using a combination of different dimensions to define a new hierarchy of territories.

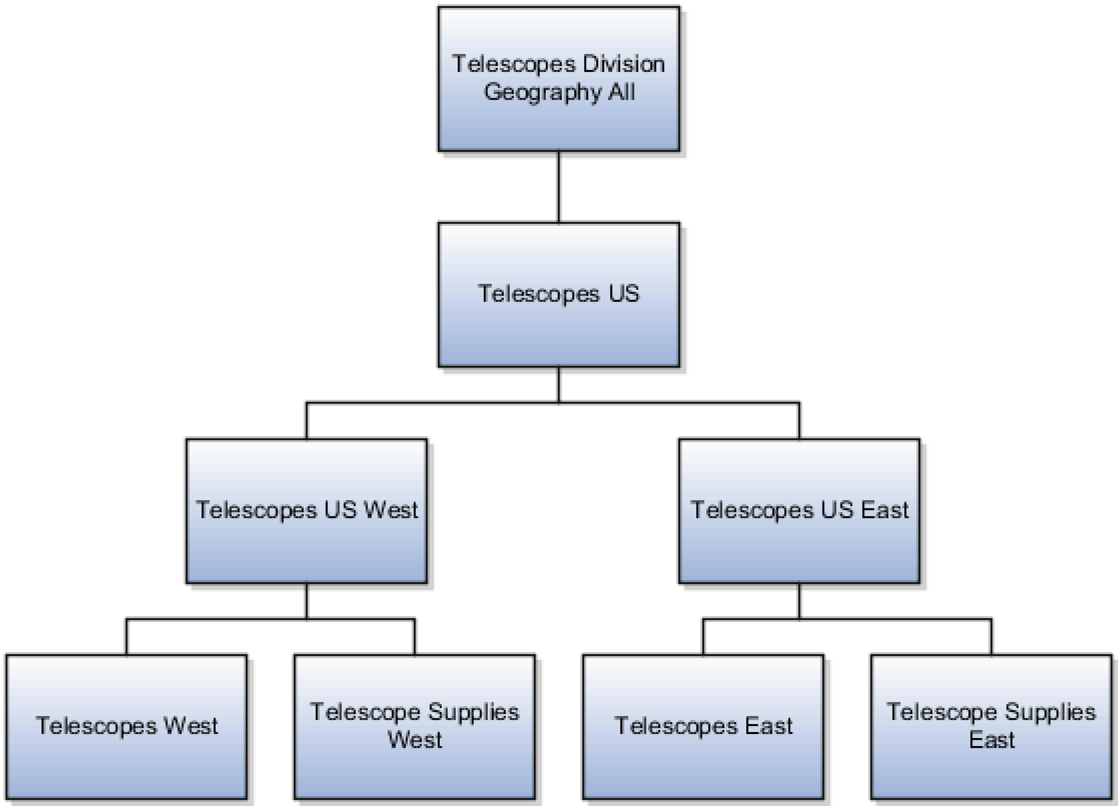
Scenario

The telescope division of your company manufactures and sells a special type of microscope as well as related accessories and supplies. Your company recently started supplying microscopes to two large universities and several colleges in the East. Management wants to focus on expanding this new market by dedicating several salespeople to this industry, and by assigning individual universities to territories.

This chart shows the current territory hierarchy for the division, divided into East and West United States with a parent territory to catch any accounts outside the United States. All territories for the Telescopes Division of the company include in the definition the product group: telescopes, accessories, and supplies.



Selling telescopes requires salespeople with more knowledge and experience. Therefore, you separate telescope sales from sales of accessories and supplies within each US region. To accomplish this, you define the Telescopes territories with the Telescopes product and the Telescopes Supplies territories with the Telescope Supplies and Accessories



product group.

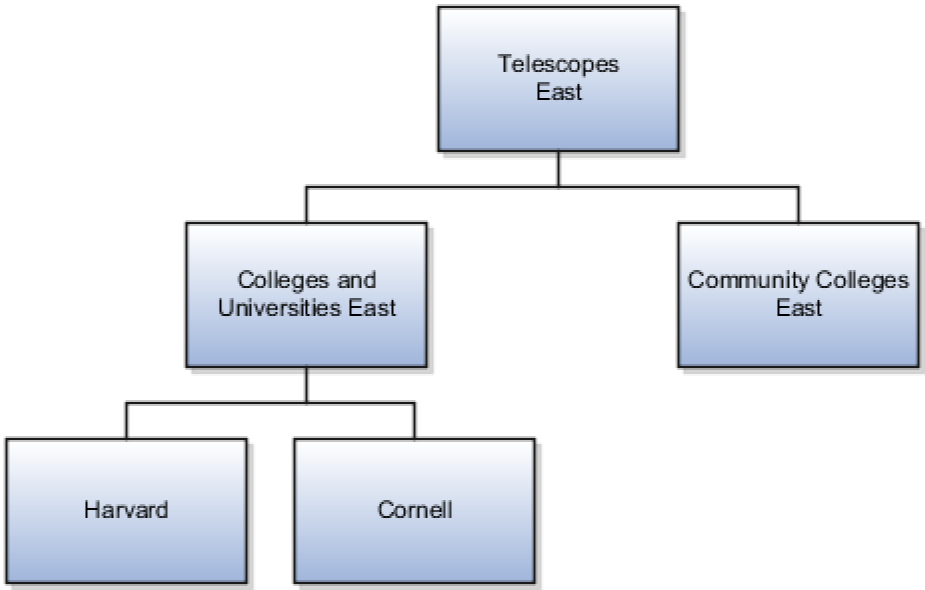
The Telescopes East territory is defined with these dimensions:

- Geography: East United States
- Product: Telescopes
- Industry: Any

The Telescope Supplies East territory is defined with these dimensions:

- Geography: East United States
- Product: Telescope Accessories and Supplies
- Industry: Any

You add two child territories defined by Industry dimension members for 4-year colleges and universities, and 2-year colleges. Within the 4-year colleges and universities territory, you add the two universities who are current customers as inclusions so they have dedicated salespeople to service them.



The Colleges and Universities East territory is defined with these dimensions:

- Geography: East United States
- Product: Telescopes
- Industry: Colleges and Universities - 4 year

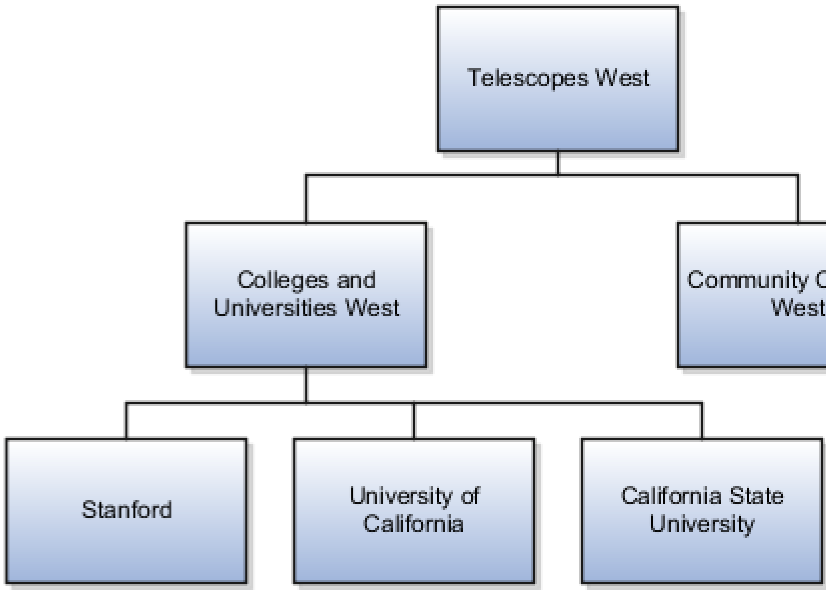
The Community Colleges East territory is defined with these dimensions:

- Geography: East United States
- Product: Telescopes
- Industry: Community Colleges - 2 year

Each university territory is defined with these dimensions:

- Included Customer: Harvard (for the Harvard territory)
- Included Customer: Cornell (for the Cornell territory)
- Other Dimensions, Product: Telescopes

You build the West United States territory hierarchy in the same way. Sales management identified three universities as named accounts even though they haven't yet purchased telescopes.



Examples of Inherited Territory Coverage

Use territory inheritance to make coverage changes to one source territory and automatically propagate those changes to recipient territories that have an inheritance relationship to the source territory.

Use overrides to change the dimensional coverage and other dimension information, and to qualify the included customers and their hierarchies to only those that match the override information.

In this example, the industry and product dimensions are enabled. This table provides the source territory definition.

Coverage Type	Definition	Details
Dimensional Coverage	Industry	Any
Dimensional Coverage	Product	Any
Included Customers	Customer A	Is in the high tech industry
Included Customers	Customer B	Is in the services industry
Included Customers	Customer C	Is in the utilities industry
Filtering Conditions	None	None
Other Dimensions	Product	Desktops, Laptops

Recipient Territory 1

The override for recipient territory 1 is *Industry: Services*.

Here's the resulting coverage for recipient territory 1.

Coverage Type	Definition	Details
Dimensional Coverage	Industry	Services
Dimensional Coverage	Product	Any
Included Customers	Customer A	Is in the high tech industry
Included Customers	Customer B	Is in the services industry
Included Customers	Customer C	Is in the utilities industry
Filtering Conditions	Industry	Services: Filters out Customers A and C
Other Dimensions	Product	Desktops, Laptops

Recipient Territory 2

The override for recipient territory 2 is *Industry: High Tech*.

Here's the resulting coverage for recipient territory 2.

Coverage Type	Definition	Details
Dimensional Coverage	Industry	High Tech
Dimensional Coverage	Product	Any
Included Customers	Customer A	Is in the high tech industry
Included Customers	Customer B	Is in the services industry
Included Customers	Customer C	Is in the utilities industry
Filtering Conditions	Industry	High Tech: Filters out Customers B and C
Other Dimensions	Product	Desktops, Laptops

Recipient Territory 3

The override for recipient territory 3 is *Product: Laptops*.

Here's the resulting coverage for recipient territory 3.

Coverage Type	Definition	Details
Dimensional Coverage	Product	Laptops
Dimensional Coverage	Industry	Any
Included Customers	Customer A	Is in the high tech industry
Included Customers	Customer B	Is in the services industry
Included Customers	Customer C	Is in the utilities industry
Filtering Conditions	None	None
Other Dimensions	Product	Laptops

Export and Import Management

Overview of Using Import Management to Import Territories

You can use import management to create, update, or delete sales territory records.

When using Import Management you export a single compressed file containing the files for sales territories, sales territory resources, sales territory coverage, or sales territory lines of business. You can select whether to export one, all, or any combination of the territory objects. You import separate files for the territory objects: sales territory, sales territory resource, sales territory coverage, or sales territory line of business. Additionally, you need separate import files for creating (or updating), and for deleting records.

1. If you plan to import to a proposal, then create a proposal in the territory More Details UI.
2. Export active territories or export your proposal.
3. Map your source data to object attributes.
4. Complete your changes for one or more comma separated values (CSV) import files.
5. Create the import activity.
6. Review your import results.
7. Review and activate your proposal, if you're using one.

Always specify the user-friendly public unique identifiers when creating, updating or deleting territory records. Here are some examples.

- Sales Territory

    - UniqueTerritoryNumber
    - ProposalNumber
    - ParentTerritoryUniqueTerritoryNumber
    - OwnerResourceNumber
- Sales Territory Resource
    - UniqueTerritoryNumber
    - ResourcePartyNumber
- Sales Territory Coverage
    - UniqueTerritoryNumber
    - CoverageNumber
- Sales Territory Line of Business
    - UniqueTerritoryNumber
    - LOBCode

When you delete a territory using import, all the descendant territories are also deleted.

Create separate files for creating and for deleting Sales Territory Resource, Sales Territory Coverage, or Sales Territory Line of Business records.

> **Tip:** Don't update records in the Sales Territory child objects. Instead, import to delete the record and then import to create the new record with the correct values.

Create New Territories

You can create multiple levels of territories within a single Sales Territory import file. When you create a hierarchy of territories in single import file, enter a UniqueTerritoryNumber for your parent territory in the sales territory import file. Then you can use this same number as the ParentTerritoryUniqueTerritoryNumber of your child territories. Another reason to enter a UniqueTerritoryNumber is you can use the same UniqueTerritoryNumber in the child import files (sales territory resource, sales territory coverage, sales line of business). Here are other things to keep in mind:

- You must include the effective start date when you create an active territory.
- Include the Proposal Number when creating a new territory that's part of a proposal. It's a good idea to set the unique territory number to a combination of the Territory Number and the Proposal Number.
- When creating a new territory, the processing of the sales territory object import activity should complete prior to processing any of the sales territory child object (sales territory resource, sales territory coverage, sales territory line of business) import activities. The sales territory child object import activities can be processed in any order.

File Size

Each import file has a limit for the number of records you're importing.

- Sales Territory 50,000
- Sales Territory Resource 50,000

- Sales Territory Lines of Business 50,000
- Sales Territory Coverage 500,000

Coverage Tips

Here are some suggestions for your coverage data:

- To create the coverage Any for an individual dimension, don't include a row in the sales territory coverage file for that dimension.
- To create the coverage Any for ALL dimensions, include a row in the sales territory coverage file with the UniqueTerritoryNumber and the CoverageTypeCode. Leave all other columns blank.
- To create the coverage for a Customer Inclusion or Exclusion, the application attempts to look up the account using RegistryID, but if not found it uses OriginalReference. If values for both RegistryID and OriginalReference are passed, then the RegistryID is used first.

A Sales Territory Coverage record can be deleted using these fields:

- Unique territory number (UniqueTerritoryNumber): The public unique identifier number of the territory

  Coverage type code (CoverageTypeCode): Possible values are REGULAR, INCLUSION, or EXCLUSION

  Dimension code (TerrDimensionCode)

  Dimension Field: The value for the relevant dimension field representing the territory coverage record to delete.

Dimension Codes and Fields

Dimension	Dimension Code	Dimension Field
Sales Channel	(None)	Either SalesChannelCode or SubSalesChannelCode
Product	Prod	ProductGroupNumber or ProductGroupId OR ItemNumber or InventoryItemId
Account Type	AccTp	AccountTypeCode
Address	Addr	AddressCountry and (optionally) one or more of the following: AddressState AddressProvince AddressCounty AddressCity AddressPostalCode AddressElementAttribute1 AddressElementAttribute2 AddressElementAttribute3 AddressElementAttribute4

Dimension	Dimension Code	Dimension Field
		AddressElementAttribute5
Auxiliary 3	Aux3	Auiliary3Code
Auxiliary 1	Aux1	Auiliary1Code
Auxiliary 2	Aux2	Auiliary2Code
Business Unit	BUnit	BusinessUnitName or BusinessUnitId
Customer Size	CSize	CustomerSizeCode
Geography	Geo	GeographyId or GeographyName (the full path needs to be provided, for example >United States>CA or ~Global~North America) For Geo ranges, also provide GeographyHighId or GeoHighName. The full path needs to be provided (optional).
Industry	Indst	IndustryCode
Organization Size	OrgTp	OrganizationTypeCode
Partner	Prtnr	PartnerNumber or PartnerId
Account	Acct	RegistryId or OriginalReference or AccountId

Related Topics

- Create the Territory Hierarchy Using Proposals
- Import Your Sales Territory Data
- Import Your Sales Territory Resource Data
- Import Your Sales Territory Coverage Data
- Import Your Sales Territory Line of Business Data

Export Territory Data

Use export to create CSV files that are ready for your changes. To export territory records to update, create, or delete, select the Language Independent Header option under Additional Options in the Export Activity.

Use a Proposal

Do you want to import your territory data to a proposal so you can review it before activating?

- You can create a territory proposal in the territory More Details UI, and don't add any existing territories to it. Make a note of the proposal number to use when you import. You have nothing to export with an empty proposal.

- Create a territory proposal. Add to it territories you want to change or delete.

Use **Tools** > **Export Management** to export territories in your proposal. To export all territories within a proposal, use the filter criteria for the sales territory object: `ProposalNumber = 'XXXX'` (Replace XXXX with your proposal number.)

Export Active Territories

Do you want to export your active territories, make changes, and import directly back to live territories? You only need the records you want to change, such as just a coverage change or a resource (team member) change. Use filters to restrict the records you export. Here are some examples:

- To export all active territories: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>'`. An example of the date format is `'2019-11-19T00:00:00-00:00'`
- To export all active territories owned by Lisa Jones: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>' AND Owner = 'Lisa Jones'`
- To export all active territories and coverage with the product Business Services: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>'`

  Also use the Filter Criteria for the Sales Territory Coverage object: `ProductGroupName = 'Business Services'`
- To export all active territories and coverage with the included customer Pinnacle Technologies: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>'`

  Also use the Filter Criteria for the Sales Territory Coverage object: `AccountName = 'Pinnacle Technologies'`
- To export all active territories and all industry dimension coverage: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>'`

  Also use the Filter Criteria for the Sales Territory Coverage object: `DimensionName = 'Industry'`

> **Tip:** If you renamed a dimension, then include both the TerrDimensionCode and DimensionName in the export of the sales territory coverage object. The TerrDimensionCode value is required when adding sales territory coverage records.

Export a Territory Hierarchy

You can export an active or draft territory and all of its descendants, including territory team, coverage, and line of business information.

- Use the export filter criteria to specify the unique territory number for the top territory in your hierarchy to be exported. For example, `TerritoryHierarchyUniqueTerritoryNumber = 'CDRM_199'`
- If your hierarchy includes draft territories, then you must add the top territory in your hierarchy to a proposal first. Use the unique territory number generated in the proposal when you create the filter for export.
- To export only active territories, filter with the unique territory number plus the status code "finalized" and an effective end date greater than today. Here's an example: `TerritoryHierarchyUniqueTerritoryNumber = 'CDRM_199' AND StatusCode = 'FINALIZED' AND EffectiveEndDate > '2021-01-01T00:00:00-00:01'`

Related Topics

- What's the difference between unique territory number and territory number?
- Export Data

Create Import Templates for Territories

When you import territories, you use separate files for coverage, line of business, and territory team members. Coverage, line of business, and team members (resources) are part of the parent object sales territory.

You can create hierarchical import templates to group the files together the same way each time you import. The parent sales territory file is imported first, then the files for the child objects. A template also includes the import mode, such as to delete records.

Create a Template

This example shows how to create a template for territories.

1. Navigate to **Tools** > **Import Management** > **Import Configuration** > **Manage Template** > **Create Template**.
2. On the **Create Template** page, name the template **Create and Update Territories and Coverage**.
3. Select the import object **Sales Territory**.
4. Click the **Import Object Hierarchy** link to select the object hierarchy.
5. Select the **Enabled** check box for each object to import. You can select the child objects under the parent hierarchy only after selecting the parent object.
6. Select the import mode **Update and create records**.
7. Save and close.
8. Refresh to see your new template.

Suggested Templates

Create these templates to cover most of your future import needs.

Note: Don't use import templates to import territory coverage along with sales territories or resources.

Template Name	Objects	Import Mode
Create Territory and Team and Coverage	Sales Territory • Sales Territory Resource	Create records, or Update and create records
Update Territories	Sales Territory • Sales Territory Resource	Update and create records
Add Territory Coverage	Sales Territory Coverage	Create records
Delete Territory	Sales Territory	Delete records
Delete Territory Resource	Sales Territory Resource	Delete records
Delete Territory Coverage	Sales Territory Coverage	Delete records

Related Topics

- Manage Hierarchical Import Templates

Import Approaches and Examples

Territory Import Approaches

You have flexible options for updating territories either incrementally with updates and deletions or with full territory definitions. You can also use the territory proposal feature to group together updates and activate them only when ready. Here are some approaches you can take.

- Update active territories
    - Proposals aren't used
    - Make incremental territory changes:
        - In the sales territory import file: enter rows for each territory with an updated owner or details such as type or function
        - In the sales territory resource file: enter rows for each territory team member to be added or removed
        - In the sales territory coverage file: enter rows for each territory customer inclusion to be added, or postal code to be removed

    For examples, see these topics:

        - Change Active Territory Coverage Using Export and Import Management
        - Change an Active Territory Owner Using Export and Import Management
        - Add Customer Inclusions Using Import Management
        - Remove Customer Inclusions Using Import Management
- Update territories in a proposal where the original territory definition is included in the proposal
    - Add territories to be updated to a proposal
    - Make incremental updates only. For example, only dimension members to be removed or team members to be added are included in the import files
    - Use the unique territory numbers of the territories within the proposal in the import files
    - Activate the proposal after import

  See the Update Territories with a Proposal Using Export and Import topic for an example.

- Import territories to a new proposal
  - Create a new territory proposal. Don't add territories to the proposal. The import process doesn't create a proposal for you.
  - You import the full territory definition. For example, the sales territory, sales territory team, sales territory coverage, sales territory line of business import files contain the complete definition of the territory
  - Include the proposal number when creating a new territory to be part of a proposal. It's a good idea to set the unique territory number to a combination of the territory number and the proposal number.
  - Activate the proposal after import

  See the Update and Create Territories Using a New Proposal topic for an example.
- Create and delete territories in a hierarchy. See these example topics:
  - Create an Active Territory Hierarchy Using Import
  - Delete an Active Parent Territory Using Import Management
  - Create Parent and Child Territories With a Proposal Using Import
- Use import templates to group import files

  See the Import Territories Using a Template topic for an example.

Change Active Territory Coverage Using Export and Import Management

In this example, you have a territory called NA Sales Apps with several child territories. The coverage for some of these territories includes the product ERP Applications.

You want to change the product to Financial Applications. To do so, you can use the Export and Import Management to export the coverage file. Then import two coverage files to delete the unwanted coverage and create the new coverage.

Export the Sales Territories and Sales Territory Coverage

1. Click **Navigator** > **Export Management**.
2. Click **Create Export Activity**.
3. Name the export **North America Product**.
4. In the **Object** field, select **Sales Territory**.

   The name of your export file appears in the File Name field.
5. Select the **Language Independent Header** check box.
6. Click **Next**.
7. Select Sales Territory to set these attributes and filter:
   a. Change these fields in the Attributes region:
      - Move Unique Territory Number to Selected Fields and move it to the top.
      - Move Territory Name to the top.
   b. Click **Filter Name** and create this filter to export active territory details as well as draft territory details, if they exist:

   i. Find the **Name** field and click **Insert**.
   ii. Enter `LIKE 'NA Sales Apps*'`.

      The child territory names all begin with NA Sales Apps.
   iii. Click **Save and Close**.
8. The Sales Territory object is enabled. Select **Enabled** for the **Sales Territory Coverage** object.
9. Select Sales Territory Coverage and set these selected fields to be in this order:
   a. Unique Territory Number
   b. Territory Dimension Code
   c. Dimension Name
   d. Coverage Type Code
   e. Product Group Name
   f. Product Group Number
10. Click **Filter Name** and create this filter:
   a. Find the **TerrDimensionCode** field name and click **Insert**.
   b. Click the equals symbol.
   c. Enter `'Prod'`.
   d. Save and close.
11. Click **Next**.
12. Click **Submit**.

Edit the Exported Files

When the export is successful, you extract the files and modify them.

1. In the compressed export file, find and open the Coverage .CSV file.
2. Edit the file and save it to a new file name as a delete file to delete every coverage.

Name	Value
File name	Delete NA Sales ERP.csv
UniqueTerritoryNumber	Retain the value
CoverageTypeCode	Retain the value, for example, REGULAR or INCLUSION
TerrDimensionCode	Retain the value, for example, Prod
ProductGroupName	ERP Applications (Remove rows that don't contain this product group name.)
ProductGroupNumber	1-11E-262

> **Note:** When you delete an existing territory coverage for the product dimension, you must include the Unique Territory Number, Coverage Type Code, Territory Dimension Code, and Product Group Number.

3. Open the original file, make these changes, and save it to add coverage.

Name	Value
File name	Add NA Sales Fin.csv
UniqueTerritoryNumber	Retain the value
CoverageTypeCode	Retain the value, for example, REGULAR or INCLUSION
TerrDimensionCode	Retain the value, for example, Prod
ProductGroupName	Change ERP Applications to FIN Applications
ProductGroupNumber	Change 1-11E-262 to 1-11E-156

Note: When you create a new territory coverage for the product dimension, you must include the Unique Territory Number, Coverage Type Code, Territory Dimension Code, and Product Group Number.

Import Your Changed Files

Import your delete file first to remove the existing incorrect coverage. Then import the add file to add the new coverage.

1. Click **Navigator** > **Import Management**.
2. In the Manage Imports page, click **Create Import Activity**.
3. In the Enter Import Options page, select or enter these options.

Field Name	Value
Name	Delete ERP Apps coverage for NA Sales
Object	Sales Territory Coverage
File Name	Delete NA Sales ERP.csv
Import Mode	Delete records

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. In the Manage Imports page, click **Create Import Activity** to import your coverage additions..

8. In the Enter Import Options page, select or enter these options.

Field Name	Value
Name	Create ERP Apps coverage for NA Sales
Object	Sales Territory Coverage
File Name	Add NA Sales Fin.csv
Import Mode	Create records

9. Click **Next**.
10. In the Map Fields page, click **Next**.
11. Click **Submit**.
12. Verify that both of your imports completed.

Your changes are available in your active territories. Review the NA Sales Applications hierarchy and verify the changed Product dimension coverage.

Change an Active Territory Owner Using Export and Import Management

In this example, you have a territory called NA Sales Apps with several child territories. NA Sales Apps SouthWest and NA Sales Apps West are owned by John Dooley, and NA Sales Apps West Central is owned by Joe Hill.

John Dooley recently left the sales organization, so temporarily, his colleague, Joe Hill will be taking over John's territories. You can make this change without using a proposal or updating the whole territory definition.

Export the Sales Territories

1. Click **Navigator** > **Export Management**.
2. Click **Create Export Activity**.
3. Name the export **North America Product**.
4. In the **Object** field, select **Sales Territory**.

   The name of your export file appears in the File Name field.
5. Select the **Language Independent Header** check box.
6. Click **Next**.
7. The Sales Territory object is enabled. Select **Enabled** for the **Sales Territory Coverage** object.
8. Select Sales Territory to set these attributes and filter:
   a. Change these fields in the Attributes region and select the following order:
      i. Unique Territory Number
      ii. Territory Number

iii. Territory Name
iv. Owner Registry ID
v. Owner(Trans)

b. Click **Filter Name** and create this filter:

> **Note:** You can select a previous filter with this criteria instead of recreating it.

i. Find the **Name** field and click **Insert**.
ii. Enter `LIKE 'NA Sales Apps*'`.

The child territory names all begin with NA Sales Apps.

iii. Click **Save and Close**.

9. Click **Next**.
10. Click **Submit**.

Edit the Exported Files

When the export is successful, you extract the files and modify them.

1. In the compressed export file, find and open the Coverage.CSV file.
2. Open the original file and make these changes:

Name	Territory Name	Value
File name	NA	Change Owner.csv
OwnerResourceNumber	NA Sales Apps West	1855
OwnerTrans	NA Sales Apps West	Joe Hill
OwnerResourceNumber	NA Sales Apps Southwest	1855
OwnerTrans	NA Sales Apps Southwest	Joe Hill

3. Remove Joe Hill's NA Sales Apps West Central territory, because it needs no updates.
4. Save the file.

Import Your Changed Files

Import your delete file first to change the owner of the two territories.

1. Click **Navigator** > **Import Management**.
2. In the Manage Imports page, click **Create Import Activity**.

3. In the Enter Import Options page, select or enter these options.

Field Name	Value
Name	Change Territory Owner
Object	Sales Territory
File Name	Change Owner.csv
Import Mode	Update and create records

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. Verify that your import completed.

Your changes are available in your active territories. Review the NA Sales Applications hierarchy and verify the changed territory owners.

Add Customer Inclusions Using Import Management

This example provides sample import file data that restricts a territory to 2 product groups in 2 accounts.

Here's an explanation of the key fields in the sample import file

- You can use either the **RegistryId** or **OriginalReference** field values to identify an account.

  In this sample file, Apex Systems is identified by the RegistryId and Pinnacle Technologies by its OriginalReference.

  You can add the **AcountName** column to include your customer names. The column isn't used for import.
- Using the **IncludeHierarchyFlag** field, you can apply the sales territory to the account only or to the account and its subsidiaries in the account hierarchy.

  In this sample file, the value is Y for Pinnacle Technologies, so all its subsidiaries are included. The value for Apex Systems is N, so only the Apex Systems account is included.
- Product groups are identified by their **ProductGroupNumber**.

  Importing the product group name (**ProductGroupName**) is optional.

The following table lists the import file columns and values:

Field Name	Values for Apex Systems	Values for Pinnacle Technologies	Values for the Diagnostics Product Group	Values for the Services Product Group
UniqueTerritoryNumber	CDRM_380	CDRM_380	CDRM_380	CDRM_380

Field Name	Values for Apex Systems	Values for Pinnacle Technologies	Values for the Diagnostics Product Group	Values for the Services Product Group
CoverageTypeCode	INCLUSION	INCLUSION	INCLUSION	INCLUSION
TerrDimensionCode	`Acct`	`Acct`	`Prod`	`Prod`
RegistryId	999997569264400	(empty cell)	(empty cell)	(empty cell)
OriginalReference	(empty cell)	`DNB~638392020043`	(empty cell)	(empty cell)
IncludeHierarchyFlag	N	Y	(empty cell)	(empty cell)
ProductGroupNumber	(empty cell)	(empty cell)	300000095942114	300000095942151
ProductGroupName (optional)	(empty cell)	(empty cell)	Diagnostics	Services

Import Your File to Active Territories

Import your file.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

Field Name	Value
Name	Add Customer Inclusions NA Sales
Object	Sales Territory Coverage
File Name	< file name>.csv
Import Mode	Create records

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. Verify that the import activity completed successfully.

Your changes are available in your active territories. Review the sales territory and verify the new customer inclusions.

Remove Customer Inclusions Using Import Management

In this example, you create an import file to remove the customer inclusion record for the account Pinnacle Technologies from the NA Sales territory.

Use Export Management to locate the Coverage Number value for the sales territory coverage customer inclusion record for the account Pinnacle Technologies from the NA Sales territory. Create an import file to remove this customer inclusion and name it Remove Customer Inclusions NA Sales.csv.

Field Name	Value
UniqueTerritoryNumber	CDRM_380
CoverageTypeCode	INCLUSION
TerrDimensionCode	Acct
RegistryID **Note:** The OriginalReference or AccountID value can be used instead.	CDRM_1352

Import Your File to Active Territories

Import your file.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

Field Name	Value
Name	Remove Customer Inclusions NA Sales
Object	Sales Territory Coverage
File Name	Remove Customer Inclusions NA Sales.csv
Import Mode	Delete records

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.

7. Verify that the import activity completed successfully.

Your changes are available in your active territories. Review the NA Sales territory and verify the customer inclusion no longer exists.

Update Territories With a Proposal Using Export and Import

In this example, you have a territory called NA Direct Sales Apps with several child territories. The coverage for some of these territories includes the Customer Size Small. You want to change the Customer Size to Large.

You will also update the territory function to Sales Support. To do so, you can use Export and Import Management to incrementally update the sales territories. You export the sales territory and sales territory coverage files, and then import a coverage file to delete the unwanted coverage and import a coverage file to create the new coverage, and a sales territory import file to update the territory function.

Here's the process followed in this example.

1. Create a proposal and add the individual territories to be updated to the proposal.
2. Use Export Management to export all territories in that proposal.
3. Use the Export Management Activity filter criteria (proposal number) to export the sales territories that need to be updated. Include two objects: sales territory and sales territory coverage.
4. Edit your files for import. This approach uses a proposal to perform incremental updates to the territories, so you include only the territory records that require updates to the territory function in the sales territory import file. You include only the Small Customer Size territory coverage records to be removed in the DELETE sales territory coverage import file. You include only the Customer Size Large territory coverage records to be added in the CREATE sales territory coverage import file.
5. Import your changed files.
6. Review your proposal and activate it.

Create a Proposal

Create the proposal and add territories to be updated.

1. Navigate to **Sales** > **Territories**
2. Click the Sales Territories Hierarchy tab.
3. Click **Manage Proposals**.
4. Click **Create**.
5. Name the proposal **NA Direct Sales Apps Territory Export Proposal**.
6. Click **Save and View**.
7. Search for territories with a name that starts with NA Direct Sales Apps.
8. Select **NA Direct Sales**.
9. Click **View in Hierarchy**.
10. Expand the hierarchy and add these territories to the proposal:
    - NA Central region
    - NA Eastern region
    - NA Western region
11. Note down the number for the proposal from the Details section.
12. Click **Done** twice.

Export Sales Territory and Coverage Files

1. Navigate to **Export Management**.
2. Click **Create Export Activity**.
3. Name the export **Territory Export Proposal**.
4. In the **Object** field, select **Sales Territory**.

   The name of your export file appears in the File Name field.
5. Under Advance Options, select **Language Independent Header**.
6. Click **Next**.
7. The Sales Territory object is enabled. Enable the Sales Territory Coverage object.
8. Select **Sales Territory** to set these attributes and filter:

   a. Select these fields in the Attributes region:

      - Move **Unique Territory Number** to Selected Fields and move it to the top.
      - Proposal Number
      - Territory Number
      - Territory Name
      - Territory Function

   b. Click **Filter Name** and create this filter:

      i. Find the Proposal Number field and click **Insert**.
      ii. Click the equals symbol.
      iii. Enter your proposal number in single quotes.
      iv. Save and close.
9. Select Sales Territory Coverage and set these selected fields to be in this order:

   a. Coverage Number
   b. Unique Territory Number
   c. Coverage Type Code
   d. Territory Dimension Code
   e. Customer Size Code
10. Click **Filter Name** and create this filter:

    a. Find the **TerrDimensionCode** field name and click **Insert**.
    b. Click the equals symbol.
    c. Enter `'Csize'`.
    d. Save and close.
11. Click **Next**.
12. Click **Submit**.

Edit the Exported Files

When the export is successful, you extract the files and modify them to create three import files, one for sales territory and two for sales territory coverage.

1. In the compressed export file, find and open the territory CSV file.
2. Edit the file rows:

Unique Territory Number	Proposal Number	Territory Name	Territory Function
Leave value as exported	Leave value as exported	Leave value as exported: NA Central region	Add the territory function value: SALES_SUPPORT
Leave value as exported	Leave value as exported	Leave value as exported: NA Eastern region	Add the territory function value: SALES_SUPPORT
Leave value as exported	Leave value as exported	Leave value as exported: NA Western region	Add the territory function value: SALES_SUPPORT

3. Save to a new file name: Update NA Direct Sales Apps child territories.csv.
4. In the compressed export file, find and open the sales territory coverage CSV file.
5. Edit the file:

Coverage Number	Unique Territory Number	Coverage Type Code	Territory Dimension Code	Customer Size Code
Leave value as exported	Leave value as exported	Leave value as exported	Leave value as exported	Leave value as exported
Leave value as exported	Leave value as exported	Leave value as exported	Leave value as exported	Leave value as exported
Leave value as exported	Leave value as exported	Leave value as exported	Leave value as exported	Leave value as exported

6. save it to a new file name to **delete** a coverage: Delete NA Direct Sales child territories coverage.csv.
7. In the compressed export file, find and open the sales territory coverage CSV file.
8. Edit the file:

Coverage Number	Unique Territory Number	Coverage Type Code	Territory Dimension Code	Customer Size Code
Clear value	Leave value as exported	SALES_ACCOUNT_ CENTRIC	CSize	LARGE
Clear value	Leave value as exported	SALES_ACCOUNT_ CENTRIC	CSize	LARGE
Clear value	Leave value as exported	SALES_ACCOUNT_ CENTRIC	CSize	LARGE

9. save it to a new file name to **create** a coverage: Create NA Direct Sales child territories coverage.csv.

Import Your Files

Import your territory file.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

Field Name	Value
Name	Update NA Direct Sales Child Territories
Object	Sales Territory
File Name	Update NA Direct Sales Apps child territories.csv
Import Mode	Update and insert records

4. Click **Next**.
5. In the Map Fields page, click **Next**
6. Click **Submit**.

To import the sales territory coverage delete file:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

Field Name	Value
Name	Delete NA Direct Sales child territory coverage
Object	Sales Territory Coverage
File Name	Delete NA Direct Sales child territories coverage.csv
Import Mode	Delete records

3. Click **Next**.
4. In the Map Fields page, click **Next**.
5. Click **Submit**.

To import the sales territory coverage files:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

Field Name	Value
Name	Create NA Direct Sales child territory coverage
Object	Sales Territory Coverage
File Name	Create NA Direct Sales child territories coverage.csv
Import Mode	Create records

3. Click **Next**.
4. In the Map Fields page, click **Next**.
5. Click **Submit**.

Verify that your imports completed successfully.

Review Your Imported Territories and Activate the Proposal

Check your imported territories before you activate your proposal.

1. Navigate to **Sales** > **Territories**.
2. Click **More Details**.
3. Click **Manage Proposals**.
4. Click the **Territory Export Proposal**.
    a. Search for the territories in the proposal, such as NA Central and view them in the hierarchy.
    b. Show dimensions and confirm the customer size is correct.
    c. Confirm your changed territory function.
5. Click **Activate**.
6. If you get a warning about the activation date, click **Yes**.
7. Use Refresh to monitor the progress of the activation process. On completion the proposal appears in the Completed Proposals list.

Your changes are available in your active territories.

Update and Create Territories Using a New Proposal

In this example, you have a territory called NA Direct Sales Apps with several child territories. The coverage for some of these territories (NA Central region, NA Eastern region, NA Western region) includes the customer size Small.

You want to change the customer size to Large, and update the territory function to Sales Support. You also want to create a new territory named NA Not 48 Region and owned by Alex Smith to cover large, direct customers in Hawaii and Alaska. Perform these steps:

1. Create a new proposal. Don't add territories to this proposal. Your import won't automatically create a proposal.
2. Import complete definitions of each territory to be created or updated.
3. Activate the territory proposal.

Create a New Empty Proposal

1. Navigate to **Sales** > **Territories**.
2. Click the Sales Territories Hierarchy tab.
3. Click **Manage Proposals**.
4. Click **Create**.
5. Name the proposal **Update and Create Territories Proposal**.
6. Click **Save and View**.
7. Expand the Details section and note down the proposal number. In this example it's `CDRM_47012`.
8. Click **Done** twice.

Create the Sales Territory Import File

1. Open an existing exported territory CSV file or create a new file.
2. Save this example file as `Update and Create NA Direct Sales child territories in new proposal.csv`.
3. Remove all rows for other territories from your export file.
4. Enter a row for each new or updated territory. If you're updating a territory, create the unique territory number by using the proposal number, hyphen, territory number. If you leave the territory number blank for the application to create, then enter the unique territory number using the correct proposal number-hyphen-a unique made-up number.

UniqueTerri	ProposalNu	TerritoryNu	Name	TypeCode	CoverageM	TerritoryFu Code	OwnerReso Number	OwnerTrans	ParentUnique TerritoryNumber
CDRM_4701 CDRM_122	CDRM_ 47012	CDRM_122	NA Central region	PRIME	SALES_ ACCOUNT_ CENTRIC	SALES_ SUPPORT	9147	Michael Rogers	CDRM_249
CDRM_4701 CDRM_451	CDRM_ 47012	CDRM_451	NA Eastern region	PRIME	SALES_ ACCOUNT_ CENTRIC	SALES_ SUPPORT	9147	Michael Rogers	CDRM_249
CDRM_4701 CDRM_318	CDRM_ 47012	CDRM_318	NA Western region	PRIME	SALES_ ACCOUNT_ CENTRIC	SALES_ SUPPORT	5110	Alex Smith	CDRM_249
CDRM_4701	CDRM_ 47012	Leave blank (the application allocates a territory number) or enter a unique territory number, for example 12539	NA Not 48 region	PRIME	SALES_ ACCOUNT_ CENTRIC	SALES_ SUPPORT	5110	Alex Smith	CDRM_249

Create the Sales Territory Coverage Import File

1. Open an existing exported territory coverage CSV file or create a new file.
2. Save this example file as `Update and Create NA Direct Sales child territory coverage in new proposal.csv`.
3. Remove all rows for other territories from your export file.
4. Enter coverage rows as needed for each new or updated territory. Copy the unique territory numbers from you territory import file. Cells in this table containing N/A should have no entries in your import file.

UniqueTerritoryNum	TerrDimensionCode	CoverageTypeCode	CustomerSizeCode	SalesChannelCode	GeographyName
CDRM_47012-CDRM_122	`SChnl`	REGULAR	NA	ZPM_DIRECT_CHANNEL_TYPES	NA
CDRM_47012-CDRM_122	Geo	REGULAR	NA	NA	GLOBAL-North American Sales-United States-Midwest
CDRM_47012-CDRM_122	Geo	REGULAR	NA	NA	GLOBAL-North American Sales-United States-South
CDRM_47012-CDRM_122	CSize	REGULAR	LARGE	NA	NA
CDRM_47012-CDRM_318	`SChnl`	REGULAR	NA	ZPM_DIRECT_CHANNEL_TYPES	NA
CDRM_47012-CDRM_318	Geo	REGULAR	NA	NA	GLOBAL-North American Sales-United States-West
CDRM_47012-CDRM_318	CSize	REGULAR	LARGE	NA	NA
CDRM_47012-CDRM_451	`SChnl`	REGULAR	NA	ZPM_DIRECT_CHANNEL_TYPES	NA
CDRM_47012-CDRM_451	Geo	REGULAR	NA	NA	GLOBAL-North American Sales-United States-Northeast

UniqueTerritoryNum	TerrDimensionCode	CoverageTypeCode	CustomerSizeCode	SalesChannelCode	GeographyName
CDRM_47012-CDRM_451	CSize	REGULAR	LARGE	NA	NA
CDRM_47012-CDRM_1234	`SChnl`	REGULAR	NA	ZPM_DIRECT_CHANNEL_TYPES	NA
CDRM_47012-CDRM_1234	Geo	REGULAR	NA	NA	GLOBAL-North American Sales-United States-West-Pacific-AK
CDRM_47012-CDRM_1234	Geo	REGULAR	NA	NA	GLOBAL-North American Sales-United States-West-Pacific-HI
CDRM_47012-CDRM_451	CSize	REGULAR	LARGE	NA	NA

Import Your Files

Import your territory file and your coverage file.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

Field Name	Value
Name	Update and Create NA Direct Sales child territories
Object	Sales Territory
File Name	Update and Create NA Direct Sales child territories in new proposal.CSV
Import Mode	Update and insert records

4. Click **Next**.
5. In the Map Fields page, review the mappings. Optionally apply a specific mapping, or click **Save as** to save the mapping or map any unmapped fields.
6. Click **Next**.

7. Click **Submit**.

To import the sales territory coverage file:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

Field Name	Value
Name	Update and Create NA Direct Sales child territory coverage
Object	Sales Territory Coverage
File Name	Update and Create NA Direct Sales child territory coverage in new proposal.CSV
Import Mode	Update and insert records

3. Click **Next**.
4. In the Map Fields page, review the mappings. Optionally apply a specific mapping, or click **Save as** to save the mapping or map any unmapped fields.
5. Click **Next**.
6. Click **Submit**.
7. Verify that all of your imports completed successfully.

Review Your Imported Territories and Activate the Proposal

Check your imported territories before you activate your proposal.

1. Navigate to **Sales** > **Territories**.
2. Click **More Details**.
3. Click **Manage Proposals**.
4. Click the **Territory Export Proposal**.
5. Find your added or changed territories and verify the coverage.
6. Click **Activate**.
7. If you get a warning about the activation date, click **Yes**.
8. Use Refresh to monitor the progress of the activation process. On completion the proposal appears in the Completed Proposals list.

Your changes are available in your active territories.

Create an Active Territory Hierarchy Using Import

In this example, you create an active territory and active child territory, each with an owner and dimensional coverage. The parent territory is for a sales manager, and a child territory for a salesperson, under the NA Diagnostics territory branch owned by Kerry Evans.

Create Your Import Files

You need this information to start:

- Parent Territory NA Diagnostics has the unique number: 26088
- Salesperson Lisa Jones has the resource registry ID: 15
- Sales Manager Mateo Lopez has the resource registry ID: 16534

You can save a copy of an exported Sales Territory and an exported Sales Territory Coverage file to use as templates for the import files.

1. Open an exported Sales Territory CSV file.
2. Replace the field values with these territory definitions:

UniqueTerrit	TerritoryNum	CoverageMo	Name	StatusCode	TypeCode	ParentUnique TerritoryNum	OwnerResou Number	Description
JC1234	(Leave blank)	SALES_ ACCOUNT_ CENTRIC	NA Diagnostics - San Mateo	FINALIZED	PRIME	26088	16534	Large Customers in San Mateo County - Diagnostic products
JC5678	(Leave blank)	SALES_ ACCOUNT_ CENTRIC	NA Diagnostics - SC and RWC	FINALIZED	PRIME	JCT1234	15	Large Customers in Cities San Francisco - Diagnostic products

3. Save the file to the new file name Active Parent and Child Territory Import.csv.
4. Open an exported Sales Territory coverage CSV file.
5. Replace the field values with these values for Mateo's territory coverage:

UniqueTerrit	TerrDimensic	CoverageTyp	ProductGrou	ProductGrou	CustomerSize	AddressCoun	AddressCoun	AddressCity
JC1234	Prod	REGULAR	300000095	Diagnostics	(Leave blank)	(Leave blank)	(Leave blank)	(Leave blank)
JC1234	CSize	REGULAR	(Leave blank)	(Leave blank)	LS_LARGE	(Leave blank)	(Leave blank)	(Leave blank)
JC1234	`Addr`	REGULAR	(Leave blank)	(Leave blank)	(Leave blank)	US	San Mateo	(Leave blank)

6. Add values for Lisa's territory coverage to the same file:

UniqueTerrit	TerrDimensic	CoverageTyp	ProductGrou	ProductGrou	CustomerSiz	AddressCoun	AddressCoun	AddressCity
JC5678	Prod	REGULAR	300000095	Diagnostics	(Leave blank)	(Leave blank)	(Leave blank)	(Leave blank)
JC5678	CSize	REGULAR	(Leave blank)	(Leave blank)	LS_LARGE	(Leave blank)	(Leave blank)	(Leave blank)
JC5678	`Addr`	REGULAR	(Leave blank)	(Leave blank)	(Leave blank)	US	(Leave blank)	San Francisco

7. Save the file to the new file name Active Parent and Child Territory Coverage Import.csv.

Import Your Files for Active Territories

Import the sales territory file first to create the parent and child territories. Then import the sales territory coverage file to add the new coverage for both territories.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

Field Name	Value
Name	Import Parent and Child Territory
Object	Sales Territory
File Name	Active Parent and Child Territory Import.csv
Import Mode	Update and create records

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. Verify that the import activity completed successfully.

Next, import the sales territory coverage file:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

Field Name	Value
Name	Import Parent and Child Territory Coverage

Field Name	Value
Object	Sales Territory Coverage
File Name	Active Parent and Child Territory Coverage.csv
Import Mode	Update and create records

3. Click **Next**.
4. Click **Next**.
5. Click **Submit**.
6. Verify that your import completed successfully.

Delete an Active Parent Territory Using Import Management

In this example, you want to delete a parent territory (NAM Parent Territory which covers the countries in North America, and its three child territories which cover United States, Canada, and Mexico).

You achieve this by creating a sales territory import file that contains the unique territory number of the parent territory you want to delete. All child territories are also deleted during import.

1. Create your comma separated delimiter file that contains the column name **UniqueTerritoryNumber** and the value of the unique territory number of the NAM parent territory.
2. Click **Navigator** > **Import Management**.
3. In the Manage Imports page, click **Create Import Activity**.
4. In the Enter Import Options page, select or enter these options.

Field Name	Value
Name	Delete NAM Parent Territory
Object	Sales Territory
File Name	Delete NAM Parent Territory.csv
Import Mode	Delete records

5. Click **Next**.
6. In the Map Fields page, click **Next**.
7. Click **Submit**.
8. Verify that the import activity completed.
9. Go to your active territories and confirm that the parent and child territories are gone.

Import Territories Using a Template

Your import template includes the hierarchy, if needed, of the territory object as the parent and the child objects coverage, line of business, and sales team (resources). In this example, you have three files to import:

1. Update NA Direct Sales child territories.csv
2. Delete NA Direct Sales child territories coverage.csv
3. Create NA Direct Sales child territories coverage.csv

Import Using Hierarchical Import Template Files

Import the delete coverage file first to remove existing incorrect coverage. You can import it directly or use the Delete Territory Coverage template recommended in the Create Templates for Territory Imports topic.

1. Navigate to **Tools** > **Import Management** > **Import from Template**.

   The **Template Summary** section shows the list of available templates for use, along with the top-level import object. When you select a template, the **Hierarchy Objects** section shows the object hierarchy for the template.
2. Select the **Create Territory and Team and Coverage** template and click **Continue with Template**. On the **Enter Import Options** page, your object hierarchy is preselected and the advanced import configurations are already selected for you. If required, you can change these configurations for your import.
3. Click **Choose File** for the Sales Territory object and select the Update NA Direct Sales child territories.csv file.
4. Click **Choose File** for the Sales Territory Coverage object and select the Create NA Direct Sales child territories coverage.csv file.
5. Click **Next**.
6. In the **Sales Territory Map Fields** page, review the mappings. Optionally apply a specific mapping, or click **Save as** to save the mapping or map any unmapped fields.
7. Click the Sales Territory Coverage subtab to review mappings. Optionally apply a specific mapping, or click **Save as** to save the mapping or map any unmapped fields.
8. Click **Next**.
9. Review your import details on the **Review and Submit** page, and submit.
10. Verify that all of your imports completed successfully.

Related Topics

- Create Import Templates for Territories
- Manage Hierarchical Import Templates

Create Parent and Child Territories with a Proposal Using Import

In this example, you create a territory and child territory, each with an owner and dimensional coverage. You import the territories to an empty proposal and then activate the proposal.

The parent territory is for a sales manager, and a child territory for a salesperson , under the NA Diagnostics territory branch owned by Kerry Evans. The sales manager territory is owned by Mateo Lopez and the child territory is owned by Lisa Jones.

You can create multiple levels of territories within a single Sales Territory import file. When you create a hierarchy of territories in a single import file, enter a UniqueTerritoryNumber for your parent territory in the sales territory import file. Then you can use this same number as the ParentUniqueTerritoryNumber of your child territories. Another reason to enter a UniqueTerritoryNumber is you can use the same UniqueTerritoryNumber in the child import files (sales territory resource, sales territory coverage, and sales line of business). Here are other things to keep in mind:

- Include the Proposal Number when creating a new territory that's part of a proposal. It's a good idea to set the unique territory number to a combination of the Territory Number and the Proposal Number. A territory proposal must be created in advance. The import process doesn't automatically create proposals when importing territories.
- When creating a new territory, the processing of the sales territory object import activity should complete prior to processing any of the sales territory child object (sales territory resource, sales territory coverage, sales territory line of business) import activities. The sales territory child object import activities can be processed in any order.
- The Import from Template feature can be used to group the uploading and processing sequence of individual sales territory, sales territory team, and sales territory coverage files.

Create a New Empty Proposal

1. Navigate to **Sales** > **Territories**.
2. Click the Sales Territories Hierarchy tab.
3. Click **Manage Proposals**.
4. Click **Create**.
5. Name the proposal **Create Sales Manager and Salesperson Territory**.
6. Click **Save and View**.
7. Expand the Details section and note down the proposal number. In this example it's **CDRM_40012**.
8. Click **Done** twice.

Create Your Import Files

You need this information to start:

- Parent Territory NA Diagnostics has the unique number: 26088
- Salesperson Lisa Jones has the resource registry ID: 15
- Sales Manager Mateo Lopez has the resource registry ID: 16534
- The proposal number you noted, 40012 in this example.

You can save a copy of an exported Sales Territory and an exported Sales Territory Coverage file to use as templates for the import files.

1. Open an exported Sales Territory CSV file.
2. Replace the field values with these territory definitions:

UniqueTerri	TerritoryNu	ProposalNu	CoverageM	Name	StatusCode	TypeCode	ParentUniq TerritoryNu	OwnerReso Number	Description
JC1234_ CDRM_ 40012	JC1234	CDRM_ 40012	SALES_ ACCOUNT_ CENTRIC	NA Diagnostics - San Mateo	FINALIZED	PRIME	26088	16534	Large Customers in San Mateo County -

UniqueTerri	TerritoryNu	ProposalNu	CoverageM	Name	StatusCode	TypeCode	ParentUniq TerritoryNu	OwnerReso Number	Description
									Diagnostic products
JC5678_ CDRM_ 40012	JC5678	CDRM_ 40012	SALES_ ACCOUNT_ CENTRIC	NA Diagnostics - SC and RWC	FINALIZED	PRIME	JCT1234	15	Large Customers in Cities San Francisco - Diagnostic products

3. Save the file to the new file name Active Parent and Child Territory Proposal Import.csv.
4. Open an exported Sales Territory coverage CSV file.
5. Replace the field values with these values for Mateo's territory coverage:

UniqueTerrit	TerrDimensic	CoverageTyp	ProductGrou	ProductGrou	CustomerSize	AddressCoun	AddressCoun	AddressCity
JC1234_ CDRM_40012	Prod	REGULAR	3000000959	Diagnostics	(Leave blank)	(Leave blank)	(Leave blank)	(Leave blank)
JC1234_ CDRM_40012	CSize	REGULAR	(Leave blank)	(Leave blank)	LS_LARGE	(Leave blank)	(Leave blank)	(Leave blank)
JC1234_ CDRM_40012	`Addr`	REGULAR	(Leave blank)	(Leave blank)	(Leave blank)	US	San Mateo	(Leave blank)

6. Add values for Lisa's territory coverage to the same file:

UniqueTerrit	TerrDimensic	CoverageTyp	ProductGrou	ProductGrou	CustomerSize	AddressCoun	AddressCoun	AddressCity
JC5678_ CDRM_40012	Prod	REGULAR	3000000959	Diagnostics	(Leave blank)	(Leave blank)	(Leave blank)	(Leave blank)
JC5678_ CDRM_40012	CSize	REGULAR	(Leave blank)	(Leave blank)	LS_LARGE	(Leave blank)	(Leave blank)	(Leave blank)
JC5678_ CDRM_40012	`Addr`	REGULAR	(Leave blank)	(Leave blank)	(Leave blank)	US	(Leave blank)	San Francisco

7. Save the file to the new file name Active Parent and Child Territory Coverage Proposal Import.csv.

Import Your Files for Active Territories

Import the sales territory file first to create the parent and child territories. Then import the sales territory coverage file to add the new coverage for both territories.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

Field Name	Value
Name	Import Parent and Child Territory in Proposal
Object	Sales Territory
File Name	Active Parent and Child Territory Proposal Import.csv
Import Mode	Update and create records

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. Verify that the import activity completed successfully.

Next, import the sales territory coverage file:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

Field Name	Value
Name	Import Parent and Child Territory Coverage in Proposal
Object	Sales Territory Coverage
File Name	Active Parent and Child Territory Coverage Proposal Import.csv
Import Mode	Update and create records

3. Click **Next**.
4. Click **Next**.
5. Click **Submit**.
6. Verify that your import completed successfully.

Review Your Imported Territories and Activate the Proposal

Check your imported territories before you activate your proposal.

1. Navigate to **Sales** > **Territories**.
2. Click **More Details**.
3. Click **Manage Proposals**.
4. Click **Create Sales Manager and Salesperson Territory**.
5. Search for the territory **NA Diagnostics - San Mateo**.
6. Select the territory and click **View in Hierarchy**.
7. The territory appears in the Territories table. Expand the hierarchy to see the child territory.
8. Click **Show Dimensions**. Review the coverage details for both territories.
9. Click **Activate**.
10. If you get a warning about the activation date, click **Yes**.
11. Use Refresh to monitor the progress of the activation process. On completion the proposal appears in the Completed Proposals list.

Your changes are available in your active territories.

Related Topics

- Import Territories Using a Template

FAQs for Territories

Frequently Asked Questions (FAQs) for Territories

This section contains some frequently asked questions (FAQs) when setting up and maintaining territories. Scroll or search to find answers to common questions.

When does a territory administrator define territories?

Sales managers define territories because they have the knowledge about their assigned territory and about their salespeople, and are best able to assign territories equitably. Sales managers delegate the territory definition activity to sales operations to save time.

Create an administrator who can modify all territories and quotas by giving her the Sales Administrator job role. Or select the Administrator check box for a territory team member in your territory. This person must also have a job role that includes the Territory Management Administration Duty. Now that person can view your territory and modify all territories lower in your territory hierarchy. He can also assign sales quotas for you.

What's a territory overlap?

When two or more territories are children of the same parent, and reference the same intersection of dimension members, then the territories overlap.

For example, a child territory with the dimension member Virginia and a child territory with the dimension member United States overlap.

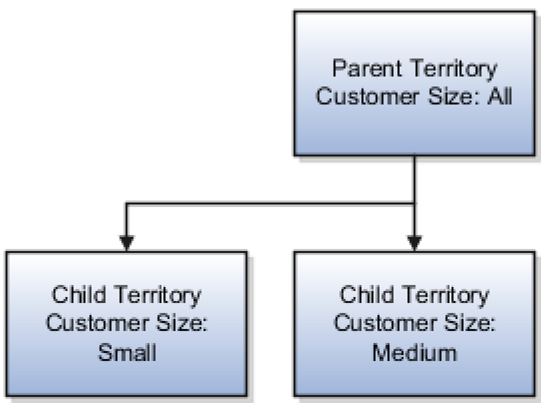
An overlap is a problem if it's accidental. If it results in two salespeople mistakenly assigned the same area, the overlap causes conflicts and incorrectly assigned sales quotas. A deliberate overlap is useful for assigning additional salespeople or technical experts to the same areas also covered by the salespeople who have quotas. For example, the same area requires four salespeople with separate territories, but only one technical expert. It's a good practice to assign one of the territories the territory type of Overlay.

For more details, see the following discussion on Oracle Customer Connect: *Resolving Gaps and Overlaps based on Account Territory Assignments*.

What's a territory gap?

A territory gap consists of a dimension member that belongs to a territory but doesn't belong to any children of that territory.

In this chart the parent territory is defined by the size of the customer, and the available dimension members for customer size are small, medium, and large. There are child territories for small and medium sized customers, but the territory for large customers is missing and creates a gap.



For more details, see the discussion on Oracle Customer Connect: *Reduce Admin Burden when Resolving Gaps and Overlaps using Territories Workspace*.

Why did my OBIEE report include old and deleted territories?

Only active territories can be assigned to sales objects such as accounts, opportunities, and leads. Territories in tables can be active, draft (in a proposal), or soft deleted.

For OBIEE reports, add these criteria to include only active territories:

- StatusCode = FINALIZED
- EffectiveEndDate is greater than today's date

Why did postal codes not appear sorted when I edited coverage?

If your coverage values exceed 1000 for a territory, the values aren't sorted. Sorting more than 1000 values slows down your UI.

What's a line of business?

A line of business is a category for particular kinds of commercial enterprise. Modify a territory by selecting one or more lines of business for that territory.

For example, during implementation a software company uses a broad categorization of products for lines of business and adds education, licenses, and consulting to their selection list for line of business.

What's the difference between unique territory number and territory number?

The unique territory number and territory number are both user-friendly public identifiers for a territory. If updates are made to active territories only, using Import Management or the Less Details territory UI, then the unique territory number and territory number are the same.

If updates are made to territories in a proposal using Import Management or the territory More Details UI. then the unique territory number and territory number are different when there's a draft version of the territory (the territory is in a proposal). When the proposal is activated, the unique territory number is replaced by the territory number. (This assumes the Retain Territory Version option is enabled.)

4 Extend Territory Management

How can I configure and extend application pages for territories?

Using Application Composer, you can modify many items that appear on the application pages for sales territories.

Use Application Composer to modify these pages:

- Territories landing page
- Create Territories page
- Details page (see a discussion of subtabs in the Details page section)

Make changes such as these examples:

- Hide or show standard fields.
- Set fields as required.
- Set field default values.
- Reorder columns.
- Change column labels.
- Add custom fields (all types).

Note: To extend the application pages for territories, use the Sales Territory object in Application Composer.

Territories Landing Page

You can modify the Territories landing page. For example, you can hide standard fields or show custom fields.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Landing Page Layouts, duplicate the standard layout to create a new layout.

Create Territories Page

You can modify the Create Territories page. For example, you can hide standard fields, make a field required, add a default value, and show custom fields.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout.

   To enhance run time usability for your end users, optionally group custom fields into field groups.

Details Page

The Details page consists of multiple subtabs that display along the side of the page. You can modify most of these subtabs. You can also add subtabs to display records from child or related objects, for example.

To add custom fields to certain subtabs available from the Details page, you must first navigate to those subtab target objects in Application Composer to create the fields. After creating the fields on the target object, you can then navigate back to the desired details page layout for the Sales Territory object to add those fields to the specific subtabs.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout.
4. When making changes to the Details page, select the subtab you want to change first. These subtabs are available from the Details page. Use the subtabs to configure which standard and custom fields display at run time. You can also add a new tab.
    - Summary
    - Dimensions

      This tab isn't extensible.
    - Inclusions

      This tab isn't extensible.
    - Exclusions

      This tab isn't extensible.
    - Team Members

      Use the Sales Territory Resource object to create custom fields as needed.
    - Child Territories

      Use the Sales Territory object to create custom fields as needed.

Configure and Extend Territory Management

You can modify a variety of regions in Territory Management using Application Composer. Application Composer lets you create custom fields, actions, and links, which you then add for display.

You can also create custom child objects, which you can add to certain pages as subtabs or tree nodes.

This topic addresses the configurability of the More Details pages only. To understand how to configure the set of application pages for these objects, see the related topic.

To access Application Composer:

1. Go to the **Navigator** menu.
2. In the Configuration section, select **Application Composer**.

Understanding Which Territory Pages Are Extensible

To modify Territory pages, you need to know which pages and regions are extensible, and which options to select in Application Composer to make those changes.

These Sales objects are associated with Territory pages:

- Sales Territory
- Sales Territory Resource

This table lists Territory pages and regions, and the related objects that you can access in Application Composer to modify those pages. For example, the Territory Team subtab on the Edit Territory Proposal page, Profile tab is extensible. To create custom fields that you can later add to the Territory Team tab, you must select the Sales Territory Resource object in Application Composer and create your custom fields.

Territory Page	Territory Region	Underlying Business Object
Overview page	Search dialog	Sales Territory
Overview page	Details region for a selected territory, Summary region on the Profile tab	Sales Territory
Overview page	Details region for a selected territory, Additional Information region on the Profile tab, Territory Team tab	Sales Territory Resource (child object of Sales Territory)
Overview page	Current Territory Proposals region	Sales Territory Proposal
Overview page	Completed Territory Proposals region	Sales Territory Proposal
Creation page	Create Territory Proposal dialog from the Current Territory Proposals region	Sales Territory Proposal
Details page	Details region for a selected territory, Profile tab, Summary region	Sales Territory Proposal

Next, expose your custom fields by accessing the appropriate Application Composer configuration page, listed in the following section.

> **Note:** To make only minor user interface changes to Territory pages without creating new objects or fields, use Page Composer instead of Application Composer.

Adding Your Changes to the User Interface Pages

To add custom fields to the Territory regions listed in the table in the previous section:

1. Navigate to the Application Composer Overview page.
2. In the object tree, select the **Sales Territory** object.

3. Select the **Fields** node and create your custom fields.
4. Select the **Pages** node.
5. On the Desktop Pages tab, select the configuration page hyperlink related to the Territory region that you want to modify.

This table indicates which Sales objects populate which Territory pages and regions, as well as Application Composer configuration pages where you can make user interface changes on those pages and regions.

Business Object	Configuration Page in Application Composer	Related Territories Page	Related Territories Region
Sales Territory	Select the **Pages** node for this object, then **click** Edit Local Search.	Search Territories page from the Overview page	None
Sales Territory	Select the *Pages* node for this object, then click **Edit Summary Form.**	Overview page	Details region for a selected territory, Summary region on the Profile tab

Related Topics

- How can I configure and extend application pages for territories?

Create Custom Territory Attributes for Territory Assignment

Create custom attributes for sales territories and then use those attributes in territory assignment to match with customer attributes in the account, opportunity, lead, deal, or partners objects.

These territory custom attributes can be viewed and managed in active territories, territory proposals, REST services, and export and import management.

Note: Custom Sales Territory Resource attributes or Sales Territory custom child object attributes aren't supported in territory assignment. Now, let's create and use a custom territory attribute for the sales lead object as an example. Here are the high-level steps:

1. Create a custom attribute for the Sales Territory standard object.
2. Add the custom territory attribute to the Sales Lead assignment.
3. Map the custom attributes you created for Sales Territory and Sales Lead objects.

Create a Custom Attribute for the Sales Territory Standard Object

1. In an active sandbox, go to the Application Composer.
2. Create a fixed choice list called Branch for the **Sales Territory** standard object.
3. In the List of Values region, create a new lookup type **MKL_LEAD_BRANCH** for Branch, and add lookup codes for each of the company branches.
4. Save the field.

5. Next, add the Branch field to the Sales Lead Detail page.
6. Publish the sandbox.

Add the Custom Territory Attribute to the Sales Lead Assignment

1. In the Setup and Maintenance work area, use the **Manage Sales Lead Assignment Objects** task:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Assignment Objects
2. Select **Sales Lead Territory**.
3. On the Attributes tab, click **Add Row**.
4. From the **View Object Attribute** drop-down list, select a standard or custom lookup field you want to use. For example, assume you created a custom lookup field, Branch. The lookup field will be available in the drop-down list. Select it.
5. Enter **Candidate Information Sequence**. This is the sequence in which the attribute is shown in the displayed record.
6. Leave the **Inactive** check box unselected.
7. Save and publish.

Next, add the attribute assignment mapping to use this attribute to match with a standard or custom Sales Lead attribute, or to filter the matching territories.

Map the Custom Sales Territory and Sales Lead Attributes

1. In the Setup and Maintenance work area, use the **Manage Sales Lead Assignment Objects** task:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Assignment Objects
2. Select **Sales Lead**.
3. In the Candidates tab, within the Sales Lead Territory: Rule Categories subtab, select **Sales Lead Territory Rule Category**.
4. In the Sales Lead Territory: Mapping Sets subtab, select **Mapping Set 1**.
5. In the Mapping Set 1: Mappings table, click **Create**.
6. Define attributes for these fields:

Mapping Field	Value You Select
Type	Attribute
Exact Match	Select the check box
Candidate Object	Sales Lead Territory
Work Object	Sales Lead
Candidate Object Attribute: Low	Select the custom territory field you created. In this example, Branch.
Null Value Handling	Derive Mapping Value
Work Object Attribute: Low	Select the custom lead field you created. In this example, Branch.

7. Click **OK**.
8. Repeat steps 5 to 7 for each mapping set.
9. Save and publish.