Oracle Fusion Cloud Sales Automation

How do I assign work using territories, access groups, and rules?

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1 About This Playbook

About the Work Assignment Playbook

This playbook is intended for sales administrators who are implementing work assignment using sales territories, access groups, and rules. To learn how to set up sales territories and discussion of sales territory use cases, see the playbook *How do I set up Sales Territories?*.

2 Work Assignment

Overview of Assignment Processing Components

You can use assignment processes to assign resources (for example, salespeople or territory owners) to the business objects they work on, such as an opportunity or a lead. Once assigned, resources and territory owners, along with their managers, have visibility into the business object.

Candidate and Work Objects

When setting up assignment, you should be familiar with two types of assignment objects: candidate objects and work objects:

- Work objects are the business objects that get assigned, for example, accounts, opportunities, leads, partners, and deals.
- Candidate objects are the possible pool of assignment candidates, for example resources or territories.

Territory-Based Assignment

After you set up your territories, territory-based assignment matches territory dimensions and attributes to work objects. You can set up territory-based assignment to be completely automated, to happen on-demand, or you can use a combination of these settings. Territory-based assignment requires that you set up your territories and resource hierarchy, set profile options to configure assignment, and run assignment processes.

For an introduction to setting up territory-based assignment, start with the topic, *Overview of Sales Territory and Assignment Setup*.

Rule-Based Assignment

Rule-based assignment lets you set up additional rules used to assign resources to work objects. Rule-based assignment lets you capture attributes not defined in territory-based assignment. Once you set up the rules containing conditions that records must meet, then resources get assigned to the object when they match the rule conditions.

For example, you can use rules to:

- Assign a certain salesperson to the sales team when the customer is located in specific state or region.
- Assign the accelerated leads expert to leads whose time frame is less than three months.
- Calculate lead rank based on lead score.

Rule-based assignment requires that you plan your rules, create the rules using the rules UI, and set profile options to configure assignment, in addition to any scheduled processes that must be run.

Assignment Profile Options

Each of the business objects available in assignment has its own set of profile options that allow you to further configure assignment.

Scheduled Processes

Scheduled processes are batch jobs that capture data and allow business objects to act on that data. You must schedule several processes when using assignment.

Assignment Reports

You can use the Diagnostic Dashboard to generate reports about assigned objects and the volume of territory data involved in assignment.

Implementation Concepts for Assignment

Considerations for Configuring Assignment

Assignment is the process of selecting a candidate object and executing the association with a work object. Assignment consists of three phases:

- Setup phase: Setting up assignment processing through assignment configuration
- Matching phase: Matching rules or mappings are evaluated to find the right assignees from a list of possible candidates
- Assignment phase: The assignment of matching candidates is handled

An assignment configuration is predefined for each sales application providing assignment processing. This assignment configuration is available from one of these setup tasks:

- Manage Customer Center Assignment Objects
- Manage Sales Assignment Manager Objects
- Manage Sales Lead Assignment Objects

You can use these setup tasks to add or remove assignment attributes, define the relationship between each work object and candidate object, and define mapping sets and mappings that drive territory-based assignment and rule categories that drive rule-based assignment.

> **Note:** Use the Manage Sales Assignment Manager Objects task for opportunity assignment.

The predefined assignment configuration also includes the mapping sets and mappings that drive territory-based assignment.

To best plan the configuration, consider these points.

- Assignment objects
- Attributes
- Related candidates
- Mappings sets and mappings
- Rule categories, rule sets, and rules

Assignment Objects

An assignment object is a data entity or a collection of data treated as a unit, such as a sales account, an opportunity, or a lead. During assignment configuration, carefully consider which of your business objects require assignment, and create work objects only for those.

A set of assignment objects is predefined for the assignment of territories or resources to accounts, partners, opportunities, leads, and deals.

Attributes

You use attributes to further define assignment processing. For example, you might want to assign a sales representative (resource) to an opportunity (assignment object), based on the risk level of the opportunity. In this case, you select the attribute of the opportunity work object that corresponds to risk level, and the attribute of the resource candidate object that corresponds to name or email. Selecting these attributes makes them available for mappings and for conditions on your rules. Therefore, ensure that you select the attributes that reflect the criteria that you want to use for matching candidate objects to work objects.

Several attributes are predefined as assignment attributes for each assignment object.

Related Candidates

Candidate objects are related to work objects, and, for each relationship, the appropriate assignment mode (such as matching and scoring) and processing options are predefined. You must not modify these predefined settings except for the **No Matches Handling** option for the Sales Lead work object. The **No Match Handling** option controls the assignment action when no matching candidate is found. By default, this is set to **Remove current assignment**. You can change this to **Retain current assignment**, which retains the current candidate assignment when no matching candidate is found. You can also change it to **Error**, which generates an error if no matching candidate is found.

Mappings Sets and Mappings

Assignment mapping sets and their related mappings drive territory-based assignment. The mapping sets determine which mappings are used, and the sequence mapping sets are used in territory-based assignment. The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing.

Default mapping sets and their related mappings are predefined.

Rule Categories, Rule Sets, and Rules

The application provides default rule categories. These rule categories identify the type of rule processing being performed, such as matching, scoring, classification, or territory. Rule sets group the assignment rules and determine the additional processing performed, such as using scores for each candidate and filtering the candidates assigned to top or random matches. Rules are defined to execute rule-based assignment. Rules are designed to return candidates if they match a set of criteria, are within a defined scoring range, or are of a specific classification.

Create rules using work objects, candidate objects, and attributes that you already established. When designing your rules, carefully consider how you want to match candidates to work objects. For example:

- Do you want resources assigned based on their geographic location, their product knowledge, on the status or score of an object, or a combination of any of these attributes?
- Do you want to match candidates only, or do you want to match candidates and score them?
- In a multiple-candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score?

Related Topics

- What types of assignment rules can I create?
- Assignment Rule Components

Assignment Objects and Rules Setup Data Migration

This topic explains exporting and importing assignment objects and rules setup data, along with the points to consider while moving the setup data.

Almost all application implementations require moving functional setup data from one instance into another at various points in the lifecycle of the applications. For example, a typical case in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You can move functional setup configurations for assignment objects or assignment rules from one application instance into another by exporting and importing configuration packages from the Manage Configuration Packages page.

To export and import assignment setup data, you should start by defining an implementation project for the required assignment setup task:

- Manage Customer Center Assignment Objects
- Manage Object Sharing Assignment Objects
- Manage Object Sharing Rules
- Manage Sales Assignment Manager Objects
- Manage Sales Assignment Manager Rules
- Manage Sales Lead Assignment Objects
- Manage Sales Lead Assignment Rules
- Manage Service Assignment Objects
- Manage Service Assignment Rules

The Manage Configuration Packages setup task exports the assignment objects or rules setup data.

A configuration package contains the setup import and export definition. The setup import and export definition is the list of setup tasks and their associated business objects that identifies the setup data for export as well as the data itself. You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.

You can export a configuration package once you create it, or at any time in the future. During export, appropriate setup data will be identified based on the setup export definition and added to the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Therefore you must publish the assignment objects and rules before export. After the export completes, you can download the configuration package as a compressed archive of multiple XML files, move it to the target application instance, and upload and import it. You must review and publish the assignment objects and rules setup data in the target application instance to make them available for assignment processing.

See the chapter about importing and exporting setup data in the Using Functional Setup Manager guide for more details.

Considerations for Exporting and Importing Setup Data

Based on your implementation, you might have to follow different approaches while exporting and importing assignment setup data.

Consider these points:

- If your implementation is using territory-based assignment only, then the implementation project must only include the Assignment Objects setup tasks.
- If your implementation is using territory-based assignment with rule filtering or rule-based assignment, the implementation project should include both the Assignment Objects and Assignment Rules setup tasks.
- If you aren't sure whether your implementation is using territory or rule-based assignment, then Oracle recommends that you include both Assignment Objects and Assignment Rules setup tasks in the implementation project.
- The sequence of the tasks and business objects should remain per the default sequence.

You can delete assignment objects, assignment attributes, rule categories, rule sets, rules and conditions in a test environment. If the setup data subsequently is exported and then imported into another environment, for example a production environment, then the data in the target database isn't removed.

If your implementation plans to import and export setup data for assignment objects and assignment rules, you must ensure not to delete assignment objects, rule categories, rule sets, and rules. You must set them to inactive in case you want to delete them. Additionally, you must not delete assignment rule conditions. Instead, you must set the rule to inactive and then recreate the rule excluding the condition that's no longer needed.

Related Topics

- Overview of Setup Data Export and Import

Example of Uploading Assignment Objects and Rules Setup Data to a CSV File

This topic explains exporting and importing assignment objects and rules setup data to a CSV file, along with the points to consider while moving the setup data.

When you enter or update a large volume of setup data for a task, using user interfaces to individually enter or update them may not be the most efficient method. In such cases, you can upload setup data in bulk by using export and import processes at the task level. This method requires that your setup data is available in a CSV file format.

To export and import assignment object and rules setup data, you should start by defining an implementation project for the required assignment setup task:

- Manage Customer Center Assignment Objects
- Manage Object Sharing Assignment Objects
- Manage Object Sharing Rules

> **Note:** Access Groups and Access Group Members must exist in the target environment before you export and import for this setup task.

- Manage Sales Assignment Manager Objects
- Manage Sales Assignment Manager Rules
- Manage Sales Lead Assignment Objects
- Manage Sales Lead Assignment Rules
- Manage Service Assignment Objects
- Manage Service Assignment Rules

Note: You need the following privileges to export and import assignment objects and rules setup data:

- Submit Export Setup Data Process (ASM_SUBMIT_EXPORT_SETUP_DATA_PROCESS_PRIV)
- Submit Import Setup Data Process (ASM_SUBMIT_IMPORT_SETUP_DATA_PROCESS_PRIV)
- Task-specific privileges

Refer to the Oracle Applications Cloud Security Reference for Common Features guide for detailed information about task-specific privileges.

Export and Import Setup Data Considerations

Based on your implementation, you might have to follow different approaches while exporting and importing assignment setup data.

Consider the following points:

- If your implementation is using territory-based assignment only, then the implementation project must only include the Assignment Objects setup tasks.
- If your implementation is using territory-based assignment with rule filtering or rule-based assignment, the implementation project should include both the Assignment Objects and Assignment Rules setup tasks.
- If you aren't sure whether your implementation is using territory or rule-based assignment, then Oracle recommends that you include both Assignment Objects and Assignment Rules setup tasks in the implementation project.
- Access Groups and Access Group Members must exist in the target environment before you export and import using the Manage Object Sharing Rules setup task.
- The sequence of the tasks and business objects should remain per the default sequence.

The application lets you delete assignment objects, assignment attributes, rule categories, rule sets, rules and conditions in an environment, for example test. If that setup data subsequently is exported and then imported into another environment, for example production, the data in the target database isn't removed.

If your implementation plans to import and export setup data for assignment objects and assignment rules, you must not delete assignment objects, rule categories, rule sets, and rules. You must set them to inactive in case you want to delete them. Additionally, you must not delete assignment rule conditions. Instead, you must set the rule to inactive and then recreate the rule excluding the condition that's no longer needed.

Export Assignment Objects and Rules Setup Data to a CSV File

To export assignment objects and rules setup data to CSV file, follow these steps:

1. Select **Navigator** > **My Enterprise** > **Setup and Maintenance** and go to setup pages that you want. For example, to export Manage Sales Assignment Manager Objects, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Assignment Manager Objects
2. From the **Actions** menu, select **Export to CSV file**. This option is disabled if the task doesn't support export.
3. Select **Create New**. You can export all existing setup data represented by the Manage Sales Assignment Manager Objects task.
   - If Scope is supported for the task, you can select appropriate scope values to filter the setup data you want to export.
   - You can also download the template without exporting the existing setup data in the environment. To do so, select the **Export only template files** check box.
4. Click **Submit** to start the export process.
5. Select **Export to CSV file** to see the latest process. Monitor the process until it completes.
6. Select the process once it completes to review the results. Verify that the process completed without any errors before you download and extract the CSV file.
7. You may find more than one CSV file if there are more than one business object associated with the task.

Prepare Assignment Objects and Rules Setup Data in a CSV File

To enter or modify the assignment objects and rules setup data in the CSV file, follow these steps:

1. Open Microsoft Excel and click the Data tab.
2. In the **Get External Data** group, click **From Text**.
3. Navigate to and select the CSV file you downloaded.
4. Select **Delimited as Data Type** and click **Next**.
5. Select **Comma** as delimiter and click **Next**.
6. Select **Text** as column data format for all columns and click **Finish**. You can now edit the file.
7. Make the necessary changes and save the CSV into a .zip file. The file is ready for import.

> **Note:** The CSV file size must not exceed 10MB.

Import Assignments Objects and Rules Setup Data in a CSV File

To upload the new or modified assignment objects and rules setup data, follow these steps:

1. Select the appropriate task from the Tasks region. For example, to import Manage Sales Assignment Manager Objects, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Assignment Manager Objects
2. Select **Import from CSV file** from the Actions menu.

3. Select **Create New**.
4. Select the appropriate .zip file that you created. See the Preparing Assignment Objects and Rules Setup Data in a CSV File section. The application validates that the file corresponds to the selected task before you can submit the process.
5. Click **Submit**.
6. Select **Import from CSV file** to see the latest processes. Monitor the process until it completes.
7. Select the process once it completes to review the results. If any errors occur, review the details listed in **Status Details** in the **Business Objects** section. Fix the issues and import again, if necessary.
8. After you import the assignment manager objects setup data successfully, you can verify the loaded data by selecting the Manage Sales Assignment Manager Objects task from the Setup page.

See the chapter about importing and exporting setup data in the Using Functional Setup Manager guide for more details.

Related Topics

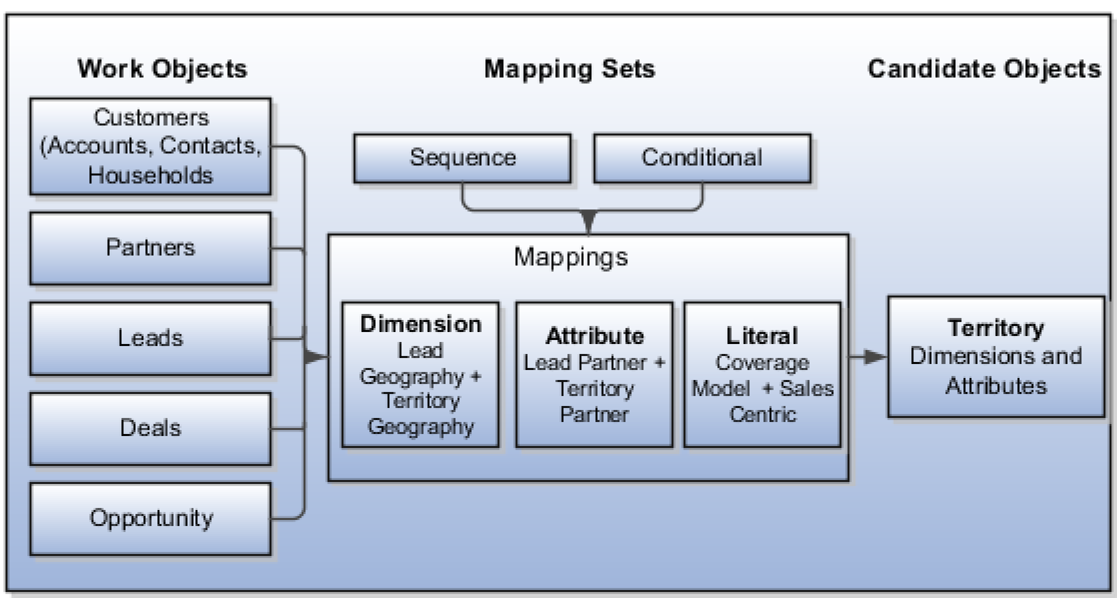
- Set Up an Offering with Scope
- Export and Import CSV File Packages

Assignment Mappings

Assignment Mapping Set Components

Assignment mapping sets and their underlying mappings drive territory-based assignment. This topic explains how these components work together in assignment processing.

This figure shows an example of the sales application work objects that have associated default mapping sets and mappings. Mapping sets and mappings drive territory-based assignment, and the work object attributes map to the territory candidate object dimensions and attributes.



Mappings

The mappings identify the dimensions, attributes, and territory filtering used in the assignment process. Default mapping sets and their related mappings are predefined for account, lead, partner account, deal, and opportunity revenue assignment. The predefined mapping example assumes that opportunities, leads, sales, partners, accounts, and deals use the same territory hierarchy.

Each predefined mapping set has between 9 and 16 mappings that identify the information about the object, such as the account industry or the sales lead product, and how each is mapped to a dimension or attribute on the territory.

You can create more mappings using the work objects, candidate objects, and attributes that you already established.

Mapping Sets

Mapping sets enable the grouping of mappings so that you can create more than one mapping for each combination of work object and candidate object. The mapping set concept is used only with territory-based assignment and territory-based assignment with rule filtering. Mappings sets are predefined for accounts, leads, opportunities, partner accounts, and deals. When managing assignment objects, the user can define more mapping sets, each of which contains multiple mappings, for each combination or work object and candidate object.

Mapping Types

There are three types of assignment mapping:

Dimension Mapping: Dimension mappings must be used when the work object and candidate object attributes in the comparison are dimension attributes, such as Product. When creating the mapping, use the Function Code field to specify a unique identifier for the dimension. Generally attribute mappings are used when the work object and candidate object attributes in the comparison are non-dimensional attributes.

> **Note:** The Geography dimension is deprecated. Use the Address dimension for geographical territories.

When creating the mapping, the Function Service and Function Code are only needed if a translations function is used. The function code field is used to specify a unique identifier for the attribute, and this identifier is passed to the translation function.

An example is assigning territories to opportunity revenue lines based on the product associated with the revenue line. In this case, dimension is selected as the mapping type. The candidate object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the territory. The work object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the revenue line.

Attribute Mapping: This mapping enables you to compare and match attribute values between a work object attribute and a candidate object attribute. When the value of the candidate object attribute matches the work object attribute, the candidate is selected. Attribute mappings are typically used when the work object and candidate object attributes in the comparison are non-dimensional attributes. This type of mapping is also used to capture the mapping between hierarchical dimensions account and geography.

For example, consider a lead work object with a Partner Identifier attribute and the territory object with Partner ID attribute. The selection criterion is: `select Sales Lead Territories where Sales Lead Territory.Partner Identifier equals Sales Lead.Lead Partner Identifier`. The assignment manager uses this mapping data to construct a query on the candidate object that's equal to the selection criteria.

Literal Mapping: Literal Mapping is used almost solely to filter the candidate objects. This form of mapping enables the comparison of candidate attributes against a specific value chosen by the user. The assignment manager compares the mapped candidate object attribute against the specified literal value. For example, select the Territory Candidate object that has the attribute Coverage Model that equals the value PARTNER_CENTRIC.

> **Note:** For Literal Mappings, ensure that the value entered corresponds to the Lookup Type Value code. Don't enter the meaning of the lookup.

Assignment Processing Using Mapping Sets and Mappings

When designing your mappings, carefully consider the dimensions and attributes you use in your territory structure and how you want to match these territory candidates to work objects. Also consider the shape of the information used in the territory structure; this might affect the sequence of each mapping. A sequence can be entered for each mapping set which is used to identify the order in which these mapping sets will be used in the territory-based assignment processing. The sequence of the dimension mappings used in territory matching can affect performance. The most selective mapping should be given the lowest sequence number. By using the lowest sequence number, it's performed earliest in the matching process, which results in the smallest number of territory matches. Mappings that don't have a sequence are used together at the end of the matching process.

> **Note:** The Geography dimension is deprecated. Use the Address dimension for geographical territories.

Sometimes the mapping set sequence doesn't matter. For example, there are two predefined opportunity revenue assignment mapping sets. When the first mapping set is used, it finds matching territories based on the information about the opportunity/opportunity account, and the territory information. Then the second mapping set is used which matches territories based on the opportunity/opportunity partner information and the territory information. The order of the mapping sets is interchangeable; regardless of which mapping set is used first, the resulting territories that match will be the same.

In the case of leads, the mapping set sequence is important as the territories matched using the first mapping set might result in a primary partner being added to the lead. This information is significant to the territory matching performed using the second mapping set.

Mapping sets can be made conditional to control whether the mapping set is used or not used during assignment processing. For example, the partner channel manager territory assignment mapping set conditional attribute is set to the value **RevenuePartnerId**. During the assignment processing of a revenue line, if the **RevenuePartnerId** attribute for that revenue line contains a value, then this mapping set will be used in territory matching processing.

An indicator in the Related Candidates region controls whether to merge the matching assignment candidates identified from processing each set of mappings. This indicator is used to drive the merging of matching candidates when multiple mapping sets are used in assignment processing. If the box is checked, then the candidates are merged. Candidates aren't merged by default.

In most implementations, the predefined mapping sets are enough. But mapping sets can offer some flexibility if user-defined assignment processing is needed.

Examples of Creating Assignment Mappings

For territory-based assignment, you must create work object to candidate object mappings while creating the assignment object. These mappings are used to make candidate assignments. The scenarios in this topic illustrate creating the different mapping types:

- Attribute mapping

- Dimension mapping
- Literal mapping

Create an Attribute Mapping

You want to assign territories to an opportunity revenue line when the territory line of business is the same as the opportunity line of business. Here's how to create an attribute mapping:

1. Create the following mapping:
    - Work object - Revenue
    - Candidate object - Territory
2. Select the territory when the attribute territory line of business code is equal to the revenue line of business.
3. Enter a value for the sequence which determines the order in which the mapping is used when matching territories.

    > **Note:** Assign the lowest sequence number to the most selective mapping, and the next sequence number to the next most selective mapping.

Create a Dimension Mapping

You want to assign territories to opportunity revenue lines based on the product associated with the revenue line. Here's how to create a dimension mapping:

1. Select the mapping type **Dimension** and enter a sequence value, which determines the order in which the mapping is used when matching territories. The most selective dimension mapping should be given the lowest sequence number.
2. Enter the function `getDimMemberSequence` and the Service `oracle.apps.sales.territoryMgmt.territories.publicModel.util.ConsumableComponentsUtil`.
3. Enter the value `Prod` for the function code.
4. Select the candidate object **Territory**, the work object **Revenue**, and the alternate work object **Revenue**.
5. Select the candidate object low and high attributes.

    The candidate object low and high attributes correspond to the names of the low sequence and high sequence attributes for product on the territory. For example, Dimension Sequence Low and Dimension Sequence High respectively.
6. Select the work object low and high attributes.

    The work object low and high attributes correspond to the names of the attributes for product on the revenue line. For example, Inventory Item ID and Inventory Organization ID respectively.

    When assigning territories to opportunity revenue lines based on the product, a revenue line may be for a product group instead of a product. In this case, the work object alternate low and high attributes can be used. For example, alternate work object low attribute would be set to Product Group.

    If the revenue line doesn't contain either a product or product group, the low and high default values for the product dimension mapping can be used to match against the product dimension with the value **Any**. In this example, the default value low would be set to 1 and default value high to 999999999999999.

Create a Literal Mapping

Literal mappings are a way of filtering the matched territories based on specific values of a territory attribute. You want to find only territories that have an account-centric coverage model assigned to each revenue line. For example, territory coverage model equals SALES_ACCOUNT_CENTRIC.

> **Note:** Literal mappings use the code value for lookup-based fields, and not the meaning value.

Here's how to create the literal mapping:

1. Select the mapping type **Literal** and optionally enter a sequence value, which determines the order in which the mapping is used when matching territories.
2. Select the candidate object **Territory**.
3. Select the candidate object attribute that will be used for filtering. For example, Coverage Model.
4. Select the operator value **Equals**.
5. Select the literal value. In this example, only sales account-centric territories should be assigned to revenue lines, so the Literal Value entered corresponds to the code value for the coverage model. For example, SALES_ACCOUNT_CENTRIC.

Related Topics

- What types of assignment rules can I create?

Assignment Rules

Assignment Rule Components

The rule category, rule sets, and rules are components that work together to determine how the assignment engine processes rule-based assignments for work objects.

Rule categories are predefined for each object leveraging assignment rules. Each predefined rule category determines the type of rule processing performed, for example, matching, scoring, and classification.

Depending on the rule category selected, rule sets may allow filters to be used to determine whether all matches are assigned, or a random number of matches. Additionally, a score may be used to allow further filtering of the matching candidates, such as the top X candidates or all above or equal to a minimum score.

At the rule level within a rule set, the action determines what happens when a rule is evaluated as true. The rule action option works in conjunction with the rule category selected.

Here's how the rule set components work together.

Mode	Use Score	Filters	Action
Matching or Territory Applicable only if you use territory-based assignment with rule filtering.	X	All All Above Minimum Score (set Minimum Score value)	Increase Score By x for each matching or selected candidate

Mode	Use Score	Filters	Action
		Random (set Number of Candidates value) Top X (set Number of Candidates value)	
Matching or Territory Applicable only if you use territory-based assignment with rule filtering.	Not applicable	All Random (set Number of Candidates value)	Assigns the matching or selected candidates.
Scoring	Not applicable	Not applicable	Increase Score By x
Classification	Not applicable	Not applicable	Set Value To x

Rule Category and Rule Set

The rule category selected for the rule set determines the type of rule-based assignment processing to be performed. For example, if you select the rule category named Sales Lead Resource Rule Category, the candidates that match the conditions of the rules evaluated as true by the assignment manager are assigned to the work object. The number of matching candidates that are assigned to the work object is determined by the rule set filter settings. Only one rule category can be associated with each rule set.

A rule category is predefined for each type of rule-based assignment processing supported by each sales application object. For example, the rule category named **Sales Team Member Recommendation Default Rule Category** is predefined for resource rule-based assignment of Opportunities, and **Sales Lead Resource Rule Category** is predefined for resource rule-based assignment of Leads. Similar rule categories can be predefined for territory rule filtering for revenue lines, territory rule filtering for leads, lead scoring, lead raking, and lead qualification.

Rule categories are created and edited through the Manage Assignment Objects setup task for the relevant application. A rule set contains rules that belong to a specific rule category.

Use Score

The **Use Score** option determines whether a score is used when identifying matching candidates. The number of matching candidates that are assigned to the work object is also determined by the rule set filter settings.

Filter Settings

The filter settings are used in conjunction with some rule categories and the rule set **Use Score** option. The filters allow you to indicate how many matching candidates you want to assign to the work object. When set to **All Above Minimum Score**, all of the matching candidates above a particular score are assigned to the work object. Set the score in the **Minimum Score** field.

When set to **Top X**, a number of matching candidates with the highest scores are assigned to the work object. Use the **Number of Candidates** field to specify how many top matching candidates to assign.

When the filter is set to **Random**, a random selection of matching candidates is assigned to the work object. When the rule set **Use Score** option is selected, and the filter is set to **Random**, a random selection of matching candidates with the highest scores is assigned to the work object. Use the **Number of Candidates** field to specify how many random matching candidates to assign.

Rules

One or more rules may be defined for each rule set. Each rule is the distinct set of criteria that's evaluated and candidates or scores that are eligible to assign if the conditions are met. The rule action may apply if all conditions are met, or any conditions are met.

> **Note:** You may have resolved duplicate account or contact records to ensure that clean data is available by merging duplicated records into one single record. During the merge process, some account and contact attributes are removed to resolve the duplication. This may impact your account assignment rules where the rule conditions apply to any of the AccountId or ContactId attributes that got deleted during the merge process.

The assignment rule administration allows more than one user at a time to create or update rules that belong to the same or different rule sets or categories. For example, if User A is currently updating assignment rules for the **Sales Lead Resource Rule Category** rule category, then User B can update assignment rules for that same rule category or another rule category at the same time.

> **Note:** If you want to rename, delete, or create a rule with the same name as an existing rule, you must click Publish after you make your changes to the existing rule. Only then should you create another rule with the same name to ensure that your changes are live and included in the assignment processing.

Action

The action set at the rule level determines the action that's performed when a rule is evaluated as true.

If defining rules to assign resources to an object, you can search for and select the specific resources to be assigned when the rule conditions are evaluated as true.

When a matching rule category is selected, for example, Sales Lead Resource Rule Category, the rule action assigns the matching candidates. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule are assigned. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or a random number of matching candidates are assigned (Random).

When a matching rule category and the **Use Score** option are selected, the rule action increases the candidate score by the specified value. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule get the value in the **Action** added to their score. For example, you select Sales Team Member Recommendation Default rule category and the **Action** for one of the rules in that set is **Increase Score By 10**. If that rule is evaluated as true, the resources that match the conditions for that rule get 10 added to their scores. The scores are cumulative, so if any of the resources that matched the conditions in the rule in the example also match the conditions for other true rules in the set, those resources get additional values added to their current score of 10. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or all matching candidates above a specified score are assigned (All Above Minimum Score), or a random selection of matching candidates with the highest scores are assigned (Random), or a number of matching candidates with the highest scores are assigned (Top X).

When a classification rule category is selected, the rule action is **Set Value To** `Value Name`. For example, the rule category is **Sales Lead Rule Qualification Rule Category**, the action for one of the rules in that set is **Set Value to Qualified**. If that rule is evaluated as true, the **Status** for the lead being classified is set to **Qualified**.

When the rule category **Sales Lead Scoring Rule Category** is selected, the rule action is **Increase Score By** `Score Value`. If a rule with that action is evaluated as true, the value in the action is added to the score of the work object associated with the rule set. For example, if the action for one of the rules in that set is **Increase Score By 20**, and that rule is evaluated as true, the score for the Lead is increased by 20.

> **Note:** When you're creating or updating assignment rules, you must click **Save and Publish** to ensure that your changes are live and included in the assignment processing.

Related Topics

- What types of assignment rules can I create?

What types of assignment rules can I create?

Assignment rules are created using rule sets, rules, conditions, and actions. The assignment process uses your rules to evaluate and recommend candidate assignments for specified work objects. This topic provides scenarios to illustrate the different types of rules you can create.

> **Note:** When creating an assignment rule that uses a checkbox field, note that the value of true might be denoted by "Y" or "Yes" or "T". Ensure the checkbox is clear to denote a false value.

Create Lead Qualification Rules

In this scenario, you want to create rules to classify leads as qualified if these attributes are set as specified:

- Lead Customer is sales account.
- Lead Product is set to Is Not Blank.
- Lead Score is greater than 150.

To create a rule to classify leads as qualified:

1. In the Setup and Maintenance work area, go to:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Assignment Rules
2. Search for and navigate to the assignment configuration setup task for the relevant object:
    - For sales lead and deal assignment, go to the Manage Sales Lead Assignment Rules task. This is the task used as an example in this topic.
    - For the Opportunity functional area assignment, select the Manage Opportunity Assignment Manager Rules task.
3. In the setup task page, select the category for the appropriate assignment flow, in this case **Sales Lead Qualification Rule Category**.
4. Click the **Add Row** icon to create a rule set for the predefined rule category Sales Lead Qualification Rule Category.

5. Create a rule with the three conditions that match the attribute settings for a lead to be considered a qualified lead:
    - Lead Product: Select the lead attribute **Primary Product ID**. Select the **Is Not Blank** operator.
    - Lead Customer: Select the lead attribute **Sales Account Indicator**, and then select the **Equals** operator. Enter the value of `Y`.
    - Lead Score: Select the lead attribute **Score**, and then select the **Greater Than** operator. Enter the value of `150`.
6. In the Actions region, select **Qualified** from the **Return the Candidate Value As Qualified** list.

Create Lead Scoring Rules

In this scenario, you want to create a scoring rule to:

- Increase lead scores by 150 if the lead attribute Lead Time Frame is set to 3 months.
- Increase lead scores by 100 if these attributes for leads are set as specified:
    - Budget Status is Approved
    - Budget Amount is greater than 500000

To create this scoring rule:

1. Create a rule set for the predefined rule category Sales Lead Scoring Rule Category.
2. Create the first rule with the conditions that match the attribute settings you want a lead to have so that 150 is added to its score:
    - Choose the object **Sales Lead** and attribute **Time Frame**, and then select the **Equals** operator. Select **3 months**.
    - Enter the action as `Increase the Score by 150`.
3. Similarly, create your remaining rule for the budget attributes and action to **Increase the Score by 100**.
    a. Add the first condition: Choose the object **Sales Lead** and attribute **Budget Status**, and then select the **Equals** operator. Select **Approved**.
    b. Add the second condition: Choose the object **Sales Lead** and attribute **Budget Amount**, and then select the **Greater Than** operator. Enter `500000`.
    c. Enter the action as `Increase the Score by 100`.

Create Matching Candidate with Scoring Rules

Assign different country specialists to opportunities in some European countries based on the country and the risk level of the Opportunity. To create matching candidate with scoring rules:

1. Create a rule set for the predefined category Sales Lead Resource Rule Category and select the **Use Score** option, the filter type of **All Above Minimum Score**, and the minimum score set to **20**.
2. Create three rules each with conditions:
    a. Create the first rule with these conditions:
        - Select the object **Opportunity**, and then choose the attribute **Customer Country**. Select the **Equals** operator, and then select `DE`.
        - In the rule action, set **Increase Score By** to **20**.
        - Select and add the appropriate resource.

b. Create the second rule with these conditions:

   - Select the object as **Opportunity**, and then choose the attribute name **Customer Country**. Select the **In operator**, and then select `FR` and `UK` as condition values.
   - In the rule action, set **Increase Score By** to **20**.
   - Select and add the appropriate resource.

c. Create the third rule with these conditions:

   - Select the object **Opportunity**, choose the attribute name **Risk Level**. Select the **Equals** operator, and then select the value **High**.
   - In the rule action, set **Increase Score By** to **20**.
   - Select and add the appropriate resource.

Related Topics

- How do I update existing setup data?

Example of Using Territory-Based Assignment with Rule-Based Filtering

This topic illustrates using territory-based assignment with rule-based filtering. In this example, you find one or more matching territories and use assignment rules to filter the list of territories assigned to sales leads.

Scenario

Your company wants to assign new leads to the correct territory. If there is no sales channel identified on an incoming lead, then the application should determine if the lead should go to a partner or remain internal. If the deal is internal, then only the prime territories are assigned. If the deal is pushed to a partner, then a channel manager is also assigned to oversee the deal.

Transaction Details

Leads are the primary marketing business objects that the assignment engine processes. Territory assignment is the primary means of assigning the appropriate salespeople to the lead. Rule filtering may also be used to filter the territories, for example when the sales channel isn't identified. The rule filtering is performed when the Assignment Rule for Territory-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_RULE) profile option is set to use rule filtering.

In this scenario, the work object is Lead and the candidate object is Territory. The assignment is territory-based. The assignment processing finds one or more matching territories. Assignment processing then uses the rule category defined in the Assignment Rule for Territory-Based Lead Assignment profile option to determine the set of rules to use for the rule filtering.

After the territory-based assignment delivers a list of territories, the rules can fine-tune the assignment process:

1. Rule for SALES CHANNEL Is not blank

   a. SalesLead.Sales Channel Is not blank
   b. Action: Return matching candidates

2. Rule for SALES CHANNEL Is blank, Assign Channel Manager

    a. Sales Lead.Sales Channel Is blank
    b. Sales Deal.Deal Size Greater than 1,000,000
    c. Territory.Territory Type In Partner, Sales Channel Manager
    d. Action: Return matching candidates

3. Rule for SALES CHANNEL Is blank, Assign Prime

    a. Sales Lead.Sales Channel Is blank
    b. Sales Deal.Deal Size Lesser than 1,000,000
    c. Territory.Territory Type Equals Prime
    d. Action: Return matching candidates

When the lead comes in, it must be assigned to a territory for follow-up. Based on the SALES CHANNEL rules, territory-based assignment can determine if the lead is a smaller deal that can be handled by your partners (and a Sales Channel Manager to oversee), or whether it's a larger deal that must be followed up by the internal sales force.

Assignment Results

The assignment process first identifies the list of territories for the lead. The rules then determine who gets the deal:

1. This first rule determines if a Sales Channel value exists. If it does, then all territories identified (by way of territory-based assignment) are assigned.
2. The second rule says if there is no sales channel assigned, and the deal is under one million dollars, assign the lead to a partner and a Sales Channel Manager.
3. The final rule is used when there is no sales channel value, and the deal is greater than one million dollars, the lead is assigned to the prime (internal) territories.

Assignment Using Access Groups

Overview of Access Groups

Use access groups to provide sales resources with additional access to sales object data. Access groups are an alternative way of granting data permissions to users, and they use a different access path provided by the predefined data security policies.

An access group uses the access control list model. You create an access group and assign users to it. All group members are given access to standard or custom object data. You define object sharing rules that provide users with access to the specific records of an object. These rules specify the type of access to be provided and the conditions under which the access is provided. For example, users might be granted access to:

- All opportunities with a status of Open
- All accounts where country is set to UK

You can also define the type of data access provided, for example, Full access or Read access.

A user can be assigned to one or more access groups. In this case, the user has the access assigned to each group. So if Lisa Jones is assigned to Access Group A, which provides access to opportunities, and to Access Group B, which provides access to Accounts, she receives the access provided by both groups. You can also use one access group to assign access to multiple objects.

For more information about access groups, see the Access Groups chapter in the *Securing CX Sales and Fusion Service* guide.

Related Topics

Assignment with User-Defined Objects

User-Defined Assignment Features

Assignment processes assign salespeople and their territories to core sales objects, such as opportunities and leads, using territory dimensions or assignment rules.

You can configure user-defined assignment flows to assign user-defined objects or to perform additional or alternate assignment processing on standard objects.

> **Note:** In the context of assignment, "user-defined" objects are those objects you create using the configuration tool, Application Composer.

User-Defined Assignment Key Features

User-defined assignment lets you:

- Assign the appropriate resource or group quickly and efficiently using assignment rules.
- Use a simple approach to define the criteria that matches rule values with resources or territories.
- Assign territories to user-defined objects with assignment rules.
- Define rules that match fields on business objects with fields on territories and resource objects. Or, define rules where fields contain specific values. These fields and business objects can be both user-defined and standard.
- Define assignment rules to calculate a score for an object or set the value of a specific field if certain conditions are met.
- Automatically assign new records.
- Run assignment processes from within the applications.
- Use the Perform Assignments batch assignment process to assign user-defined object records in bulk.

> **Note:** If you make user-defined assignment workflow or trigger configuration changes in a sandbox, you must publish the sandbox for your changes to take effect. This is expected behavior, since the assignment job is executed by an internal user. See the topic, *How to Publish Assignment Information*, for details.

User-Defined Territory Assignment Considerations

If you use user-defined assignment flows to assign territories to user-defined objects, consider these points:

- You can assign territories to user-defined objects using rule-based assignment. Territory-based assignment isn't supported.
- You can't use territory coverage, such as geography or product, in the assignment processing of territories to a user-defined object. Instead, you must use the standard fields on a territory, such as name, number, or owner, along with any user-defined fields. Assignment processing uses the standard fields on a territory, in addition to using the standard and user-defined fields on the user-defined object.
- Oracle recommends that you use the Territories feature to create and maintain territories, so that the latest active territory details are available.

Related Topics

- User-Defined Assignment Features

Publish Assignment Changes

How to Publish Assignment Information

Assignment processing uses only published assignment configurations and rules. Therefore, any time you change assignment configurations or rules, you must publish the changes.

For example, if you add a new sales lead assignment rule but don't publish the changes, then the next time assignment processing occurs, the assignment processing will skip the new rule.

You publish assignment information in the following ways:

- Publish from an application's assignment setup pages in Setup and Maintenance. For example, publish in the Manage Sales Lead Assignment Rules page or the Manage Sales Assignment Manager Objects page.
- Run the scheduled process Perform Assignment Data Publish, Refresh, and Synchronization.

Oracle recommends that you publish assignment information when you:

- Update the assignment configuration, which includes assignment objects, attributes, and mappings.
- Create or update assignment rules where the changes are infrequent or there is only a small number of assignment rules.
- Create user-defined objects or fields that you're going to use in assignment.

Publish Data Using the Assignment Setup Pages

You can publish assignment data from any of the assignment objects and assignment rules setup pages, such as Manage Customer Center Assignment Objects or Manage Sales Lead Assignment Rules.

After you create or update assignment data or rules, in the applicable setup page, click **Save and Publish** to publish assignment information and make it available for use in assignment processing. Clicking the save and publish button submits the process that publishes assignment configuration and rules information. To monitor the status of the publish process, click the refresh icon next to the Last Published text in the page.

If you make updates to assignment data or rules and don't publish, a warning icon appears next to the Last Published text. If the publish process fails, the warning icon remains next to this text.

Publish Data Using the Publish Assignment Information Process

You can run the Perform Assignment Data Publish, Refresh, and Synchronization scheduled process to publish assignment information. You can schedule this process daily, weekly, and so on, based on the frequency of changes to assignment information, including assignment rules. Consider how often the assignment data will change and how critical it's to have these changes available for use in assignment.

You can use the publish assignment information process when there are a large number of assignment rules (about 100 to 1000) and when there are multiple users making changes to rules at the same time.

To run this process:

1. Click **Navigator** > **Scheduled Processes**.
2. Click the **Schedule New Process** button.
3. On the Schedule New Process window, select **Perform Assignment Data Publish, Refresh, and Synchronization** process from the **Name** list, and click **OK**.
4. On the Process Details page, select the application from the **Application** list.
5. Select the **Publish** check box.

   > **Note:** The **Candidate Object** and **Owner Module** fields don't apply to this process.

6. Click **Submit**.

This process publishes all assignment information for the selected application so that it's available for use in assignment processing. You can use the Scheduled Processes page to monitor this process and to view the log file.

Related Topics

- How You Refresh Assignment Candidate Cache

Account Assignment

Overview of Account Assignment

An account represents a company or person you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to.

Assignment manager lets you assign territories related to your sales accounts, including customers, prospective customers, individual contacts, and households. You can use assignment rules defined for accounts only to filter the territories that are assigned to accounts.

Predefined business events, such as Organization Created or Organization Updated, may impact the performance of account assignment processes if the profile option that controls those business events is enabled. For more information, see the topic How You Monitor Your Import Activities, in the Oracle CX Understanding Import and Export Management for CX Sales and Fusion Service guide.

Multiple Classification Types

Enable Multiple Classification Types

You can enable multiple organization types and industries classification types for account assignment. While you can specify multiple industries for each account, the application only uses only the primary industry for assignment. Use this procedure to enable assignment on all of the industries.

For example, Oracle Corp. is primarily a software supplier, but also manufactures hardware. After you complete the setup, you can assign the account using both industry categories.

Assignments are run on an account based on classifications and includes these tasks.

- Using multiple organization types for account assignment.
- Using multiple industries classification for account assignment.
- Running assignment manager on an account.

> **Note:** Before you start these procedures, you must ensure that the **Organization Types** and **Industries** fields are shown on the Profile tab of the Accounts page.

Use Multiple Organization Types for Account Assignment

1. Go to the Setup and Maintenance work area.
2. Search for the **Manage Customer Center Assignment** task.
3. Select the **Account** row.
4. Select the **Candidates** tab of the **Account: Details** table and then the **Account Territory** row.

   This row contains mapping information about the account.
5. Select the **Account Territory: Mapping Sets** tab.

   This tab shows the organization type and industries type.
6. Select the row corresponding to **Organization Type** in the Work Object Attribute Low column and click **Edit**.

   The Edit Mapping Page opens where you can edit the organization mapping to update the work object.

   Use default values for fields unless the steps specify other values.

Field	Value
Work Object	Account Organization Type
Work Object Attribute: Low	Code Assignment

7. Ensure that the Inactive check box is clear, so that the mapping remains active.
8. Click **OK** to save the changes.
9. Verify that your updates are active by reviewing the Mapping Sets tables.

The values of the specific dimension that you have enabled using the multiple values for assignment, instead of the primary value, should be **Code Assignment**.

10. Click **Save and Publish**.

    Your changes are published and future territory assignment for accounts is performed using the mapping sets.

Use Multiple Industries Classification for Account Assignment

1. Select the row corresponding to **Industry** in the Work Object Attribute Low column and click **Edit**.

   The Edit Mapping page opens where you can edit the industry mapping to update the work object.

   Use default values for fields unless the steps specify other values.

Field	Value
Work Object	Account Industry
Work Object Attribute: Low	Code Assignment

2. Ensure that the Inactive check box is clear, so that the mapping remains active.
3. Click **OK** to save the changes.
4. Verify that your updates are active by reviewing the Mapping Sets tables.

   The values of the specific dimension that you have enabled using the multiple values for assignment, instead of the primary value, should be **Code Assignment**.
5. Click **Save and Publish**.

   Your changes are published and future territory assignment for accounts is performed using the mapping sets.

Run Assignment Manager on an Account

1. Go to the Accounts list page.
2. Search for the Maple Networks account for which you want to run the assignments based on the mappings.
3. Select the row corresponding to Maple Networks.

   You are in the Edit Accounts: Maple Networks page.
4. Go to the Profile tab.
5. Click **Industries**.

   You are in the Manage Industries page.
6. Click **Add**.
7. Enter Financial Services in the Name field and click **Search**.
8. Select the row corresponding to the Financial Services industry.
9. Click **OK** on the Select: Industry page, and then again on the Manage Industries page.
10. Click **Save** on the Edit Account page.

    Saving your changes automatically triggers the assignment process and the account is assigned territories based on the mapping sets.

Territory-Based Account Assignment

Overview of Territory Account Assignment

Territory-based assignment is the default approach used to give sales people and their managers access to account, contacts and households.

Account assignment is based on the matching of sales account attributes with sales territory dimensions. For example, you can add an account owner to the account-territory matching to enable the assignment of a territory based on the account owner.

By default accounts are assigned automatically when the account is created or updated. Alternatively, sales people with access to the account team can run assignment for a specific account. Additionally, account assignment can run in bulk on a scheduled basis. You can also add an account owner to the account territory mapping that enables the application to assign a territory based on the account owner's territory. For example, if the account owner is mapped to the territory owner, then when you create an account, you're made the account owner

Multiple Industry and Organization Classifications

Opportunity and Lead assignment also supports multiple classification values. For more information on assigning opportunities and leads using industry classification codes, see the white paper, Assignments Using Nonprimary Classifications (Doc ID 2086014.1) available on My Oracle Support.

Sales Account Assignment Child Objects

Here's a list of sales account assignment child objects:

Sales Account Assignment - Child Objects	Description
Account	Represents a company you sell to An account represents a company you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to.
Account Auxiliary Classification 1	Multiple auxiliary classification codes associated with the account Select this child object to enable account assignment by all account auxiliary classification 1 values.
Account Auxiliary Classification 2	Multiple auxiliary classification codes associated with the account Select this child object to enable account assignment by all account auxiliary classification 2 values.
Account Auxiliary Classification 3	Multiple auxiliary classification codes associated with the account Select this child object to enable account assignment by all account auxiliary classification 3 values.
Account Industry	Multiple industries associated with the account Select this child object to enable account assignment by all account industry types.

Sales Account Assignment - Child Objects	Description
Account Organization Type	Organization type classification code assigned to the account Select this child object to enable account assignment by all account organization types.

Sales Account Assignment Object Attributes and Corresponding Customer Attributes

Here's a list of sales account assignment object attributes and corresponding customer attributes, as shown on the Profile and Classification nodes of the respective information tree.

Sales Account Assignment Object Attribute	Corresponding Sales Attribute
Geography Identifier	Sell-to Address
Industry	Primary Industry: The primary classification code for the classification category defined in profile option Industry Classification Category.
Organization Type	Primary Organization Type: The primary classification code for the classification category Organization Type defined in profile option Industry Classification Category.
Organization Size	Organization Size
Named Account Type	Named Sales Account Indicator
Party ID	Party ID
Auxiliary Dimension 1	The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 1.
Auxiliary Dimension 2	The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 2.
Auxiliary Dimension 3	The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 3.

Related Topics

- Considerations for Configuring Assignment
- Examples of Creating Assignment Mappings
- Overview of Accounts, Contacts, and Households

Assign Primary and Nonprimary Classifications

As a sales administrator, you have the ability to configure account assignment to enable primary and nonprimary industry codes, organization types, and classification values.

Enabling Organization Type and Industry Classification Values

To enable the organization type and industry classification values:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Customer Center Assignment Object
3. Click the **Manage Customer Center Assignment Object** link.

    The Manage Customer Center Assignment Object page appears.
4. Select the **Account** object.
5. In the Account: Details region, select the **Candidates** tab and then select **Account Territory**.
6. Select the **Account Territory: Mapping Sets** tab.
7. In the Mappings region, select the work project.
8. Click **Edit**.

    The Edit Mapping pane appears.
9. Make the required changes and click **OK**.
10. Click **Save and Publish** to activate the mapping to enable assignment by all classification values.

Improve the Performance for Territory-Based Account Assignment

Assignment manager lets you assign territories related to your sales accounts, including customers, prospective customers, individual contacts, and households. To optimize the performance of assigning sales representatives to these sales territories, you can choose to select an enhanced mode of processing for territory-based account assignment.

This performance enhancement is specific to territory-based account assignment only. There's no performance impact on other business objects such as Leads, Opportunity, Partner, or any rule-based assignment activities.

If you have permission to configure offerings, then you can use the New Features page to opt in to these two features:

- Optimize Performance for Territory Based Assignment
- Optimize Performance in Accounts, Contacts, and Households

1. Select the **Change Feature Opt In** from the **Sales Foundation** functional area and open the **Edit Features: Sales Foundation** page.
2. Locate the **Optimize Performance in Territory-Based Assignment** feature and expand to display the **Optimize Performance in Accounts, Contacts, and Households**.
3. Select the **Enable** check box for both of these features and click Done.

For more information, see the New Feature Opt-In section of the Oracle Applications Cloud - Using Functional Setup Manager guide on the Oracle Help Center (docs.oracle.com). When you run your next Territory-Based Account Assignment, note the significant performance improvements after using the enhanced mode of processing.

Note: While the performance for territory-based account assignment is enhanced by enabling this Opt-In feature, custom post-processing tasks may be impacted. For example, any custom task flows, Groovy scripts, or event notifications won't get triggered.

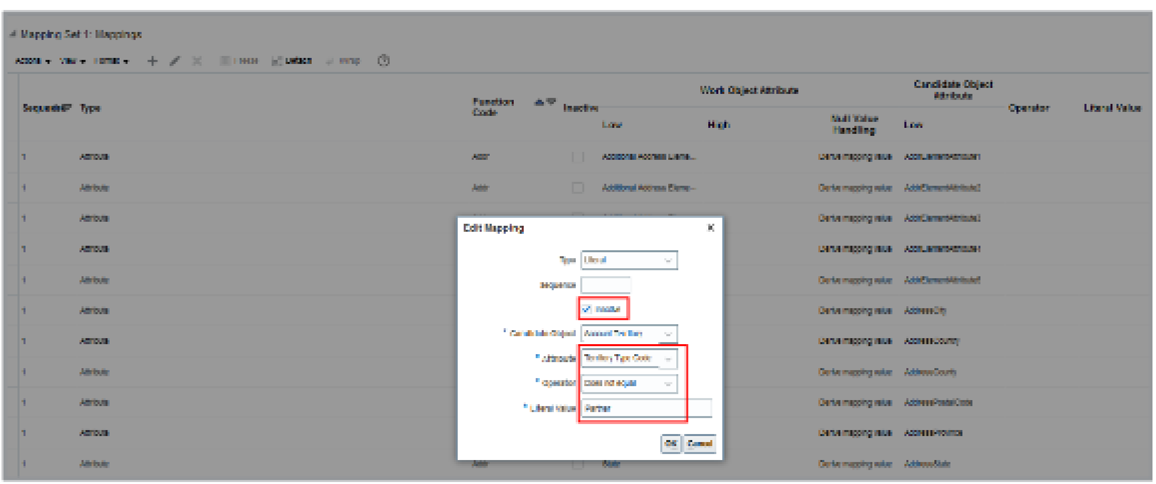
Modify Sales Account Assignment to Assign Partner Type Territories

As a sales administrator, you can configure account assignment to assign partner type territories.

To assign partner type territories for account assignment, you must deactivate the **Territory Type Code** attribute as follows:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Customer Center Assignment Object
3. Click the **Manage Customer Center Assignment Object** link.

    The Manage Customer Center Assignment Object page appears.
4. Select the **Account** object.
5. In the Account: Details region, select the **Candidates** tab and then select **Account Territory**.
6. Select the **Account Territory: Mapping Sets** tab.
7. Select the row corresponding to **Territory Type Code** in the Candidate Object Attribute Low column and click **Edit**. The Edit Mapping Page opens where you can edit the Territory Type Code mapping to update the candidate object.



8. Ensure that the **Inactive** check box is selected, so that the mapping isn't active.
9. Click **OK**.
10. Click **Save and Publish** to deactivate the mapping.

Overview of Account Assignment Profile Options

The following profile options influence the behavior of sales account assignment:

Profile Option Display Name	Default Value	Effect
Assignment Rule for Account Territory Assignment	Null	Specifies the assignment rule that defines the sales territory that's assigned to an account.
Account Types Enabled for Assignment	ZCA_CUSTOMER	Enables one or more account types for territory assignment. Applicable types are Account Type standard lookup values. Use comma-delimited string for multiple values.
Sales Account Automatic Assignment on Import Enabled	N	Enables automatic territory based assignment after sales accounts are imported. If disabled, manually run a batch assignment or assign each sales account individually.
Disable updating Last Assign Date when there are no territory changes	N	Disables Stamping of Last Assign Date when there are no territory changes.
Sales Account Automatic Assignment on Create Enabled	Y	Enables automatic territory based assignment processing after a sales account is created.
Sales Account Automatic Assignment on Update Enabled	Y	Enables automatic territory based assignment processing after a sales account is updated.

Account Territory Member Access

Access for the territory owners and members are the same as that of the team members.

These access levels control the internal and partner territory privileges for the account:

- Internal territory owner: Full access
- Internal territory members (nonowner): Edit access
- Partner territory owner and members: View-only access

Note: You must implement Territory Management before you can access territory owners.

Related Topics

Account Assignment Scheduled Processes

Schedule Account Assignment

The Request Account Assignments scheduled process can be scheduled and run on the Scheduled Processes page. You must have the Run Sales Party Batch Assignment privilege to define and run account batch assignment.

To access the Scheduled Processes page, click **Navigator**. In the **Tools** heading, click **Scheduled Processes**.

1. Click **Schedule New Process**, then click type **Job**.
2. Select the process named **Request Account Assignment**. If needed, use the Search link on the Search window.
3. Enter your process details. The following table shows the view criteria and its description, as well as any bind values that are required.

    - **Work Object**: SalesAccount_Work_Object
    - **Candidate Object**: SalesAccountTerritory_Candidate_Object
    - **Assignment Mode**: Territory
    - **View Criteria Name**: (as shown in the following table)
    - **View Criteria Bind Values**: (as shown in this table)

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
SalesAccountsUpdatedSinceVC	Use this view criteria to assign accounts which haven't been previously assigned and have LAST_UPDATED_DATE is greater than or equals the specified date and (LAST ASSIGNED DATE is empty or LAST ASSIGNED DATE is less than or equal to the specified date.	BindLastUpdateDate= [YYYY-MM-DD HH:MM:SS]	Daily
SalesAccountsAssignedBeforeVC	Use this view criteria to reassign accounts which have been previously assigned and have `LAST_ASSIGNED_DATE` (in the `ZCA_SALES_ACCOUNTS` table) less than the specified date.	BindLastAssignedDate= [YYYY-MM-DD]	Daily
SalesAccountTerritoryBatchReass	Use this view criteria to reassign accounts impacted by the specified territory and territory dimensional realignment batch. This view criteria is also used internally to initiate immediate/ automatic assignments after territory proposal activation and territory dimension updates.	BindReassignment BatchId=[Territory Reassignment Batch ID]	Ad hoc run as per business requirements
SalesAccountBulkImportVC	Use this view criteria to assign accounts created in a given customer import batch.	BindReassignment BatchId=[Import Activity ID]	Ad hoc run as per business requirements

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
	This view criteria is also used internally to initiate immediate/ automatic assignments after customer import.		
SalesAccountDimsForPartyVC	Use this view criteria to assign the account with the specified account ID.	BindPartyId= [Sales Account ID]	Ad hoc run as per business requirements

4. Define a schedule as needed using the **Advanced** button on the Process Details page. You can schedule the process to run as soon as possible, or to run at a given frequency and start date.
5. Submit your job and monitor it using the Scheduled Processes list, refreshing it to view the latest status updates.

Related Topics

- Examples of Creating Assignment Mappings
- How You Refresh Assignment Candidate Cache
- How can I add territories to an account?
- When are territories assigned to accounts?

Opportunity Assignment

About Sales Resources and Opportunity Assignment

Sales resources (team members) are assigned to an opportunity either automatically by the assignment process, or when you add them to the sales team while editing an opportunity.

The following sections discuss different ways to assign sales resources to an opportunity.

Scheduled Processing

The preferred way to assign sales resources to an opportunity is using a scheduled process, also known as a batch process or batch method. There are two predefined scheduled processes for opportunity assignment as follows:

- **Request Revenue Territory Assignment**: Use this process to run territory-based assignment on opportunity product lines. During this process, the application evaluates every product line in the opportunity batch. Territories whose dimensions match the dimensional attributes of a given product line are then assigned to that line.
- **Request Opportunity Resource Assignment:** Use this process to run rule-based assignment on opportunities. During this process, assignment processing executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for opportunities. If matching candidates are

found, they're added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

CAUTION: These scheduled processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues. The scheduling service checks for such incompatibilities prior to initiating the assignment process.

Manually Assigning and Re-assigning

Users with Full access to an opportunity can manually assign or re-assign sales team members, including the opportunity owner. If an opportunity is re-assigned to a new owner manually, the original owner stays on the sales team as a non-primary team member, unless he's manually removed from the team.

Real Time Assignment Processing Action

From within an opportunity, salespeople can use the assign opportunity action to run assignment processing to automatically assign, in real time, resources to the opportunity. Based on the setting of the profile option, Opportunity Assignment Mode, assignment processing uses territory-based assignment, rule-based assignment, or both.

Automatic Assignment On Saving an Opportunity

If the profile option, Assignment Submission at Save Enabled, is set to Yes, when you save an opportunity, assignment processing runs assignment on the opportunity. In a similar way that on-demand assignment happens, assignment processing uses territory-based assignment, rule-based assignment, or both, based on the profile option, Opportunity Assignment Mode.

Related Topics

- What's lock assignment?
- Opportunity Team Profile Options
- Recommendations for Assignment Processes for Opportunities
- Overview of Territory Account Assignment

Territory-Based Opportunity Assignment

Set Opportunity Assignment Profile Options

Whether you're using territory-based assignment or rule-based assignment or both to assign resources to opportunities, initially in your implementation you should validate the setting of the following two profile options: Opportunity Assignment Mode and Assignment Submission at Save Enabled.

Set Opportunity Profile Options

Here's how to set opportunity profile options:

1. In the Setup and Maintenance work area, go to:
    - Offering: Sales
    - Functional Area: Opportunities

  - Task: Manage Opportunity Profile Options

2. In the search region of the Manage Opportunity Profile Options page, select **Opportunity Management** as the application, or enter the profile option name directly in the **Profile Display Name** field.
3. In the list that's returned, click the profile option you want to retrieve the details about the profile option.
4. Set the profile option as needed.

These profile options influence the effect of territory-based opportunity assignment:

Profile Option Display Name	Default Value	Effect
Opportunity Assignment Mode	Territory-based Assignment Only	Specifies the type of assignment processing performed for opportunities. The available options are Territory-based Assignment Only, Rule-based Assignment Only, and Both (which runs both rule based and territory based assignment).
Assignment Submission at Save Enabled	No	Specifies whether to run assignment on an opportunity when it's saved in the UI. If you want assignment to run anytime users save an opportunity, set the profile option to `Yes`.
Territory Based Resource Assignment Style	All	Specifies if all members of the territory should be added to an opportunity team or just the owner. Or, if all (owner and members of the territory) should be excluded from the opportunity team. **Note:** The **Lock Assignment** check box, if selected, takes precedence and prevents a salesperson from being automatically removed from an opportunity through the assignment engine. Only users with Full access on the opportunity can select or deselect the Lock Assignment check box for sales team members.
Territory-Based Assignment Rule Category	None	Specify the rule category used for rule filtering during opportunity territory-based assignment.
Opportunity Resource Deal Protection Period	0	Specifies the default number of days that territory resources are protected to stay on a deal, even if ineligible through territory realignment.

Related Topics

- About Sales Resources and Opportunity Assignment
- Opportunity Team Profile Options
- Run Territory Assignment Process for Opportunities
- How do I update existing setup data?

Opportunity Team Profile Options

You set profile options to specify the default function and access levels for both internal and partner resources that you want added to the sales team for opportunities.

Opportunity Team Profile Settings

This table lists the profile options that affect opportunity team assignment and other team functionality.

Profile Option Display Name	Default Value	Effect
Internal Resource Sales Team Access Level Default	Edit	Determines the default access level for an internal resource added to the sales team.
Internal Resource Sales Team Function Default	Integrator	Determines the default function for an internal resource added to the sales team.
Partner Resource Sales Team Access Level Default	No Access	Determines the default access level for partner resources added to the opportunity sales team.
Partner Resource Sales Team Function Default	Integrator	Determines the default function for partner resources added to the opportunity sales team.

Related Topics

- About Sales Resources and Opportunity Assignment

Set Deal Protection on Opportunities

When a sales territory is assigned to an opportunity product line, the application copies over the territory resources (salespeople) to the opportunity sales team. When territory realignment happens, ineligible territory resources are removed from the sales team, unless you enable deal protection.

You enable deal protection by setting the profile option, Opportunity Resource Deal Protection Period (MOO_DEAL_PROTECTION_PERIOD). The profile option is set to 0 by default.

> **Note:** When you set the deal protection profile option, all existing sales team members are protected from realignment for the number of days for which deal protection is in effect.

Enable Deal Protection

Here's how to enable deal protection.

1. In the Setup and Maintenance work area, go to:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options
2. From the Search region of the Manage Opportunity Profile Options page, enter `Opportunity Resource` in the **Profile Display Name** field.
3. From the MOO_DEAL_PROTECTION_PERIOD: Profile Values region, in the **Profile Value** field, enter the number of days for which you want the deal protection to be in effect. For example, enter 15 if you want the deal protection to be in effect for 15 days.
4. Click **Save and Close**.

Related Topics

- How do I update existing setup data?

Sales Credit Recipient and Forecast Territory Predefined Logic

The sales application uses rules to set default sales credit recipients and forecast territories. When a product line is first added and saved on an opportunity, the line creator is automatically set as the sales credits recipient at 100 percent.

You can edit the default credit allocation, and you can add additional sales credit recipients as needed.

> **Note:** Nonrevenue credit recipients are never set by default and must be added manually.

After opportunity assignment is run, the application processes the existing credit allocations for each assigned product line to ensure that:

- An eligible territory is set as the forecast territory
- The credit recipient is an eligible resource from the forecast territory

> **Note:** The revenue or nonrevenue sales credit amounts are automatically rolled into the territory's forecast when the product line is added to the forecast.

Default Forecast Territory Logic

Here is the logic used by the sales application when setting the default forecast territory:

- Keep the forecast territory the user selected, as long as it's still assigned to the product line and its forecast participation type matches the sales credit type.
- Use the existing credit recipient to derive the forecast territory, whenever possible.

When setting default forecast territory:

- If the current forecast territory for the sales credit is one of the assigned territories with a matching forecast participation type, the application leaves it unchanged.

- If there is only one territory with a matching forecast participation type, the application sets that territory as the forecast territory.
- When there are multiple territories with a matching forecast participation type, the application chooses the forecast territory using the following precedence:
  - Territory where the existing credit recipient is the owner
  - Territory where the existing credit recipient is a member
  - Territory with a matching forecast participation type with the latest effective start date
- When there is no matching territory, the application doesn't set any data value for the forecast territory (this implies that there is a gap in the territory hierarchy). If the forecast territory for a sales credit allocation is set to having no data value (is blank) and opportunity assignment was done from the UI, a warning message appears.

Default Credit Recipient Logic

Generally, a sales credit recipient selected by the user isn't replaced by the application unless the recipient is no longer a qualified credit receiver. The application doesn't change the recipient if:

- The Lock Owner setting for the revenue item is enabled.
- The current credit recipient is under deal protection.
- The current credit recipient is an owner or member of the forecast territory.

If the preceding criteria aren't met, the application sets the forecast territory owner as the new credit recipient.

Related Topics

- Set Deal Protection on Opportunities
- Best Practices for Sales Credits
- How can I lock in a sales credit recipient?
- Set Opportunity Revenue Forecast Criteria

Opportunity Assignment Scheduled Processes

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],BindOptyCreationDateFrom=[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.	• BindSalesAccountUpdatedSince=[30] • For example, opportunities whose sales account was updated in last 15 days: BindSalesAccountUpdatedSince=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: BindSalesAccountUpdatedSinceHours=6	Multiple times per day
OpenOpportunitiesUpdatedInLastN	Revenue lines of all open opportunities updated within the last four hours. Optionally, the user can enter a different number of hours.	• BindOptyUpdatedWithinHours • For example, open opportunities updated within the last 6 hours: BindOptyUpdatedWithin=6	Multiple times per day
OpenOpportunitiesUpdatedInLastNDays	Revenue lines of all open opportunities updated in the last	• BindOptyUpdatedSince =[30]	Daily

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
	30 days. Optionally, the user can enter a different number of days.	• For example, open opportunities updated in last 15 days: BindOptyUpdated Since=15	
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
ClosedOpportunitiesByCreationDat	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
ClosedOpportunitiesByEffectiveDat	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. Optionally, the user can enter a different number of days.	• BindOptyUpdatedSince=[30] • For example, opportunities updated in last 15 days: BindOptyUpdatedSince=15	Daily
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	Multiple times per day

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
		within the last 6 hours: BindOptyUpdated Within=6	
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
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,	Daily

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
		BindEffective DateTo=2015-02-29	
ClosedOpportunitiesByEffectiveDat	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".

Run Territory Assignment Process for Opportunities

The batch process, Request Revenue Territory Assignment, evaluates opportunity revenue lines and matches eligible territories and their salespeople to the revenue lines. Use the procedures in this topic to run the process and monitor its success.

Prerequisites

Here are the prerequisites to successfully assign resources to opportunities using this process:

- The organization hierarchy exists with valid resources.
- Live territories exist.
- Open opportunities exist with open revenue lines.
- Territory attributes match attributes of open opportunity revenue lines.

- The profile option, Opportunity Assignment Mode, is set to either Territory-Based Only or Both (not Rule-Based Assignment).
- You run the process as a user with the Sales Administrator job role.

Find the Process

Here's how to find the process:

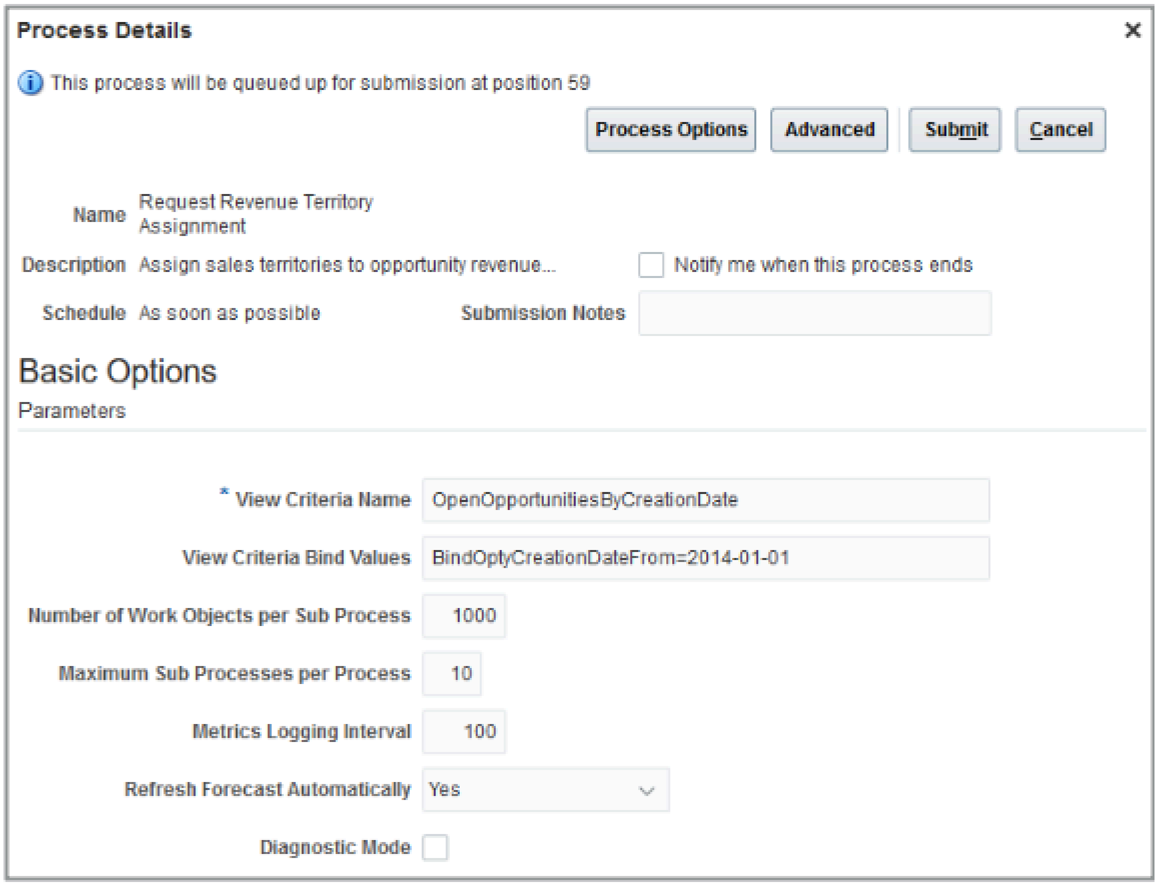
1. Navigate to **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process window, click the drop-down list next to the **Name** field and click **Search**.
4. In the Search dialog, enter the name of the process name, `Request Revenue Territory Assignment`, and click **Search**.
5. Select the process name that you want in the results that are returned and click **OK**.
6. Click **OK** again, if needed.
7. The Process Details window appears, where you will enter parameters using the steps in the next section, Enter Process Parameters.

Enter Process Parameters

Enter the process parameters in the Parameters tab of the Process Details window. The process parameters are called "view criteria" in the UI.

Since there are many different options when setting up the view criteria, here we are going to use a simple view based on opportunity creation date. When entering the data, remember that the values are case sensitive, and no spaces are used.

1. In the **View Criteria Name** field, enter OpenOpportunitiesByCreationDate as shown in this figure.



2. In the **View Criteria Bind Values** field, enter BindOptyCreationDateFrom=2014-01-01. This value captures all open opportunities created since January 1, 2014. The format must be yyyy-mm-dd.
   - To specify a date range, enter BindOptyCreationDateFrom=<date>, BindOptyCreationDateTo=<date>. Note the From and To values are separated by a comma.
   - Leave the field blank to capture opportunities in the default date range, the past 90 days.
3. For the purposes of this example, leave the remaining fields at their default values.
4. Next, schedule the process to run, as described in the next section, Schedule the Process.

Schedule the Process

Set the process to run either on a schedule or immediately in the **Schedule** tab of the Process Details window (available within Advanced options).

1. Click the **Advanced** button in the Process Details window.
2. Click the **Schedule** tab.
3. You can run the process on a schedule using the **Using a schedule** option and entering the schedule information. However, for the purposes of this example, we are going to run the process immediately. Click the **As soon as possible** option.

4. Click **Submit**.
5. If the process submitted successfully, a confirmation message appears with the request number (process ID). Make note of this ID to use it in the next step, Viewing Details of the Process Submission. Click **Ok** on the confirmation message dialog.
6. Close the Process Details window.

View Details of the Process Submission

You can view details of the process submission, to make sure it ran without errors and to see how many records were processed.

1. Back in the Scheduled Processes page, enter the process name, Request Revenue Territory Assignment, in the **Name** field and click **Search**.
    - Alternatively, you can enter the process ID in the **Process ID** field and click **Search**.
2. In the search results that are returned, click the job name to view details of the submission. The submission details include such information as:
    - Start date and time
    - Whether the job completed successfully
    - Parameters used in the job
    - Log file containing additional details like the number of work objects processed successfully or with errors and any error messages if the job wasn't successful

Related Topics

- Recommendations for Assignment Processes for Opportunities

Assign a Territory to Closed Opportunity with Revenue Lines

The batch process, Request Revenue Territory Assignment, evaluates closed opportunity revenue lines and matches eligible territories and their salespeople to the closed revenue lines.

Use the procedures in this topic to capture closed opportunities created in the last number of days, run the territory-based assignment process, and monitor its success.

Prerequisites

Here are the prerequisites to successfully assign resources to closed opportunities using this process:

- The organization hierarchy exists with valid resources.
- Live territories exist.
- Open opportunities exist with closed revenue lines.
- Territory attributes match attributes of closed opportunity revenue lines.
- The profile option, Opportunity Assignment Mode, is set to either Territory-Based Only or Both (not Rule-Based Assignment).
- You run the process as a user with the Sales Administrator job role.

Find the Process

Here's how to find the process:

1. Navigate to **Scheduled Processes**.

2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process window, click the drop-down list next to the **Name** field and click **Search**.
4. In the Search dialog, enter the name of the process name, `Request Revenue Territory Assignment`, and click **Search**.
5. Select the process name `Request Revenue Territory Assignment` to assign sales territories to opportunity revenue lines by matching revenue attributes with territory dimensions and click **OK**.
6. Click **OK** again, if needed.
7. The Process Details window appears, where you will enter parameters using the steps in the next section, Enter Process Parameters.

Enter Process Parameters

Enter the process parameters in the Parameters tab of the Process Details window. The process parameters are called "view criteria" in the UI.

There are many different options when setting up the view criteria. This example uses a simple view based on opportunity close date. When entering the data, remember that the values are case sensitive, and no spaces are used.

1. In the **View Criteria Name** field, enter `ClosedOpportunitiesByCreationDate`.
2. In the **View Criteria Bind Values** field, enter `BindOptyCreationDateTo date, BindOptyCreationDateFrom date`. This value captures all closed opportunities created in the last 90 days. Optionally you can pass a different date range. The format must be yyyy-mm-dd.
   - For example, to specify a date range, enter `BindEffectiveDateFrom=2012-01-01, BindEffectiveDateTo=2012-02-29`.
   - Leave the field blank to capture opportunities in the default date range, the past 90 days.
3. For the purposes of this example, leave the remaining fields at their default values.
4. Next, schedule the process to run, as described in the next section, Schedule the Process.

Schedule the Process

Set the process to run either on a schedule or immediately in the **Schedule** tab of the Process Details window (available within Advanced options).

1. Click the **Advanced** button in the Process Details window.
2. Click the **Schedule** tab.
3. You can run the process on a schedule using the **Using a schedule** option and entering the schedule information. However, for the purposes of this example, we are going to run the process immediately. Click the **As soon as possible** option.
4. Click **Submit**.
5. If the process submitted successfully, a confirmation message appears with the request number (process ID). Make note of this ID to use it in the next step, Viewing Details of the Process Submission. Click **Ok** on the confirmation message dialog.
6. Close the Process Details window.

View Details of the Process Submission

You can view details of the process submission, to make sure it ran without errors and to see how many records were processed.

1. Back in the Scheduled Processes page, enter the process name, Request Revenue Territory Assignment, in the **Name** field and click **Search**.
   - Alternatively, you can enter the process ID in the **Process ID** field and click **Search**.

2. In the search results that are returned, click the job name to view details of the submission. The submission details include such information as:
   - Start date and time
   - Whether the job completed successfully
   - Parameters used in the job
   - Log file containing additional details like the number of work objects processed successfully or with errors and any error messages if the job wasn't successful

Related Topics
- Recommendations for Assignment Processes for Opportunities

Rule-Based Opportunity Assignment

Edit Assignment Rules to Randomly Assign Resources to Opportunities

Create assignment rules using rule sets, rules, conditions, and actions. You can also edit rules and run assignment to randomly assign resources to opportunities. The assignment process uses rules to evaluate and recommend candidate assignments for specified work objects.

A rule category is predefined for each type of rule-based assignment processing supported by each sales application object. For example, the rule category Sales Team Member Recommendation Default Rule Category is predefined for resource rule-based assignment of Opportunities. When the filter is set to **Random**, a random selection of matching candidates is assigned to the work object.

For example, rules exist to assign any opportunity for software products in the California locations to Scott and Lisa, and server products to Tracy and Bill. Currently, the rules are configured to randomly assign one of the sales representatives to opportunities in different locations. You now want to update these rules to include new sales locations in San Diego and Sacramento.

Edit Assignment Rules

Here's how to modify assignment rules.

1. In the Setup and Maintenance work area, go to:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Assignment Manager Rules
2. In the Manage Sales Assignment Manager Rules page, select the category where your existing rules were created, in this case **Sales Team Member Recommendation Default Rule Category**.

   > **Note:** Random is selected as the filter type.

3. In the **Conditions** section of the existing rule, update these details for your object:
   - **Attribute** = Account State
   - **Operator** = Equals
   - **Value** = San Diego

- **Attribute** = Account State
- **Operator** = Equals
- **Value** = Sacramento

4. Click **Save and Publish** to publish the assignment details.

Run Assignment

Mateo Lopez, who's the sales manager for the Western Region, signs in to search for new software opportunities from Pinnacle Technologies in the Sacramento location. When he finds an opportunity, he runs the assignment process so that the opportunity is assigned to either one of the sales representatives, Scott or Lisa, as follows:

1. Navigate to **Sales** > **Opportunities**.

   The opportunity landing page displays your opportunities.
2. Select the opportunity you want.
3. Click **Actions**.
4. Click **Save and Run Assignment**.

   Each time you run assignment on this opportunity, it could be assigned either to Lisa or to Scott, because the assignment rule is set to assign resources randomly.
5. Click the **Team** tab to check which sales representative is assigned to the opportunity.

Related Topics

- How are territories assigned to opportunities?
- About Sales Resources and Opportunity Assignment
- What types of assignment rules can I create?
- How do I update existing setup data?

Set Rule-Based Opportunity Assignment Profile Options

Whether you're using territory-based assignment or rule-based assignment or both to assign resources to opportunities, initially in your implementation you should validate the setting of these two profile options: Opportunity Assignment Mode and Assignment Submission at Save Enabled.

Set Opportunity Assignment Profile Options

Here's how to set opportunity assignment profile options.

1. In the Setup and Maintenance work area, go to:

   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Opportunity Profile Options
2. From the Manage Opportunity Profile Options page, enter the profile option name directly in the **Profile Display Name** field.
3. In the list that's returned, click the profile option to retrieve the details about the profile option.
4. Set the profile option as needed.

These profile options influence the affect of rule-based opportunity assignment:

Profile Option Display Name	Default Value	Effect
Opportunity Assignment Mode	Territory-based Assignment Only	Specifies the type of assignment processing performed for opportunities. The available options are Territory-based Assignment Only, Rule-based Assignment Only, and Both (which runs both rule based and territory based assignment).
Assignment Submission at Save Enabled	No	Specifies whether to run assignment on an opportunity when it's saved in the UI. If you want assignment to run anytime users save an opportunity, set the profile option to `Yes`.
Sales Team Member Assignment Rule Category	None	Specify the assignment rule category used by the automatic assignment process to assign sales team members to opportunities.

Related Topics

- Set Opportunity Assignment Profile Options
- Opportunity Profile Options Default Values and Effects
- How do I update existing setup data?

How You Refresh Assignment Candidate Cache

Candidate data, such as resources, are loaded into a cache and used for each assignment request. Rule-based assignment requests that identify matching candidates or scores for matching candidates use candidate data.

You can refresh the candidate data cache at regular intervals using the Perform Assignment Data Publish, Refresh, and Synchronization scheduled process. This process marks the candidate for refresh, and the candidate data is refreshed the next time there is an assignment request using that candidate.

> **Note:** This feature affects rule-based assignment using the rule set types of matching candidates or matching candidates with scoring only.

You can schedule this process daily, weekly, and so on, based on the frequency of changes to the candidates. Consider how often the candidate data changes and how critical is it to have the changes available for use in assignment. For example, resource details may change daily and therefore the resource candidate data cache for managing leads may need to be updated once every day.

The refresh cache process has these parameters that you must enter:

Candidate Object	Owner Module
Resource_Candidate_Object	Sales
Resource_Candidate_Object_Lead	leadMgmt
ORA_Deal_Resource_Candidate_Object	leadMgmt

Candidate Object	Owner Module
ORA_Queue_Candidate_Object	svcMgmt

> **Note:** Don't enter or select values for the **Application** and **Publish** parameters if you want to run the refresh cache process.

For example, you can schedule one process for managing leads, using the parameter `Resource_Candidate_Object_Lead/leadMgmt`. Sales would need a process scheduled with the parameter `Resource_Candidate_Object/sales`.

Related Topics

- Run Territory Assignment Process for Opportunities
- Recommendations for Assignment Processes for Opportunities
- Schedule Account Assignment

Lead Assignment

Overview of Lead Assignment

Lead assignment is an automated process that assigns leads to sales resources, sales territories and partners. Sales leads require assignment, either in real-time or in batch.

Batch assignment runs batch processing that matches the lead objects, either as a one-off or on a scheduled basis. The two types of lead assignment are:

- Rule-Based Assignment

  You can automatically calculate a score for each lead, or determine an appropriate rank or qualify a lead using rule based assignment. Assignment rules help ensure that sales resources are properly assigned to leads, and leads are appropriately scored, ranked or qualified. Select from predefined attributes or configure custom lead attributes to use in lead assignment rules.

- Territory-Based Assignment with Rule Filtering

  Territory-based assignment relies on an association between attributes on the lead work object and attributes on the lead territory candidate object to match the candidates to the work object. For territory-based assignment, the lead work object and lead candidate object must have attributes that share the same domain of values.

  Leads use Territory-Based Assignment to identify matching territories and then set up additional rules (Rule-Based Assignment) to filter the final set of territories that are returned, using any attribute of the work object.

Lead Assignment Profile Options

Lead assignment profile options are configurable options that affect assignment manager application operations. Values defined at the user level take precedence over those at the site level. If a value isn't defined at the user level, the site level value is used.

Lead Assignment

This table lists the profile options that affect the assignment of lead status, rank, score, resources, and territories on the lead. Before setting these profile options, you must perform the tasks listed under Configure Assignment Manager for Lead Processing setup task. From there you can review and update assignment of candidate objects such as rank, qualification status, and resources to leads.

Profile Option Display Name	Default Value	Effect
Assignment Rule for Qualifying Leads (MKL_LEAD_ASSIGNMENT_QUAL_RULE)	None	Specify the rule to evaluate the lead and assign the lead status per rule conditions.
Assignment Rule for Ranking Leads (MKL_LEAD_ASSIGNMENT_RANK_RULE)	None	Specify the rule to evaluate the lead and assign the lead rank per rule conditions.
Assignment Rule for Rule-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_MATCHING_RULE)	None	Specify the rule to evaluate the lead and assign the sale team resources per rule conditions.
Assignment Rule for Scoring Leads (MKL_LEAD_ASSIGNMENT_SCORE_RULE)	None	Specify the rule to evaluate the lead and assign a score per rule conditions.
Assignment Rule for Territory-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_RULE)	None	Specify the rule to evaluate the lead and further filter territories derived using territory-based assignment per rule conditions.
Lead Assignment Mode (MKL_LEAD_DEFAULT_ASGN_MODE)	Both	Specify the default assignment mode type allowed during on-demand or automatic lead assignment. On-demand assignment occurs when a user selects the assign lead action in the UI.
Lead Batch Reassignment (MKL_LEAD_BATCH_ASSIGNMENT)	N	Enable batch lead reassignment, in addition to lead automatic reassignment. For example, when leads are selected for reassignment, they get reassigned when the Request Sales Lead Assignments process next runs using the Reassign process selection criteria.

Territory-Based Lead Assignment

Considerations for Territory-Based Lead Assignment

Territory-based assignment relies on an association between attributes on the lead work object and attributes on the lead territory candidate object to match the candidates to the work object.

For territory-based assignment, the lead work object and lead candidate object must have attributes that share the same domain of values.

Components That Affect Lead Assignment

Leads are ready for assignment once the data on the lead is cleansed, created, enriched, and scored. Here are the components that influence the assignment of leads:

- Lead work objects
- Lead candidate objects
- Attributes
- Mapping and rule conditions

Mapped attributes are used for matching appropriate candidates for a work object. For example, a sales lead (work object) has a geographic location attribute. The lead candidate object (territory) has also a geographic location attribute. These two attributes are mapped to each other.

Leads, including leads with an associated existing account, and net new leads, are assigned based on several criteria as outlined here. Net new leads are leads where the account and contact information remain on the lead until the lead is qualified and converted.

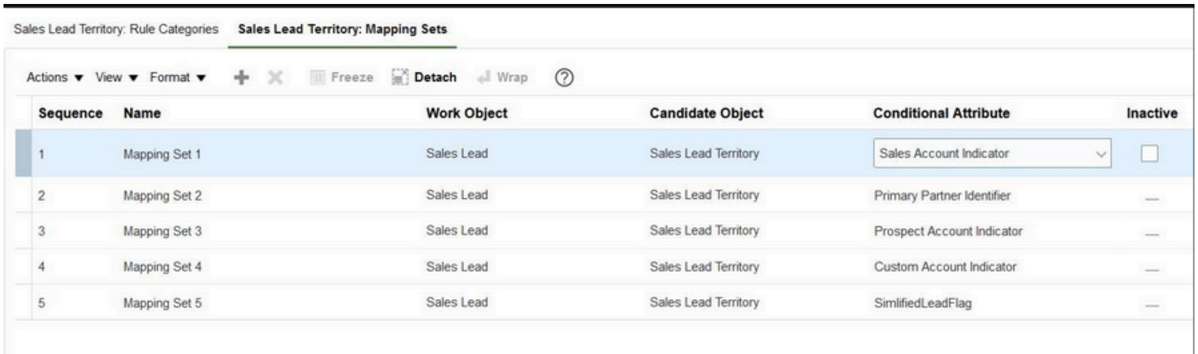
Assignment criteria for leads	Assignment criteria for leads with an associated account	Assignment criteria for net new leads
Lead Source Geography Named accounts, such as the top 20 Industry Product Partner for working with a partner organization Primary sales channel associated with the lead Associated marketing campaign that generated the lead	Geography (Primary Address of the Account) Named account Industry - Customer/Organization Size Organization Type Auxiliary Classifications 1 - 3 Product	Geography (Contact Address on the Lead) Industry Organization Type Product Sales Channel Primary sales channel associated with the lead Business Unit Partner for working with a partner organization

For example, lets take the following scenarios for a lead. A lead has either:

- A new Account where the CustomerId has a null value (no data) but other Account related fields such as AccountName, OrganizationType, OrganizationSize, and so on, have values.

- An existing Account where the CustomerId has a non-null value (has data) as do the other Account related fields.
- A new Contact where the PrimaryContactId has a null value (no data) but other Contact related fields such as PrimaryContactName, JobTitle, PrimaryContactEmailAddress, and so on, have values.
- An existing Contact where the PrimaryContactId has a non-null value (has data) as do the other Contact related fields.

The Sales Lead Territory: Mapping Sets subtab showing the **Conditional Attribute** column to indicate which mapping set becomes active. Depending on the lead's data, more than one mapping set becomes active to find and assign the matching territories. You can select or deselect the **Inactive** check box to activate or deactivate any of the mapping sets.



Sequence	Name	Work Object	Candidate Object	Conditional Attribute	Inactive
1	Mapping Set 1	Sales Lead	Sales Lead Territory	Sales Account Indicator	
2	Mapping Set 2	Sales Lead	Sales Lead Territory	Primary Partner Identifier	—
3	Mapping Set 3	Sales Lead	Sales Lead Territory	Prospect Account Indicator	—
4	Mapping Set 4	Sales Lead	Sales Lead Territory	Custom Account Indicator	—
5	Mapping Set 5	Sales Lead	Sales Lead Territory	SimlifiedLeadFlag	—

If the account on a lead is removed, then no mapping set is active. However, the predefined mapping set won't remove the territories assigned to lead. To replace the current territories assigned to a lead with another set on the next assignment run, you must select the **Replace Candidates** check box from the Sales Lead Territory: Candidates subtab on the Manage Sales Lead Assignment Objects page.

1. In the Setup and Maintenance work area, go to:
   - Offering: Sales
   - Functional Area: Leads
   - Task: Manage Sales Lead Assignment Objects
2. On the Manage Sales Lead Assignment Objects page, locate and select **Sales Lead** in the **Name** column.
3. In the **Sales Lead: Details** region, select the **Candidates** tab.
4. Select the candidate object **Sales Lead Territory** and expand this row and check what's the current setting for no rows matching.
5. Select **Replace Candidates** if you want to replace disqualified candidates on the team when the next assignment request is run.

How Leads Are Assigned

Leads can be assigned based on simple rules evaluation. Leads that have an associated account with an address are distributed based on territory definitions. Territory-based evaluation can be supplemented by adding filtering rules to further refine the lead assignment. Territory-based evaluation uses:

- Lead work object
- Territory candidate object data
- Mappings between the territory dimensions and lead dimensional attributes to execute the assignment processing

Examples of Lead Assignment Setup

A default set of lead work objects and associated candidate objects are predefined. However, you can set up the necessary lead work objects, and associated candidate objects, rules and mappings for assigning leads to suit your business requirements.

- Set up rules and rule sets specific to your business requirements.

  For example, set up an assignment rule to assign leads with deal size less that a certain amount to partners.
- Set up object mappings for territory-based assignment.

  For example, assign a lead to those territories where Territory dimensional attributes are mapped to corresponding Lead attributes.
- Set up rules to filter territories that match the lead based on additional information on the lead.

  For example, set up rules to exclude prime sales territories that match leads which are unqualified.

Related Topics

- Overview of Lead Assignment
- Lead Assignment Rules
- Overview of Scheduling Lead Processing Activities

Lead Assignment Rules

You specify assignment rules for leads to determine the rank, assign sales resources, calculate scores, and qualify leads. This topic provides some examples of how assignment rules are evaluated. It also outlines some basic questions to consider before creating rules.

Assignment rules are created using work objects, candidate objects, attributes, and conditions. You can use multiple types of assignment rules and rule sets for assignment of candidates, such as rank, qualification status, and resources, to the lead. For example, you can specify the assignment rule that assigns resources to sales leads by assigning individual sales resources that meet the rule criteria.

When creating an assignment rule that uses a check box field, note that the value of true may be denoted by "Y" or "Yes" or "T". Ensure the check box is clear is you want to denote a false value.

Assignment Rule Criteria

An assignment rule can have one or more assignment criteria. For example, all leads, lower than a certain deal size and for a specific product, are assigned to a specific Partner resource. Another example might include assigning only those leads generated from a specific marketing campaign, such as a CEO round table discussion event, to a specific salesperson.

Assignment Rule Considerations

When designing rules, carefully consider how you want to match the candidates to the lead. For example, would you want resources assigned based on their geographic location, or their product knowledge, or their skill level, or a combination of any of these attributes? Do you want to match candidates only, or would you like to match them and score them to identify the best fit? In a multiple candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score?

Note: You can assign resources to leads only through rule-based assignment.

Related Topics

- Example of Using Territory-Based Assignment with Rule-Based Filtering
- What types of assignment rules can I create?

How Lead Status is Automatically Set

Lead quality is assessed as soon as a lead is generated. This topic describes the settings that are used to determine the qualification status of a sales lead. Lead quality of a newly created lead is based on:

- Characteristics of the customer contact on the lead
- Type of response which caused the lead to be generated

Lead quality is further assessed based on added qualification data such as customer need, urgency or time frame for the project, and whether a budget is approved for the product.

Settings That Affect Lead Qualification Status

Leads can get their qualification status from:

- Assignment rules

  Rules-based leads qualification process helps standardize the lead qualification process. Based on the positive results to conditional rules, the value of the Lead Status attribute is set to Qualified. For example, a rule can be defined to update the lead as qualified if the:

  - Customer's budget status is approved
  - Project time frame is three months
  - Decision maker is identified
  - Response type is that the customer attended an event
- An imported value

  Leads imported through file import can include a designated lead qualification status.

How Lead Qualification Status Is Calculated

In some companies, the lead qualification data gathered by lead qualifiers is considered in the scheduled automated process that calculates lead score or lead rank as well as assigning sales team territories. For such companies, a simple rule to move leads to a Qualified status when the lead score reaches a specific threshold is sufficient.

Examples of Territory-Based Lead Assignment

You can assign leads to the appropriate territories based on matching lead attributes to territory dimensions.

This topic provides some examples of the relationship between the assignment of sales leads to territories. It also contains examples of different dimensions used to assign sales leads to the correct sales territories.

A territory is the jurisdiction of responsibility of a sales resource over a set of sales accounts. Use territory-based assignment to assign sales territories to leads.

Assign Territories to Lead Territory Team

You can set up Assignment Manager to automatically assign sales territories to the lead using territories defined in Territory Manager. For example, a salesperson navigates to the leads list and opens the newly created lead. Using the Reassign action, the salesperson accesses the assignment manager feature and selects an option to run automatic assignment immediately to reassign the lead to the appropriate territories.

Territory-Based Assignment Mapping

You can leverage predefined territory-based assignment mappings to match the correct territories with each lead. For example, you can map the location attribute on the lead to the geography attribute on the territory. Any territories where the geography value matches the location of the lead is matched and assigned the lead.

Ensure you have defined your territory boundary based on dimensions. There's only one set of mappings for a work object and candidate object combination. The mappings for various assignment scenarios (such as assignment of a territory to a lead) must be setup through a mapping that assigns appropriate sales territories to a lead territory team. If the lead needs rule-based assignment, then rule sets are used. If the lead needs territory assignment only, then the rules may not be required.

Examples of Enabling Territory Dimensions

You can enable only the dimensions that your organization requires for defining territories. These examples illustrate different dimensions used to assign sales leads to the correct sales territories.

Dimension	Use
Geography	For most of your sales activities, you want to assign salespeople by city and postal code.
Account	You have a few key accounts that should belong to top salespeople. Use the account dimension to create territories for individual sales accounts.
Customer Size	One product line is suitable only for organizations above a certain size, and you have a few skilled salespeople for that product line. Use the customer size dimension to assign skilled salespeople to 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	Your sales department prefers to engage partners as indirect sales channel, and telesales functions in addition to the direct sales force. You can create territories for these different sales channels such as telesales, direct, and indirect sales channels.

How to Edit Auxiliary Dimensions for Lead Territory Assignment

This topic is applicable for the lead assignment set up where you want to change auxiliary dimension mappings to point to different classification codes as part of your lead territory assignment.

Here are the predefined auxiliary dimension work object attribute mappings:

- Aux1 - Auxiliary Classification Code 2
- Aux2 - Auxiliary Classification Code 1
- Aux3 - Auxiliary Classification Code 3

You now have a scenario where your organization wants to change these mappings. For this example, you want:

- Aux1 - Work Object attribute to point to Classification Code 3
- Aux3 - Work Object attribute to point to Classification Code 4

Set the Lead Territory Assignment Mapping

Here's how to change the mappings:

1. In the Setup and Maintenance work area, go to:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Assignment Objects
2. On the Manage Sales Lead Assignment Objects page, locate and select **Sales Lead** in the **Name** column.
3. In the **Sales Lead: Details** region, select the **Candidates** tab.
4. Select the **Sales Lead Territory** candidate.
5. Select the **Sales Lead Territory: Mapping Sets** tab.
6. In the **Name** column, select **Mapping Set 5** from one of these active mapping sets for the sales lead object you want:
    - **Mapping Set 1**
    - **Mapping Set 2**
    - **Mapping Set 3**
    - **Mapping Set 4**
    - **Mapping Set 5**
7. In the **Mapping Set 5: Mappings** region, locate and select the `Aux1` and `Aux3` auxiliary dimension function code.
8. Click the pencil icon to edit them in the Edit Mappings dialog window.
9. In the **Work Object Attribute** region select these attributes.
    - Aux1 - Auxiliary Classification Code 3
    - Aux3 - Auxiliary Classification Code 4.
10. Click **OK**.
11. Click **Save and Publish**.
12. Monitor and refresh the page to confirm the publish process has succeeded.

The sales lead assignment processing is now ready to use the changed auxiliary dimension information when assigning leads to territories.

Lead Assignment Scheduled Processes

Overview of Scheduling Lead Processing Activities

This topic outlines the lead processing activity that sets lead rank, score, and lead qualification status for a selected batch of leads.

Lead data is generated from a variety of sources and goes through further enrichment based on updates and follow-up activities. As a result, lead quality must be assessed periodically so that leads get distributed to the right salesperson to ensure timely lead follow up and closure.

> **Note:** Privileges provide the access required to run specific scheduled processes. Privileges are granted to duty roles, which are granted to job roles. To see which job roles inherit the required privileges, use the Security Console or the security reference manuals for the appropriate product family. For example, to update Lead records, you need to be granted the MKL_UPDATE_SALES_LEAD_PRIV privilege.

Leads are distributed to individual salespeople and sales territories for further qualification and follow-up. The **Create Lead Processing Activity** page enables you to:

- Define and submit lead processing activities
- Search for and select specific leads to process
- Start or schedule the lead processing activity

Activity Details

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. The process type determines the type of activity you want to process such as:

- Lead assignment
- Qualification
- Ranking
- Scoring

Each type is associated with appropriate rule categories and assignment rules for the profile option used to activate the lead processing activity, such as, Assignment Rule for Ranking Leads. For example, if you select lead ranking as the process type, then rank assignment rules are used for processing the selected leads.

Lead Selection

You can use filtering criteria for selecting leads as input to the lead processing activity. For example, you can process leads that are unassigned, or leads that have a status of qualified. The selected leads are processed (qualified, ranked, scored, assigned) based on the corresponding assignment rules defined.

Schedule

Lead processing activities are scheduled for the purposes of periodic ranking, scoring, qualification, and distribution of leads. Due to the periodic nature of all lead processing activities, it's necessary to automate the running of these activities. Enter scheduling options such as schedule mode and frequency to determine when the lead processing activity should begin and how often the activity is repeated.

Related Topics

- Batch Assignment Diagnostic Log
- Example of Running Lead Batch Assignment in Diagnostic Mode
- About Purging Batch Assignment Information

Example of Running a Lead Assignment Process

This example describes running a lead assignment process twice. First, run the process to assign imported leads to the inside sales representatives for lead qualification. Next, assign the qualified leads to field sales for conversion to opportunities.

Here's how to create a lead processing activity to run the lead assignment process:

1. Search for and open the task **Manage Lead Processing Activities** from the Setup and Maintenance work area.

   The Lead Processing Activities page appears. This page lists all of your processing activities.
2. Click **Create Lead Processing Activity**.

   The Create Lead Processing Activity window appears.
3. To assign the leads you previously imported to inside sales for qualification, enter the parameters listed in this table.

UI Region	Field	Entry
Activity Details	**Process Type**	**Assignment**
Lead Selection	**Status**	**Unqualified**
Lead Selection	**Assignment Status**	**Unassigned**
Schedule	**Schedule Mode**	**Immediate**

4. Click **Submit**.
5. Next, create and submit a second activity to assign the leads to field sales after the leads are qualified. Enter the parameters listed in this table.

UI Region	Field	Entry
Activity Details	**Process Type**	**Assignment**
Lead Selection	**Status**	**Qualified**
Schedule	**Schedule Mode**	Run this activity on a repeating schedule to make sure the leads are transferred to field

UI Region	Field	Entry
		sales as soon as they're qualified by inside sales. To run the activity regularly, select **Repeats**, enter a frequency, a start date, and an end date far into the future. You must enter both a start date and an end date for the process to run.

6. You can monitor the processes on the Manage Lead Processing Activities page. This page lists all of your processing activities.

Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the job set process by name on the Overview page.

You can also set up the process to run regularly per your business requirements as follows:

1. Click **Advanced**.
2. Click the Schedule tab.
3. Select the **Using a schedule** option.
4. Select the frequency and start date.
5. Enter an end date far in the future.
6. Click **Submit**.

Example of Running Lead Batch Assignment in Diagnostic Mode

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running lead batch assignment in diagnostic mode.

Running Batch Assignment

A sales representative of a company has to follow up on a lead but the lead hasn't yet been assigned to his territory. He has requested you, the sales administrator, to investigate the details of territory assignment. You can provide these details by running lead batch assignment in diagnostic mode.

1. Go to **Navigator**, and then select the **Lead Qualification** menu item.
2. Select **Lead Processing Activities** on the **Tasks** pane.
3. On the Lead Processing Activity page, click the **Create Lead Processing Activity** button.
4. On the Create Lead Processing Activity page:
   a. Select **Assignment** from the **Process Type** list.
   b. Enable diagnostic mode by checking the **Diagnostic Mode** check box.
   c. Search and select a lead. Note down the lead number value to use in a later step.
   d. Select **Immediate** from the **Schedule** list.
   e. Click **Submit**.
5. On the Confirmation dialog box, click **OK**.

   Two process are submitted, one for lead territory assignment and the other for lead rule-based (or resource) assignment. Note down the identifier of the territory or resource assignment processes you're interested in.
6. Click the Refresh icon until the process has completed successfully or with an error.

7. Select the appropriate territory or rule-based assignment process, and then click the Output log icon in the **View Log** column to view details.

Open the log file in another browser window or tab.

> **Note:** The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the file may be difficult to read.

View the log file for details of the assignment processing for the selected lead. You can use the lead number recorded earlier to search in the log file. Review the file for details of the assignment processing.

Related Topics

- Batch Assignment Diagnostic Log

Rule-Based Lead Assignment

Lead Ranking

When setting up lead management capabilities, you can predefine criteria to rank leads. You can define lead rank to categorize leads into buckets such as Hot, Warm, or Cool. Although lead rank and lead score aren't the same, they serve a similar purpose.

Create Ranking Rules

When a sales lead is created, a lead rank is first calculated based on assignment rules. The ranking classification rule set type determines the rank of the lead based on the values of the attributes on the lead. These data points help to evaluate lead ranking rules:

- All data included on the lead and lead primary product data
- All customer profile data including industry and customer size classifications
- All contact profile data
- All lead qualification data

Here's how you can set up a lead rank rule:

1. Navigate to the Setup and Maintenance work area and select Manage Sales Lead Assignment Rules task.
2. Select the Sales Lead Ranking Rule Category.
3. Create a rule set with a rule set type of Classification Rule.
4. Set the work object as lead and the candidate object as lead rank.
5. Create a rule with conditions that match the attribute settings you want a lead to have to give it a rank value.

   For example, you might select the Decision Maker Identified attribute name and then select the equal (=) operator.
6. Enter the value of True.

   > **Note:** When creating an assignment rule that uses a check box field, note that the value of true may be denoted by "Y" or "Yes" or "T". Ensure the check box is clear is you want to denote a false value.

7. Create any other remaining conditions that you want, and then enter the action for your rule, such as Return the candidate value as Hot.

Calculate Lead Rank Based on a Score

You can schedule when and how often to process lead ranking where the lead rank value or score is calculated and displayed. Ranking rules determine what rank to assign to a lead. You can also create ranking rules that use the lead score as the criteria to name each range of scores with a specific rank.

For example, if the lead score is between a value range of 0 and 39, you can create a rule to rank the lead as low priority. If the lead score is between a value of 40 and a value of 60, then create a ranking rule that assigns a medium rank to the lead. The assignment manager process passes the rank value to the lead management process and a rank value is displayed as a list. You can override the value by selecting a different predefined rank code or value from the list.

Related Topics

- Example of Creating a Lead Ranking Rule

How can I define the automatic assignment of Lead team resources?

Using a scheduled process, you can automatically assign lead team members and appropriate sales territories to leads. The scheduled process accepts criteria to determine the batch of leads to be assigned.

During the rule-based assignment phase of the batch process, matching candidates are automatically added to the lead team. During the territory-based assignment phase of the batch process, territories are automatically added to the lead territory team.

This example outlines how to set up lead assignment tasks and to schedule the tasks in sequence so that you can automate the lead resource assignment process.

Scenario

The automotive sector uses geography data and overall lead quality to periodically assign leads to automotive dealers. You can assign leads automatically by using score and rank criteria before being assigned a resource. Leads are automatically assigned through the assignment manager feature by associating assignment criteria to assignment rules. For example, leads are assigned based on the following criteria:

- Lead source
- Geography
- Lead score
- Named accounts, such as the top 20
- Industry
- Products

When partners must engage with customers to ensure a timely sales follow up, set up assignment manager to automatically assign partner leads to internal channel managers.

Manual Setup Assignment Manager Tasks

You can perform manual setup tasks through the assignment manager UI as follows:

- Define lead distribution rules
- Define partner matching rules
- Define the quality parameters to assign leads for follow-up activities

- Set up lead qualification rules
- Set up lead classification rules to assign leads to specific sales channels
- Set up lead routing rules to route leads to sales resources in a selected sales channel
- Set up lead distribution rules to assign leads to a specific salesperson or a partner sales territory

Use rule sets if you're assigning leads by rule-based assignment. If the lead requires territory-based assignment only, then rule sets aren't used. During a lead import, either ranking or scoring is used as the default qualification criteria. However, if scoring is used to determine the lead rank, then both lead score and lead rank can be used as criteria for assigning lead resources.

Automatic Assignment Manager Tasks in Batch Mode

To automate assigning lead resources, schedule and sequence these tasks to occur in this order when assignment manager runs in batch mode:

- Assign leads to a sales channel
- Route leads to sales organizations and sales territories
- Assign leads to individual salespeople or partners

You can also manually assign leads to specific internal or external resources. You can make these selections:

- Job type
- Rule set
- Filtering criteria for selecting lead

Related Topics

- What types of assignment rules can I create?
- How can I assure that the assigned lead owner remains the owner when the lead is converted?

Examples of Sales Lead Team

A sales lead team is made up of assigned territories and individual team members. Here are some examples that illustrate some of the features available for the sales lead team.

- Automate assignment of individual resources to sales lead team
- Add ad hoc members to sales lead team
- Update access rights based on the resource
- Change the lead owner

Automate Assignment of Individual Resources to Sales Lead Team

The sales lead team for your company wants to add a support person to the lead. Typically, support people aren't part of any sales territory. Use the Manage Sales Lead Assignment Rules task to set up a rule set for the category, Sales Lead Resource Rule Category. For example, assign support team members as individual resources based on rules which match the lead product with specific support team members.

Add Ad Hoc Members to Sales Lead Team

Generally, sales team resources are automatically assigned to leads based on configured assignment rules. The following scenarios provide examples of when you may want to manually add additional team members to assist with the lead.

- The lead owner, who has full access to your company lead, wants to add one of his company's contractual experts to his team to help pursue the lead. The lead owner manually accesses the resource drop-down list and selects the ad hoc resource that he wants to add to his team.
- When pursuing a lead for an insurance policy, the customer contact requests a unique and complex combination of policy components that require a review from an expert in the company. The lead owner adds the expert resource to the lead with full access. Now, the expert resource can update the lead with valid combinations of products and services, and, if required, add more team members to the team.
- A salesperson is pursuing a lead that requires the export of products outside the country. He wants to ensure there are no legal issues with exporting the products. The salesperson adds a member of their company's legal team to the lead to review the details before contacting the customer again.

Update Access Rights Based on the Resource

When a resource is added to the sales lead team through rule-based assignment, the profile option, Internal Resource Sales Team Access Level Default, determines the member's default access level. Resources in the management hierarchy of a newly added team member have the same level of access to the sales leads as the team member. See *Account Team Member Access Levels* and *Opportunity Team Profile Options* for more information.

All members of the sales territories assigned to the lead have full access to the lead. Owners of ancestor territories of all sales territories assigned to the lead also have full access to the lead.

Change the Lead Owner

Only the lead owner, or the resources in the management hierarchy of the lead owner, can change the ownership of the lead.

Related Topics

- How Users Gain Access to Leads

Example of Lead Score Calculation

Use a lead score only when the lead is easily quantified. You might use the score to calculate the lead rank. You can schedule when and how often to perform lead scoring.

Here's an example of how lead score is calculated.

How Lead Score Is Determined

To get a lead score, the rules engine needs to determine a numeric score based on the value of the lead attribute participating in the rule. For example, consider this rule:

- If a lead contact is a high-level executive, then add a score of 100. If the lead contact is an operations manager, then add a score of 50.

When the rules engine evaluates the lead, it scores the lead based on the job title of the lead contact. After the rules engine evaluates all such rules, the result of the scoring process is an aggregate score, that's then recorded in the Lead Score attribute.

Data Points for Lead Scoring

These data points form part of the overall score evaluation:

- All data included on the lead and primary product
- Lead source data such as campaign attributes
- All customer profile data including industry
- All contact profile data

Example of Creating a Lead Ranking Rule

You can define a lead rank to categorize leads into buckets such as Hot, Warm, or Cool leads. This categorization of leads lets a salesperson quickly prioritize leads for follow-up activities.

Here's an example of creating a lead ranking rule:

Create a Lead Rank Rule

Your organization wants to assign a rank of Hot to sales leads that have a set time frame and a decision maker identified. In Assignment Manager, there's already a predefined lead work object and lead candidate object.

Here's how to set up an assignment rule to determine the appropriate classification to apply a rank to all leads for your organization:

1. From the Manage Sales Lead Assignment Rules page, select the **Sales Lead Ranking Rule Category**.
2. Select the classification rule type, Sales Lead work object, and Lead Rank as the candidate object.
3. From the **Associated Rule Set Groups** tab, create a ranking rule and name it `Ranking`. You can search and select another rule set group (if one exists), to associate with the classification rule type.
4. Set the conditions for each rule that the rules engine checks during assignment processing. For example, enter these rule conditions:
   - Attribute: Time Frame
   - Operator: Equals
   - Value: Three months
5. Click **Add Row** icon in Conditions and enter these details:
   - Attribute: Decision Maker Identified
   - Operator: Equals
   - Value: True
   - Action: Return the candidate value as Hot
6. Click **Save and Close**.

The Assignment Manager:

- Finds the matching leads
- Executes the rules
- Assigns the rank value to the lead

Related Topics

- Lead Assignment Rules
- Lead Ranking

Partner Assignment

Overview of Assigning Territories to Partners

Companies can have thousands of partners, so being able to quickly give users access to partner accounts and to the leads and opportunities for those accounts is very helpful. You can use territory assignment to perform this task.

The available assignment types are:

- Batch assignment
- Manual assignment

You can use the following methods to determine assignment:

- Partner Account Belongs To: For attributes used to match against partner-centric coverage territories
- Partner Account Serves To: For attributes used to match against sales account-centric coverage territories.

You must be on the partner team with full access and have the Partner Account Maintenance or Administration Duty role to perform manual and batch assignment.

All members of the internal territory, including owner and resources, have full access to the partner information. Users with Partner Account Maintenance Duty or Partner Account Administration Duty can view territories assigned to a partner account.

Batch Assignment

After partners are imported, partner accounts created in an import batch can be assigned using view criteria with the Assign Territories to Partner Account assignment process. After territories are realigned, partner accounts that are affected by the realignment are reassigned.

During the initial implementation, partner accounts can be created before any territories have been set up (for example, as part of a migration). These accounts don't receive a territory assignment because no territories exist yet. They must be explicitly assigned after territories are created. In this case, it's recommended that you run a batch assignment using the view criteria "PartnersInABatchNeedingReassignment" to assign these accounts to territories.

Manual Assignment

For manual assignment, use the Assign Territories action available in the Edit Partner page. You must have the Partner Maintenance Duty for the partner to use this action.

When you click the Assign Territories action, assignment processing begins and it returns a list of territories matching the partner. You can save this list and make the assignment, or cancel and make no changes to the existing assigned territories.

Related Topics

- Assign Territories to Partners with Batch Assignment

Assign Territories to Partners with Batch Assignment

This topic explains how to assign territories to partners using batch assignment.

Configure Batch Assignment

The following table shows the view criteria names and some example bind variable values to use when configuring batch assignment.

View Criteria Name	Bind Variable Value
PartnersOfAStatus	BindStatus=ACTIVE
PartnersCreatedInLastNDays	BindNumberOfDays=1
PartnersUpdatedInLastNDays	BindNumberOfDays=2
PartnersImportedInABatch	BindImportBatchId=11001
PartnersInACountry	BindCountryCode= For example, the BindCountryCode for the United States is US.
PartnersBelongingToAnIndustry	BindIndustryBelongedTo=1000 Where 1000 is Industry Classification code.
PartnersWithAProductDim	BindProduct=Education
PartnersWithAGeographyDim	BindGeographyServed=Netherlands
PartnersWithIndustryDim	BindIndustryServed=Life Sciences

1. From the Tools area in Navigator, select **Scheduled Processes**.
2. On the Scheduled Processes page, click **Schedule New Process**.
3. On the Schedule New Process dialog box, click the drop-down arrow next to **Name** and then click the **Search** link.
4. On the Search and Select: Name dialog, type **Assign** in the **Name** field and click **Search**.
5. Select **Assign Territories to Partner Account** from the returned list and click **OK**.
6. Click **OK** on the Schedule New Process dialog.
7. On the Process Details page, enter View Criteria Name and View Criteria Bind Values, then click **Submit**.

8. The Scheduled Processes page appears. Notice that the Status is Scheduled. You can click the **Log** link to see the log.

Overview of Manually Assigning Partners and Partner Sales Credits in Opportunities

You can manually add partners to or remove partners from the opportunity team. You also can assign nonrevenue sales credit to partners in opportunities. Partner assignment and sales credit allocation follow specific rules.

Partner Assignment to Opportunities

Note the following behavior for partner assignment to opportunities:

- Partner resources cannot be removed from the opportunity team if they are receiving non-revenue credit on the opportunity. To remove a partner, you must first remove the credit allocations he is assigned.
- When a partner organization is removed from the opportunity, and no resource from that partner organization is receiving sales credit on the opportunity, all partner resources, if they exist, are automatically removed from the opportunity team.
- Territories of type Partner or Partner Program are not assigned to opportunities.
- The resources list of values only displays partner resources whose partner organization is already associated with the opportunity.

Sales Credits and Partners

Note the following behavior for partners receiving sales credit:

- Partner resources are only eligible to receive non-revenue credit on opportunity revenue.
- When selecting sales credits for partner resources, only partner resources whose partner organization is associated with the revenue line are eligible for sales credits.
- Partner resources are not eligible for deal protection.

Assignment Reports

Example of Generating Assignment Reports

You can use the Diagnostic Dashboard to generate the following reports:

- Batch Assignment Progress Report
- Batch Assignment Error Report
- Territory Dimension Data Report

This topic explains how to generate a batch assignment progress report, as an example.

Prerequisite: As a user with access to the Schedule Processes UI, such as the sales administrator, click **Navigator**, and then click **Scheduled Processes** within the **Tools** heading. Run the batch assignment processes for sales accounts and opportunities. See the topics, Recommendations for Assignment Processes for Opportunities, and Schedule Account Assignment, for more information.

You must have the required job or duty roles to run diagnostic reports from the Diagnostic Dashboard. The setup user created for you by the service is automatically provisioned with the required job role, Application Diagnostics Administrator (which contains the required duty roles). Therefore, you can use this setup user (or another user that you create and provision with this job role) to run the diagnostic reports. For details on how to add the duty roles to an existing user, see DOC ID 1374930.1 on My Oracle Support (support.oracle.com). This article describes how to assign user access to the Oracle Fusion Applications Diagnostic Dashboard.

Batch Assignment Progress Report

This section describes a scenario for running the batch assignment progress report. It takes you through generating a batch assignment report and viewing the completed report.

Here's how to generate the batch assignment progress report:

1. Sign in as a user who has access to the Diagnostic Dashboard.
2. Click your user image or name in the global header.
3. Click **Run Diagnostics Tests**, within the **Troubleshooting** area.
4. On the Diagnostic Dashboard page, search for the report name you want to run. In this example, search for **Batch Assignment Progress Report**.
5. Select **Batch Assignment Progress Report** and click **Add to Run**.
   The Batch Assignment Progress Report is added in the **Choose Tests to Run and Supply Inputs** region.
6. Click the warning icon in the **Input Status** column, and enter the parameters in the **Input Parameters** page that appears.
7. Click **OK**.
8. In the **Choose Tests to Run and Supply Inputs** region, enter a name in the **Run Name** field and click **Run**.
9. In the **Confirmation** dialog box, click **OK**.
   The status of the report appears in the **Diagnostic Test Run Status** region.
10. Click the completed report to open the report page.

You can now use the report for your analysis. You can follow the same procedure to generate the Batch Assignment Error Report and the Territory Dimension Data Report.

What is a Batch Assignment Progress Report?

You can generate a batch assignment progress report to show you a variety of details about your assignment processes.

The batch assignment progress report indicates the number of records processed, unprocessed, successful or failed, and the number of records processed per minute for a process. The report provides details of assignment processing for multiple batch assignment processes and their sub-processes. You can run this report while a batch assignment process (accounts, leads, opportunities, revenue, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment progress report. The report includes two tables, one with details of the main process, followed by details of the sub-processes. The second table with sub-processes appears only if the **Include Sub Process** parameter is set to **True**.

Input Parameters

The report has the following input parameters:

Input Parameter	Description
Parent Process ID	Identifiers for the parent scheduled processes. You can enter multiple process IDs.
From Date	Select the start date.
To Date	Select the end date.
Include Sub Processes	Select **True** to include sub-processes. The default value is **False**.

Example Report

Here is an example of a batch assignment progress report, along with description of what each value means:

Column	Sample Value	Description
Parent Process ID	504	Identifier for the scheduled process
Work Object	SalesAccount_Work_Object	Code for the work object
Candidate Object	SalesAccountTerritory_Candidate_Object	Code for the candidate object
Submitted By	Sales_admin	User name of the person submitting the process
Process Status	Running	Status of the process, such as, Not Started, In Progress, or Canceled
Process Start Time	11/19/12 8:48 PM UTC	Start Time of the process. Shows date, hours, and minutes
Process End Time	11/19/12 8:56 PM UTC	End Time of the process. Shows date, hours, and minutes
Process Elapsed Time (Minutes)	22	Number of minutes the process has been running
Records per Minute	10.46	Number of records processed per minute
Number of Sub Processes	10	Number of sub-processes launched from the parent process

Column	Sample Value	Description
Number of Records	100000	Number of records in the process
Number Not Processed	94452	Number of records not yet processed
Number Successful	5542	Number of records successfully processed
Number Failed	6	Number of records failed
Failure Rate	0.00006	Number of failures divided by the Number of items
Assignment Elapsed Time	21.45	Number of minutes the assignment processing has been running
Records Processed Last 10 Minutes	12.63	Number of records processed in the previous 10 minutes
Number of Retries	0	Number of times the process has been resubmitted

You can also use the report to estimate the time it will take to complete a batch assignment process. This report provides details on the number of records completed and the number of records in progress. You can generate this report repeatedly to conduct performance analysis of the batch assignment processing.

Related Topics

- Example of Generating Assignment Reports

What is a Batch Assignment Error Report?

Use assignment management functionality to generate batch assignment error report. The batch assignment error report provides details of the error and warning messages generated while processing individual records during batch assignment process.

The report provides a summary of the test input parameters and message details for each record that meets the input parameters. You can run this report while a batch assignment process (accounts, leads, opportunities, revenues, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment error report. The report shows the test parameters followed by two results tables. The first table provides a summary of the process, and the second table shows details of the records that meet the criteria entered when running the report.

Report Parameters

Here's a description of the input parameters used to generate the batch assignment error report.

Input Parameter	Description
Parent Process ID	Identifier for the parent ESS process. You can enter only a single process ID.
Assignment Status	Enter the status of the assignment, such as, error, succeeded, and so on. The default is error.
Work Object Public Unique Identifier	This is optional. The value that you enter here will depend on the Identifier Attribute of the work object being processed in a batch.
Range of Records	Enter the range of records in a process to report. The default value is the value set in the MOW_DTF_ERROR_REPORT_MAX_LIMIT profile option. You can change this profile option value in the Manage Administrator Profile Values setup task.

Example Report

Here's an example of the Process Summary section of a batch assignment error report:

Process Summary

Work Object	Candidate Object	Start Time	End Time
SalesAccount_Work_Object	SalesAccountTerritory_Candidate_Object	2013/2/11 12:13	2013/2/11 02:45

Here's an example of the Process Details section containing the records that meet the criteria entered when running the batch assignment error report:

Work Object Public Unique Identifier	Assignment Status	Message Details
1243213	Successful	Not applicable.
1728224	Error	225030 MOW_AMENG_AO_ASSERT_ FAILED An error occurred while loading assignment object Sales_Account_Work_object. There's a mismatch between the view object definition in the assignment configuration and the actual view object definition used during assignment processing. Update and save the assignment object to register it with the latest view object definition.
1982663	Successful	Not applicable.
2392053	Successful	Not applicable.

Use the batch assignment error report to check if there were errors in the batch assignment process and if a particular work object record was processed.

Related Topics

- Example of Generating Assignment Reports

Example of Running Lead Batch Assignment in Diagnostic Mode

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running lead batch assignment in diagnostic mode.

Running Batch Assignment

A sales representative of a company has to follow up on a lead but the lead hasn't yet been assigned to his territory. He has requested you, the sales administrator, to investigate the details of territory assignment. You can provide these details by running lead batch assignment in diagnostic mode.

1. Go to **Navigator**, and then select the **Lead Qualification** menu item.
2. Select **Lead Processing Activities** on the **Tasks** pane.
3. On the Lead Processing Activity page, click the **Create Lead Processing Activity** button.
4. On the Create Lead Processing Activity page:
    a. Select **Assignment** from the **Process Type** list.
    b. Enable diagnostic mode by checking the **Diagnostic Mode** check box.
    c. Search and select a lead. Note down the lead number value to use in a later step.
    d. Select **Immediate** from the **Schedule** list.
    e. Click **Submit**.
5. On the Confirmation dialog box, click **OK**.

    Two process are submitted, one for lead territory assignment and the other for lead rule-based (or resource) assignment. Note down the identifier of the territory or resource assignment processes you're interested in.
6. Click the Refresh icon until the process has completed successfully or with an error.
7. Select the appropriate territory or rule-based assignment process, and then click the Output log icon in the **View Log** column to view details.

Open the log file in another browser window or tab.

> **Note:** The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the file may be difficult to read.

View the log file for details of the assignment processing for the selected lead. You can use the lead number recorded earlier to search in the log file. Review the file for details of the assignment processing.

Related Topics

- Batch Assignment Diagnostic Log

Example of Running Opportunity Batch Assignment in Diagnostic Mode

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running opportunity batch assignment in diagnostic mode.

Run Batch Assignment

A sales representative of a company has to follow up on an opportunity, but the opportunity hasn't been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running opportunity batch assignment in diagnostic mode.

1. Go to **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Request Revenue Territory Assignment process.
5. Select the **Request Revenue Territory Assignment** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the parameter values as shown in the following table:

Parameter	Value
View Criteria Name	FilterByOptyNumber
View Criteria Bind Values	BindOptyNumber=XXX, where XXX is the opportunity number
Diagnostic Mode	Select the check box.

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser or tab.

> **Note:** The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

Related Topics

- Batch Assignment Diagnostic Log

Example of Running Account Batch Assignment in Diagnostic Mode

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running account batch assignment in diagnostic mode.

> **Note:** Account batch assignment is usually run in diagnostic mode to find why an account isn't assigned to a territory. For any view criteria applied in the diagnostic mode, the diagnostic will only be run for one account.

Run Batch Assignment

A sales representative of a company is due to meet with a new account he's now responsible for, but the account hasn't been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running account batch assignment in diagnostic mode.

1. Go to **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Request Account Assignments process.
5. Select the **Request Account Assignments** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the parameter values as shown:

Parameter	Value
Work Object	SalesAccount_Work_Object
Candidate Object	SalesAccountTerritory_Candidate_Object
Assignment Mode	Territory
View Criteria Name	RegistryIDVC
View Criteria Bind Values	RegistryIDs=XXX where XXX is the party number (also known as registry ID
Diagnostic Mode	Select the check box.

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser or tab.

Note: The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

Related Topics

- Batch Assignment Diagnostic Log

Example of Running Partner Account Batch Assignment in Diagnostic Mode

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running partner batch assignment in diagnostic mode.

Run Batch Assignment

A channel account manager of a company is due to meet with a partner account he's now responsible for, but the partner account hasn't been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running partner account batch assignment in diagnostic mode.

1. Go to **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Assign Territories to Partner Account process.
5. Select the **Assign Territories to Partner Account** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the parameter values as shown in the following table:

Parameter	Value
View Criteria Name	QueryByCompanyNumber
View Criteria Bind Values	BindCompanyNumber=XXX where XXX is the partner number
Diagnostic Mode	Select the check box.

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.

11. Open the log file in another browser or tab.

> **Note:** The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

Related Topics

- Batch Assignment Diagnostic Log

Batch Assignment Diagnostic Log

When you run batch assignment in diagnostic mode, an output log is generated with details of the assignment processing. You can use these details to troubleshoot any issues with territory assignment.

The log helps you understand why certain leads or opportunities weren't assigned to your territories as expected. This table provides an example of a lead batch assignment diagnostic run of territory-based assignment with rule filtering for a lead. It includes an explanation of each section of the log.

> **Note:** Use the search feature in your log file to search on keywords, such as the error message number, for example 225203, to locate a specific section.

Example Log File Entries	Description
The assignment processing is in diagnostic mode. Assignment results won't be stored. The following number of work objects will be processed: 1.	Provides a summary of the assignment processing and the number of work objects to be processed. You can change the number of work objects allowed to be processed in diagnostic mode through the MOW_DIAG_MODE_WO_LIMIT profile option. The default setting is 1.

The process 63034 started at time Wed, July 13 05:48:54 and is processing the following number of work objects: 1.
 	
Work Object = Lead_Work_Object_Lead
 	
Candidate Object = Territory_Candidate_Object_Lead
 	
Assignment Mode = Territory
 	
View Criteria Name = LeadAssignmentDiagnosticVC
 	
View Criteria Bind Values = BindLeadNumberDiag= 108970
 	
Rule Category Name = ORA_Sales_Lead_Territory_Rule_Category
 	
Replace Team = true
 	
Maximum Sub Processes per Process = 10
	Lets you confirm the objects being processed in this batch, for example territories being assigned to leads, the type of assignment processing, and the other parameters and their values relevant for this batch process. Indicates the following:
	
	• The process has started.
	• Work object being processed and the candidates being found.
	• Type of assignment processing:
	  ◦ Territory is territory assignment
	  ◦ Matching is assignment using rules
	  ◦ Score is scoring
	  ◦ Classification is ranking or qualification
	• View criteria and bind value in leads which determine the set of leads that are included in this batch assignment process.
	• Diagnostic mode setting.

Example Log File Entries	Description
Metric Logging Interval = 0 Test Data Parameters = Diagnostic Mode = true	
Matching request for work object Lead_Work_Object_Lead with the identifier 108970 and candidate object Territory_Candidate_Object_Lead is in process. (MOW-225169) Geography Identifier = 4,Customer Primary Address=310 Park Ave SE Ste 2c5,OLYMPIA, WA 98504-0001 Party ID = 999997551079430 Lead Number = 108970 Customer ID = 999997551079430 Industry Classification code= 2900 Organization Size = VERY_SMALL Organization Type = null Geography Identifier = 15 Custom Account Indicator = null Account = A. C. Network (Olympia, US) Sales Account Type = NAMED Sales Channel = ZPM_DIRECT_CHANNEL_TYPES OrgTp,Classification Code = A: PS-SL; T: PS-SL Primary Partner Identifier = null Acct,Customer ID = 999997551079430 Prospect Account Indicator = null Sales Account Indicator = Y Auxiliary Classification Code 2 = OFN1 Auxiliary Classification Code 3 = LANG-12113 Industry Classification Code = 2900 Auxiliary Classification Code 1 = CORPORATION Named Sales Account = Y	Provides a summary of the active assignment attributes and their values that will be used in the processing of this lead. Only a subset of these attributes may be used in the assignment processing of a lead, for example lead ranking rule may only use the score and time frame attributes. • Values for the work object. • Attributes that are null. • Attributes that indicate the type of lead being processed. For example, Sales Account Indicator = Y Use this information to confirm the data values for the work object that may be used in the assignment processing.

Example Log File Entries	Description
Score = null	
Assignment matching using mapping set Mapping Set 1 is in process. (MOW-225185) Assignment mapping values were retrieved. (MOW-225211) Function Code = Geo,Geography Identifier = 4,Customer Primary Address = 310 Park Ave SE Ste 2c5,OLYMPIA, WA 98504-0001 Function Code = CSize,Organization Size = VERY_SMALL Function Code = AcTyp,Sales Account Type = NAMED Function Code = Indst,Industry Classification Code = 2900 Function Code = Acct,Customer ID = 999997551079430 Function Code = OrgTp,Classification Code = A: PS-SL; T: PS-SL Function Code = SChnl,Sales Channel = ZPM_DIRECT_CHANNEL_TYPES	Shows the active assignment mappings that drive territory-based assignment for this lead. Also shows the value for each mapping. If an unexpected territory or set of territories has previously been assigned to the work object, then confirm that this is the information you expected to be used for this lead.
Assignment mapping values were translated to sequence values. (MOW-225212) Function Code = CSize,Translated values = (7,7) Function Code = Indst,Translated values = (26,26) Function Code = SChnl,Translated values = (1,5) Function Code = Acct,Translated values = (999997551079430) Function Code = AcTyp,Translated values = (1,1) Function Code = Geo,Translated values=(4, WA),(999984000001036,Pacific),(999984000001009,West),(1,United States),(999984000000008,North American Sales),(999984000000004),(ANY) Function Code = Prod,Translated values = (1,999999999999999)	This section is relevant for Oracle Support to troubleshoot assignment issues.

Example Log File Entries	Description
Function Code = OrgTp,Translated values = (77,77)	
Candidate matches were identified. Post processing is in progress. (MOW-225210) The territory with the attribute name Territory Number and attribute value 5377182 was deleted because it's a parent. (MOW-225209) The territory with the attribute name Territory Number and attribute value 282312 was deleted because of an exclusion. (MOW-225208)	Indicates that matching candidates were found and lists the matching candidates that were dropped since they're either parent candidates or part of excluded territories. If this lead was assigned previously and the territory you expected wasn't assigned, then review this list of dropped territories. The territory might have been dropped because it was a parent territory and a lower level territory under this also matched. Alternatively, this territory might have been excluded for this lead (for example, a partner might have rejected this lead) or the territory might have an exclusion coverage that contains the account on this lead.
The final matching candidates for mapping set Mapping Set 1 were identified. (MOW-225207) Territory Number = 83,Territory ID = 100000013157305 Territory Number = 473,Territory ID = 100000013157417 Territory Number = 69095,Territory ID = 100100051383477 Territory Number = 496,Territory ID = 300100003212620 Territory Number = 95,Territory ID = 300100003282208 Territory Number = 45,Territory ID = 300100004466888 Territory Number = 233,Territory ID = 300100004466906	Shows the final list of matching territories.
Matching request for work object Lead_Work_Object_Lead with the identifier 142802 and candidate object Territory_Candidate_Object_Lead is in process. (MOW-225169) Assignment processing using rule set RS12 is in progress. (MOW-225202) Candidate matches were identified. Post processing is in progress. (MOW-225210) The final matching candidates for rule set RS12 were identified. (MOW-225201) The following number of candidates was returned for the matching request for work object Lead_Work_Object_Lead with the identifier 142802: 63. (MOW-225170)	If territory-based assignment with rule filtering was used, this section shows the rule set processing.

Example Log File Entries	Description
The assignment of the following number of candidates to work object Lead_Work_Object_Lead with the identifier 142802 is in process: 63. (MOW-225167)	
The existing candidates were identified. (MOW-225200) Territory Number = 335 Territory Number = 274 Territory Number = 32 The following number of existing candidates were removed from the work object Lead_Work_Object_Lead with the identifier 142802: 13. (MOW-225181) Territory Number = 274 Territory Number = 32 Territory Number = 220 Assignment disposition for work object Lead_Work_Object_Lead with the identifier 142802 is complete. (MOW-225166)	If the lead was previously assigned, this section shows the existing territories as well as shows any territories that no longer match and therefore are going to be removed from the lead.
The lead assignment post processing has started. The lead reassign value is set to N and assignment status is set to Assigned as part of lead assignment post processing. The lead last assignment post processing date and time is set at 2016-08-11 06:31:09.0. The lead assignment post processing has been completed.	Shows the leads post processing information, such as lead reassigned indicator is set to No, and that the last assigned date and time is set.
Assignment matching using mapping set Mapping Set 2 is in process. (MOW-225185) The mapping set Mapping Set 2 was skipped as the conditional attribute Primary Partner Identifier is blank. (MOW-225206)	Shows the progress of assignment matching for a mapping set. In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 2) has a conditional attribute defined. For this lead, this attribute doesn't contain a value, and so the territory matching for this mapping set isn't needed and therefore isn't performed.
Assignment matching using mapping set Mapping Set 3 is in process. (MOW-225185)	Shows the progress of assignment matching for a mapping set.

Example Log File Entries	Description
The mapping set Mapping Set 3 was skipped as the conditional attribute Prospect Account Indicator is blank. (MOW-225206)	In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 3) has a conditional attribute defined. For this lead, this attribute doesn't contain a value, and so the territory matching for this mapping set isn't needed and therefore isn't performed.
Assignment matching using mapping set Mapping Set 4 is in process. (MOW-225185) The mapping set Mapping Set 4 was skipped as the conditional attribute Custom Account Indicator is blank. (MOW-225206)	Shows the progress of assignment matching for a mapping set. In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 4) has a conditional attribute defined. For this lead, this attribute doesn't contain a value, and so the territory matching for this mapping set isn't needed and therefore isn't performed.
Assignment matching using mapping set Mapping Set 5 is in process. (MOW-225185) The mapping set Mapping Set 5 was skipped as the conditional attribute SimlifiedLeadFlag is blank. (MOW-225206) **Note:** A sales lead is one where an existing account and contact is associated to the lead. A simplified lead is one where the lead has either a new account or a new contact associated with it. When the flag SimlifiedLeadFlag is set to Yes for a simplified lead, this means the **Mapping Set 5** becomes active.	Shows the progress of assignment matching for a mapping set. In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 5) has a conditional attribute defined. For this lead, this attribute doesn't contain a value, and so the territory matching for this mapping set isn't needed and therefore isn't performed.
The total number of work objects processed: 1. Number of work objects successfully processed: 1. Number of work objects failed: 0. (MOW-225127)	Provides summary of how many work objects were successfully processed and how many failed.

Related Topics

- Example of Running Lead Batch Assignment in Diagnostic Mode

Run Diagnostic Test for Territory Data Used by Assignment Manager

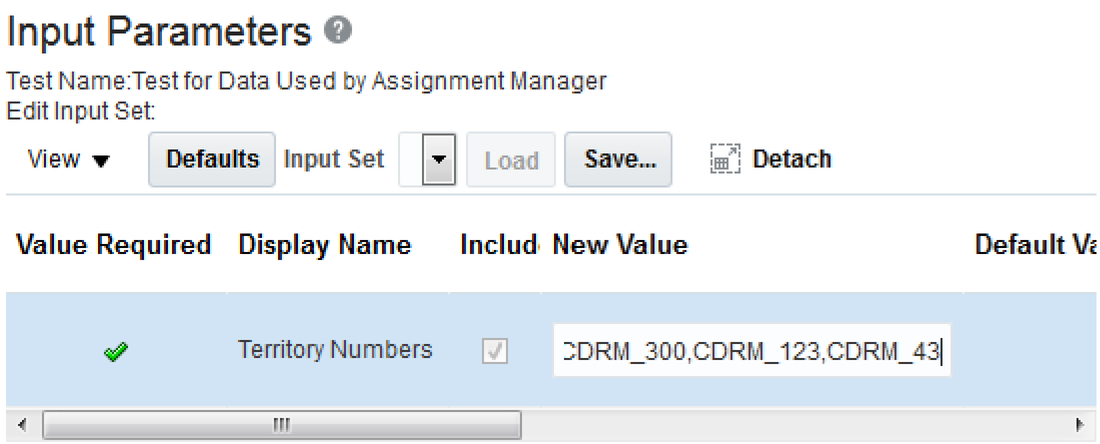
You can use territory management to generate a report that shows the dimension and sequence details for territory dimensions defined for territories. Review the report to troubleshoot issues in territory assignment processing.

This topic explains how to run and generate this report, and shows an example of the report.

Run and Generate the Diagnostic Test Report

Here's how to run diagnostic test for territory data used by assignment manager:

1. Navigate to Territories.
2. Find the territories whose data you want to view and note down the territory numbers.
3. Click the **Run Diagnostic Tests** link from the **Settings and Actions** list.
4. On the Diagnostic Dashboard, search for **Test for Data Used by Assignment Manager** in the **Test Name** field.
5. Select the test and click **Add to Run**.
6. Click the Warning icon to enter the parameters.
7. On the Input Parameters dialog box, enter the parameters in the **New Value** field as shown in the following figure.



> **Note:** If you're running the report for multiple territories, enter the territories without spaces. For example, `CDRM_300,CDRM_123,CDRM_43`. If you enter spaces, the report is run only on the first territory.

8. On the Choose Test to Run and Supply Inputs dialog, enter the **Run Name** and click **Run**.
9. On the Test Run Submitted dialog box, click **OK**.
10. On the Diagnostic Test run Status, click the Report icon on the relevant report row.
11. Review the report details.

For further assistance with troubleshooting, share the report with Oracle Support, along with the assignment diagnostic log files.

About Purging Batch Assignment Information

When a batch assignment job runs, it creates data as part of the assignment process. Once the job completes, the data is no longer required and can be purged.

The scheduled process **Purge Batch Assignment Information** is used to purge the batch assignment tables based on set parameters. A batch assignment process creates data in two tables: MOW_BATCH_ASGN_JOBS and MOW_BATCH_ASGN_JOB_ITEMS. With time, records in these tables grow substantially, especially with large implementations. The purge batch assignment information process clears old records for successfully completed processes. The process purges data for batch assignment processes for leads, opportunities, accounts, and so on.

Run this process periodically or as needed. The process has only one parameter **Days to Keep**. The default value is 30.

Specify the number of days worth of assignment batch job and data to keep until the next purge. For example, if you set the parameter to 15, the process removes all rows related to successfully completed processes in the batch assignment data table that were created before 15 days from the current date.

Territory Dimension Data Report

The territory dimension data report identifies the volume of territory data for each territory dimension and coverage type. You can use information from this report to determine the sequence for each assignment mapping and optimize assignment performance.

You must run this report only after you have created and activated your production territories.

Access the Diagnostic Dashboard to generate the territory dimension data report. The report shows the number of denormalized customer account-centric and partner-centric territory records for each territory dimension and coverage type. The function code field is used to specify a unique identifier for the attribute. Where dimensional territory coverage isn't defined, the report shows the counts for inherited customer and partner inclusions and exclusions that are manually defined.

This table shows an example of a territory dimension data report:

Function Code	Count for INCLUSION	Count for EXCLUSION	Count for PARTNER_ REGULAR	Count for REGULAR
AcTyp	7	3	16	305
Acct	0	0	16	313
Aux1	7	3	16	385
Aux2	7	3	16	385
Aux3	7	3	16	385
CSize	7	3	13	336
Geo	7	3	2	4
Indst	7	3	14	268
OrgTp	7	3	14	374
Prod	2	3	16	171
Prtnr	7	3	16	385

Function Code	Count for INCLUSION	Count for EXCLUSION	Count for PARTNER_ REGULAR	Count for REGULAR
Schnl	7	3	16	259

Once the report is generated, you must identify the sequence of mappings as follows:

1. Copy the report to a spreadsheet.
2. Sum up the count for inclusion, exclusion, partner_regular, and regular for each function code.
3. List the function codes in order from lowest total count to highest.

After you list function codes from lowest count to the highest, the report table should look like this:

Function Code	Count for INCLUSION	Count for EXCLUSION	Count for PARTNER_ REGULAR	Count for REGULAR	Total Count
Geo	7	3	2	4	16
Prod	2	3	16	171	192
Schnl	7	3	16	259	285
Indst	7	3	14	268	292
Acct	0	0	16	313	329
AcTyp	7	3	16	305	331
CSize	7	3	13	336	359
OrgTp	7	3	14	374	398
Aux1	7	3	16	385	411
Aux2	7	3	16	385	411
Aux3	7	3	16	385	411
Prtnr	7	3	16	385	411

With this information, you can now update the sequence for each assignment mapping. The function code with the lowest total count, Geo in this example, should be updated to have the sequence 1. The next lowest total count, Prod in this example, should have sequence 2, and so on. You must update the sequence similarly for every mapping in each mapping set, for every work-object and candidate-object combination.

Related Topics

- Example of Generating Assignment Reports

FAQs for Assignment

Frequently Asked Questions (FAQs) for Assignment

This section contains the most frequently asked questions (FAQs) when setting up Assignment. Scroll or search to find answers to common questions.

What's the difference between rule-based and territory-based assignment?

Territory-based assignment is the primary means of assignment for your sales application objects, such as accounts, leads, and opportunities. For territory-based assignment, while creating the assignment object, you create work object to candidate object mapping sets that are used to make candidate assignments.

You can use rule-based assignment to identify supplemental resources or filter the matching territories. You can also use rules to score work objects and for classification. For rule-based assignment, you use the rules editor to create expression-based rules that the assignment feature uses to make candidate assignments.

In a territory-based assignment scenario, you typically create a mapping set between a work object and a candidate object to make the appropriate candidate assignment. This mapping set can consist of one or more mappings between the work object attributes and the territory candidate object attributes.

In a rule-based assignment scenario, you create rules with conditions that must be met to make the appropriate resource assignments. For example, a rule is created with the condition that when the opportunity risk level is high, a resource located in the state of California is assigned.

Related Topics

- What types of assignment rules can I create?

What happens if I mark an assignment object or one of its attributes as inactive?

When you mark an assignment object as inactive, the selected work or candidate assignment object isn't available for assignment processing. When you mark an assignment attribute as inactive, the selected work or candidate object attribute isn't available for assignment processing.

> **Note:** The object or attribute can't be set to inactive if there is a mapping set, mapping, or rule defined using the object or attribute.

How can I display workflow notifications for Assignment Manager batch process jobs?

You can display object workflow notifications for assignment manager batch jobs to alert you of job completions for your specified assignment manager objects.

Change the Suppress Events for Assignment Processing in Batch Mode (ORA_MOW_ASGN_SUPRESS_EDN_EVENTS) profile option value to N at both the site and product levels for your selected sales objects. This profile option applies only to email notifications that are sent as part of Assignment Manager workflow tasks. Bell notifications aren't affected. The current value is set to Y which hides all batch assignment process workflow notifications.

You can choose to turn on or off this profile option at the product level. For example, you might want to have workflow notifications for all Opportunity batch assignment jobs but want to hide all notification for batch Account assignment jobs. Note that the workflow notifications can't be suppressed if the assignment is processed using the Run Assignment option from the UI.

When are territories assigned to accounts?

Internal territories are assigned to accounts in these cases:

- When accounts are created.
- When a sell-to address is added to an existing sales party.
- When accounts are imported in bulk.
- When certain attributes on accounts that correspond with territory assignment dimensions are updated.
- When batch assignment is run.
- When you select the Assign Territories menu action on the Sales Account Team node for the account
- When territories are realigned or when personnel leave the territory or the company.
- When a sales manager reassigns all the sales representative's account to a different owner that triggers the reassignment of territories for those accounts to the new owner.

> **Note:** These profile options decide whether territory assignment and reassignment is automatic for accounts. The default setting for both is YES.
> - Sales Account Automatic Assignment on Create Enabled
> - Sales Account Automatic Assignment on Update Enabled

Automatic assignments are always enabled following an import, party merge, or territory realignment.

During initial implementation and migration, it's possible to create accounts before territories have been set up in the application. These accounts won't receive any territory assignment because there are no territories. These accounts need to be explicitly assigned when territories are configured and activated in the application. This is one exception which doesn't have immediate/automatic assignment. The recommendation is to run a batch assignment to assign these accounts created at the beginning of the implementation using the view criteria `SalesAccountsUpdatedSinceVC`.

When you make a field conditionally required on an account, then add the following Groovy script before adding your business logic:

```
if (userName=='FUSION_APPS_CRM_SOA_APPID'|| userName()=='FUSION_APPS_CRM_ESS_APPID')
return false
```

Partner territories get assigned to accounts in the following scenarios.

- When a partner-generated lead is approved, all partner territories associated with the partner-generated lead are automatically assigned to the account.
- Users with the privilege Manage Sales Party Partner Territory can assign partner territories from the account team UI.

Note: Territory Management must be implemented to use this feature.

Related Topics

- Sales Territories and Assignment

How can I add territories to an account?

Sales assignment capabilities match territories and accounts based on assignment setup. An account can also be assigned to one or more internal and partner territories.

You can assign internal territories, such as Prime, Overlay, as well as Sales Channel Manager territories, matching a given account's assignment attributes, to the account. By default, Internal territory assignment runs immediately and automatically whenever account assignment or reassignment is required. For example, you can run assignment processing when you create or update an account.

You can run territory assignment when viewing or editing your accounts. Just navigate to your account details, verify relevant attributes like address, industry, and so on, and run the assignment process manually using the Actions button.

Additionally, you can run account assignment in a batch on a scheduled or one off basis, or following a territory realignment.

Partner territories are applicable to sales partner management implementations. When you approve a partner lead, any partner territories associated to the lead are automatically assigned to the lead's account. Channel managers can also select specific partner territories to assign to an account with the Add Partner Territories action on the Account Team page.

Note: You can also enable automatic assignment of imported accounts. See the related topics for more information.

Related Topics

- When are territories assigned to accounts?
- Schedule Account Assignment
- How Dimensions Define Territories

Can I use Rule-Based Assignment (RBA) to assign resources for Accounts?

No, rule based resource assignment for Accounts isn't supported. Rule-based assignment can be used to assign resources to opportunity and lead teams.

Use territories to assign resources and secure access to accounts. Alternatively, create custom access groups and add resources as members, and then define the rule or rules that assign an access group to each account.

Why is my Territory assignment job taking more time than usual to complete?

The time taken by a job depends on the number of records affected in an assignment. The job may run slow due to the latest changes in the territories that caused more accounts to be eligible for re-assignment.

Always run the full assignment after making territory changes and allow the job to complete. The first run with a full assignment may take a long time. However, the subsequent runs end faster than the initial full assignment run.

How are territories assigned to opportunities?

You can't explicitly add territories to an opportunity. Rather, the assignment engine automatically assigns territories to opportunity product lines by matching the dimensional attributes of product lines to territory dimensions, such as Customer Size or Industry.

When the assignment engine assigns territories to opportunity product lines, the territory owner is also copied to the opportunity team.

Profile options set by the administrator determine the following:

- Whether, when a territory is assigned to an opportunity product line, all territory team members are also copied to the opportunity team, in addition to the territory owner.
- Whether the assign opportunity action is available from within an opportunity for salespeople to run assignment.
- Whether the application runs assignment when salespeople save an opportunity.

> **Note:** With partner integration, partner territories (territories whose sales channel dimension is equal to Partner) aren't assigned to product lines. Partner organizations can only be associated with an opportunity manually, or they can be automatically associated through an approved lead registration.

Related Topics

- About Sales Resources and Opportunity Assignment
- Overview of Territory Account Assignment

How do I assign team members automatically to an opportunity?

While editing an opportunity, from the Actions menu, select Save and Run Assignment.

You must have Full access to the opportunity to see the Save and Run Assignment action.

> **Tip:** You can view assigned territories and the associated territory team members on the opportunity team in the opportunity Team pages.

Related Topics

- Why can't I assign an opportunity?

How can I manually add territories to an opportunity?

You can manually assign territories to one or more additional salespeople on a product line in order to allow another salesperson working the deal to forecast it in his territory.

Manual assignment may be required, for example, to even out a temporary unbalanced load between salespeople reporting to a manager, or to accommodate a salesperson on extended vacation. You manually assign territories in the assign sales credit screens or in the details of the revenue line by using the territory list of values.

You must have the Sales Administrator job role to perform manual territory assignment on opportunities.

Which fields in an opportunity drive assignment?

The following fields drive opportunity assignment: Account, Sales Channel, Product, and Partner (for assigning partner-centric territories).

Other, peripheral, account and partner attributes also drive assignment, but aren't captured or displayed in the opportunity. Examples of these other attributes include: Primary Address (Geography), Named/Not Named (Account Type), Industry, Organization Type, Partner Type, Organization/Customer Size, and the Auxiliary 1-3 Classifications.

Why can't I assign an opportunity?

You must have Full permission on an opportunity to see the Save and Run Assignment action.

Note that a profile option determines whether the assignment action is available in opportunities.

Related Topics

- How do I assign team members automatically to an opportunity?

What's lock assignment?

The Lock assignment check box is automatically selected when you run a manual assignment from the UI. Lock assignment prevents a salesperson from being automatically removed from an opportunity through the assignment engine.

Only users with Full access on the opportunity can select or deselect the Lock Assignment check box for sales team members. Resources are assigned automatically to an opportunity during an automatic assignment process or through a groovy script.

When the lock assignment is selected, an automatic territory assignment can't remove any sales account team resources or team members. If the lock assignment is deselected, team members may be replaced if they no longer match the assignment rules.

> **Note:** The Lock Assignment check box is not available by default and must be added to the Team subtab within the Edit Opportunity page using Application Composer. See the next section for more information.

Extending Pages for Opportunities Using Application Composer

1. In a sandbox, navigate to **Configuration** > **Application Composer**.
2. In the object tree, select **Opportunity** > **Pages** > **Application Pages**.
3. Go to the Create Opportunity page and duplicate the standard layout.
4. Edit the layout.
5. In the Configure Detail Form region of the Opportunity Create page, move the Lock Assignment field from the Available Fields to the Selected Fields list.
6. Save your changes.
7. Publish the sandbox according to your company's business practices.

What's deal protection?

With the deal protection feature, all salespeople are automatically protected from being removed from a product line for which they're receiving sales credit, or from the opportunity team, when territory realignment happens.

Deal protection applies to sales resources that get automatically assigned to product lines as credit recipients or to the opportunity team using territory-based assignment.

A profile option set by the administrator specifies the default number of days for which salespeople are protected. An opportunity team member with Full access level can override the dates for which the protection is active.

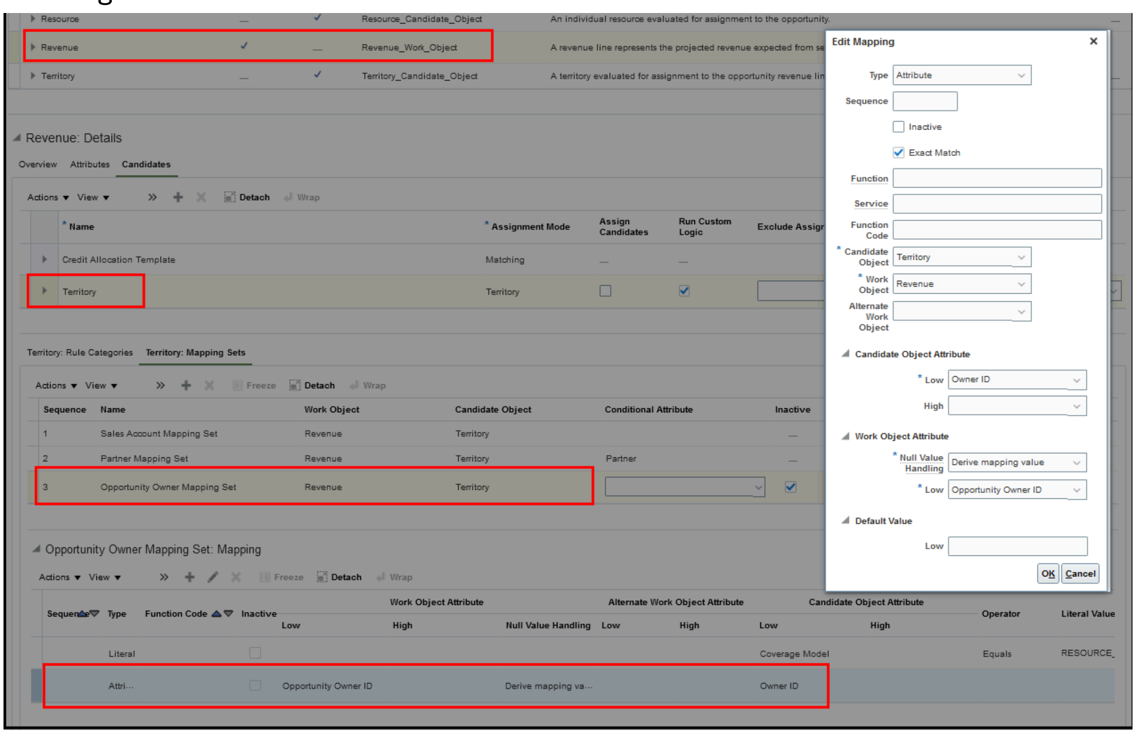
What effect does the predefined Opportunity Owner Mapping Set have for territory assignment?

The **Opportunity Owner Mapping Set** assigns territories to opportunities where the opportunity owner is also the owner of the territory. Assignment mapping sets and their underlying mappings drive territory-based assignment. This mapping enables you to compare and match attribute values between a work object attribute such as Revenue and a candidate object attribute, such as Territory. When the value of the candidate object attribute matches the work object attribute, the candidate is selected.

The mapping set concept is used only with territory-based assignment. Attribute mappings are typically used when the work object and candidate object attributes in the comparison are non-dimensional attributes. Candidate objects are related to work objects, and, for each relationship, the appropriate assignment mode (such as matching and scoring) and processing options are predefined. Literal mappings are a way of filtering the matched territories based on specific values of a territory attribute.

Here how to access the predefined **Opportunity Owner Mapping Set** mapping set for the Revenue work object and Territory candidate object.

1. Select **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. Search for the **Manage Sales Assignment Manager Objects** task.
3. Select the **Revenue** work object. A revenue line represents the projected revenue expected from selling a product.
4. In the **Revenue: Details** area, click the **Candidates** tab.
5. Highlight the **Territory** row and then click the **Territory: Mapping Sets** tab.
6. Highlight the **Opportunity Owner Mapping Set** mapping and from the Actions menu, select Edit to display the following screenshot.



Related Topics

- Assignment Mapping Set Components

What happens if I select the Assign Candidates checkbox during assignment setup?

You can use Assignment Manager processes to assign resources, for example, salespeople or territory owners (candidate objects) to the business objects they work on, such as an opportunity or a lead (work objects). You can change how your selected work and candidate objects are processed from the **Details** UI. For example, select the **Assign Candidates** checkbox to indicate that Assignment Manager performs the assignment of your selected candidate objects.

If you decide to deselect this checkbox, then Assignment Manager will search for any matching candidates and then pass the records to the calling application to update the selected work object.

Rule-Based Assignment (RBA) lets you capture attributes not defined in Territory-Based Assignment (TBA). Once you set up the rules containing conditions that records must meet, then resources get assigned to the object when they match the rule conditions.

Related Topics

- Considerations for Configuring Assignment

What happens when I select the Run Custom Logic checkbox during assignment setup?

An assignment configuration is predefined with setup tasks for each sales application providing assignment processing. You can change the details of your selected work object from the Assignment Manager **Details** UI. For example, select the **Run Custom Logic** checkbox to indicate that Assignment Manager passes the result of the assignment matching to the callback function of the work object.

For example, some work objects such as Opportunity uses custom logic that updates the sales team with the territory members. The Territory-Based Assignment (TBA) process stamps the territories onto the revenue line records and adds the territory team members (resources) to the opportunity sales team.

Use these setup tasks to suit your assignment requirements. You can add or remove assignment attributes, define the relationship between each work object and candidate object, and define mapping sets and mappings that drive territory-based assignment and rule categories that drive rule-based assignment.

Related Topics

- About Sales Resources and Opportunity Assignment

What Assignment Manager attributes can I set for the Territory candidate associated with the Revenue work object?

As you set up work objects and candidate objects in Assignment Manager, you'll also select the attributes of those objects to ensure that candidates are properly assigned to work objects. The attributes you select help decide the mappings and rules which determine how the matching candidate assignment disposition will be carried out.

For example, after you identify the business objects that require assignment and the candidate objects that you'll assign to them, you use attributes to help achieve the best assignments.

Here are some assignment questions to consider when you're deciding what attributes to select and enable.

- Do you want to assign a single resource or multiple resources?
- Do you want to automatically assign matching candidates or run custom logic against matching candidates?
- Do you want to record the matching candidate score on the work object?
- Do you want to retain manually assigned candidates when assignments are processed?
- Do you want to replace disqualified candidates when assignments are processed?

Let's say you want to assign a salesperson (resource) to a business object such as an opportunity, based on the product skill of the salesperson. In this case, when you create the opportunity work object and the salesperson candidate object, you'll select the attributes of opportunity and salesperson that correspond with the product skill. Selecting these attributes makes them available for mappings and for conditions on your rules, so ensure that you select the attributes that reflect the criteria that you want to use for matching business objects to work objects.

Here's a brief summary explanation of the attributes for the territory candidate associated with the revenue work object. A revenue line represents the projected revenue expected from selling a product.

Attribute	Explanation
Assignment Mode	Mode of assignment processing, such as matching or territory.
Assign Candidates	Enable if you want Assignment Manager to perform the assignment of your selected candidate objects. If you decide to deselect this checkbox, then Assignment Manager will search for any matching candidates and then pass the records to the calling application to update the selected work object.
Run Custom Logic	Enable to call a user-defined function during assignment processing. This indicate that Assignment Manager passes the result of the assignment matching to the callback function of the work object. For example, some work objects such as Opportunity uses custom logic that updates the sales team with the territory members. The Territory-Based Assignment (TBA) process stamps the territories onto the revenue line records and adds the territory team members (resources) to the opportunity sales team.
Exclude Assignment Attribute	The value of this column at runtime indicates whether the work object records should be ignored by the Assignment Manager.
Assignment Date Attribute	Used to stamp a date and time of when the work object record was assigned by the Assignment Manager.
Parent Attribute	The candidate object parent attribute.
Differentiation Attribute	Select the attribute used to differentiate matching candidates for each value of that attribute for the candidate object.

Attribute	Explanation
Coverage Attribute	Select the territory attribute used to denote if the candidate in the matching candidate list has a regular, included, or excluded coverage.
Maximum Number of Candidates	The maximum number of candidates is 100.
Merge Assignment Candidates	Enable to indicate whether the matching candidates are to be merged when multiple mapping sets are used during assignment processing.
Team View Object Instance	Select the combined work object and candidate object view instance that captures information for the candidate team.
Assignment Attribute 1 , Assignment Attribute 2, Assignment Attribute 3	The first, second, and third assignment attributes on the work object in the Team table.
Replace Candidates	Enable to replace disqualified candidates on the team when an assignment request is run.
Score Attribute	The information used by the assignment processing when scoring a work object. Stores the score on work object in the Team table where the candidate score will be stamped.
Keep Manual Candidates	Enable to retain manually assigned candidates when an assignment request is run.
System Attribute	Select a system attribute on the work object to store in the Team table if the candidate was assigned by Assignment Manager.
Manual Attribute	Select a manual attribute on the work object to store in the Team table if the candidate was manually assigned.
Exclusion View Object Instance	The view object instance containing the list of excluded candidates.
Primary Key Attribute 1 , Primary Key Attribute 2, Primary Key Attribute 3	The first, second, and third primary key attributes on the work object in the Team table.

Related Topics

- Overview of Assignment Processing Components
- About Sales Resources and Opportunity Assignment