Enterprise Territory Management Implementation Guide

Salesforce, Spring '16

@salesforcedocs

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ENTERPRISE TERRITORY MANAGEMENT

Enterprise Territory Management helps you model your sales territories into a logical but flexible structure that connects sales reps to the accounts they sell to.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Salesforce's original territory management feature lets you grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field relevant to your business. Enterprise Territory Management builds upon the original feature by introducing territory types, territory models, and territory model states. These components let you create and preview multiple territory structures and strategies before you activate and implement the one that works best. Enterprise Territory Management also offers easier assignments between territories, accounts, and opportunities. Custom reports help you organize your territory model for optimum coverage, assess territory effectiveness, and modify your model if necessary. Your team can use Chatter to collaborate as you design and build your territory model.

For comprehensive instructions for implementing this feature, see the *Enterprise Territory Management Implementation Guide*.

ENTERPRISE TERRITORY MANAGEMENT CONCEPTS

Learn about the features and related concepts that make Enterprise Territory Management so powerful and easy to use. Understanding these concepts will help you model your territories more effectively.

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EDITIONS

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IN THIS SECTION:

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create must have a territory type. Territory types are used for organizing and creating territories *only:* they do not appear on territory model hierarchies.

Territory

Territories organize groups of accounts and the Salesforce users who work with those accounts. Territories are created based on territory types.

Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. There are no predefined priority options, so your organization should create its own priority scheme. For example, `001` may indicate that a territory type is the highest priority or the lowest. Make sure your scheme can scale as you add more territory types.

Territory Model

A territory model represents a complete territory management system for your organization. Modeling lets you create and preview multiple territory structures and different account and user assignments before you activate the model that works best.

Territory Hierarchy

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model.

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. Your organization can have only one `active` territory model at a time, but you can create and maintain multiple models in `planning` or `archived` state to use for additional modeling or reference.

How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?

When implementing Enterprise Territory Management, make sure you understand how the feature's permissions affect administration and provide access to records and data.

How Does Filter-Based Opportunity Territory Assignment Work?

Filter-Based Opportunity Territory Assignment lets you use a simple job to assign territories to opportunities. We provide code for an Apex class that you can use as-is or modify as needed based on our guidelines. After you create and deploy the class, run the job to complete the assignment process. Job options include making assignments within date ranges and assigning territories to open opportunities only. You can also configure your settings to run the job every time an opportunity is created.

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create must have a territory type. Territory types are used for organizing and creating territories *only:* they do not appear on territory model hierarchies.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

For example, you might create a territory type called *Universal Telco Named Accounts*, then from that type, create territories that include named accounts. Or you might create a territory type called *US Geographic*, and from that type create territories based on states or regions.

When you create a territory type, make sure the label and description clearly indicate what kinds of territories should belong to that type.

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Territory

Territories organize groups of accounts and the Salesforce users who work with those accounts. Territories are created based on territory types.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The territory record shows you assigned users, manually assigned accounts, and rules that assign accounts automatically. A territory can have both parent and child territories. Depending on how your organization assigns accounts, an account may be assigned to more than one territory.

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Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. There are no predefined priority options, so your organization should create its own priority scheme. For example, *001* may indicate that a territory type is the highest priority or the lowest. Make sure your scheme can scale as you add more territory types.

When you create a new territory, you select a territory type from the `Territory Type` lookup field. From the lookup, you can view the territory type's assigned priority.

Example: Your organization uses territory type priority to reflect your sales strategy for the year. Your organization expects more opportunities within the US east coast than the US west coast in the coming year, so the East Coast territory type is assigned priority *001* and the West Coast territory type is assigned *005*. These priority assignments help those creating territory records make the right territory type choice. At mid-year, you project unexpected growth opportunities in the Great Lakes region, so you create a new territory type called Great Lakes and assign it priority *003* to reflect the change in your sales strategy.

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Territory Model

A territory model represents a complete territory management system for your organization. Modeling lets you create and preview multiple territory structures and different account and user assignments before you activate the model that works best.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Each territory model features a graphical hierarchy. The hierarchy shows your model's territory structure (including parent and child territories) and lets you create, edit, and delete territories and view their detail pages. Your organization can create and modify up to four different territory models at a time, but only one model can be active at any time. Activate the model you want to use to finalize its user and account assignments.

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Territory Hierarchy

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

EDITIONS

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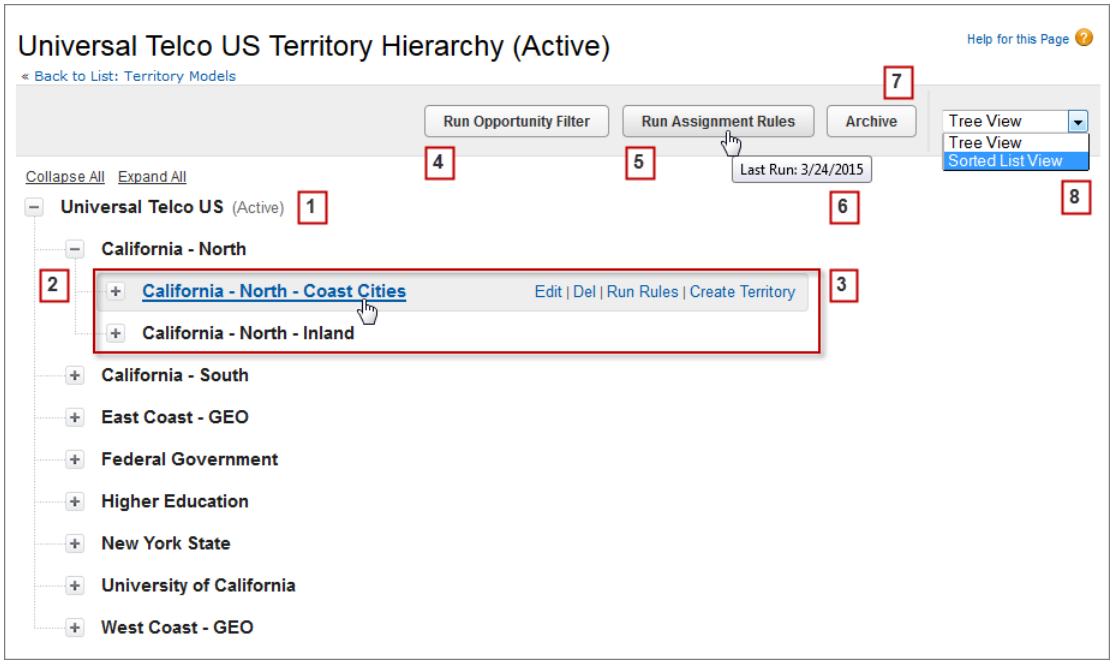

The name and state of the territory model appear at the top node of the hierarchy (1). Parent and child territories are nested beneath the model name (2). Create or edit new child territories or run their assignment rules (3). Run the filter that assigns territories to opportunities (4). Run assignment rules for all territories in the model (5). Hover to learn when rules were last run (6). Set the model's state to `Active` or `Archive` (7). Toggle to a sorted list view and back to tree view (8).

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. Your organization can have only one `active` territory model at a time, but you can create and maintain multiple models in `planning` or `archived` state to use for additional modeling or reference.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Some states reflect a territory model's lifecycle and others indicate errors in processing when states are changed.

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Lifecycle State	Definition
`Planning`	The default state for every new territory model you create. The `Planning` state lets you preview a model's territory hierarchy before deploying it. Users have no territory-related access to accounts in models that are in the `Planning` state.
`Active`	The state of a territory model after you activate it and all processing is complete. Only *one* model in your Salesforce organization can be active at a time. A model in `Active` state lets users view model details, including hierarchies, territories, and all assigned accounts and users. Users assigned to territories within an active model can access and modify accounts they are assigned to within that model.
`Archived`	The state of a territory model after you archive it and all processing is complete. An archived model no longer provides account access to users, but it does let administrators view hierarchy and rule assignments as they were configured when the model was active. Only the *active* model can be archived, and archived models cannot be reactivated. When you archive a territory model or delete a territory on an active model, the `Territory`

Lifecycle State	Definition
	field is reset to a blank value on opportunity records with those territories assigned.

Error State	Definition
`Activation Failed`	An error occurred during activation. Check your email for more information from Salesforce.
`Archiving Failed`	An error occurred during activation. Check your email for more information from Salesforce.

How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?

When implementing Enterprise Territory Management, make sure you understand how the feature's permissions affect administration and provide access to records and data.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Make sure user permissions provide the appropriate level of access for users. For example, you might want Sales Operations managers and selected Sales managers to be able to manage territories. If so, assign them the "Manage Territories" permission. Anyone who will also create account assignment rules also needs the "View All" permission on Accounts.

Users who need to:	Require these permissions, roles, or ownership:
• Create territory models and all related records (such as territory types) • View and manage territory models in all states: `Planning`, `Active`, and `Archived` • Activate, archive, delete, or clone territory models • View territory information on territory-assigned account records for territories in models in *all* states (`Planning`, `Active`, and `Archived`)	Manage Territories
• Create or edit account assignment rules	Manage Territories AND View All on Accounts Note: Which fields are available for account assignment rules depends on account field-level security settings, if any.

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Users who need to:	Require these permissions, roles, or ownership:
	For example, a user has the appropriate permissions for creating account assignment rules, but her profile prevents her from viewing the Account object's `Annual Revenue` field. She will not be able to create account assignment rules that include that field.
• View the Salesforce Setup tree, including territories settings • View the territory model in `Active` state, including its related records (such as territory types and assignment rules) and other elements (such as the territory hierarchy) • View the names of all account records assigned to territories in the `Active` territory model • View territory information on territory-assigned account records for territories in models in the `Active` state only	View Setup and Configuration Note: View Setup and Configuration is enabled by default for the Standard User profile.
View data for models in `Planning` and `Archived` states on reports that include territories, assigned records, or rules	Manage Territories
Manually assign a territory to an opportunity	Sharing access for the opportunity's account. Users who have sharing access to the account can assign any active territory to the opportunity. Those who do not can assign only a territory that is also assigned to the opportunity's account. Note: For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but those with sharing access can search for and assign any territory in the active territory model. When a territory is assigned to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model hierarchy.

How Does Filter-Based Opportunity Territory Assignment Work?

Filter-Based Opportunity Territory Assignment lets you use a simple job to assign territories to opportunities. We provide code for an Apex class that you can use as-is or modify as needed based on our guidelines. After you create and deploy the class, run the job to complete the assignment process. Job options include making assignments within date ranges and assigning territories to open opportunities only. You can also configure your settings to run the job every time an opportunity is created.

The Apex class code Salesforce provides assigns territories to opportunities based on a number of factors.

- Is the opportunity excluded from filter-based territory assignment? If so, no territory is assigned.

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- Does the opportunity have an account assigned and does that account have a territory assigned from the active territory model? If so, the account's territory is assigned to the opportunity. If not, no territory is assigned.
- Does the opportunity's assigned account have multiple territories from the active model assigned? If so, the job can use a priority value from the Territory2type object or other criteria to determine which territory (if any) to assign to the opportunity.

To create your Apex class for filter-based opportunity territory assignment, you can use the sample code we provide in the *Force.com Apex Code Developer's Guide* guide. Our code uses the priority value to assign opportunities when an account has multiple territories from the active model assigned. Or you can create your own Apex class based on our sample code, using the priority value or other criteria you define.

SEE ALSO:

Territory Type Priority

MANAGE YOUR SALESFORCE ORG'S SALES TERRITORIES

Use Enterprise Territory Management to manage and maintain your org's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, activate it, then assign users and accounts. Roll it out to your org, and then run reports to assess its impact and make adjustments if necessary.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Before you begin building your territory model, plan your approach. Choose organizing characteristics such as industry, annual revenue, or location information to divide your organization's accounts into logical segments that work for the way you do business.

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To manage territories:
- "Manage Territories"

IN THIS SECTION:

Enable Enterprise Territory Management

Starting with Winter '15, Enterprise Territory Management is ready to be enabled by administrators in new Salesforce organizations.Organizations created before Winter '15 need to call salesforce.com to enable the feature. Enterprise Territory Management cannot be enabled in existing organizations that have Customizable Forecasting enabled.

Define Enterprise Territory Management Settings

Define and configure settings for Enterprise Territory Management.

Build a Territory Model

A territory model organizes all the elements of your organization's territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the `planning` state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

Manually Assign One or More Territories to an Account

Assign one or more territories to an account directly from the account record. Only territories that belong to models in `Planning` or `Active` state can be assigned to accounts.

Manually Assign One or More Assignment Rules to a Territory

Assign one or more object assignment rules to a territory directly from the territory record. Available rules come from the territory model the territory belongs to.

Manually Assign a Territory to an Opportunity

On an opportunity record, you can assign and track the territory whose assigned sales reps work that opportunity. Manual territory assignments are controlled by your sharing access to the opportunity's assigned (parent) account. When you assign a territory to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model's hierarchy.

Set Up and Deploy Filter-Based Opportunity Territory Assignment

To set up filter-based opportunity territory assignment, first familiarize yourself with how it works. Then enable the feature. Next, you'll define the Apex class that supplies the filter logic—using either our code or your own. If you are using our code, you assign priority values to territory types and run the job that executes the Apex class.

Manually Exclude an Opportunity from Filter-Based Territory Assignment

Opportunities can be excluded from filter-based territory assignment via the API or manually, on the opportunity record.

Clone a Territory Model

Cloning lets you make a copy of a territory model that you can use to test out different territory characteristics. The new model includes the original's territories, assignment rules, users, and manually assigned accounts. Only models in `Planning`, `Active`, or `Archived` state can be cloned. When cloning is complete, the new model is in `Planning` state.

Assign Users to Territories

Assign users to the territories they will operate in to sell products and services. You can assign users to territories that belong to models in `Active` or `Planning` state, though assignments made within `Planning` state models are for planning purposes only: they *do not* affect user access to records.

Identify Users in Territories Assigned to an Account

Accounts and users are assigned to territories independently, but when an account is assigned to a territory, that territory's users have access to the account. It's easy to find out who those users are by looking at the account record.

Identify Territory Users by Territory Role

Keep track of user functions within territories by creating territory roles and assigning them to territory users as needed. Users can even have different roles in different territories.

Use Chatter to Collaborate on Territory Models

Enable Chatter Feed Tracking on the Territory Model object to collaborate on model development directly within model records. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

Activate a Territory Model

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it. Remember that you can also maintain models in `Planning` and `Archived` states for further modeling and reference.

Configure Enterprise Territory Management Permissions and Access for Administrators and Users

An important step in implementing Enterprise Territory Management is making sure the right users can access the right territory model elements, records, and record elements.

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in `Planning` or `Active` state. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

Find Out Which Territories an Assignment Rule Applies To

If you use rules to assign accounts to territories, it can be helpful to find out which territories a single rule applies to.

Enable Enterprise Territory Management

Starting with Winter '15, Enterprise Territory Management is ready to be enabled by administrators in new Salesforce organizations.Organizations created before Winter '15 need to call salesforce.com to enable the feature. Enterprise Territory Management cannot be enabled in existing organizations that have Customizable Forecasting enabled.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

1. From Setup, enter *Territories* in the Quick Find box, then select **Settings**.
2. Click **Enable Enterprise Territory Management**.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Enterprise Territory Management:

- "Customize Application"

Define Enterprise Territory Management Settings

Define and configure settings for Enterprise Territory Management.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

IN THIS SECTION:

Define Default User Access for Territory Records

Specify the *default* settings for how users can access and modify records associated with the sales territories you set up. The access provided by default settings can be modified when you create or edit an individual territory.

Enable Filter-Based Opportunity Territory Assignment

Enable and configure filter-based assignment of territories to opportunities..

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up Enterprise Territory Management:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Define Default User Access for Territory Records

Specify the *default* settings for how users can access and modify records associated with the sales territories you set up. The access provided by default settings can be modified when you create or edit an individual territory.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The standard record access settings apply to accounts and opportunities. If your organization uses `Private` default internal access for contacts or cases, you can also set access for those records.

1. From Setup, enter `Territories` in the `Quick Find` box, then select **Settings**.
2. Select the default access levels you want for accounts and opportunities.
3. If applicable, select the default access levels for contacts and cases.
4. Click **Save**.

EDITIONS

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USER PERMISSIONS

To create a territory model:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Enable Filter-Based Opportunity Territory Assignment

Enable and configure filter-based assignment of territories to opportunities..

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter `Territories` in the `Quick Find` box, then select **Settings**.
2. Enable Filter-Based Opportunity Territory Assignment.
3. If your organization is using the Apex code Salesforce provides, first create the class and then return to this Settings page and enter the class name: `OppTerrAssignDefaultLogicFilter`. If you opt to use your own code for the Apex class, you'll come back and enter the name of the class that you create.
4. If you want to run the filter-based opportunity territory assignment job when opportunities are created, select that option.
5. Save your settings.

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USER PERMISSIONS

To enable Enterprise Territory Management:

- "Customize Application"

Build a Territory Model

A territory model organizes all the elements of your organization's territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the `planning` state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

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USER PERMISSIONS

To build a territory model:

- "View Setup and Configuration"

  AND

  "Manage Territories"

IN THIS SECTION:

1. Create Territory Types

   Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

2. Create a Territory Model Record

   The first step in building your territory model is creating the record that connects the other elements, including territories, user assignments, and account assignments. When you create a territory model record, Salesforce generates a territory hierarchy for it.

3. Create Territories

   Create territories as you build your organization's territory model. When you create a territory, it appears on the model's territory hierarchy.

4. Create and Preview Territory Account Assignments

   You assign accounts to territories by either creating rules that assign them automatically or adding them manually. Rules can be configured to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they are made.

Create Territory Types

Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Examples of territory types you might create include *Named Accounts*, *Direct Accounts*, and *Overlay Sales*.

1. From Setup, enter *Territory Types* in the Quick Find box, then select **Territory Types**.
2. Click **New Territory Type**.
3. Enter a label and a description. In your description, make sure you clearly indicate what kinds of territories should belong to that type.
4. Specify a territory type priority.
5. Click **Save**.

SEE ALSO:

Territory Type Priority

EDITIONS

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USER PERMISSIONS

To create a territory type:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Create a Territory Model Record

The first step in building your territory model is creating the record that connects the other elements, including territories, user assignments, and account assignments. When you create a territory model record, Salesforce generates a territory hierarchy for it.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Your organization's Salesforce edition determines the number of territory models you can create in production and sandbox orgs. This limit includes models created by cloning.

Edition	Number of Models in Production Orgs	Number of Models in Sandbox Orgs
Developer	4	4
Enterprise	2	2
Performance	4	4
Unlimited	4	4

1. From Setup, enter *Territory Models* in the Quick Find box, then select **Territory Models**.
2. Click **New Territory Model**.
3. Define the label and description fields.

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USER PERMISSIONS

To create a territory model record:

- "View Setup and Configuration"

  AND

  "Manage Territories"

4. Click **Save**.

Create Territories

Create territories as you build your organization's territory model. When you create a territory, it appears on the model's territory hierarchy.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

By default, each territory model can have up to 1,000 territories.

1. Open the territory model where you want to create the territory.
2. If you need to, select **Tree View** from the drop-down to show the model's territory hierarchy, including any existing territories.
3. To create a top-level territory, hover over the territory model name and click **Create Territory**. To create a child territory from an existing territory, hover over the territory name and click **Create Territory**.
4. On the New Territory page, define the territory: give it a meaningful label, choose its territory type. If the territory requires *different* user access for accounts and opportunities than the *default* user access for those records, define the territory's user access levels.
5. Click **Save**.

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USER PERMISSIONS

To create territories:
- "View Setup and Configuration"

  AND

  "Manage Territories"

SEE ALSO:

Territory Type Priority

Create and Preview Territory Account Assignments

You assign accounts to territories by either creating rules that assign them automatically or adding them manually. Rules can be configured to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they are made.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Before you commit to your model's account assignments, you should preview them by running assignment rules and related reports while the model is in `Planning` state. When you're satisfied with your planned account assignments, change the model to `Active` state. Then, run assignment rules again so that your territories include affected accounts that were created or updated during the activation process.

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IN THIS SECTION:

Use Rules to Assign Accounts to Territories

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

Manually Assign Accounts to a Territory

Accounts that are not assigned to territories by rules can be assigned manually to more or more territories, one territory at a time. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

Preview Territory Account Assignments

Before you activate a territory model, you should preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in `Planning` state. Also verify your manual assignments.

Use Rules to Assign Accounts to Territories

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Tip: It's a best practice *not* to assign a rule to a territory if that rule is a child of another rule *already assigned* to the territory. To find out what rules apply to a territory, just open the territory's record detail page and look at the Assignment Rules Assigned to this Territory related list. If a rule has `Apply to Child Territories` selected, do not assign the rule separately to child territories.

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USER PERMISSIONS

To create rules within your territories:

- "Customize Application"
  "Manage Territories"

1. From the territory model hierarchy, open the territory where you want to create a rule.
2. On the detail page, in the Assignment Rules Defined in this Territory related list, click **New**.
3. Note: If your org has enabled state and country picklists, territory assignment rules using states as a criteria must use `contains` matching instead of `equals` matching.

   On the rule edit page, enter a name for the new rule and define selection criteria.
4. If you want the rule to also apply to the current territory's descendents, select the **Apply to child territories** checkbox.
5. If you want the rule to run automatically whenever a user creates or edits an account, select the **Active** checkbox.
6. Click **Save** to save the rule and return to the territory detail page.
7. (Optional) In the Assignment Rules Defined in This Territory related list, click **Run Rules**.
   You'll receive an email when the process is complete.

Example: Rules can work together within territories and child territories. For example, you create a territory called Western States, with child territories Washington, Oregon, and California. From the Western States territory record, you create a rule that assigns accounts in Washington, Oregon, and California to that territory. You apply that rule to child territories and then, from the California territory record, you create a rule that assigns accounts in California to the California territory.

For any child territories for the California territory, you don't need to specify the state in the criteria if you mark the California territory rule as inheritable to child territories. Instead, you can use more specific criteria, such as ZIP code or industry.

Manually Assign Accounts to a Territory

Accounts that are not assigned to territories by rules can be assigned manually to more or more territories, one territory at a time. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the territory model hierarchy, open the territory where you want to assign one or more accounts.
2. On the territory's detail page, in the Manually Assigned Accounts related list, click **Add Accounts** to see a list of your organization's accounts. Adjust the list view if you need to.
3. In the `Available` related list, select the checkbox for each account you want to assign. If you need to view more records, click **More** beneath the list.
   Each selected account appears in the Selected related list.
4. Click **Assign**.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign accounts manually within your territories:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Preview Territory Account Assignments

Before you activate a territory model, you should preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in `Planning` state. Also verify your manual assignments.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Important: To protect data quality, you cannot modify a territory until you receive the email confirming that the rules have been run successfully. If rules do not run successfully, follow instructions provided in the email for troubleshooting specific issues.

1. Open the record for the territory model whose assigned accounts you want to preview and click **View Hierarchy**.
2. Verify that the model is in `Planning` state.
3. Click **Run All Rules**.
   When rules are finished running, we'll send an email to let you know. Processing may take some time, depending on the size and complexity of your organization.
4. From the territory model hierarchy, open each territory and descendent affected assignment rules. Also open territories that have manual account assignments.
5. On the territory detail page, click **View Accounts** to see assigned accounts. The `Method` column indicates how each account was assigned: by a rule or manually.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To preview territory model account assignments:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Note: If you make changes to the rules for a territory, you must run rules again to view those changes. In this case, you may want to run rules on that territory only. To do so, navigate to the territory's detail page, scroll to the Assignment Rules Defined in this Territory related list, and click **Run Rules**.

Manually Assign One or More Territories to an Account

Assign one or more territories to an account directly from the account record. Only territories that belong to models in `Planning` or `Active` state can be assigned to accounts.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account you want to assign territories to.
2. On the account's detail page, in the Assigned Territories related list, click **Assign Territories** to see a list of your organization's territories. Adjust the list view if you need to.
3. Select the territory model that contains the territories you want to associate.
4. In the `Available` related list, select the checkbox for each territory you want to assign. If you need to view more records, click **More** beneath the list.
   Each selected territory appears in the Selected related list.
5. Click **Assign**.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign territories manually within your accounts:

- "View Setup and Configuration"

  AND

  "Manage Territories"

To view territories from `Active`, `Planning`, or `Archived` territory models that are assigned to an account:

- "View Setup and Configuration"

  AND

  "Manage Territories"

To view territories assigned from the `Active` territory model that are assigned to an account:

- "View Setup and Configuration"

Manually Assign One or More Assignment Rules to a Territory

Assign one or more object assignment rules to a territory directly from the territory record. Available rules come from the territory model the territory belongs to.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Territories can have up to 15 assignment rules each.

1. Open the territory you want to assign rules to.
2. On the territory's detail page, in the **Assignment Rules Assigned to This Territory** related list, click **Assign Rules** to see a list of rules available in the model.
3. In the `Available` related list, hover over the names of available rules to view the details of their criteria. Select the checkbox for each rule you want to assign to the territory. If you need to view more rules, click **More** beneath the list.
   Each selected rule appears in the Selected related list.
4. Apply selected rules to child territories as appropriate.
5. Click **Assign**.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign rules to a territory:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Manually Assign a Territory to an Opportunity

On an opportunity record, you can assign and track the territory whose assigned sales reps work that opportunity. Manual territory assignments are controlled by your sharing access to the opportunity's assigned (parent) account. When you assign a territory to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model's hierarchy.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Users who *have* sharing access to the opportunity's account can assign *any* territory from the active model to the opportunity. Those who *do not* can assign *only* a territory that is *also* assigned to the opportunity's account. For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but those with sharing access can search for and assign any territory in the active territory model.

1. Open the opportunity record.
2. In the `Territory` field, specify the territory you want to assign.
3. Save the opportunity record.

Example: The Utel.com account has six opportunities and two territories (East Coast and West Coast). They can assign East Coast, West Coast, or any other territory within the active model to any or all of those six opportunities. One of their sales reps has sharing access to the account assigned to one of the opportunities, so she can assign any territory to that opportunity. For the other five opportunities, she does not have sharing access to assigned accounts, for each of those, she can only assign a territory that is already assigned to the opportunity's assigned account.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To manually assign territories to opportunities:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Set Up and Deploy Filter-Based Opportunity Territory Assignment

To set up filter-based opportunity territory assignment, first familiarize yourself with how it works. Then enable the feature. Next, you'll define the Apex class that supplies the filter logic—using either our code or your own. If you are using our code, you assign priority values to territory types and run the job that executes the Apex class.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- "View Setup and Configuration"

  AND

  "Manage Territories"

IN THIS SECTION:

1. Define the Apex Class for Filter-Based Opportunity Territory Assignment
   Before enabling filter-based opportunity territory assignment, create an Apex class to define logic for a job that assigns territories to opportunities.
2. Enable Filter-Based Opportunity Territory Assignment
   After you define the Apex class, enable and configure filter-based assignment of territories to opportunities.
3. Determine Your Salesforce Org's Territory Priority Values
   The sample Apex code Salesforce provides uses territory type priority values to assign territories to opportunities. If you're using our Apex code or creating a class of your own that uses priority values, your org should determine a scalable priority value scheme that works for you. It's important to let those assigning priorities know the scheme you have determined.
4. Manually Assign Territory Type Priority
   You can manually assign territory type priority for individual territory type records.
5. Run the Opportunity Territory Assignment Filter
   The opportunity territory assignment filter automatically assigns territories to opportunities based on the filter logic in the Apex class.

SEE ALSO:

How Does Filter-Based Opportunity Territory Assignment Work?

Define the Apex Class for Filter-Based Opportunity Territory Assignment

Before enabling filter-based opportunity territory assignment, create an Apex class to define logic for a job that assigns territories to opportunities.

1. From Setup, enter *Apex Classes* in the Quick Find box, then select **Apex Classes** and click **New**.
2. In the field on the Apex Class tab, either paste our sample code or enter your own Apex filter code. If you use your own code for the Apex class, it must implement the `OpportunityTerritory2AssignmentFilter` interface. You can find our code in the *Apex Developer Guide*.
3. Save the class.
4. If you're using your own Apex code, note the class name so you can enter it when you enable filter-based opportunity territory assignment.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Enable Filter-Based Opportunity Territory Assignment

After you define the Apex class, enable and configure filter-based assignment of territories to opportunities.

1. From Setup, enter *Territories* in the Quick Find box, then select **Settings**.
2. Select the checkbox to enable filter-based opportunity territory assignment.
3. If your organization is using the Apex code Salesforce provides, enter the class name *OppTerrAssignDefaultLogicFilter*. If your organization is using its own code for the Apex class, enter the name of the class you created.
4. Note: If your org has enabled state and country picklists, territory assignment rules using states as a criteria must use `contains` matching instead of `equals` matching.

   If you want to run the filter-based opportunity territory assignment job when opportunities are created, select that option.
5. Save your settings.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Determine Your Salesforce Org's Territory Priority Values

The sample Apex code Salesforce provides uses territory type priority values to assign territories to opportunities. If you're using our Apex code or creating a class of your own that uses priority values, your org should determine a scalable priority value scheme that works for you. It's important to let those assigning priorities know the scheme you have determined.

The Territory2Type object's **Priority** field accepts numeric values only. If you are using the sample Apex code Salesforce provides (for the `OppTerrAssignDefaultLogicFilter` class), the higher the number, the higher the priority.

You can assign territory type priority via the API by updating the Territory2Type object's `Priority` field. Or you can manually assign priority for individual territory types from the territory type record.

Example: Your org's highest territory type priority might be **500**, next might be **400**, then **300**, and so on, allowing for intervening values (like **350** or **375**) if they're needed later.

SEE ALSO:

Territory Type Priority

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Manually Assign Territory Type Priority

You can manually assign territory type priority for individual territory type records.

1. Open the territory type record.
2. Enter the priority value in the `Priority` field.
3. Save the record.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Run the Opportunity Territory Assignment Filter

The opportunity territory assignment filter automatically assigns territories to opportunities based on the filter logic in the Apex class.

1. View the active territory model's hierarchy.
2. Click **Run Opportunity Filter** to initiate the job that applies the filter. Select options for which opportunities to include . Show more options to enter a date range.
3. Click **Run Opportunity Filter**.
   You'll receive an email when the job is complete.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Manually Exclude an Opportunity from Filter-Based Territory Assignment

Opportunities can be excluded from filter-based territory assignment via the API or manually, on the opportunity record.

1. Open the opportunity record you want to exclude.
2. Select the `Exclude from the territory assignment filter logic` checkbox.
3. Save the record.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Clone a Territory Model

Cloning lets you make a copy of a territory model that you can use to test out different territory characteristics. The new model includes the original's territories, assignment rules, users, and manually assigned accounts. Only models in `Planning`, `Active`, or `Archived` state can be cloned. When cloning is complete, the new model is in `Planning` state.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

After the cloning process is complete, the new territory model it creates is in `Planning` state.

1. Open the territory model you want to clone.
2. Click **Clone**.
3. Define the label and description fields.
4. Click **Save**.
   The model state changes to `Cloning` while Salesforce processes your request. Cloning may take some time, depending on the size and complexity of your model. When the process is complete, we'll send you an email to let you know

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To clone a territory model:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Assign Users to Territories

Assign users to the territories they will operate in to sell products and services. You can assign users to territories that belong to models in `Active` or `Planning` state, though assignments made within `Planning` state models are for planning purposes only: they *do not* affect user access to records.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the territory model hierarchy, open the territory where you want to assign users.
2. On the territory's detail page, in the Assigned Users related list, click **Manage Users**.
3. On the Assign Users page, select or search for the user you want to add.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign users to territories:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Identify Users in Territories Assigned to an Account

Accounts and users are assigned to territories independently, but when an account is assigned to a territory, that territory's users have access to the account. It's easy to find out who those users are by looking at the account record.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account record that has territories assigned.
2. Identify the users from the Users in Assigned Territories related list.

   Note: The `Modified Date` field in this related list tells the last time the user territory association record was modified. It may or may not indicate when the user was assigned to the territory.

Example: Six sales reps are assigned to the East Coast territory. Because XYZ Publishing is also assigned to the East Coast territory, the six sales reps in the territory appear in the Users in Assigned Territories related list on the XYZ Publishing account record.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view users in territories from `Active`, `Planning`, or `Archived` territory models that are assigned to an account:

- "View Setup and Configuration"

  AND

  "Manage Territories"

To view users in territories in the `Active` territory model that are assigned to an account:

- "View Setup and Configuration"

Identify Territory Users by Territory Role

Keep track of user functions within territories by creating territory roles and assigning them to territory users as needed. Users can even have different roles in different territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Example: For example, you might create roles like Territory Owner, Sales Manager, Product Specialist, or Sales Representative.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

IN THIS SECTION:

1. Define a Picklist for Territory User Roles

   Add territory roles to the UserTerritoryAssociation object's `Role in Territory` picklist so you can select roles for territory users. The Role in Territory picklist you define can be used for all territories in `Active` or `Planning` state.

2. Assign Territory Roles to Users
   Assign territory roles to identify the roles of users within territories.

Define a Picklist for Territory User Roles

Add territory roles to the UserTerritoryAssociation object's `Role in Territory` picklist so you can select roles for territory users. The Role in Territory picklist you define can be used for all territories in `Active` or `Planning` state.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the object management settings for user territory associations, go to the fields area.
2. Click **Role in Territory**, and then click **New**.
3. Enter the picklist values you want and click **Save**.
   The values you entered are now available for selection from the `Role in Territory` picklist on the territory's Users Assigned edit page.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To define picklists:
- "Customize Application"

Assign Territory Roles to Users

Assign territory roles to identify the roles of users within territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you have created a Role in Territory picklist so you have some roles to select for users.
2. Open the record of the territory where you want to assign territory roles.
3. In the Assigned Users list, click **Edit** next to the name of a user to whom you're assigning a territory role.
4. From the `Role in Territory` picklist, select the user's territory role.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign territory roles to users:
- View Setup and Configuration

  AND

  "Manage Territories"

Use Chatter to Collaborate on Territory Models

Enable Chatter Feed Tracking on the Territory Model object to collaborate on model development directly within model records. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

After you enable and configure Chatter Feed Tracking, anyone with access to a territory model record can use Chatter to collaborate on that model. Those who follow the record will get updates in their own Chatter feeds when tracked fields are updated.

1. Make sure Chatter has been enabled for your organization.
2. From Setup, enter *Feed Tracking* in the `Quick Find` box, then select **Feed Tracking**.
3. Select the Territory Model object. Enable Feed Tracking, then select the territory model fields you want to track.
4. Click **Save**.
   The Chatter feed appears at the top of your organization's territory model records.
5. Make sure to tell others who maintain territory models that they can now use Chatter to follow and collaborate on territory models directly from model records.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Chatter Field Tracking:
- "Customize Application"

To share a Chatter post on a territory model record:
- "View Setup and Configuration"

  AND

  "Manage Territories"

Activate a Territory Model

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it. Remember that you can also maintain models in `Planning` and `Archived` states for further modeling and reference.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Important: Only one model can be in the `Active` state at one time in your organization, and you can only activate a model that is in the `Planning` state. After activating a model, you cannot reset it to `Planning` state: you can only set it to `Archived` state.

1. If you need to, preview account assignments before activating the model.
2. Open the record for the territory model you want to activate and click **View Hierarchy**.
3. Click **Activate**.
   The model state changes to `Activating` while Salesforce processes your request. Activation may take some time, depending on the size and complexity of your model. When the process is complete, we'll send you an email to let you know.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To activate a territory model:
- "View Setup and Configuration"

  AND

  "Manage Territories"

Configure Enterprise Territory Management Permissions and Access for Administrators and Users

An important step in implementing Enterprise Territory Management is making sure the right users can access the right territory model elements, records, and record elements.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you understand how permissions affect territory model and record access in Enterprise Territory Management.
2. Assign user permissions as needed.
3. Add the Assigned Territories related list to your account page layouts. This list lets administrators manually assign territories to accounts and it lets users can identify which territories are assigned to their accounts. Make sure the related list includes the standard and custom fields (if any) that administrators and users need to view.
4. Add the Users in Assigned Territories related list to your account page layouts. This list lets administrators and users see all users assigned to the territories that are assigned to an account, according to their permissions. Make sure the related list includes the standard and custom fields (if any) that administrators and users need to view.
5. Add the `Territory` field to your Opportunity page layouts. This field lets administrators and sales managers manually assign a territory to an opportunity from a list of the territories assigned to the opportunity's account. Add the `Territory Name` and `Territory Description` fields to Opportunity list views and reports so that users can identify assigned territories there.
6. Add any custom buttons, links, or actions you've created to territory page layouts.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign user permissions:
- "Manage Users"

To create, edit, and delete page layouts:
- "Customize Application"

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in `Planning` or `Active` state. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the hierarchy for the territory model the territory model belongs to.
2. In the tree view or list view, find the territory you want to run rules for.
3. In list view, click **Run Rules**. In tree view, hover over the territory name and then click **Run Rules**. If you want to view the territory record's details, including its assigned rules, *before* you run its rules, open the record and then click the **Run Rules** button in the Assignment Rules Assigned to This Territory related list.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To run rules within your territories:
- "Customize Application"

  AND

  "Manage Territories"

Find Out Which Territories an Assignment Rule Applies To

If you use rules to assign accounts to territories, it can be helpful to find out which territories a single rule applies to.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter *Territory Models* in the Quick Find box, then select **Territory Models** to view a list of your organization's territory models.
2. Find the model in which the rule operates and click **View Rules** to see a list of all the rules associated to the model and its territories.
3. Click the rule name and look for the territories it applies to in the Assigned Territories related list.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view assignment rule details:

- "Customize Application"

  AND

  "Manage Territories"

CREATE CUSTOM REPORT TYPES FOR ENTERPRISE TERRITORY MANAGEMENT REPORTS

Organizations using Enterprise Territory Management can run reports that show account assignments, user assignments, and more. Set up custom report types so sales managers and other users can create the reports they need.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.
2. Create custom report types relating these objects and configuring them as necessary. Make all fields available for reporting. Add each report to the Territory Management report type category. Provide a clear name and description for each report type so users who create reports can understand which one to use for their needs.

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Accounts assigned to territories	Accounts	Territories Select **"A" records must have related "B" records**.	–
Accounts not assigned to territories	Accounts	Territories Select **"A" records may or may not have related "B" records**.	–
Territories with assigned accounts	Territory Models	Territories	Territory-Assigned Records Select **"B" records must have related "C" records**.
Territories without assigned accounts	Territory Models	Territories	Territory-Assigned Records Select **"B" records may or may not have related "C" records**.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create or update custom report types:
- "Manage Custom Report Types"

To delete custom report types:
- "Modify All Data"

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Users assigned to territories	Users	Territories Select **"A" records must have related "B" records**.	–
Users not assigned to territories	Users	Territories Select **"A" records may or may not have related "B" records**.	–
Territories with assigned users	Territory Models	Territories	Users Select **"B" records must have related "C" records**.
Territories without assigned users	Territory Models	Territories	Users Select **"B" records may or may not have related "C" records**.
Summarizable account information by territory	Accounts	Territories Select **Each "A" record must have at least one related "B" record**.	–

3. Deploy the report types you want to make available to users.
4. Let users know that they can create reports using these custom report types.

REPORT ON ACCOUNTS ASSIGNED TO TERRITORIES

Manage account assignments to sales territories by reporting on which accounts have been assigned to territories. See which accounts belong to which territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Accounts and Territories objects. It should specify that the Accounts object *must* have related Territory records and it should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Accounts field *Account Name* and the Territories field *Label* appear on the report. If they do not, add them.
6. (Optional) Filter the report results. To show data from territory models in Active state *only*, from the Filters drop-down list, select *Field Filter*. Configure the filter options to show *Territory Model: Label equals <name of active territory model>* and then click **OK**. From the **Show** field, to filter by account ownership, select *My accounts*, *My team's accounts*, or *My territory teams' accounts*. To filter by user territory assignment, select *My territories' accounts*.

   Important: If you later activate a different territory model, make sure you update the territory model name variable in this report.
7. Add any other fields you find useful for this report.
8. Save the report and run it.
9. (Optional) Summarize information by Accounts field *Account Name* to show each account along with the number of territories it's assigned to.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

REPORT ON TERRITORIES WITHOUT ASSIGNED ACCOUNTS

Manage account assignments to sales territories by reporting on which territory models' territories do not have assigned accounts.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Territory Models, Territories, and Territory-Assigned Records objects. It should specify that the Territories object *may or may not* have related Territory-Assigned records and should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Territory Models field `Label` and the Territories field `Label` appear on the report. If they do not, add them.
6. From the `Filters` drop-down list, select `Cross Filter`. Configure the filter options to show `Territories without Territory-Assigned Records` and then click **OK**. Configure the filter options to show `Object equals Account`.
7. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `State equals Active` and then click **OK**.
8. Add any other fields you find useful for this report.
9. Save the report and run it.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

REPORT ON USERS NOT ASSIGNED TO TERRITORIES

Manage user assignments to sales territories by reporting on which users have not been assigned to territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Users and Territories objects. It should specify that the Users object *may or may not* have related Territories records and should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Users field *`Full Name`* and the Territories field *`Label`* appear on the report. If they do not, add them.
6. From the `Filters` drop-down list, select *`Cross Filter`*. Configure the filter options to show *`Users without Territories`* and then click **OK**.
7. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select *`Field Filter`*. Configure the filter options to show *`Territory Model: Label equals <name of active territory model>`* and then click **OK**.

   Important: If you later activate a different territory model, make sure you update the territory model name variable in this report.
8. Add any other fields you find useful for this report.
9. Save the report and run it.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

REPORT ON TERRITORIES WITH ASSIGNED USERS

Manage user assignments to sales territories finding out which territory models' territories have users assigned. See which assigned users belong to which territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Territory Models, Territories, and Users objects. It should specify that the Territory object *must* have related Users records and make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Territory Models field `Label`, the Territories field `Label` , and the Users field `Full Name` appear on the report. If they do not, add them.
6. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `State equals Active` and then click **OK**.
7. Add any other fields you find useful for this report.
8. Save the report and run it.
9. (Optional) Summarize information by Territory object field `Label` to show each territory with the users assigned to it.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

REPORT ON SUMMARIZABLE ACCOUNT FIELDS BY TERRITORY

Gauge territory size by reporting on summarizable account data, such as annual revenue or number of employees.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Accounts and Territories objects. It should specify that the Accounts object *must have* at least one Territory object record and should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Select *Matrix Format* for the report.
6. From the Territories field list, select the *Label* field. Drag it to create a row grouping.
7. From the Accounts field list, select the *Account Name* field. Drag it to create a row grouping.
8. From the Accounts field list, select summarizable fields, such as *Annual Revenue* and *Employees*, to show those totals. Drag them into the summarizable fields area. When prompted, select the *Sum* checkbox.
9. (Optional) Filter the report results. From the **Show** field, to filter by account ownership, select *My accounts*, *My team's accounts*, or *My territory teams' accounts*. To filter by user territory assignment, select *My territories' accounts*.
10. Add any other fields you find useful for this report.
11. Run the report and make sure it shows the data and the arrangement you want.
12. Summarize information by the Territories field *Label* to total all the summarizable field values by territory.
13. Save the report.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

ARCHIVE A TERRITORY MODEL

Archiving a territory model deactivates it in your organization, but the model remains in your territory model list, where you can reference its associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can only archive a model that is in the `Active` state. After archiving a model, you cannot return it to the `Active` state or the `Planning` state.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter *`Territory Models`* in the `Quick Find` box, then select **Territory Models**.
2. Click **Edit** next to the territory model you want to archive.
3. Choose **Archiving** from the `State` drop-down.
   The model state changes to `Archiving` while Salesforce processes your request. When processing is complete, the model state changes to `Archived`, and you receive a confirmation via email. This may take some time, depending on the size and complexity of your organization.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To archive a territory model:
- "Manage Territories"

DELETE A TERRITORY MODEL

Delete a territory model if your organization no longer actively uses the model for territory management or reference. You can't delete an active territory: the model must be in `Planning` or `Archived` state.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Deleting a territory model also deletes all its associated territories and account assignments. You can't cancel the process or restore a deleted model. The process may take several hours, so we'll send you an email when it's complete.

1. From Setup, enter *`Territory Models`* in the `Quick Find` box, then select **Territory Models**.
2. Find the model in the list. Check the value in the **State** column to make sure the model is in the `Planning` or `Archived` state.
3. Click **Del**.
4. Later, check your email for confirmation that the deletion process is complete.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To delete a territory model:

- "Manage Territories"

DISABLE ENTERPRISE TERRITORY MANAGEMENT

If you wish, you can disable Enterprise Territory Management for your organization and use another means of record sharing.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Important: If you disable Enterprise Territory Management, your users lose record access that's based on territory assignments, and your organization no longer has access to territory management data. If you re-enable Enterprise Territory Management, you may lose data that had previously been available through the feature.

1. If you haven't already, archive your active territory model before disablingEnterprise Territory Management.
2. From Setup, enter *Territories* in the Quick Find box, then select **Settings**.
3. Click **Disable Territory Management 2.0**.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To disable Enterprise Territory Management:

- "Customize Application"