Summary

A territory is a collection of accounts with shared characteristics, such as a geographical area.

Any Account Owner

You can view all accounts in your territories, no matter who the account owner is.

Territories, Accounts, and Opportunities

You can assign a territory to an account or to an opportunity.

Viewing Territory Information

✏️ **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management. Original Territory Management is available only with Customizable Forecasts and is not supported with Collaborative Forecasts. If original Territory Management is enabled, you can no longer use Collaborative Forecasts. The newer Enterprise Territory Management can't be used with Customizable Forecasts. 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.

As a salesperson, you can view territory-based information on the Forecast tab or in reports. You can see it by account, opportunity or user.

Account and opportunity list views

Account and opportunity list views can be restricted by My Territories or My Territory Teams. My Territories refers to records associated with territories to which you belong. My Territory Teams refers to records associated with either territories to which you belong or territories below you in the territory hierarchy.

Account and opportunity detail pages

Account detail pages display territory names in the `Territories` field. Opportunity detail pages display a territory name in the `Territory` field.

User detail pages

User detail pages display territory names in the Territories related list.

Forecasts

When territory management is enabled, forecast information is derived from the opportunities that are associated with the accounts in those territories. You have a different forecast for each territory to which you are assigned.

To view your forecasts, click the Forecast tab. Your name defaults to `View forecast of:`. If you have the appropriate permissions, you can search for other users' forecasts. Use the `Territory` drop-down to change the forecast information based on the territory.

You can also view the forecast for an opportunity in the Opportunity Forecasts related list on the opportunity detail page. However, opportunities that are not assigned to territories do not show up in this forecast.

Reports

Several standard territory reports are available in the Territory Reports folder. Use them to view lists of territories in your organization, users in each territory, territories to which accounts and opportunities are assigned, and more.

Assigning Territories to an Account

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When users move into new territories, they can take their existing accounts and opportunities with them. Users and accounts can be associated with multiple territories. A manually added account remains in a territory until it is manually removed.

📝 **Note:** You must have the "Manage Territories" permission to assign territories to accounts.

To manually assign territories to an account:

1. From the account detail page, click **Change** next to the `Territories` field.

2. At the Rule-based territory assignments list, view the territories that contain the account due to active account assignment rules. You cannot use this page to remove the account from these territories; to do so, you must modify the account assignment rules that evaluated the account.

3. If the account has existing manual assignments to one or more territories, the names of those territories appear in the Selected territories list.

4. Click **Select** and **Deselect** to move territories between the Available territories list and the Selected territories list.

5. Optionally, click the Horizontal View or Vertical View options in the drop-down list to place the Selected territories list either alongside or below the Available territories list.

6. When the Selected territories list contains the territories to which the account should be manually assigned, click **Save** to finish and return to the account detail page.

Auto-Assign Accounts

Accounts can be automatically assigned to territories by rules that move accounts based on their field values.

Assigning a Territory to an Opportunity

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You can associate an opportunity with a territory. An opportunity can only be associated with one territory.

📝 **Note:** You must have the "Edit" permission on opportunities to change the territory for an opportunity.

Auto-Assign Opportunities

Opportunities can be automatically assigned to territories based on account assignment rules.

To manually assign a territory for an opportunity:

1. On the opportunity detail page, click **Change** next to the `Territory` field.

2. Choose a territory from the `Opportunity Territory` drop-down list.

3. The drop-down list shows:

   - Territories where both the opportunity owner and the account on the opportunity are assigned to the territory.

   - Territories to which you have administrative access that are also associated with the account on the opportunity.

   - Territories to which you have administrative access that are above the account on the opportunity in the territory hierarchy.

4. Click **Save** to finish and return to the opportunity detail page.