Deploying Territory Management

Salesforce, Summer '16

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INTRODUCTION TO TERRITORY MANAGEMENT

Territory Management

Territory management is an account sharing system that grants access to accounts based on the characteristics of the accounts. It enables your company to structure your Salesforce data and users the same way you structure your sales territories.

> **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.

Particularly if your organization has a private sharing model, you may need to grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field that is relevant to your business. You may also need to generate forecasts for these diverse categories of accounts. Territory management solves these business needs and provides a powerful solution for structuring your users, accounts, and their associated contacts, opportunities, and cases.

> **Note:** Account ownership and its effect on record sharing remains valid and unchanged when territory management is in use.

Key benefits of territory management include:

- The ability to use account criteria to expand a private sharing model.
- Support for complex and frequently changed sales organization structures.
- Support for transferring users between territories, with the option to retain opportunities.
- Multiple forecasts per user, based on territory membership.
- Territory-based sales reports.

> **Note:** Territory management only affects accounts and the standard objects that have a master-detail relationship to accounts. For example, opportunities are included in territory management but leads are not.

What Is a Territory?

A territory is a flexible collection of accounts and users where the users have at least read access to the accounts, regardless of who owns the account. By configuring territory settings, users in a territory can be granted read, read/write, or owner-like access (that is, the ability to view, edit, transfer, and delete records) to the accounts in that territory. Both accounts and users can exist in multiple territories. You can manually add accounts to territories, or you can define account assignment rules that assign accounts to territories for you.

You can also control users' access to the opportunities and cases associated with the accounts in the territory, regardless of who owns the records.

What Is a Territory Hierarchy?

Territories exist in a hierarchy which you can set up with as many nested levels as you wish. For example, you could create a top-level territory named "Worldwide Sales" that has the child territories "North America," "Europe/Middle East," "Latin America," "Africa," and "Asia/Australia." "North America" might have the child territories "Canada" and "United States." "United States" might have the child territories "Western," "Central," "Southern," and "Eastern." Finally, "Western" might have the child territories "California," "Oregon," "Washington," "Nevada," "Arizona," and "Utah."

Territory hierarchies do not have to be focused on geography; they can be defined however you like.

How Do Territories Affect Forecasting?

When you enable territory management for your organization, the territory hierarchy also becomes the forecast hierarchy. Your forecast data is derived from the opportunities that are associated with the accounts in your territories. Users have a different forecast for each territory to which they are assigned. For example, if you are assigned to both "California" and "Arizona," you have a separate forecast for the opportunities you have in each of these territories." See Viewing Customizable Forecasts.

Territory Fields

> 📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory has the following fields, listed in alphabetical order.

Field Name	Description
Account Access	Sets how much access territory members have to the territory's accounts: view only, view and edit, or view, edit, transfer and delete.
Case Access	Sets how much access territory members have to cases on the territory's accounts, regardless of who owns the cases: no access, view only, or view and edit.
Confine Opportunity Assignment	Select this checkbox to prevent the opportunities in this territory from being moved out of this territory and its child territories when account assignment rules are run.
Contact Access	Sets the level of access territory members have to contacts on the territory's accounts, regardless of who owns the contacts. The options are no access, view only, or view and edit.
Forecast Manager	The user to whom forecasts from child and lower-level territories roll up. Only modifiable by clicking **Change** on the territory detail page. If enabled via the Territory Settings page, a

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit territories:
- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Field Name	Description
	forecast manager can administer lower territories in the hierarchy.
Label	The name used to refer to the territory in any user interface pages.
Opportunity Access	Sets how much access territory members have to opportunities on the territory's accounts, regardless of who owns the opportunities: no access, view only, or view and edit.
Parent Territory	Territory immediately above this territory in the territory hierarchy. The parent territory must be an existing territory. Use the lookup icon to select the parent territory.
Sharing Groups	Read-only and only displays on the territory detail page. For every territory, two sharing groups are created; one for the territory, and another for the territory and its children. Click **Territory** to see the users who are in the sharing group for a territory. Click **Territory and Subordinates** to see the users who are in the sharing group for a territory and its children. Note: Users are listed as group members only when the group is used in sharing rules or manual record sharing.
Territory Name	The unique name used by the API and managed packages.
Territory Description	A description of the territory.

DEPLOYMENT PROCESS OVERVIEW

Use the following steps to deploy territory management for your Salesforce organization. For the most successful and complete results, perform the following procedures in order:

1. Prerequisites for Enabling Territory Management
2. Enabling Territory Management
3. Configuring Territory-Related Settings
4. Building a Territory Hierarchy
5. Assigning Users to Territories
6. Assigning Accounts to Territories

If you require assistance, please contact Customer Support.

PREREQUISITES FOR ENABLING TERRITORY MANAGEMENT

Your organization must meet the following prerequisites before enabling territory management:

Customizable Forecasting

Your organization must have customizable forecasting enabled before territory management can be turned on. If you do not know whether you have customizable forecasting, see Do I Have Customizable Forecasting?.

To learn about setting up customizable forecasting, see Setting Up Customizable Forecasting.

Additional tips about setting up customizable forecasting are available in the following PDF document: *Setting Up Customizable Forecasting*.

If you plan to deploy territory management immediately after enabling customizable forecasting, you do not need to build a forecast hierarchy. After you enable territory management, the territory hierarchy drives your forecast data.

> ⚠️ **Warning:** Your organization is not enabled for customizable forecasting until you click **Enable Customizable Forecasting** on the Forecasts Hierarchy page in Setup. The button is no longer available after customizable forecasting is enabled.

Sandbox

Your organization must have a sandbox in order to preview how territory management will affect your forecasts and record sharing. To learn about creating a sandbox, see Sandboxes on page 7.

Optimized Role Hierarchy

When enabling territory management, you have the option to create your territory hierarchy from your forecast hierarchy. Your forecast hierarchy is automatically derived from your role hierarchy when you enable customizable forecasting. We strongly recommend that you edit your organization's role hierarchy to accurately represent the territory hierarchy you plan to use. For example, if your sales departments are structured by company size, your hierarchy would look like this:
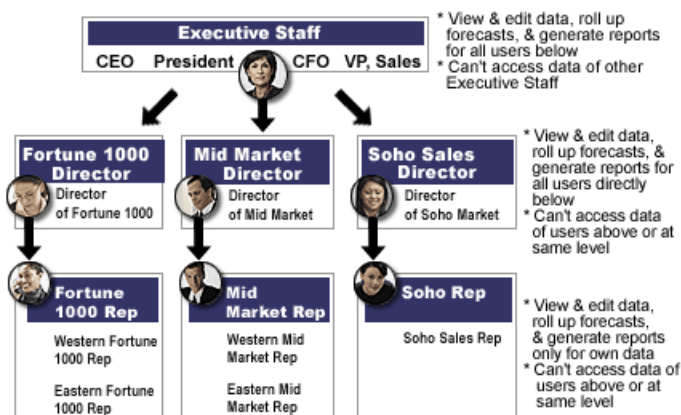
For more information on enabling your territory hierarchy, see Choosing an Enable Option on page 9. For more information on the role hierarchy, see "User Role Hierarchy" in the online help.

API

For information on creating Salesforce integrations with the Force.com API, visit Salesforce Developers.

Do I Have Customizable Forecasting?

> 📝 **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

Customizable forecasting may be difficult to distinguish because the tab name does not change when you convert to customizable forecasting. Here's how to tell if you have it:

Click the Forecasts tab.

- If you see either the **Introducing Customizable Forecasting** or **Request Now!** buttons, you don't have customizable forecasting.
- If you don't see either button, your organization already has customizable forecasting.

To enable customizable forecasting:

1. From Setup, enter `Forecasts (Customizable)` in the `Quick Find` box, then select **Forecasts Hierarchy**.
2. Select **Enable Customizable Forecasting**.
3. Once customizable forecasting is enabled, see Setting Up Customizable Forecasting.

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Setting Up Customizable Forecasting

> 📝 **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

Sales forecasts represent the best estimate of how much revenue you can generate. They give your managers and executives a view of your overall business no matter how dispersed your sales teams are.

Because forecasting is so universal, customizable forecasting is a flexible solution for even the most advanced requirements. Get started using customizable forecasting in Setup by entering `Forecasts (Customizable)` in the `Quick Find` box, then selecting **Forecasts (Customizable)**:

- Click **Edit Forecast settings for your company** to customize the default settings for your organization. See Define Customizable Forecast Settings.
- Click **Batch submit forecasts for your users** to set up batch submission. See Submit Customizable Forecasts in Batches.
- Click **Set up the forecasting hierarchy for your company** to set up your initial forecast hierarchy. Refer to Set Up Your Forecast Hierarchy.

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Sandboxes

Sandboxes create copies of your Salesforce org in separate environments. Use them for development, testing, and training, without compromising the data and applications in your production org.

Sandboxes are isolated from your production org, so operations that you perform in your sandboxes don't affect your production org, and conversely. Sandboxes are nearly identical to your production org. For a list of differences, see Sandbox Setup Considerations.

From Setup, enter `Sandboxes` in the `Quick Find` box, then select **Sandboxes** to view and manage your existing sandboxes or create new ones. For instructions, see Managing Sandboxes.

Sandbox Types

Developer Sandbox

A Developer Sandbox is intended for development and testing in an isolated environment. A Developer Sandbox includes a copy of your production org's configuration (metadata).

Developer Pro Sandbox

A Developer Pro Sandbox is intended for development and testing in an isolated environment and can host larger data sets than a Developer Sandbox. A Developer Pro Sandbox includes a copy of your production org's configuration (metadata). Use a Developer Pro Sandbox to handle more development and quality assurance tasks and for integration testing or user training.

Partial Copy Sandbox

A Partial Copy Sandbox is intended to be used as a testing environment. This environment includes a copy of your production org's configuration (metadata) and a sample of your production org's data as defined by a sandbox template. Use a Partial Copy Sandbox for quality assurance tasks such as user acceptance testing, integration testing, and training.

Full Sandbox

A Full Sandbox is intended to be used as a testing environment. Only Full sandboxes support performance testing, load testing, and staging. Full Sandboxes are a replica of your production org, including all data, such as object records and attachments, and metadata. The length of the refresh interval makes it difficult to use Full sandboxes for development.

We recommend that you apply a sandbox template so that your sandbox contains only the records that you need for testing or other tasks.

When you create a Full sandbox, you also have to decide how much field tracking history and Chatter activity to include.

- The default is to omit field tracking, but you can include up to 180 days of field tracking. If you track field history for many objects in your production org, specify fewer days to avoid generating an excessive amount of data.

- Chatter activity data can be extensive, which can add a significant amount of time to your Full sandbox copy.

Limit the amount of field history that you copy, and copy your Chatter data only if you need it for your testing use cases.

Sandbox Templates Tab

If you have purchased a license for Partial Copy or Full sandboxes, this tab lists any templates you have created.

Create a Sandbox Data Template, create a sandbox from a template, edit or delete a template, or click the template name for more information. For more information about creating a Sandbox Data Template, see Create or Edit Sandbox Templates.

Sandbox History Tab

This tab displays a log of your sandbox creation and a history of refreshes, including when sandboxes were created and who created them. This tab provides information only. To view or edit an existing sandbox, use the Sandbox tab.

Sandbox Licenses

You purchase licenses for each sandbox type and can purchase multiple licenses of each type. Sandbox licenses are hierarchical. Specifically, the following table shows the type of sandbox you can create with each license:

	Full Sandbox license	Partial Copy Sandbox	Developer Pro Sandbox license	Developer Sandbox license
Allows you to create:				
Developer sandbox type	✔	✔	✔	✔
Developer Pro sandbox type	✔	✔	✔	
Partial Copy sandbox type	✔	✔		
Full sandbox type	✔			

License stages are:

Available

   The displayed value represents the number of sandboxes that you've purchased but haven't used.

In use

   The displayed value represents the number of sandboxes that you've purchased and used.

📝 Note: If you don't see a sandbox option or need licenses for more sandboxes, contact Salesforce to order sandboxes for your org.

When your sandbox licenses expire, your existing sandboxes are subject to certain restrictions. See Sandbox License Expiration for resolution of license expiration issues.

Understanding Sandbox Refresh Intervals

The refresh interval for each sandbox environment is calculated from when the actual sandbox copying process begins. The sandbox status changes from Pending to Processing at the start of copying.

If other sandbox copy requests were made before yours, your sandbox sometimes remains in the Pending status for some time. The refresh interval timer for your sandbox doesn't start until your request leaves this state.

ENABLING TERRITORY MANAGEMENT

Enable territory management for your organization using the following steps:

1. Request territory management from Salesforce.

2. Set organization-wide territory management options.

3. Click the appropriate enable option for your implementation.

Requesting Territory Management for Your Organization

Territory management is only available upon request. Please contact your sales representative or log a case from the Help & Training window to submit your request to Salesforce.

Configure Territory Management Settings

> 📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can set default account, contact, opportunity, and case access levels for new territories, as well as whether forecast managers can administer the territories located below them in the territory hierarchy.

1. From Setup, enter `Territory` in the `Quick Find` box, then select **Territory Settings**.

2. Choose default access levels for accounts, contacts (depending on your organization-wide default setting), opportunities, and cases. These are the access levels that will be selected by default when a new territory is created. For descriptions of these fields, see Territory Fields.

   > 📝 **Note:** These settings are not retroactive and do not affect territories that already exist.
   >
   > When creating or editing an individual territory, you can override these default access levels. See Create Territories.

3. Optionally, check `Forecast managers can manage territories`. When this box is checked, forecast managers can administer subordinate territories: they can manage users, manually add accounts, and manage account assignment rules for territories that are below their immediate territory. Also, they can add child territories to both their immediate territory and lower territories. To learn more about forecast managers, see Assigning Forecast Managers in Your Forecast Hierarchy.

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USER PERMISSIONS

To configure territory settings:
- "Manage Territories"

Choosing an Enable Option

Review these steps to determine the best enable option for your organization:

1. In Salesforce, from Setup, enter `Territory` in the `Quick Find` box, then select **Territory Settings**.

2. There are two different options for enabling territory management, which depend on your preference to retain or purge pre-existing forecast data. Click either **Enable Territory Management** or **Enable Territory Management from Scratch**.

What the Enable Territory Management Button Does

When you click this button, your organization's current forecast hierarchy and forecast data are automatically copied to the territory hierarchy as follows:

- The name of your organization is set as the top of the territory hierarchy.

- For each role in the forecast hierarchy, a corresponding territory is created in the new territory hierarchy.

- Manual forecast sharing settings on the roles are copied to the new territory. For more information on manual forecast sharing, see Manually Sharing a Forecast.

- Active Salesforce users are added to territories based on their roles.

- Opportunities are assigned to the opportunity owner's territory.

- Accounts are not assigned anywhere in the territory hierarchy.

- Until you add or edit territories, your forecasts work the same as they did before you enabled territory management.

What the Enable Territory Management from Scratch Button Does

When you click this button, the following occurs:

- All pre-existing forecast data is deleted.

- An empty territory hierarchy is created.

Using this button is only recommended when you are setting up a brand new organization in Salesforce that does not have an existing forecast hierarchy.

> ⚠ Warning: *Irreversible data loss* can result from clicking **Enable Territory Management from Scratch**.

3. Click the appropriate enable option.

After enabling territory management, the following options are available in Setup:

- **Manage Territories**
- Object management settings for **Territories**

CONFIGURING TERRITORY-RELATED SETTINGS

After enabling territory management, make the following setup changes:

Accounts

- From the object management settings for accounts, go to Page Layouts and add the `Territories` and `Exclude from territory assignment rules` fields to account page layouts. For each account page layout, you can set whether users can choose to run account assignment rules when they save accounts. You can also set whether account assignment rules run by default whenever accounts are saved.:

Opportunities

- From the object management settings for opportunities, go to Page Layouts and add the `Territory` field to opportunity page layouts.

User Permissions

- To allow a user to be an administrator of the territory hierarchy, grant them the "Manage Territories" permission using permission sets or profiles. Users that had the "Customize Application" permission before you enabled territory management are automatically given the "Manage Territories" permission.

Custom Fields

Add custom fields to territories. For more information, see Create Custom Territory Fields.

Reports

Modify and recreate reports as necessary. See Territory Reports and Creating a Custom Report.

Sharing Rules

Modify sharing rules as necessary to include users in territories. See Sharing Rules.

Set Up Public Groups and Queues

Configure public groups and queues as necessary to include users in territories. See What Is a Group? and Create Queues.

Folders

Configure folder visibility options as necessary to include users in territories. See Creating and Editing Folders.

List Views

Configure account, contact, opportunity, case, and other custom list views as necessary. Remember to set the appropriate public visibility option for any new list views you create. See Create a List View in Salesforce Classic.

Create Custom Territory Fields

You can add up to 500 custom territory fields to tailor territories for your company's unique requirements.

📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

From the object management settings for territories, go to the fields area. From this area, you can view details of standard fields, create or edit custom fields, or define field dependencies.

📝 **Note:** Territories don't have customizable page layouts. New custom fields are added in alphabetical order at the bottom of the territory detail page.

BUILDING A TERRITORY HIERARCHY

Building Your Territory Hierarchy

> 📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

> 📝 **Note:** If you clicked the **Enable Territory Management** button to enable territory management, your existing forecast hierarchy was used as the basis of the territory hierarchy.

To work with your organization's territory hierarchy, from Setup, enter `Hierarchy` in the `Quick Find` box, then select **Territory Hierarchy**. The following terms are used when referring to territories in the hierarchy.

Parent Territory
A territory that is located immediately above another territory in the hierarchy. A territory has exactly one parent territory in the hierarchy, except for the top-level territory which does not have a parent.

Child Territory
A territory that is immediately below another territory in the hierarchy. A parent territory can have an unlimited number of child territories.

Sibling Territory
Child territories that share the same parent territory.

Choose an option from the drop-down list to change how the territory hierarchy is displayed:

Show in tree view
See a visual representation of the parent-child relationships between your territories. Click **Expand All** to see all territories, or **Collapse All** to see only top-level territories. To expand or collapse an individual node, click the plus (+) or minus (-) icon.

Show in sorted list view
See a territory list that you can sort alphabetically by territory name, parent territory (**Reports to**), or description.

To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

Show in list view
See a list of territories and their children, grouped alphabetically by the name of the top-level territory. The columns are not sortable. This view is not available for hierarchies with more than 1,000 territories.

Each view provides links for you to create, edit, and delete territories.

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 territories:
- "View Setup and Configuration"

To edit territories:
- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Create Territories

📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can create up to 500 territories for your organization. To create a new territory:

1. From Setup, enter `Hierarchy` in the `Quick Find` box, then select **Territory Hierarchy**.

2. Click **Add Territory**. You can also click **Add Territory** from the Child Territories related list of a territory detail page.

3. Define the new territory by entering or changing fields. For descriptions of territory fields, see Territory Fields.

   The required standard fields for territories are `Label`, `Territory Name`, and `Parent Territory`. Territories can also have custom fields. For more information, see Create Custom Territory Fields.

4. Click **Save** to finish or **Save & New** to create more territories.

ASSIGNING USERS TO TERRITORIES

Manage Users in Territories

✏️ **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory can have an unlimited number of users, and a user can be assigned to an unlimited number of territories.

In the context of a specific territory, users have both an `Active` status and an `Active in Territory` status:

Active

An active user is able to log in to Salesforce.

Deactivated users, such as employees who are no longer with your company, are disabled from logging in to Salesforce. Deactivated users continue to own opportunities and appear in forecasts and territories. When users are deactivated, their opportunity forecast overrides, adjusted total overrides, and manager's choice overrides on subordinates' forecasts are frozen. However, the manager of a deactivated user can apply manager's choice overrides to that user's forecasts. Rollup amounts are kept current. If a deactivated user is later reactivated, the user can resume normal work as before. If "Allow Forecasting" is disabled for a user who is deactivated, the user is removed from any territories he or she is assigned to.

Users can set their active status by modifying their personal information page in their personal settings.

Active in Territory

Users with `Active in Territory` checked on the territory detail page have open opportunities, closed opportunities, or no opportunities at all in that territory. Users with `Active in Territory` deselected have been transferred out of or removed from the territory, but retain ownership of opportunities in the old territory.

To view the territories to which you belong, view the Territories related list on your personal information page. To view this related list for any user, from Setup, enter `Users` in the `Quick Find` box, then select **Users**.

Adding Users to Territories

To add users to a territory:

1. From a territory detail page, click **Add Users**.

2. To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.

3. Select and deselect checkboxes in the Action column to move users between the Available and Selected areas. Also, you can:
   - Click a letter to view users who correspond to that letter.
   - Click **All** to display all users who match the criteria of the current view.
   - Click **select shown** to move all users that are shown on the current list page to the Selected area below.
   - Click **deselect shown** or **deselect all** to move users from the Selected area to the Available area.

> ✏️ **Note:** Users already assigned to the territory will not appear in the Available users list even if they meet the list view criteria.

4. When the Selected area includes all users that you want to assign to the territory, click **Assign**.

Removing Users from Territories

You can remove a user from a territory and choose who will receive his or her open opportunities:

1. In the Assigned Users related list on the territory detail page, click **Remove** next to the user's name.

2. Click the `New Owner` lookup icon (🔍) to select a recipient for any open opportunities the user may have.

3. Alternatively, leave the `New Owner` field blank. One of the following results will occur:

- If the parent territory has a forecast manager, then that forecast manager takes ownership of the user's open opportunities. Also, the forecast manager is assigned to the territory with `Active in Territory` unchecked.
- If the parent territory does not have a forecast manager, then the user remains in the territory with `Active in Territory` unchecked.

4. Click **Save**.

If very large amounts of data are affected, you will be sent a confirmation email when the operation has completed.

Transferring Users Between Territories

The user transfer wizard allows you to move a user from one territory to another, choose which open opportunities the user will continue to own, and designate a recipient for open opportunities the user leaves behind.

To transfer a user to another territory:

1. In the Assigned Users related list on the territory detail page, click **Transfer** next to the user's name.

2. Click **Select** next to the territory to which you are transferring the user. If necessary, expand or collapse nodes in the territory hierarchy to display the desired destination territory.

3. Click the `New Owner` lookup icon (🔍) to select the user who will take ownership of the open opportunities that the transferred user does not keep. Click **Next** to proceed.

If you skip this step and choose not to select a recipient, the forecast manager of the parent territory of the user's former territory automatically receives the open opportunities that the user does not keep. If there is no forecast manager in the parent territory of the user's former territory, then the user being moved retains ownership of his or her opportunities.

4. Choose a list view of the user's open opportunities.

5. Click **Select** and **Deselect** to move opportunities between the Available and Selected areas. Also, you can:

- Click a letter to view opportunities that correspond to that letter.
- Click **All** to display all opportunities that match the criteria of the current view.
- Click **select shown** to move all opportunities that are shown on the current list page to the Selected area below.
- Click **deselect shown** or **deselect all** to move opportunities from the Selected area to the Available area.

6. When the Selected area shows the opportunities that you want the user to retain after the transfer, click **Transfer**.

If very large amounts of data are affected, you will be sent a confirmation email when the operation has completed.

Note: If you transfer the forecast manager out of a territory, that territory will no longer have a forecast and any opportunity overrides for that territory that were created by forecast managers above it in the territory hierarchy will be deleted. See Overriding Customizable Forecasts.

Add Forecast Managers to Territories

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Consider the following before assigning the forecast manager for a territory:

- A territory can have only one forecast manager. See Assigning Forecast Managers in Your Forecast Hierarchy.
- Forecasts from child and lower-level territories roll up to forecast managers.
- If a territory has no forecast manager, there is no forecast for that territory.
- Forecast managers can receive opportunities when users are transferred out of or removed from a territory.
- Forecast managers can receive opportunities when account assignment rules are run.
- On the territory settings page, you can enable forecast managers to act as delegated administrators for territories below them in the hierarchy.

To assign or change the forecast manager for a territory:

1. On the territory detail page, click **Change** next to the `Forecast Manager` field.

2. Select a name from the drop-down list to specify the territory's forecast manager.

   On the right, a tree view of the territory hierarchy allows you to see the child and lower-level territories whose forecasts will roll up to the forecast manager.

3. Click **Save** to finish.

ASSIGNING ACCOUNTS TO TERRITORIES

Managing Account Assignment Rules

📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can create account assignment rules that automatically move accounts and their associated opportunities and cases into territories based on any standard or custom account field, such as zip code, state, industry, revenue, or number of employees. Each rule consists of multiple rows of criteria that specify exactly how the accounts are assigned.

Account assignment rules are governed by the following:

- A territory can have inherited account assignment rules, meaning that the rules were created somewhere higher in the territory hierarchy and consequently also impact the given territory.
- A territory can have locally defined account assignment rules, meaning that the rule was created at the given territory.
- If a territory doesn't have any inherited or locally-defined account assignment rules, then it only contains accounts that were manually added.
- If an account matches all inherited and locally-defined account assignment rules for multiple territories on the same branch of the hierarchy, then the account is assigned to the lowest matching territory.
- If an account matches a territory's inherited account assignment rules but not all of the territory's locally-defined rules, then the account isn't assigned to the territory, but is evaluated for child territories.

For example, you have three territories:

- Territory A has four rules marked "Apply to child territories", and is a parent of territory B.
  - Territory B has three rules not marked "Apply to child territories", and is a parent of territory C.
    - Territory C has two rules.

If you assign an account that matches all of territory A's and territory C's rules but only one of territory B's rules, then the account is assigned to territory C. However, if territory B's rules are marked "Apply to child territories," then the account is assigned only to territory A.

Working with Account Assignment Rules

Click **Run Rules** on the territory detail page to evaluate the active inherited, locally defined rules shown on the page against all existing accounts in your organization. The rules for all subordinate territories are also evaluated—that is, when you run rules on the top-level territory, all rules in the entire hierarchy are evaluated. When you click **Run Rules**, an icon (🖼) displays next to the button for all affected territories to indicate that rules are being processed. An email confirmation is sent when processing is complete.

📝 **Note:** To protect data quality, you can't modify a territory while the processing icon displays.

Click **Manage Rules** on the territory detail page to access the Manage Account Assignment Rules page, where you can create, edit, preview, and run account assignment rules:

- Click **New** to create a new rule, or **Edit** to edit an existing rule. See Create and Edit Account Assignment Rules.
- Use the `Active` checkbox to set a locally-defined rule as active or inactive.

  Active account assignment rules automatically evaluate accounts and assign them to territories when:

  – An account is created using the Salesforce user interface, the Force.com API, or a client such as Connect Offline.
  – An account is imported using an import wizard.
  – An account is created by the conversion of a lead.
  – An account is edited and saved if the `Select by default` checkbox is selected for the "`Evaluate this account against territory rules on save`" checkbox option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.
  – An account is edited and saved via the Force.com API.
  – **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
  – **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
  – Duplicate accounts are merged.

- Click a rule name to see the details of that rule, including its active status and criteria. From a rule detail page you can edit, delete, or clone a rule.
- Click **Preview** to see the accounts that would be assigned to this territory and its child territories if the rules currently marked active were run. See Preview Account Assignments.
- Click **Save** to save the current active status of locally-defined rules.
- Click **Save & Run Rules** to save the current active status of locally-defined rules and evaluate the inherited and locally-defined rules shown on the page against all existing accounts in your organization. Running account assignment rules affects accounts in the Recycle Bin.

Click **Edit** on the territory detail page to toggle the `Confine Opportunity Assignment` checkbox. When it is selected, the territory's opportunities remain in the territory or its child territories when you run account assignment rules. The following exceptions apply:

- If an opportunity's account moves to only one of the territory's children, then the opportunity follows the account and is reassigned to the account's new territory. This includes when an account moves to multiple territories and only one of the new territories is a child of the original territory.
- If an opportunity's account moves to more than one of the territory's children, then the opportunity's territory field is set to blank.
- If an opportunity's account moves completely out of the territory and its children, then the opportunity's territory field is set to blank.

  Tip: You can also manage account assignment rules using the Data Loader or the Web services API.

Account Assignment Rules and Opportunities

Several factors determine how account assignment rules assign opportunities to territories, including:

- Whether the account associated with the opportunity is assigned to one or more territories
- Whether the opportunity owner is a member of the same territory as the account
- The number of users assigned to the territory
- Whether a forecast manager is assigned to the territory

> **Note:** If you're updating an account which triggers an account assignment rule that is part of territory management, you must have transfer access on the opportunity if the account assignment rule initiates a change in the opportunity ownership.

Accounts with One Territory

If the account associated with the opportunity is assigned to only one territory, use the following table to determine how the opportunity's territory is assigned:

Opportunity Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
Yes	1	N/A	The opportunity is assigned to the same territory as the account. The opportunity owner is unchanged.
No	1	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is the sole member of the territory.
No	0	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is added as an inactive member of the territory. The owner of the opportunity remains unchanged.
Yes	>1	Yes	The opportunity is assigned to the same territory as the account and the forecast manager becomes the opportunity owner.
Yes	>1	No	The opportunity is assigned to the same territory as the account. The owner of the opportunity remains unchanged if the opportunity owner has `Active in Territory` selected on the territory detail page.
No	>1	Yes	The opportunity is assigned to the forecast manager of the territory.
No	>1	No	The opportunity is assigned to the same territory as the account and the opportunity owner is added as an inactive member of the territory. The owner of the opportunity remains unchanged.

Accounts with Multiple Territories

If the account associated with the opportunity is assigned to more than one territory, use the following table to determine how the opportunity's territory is assigned:

Opportunity Owner's Territory Membership	Results
Opportunity owner has one territory in common with the account	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to the territory that he or she has in common with the account.

Opportunity Owner's Territory Membership	Results
Opportunity owner has more than one territory in common with the account	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
Opportunity owner has no territories in common with the account	The opportunity is not assigned to any territories. The opportunity owner cannot assign the opportunity to any territories.

Territory Assignments for Standard Users

If the user creating the opportunity is a standard user, Salesforce automatically assigns a territory to a new opportunity only if the user and account have exactly one territory in common. For example, James, who is a standard user assigned to the Westlake territory only, creates an opportunity on the Filmore, Inc. account. Filmore, Inc. belongs to the Westlake territory and one other territory. Because James and Filmore, Inc., have exactly one territory in common, the new opportunity is assigned to the Westlake territory. If James belonged to the account's other territory, the opportunity would not be assigned to a territory.

Use the following table to determine when a territory will be assigned to an opportunity created by a standard user.

Number of Territories Assigned to User	Number of Territories Assigned to Account	Opportunity Owner Belongs to Same Territory as Account	Results
1	1	Yes	The opportunity is assigned to the territory in common.
>1	1	Yes	The opportunity is assigned to the account's territory if the user belongs to that same territory.
1	>1	Yes	The opportunity is assigned to the user's territory if the account is associated with that same territory.
>1	>1	Yes	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
N/A	N/A	No	The opportunity is not assigned to any territories.

Territory Assignments for Administrators

A user who is an administrator or has "Manage Territories" permission can view all territories.

If the user is an administrator, a territory-delegated administrator, or a user with the "Manage Territories" permission, Salesforce automatically assigns a territory to a new opportunity only if the administrator, the account, and the account's parent accounts have exactly one territory in common. For example, Jennifer is an administrator who manages the Northlake and Westlake territories. She creates an opportunity on the Richmond Brothers account. Richmond Brothers is associated with the Northlake and Southlake territories. Richmond Brothers has one parent account, Zyman Products, which is assigned to the Northlake and Eastlake territories. Because Jennifer, Richmond Brothers, and Zyman Products have only the Northlake territory in common, the new opportunity is assigned to the Northwest territory. If Richmond Brothers or Zyman Products also belonged to the Westlake territory, the opportunity would not be assigned to a territory.

Use the following table to determine when a territory will be assigned to an opportunity created by an administrator.

Number of Territories Administrator Manages	Number of Territories Assigned to Account	Number of Territories Assigned to Account's Parent Account(s)	Opportunity Owner Manages Same Territory as Account and Parent Account(s)	Results
1	1	1	Yes	The opportunity is assigned to the territory in common.
>1	1	1	Yes	The opportunity is assigned to the territory in common.
1	>1	1	Yes	The opportunity is assigned to the territory in common.
1	1	>1	Yes	The opportunity is assigned to the territory in common.
>1	>1	1	Yes	The opportunity is assigned to the parent account's territory if the administrator and the account have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
1	>1	>1	Yes	The opportunity is assigned to the administrator's territory if the account and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
>1	1	>1	Yes	The opportunity is assigned to the account's territory if the administrator and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
>1	>1	>1	Yes	The opportunity is assigned to the administrator's territory if the administrator, the account, and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account.
N/A	N/A	N/A	No	The opportunity is not assigned to any territories.

Assigning Opportunities to Territories

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

An opportunity can be assigned to a territory when the opportunity is created—either manually or during lead conversion—or when account assignment rules run that affect existing opportunities. This topic includes the following sections:

- Territory Assignment for Manually Created Opportunities
- Territory Assignment for Converted Leads
- Notes About Territory Assignment for Opportunities

Territory Assignment for Manually Created Opportunities

When an opportunity is created from the Opportunities tab or from the Quick Create area on the sidebar, Salesforce compares the territories associated with the opportunity's account to the territories that the opportunity owner is a member of:

- If there is a single territory that both the account and the opportunity owner belong to, the opportunity is assigned to that territory if "Evaluate this account against territory rules on save" is selected.
- If more than one territory is common to both the account and the opportunity owner, the opportunity is not automatically assigned to any territory. The opportunity owner must manually assign a territory to the opportunity.
- If no territory is common to both the account and the opportunity owner, the opportunity owner cannot assign the opportunity to a territory.

Territory Assignment for Converted Leads

When a lead is converted to an opportunity, that opportunity's territory assignment depends on several factors, including:

- Whether the account associated with the opportunity is assigned to one or more territories
- Whether the lead owner is a member of the same territory as the account
- The number of users assigned to a territory
- Whether a forecast manager is assigned to the territory

If the account associated with the opportunity is assigned to only one territory, use the following table to determine how the opportunity's territory is assigned:

Lead Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
Yes	1	N/A	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner.

Lead Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
No	1	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is the sole member of the territory.
No	0	N/A	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner. The lead owner is added as an inactive member of the territory.
Yes	>1	Yes	The opportunity is assigned to the same territory as the account and the forecast manager becomes the opportunity owner.
Yes	>1	No	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner.
No	>1	Yes	The opportunity is assigned to the forecast manager of the territory.
No	>1	No	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner. The lead owner is added as an inactive member of the territory.

If the account associated with the opportunity is assigned to more than one territory, use the following table to determine how the opportunity's territory is assigned:

Lead Owner's Territory Membership	Results
Lead owner has one territory in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner can assign the opportunity to the account's territory.
Lead owner has more than one territory in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
Lead owner has no territories in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner cannot assign the opportunity to any territories.

Notes About Territory Assignment for Opportunities

- The following actions do not change an opportunity's territory:

    - Manually assigning the opportunity's account to a territory

    - Changing which account is associated with the opportunity

    - Changing the account's territory as a result of account assignment rules if the opportunity and its account are in different territories

    - Transferring the opportunity to a new owner

- Territory assignment rules do not update an opportunity if the opportunity's `Close Date` is before the current date and the opportunity's `Stage` is *Closed Won* or *Closed Lost*.

- When an opportunity is not automatically assigned to a territory, we recommend that users be notified if the opportunity is not assigned to a territory manually within one day. You can set up time-based workflow to notify users about unassigned opportunities.

- Restoring an account or opportunity from the Recycle Bin restores the territory assignment, but it does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are inconsistent with the new rules.

- When opportunities are transferred from one user to another, whether individually or as a group, the territory assignment on the opportunities is unaffected. However, if the opportunities are assigned to a user who is not already a member of the opportunity's territory, that user is added as an inactive member of the territory.

- When users are removed from a territory, you can specify who should receive their open opportunities. Also, when users are transferred from one territory to another, you can specify which opportunities the users should continue to own and select a recipient for any remaining opportunities. If you do not specify a recipient:

    - If the parent territory has a forecast manager, the forecast manager takes ownership of the user's open opportunities. The forecast manager is assigned to the territory and `Active in Territory` is unchecked.

    - If the parent territory does not have a forecast manager, the user remains in the territory and `Active in Territory` is unchecked.

Create and Edit Account Assignment Rules

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory can have a maximum of 15 account assignment rules, including both active and inactive rules. To create or edit an account assignment rule:

1. From Setup, enter `Hierarchy` in the `Quick Find` box, then select **Territory Hierarchy**.

2. Select the territory you want to modify.

3. Click **Manage Rules** in the Account Assignment Rules related list.

4. Click **New** to create a new account assignment rule. To edit an existing account assignment rule, click **Edit**.

5. Enter a name for the rule. Rule names must be unique and can have a maximum of 80 characters.

6. Define filter criteria that accounts must match to be included in the territory.

   If your organization uses multiple languages, use your organization's default language when specifying your criteria. When you use picklists to specify filter criteria, the selected values are stored in the organization's default language. If you edit or clone existing filter criteria, first set the `Default Language` on the Company Information page to the same language that was used to set the original filter criteria. Otherwise, the filter criteria may not be evaluated as expected.

7. Optionally, check the `Apply to child territories` box that makes the rule applicable to child territories

8. Optionally, check the `Active` box to activate the rule. Inactive rules never run.

   Active account assignment rules automatically evaluate accounts and assign them to territories when:

   - An account is created using the Salesforce user interface, the Force.com API, or a client such as Connect Offline.
   - An account is imported using an import wizard.
   - An account is created by the conversion of a lead.
   - An account is edited and saved if the `Select by default` checkbox is selected for the "`Evaluate this account against territory rules on save`" checkbox option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.
   - An account is edited and saved via the Force.com API.
   - **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
   - **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
   - Duplicate accounts are merged.

9. Click **Save** to finish, or **Save & New** to save the rule and begin defining another rule.

Tip: By creating at least one account assignment rule at the top of your territory hierarchy that applies to child territories, you can build a hierarchy where all accounts match the top-level criteria and subordinate territories differentiate accounts by more specific criteria.

Similarly, if your organization uses divisions, create a rule at the top of your territory hierarchy that filters accounts by division and applies to child territories.

Preview Account Assignments

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Before running account assignment rules, preview a list of the accounts that would be assigned to the territory and territories below it in the territory hierarchy if the rules currently marked active were run:

1. From the territory detail page, click **Manage Rules** > **Preview**.

2. Click **Save** to save the active status of the rules. Click **Save & Run Rules** to save the active status of the rules and evaluate the rules against all existing accounts in your organization.

Note: Running account assignment rules affects accounts in the Recycle Bin.

Manually Assign Accounts to Territories

> 📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

As an alternative to creating and running account assignment rules, you can add accounts to territories manually:

1. On the territory detail page, click **Add Accounts** on the Manually Assigned Accounts related list.

2. Choose a view from the drop-down list, or click **Create New View** to build a new custom view.

3. Click **Select** and **Deselect** to move accounts between the Available and Selected areas. Also, you can:

   - Click a letter to view accounts that correspond to that letter.

   - Click **All** to display all accounts that match the criteria of the current view.

   - Click **select shown** to move all accounts that are shown on the current list page to the Selected area below.

   - Click **deselect shown** or **deselect all** to move accounts from the Selected area to the Available area.

4. When the accounts in the Selected area includes all accounts that you want to manually add to the territory, click **Assign**.

> 📝 **Note:** Manually adding accounts and running account assignment rules are completely independent. A manually added account remains in a territory until it is manually removed. There is nothing to prevent assignment rules also adding the account to the territory.

TERRITORY MANAGEMENT FAQ

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

- How does Salesforce handle territory management?
- Are opportunities transferred to different users when account assignment rules are run?
- Are the territory hierarchy and the role hierarchy different?
- How are opportunities assigned to territories?
- How do manually assigned accounts differ from those assigned by account assignment rules?
- How does opportunity confinement work?
- Must I be assigned to the same territories as the opportunities I own?
- What happens when I undelete an account or opportunity that was assigned to a territory?
- What kinds of records have territories?
- When do account assignment rules evaluate accounts?

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EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud
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What kinds of records have territories?

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Accounts, opportunities, and users have territory fields. Accounts and users can be associated with multiple territories. An opportunity can be associated with only one territory.

Are the territory hierarchy and the role hierarchy different?

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Yes. The territory hierarchy and the role hierarchy are independent. See the following comparison:

Territory Hierarchy	Role Hierarchy
Is available by contacting Salesforce	Is available by default
Determines forecasts	Has no impact on forecasting when territory management is enabled
Supports assigning a user to multiple territories	Supports assigning a user to only one role
Affects account and opportunity reports	Affects all other reports
Grants access to records regardless of ownership. Users receive whatever access is most permissive across both hierarchies.	Grants access to records based on ownership. Users receive whatever access is most permissive across both hierarchies.

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Territory Management FAQ

How do manually assigned accounts differ from those
assigned by account assignment rules?

How do manually assigned accounts differ from those assigned by account assignment rules?

📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Manually assigned accounts are not evaluated when running account assignment rules. After they have been manually assigned to a territory, they remain there until they are manually removed from the territory.

When do account assignment rules evaluate accounts?

📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Active account assignment rules automatically evaluate accounts and assign them to territories when:

- An account is created using the Salesforce user interface, the Force.com API, or a client such as Connect Offline.
- An account is imported using an import wizard.
- An account is created by the conversion of a lead.
- An account is edited and saved if the `Select by default` checkbox is selected for the "`Evaluate this account against territory rules on save`" checkbox option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.
- An account is edited and saved via the Force.com API.
- **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
- **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
- Duplicate accounts are merged.

How are opportunities assigned to territories?

📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Opportunities are automatically assigned to territories based on the following actions.

- Creating a new opportunity
- Running account assignment rules

    When account assignment rules are run, opportunities are automatically assigned to the same territory as the account when:

    - An opportunity does not have a territory and its account is added to a territory.
    - An account moves from one territory to another. However, if an account assignment rule prohibits opportunities from moving outside a given part of the territory hierarchy, the opportunities do not move and no longer belong to any territories.

    Opportunities are not automatically assigned to the same territory as the account when:

    - An account is removed from a territory and not reassigned to a new territory in the same operation. The account's opportunities from the original territory no longer belong to any territories.
    - An account is reassigned to multiple territories in one operation. The account's opportunities from the original territory no longer belong to any territories, unless the `Confine Opportunity Assignment` checkbox is checked.

Territory Management FAQ

Must I be assigned to the same territories as the opportunities
I own?

> **Note:** If the opportunity owner is not part of the new territory, he or she is added as an inactive member of the territory.

The following actions do not change an opportunity's territory.

- Manually assigning the opportunity's account to a territory
- Changing which account is associated with the opportunity
- Changing the account's territory as a result of account assignment rules if the opportunity and its account are in different territories
- Transferring the opportunity to a new owner.

Must I be assigned to the same territories as the opportunities I own?

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

When an open opportunity is assigned to you and you do not belong to that opportunity's territory, you are assigned to the territory with `Active in Territory` unchecked in the Assigned Users related list of the territory.

Are opportunities transferred to different users when account assignment rules are run?

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

When account assignment rules cause an opportunity to be reassigned to a territory to which you already belong, you automatically become the owner of that opportunity when you meet any of the following criteria:

- You are the only member of the territory.
- You are the only forecast manager in the territory.
- You are the only territory member enabled for forecasting.

If none of these criteria are met, the original opportunity owner is added to the territory as an inactive member.

How does opportunity confinement work?

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

If the `Confine Opportunity Assignment` checkbox is selected for a territory, the territory's opportunities remain in the territory or its child territories when you run account assignment rules. The following exceptions apply:

- If an opportunity's account moves to only one of the territory's children, then the opportunity follows the account and is reassigned to the account's new territory. This includes when an account moves to multiple territories and only one of the new territories is a child of the original territory.
- If an opportunity's account moves to more than one of the territory's children, then the opportunity's territory field is set to blank.
- If an opportunity's account moves completely out of the territory and its children, then the opportunity's territory field is set to blank.

Territory Management FAQ

What happens when I undelete an account or opportunity
that was assigned to a territory?

What happens when I undelete an account or opportunity that was assigned to a territory?

📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Undeleting an account or opportunity restores the territory assignment, but does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are not consistent with the new rules.

Why can't I use Territory Management?

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Territory Management is available for Customizable Forecasting and not Collaborative Forecasts.

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