Salesforce Maps Territory Planning Implementation Guide

Salesforce, Spring '23

@salesforcedocs

Last updated: February 23, 2023

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SALESFORCE MAPS TERRITORY PLANNING SETUP

Get your sales and service teams on the path to visualizing territory boundaries and eliminating gaps in coverage.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

Welcome to Salesforce Maps Territory Planning

Improve sales and service coverage using Territory Planning, which helps your teams design territories that improve employee morale with equitable and efficient assignments.

Key Concepts for Territory Planning

Read about relevant concepts before you take steps to implement Salesforce Maps Territory Planning.

Preparing for Territory Planning

Get systems, processes, and people in place before you import data and create your territory models in Salesforce Maps Territory Planning. Before you begin, confirm that you installed Salesforce Maps and gave users access to it and to Territory Planning.

Defining Records and Fields for Your Datasets

Identify the data that you want to include in your datasets, such as location and account ownership details. Next, you create custom report types, add fields that include the data, and set values for any default fields you want. You then create datasets in Salesforce Maps Territory Planning from reports that you run using your custom report types.

Creating Datasets

Import Salesforce data into Salesforce Maps Territory Planning from reports that you run using your custom report types and SOQL queries that you write.

Creating and Publishing Alignments

Model territories in alignments that you create using your datasets in Salesforce Maps Territory Planning. Then publish your alignments to Enterprise Territory Management, Salesforce Maps, or Field Service. Update the Salesforce fields of your choice with revised territory data and gather feedback on alignments from leadership.

Controlling Access to Datasets and Alignments

Keep managers focused on designing territories in the areas that leadership assigns to them in Salesforce Maps Territory Planning. Ensure privacy among your managers when you provide everyone access to only their respective areas. Share a dataset and all of its alignments with specific users and choose the level of involvement that you want them to have.

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What's Salesforce Maps Territory Planning?

Territory Planning helps you design optimal territories for sales and service teams. Compare scenarios that help you close gaps in sales and service coverage, distribute the workload fairly, and maintain balanced territories. You choose the best scenario to establish your territory model.

How Territory Planning Helps Drive Sales and Service

Create an equitable division of sales opportunities and service requests among your reps using Salesforce Maps Territory Planning. Optimized territories deliver improved sales and service, reduced operating costs, and higher employee morale.

Easy Integration with Enterprise Territory Management

Automate the process for creating models, territories, and assignment rules when you publish them from Salesforce Maps Territory Planning to Enterprise Territory Management. Or import models and users from Enterprise Territory Management.

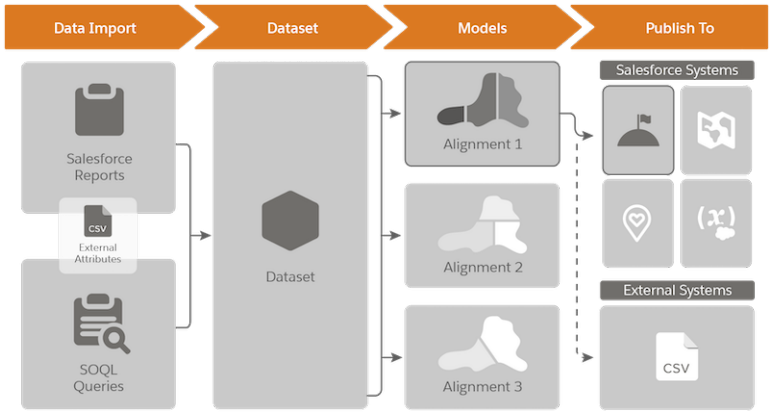
What's Salesforce Maps Territory Planning?

Territory Planning helps you design optimal territories for sales and service teams. Compare scenarios that help you close gaps in sales and service coverage, distribute the workload fairly, and maintain balanced territories. You choose the best scenario to establish your territory model.

Territory Planning helps sales and service operations manage and rebalance territories. Specifically, it helps teams:

- Align territories with account, user, and critical business data.
- Distribute sales opportunities and service requests in an equitable way.
- Swiftly optimize territories to meet demands of the changing times and their effects on staffing levels.

Review what happens when you import Salesforce data into Territory Planning.



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Stage	What's Happening Here
Data Import	You import data, such as accounts, leads, opportunities, and cases using Salesforce reports and queries. Supplement the data that you import with attributes from external sources in a CSV file.
Dataset	Territory Planning stores the Salesforce data that you import in datasets. Think of them as snapshots of your Salesforce data. Each dataset stores as many as 250,000 records.
Models	From your datasets, you create territory models, which we call *alignments*. Easily compare alignments, and then optimize them. If you want, further supplement your alignments with attributes from external sources in a CSV file.
Publish To	You choose where to publish your alignments. **Salesforce Systems** • Automate processes that create models, territories, and assignment rules in Enterprise Territory Management. • Plot shape layers based on the territories that you design for Salesforce Maps. • Create and update map-based service territories in the form of polygons in Field Service. • Update specific Salesforce fields with optimized territory data. **External Systems** Pack your alignment data in CSV files for importing into other systems that your business relies on.

How Territory Planning Helps Drive Sales and Service

Create an equitable division of sales opportunities and service requests among your reps using Salesforce Maps Territory Planning. Optimized territories deliver improved sales and service, reduced operating costs, and higher employee morale.

Everyone in your company wins when you implement systems to improve sales and service productivity and efficiency. Those improvements help especially in terms of preserving and growing your workforce.

How Territory Planning Helps	What Sales and Service Operations Can Accomplish
Develop territories that give your company a competitive advantage.	Roll out sales and service strategies faster. Territory Planning features make it easy to: • See your plans in a map view as you adjust for territories, accounts, revenue, and quotas, for example. • Gather comments on territory plans from sales and service leadership. • Share territories with reps in PDF files. • Integrate with Salesforce using Enterprise Territory Management.
Respond to revised business goals.	Determine the best coverage for your company's territories using scenarios, which helps operations consider and adjust for factors, such as: • Staffing changes • Drive time

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How Territory Planning Helps	What Sales and Service Operations Can Accomplish
	• Updated performance goals • Geographical considerations Your teams easily update territory models based on the scenarios that give your company optimal coverage—without importing from or exporting to external systems.
Optimize territories based on your business priorities.	Adjust territories so that sales and service records are accessible and logical based on actual travel time between locations. Using attributes that matter most to your company, select an optimization preference that factors in balance, continuity, and compactness.

Easy Integration with Enterprise Territory Management

Automate the process for creating models, territories, and assignment rules when you publish them from Salesforce Maps Territory Planning to Enterprise Territory Management. Or import models and users from Enterprise Territory Management.

Territory Planning makes it easy to visualize and optimize essential model content that you publish to Enterprise Territory Management.

When you...	Territory Planning...
Publish to Enterprise Territory Management	Creates the Enterprise Territory Management: • Territory model • Territories • Assignment rules • Assignments of primary territory users After you publish a territory design to Enterprise Territory Management, sales leadership can easily manage and communicate territory configurations with stakeholders and field reps. Specifically, sales operations can quickly create and share reports and dashboards that visualize territory success.
Import from Enterprise Territory Management	Lets you create territory models—or alignments—based on the model and its assigned users from Enterprise Territory Management.

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Key Concepts for Territory Planning

Read about relevant concepts before you take steps to implement Salesforce Maps Territory Planning.

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Dataset Concepts
Create territory models using Salesforce data that you import into Salesforce Maps Territory Planning.

Territory Boundary Concepts
Define a type of territory boundary for each country in the datasets that you create in Salesforce Maps Territory Planning.

Alignment Concepts
Model your territories in alignments that you create from your datasets in Salesforce Maps Territory Planning. You then choose where to publish your alignments within Salesforce. You also get the choice to map alignment data to specific Salesforce fields or export the data to use in proprietary and third-party systems.

Sharing and Permission Concepts
Apply the principle of least privilege when you restrict access to datasets and alignments among teammates in Salesforce Maps Territory Planning.

Dataset Concepts

Create territory models using Salesforce data that you import into Salesforce Maps Territory Planning.

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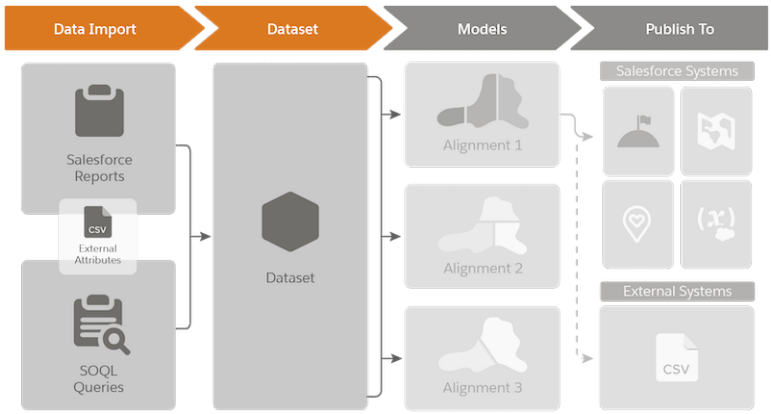
Territory Planning stores data that you import from Salesforce in datasets. Depending on your business processes, refresh data sources periodically so that Territory Planning includes current, relevant Salesforce data.



We see how importing data using Salesforce reports, SOQL queries, or a combination of the two creates your dataset. Supplement the data with external attributes when you import data, or work with your alignments.

Methods for Importing Data

You choose a method for creating your datasets using Salesforce reports, SOQL queries, or a combination of the two. Supplement that data with attributes from external sources in CSV files.

If you import...	Select any combo of...	Here's Why
As many as 250,000 records	Salesforce reports and SOQL queries	Reports can include as many as 250,000 records. It's fine for you to select multiple reports when you create datasets as long as they collectively contain no more than the 250,000 record allocation for each dataset.
More than 250,000 records	Salesforce reports and SOQL queries, *and* the option to aggregate records	If you plan to import high volumes of data, it's best to turn on the Bulk API setting and select SOQL queries as your data sources. That way you speed up the import process and reduce the likelihood of you encountering Salesforce governor limits. In addition, if you aggregate records within territory boundaries, you: • Include more records in your datasets that would otherwise exceed the 250,000 record allocation. • Get a simplified view of the units as a single unit within each boundary on the map. When you aggregate records, keep in mind that: • Units within a boundary appear as a single aggregated unit. • Assignments for aggregated units adopt the assignment value from one of the units within that boundary. • Numeric values for aggregated units represent the sum of all units within them.

Attributes from External Sources

When you create datasets, you can add supplemental, external data in CSV files. Your supplemental data can include attributes that:

- Get your territory models further dialed-in by appending fields that include relevant data stored outside Salesforce.
- You want to adjust and include as model data that you later export to proprietary and third-party systems.

Fields to Include for Importing the Right Data

Include these essential fields in the datasets that you create.

Field or Field Type	It's good to know that...
Record Id	Territory Planning requires 15-character record IDs for every record you import.
Latitude	Territory Planning requires latitude and longitude data and skips importing records without it.
Longitude	
Assignment	Typically, assignments come in the form of a territory name, username, or user ID. If your company includes large teams—with some teammates who share first and last names—user IDs eliminate any potential for confusion.
Descriptive fields	Descriptive fields help with searching, filtering, and exporting. For example, add fields such as Account Name, City, State, Market Segment, and External Id.
Numeric fields	Numeric fields help with aggregating data at the territory level or optimizing alignments. For example, add fields such as Annual Revenue, Employees, and Potential.

SEE ALSO:

Refresh Data Sources for Continual Territory Optimization

Territory Boundary Concepts

Define a type of territory boundary for each country in the datasets that you create in Salesforce Maps Territory Planning.

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Types of Boundaries

Your datasets can include multiple countries, each with a type of boundary that you specify. For example, you create a dataset that includes these countries and types of boundaries.

Country	Boundary Type
United States	Postal code
Mexico	Municipality
Canada	Forward sortation area

When each unit includes accurate geocodes, Territory Planning determines boundary assignments for you. Later, you can adjust assignments so that each unit belongs to the territory that best aligns with your goals.

Why Boundaries Matter

To help you manage the territories in your territory model, boundaries:

- Serve as a method of aggregation for territories and the units within them

- Give you a way to move all units within them to other territories easily
- Help you identify geographical footprints within your territories and assign units to them

The Importance of Accurate Geocodes

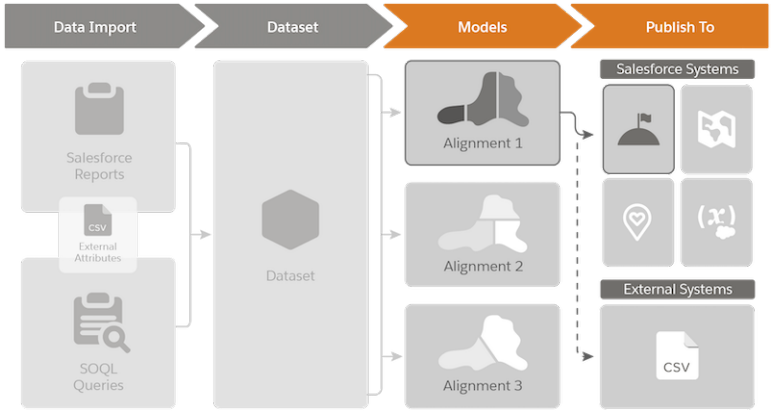
When you create datasets, you select latitude and longitude fields that determine which boundaries Territory Planning assigns units to. Keep these points in mind.

For units with...	Territory Planning...
Geographical locations over water	Doesn't assign them to boundaries. For those units, you either: • Assign them to specific territories of your choice. • Apply logic that determines territory assignments for you. For example, you select logic that assigns the units to territories whose centers are closest to them.
Bad or outdated geocodes	Assigns them to potentially wrong boundaries.
US point ZIP codes	Handles assignments depending on the type of US postal code boundary that you select. If the boundary type that you select includes: • Postal codes only, Territory Planning assigns the units to the boundaries that they occupy. • Postal codes with point ZIP codes, Territory Planning assigns the units to their point ZIP codes.

Alignment Concepts

Model your territories in alignments that you create from your datasets in Salesforce Maps Territory Planning. You then choose where to publish your alignments within Salesforce. You also get the choice to map alignment data to specific Salesforce fields or export the data to use in proprietary and third-party systems.

Territory Planning stores models in alignments, which are visual representations of your sales and service teams' territory hierarchies. Alignments serve different purposes, depending on the system to which you publish them.



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We see how the data that you import plays a key role in the alignments that you publish.

What Happens When You Publish Alignments

Sales and service operations publish alignments to any of these destinations, depending on your teams' objectives and systems already in place.

Destination	The alignments publish as...	Publishing alignments updates assignments for...
Enterprise Territory Management	Territory models, which create Salesforce: • Models • Territories • Assignment rules	• Accounts • Opportunities • Users
Salesforce Maps	Shape layers, which reps plot on the map to help them: • Plan and work their schedules. • Take advantage of route optimization.	As many as 5,000 auto assignment rules for any records that include geocoding, such as: • Accounts • Opportunities • Users • Leads • Cases
Field Service	Service territories and polygons.	• Accounts • Users • Cases

Alignment Approval Processes

Alignments affect entire teams and their assignments, so it's important to avoid accidental changes to or loss of alignment details. To preserve the integrity of alignments, you grant authority to specific teammates who can then publish new and updated alignments. When you grant that authority, you:

- Require that others request approval for changes to alignments before authorized teammates publish them.
- Let others add comments to alignments pending approval.
- Prevent others from making further changes to alignments pending approval.
- Give authorized teammates advance notice when others try to publish alignments. You also let authorized teammates provide feedback about, approve, and deny publish requests.

Sharing and Permission Concepts

Apply the principle of least privilege when you restrict access to datasets and alignments among teammates in Salesforce Maps Territory Planning.

To share and control who can view and modify datasets and alignments, their creators can:

- Invite others to gather feedback before publishing.
- Hide datasets and alignments altogether.
- Restrict others' access. The access that creators apply to datasets also applies to their alignments.
- Transfer ownership. Keep in mind that the new owners can restrict the creators' access.

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1. Designate an OAuth User for Data Processing and Optimizations
   Assign yourself or a colleague as the OAuth user. Salesforce Maps Territory Planning processes data management and alignment optimizations through the OAuth user on Salesforce Maps servers. That way, nobody's affected during intensive system processing.
2. Set Up Collaboration Among Teammates
   Encourage collaboration in territory plans and alignments by enabling feed tracking for Salesforce Maps. And let teammates interact directly on a map in Salesforce Maps Territory Planning.
3. Add and Create Roles for Users Assigned to Salesforce Territories
   Let your sales and service teams assign specific territory team roles from Salesforce to areas in Salesforce Maps Territory Planning. Each role that you create maps to a territory team role. After you create alignments and publish them to Enterprise Territory Management, assigned users and their roles appear in Salesforce territory models.
4. Configure Options for Publishing Alignments
   Select the alignment publishing destinations that you want to appear in Salesforce Maps Territory Planning. Specify who can publish alignments to those destinations and whether to require approval for publishing alignments.
5. Setting Up Approvals for Alignments and Publishing
   Determine how your teams approve changes to alignments using an approval method that meets your company's requirements in Salesforce Maps Territory Planning. And designate who can publish approved alignments.

SEE ALSO:

Installing and Giving Access to Salesforce Maps

Designate an OAuth User for Data Processing and Optimizations

Assign yourself or a colleague as the OAuth user. Salesforce Maps Territory Planning processes data management and alignment optimizations through the OAuth user on Salesforce Maps servers. That way, nobody's affected during intensive system processing.

Regardless of who creates and manages datasets and alignments, Territory Planning processes that work through the OAuth user. That user requires access to Territory Planning and any Salesforce objects involved in the data import process, such as the Account and Opportunity objects.

1. To designate yourself as the OAuth user, log in to Salesforce with your username and password. Or to designate a colleague, ask that colleague to log in to Salesforce with their username and password.

   The person you designate as the OAuth user completes the rest of this procedure.

2. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
3. Click **Configure** next to the Salesforce Maps package.
4. Select **OAuth**. Then, click **Authorize**.

5. Click **Allow Access**.

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USER PERMISSIONS

To customize settings:
- Customize Application

Set Up Collaboration Among Teammates

Encourage collaboration in territory plans and alignments by enabling feed tracking for Salesforce Maps. And let teammates interact directly on a map in Salesforce Maps Territory Planning.

If you set up Salesforce Maps in Summer '20 or later, skip this procedure altogether because feed tracking comes enabled.

1. Confirm you have Chatter enabled.
2. From Setup, in the Quick Find box, enter `Feed Tracking`, and then select **Feed Tracking**.
3. Enable feed tracking for:
   - **Territory Planning Alignment**
   - **Territory Planning Dataset**

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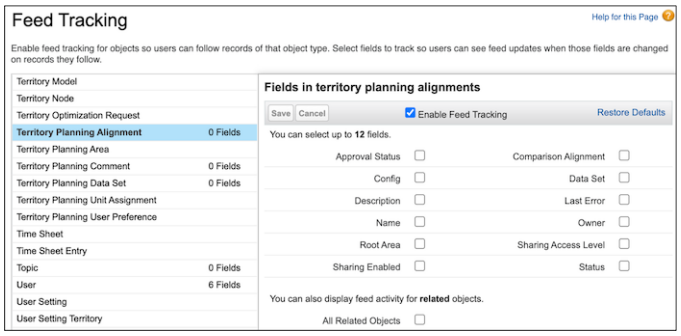

Add and Create Roles for Users Assigned to Salesforce Territories

Let your sales and service teams assign specific territory team roles from Salesforce to areas in Salesforce Maps Territory Planning. Each role that you create maps to a territory team role. After you create alignments and publish them to Enterprise Territory Management, assigned users and their roles appear in Salesforce territory models.

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Under Territory Planning, click **Area Roles**.
4. Assign a territory team role to the default area owner or to a new area role.

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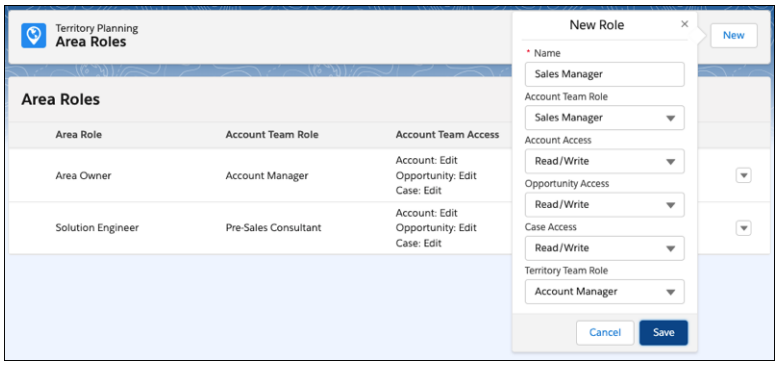

To assign a territory team role to...	Do this...
The default area owner	On the Area Owner role, click **Edit**, and then select its corresponding territory team role from Enterprise Territory Management. Keep in mind that you can change the territory team role assignment, but you can't delete the default area owner role.
A new area role	Click **New**, and then select its corresponding territory team role from Enterprise Territory Management.

5. Set access levels for the roles that you want available for territory assignments. Create any other roles that apply to your territories.
6. Save your work.

Configure Options for Publishing Alignments

Select the alignment publishing destinations that you want to appear in Salesforce Maps Territory Planning. Specify who can publish alignments to those destinations and whether to require approval for publishing alignments.

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Under Territory Planning, click **Publish Options**.
4. Enable the publishing options that you want to appear in Territory Planning. Then for each option that you enable, select the access level and whether to require approval for publishing alignments.

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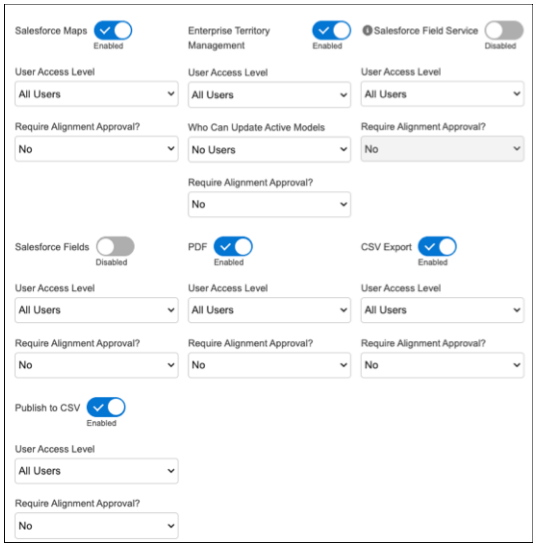

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Determine how your teams approve changes to alignments using an approval method that meets your company's requirements in Salesforce Maps Territory Planning. And designate who can publish approved alignments.

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Defining Records and Fields for Your Datasets

Identify the data that you want to include in your datasets, such as location and account ownership details. Next, you create custom report types, add fields that include the data, and set values for any default fields you want. You then create datasets in Salesforce Maps Territory Planning from reports that you run using your custom report types.

Create Custom Report Types That Integrate with Enterprise Territory Management

Gather account and territory data in custom report types for integrating Salesforce Maps Territory Planning with Enterprise Territory Management. With that data, you create datasets from Salesforce reports that you run using your custom report types. Sales and service operations can then optimize territories and publish updated models to Enterprise Territory Management.

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Create Custom Report Types That Include Account Ownership or Address Details

Pull together account ownership and location details in custom report types. You later create datasets in Salesforce Maps Territory Planning from reports that you run using those custom report types. Sales and service operations can then optimize territory models. Those models are then available to publish to Salesforce Maps as shape layers or export in CSV format for other territory management systems.

Run Reports from Your Custom Report Types

Create reports that include data from the objects and their fields that you added to your custom report types. When you later import your data, you assemble your datasets using those reports and the data in them.

Create Custom Report Types That Integrate with Enterprise Territory Management

Gather account and territory data in custom report types for integrating Salesforce Maps Territory Planning with Enterprise Territory Management. With that data, you create datasets from Salesforce reports that you run using your custom report types. Sales and service operations can then optimize territories and publish updated models to Enterprise Territory Management.

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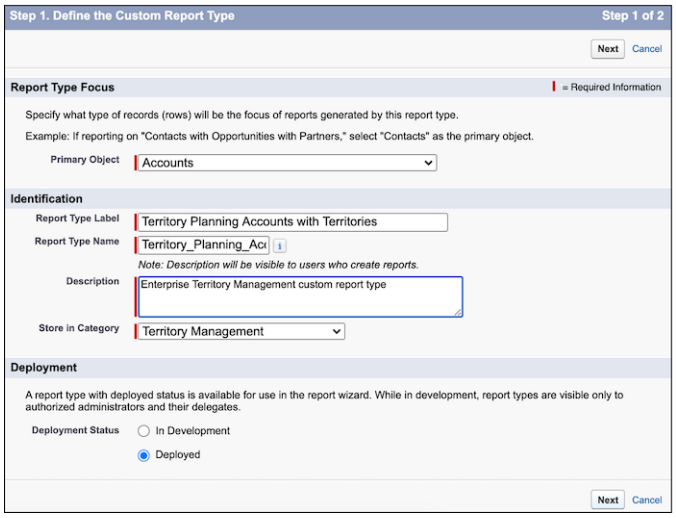
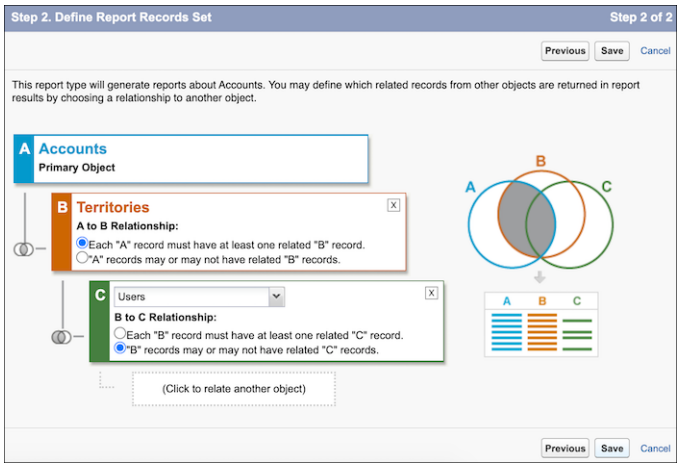
To create custom report types:

- Create and Customize Reports AND Manage Custom Report Types

1. From Setup, in the Quick Find box, enter `Report Types`, and then select **Report Types**.
2. Click **New Custom Report Type**.



3. Select **Accounts** as the primary object for your custom report type.
4. Enter a report type label, a unique report type name, and a description. Then select where to store your report type.
5. Select **Deployed**, and then click **Next**.



6. To relate accounts to territories and users, select **Territories** as a child object.
   - If your accounts are already assigned to territories, select **Each "A" record must have at least one related "B" record**.
   - If your accounts aren't assigned to territories, select **"A" records may or may not have related "B" records**.
7. If you want, select **Users** as a child object.
8. If you want to include accounts that are assigned to territories without users, select **"B" records may or may not have related "C" records**.
9. Save your changes.

Create Custom Report Types That Include Account Ownership or Address Details

Pull together account ownership and location details in custom report types. You later create datasets in Salesforce Maps Territory Planning from reports that you run using those custom report types. Sales and service operations can then optimize territory models. Those models are then available to publish to Salesforce Maps as shape layers or export in CSV format for other territory management systems.

1. From Setup, in the Quick Find box, enter `Report Types`, and then select **Report Types**.
2. Click **New Custom Report Type**.

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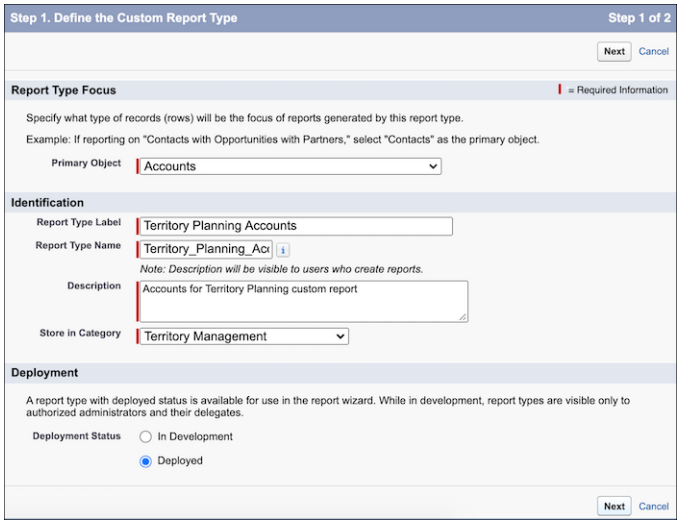
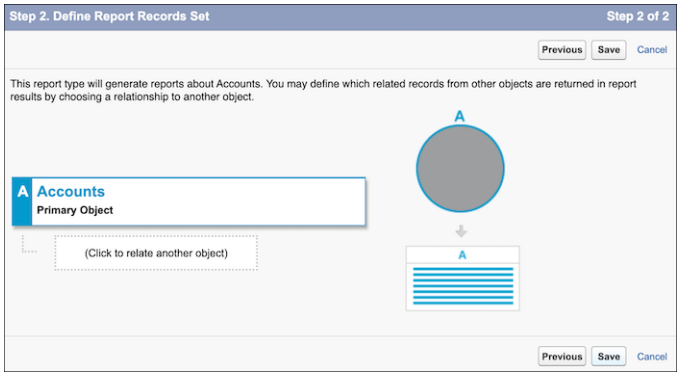


3. Select the primary object for your custom report type.
4. Enter a label, name, and select where to store your report type.
5. Select **Deployed**, and then click **Next**.

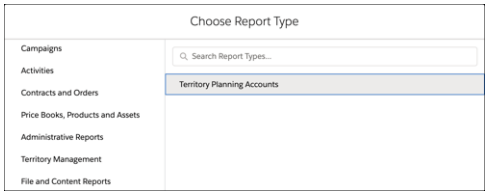


6. Save your work.

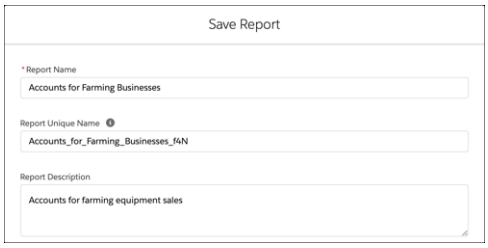
Run Reports from Your Custom Report Types

Create reports that include data from the objects and their fields that you added to your custom report types. When you later import your data, you assemble your datasets using those reports and the data in them.

1. In Territory Planning, click **Reports** > **New Report**.
2. Select the report type that you created for the data you plan to import.



3. Select any columns that you want to include, then click **Save & Run**. Give the report a name, then save your changes.



The report appears as a data source when you're ready to create your datasets.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To run reports:
- Run Reports

Creating Datasets

Import Salesforce data into Salesforce Maps Territory Planning from reports that you run using your custom report types and SOQL queries that you write.

Create Datasets from Reports

Import Salesforce data into Salesforce Maps Territory Planning from reports using your custom report types.

Create Datasets from SOQL Queries

Import Salesforce records into datasets using SOQL queries that you write in Salesforce Maps Territory Planning.

Create Datasets That Include High Account Volumes

Import high volumes of accounts while staying within the dataset allocation of 250,000 records. Aggregate records as a single unit within each territory boundary in Salesforce Maps Territory Planning.

EDITIONS

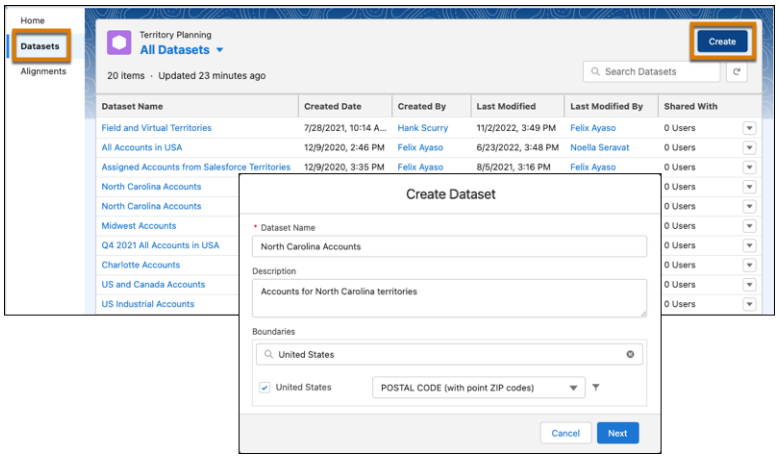
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

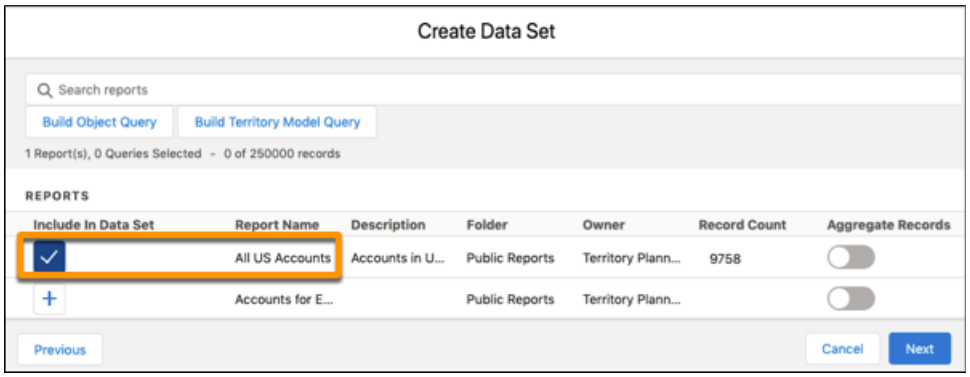
Create Datasets from Reports

Import Salesforce data into Salesforce Maps Territory Planning from reports using your custom report types.

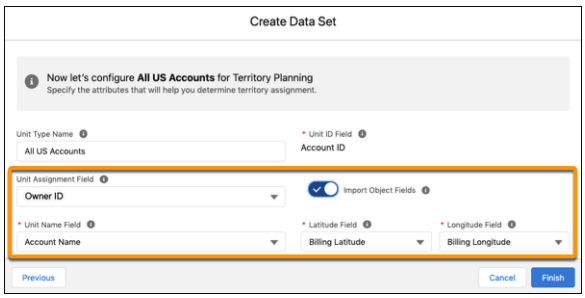
1. Click **Datasets**, then click **Create**. Enter a name for the dataset and click **Next**.



2. Select the reports that you want to include. If the reports collectively include more than the 250,000 record allocation for each dataset, aggregate records for any selected reports. Then click **Next**.



3. If you don't see the options you need for unit assignment, unit name, latitude, or longitude, turn on **Import Object Fields**. Confirm or select the field options that you want. For example, select **Owner ID** for the unit assignment field, and **Account Name** for the unit name field.



EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

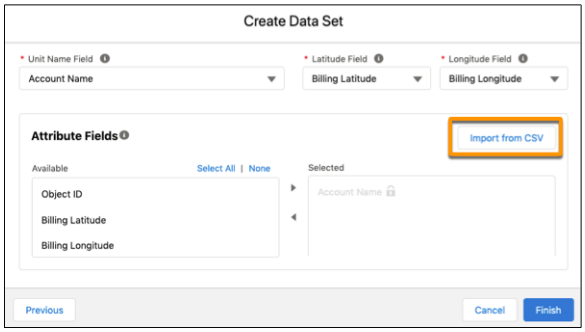
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:

- Customize Application

4. To supplement your data with attributes from external sources in CSV files, click **Import from CSV**, then add the CSV files that you want.



5. Click **Finish**.

Create Datasets from SOQL Queries

Import Salesforce records into datasets using SOQL queries that you write in Salesforce Maps Territory Planning.

1. If you plan to import high volumes of data into your datasets, it's best to turn on Bulk API. That way you reduce the likelihood of encountering Salesforce governor limits and speed up the loading process for alignments. Otherwise, skip to Step 2.

   From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**. Next to the Salesforce Maps package, click **Configure**. Under Territory Planning, select **Data Management**, and then select **Bulk API**.

   Even with Bulk API turned on, Territory Planning validates SOQL queries using Apex.

2. In Territory Planning, click **Datasets**, then click **Create**. Enter a name for the dataset and click **Next**.

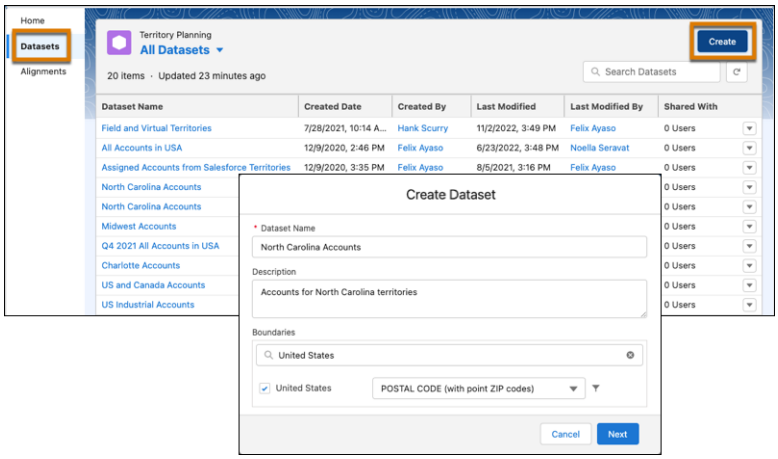
EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

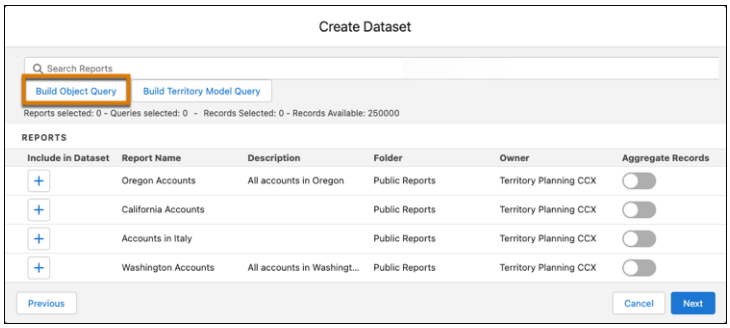
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:
- Customize Application



3. Click **Build Object Query**.

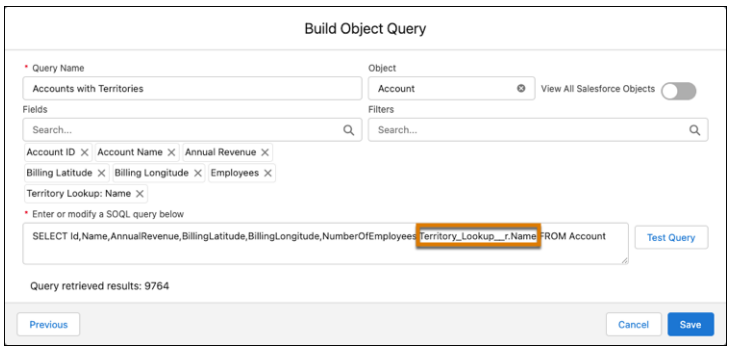


4. Give your query a name, then select an object.
5. Select the fields and filters that you want to add or modify. The fields and filters that you select appear in the SOQL query field.

   You can adjust the query directly. For example, use dot notation to pull fields from objects that the base object looks up to.

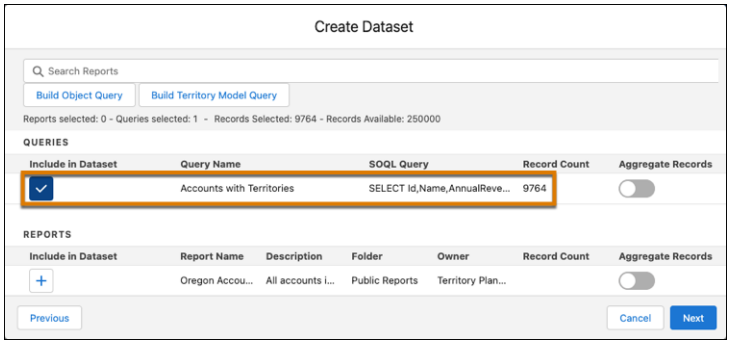
   ```
   SELECT ID, NAME, ANNUALREVENUE, BILLINGLATITUDE, BILLINGLONGITUDE, OWNER.NAME FROM ACCOUNT
   ```

   To join data from one object to another, specify custom relationships. For example, you plan territories for accounts and you want to relate custom territory information, such as territory IDs and names, to them.

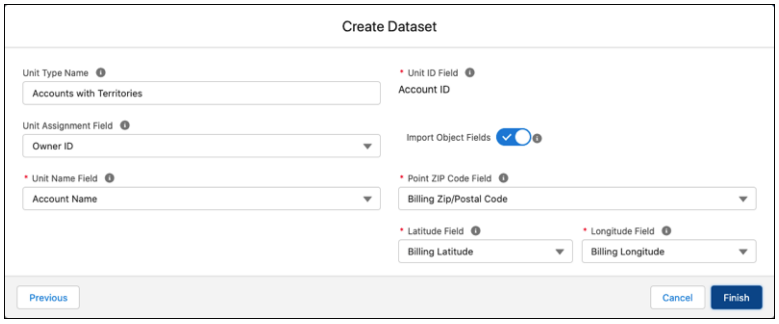


6. Test your query, then save your work.

7. Include the query that you created. Click **Next**.



8. Select a unit assignment field such as Owner ID. For more field options, turn on **Import Object Fields**.



9. Click **Finish**.

Create Datasets That Include High Account Volumes

Import high volumes of accounts while staying within the dataset allocation of 250,000 records. Aggregate records as a single unit within each territory boundary in Salesforce Maps Territory Planning.

1. If you plan to use SOQL queries as data sources for your datasets, it's best to enable Bulk API, which speeds the import process and reduces the likelihood of you encountering Salesforce governor limits. Otherwise, skip to Step 2.

   From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**. Next to the Salesforce Maps package, click **Configure**. Under Territory Planning, select **Data Management**, and then select **Bulk API**.

2. In Territory Planning, click **Datasets**, then click **Create**. Enter a name for the dataset.

EDITIONS

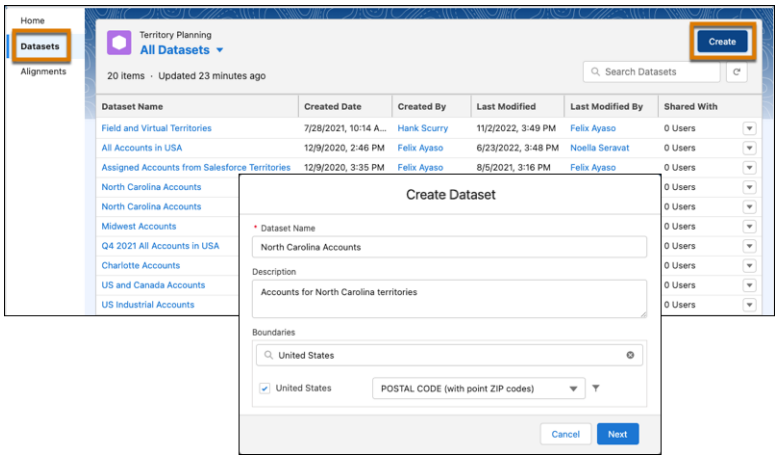
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

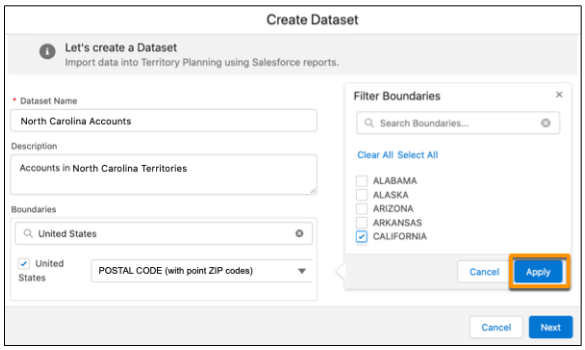
USER PERMISSIONS

To customize settings:

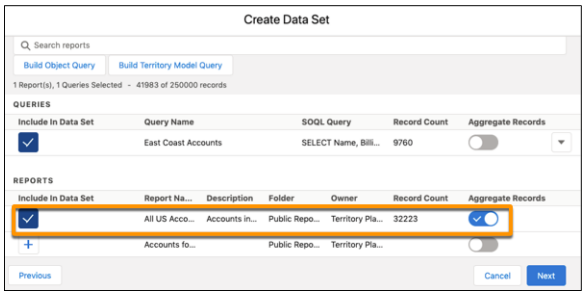
- Customize Application



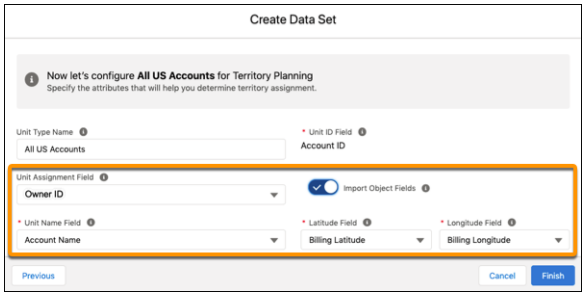
3. Select territory boundaries and filter them as needed, then click **Apply** > **Next**.



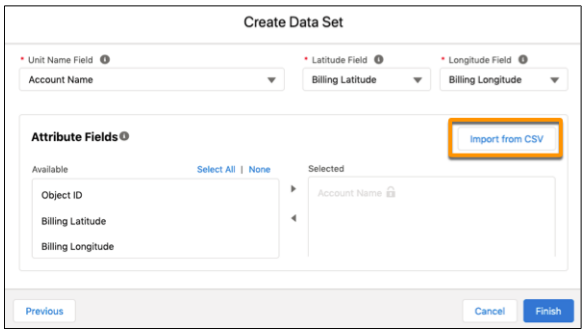
4. Include any combination of reports and SOQL queries as your sources. If you expect to exceed the 250,000 record allocation for your dataset, select **Aggregate Records** for any of your sources. While aggregating records reduces granularity for some records, it helps you stay within the dataset's 250,000 record allocation.



5. Click **Next**.
6. If you don't see the options you need for unit assignment, latitude, or longitude, turn on **Import Object Fields**, then select a unit assignment field such as Owner ID.



7. To supplement your data with attributes from external sources in CSV files, click **Import from CSV**, then add the CSV files that you want.



8. Click **Finish**.

SEE ALSO:

Create Datasets from Reports

Create Datasets from SOQL Queries

Creating and Publishing Alignments

Model territories in alignments that you create using your datasets in Salesforce Maps Territory Planning. Then publish your alignments to Enterprise Territory Management, Salesforce Maps, or Field Service. Update the Salesforce fields of your choice with revised territory data and gather feedback on alignments from leadership.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

1. Creating Alignments

   Design visual representations of your territory hierarchies in Salesforce Maps Territory Planning. Alignments include details about unit and territory assignments within your sales and service teams. Later, sales and service operations can refine and optimize alignments using scenario planning features.

2. Publishing Alignments

   Put your territory alignments into action when you publish them to Enterprise Territory Management, Salesforce Maps, or Field Service. Update specific fields in Salesforce with revised territory data and encourage feedback on alignments among sales and service leadership in PDF files.

Creating Alignments

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EDITIONS

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Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

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EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

Publish Alignments to Enterprise Territory Management

Update Salesforce territory models and their assignment rules when you publish the alignments that you create in Salesforce Maps Territory Planning to Enterprise Territory Management.

Publish Alignments to Salesforce Maps

Create shape layers that include territory model details from the alignments you create in Salesforce Maps Territory Planning.

Publish Alignments to Field Service

Design and update map-based service territories for Field Service using Salesforce Maps Territory Planning. Service operations publish those territories in the form of alignments as service territory polygons.

Publish Territory Updates to Specific Fields in Salesforce

Populate Salesforce fields with updated territory data from Salesforce Maps Territory Planning. Most commonly, you update Salesforce fields that correspond with the records you import for your datasets.

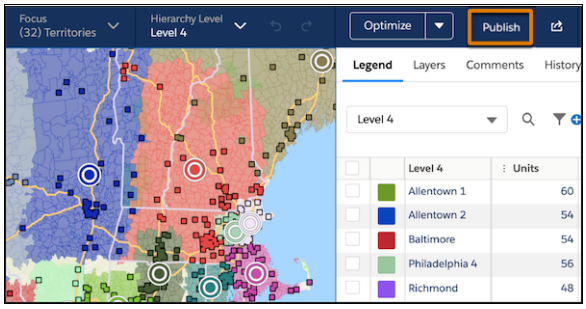
Share Alignments in PDF Files

Encourage feedback on alignments from sales and service leadership. Sharing alignments in PDF files gives stakeholders opportunities to provide guidance for fine-tuning your territory models.

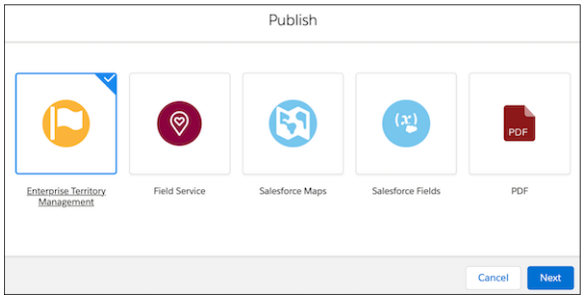
Publish Alignments to Enterprise Territory Management

Update Salesforce territory models and their assignment rules when you publish the alignments that you create in Salesforce Maps Territory Planning to Enterprise Territory Management.

1. From the map, click **Publish**.



2. Select **Enterprise Territory Management**, and click **Next**.



3. Select the scope of what to publish.

EDITIONS

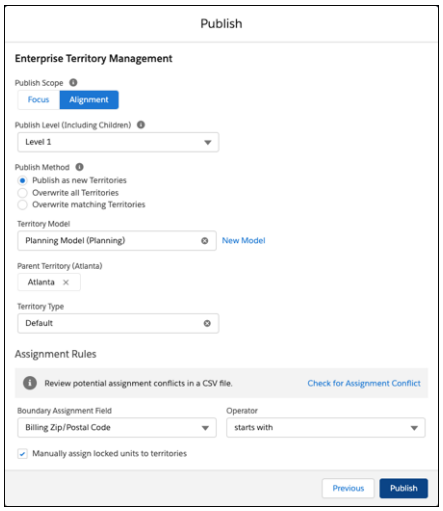
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:

- Customize Application



To Publish...	Select...
The entire alignment when you create hierarchies for the first time or transition to a new planning model	**Alignment**
Your current focus when you change one area and want to publish those changes	**Focus**

4. Select the level to publish. Children of the selected level are published along with the level. For example, your hierarchy is **Region** > **District** > **Territory**. When you publish a district, you also publish its territories.
5. Select the method, territory model, and territory type you want to publish.
6. Select the assignment rule field and operator that match the territory boundary of the alignment. The most common combination for the US is Billing Zip and "starts with".
7. To manually publish accounts that don't match geographic assignment rules, select **Manually assign locked units to territories**. For example, another rep owns an account in the assignment rule ZIP code. So you manually assign that account to a territory.
8. Click **Publish**.

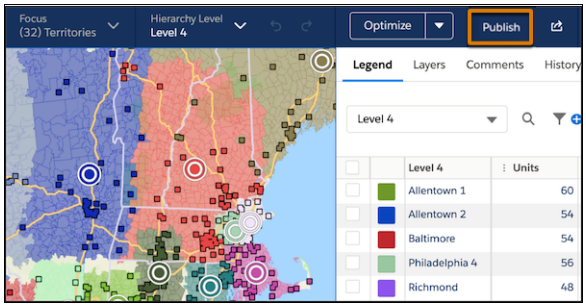
   If a territory exceeds assignment rule limits, Territory Planning prompts you to select an option for handling the assignment rules.

If you want to...	Select...
Not publish assignment rules for this territory	**Skip Assignment Rules**
Publish the minimum required values by editing assignment rules	**Simplify Rules**
Divide the territory into as many child territories as necessary to capture its assignment rules and publish the child territories with the original names and users	**Publish as Child Territories**

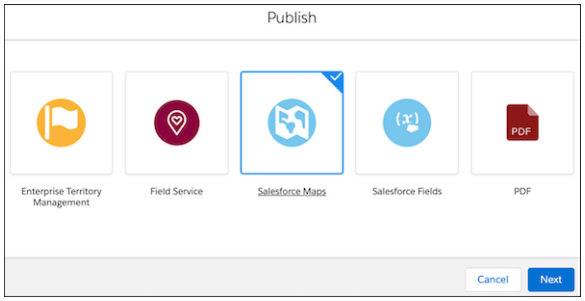
Publish Alignments to Salesforce Maps

Create shape layers that include territory model details from the alignments you create in Salesforce Maps Territory Planning.

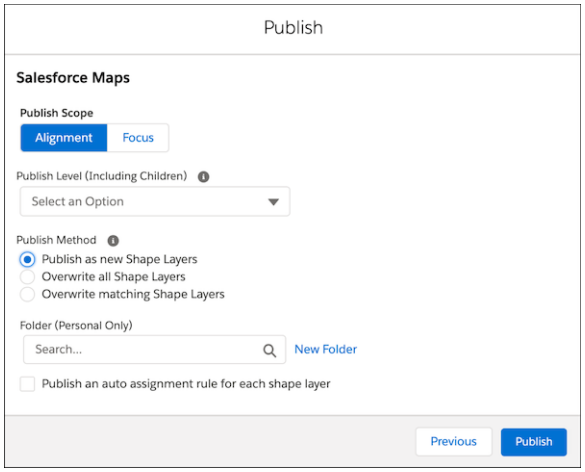
1. From the map, click **Publish**.



2. Select **Salesforce Maps**, and click **Next**.



3. Select the scope of what to publish.



EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:

- Customize Application

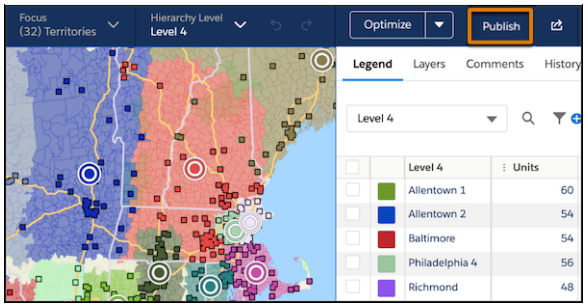
For Example, to Publish...	Select...
The entire alignment when you create hierarchies for the first time or transition to a new planning model	**Alignment**
Your current focus when you change one area and want to publish those changes	**Focus**

4. Select the level to publish. Children of the selected level are published along with the level. For example, your hierarchy is **Region** > **District** > **Territory**. When you publish a district, you also publish its territories.
5. Select the method you want to use to publish.
6. Select the folder where you want to publish the alignment as a shape layer. Each territory is created as it's own shape in Salesforce Maps.
7. To create an auto assignment rule for every territory in your publish scope, select **Publish an auto assignment rule for each shape layer**.
8. Click **Publish**.

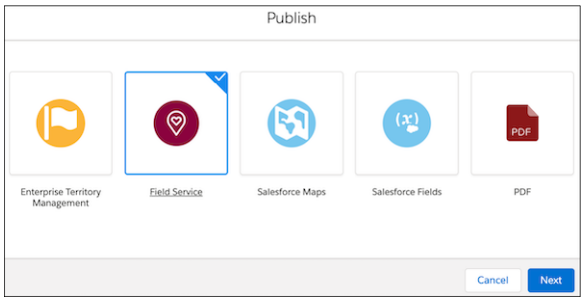
Publish Alignments to Field Service

Design and update map-based service territories for Field Service using Salesforce Maps Territory Planning. Service operations publish those territories in the form of alignments as service territory polygons.

1. From the map, click **Publish**.



2. Select **Field Service**, and click **Next**.



3. Select the scope of what to publish.

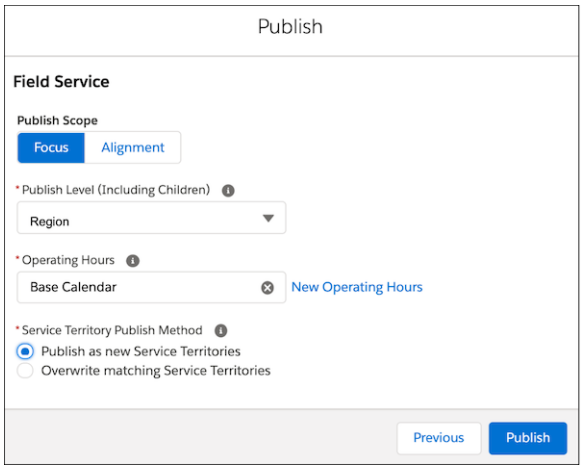
EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:
- Customize Application



For Example, to Publish...	Select...
An entire alignment when you roll out a new plan	**Alignment**
Your current focus when you change one area and want to publish those changes	**Focus**

4. Select the level to publish. Children of the selected level are published along with the level. For example, your hierarchy is **Region** > **District** > **Territory**. When you publish a district, you also publish its territories.
5. Select which operating hours from Field Service to use for the new territories. Or add new operating hours.
6. Select whether to publish as new service territories or overwrite matching service territories.
7. Click **Publish**.

Publish Territory Updates to Specific Fields in Salesforce

Populate Salesforce fields with updated territory data from Salesforce Maps Territory Planning. Most commonly, you update Salesforce fields that correspond with the records you import for your datasets.

For example, you create a dataset that includes Salesforce accounts. You then optimize focuses in Territory Planning, which updates account owners for many of your accounts. So you publish those updates to your account records in Salesforce.

1. From the map, click **Publish**.

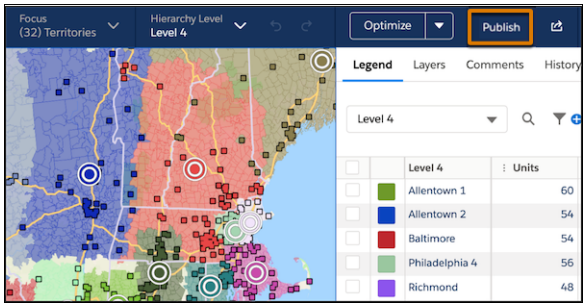
EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

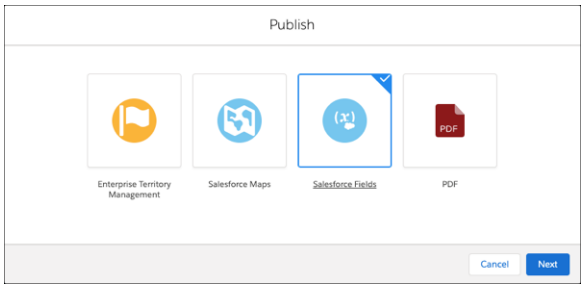
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:
- Customize Application

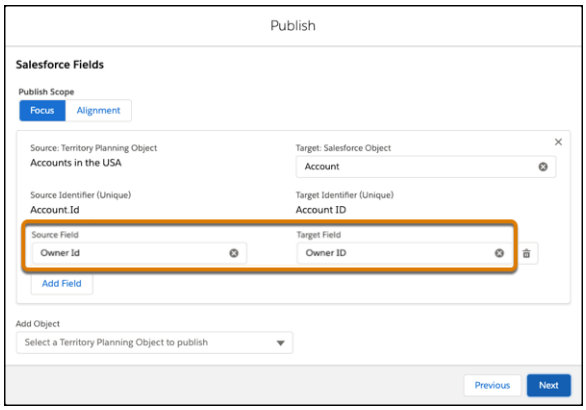


2. Select **Salesforce Fields**, and click **Next**.



3. Set the publish scope to **Focus**. Under Add Object, select the unit that you want to publish, such as **Accounts in the USA**.
4. Select the target Salesforce object, such as **Account**.
5. Select the source field that you want to publish and its corresponding Salesforce field that you want to update.

   For example, you want the owner identifications for accounts in Salesforce to reflect the updated owner identifications in Territory Planning, so you select **Owner Id** for the source and target fields.

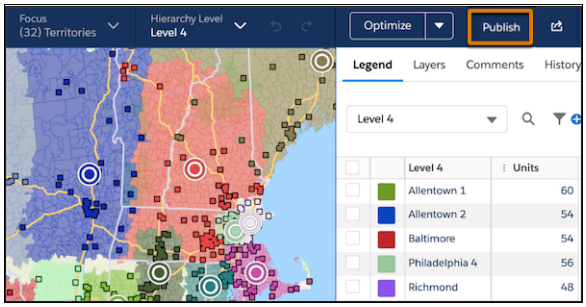


6. Click **Next**. Review your changes, then publish them. If any data fails to publish, download the log file, fix the errors, and publish again.

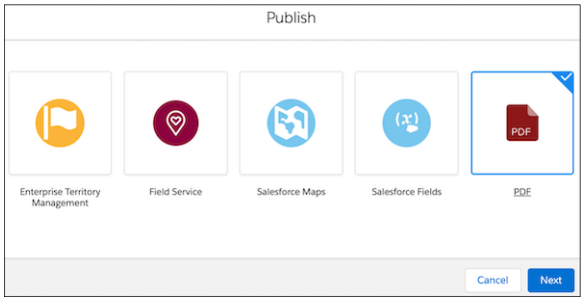
Share Alignments in PDF Files

Encourage feedback on alignments from sales and service leadership. Sharing alignments in PDF files gives stakeholders opportunities to provide guidance for fine-tuning your territory models.

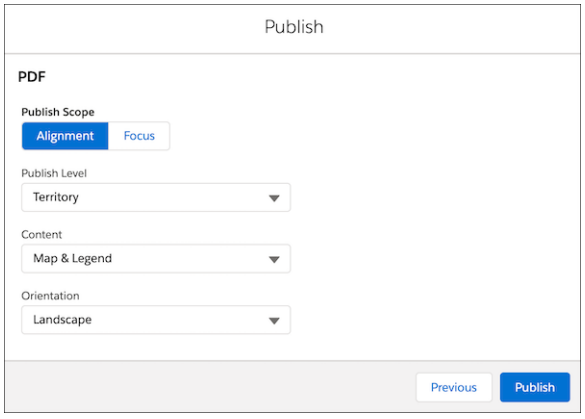
1. From the map, click **Publish**.



2. Select **PDF**, and click **Next**.



3. Select the scope of what to publish.



For Example, to Publish...	Select...
The entire alignment when you create hierarchies for the first time or transition to a new planning model	**Alignment**

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:
- Customize Application

For Example, to Publish...	Select...
Your current focus when you change one area and want to publish those changes	**Focus**

4. Select the level to publish. Children of the selected level are published along with the level. For example, your hierarchy is **Region** > **District** > **Territory**. When you publish a district, you also publish its territories.
5. Select the type of content to publish.

For Example, to Print...	Select...
The map on one page and the legend on another page in a single PDF file	**Map & Legend**
The map to a single PDF file	**Map**
The legend to a single PDF file	**Legend**
The maps and legend to a single PDF file for each area in a focus, determined by hierarchy level	**Individual Areas**

6. Click **Publish**.

Controlling Access to Datasets and Alignments

Keep managers focused on designing territories in the areas that leadership assigns to them in Salesforce Maps Territory Planning. Ensure privacy among your managers when you provide everyone access to only their respective areas. Share a dataset and all of its alignments with specific users and choose the level of involvement that you want them to have.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled