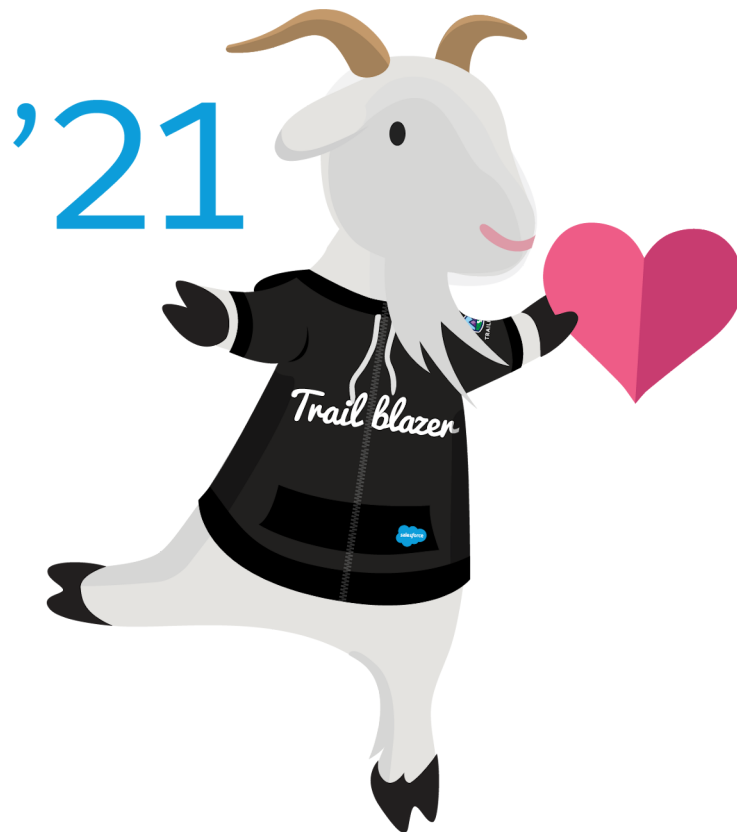

Enterprise Territory Management Implementation Guide

Salesforce, Summer '21



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LEARN ABOUT ENTERPRISE TERRITORY MANAGEMENT

Before you implement or use Enterprise Territory Management, take some time to learn about territory management basics.

IN THIS SECTION:

[Territory Type](#)

Territory types help you organize your territories by key characteristics important to your company. Every territory you create has a territory type. Territory types are used for organizing and creating territories only. They don't appear on territory model hierarchies.

[Territory](#)

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

[Territory Type Priority](#)

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. You create your own priority scheme. For example, *001* can indicate that a territory type is the highest priority or the lowest. Make sure that your scheme can scale as you add more territory types.

[Territory Model](#)

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

[Territory Hierarchy](#)

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

[Territory Model State](#)

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. You can have only one active territory model at a time, but you can create and maintain multiple models in planning or archived state to use for extra modeling or reference. Some states reflect a territory model's lifecycle and others indicate errors in processing when states are changed.

[How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?](#)

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

[How Does Filter-Based Opportunity Territory Assignment Work?](#)

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create has a territory type. Territory types are used for organizing and creating territories only. They don't appear on territory model hierarchies.

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

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

EDITIONS

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Territory

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

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

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Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. You create your own priority scheme. For example, *001* can indicate that a territory type is the highest priority or the lowest. Make sure that your scheme can scale as you add more territory types.

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



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

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Territory Model

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

Each territory model features a graphical hierarchy. The hierarchy shows your model's territory structure (including parent and child territories) and lets you create, edit, and delete territories and view their detail pages. Your Salesforce edition determines [the number of territory models](#) that you can create and modify at a time. Only one model can be active at any time. Activate the model you want to use to finalize its user and account assignments.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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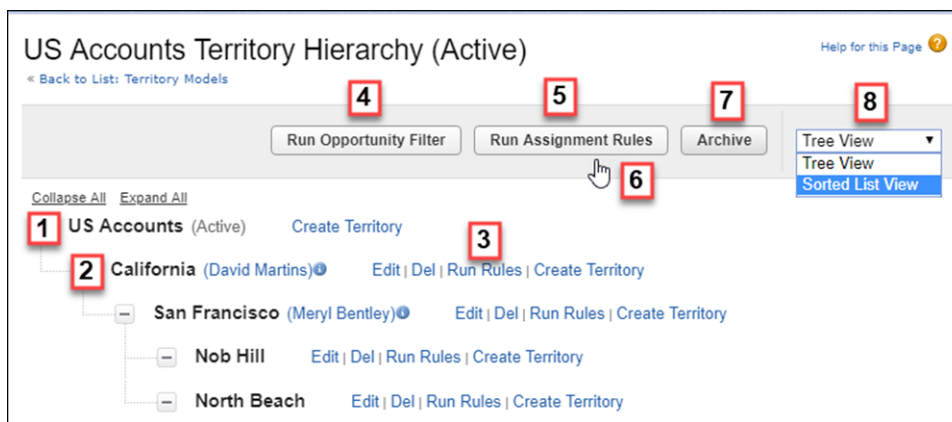
Territory Hierarchy

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

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The name and state of the territory model appear at the top node of the hierarchy (1). Parent and child territories are nested beneath the model name. If a territory has a forecast manager assigned, the manager's name appears here (2). Create or edit child territories, or run their assignment rules (3).

Run the filter that assigns territories to opportunities (4). Run assignment rules for all territories in the model (5). Hover to learn when rules were last run (6). Set the model's state to *Active* or *Archive* (7). Toggle to a sorted list view and back to tree view (8).

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. You can have only one active territory model at a time, but you can create and maintain multiple models in planning or archived state to use for extra modeling or reference. Some states reflect a territory model's lifecycle and others indicate errors in processing when states are changed.

The Manage Territories permission:

- Provides users access to territories in planning and archived state and to the list of accounts assigned to territories in planning and archived state.
- Does *not* provide access to the accounts assigned to territories in planning and archived state. Only the account name and ID fields appear in the list. To run territory planning reports, users must get access to accounts via a method other than the permission.

Lifecycle State	Definition
Planning	The default state for every new territory model you create. The <code>Planning</code> state lets you preview a model's territory hierarchy before deploying it.
Active	<p>The state of a territory model after you activate it and all processing is complete. Only <i>one</i> model in your Salesforce organization can be active at a time.</p> <p>A model in <code>Active</code> state lets users view model details, including hierarchies, territories, and all assigned accounts and users. Users assigned to territories within an active model can access and modify accounts they are assigned to within that model. And territory forecasts are based on your active territory model.</p>
Archived	<p>The state of a territory model after you archive it and all processing is complete. An archived model lets admins view hierarchy and rule assignments as they were configured when the model was active. Only the <i>active</i> model can be archived, and archived models cannot be reactivated.</p> <p>When you archive a territory model or delete a territory on an active model, the <code>Territory</code> field is reset to a blank value on opportunity records with those territories assigned.</p> <p>And when you archive a territory model, Salesforce deletes your territory forecasts, forecast types, quotas, and adjustments. Before</p>

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Lifecycle State**Definition**

you archive a territory model, consider running the opportunity territory assignment filter and then taking screenshots of the forecasts page. You can also create a [snapshot](#).

Error State**Definition**

Activation Failed

An error occurred during activation. Check your email for more information from Salesforce.

Archiving Failed

An error occurred during activation. Check your email for more information from Salesforce.

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

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

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

 **Note:** Enterprise Territory Management operations that require Manage Territories also require View Setup and Configuration for accessing Setup. View Setup and Configuration is not required for performing those operations via API.

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Users who:**Require these permissions, roles, or ownership:**

- Create territory models and all related records (such as territory types)
- View and manage territory models in all states: **Planning**, **Active**, and **Archived**
- Activate, archive, delete, or clone territory models
- View territory information on territory-assigned account records for territories in models in *all* states (**Planning**, **Active**, and **Archived**)


Manage Territories

Users who:

- Create or edit account assignment rules

Require these permissions, roles, or ownership:

Manage Territories AND View All on Accounts

 **Note:** Which fields are available for account assignment rules depends on account field-level security settings, if any. For example, a user has the appropriate permissions for creating account assignment rules, but their profile prevents them from viewing the Account object's `Annual Revenue` field. They can't create account assignment rules that include that field.

- View the Salesforce Setup tree, including territories settings
- View the territory model in `Active` state, including its related records (such as territory types and assignment rules) and other elements (such as the territory hierarchy)
- View the names of all account records assigned to territories in the `Active` territory model
- View territory information on territory-assigned account records for territories in models in the `Active` state only


View Setup and Configuration

View data for models in `Planning` and `Archived` states on reports that include territories, assigned records, or rules

Manage Territories

Manually assign a territory to an opportunity

Sharing access to the opportunity's account. Users who have full access to the account can assign any active territory to the opportunity. Users who do not can assign only a territory that is also assigned to the opportunity's account.

 **Note:** For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but users with full access can search for and assign any territory in the active territory model.

When a territory is assigned to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model hierarchy.

How Does Filter-Based Opportunity Territory Assignment Work?

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

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

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

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

SEE ALSO:

[Territory Type Priority](#)

EDITIONS

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ENABLE FEATURES FOR ENTERPRISE TERRITORY MANAGEMENT

Set up and configure features to get the most from Enterprise Territory Management.

IN THIS SECTION:

[Enable Enterprise Territory Management](#)

Turn on Enterprise Territory Management for your reps. If you started using Salesforce before Winter '15, ask Salesforce to enable the feature.

[Define Default User Access for Territory Records](#)

Specify the default settings for how users can access and modify records associated with the sales territories you set up.

[Enable Filter-Based Opportunity Territory Assignment](#)

To automate assignment of territories to opportunities, enable and configure filter-based opportunity territory assignment.

[Set Up Territory Types and Territories](#)

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

[Assign One or More Territories Manually to an Account](#)

Assign one or more territories to an account directly from the account record.

[Assign One or More Assignment Rules Manually to a Territory](#)

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

[Assign a Territory Manually to an Opportunity](#)

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

[Set Up and Deploy Filter-Based Opportunity Territory Assignment](#)

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

[Manually Exclude an Opportunity from Filter-Based Territory Assignment](#)

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

[Clone a Territory Model](#)

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

EDITIONS

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[Assign Users to Territories](#)

Assign users to the territories they operate in to sell products and services. You can assign users to territories that belong to models in Active or Planning state, though assignments made within Planning state models are for planning purposes only. They don't affect user access to records.

[Identify Users in Territories Assigned to an Account](#)

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

[Identify Territory Users by Territory Role](#)

Track user functions within territories by creating territory roles and assigning them to territory users as needed. For example, create roles such as Territory Owner, Sales Manager, Product Specialist, or Sales Representative. Users can even have different roles in different territories.

[Use Chatter to Collaborate on Territory Models](#)

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

[Activate a Territory Model](#)

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

[Configure Enterprise Territory Management Permissions and Access for Salesforce Admins and Users](#)

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

[Run Assignment Rules for a Territory](#)

Run account assignment rules for any territory that has rules defined and belongs to a territory model in Planning or Active state. When you run rules from Setup, accounts are assigned to territories according to your rules if your territory model is in Active or Planning state.

[Find Out Which Territories an Assignment Rule Applies To](#)

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

Enable Enterprise Territory Management

Turn on Enterprise Territory Management for your reps. If you started using Salesforce before Winter '15, ask Salesforce to enable the feature.

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Enterprise Territory Management:

- Customize Application

Define Default User Access for Territory Records

Specify the default settings for how users can access and modify records associated with the sales territories you set up.

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

You can also choose the access level that users get to the opportunities assigned to their territories' child territories. For example, set the access level to view and edit to let users edit the opportunities assigned to their territories' child territories.

You can change the access provided by default settings when you create or edit a territory. The territory's access level is inherited by the parent territories above it in the territory hierarchy. For example, San Francisco (view opportunities) is a child territory of California (view and edit opportunities). A user assigned to California has *view* access to San Francisco opportunities, not view and edit.

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create a territory model:

- View Setup and Configuration

AND

Manage Territories

To change settings on the Territory Settings page:

- Customize Application

Enable Filter-Based Opportunity Territory Assignment

To automate assignment of territories to opportunities, enable and configure filter-based opportunity territory assignment.

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

EDITIONS

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

USER PERMISSIONS

To enable filter-based opportunity territory assignment:

- Customize Application

Set Up Territory Types and Territories

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

IN THIS SECTION:

1. [Create Territory Types](#)
Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.
2. [Create a Territory Model Record](#)
Create a record to connect territories, user assignments, and account assignments. When you create a territory model record, Salesforce creates a territory hierarchy for it.
3. [Create Territories](#)
Create territories as you build your company's territory model. When you create a territory, it appears on the model's territory hierarchy.
4. [Set Up and Manage Territory Assignments](#)
You assign accounts to territories by creating rules that assign them automatically or adding them manually. You can configure rules to apply to both parent territories and their child territories. Manual assignments apply only to the territory where they're made.

Create Territory Types

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

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

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

SEE ALSO:

[Territory Type Priority](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To build a territory model:

- View Setup and Configuration
- AND
- Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create a territory type:

- View Setup and Configuration
- AND
- Manage Territories

Create a Territory Model Record

Create a record to connect territories, user assignments, and account assignments. When you create a territory model record, Salesforce creates a territory hierarchy for it.

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

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


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

Create Territories

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

By default, each territory model can have up to 1,000 territories. If you're using Developer Edition or Enterprise Edition, the maximum allocation is 1,000 territories per model. If you're using Performance Edition or Unlimited Edition, you can add up to 99,999 territories to a territory model by contacting Salesforce Customer Support. Requests for more than 20,000 territories per model are subject to approval.

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

 **Note:** A territory's access level is inherited by the parent territories above it in the territory hierarchy. For example, San Francisco (view opportunities) is a child territory of California

EDITIONS

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USER PERMISSIONS

To create a territory model record:

- View Setup and Configuration
AND
Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create territories:

- View Setup and Configuration
AND
Manage Territories

(view and edit opportunities). A user assigned to California has *view* access to San Francisco opportunities, not view and edit.

5. Click **Save**.

SEE ALSO:

[Territory Type Priority](#)

Set Up and Manage Territory Assignments

You assign accounts to territories by creating rules that assign them automatically or adding them manually. You can configure rules to apply to both parent territories and their child territories. Manual assignments apply only to the territory where they're made.

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

IN THIS SECTION:

[Use Rules to Assign Accounts to Territories](#)

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. Accounts are assigned to territories according to your rules automatically on account creation or update only if your territory model is in `Active` state.

[Assign Accounts to a Territory Manually](#)

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

[Preview Territory Account Assignments](#)

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


EDITIONS


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Use Rules to Assign Accounts to Territories

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. Accounts are assigned to territories according to your rules automatically on account creation or update only if your territory model is in Active state.

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

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


On the rule edit page, enter a name for the new rule and define selection criteria.

4. If you want the rule to also apply to the current territory's descendents, select the **Apply to child territories** checkbox.
5. If you want the rule to run automatically when a user creates or updates an account, select the **Active** checkbox.

 **Note:** For account updates, these conditions are required for the territory rules to run.

- If the account is updated via the UI, **Evaluate this account against territory rules on save** is selected and the rule is assigned to a territory in the active territory model.
- If the account is updated via API, `AssignmentRuleHeader` is specified.

6. Click **Save** to save the rule and return to the territory detail page.
7. (Optional) In the Assignment Rules Defined in This Territory related list, click **Run Rules**. You receive an email when the process is complete.

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To create or run rules within your territories:

- Manage Territories AND View Setup and Configuration AND View All on Accounts

OR

Customize Application

Assign Accounts to a Territory Manually

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign accounts manually within your territories:

- View Setup and Configuration
- AND
- Manage Territories

Preview Territory Account Assignments

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

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

1. Open the record for the territory model whose assigned accounts you want to preview and click **View Hierarchy**.
2. Verify that the model is in `Planning` state.
3. Click **Run All Rules**.
When rules are finished running, we send an email to let you know. Processing can take some time, depending on the size and complexity of your organization.
4. From the territory model hierarchy, open each territory and descendent affected assignment rules. Also open territories that have manual account assignments.
5. On the territory detail page, click **View Accounts** to see the accounts assigned to the territory. (Accounts assigned to the territory's child territories aren't shown.) The `Method` column indicates how each account was assigned: by a rule or manually.

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

The Manage Territories permission:

- Provides users access to territories in planning and archived state and to the list of accounts assigned to territories in planning and archived state.
- Does *not* provide access to the accounts assigned to territories in planning and archived state. Only the account name and ID fields appear in the list. To run territory planning reports, users must get access to accounts via a method other than the permission.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run rules:

- Manage Territories AND View Setup and Configuration
- OR
- Customize Application

To preview territory model account assignments:

- Manage Territories AND View Setup and Configuration

Assign One or More Territories Manually to an Account

Assign one or more territories to an account directly from the account record.

1. Open the account you want to assign territories to.
2. On the account's Assigned Territories related list, click **Assign Territories**.
3. Select the territory model that contains the territories you want to associate. In Lightning Experience, only the active territory model is available.
4. Select each territory you want to assign.
5. Click **Save** (Lightning Experience) or **Assign** (Salesforce Classic).

EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To assign territories manually within your accounts:

- View Setup and Configuration
- AND
- Manage Territories

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

- View Setup and Configuration
- AND
- Manage Territories

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

- View Setup and Configuration

Assign One or More Assignment Rules Manually to a Territory

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

Territories can have up to 15 assignment rules each.

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign rules to a territory:

- View Setup and Configuration
AND
Manage Territories

Assign a Territory Manually to an Opportunity

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

Users who have full access to an opportunity's account can assign any territory from the active model to the opportunity. Users who do *not* can assign only a territory that is also assigned to the opportunity's account. (The same restriction applies to territory assignments made via Apex in system mode.) For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but users with full access can search for and assign any territory in the active territory model.

1. Open an opportunity record or begin creating an opportunity.
2. In the `Territory` field, select the territory you want to assign.
3. Save your changes.

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To manually assign any territory in the active territory model to an opportunity:

- Full access to the opportunity's assigned (parent) account

 **Note:** In Lightning Experience, full access to the Account object is also required.

Set Up and Deploy Filter-Based Opportunity Territory Assignment

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

IN THIS SECTION:

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

SEE ALSO:

[How Does Filter-Based Opportunity Territory Assignment Work?](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- Customize Application

To run the opportunity territory assignment filter:

- Customize Application

OR

Manage Territories AND View Setup and Configuration

Define the Apex Class for Filter-Based Opportunity Territory Assignment

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- Customize Application

To run the opportunity territory assignment filter:


- Customize Application

OR

Manage Territories AND View Setup and Configuration

Enable Filter-Based Opportunity Territory Assignment

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

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

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

5. Save your settings.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- Customize Application

To run the opportunity territory assignment filter:

- Customize Application

OR


Manage Territories AND View Setup and Configuration

Determine Your Salesforce Org's Territory Priority Values

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

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

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

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

SEE ALSO:

[Territory Type Priority](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- Customize Application

To run the opportunity territory assignment filter:

- Customize Application

OR

Manage Territories AND View Setup and Configuration

Manually Assign Territory Type Priority

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- Customize Application

To run the opportunity territory assignment filter:

- Customize Application

OR

Manage Territories AND View Setup and Configuration

Run the Opportunity Territory Assignment Filter

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- Customize Application

To run the opportunity territory assignment filter:

- Customize Application

OR

Manage Territories AND
View Setup and
Configuration

Manually Exclude an Opportunity from Filter-Based Territory Assignment

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up filter-based opportunity territory assignment:

- Customize Application

To run the opportunity territory assignment filter:


- Customize Application

OR

Manage Territories AND
View Setup and Configuration

Clone a Territory Model

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

 **Note:** If you're cloning a territory model with assignment rules, make sure that any picklist values referenced in the assignment rules are valid. If you've deleted or replaced a picklist value that's referenced in an assignment rule, the picklist value isn't valid, and the cloning process fails.

1. Open the territory model you want to clone.
2. Click **Clone**.
3. Define the label and description fields.
4. Click **Save**.

The model state changes to `Cloning` while Salesforce processes your request. Cloning can take some time, depending on the size and complexity of your model.

During the process, triggers defined against the `Territory2Model`, `Territory2`, or `UserTerritory2Association` objects do not fire.

When the process is complete, we send you an email to let you know.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To clone a territory model:

- View Setup and Configuration
- AND
- Manage Territories

Assign Users to Territories

Assign users to the territories they operate in to sell products and services. You can assign users to territories that belong to models in Active or Planning state, though assignments made within Planning state models are for planning purposes only. They don't affect user access to records.

The number of territories assigned to a user can impact performance. We recommend that you test thoroughly for performance issues, and if you observe any, reduce the number of territories per user.

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS


To assign users to territories:


- Manage Territories

Identify Users in Territories Assigned to an Account

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

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

 **Note:** The `Modified Date` field in this related list tells the last time when the user territory association record was modified. In some cases, it indicates when the user was assigned to the territory.

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

EDITIONS

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

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

USER PERMISSIONS

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

- View Setup and Configuration

AND

Manage Territories

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

- View Setup and Configuration

Identify Territory Users by Territory Role

Track user functions within territories by creating territory roles and assigning them to territory users as needed. For example, create roles such as Territory Owner, Sales Manager, Product Specialist, or Sales Representative. Users can even have different roles in different territories.

IN THIS SECTION:

1. [Define a Picklist for Territory User Roles](#)
Add territory roles to the `UserTerritoryAssociation` object's `Role` in Territory picklist so you can select roles for territory users. The `Role` in Territory picklist you define can be used for all territories in `Active` or `Planning` state.
2. [Assign Territory Roles to Users](#)
Assign territory roles to identify the roles of users within territories.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Define a Picklist for Territory User Roles

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

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

Assign Territory Roles to Users

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

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

EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To define picklists:

- Customize Application

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign territory roles to users:

- View Setup and Configuration
- AND
- Manage Territories

Use Chatter to Collaborate on Territory Models


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

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

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

Activate a Territory Model

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

 **Important:** Only one model can be in the *Active* state at one time in your organization, and you can only activate a model that is in the *Planning* state. After activating a model, you cannot reset it to *Planning* state; you can only set it to *Archived* state. If you use territory forecasts, consider running the opportunity territory assignment filter—or assigning territories to opportunities manually or via the API—to ensure that opportunity revenue rolls up based on the newly activated territory hierarchy.

1. Preview account assignments before activating the model.
2. Open the record for the territory model you want to activate and click **View Hierarchy**.
3. Click **Activate**.

The model state changes to *Activating* while Salesforce processes your request. Activation can take some time, depending on the size and complexity of your model. When the process is complete, we send you an email to let you know.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Chatter Field Tracking:

- Customize Application

To share a Chatter post on a territory model record:

- View Setup and Configuration

AND

Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To activate a territory model:

- View Setup and Configuration

AND

Manage Territories

Configure Enterprise Territory Management Permissions and Access for Salesforce Admins and Users

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign user permissions:

- Manage Users

To create, edit, and delete page layouts:

- Customize Application

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in Planning or Active state. When you run rules from Setup, accounts are assigned to territories according to your rules if your territory model is in Active or Planning state.

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run rules within your territories:

- Manage Territories AND View Setup and Configuration
- OR
- Customize Application

Find Out Which Territories an Assignment Rule Applies To

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view assignment rule details:

- View Setup and Configuration
- AND
- Manage Territories

CREATE CUSTOM REPORT TYPES FOR ENTERPRISE TERRITORY MANAGEMENT REPORTS

Set up custom report types so sales managers and other users can create the reports they need.

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

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Account activities in territories	Accounts	Activities Select "A" records may or may not have related "B" records. Filter report by My Territories' Opportunities or My Territory Team's Opportunities.	–
Accounts assigned to territories	Accounts	Territories Select "A" records must have related "B" records.	–
Accounts not assigned to territories	Accounts	Territories Select "A" records may or may not have related "B" records.	–
Opportunities assigned to territories	Opportunities	– Add a report filter: Territory Name does not equal null.	–

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To delete custom report types:

- Modify All Data


Create Custom Report Types for Enterprise Territory Management Reports

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Opportunities not assigned to territories	Opportunities Add a report filter: Territory Name equals null.	–	–
Territories with assigned accounts	Territory Models	Territories	Territory-Assigned Records Select “B” records must have related “C” records.
Territories without assigned accounts	Territory Models	Territories	Territory-Assigned Records Select “B” records may or may not have related “C” records.
Users assigned to territories	Users	Territories Select “A” records must have related “B” records.	–
Users not assigned to territories	Users	Territories Select “A” records may or may not have related “B” records.	–
Territories with assigned users	Territory Models	Territories	Users Select “B” records must have related “C” records.
Territories without assigned users	Territory Models	Territories	Users Select “B” records may or may not have related “C” records.
Summarizable account information by territory	Accounts	Territories Select Each “A” record must have at least one related “B” record.	–

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

REPORT ON ACCOUNTS ASSIGNED TO TERRITORIES

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

1. Make sure that you have a custom report type that links the Accounts and Territories objects. Specify that the Accounts object *must* have related Territory records, and make all fields on these objects available for reporting.
 2. Click the **Reports** tab, and then click **New Report**.
 3. From the Territory Management category, select the custom report type created for this report, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
 4. Make sure that the Accounts field *Account Name* and the Territories field *Label* appear on the report. If they do not, add them.
 5. (Optional) Filter the report results. To show data from territory models in *Active* state *only*, configure the filter options to show *Territory Model: Label equals <name of active territory model>*. From the Show Me (Lightning Experience) or Show (Salesforce Classic) field, to filter by account ownership, select *My accounts, My team's accounts, or My territory teams' accounts*. To filter by user territory assignment, select *My territories' accounts*.
-  **Important:** If you later activate a different territory model, make sure that you update the territory model name variable in this report.
6. Add any other fields you find useful for this report.
 7. Save the report and run it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run reports:

- Run Reports

To schedule reports:

- Schedule Reports

To create, edit, and delete reports:

- Create and Customize Reports

AND

Report Builder

REPORT ON TERRITORIES WITHOUT ASSIGNED ACCOUNTS

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

1. If you're using Lightning Experience, click **New Report (Salesforce Classic)**, or switch to Salesforce Classic.
2. Make sure that you have a custom report type that links the Territory Models, Territories, and Territory-Assigned Records objects. Specify that the Territories object *may or may not* have related Territory-Assigned records, and make all fields on these objects available for reporting.
3. Click the **Reports** tab, and then click **New Report**.
4. From the Territory Management category, select the custom report type created for this report.
5. Click **Create**.
6. Make sure that the Territory fields *Label* and *Territory Model: Label* appear on the report. If they do not, add them.
7. From the *Filters* dropdown list, select *Cross Filter*. Configure the filter options to show *Territories without Territory-Assigned Records*, and then click **OK**. Configure the filter options to show *Object equals Account*.
8. To show data from territory models in *Active state only*, from the *Filters* dropdown list, select *Field Filter*. Configure the filter options to show *State equals Active*, and then click **OK**.
9. Add any other fields you find useful for this report.
10. Save the report and run it.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To run reports:

- Run Reports

To schedule reports:

- Schedule Reports

To create, edit, and delete reports:


- Create and Customize Reports

AND

Report Builder

REPORT ON USERS NOT ASSIGNED TO TERRITORIES

Manage user assignments to sales territories by reporting on which users haven't been assigned to territories.

1. Make sure that you have a custom report type that links the Users and Territories objects. Specify that the Users object *may or may not* have related Territories records, and make all fields on these objects available for reporting.
 2. Click the **Reports** tab, and then click **New Report**.
 3. From the Territory Management category, select the custom report type created for this report, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
 4. Make sure that the Users field *Full Name* and the Territories field *Label* appear on the report. If they do not, add them.
 5. Configure a cross filter to show *Users without Territories*.
 6. To show data from territory models in *Active* state *only*, configure the filter options to show *Territory Model: Label equals <name of active territory model>*.
-  **Important:** If you later activate a different territory model, make sure that you update the territory model name variable in this report.
7. Add any other fields you find useful for this report.
 8. Save the report and run it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run reports:

- Run Reports

To schedule reports:

- Schedule Reports

To create, edit, and delete reports:

- Create and Customize Reports

AND

Report Builder

REPORT ON TERRITORIES WITH ASSIGNED USERS

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

1. Make sure that you have a custom report type that links the Territory Models, Territories, and Users objects. Specify that the Territory object *must* have related Users records, and make all fields on these objects available for reporting.
2. Click the **Reports** tab, and then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
4. Make sure that the Territory fields *Label* and *Territory Model: Label* and the Users field *Full Name* appear on the report. If they do not, add them.
5. To show data from territory models in *Active* state *only*, configure the filter options to show *State equals Active*.
6. Add any other fields you find useful for this report.
7. Save the report and run it.
8. (Optional) Summarize information by Territory object field *Label* to show each territory with the users assigned to it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run reports:

- Run Reports

To schedule reports:

- Schedule Reports

To create, edit, and delete reports:

- Create and Customize Reports

AND

Report Builder

REPORT ON SUMMARIZABLE ACCOUNT FIELDS BY TERRITORY

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

1. Make sure that you have a custom report type that links the Accounts and Territories objects. Specify that the Accounts object *must have* at least one Territory object record, and make all fields on these objects available for reporting.
2. Click the **Reports** tab, and then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report, and then click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
4. If you're using Salesforce Classic, select *Matrix Format* for the report.
5. Create a row grouping by using the *Label* field from the Territories field list.
6. Create a row grouping by using the *Account Name* field from the Accounts field list.
7. From the Accounts field list, add summarizable fields, such as *Annual Revenue* and *Employees*, to show those totals, and then summarize by *Sum*.
8. (Optional) Filter the report results. From the Show Me (Lightning Experience) or Show (Salesforce Classic) field, to filter by account ownership, select *My accounts*, *My team's accounts*, or *My territory teams' accounts*. To filter by user territory assignment, select *My territories' accounts*.
9. Add any other fields you find useful for this report.
10. Run the report and make sure it shows the data and the arrangement that you want.
11. Save the report.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run reports:

- Run Reports

To schedule reports:

- Schedule Reports

To create, edit, and delete reports:


- Create and Customize Reports

AND

Report Builder

ARCHIVE A TERRITORY MODEL

Archiving a territory model deactivates it, but the model remains in your territory model list. From this list, you can reference the model's associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can archive a model only if it's in the Active state. After archiving a model, you can't return it to the Active state or the Planning state.

 **Warning:** When you archive a territory model, Salesforce deletes your territory forecasts, forecast types, quotas, and adjustments. After you activate another territory model, you must re-create territory forecast types for it. Before you archive a territory model, consider these options.

- Run the opportunity territory assignment filter, and then take screenshots of the forecasts page.
- Create a [snapshot](#). The snapshot is not deleted as part of the archiving process.
- Export your forecasting records, including forecasting items, facts, quotas, and adjustments.

When you archive a territory model, Salesforce also deletes data related to sharing and group associations by territory. To retain this data, export the related records before you archive the territory model.

If you've enabled deferred [group membership calculation](#), we recommend suspending it to avoid issues with group membership cleanup during territory model archival. You can re-enable deferred group membership calculation after archival is completed.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**.
2. Open your active territory model.
3. Click **Archive**, and then click **Archive Territory Model** to confirm.

The model state changes to **Archiving** while Salesforce processes your request. When processing is complete, the model state changes to **Archived**, and you receive a confirmation via email. This process can take some time, depending on the size and complexity of your organization.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To archive a territory model:

- **Manage Territories AND View Setup and Configuration**

DELETE A TERRITORY MODEL

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

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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


USER PERMISSIONS

To delete a territory model:

- Manage Territories AND View Setup and Configuration

DISABLE ENTERPRISE TERRITORY MANAGEMENT

You can disable Enterprise Territory Management for your team and use another means of record sharing.

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

1. If you haven't already, [archive your active territory model](#) before disabling Enterprise Territory Management.
2. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
3. Click **Disable Territory Management 2.0**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To disable Enterprise Territory Management:

- Customize Application