Territory Planning Implementation Guide

Salesforce, Spring ’26

Last updated: November 17, 2025

CONTENTS

TERRITORY PLANNING

Design high-performing territories that promote a fair distribution of work, eliminate gaps in coverage, and improve customer experiences with your company.

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 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.

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What's 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

Distribute sales opportunities and service requests among your reps who use Territory Planning. Optimized territories deliver improved sales and service, reduced operating costs, and higher employee morale.

Easy Integration with Sales Territories

Automate the process for creating models, territories, and assignment rules when you publish them from Territory Planning to Sales Territories. Or import models and users from Sales Territories.

What's 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:Review what happens when you import Salesforce data into Territory Planning.

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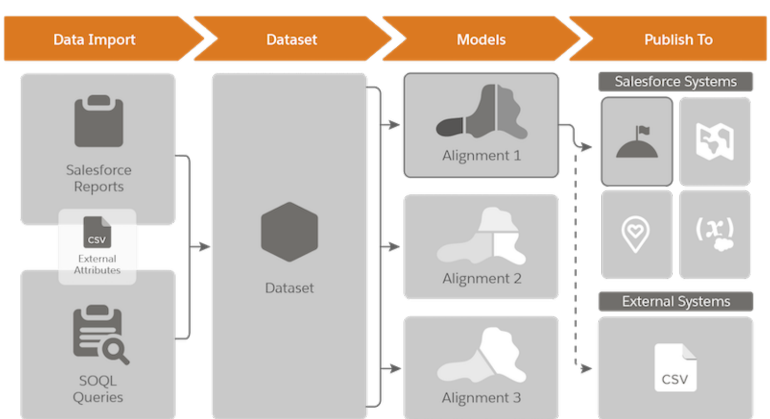

Stage	What's Happening Here
Data Import	You import data, such as accounts, leads, opportunities, and cases using Salesforce reports and queries. Supplement the data that you import with attributes from external sources in a CSV file.
Dataset	Territory Planning stores the Salesforce data that you import 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 Sales Territories. • 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.

- 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.

How Territory Planning Helps Drive Sales and Service

Distribute sales opportunities and service requests among your reps who use 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.

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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 Sales Territories.

How Territory Planning Helps	What Sales and Service Operations Can Accomplish
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 • 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 Sales Territories

Automate the process for creating models, territories, and assignment rules when you publish them from Territory Planning to Sales Territories. Or import models and users from Sales Territories.

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

When you...	Territory Planning...
Publish to Sales Territories	Creates the Sales Territories: • Territory model • Territories • Assignment rules • Assignments of primary territory users After you publish a territory design to Sales Territories, 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 Sales Territories	Lets you create territory models—or alignments—based on the model and its assigned users from Sales Territories.

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Key Concepts for Territory Planning

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

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Dataset Concepts
Create territory plans using live Salesforce data or Salesforce data that you copy into datasets for Territory Planning.

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

Alignment Concepts
Model your territories in alignments that you create from your datasets in 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 Territory Planning.

Dataset Concepts

Create territory plans using live Salesforce data or Salesforce data that you copy into datasets for Territory Planning.

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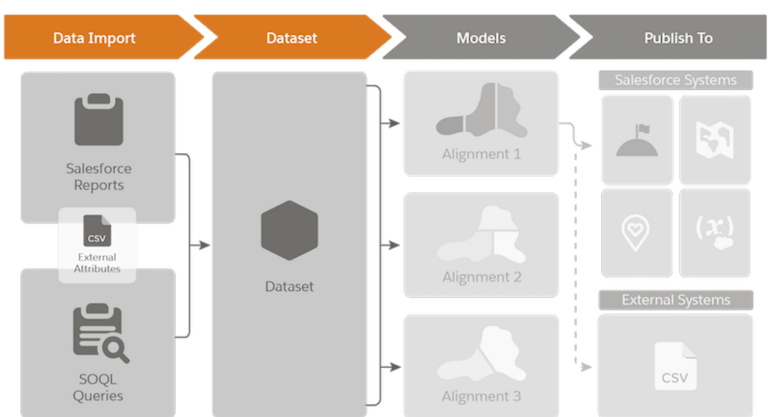
It's best to plan territories with live Salesforce data. That way, you can ensure that your territory planning always reflects updates to Salesforce records. If you prefer to work with copied data, import it into Territory Planning datasets. If you import data, depending on your business processes, consider refreshing your data sources periodically so that Territory Planning includes more current, relevant Salesforce data.



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

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 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.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.

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

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.

For units with...	Territory Planning...
	• 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 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.We see how the data that you import plays a key role in the alignments that you publish.

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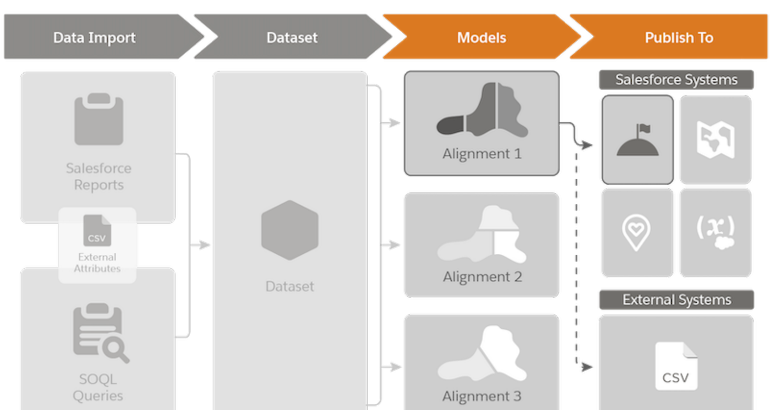

What Happens When You Publish Alignments

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...
Sales Territories	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 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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Preparing for Territory Planning

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

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Configure Options for Data Management
Control how Territory Planning loads, processes, and shows data.

Designate an OAuth User for Data Processing and Optimizations
Assign yourself or a colleague as the OAuth user. 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.

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 Territory Planning.

Add and Create Roles for Users Assigned to Sales Territories
Let your sales and service teams assign specific territory team roles from Salesforce to areas in Territory Planning. Each role that you create maps to a territory team role. After you create alignments and publish them to Sales Territories, assigned users and their roles appear in Salesforce territory models.

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

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 Territory Planning. And designate who can publish approved alignments.

Configure Options for Data Management

Control how Territory Planning loads, processes, and shows data.

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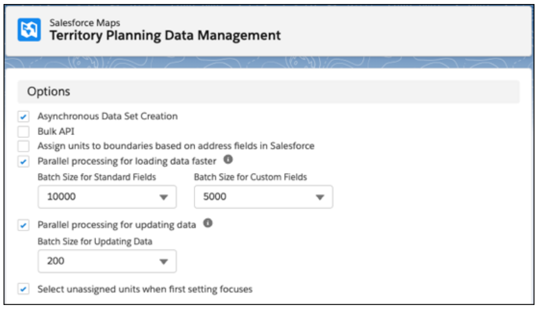
USER PERMISSIONS

To customize settings:
- Customize Application

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. Click **Data Management**.
4. Select and set options for managing data.



Territory Planning saves your changes.

Designate an OAuth User for Data Processing and Optimizations

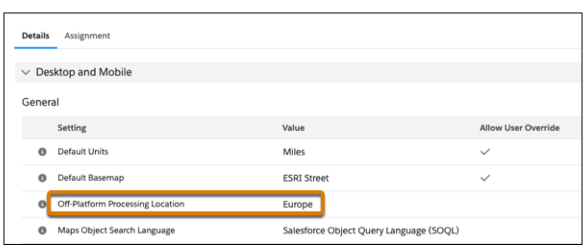
Assign yourself or a colleague as the OAuth user. Territory Planning processes data management and alignment optimizations through the OAuth user on Salesforce Maps servers. That way, nobody's affected during intensive system processing.

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. To meet data residency requirements, open your permission groups and set **Off-Platform Processing Location** to the location that matches your Salesforce instance location. For example, your Salesforce instance is based in Europe, so you set your off-platform processing location to Europe in each permission group.



5. Select **OAuth**. Then, click **Authorize**.

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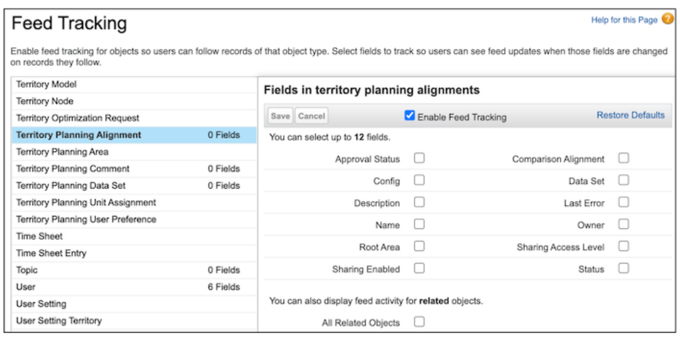
6. Click **Allow Access**.

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 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** and **Territory Planning Dataset**.



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Add and Create Roles for Users Assigned to Sales Territories

Let your sales and service teams assign specific territory team roles from Salesforce to areas in Territory Planning. Each role that you create maps to a territory team role. After you create alignments and publish them to Sales Territories, 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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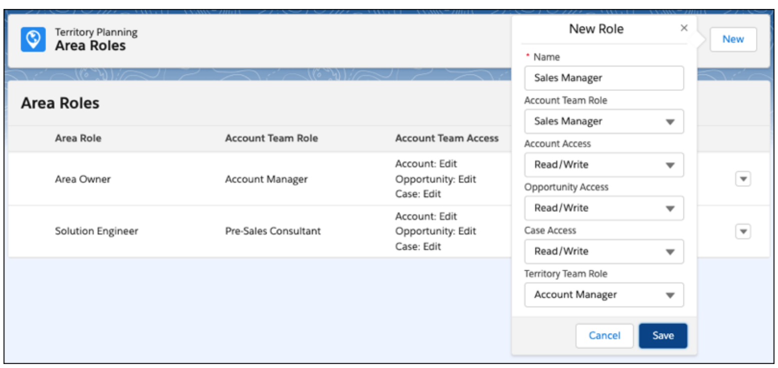

To assign a territory team role to...	Do this...
The default area owner	On the Area Owner role, click **Edit**, and then select its corresponding territory team role from Sales Territories. Keep in mind that you can change the territory team role assignment, but you can't delete the default area owner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

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 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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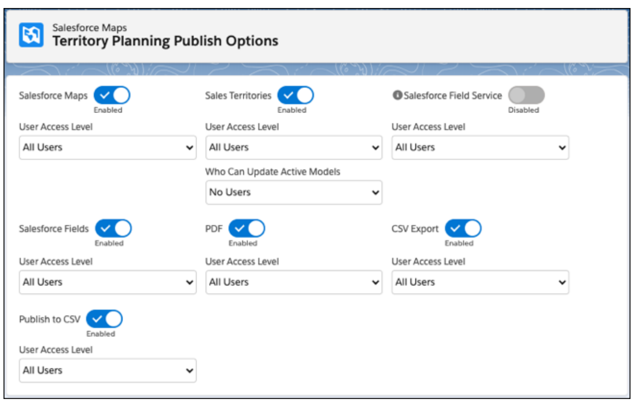

Setting Up Approvals for Alignments and Publishing

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

Alignment Approval Methods

Consider tradeoffs between different methods for approving alignments in Territory Planning.

Set Up a Process for Alignment Approvals and Publishing

Specify who can approve changes to alignments, and in which sequence they can approve them. And specify who can publish those approved alignments in Territory Planning.

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Alignment Approval Methods

Consider tradeoffs between different methods for approving alignments in Territory Planning.

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Salesforce as Your Approval Method

This method restricts access to alignments among designated stakeholders and requires approvals in the sequence that you define. You specify who can access alignments submitted for approval. Also, the Salesforce method requires:

- An approval process for the Territory Planning Alignment object.
- Territory Planning licenses for everyone added to the approval process.
- Salesforce Enterprise, Performance, Unlimited, or Developer editions.

In addition, when using the Salesforce method, Territory Planning:

- Prevents edits to submitted and approved alignments.
- Doesn't provide the option to revoke approved alignments.
- Prompts stakeholders to request access to submitted alignments when they don't already have access.

Territory Planning as Your Approval Method

This method gives unlimited access to all alignments for anyone who can approve them, regardless of order. Anyone you designate for approving alignments has full access to all alignments in Territory Planning.

Set Up a Process for Alignment Approvals and Publishing

Specify who can approve changes to alignments, and in which sequence they can approve them. And specify who can publish those approved alignments in Territory Planning.

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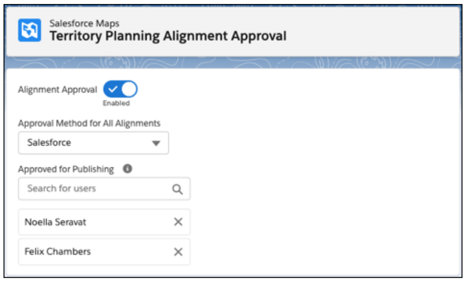
1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Under Territory Planning, click **Alignment Approval**, and then turn on **Alignment Approval**.
4. Select the method that you want to use for alignment approvals.

   For example, to apply the principle of least privilege and enforce a sequence of approvals based on a hierarchy that you established using a Salesforce approval process, select **Salesforce**. Or to give specific users access to all alignments and grant those users approval rights regardless of order, select **Territory Planning**.



5. For the Territory Planning method, specify who can approve alignments.

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 Territory Planning from reports that you run using your custom report types.

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Create Custom Report Types That Integrate with Sales Territories

Gather account and territory data in custom report types for integrating Territory Planning with Sales Territories. 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 Sales Territories.

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 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 Territory Planning datasets using those reports and the data in them.

Create Custom Report Types That Integrate with Sales Territories

Gather account and territory data in custom report types for integrating Territory Planning with Sales Territories. 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 Sales Territories.

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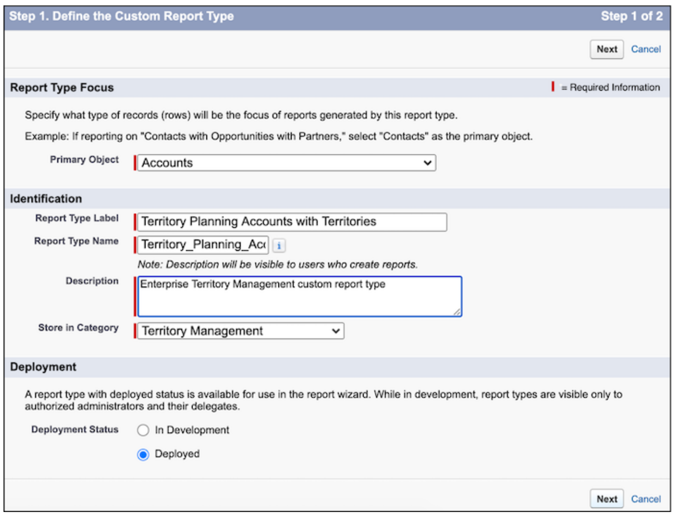
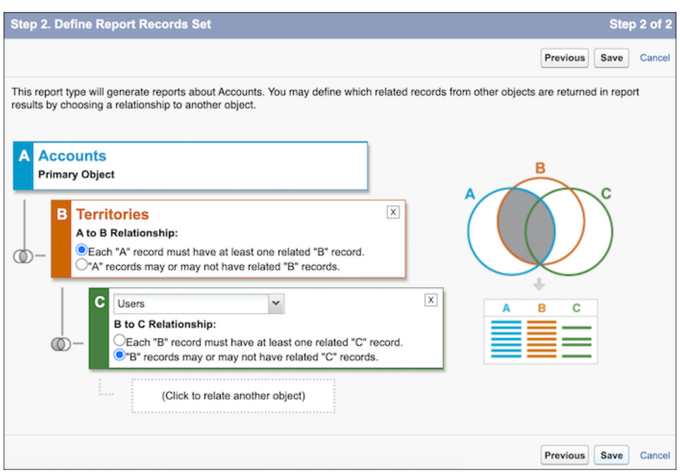
To create custom report types:

- 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 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.

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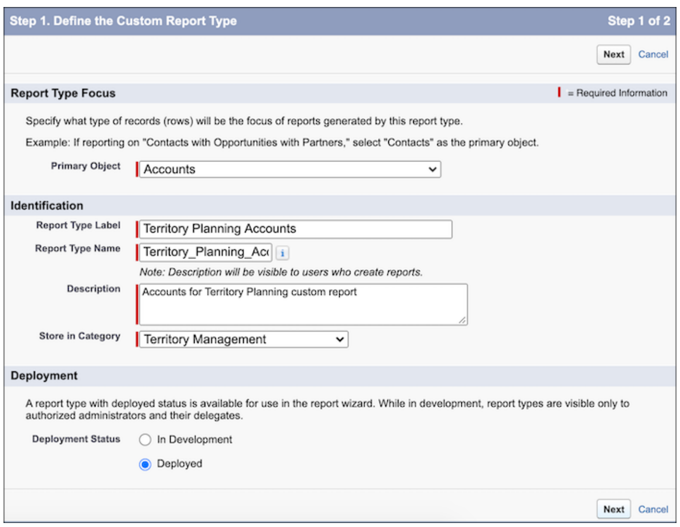
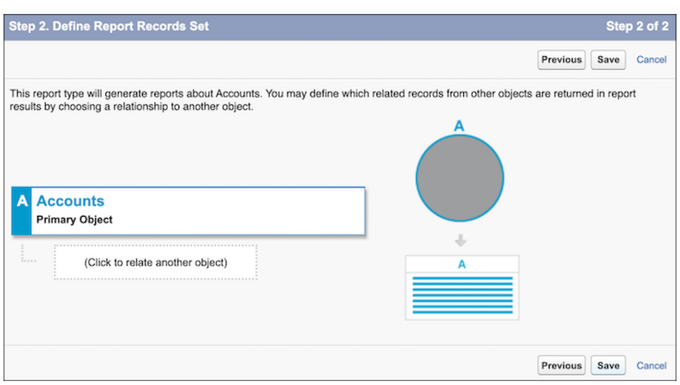
To create custom report types:

- 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 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**.

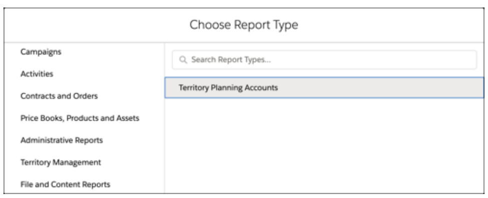


6. Save your work.

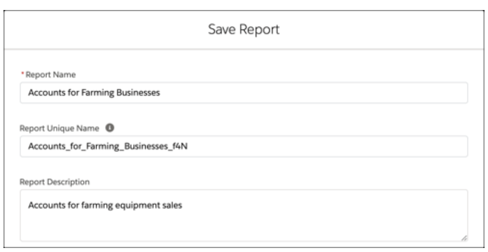
Run Reports from Your Custom Report Types

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 Territory Planning 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

Specify which Salesforce data to include in Territory Planning from reports that you run using your custom report types and SOQL queries that you write.

[Allow Assignments to Boundary and Country Fields](#)
Keep unit assignments consistent across Salesforce, Territory Planning, and Sales Territories. Territory Planning matches boundary and country fields for unit assignments so the assignments stay the same throughout the planning process.

[Create Datasets from Reports](#)
Plan territories by specifying which Salesforce records to include in Territory Planning datasets. For your data sources, you select from reports that you've run from your custom report types.

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 SOQL Queries]

Plan territories by specifying which Salesforce records to include in datasets by using SOQL queries that you write in Territory Planning.

[Create Datasets That Include High Account Volumes]

Import high volumes of accounts while staying within dataset allocations. Aggregate records as a single unit within each territory boundary in Territory Planning.

Allow Assignments to Boundary and Country Fields

Keep unit assignments consistent across Salesforce, Territory Planning, and Sales Territories. Territory Planning matches boundary and country fields for unit assignments so the assignments stay the same throughout the planning process.

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. From Territory Planning Data Management, select the option to assign units based on address fields in Salesforce.

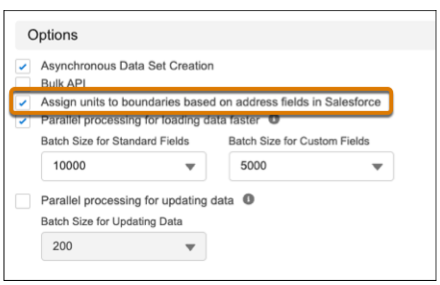
EDITIONS

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

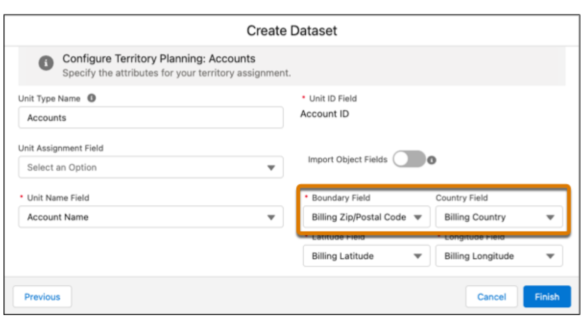
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize settings:
- Customize Application



4. In Territory Planning, create a dataset. Select values for the boundary and country fields where you want units assigned, such as billing postal code and billing country. If your boundary field already includes country information, such as USA_12345, the country field isn't required.



5. Click **Finish**.
6. Create an alignment using the dataset with defined boundary and country fields, and plot it on the map. Units are assigned to the boundaries and countries you specified.

Create Datasets from Reports

Plan territories by specifying which Salesforce records to include in Territory Planning datasets. For your data sources, you select from reports that you've run from your custom report types.

EDITIONS

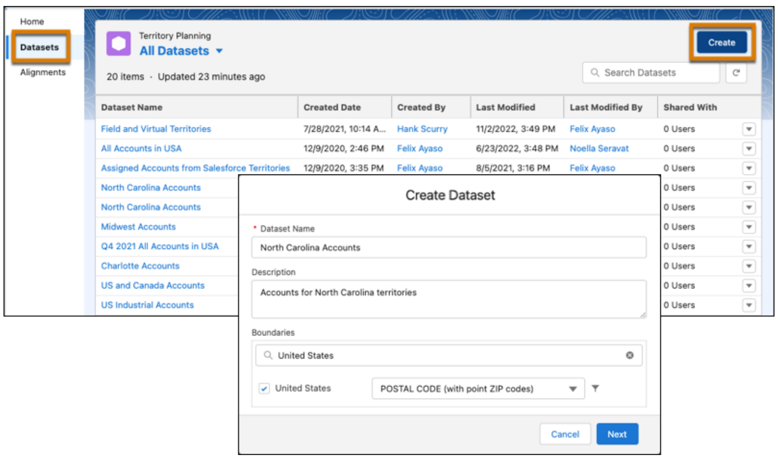
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

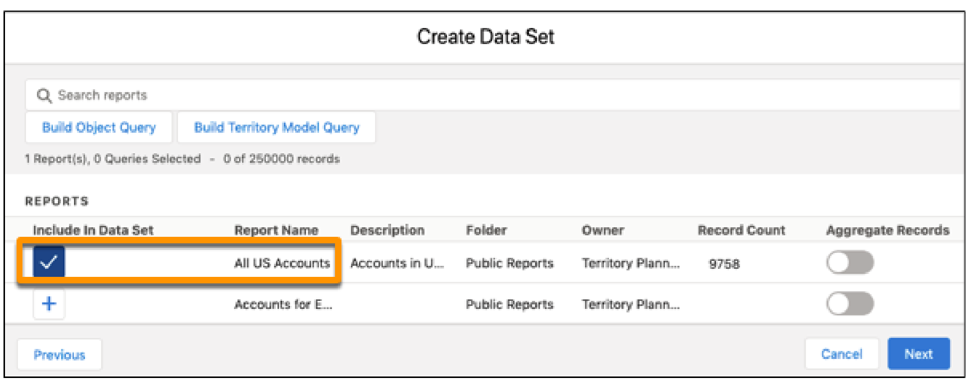
USER PERMISSIONS

To customize settings:
- Customize Application

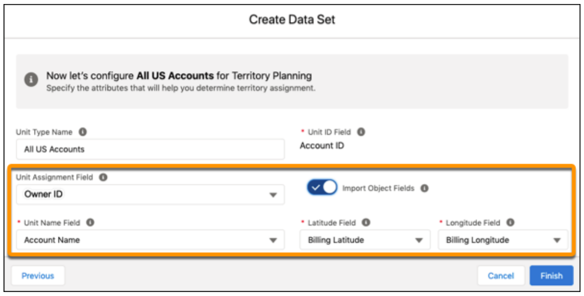
1. Click **Datasets**, then click **Create**. Specify whether you want to plan territories with live or copied data. Enter a name for the dataset and click **Next**.



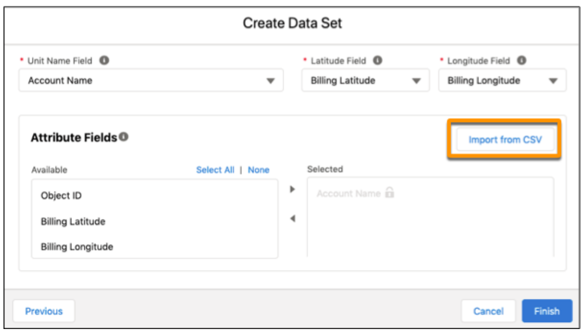
2. Select the reports that you want to include. If the reports collectively include more than the 250,000 record allocation for each dataset, aggregate records for any selected reports. Then click **Next**.



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.



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

Plan territories by specifying which Salesforce records to include in datasets by using SOQL queries that you write in Territory Planning.

1. To include high volumes of data into your datasets, 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**. Specify whether you want to plan territories with live or copied data. Enter a name for the dataset and click **Next**.

EDITIONS

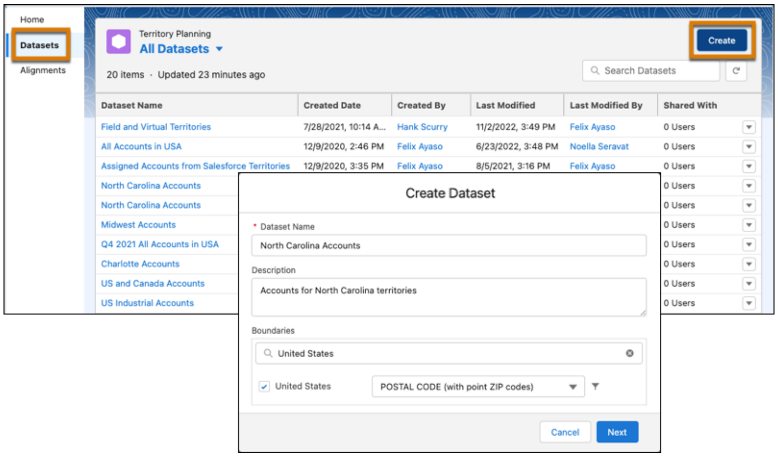
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

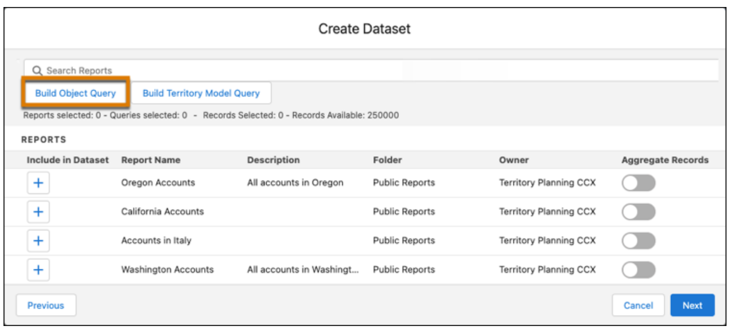
USER PERMISSIONS

To customize settings:

- Customize Application



3. Click **Build Object Query**.

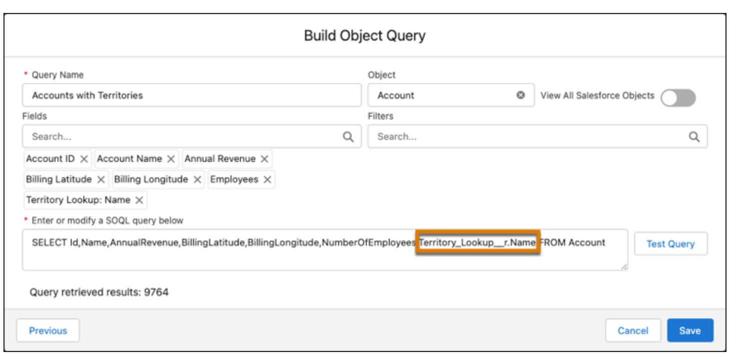


4. Give your query a name, then select an object.
5. Select the fields that you want to add or modify. To add field filters, select only the filters that include unencrypted fields. Avoid adding filters that include encrypted fields, such as those encrypted with Shield Platform Encryption.

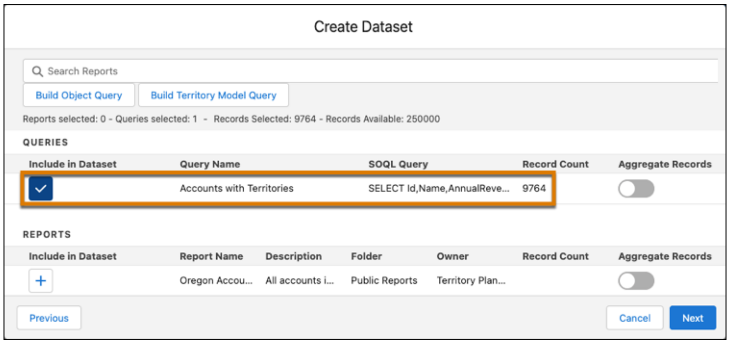
   You can adjust the query directly. For example, use dot notation to pull fields from objects that the base object looks up to.

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

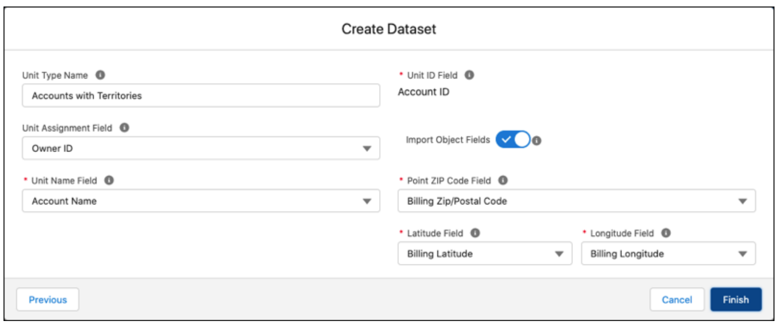
   To join data from one object to another, specify custom relationships. For example, you plan territories for accounts and you want to relate custom territory information, such as territory IDs and names, to them.



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 dataset allocations. Aggregate records as a single unit within each territory boundary in 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

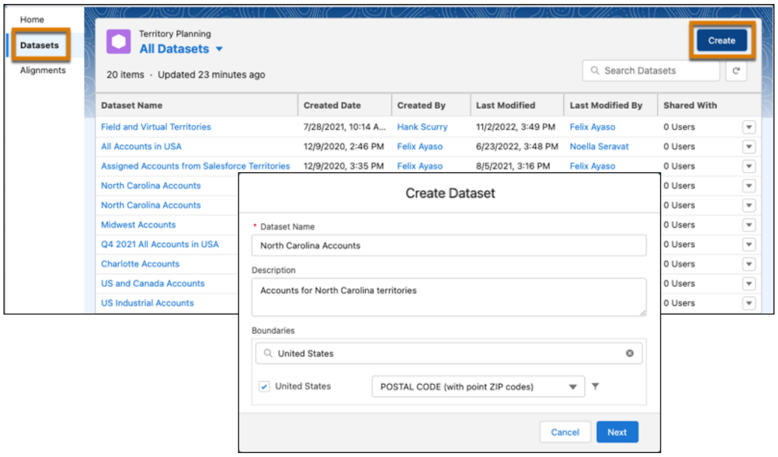
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

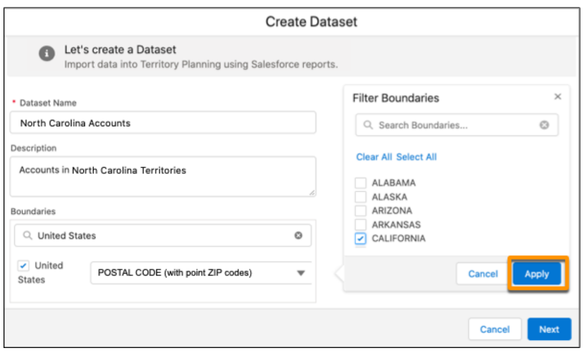
USER PERMISSIONS

To customize settings:

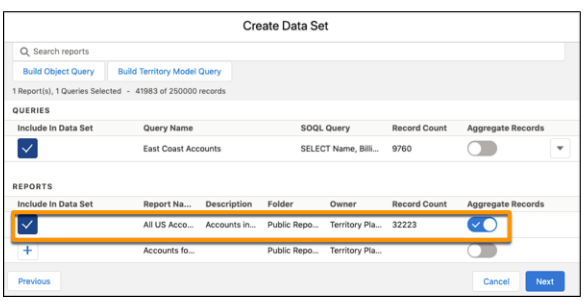
- Customize Application



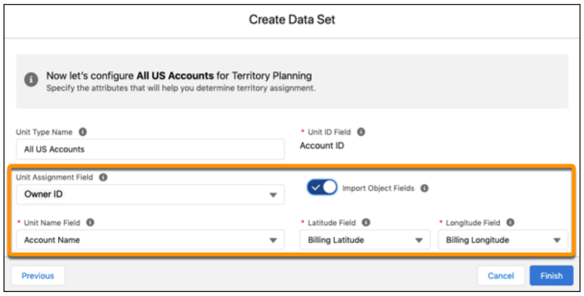
3. Select territory boundaries and filter them as needed, then click **Apply** > **Next**.



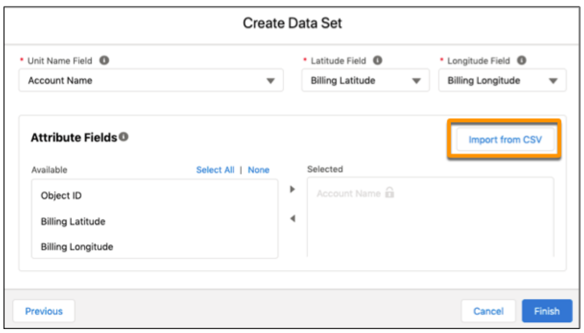
4. Include any combination of reports and SOQL queries as your sources. If you expect to exceed the 250,000 record allocation for your dataset, select **Aggregate Records** for any of your sources. While aggregating records reduces granularity for some records, it helps you stay within the dataset's 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 Territory Planning. Then publish your alignments to Sales Territories, Salesforce Maps, or Field Service. Update the Salesforce fields of your choice with the latest 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

Creating Alignments

Design visual representations of your territory hierarchies in 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.

Publishing Alignments

Put your territory alignments into action when you publish them to Sales Territories, Salesforce Maps, or Field Service. Update specific fields in Salesforce with the latest territory data and encourage feedback on alignments among sales and service leadership in PDF files that you create within Territory Planning.

Creating Alignments

Design visual representations of your territory hierarchies in 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.

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 Alignments from Scratch
Build territory models from the top or from a sample model in Territory Planning. Set up regions, districts, and territories that reflect the structure of your sales and service areas.

Create Alignments from Salesforce Territory Models
Redesign territory models that you create in Sales Territories when you import them into Territory Planning. Adjust regions, districts, territories, and assignment rules so that they reflect your sales organization's changing requirements.

Create Alignments Based on Other Alignments
Design territory models using other alignments that you created in Territory Planning. Adjust regions, districts, and territories. Then compare alignments so that you gain insight on the variations that give your sales and service teams optimal territory coverage.

Create Alignments from a Dataset's Source
Plan territory models using a data source that contributes to your dataset in Territory Planning. For example, you want to create an alignment that includes only US accounts that a specific Salesforce report captured for your dataset.

Create Alignments from External Territory Model Data
Account for compelling events in proprietary and third-party territory management systems when you import their model data into Territory Planning. Refine and optimize models from the map, then publish them to CSV files. Use the CSV files when you update those territory management systems later.

Create Alignments from Scratch

Build territory models from the top or from a sample model in Territory Planning. Set up regions, districts, and territories that reflect the structure of your sales and service areas.

EDITIONS

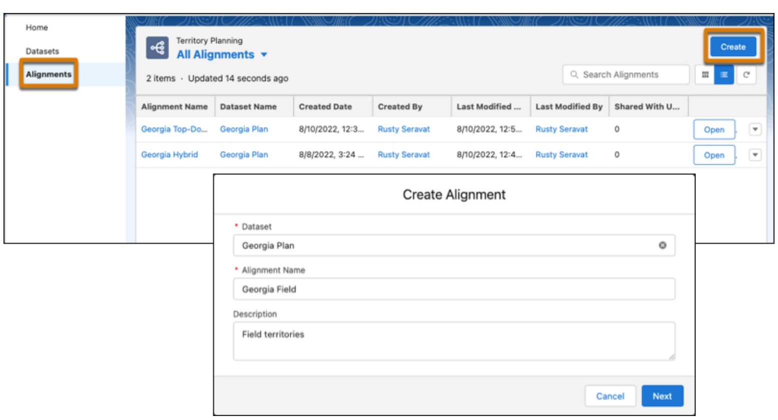
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

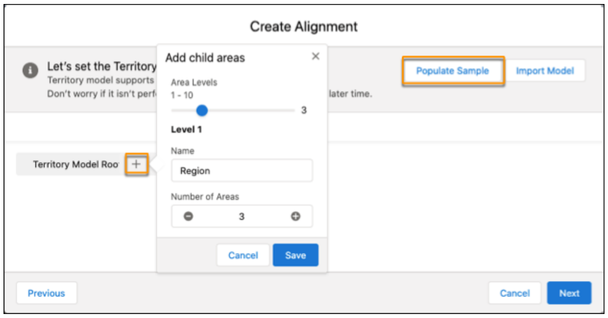
USER PERMISSIONS

To customize settings:
- Customize Application

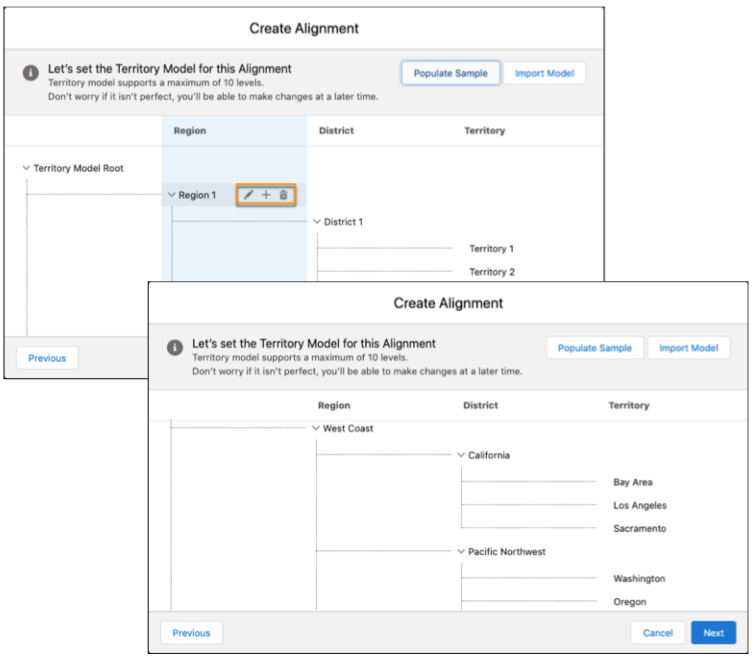
1. Click **Alignments**, then click **Create**. Enter a dataset and name for the alignment and click **Next**.



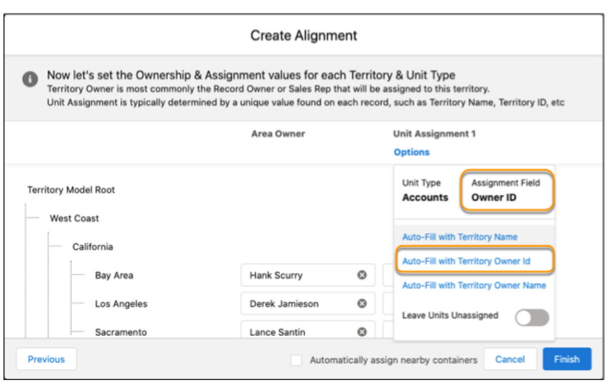
2. Set the area levels that you want for the model's root structure, or add a sample structure that you tailor for your company's requirements.



3. Hover over each area and rename them so that they reflect your sales and service areas. Add or remove areas so that they reflect your sales and service structure.



4. Add area owners, then select an option for unit assignments that corresponds with the assignment field from the dataset. Click **Finish**.



Create Alignments from Salesforce Territory Models

Redesign territory models that you create in Sales Territories when you import them into Territory Planning. Adjust regions, districts, territories, and assignment rules so that they reflect your sales organization's changing requirements.

EDITIONS

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

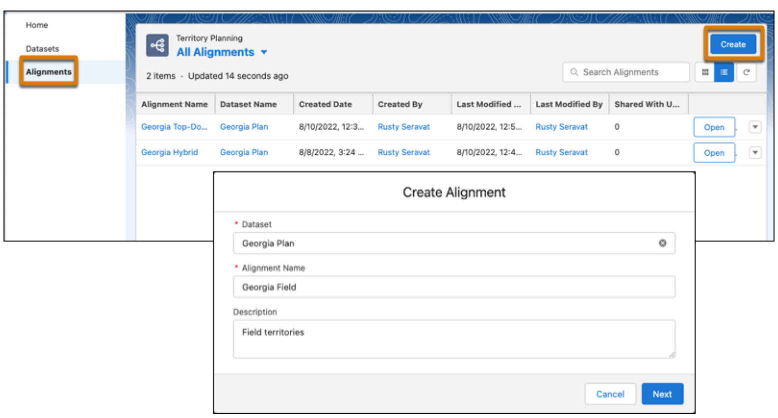
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

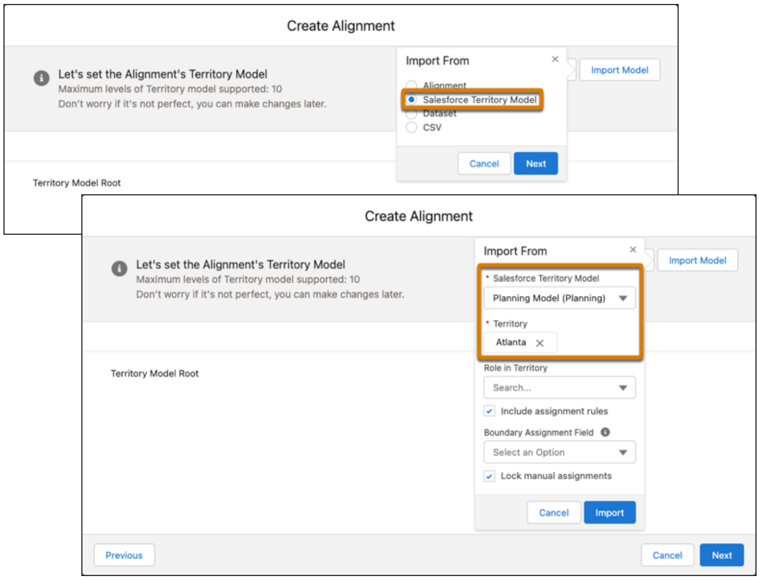
To customize settings:

- Customize Application

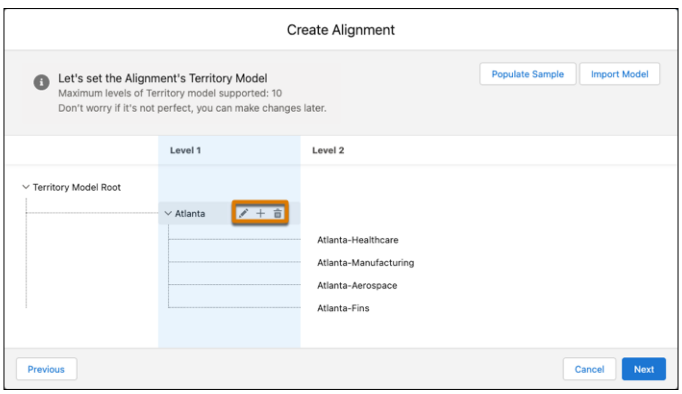
1. Click **Alignments**, then click **Create**. Enter a dataset and name for the alignment and click **Next**.



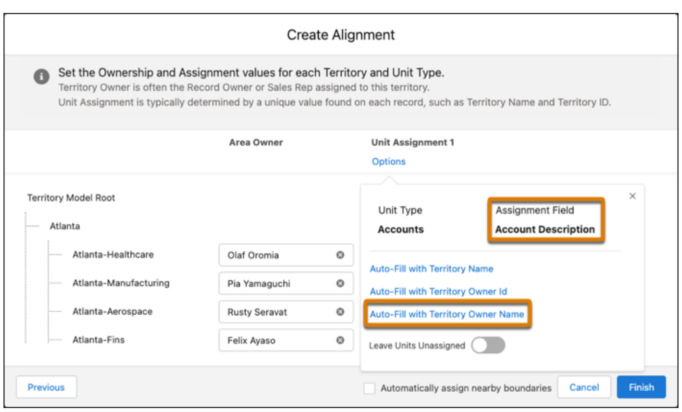
2. Select **Import Model** > **Salesforce Territory Model** > **Next**. Select a territory model and the scope of the model that you want to import from Sales Territories and indicate whether to include the model's assignment rules. Then click **Import**.



3. To change area names, hover over each one and rename them so that they reflect current areas. Add or remove areas so that they represent your updated structure.



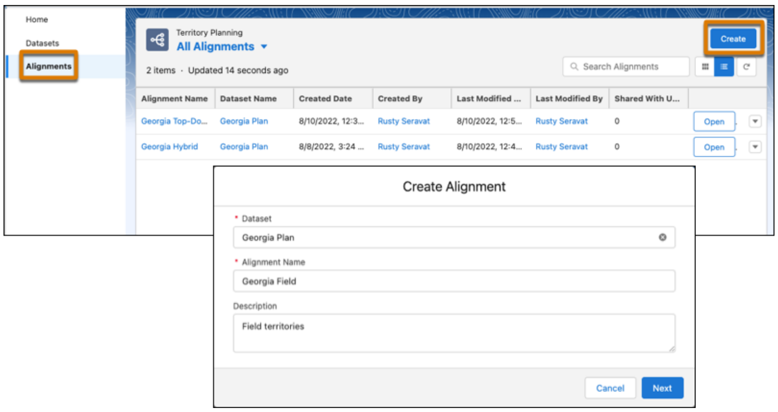
4. Add area owners, then select an option for unit assignments that corresponds with the assignment field from the dataset. Click **Finish**.



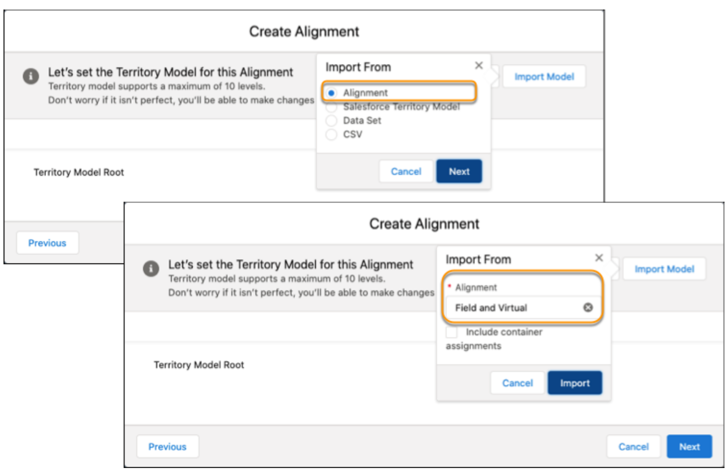
Create Alignments Based on Other Alignments

Design territory models using other alignments that you created in Territory Planning. Adjust regions, districts, and territories. Then compare alignments so that you gain insight on the variations that give your sales and service teams optimal territory coverage.

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



2. Select **Import Model** > **Alignment** > **Next**. Select an alignment that you want to base your new alignment on, then click **Import**.



3. To change area names, hover over each one and rename them so that they reflect current areas. Add or remove areas so that they represent your updated sales structure.

EDITIONS

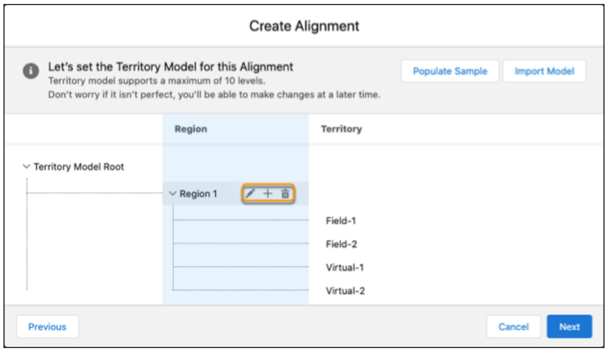
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

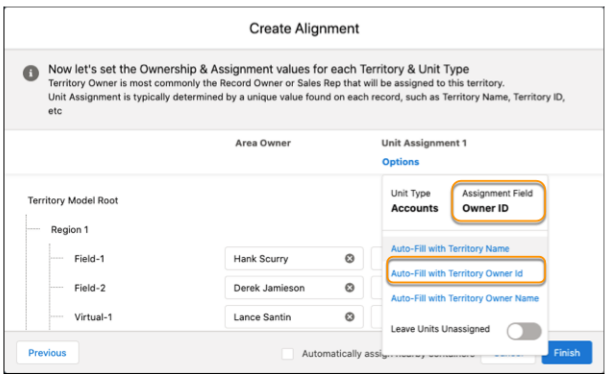
USER PERMISSIONS

To customize settings:

- Customize Application



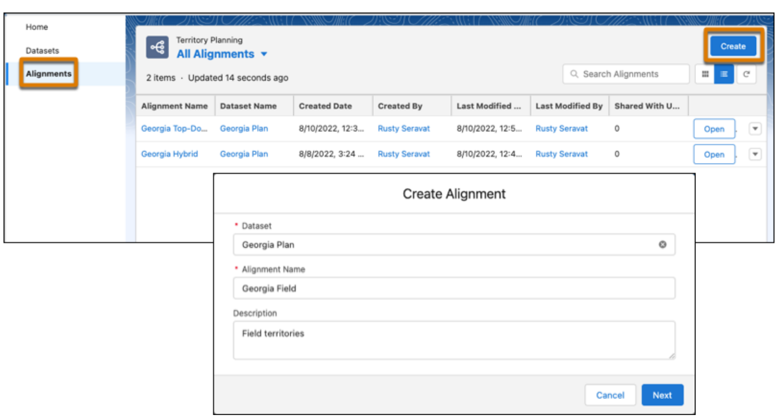
4. Add area owners, then select an option for unit assignments that corresponds with the assignment field from the dataset. Click **Finish**.



Create Alignments from a Dataset's Source

Plan territory models using a data source that contributes to your dataset in Territory Planning. For example, you want to create an alignment that includes only US accounts that a specific Salesforce report captured for your dataset.

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



EDITIONS

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

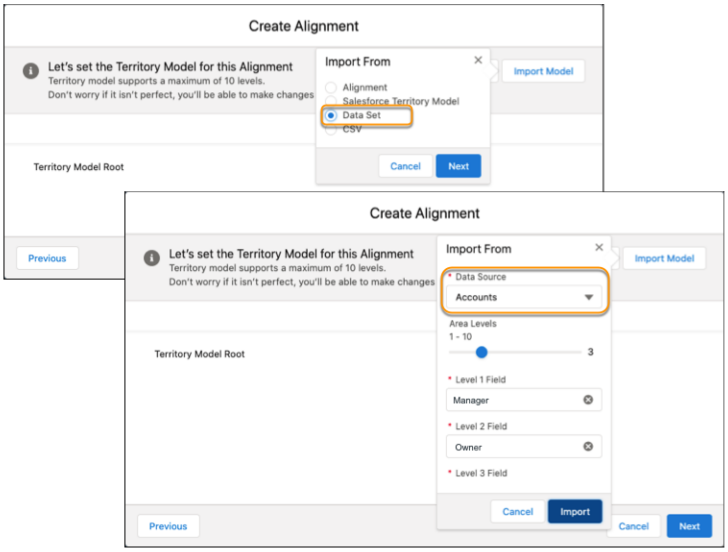
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

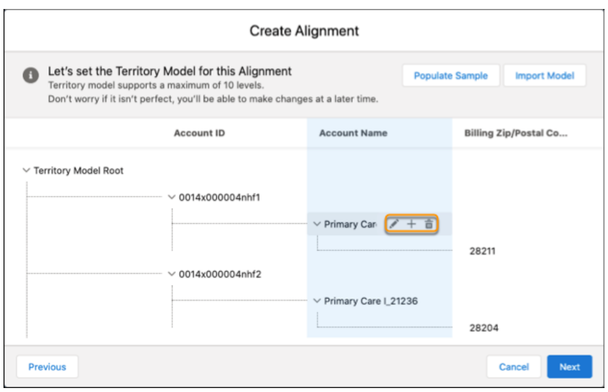
To customize settings:

- Customize Application

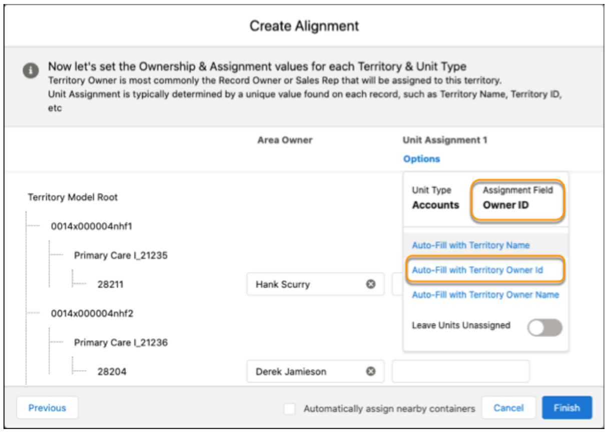
2. Select **Import Model** > **Dataset** > **Next**. Select a data source that contributes to your dataset, then set the area levels that you want for the model's root structure. Click **Import**.



3. To change area names, hover over each one and rename them so that they reflect current areas. Add or remove areas so that they represent your sales and service structure.



4. Add area owners, then select an option for unit assignments that corresponds with the assignment field from the dataset. Click **Finish**.



Create Alignments from External Territory Model Data

Account for compelling events in proprietary and third-party territory management systems when you import their model data into Territory Planning. Refine and optimize models from the map, then publish them to CSV files. Use the CSV files when you update those territory management systems later.

EDITIONS

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

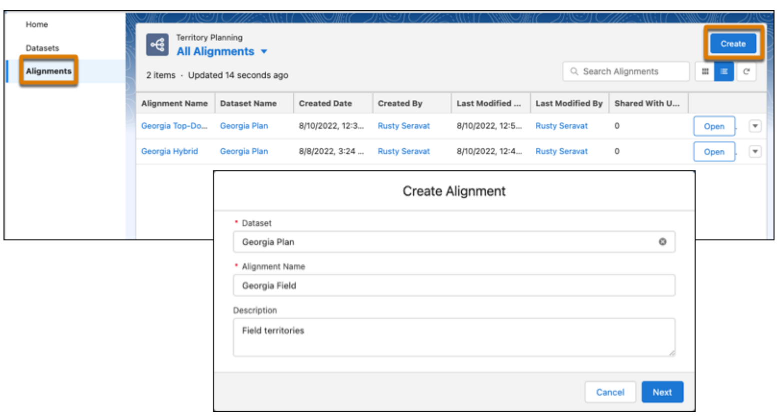
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

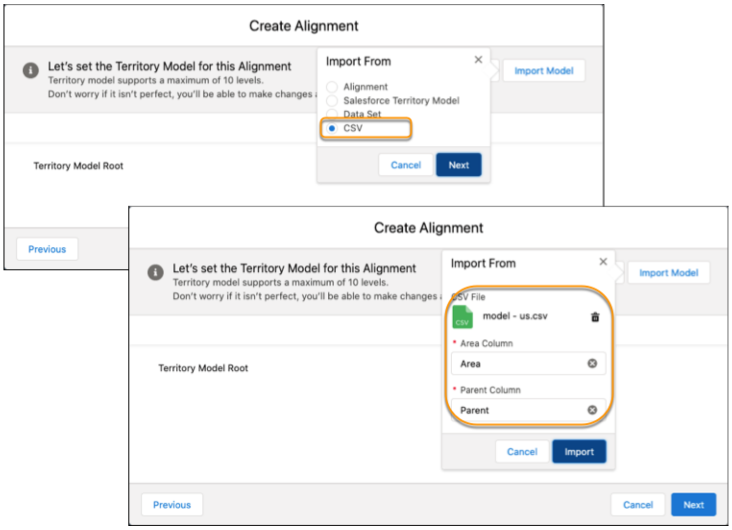
To customize settings:

- Customize Application

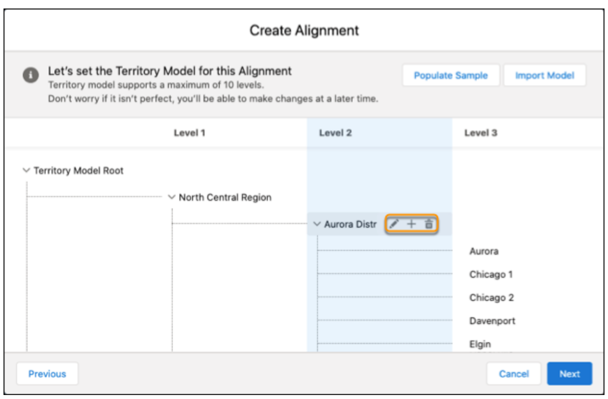
1. Before you import a CSV file, ensure that the parent value is blank for your top-level territories.
2. Click **Alignments**, then click **Create**. Enter a dataset and name for the alignment and click **Next**.



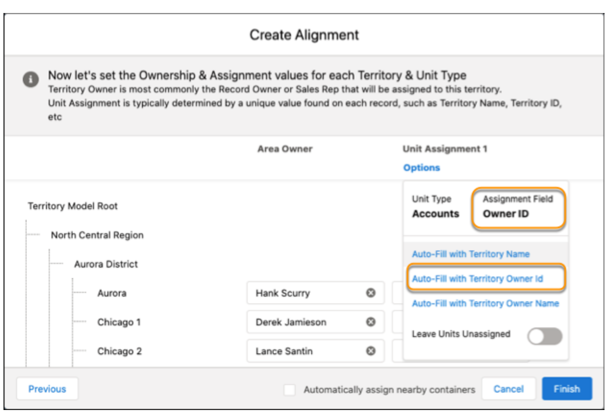
3. Select **Import Model** > **CSV** > **Next**. Then select a CSV file that includes the territory model data that you want to import, and specify the area and parent columns. Click **Import**. If any records fail to import, download the log file from the data import summary, fix the errors, and import the CSV file again. If all records import, no data import summary appears.



4. To change area names so that they reflect current areas, hover over each one and rename them. Add or remove areas so that they represent your updated sales and service structure.



5. Add area owners, then select an option for unit assignments that corresponds with the assignment field from the dataset. Click **Finish**.



Publishing Alignments

Put your territory alignments into action when you publish them to Sales Territories, Salesforce Maps, or Field Service. Update specific fields in Salesforce with the latest territory data and encourage feedback on alignments among sales and service leadership in PDF files that you create within 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

Publish Alignments to Sales Territories

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

EDITIONS

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

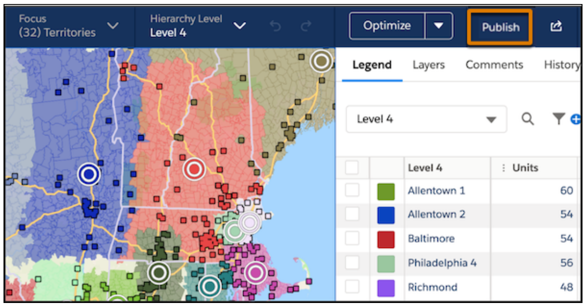
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:

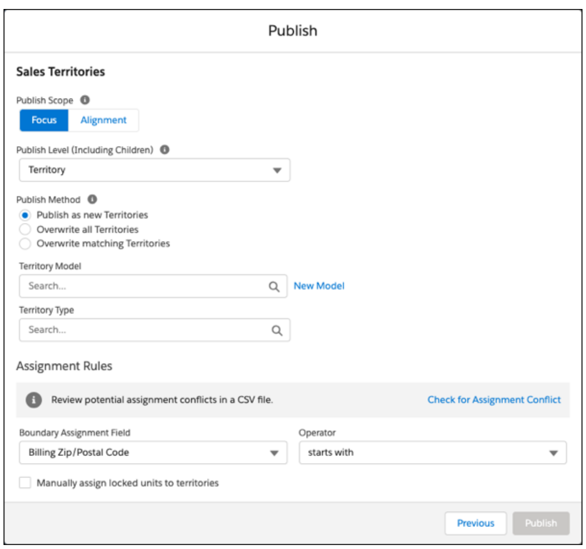
- Customize Application

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



2. Select **Sales Territories**, and click **Next**.

3. Select the scope of what to publish.



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.

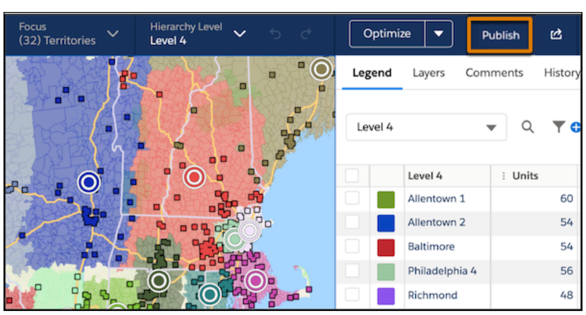
If you want to...	Select...
Not publish assignment rules for this territory	**Skip Assignment Rules**
Publish the minimum required values by editing assignment rules	**Simplify Rules**
Divide the territory into as many child territories as necessary to capture its assignment rules and publish the child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

Salesforce Maps works with providers, such as the US government, which supply data for your shape layers. Periodically, these providers update their data, which means that your shape layers reflect those updates whereas your previously created datasets in Territory Planning don't. Publishing alignments based on datasets that contain legacy boundaries can result in shape layers appearing in a way you don't expect. See Shape Layers and Data Source Updates.

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



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

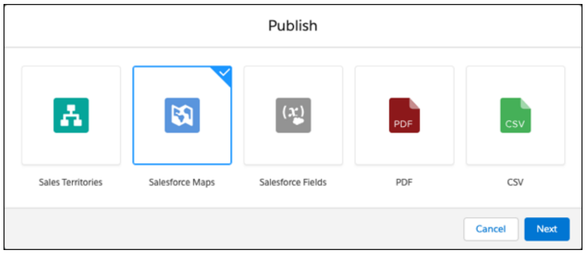
EDITIONS

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

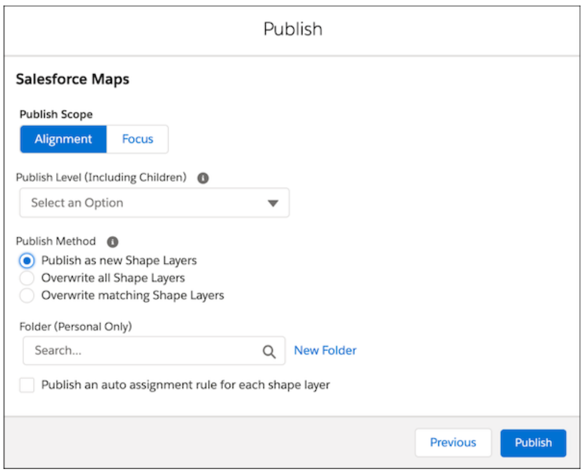
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

USER PERMISSIONS

To customize settings:
- Customize Application



3. Select the scope of what to publish.



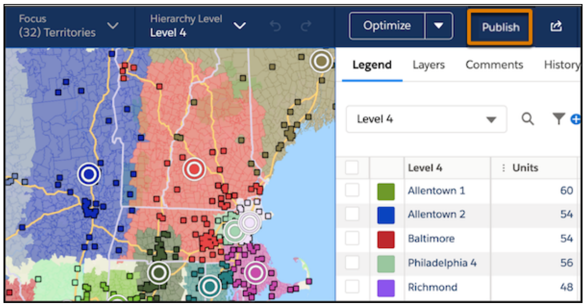
For Example, to Publish...	Select...
The entire alignment when you create hierarchies for the first time or transition to a new planning model	**Alignment**
Your current focus when you change one area and want to publish those changes	**Focus**

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**.

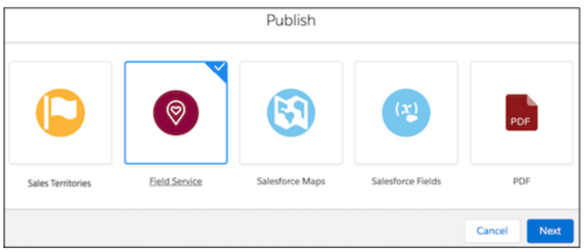
Publish Alignments to Field Service

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

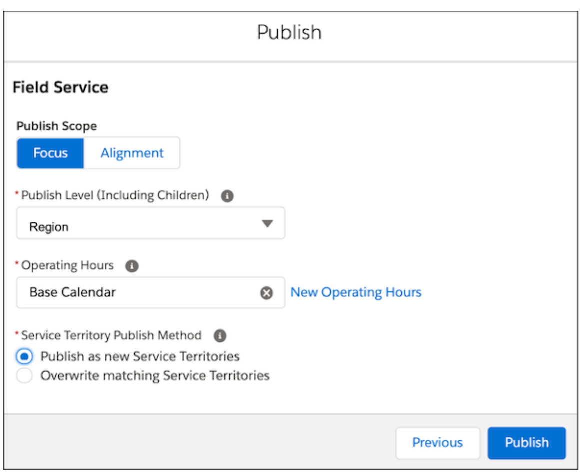
1. From the map, click **Publish**.



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



3. Select the scope of what to publish.



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**

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. 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 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.

EDITIONS

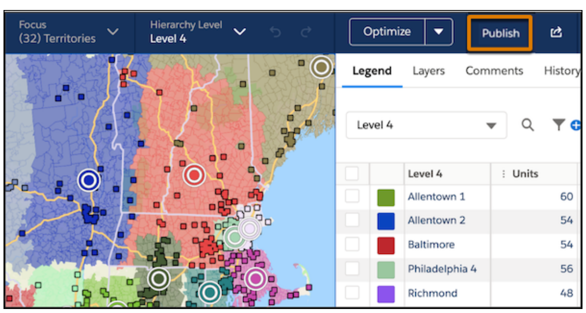
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

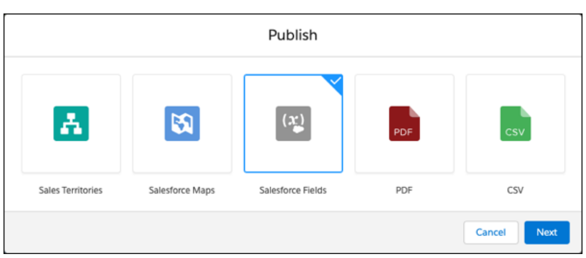
USER PERMISSIONS

To customize settings:
- Customize Application

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



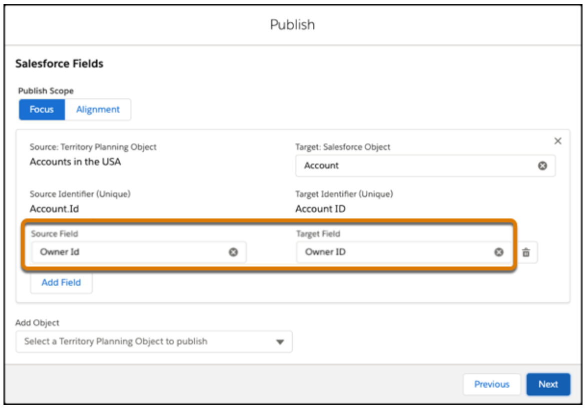
2. Select **Salesforce Fields**, and click **Next**.



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.

Publish Territory Data to Use in Other Systems

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

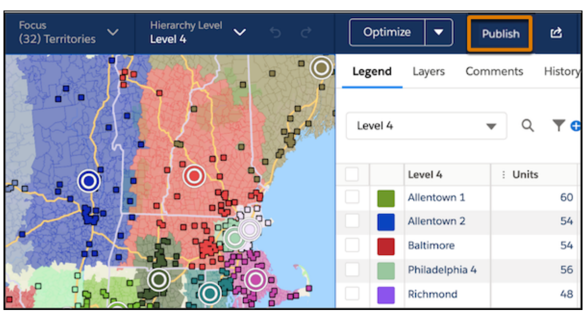
USER PERMISSIONS

To customize settings:

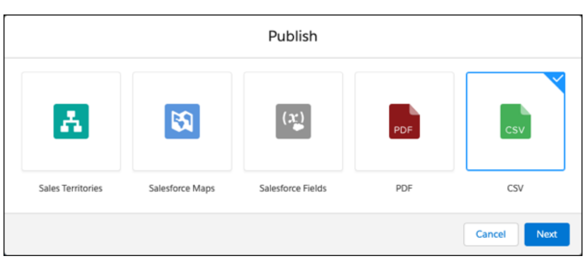
- Customize Application

Plan your territory models in Territory Planning and import them into proprietary and third-party systems. Choose the territory model data that you publish to CSV files, which can include your territory model or specific areas, boundaries, and units.

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



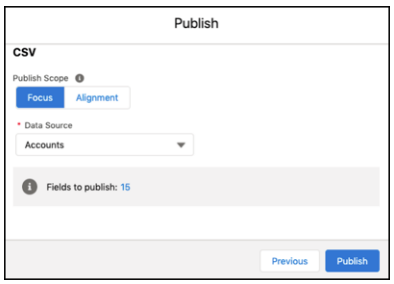
2. Select **CSV**, then click **Next**.



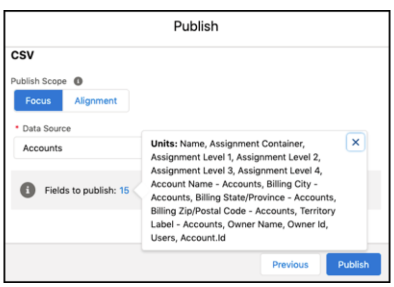
3. Select the scope of what to publish.

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

4. Select the data source that you want to publish.



5. To see the fields you're about to publish, click the highlighted number.



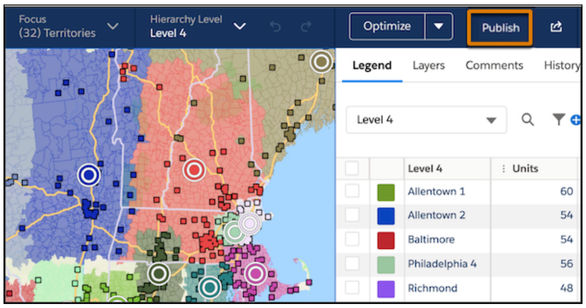
6. Click **Publish**.

   Territory Planning downloads a CSV file that you can import into other systems.

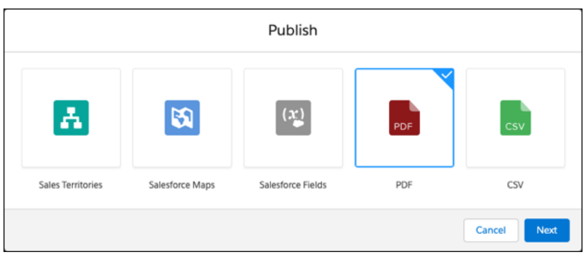
Share Alignments in PDF Files

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

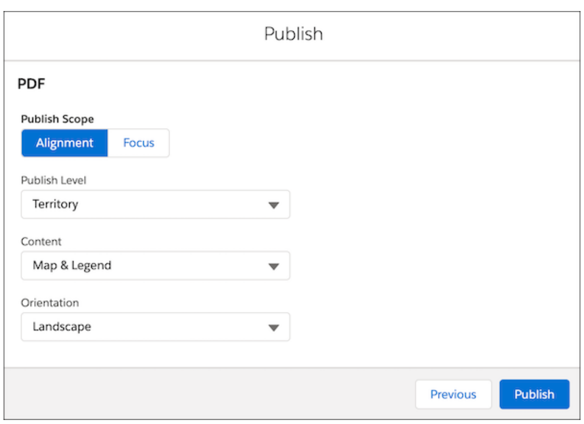
1. From the map, click **Publish**.



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**
Your current focus when you change one area and want to publish those changes	**Focus**

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. 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 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.

Control Access to Datasets

Give stakeholders access to datasets and all the alignments within them in Territory Planning. Add teammates to a dataset and select their level of access.

Control Access to Alignments

Give stakeholders access to alignments and specific areas within alignments in Territory Planning. To give access to all alignments within a dataset, add teammates to the dataset. Or limit access to specific alignments or alignment areas when you select them for each teammate along with their access level.

EDITIONS

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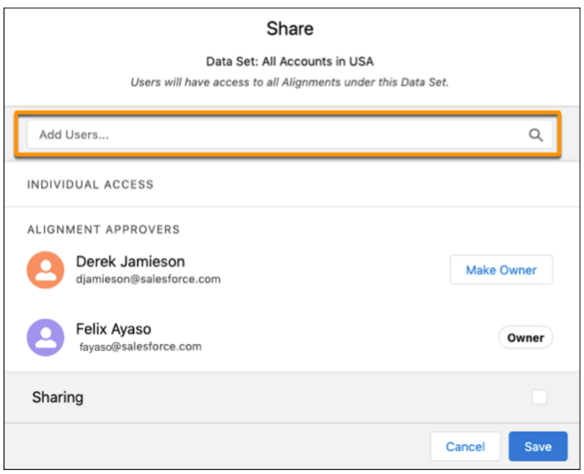
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Web Services API enabled

Control Access to Datasets

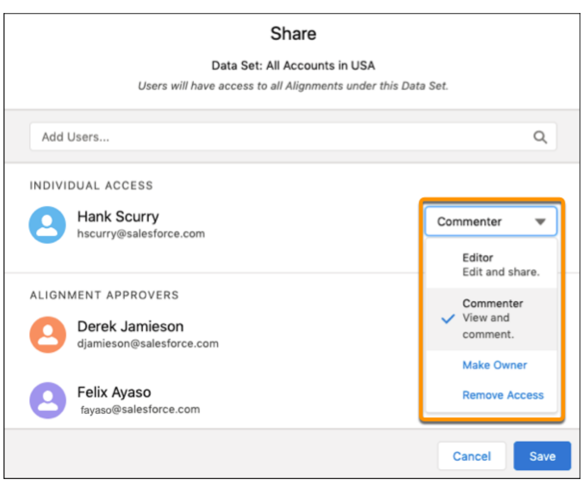
Give stakeholders access to datasets and all the alignments within them in Territory Planning. Add teammates to a dataset and select their level of access.

1. Navigate to the dataset that you want to grant access to. Then select **Share**.

2. To share the dataset and all of its alignments, add users to the dataset.



3. Select the level of access that you want the user to have, then save your changes.



EDITIONS

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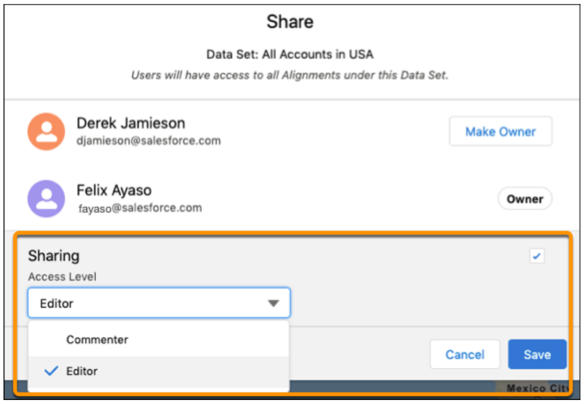
USER PERMISSIONS

To customize settings:

- Customize Application

4. To share a dataset and its alignments with all Territory Planning users, select **Sharing** and an access level.



5. Save your changes.

Control Access to Alignments

Give stakeholders access to alignments and specific areas within alignments in Territory Planning. To give access to all alignments within a dataset, add teammates to the dataset. Or limit access to specific alignments or alignment areas when you select them for each teammate along with their access level.

1. Navigate to the alignment that you want to grant access to. Then select **Share**. Or, find your area in the map legend or the territory model editor and click **Share**.

EDITIONS

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

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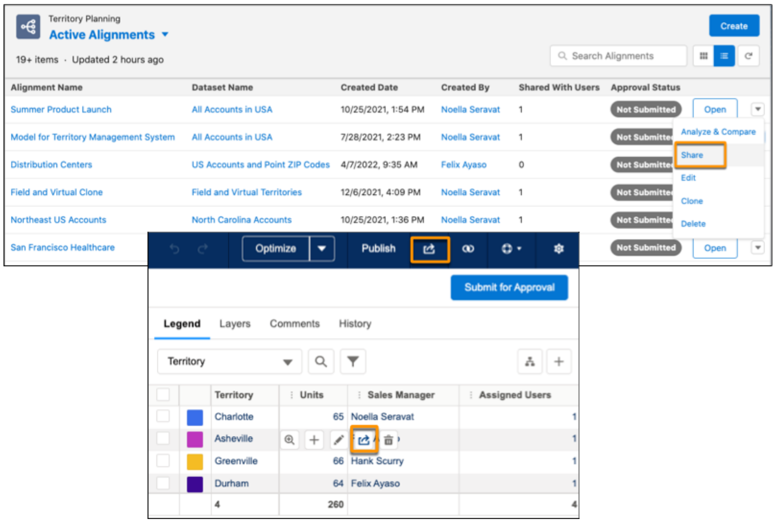
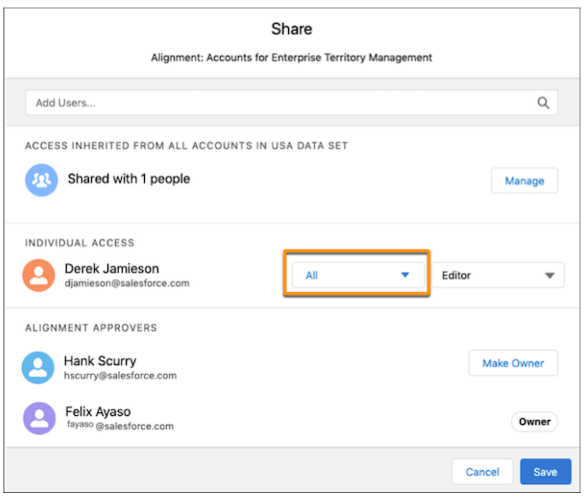
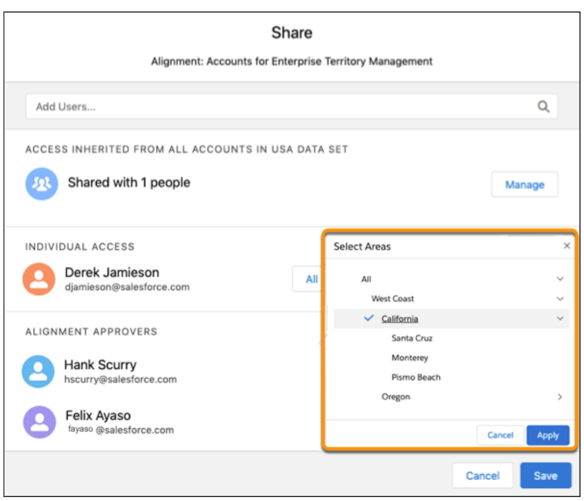
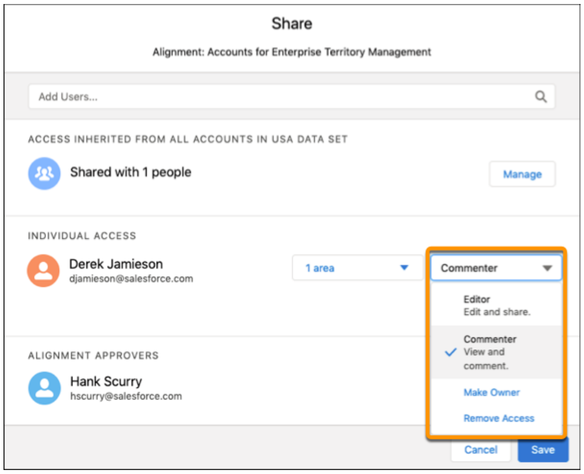


2. To share an alignment or its areas, add a user, select the areas that you want them to have access to, and then click **Apply**.

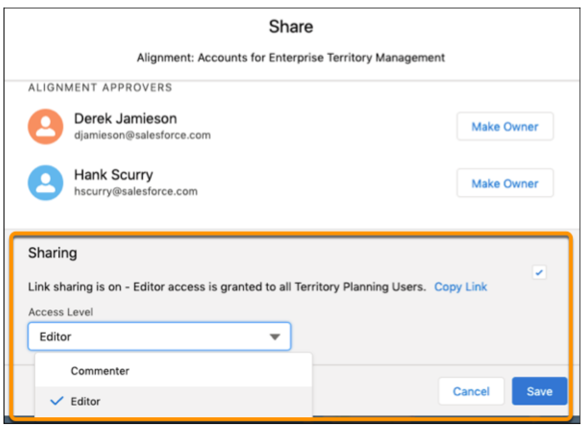




3. Select the level of access that you want the user to have, and then save your changes.



4. To turn link sharing on and share an alignment or its areas with all Territory Planning users, select **Sharing** and an access level.



5. Save your changes.