Territory Management in Depth

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

Notes :- Account ownership and its effect on record sharing remains valid and unchanged when territory management is in use.

Territory management only affects Accounts and standard objects that have a master-detail relationship to accounts.

For Ex – Opportunities are included in territory management but Leads are not.
Key benefits of using Terriotory Management :-

1. The ability to use account criteria to expand a private sharing model.
2. Support complex and frequently changed sales organization structure.
3. Support for transferring users between territories, with option to retain opportunities.
4. Multiple forecasts per user, based on territory membership.
5. Territory based sales report.

What is a Territory ?

- A territory is a collection of Accounts and Users where the users have at-least read access to accounts, regardless of account owner.
- Users in a territory can be granted read, read/write or owner like access(i.e. ability to view, edit , transfer and delete records) to the accounts in that territory.
- Both Accounts and Users can exist in multiple territories.
- You can add account to territories either manually or account assignment rules.
- You can also controller users' access to Opportunity or Cases associated with Accounts in the territory, regardless of who own the records.

What is Territory Hierarchy ?

Territory exist in hierarchy which you can set up with as many nested level as you wish. Territory hierarchy does not depend on geography, they can be defined however you like.

Enabling Territory Management –

Your organization must have customizable forecasting enabled before territory management can be turned on.

If you plan to deploy territory management immediately after enabling customizable forecasting, you do not need to build forecast hierarchy. After you enable territory management, the territory hierarchy drives your forecast data.
When enabling territory management, you have the option to create your territory hierarchy from your forecast hierarchy. Your forecast hierarchy is automatically derived from your role hierarchy when you enable customizable forecasting.
Notes –

- A territory can have unlimited number of users and a user can be assigned to unlimited number of territories.
- In the context of a specific territory, users have both active status and active in territory status.
- Users with Active in Territory checked on the territory detail page have open opportunities, closed opportunities, or no opportunities at all in that territory.
- Users with Active in Territory deselected have been transferred out of or removed from the territory, but retain ownership of opportunities in the old territory.

Forecast Manager for Territory :-

- A territory can have only one forecast manager.
- Forecasts from child and lower-level territories roll up to forecast managers.
- If a territory has no forecast manager, there is no forecast for that territory.
- Forecast managers can receive opportunities when users are transferred out of or removed from a territory.

- Forecast managers can receive opportunities when account assignment rules are run.
- On the territory settings page, you can enable forecast managers to act as delegated administrators for territories below them in the hierarchy.

Managing Account Assignment Rules :-

Account assignment rules are governed by the following :

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

For example, you have three territories:

Territory A has four rules marked "Apply to child territories", and is a parent of territory B.

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

Territory C has two rules.

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