Territory management

Territory management is an **Account sharing system (also its Related List objects)** that grants access to accounts based on the characteristics of the accounts. It provides a powerful solution for structuring your **users, accounts, and their associated contacts, opportunities, and cases.**

- Territory Management is available only for organizations that use **Customizable Forecasting**.
- **Enabling Territory** management **can be reversed**. Enable, implement, and test Territory Management in a sandbox environment before enabling it in production. There are two different options for enabling territory management.
  - **Enable Territory Management:** your organization’s current forecast hierarchy and forecast data are automatically copied to the territory hierarchy
  - **Enable Territory Management from Scratch:** All preexisting forecast data is deleted. An empty territory hierarchy is created
- Accounts & Users can be associated with multiple territories. An Opportunity can be associated with only one Territory.
- When you edit groups, roles, and territories, sharing rules are automatically recalculated to add or remove access as needed.
- When architecting a territory management solution, consider the following to determine whether Territory Management is a good fit with your organization’s business requirements.
  - Forecasting
  - Rule source
  - Sales structure
  - Rule complexity
  - Sharing performance

Managing your organization’s territories involves the following tasks:

- Organize territories into hierarchies that represent your organization’s forecasting requirements and how users work in your organization.
- Configure organization-wide settings for territory management.
- Create new territories and edit existing territories.
- Assign users to territories.
- Define **account assignment rules** that evaluate accounts and assign them to territories.
- Select accounts from lists and manually assign them to territories.

Key benefits of territory management include:

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

Territory hierarchy vs Role hierarchy

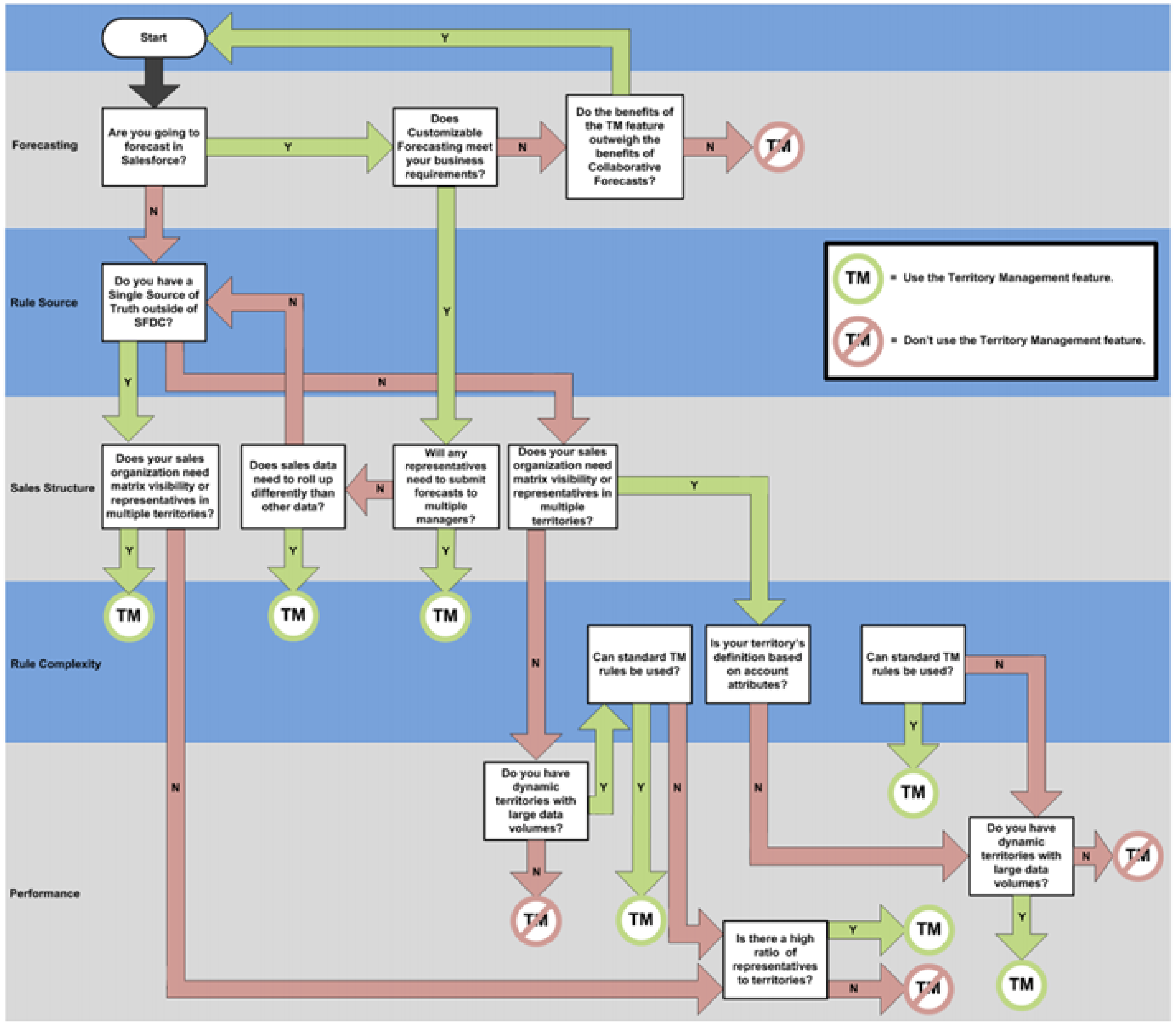
Yes. The territory hierarchy and the role hierarchy are independent. See the following comparison:

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

Territory Related Lists

Each territory detail page has the following related lists:

- **Assigned Users**– Lists the users in the territory.
- **Inherited Account Assignment Rules**– Lists the account assignment rules for this territory that are defined in a parent territory.
- **Account Assignment Rules Defined in This Territory**– Lists the account assignment rules for this territory.
- **Manually Assigned Accounts**– Lists the accounts that have been manually added to this territory.
- **Child Territories**– Lists the territories located immediately below this territory in the territory hierarchy. Click **Add Territory** to create a new child territory for this territory. Click a child territory name to view that territory's detail page.



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

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

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

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

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

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

How are opportunities assigned to territories?

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

- **Creating a new opportunity**

Opportunities that you create are automatically assigned a territory when you meet both of the following conditions:

- You belong to or have edit privileges on the same territory as the account on the opportunity.
- You have no other territories in common with that account.

For example, if you are in the territories Berkeley and San Francisco and the account is in the territories Portland, San Francisco, and Seattle, the opportunity will be assigned to the San Francisco territory.

- **Running account assignment rules**

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

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

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

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

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

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