

Territory Management in Salesforce Sales Cloud

On May 15, 2020, Posted by [AwsQuality](#), In [Sales cloud](#)



of the persons among us who are technical savvy use some kind of CRM (Customer Relationship Management) system to manage daily activities such as sales, sales forecasts, regression with different data of the ner, and territory management in regard to the geographical location of the customer or consumer, etc.

the past technologies, it's difficult to manage the territory for the customers in different kinds of CRM, here we have a **Territory Management System** in Salesforce.

ory Management in Salesforce is a feature of a Sales Cloud that helps reps (representatives) to access the accounts based on criteria such as postal code, industry, revenue, or a custom field.

is you to organize groups of accounts and the sales reps who work with those accounts based on territory. It grants access to accounts based on the characteristics of the accounts. When you configure territory settings, isers that come under the configured territory can be granted read, read/write, or owner-like access to the accounts in that territory.

Also check: [Lead Management in Salesforce Sales Cloud](#)

Why Implement it?

In order to attract more new leads isn't always a good thing. And it is all about quality over quantity of leads. And you have to invest more time in attracting qualified leads. It doesn't make sense for sales reps to spend more time talking to someone where sales of products or services are difficult (particularly territory based). Therefore territory management makes tasks simple for reps to focus based on the specified territory so that maximum leads or prospects can be converted to an opportunity.

Benefits of Territory Management

- Help companies to structure Salesforce data and users in the same way as you design your sales territories.
- With sales territories, it's easy to keep track of which reps (representative) are assigned to which accounts and opportunities.
- It helps to allocate resources efficiently, so you're more likely to maximize sales and profits.
- Sales forecasts based on territory makes it simple.
- Assignments made between territories, accounts, and opportunities get easy.
- Support for transferring users between territories in order to retain opportunities.

Here we will discuss the steps to set up territory management....

- Enter Territory in the Quick Find box from the Setup menu.
- Select Territory Settings.

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup" (highlighted with a red box), "Home", and "Object Manager". On the left side, there is a "Quick Find" box containing the text "Territory" (highlighted with a red box). Below the search bar, the navigation menu is expanded, showing "Data", "Feature Settings", "Sales", and "Territories". Under "Territories", "Territory Settings" is highlighted with a red box. The main content area displays the "SETUP Home" page with three featured cards: "Mobile Publisher", "Real-time Collaborative Docs", and "Join the Trailblazer Community". Each card has a description and a button to learn more or get started. The "Territory Settings" link in the left navigation menu is the target of the instructions.

If you can't find what you're looking for?
Using Global Search.

Click Enable Enterprise Territory Management.



SETUP

Territory Settings

Enterprise Territory Management allows you to organize your sales structure into separate territories, based on geographic attributes, named accounts, industry/verticals, or any other criteria that suits your organization. You can experiment with different territory models and activate the one that works best for your sales teams.

Deploying Territory Management includes these steps:

1. Build your territory hierarchy.
2. Assign users to territories and create rules for account assignment.
3. Preview your account assignments.
4. Activate your territory model.

Enable Enterprise Territory Management

You will see a success message on the screen as shown in the below image.

Settings

Help for this Page ?

Success

Enterprise Territory Management has been successfully enabled for your organization. From this settings page you can configure access rules for accounts and opportunities associated with territories.

Default Access Levels

Account Access

Users in a territory can:

- ☒ **View** and **edit** accounts assigned to the territory
- ☐ **View**, **edit**, **transfer**, and **delete** accounts assigned to the territory

Opportunity Territory Assignment

Click [Save](#) to accept the default selection as View and edit accounts assigned to the territory.

Here you can see that the feature is on and the user access levels are set.

Opportunity Territory Assignment

Assignment Filter

☐ Enable Filter-Based Opportunity Territory Assignment

Apex Class Name:

☐ Run filter-based opportunity territory assignment job when opportunities are created

[Disable Enterprise Territory Management](#)

Cancel

Save

Creation of territory type

- Enter [Territory](#) in the Quick Find box from the Setup menu.
- Select [Territory Types](#).

Setup Home Object Manager

Search Setup

Territory

Data

State and Country/Territory Picklists

Feature Settings

Sales

Territories

Territory Models

Territory Settings

Territory Types

SETUP Territory Types

All Territory Types

View: All Territory Types Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Label ↑	Description	Priority
No records to display.		

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

- Click on New Territory Type.
- In the label, enter Test Accounts (can be given any name).
- In the description, you can give any description related to it.
- You can specify the priority of 100 so there's a chance to add priorities above and below this one.
- Click on Save.

Territory Type

SETUP Territory Types

Territory Type

New Territory Type

Territory Type Edit

Save Save & New Cancel

Information

Label Test Accounts

Description

Territory Type Name Test_Accounts

Priority 100


Learn More








Save Save & New Cancel


Creation of Territory Model Records: Your territory model record connects your territories, user assignments, and account assignments. When you create the record then Salesforce creates a territory hierarchy based upon it. Now you have access to the territory hierarchy to complete most of the territory management tasks. Here are the steps to create it....

- Enter Territory in the Quick Find box from the Setup menu.

- Select Territory Models.
- Click on New Territory Model.





Setup

Home

Object Manager ▾

▼ Data

State and Country/Territory Picklists

▼ Feature Settings


▼ Sales

▼ Territories

Territory Models

Territory Settings

Territory Types

SETUP

Territory Models

Territory Models

Help for this Page ?

View: All ▼ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

New Territory Model

Label ↑	Description	Activated Date	Deactivated Date	State
No records to display.				

- or the label, enter the Current Financial Year (give any name).
- or the description, enter Territory modal for the Current Financial Year.
- Click on Save.



Search Setup



Setup

Home

Object Manager

Quick Find

Setup Home

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

ADMINISTRATION

> Users

Data

mail

FORM TOOLS

Enter Territory in the Quick Find box from the Setup menu.

Select Territory Models.

Click on View Hierarchy.



SETUP

Territory Models

Territory Model

Current Financial Year

[Help for this Page](#)

Territory Model Edit

Save

Save & New

Cancel

Information

! = Required Information

Label **!** Current Financial Year

Territory Model Name **!** Current_Financial_Year

Description Territory modal for Current Financial Year.

State Active

Save

Save & New

Cancel

Create a Territory

Setup Home Object Manager

Search Setup

Territory

Data

State and Country/Territory Picklists

Feature Settings

Sales

Territories

Territory Models

Territory Settings

Territory Types

Territory Models

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Territory Model

Action	Label ↑	Description	Activated Date	Deactivated Date	State
Edit Del View Hierarchy View Rules	Current Financial Year	Territory modal for Current Financial Year.			Planning

next to the Current Financial Year, click on [Create Territory](#).

Setup Home Object Manager

Search Setup

Territory

Data

State and Country/Territory Picklists

Feature Settings

Sales

Territories

Territory Models

Territory Settings

Territory Types

Current Financial Year Territory Hierarchy (Planning)

« Back to List: Territory Models

Run Assignment Rules Activate Tree View

Collapse All Expand All

[-] **Current Financial Year** (Planning) **[Create Territory](#)**

- On the New Territory page, for the label, enter North New York and select the Test Accounts territory type.
- For the description, enter Accounts in North New York.
- Click on [Save](#).



Territory Edit
New Territory


[Help for this Page](#) ?

Territory Edit

Information

■ = Required Information

Label
 Territory Type 
 Parent Territory 
 Description

Territory Name 
 Territory Model

Territory Access Levels

Account Access Level ☒ Users in this territory can **view** and **edit** accounts assigned to this territory.
☐ Users in this territory can **view**, **edit**, **transfer**, and **delete** accounts assigned to this territory.

th New York territory, you need to assign accounts to it. Follows these steps to create and run an assignment rule that speeds up the process for you.

1. In the Assignment Rules Assigned to This Territory related list, click on [New](#).

2. In the rule edit page, for the rule's name, enter North New York Zip Code.

3. For the selection criteria, enter Account: Billing State/Province equals to NY.

4. You can set any other criteria also. It depends on the requirement.



SETUP

Territory Models

Territory Access Levels

Account Access Level Users in this territory can **view** and **edit** accounts assigned to this territory.



Assigned Users

[Manage Users](#)

No records to display



Manually Assigned Accounts

[Add Accounts](#)

No records to display

Inherited Assignment Rules

No records to display

Assignment Rules Assigned to This Territory

[New](#)[Run Rules](#)[Assign Rules](#)

records to display

Click on [Save](#).



SETUP

Territory Models

Object Territory Assignment Rule Edit

Step 1: Enter the name of this rule

! = Required Information

Rule Name **North New York Billing State**

Unique Name **North_New_York_Billing_Sta** [i](#)

Step 2: Enter the selection criteria for this rule

Base your rule on object characteristics such as:

- Industry
- Annual revenue
- Number of employees
- Region

Field	Operator	Value	
Account: Billing State/Province	equals	NY	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

- In the Assignment Rules Assigned to this territory related list, click on [Run Rules](#).

SETUP

Territory Models

Assigned Users

manage Users

No records to display

Manually Assigned Accounts

Add Accounts

No records to display

Inherited Assignment Rules

No records to display

Assignment Rules Assigned to This Territory

NewRun RulesAssign Rules

Action

Rule Name

Apply to Child Territories

Modified Date

Edit | Remove

North New York Billing State/Province

North New York Billing State/Province Details

Rule Criteria

Account: Billing State/Province equals NY

☐

4/24/2020, 6:25 PM

Child Territories

- You will see the details like in the image below.

SETUP

Territory Models

North New York

Help for this Page

Running Rules

Assignment rules are currently running; you will be notified via e-mail once the rules have finished.

Assigned Users (0)

Manually Assigned Accounts (0)

Inherited Assignment Rules (0)

Assignment Rules Assigned to This Territory (1)

Child Territories (0)

Territory Detail

Edit

Delete

Clone

View Accounts

Label	North New York	Territory Name	North_New_York
Territory Type	TestAccounts	Territory Model	Current Financial Year
Parent Territory	(Current Financial Year)	Forecast Manager	
Description	Accounts in North New York		

- You will get an email about the confirmation of the rule that successfully ran.

Assign an Account to a Territory Manually

- In the Manually Assigned Accounts related list, click on Add Accounts.



SETUP

Territory Models

▼ Territory Access Levels

Account Access Level Users in this territory can **view** and **edit** accounts assigned to this territory.



Assigned Users

Manage Users

No records to display



Manually Assigned Accounts

Add Accounts

No records to display

Inherited Assignment Rules

No records to display

Assignment Rules Assigned to This Territory

New

Run Rules

Assign Rules

ion

Rule Name

North New York Billing State/Province
Details

Apply to Child Territories

Modified Date

t | [Remove](#) [North New York Billing State/Province](#)

Rule Criteria



4/24/2020, 6:25 PM

elect any Account of your choice.

lick on the [Assign](#) button.



SETUP

Territory Models

<input type="checkbox"/>	Edge Communications	TX	(512) 764-8820	Customer - Direct	ATech
<input type="checkbox"/>	Express Logistics and Transport	OR	(503) 421-7800	Customer - Channel	ATech
<input type="checkbox"/>	GenePoint	CA	(650) 867-3450	Customer - Channel	ATech
<input type="checkbox"/>	Grand Hotels & Resorts Ltd	IL	(312) 596-1000	Customer - Direct	ATech
<input type="checkbox"/>	Pyramid Construction Inc.		(014) 427-4427	Customer - Channel	ATech
<input type="checkbox"/>	record1		+918076488920		ATech
<input type="checkbox"/>	sForce	CA	(415) 901-7000		ATech
<input checked="" type="checkbox"/>	TestCompany	NY	1234567890		ATech
<input type="checkbox"/>	TestSMS		(901) 525-2929		ATech
<input type="checkbox"/>	United Oil & Gas Corp.	NY	(212) 842-5500	Customer - Direct	ATech

Show me [fewer](#) ▲ / ▼ [more](#) records per list page

Selected

Account Name
TestCompany

Assign Cancel

Assign an Assignment Rule to a Territory

In the Assignment Rules Assigned to This Territory related list, click on [Assign Rules](#).
Select the rule and click on the [Assign](#) button.



SETUP

Territory Models

▼ System Information

Last Modified By [AwsQuality Technologies](#), 4/24/2020, 6:06 PM

Last Modified Date 4/24/2020, 6:06 PM

▼ Territory Access Levels

Account Access Level Users in this territory can **view** and **edit** accounts assigned to this territory.

Assigned Users

[Manage Users](#)

No records to display



Manually Assigned Accounts

[Add Accounts](#)

Action	Account Name
Remove	TestCompany.

Inherited Assignment Rules

No records to display

Assignment Rules Assigned to This Territory

[New](#)[Run Rules](#)[Assign Rules](#)In the Assigned Users related list, click on [Manage Users](#).

Assign a User to a Territory



SETUP

Territory Models

[Assigned Users \(0\)](#) | [Manually Assigned Accounts \(1\)](#) | [Inherited Assignment Rules \(0\)](#) | [Assignment Rules Assigned to This Territory \(1\)](#) | [Child Territories \(0\)](#)

Territory Detail

[Edit](#)[Delete](#)[Clone](#)[View Accounts](#)

Label North New York

Territory Name North_New_York

Territory Type [Test Accounts](#)Territory Model [Current Financial Year](#)

Parent Territory (Current Financial Year)

Forecast Manager

Description Accounts in North New York

▼ System Information

Last Modified By [AwsQuality Technologies](#), 4/24/2020, 6:06 PM

Last Modified Date 4/24/2020, 6:06 PM

▼ Territory Access Levels


Account Access Level Users in this territory can **view** and **edit** accounts assigned to this territory.

Assigned Users


[Manage Users](#)

No records to display

- You select the user from the left column named Available Users and click on Add in order to add users in the Selected Users column.
- Click on the Save button.

 SETUP

Search to find users you would like to add to this territory. Select names from the Available Users list and then click Add. When you are done, click Save.

Search Users... 

Available Users

AwsQuality Technologies (abhishek.anand@awsq

Add

Remove

Selected Users

Save Cancel

Now click on the territory model and click on the Activate button in order to activate the territory.



Search Setup



Setup

Home

Object Manager

terri

Data

State and Country/Territory
Picklists

Feature Settings

Sales

Territories

Territory Models

Territory Settings

Territory Types

Can't find what you're looking for?
Using Global Search.



SETUP

Territory Models

Territory Model

Current Financial Year

[« Back to List: Territory Models](#)

[Help for this Page](#)

Territory Model Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#) [View Hierarchy](#) [View Rules](#)

Information


Label	Current Financial Year	Territory Model Name	Current_Financial_Year
Description	Territory modal for Current Financial Year.	State	Planning
Activated Date		Deactivated Date	
Last successful model realign date		Clone source	
Last successful opportunity territory assignment date			

System Information

Last Modified By [AwsQuality Technologies](#), 4/24/2020, 6:26 PM

Last Modified Date 4/24/2020, 6:26 PM

After clicking on the [Activate](#) button, you will see a message on the screen. It is shown in the below image.



Search Setup


★

+

?

⚙

🔔



Setup

Home

Object Manager

Q terri

▼ Data

State and Country/Territory Picklists

▼ Feature Settings

▼ Sales

▼ Territories

Territory Models

Territory Settings

Territory Types

SETUP

Territory Models

[« Back to List: Territory Models](#)

Territory Model Activation in Progress

Activation is in progress for territory model **Current Financial Year**. The process may take several hours. We'll send you an email when it's done.

Territory Model Detail

EditDeleteCloneActivateView HierarchyView Rules


▼ Information

Label	Current Financial Year	Territory Model Name	Current_Financial_Year
Description	Territory modal for Current Financial Year.	State	Planning
Activated Date		Deactivated Date	
Last successful model realign date		Clone source	<input type="checkbox"/>
Last successful opportunity territory assignment date			

▼ System Information

Last Modified By	AwsQuality Technologies , 4/24/2020, 6:26 PM	Last Modified Date	4/24/2020, 6:26 PM
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- You just go to the particular account to whom you assigned the territory and user.
- If in the related list, these two are not present then set the page layout of Account.
 - Now you can see the details as shown in the image below.



All ▾

Search Accounts and more...


★ ▾

+



?

⚙

🔔



SalesHomeOpportunities ▾Leads ▾Tasks ▾Files ▾Accounts ▾Contacts ▾Campaigns ▾Dashboards ▾Reports ▾ChatterGroups ▾Calendar ▾More ▾✎

Account
TestCompany 

+ Follow

Send SMS



New Contact

New Case ▾

Type

Phone
1234567890


Website


Account Owner
 [AwsQuality Technologi...](#) 

Account Site

Industry

RelatedDetailsNews


 We found no potential duplicates of this account.


 **Assigned Territories (1)**

[Assign Territories](#)

Territory	Territory Model	Model State	Assignment Date
North New York	Current Financial Year	Active	4/24/2020, 6:26 PM ▾

[View All](#)

 **Users in Assigned Territories (1)**

Full Name	Email	Role In Territory	Territory Name	Territory Model
 AwsQuality Tech	[REDACTED]		North New York	Current Financial Year

ActivityChatter

New Task

Log a CallNew EventEmail

Create a task...

Add

Filters: All time • All activities • All types ▾

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Conclusion

Organizations are adopting territory management features in order to structure Salesforce data and users in the same way as you design your sales territories. With sales territories, it's easy to keep track of which reps (representative) are assigned to which accounts and opportunities. Hence it helps to optimize the business process and increases the productivity of an organization.