Glossary

Commonly used terms in T&Q are described below:

Term	Definition
Account	Account or customer of the business.
Account Classification Rule	Rule used to classify each account to a classifier, based on an attribute on the Account and Classifier.
Account Hierarchy	Accounts with a parent-child relationship with other Accounts.
Allocation Target	The target amount that will be allocated to sub territories. This can differ from the Assigned Target when an uplift is applied (Top Down Programs), or if a quota relief factor is used (Bottom-up Programs).
Assigned Targets	The quota that has been assigned to a specific roll-up territory.

Attrition Relief	This is applicable to Bottom-Up Territory Programs. This value is expressed as a percentage. It is applied to the result of the baseline + growth rate and is used to indicate the expected relief of the calculated quota based on the expected/planned business loss. This value would be 0% or more. For example, a 2% attrition relief applied to a $100,000 baseline and a 10% growth rate would equate to a resulting target/quota of $107,800 or a $100,000 baseline + 10% expected growth = $110,000 minus the 2% / $2,200 (2% of $110,000) = $107,800.
Bottom-Up Program	A Territory Program that assumes quota targets for each territory are derived based primarily on the historical performance of any and all sub territories. This Territory Program model is particularly effective for sales organizations that assign quota targets based primarily on growth.
Classifier-Based Territory Rule	Territory Rule used to filter accounts by matching the attribute value in the Account with the value in the Account Classifier, specified by the Account Classification rule. This rule selects the Account based on the Classifier Hierarchy so all Accounts classified in the subtree of the Classifier are included.
Calculated Quota	In Top-Down Programs, this is the recommended quota value for a given target. It is calculated by applying the program defaults for growth over a given baseline period to the historical performance of that territory.
Custom Attribute Territory Rule	Territory rule used to filter Accounts by matching the custom attribute value of the Account with the specified value. This rule specifies which value of a custom attribute is used to select accounts for the territory.
Current Value	The Quota value that is assigned to a given territory or sub territory.
Explicit Territory	Territory with Accounts assigned explicitly by the user, or sales representative.

Distribution Method	For Top Down Territory Programs, this algorithm can be used to allocate a given target value to the associated sub-territories. The allocation can be done evenly, based on historical or opportunity data, or a via a weighted combination of all of the above.
Historical Performance	A territory by territory breakdown of applicable transactions over a period of time. Transactions are applicable to a given territory if they match the account and product definitions of that Territory. Historical performance can be visualized in the Territory Detail page, as well as the Quota Allocation page. Historical performance is used by Bottom-up Territory programs to determine quota values based on growth, and can also be used in Top-Down Territory programs to allocate quotas fairly.
Implicit Territory	Territory with Accounts assigned implicitly by the account allocation process using the territory rule.
Leaf Implicit Territory	Territory with only explicit territory children.
Leaf Territory	A territory that has no sub-territories. Typically a leaf target is assigned to an individual Sales Representative, although Sales managers may also be responsible for a leaf territory.
Locked Value	Locked quota values are pending quotas that have been locked by a manager. Locked quotas are not adjusted when using distribution methods to allocate or reallocate quotas.
Opportunity	Displays the value of the opportunity pipeline for a given territory based on opportunity data from a CRM. Opportunity data can be visualized in the Territory Detail page and in the Quota Allocation page. Top-Down Territory Programs can use Opportunity data to allocate quota targets fairly based on the value of future opportunities.

Quota Distribution	The workflow governing the dissemination of quotas for a given territory to the users who are assigned to those territories. When quota distribution occurs, workflow sends notifications to respective territory users.
Quota reduction Factor in Bottom-Up	This value is expressed as a percentage. It reflects the reduction in the roll-ups of quotas as they are aggregated from subordinate territories. This allows a manager to have some relief if all subordinate territories did not perform at goal. This value should allow 0% and greater values.
Root Territory	Territory at the root of the Territory Hierarchy. The root territory does not usually have a Territory Rule and instead passes all the accounts to the child territory during the account allocation process.
Roll-up Territory	A territory that has one or more sub-territories. These are generally assigned to sales managers. Any territory which has subordinate territories is called as Roll Up Territory, even if it is Top-down or Bottom-up.
Pending Value	The proposed quota value for a given territory. Managers assigned to roll-up territories can change the pending value for any sub-territory by using a distribution algorithm (for Top-Down Programs), changing growth parameters (for Bottom-Up Territories), or by manually entering a value.
Positions	Positions define specific, unique jobs that participants perform in each specific area of the company. There is a unique position for each participant. Each position in Commissions is grouped under a job title. The positions created in Commissions typically mirror the positions on your organization chart and reflects subordinate and management positions. As your company grows, you can create new positions and modify existing positions as job responsibilities in your company evolve.

Status	The workflow state for a specific target and program.
Sub Territory Targets	For roll-up territories, this represents the allocation of the manager's target to each sub territory. The sum of all sub territory targets should match the assigned target for the roll-up territory.
Targets	A goal that has an assigned quota value. Territory Programs can include multiple Targets. When multiple Targets are available, a drop-down allows you to view quota information for the specified Targets. Examples of targets may include New Bookings, Revenue, New Customer Logos, etc.
Territory Rule	Rules that determine which accounts will be allocated to which territory.