



# Territory Management

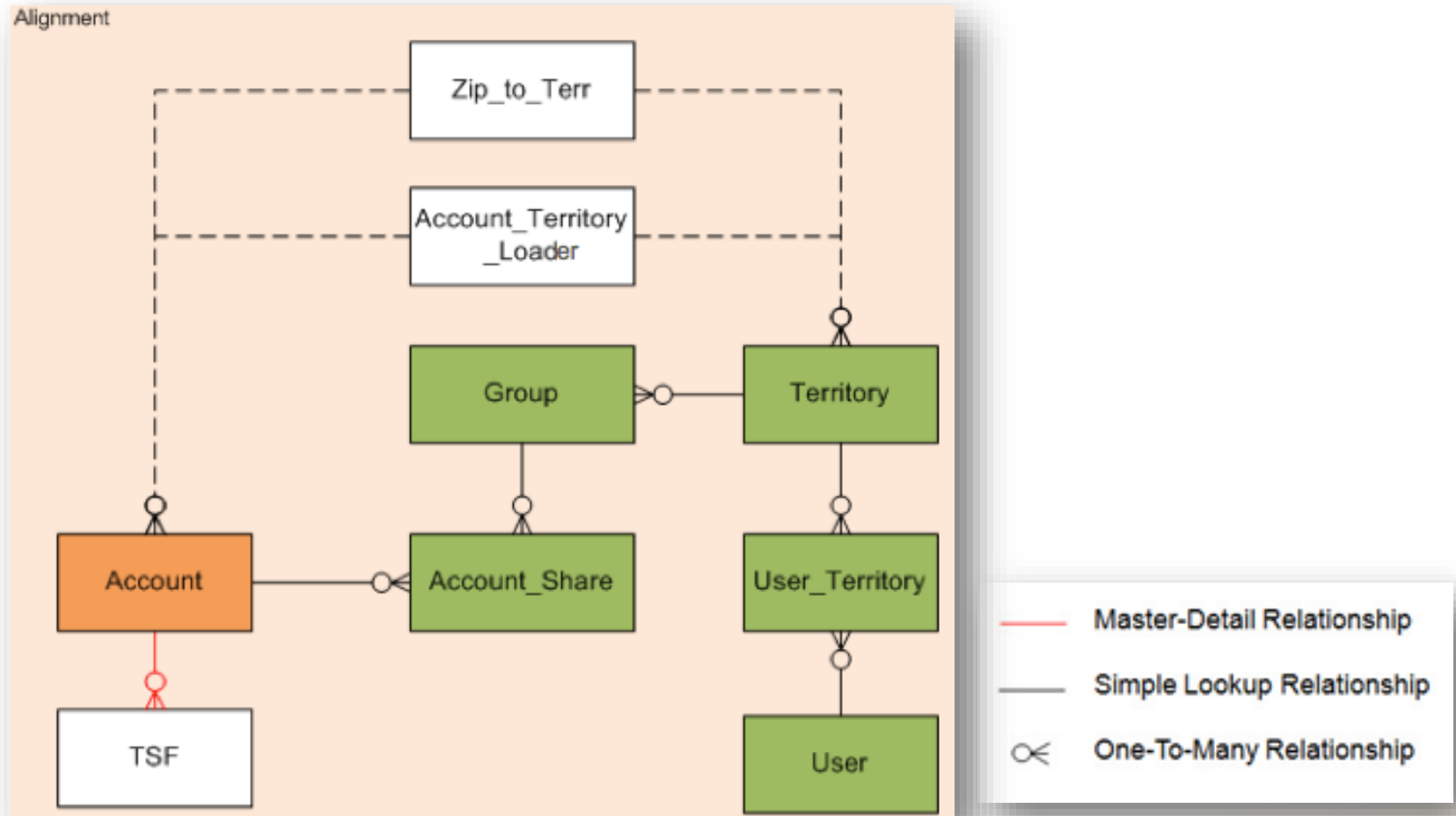
Veeva Professional Services

# Module Objectives

- **Define Territory Management**
- **Define and use Account Territory Loader**
- **Define and use Zip-to-Terr**
- **Define and use Brick-to-Terr**
- **Discuss Archiving Accounts**



# Veeva Data Model – Account Visibility/Territory Alignment



# Territory Hierarchy

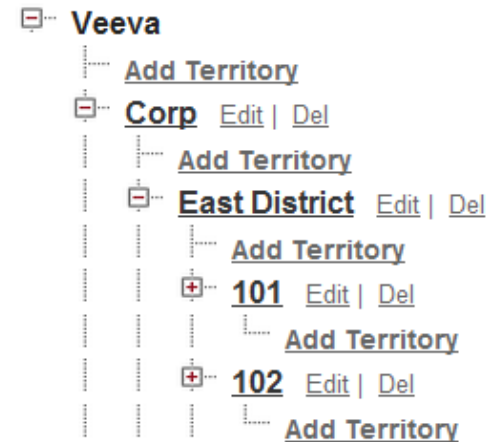
- Controls visibility to accounts through a hierarchical structure
  - Gives reps access to their accounts
- Users assigned to a node can view accounts assigned to nodes below in the hierarchy
- Navigate to a territory record to:
  - View a list of accounts for that territory
  - Add or remove an account from that territory
  - Create a child territory
  - Edit or delete the territory

## Administration Setup

- ⊕ Manage Users
- ⊖ Manage Territories
  - Settings
  - Hierarchy

## Your Organization's Territory Hierarchy

[Collapse All](#) [Expand All](#)

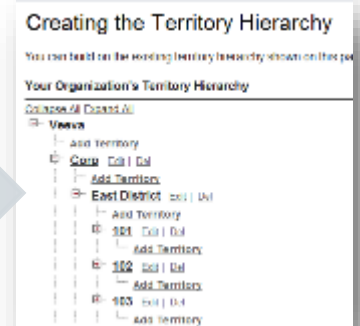


# Creating Territories

- Territories can be built through:

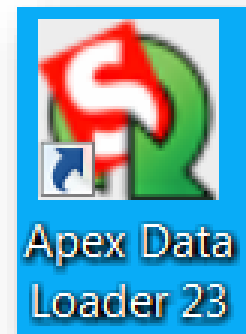
## User Interface

- Provides a visual representation of the hierarchy and often makes building territories easier



## Apex Data Loader

- Import to the Territory object
- Change Account Access Level to View/Edit



# Create Territory Management Application

- **It is helpful to build a territory management application**
  - Setup → Create → Apps
- **Make visible only to System Administrator and Territory Administrator profiles**
- **Tabs to include:**
  - My Accounts
  - Territory Utilities
  - My Setup
  - Veeva (VoD) Messages
  - Account Territory Loader (if using ATL)
  - Zip to Terrs (if using Zip-to-Terr)
  - Brick Hierarchy (if using Brick-to-Terr)
  - Brick to Terrs (if using Brick-to-Terr)



# ATL vs. Zip-to-Terr

## Account Territory Loader

- Number of accounts exceeds ~1 Million
- The alignment needs to go to many different systems
  - Data Warehouses, Marketing Automation, Incentive Comp, etc.
- Complicated alignment rules
- Alignment is done externally and fed into various systems including Veeva

## Zip-to-Terr (Brick-to-Terr)

- Number of accounts less than ~1 Million
- The alignment is mainly for the Veeva system as it stands
  - Rules only span Veeva Account table
- Uncomplicated alignment rules
- Alignment is done inside Veeva



# Account Territory Loader



# Veeva's Account Territory Loader (ATL)

- Account Territory Loader is an object used to perform assignments of account to territories via a data load
- ATL will insert/update records in the SFDC Account Share table where the alignment is actually stored
- Inserting a row into Account Territory Loader table performs up to two operations in the Account Share table:
  - Removes the current territory assignment for the associated Account
  - Assigns the Account to the specified list of territories explicitly

<b>Account Detail</b>		<a href="#">Edit</a>		<a href="#">Record a Call</a>		<a href="#">Account Summary</a>		<a href="#">Calendar</a>		<a href="#">View Hierarchy</a>	
Name	Dr. Melany Segnit			Primary Parent							
Middle				Credentials		MD					
Suffix				Specialty		Family Medicine					
Preferred Name				Specialty 2							
Gender	F			Territories		102, MSL, 103, 101					

**Territories** field on the Account page will be populated

# Veeva's Account Territory Loader (ATL)

- **Recommended for implementations with 1M+ accounts**
  - Processes faster than zip-to-terr alignment
- **Use Apex Data Loader or another data loading tool**
  - Create an ATL file with the SFDC Account ID and the territory(ies) to which the account should be assigned
  - Upsert the ATL file into the Account Territory Loader object

Account_vod__c	EXTERNAL_ID_VOD__C	Territory_vod__c
001A000000cxo27IAA	001A000000cxo27IAA	;1002A;2002A;3002A;
001A000000cxo26IAA	001A000000cxo26IAA	;1002A;2002A;3002A;
001A000000cxo21IAA	001A000000cxo21IAA	;1002A;
001A000000cxo25IAA	001A000000cxo25IAA	;1002A;
001A000000cxo28IAA	001A000000cxo28IAA	;1002A;
001A000000cxo29IAA	001A000000cxo29IAA	;1002A;
001A000000cxo2AIAQ	001A000000cxo2AIAQ	;1002A;2002A;3002A;
001A000000cxo2BIAQ	001A000000cxo2BIAQ	;1002A;2002A;3002A;



# ATL File

## Account\_vod\_\_c

- This is a lookup to the Account object
- Contains the SFDC Id for the account

## External\_ID\_vod\_\_c

- The external ID for upserting into the ATL object after the initial load
- Best Practice: use the Account SFDC Id

## Territory\_vod\_\_c

- Stores the territories associated with this account in a semicolon separated format
- Salesforce.com territory rules later run on this field to assign territories
- A leading and trailing semicolon must be contained within this field
- ;LA123;NYC321;US3244;



# ATL File (Continued)

## Territory\_to\_Add\_vod\_\_c

- Contains a semicolon delimited list of territory names
- Used to assign one or more territories to the account for incremental alignments
- If values are listed, territory names will be added to the Territory\_vod field

## Territory\_to\_Drop\_vod\_\_c

- Contains a semicolon delimited list of territory names
- Used to remove one or more territories from the account for incremental alignments
- If values are listed, territory names will be removed from the Territory\_vod field



# ATL Steps

## Territory Hierarchy

- Load Territory object with the correct territory hierarchy information

## Accounts

- Load Accounts into the Account object

## Account SFDC

- Extract the Account SFDC ID from Account object using Data Loader

## ATL Field Names

- Extract the Account Territory Loader object to obtain the field names for import

## ATL

- Import the ATL file into the ATL object with the Account\_vod\_\_c, External\_Id\_vod\_\_c, and Territory\_vod\_\_c columns populated



# ATL Best Practice

- **There should only be one ATL record for each account**
- **For subsequent incremental or full alignments, perform an upsert on the ATL object and match on the External ID**
  - Incremental alignments can utilize the Territory to Add and Territory to Drop fields to simplify single add and removal operations
- **When upserting a record into the ATL object:**
  - Checks Territory to Add and Territory to Drop fields and updates the Account Share table accordingly
  - Clears the Account Share records that correspond to the current Territory assignment
  - Assigns account(s) to specified territories



# Zip-to-Terr



# Zip-to-Terr

- **Organizations often align Accounts to users based on geography e.g., zip code**
- **One Account can have n-number of addresses**
- **Zip code is an attribute of the Address object**
  - Standard Force.com territory assignment rules are not able to check attributes of the address to make the assignment
- **Veeva created a territory assignment utility**
  - Checks the zip codes of addresses, finds a list of territories for zip codes in the Zip-to-Terr table, and populates the Territory\_vod field on the Accounts with one or more territories each account should be aligned to





# Zip-to-Terr Steps

1. Upload Zip-to-Terr file
2. Rebuild vod Territory rules
3. Run test assignment
4. Run reports on the alignment
5. Run mass assignment
6. Run Assignment Rules in Territory Hierarchy
7. Use Manual Overrides until next realignment



# 1. Upload Zip-to-Terr File

Zip-to-Terr object only needs three columns:

- **NAME** – the actual zip code value
- **TERRITORY\_VOD\_\_C** – list of territories separated by semicolon – only allows 255 characters including semicolons
- **ZIP\_ID\_VOD\_\_C** – a unique value for each record; should be the same as NAME

Zip codes that start with a 0 should have a ' as a prefix

	A	B	C	
1	NAME	TERRITORY_VOD__C	ZIP_ID_VOD__C	
2	06802	;102;103;	06802	
3	07078	;102;103;	07078	
4	07424	;102;103;	07424	
5	07444	;102;103;	07444	
6	07470	;102;103;	07470	
7	07840	;102;103;	07840	
8	07000	;102;103;	07000	
9	07860	;102;103;	07860	
10	08036	;102;103;	08036	
11	08050	;102;103;	08050	
12	08514	;102;103;	08514	
13	09007	;102;103;	09007	



## 2. Rebuilt vod Territory Rules

- Go to Setup → Territory Utilities

**Rebuild VoD Territory rules**

This utility will rebuild all standard VoD territory rules in the format of:  
**VT-Rule13003 = "Territory VoD contains ;13003;"**  
Run this utility when you have added new territory nodes in [Salesforce.com territory management](#).

Rebuild VoD territory rules	Timestamp		Rows Processed
	11/20/2012 2:22 PM	Finished	22

- Use Territory Utilities to generate or update territory rules

- No need to manually create the rules when new territories are created or upserted

- Go to Setup → Manage Territories → Hierarchy

- Generated rules are added for each territory

**Rule Details**

Rule Name: VT-Rule101

Apply to child territories: ☐

Active: ☒

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**Rule Criteria**

Account: Territory VoD CONTAINS ;101;



# 3. Run Test Assignment

- Test the territory assignment first in Territory Utilities tab to determine if territories will map correctly prior to finalizing territory assignments

Click **Test Territory Assignment** to populate the Territory Test VoD field on the Account

**Test mass assign Territories for all Accounts**

This utility will update the "Territory TEST VoD" field on all accounts according to your zip-terr mapping.

Select Territories


Corp, EMEA

<b>Test territory assignment</b>	<b>Action</b>	<b>Run Id</b>	<b>Territories</b>	<b>Timestamp</b>
	<a href="#">Continue Redo</a>	R012	Corp, EMEA	11/5/2013 6:12 AM
	<a href="#">Download Log</a>			

# 4. Run Reports on the Alignment

- Create a custom report to make sure accounts and zip codes have been assigned the proper territory in the Territory Test VoD field

[Home](#) [My Accounts](#) [Brick Hierarchy](#) [Brick to Terrs](#) [Zip to Terrs](#) [Account Territory Loaders](#) [My Setup](#) [Territory Utilities](#) [VoD Messa](#)

 **Account Territory Alignment**

Report Generation Status: Complete

Report Options:

Summarize information by: 

--None--

 Show 

All accounts

 Territories 

All

Time Frame

Date Field 

Last Activity

 Range 

Custom

From

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Add to Campaign

Account Owner	Name	Zip	Territory VoD	Territory Test VoD	Address: Street Address
<a href="#">Admin Student2</a>	<a href="#">Jason Alexander</a>	-	-	-	<a href="#">34800 Bob Wilson Drive</a>
<a href="#">Admin Student2</a>	<a href="#">Abbeville General Hosp</a>	70510	;102;	;102;	<a href="#">Main Street 832</a>
<a href="#">Admin Student2</a>	<a href="#">Abilene Reg Med Ctr</a>	79606	;102;	;102;	<a href="#">Main Street 838</a>
<a href="#">Admin Student2</a>	<a href="#">Baylor Medical Center</a>	75042	;101;102;103;	;101;102;103;	<a href="#">Main Street 1150</a>
<a href="#">Admin Student2</a>	<a href="#">John East</a>	75042	;101;102;103;	;101;102;103;	<a href="#">West Street 3623</a>
<a href="#">Admin Student2</a>	<a href="#">Dhirenda Johnson</a>	75042	;101;102;103;	;101;102;103;	<a href="#">West Street 3624</a>
<a href="#">Admin Student2</a>	<a href="#">James Roberts</a>	75042	;101;102;103;	;101;102;103;	<a href="#">West Street 3625</a>
<a href="#">Admin Student2</a>	<a href="#">Jeffrey Johnson</a>	75042	;101;102;103;	;101;102;103;	<a href="#">West Street 3626</a>

# 5. Run Mass Assignment

- Click Run Mass Assignment if the test assignment was successful
  - Will populate the Territory VoD field on the Account
  - Max of 255 characters

## Mass assign Territories for all Accounts

This utility can be leveraged to update the "Territory VoD" field on all accounts according to your zip-terr mapping. After this process completes, you must run the [territory management](#) to make the rules effective.

Select territory nodes from which the alignment will begin. Any territories beneath the selected node in the territory hierarchy will also be aligned.

Select Territories

Corp, EMEA

Run Mass Assignment

Action	Run Id	Territories	Timestamp	Rows Processed	Errors
<a href="#">Download Log</a>	R014	Corp, EMEA	2/23/2012 4:45 PM Finished	146	0
<a href="#">Download Log</a>	R011	Corp, EMEA	1/19/2012 1:23 PM Finished	144	0
<a href="#">Download Log</a>	R007	04T400000004F17EAE-04T40000000Gn6pEAC	1/15/2012 6:58 PM Finished	12	0




# 6. Run Assignment Rules in Territory Hierarchy

- Last step to align Accounts to the Territories
- Setup → Manage Territories → Hierarchy → Click the highest territory (Corp)

**Account Assignment Rules Defined in This Territory**

Manage Rules **Run Rules**

Action	Active 	Rule Name
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Deactivate</a>	<input checked="" type="checkbox"/>	<u>VT-RuleCorp</u>

Click Run Rules

**Account Detail** [Edit](#) [Record a Call](#) [Account Summary](#) [Calendar](#) [View Hierarchy](#)

Name	Dr. Melany Segnit	Primary Parent	
Middle		Credentials	MD
Suffix		Specialty	Family Medicine
Preferred Name		Specialty 2	
Gender	F	<b>Territories</b>	102, MSL, 103, 101

Territories field on the Account page will be populated

# Territory Utilities Tab

- **Supports a wide array of alignment options**
- **Administrator can continue a failed alignment from where it failed or restart from the beginning**

Select Territories

Corp, EMEA

Select the picklist values to add below

Insert Selected

**Territory**

- ☐ Corp
- ☒ East District
  - ☐ 101
  - ☐ 102
  - ☐ 103
  - ☐ 104
- ☒ Managed Markets
  - ☐ MSL
  - ☐ West District

- **Provides mini-alignments for a select portion of the territory**
  - Perform an alignment for a particular region without affecting other regions
  - Cannot be run on the lower nodes of a mini-alignment that is already running
  - Up to 5 mini-alignments can run in parallel



# Zip-to-Terr Process Alignment

- Determines which territory to assign to the Account based on the zip codes listed in the Zip-to-Terr table

**Address Detail** Edit Delete Clone

Account	Abbeville General Hosp	Primary	<input checked="" type="checkbox"/>
Street Address	Main Street 832	Inactive	<input type="checkbox"/>
City	Abbeville		
State	LA		
Zip	70510		
Country	us		
Include in Territory Assignment	<input checked="" type="checkbox"/>		

Checks Primary Address

- When this is checked the address will be included in the territory assignment process even if it is not a primary address

▼ Territory Assignment

Territory Vod	Exclude from Zip to Terr Processing	<input checked="" type="checkbox"/>
Territory Test Vod		

Accounts with this field set to True will not have its Territory\_vod field updated

# Zip-to-Terr Process Alignment

- **Process Alignment button**

- Way to assign territories based on selected zip codes
- Mostly used for newly added records
- Also used for incremental changes between major realignments
- All Tabs → Zip to Terrs → click the Go button

- **Determines which territory to assign to based on the zip code listed in the Zip-to-Terr table**

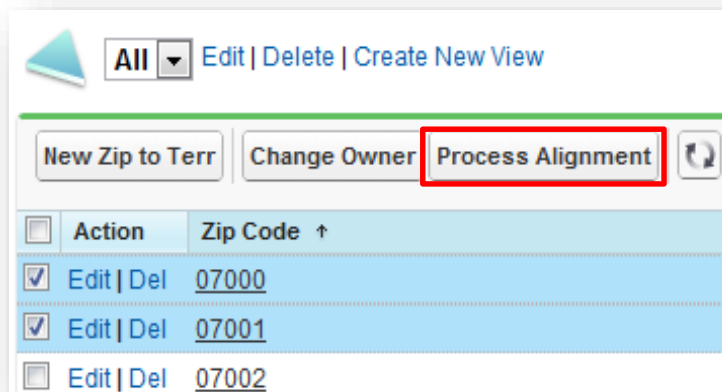
- Primary Addresses
- Addresses with Include\_In\_Territory\_Assignment\_vod set to True
- Accounts with Exclude\_from\_Zip\_to\_Terr\_Processing\_vod set to True will not have Territory\_vod field updated



# Zip-to-Terr Process Alignment

- **Process Alignment button**

- All Tabs → Zip to Terrs → click the Go button
- Works the same as the Mass Assign button on the Territory Utilities tab, except on a more granular level



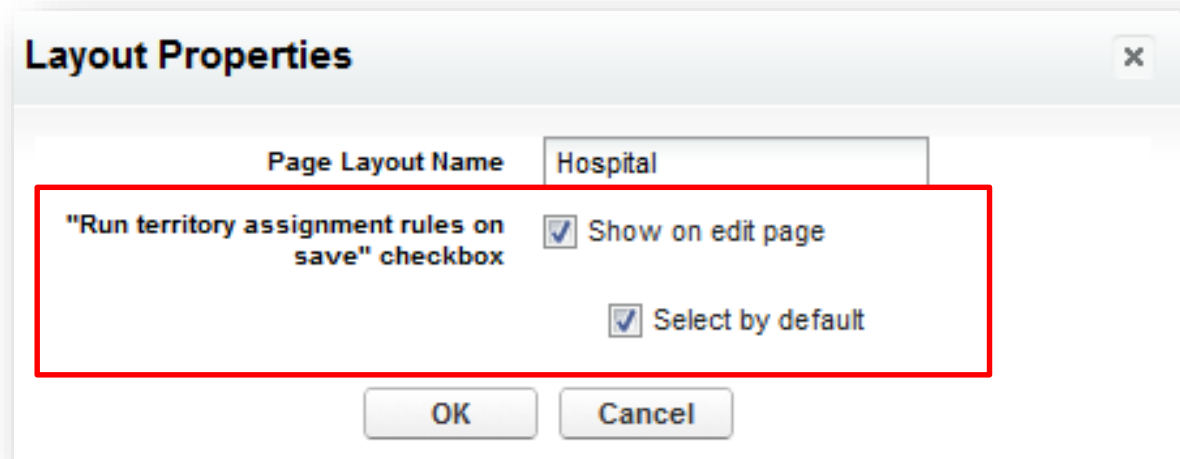
- **Add Process Alignment button on Zip-to-Terr list view**

- Setup → Create → Objects → Zip-to-Terr → Search Layouts
- User must have Edit access to Territory\_vod field on Account object



# Zip-to-Terr Process Alignment

- To enable assignment rules to run when user edits and saves an account record:
  - Under Layout Properties on each Account page layout, check both “Show on edit page” and “Select by default” checkboxes for “Run territory assignment rules on save”
  - Only applies when Account (not Address) attributes referenced in territory rules are updated



**Layout Properties**

Page Layout Name: Hospital

"Run territory assignment rules on save" checkbox

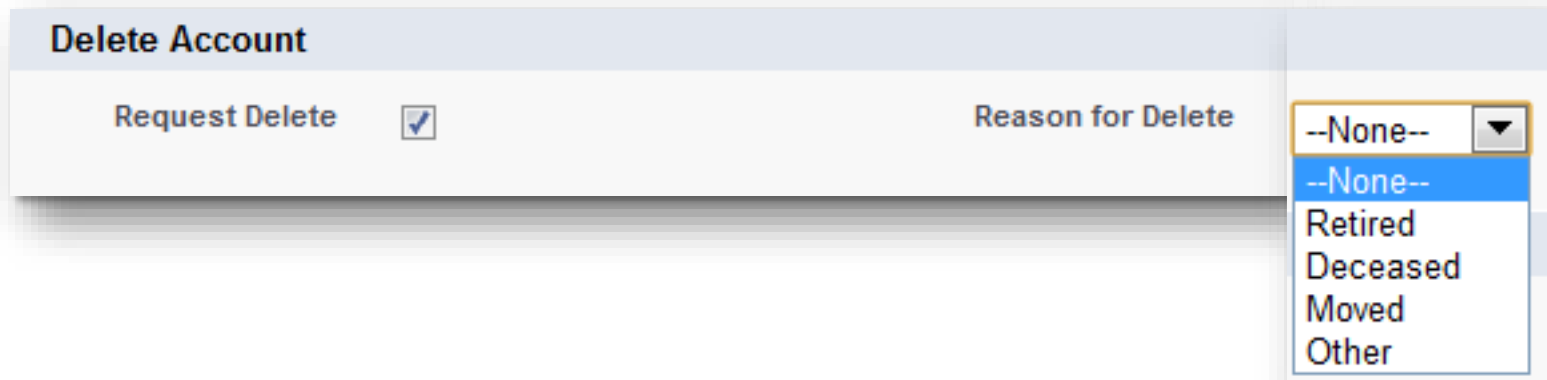
☒ Show on edit page

☒ Select by default

OK Cancel

# Retired / Deceased Accounts

- **Person account either retires or is deceased**
  - Reassign account to an "Inactive" territory
  - Preserves historical data and removes it from active territories
- **Create fields on Account object**



**Delete Account**

Request Delete ☒

Reason for Delete

--None--  
Retired  
Deceased  
Moved  
Other

- **Configure a Workflow to trigger an email for administrator to move account to the Inactive territory**

# Mixing ATL with Zip/Brick-to-Terr

- **Using both Account Territory Loader with Zip-to-Terr can be used when...**
  - Most accounts use zip-to-terr for territory assignment
  - AND
  - Some accounts (i.e., Payers) require ATL territory assignment
- Do not assign the same account using both ATL and Zip-to-Terr because duplicate records will exist in the Account Share table

Caution: Maintaining two territory management models is complex!



# Module Summary

- **Defined Territory Management**
- **Defined and used Account Territory Loader**
- **Defined and used Zip-to-Terr**
- **Defined and used Brick-to-Terr**
- **Discussed Archiving Accounts**



# Labs

For more information,  
see Appendix

Use Apex Data Loader to upload zip codes

Use Zip to Terr to perform territory alignment



# Appendix

Brick-to-Terr



# Brick-to-Terr



# Brick-to-Terr

- **Similar to Zip-to-Terr**
  - Certain countries / regions assign Accounts to territories based on a brick number stored on the Address object
  - Bricks are non-standard geographical groupings of Accounts
- **Uses Veeva's Territory Utilities to assess the Address object and populate data at the Account level**
- **One Account can have n-number of addresses**
- **Not ideal if number of accounts is greater than ~1Million**



# Brick-to-Terr

- **Brick\_to\_Terr\_vod** object stores mapping of Bricks to Territories
- **Brick\_Hierarchy\_vod** object stores relationships of bricks to one another
  - Bricks to Bricks
  - Mini-Bricks to Bricks
  - Name field = name of the Brick
  - Territory\_vod field = territory to assign Addresses to



# Brick-to-Terr

- **Territory\_vod\_\_c field only allows 255 characters (including semicolons)**
- **Territory Hierarchy must be established**
- **Add Brick\_vod\_\_c field to Address page layouts for Admins**
  - Load the Brick Name the Address is aligned to in this field



# Brick-to-Terr

- Upload Brick Hierarchy file
- Upload Brick-to-Terr file
- Create rules for the alignment
- Run test assignment
- Run reports on the alignment
- Run mass assignment
- Use Manual Overrides until next realignment

Use these VoD utilities to help administer your territories. For creating territories, changing the territory hierarchy, or assigning users to territories use the [Salesforce.com territory management](#).

## Rebuild VoD Territory rules

This utility will rebuild all standard VoD territory rules in the format of:

**VT-Rule13003 = "Territory VoD contains ;13003;"**

Run this utility when you have added new territory nodes in [Salesforce.com territory management](#).

Rebuild VoD territory rules

## Test mass assign Territories for all Accounts

This utility will update the "Territory TEST VoD" field on all accounts according to your zip-terr mapping.

Select Territories

Corp, EMEA

Test territory assignment

## Mass assign Territories for all Accounts

This utility can be leveraged to update the "Territory VoD" field on all accounts according to your zip-terr mapping. After this process completes, you must run the territory rules in [Salesforce.com territory management](#) to make the rules effective.

Select territory nodes from which the alignment will begin. Any territories beneath the selected node in the territory hierarchy will also be aligned.

Select Territories

Corp, EMEA

Run Mass Assignment



# Brick-to-Terr Process Alignment

## ■ Test Territory Assignment

- Use to determine if territories will map correctly prior to finalizing territory assignments
- Populates Territory\_Test\_vod\_\_c field on Account object
  - Maximum of 255 characters
  - Only administrators should have View access using Field Level Security

## ■ Mass Assign Territories

- Run after running Test Territory Assignment
- Populates Territory\_vod\_\_c field on account object
  - Maximum of 255 characters
  - Only administrators should have View access using Field Level Security



# Brick-to-Terr Process Alignment

- **Determining which Addresses to include in alignment:**
  - Primary Addresses are included
  - To include a non-primary Address
- **Set Include\_in\_Territory\_Assignment\_vod\_\_c field to True:**
  - To prevent an Account from being included in alignment
    - Set Exclude\_from\_Zip\_to\_Terr\_Processing\_vod\_\_c field to “True”

