NOTE: This is an on-going reference document for the Territory Management 2.0 Gap Analysis process. Please check back periodically to view the most recent updates.
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ACCOUNT PAGE LAYOUTS

Overview

Accounts are at the core of many parts of CRM, but particularly for Territory Management. Many objects in CRM reference back to accounts.

The Accounts functionality in Veeva CRM provides users with a way to view and manage both person accounts and business accounts. Person accounts are individual people, for example, an HCP, while business accounts are organizations, for example, a drugstore.

 Territories Field

The “Territories” field is an out-of-the-box Salesforce field on the Account object, displayed on the Account page layout. Online, it shows which Territories the Account is assigned to. It does not work on offline devices such as iRep.

Some customers may have exposed this field on the Account page layout. However, many customers prefer instead to expose Veeva’s “View User Territory” Custom Link. This link additionally shows the name of the User assigned to each Territory.
TM2.0 Impacts

The Salesforce field, Territories, will go away when the org is switched to Territory 2.0. This field will be replaced with two new related lists, Assigned Territories and Users in Assigned Territories, that you can add to your account page layouts.

The Assigned Territories lists allows administrators manually assign territories to accounts (Salesforce Classic only), and lets users identify which territories are assigned to their accounts.

Customers may choose to expose one or both of these on the Account page layouts in order to replace the Territories field. Veeva’s “View User Territory” Custom Link is also an alternative solution, as it will be supported in both TM1.0 and TM2.0. The new TM2.0 related lists will only be supported in the online application. Veeva’s “View User Territory” Custom Link is also online-only. Make sure that the related list includes the standard and custom fields (if any) that admins and users need.

For offline, you may choose to utilize a custom setting in Veeva Settings called “Territory Link on Account” enables a special Territory field to be exposed offline. It will be supported in both TM1.0 and TM2.0.
PUBLIC GROUPS

Overview

Salesforce Public Groups should be evaluated as part of your org’s Territory Management 2.0 gap analysis. In this section, definitions for the following will be reviewed:

- What is a Group?
- What is a Public Group?
- What is a Group Type?
- What is a Group User Set?

What is a Group?

A group consists of a set of users. A group can contain individual users, other groups, or the users in a particular role or territory. It can also contain the users in a particular role or territory plus all the users below that role or territory in the hierarchy.

What is a Public Group?

Administrators and delegated administrators can create public groups. Everyone in the organization can use public groups. For example, an administrator can create a group for an employee carpool program. All employees can then use this group to share records about the program.

What is a Group Type?

A Group Type is the way in which users are added to a public group. As previously stated, a group can contain individual users (Type: Users), other public groups (Type: Public Groups), users in a particular role (Type: Role), users in a particular territory (Type: Territory), users in a particular role plus all the users below that role (Type: Role and Subordinates), and users in a particular territory plus all the users below that territory (Type: Territory and Subordinates).

What is a Group User Set?

A Group User Set is an individual user or set of users that are assigned to a particular Group via a Group Type.

TM2.0 Impacts

If a Salesforce Public Group is created with Public Group Type “Territory” or “Territory and Subordinates”, those users will no longer be part of the group once Enterprise Territory Management is activated. Go through all your org’s Public Groups and document any Public
Group that have a User Group with Type "Territory" or "Territory and Subordinates". These user sets will have to be recreated referencing the T2.0 Territory once Enterprise Territory Management is activated.

Veeva Best Practice Recommendation

Veeva recommends having the same node structure for Role Hierarchy as Territory Hierarchy. This way, instead of creating Group User Sets with Territory Hierarchy, create new Group User Sets with the equivalent node in Role Hierarchy. For example, instead of Type "Territory and Subordinates" and selecting the "Medical" Territory Hierarchy node, select Type "Role and Subordinates" and choose your "Medical" Role Hierarchy node. This way, Group User Sets that reference Territory will not need to be recreated for Enterprise Territory Management.
REPORTS and DASHBOARDS

Overview

Salesforce Reports and Dashboards should be evaluated as part of your org's Territory Management 2.0 gap analysis. In this section, definitions for the following will be reviewed:

- What is a Report?
- What is a Dashboard?
- What is a Report Type?

This section will also conduct an in-depth analysis of how Salesforce Reports and Dashboards will be impacted by enabling Enterprise Territory Management. In the last part of this section, you will be provided with recommendations based on Veeva best practices.

What is a Report?

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart.

Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write. You control who has access to the contents of the folder based on roles, permissions, public groups, and license types. You can make a folder available to your entire organization, or make it private so that only the owner has access.

What is a Dashboard?

A dashboard is a visual display of key metrics and trends for records in your org. The relationship between a dashboard component and report is 1:1; for each dashboard component, there is a single underlying report. However, you can use the same report in multiple dashboard components on a single dashboard (e.g., use the same report in both a bar chart and pie chart). Multiple dashboard components can be shown together on a single dashboard page layout, creating a powerful visual display and a way to consume multiple reports that often have a common theme, like sales performance, customer support, etc.

Like reports, dashboards are stored in folders, which control who has access. If you have access to a folder, you can view its dashboards. However, to view the dashboard components, you need access to the underlying reports as well. You can also follow a dashboard in Chatter to get updates about the dashboard posted to your feed.
**What is a Report Type?**

A report type is like a template which makes reporting easier. The report type determines which fields and records are available for use when creating a report. This is based on the relationships between a primary object and its related objects. For example, with the ‘Accounts with Territories’ report type, ‘Account’ is the primary object and ‘ Territories’ is the related object.

Reports display only records that meet the criteria defined in the report type. Out of the box, Salesforce provides a set of predefined standard report types. Don't see all the fields you want? You might need to create a custom report type.

**TM2.0 Impacts**

Salesforce Reports and Dashboards can be impacted in multiple ways when transitioning from TM1.0 to TM2.0. Consider two different use cases:

- The Report or Dashboard may reference TM1.0 objects
- The Report or Dashboard is shared via the Territory Hierarchy

1. Dashboards and both standard reports and custom report types may reference TM1.0 objects like Territory, UserTerritory, or AccountShare. The Salesforce Reports and Dashboards referencing Territory objects will be upgraded to support TM2.0 objects when enabling Enterprise Territory Management in the org, but you may lose access to all of the TM1.0 data in the process. For this reason, all data from reports that touch the TM1.0 objects must be extracted before turning on TM2.0 in your org. These would be reports with Report Types:
   a. Territories
   b. Users with Territories
   c. Users with Multiple Territories
   d. Users without Territories
   e. Accounts with Territories
   f. Accounts with Territories and Country
   g. Accounts with Multiple Territories
   h. Accounts with Multiple Territories and Country
   i. Accounts without Territory
   j. Accounts without Territories and Country
   k. Opportunities with Territories
   l. Opportunities without Territories
   m. Any custom report types related to any of the aforementioned TM1.0 objects

In order to identify which reports have the stated report types, follow this Salesforce Link to build a custom report in order to view Report Types. Then, create a filter on Report Type so that only these reports are shown.
2. Salesforce Report and Dashboard folders may be accessible, or shared via, the Territory Hierarchy. For example, a Report folder may be shared with a certain “Territory” or “Territory and Subordinates”. In order to identify which folders are shared with either “Territory” or “Territory and Subordinates”, follow these steps:
   a. Navigate to the Reports tab
   b. Hover over each Report/Dashboard Folder and click . If Enhanced Folder Sharing is enabled in the org, select Share.
   c. If Enhanced Folder Sharing is not enabled, select Edit.

All folders shared via the Territory Hierarchy will need to be re-shared once Enterprise Territory Management is enabled.

Veeva Best Practice Recommendation

Because of the potential for data loss, it is best practice to extract all report data referencing Territory Management 1.0 objects before enabling Enterprise Territory Management in your org.

Veeva recommends sharing access to Salesforce Reports and Dashboards via the Role Hierarchy. For example, a report folder could be shared with specific “Roles” or “Roles and Subordinates”.

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SHARING RULES

Overview

Salesforce Sharing Rules should be evaluated as part of your org’s Territory 2.0 gap analysis. In this section, we will define what is a Sharing Rule and how to determine if a Sharing Rule will be impacted by Enterprise Territory Management.

What is a Sharing Rule?

Sharing Rules are automatic exceptions to organization-wide default for a particular group of users, so they can get records they don’t own or can’t normally see. Sharing Rules are only used to give additional users access to records. They can’t be stricter than your organization-wide default settings.

TM2.0 Impacts

Salesforce Sharing Rules can be impacted in multiple ways when transitioning from TM1.0 to TM2.0. Consider four different use cases:

- A Sharing Rule has been created for “Account Sharing Rule”
- A Sharing Rule has been created for “Account Territory Sharing Rules”
- The criteria of a Sharing Rule references Territory Hierarchy (“Territory” or “Territory and Subordinates”)
- A Sharing Rule is being shared with Territory Hierarchy (“Territory” or “Territory and Subordinates”)

1. Account Share is a TM1.0 Object. All Sharing Rules for this object will need to be remade as new Sharing Rules.

2. Account Territory is a TM1.0 object. Account Territory Sharing rules are no longer supported under TM2.0. There are two Salesforce recommended work arounds:
   a. Add the users impacted by account territory sharing rules to the Source Territory as users assigned to the territory
   b. Create a new territory, with the same assignment rules as the Source Territory
3. For any object, the criteria for sharing can reference Territory Hierarchy. Go through all your org’s Sharing Rules and document any Sharing Rule with a criterion that references “Territory” or “Territory and Subordinates”. These rules will have to be recreated referencing the T2.0 Territory once Enterprise Territory Management is enabled.

![Account Plan Sharing Rules](image)

4. For any object, a Sharing Rule can be “Shared With” Territory Hierarchy. Go through all your org’s Sharing Rules and document any Sharing Rule that references “Territory” or “Territory and Subordinates” in the “Shared With” column. These rules will have to be recreated referencing the T2.0 Territory once Enterprise Territory Management is enabled.

![Account Plan Sharing Rules](image)

Examples of Commonly Shared Objects

- CLM
- Presentations
- Key Messages
- Account Plans

Veeva Best Practice Recommendation

Veeva recommends having the same node structure for Role Hierarchy as Territory Hierarchy. This way, instead of creating criteria or sharing with Territory Hierarchy, create new Sharing Rules that share with the equivalent node in Role Hierarchy. For example, instead of Sharing With your “Medical” Territory Hierarchy node, Share With your “Medical” Role Hierarchy node. This way, Sharing Rules will not need to be recreated for Enterprise Territory Management.
Overview

Salesforce Flows need to be evaluated as part of your org’s Territory management 2.0 gap analysis. In this section, definitions for the following will be reviewed:

- What is a Flow?
- What is the Territory 1.0 data model?
- What is the Territory 2.0 data model?
- What are the differences between the two data models?

What is a Flow?

A Flow is an application that automates a business process by collecting data and doing something in your Salesforce org or external system.

What is the Territory 1.0 Data Model?

The following image is a list of all the objects, fields, and relationships associated with the Territory 1.0 data model.

What is the Territory 2.0 Data Model?

The following image is a list of all the objects, fields, and relationships associated with the Territory 2.0 data model.
What are the differences between the two data models?

The differences between the two models can be broken down into 3 major components: Updated Objects, New Objects, and New Data Structure.

1. Updated Objects

   In the T2.0 model, there are objects that serve similar purposes as T1.0 objects. Although they are new objects with new names and fields, think of these as updated objects with similar functionality.
   a. Account Share -> ObjectTerritory2Association (this isn't a direct 1:1 relationship but serves similar function)
   b. UserTerritory -> UserTerritory2Association
   c. Territory -> Territory2
   d. AccountTerritoryAssignmentRule -> ObjectTerritory2AssignmentRule
   e. AccountTerritoryAssignmentRuleItem -> ObjectTerritory2AssignmentRuleItem

2. New Objects

   With T2.0, additional functionalities have been added to the Territory Structure, and with that, comes additional items. The functionalities of these items are not significant for evaluating past flows since nothing similar existed in T1.0
   a. Territory2Type
   b. Territory2Model
   c. RuleTerritory2Association
3. New Data Structure

As pictured in the diagrams for the data models, the structure and relationship between the objects are vastly different between T1.0 and T2.0. In the T2.0 model, the Territory2 object is the centric object of the data model. This object now has a direct relationship with the User object and the ObjectTerritory2Association (previously AccountShare) object.

TM2.0 Impacts

If a flow touches any of the T1.0 objects, this flow will have to be recreated once Enterprise Territory Management is activated. Not only will the flow’s object references need to be replaced with the new T2.0 objects, but the structure of the flow will have to be amended to follow the T2.0 data model. Because the T2.0 structure is Territory-centric, the recreated flow should end up being simpler than its predecessor.
PROCESS BUILDER (PB)

Overview

Although Salesforce Lightning Process Builder (PB) do not directly touch any Territory 1.0 objects, Process Builders still need to be evaluated as they can call other components that are affected by Enterprise Territory Management.

TM2.0 Impact

Although Salesforce Lightning Process Builder (PB) will not directly touch any Territory 1.0 objects, Process Builders can have actions that call on Apex code, Flows, Approval Processes, and/or creates or updates records on objects that reference territory. In order to evaluate Process Builders, first, evaluate all your org’s Apex Code, Flows, Approval Processes, and data records that touch the territory affected objects (MCCP, Cycle Plans, Surveys, EM Budget, etc) as outlined in this guide. Once a list has been created of those actions and data records that need to be changed, navigate through your org’s active Process Builders to see if these actions are referenced. Our order of operations for evaluating a Process Builder is as follows:

1. Check the object that starts the Process Builder to see if it's one of the objects outlined in the object assessments

2. If the starting object is one that is outlined in the object assessments, check the conditions or formulas in the criteria nodes. If the criteria references territory, be sure to mark that Process Builder down as one that will possibly need to be reworked. If Veeva Best Practice is consistently used when uploading the new territory structure and reworking the data that drives these objects, it is possible that this will not need to be adjusted.

3. Go to the action group and check if an action either creates or updates a record associated with one of those territories affected objects. If the record that is created or updated references territory, again it is a possibility that this needs to be reworked.

4. Continue searching the action group for actions that call Apex Code, Flows, or Approval Processes. Check to see if these actions have been identified as ones that need to be reworked when Enterprise Territory Management is activated. If so, mark the Process Builder as one that needs to be reworked as it will need to be cloned and call the newly reworked action instead of the out-of-date on.
TERRITORY FIELD MANAGEMENT (TSF)

Overview

If any functionalities leveraging Territory Specific Fields are used, data residing in TSF_vod object should be backed up and analyzed for TM 2.0 implementation.

TSF functionalities include:
- My Preferred Location
- My Preferred Address
- Allowed Product
- Last Activity Date
- # of Days Since Last Visit
- YTD Activity
- Territory Alignment by Product and Account
- Any additional custom fields added to the TSF_vod object

What is Territory Field Management (TSF)?

Territory field management allows users to maintain and view territory-specific fields for a particular account. It is used to capture details regarding an interaction for a Rep specific to the Account for that territory.

TM 2.0 Impact

Although the TSF_vod object does not reference territories directly, the values in the Territory field should still be analyzed to ensure it matches against TM 2.0 territory labels. See below for an example of a TSF record:
CYCLE PLANS

Overview

Although there is no direct lookup to any Territory 1.0 object, Veeva’s Cycle Plans still need to be considered when updating to Enterprise Territory Management.

TM2.0 Impact

As shown in the image below, each Cycle Plan has a text field that references Territory by the Territory’s Label. When creating the 2.0 Territory Hierarchy, if the Territory Labels are identical to that of 1.0 Territory Hierarchy, Cycle Plans will **not** need to be adjusted. If the 2.0 Territory Hierarchy does not exactly match the 1.0 Territory Hierarchy by Territory Label, the Territory field on the Cycle Plan records will need to be updated to match the new 2.0 Territory Label.

Veeva Best Practice Recommendation

Veeva recommends using identical Territory Labels and Territory Names as the T1.0 Hierarchy when building out the T2.0 Hierarchy.
MULTICHLANNEL CYCLE PLANS

Overview

Although there is no direct lookup to any Territory 1.0 object, Veeva’s MultiChannel Cycle Plans must still be considered when updating to Enterprise Territory Management.

TM 2.0 Impact

Although there are many objects associated with MCCP, the important one to look at is “MC Cycle Plan”. As shown in the image below, each MC Cycle Plan has a text field that references Territory by the Territory’s Label. When creating the 2.0 Territory Hierarchy, if the Territory Labels are identical to that of 1.0 Territory Hierarchy, MC Cycle Plans will not need to be adjusted. If the 2.0 Territory Hierarchy does not exactly match the 1.0 Territory Hierarchy by Territory Label, the Territory field on the MC Cycle Plan records will need to be updated to match the new 2.0 Territory Label.

Veeva Best Practice Recommendation

Veeva recommends using identical Territory Labels and Territory Names as the T1.0 Hierarchy when building out the T2.0 Hierarchy.
TERRITORY HIERARCHY

Overview

Territory Hierarchy is scheduled for retirement as of Summer 2020. The current Territory Hierarchy should be analyzed and migrated to Territory 2.0 before its retirement.

What is Territory2?

Territory2 is the replacement object for the current Territory object used for Territory Hierarchy. In addition, Territory2 adds the concept of Territory Models (each model being the equivalent of a Territory Hierarchy) and Territory Types. Territory2 Models can be set to Planning, Active, or Archived states for Territory management.

TM 2.0 Impact

Prior to activating Enterprise Territory Management, the current Territory object should be exported and analyzed. During this stage, at least one territory type and model should also be defined. Once the Territory2 Models have been created, account and user alignments would need to take place before activating the Territory2 Model.

TM 1.0:

Creating the Territory Hierarchy (Scheduled for Retirement as of Summer ’20)

You can build on the existing territory hierarchy shown on this page. To insert a new territory, click Add Territory.

Your Organization’s Territory Hierarchy

Collapse All Expand All

- Corp
  - US (Planning)
    - California
      - San Francisco
    - Other States

TM 2.0:

US Territory Hierarchy (Planning)

- US (Planning)
  - California
    - San Francisco

Run Assignment Rules | Archive | New Value
SURVEYS

Overview

The sharing of Veeva CRM’s Surveys Module should be evaluated as part of your org’s Territory Management 2.0 gap analysis.

TM2.0 Impacts

Veeva’s Surveys are assigned through Territory Hierarchy (as pictured below). The labels of the Territories to which a Survey is assigned are concatenated and stored in a text field on the Survey object.

When creating the 2.0 Territory Hierarchy, if the Territory Labels are identical to that of 1.0 Territory Hierarchy, Surveys will not need to be adjusted. If the 2.0 Territory Hierarchy does not exactly match the 1.0 Territory Hierarchy by Territory Label, then currently active Survey records will need to be updated so that the Territories that are referenced match the new 2.0 Territory Labels.
ROLE HIERARCHY

What is Role Hierarchy?

Salesforce offers a user Role Hierarchy that you can use with sharing settings to determine the levels of access that users have to your Salesforce org’s data. Roles within the hierarchy affect access to key components such as records and reports.

Veeva Best Practice Recommendation

Veeva always recommends aligning your org’s Role Hierarchy with your org’s Territory Hierarchy (see image below). To prepare for Enterprise Territory Management, you should amend your Role Hierarchy to follow the below example. If your Role Hierarchy follows this format, your team can preemptively adjust Sharing Rules to Share By Role Hierarchy rather than Territory Hierarchy; this way, your sharing settings will already be prepared prior to the activation of Enterprise Territory Management.
INTEGRATIONS AND CUSTOMIZATIONS

Overview

Customers often integrate external systems into Veeva CRM in order to automate the flow of data between systems. Many customers also write Apex code customizations to automate processes within Veeva CRM.

If you have any integrations or Apex code customizations, then both of these will need to be analyzed in order to establish whether the code is querying, inserting or updating to TM1.0 objects. If your integrations or code customizations are doing these things, then they will be impacted by the move to TM2.0 and will need to be remediated.

TM1 vs. TM2 Object Usage

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<th>TM2 Object</th>
<th>Comments</th>
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<td>Territory</td>
<td>Territory2</td>
<td></td>
</tr>
<tr>
<td>Read or Update User-to-Territory Assignments</td>
<td>UserTerritory</td>
<td>UserTerritory2Association</td>
<td></td>
</tr>
<tr>
<td>Read or Update Account-to-Territory Assignments</td>
<td>AccountShare</td>
<td>ObjectTerritory2Association</td>
<td>While AccountShare will still exist after TM2.0 is activated, it should never be used directly to make Account to Territory assignments after moving to TM2.0.</td>
</tr>
</tbody>
</table>

Veeva Best Practice Recommendation

Integrations

For integrations, new versions should be developed that query or write to TM2.0 objects and should be in place ready for cutover.
Apex Customizations

When migrating custom Apex code, there are two options:

1. Modify code to support TM2, and promote code changes from sandbox to production during the migration window.
2. Modify the code to be backward compatible with TM1 and TM2, and promote code changes from sandbox to production either before or during the migration window.

The advantage to the second option is that code can be migrated at any time. This is useful when custom code is managed in a "core" environment, and the migration windows for multiple regional CRM orgs is staggered over multiple weekends. It is also useful for reducing the number of steps needed during the migration window.

Apex Compiler Errors

If you are referencing TM1 or TM2 objects in your custom Apex code then you may find that your custom Apex code will not compile. The reason for this is because if the org is on TM1 then the compiler will not recognize the TM2 objects, and conversely if the org is on TM2 then the compiler will not recognize the TM1 objects. To avoid these compiler errors, Apex code references to object types should be text-based.

Examples:

1. Querying an object:

   Database.query('Select Id, Name from Territory')

2. Determining if an object exists:

   Type t2Type = Type.forName('Territory2');
   boolean haveTM2 = t2Type != null;

3. Retrieving metadata for an object that may or may not exist. Note, if the object exists, the metadata will return. Otherwise, a value of null will return.

   Schema.DescribeSObjectResult[] descResult =
   Schema.describeSObjects(new String[]{'Territory2'});

4. Dynamic DML, used to manipulate data in a backward-compatible fashion with TM1 and TM2 objects

   Schema.SObjectType associationType =
   Schema.getGlobalDescribe().get('UserTerritory2Association');
String territoryLookupName = 'Territory2Id';
if (associationType == null) {
    associationType = Schema.getGlobalDescribe().get('UserTerritory');
    territoryLookupName = 'TerritoryId';
}
SObject association = associationType.newSObject();
association.put(territoryLookupName, territoryId);
association.put('UserId', userId);
insert association;

Field Mappings
Please refer to the Appendix for field mappings.

Usage of ATL
Apex code or integrations that insert into or update the Veeva ATL (Account Territory Loader) object will not need to remediate for TM2.0. The Veeva product team is changing the Veeva ATL object so that it will use TM2.0 objects after an org has moved to TM2.0.
APPENDIX

TM1 Objects to be Migrated

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<td>Territory2</td>
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<td>UserTerritory</td>
<td>UserTerritory2Association</td>
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<tr>
<td>AccountShare</td>
<td>ObjectTerritory2Association</td>
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Notes:
Zip-to-terr will automatically recreate assignment rules when run in an org using TM2

 Territory → Territory2 Field Mapping

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<tr>
<th>Territory Fields</th>
<th>Territory2 Fields</th>
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<td>AccountAccessLevel</td>
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<tr>
<td>CaseAccessLevel</td>
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</tr>
<tr>
<td>ContactAccessLevel</td>
<td>ContactAccessLevel</td>
</tr>
<tr>
<td>Description</td>
<td>Description</td>
</tr>
<tr>
<td>DeveloperName</td>
<td>DeveloperName</td>
</tr>
<tr>
<td>ForecastUserId</td>
<td>ForecastUserId</td>
</tr>
<tr>
<td>MayForecastManagerShare</td>
<td>-</td>
</tr>
<tr>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>OpportunityAccessLevel</td>
<td>OpportunityAccessLevel</td>
</tr>
<tr>
<td>ParentTerritoryId</td>
<td>ParentTerritory2Id</td>
</tr>
<tr>
<td>RestrictedOpportunityTransfer</td>
<td>-</td>
</tr>
<tr>
<td>-</td>
<td>Territory2ModelId</td>
</tr>
<tr>
<td>-</td>
<td>Territory2TypeId</td>
</tr>
</tbody>
</table>
**Notes:**
Territory2ModelId and Territory2TypeId are reference fields to the Territory2Model and Territory2Type objects. These objects only exist in TM2. Before creating any territories in the Territory2 object, customers must first create a minimum of one Territory Type and one Territory Model, and populate this reference value for all rows in the Territory2 insert file.

**UserTerritory → UserTerritory2Association Field Mapping**

<table>
<thead>
<tr>
<th>UserTerritory Fields</th>
<th>UserTerritory2Association Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>IsActive</td>
<td>IsActive</td>
</tr>
<tr>
<td>TerritoryId</td>
<td>Territory2Id</td>
</tr>
<tr>
<td>UserId</td>
<td>UserId</td>
</tr>
<tr>
<td></td>
<td>RoleInTerritory2</td>
</tr>
</tbody>
</table>

**Notes:**
RoleInTerritory2 is a new picklist field in TM2 that enables:
- Creating custom picklist values to define a User’s role in a Territory (e.g. Territory Owner, Sales Manager, Sales Representative)
- Define a role value for any User/Territory assignment
This field is not required and migration can be completed without setting a value for this field.

**AccountShare → ObjectTerritory2Association (OTA)**

<table>
<thead>
<tr>
<th>AccountShare Fields</th>
<th>OTA Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>AccountAccessLevel</td>
<td>-</td>
</tr>
<tr>
<td>AccountId</td>
<td>ObjectId</td>
</tr>
<tr>
<td>CaseAccessLevel</td>
<td>-</td>
</tr>
<tr>
<td>ContactAccessLevel</td>
<td>-</td>
</tr>
<tr>
<td>IsDeleted</td>
<td>IsDeleted</td>
</tr>
<tr>
<td>OpportunityAccessLevel</td>
<td>-</td>
</tr>
</tbody>
</table>
### RowCause | AssociationCause
---|---
UserOrGroupId | Territory2Id
- | SobjectType

**Note:**
The RowCause of AccountShare records determines whether they should be migrated, and if so *how* they should be migrated.

<table>
<thead>
<tr>
<th>RowCause</th>
<th>Action Required</th>
</tr>
</thead>
</table>
| **“TerritoryManual”**  
*Represents the assignment of an Account to a Territory due to it being manually assigned via the API or Setup UI.* | An OTA record should be created:  
- AssociationCause should be set to “Territory2Manual”.  
- SobjectType should be set to “Account”.  
- AccountAccessLevel, CaseAccessLevel, and OpportunityAccessLevel are defined on the Territory2 record. It is not necessary to set these values when migrating data into the OTA table. |
| **“Manual”**  
*Represents the granting of visibility of an Account to a Territory due to it being shared via the “Sharing” button on the Account page.* | If the AccountShare is associated with a Territory, then an AccountShare record should be created with a RowCause value of “Manual”. An AccountShare is associated with a Territory if the corresponding Group record has a Type of “Territory” or “TerritoryAndSubordinates”.  
If the AccountShare is not associated with a Territory, then no action is required as the AccountShare record will persist once the org is transitioned onto TM2. |
| **“Territory”**  
*Represents the assignment of an Account to a Territory due to a Territory Assignment Rule.* | If using the Zip-to-Terr tool, this can be used to automatically rebuild rules into the currently active Model in TM2.  
If Territory Assignment Rules have been manually created in TM1 (i.e. not via Zip-to-Terr), then these can be migrated by recreating the necessary rule records in TM2:  
- ObjectTerritory2AssignmentRule  
- ObjectTerritory2AssignmentRuleItem |
| **“Rule”**  
*Represents the granting of visibility of an Account to a Territory due to an Account* | Either:  
1. Rebuild the Sharing Rule once TM2 has been |
| **Sharing Rule.** | enabled.
…or…  
2. Re-work the existing Sharing Rules so that they share with the Role hierarchy instead of the Territory hierarchy (this approach is recommended if the Role hierarchy mirrors the Territory hierarchy, and it can be completed prior to TM2 enablement and Veeva’s 19R3 release). |
|---|---|
| **“TerritoryRule”**  
*Represents the granting of visibility of an Account (to either a Public Group, Role or Territory) due to it belonging to a given Territory or Territory branch.* | TM1’s “Account Territory Sharing Rules” functionality does not exist in TM2. If your org contains these special kind of sharing rules then Salesforce.com recommend ensuring that the members of the target group (i.e. the Public Group or Role) are assigned to a Territory, and that the Territory has the Accounts assigned to it. |
| **“Owner”**  
*Represents the granting of visibility of an Account to a User due to the User being the Account’s owner.* | No action required. These AccountShare records will persist when transitioning onto TM2. |