

Territory Management 2.0

Questions and Answers

Q: What is the impact on AccountShare, ATL, and Zip-to-terr?

A: ATL and Zip-to-terr will continue to work as they do today. When these tools are run, Veeva will detect if the environment is on TM1 or TM2 and operate accordingly. AccountShare will continue to exist, but Veeva will begin interacting with an intermediary object called ObjectTerritory2Association (OTA). When records are inserted into OTA, Salesforce automatically creates an AccountShare record. We recommend that customers also use OTA when reading or writing territory assignments via custom process because it is smaller and faster than AccountShare (because it only contains a subset of the AccountShare records), is available in reporting, and supports custom triggers.

Q: What is the impact on the CLM synchronization process from Vault?

A: There is no impact on the CLM synchronization process from Vault. If CLM deep content references a Territory or UserTerritory, the content will require updating. The updated content will be automatically synced to CRM in the same way it is synced today. However, if CLM is shared based on territory in CRM, the responsible sharing rules will require updates.

Q: Is Veeva CRM / Veeva Align Integration included in the changes Veeva is making to address the switch over?

A: Yes, Veeva Align is also planning to support TM2 in 19R3. Align will detect if the CRM org is on TM1 or TM2, and push territories, user territories, and assigned accounts to the new TM2 data model accordingly.

Q: How will Veeva support MyInsights dashboards that have been built with the MyInsights builder?

A: This will be handled on a case-by-case basis. If you have any questions, please reach out to skyler.martin@veeva.com.

Q: What does the assessment tool search for and how do you know it is picking up all areas of potential impact?

A: The assessment tool scans the Salesforce Org metadata for the strings "territ" and "accountshare". This creates a superset of potentially impacted components that require evaluation.

Q: How is data migration handled, and who will do this?

A: Data migration can be done manually. Customers who have the in-house skillsets can do this themselves. Veeva Services as well as Veeva's Partners will also be available if additional support is needed.

Veeva has included a field mapping appendix to the Territory Management 2.0 Gap Analysis Guide. The guide can be found [here](#).

Additionally, data will be migrated automatically for Veeva Align customers.

Q: Converting from TM1 to TM2 has to be done in a sandbox, but it might involve a lot of data changes. Can we enable TM2 in production but still work on TM1 to help reduce the maintenance window to migrate all changes?

A: Once TM2 is enabled in the Salesforce Org, TM1 objects are no longer available. It is not possible today to enable TM2 but still use TM1. It is recommended that TM2 is enabled on a Friday night (or one day before the weekend, depending on country), and the migration takes place over a weekend. In the Winter '20 release, Salesforce is planning an enhancement that allows customers to enable TM2 but continue to use TM1 alignments until the first TM2 model is activated. Please note that migration of certain elements, such as sharing rules, reports, and manual sharing to TM2 can only occur once the TM2 model is activated. As such, Winter '20 enhancement can be used on a short term bridging solution, but may not be suitable for long term use.

Q: Where can we get more details on the impact of the migration?

A: The CRM Territory Management 2.0 Gap Analysis documentation covers key parts of a Veeva CRM environment to consider when migrating to TM 2.0. This documentation has been reviewed by Salesforce. It is available at <https://support.veeva.com>, currently stickied to the Announcements section of the homepage.

Q: Are Veeva partners being offered the same level of support as CRM customers?

A: Partner environments will receive Veeva Product upgrades per normal upgrade process, and be TM2.0 ready in 19R3 release. Modifications that partners have made to their environments including customizations, reports, etc can be completed by customers with in-house expertise, Veeva Services, or Veeva ISV partners. If you would like an assessment run on a partner org please reach out to your Veeva partner liaison.

Q: What is the expected level of effort for the migration?

A: The expected level of effort will vary considerably depending on the amount of custom code and other components that reference TM1 objects in your Salesforce environment. Based on early analysis, the majority of Veeva customers do not have significant amounts of custom code that will increase the level of effort, and Veeva is in the process of creating standardized migration offerings based on the results of the impact assessment.

Q: Is Veeva going to introduce any new features leveraging the new TM2.0 data model?

A: Veeva will begin using the ObjectTerritory2Association table, which will improve performance for ATL. Beyond that, our primary focus is on enabling customer migrations before the end-of-life of TM1. Customers can enable new TM2 features based on your analysis and needs.

Q: Will account owner access still work the same way?

A: Yes, Account Ownership and visibility to accounts where the user is the owner are not impacted.

Q: Will there be any impact if we use both Account Territory Loader (ATL) and Zip-to-Terr at the same time with different rule set up under territory hierarchy ?

A: The goal of Veeva is to make existing functionality continue to operate in the same way it does today. Behind the scenes, these modules will be interacting with the TM2 tables instead of the TM1 tables, but will work the same way when it comes to account assignments.

Q: Does the assessment run by Veeva exclude updates that will be done by Veeva product?

A: Yes, the assessments automatically remove components that will be upgraded as part of Veeva CRM's 19R3 release.

Q: Where can we get the TM2.0 architecture?

A: The TM2 data model is published at https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_erd_territory2.htm

Q: Will the 19R3 changes to Veeva Align also be available by 11/15?

A: Align provides a minor release (193.1) and a major release (193.3). Due to the more frequent release cadence, Align has a shorter sandbox period, which is one week prior to production release. Based on current timelines, Align sandboxes will support TM2 on December 6th.

Q: Once we enabled TM2.0 we lost access to the objects belonging to TM1.0. How do we restore access to those objects?

A: Veeva and Salesforce strongly recommend creating a backup of your current TM1 objects before enabling TM2. If data recovery is needed, please contact Salesforce support.

Q: What are the implications if we cannot migrate to TM 2.0 by June 2020?

A: If migration is not complete by June 2020, users logging into CRM will not have a territory, nor will they have access to accounts where access was granted by territory association.

Q: When will we find out how many and what types of data migration tools Veeva will provide?

A: Veeva is targeting the end of October to finalize remediation offerings.

Q: Will the Territory Id change after migration?

A: Yes, the territory Id will change.

Q: Where can we find out about the new features of TM2.0?

A: You can find out more about TM2 from Salesforce's documentation - https://help.salesforce.com/articleView?id=tm2_intro.htm&type=5

Q: Will we be responsible for re-coding apex classes and triggers?

A: Code updates can be completed by customers with in-house expertise, Veeva Services, or Veeva ISV partners.

Q: Is there any impact to the Historic data?

A: We do not anticipate impact to historic data. Salesforce does not support relationships directly to territory objects, so any existing data that references territories is doing so by stamping the territory name. For example, the Call Report in Veeva CRM stamps the territory name in a text field. As long as the new territory names are the same, it is possible to determine the territory of your historic interaction data.

Q: How will Vinsights be affected, if at all?

A: The impact to VInsights will be addressed by the Veeva CRM product in 19R3.

Q: What is the expected time required to migrate from TM1 to TM2?

A: Salesforce guidance is that a typical migration window will require one weekend.

Q: Will "Territory Fields" object continue to work in the same way?

A: Yes, the Veeva TSF object uses the territory name stamped into a text field, so historic data will not be impacted as long as the new territories use the same name.

Q: Veeva currently stores the Territory.Name in some objects (eg. Call, Cycle Plan, Time Off Territory), will you add the Territory.Id since TM2.0 will allow the same Territory.Name across multiple Territory Hierarchy/Models?

A: Veeva is not planning on updating the stamping logic. TM2 does not allow reuse of territory names within a model, and only one model is active concurrently, so it is not possible to have two active territories with the same name.

Q: Will the API daily limit be lifted the day when we move to TM2.0?

A: Based on data from previous TM2 migrations, Salesforce does not expect a need to increase daily API limits.

Q: Is there an additional Full Sandbox available for testing the migration to TM 2.0?

A: As a result of Veeva's partnership with Salesforce, Salesforce have agreed to extend the deadline for TM1 retirement until June 2021. This extended timeline should allow customers to include remediation in their normal release process and not require an additional sandbox.

Q: Will the Global Account Search module be updated in 19R3?

A: Yes, Veeva Commercial Technical Services will be producing a new version of GAS that is compatible with TM 2.0. This is targeted for December to coincide with the 19R3 release.

Q: When will I be able to transition my Sandboxes onto TM2?

A: CRM Sandboxes will become "TM2-ready" as soon as they've been upgraded to release 19R3. This is currently scheduled for November 15th, 2019. Developer Sandboxes can be migrated to TM2 for the purpose of migrating custom code, but some Veeva functionality will be unusable in this environment before 19R3.

Q: What will the Org Assessment Tool analyze, and what will it not analyze?

A: The Org Assessment Tool will analyze all Salesforce.com metadata (unless it is part of the out-of-the-box Veeva functionality). This includes:

- Apex Classes
- Apex Components
- Apex Pages
- Apex Triggers
- Approval Processes
- Fields and Objects
- Formula Fields
- Process Builder Flows
- Page Layouts
- Reports
- Sharing Rules
- Workflow Alerts
- Workflow Field Updates
- Workflow Rules
- Workflow Tasks

The Org Assessment Tool will not analyze the following items:

- MyInsights
- CLM Content
- External Integrations

Q: Where can we get information on the mapping between the TM1 and TM2 data models?

A: Veeva has published a document which details the mapping between TM1 and TM2 objects and fields. It can be found [here](#).

Q: We have an org which is under legal hold. What would happen to the data in this org if nothing is done? Will the data linkages be broken, but data remain intact?

A: If a CRM org is not transitioned onto TM2 before the June 2020 retirement date for TM1, then the Territory hierarchy and Territory assignment (user-to-territory and account-to-territory) information will be lost. Transactional data (e.g. Call Reports, TSF, Survey Targets) will still contain the name of the Territory to which it is associated.

Q: Should I retain the same DeveloperName values for my Territories when migrating to TM2?

A: Veeva recommends that you retain the same Territory structure (including the same Name and DeveloperName values) for your territories when migrating data into TM2.

Q: Can we transition multi-country orgs country-by-country? Or do we have to transition the entire org in one go?

A: Enabling TM2 is an org-wide change. It is not possible to enable TM2 country-by-country within the same org.

Q: A number of objects within the out-of-the-box Veeva CRM data model contain fields that reference territories. Will this data be affected by the transition to TM2?

A: Veeva CRM contains a number of objects with "Territory_vod__c" fields, that reference a particular territory (e.g. Call2_vod__c, TSF_vod__c). These fields are text fields which are populated with the Name of the Territory to which they relate. For this reason, Veeva recommends that you retain the same Territory structure (including the same Name and DeveloperName values) for your territories when migrating data into TM2.

Q: Will all TM 2.0 features be available to Veeva customers?

A: We currently have no plans to prevent our customers from using any of the new features that are provided by Salesforce.com as part of TM2.0. Veeva Align customers should avoid using Territory Management 2.0's Modeling feature, and should instead use Veeva Align's industry-specific Modeling capability that allows for models by field force and assignment rules based on product metrics, multiple addresses, and hospital affiliations.

Q: What is the biggest advantage of TM 2.0 above TM 1.0, in terms of functionality?

A: Please refer to Salesforce's comparison document:
<https://help.salesforce.com/articleView?id=000338795&type=1&mode=1>

Q: Will the Veeva CRM to Veeva OpenData integration be impacted by the TM2 transition?

A: The out-of-the-box Veeva OpenData to Veeva CRM integration will continue to function once the CRM org has been transitioned onto TM2.

Q: Will I need to do anything to transition existing Survey data as part of the TM2 transition?

A: Provided that the territory structure and names remain the same when transitioning from TM1 to TM2, then no action should be required to migrate your Survey data.

Q: How should we handle custom fields that we've created on the Territory object?

A: It is possible to re-create these fields on the Territory2 object and migrate the data from these fields from Territory to Territory2.

Q: Will the Account Button „Assign Territory“ as well continue to work?

A: Yes. Our aim is for all Veeva out-of-the-box features to continue to behave in the same way in TM2 as they do in TM1. In the event that behavior changes are necessary, they will be documented as part of the release notes.

Q: Are the new TM2 tables already available in my existing CRM org, or will they only be generated when we switch to Territory 2.0?

A: The TM2 tables will become available once TM2 is enabled in your org.

Q: What Territory Management data do we need to migrate?

A: Your territory hierarchy, user assignments and account assignments will need to be migrated. Additionally, if you have manually created territory assignment rules then these too will need to be migrated. Veeva has included a field mapping appendix to the Territory Management 2.0 Gap Analysis Guide. The guide can be found [here](#).

Q: How will custom VisualForce pages and Apex Classes be impacted by the TM2 transition?

A: Any VisualForce pages or Apex Classes that either query or update a TM1 table will need to be enhanced so that they continue to function correctly once the org has been transitioned onto TM2. As TM2 is built upon a new data model, your existing customizations will need to work with the new TM2 tables.

Q: Are there any implications with regards to Salesforce.com limits that we need to be conscious of when transitioning onto TM2?

A: There is a limit on the number of Territories per TM2 Model, which is 1,000. This can be increased to 20,000 by contacting Salesforce Support, or 99,999 with approval from Salesforce. Any Sharing Rules that share with the Territory hierarchy should be deleted before TM2 is enabled, and then re-loaded once TM2 is enabled. If Sharing Rules that share with the TM1 Territory hierarchy are not first deleted, then these will count towards the Salesforce.com limit on number of Sharing Rules in the org.

Q: Which AccountShare records should be migrated?

A: Veeva has included details on the migration of AccountShare records into the appendix of the Territory Management 2.0 Gap Analysis Guide. The guide can be found [here](#).

Q: Will limits or performance of Brick to Terr functionality be impacted with TM2? e.g. there are currently some limits on the number of bricks and accounts that can be addressed by Territory Utilities.

A: Functionally, Brick/Zip-to-Terr functionality will remain the same (including limits). We do not anticipate any negative performance impact with TM2.

Q: Will my customizations and integrations that are dependent on AccountShare need to be remodeled to support TM2?

A: Yes these will be impacted. They will need to be enhanced so that they work with the TM2 data model. It is recommended that any operation that reads or writes territory assignments use the ObjectTerritory2Association table instead of AccountShare.

Q: In TM2, which object will store Account-to-Territory assignments?

A: Account-to-Territory assignments will be mastered by the OTA (ObjectTerritory2Association) object.

Q: Will the AccountShare table disappear with TM2?

A: No. The AccountShare table will remain, however there will be some changes to the RowCauses. To see the list of changes, please refer to number 14 on this document: <https://quip.com/1KTFAbTVe6Ke>. Note, this is a publicly-available document from Salesforce.com.

Q: What is the purpose of the OTA (ObjectTerritory2Association) object, and why are there now two intersections between Account and Territory (one via OTA and the other via AccountShare)?

A: Conceptually, account assignments and visibility are two separate things, and in TM1 both of those needs were met by AccountShare. The introduction of the OTA table gives customers a definitive list of which Accounts are directly assigned to a territory. Because OTA is a subset of AccountShare, there should also be a positive performance impact by minimizing the need to directly query AccountShare, which will potentially be much larger.

Q: We are considering deploying MyInsights in the near future. Should we delay this until after we have transitioned onto TM2?

A: MyInsights can be deployed prior to transitioning onto TM2. If this approach is taken, then any custom MyInsights reports that either query or update a TM1 table will need to be implemented so that they continue to function correctly once the org is transitioned onto TM2. Custom MyInsights reports that do not reference TM1 data will not be affected by the TM2 transition.

Q: How will Reports and Report Types be impacted in TM2?

A: Any Report Types that are based off of TM1 objects will no longer be available and require being rebuilt once TM2 is enabled. This includes several out-of-the-box Salesforce reports which are listed below along with the recommended replacement strategy:

- Account Territory Report: create a custom report type on Accounts Assigned to Territories:
https://help.salesforce.com/articleView?id=tm2_report_accounts_with_without_territories.htm&type=5
- Account Missing Territory Report: custom a report type that links the Accounts and Territories objects. Specify that the Accounts object may or may not have related Territory records, then apply a filter where Territory equals null
- User Territory Report: Report on Territories with Assigned Users:
https://help.salesforce.com/articleView?id=tm2_report_territories_with_without_users.htm&type=5
- User Missing Territory Report: Report on Users Not Assigned to Territories:
https://help.salesforce.com/articleView?id=tm2_report_on_users_with_without_territories.htm&type=5

- Territory Report: create appropriate custom report types:
https://help.salesforce.com/articleView?id=tm2_create_custom_report_types.htm&type=5
- Account with Multiple Territories, User with Multiple Territories: in Account/User Reports, group by AccountId/UserId and summarize using record count

Q: We are considering transitioning onto Lightning User Experience. Will this be impacted by TM2?

A: TM2 is compatible with both the Salesforce.com Classic UI and also the Lightning User Experience.

The following should be taken into consideration if planning to use TM1 in conjunction with the Lightning User Experience:

- TM1 setup pages are still accessible under Lightning setup.
- The “Territories” field on Account is not exposed on Lightning pages.
- There is no “Sharing” button on the Account Lightning page. This is generic to Lightning, and is not TM1-specific.

Q: Will Veeva be performing the org analyses on behalf of us? Or will Veeva provide us with the tool so that we do it ourselves?

A: Veeva will be performing the org analyses on behalf of customers who have given their approval for us to do so.

Additional questions?

Contact your customer support representative.