



TM2 Data Migration Guide

Steps for Migrating from Salesforce Territory Management 1.0 to Territory Management 2.0

Version Number	1.4b
Last Updated	March 25, 2020
Last Update	Added template for raising Veeva Support ticket Fixed minor typo in Scenario 1 Step 21 and Scenario 3 Step 23.

NOTE: This is an on-going reference document for the Territory Management 2.0 Data Migration Guide. Please check back periodically to view the most recent updates.



Table of Contents

Table of Contents	2
Introduction	5
Assumptions / Target Audience	5
Scenarios	5
Best Practices	5
Scenario 1: Veeva CRM org with no Veeva Align integration	6
Step 1. Export Territories from your TM1 org	6
Step 2. Relabel the Id column in the Territory csv file	6
Step 3. Export UserTerritory from your TM1 org	6
Step 4. Relabel the Id and TerritoryId columns in your UserTerritory csv file	6
Step 5. Determine if your company has custom Account Territory Assignment Rules	6
Step 6. Export Account Territory Assignment Rules	7
Step 7. Export Account Territory Assignment Rule Items	7
Step 8. Export the Group object	8
Step 9. Export AccountShare records	8
Step 10. Export the Opportunity object	8
Step 11. Create new Sharing Rules to replace Sharing Rules that reference Territories	8
Step 12. Document all Reports that will be affected by the TM2 transition	9
Step 13. Log a Support ticket with Veeva Support	10
Step 14. Block End Users from Logging-in	11
Step 15. Create a Territory Type and Territory Model	11
Step 16. Territory1Id on the Territory2 object	12
Step 17. ParentTerritory1Id on the Territory2 object	12
Step 18. Move the Territory 1 object data into the Territory 2 object	12
Step 19. Extract the Territory 2 object and create a VLOOKUP for the ParentTerritory	13
Step 20. Load UserTerritory2Association	13
Step 21. Load Account Territory Assignment Rules	14
Step 22. Export Object Territory Assignment Rules	14
Step 23. Load the ObjectTerritory2AssignmentRuleItem object	15
Step 24. Update the ObjectTerritory2AssignmentRuleObject with the BooleanFields	15
Step 25. Upsert the AccountTerritoryAssignmentRule file	15
Step 26. Dataload Opportunities (See Step 10)	16



Step 27. Load the ObjectTerritory2Association	16
Step 28. Activate the Model	17
Step 29. Unblock Access to End Users	17
Step 30. Create Report Types and Reports	17
Scenario 2: Veeva CRM org with Veeva Align managing all Territories	18
Step 1. Create new Sharing Rules to replace Sharing Rules that reference Territories	18
Step 2. Document all Reports that will be affected by the TM2 transition	18
Step 3. Log a Support ticket with Veeva Support	18
Step 4. Block End Users from Logging-in	18
Step 5. Create a Master Align ID field on the Territory2 object	18
Step 6. Push to CRM	18
Step 7. Activate the Model	19
Step 8. Unblock Access to End Users	19
Step 9. Create Report Types and Reports	19
Scenario 3: Veeva CRM org with Veeva Align managing some Territories	20
Step 1. Export Territories from your TM1 org that are not managed by Align	20
Step 2. Relabel the Id column in the Territory csv file	20
Step 3. Export UserTerritory from your TM1 org	20
Step 4. Relabel the Id and TerritoryId columns in your UserTerritory csv file	20
Step 5. Determine if your company has custom Account Territory Assignment Rules	20
Step 6. Export Account Territory Assignment Rules	21
Step 7. Export Account Territory Assignment Rule Items	21
Step 8. Export the Group object	22
Step 9. Export AccountShare records	22
Step 10. Export the Opportunity object	22
Step 11. Create new Sharing Rules to replace Sharing Rules that reference Territories	23
Step 12. Document all Reports that will be affected by the TM2 transition	23
Step 13. Log a Support ticket with Veeva Support	24
Step 14. Block End Users from Logging-in	25
Step 15. Create a Master Align ID field on the Territory2 object	26
Step 16. Territory1Id on the Territory2 object	26
Step 17. ParentTerritory1Id on the Territory2 object	26
Step 18. Push from Align to CRM	27
Step 19. Copy the Territory Type and Territory Model	27
Step 20. Move the Territory 1 object data into the Territory 2 object	27
Step 21. Extract the Territory 2 object and create a VLOOKUP for the ParentTerritory	28



Step 22. Load UserTerritory2Association	28
Step 23. Load Account Territory Assignment Rules	29
Step 24. Export Object Territory Assignment Rules	29
Step 25. Load the ObjectTerritory2AssignmentRuleItem object	30
Step 26. Update the ObjectTerritory2AssignmentRuleObject with the BooleanFields	30
Step 27. Upsert the AccountTerritoryAssignmentRule file	31
Step 28. Dataload Opportunities (See Step 10)	31
Step 29. Load the ObjectTerritory2Association	31
Step 30. Activate the Model	32
Step 31. Unblock Access to End Users	32
Step 32. Create Report Types and Reports	33
Addendum 1: Template for Veeva CRM Support Ticket	34



Introduction

Salesforce has mandated that all Salesforce customers who use Territory Management 1.0 migrate to Territory Management 2.0 (also known as Enterprise Territory Management) by June of 2021. This document gives step-by-step instructions for the data migration part of the transition.

If you are new to Territory Management 2.0, then the video on the [Territory Management 2.0 Support page](#) provides an overview and introduction to the topic.

Before attempting to perform the data migration steps detailed in this document, please ensure that you have first remediated your Veeva CRM orgs. Details on remediation can be found in the “Gap Analysis” document on the [Territory Management 2.0 Support page](#).

Assumptions / Target Audience

This document assumes that the person or team who is migrating to TM2.0 has a working knowledge of Excel functions and Salesforce Data Loading.

Scenarios

Depending on your usage of Veeva CRM and Veeva Align, you will need to take different steps in order to migrate your data into the Territory Management 2.0 data model.

This document is split into 3 main sections, each one detailing the steps required to migrate data for the 3 possible org scenarios that exist:

1. Veeva CRM org where there is **no** integration with Veeva Align.
2. Veeva CRM org where Veeva Align manages **all** Territories in the org.
3. Veeva CRM org where Veeva Align manages **some** Territories in the org.

Best Practices

1. Veeva recommends keeping a backup of all the data exports.
2. Veeva recommends submitting the support ticket to enable TM2.0 at least 1 week prior to the intended migration window.



Scenario 1: Veeva CRM org with no Veeva Align integration

Step 1. Export Territories from your TM1 org

Export the Territory object into a csv file using the following SOQL:

```
SELECT AccountAccessLevel, CaseAccessLevel, Description, DeveloperName, Id, Name, OpportunityAccessLevel, ParentTerritoryId FROM Territory
```

Step 2. Relabel the Id column in the Territory csv file

Relabel the "Id" column header to "TerritoryId"

Step 3. Export UserTerritory from your TM1 org

Export the UserTerritory object into a csv file using the following SOQL:

```
Select Id, TerritoryId,UserId from UserTerritory
```

Step 4. Relabel the Id and TerritoryId columns in your UserTerritory csv file

Relabel the "Id" column header to be *UserTerritoryID*

Relabel the "TerritoryId" column header to be *RelatedTerritoryID*

Step 5. Determine if your company has custom Account Territory Assignment Rules

If your company uses the Veeva Account Territory Loader object to assign accounts to territories, then

- Query a count from Account Territory Assignment Rule (AccountTerritoryAssignmentRule) object
 - Run the following SOQL Query to get a count:
 - `SELECT count() FROM AccountTerritoryAssignmentRule`
- If there is a count of zero returned, then you can skip steps **6, 7, and 21 through 25**
- If there is a count of greater than zero returned, then proceed with steps **6 and 7**

If your company uses Veeva Territory utilities (based on the Zip2Terr object) to assign accounts to territories then

- Query a count from Account Territory Assignment Rule Items (AccountTerritoryAssignmentRuleItem) filtering by `WHERE Field != 'Account.Territory_vod__c'`
 - Run the following SOQL Query to get a count:
 - `SELECT count() FROM AccountTerritoryAssignmentRuleItem WHERE Field != 'Account.Territory_vod__c'`
- If there is no data in returned, then you can skip steps **6, 7, and 21 through 25**
- If there is data in this export, then proceed with steps **6 and 7**, removing the where clause



Step 6. Export Account Territory Assignment Rules

Only complete this step if you have Account Territory Assignment Rules (see step 5 above)

Export all data from Account Territory Assignment Rule (AccountTerritoryAssignmentRule) object using the following SOQL:

```
Select Id, BooleanFilter, IsActive, IsInherited, Name, TerritoryId from AccountTerritoryAssignmentRule
```

Add an extra column to the csv and name it *DeveloperName*.

Use the Name field to create the value for the DeveloperName field by replacing any spaces or dashes with underscores.

Example:

	A	B	C	D	E	F	G
1	<u>BOOLEANFILTER</u>	ID	<u>ISACTIVE</u>	<u>ISINHERITED</u>	NAME	TERRITORYID	<i>DeveloperName</i>
2	1 OR 2	0414C000000CagRQAS	true	true	T2 Test 1	04Tf40000004pbWEAQ	T2_Test_1
3	1 AND 2	0414C000000CagWQAS	true	true	T2 Test 2	04Tf40000004pbWEAQ	T2_Test_2

Step 7. Export Account Territory Assignment Rule Items

Only complete this step if you have Account Territory Assignment Rules (see step 5 above)

Export the data from the Account Territory Assignment Rule Item (AccountTerritoryAssignmentRuleItem) object using the following SOQL:

```
Select Id, Field, Operation, RuleId, SortOrder, Value from AccountTerritoryAssignmentRuleItem
```

Add an extra column to the csv:

- *RuleDeveloperName*

Each AccountTerritoryAssignmentRuleItem is linked to an AccountTerritoryAssignmentRule through the RuleId field (RuleId on RuleItem object = Id on Rule object). We want to populate the *RuleDeveloperName* column that we just created on the RuleItems csv file with the DeveloperNames that we just created on the Rule csv file.

Populate the *RuleDeveloperName* column with the *DeveloperName* from the AccountTerritoryAssignmentRule file by using a VLOOKUP that matches the Id of the AccountTerritoryAssignmentRule file to the RuleId of the AccountTerritoryAssignmentRuleItem.

Example:

	A	B	C	D	E	F	G
1	FIELD	ID	OPERATION	RULEID	<u>SORTORDER</u>	VALUE	<i>RuleDeveloperName</i>
2	Account.KOL_vod_c	0424C000000CbAbQAK	equals	0414C000000CagRQAS	0	1	T2_Test_1
3	PersonTitle	0424C000000CbAcQAK	notEqual	0414C000000CagRQAS	1		T2_Test_1
4	Account.Specialty_1_vod_c	0424C000000CbAgQAK	notEqual	0414C000000CagWQAS	0		T2_Test_2
5	Name	0424C000000CbAhQAK	notEqual	0414C000000CagWQAS	1		T2_Test_2



Step 8. Export the Group object

Export data from the Group object where the Type fields begins with 'Territory' (so that it will retrieve both Territory and TerritoryAndSubordinate Groups) using the following SOQL:

```
Select Id, DeveloperName,RelatedId,Type from Group where Type like 'Territory%'
```

Step 9. Export AccountShare records

Export data from the AccountShare object using the following SOQL:

```
Select Id, AccountAccessLevel, AccountId, CaseAccessLevel, ContactAccessLevel, OpportunityAccessLevel, RowCause,UserOrGroupId from AccountShare
```

The goal of this step is to remove all AccountShare records from this export file that are not associated with a territory. This is done by matching the AccountShare records with its associated Group records, and then determining if the Group is a reference to a territory.

Create a new worksheet in the AccountShare workbook and paste in the data from the Group object (Step 8)

Create a new column called *TerritoryName* on the AccountShare worksheet. Use a VLOOKUP to match the *UserOrGroupId* from the AccountShare worksheet to the *Id* from the Group worksheet. Populate the associated *DeveloperName* of the Group worksheet to be the *TerritoryName* of the AccountShare worksheet. It is expected for some rows to match, and for other rows to not match (and provide a value of N/A with the VLOOKUP).

Sort the AccountShares by TerritoryName, nulls last.

Remove all AccountShares that do not have a TerritoryName listed with them.

Step 10. Export the Opportunity object

Only for orgs that have Salesforce Sales or Service Cloud licenses

Export data from the Opportunity object filtering only on Opportunities that have a non-null Territory field using the following SOQL:

```
Select Id, Territory from Opportunity where Territory !=null
```

If no data is exported by the filtered query, then you can disregard all future steps that mention Opportunities

Step 11. Create new Sharing Rules to replace Sharing Rules that reference Territories

In TM2, Salesforce is removing the ability to share with "Territories" or "Territories and Subordinates" by means of Sharing Rules. The Veeva best practice is to have the Role Hierarchy exactly mirror the Territory Hierarchy. If your Role Hierarchy mirrors your Territory Hierarchy in this way, you will be able to create sharing rules that share with "Roles" or "Roles and Subordinates" that give the same result as Sharing Rules that shared with "Territories" or "Territories and Subordinates".

- Ensure that the Role Hierarchy mirrors the Territory Hierarchy exactly.



- Identify all Sharing Rules that are affected. **To make it easier on yourself, you can use the TM2 Assessment to view all the Sharing Rules that are affected by this transition.**
- If you want to check your affected sharing rules manually, go into “Sharing Settings” in setup and identify all Sharing Rules that have the following form:
 - **Criteria:** Owner in Territory: X
 - **Criteria:** Owner in Territory and Subordinates: Y
 - **Shared with:** Territory: X
 - **Shared with:** Territory: Y
- When all Sharing Rules have been identified, navigate to each Sharing Rule and document the Criteria, who the rule is Sharing With, and the Access Level
- Create new Sharing Rules that mirror the Territory rules by sharing with the equivalent “Role” or “Role and Subordinate” to the “Territory” or “Territory and Subordinate”
- Once you have reproduced all the necessary Role-based sharing rules, delete all of your Territory-based Sharing Rules

Step 12. Document all Reports that will be affected by the TM2 transition

Reports and Report Types that have a reference to the TM1 Territory will either disappear or be altered by the transition to TM2. View the matrix below to understand in which cases a report/report type will remain, disappear, or the Territory Information fields will disappear. To make it easier on yourself, you can use the TM2 Assessment to view all the Reports that are affected by this transition.

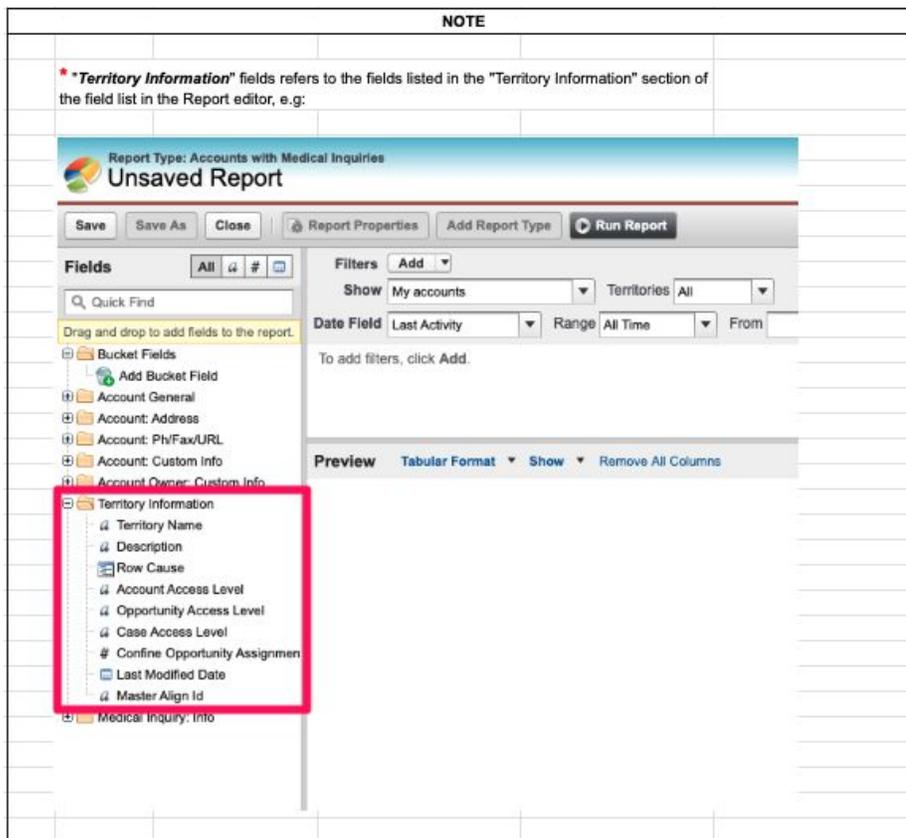
SCENARIO					EXPECTED BEHAVIOR AFTER TM2 TRANSITION	
#	Report Type	Report Type includes Territory Object	Primary Object in Report Type is Territory?	Report Utilizes “Territory Information” Fields? *	Report Types	Reports
1	Standard	Yes	Yes	Yes	Disappear	Disappear
2	Standard	Yes	No	Yes	Remain	“Territory Information” fields disappear from reports *
3	Standard	Yes	No	No	Remain	Remain the Same
4	Standard	No	N/A	Yes	Remain	“Territory Information” fields disappear from reports *
5	Standard	No	N/A	No	Remain	Remain the Same
6	Custom	Yes	Yes	Yes	When clicked, a “Data Not Available” error will display.	When clicked, an “Insufficient Privileges” error will display.
7	Custom	Yes	No	Yes	Territory object will disappear from Report Type	“Territories” fields disappear from reports.
8	Custom	No	N/A	N/A	Remain	Remain the Same

For TM2, there will be no easy way to migrate/reproduce these reports other than by recreating them manually. Because of this, Veeva strongly recommends scrutinizing all reports and removing ones that are obsolete or no longer used. You can create and run a report on your reports to check which reports have not been run in the previous six months. You can do this by using the Report filter “**Last Run** not equal to **LAST 6 MONTHS**”. Go through the resulting Reports and delete those that are not being used or are no longer relevant.

After deleting obsolete reports, go through all existing reports and determine which reports will be affected by the TM2 transition based on the TM2 Assessment and/or matrix above. Record the name, description, filters, time frame, objects being referenced, columns, and summary information. Also, go through all existing Dashboards / Dashboard components and determine



which are linked to a Report that is affected by the TM2 transition. Record the name and the descriptions of these dashboards components.



Step 13. Log a Support ticket with Veeva Support

Veeva recommends submitting the support ticket to enable TM2.0 at least 1 week prior to the intended migration window.

Log a support ticket with Veeva Support to enable Territory Management 2.0.

The support ticket must specify:

- The type of org
- The org ID
- The date and time of your planned cutover.

After raising the support ticket, Veeva Support is mandated to ask a series of questions to confirm that you understand the implications of your request.

To speed up this process, we have provided a template that you can optionally use for raising your support ticket. This template can be found in *Addendum 1* (located towards the end of this document).



When the ticket is resolved you will be able to enable Enterprise Territory Management (TM2) in your Veeva CRM org using the Setup menu.

Step 14. Block End Users from Logging-in

On the requested date for TM2.0 enablement (as specified in the previous step), end users should be blocked from logging into Veeva CRM until the completion of the data migration.

To do this, Salesforce recommends using its “Login Hours” feature. This enables you to control when each Profile is allowed to access CRM.

To access this feature, navigate to:

Setup > Manage Users > Profiles > *select a profile* > Login Hours

The login hours will need to be set for all Profiles with the exception of the Profile(s) assigned to the user(s) who are performing the TM2.0 data migration.

The following screenshot is an example that would prevent the users of the Profile from being able to login from 8pm Friday through to 8am Monday.

Profile Help for this Page ?

Primary Care Sales - Platform

Find Settings... | Clone Delete Edit Properties

Profile Overview > Login Hours

Login Hours Edit

Day	Start Time	End Time
Sunday	12:00 AM PDT	12:00 AM PDT
Monday	8:00 AM PDT	12:00 AM PDT
Tuesday	All Day	All Day
Wednesday	All Day	All Day
Thursday	All Day	All Day
Friday	12:00 AM PDT	8:00 PM PDT
Saturday	12:00 AM PDT	12:00 AM PDT

Step 15. Create a Territory Type and Territory Model

In your TM2-enabled org, create a Territory Model in the ‘Planning’ state. It does not matter what you name it, but we recommend that you include a version number and/or a date to the name or description.



Now, create a Territory Type. It also does not matter what you name it, nor will the priority natively drive any functionality, so we recommend to assign a priority of 1.

Copy the 18-digit Id of your Territory Type and Territory Model entries for use in the data loading stages below

For more information about Territory Type and Territory Model, please see the SFDC articles below:

- [Territory Type SFDC Article](#)
- [Territory Type Priority SFDC Article](#)
- [Territory Model SFDC Article](#)

Step 16. Territory1Id on the Territory2 object

Create a new text field on the Territory2 object and name it *Territory1Id* to hold the External Id of the original Territory object. Mark the field as an External Id and set it to be unique and case-insensitive. Make the length 18 characters.

Step 17. ParentTerritory1Id on the Territory2 object

Create a new text field on the Territory2 object and name it *ParentTerritory1Id*. This is not an External Id. Make the length 18 characters.

Step 18. Move the Territory 1 object data into the Territory 2 object

Update your Territory 1 csv file with two more columns: *TerritoryTypeId* and *TerritoryModelId*

Populate both of these columns with the ids you saved off in Step 15. **The TerritoryTypeId and TerritoryModelId will be the same for all rows.**

Load the data from the Territory extract file into the new Territory2 object using the following mapping:

Territory 1 file	Territory 2 object
AccountAccessLevel	AccountAccessLevel
CaseAccessLevel	CaseAccessLevel
Description	Description
TerritoryId	Territory1Id__c
ParentTerritoryId	ParentTerritory1Id__c
DeveloperName	DeveloperName
Name	Name



TerritoryTypeId	Territory2TypeId
TerritoryModelId	Territory2ModelId

Step 19. Extract the Territory 2 object and create a VLOOKUP for the ParentTerritory

Extract the Territory2 object you just loaded using the following SOQL:

```
Select Id, AccountAccessLevel, CaseAccessLevel, Description, Territory1Id__c,
ParentTerritory1Id__c, DeveloperName, Name, Territory2TypeId, Territory2ModelId
from Territory2
```

Update the extracted file to add a column *ParentTerritory2*.

Create a VLOOKUP to fill in the ParentTerritory2 column. Using the ParentTerritory1Id to match to the Territory1Id, populate the ParentTerritory2 column with the associated Id of the matched territory. Every row should have a ParentTerritory2 cell populated **except** for 1 row, which is the highest territory of the hierarchy.

Perform a data load of the Territory2 object to populate the ParentTerritoryId field.

Territory 2 transformed file	Territory 2 object
Id	Id
ParentTerritory2	ParentTerritory2

After this upsert is completed, you can check to see your progress so far. Within CRM, navigate to the Territory Model and click the “View Hierarchy” link. You can then click the “Expand All” link to view the entire hierarchy.

Step 20. Load UserTerritory2Association

In the UserTerritory extract csv:

- add a new column called *Territory2Id*
- add a new sheet to the workbook
- paste the Territory2 extract (Step 18) into the new sheet
- create a VLOOKUP to populate the *Territory2Id* column. Using the *TerritoryId* on the UserTerritory sheet to match to the *Territory1Id* on the Territory2 sheet, populate the *Territory2Id* with the associated *Id* of the matched territory.
- Data load the UserTerritory sheet to the UserTerritory2Association object using the following mapping:

UserTerritory File	UserTerritory2Association
Territory2Id	Territory2Id



UserId	UserId
--------	--------

Step 21. Load Account Territory Assignment Rules

Only complete this step if you have Account Territory Assignment Rules (see step 5)

In the Account Territories Assignment Rules extract:

- Make sure you have converted the Name to DeveloperName, replacing all the spaces and dashes with underscores
- Add a column named "ObjectType" and populate every row with the word "Account"
- Add a column named "Territory2ModelId" and populate every row with the 18-digit Id of the created Territory Model

Load the data from the AccountTerritoryAssignmentRule extract file into ObjectTerritory2AssignmentRule data loading file, matching the column headers as outlined in the table below.

AccountTerritoryAssignmentRule File	ObjectTerritory2AssignmentRule Object
DeveloperName	DeveloperName
IsActive	IsActive
Name	MasterLabel
ObjectType ("Account")	ObjectType
Territory2ModelId (see step 15)	Territory2ModelId

Note: the Boolean Filter is intentionally left out of the mapping for this step

Step 22. Export Object Territory Assignment Rules

Only complete this step if you have Account Territory Assignment Rules (see step 5)

Export the Object Territory Assignment Rules that you have just loaded using the following SOQL:

```
Select Id, DeveloperName, BooleanFilter from ObjectTerritory2AssignmentRule
```

In the Object Territory Assignment Rule extract csv:

- add a column called *Territory1RuleId*
- add a new sheet and paste the AccountTerritoryAssignmentRules you exported from step 6
- create a VLOOKUP to populate the *Territory1RuleId* column on sheet 1. Using the DeveloperName on sheet 1 to match to the DeveloperName on sheet 2, populate the *Territory1RuleId* on sheet 1 with the *Id* from sheet 2.



- create a VLOOKUP to populate the *BooleanFilter* column on sheet 1. Using the *DeveloperName* on sheet 1 to match to the *DeveloperName* on sheet 2, populate the *BooleanFilter* on sheet 1 with the associated *BooleanFilter* on sheet 2.

Step 23. Load the ObjectTerritory2AssignmentRuleItem object

Only complete this step if you have Account Territory Assignment Rules (see step 5)

Open your AccountTerritoryAssignmentRuleItem file

- add a new column: TerritoryAssignment2RuleId
- add a new sheet and paste sheet 1 from the Object Territory Assignment Rules you exported/created in the previous step.
- create a VLOOKUP to populate the TerritoryAssignment2RuleId column. Using the *RuleId* on sheet 1 to match to the *Territory1RuleId* on sheet 2, populate the *TerritoryAssignment2RuleId* on sheet 1 with the *Id* from sheet 2.

Load the AccountTerritoryAssignmentRuleItems into the ObjectTerritory2AssignmentRuleItem object

AccountTerritoryAssignmentRuleItems File	ObjectTerritory2AssignmentRuleItems Object
TerritoryAssignment2RuleId	RuleId
Field	Field
Operation	Operation
Value	Value
SortOrder	SortOrder

Step 24. Update the ObjectTerritory2AssignmentRuleObject with the BooleanFields

Only complete this step if you have Account Territory Assignment Rules (see step 5)

Use the extract/ file transformation from Step 22 to upsert to the ObjectTerritory2AssignmentRule object using the following mapping:

ObjectTerritoryAssignmentRule File	ObjectTerritory2AssignmentRule Object
Id	Id
BooleanFilter	BooleanFilter

Step 25. Upsert the AccountTerritoryAssignmentRule file

Only complete this step if you have Account Territory Assignment Rules (see step 5)

Open your AccountTerritoryAssignmentRule file that you edited in Step 21

- add a column *Territory2RuleId*



- add a sheet and paste the extract file from Step 22 into sheet 2
- create a VLOOKUP to populate the *Territory2RuleId* column. Using the *DeveloperName* on sheet 1 to match to the *DeveloperName* on sheet 2, populate the *Territory2RuleId* on sheet 1 with the associated *Id* on sheet 2.

Load the AccountTerritoryAssignmentRule file into the RuleTerritory2Association using the following mapping: *Note - you will need to select “Territory1Id__c” as the external ID field to use when matching your related objects*

AccountTerritoryAssignmentRule File	RuleTerritory2Association
Territory2RuleId	RuleId
TerritoryId	Territory2:Territory1Id__c
IsInherited	IsInherited

Step 26. Dataload Opportunities (See Step 10)

For orgs that have Sales Cloud or Service Cloud licenses only

Update the Opportunities using the Opportunity extract and the following field map:

Opportunity file	Opportunity object
Id	Id
Territory	Territory

Step 27. Load the ObjectTerritory2Association

Open the AccountShare file that was transformed in Step 9 (all rows should have a TerritoryName):

- Add a new column to the AccountShare tab and name it: AssociationCause
- Fill all values of the AssociationCause column with the string ‘Territory2Manual’
- Add a new sheet, Territory2, and paste in the contents of the Territory2 file (created in Step 19)
- Add a new column to the AccountShare tab and name it: Territory2Id
- create a VLOOKUP to populate the *Territory2Id* column. Using the *TerritoryName* on sheet 1 to match to the *DeveloperName* on sheet 2, populate the *Territory2Id* column on sheet 1 with the *Id* from sheet 2 (Territory2).

Insert the AccountShare file to the ObjectTerritory2Association object using the following mapping:



AccountShare file	ObjectTerritory2Association object
AccountId	ObjectId
AssociationCause	AssociationCause
Territory2Id	Territory2Id

Note: It is expected that you may get some errors when inserting with the error “duplicate value found: <unknown> duplicates values on record with id: <unknown>”. You can ignore these errors. This error is generated because there were previously two different account share records with the same account relating to the same territory, just with different row causes. Since you updated the account share export to set all the AssociationCauses to ‘Territory2Manual’, there became duplicative records.

Step 28. Activate the Model

Navigate to:

Setup > Manage Territories > Territory Models

Drill-down on the Planned Model that has been used for loading TM2.0 data into.

Click the “Activate” button.

Step 29. Unblock Access to End Users

Once the Model has been activated, end users can be allowed to login to the system once again.

It is important that the Login Hours restrictions that were setup earlier in this guide are reverted once the data migration has been completed, otherwise the login restrictions will continue to take effect on a weekly basis.

To revert the Login Hours restrictions, navigate to:

Setup > Manage Users > Profiles > *select a profile* > Login Hours

Step 30. Create Report Types and Reports

Create new Report Types as necessary to support any territory reports needed

Create any territory reports that are needed to replace those that were removed or made obsolete by the migration to TM2. Update the dashboard components to reference these newly created reports.



Scenario 2: Veeva CRM org with Veeva Align managing **all** Territories

Step 1. Create new Sharing Rules to replace Sharing Rules that reference Territories

Please refer to the corresponding section in Scenario 1.

Step 2. Document all Reports that will be affected by the TM2 transition

Please refer to the corresponding section in Scenario 1.

Step 3. Log a Support ticket with Veeva Support

Please refer to the corresponding section in Scenario 1.

Step 4. Block End Users from Logging-in

Please refer to the corresponding section in Scenario 1.

Step 5. Create a Master Align ID field on the Territory2 object

In your CRM org, navigate to:

Setup > Customize > Territories > Fields

Create a new custom field with the following attributes:

- Type: Text
- Field Label: Master Align Id
- Field Name: Master_Align_Id_vod
- Length: 36

Optional step:

With Territory Management 2.0, Align offers an additional feature which enables the mapping of *custom* fields between Align and Veeva CRM. More information on this feature can be found on the following Align help page:

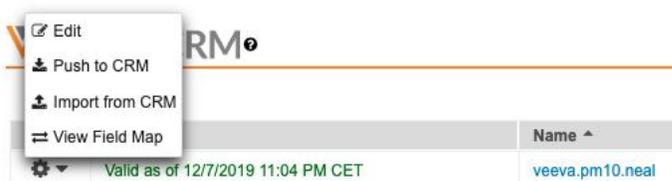
<https://alignhelp.veeva.com/doc/Content/Align/Features/AlignCRMIntegration.htm#Mapping>

Step 6. Push to CRM

In your Align org, navigate to:

Integrations > Align Integrations

On the gearwheel next to the CRM org, select “Push to CRM” and initiate the push:





Step 7. Activate the Model

Please refer to the corresponding section in Scenario 1.

Step 8. Unblock Access to End Users

Please refer to the corresponding section in Scenario 1.

Step 9. Create Report Types and Reports

Please refer to the corresponding section in Scenario 1.



Scenario 3: Veeva CRM org with Veeva Align managing **some** Territories

Step 1. Export Territories from your TM1 org that are *not* managed by Align

Export the Territory object into a csv file with the following filter:

```
Where Master_Align_Id_vod__c = null
```

Make sure to include these fields:

- AccountAccessLevel
- CaseAccessLevel
- Description
- DeveloperName
- Id
- Name
- OpportunityAccessLevel
- ParentTerritoryId

Step 2. Relabel the Id column in the Territory csv file

Relabel the “Id” column header to “TerritoryId”

Step 3. Export UserTerritory from your TM1 org

Export the UserTerritory object into a csv file using the following SOQL:

```
SELECT Id,TerritoryId,UserId FROM UserTerritory where TerritoryId in (select id from Territory where Master_Align_Id_vod__c = null)
```

Step 4. Relabel the Id and TerritoryId columns in your UserTerritory csv file

Relabel the “Id” column header to be *UserTerritoryID*

Relabel the “TerritoryId” column header to be *RelatedTerritoryID*

Step 5. Determine if your company has custom Account Territory Assignment Rules

If your company uses the Veeva Account Territory Loader object to assign accounts to territories, then

- Query a count from Account Territory Assignment Rule (AccountTerritoryAssignmentRule) object
 - Run the following SOQL Query to get a count:
 - `SELECT count() FROM AccountTerritoryAssignmentRule`
- If there is a count of zero returned, then you can skip steps **6, 7, and 23 through 27**
- If there is a count of greater than zero returned, then proceed with steps **6 and 7**

If your company uses Veeva Territory utilities (based on the Zip2Terr object) to assign accounts to territories then

- Query a count from Account Territory Assignment Rule Items (AccountTerritoryAssignmentRuleItem) filtering by `WHERE Field != 'Account.Territory_vod__c'`



- Run the following SOQL Query to get a count:

```
■ SELECT count() FROM AccountTerritoryAssignmentRuleItem WHERE
    Field != 'Account.Territory_vod__c'
```

- If there is no data in returned, then you can skip steps **6, 7, and 23 through 27**
- If there is data in this export, then proceed with steps **6 and 7**, removing the where clause

Step 6. Export Account Territory Assignment Rules

Only complete this step if you have Account Territory Assignment Rules (see step 5 above)

Export all data from Account Territory Assignment Rule (AccountTerritoryAssignmentRule) object using the following SOQL:

```
Select Id, BooleanFilter, IsActive, IsInherited, Name, TerritoryId from
AccountTerritoryAssignmentRule
```

Add an extra column to the csv and name it *DeveloperName*.

Use the Name field to create the value for the DeveloperName field by replacing any spaces or dashes with underscores.

Example:

	A	B	C	D	E	F	G
1	<u>BOOLEANFILTER</u>	ID	<u>ISACTIVE</u>	<u>ISINHERITED</u>	NAME	<u>TERRITORYID</u>	<i>DeveloperName</i>
2	1 OR 2	0414C000000CagRQAS	true	true	T2 Test 1	04Tf40000004pbWEAQ	T2_Test_1
3	1 AND 2	0414C000000CagWQAS	true	true	T2 Test 2	04Tf40000004pbWEAQ	T2_Test_2

Step 7. Export Account Territory Assignment Rule Items

Only complete this step if you have Account Territory Assignment Rules (see step 5 above)

Export the data from the Account Territory Assignment Rule Item (AccountTerritoryAssignmentRuleItem) object using the following SOQL:

```
Select Id, Field, Operation, RuleId, SortOrder, Value from
AccountTerritoryAssignmentRuleItem
```

Add an extra column to the csv:

- *RuleDeveloperName*

Each AccountTerritoryAssignmentRuleItem is linked to an AccountTerritoryAssignmentRule through the RuleId field (RuleId on RuleItem object = Id on Rule object). We want to populate the *RuleDeveloperName* column that we just created on the RuleItems csv file with the DeveloperNames that we just created on the Rule csv file.

Populate the *RuleDeveloperName* column with the *DeveloperName* from the AccountTerritoryAssignmentRule file by using a VLOOKUP that matches the Id of the AccountTerritoryAssignmentRule file to the RuleId of the AccountTerritoryAssignmentRuleItem.

Example:



	A	B	C	D	E	F	G
1	FIELD	ID	OPERATION	RULEID	<u>SORTORDER</u>	VALUE	<i>RuleDeveloperName</i>
2	Account.KOL_vod_c	0424C000000CbAbQAK	equals	0414C000000CagRQAS	0	1	T2_Test_1
3	PersonTitle	0424C000000CbAcQAK	notEqual	0414C000000CagRQAS	1		T2_Test_1
4	Account.Specialty_1_vod_c	0424C000000CbAgQAK	notEqual	0414C000000CagWQAS	0		T2_Test_2
5	Name	0424C000000CbAhQAK	notEqual	0414C000000CagWQAS	1		T2_Test_2

Step 8. Export the Group object

Export data from the Group object where the Type fields begins with 'Territory' using the following SOQL:

```
SELECT Id, DeveloperName, RelatedId, Type FROM Group where Type like 'Territory%' and RelatedId in (select id from Territory where Master_Align_Id_vod__c = null)
```

Step 9. Export AccountShare records

Export data from the AccountShare object using the following SOQL:

```
SELECT AccountAccessLevel, AccountId, CaseAccessLevel, ContactAccessLevel, Id, OpportunityAccessLevel, RowCause, UserOrGroupId FROM AccountShare where UserOrGroupId in (Select Id from Group where RelatedId != null)
```

The goal of this step is to remove all AccountShare records from this export file that are not associated with a territory. This is done by matching the AccountShare records with its associated Group records, and then determining if the Group is a reference to a territory.

Create a new worksheet in the AccountShare workbook and paste in the data from the Group object (Step 8)

Create a new column called *TerritoryName* on the AccountShare worksheet. Use a VLOOKUP to match the *UserOrGroupId* from the AccountShare worksheet to the *Id* from the Group worksheet. Populate the associated *DeveloperName* of the Group worksheet to be the *TerritoryName* of the AccountShare worksheet. It is expected for some rows to match, and for other rows to not match (and provide a value of N/A with the VLOOKUP).

Sort the AccountShares by *TerritoryName*, nulls last.

Remove all AccountShares that do not have a *TerritoryName* listed with them

Step 10. Export the Opportunity object

Only for orgs that have Salesforce Sales or Service Cloud licenses

Export data from the Opportunity object filtering only on Opportunities that have a non-null Territory field using the following SOQL:

```
Select Id, Territory from Opportunity where Territory !=null
```

If no data is exported by the filtered query, then you can disregard all future steps that mention Opportunities



Step 11. Create new Sharing Rules to replace Sharing Rules that reference Territories

In TM2, Salesforce is removing the ability to share with “Territories” or “Territories and Subordinates” by means of Sharing Rules. The Veeva best practice is to have the Role Hierarchy exactly mirror the Territory Hierarchy. If your Role Hierarchy mirrors your Territory Hierarchy in this way, you will be able to create sharing rules that share with “Roles” or “Roles and Subordinates” that give the same result as Sharing Rules that shared with “Territories” or “Territories and Subordinates”.

- Ensure that the Role Hierarchy mirrors the Territory Hierarchy exactly.
- Identify all Sharing Rules that are affected. **To make it easier on yourself, you can use the TM2 Assessment to view all the Sharing Rules that are affected by this transition.**
- If you want to check your affected sharing rules manually, go into “Sharing Settings” in setup and identify all Sharing Rules that have the following form:
 - **Criteria:** Owner in Territory: X
 - **Criteria:** Owner in Territory and Subordinates: Y
 - **Shared with:** Territory: X
 - **Shared with:** Territory: Y
- When all Sharing Rules have been identified, navigate to each Sharing Rule and document the Criteria, who the rule is Sharing With, and the Access Level
- Create new Sharing Rules that mirror the Territory rules by sharing with the equivalent “Role” or “Role and Subordinate” to the “Territory” or “Territory and Subordinate”
- Once you have reproduced all the necessary Role-based sharing rules, delete all of your Territory-based Sharing Rules

Step 12. Document all Reports that will be affected by the TM2 transition

Reports and Report Types that have a reference to the TM1 Territory will either disappear or be altered by the transition to TM2. View the matrix below to understand in which cases a report/report type will remain, disappear, or the Territory Information fields will disappear. To make it easier on yourself, you can use the TM2 Assessment to view all the Reports that are affected by this transition.

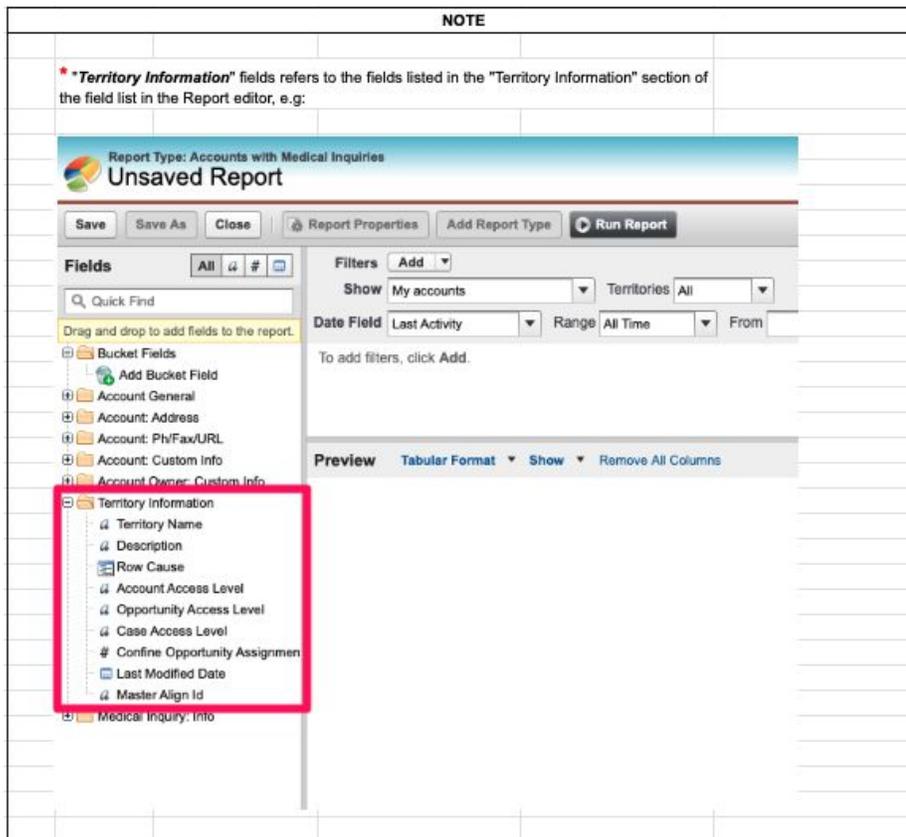
SCENARIO					EXPECTED BEHAVIOR AFTER TM2 TRANSITION	
#	Report Type	Report Type includes Territory Object	Primary Object in Report Type is Territory?	Report Utilizes “Territory Information” Fields? *	Report Types	Reports
1	Standard	Yes	Yes	Yes	Disappear	Disappear
2	Standard	Yes	No	Yes	Remain	“Territory Information” fields disappear from reports *
3	Standard	Yes	No	No	Remain	Remain the Same
4	Standard	No	N/A	Yes	Remain	“Territory Information” fields disappear from reports *
5	Standard	No	N/A	No	Remain	Remain the Same
6	Custom	Yes	Yes	Yes	When clicked, a “Data Not Available” error will display.	When clicked, an “Insufficient Privileges” error will display.
7	Custom	Yes	No	Yes	Territory object will disappear from Report Type	“Territories” fields disappear from reports.
8	Custom	No	N/A	N/A	Remain	Remain the Same

For TM2, there will be no easy way to migrate/reproduce these reports other than by recreating them manually. Because of this, Veeva strongly recommends scrutinizing all reports



and removing ones that are obsolete or no longer used. You can create and run a report on your reports to check which reports have not been run in the previous six months. You can do this by using the Report filter “**Last Run not equal to LAST 6 MONTHS**”. Go through the resulting Reports and delete those that are not being used or are no longer relevant.

After deleting obsolete reports, go through all existing reports and determine which reports will be affected by the TM2 transition based on the TM2 Assessment and/or matrix above. Record the name, description, filters, time frame, objects being referenced, columns, and summary information. Also, go through all existing Dashboards / Dashboard components and determine which are linked to a Report that is affected by the TM2 transition. Record the name and the descriptions of these dashboards components.



Step 13. Log a Support ticket with Veeva Support

Veeva recommends submitting the support ticket to enable TM2.0 at least 1 week prior to the intended migration window.

Log a support ticket with Veeva Support to enable Territory Management 2.0.

The support ticket must specify:

- The type of org
- The org ID
- The date and time of your planned cutover.



After raising the support ticket, Veeva Support is mandated to ask a series of questions to confirm that you understand the implications of your request.

To speed up this process, we have provided a template that you can optionally use for raising your support ticket. This template can be found in *Addendum 1* (located towards the end of this document).

When the ticket is resolved you will be able to enable Enterprise Territory Management (TM2) in your Veeva CRM org using the Setup menu.

Step 14. Block End Users from Logging-in

On the requested date for TM2.0 enablement (as specified in the previous step), end users should be blocked from logging into Veeva CRM until the completion of the data migration.

To do this, Salesforce recommends using its “Login Hours” feature. This enables you to control when each Profile is allowed to access CRM.

To access this feature, navigate to:

Setup > Manage Users > Profiles > *select a profile* > Login Hours

The login hours will need to be set for all Profiles **with the exception of the Profile(s) assigned to the user(s) who are performing the TM2.0 data migration.**

The following screenshot is an example that would prevent the users of the Profile from being able to login from 8pm Friday through to 8am Monday.

Find Settings... |

Profile Overview > **Login Hours**

Login Hours

Day	Start Time	End Time
Sunday	12:00 AM PDT	12:00 AM PDT
Monday	8:00 AM PDT	12:00 AM PDT
Tuesday	All Day	All Day
Wednesday	All Day	All Day
Thursday	All Day	All Day
Friday	12:00 AM PDT	8:00 PM PDT
Saturday	12:00 AM PDT	12:00 AM PDT

Step 15. Create a Master Align ID field on the Territory2 object

In your CRM org, navigate to:

Setup > Customize > Territories > Fields

Create a new custom field with the following attributes:

- Type: Text
- Field Label: Master Align Id
- Field Name: Master_Align_Id_vod
- Length: 36

Optional step:

With Territory Management 2.0, Align offers an additional feature which enables the mapping of *custom* fields between Align and Veeva CRM. More information on this feature can be found on the following Align help page:

<https://alignhelp.veeva.com/doc/Content/Align/Features/AlignCRMIntegration.htm#Mapping>

Step 16. Territory1Id on the Territory2 object

Create a new text field on the Territory2 object and name it Territory1Id to hold an external id of the original Territory object. Mark the field as an External Id and set it to Unique, case-insensitive. Make the length 18 characters.

Step 17. ParentTerritory1Id on the Territory2 object

Create a new text field on the Territory2 object and name it ParentTerritory1Id. This is **not** an External Id. Make the length 18 characters.

Step 18. Push from Align to CRM

In your Align org, navigate to:
Integrations > Align Integrations

On the gear wheel next to the CRM org, select “Push to CRM” and initiate the push:



Step 19. Copy the Territory Type and Territory Model

The push from Align in step 18 will create a Territory Type and Territory Model for you.

Copy the 18-digit Id of your Territory Type and Territory Model entries for use in the data loading stages below

For more information about Territory Type and Territory Model, please see the SFDC articles below:

- [Territory Type SFDC Article](#)
- [Territory Type Priority SFDC Article](#)
- [Territory Model SFDC Article](#)

Step 20. Move the Territory 1 object data into the Territory 2 object

Update your Territory 1 csv file with two more columns: *TerritoryTypeId* and *TerritoryModelId*

Populate both of these columns with the ids from Step 14 (same values for all rows)

Load the data from the Territory extract file into the new Territory2 object using the following mapping:

Territory 1 file	Territory 2 object
AccountAccessLevel	AccountAccessLevel
CaseAccessLevel	CaseAccessLevel
Description	Description
TerritoryId	Territory1Id
ParentTerritoryId	ParentTerritory1Id



DeveloperName	DeveloperName
Name	Name
TerritoryTypeId	Territory2TypeId
TerritoryModelId	Territory2ModelId

Step 21. Extract the Territory 2 object and create a VLOOKUP for the ParentTerritory

Extract the Territory2 object you just loaded using the following SOQL:

```
Select Id, AccountAccessLevel, CaseAccessLevel, Description, Territory1Id__c,
ParentTerritory1Id__c, DeveloperName, Name, Territory2TypeId, Territory2ModelId
from Territory2
```

Update the extracted file to add a column *ParentTerritory2*.

Create a VLOOKUP to fill in the ParentTerritory2 column. Using the ParentTerritory1Id to match to the Territory1Id, populate the ParentTerritory2 column with the associated Id of the matched territory. Every row should have a ParentTerritory2 cell populated **except** for 1 row, which is the highest territory of the hierarchy.

Perform an update data load of the Territory2 object to populate the ParentTerritoryId field

Territory 2 transformed file	Territory 2 object
Id	Id
ParentTerritory2	ParentTerritory2

Step 22. Load UserTerritory2Association

In the UserTerritory extract csv:

- add a new column called Territory2Id
- add a new sheet to the workbook
- paste the Territory2 extract (Step 21) into the new sheet
- create a VLOOKUP to populate the *Territory2Id* column. Using the *TerritoryId* on the UserTerritory sheet to match to the *Territory1Id* on the Territory2 sheet, populate the *Territory2Id* with the associated *Id* of the matched territory.
- Data load the UserTerritory sheet to the UserTerritory2Association object using the following mapping:

UserTerritory File	UserTerritory2Association
--------------------	---------------------------



Territory2Id	Territory2Id
UserId	UserId

Step 23. Load Account Territory Assignment Rules

Only complete this step if you have Account Territory Assignment Rules (see step 5)

In the Account Territories Assignment Rules extract:

- Make sure you have converted the Name to DeveloperName, replacing all the spaces and dashes with underscores
- Add a column named "ObjectType" and populate every row with the word "Account"
- Add a column named "Territory2ModelId" and populate every row with the 18-digit Id of the created Territory Model

Load the data from the AccountTerritoryAssignmentRule extract file into ObjectTerritory2AssignmentRule data loading file, matching the column headers as outlined in the table below.

AccountTerritoryAssignmentRule File	ObjectTerritory2AssignmentRule Object
DeveloperName	DeveloperName
IsActive	IsActive
Name	MasterLabel
ObjectType ("Account")	ObjectType
Territory2ModelId (see step 14)	Territory2ModelId

Note: the Boolean Filter is intentionally left out of the mapping for this step

Step 24. Export Object Territory Assignment Rules

Only complete this step if you have Account Territory Assignment Rules (see step 5)

Export the Object Territory Assignment Rules that you have just loaded using the following SOQL:

```
Select Id, DeveloperName, BooleanFilter from ObjectTerritory2AssignmentRule
```

In the Object Territory Assignment Rule extract csv:

- add a column called *Territory1RuleId*
- add a new sheet and paste the AccountTerritoryAssignmentRules you exported from step 6



- create a VLOOKUP to populate the *Territory1RuleId* column on sheet 1. Using the *DeveloperName* on sheet 1 to match to the *DeveloperName* on sheet 2, populate the *Territory1RuleId* on sheet 1 with the *Id* from sheet 2.
- create a VLOOKUP to populate the *BooleanFilter* column on sheet 1. Using the *DeveloperName* on sheet 1 to match to the *DeveloperName* on sheet 2, populate the *BooleanFilter* on sheet 1 with the associated *BooleanFilter* on sheet 2.

Step 25. Load the ObjectTerritory2AssignmentRuleItem object

Only complete this step if you have Account Territory Assignment Rules (see step 5)

Open your AccountTerritoryAssignmentRuleItem file

- add a new column: TerritoryAssignment2RuleId
- add a new sheet and paste sheet 1 from the Object Territory Assignment Rules you exported/created in the previous step.
- create a VLOOKUP to populate the TerritoryAssignment2RuleId column. Using the *RuleId* on sheet 1 to match to the *Territory1RuleId* on sheet 2, populate the *TerritoryAssignment2RuleId* on sheet 1 with the *Id* from sheet 2.

Load the AccountTerritoryAssignmentRuleItems into the ObjectTerritory2AssignmentRuleItem object

AccountTerritoryAssignmentRuleItems File	ObjectTerritory2AssignmentRuleItems Object
TerritoryAssignment2RuleId	RuleId
Field	Field
Operation	Operation
Value	Value
SortOrder	SortOrder

Step 26. Update the ObjectTerritory2AssignmentRuleObject with the BooleanFields

Only complete this step if you have Account Territory Assignment Rules (see step 5)

Use the extract/ file transformation from Step 24 to upsert to the ObjectTerritory2AssignmentRule object using the following mapping:

ObjectTerritoryAssignmentRule file	ObjectTerritoryAssignmentRule object
Id	Id
BooleanFilter	BooleanFilter



Step 27. Upsert the AccountTerritoryAssignmentRule file

Only complete this step if you have Account Territory Assignment Rules (see step 5)

Open your AccountTerritoryAssignmentRule file that you edited in Step 23

- add a column *Territory2RuleId*
- add a sheet and paste the extract file from Step 24 into sheet 2
- create a VLOOKUP to populate the *Territory2RuleId* column. Using the DeveloperName on sheet 1 to match to the DeveloperName on sheet 2, populate the *Territory2RuleId* on sheet 1 with the associated *Id* on sheet 2.

Load the AccountTerritoryAssignmentRule file into the RuleTerritory2Association using the following mapping: *Note - you will need to select "Territory1Id__c" as the external ID field to use when matching your related objects*

AccountTerritoryAssignmentRule File	RuleTerritory2Association
Territory2RuleId	RuleId
TerritoryId	Territory2:Territory1Id__c
IsInherited	IsInherited

Step 28. Dataload Opportunities (See Step 10)

For orgs that have Sales Cloud or Service Cloud licenses only

Update the Opportunities using the Opportunity extract and the following field map:

Opportunity file	Opportunity object
Id	Id
Territory	Territory

Step 29. Load the ObjectTerritory2Association

Open the AccountShare file that was transformed in Step 9 (all rows should have a TerritoryName):

- Add a new column to the AccountShare tab and name it: AssociationCause
- Fill all values of the AssociationCause column with the string 'Territory2Manual'
- Add a new sheet, Territory2, and paste in the contents of the Territory2 file (created in Step 21)
- Add a new column to the AccountShare tab and name it: Territory2Id



- create a VLOOKUP to populate the *Territory2Id* column. Using the *TerritoryName* on sheet 1 to match to the *DeveloperName* on sheet 2, populate the *Territory2Id* column on sheet 1 with the *Id* from sheet 2 (Territory2).

Insert the AccountShare file to the ObjectTerritory2Association object using the following mapping:

AccountShare file	ObjectTerritory2Association object
AccountId	ObjectId
SObjectType	SObjectType
AssociationCause	AssociationCause
Territory2Id	Territory2Id

Note: It is expected that you may get some errors when inserting with the error “duplicate value found: <unknown> duplicates values on record with id: <unknown>”. You can ignore these errors. This error is generated because there were previously two different account share records with the same account relating to the same territory, just with different row causes. Since you updated the account share export to set all the AssociationCauses to ‘Territory2Manual’, there became duplicative records.

Step 30. Activate the Model

Navigate to:

Setup > Manage Territories > Territory Models

Drill-down on the Planned Model that has been used for loading TM2.0 data into.

Click the “Activate” button.

Step 31. Unblock Access to End Users

Once the Model has been activated, end users can be allowed to login to the system once again.

It is important that the Login Hours restrictions that were setup earlier in this guide are reverted once the data migration has been completed, otherwise the login restrictions will continue to take effect on a weekly basis.

To revert the Login Hours restrictions, navigate to:



Setup > Manage Users > Profiles > *select a profile* > Login Hours

Step 32. Create Report Types and Reports

Create new Report Types as necessary to support any territory reports needed

Create any territory reports that are needed to replace those that were removed or made obsolete by the migration to TM2.



Addendum 1: Template for Veeva CRM Support Ticket

You can use the following template when raising your Veeva Support Ticket to enable Territory Management 2.0. Simply cut-and-paste the text below into your Veeva Support Ticket, and replace the highlighted text with your appropriate response.

I would like to migrate my org from TM1 to TM2.

This is a <Production/Full Sandbox/Development> Org.

The Org ID is: <Org ID>

I plan to block end users from accessing the Org so that I can begin the migration steps on MM-DD-YYYY at HH:MM AM/PM

- 1. Do you understand that you cannot use Customizable Forecasting in the specified organizations when Collaborative Forecasting is enabled? Yes/No*
- 2. Do you understand that Forecasting Overrides from Customizable Forecasting is purged and is not migrated to the new Collaborative Forecasting, and have you planned your cutover accordingly? Yes/No*
- 3. Do you understand that the Forecast History is purged and is not migrated to Collaborative Forecasting? (Not that you can export the "Forecast History" report and/or other Forecast reports prior to cutover.) Yes/No*
- 4. Do you understand that Quotas are purged and not migrated to Collaborative Forecasting? (Note that you can export "Quota vs. Actual" report prior to cutover.) Yes/No*
- 5. Do you understand that the Forecast Hierarchy is preserved, i.e. remain as it was prior to cutover? Yes/No*

The following questions are meant to acknowledge your understanding of the implications of disabling Territory Management. Please reply with confirmation of the following questions:

- 1. Do you understand users lose record access that is based on Territory assignments? Yes/No*
 - 2. Do you understand that your organization no longer has access to Territory management data? Yes/No*
-