# TerrAlign for Salesforce –Territory Alignment Integrated with CRM

TerrAlign for Salesforce is the first and only territory alignment solution for Salesforce users. Companies can employ TerrAlign's Sales Resource Optimization (SRO) technology to create efficient territory alignments and maximize their representatives' effectiveness.

TerrAlign for Salesforce includes all the territory design functionality and capabilities from core TerrAlign products along with modules specifically designed and developed to integrate with Salesforce. With TerrAlign for Salesforce, organizations can view their account data geographically, balance territories by opportunity or workload, and automatically update new assignments in Salesforce.
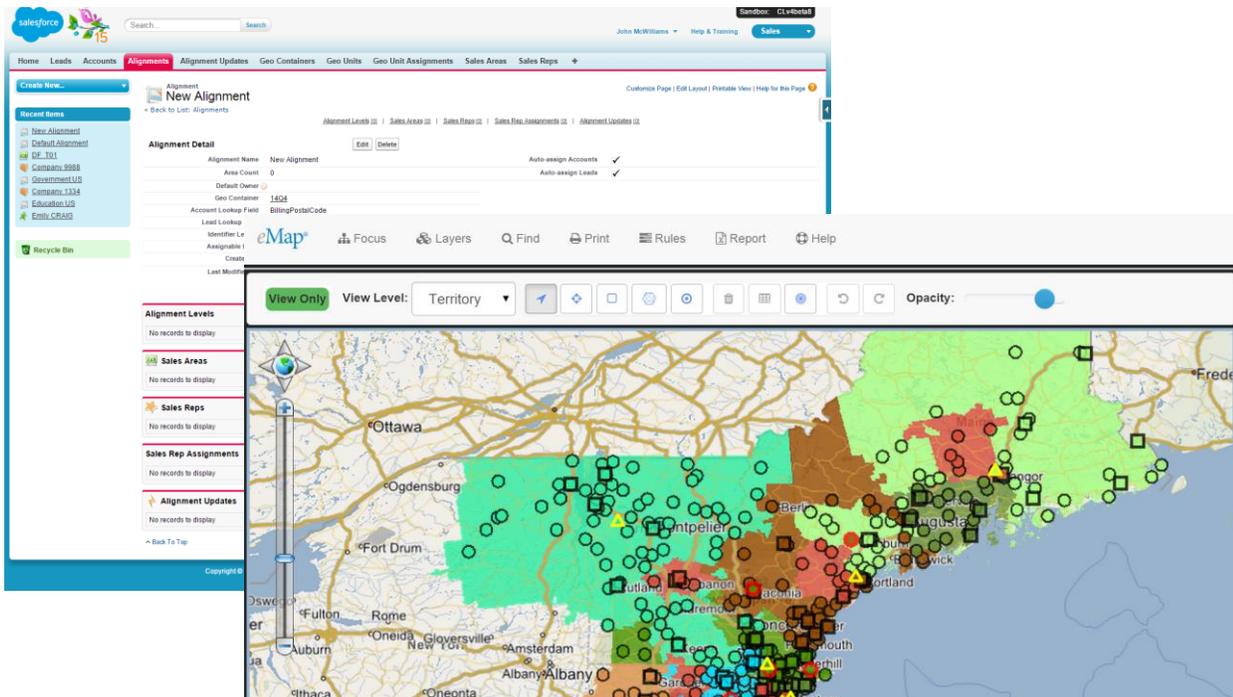
Select features

Territory optimization

Single sign-on from Salesforce

Out-of-the-box integration with Salesforce

View and modify account assignments

Works with Professional, Enterprise and Unlimited editions

Key benefits

Increase revenue and market share by maximizing your sales resources

Improve morale and motivation and reduce turnover by designing territories with equivalent opportunities

Communicate territory configurations to the field and modify alignments with maps and reports within Salesforce

Leverage existing Salesforce investment

Core TerrAlign for Salesforce Components

TerrAlign for Salesforce is comprised of three core components, each with its own set of features and benefits. The three areas are 1) moving data between Salesforce and TerrAlign, 2) managing Alignments in Salesforce, and 3) viewing eMap as a tab within Salesforce. Each are described below.

Data Extract and Upload

TerrAlign has created a tool called ClientLink to move data between Salesforce and TerrAlign 4. It is bi-directional, and based on Salesforce API's. It enables users to Extract entire Alignments, while keeping hierarchies and attributes of Account, Leads and Reps intact. After realignment work is complete, ClientLink is used to upload all critical Alignment data; Account Assignments, Geo Assignments and Rep Assignments. These are all loaded into our native Packaged App on the Salesforce platform.

Managing Alignments

As noted above, all assignment information is uploaded to Salesforce via ClientLink. Within our Packaged App, we have introduced the concept of an Alignment and created all the necessary Custom Objects; including, but not limited to Alignment, Sales Areas, Reps and Assignments for each of these, to manage and make territory assignments. Each Alignment can be configured to meet the needs of that particular sales team, having as many parent levels as needed. By creating a Rep object, we have abstracted the User from the territory or Sales Area, allowing a territory to stay fully intact when a rep leaves or changes position. Account and Reps can be assigned to multiple Alignments if being serviced by overlay reps or reps selling different products. Using our own Sales Area Hierarchy, we enable users to assign both Accounts and Leads to territories, overcoming the issue of what to do with Leads when using Salesforce TM Territories. Within our App, users can schedule when to make an Alignment active, so the work can be done, uploaded, submitted for approval if desired, and scheduled to take effect on any desired future date. In addition to assigning existing Accounts and Leads, the geo area (postcodes, etc…) to territory information uploaded can be leveraged to automatically assign new Accounts or Leads to the proper territory, thereby always having accurate assignments of all Accounts and Leads.

Viewing eMap™

In effort to make sales managers more efficient, we have enabled them to access eMap within Tab in Salesforce – one place for everything. Leveraging Salesforce's recommended Single Sign On approaches, we have made accessing, viewing and modifying territory assignments as easy as possible. Any changes they make to the Alignment are done so solely on the eMap servers. The power to modify assignments within Salesforce rests entirely, and centrally, with Admins and the TerrAlign 4 users.