Understanding Invoice Department and Team Member Assignment Logic

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This guide explains the assignment logic aACE uses for invoices. It is intended for general users.

When you create a new invoice record, aACE automatically assigns the department and Asgn To team member based on default assignment logic. These values are determined independently (e.g. the team member assignment does not rely on the department assignment).

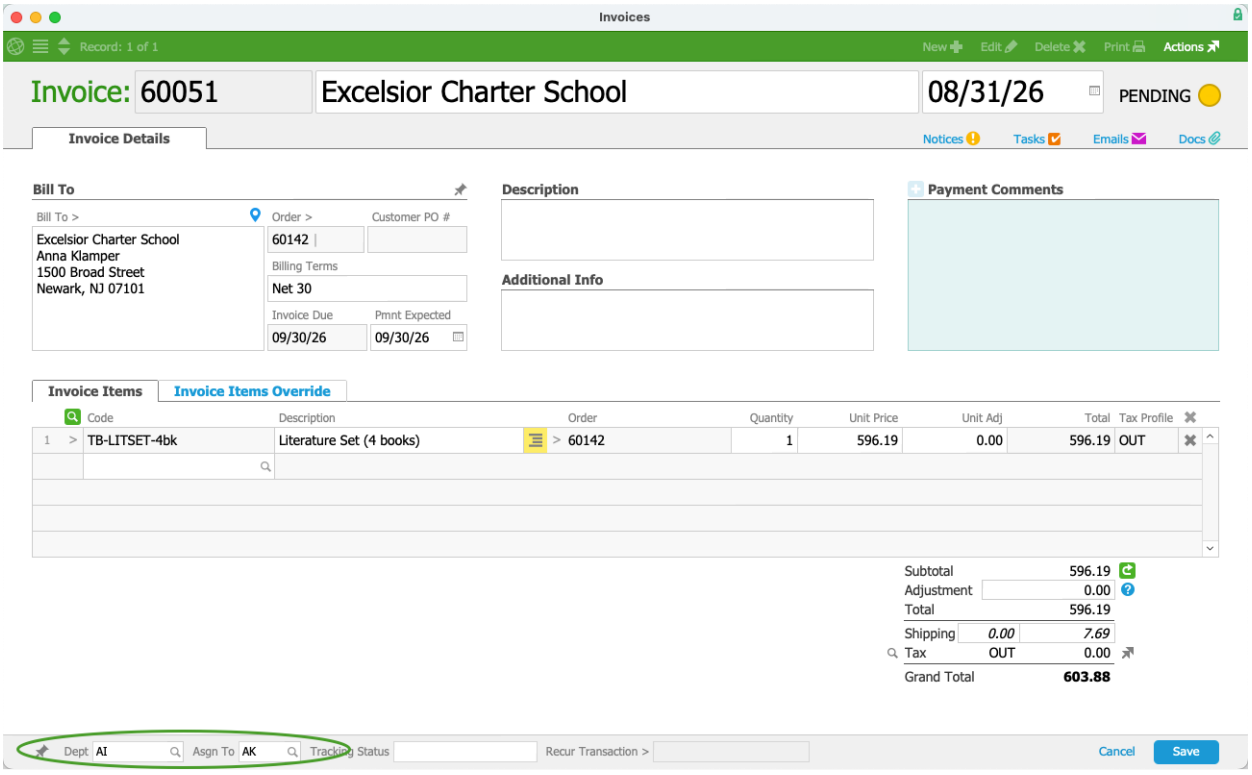


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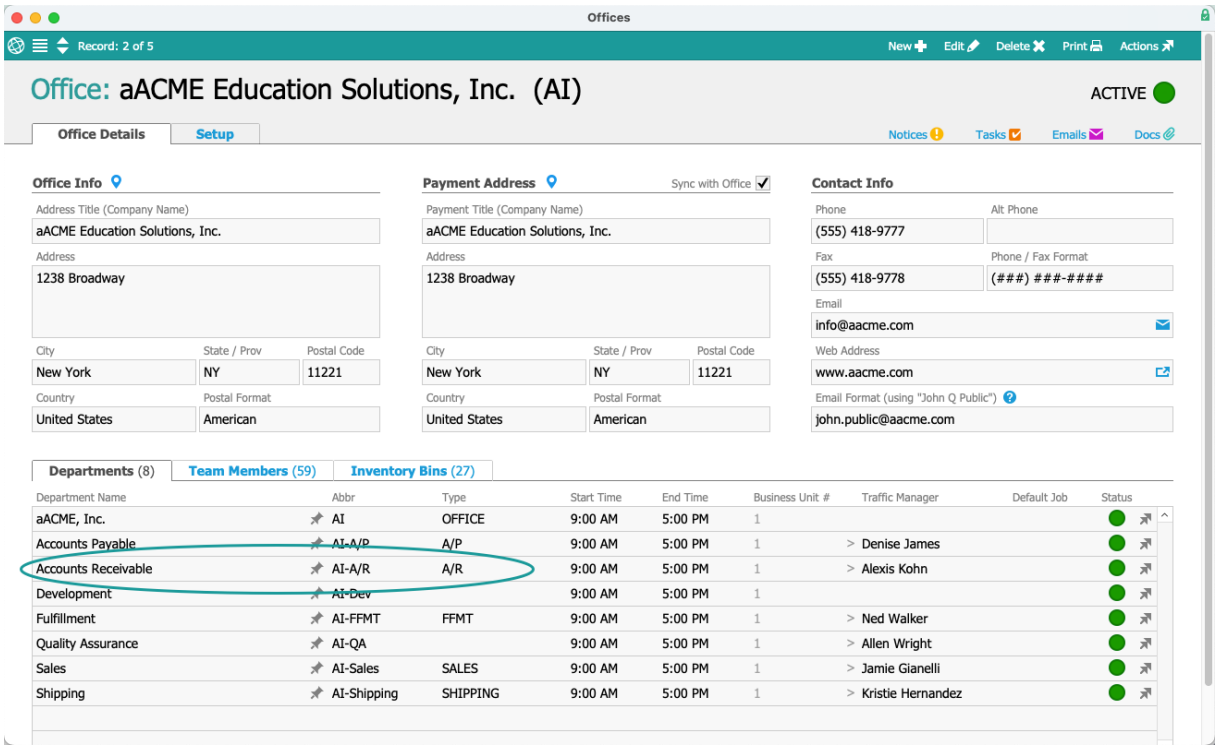
Understanding the Office and Department

Assignment

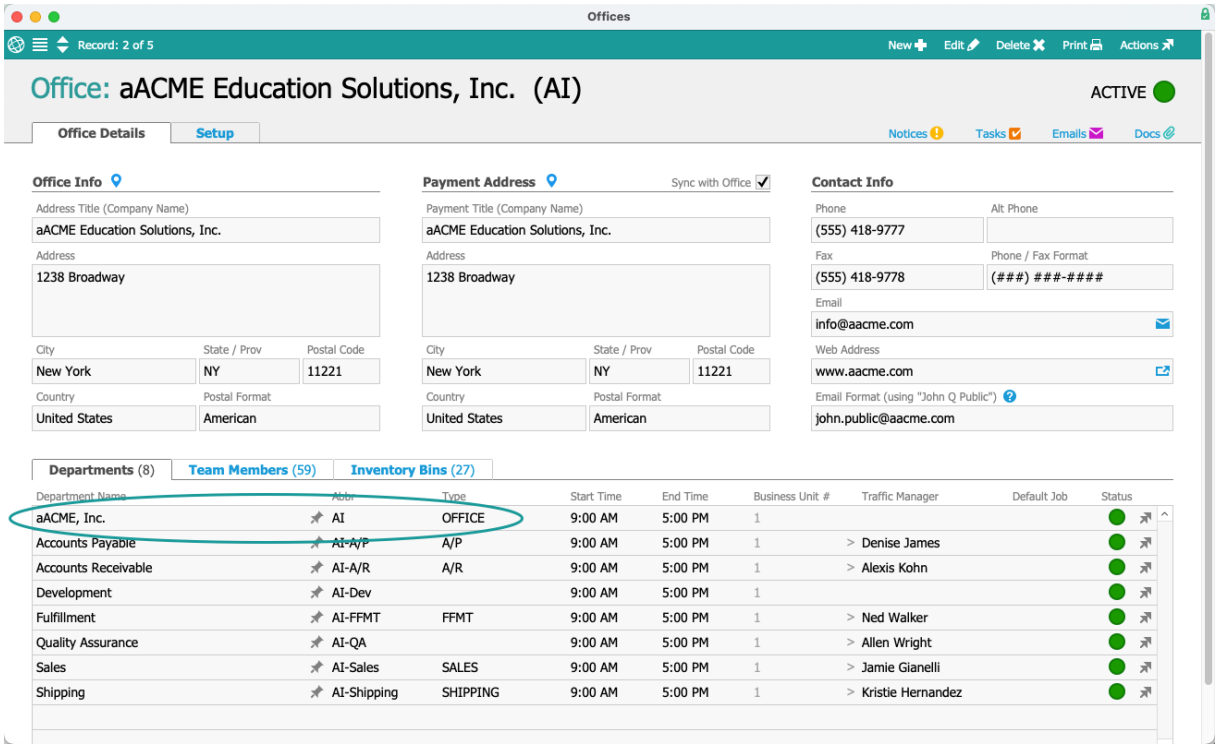
aACE first determines the office: if the invoice does not have an assigned office, then aACE uses the current user's office. When an invoice is automatically generated as part of an automation, then the invoice inherits the office from the transaction (e.g. order or shipment).

Then, aACE determines the department from the office. The department is chosen based on whether the information is present. If the department is not available, aACE continues until it finds one.

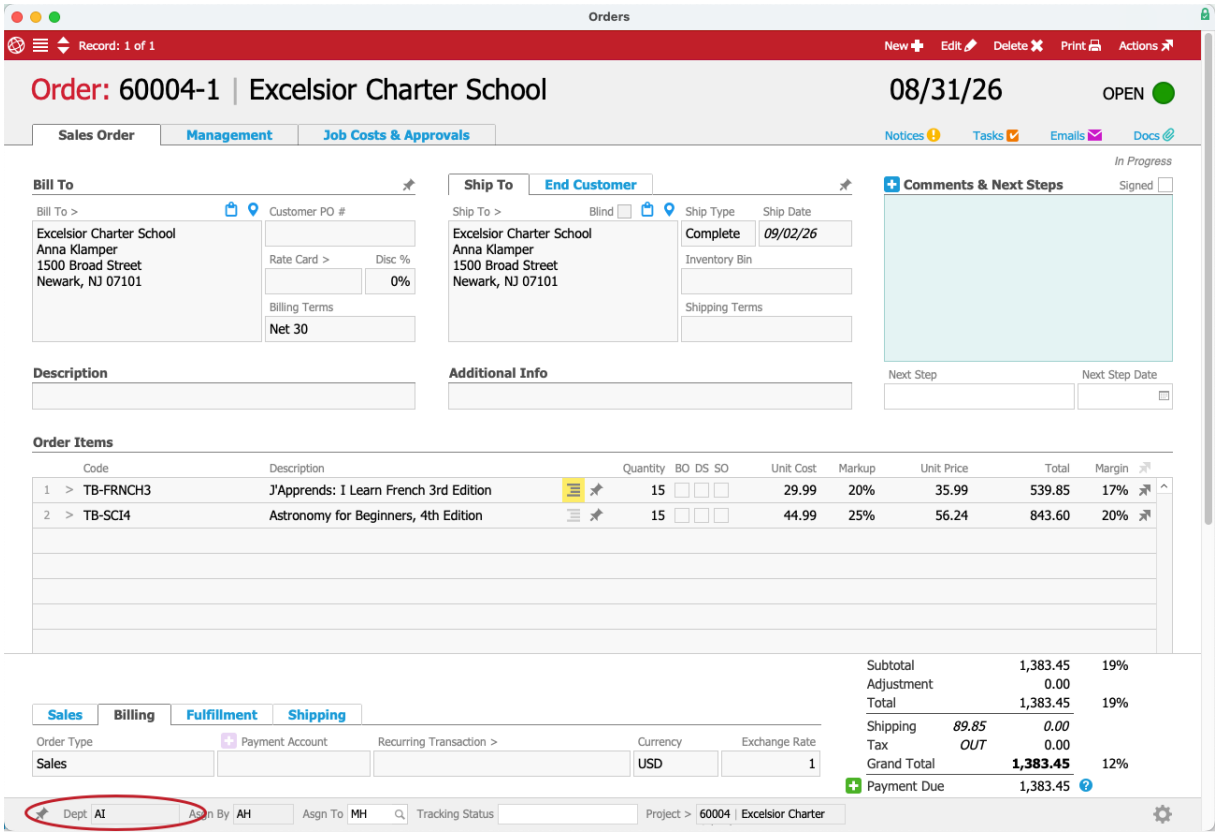
1. aACE first looks for the A/R department for the office.



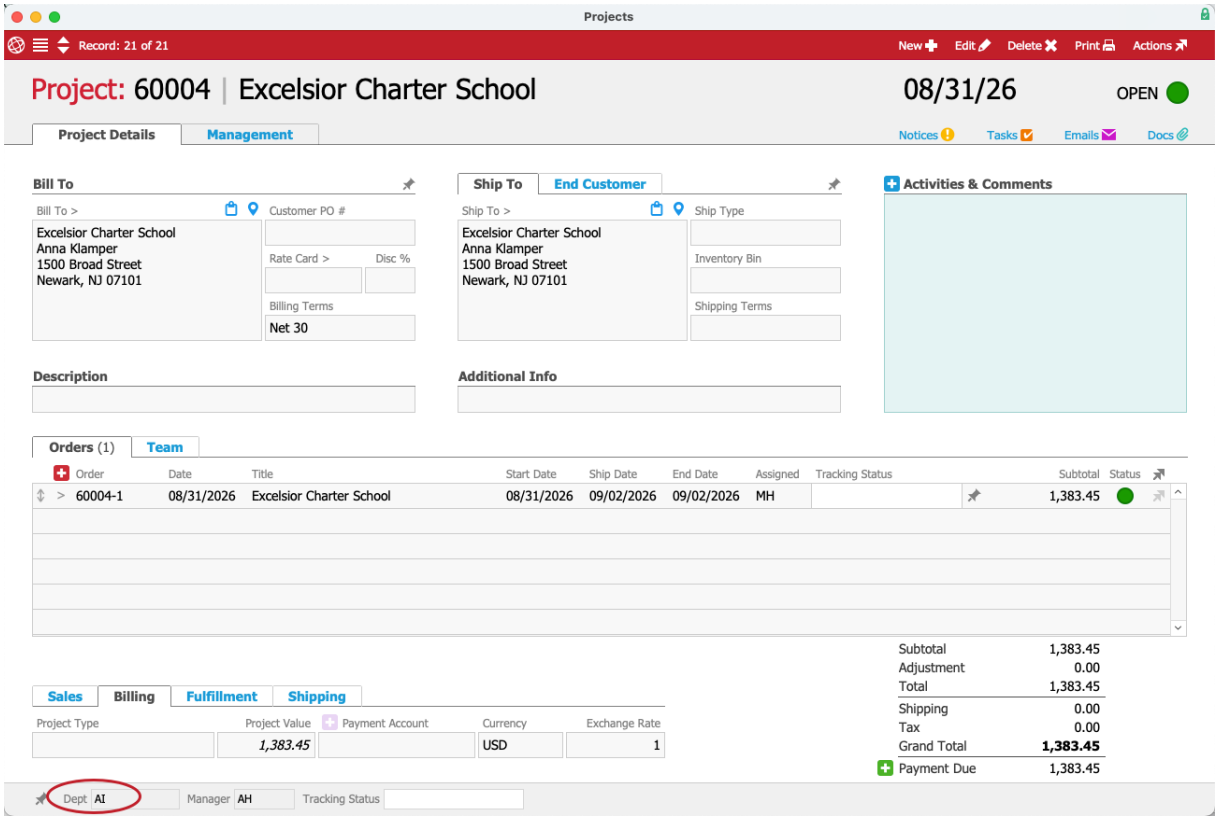
2. If there is no A/R department, aACE uses the office's default department. The default department is determined by the department with the Type as OFFICE.



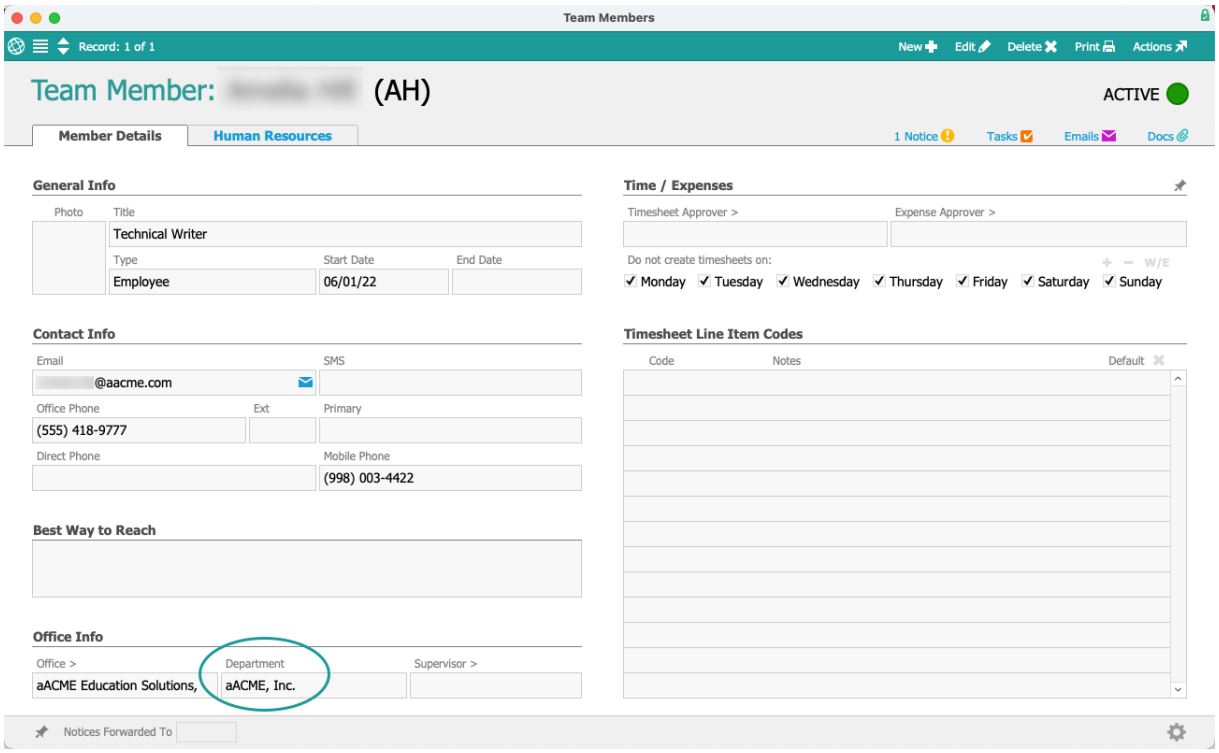
3. If there is no office, aACE uses the related order department.



4. If there is no related order department, aACE uses the related project department if applicable.



5. If none of these departments are available, aACE uses the current user's department.



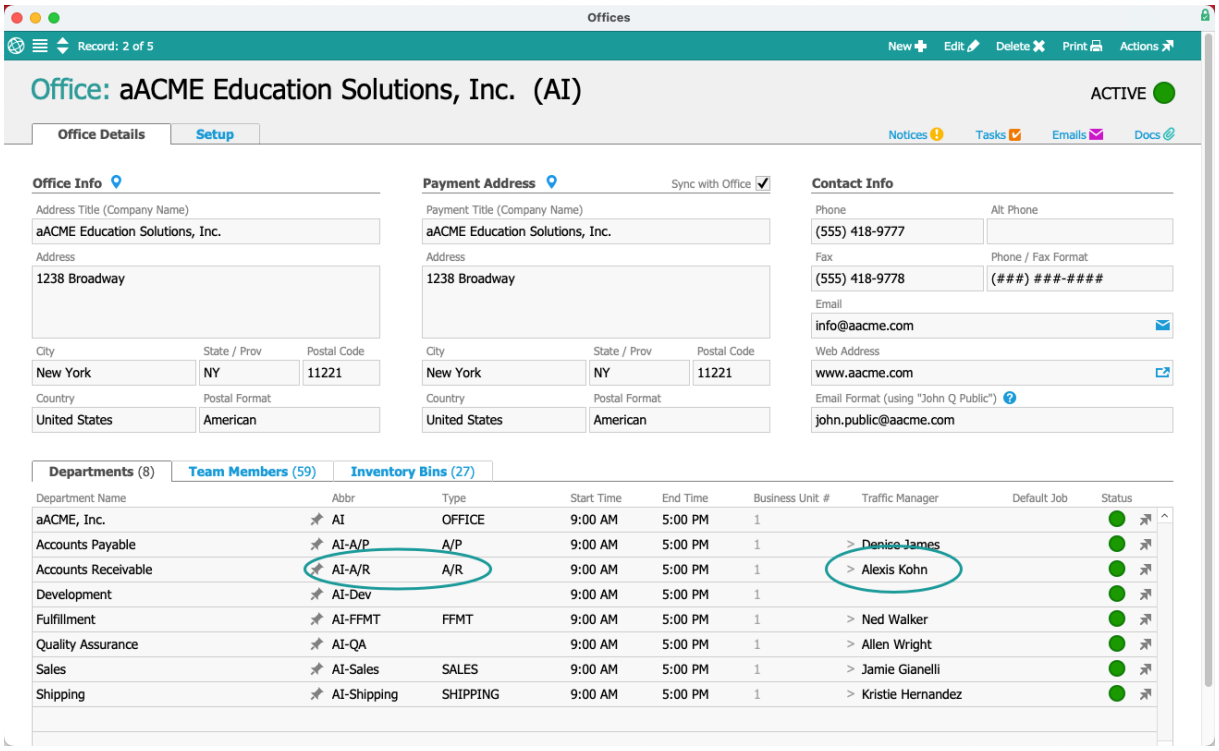
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Understanding the Team Member Assignment

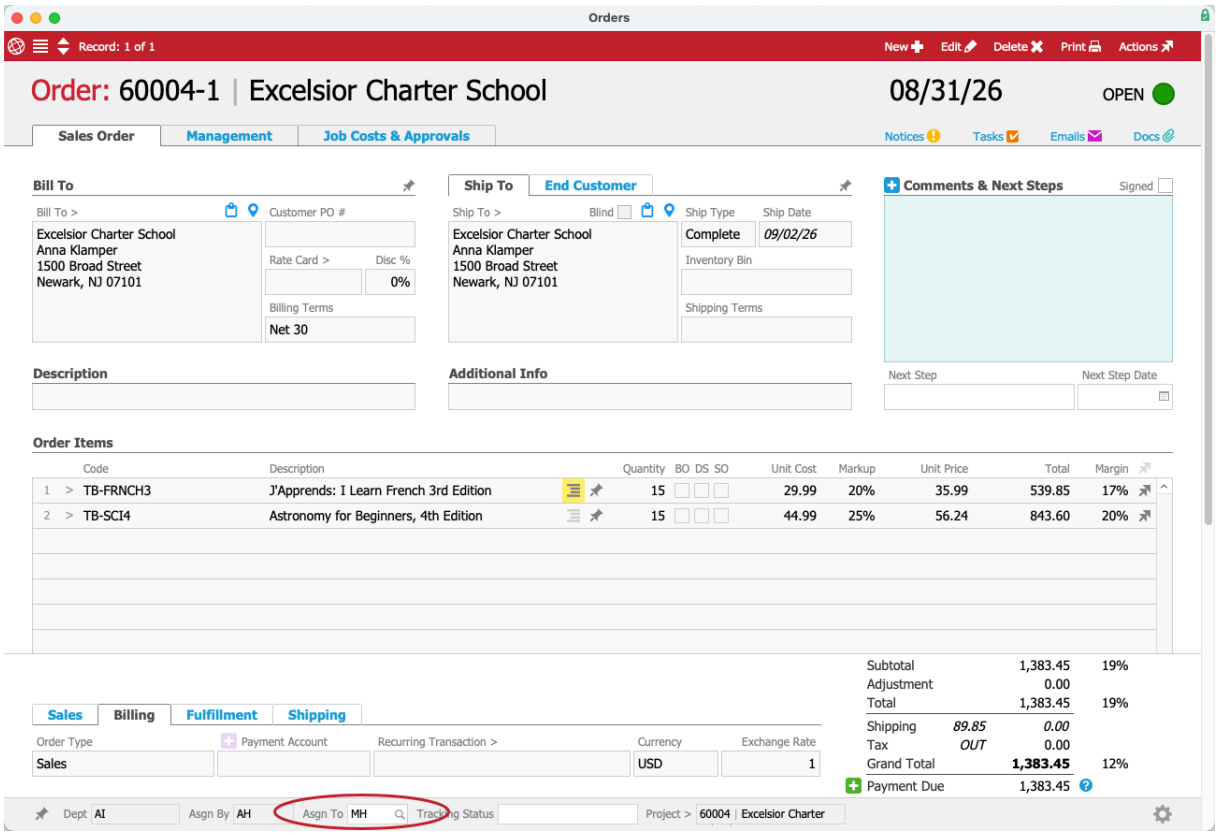
To determine the Assigned To team member assignment, aACE selects a team member

using the following logic:

1. aACE first looks to the invoice A/R department traffic manager.

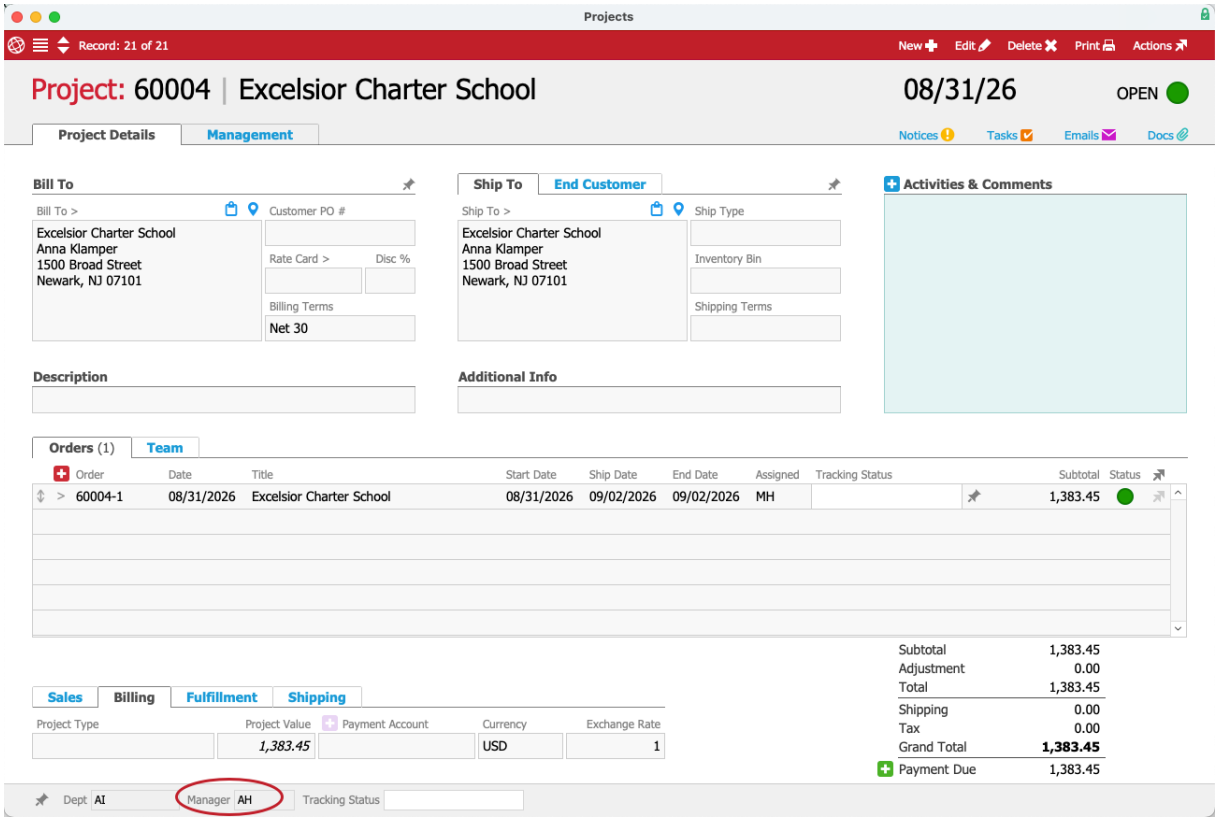


2. If the invoice A/R department does not have a traffic manager, then aACE uses the related order Asgn To team member.



3. If there is not a related order Asgn To team member, then aACE uses the related

project Manager team member if applicable.



4. If none of these team members are available, then aACE uses the current user.