

Understanding Lead Department and Team Member Assignment Logic

Last Modified on 09/01/2026 5:29 pm EDT

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

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

Leads

Record: 2 of 2

Lead: 60019 | Lewiston High School **09/01/26** **OPEN**

Lead Details **Quote Generation** 1 Notice Tasks Emails Docs

(Prospective) Customer

Customer (Bill To) > **Lewiston High School** Contact > **Ernest Chang** Phone **(207) 555-1354**

Sales Rep > **JG** Email **ernest.chang@lewiston.k12-aacedemo.edu**

Opportunity

Route **Email** Source **Existing Client** Campaign > Customer PO #

Type **Repeat Customer** Market Priority **Normal** Goal **8,000.00** Likely % **80%**

Est Close Date **10/01/26** Budget Authority Need

Comments & Next Steps

Next Step **Follow-up** Next Step Date **09/07/26**

Orders & Quotes (1) **Tasks** **Team**

Order	Title	Tracking Status	Est Cost	Total	Margin	Likely Amt	Status	Select
60149	Lewiston High School	Quote	7,998.50	9,998.50	20%	7,998.80	Yellow Circle	Checkmark

7,998.50 9,998.50 20% 7,998.80 100%

Dept: **AI** Asgn By: **AH** Asgn To: **JG** Q. Tracking Status

Understanding the Department Assignment

aACE determines the department by first using the department of the user creating the lead. If the department is not available (e.g. when aACE is automatically generating the lead), then aACE uses the department of the Assigned To team member.

Understanding the Assigned To 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 office sales department traffic manager.

The screenshot displays the 'Offices' management interface for 'aACME Education Solutions, Inc. (AI)'. The interface includes sections for Office Info, Payment Address, and Contact Info. Below these is a table of departments and their associated team members.

Department Name	Abbr	Type	Start Time	End Time	Business Unit #	Traffic Manager	Default Job	Status
aACME, Inc.	AI	OFFICE	9:00 AM	5:00 PM	1			ACTIVE
Accounts Payable	AI-A/P	A/P	9:00 AM	5:00 PM	1	> Denise James		ACTIVE
Accounts Receivable	AI-A/R	A/R	9:00 AM	5:00 PM	1	> Alexis Kohn		ACTIVE
Development	AI-Dev		9:00 AM	5:00 PM	1			ACTIVE
Fulfillment	AI-FFMT	FFMT	9:00 AM	5:00 PM	1	> Ned Walker		ACTIVE
Quality Assurance	AI-QA		9:00 AM	5:00 PM	1	> Allen Wright		ACTIVE
Sales	AI-Sales	SALES	9:00 AM	5:00 PM	1	> Jamie Gianelli		ACTIVE
Shipping	AI-Shipping	SHIPPING	9:00 AM	5:00 PM	1	> Kristie Hernandez		ACTIVE

2. If there is no sales department or the sales department does not have a traffic manager, aACE uses the traffic manager for the office's default department. The default department is determined by the department with the Type as OFFICE.

Offices

Record: 2 of 5

New + Edit ✎ Delete ✕ Print 🖨 Actions ⚙

Office: aACME Education Solutions, Inc. (AI) ACTIVE

Office Details **Setup** Notices 📢 Tasks 📅 Emails ✉ Docs 📄

Office Info

Address Title (Company Name)
aACME Education Solutions, Inc.

Address
1238 Broadway

City State / Prov Postal Code
New York NY 11221

Country Postal Format
United States American

Payment Address Sync with Office ☒

Payment Title (Company Name)
aACME Education Solutions, Inc.

Address
1238 Broadway

City State / Prov Postal Code
New York NY 11221

Country Postal Format
United States American

Contact Info

Phone Alt Phone
(555) 418-9777

Fax Phone / Fax Format
(555) 418-9778 (###) ###-####

Email
info@aacme.com

Web Address
www.aacme.com

Email Format (using "John Q Public")
john.public@aacme.com

Departments (8) **Team Members (59)** Inventory Bins (27)

Department Name	Abbr	Type	Start Time	End Time	Business Unit #	Traffic Manager	Default Job	Status
aACME, Inc.	AI	OFFICE	9:00 AM	5:00 PM	1			●
Accounts Payable	AI-A/P	A/P	9:00 AM	5:00 PM	1	> Denise James		●
Accounts Receivable	AI-A/R	A/R	9:00 AM	5:00 PM	1	> Alexis Kohn		●
Development	AI-Dev		9:00 AM	5:00 PM	1			●
Fulfillment	AI-FFMT	FFMT	9:00 AM	5:00 PM	1	> Ned Walker		●
Quality Assurance	AI-QA		9:00 AM	5:00 PM	1	> Allen Wright		●
Sales	AI-Sales	SALES	9:00 AM	5:00 PM	1	> Jamie Gianelli		●
Shipping	AI-Shipping	SHIPPING	9:00 AM	5:00 PM	1	> Kristie Hernandez		●

3. If the default department does not have a traffic manager, aACE uses the current user.

Understanding the Assigned By Team Member Assignment

aACE uses the current user creating the lead as the Assigned By team member assignment.

Understanding the Sales Rep Team Member Assignment

To determine the Sales Rep team member for the lead, aACE uses the Sales Rep team member in the Sales & Marketing tab on the Bill-To Company record.

Companies

Record: 1 of 1

New Edit Delete Print Actions

Company: Lewiston High School (50137)

ACTIVE

Company Details

Sales & Marketing

Customer Details

Vendor Details

Finance & Accounting

7 Notices

Tasks

Emails

Docs

Sales Info

Sales Rep >

Account Manager >

Territory

Customer Since

Last Order

Route

Source

Ref Comm Type

Ref Comm %

Jamie Gianelli

Mara Harvey

11/09/2020

12/03/2023

Phone

Referral

Related Activities

[Erin Nolan] I emailed this invoice to Ernest today. He is OOO for two weeks. [Activity]

> 2/10/23 5:49 pm

[Alexis Kohn] Ernest emailed me this week and said that the check was mailed. We should see it in the next few days. [Activity]

> 7/14/22 6:20 pm

[Alexis Kohn] I followed up with Ernest today and he is catching up after coming back from vacation. He said a check should be cut and mailed sometime next week. [Activity]

> 6/30/22 3:44 pm

Activities & Comments

[Mara Harvey] Sent customer appreciation postcard. [Activity]

4/8/22 3:53 pm

Martin Stroman ACTIVATED this company.

8/20/20 12:00 pm

Martin Stroman CREATED this company.

8/20/20 11:58 am

Leads (5)

Orders (14)

Recurring Transactions

Important Dates

Title

Priority

Goal

Likelihood

Est Close

Next Step

Next Step Date

Status

> Lewiston High School

Normal

8,000.00

80%

10/01/26

Follow-up

09/07/26

> Lewiston High School

Normal

0.00

10%

06/24/22

Finalize

06/24/22

> Lewiston High School

Normal

0.00

0%

05/20/22

Finalize

05/20/22

> Lewiston High School

Normal

0.00

25%

10/08/21

Finalize

10/08/21

> Lewiston High School

Normal

0.00

0%

05/14/21

Finalize

05/17/21