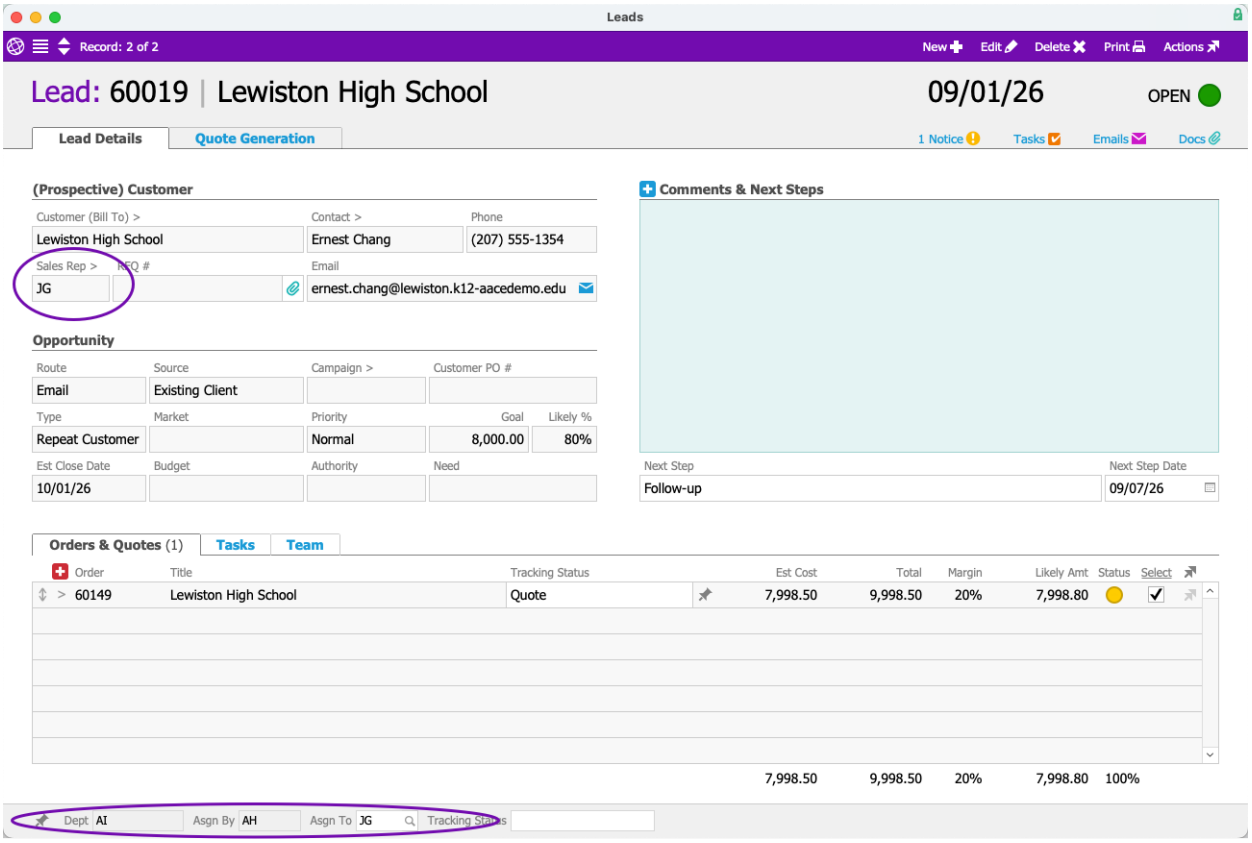
# Understanding Lead Department and Team Member Assignment Logic

Last Modified on 11/17/2026 5:20 pm EST

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).




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- Understanding the Assigned To Team Member Assignment
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- Understanding the Sales Rep Team Member Assignment

# Understanding the Department Assignment

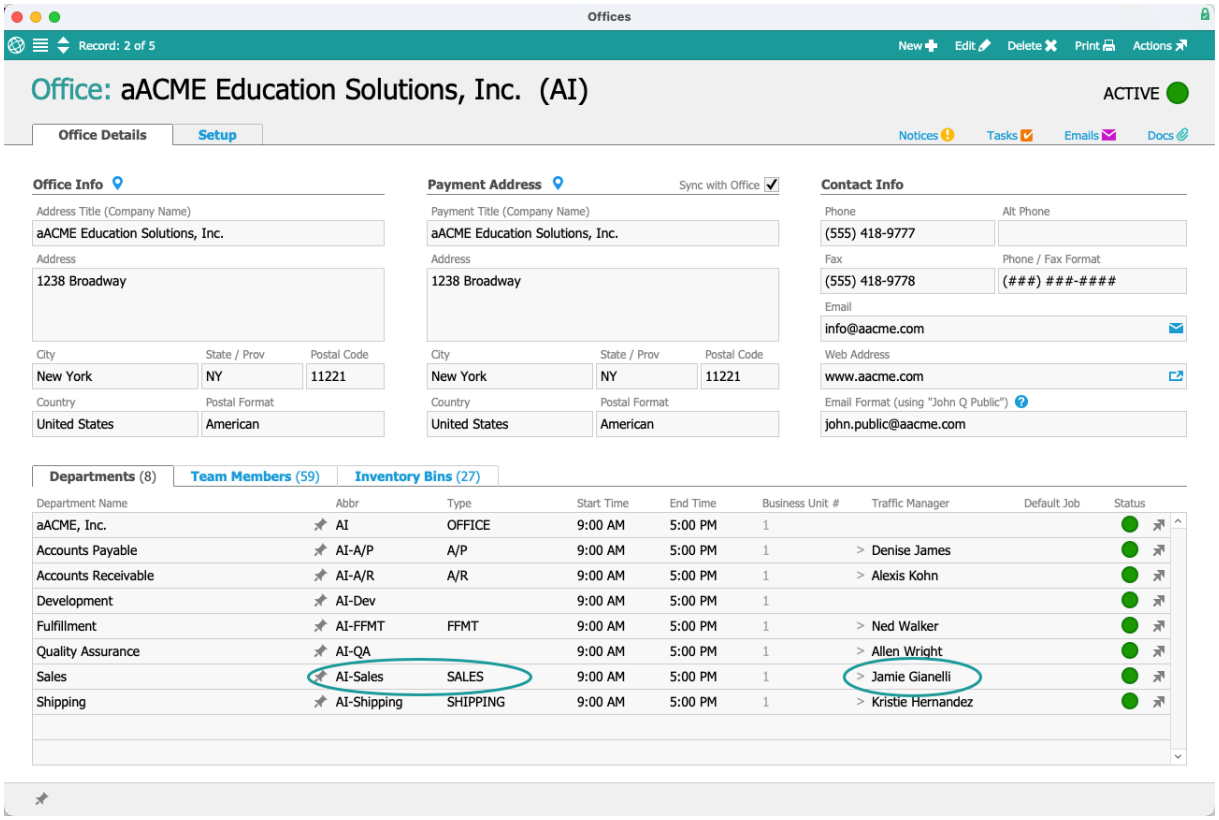
aACE determines the department by first using the department of the user creating the lead. If the department is not available (e.g. when aACE is automatically generating the lead), then aACE uses the department of the Assigned To team member.

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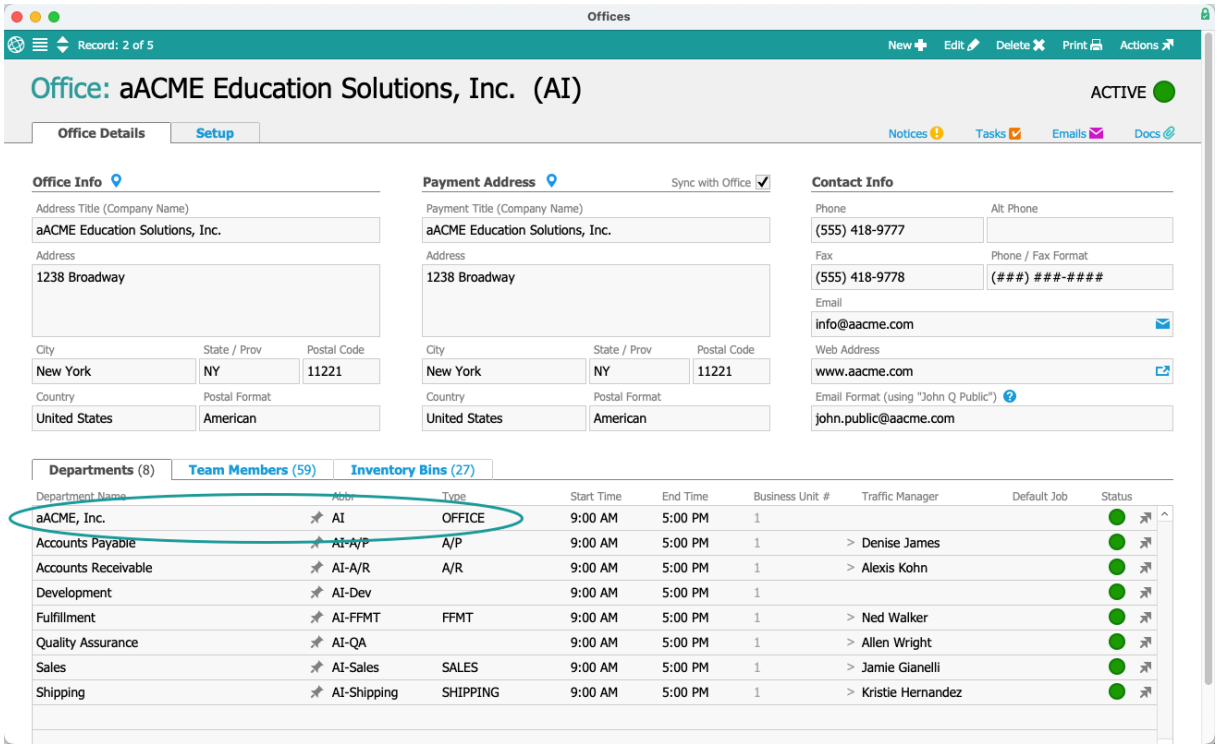
# Understanding the Assigned To Team Member Assignment

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.




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.




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

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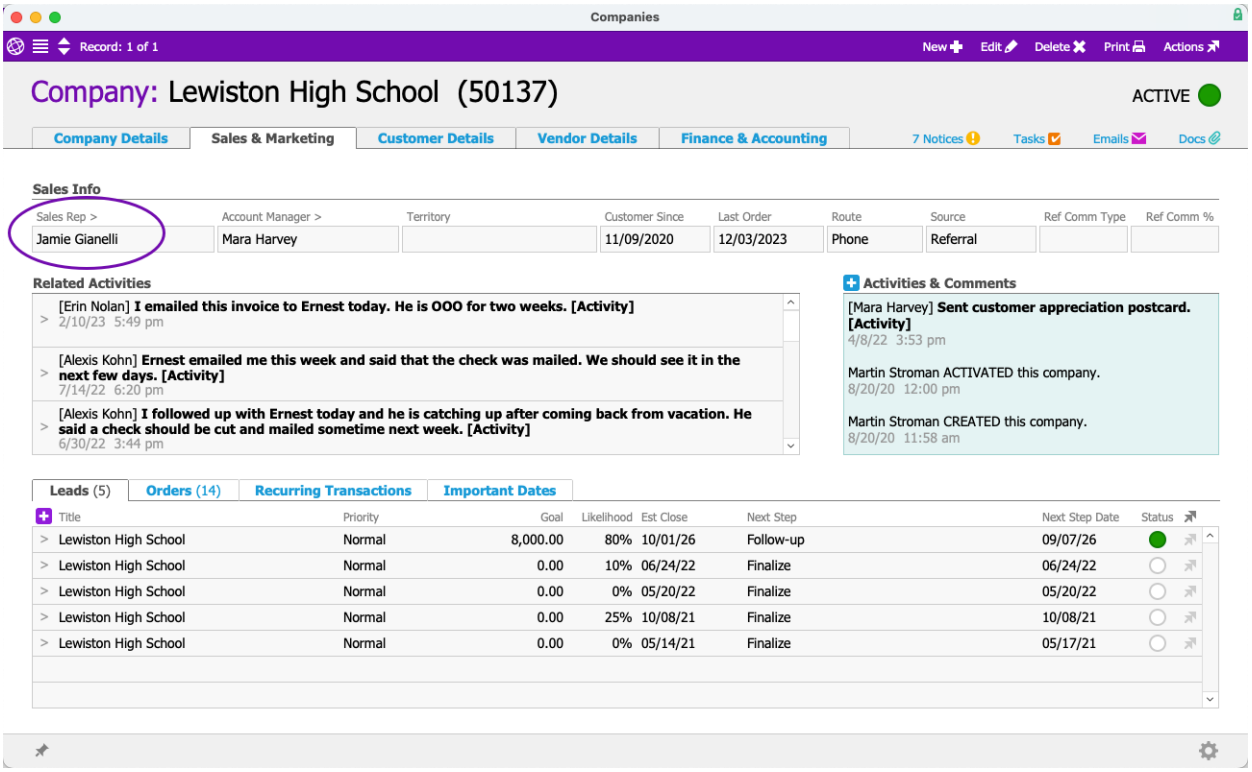
# Understanding the Assigned By Team Member Assignment

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

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# 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