Guide n°
UK2

Handy **guides**

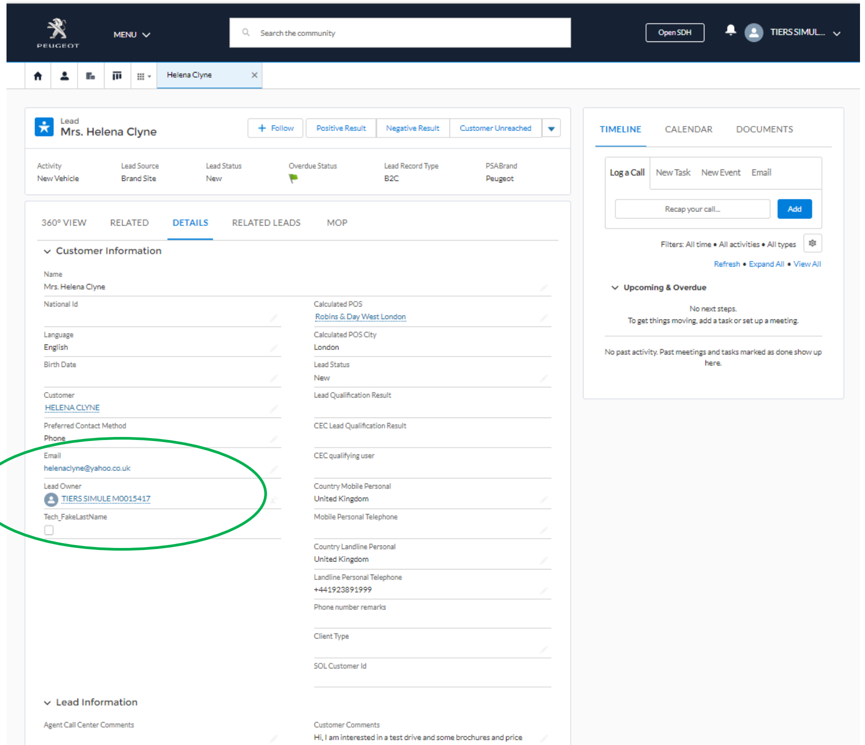
Lead Assignment Overview

Roles & Visibility

Understanding lead assignment and visibility

1 Lead Assignment

1. In order for a lead to be visible to the correct users in the retail network it **must** be assigned to one person as the 'OWNER'



In this case, the lead is assigned to a test user called TIERS SIMULE M0015417

2. The system will use the lead assignment rules in the system to select the person to assign the lead to.
   By default, the standard lead assignment rules have been applied which assign the lead to the Sales Manager listed on the retailer record in the system. This person has been selected randomly from the list of Sales Managers for each sites created from ADMP.
3. This does **NOT** mean that this is not the only person who can see the lead – it just means that the lead is 'owned' by someone to allow others at the site to see it.
4. Any Sales Manager, Aftersales Manager or BDC user with Lead Notifications set-up will receive a notification e.mail. These can be switched on/off in your settings at activity type level (E.g. You can choose to receive notifications for Sales leads ONLY). *See the Handy Guide on setting up Lead notifications for more info!*

Guide n°
UK2

2 Lead Visibility

Once a lead has an 'owner' and has been assigned to a site, it will be visible to people as follows:

- ALL people with a 'Sales Manager' or 'Aftersales Manager' role in Customer FIRST can see ALL leads (Sales and Aftersales) assigned to that site
- ALL people with the 'BDC User' role* in Customer FIRST can see ALL (Sales and Aftersales) assigned to the sites in their group
- People with the 'Sales Person' or 'Secretary' role will not see leads by default, they will only see leads which have been explicitly assigned to them.

Example

ABC cars Site 1	ABC cars Site 2	ABC cars Site 3
Primary Sales Manager: John Smith	Primary Sales Manager: Sue Jones	Primary Sales Manager: Bob White

- Users at the site(s):
  - John Smith and Charles Brown are Sales Managers at Site 1
  - Lisa Thompson is an Aftersales Manager at Site 1
  - David Howes is a Sales Person at Site 1
  - Sue Jones is a Sales Manager at Site 2
  - Bob White is a Sales Manager at Site 3
  - Sarah Sellers is a BDC user looking after the group

1. A **sales** lead comes into the system for Site 1:
   - ➢ It will be assigned to John Smith as the 'owner'
   - ➢ John Smith, Charles Brown, Lisa Thompson and Sarah Sellers will all be able to see and manage the lead when it comes in
2. Sarah Sellers picks up the lead and assigns it to David Howes by changing the owner.
   - ➢ It will now be assigned to David Howes as the 'owner'
   - ➢ John Smith, Charles Brown, Lisa Thompson, David Howes and Sarah Sellers will all be able to see the lead

Customer FIRST

*The role name in Customer FIRST is 'CEC_Dealer_Int_Partner'