

# 7. How to Automate Affiliate Hubs

Automating your affiliate hubs lets you route incoming clients to the right desks without manual intervention, ensuring timely follow-up, consistent SLA adherence, and clear ownership. You can choose a simple “all leads go here” approach, or build sophisticated rules based on the time of day or the source channel.

The **Automation** section allows you to set up automated client assignment to relevant desks.

To begin, **enable automation**:

1. **Open the Automation tab** within your affiliate hub.
2. **Toggle on Active automation** so it turns blue.

General Analytics Leads Configurations Sources **Automation**

Active automation:

Distribute leads by default

Project	Desk
new old test project	Select

Custom automation by:  Time  Source

Affiliate Hub Fallback

Affiliate Hub Fallback

Source new old test project Desk +

Save

“ **Tip:** Flip this switch off any time to pause automation and fall back to manual desk assignments.

Note: To disable automation, click the toggle again. If disabled, you will need to assign clients to desks manually. Instructions on manual assignment can be found [\[here\]](#).

**To automatically assign all new clients to one desk** (with no conditions):

1. In **Distribute leads by Default**→ Select Project and Desk from the dropdown.
2. Click **Save** to apply changes.

*All new leads will now land on that desk, straight out of the box.*

### To set up custom automation:

Use time-based rules when, for example, you have different support teams on different shifts.

1. Under **Custom automation by**, choose one of the options, **Time** or **Source**.

Note: You can choose automation based on either time or source, but not both simultaneously.

#### For custom automation **by time**:

1. Select the **Affiliate Hub Fallback** desk from the drop-down list. Clients that do not match within the specified time periods will be assigned here.
2. Set the **Start time** and **End time** to specify the time period. Then select the **Project** and **Desk** for that period from the drop-down list and click the plus icon (+).

Note: Time periods may overlap if entered that way (e.g., 8:00–14:00 and 6:00–16:00). In such cases, the first matching period in the list will be selected.

3. You can add an unlimited number of time periods to separate clients. A new line for adding a period will appear once you have added the previous one.
4. You can **edit** or **delete** all created periods by clicking the relevant icons.

#### For custom automation **by source**:

Route based on where the lead came from (e.g., “Twitter” vs. “Affiliate A”).

1. Select the **Affiliate Hub Fallback** desk from the drop-down list. Clients that do not match within the specified sources will be assigned here.
2. Select the **Source**, **Project**, and **Desk** from the drop-down lists. Then click the plus icon (+).
3. You can add as many sources as you have set up in [Configurations](#). A new line for adding a source will appear once you have added the previous one.
4. You can **edit** or **delete** all created sources by clicking the relevant icons.
5. Once your default desk, time windows, or source mappings are in place, click **Save** at the bottom of the panel. All new leads into this affiliate hub will immediately flow according to your rules.

By leveraging affiliate hub automation:

**Reduce manual work**—no more one-by-one desk assignments.

**Enforce SLAs**—ensure leads always land with the right team at the right time.

**Adapt on the fly**—update time windows or source mappings in seconds.

Automated routing keeps your pipeline moving smoothly, so your teams can focus on closing rather than chasing down new leads.

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