

Understanding Shipment Department and Team Member Assignment Logic

Last Modified on 09/03/2026 7:34 pm EDT

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

When you create a new lead record, aACE automatically assigns the department, Asgn To team member, and Asgn By 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).

The assignment logic for incoming, outgoing, and transfer shipments is the same.

The screenshot displays the 'Shipping Log' interface for a shipment with ID 60078, destined for Excelsior Charter School on 9/3/2026. The status is 'PENDING'. The interface is divided into several sections:

- Ship To:** Excelsior Charter School, Anna Klamper, 1500 Broad Street, Newark, NJ 07101. Shipment Type: Outgoing. Declared Value: 1,383.45.
- Shipment Info:** Carrier: FedEx, Carrier Service: FedEx Ground, Account #: 5021 8759 4. Delivery Date: 9/3/2026. Shipping Cost: 0.00.
- Description:** Fields for Trailer Number, BOL, Seal Number, Package Type, and Package IDs.
- Packing List:** A table listing items with columns for Code, Description, Order, Exp Qty, Quantity, Value, Weight, Shipping Cost, Bin, and Ref #.

	Code	Description	Order	Exp Qty	Quantity	Value	Weight	Shipping Cost	Bin	Ref #
1	TB-FRNCH3	J'Apprends: I Learn French 3rd	> 60004-1	15	15	539.85	22.5	0.00	WH-1A	#s
2	TB-SCI4	Astronomy for Beginners, 4th	> 60004-1	15	15	843.60	46.5	0.00	WH-1B	#s

At the bottom, the 'Dept' is set to 'AI-Shipping' and 'Asgn To' is set to 'KH'. The 'Tracking Status' is empty, and the 'Invoice' number is 60054.

Understanding the Department Assignment

aACE determines the department 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 shipping department for the shipment's office.

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
(555) 418-9777

Alt Phone

Fax
(555) 418-9778

Phone / Fax Format
(###) ###-####

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		

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

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.

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Team Members (59)

Inventory Bins (27)

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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 neither of these departments are available, aACE uses the current user's department.

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Record: 1 of 1

Team Members

New

Edit

Delete

Print

Actions

Team Member: (AH)

ACTIVE

Member Details

Human Resources

1 Notice

Tasks

Emails

Docs

General Info

Photo

Title

Technical Writer

Type

Start Date

End Date

Employee

06/01/22

Contact Info

Email

SMS

@aacme.com

Office Phone

Ext

Primary

(555) 418-9777

Direct Phone

Mobile Phone

(998) 003-4422

Best Way to Reach

Office Info

Office >

Department

Supervisor >

aACME Education Solutions,

aACME, Inc.

Time / Expenses

Timesheet Approver >

Expense Approver >

Do not create timesheets on:

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Timesheet Line Item Codes

Code

Notes

Default

Notices Forwarded To

Understanding the Assigned To Team Member Assignment

To determine the Assigned To team member assignment, aACE first looks to the shipping department traffic manager.

Offices

Record: 2 of 5

New + Edit Delete X 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 ☒

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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		

- If there is no shipping department or the shipping 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 shipment as the Assigned By team member assignment. The Assigned By field is only visible on transfer shipments. For incoming and outgoing shipments, aACE still stores this information, but it is not visible in the detail view.

