

# Using Task Groups with Templates

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This guide explains how to apply task groups to templates. It is intended for advanced users.

You can link a task group to an assembly line item code (LIC) and include that LIC on a template. When that template is used to build an order, it adds the assembly LIC to the order and creates a job which auto-generates the tasks from the task group.

This functionality is useful in a manufacturing setting where there are a series of well-defined steps needed to manufacture a particular product. It can also be leveraged to incorporate a series of sales tasks to be completed when a particular product is sold.

Configuring this setup includes four steps:

## 1. Create a Template

When you [build a template](https://aace6.knowledgeowl.com/help/building-a-template), it should include all the LICs that *might* be used for a certain type of order.

Later, when your team members [create an order from the template](https://aace6.knowledgeowl.com/help/using-templates-in-orders), they can remove any LICs that aren't included in the client's request.

## 2. Create a Task Group

Organize the task LICs to [create a 'checklist' of actions](https://aace6.knowledgeowl.com/help/creating-task-groups) that must be done.

## 3. Link the Task Group to an Assembly LIC

Create a new [assembly LIC](https://aace6.knowledgeowl.com/help/overview-of-line-item-codes#RecordInfoSection) record. On the new assembly LIC record's Bill of Materials tab, [specify the correct task group](https://aace6.knowledgeowl.com/help/linking-task-groups-to-assembly-line-item-codes).


Note: Because the template already includes the LICs that might be used for this type of order, you only need to link the task group record here.

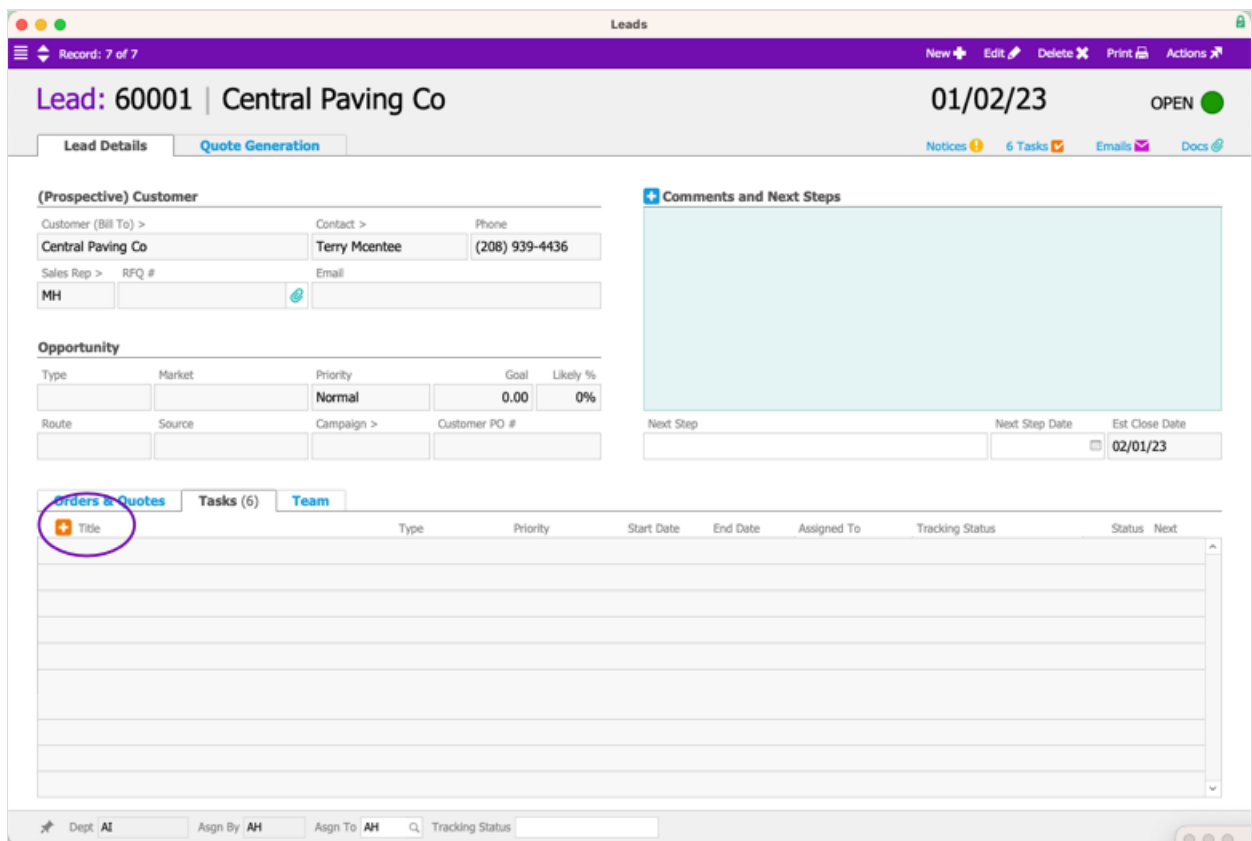
## 4. Add the Assembly LIC to the Template

1. Navigate from **Main Menu > Order Setup > Templates.**
2. Use the Quick Search bar to locate the desired template, then click **Edit.**
3. In the Items list, add the assembly LIC(s) and click **Save.**

Each time your team members use this template to build an order and open it, the task group will create a set of jobs for the order and open the first one. These jobs are displayed on the order's Production tab.

## Manually Adding a Task Group

You can also manually add tasks from a task group to a lead, order, or job. At the top of the Tasks tab, click Add (  ) > Tasks from Task Group > desired task group.



Orders and leads can have task groups automatically added to them when they are opened based on the record type.