Rescheduling Task Group Tasks

Last Modified on 02/13/2023 5:30 pm EST

This guide explains how to change the scheduling for a task linked to a production job. It is intended for advanced users.

The scheduling you set for a <u>new task group (https://aace6.knowledgeowl.com/help/creating-task-groups)</u> is an estimated standard, but events may arise where you need to adjust that schedule. You can edit a task schedule when:

- The order is in Open status
- The job is in Open status
- The task is linked to a job
- The task is in Incomplete or Pending status

Note: Tasks can be linked to records other than jobs (e.g. sales leads); however, the functionality described below is limited to tasks associated with production jobs.

Editing a Task Schedule

- 1. Navigate from Main Menu > Order Management > Orders.
- 2. Use the Quick Search bar to locate the desired order.
- 3. At the detail view, click **Management** > **Tasks & Preferences**.
- 4. In the Tasks list, locate the desired task and click the Go-To chevron (>).

•			Orders							
Record: 13 of 104					I	New 🕂 🛛 E	dit 🕭 🛛 Delete 🗙	Print é	à Act	ions 🬶
Order: 50501 Oueens	County Schoo	l District	5/13/2	022		05/1	3/22		OPE	N 🔴
	,		-,,-			,-	-,			
Sales Orde Management	Job Costs & Approvals					Notices 😣	2 Tasks 🔽	Emails	4 1	Docs (
Overview Invoicing Procurem	ent Fulfillment Shi	pping & Receivi	Tasks &	Preferences						
Title	Туре	Priority	Start Date	End Date	Assigned To	Tracking 5	Status		Status	
> Quality-check Shipment	Sales Process	Normal	07/01/22	07/01/22	Kristie Hernandez			*	•	7
> follow up with Olivia	Admin	Normal	07/05/22	07/05/22	Pete McNeil			*		${}^{\mu}\!$
~										
references										
ipping & Receiving										
Hold items until ship date. Note: Items can be ma	anually shipped.									

- 5. At the related task record, click **Edit**.
- 6. Enter the new Task Info dates and times.

			Tas	ks						
Record: 1 of 2							New 🖶 🛛 Edit 🖉	Polete 3	🕻 🛛 Print 🗟	Actions 2
Task: 60247	Qual	Quality-check Shipment						INCOMPLETE		
Standard Task							1 Notice 🔒	Tasks 🔽	Emails 🔛	Docs
Task Info		1 Related Reco	ord >	Customer						
Task Type	Priority	Assigned To		Customer >			Contact >			
Sales Process	Normal	Kristie Hernandez	Q,	Queens County	School District		Olivia Jackson			
Date Start Time St	art Date End	Time End		Direct Phone	Office Phone	Ext	Mobile Phone	Email		
				Task Budget (1						
				Task Budget (F	frs)	Burlow	Remain	Annh	/ Netros	
				Task Budget (F Code > Quality Assuranc	firs)	Budge	t Remain	Apply >> 1.5	Notes	
references	te. Sends the 'Assigned By' team	member a notice when task is ma	rked as comp	Task Budget (H Code > Quality Assurance	trs) ce Q	Budge 1.	Remain	Apph >> 1.5	/ Notes	Submit
references Notify assigner when comple Mark as incomplete on start. Generate purchase order who	te., Sends the 'Assigned By' team Marks task as incomplete when t tn incomplete. Generates a pur	member a notice when task is ma he task is scheduled to start. chase order when the task is mark	rked as comp ed as incomp	Task Budget (F Code > Quality Assurance elete or void.	trs) ce q	Budge 1.	t Remain	>> 1.5	/ Notes	Submit

7. Click Save.

If the rescheduled task has other tasks scheduled around it, those tasks will be autoupdated to maintain their anchoring. For example, if Task B is set to begin two weekdays after Task A ends, and you manually change the end date for Task A from Monday to Wednesday, then Task B will be auto-updated to begin on Friday.

Note: The scheduling defaults in aACE will ignore weekends. This means that on a Friday, a task set to begin "the next day" will actually start on Monday. Your system administrator can customize your business hours (Main Menu > System Admin > Preferences > My aACE).