Understanding Order, Production, and Standard Jobs

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This guide explains different types of jobs and their conditions for auto-generation. It is intended for advanced users.

Jobs are records used to manage the fulfillment of an order. They help you keep budgets, costs, procurement, and tasks located in one area. You can fit jobs into your organization's workflows even better using aACE automation from various job and system settings.

Types of Jobs

aACE provides three types of jobs to support your production needs.

Order Jobs

An <u>order job (https://aace6.knowledgeowl.com/help/overview-of-jobs#OrderJobs</u>) is the over-arching job created for fulfillment of the entire order. It is the 'parent' job for fulfillment. It holds all information regarding production for an order, including budget, cost summary, and any sub-jobs and tasks. An order job is *not* an order.

Different types of order records have different rules for generating order jobs:

- Production Orders Always create an order job
- Service Orders Always create an order job
- Sales Orders Create an order job only if an item on the order generates a production job

Production Jobs

A <u>production job</u> (https://aace6.knowledgeowl.com/help/overview-of-jobs#ProductionJobs)</u> is the 'child' job of an order job. Production jobs must be completed before related shipments can be made and before the related order job can be closed.

These jobs are identified with a number affixed at the end of their record ID (i.e. JOB10000.1).

aACE automatically generates a production job in two situations:

- An assembly item LIC occupies the root level (i.e. is *not* indented under another item) of *any* order
- An inventoried assembly item LIC occupies the root level of a production order

This is required because otherwise there would not be a logical place to apply costs (i.e. time and materials). Tasks for a production job will not populate until the job is opened. However, your system administrator can flag the preference to 'Auto-open production jobs' (see below) to have aACE open the job automatically.

Sub-Assembly Jobs

A <u>sub-assembly job (https://aace6.knowledgeowl.com/help/overview-of-jobs#ProductionJobs)</u> is a specific type of production job. Sub-assembly jobs must be produced or assembled before the final product can be completed.

These jobs are identified with a doubled affix at the end of their record ID (e.g. JOB10000.1.1).

aACE generates a sub-assembly job when an assembly or inventoried assembly LIC occupies a sub-level (i.e. is indented under another item). To place an LIC this way, you must use Options functionality.

Disabling Sub-Assembly Jobs

You can prevent aACE from automatically creating sub-assembly jobs for specific LICs.

- 1. Navigate to the Line Item Codes module and locate the desired LIC.
- 2. At the detail view, click the Setup tab, then click Edit.
- 3. In the Preferences section, mark the flag 'Do not create a sub-assembly job'.

Assembly Item	P Video Production						Notices	Tasks 🔽	Emails M	TVE
	Setup						Notices	Tasks 🛃	Emais M	Docs g
Accounting Setup		Commissions and Rate Setup				Unit Info				
Revenue Account >	Cost Account >	Rate Type	Rate Value		Price	Prd Case Qty	UOM	UPC	HTS	
4003 Service Sales	5001 Uncategorized Cost	Margin %	50%	v	1,260.00					
	Department >	Comm Type	Comm Value	VCS	Commission	Sale Case Qty	UOM	GTIN	ECCN	
		Not Applicable		\mathbb{V}						
X Enable tax automation. Ta	xx code:	Accessible to all offices.								
Shipping and Fulfillment		Accessible to selected offices only.								
Enable outgoing shipments in Orders. Drop ship by default.		Oversight Notifications								
Special order by default.		Send notice when an order or PO is opened.								
	nbly job.	Send notice if sold w	ith margin less than:	0)					
X Do not create a sub-asser										
X Do not create a sub-asser										
	list for expense envelopes.									

4. Click Save.

When sub-assembly jobs are disabled, costs are still applied to the related order job, which inherits the sub-assembly job's bill of materials.

Standard Jobs

A <u>standard job (https://aace6.knowledgeowl.com/help/overview-of-jobs#StandardJobs)</u> is always created manually — At the detail view of an order record, click Management > Fulfillment, then click the Jobs section's Add (...) icon.

Standard jobs do *not* have budgets or BOMs. They are considered a 'bucket' for tracking cost entries without having it affect the actual, ongoing job. Only inventoried items can be added to the Cost Entry section; all other types of LICs are tracked in other modules.

Adding Tasks to a Job

You can manually add tasks to jobs. For Standard jobs, this is the only way to add tasks. For other types of jobs, you can add additional tasks as needed. You can manually add tasks either as individual tasks or as sets from a task group.

Note: Tasks can only be created for open jobs. To open a job, navigate to the order record's Jobs section (Management > Fulfillment). Click the job's line-level Actions (🛪) icon, then click Open Job.

Adding a Single Task

- 1. From the Order record detail view, click **Management** tab > **Production** tab.
- 2. In the **Jobs** section, click the Go-To icon for the desired job.
- 3. From the Job record detail view, navigate to the **Tasks** section. Click the **Add** () icon in the Tasks section, and click **Tasks**.

Task: 6	60037	1	Video Pi	roductio	n					PENDING
Production	on Task							Notices	<mark>0 т</mark>	Fasks 🗹 Emails 🎽 Docs
Task Info		1 Relat	ted Record >	Job Info				Customer		
Task Type	Task Priority	Assigned To		Job >	Job Title		Job Priority	Customer >		Contact >
	Normal	Mara Harvey	Q,	60069.1	Video Produ	ction	Normal	Americon Construction	on Inc	Richard C Cucci
Date Start	Time Start	Date End	Time End	Date Start	Time Start	Date End	Time End	Phone	Email	
11/14/22	11:29 AM	11/15/22 🗆	11:29 AM	11/07/22	1:00 PM	12/09/22	1:00 PM	(212) 274-0199		
			r _N					Code	Bud	fgeted To-Date > Remain
			κ.					Code	Bud	
			К.					Code Task Budget (Hrs)	Bud	
			κ.						Remain	Apply Notes
			к.					Task Budget (Hrs)	Remain	
			к.					Task Budget (Hrs)	Remain	Apply Notes

- 4. Fill out the new task with the relevant information (e.g. Task Type, Code, Task Description, etc).
- 5. Click Save.

Adding a Task Group

- 1. From the Order record detail view, navigate to the **Management** tab > **Production** tab.
- 2. In the **Jobs** section, click the Go-To icon for the desired job.
- 3. From the Job record detail view, navigate to the **Tasks** section. Click the **Add** () icon in the Tasks section, and click **Tasks**.

Task Group Type	Name	Abbr	Days	Hours	Total Labor Budget	Status	٩
Task Groups				Selected Tas	k Groups		
🛨 Туре	Name	Abbr		Name			
Sales	Award	GSP	^				^
Item Assembly	Beginner's Paint Set Assembly	BPS-A					
Item Fabrication	Custom Cabinet Fabrication and Paint	CUSTCabFP					
Item Fabrication	Custom Vanity with Sink	VANSink					
Item Assembly	Electronic Whiteboard Refurbishment Process	WBRFB					
Installation Project	Installation - Solar Electric Panels	Install-SPs					
Item Assembly	PP Set 150 Assembly	PP Set 150-A					
Item Assembly	Printer Pack Assembly	PPASMB					
Professional Services	Production LICs	PRD					
Item Assembly	Tablet Bundle Assembly	TBASMB					
Item Assembly	Textbook Bundle Assembly	TB-ASM					
Item Assembly	Whiteboard Assembly Process	WBASMB					
Displaying 12 of 12 found			~				v

4. At the Task Group Selector you can click the task group you want, use the Quick Search bar to find your desired task group, or <u>create a new task group</u>

(https://aace6.knowledgeowl.com/help/creating-task-groups).

5. Click Save.

Changing Task Sequence

You can change the sequence that tasks are listed on the order. The sequence of tasks is found on the job record detail view:

Production Job	4.1 HP Pri	nter Pack	Special			_	OPEN
Job Info				Production	Notices 😣	Tasks 🗹 Emails	🞽 Docs 🤅
Job Priority Sta	art Date Start T	ime End Date	End Time	Code >	Budgeted	i To-Date >	Remain
	/02/23 1:00 #	M 01/16/23	5:00 PM	HP-PPS HP Printer Pack Special			3
Order Info	Order Title		Order Priority	Job Costs	Budgeter	i To-Date >	Remain
60044	Queens County School District		Normal	> BOM-ZT-W White Zip Ties	45		0 ^
Start Date	Start Time End Date		End Time	> HP-200-T HP 200 Series Toner Cartri			45
01/02/23	1:00 PM 01/16/23		5:00 PM	> HP-250 HP 250 Printer	0	30	
Assigned By >	Customer (Bill To) >	Customer (Bill To) > Contact >		> HP-290 HP 290 Printer	15	0	15
Amelia Hill	Queens County Olivia Jackson			> L-ASMBLY Assembly		i 0	6
Job Description	Related Jobs (2)			Tasks			Job Cost Entry
The assembly proces	ss for our printer pack sp	ecials.	/	Task Title	Dept	Assigned	Status 🛪
			(1 > Gather Components	🖈 AI-FFMT	Evan Phillips	· * ()
				2 > Assemble Printer Bundle	AI-FFMT	Ned Walker	۴ 🔴
				3 > Inspection	🖈 AI-QA	Allen Wright	● ₹
				Preferences			
				 Completing or voiding a task will mark the next Auto-close job when all tasks are complete or Apply remaining production quantity when job 	void.		

To change this sequence, hover your mouse pointer over the current sequence number, click and hold the mouse button, then drag the task higher or lower.

Additional Job Preferences

To streamline workflows, your system administrator can mark additional preferences for managing production jobs and tasks. Navigate from Main Menu > System Admin > Preferences > Fulfillment:

- Manage job tasks sequentially Tasks for a production or sub-assembly job will be completed in their listed order. When the first task is marked complete, then second will open as "incomplete".
- Auto-open production jobs When orders that include production jobs move to Open status, aACE will automatically open the production jobs and populate the needed tasks.
- Auto-close jobs when all tasks are complete When all tasks have been marked complete, aACE sets the job to Closed status.
- Auto-close jobs when they are fully costed When all jobs costs have been applied, aACE sets the job to Closed status.
- Auto-apply production cost on close If a job is closed before all production costs are applied, aACE will automatically apply the remaining production cost.

• Mark as incomplete on start date — When a task's start date arrives, aACE will automatically set it to Incomplete status. The task status can be manually changed as needed.