Overview of Tasks

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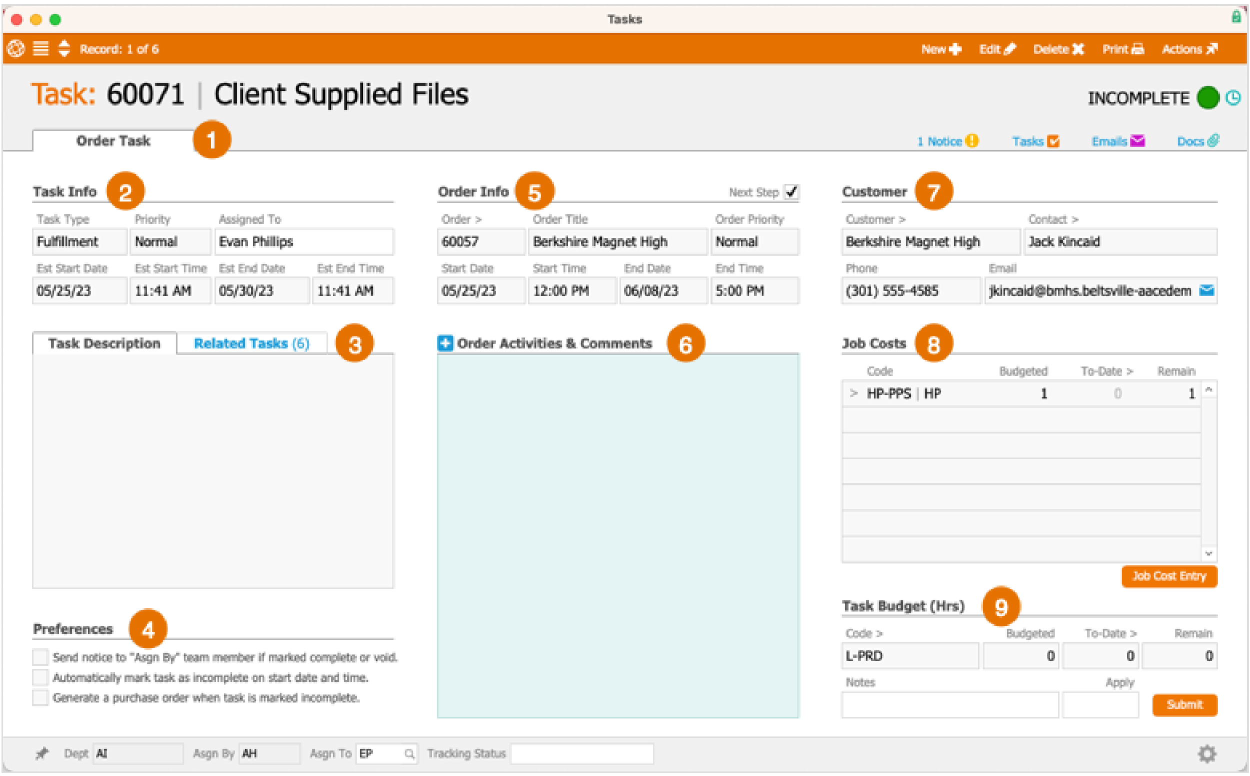
This guide introduces tasks in aACE. It is intended for general users.

Tasks help you organize assembly for items your customers have ordered. Tasks are parts of jobs or leads.

aACE divides tasks into four types — order, production, sales, and standard. They each have slightly different screen layouts, which are explained below.

Order Tasks

Read more about Order tasks (https://aace6.knowledgeowl.com/help/understanding-types-of-tasks#OrderTasks).



1. Task Record Type

Each task detail view will display what kind of task the record is. The task can be an order, production, sales, or standard task.

2. Task Info

Task Info holds general information about the task, its start dates, and its end dates. To edit start and end dates, click Edit > Calendar icon ( ). Select a date from the calendar.

3. Task Description and Related Task

Any details that guide work on the task can be recorded in the Task Description text field. Clicking Edit > Expand icon ( ) will expand the Text Description text field to show more notes.

If the task record has any related tasks, they will appear in the Related Tasks tab for easy access.

4. Preferences

Tasks in aACE can be configured depending on a business's unique needs. A few of these task preferences (https://aace6.knowledgeowl.com/help/understanding-task-preferences) are found on a task's detail view. These specific settings control what happens when the current task moves to a different status.

5. Order Info

Order Info displays general information about the parent order.

6. Order Activities & Comments

You can record additional activities and notes (https://aace6.knowledgeowl.com/help/adding-and-using-notes) regarding an order's process by entering either an activity or comment. These activities and comments are seen on any of the order's related tasks.

Note: These timestamped entries are typically entered during the process of completing the task (e.g. updates, notes about delays, etc). Click the Add icon ( ) to create a new activity or comment.

7. Customer

Important information about the customer from the parent order can be viewed on a task's detail view. You can click the Email icon ( ) to open a new email draft in your default email application. The "To" line will be auto-populated with the customer's specified email address.

8. Job Costs

Line item codes for costs or materials related to the task will appear in the Job Costs section.

You can also see how many of each cost or material is budgeted, left to complete, and completed.

9. Task Budget (Hrs)

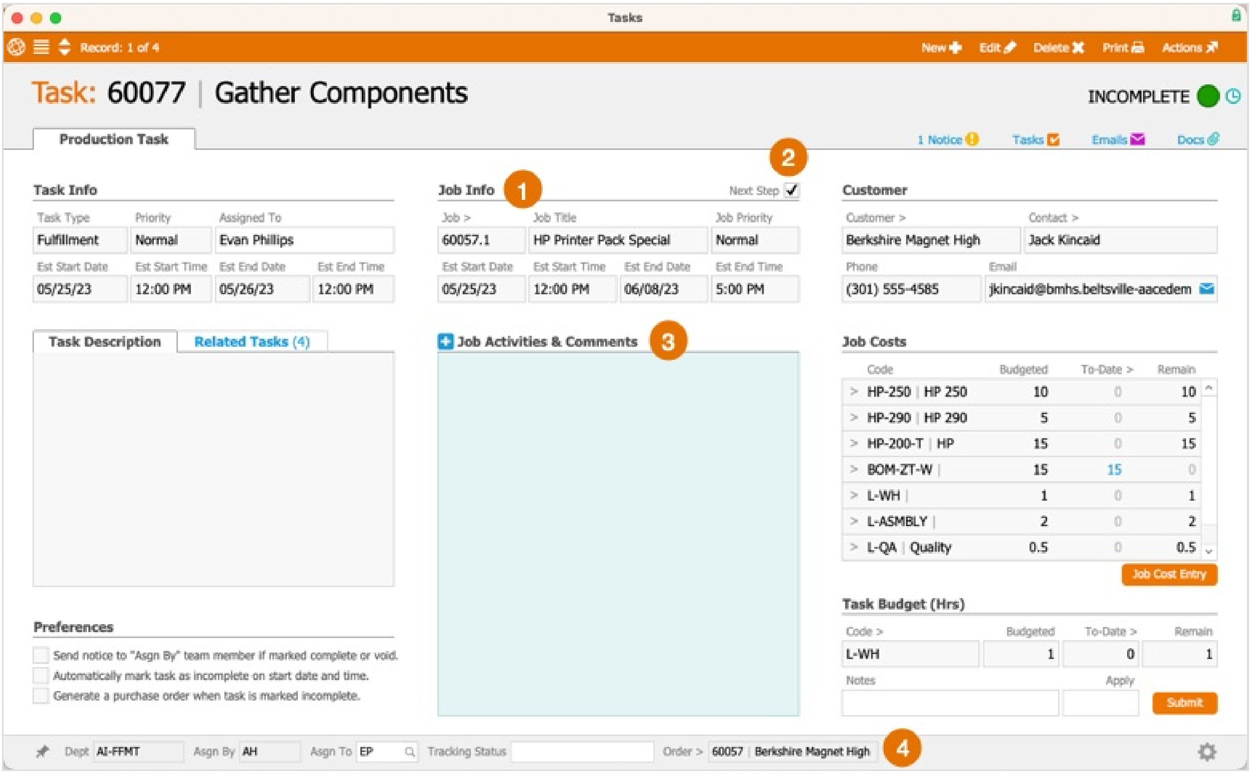
Based on the specified start and end times, aACE will calculate the estimated time to complete the current task. This section also shows how many hours are left to complete. Team members can submit time by typing an amount into the Apply field, then clicking Submit.

Time for the task can also be recorded by clicking the Time Clock icon ( ) to start your time clock. When the clock is running, the icon will display teal ( ). Clicking the icon again will stop your time clock.

Additional Task Overviews

The following additional summaries explain more about Production, Sales, and Standard task layouts. These overviews focus on distinctive features. They do not repeat the common features addressed above.

Production Tasks



1. Job Info

Production tasks are tied to jobs. You can view general information about the parent job for a task in the Job Info section.

2. Next Step

The Next Step flag can be marked to specify which task is next within a job. The Next Step task will be bolded and marked as Incomplete on the job's detail view.

3. Job Activities & Comments

Job Activities & Comments tracks any team member comments or activities completed relating to the task's overall job.

Note: Activities and comments made here carry over to related Production tasks.

4. Assigned Job

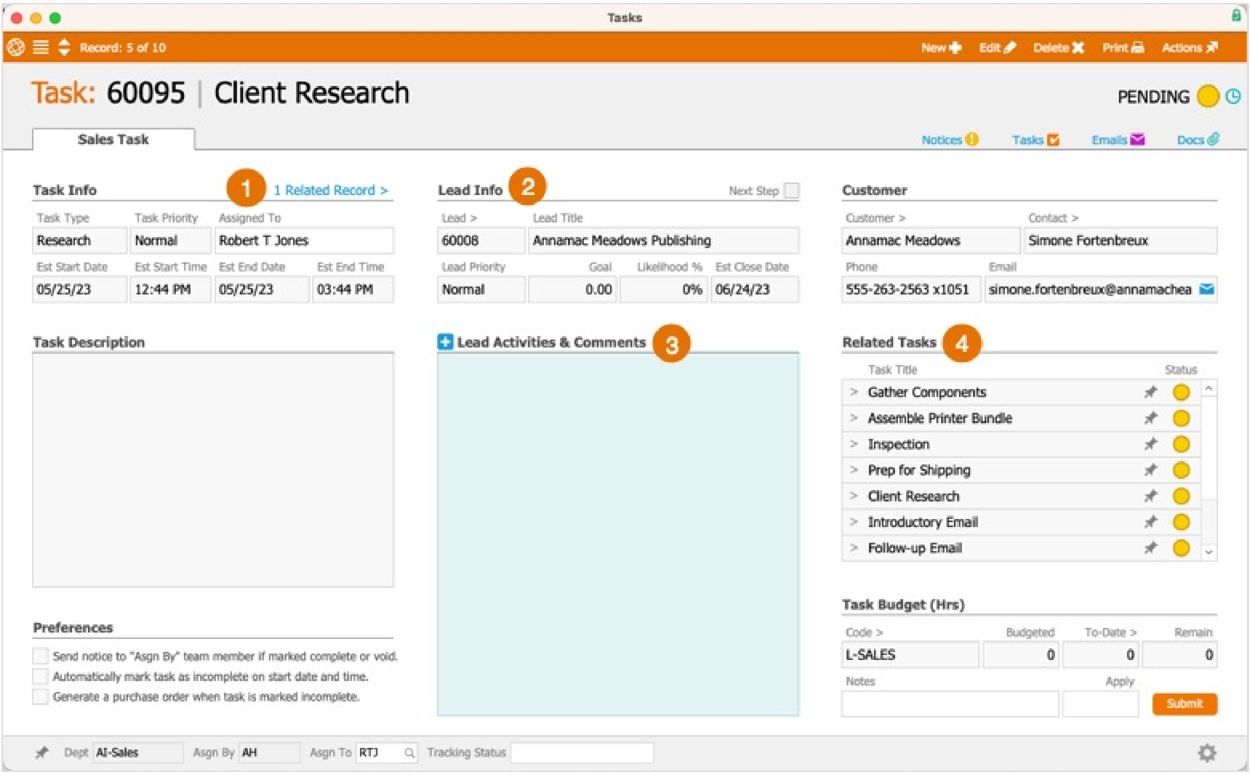
To view the production task's parent order, click the Go-To icon (>).

Read more about [Production tasks](https://aace6.knowledgeowl.com/help/understanding-types-of-tasks#ProductionTasks) (https://aace6.knowledgeowl.com/help/understanding-types-of-tasks#ProductionTasks).

Note: The following summaries about Sales and Standard tasks will focus on distinctive features. They will not repeat the shared features already addressed.

Sales Tasks

Sales tasks have a similar layout to Production tasks. Read more about Sales tasks (https://aace6.knowledgeowl.com/help/understanding-types-of-tasks#SalesTasks).



1. Related Records

To navigate to the sales task's parent lead or other related records, click the Related Records go-to link.

2. Lead Info

Sales tasks are linked to leads. The Lead Info section records basic information about the sales task's parent lead.

3. Lead Activities & Comments

Lead Activities & Comments tracks any team member comments or activities completed relating to the task's overall lead.

4. Related Tasks

Any other sales tasks attached to the parent lead can be viewed in the Related Tasks section.

Standard Tasks

Please refer to the Order Tasks and Production Tasks section above for details on each of the features of a Standard task record. Read more about Standard tasks (https://aace6.knowledgeowl.com/help/understanding-types-of-tasks#StandardTasks).