Overview of Tasks

Last Modified on 10/23/2023 5:18 pm EDT

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 <u>Order tasks (https://aace6.knowledgeowl.com/help/understanding-types-of-tasks#OrderTasks</u>).

🗏 🌲 Record						Tasks					
-	d: 1 of 6							New 💠	Edit 🖋 🛛 Deleti	e 🗙 🛛 Print 🗟	Actions
Task: 6	50071	Client	Supplied	Files						INCOM	PLETE
Order	Task	1						1 Notice 🤇	Tasks 🗹	Emails 🔛	Docs
Task Info	2			Order Info	5		Next Step 🖌	Customer 7			
Task Type	Priority	Assigned To		Order >	Order Title		Order Priority	Customer >	Contad	t >	
Fulfillment	Normal	Evan Phillips		60057	Berkshire M	agnet High	Normal	Berkshire Magnet Hig	h Jack K	Cincaid	
Est Start Date	Est Start Time	Est End Date	Est End Time	Start Date	Start Time	End Date	End Time	Phone	Email		
05/25/23	11:41 AM	05/30/23	11:41 AM	05/25/23	12:00 PM	06/08/23	5:00 PM	(301) 555-4585	jkincaid@bm	hs.beltsville-a	acedem
								> HP-PPS HP	Budgeted 1	To-Date > 0	Remain 1
										0	1
references	4							> HP-PPS HP	1	0	b Cost Entry Rema
Send notice	to "Asgn By" team		ed complete or void.					> HP-PPS HP	9	0	1 b Cost Entry
Automatical	to "Asgn By" team ly mark task as inc	omplete on start of	date and time.					> HP-PPS HP Task Budget (Hrs) Code >	1 9 Budgeted	0 To-Date >	1 b Cost Entry Rema
Send notice Automatical	to "Asgn By" team	omplete on start of	date and time.					> HP-PPS HP Task Budget (Hrs) Code > L-PRD	1 9 Budgeted	0 Jo To-Date > 0	1 b Cost Entry Rema

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 (Ref.) 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 <u>task preferences</u> (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 <u>activities and notes (https://aace6.knowledgeowl.com/help/adding-and-using-notes)</u> 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 (\leq) 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

Task: 6	0077	Gather	Compon	ents						INCOM	PLETE
Productio	on Task							1 Notice 😣	Tasks 🗹	Emails 🞽	Docs
Task Info				Job Info			2 Next Step ✓	Customer			
Task Type	Priority	Assigned To		lob >	Job Title		Job Priority	Customer >	Contact	>	
Fulfillment	Normal	Evan Phillips		60057.1	HP Printer Pa	ck Special	Normal	Berkshire Magnet High	Jack K	incaid	
Est Start Date	Est Start Time	Est End Date	Est End Time	Est Start Date	Est Start Time	Est End Date	Est End Time	Phone	Email		
05/25/23	12:00 PM	05/26/23	12:00 PM	05/25/23	12:00 PM	06/08/23	5:00 PM	(301) 555-4585	jkincaid@bml	ns.beltsville-a	acedem 🞽
Task Descr	iption R	elated Tasks (4)		Job Activi	ities & Comme	ents 3		Job Costs			
						-		Code	Budgeted	To-Date >	Remain
								> HP-250 HP 250	10	0	10
								> HP-290 HP 290	5	0	5
								> HP-200-T HP	15	0	15
								> BOM-ZT-W	15	15	0
								> L-WH	1	0	1
								> L-ASMBLY	2	0	2
								> L-QA Quality	0.5	0	0.5
										Jo	b Cost Entry
								Task Budget (Hrs)			
Preferences								Code >	Budgeted	To-Date >	Remain
Send notice to	o "Asgn By" team	member if marked	complete or void.					L-WH	1	0	1
	mark task as inc	complete on start da						Notes		Apply	
Automatically		en task is marked in									Submit

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 <u>Production tasks</u> (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).

Task: 6	0095	Client	Research				New 🕈	Edit 🖍 Deleti		DING	
Task Info		1 1 R	elated Record >	Lead Info	2	Next Step	Customer				
Task Type	Task Priority	Assigned To		Lead >	Lead Title		Customer >	Contad	>		
Research	Normal	Robert T Jone	es	60008	Annamac Meadow	Publishing	Annamac Meadows		e Fortenbreux		
Est Start Date	Est Start Time	Est End Date	Est End Time	Lead Priority	Goal L	kelihood % Est Close Date	Phone	Email			
05/25/23	12:44 PM	05/25/23	03:44 PM	Normal	0.00	0% 06/24/23	555-263-2563 x105	1 simone.forte	nbreux@annar	nachea	a
							 > Inspection > Prep for Shippin > Client Research > Introductory En 		נ נ נ נ	•	
							> Follow-up Email		7	* 0	
							Task Budget (Hrs)			
Preferences							Code >	Budgeted	To-Date >	Re	mai
			ed complete or void.				L-SALES	0	0		
	mark task as inco	omplete on start of	date and time.				Notes		Apply		
Automatically	urchase order whe										

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 <u>Standard tasks</u>

🖹 🌲 Record: 1 of 1								New 🖶 🛛 E	idit 🌮 🛛 Dele	te 🗶 🔹 Print 🗟	Actions
Task: 60083		Title								PEN	
Standard Task								Notices 🔒	Tasks 🗹	Emails 🚩	Docs
Task Info					Customer						
Task Type	Priority		Assigned To		Customer >			Contact >			
	Normal		Mara Harvey	Q							
Est Start Date Est	Start Time	Est End Date	Est End 1	Time	Direct Phone	Office Phone	Ext	Mobile Phone	e Email		
05/25/23		05/26/23									
ask Description					C Activities 8	& Comments					
ask Description					C Activities 8	& Comments					
					Task Budget						
Treferences						(Hrs)	Budgeted		Apply Notes		
Preferences	incomplete on start	date and time.			Task Budget ((Hrs)	Budgeted 0	Remain 0	Apply Notes		
	incomplete on start	date and time.			Task Budget ((Hrs)			Apply Notes		Submit

(https://aace6.knowledgeowl.com/help/understanding-types-of-tasks#StandardTasks).