

# Understanding Task Assignment Logic

Last Modified on 10/23/2023 5:20 pm EDT

This guide explains how task assignments function. It is intended for general users.

You can link [tasks](https://aace6.knowledgeowl.com/help/overview-of-tasks) to [jobs](https://aace6.knowledgeowl.com/help/overview-of-jobs) and leads, or group them together to [create a task group](https://aace6.knowledgeowl.com/help/creating-task-groups). A task assignment dedicates a team member to complete a task associated with a job. These assignments can be reviewed in multiple places:

- [Sales tasks](https://aace6.knowledgeowl.com/help/overview-of-tasks#SalesTasks) — Navigate from Main Menu > CRM & Sales > Leads > desired lead's detail view > Lead Details tab > Tasks tab.
- [Order tasks](https://aace6.knowledgeowl.com/help/overview-of-tasks#OrderTasks) or [standard tasks](https://aace6.knowledgeowl.com/help/overview-of-tasks#StandardTasks) — Navigate from Main Menu > Order Management > Orders > desired order's detail view > Management tab > Production tab.
- [Production tasks](https://aace6.knowledgeowl.com/help/overview-of-tasks#ProductionTasks) — Navigate from Main Menu > Order Management > Orders > desired order's detail view > Management tab > Production tab > desired production job > Tasks section.  
Note: Production jobs are identified with an affix at the end of their job record ID (e.g. JOB10000.1).

## Task Assignment Logic

For task assignments, aACE assumes that a specific individual will be responsible for completing or coordinating each task. It initially suggests the team member most likely to be responsible for each task. If the assignment needs to be transferred to someone else, you can click into the assignment field and select from the drop-down list of teams members with the relevant privileges.

### Individual Tasks

Individual task assignments can be found at the task's detail view, under the Task Info section and in the footer:

**Task: 60040 | Gather Components** INCOMPLETE

Production Task | 1 Notice | Tasks | Emails | Docs

**Task Info**

Task Type	Task Priority	Assigned To
Fulfillment	Normal	Evan Phillips
Start Date	Start Time	End Date
01/02/23	01:00 PM	01/03/23
		End Time
		01:00 PM

**Job Info**

Job >	Job Title	Job Priority
60044.1	HP Printer Pack Special	Normal
Start Date	Start Time	End Date
01/02/23	1:00 PM	01/16/23
		End Time
		5:00 PM

**Customer**

Customer >	Contact >
Queens County School	Olivia Jackson
Phone	Email
(212) 555-0874 x504	olivia.jackson@queensco.k12.ny.u

**Job Costs**

Code	Budgeted	To-Date >	Remain
> HP-250   HP 250	30	0	30
> HP-290   HP 290	15	0	15
> HP-200-T   HP	45	0	45
> BOM-ZT-W	45	45	0
> L-WH	3	0	3
> L-ASMBLY	6	0	6
> L-QA   Quality	1.5	0	1.5

**Task Budget (Hrs)**

Code >	Budgeted	To-Date >	Remain
L-WH   Warehouse	9	0	9

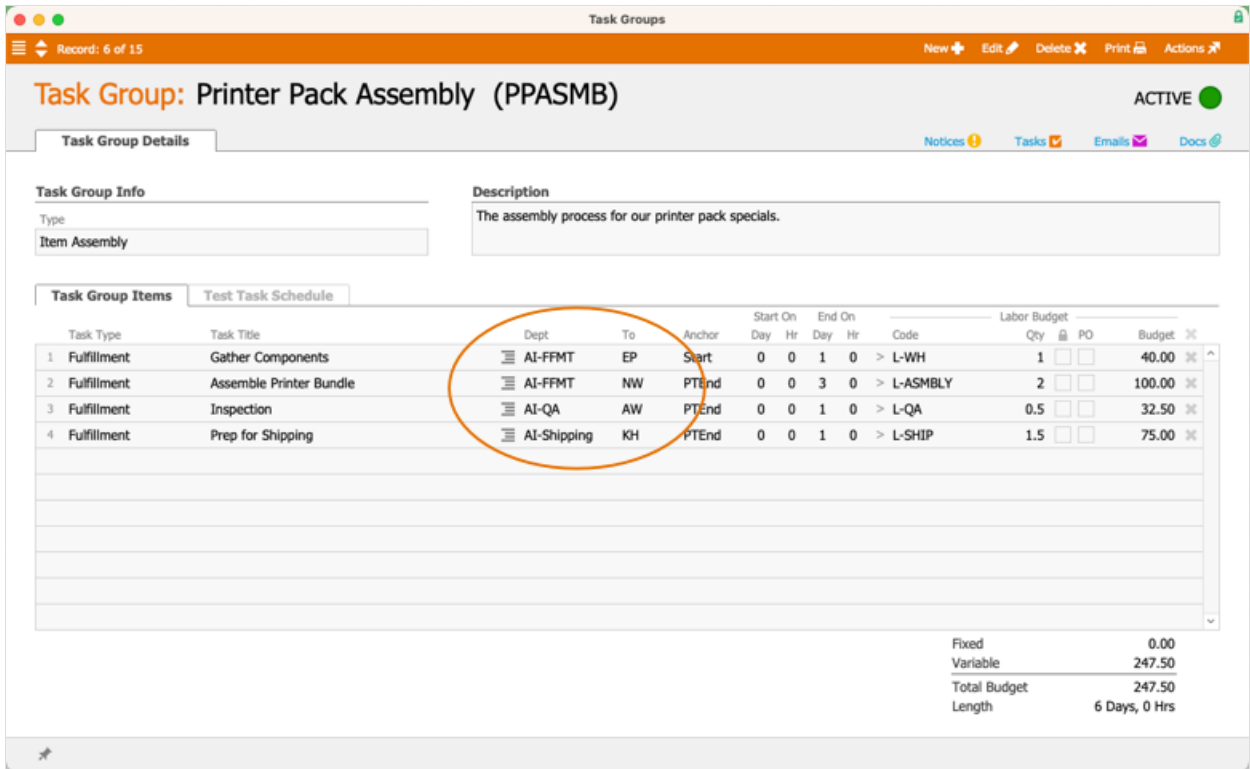
Notes: [ ] Apply [ ] Submit

Dept: AI-FMT | Asgn By: AH | Asgn To: EP | Tracking Status: [ ] | Job: 60044.1 | HP Printer Pack

Any individual task assignment can be changed as needed.

## Task Groups

Individual task assignments within a task group can be managed from the Task Groups module (Main Menu > Order Setup > Task Groups > desired task group's detail view):



You can assign various team members to the tasks in a single task group. For example, the screenshot above shows Task 1 assigned to EP and Task 2 assigned to NW.

aACE provides default task assignments. For example, when the system auto-generates a task for an order or lead, it assigns a team member. Users with the needed privileges can change these default assignments.

The logic for default task assignments is as follows:

Department specified?	Team Member specified?	Task assignment defaults to...
N	N	The team member noted in the "Assigned To" field at the bottom of the parent job.
Y	N	That department's traffic manager. You can update the traffic manager at Main Menu > Internal > Offices > Departments tab.
N	Y	That team member. aACE will also automatically enter that team member's department for the task.

Y	Y	That team member. aACE will leave the manually specified department, even if that team member is not related that department.
---	---	---

---