

Understanding Order, Production, Standard, and Sales Tasks

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This guide explains different types of tasks. It is intended for advanced users.

Tasks in aACE are records used to organize steps for the fulfillment of an order or a lead. You can create and configure various kinds of tasks to best support your organization's workflows. You can also [configure various preferences](https://aace6.knowledgeowl.com/help/understanding-task-preferences) to control how tasks are handled in your system.

For additional details on specific task features, please review the guide [Overview of Tasks](https://aace6.knowledgeowl.com/help/overview-of-tasks).

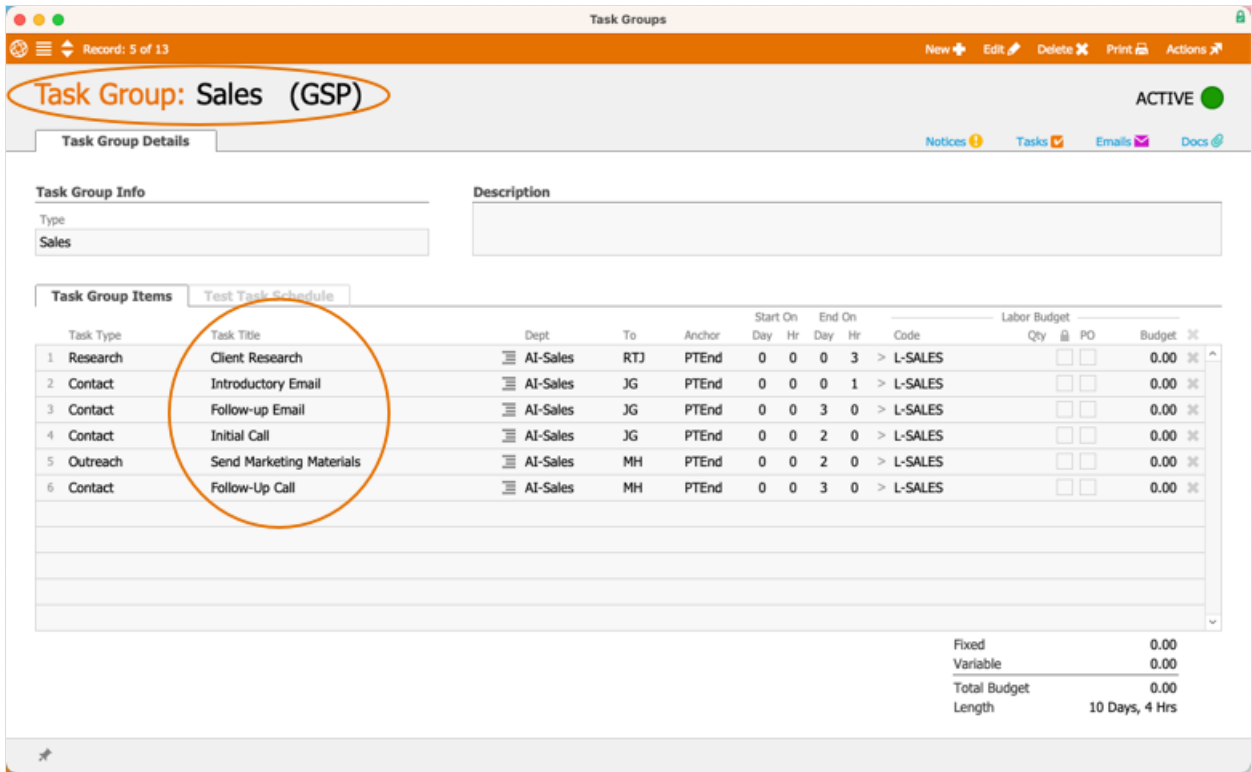
Types of Tasks

aACE includes four kinds of tasks — order, production, sales, and standard — which are detailed below.

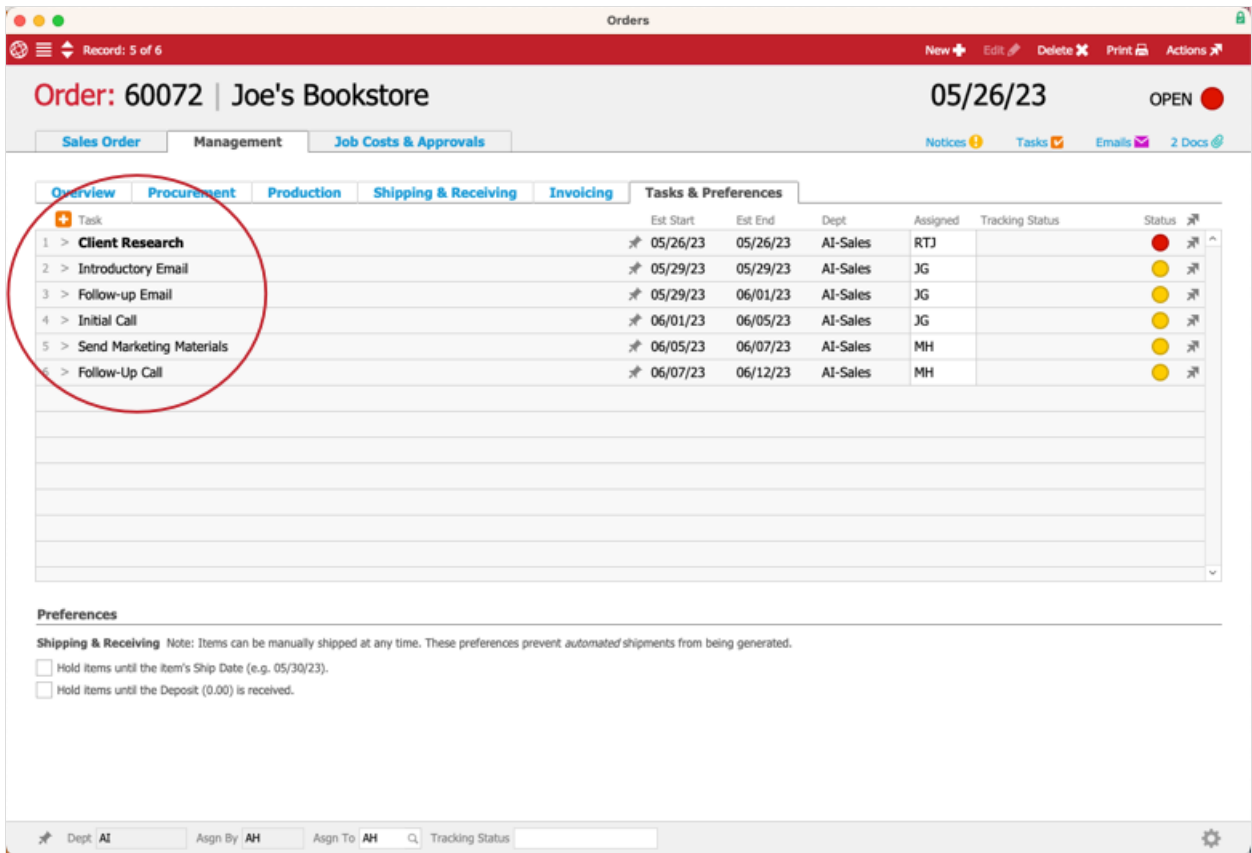
Order Tasks

aACE generates order tasks from task groups associated with orders. To create this association, the task group name *must* match the Order Type. When you open a new order with that Order Type, aACE auto-generates the tasks from a task group.

For example, a task group named "Sales" would generate the specified order tasks on *every* sales order.

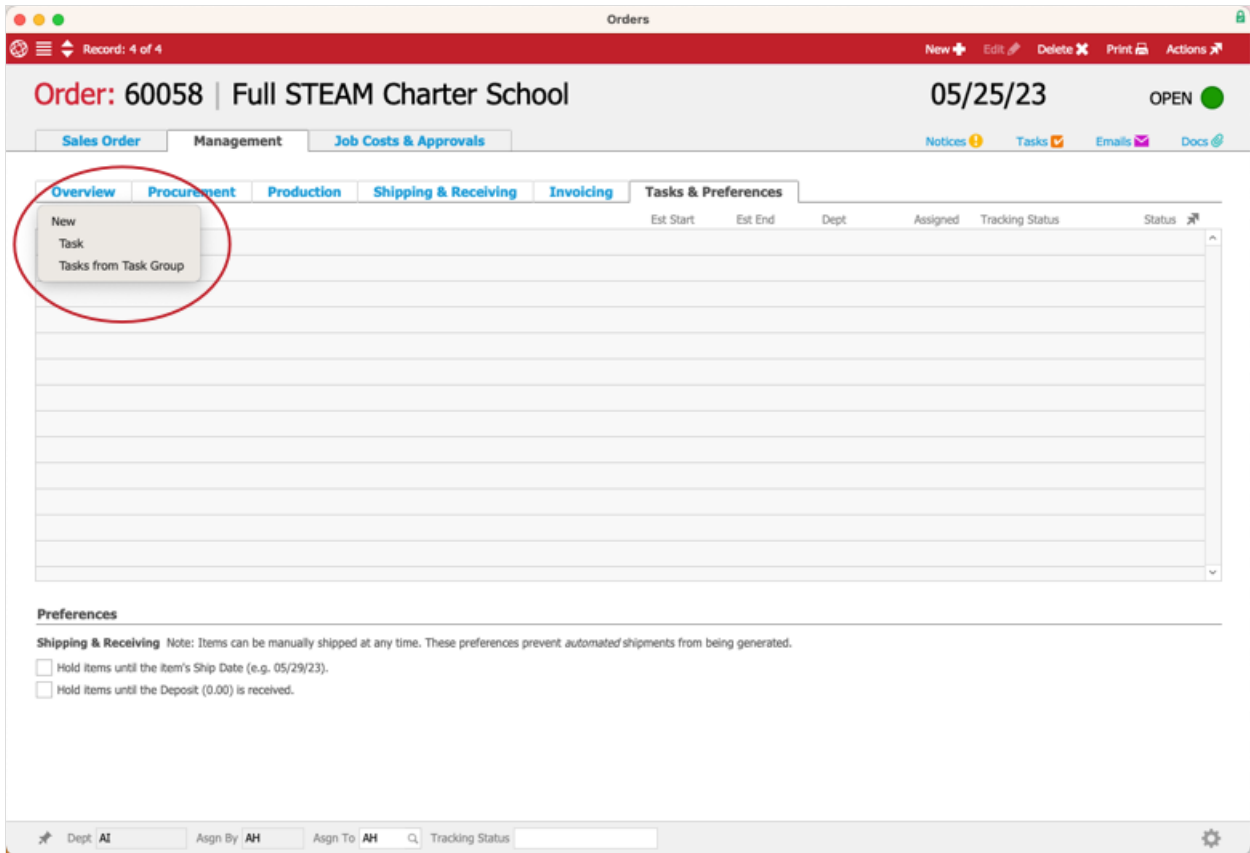


Tasks from an order's task group are displayed on the Tasks & Preferences tab:



You can also manually add order tasks to an order. On the Tasks & Preferences tab, click Add (+):

- To create a single order task, click Task.
- To select a task group and add all the related tasks, click Tasks from Task Group.



The layout for production, sales, and standard tasks are all similar to order tasks.

Production Tasks

Tasks attached to a [production job](https://aace6.knowledgeowl.com/help/overview-of-jobs#ProductionJobs) are always production tasks. aACE automatically creates these tasks when a production order generates a production job. They can be created via a task group or you can manually add tasks to the production job.

Sales Tasks

Sales tasks are focused on sales leads. Because they are not for production efforts, they do *not* have a Job Costs section. Instead, there is a section titled Related Tasks with a next-step column for the lead. You can manually add sales tasks to a lead or you can generate them from a task group.

If you create a new lead and set the Lead Type to match the name of an existing task group, aACE will automatically generate tasks based on that task group. For example, if you create a task group called "Trade Show," any lead with the Type field set to "Trade Show" will automatically populate with that series of tasks.

Standard Tasks

Standard tasks are used to add tasks to a job after the order has been opened (i.e. if a new, uncommon step needs to be added to a specific process). Standard tasks are always created manually on the order's [order job](https://aace6.knowledgeowl.com/help/overview-of-jobs#OrderJobs) (<https://aace6.knowledgeowl.com/help/overview-of-jobs#OrderJobs>).
