Understanding Order, Production, Standard, and Sales Tasks

Last Modified on 10/23/2023 5:19 pm EDT

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 <u>configure various preferences</u> (https://aace6.knowledgeowl.com/help/understanding-taskpreferences) to control how tasks are handled in your system.

For additional details on specific task features, please review the guide <u>Overview of Tasks</u> (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.

es Task Group Items Task Tripe Task Title Contact Introductory Email Contact Initial Call Dept AI-Sales JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG PTEnd JG JG JG PTEnd JG JG JG JG JG JG JG JG JG JG	Fask Group Info		Description									
Task Group Items Test Task Schedule Task Type Task Title Dept To Anchor Day Hr Day Hr Code Qty PO Budget Research Client Research Introductory Email Image: Al-Sales RTJ PTEnd 0 0 0 1 > L-SALES 0.00 0.00 Contact Introductory Email Image: Al-Sales JG PTEnd 0 0 0 1 > L-SALES 0.00	Type											
Task Type Task Title Dept To Anchor End On End On Labor Budget Research Client Research Introductory Email Al-Sales RTJ PTEnd 0 0 0 3 > L-SALES 0.00 0 Contact Introductory Email Introductory Email Al-Sales JG PTEnd 0 0 1 > L-SALES 0.00 0 Contact Follow-up Email Initial Call Al-Sales JG PTEnd 0 0 3 0 > L-SALES 0.00 0.00 0	Sales											
Task Type Task Title Dept To Anchor End On End On Labor Budget Research Client Research Introductory Email Al-Sales RTJ PTEnd 0 0 0 3 > L-SALES 0.00 0 Contact Introductory Email Introductory Email Al-Sales JG PTEnd 0 0 1 > L-SALES 0.00 0 Contact Follow-up Email Initial Call Al-Sales JG PTEnd 0 0 3 0 > L-SALES 0.00 0.00 0												
Task TipeTask TitleDeptToAnchorDayHrDayHrCodeQtyPOBudgetResearchClient ResearchII Al-SalesRTJPTEnd0003> L-SALES00.00ContactIntroductory EmailII Al-SalesJGPTEnd0001> L-SALES00.00ContactFollow-up EmailII Al-SalesJGPTEnd0030> L-SALES0.000ContactInitial CallII Al-SalesJGPTEnd0020> L-SALES0.000OutreachSend Marketing MaterialsII Al-SalesMHPTEnd0020> L-SALES0.000	Task Group Items Te	st Task Schedule										
Research Client Research I AI-Sales RTJ PTEnd 0 0 3 > L-SALES 0.00 Contact Introductory Email Image: AI-Sales JG PTEnd 0 0 1 > L-SALES 0.00 0 0 0 1 > L-SALES 0.00 0 0 0 1 > L-SALES 0.00 0	/											
Contact Introductory Email Image: AI-Sales JG PTEnd 0 0 1 > L-SALES 0.00 0										Qty		
Contact Follow-up Email Image: AI-Sales JG PTEnd 0 0 3 0 > L-SALES 0.00 <												
Contact Initial Call Image: AI-Sales JG PTEnd 0 0 2 0 > L-SALES 0.00 0 Outreach Send Marketing Materials Image: AI-Sales MH PTEnd 0 0 2 0 > L-SALES 0.00 <												
Outreach Send Marketing Materials Image: AI-Sales MH PTEnd 0 0 2 0 > L-SALES 0.00 0												
		bliow-Up Call	AI-Sales	MH	PTEnd				> L-SALES			
	- contact	niow-op call	.≡ A1-5dies	MH	Piend	0	υ.	, 0	- L-SALES		0.00	~
Fixed 0.00												
Fixed 0.00 Variable 0.00 Total Budget 0.00										Variable	0.00	

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

-	Orders							
E 🗢 Record: 5 of 6					New 🖶	Edit 🖋 🛛 Delete 🕻	🗙 Print 🖴 🕖	Actions ;
Order: 60072 Joe's Bookstore					05/2	6/23	OP	EN 🧲
Sales Order Management Job Costs & Ap	provals				Notices 🔒	Tasks 💟	Emails 🔛	2 Docs
Overview Procurement Production Shipping	& Receiving Invoicing Tasi	ks & Prefere	nces					
Task			End	Dept	Assigned	Fracking Status	Statu	s x™
1 > Client Research	* 05/		/26/23	AI-Sales	RTJ		•	7
2 > Introductory Email	* 05/	29/23 05	/29/23	AI-Sales	JG		0	R.
3 > Follow-up Email	* 05/	29/23 06	/01/23	AI-Sales	JG		0	۳ĸ
4 > Initial Call	* 06/	01/23 06	/05/23	AI-Sales	JG		0	r,
5 > Send Marketing Materials	* 06/	05/23 06	/07/23	AI-Sales	MH		0	۳
Follow-Up Call	* 06/	07/23 06	/12/23	AI-Sales	MH		0	r,
references								
Preferences Shipping & Receiving Note: Items can be manually shipped at any time. Ti Hold items until the item's Ship Date (e.g. 05/30/23). Hold items until the Deposit (0.00) is received.	hese preferences prevent automated shipment	s from being ge	nerated.					

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.

• •	Orders			
≣ \$ Record: 4 of 4		New 🖶 🛛 E	idit 🤌 🛛 Delete 🕯	🗙 Print 🖶 Actions ;
Order: 60058 Full STEAM Chart	er School	05/2	5/23	OPEN
Sales Order Management Job Costs & Appr	ovals	Notices 🔒	Tasks 🗹	Emails 🔛 🛛 Docs (
Overview Procurement Production Shipping &	Receiving Invoicing Tasks & Preferences			
New Task Tasks from Task Group	Est Start Est End	Dept Assigned Ti	racking Status	Status 🔊
Preferences				
Shipping & Receiving Note: Items can be manually shipped at any time. Thes Hold items until the item's Ship Date (e.g. 05/29/23). Hold items until the Deposit (0.00) is received.	e preferences prevent automated shipments from being generated.			
📌 Dept AI Asgn By AH Asgn To AH Q Tra	cking Status			4

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

Production Tasks

Tasks attached to a <u>production job (https://aace6.knowledgeowl.com/help/overview-of-jobs#ProductionJobs)</u> 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 <u>order job (https://aace6.knowledgeowl.com/help/overview-of-jobs#OrderJobs</u>).