Understanding Task Preferences

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This guide explains preferences you can use to configure how aACE handles various task records. It is intended for advanced users.

Preferences for tasks can effect an individual task, an entire job, or all tasks throughout your aACE system. Some preferences modify task completion workflows, but do not affect <u>specific task scheduling (https://aace6.knowledgeowl.com/help/understanding-task-group-anchoring-and-scheduling)</u>. Task preferences are located on the task details view, the job details view, and in the Management Preferences module.

Task Details View

Preferences located on a task's detail view apply only to that task.

Note: These preferences *cannot* be set at the task group level. They must be set manually for each individual task.

		Gather	r Compor	nents						INCOM	
Productio	on Task							1 Notice 😣	Tasks 🗹	Emails 🞽	Docs
Task Info		Job Info	Job Info Next Step 🗸				Customer				
Fask Type Priority Assigned To		Job >	Job > Job Title		Job Priority	Customer > Contact >					
ulfillment	Normal	Evan Phillips		60057.1	HP Printer Pa	ck Special	Normal	Berkshire Magnet High	Jack K	Gincaid	
st Start Date	Est Start Tim	e Est End Date	Est End Time	Est Start Date	Est Start Time	Est End Date	Est End Time	Phone	Email		
5/25/23	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@bm	hs.beltsville-a	acedem
Task Descr	ription	lelated Tasks ((4)	Job Activi	ities & Comme	ents		Job Costs			
Task Descr	ription	elated Tasks ((4)	🔁 Job Activi	ities & Comme	ents		Job Costs Code	Budgeted	To-Date >	Remain
Task Descr	ription	elated Tasks ((4)	🚹 Job Activi	ities & Comme	ents			Budgeted	To-Date >	
Task Descr	ription	elated Tasks	(4)	🚹 Job Activi	ities & Comme	ents		Code			
Task Descr	ription	telated Tasks ((4)	Job Activi	ities & Comme	ents		Code > HP-250 HP 250	10	0	10
Task Descr	ription	lelated Tasks	(4)	🛃 Job Activi	ities & Comme	ents		Code > HP-250 HP 250 > HP-290 HP 290	10 5	0	10 5
Task Descr	ription	telated Tasks	(4)	🚹 Job Activi	ities & Comme	ents		Code > HP-250 HP 250 > HP-290 HP 290 > HP-200-T HP	10 5 15	0 0 0	10 5 15
Task Descr	ription	elated Tasks	(4)	Job Activi	ities & Comme	ents		Code > HP-250 HP 250 > HP-290 HP 290 > HP-200 HP > BOM-ZT-W	10 5 15 15	0 0 0 15	10 5 15 0
Task Descr	ription	telated Tasks	(4)	Job Activi	ities & Comme	ents		Code > HP-250 HP 250 > HP-290 HP 290 > HP-200-T HP > BOM-ZT-W > L-WH	10 5 15 15 1	0 0 0 15 0	10 5 15 0 1 2
Task Descr	ription	telated Tasks	(4)	Job Activi	ities & Commo	ents		Code > HP-250 HP 250 > HP-290 HP 290 > HP-200-T HP > BOM-ZT-W > L-WH > L-ASMBLY	10 5 15 15 1 2	0 0 15 0 0 0	10 5 15 0 1 2 0.5
	ription	telated Tasks	(4)	C Job Activi	ities & Commo	ents		Code > HP-250 HP 250 > HP-290 HP 290 > HP-200-T HP > BOM-ZT-W > L-WH > L-ASMBLY > L-QA Quality	10 5 15 15 1 2	0 0 15 0 0 0	10 5 15 0 1 2 0.5 6 Cost Entry
references			(4) ed complete or void.	C Job Activi	ities & Comme	ents		Code > HP-250 HP 250 > HP-290 HP 290 > HP-200-T HP > BOM-ZT-W > L-WH > L-ASMBLY > L-QA Quality	10 5 15 1 2 0.5	0 0 15 0 0 0	10 5 15 0 1

• Send notice to "Asgn By" team member if marked complete or void — The team member who creates an order is initially recorded as Assigned By. When a task in an order is completed, the Assigned By team member will get a notice.

• Automatically mark task as incomplete on start date and time — Allows team members to begin work at a specified time without manually updating a task to Incomplete status.

Note: Incomplete status is required for team members to apply time to a task. This preference can be particularly helpful when using the <u>Job Shop App</u>

(https://aace6.knowledgeowl.com/help/using-the-aace-job-shop-app).

 Generate a purchase order when task is marked incomplete — This preference is used when buyout or outsourced items are in the order. When the task is marked incomplete, aACE will generate a PO for the vendor. A team member will review, open, and email the PO.

Job Details View

These preferences are only located on production jobs. Preferences located on a job's detail view applies to *all* tasks listed in its Tasks section. They effect how the flow of tasks or the completion of the job is managed.

Production Job			ack Spe			Notices 😣 Ta	sks 🗹 🛛 Emails		ocs (
lob Info					Production				
Priority	Est Start Date	Est Start Time	Est End Date	Est End Time	Code >	Budgeted	To-Date >	Rem	ain
Normal	05/25/23	12:00 PM	06/08/23	5:00 PM	HP-PPS HP Printer Pack Special	1	0		1
Order Info	Title			Order Priority	Job Costs	Budgeted	To-Date >	Rema	ain
60057	Title Berkshire Magnet High School			Normal	> BOM-ZT-W White Zip Ties	15	15		0
Start Date	Start Time	End Date		End Time	> HP-200-T HP 200 Series Toner Cartri	idge 15	0		15
05/25/23	12:00 PM	06/08/23		5:00 PM	> HP-250 HP 250 Printer	10	0		10
Assigned By >	Customer (Bill To) >	Contact >			> HP-290 HP 290 Printer	5	0		5
Jamie Gianelli	Berkshire Magnet	Jack Kinca	aid		> L-ASMBLY Assembly	2	0		2 .
Job Description	Related Jobs (2))			Tasks			Job Cost 8	Entry
The assembly proces	s for our printer pack	specials.			Task	Dept	Assigned	Status	ħ
					1 > Gather Components	AI-FF	MT EP	•	7
					2 > Assemble Printer Bundle	AI-FF	MT NW	•	Fr.
					3 > Inspection	AI-Q	A AW	•	Я.
					Preferences				

- Completing or voiding a task will mark the next task incomplete Streamlines a process by automatically starting the next task
- Auto-close job when all tasks are complete or void Streamlines processes for companies who want inventory back-flush or additional automation.
- Apply remaining production quantity when job is closed Streamlines processes so

team members do not have to manually enter details when a job is finished.

Management Preferences Module

System administrators can set preferences that will effect *all* tasks throughout your system. Navigate from Main Menu > Internal > Management Preferences > Production:

🗧 😑 Manager	ent Preferences
3	New 🖶 Edit 🌶 Delete 💥 Print 📾 Actions 🛪
aACE Management Preferences	
Branding Order Entry Billing Procurement Production	n Shipping
Jobs	Job Automation
Schedule sub-jobs before the parent job.	Auto-open production jobs.
Manage job tasks sequentially.	Auto-close jobs when all tasks are complete.
Send assignment notice on Cleation.	Auto-close jobs when they are fully costed.
Send assignment notice on open.	Auto-apply inventory costs on receipt (incoming shipments or purchases, depending on the transaction).
	 Auto-apply production cost on close.
	Auto-close order job.
Tasks	Task Automation
Notify assigner when task is completed.	Mark as incomplete on start date. Select this to have new tasks default to this behavior. This behavior can be changed on a task-by-task basis.
Inventory	Time
Backflush inventory entry.	Generate time entries from call dialog.
Require bin selection in Shipping Log and Jobs.	Allow time to be posted to closed jobs from Timesheets.
Validate available inventory balance.	The maximum hours for a timesheet is:
Validate bin inventory balance.	
Default Replenishment Target	
0	
Default Replenishment Threshold	
0	

- Manage job tasks sequentially Requires tasks to be started and completed in the order.
- Notify assigner when task is completed When a task in an order is completed, the Assigned By team member will get a notice..
- Mark as incomplete on start date As with task-specific preferences above, allows team members to begin work at a specified time without manually updating a task to Incomplete status.