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 specific task scheduling (https://aace6.knowledgeowl.com/help/understanding-task-group-anchoring-and-scheduling). 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.
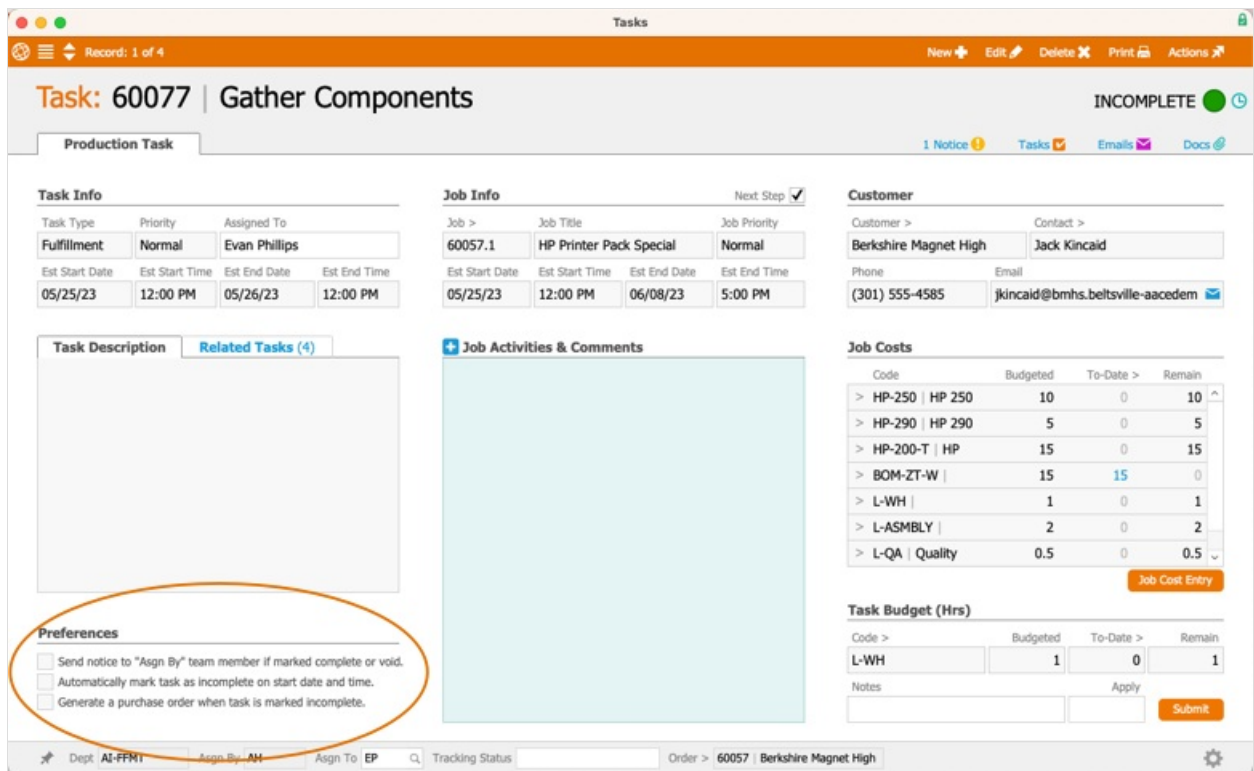
- **Send notice to "Asgn By" team member if marked complete or void** — The team member who creates an order is initially recorded as Assigned By. When a task in an order is completed, the Assigned By team member will get a notice.

- **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 Job Shop App
  (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.

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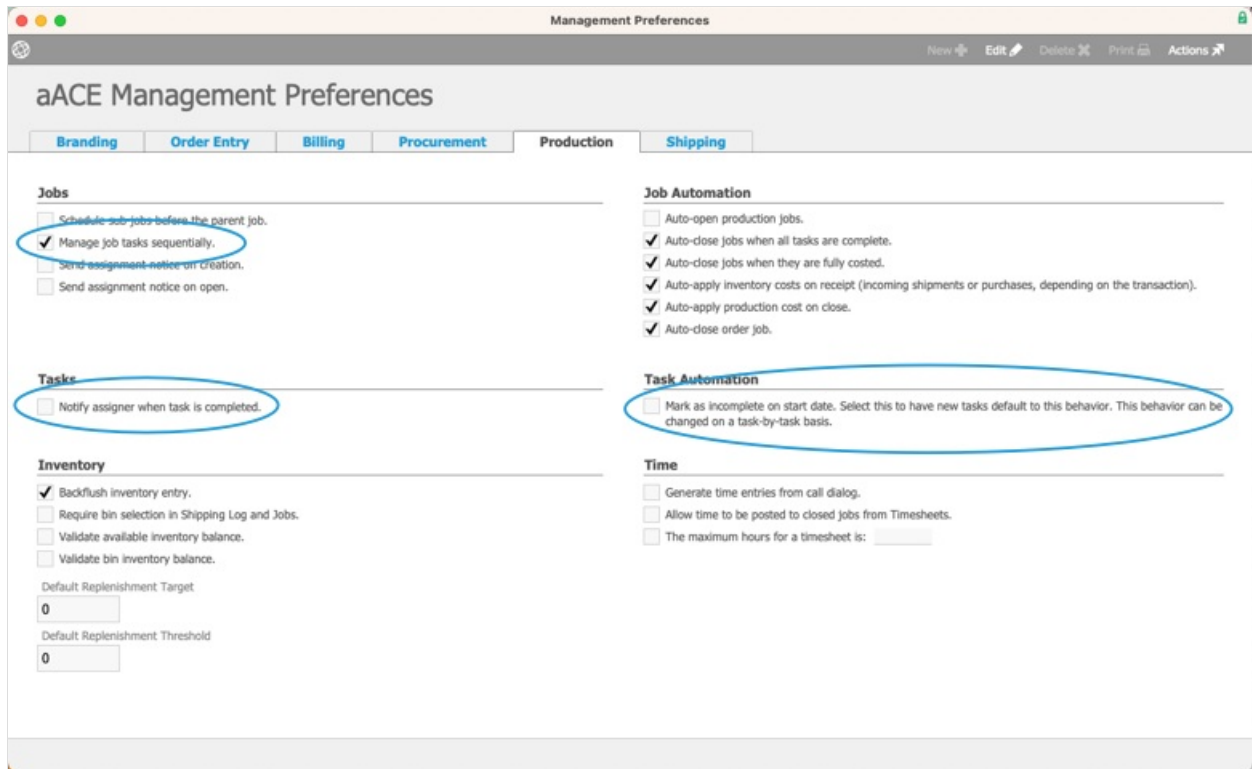
- **Manage job tasks sequentially** — Requires tasks to be started and completed in the order.
- **Notify assigner when task is completed** — When a task in an order is completed, the Assigned By team member will get a notice..
- **Mark as incomplete on start date** — As with task-specific preferences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