

Template Task Setup

Training Video 2020 - [Click Here](#)

Job Costing > Configuration > Template Task

Template Tasks are only available in the Job Costing Module. They allow the user to define a sort of Bill of Materials with an exception. This task which is created allows one to insert many stock items, service and custom type items into a Task. The task only takes the quantity of the items when setting up, but once inserted into a quote it will pull all cost and selling prices at that time.

The task that is created consists of many items, these items are broken up into individual lines within the job management. The customer only sees the name of the task but none of the line items.

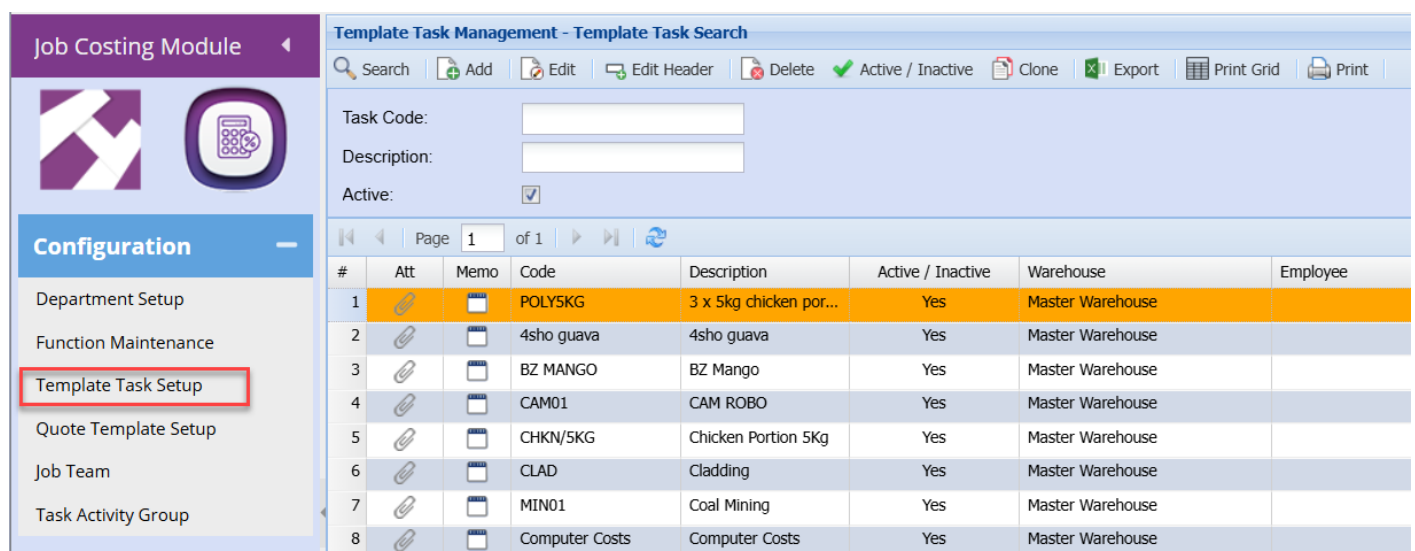
The line items of the task has costs and selling prices which then make up the overall

cost and selling of the task.

One can have tasks under tasks, it does not matter as the system will always take the lowest lever of items into the managing of the job.

The example we will use to show you how a task is setup will be the making of a motor car.

Template tasks makes it easy for the users not to understand what the components are made of. It gives the user the detail list of all the items by just selecting the main task.

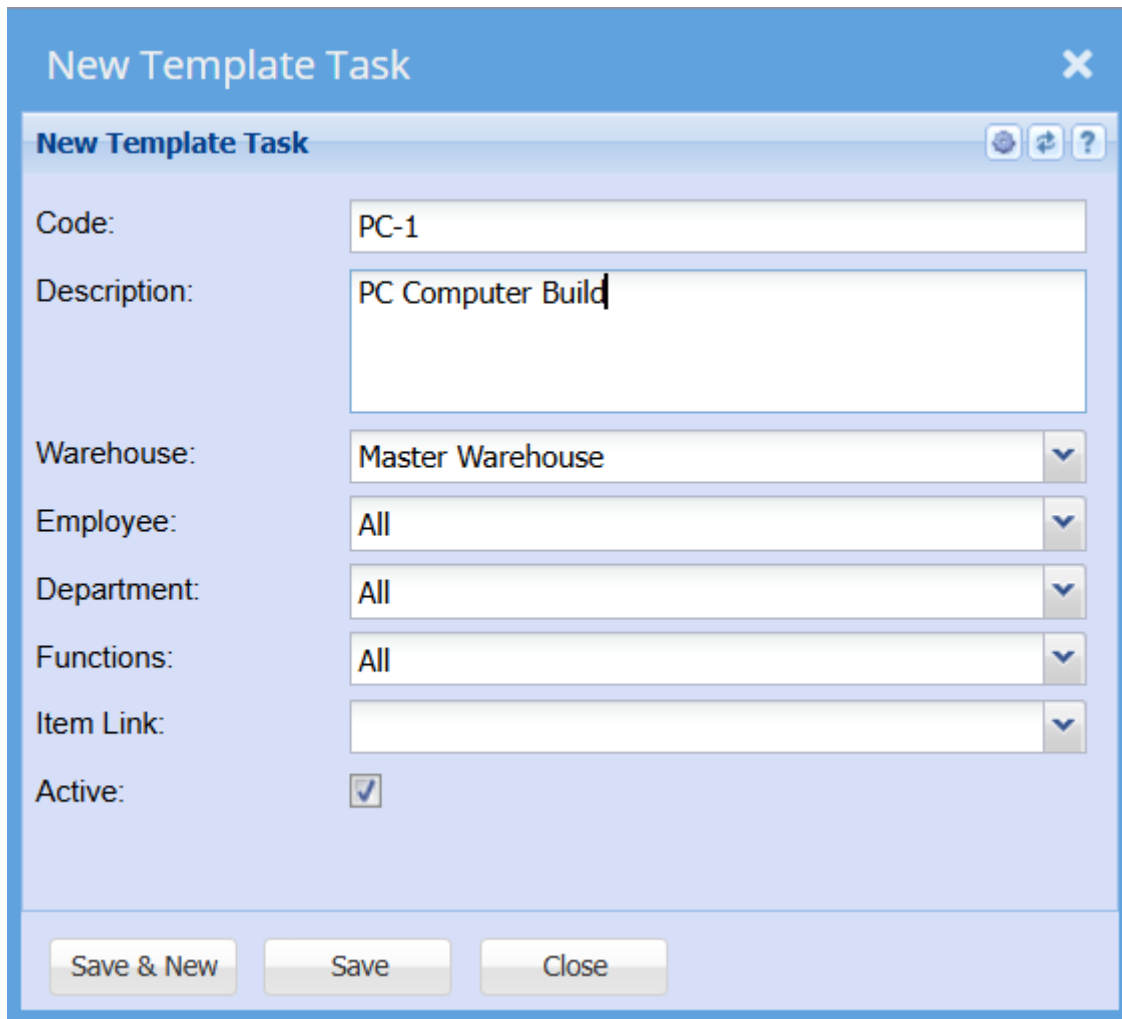


#	Att	Memo	Code	Description	Active / Inactive	Warehouse	Employee
1			POLY5KG	3 x 5kg chicken por...	Yes	Master Warehouse	
2			4sho guava	4sho guava	Yes	Master Warehouse	
3			BZ MANGO	BZ Mango	Yes	Master Warehouse	
4			CAM01	CAM ROBO	Yes	Master Warehouse	
5			CHKN/5KG	Chicken Portion 5Kg	Yes	Master Warehouse	
6			CLAD	Cladding	Yes	Master Warehouse	
7			MIN01	Coal Mining	Yes	Master Warehouse	
8			Computer Costs	Computer Costs	Yes	Master Warehouse	

To create a template task go to the Job Costing □ Configuration □ Template Task.

Click on the add button to create a new task.

Give a code and Description of the task



New Template Task

Code: PC-1

Description: PC Computer Build

Warehouse: Master Warehouse

Employee: All

Department: All

Functions: All

Item Link:

Active: ☒

Save & New Save Close

In the figure below you will notice there a small window that opens up to give you some functions to add parent tasks.

The menu is divided up into Parent and items tasks. Parent tasks are names of the group of items below it.

Menu explained

Add Parent Task - Create another header for items below the main header

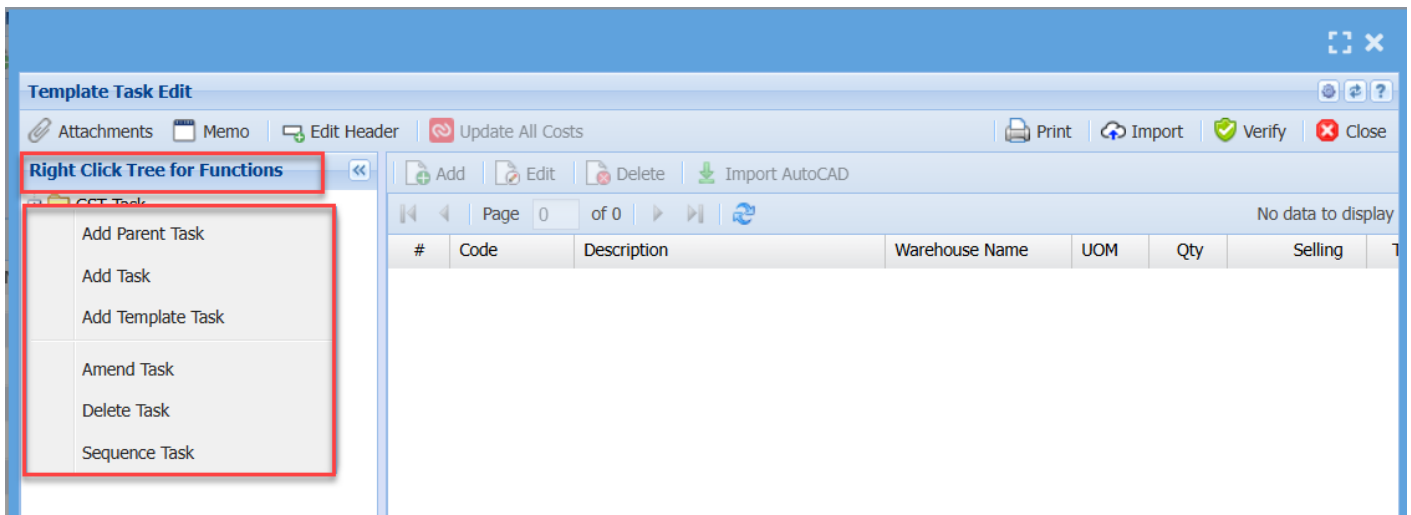
Add Task - Creates a name of a header for task, this task allows the user to add stock, custom and service items below this header.

Add Template Task - This allows one to add another Template task to be

added with all of its children items below

Delete Task - Highlight the task in the tree view to delete it

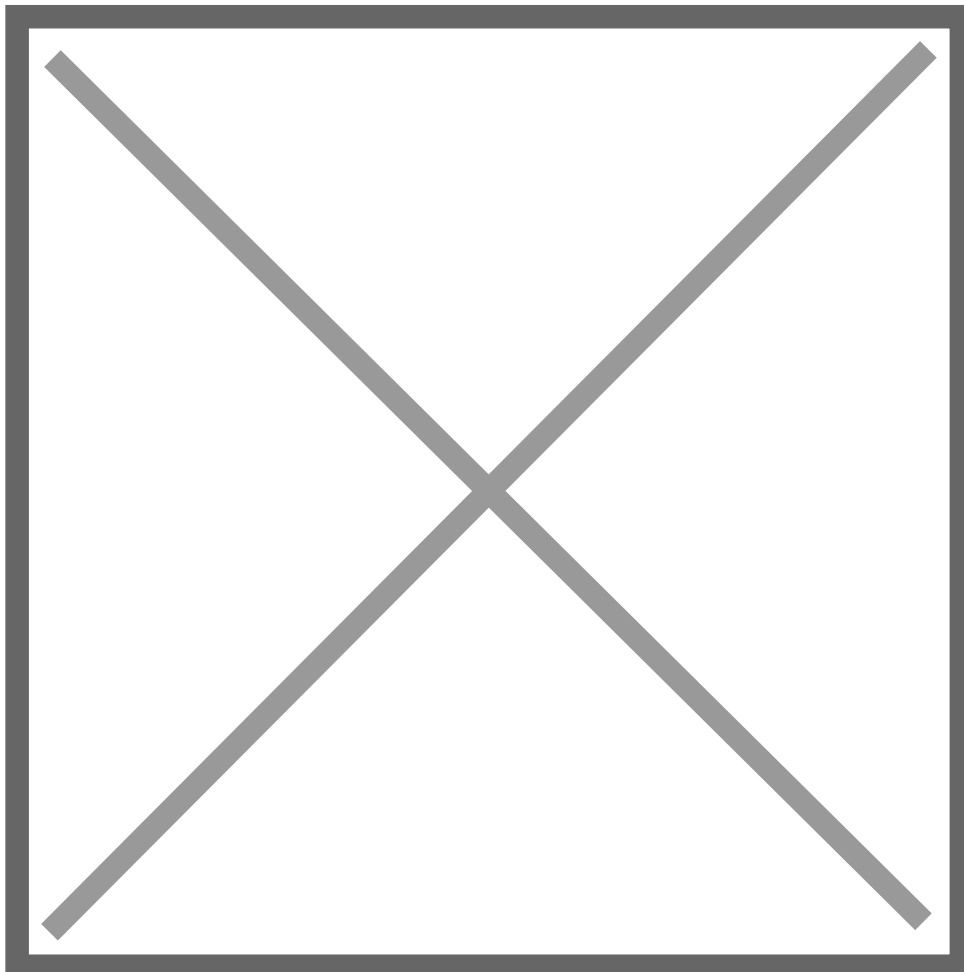
After right clicking on the tree view and then selecting the Add Stock Task option the following window comes up.



When you click on the save button, you will be brought back to the Template task detail with a new heading under the Main heading.

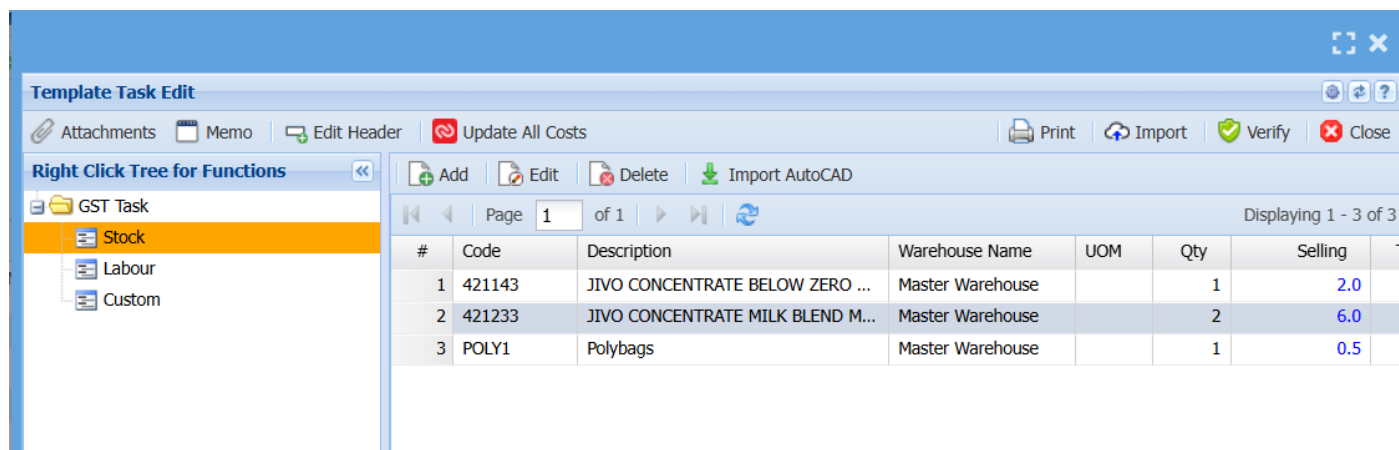
To add stock click on the "PC Stock" header.

Select your stock items and the quantity that is required to complete this task.



We have now added many stock items to the parent stock task.

After setting up your task click on the close button to be taken back to the Template task search screen.



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