

Using Task Groups with Templates

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You can link a task group to an assembly line item. When that item is used on an order, it will create a job which will auto-generate the tasks from the task group. This is useful in a manufacturing setting, when there are a series of well-defined steps that necessary to manufacture a particular product. It can also be leveraged to incorporate a series of sales tasks to be completed when a particular product is sold.

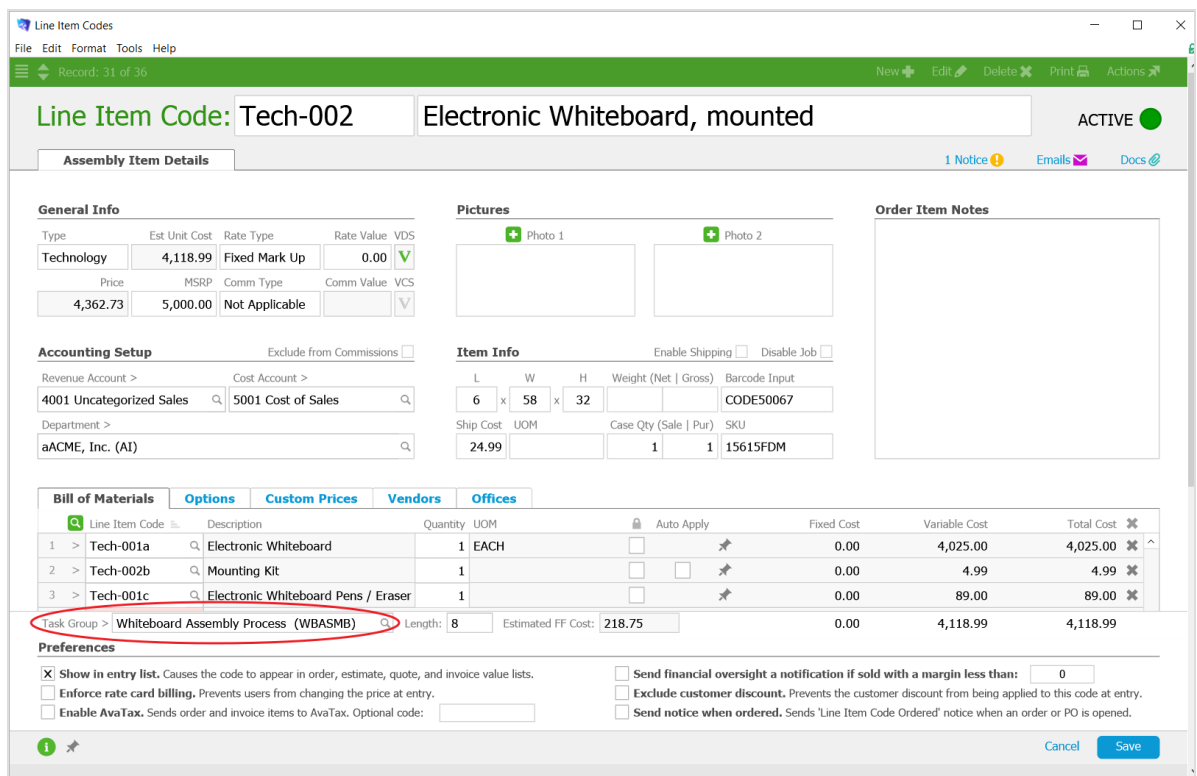
Configuring this setup requires several steps:

First, [build the template](#) . It should include all the line items that could be used for a certain type of order. (When your personnel [create an order from the template](#) , they can edit the line items to match the client's exact request.)

Second, [create the task group](#) .

Third, link the task group to a line item:

1. Create a new assembly item line item code.
2. On the new line item code, click the **Task Group** field.




3. Click **Save**.

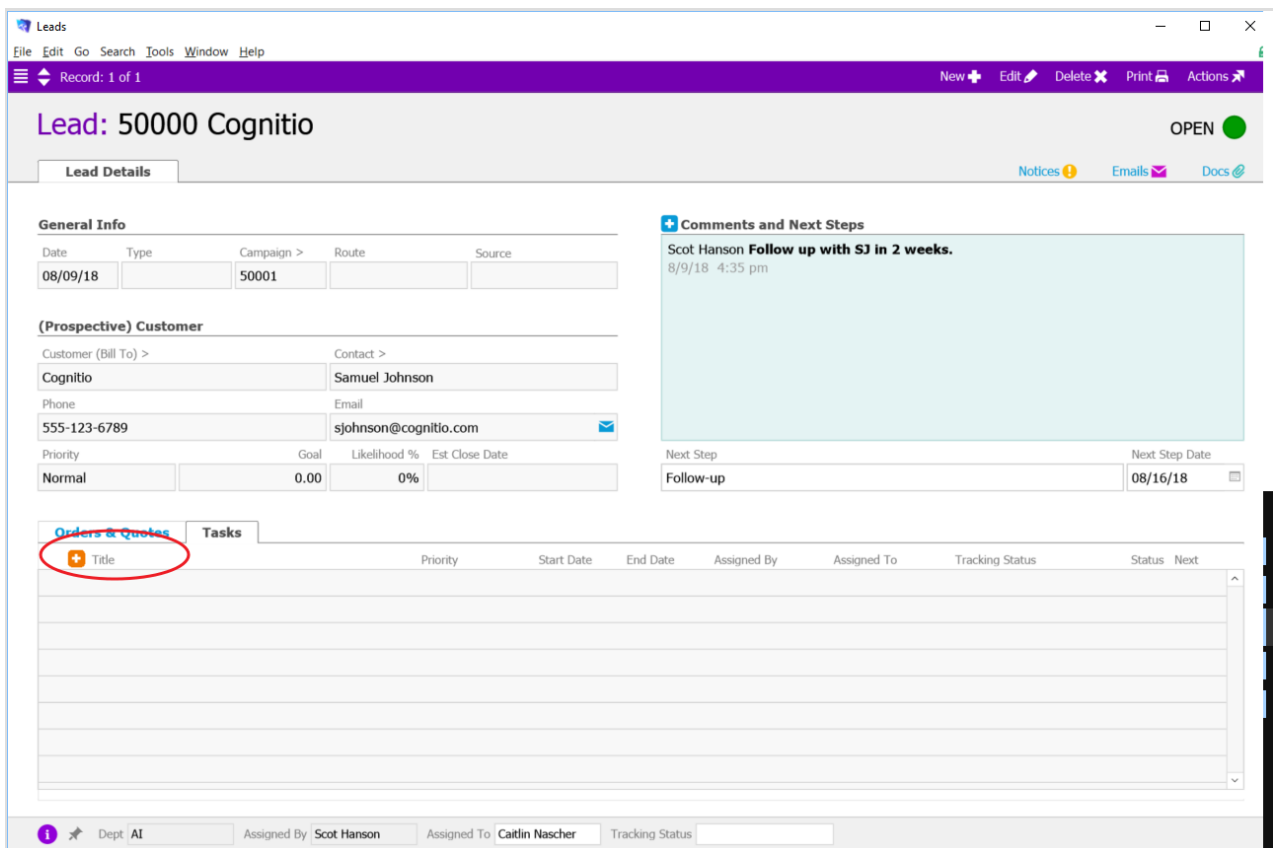
Finally, add the new line item code to the template:

1. Navigate to **Order Setup > Templates**.
2. Use the [Quick Search](#) bar to locate the desired template.
3. In the menu bar, click **Edit**.
4. In the Items list, add the new line item code.
5. Click **Save**.

After this preparation, each time your personnel use the template to build and open an order, the task group will create a set of jobs to accomplish as part of the order. These are displayed on the Order's Fulfillment tab.

Manually Triggering a Task Group

You can manually trigger the creation of tasks based on a task group from any screen where there is a Tasks tab (i.e. Leads, Orders, and Jobs). At the top of the tab is an orange Plus () button:



Clicking this Plus button displays two options. Click **Tasks from Task Group** to choose which task group you want to immediately build tasks from.

Similarly, if you create a new lead, and the Lead Type matches the name of a task group, it will automatically generate tasks based on that task group. For example, with a task group called "Trade Show," any lead with the type "Trade Show" would automatically get that series of tasks.
