

Branch Admin

The below mentioned list should be created, saved, and shared with the respective roles. Any of these lists can be customized with additional filters to focus the list on specific branches, divisions, sales reps, account managers, etc. In several of the advanced search list screenshots below, you will see the filter “Current User”. This will filter the results to the user who is logged in and viewing that list. You can swap out “Current User” with your actual name if preferred. Display columns, sorting, and grouping is at the user’s discretion. These lists should be managed on regular intervals determined on your specific needs.



Activities

- My Open Tasks
- My Open Issues
- Overdue Tasks
- Overdue Issues

Contacts

- Active Employee
- Active Customers

Properties

- Active Customers

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- Opportunities in process after end date

Work Ticket

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Activities – My Open Tasks

Concept - This list shows all of your tasks that have not been completed. Tip* display and sort by due date.

Action – If task is complete, check the green check box in the bottom right corner.

Filter Display Sort Group

Condition (Optional) Example: 1 AND (2 OR 3)

Order #	Field Name	Filter Type	Value	
1	Assigned To Contact	In	{Current User} X	X
2	Activity Type	In	Task X	X
3	Status	In	Open X	X

Activities – My Open Issues

Concept - This list shows all of your issues that have not been completed. Tip* display and sort by due date.

Action – If issue is complete, check the green check box in the bottom right corner.

The screenshot shows a filter configuration window with the following structure:

Order #	Field Name	Filter Type	Value	
1	Assigned To Contact	In	(Current User) X	X
2	Activity Type	In	Issue X	X
3	Status	In	Open X	X

Activities – Overdue Tasks

Concept - This list shows all overdue tasks that are in open status past their due date. Tip* display and sort by due date and group by “Created by”

Action – If task is complete, check the green check box in the bottom right corner.

The screenshot shows a filter configuration window with the following structure:

Order #	Field Name	Filter Type	Value	
1	Activity Type	In	Task X	X
2	Due Date	Through Yesterday		X
3	Status	In	Open X	X

Activities – Overdue Issues

Concept - This list shows all overdue issues that are in open status past their due date. Tip* display and sort by due date and group by “Created by”

Action – If issue is complete, check the green check box in the bottom right corner.

The screenshot shows a filter configuration window with the following structure:

Order #	Field Name	Filter Type	Value	
1	Activity Type	In	Issue X	X
2	Due Date	Through Yesterday		X
3	Status	In	Open X	X

Contacts - Active Employees

Concept – This list shows all active employees. This list can be used to manage employee’s HR information, contact info, and to maintain accurate employee counts. Tip* Group by job title.

Action – Verify accuracy of employee contact information, count, and activity.



Contacts - Active Customers

Concept – This list shows all active customers. This list can be used to manage customer contact information, status (contact type), and general CRM. Tip* Display new task, new appt, new email, and new issue to quickly create activities regarding these customers.

Action – Bulk email customers, manage contact type/status, and general CRM activities.



Properties - Active Customers

Concept – This list is used to view all active customers. This list can be used to manage customer property information, status, and general CRM activities. Tip* Display new task, new appt, new email, and new issue to quickly create activities regarding the properties. Group by property status.

Action – Manage status, property details, and create general CRM activities.



Opportunity - Opportunities in process after end date

Concept – This list should be maintained as close to zero as possible and is used to identify opportunities that should be in a complete status based on the opportunity end date that are still in production. The opportunities that display in this list can create revenue discrepancies.

Action - Drill into the opportunity work tickets to review which tickets are not completed or cancelled. Complete or cancel as necessary.

Order #	Field Name	Filter Type	Value
1	End Date	Through Yesterday	
2	Job Status	Not In	Complete X, Cancelled X, I

Work Tickets - Completed Work Tickets (This Month)

Concept – This list is used to verify weekly efficiencies, costs, and to compare the difference between the anticipated start date and completed date. Compare gross margin %, drive time %, anticipated start date, est vs act labor, materials, equipment, sub, and other costs. Tip* Group by crew leader.

Action – Question hour discrepancies, cost variances, excessive drive time. Verify that the correct ticket was completed by comparing anticipated start date vs completed date. Adjust status, time entry, and ticket costs as necessary.

Order #	Field Name	Filter Type	Value
1	Completed Date	This Month	

Work Tickets - Scheduled Work Tickets Without Future Visits

Concept - This list should be maintained as close to zero work tickets as possible. This list shows work tickets that have been scheduled at some point in the past, with no future visits scheduled for return to complete the work.

Action - Complete the work ticket or schedule a future visit.

Advanced Search | Incomplete Work Tickets

Filter: Order | Sort | Group

Condition (Optional) Example: 1 AND (2 OR 3)

Order #	Field Name	Filter Type	Value
1	Work Ticket Status Code	In	Completed X
2	Scheduled Staff Date	Through Yesterday	
3	Future Visits	Equals	

Purchasing - Aging New Purchase Receipts

Concept – This list shows purchase receipts that could potentially be received. Purchase can be ok if not received, as long as the order is still relevant and/or not truly received.

Action – Leave be if the purchase order is still pending receipt. If materials are in possession, receive the receipt. If the receipt is no longer relevant, delete the receipt.

Filter: Display | Sort | Group

Condition (Optional) Example: 1 AND (2 OR 3)

Order #	Field Name	Filter Type	Value
1	Created Date	Through Last Month	
2	Receipt Status Name	In	New X

Purchasing – Received Purchase Receipts

Concept – This list shows received purchase receipts awaiting the vendor invoice and approval to be sent to accounting. Tip* Display/sort by received date and group by “Created By” for more transparency in the list results.

Action – Upon receiving the invoice, add invoice date, invoice #, correct the item prices, add extra cost if applicable, and approve.

Filter: Display | Sort | Group

Condition (Optional) Example: 1 AND (2 OR 3)

Order #	Field Name	Filter Type	Value
1	Receipt Status Name	In	Received X

Weekly Time Review - Not Exported

Concept – This list shows all time not exported. The user can toggle between weeks using the date selector or blue arrows. Depending on the payroll period cutoff date, a deadline should be identified for when the prior weeks' time should all be in an exported status.

Action – Any time found not exported after the cut off date should be reviewed with that employee's manager. The time should ultimately be approved and exported or deleted.

The screenshot shows a filter configuration window with a table for defining filter conditions. The table has four columns: Order #, Field Name, Filter Type, and Value. The first row is populated with Order # 1, Field Name 'Status', Filter Type 'Selected Equal', and Value 'Exported'. There is a red 'X' icon in the top right corner of the table area.

Order #	Field Name	Filter Type	Value
1	Status	Selected Equal	Exported

Invoice Batches - Pending Invoice Batches

Concept – This list shows all invoice batches in a pending status. In this status, the invoices are out of invoicing assistant, but have not been printed or emailed to the predetermined contacts. In this status, the invoice can still be modified and reviewed by the account manager or operations manager of the property.


Action – Review the invoices within the invoice batch to verify accuracy and amount totals. When all invoices have been reviewed, complete the batch, choose the format, and print/email to the predetermined contacts.

The screenshot shows a filter configuration window with a table for defining filter conditions. The table has four columns: Order #, Field Name, Filter Type, and Value. The first row is populated with Order # 1, Field Name 'Date Completed', Filter Type 'Custom - is Null', and Value is empty. There is a red 'X' icon in the top right corner of the table area.

Order #	Field Name	Filter Type	Value
1	Date Completed	Custom - is Null	

Receivables - Open A/R

Concept – This list shows all open accounts receivable. The balances are determined by the companies total unpaid invoice amounts less nonapplied credits and payments. Tip* display the "add payment" to easily apply payments from the list.

Action – Apply new payment by clicking the add payment icon. 

The screenshot shows a filter configuration window with a table for defining filter conditions. The table has four columns: Order #, Field Name, Filter Type, and Value. The first row is populated with Order # 1, Field Name 'Balance', Filter Type 'Does Not Equal', and Value is empty. There is a red 'X' icon in the top right corner of the table area.

Order #	Field Name	Filter Type	Value
1	Balance	Does Not Equal	

Payments - Payments to Deposit

Concept – This list shows all payments that have not been added to a deposit.

Action – Check the box to the left of the payment row or use the bulk check box  and create the deposit on the gear in the lower right corner.



Order #	Field Name	Filter Type	Value
1	Payment Type	Set to	Credit Memo #
2	Deposited	Equal	No

Deposits - New Deposits

Concept – This list shows all deposits that have not been sent to the accounting system.

Action – Drill into the deposit, verify the total, and “Send to Accounting” on the gear in the lower right corner.



Order #	Field Name	Filter Type	Value
1	Deposit Status	Equal	New

Reports – Revenue Over Under Report O/U – Excluding Zero

Concept – This list shows all opportunities that have a difference between the total amount earned and the total amount invoiced on the opportunity. Opportunities should not have an over/under once they are completed and fully invoiced. This list can identify situations to invoice customers for completed work, ensure operations is maintaining their tickets, and confirm the accuracy of the revenue reporting at the end of month.

Action – Invoice customers where earned is greater than invoiced. Complete tickets when applicable if invoiced is greater than earned.



Order #	Field Name	Filter Type	Value
1	Over/Under	Does Not Equal	

Inventory – Excluding Zero

Concept – This list shows all items in inventory that have a positive or negative quantity. Purchases into inventory create positive values. Allocations out to work tickets decreases inventory. Aspire allows negative quantities when the allocations out exceed the purchased quantities in.

Action - True up the on hand quantity at the end of each month. Adjustments to the on hand quantity will create journal entries on the EOM inventory tab. Increases to the on hand quantity will credit COGS and debit inventory holding. Decreases will debit COGS and credit inventory holding.

The screenshot shows a filter configuration window with the following fields:

Order #	Field Name	Filter Type	Value
1	Quantity	Does Not Equal	

Certifications – Expiring Through This Week

Concept – This list shows all certifications of with an expiration date through this week. Tip* periodically switch the filter to see near future expiring certifications.

Action – Update new certification and expiration dates where applicable.

The screenshot shows a filter configuration window with the following fields:

Order #	Field Name	Filter Type	Value
1	Expiration Date	Through This Week	

Employee Incidents – Created or Modified This Week

Concept – This list shows all incidents created this week. Tip* group by employee incident type and display created by.

Action – Review employee incidents for comments, updates, and follow up where necessary.

The screenshot shows a filter configuration window with the following fields:

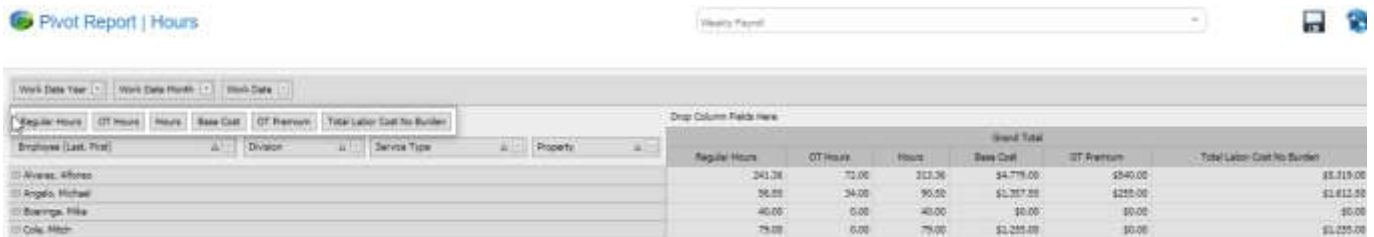
Order #	Field Name	Filter Type	Value
1	Created Date	This Week	
2	Last Modified Date	This Week	

Condition Required

Hours Pivot – Last Weeks Payroll

Concept – This hours pivot report shows a breakdown of the total payroll for the prior week. This report will assist in reconciling payroll and can also provide detailed pay code information by employee. Tip* Division, service type, and property can be temporarily moved left or right for different grouping views.

Action – Verify that the payroll total matches the actual payroll register. Review the burden percentage to ensure the estimated burden in Aspire is close to the actual burden percent provided by the payroll register.



The screenshot shows the 'Pivot Report | Hours' interface. At the top, there is a search bar for 'Weekly Payroll'. Below it, there are filters for 'Work Date Year', 'Work Date Month', and 'Week Date'. The main table has columns for 'Regular Hours', 'OT Hours', 'Hours', 'Base Cost', 'OT Premium', and 'Total Labor Cost No Burden'. The table lists employees: Alvarez, Alton; Angelo, Michael; Boringa, Mike; and Cole, Mitch. The 'Grand Total' row shows: Regular Hours: 243.28, OT Hours: 73.00, Hours: 316.28, Base Cost: \$4,779.00, OT Premium: \$240.00, Total Labor Cost No Burden: \$5,019.00.

Employee (Last, First)	Regular Hours	OT Hours	Hours	Base Cost	OT Premium	Total Labor Cost No Burden
Alvarez, Alton	341.28	73.00	414.28	\$4,779.00	\$240.00	\$5,019.00
Angelo, Michael	36.00	34.00	70.00	\$1,267.00	\$225.00	\$1,492.00
Boringa, Mike	40.00	0.00	40.00	\$0.00	\$0.00	\$0.00
Cole, Mitch	75.00	0.00	75.00	\$1,245.00	\$0.00	\$1,245.00
Grand Total	243.28	73.00	316.28	\$4,779.00	\$240.00	\$5,019.00

Application Configuration - Pending Devices

Concept – This list shows all devices that are pending access to Aspire. Once the administrator has approved the device, Aspire will place a cookie on that device for that specific browser. Tip* Device name consistency is important so the administrator can see who and what they are authorizing. For Example (John Smith Laptop Chrome)

Action - Automatic approval emails will be sent to each system administrator, but this area can be used to approve or deny devices manually.



The screenshot shows the 'Application Configuration - Pending Devices' interface. It features a search bar for 'Condition (Optional)' with an example '1 AND 2 OR 3'. Below is a table with columns: 'Order #', 'Field Name', 'Filter Type', and 'Value'. The table contains three rows:

Order #	Field Name	Filter Type	Value
1	Active	Equals	No
2	Approval Date	Custom - Is Null	
3	Approval Renewal Date	Custom - Is Null	

Application Configuration - Active Users

Concept – This list shows all contacts in Aspire that are active users in the system.

Action – Verify all active users listed are truly employed or should have access to Aspire. In addition to the users specific contact page, this area can be used to reset pins and passwords. Inactivate all unauthorized users (past employees)



The screenshot displays a configuration window for filters. At the top, there are tabs for 'Filter', 'Display', 'Test', and 'Group'. Below the tabs, the text 'Condition (System)' is visible, followed by a search box containing 'Example: 1 AND (2 OR 3)'. The main area contains a table with the following structure:

Order #	Field Name	Filter Type	Value
1	Active	Equals	Yes

Below the table, there is an empty input field for adding a new filter. A red 'X' icon is located in the bottom right corner of the configuration area.