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

Opportunity

- Opportunities in process after end date

Work Ticket

- Completed Work Tickets (This Month)
- Scheduled Work Tickets Without Future Visits

Purchasing

- Aging New Purchase Receipts
- Received

Weekly Time Review

- Last week – Time not in exported

Invoice Batches

- Pending Invoice Batches

Receivables

- Open A/R

Payments
- Payments to Deposit

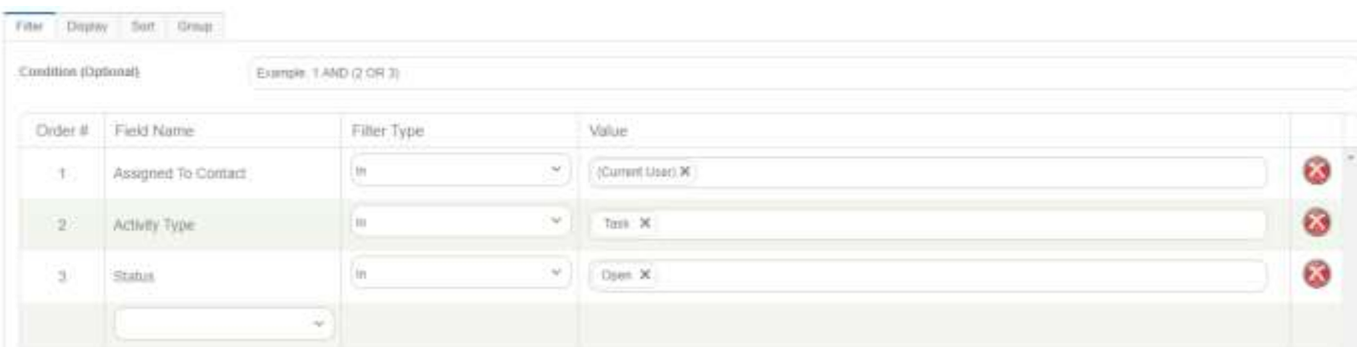
Deposits
- New Deposits

Reports
- Inventory – Excluding Zero
- Certifications – Expiring Through This Week
- Employee Incidents – Created or Modified This Week

Application Configuration
- Pending Devices
- Active Users

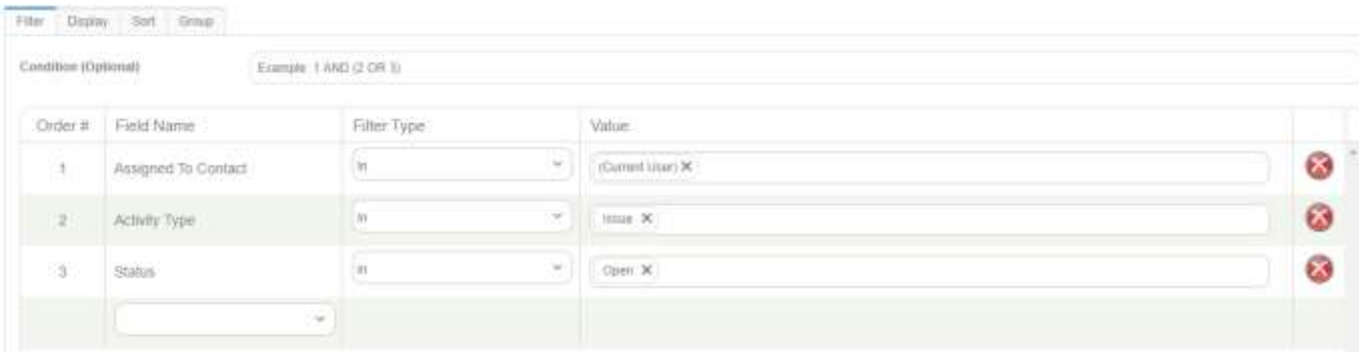
Activities – My Open Tasks

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.



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.



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.

Activities – Overdue Issues

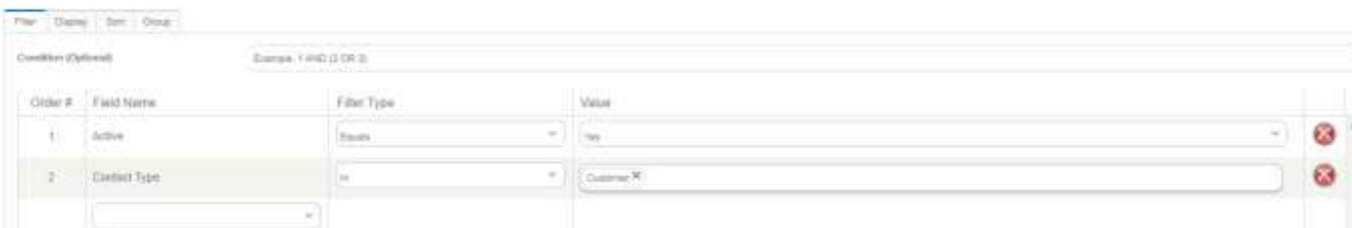
Concept - This list shows all overdue issues that are in open status past their due date. Tip* display and sort by due date and group by "Created by"
Action – If issue is complete, check the green check box in the bottom right corner.

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.

<u>Opportunity - Opportunities in process after end date</u>

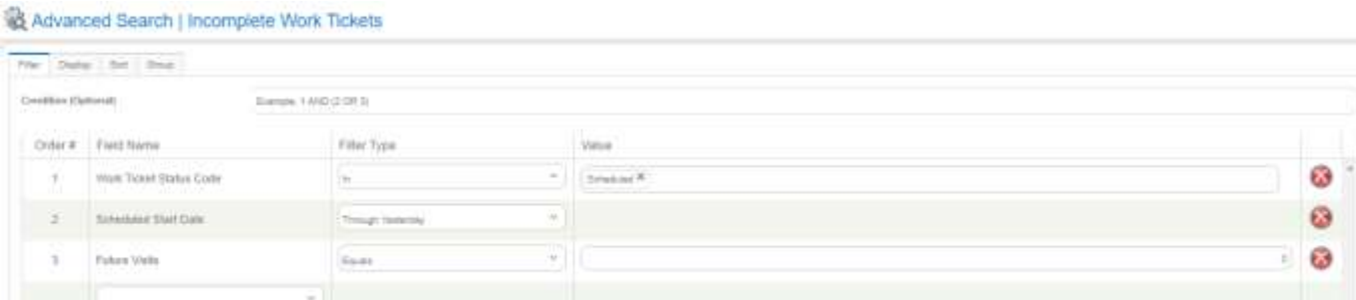
Concept – This list should be maintained as close to zero as possible and is used to identify opportunities that should be in a complete status based on the opportunity end date that are still in production. The opportunities that display in this list can create revenue discrepancies.
Action - Drill into the opportunity work tickets to review which tickets are not completed or cancelled. Complete or cancel as necessary.

<u>Work Tickets - Completed Work Tickets (This Month)</u>

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.

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.



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.

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.

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.

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.

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. 

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.

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.

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 were earned is greater than invoiced. Complete tickets when applicable if invoiced is greater than earned.

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.

Certifications – Expiring Through This Week

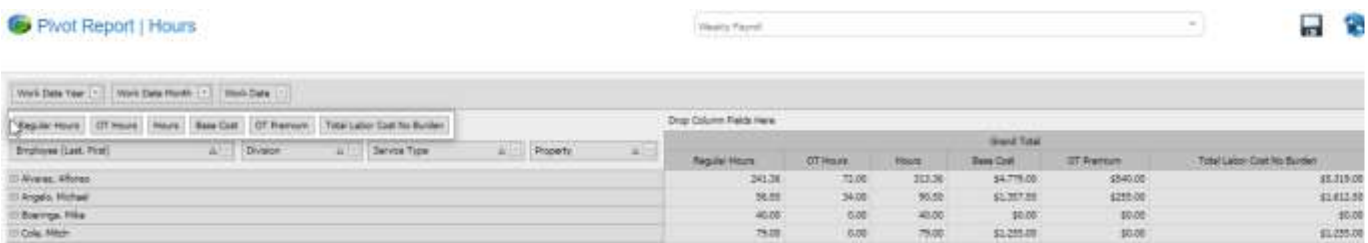
Concept – This list shows all certifications of with an expiration date through this week. Tip* periodically switch the filter to see near future expiring certifications.
Action – Update new certification and expiration dates where applicable.

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.

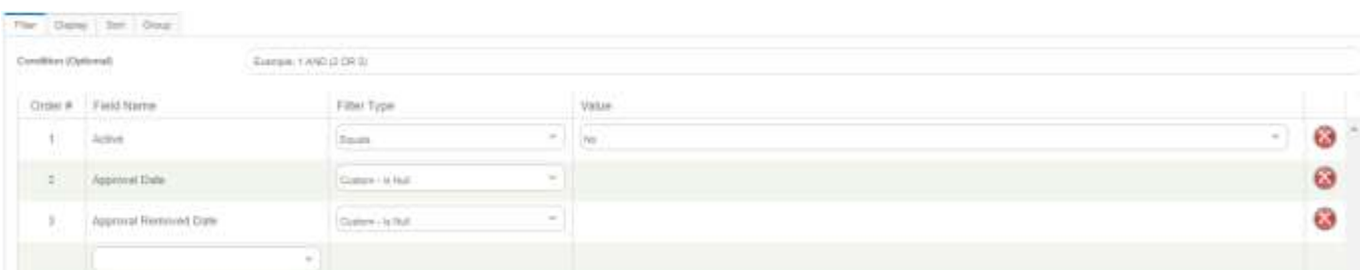
Hours Pivot – Last Weeks Payroll

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.



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 used to approve or deny devices manually.



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)