

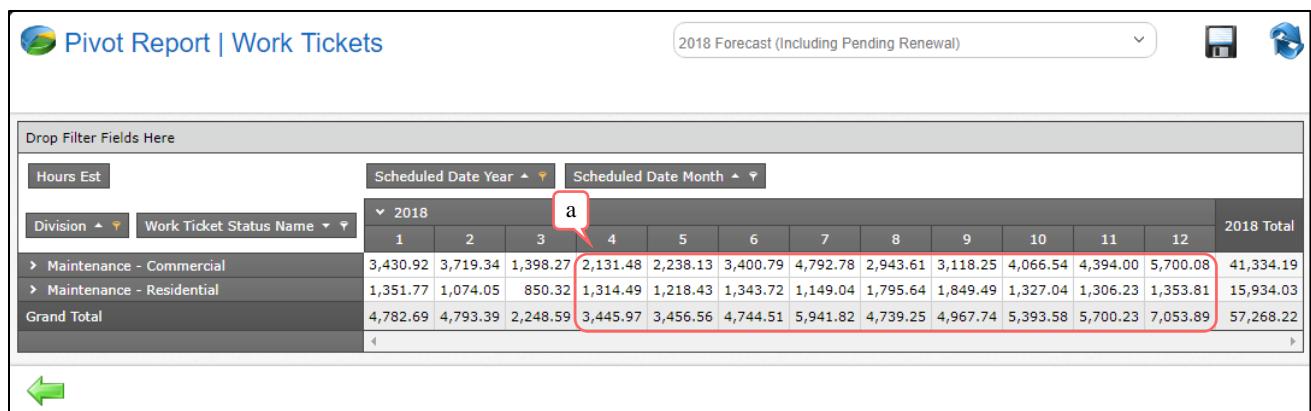
Forecasting Renewals with the Work Ticket Pivot Report

The *Work Ticket Pivot Report* available on the *Reports* screen, can be used to forecast revenue or hours for the following twelve months based on potential and actual renewals. Aspire summarizes data for the pivot reports every night. When summarizing information for the *Work Ticket Pivot Report*, Aspire generates pseudo work ticket records¹ for the next twelve months representing renewals for opportunities that you have not yet renewed. Understanding this behavior will help you create forecasts using this report.

When generating pseudo work tickets, Aspire considers the following:

- Pseudo work tickets are not generated for opportunities that have been cancelled or lost.
- Pseudo work tickets are not generated if you have already won the renewal contract for the upcoming year.
- The work ticket status for the pseudo work tickets is set to “Pending Renewal”.
- The work ticket number assigned to these work tickets matches the work ticket number on the existing ticket for the current year.
- Forecasting is only provided for the next twelve months.
- During the first half of a given year, Aspire generates pseudo tickets for any appropriate contracts whose end date was in the prior year or in the current year. After July 1, Aspire generates pseudo tickets for any appropriate contract whose end date is in the current year dropping off those opportunities in the prior year that you will likely not renew.

The following image provides an example of a pivot report showing estimated hours for the current year. The report is being generated in March, but the generated pseudo work ticket records fill in a reasonable forecast for later months^a as existing opportunities would otherwise be dropping off based on their end-date.



Drop Filter Fields Here		2018 Forecast (Including Pending Renewal)												
Hours Est	Scheduled Date Year	Scheduled Date Month												
Division	Work Ticket Status Name	2018												2018 Total
		1	2	3	4	5	6	7	8	9	10	11	12	
> Maintenance - Commercial		3,430.92	3,719.34	1,398.27	2,131.48	2,238.13	3,400.79	4,792.78	2,943.61	3,118.25	4,066.54	4,394.00	5,700.08	41,334.19
> Maintenance - Residential		1,351.77	1,074.05	850.32	1,314.49	1,218.43	1,343.72	1,149.04	1,795.64	1,849.49	1,327.04	1,306.23	1,353.81	15,934.03
Grand Total		4,782.69	4,793.39	2,248.59	3,445.97	3,456.56	4,744.51	5,941.82	4,739.25	4,967.74	5,393.58	5,700.23	7,053.89	57,268.22

¹ Pseudo work ticket records are only reflected in the Work Ticket Pivot report

This is demonstrated in the diagram below by expanding the pivot table to display the *Work Ticket Status Names* to show the values represented by the *Pending Approval* pseudo work tickets.

Pivot Report | Work Tickets 2018 Forecast (Including Pending Renewal)

Drop Filter Fields Here

Hours Est Scheduled Date Year Scheduled Date Month

Division	Work Ticket Status Name	2018												2018 Total
		1	2	3	4	5	6	7	8	9	10	11	12	
Maintenance - Commercial	Scheduled	119.88	1,873.58	547.58	432.72	410.76	353.44	280.54	295.86	240.43	997.55	882.49	659.97	7,094.80
	Pending Renewal	0.00	0.00	56.14	700.20	1,088.03	1,273.03	1,633.64	2,289.31	2,325.75	1,564.39	1,681.14	1,796.95	14,408.58
	Pending Approval	33.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	33.00
	Open	221.81	1,370.36	584.33	805.57	614.94	1,692.32	2,569.23	250.48	475.57	1,204.64	1,294.63	3,227.16	14,311.04
	Complete	2,645.02	216.47	2.50	64.00	17.65	0.00	0.00	0.00	2.50	0.00	0.00	0.00	2,948.14
Maintenance - Commercial Total		3,430.92	3,719.34	1,398.27	2,131.48	2,238.13	3,400.79	4,792.78	2,943.61	3,118.25	4,066.54	4,394.00	5,700.08	41,334.19
Maintenance - Residential	Scheduled	64.02	702.78	288.20	235.87	203.72	155.04	164.57	141.76	112.26	183.89	116.68	71.51	2,440.30
	Pending Renewal	1.25	4.00	4.00	162.36	433.87	587.09	615.02	790.35	901.18	908.25	816.83	783.15	6,007.35
	Pending Approval	32.67	1.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.17
	Open	81.76	96.33	285.17	636.26	383.37	503.49	286.45	706.16	689.68	137.59	338.64	406.42	4,551.32
	Complete	1,005.23	70.15	0.00	0.00	0.00	0.00	0.00	16.00	0.00	0.00	0.00	0.00	1,091.38
Maintenance - Residential Total		1,351.77	1,074.05	850.32	1,314.49	1,218.43	1,343.72	1,149.04	1,795.64	1,849.49	1,327.04	1,306.23	1,353.81	15,934.03
Grand Total		4,782.69	4,793.39	2,248.59	3,445.97	3,456.56	4,744.51	5,941.82	4,739.25	4,967.74	5,393.58	5,700.23	7,053.89	57,268.22