

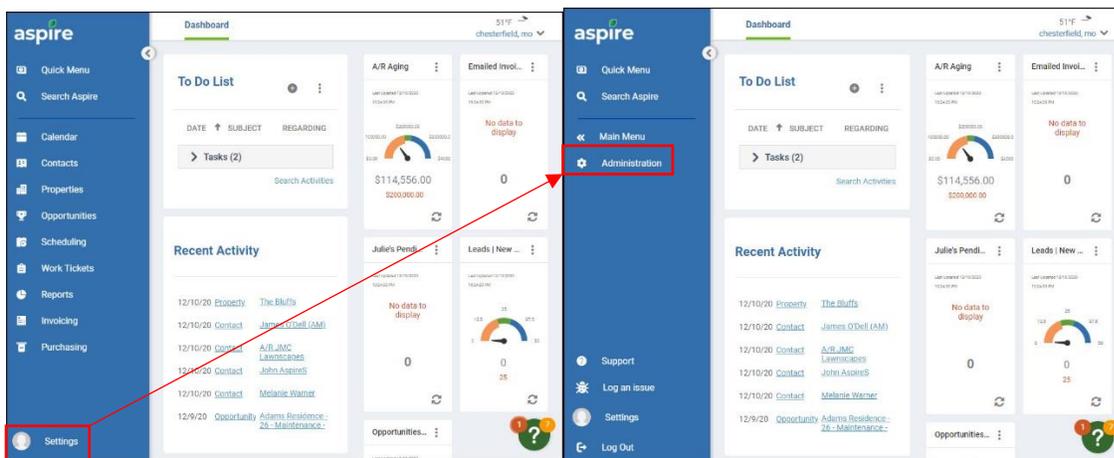
Creating a Service

Purpose: Services are the work estimated and performed as a part of a Workorder or Contract Opportunity. Services must exist in the service catalog before they can be added to an estimate on an opportunity.

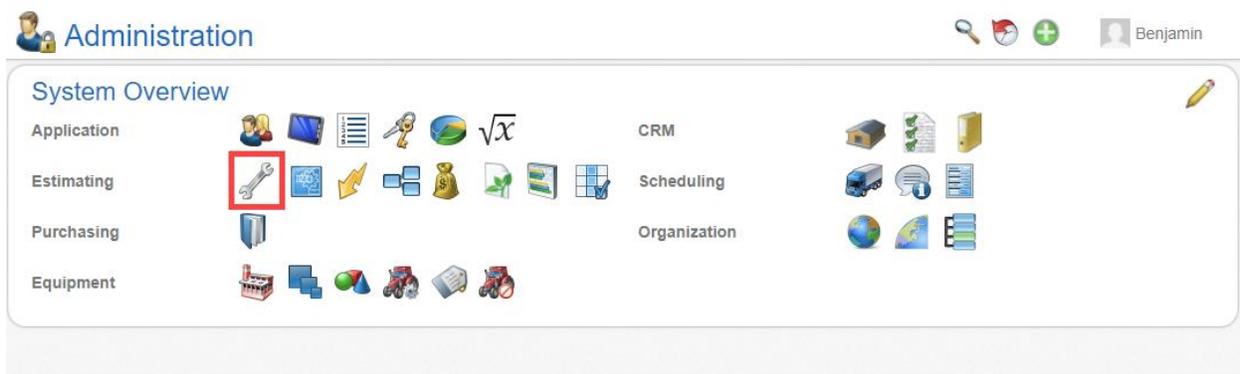
Prerequisites:

1. Admin access
2. Branch admin, with *Enhanced Branch Admin Security*

To create a new Search Formula, follow these steps:



1. Click on Settings on the main menu.
2. Click on Administration.



3. Click on Manage Services.

Search Services... Default Search [System]

Drag a column header and drop it here to group by that column

<input checked="" type="checkbox"/> / <input type="checkbox"/>	Service Name ^	Service Type Name	Division Name
<input type="checkbox"/>	EN - Install Fall Color	Enhancement	Enhancement
<input type="checkbox"/>	EN - Drainage Services	Enhancement	Enhancement
<input type="checkbox"/>	EN - Hardgoods Enhancement	Enhancement	Enhancement
<input type="checkbox"/>	EN - Install Annual Grasses	Enhancement	Enhancement
<input type="checkbox"/>	EN - Install Spring Bulbs	Enhancement	Enhancement
<input type="checkbox"/>	EN - Install Spring Color	Enhancement	Enhancement
<input type="checkbox"/>	EN - Mulch	Enhancement	Enhancement
<input type="checkbox"/>	EN - PHC IPM	Enhancement	Enhancement

1 2 3 4 5 6 7 8 1 - 20 of 150 items



4. Click on the Green plus.

 Service | ****New****

Service Name	<input type="text" value="MT - Mulch Trees, Shrubs & Beds w/ Hardwood Fall"/>	Active	<input checked="" type="checkbox"/>
Display Name	<input type="text" value="Mulch Trees, Shrubs & Beds w/ Hardwood Fall"/>	Contract Service	<input checked="" type="checkbox"/>
Abbreviation	<input type="text" value="Mulch Hardwood Fall"/>	Requires Approval	<input type="checkbox"/>
Service Type	<input type="text" value="Maintenance Mulching"/>	Multi-Visit	<input type="checkbox"/>
Branch	<input type="text" value="All Branches"/>	Service Schedule	<input type="text" value="None"/>
Taxable Items	<input type="text" value="Material"/>	Default Paycode	<input type="text" value="None"/>
Minimum Charge	<input type="text" value="\$0.00"/>	Workers' Comp Code	<input type="text" value="None"/>
Sort Order	<input type="text" value="0"/>		
Form	<input type="text" value="None"/>		

5. Type in the Service Name. The Display Name automatically fills in. The Display Name is how the service name displays on proposals and invoices.
Note: Aspire recommends adding an abbreviated division prefix before the Service Name. This helps estimators associate the service to the division. Remove the prefix from the display name.
6. Type in an abbreviation. This is limited to 20 characters and is how the service name is displayed to the crew leader on Mobile Time.
7. Select the appropriate service type. This is how the service gets assigned to a division. Click [here](#) for more information on creating service types.
8. Select the specific branch where the service will be available or leave it blank if available for all branches. This field is only available when the advanced branch security permission is set in the company configuration page.
9. Select the item types that are taxable.
10. If desired, enter a minimum charge that Aspire can recommend for the service.
11. If desired, enter in a sort order. This affects the order in which services are added to the Route Screen as well as reorder services on a contract opportunity once the estimate is saved.
For example: Services entered for Snow could have three services with a sort order: Snow Plow 1-3"(10), Snow Plow 4-6"(20), Snow Plow>6(30). If an estimator selects, Snow Plow 4-6, Snow Plow 1-3, and Snow Plow>6(30), then once the estimate is saved, the services will be reordered to Snow Plow 1-3"(10), Snow Plow 4-6"(20), Snow Plow>6(30).

12. If desired, select a form for the Crew Leader to complete once a work ticket has been completed.
Click [here](#) for more information on creating a form and assigning it to a service.
13. Check the box if the service should be available on Contracts too. All services are available on Work Orders.
14. If desired, check the box to require approval before the ticket can be invoiced.
Note: Aspire recommends all T&M services to require approval. Ex) Irrigation Repairs
15. Multi-Visit allows crew leaders to complete the work ticket, which prompts a form, without putting the work ticket in complete status. It also allows auto expenses for subcontractors to be purchased per time-period rather than requiring that the work ticket be complete.
16. Service Schedules are used to forecast the anticipated start date of a service. It is common to have multiple service schedules for the same service. A routine mowing service may have a service schedule for 52, 32, 28, 26, 14, etc., occurrences.
Note: a best practice is to set at least one service schedule on every maintenance service.
17. Default pay code is used to specify a particular pay code associated with that service. This is commonly used for snow services since employees are often paid a premium for working on these types of services .
18. Workers' Comp Code can be used by a payroll provider to specify hours worked within the workers' comp code.
19. Service descriptions are commonly displayed on a proposal to further describe the service to a client.
20. Save