

As Needed Work Tickets and Services

Services are added to a contract opportunity during estimating. Later, when the client agrees to proceed with the work, you specify in Aspire that the opportunity is won. At the time that you win the opportunity, Aspire generates the appropriate number of work tickets based on the number of occurrences for each service on the opportunity.

Aspire supports a special attribute for opportunity services called *As Needed* that can be used for any T&M or Per Service invoice type service in a contract opportunity. If you choose the *As Needed* checkbox for an opportunity service while creating an estimate, tickets are not generated at the time that the opportunity is won as is usually the case¹. Rather, a production manager can schedule an *As Needed* ticket associated with that opportunity service for a crew. For scheduling purposes, “tickets” for as needed opportunity services show up in the ticket selection list with a ticket number of zero (0). When the production manager places the as needed ticket on the schedule board, Aspire generates a work ticket and assigns a non-zero ticket number. Time and materials are applied to that work ticket like any other ticket generated for a standard opportunity.

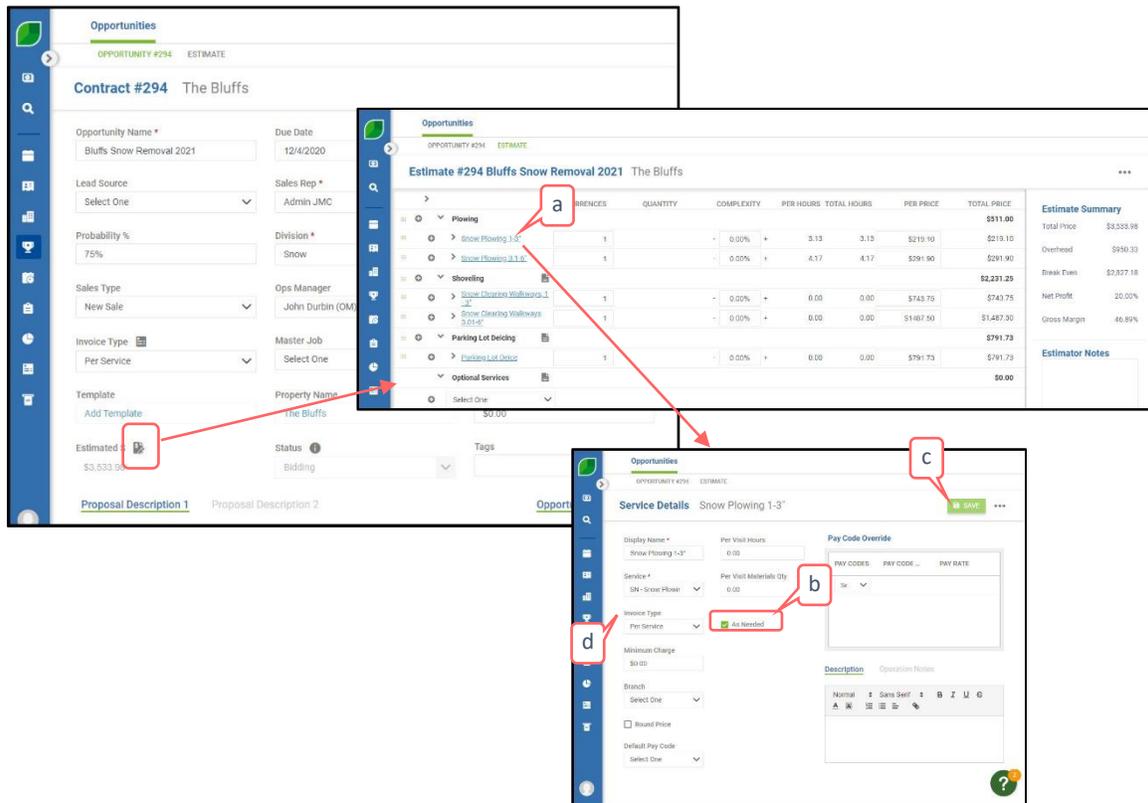
Services can be marked “as needed” during estimating and can only be marked “as needed” for *time and materials* or *per service* contracts – not for services on work orders or for fixed price services. Typical examples of when *As Needed* tickets are used, include:

- Snow-related services
- Irrigation repair services
- Additional mow services beyond the contracted amount

How to Set up As Needed Services

To set up a service that is “as needed”, drill into the appropriate opportunity service^a in the estimate on a contract as shown in the diagram below. Check the *As Needed* check box^b and click the *Save* icon^c. Remember that the invoice type for the opportunity service must be *Per Service*^d or *T&M* in order for the *As Needed* checkbox to be available. An opportunity service flagged in this manner is called an “*As Needed* opportunity service” – sometimes shortened to “*As Needed* service”.

¹ While no work ticket is generated, Aspire will display a representative line in the work ticket list on the schedule board with a ticket number of zero (0), allowing the as needed ticket to be scheduled and created as explained later in this article.



After you have created the *As Needed* service(s) on the contract and won the contract, Aspire will not automatically generate tickets like it does for other service opportunities that are not marked *As Needed*.

In the example above, each of the other services shown on the estimate would also be marked *As Needed* so that when a snow event occurs, you will be able to schedule a work ticket for the appropriate service based on snow accumulation. Note that the estimate is based on 5 occurrences of the 8-12" services since this is the expected snow-fall for the service area. Even so, Aspire will allow you to schedule any of the other opportunity services on the estimate at the time of the snow event.

Note that Aspire will allow you to go back into the opportunity service on a contract estimate after it has been won and check the *As Needed* checkbox. This can be valuable in the case where you run out of mowing ticket occurrences at the end of the season.

Creating *As Needed* Tickets

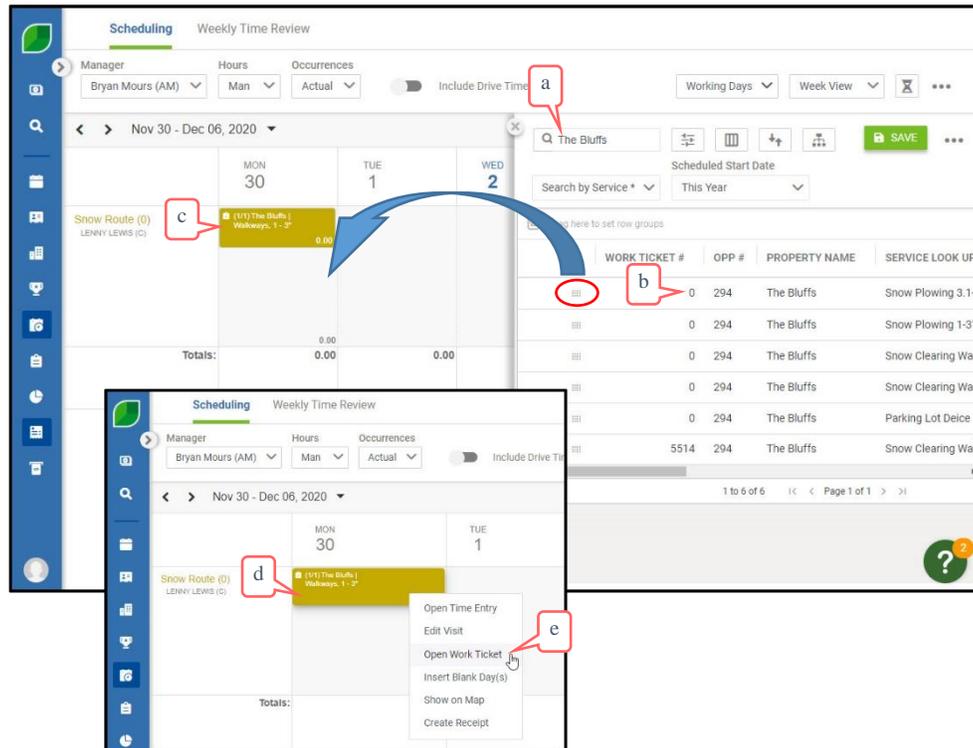
As Needed tickets are created in one of three ways:

1. By placing an *As Needed* opportunity service on the *Schedule Board*
2. Adding them from the *Time Entry* screen
3. Crew leader selecting one from the *Mobile App* (mTime)

4. Using the Schedule an Event function

Add As Needed Ticket on Schedule Board

As shown in the diagram below, you can filter on property name (“The Bluffs”) ^a to focus on the property for which we estimated *As Needed* opportunity services in the earlier example. Given appropriate filters, *As Needed* opportunity services show up in the work ticket list on the *Schedule Board* screen. Since the work ticket does not exist yet, the work ticket number in the search list shows as zero (“0”) ^b. You can drag ^c the opportunity service onto the *Schedule Board* by clicking on the 12 dot symbol on the left side of the ticket number. When you drop it onto the schedule board by releasing the mouse button, Aspire immediately creates the work ticket ^d. If you right click to view the popup menu for the newly created visit plaque and choose the *Open Work Ticket* option ^e, you can view the newly created work ticket.



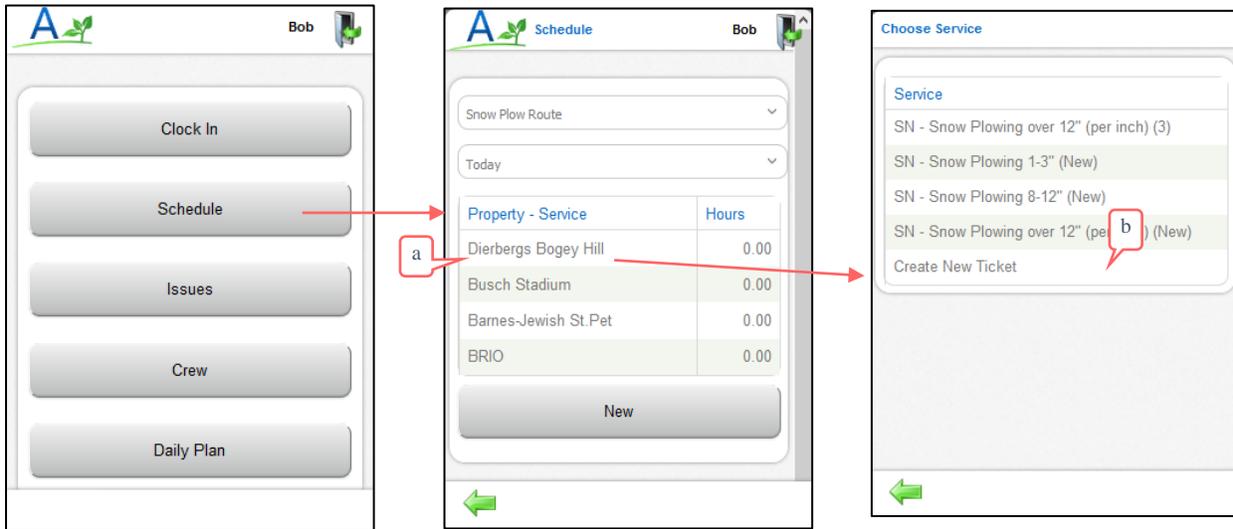
Add As Needed Ticket from Mobile Time App

The crew leader can create an *As Needed* work ticket from mTime on their mobile device provided the following conditions are met:

1. An opportunity with an *As Needed* opportunity service whose term of service includes the current date has been won.
2. The property has been made available to the crew leader’s route from the *Property* tab of the *Route* screen

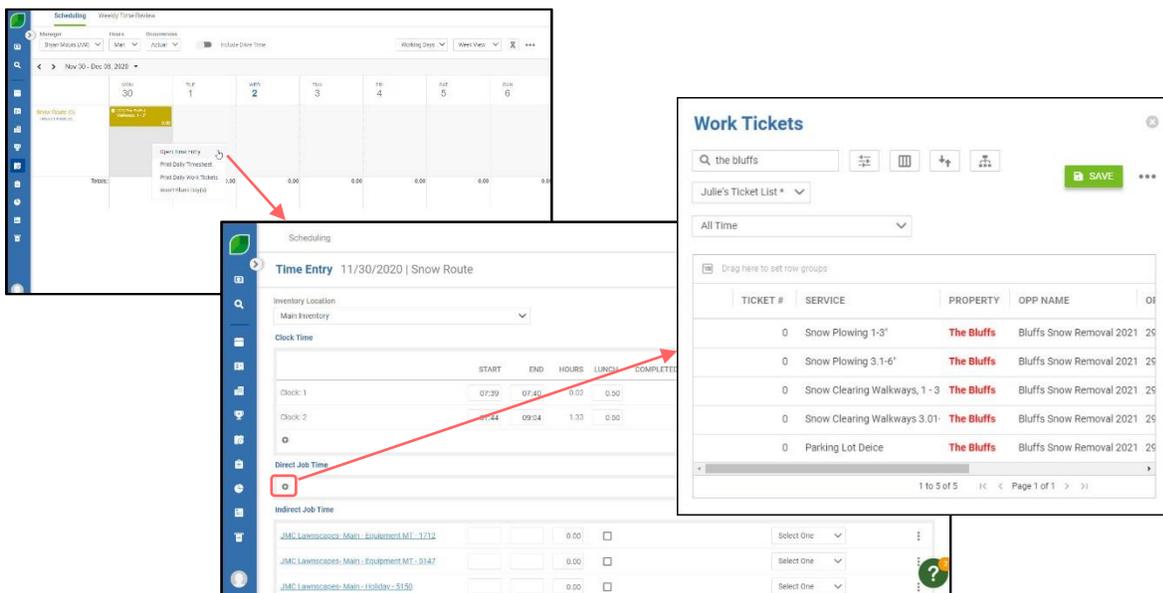
3. The service is available to the route as specified on the *Services* tab of the *Route* screen.

The crew leader initiates creation of the *As Needed* work ticket from the *Schedule* option on the home screen in mTime, then selects the property^a from the *Schedule* screen, and finally selects the service opportunity^b from the *Choose Service* screen as depicted below.



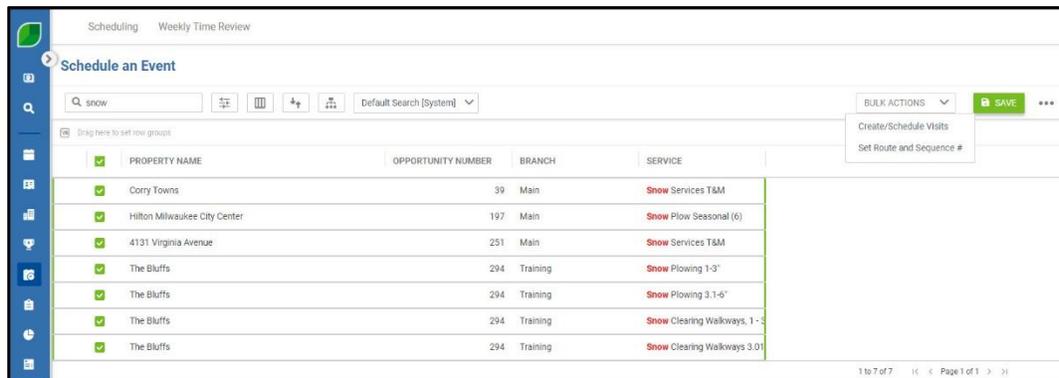
Add As Needed Ticket on Time Entry Screen

In situations where a crew member clocked time, but the crew leader did not assign time to the appropriate *As Needed* opportunity service, or for companies not using mobile time, office staff can choose an *As Needed* opportunity service to which time should be assigned from the *Time Entry* screen.



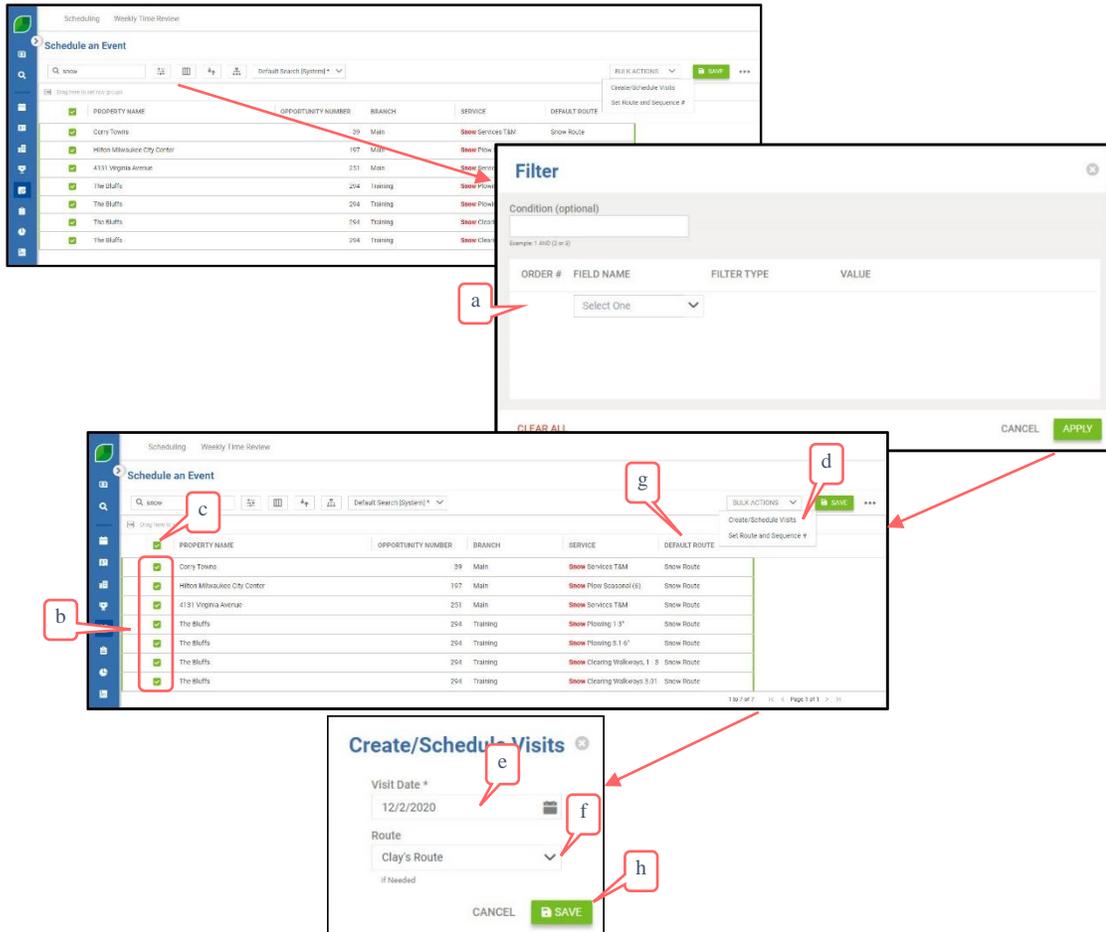
Add As Needed Tickets with the Schedule an Event Function

The *Schedule an Event* screen available from the *Actions* menu  on the *Schedule Board* screen provides a search list of opportunity services to support the mass-scheduling of customer visits for an *As Needed* service based on an event (for example, a snow-fall event).



Two primary actions can be performed from this screen:

1. **Advanced Preparation** – You can prepare in advance for mass-scheduling by establishing a route and sequence number for each relevant opportunity-service. For example, at the beginning of snow season, a scheduler can choose to set the default route for all shoveling opportunity services to the *Shoveler* route, and the default route for all snow plowing opportunity services to the *Snow Plowing* route. Furthermore, the scheduler can apply default sequence numbers to individual opportunity services. When an actual event is created based on the service opportunity, Aspire will use these defaults to create and schedule the [as needed work tickets](#).
2. **Scheduling** – Bulk creation and scheduling of [as needed work tickets](#) in response to an impending or recent event such as a snow fall for opportunity services identified and selected in the search list. To perform mass scheduling, first specify [search list](#) criteria^a to identify and list the opportunity services for which you want to schedule visits as depicted below. Then select the opportunity services for which you want to schedule visits by placing checkmarks^b in front of them. If the list is well defined, you can select all the opportunity services by clicking the checkmark^c in the header. Click on the *Bulk Actions* icon and select the *Create/Schedule Visits* option^d from the *Actions* menu to display the *Create/Schedule Visits* screen. Select the date^e on which the visits should be scheduled and the route^f that should be used if a default route^g is not provided for the service opportunity. When you click the Save icon^h, Aspire will create work tickets based on the selected *As Needed* services, and place the associated visits on the *Schedule Board*.



The screenshot shows the 'Schedule an Event' interface in the Aspire software. It includes a search bar, a table of property opportunities, a filter dialog, and a 'Create/Schedule Visits' modal. Red callouts labeled 'a' through 'h' point to specific UI elements:

- a**: Points to the 'Filter' dialog box.
- b**: Points to the left-hand navigation sidebar.
- c**: Points to the search bar.
- d**: Points to the 'BULK ACTIONS' dropdown menu.
- e**: Points to the 'Visit Date' field in the 'Create/Schedule Visits' modal.
- f**: Points to the calendar icon next to the visit date.
- g**: Points to the 'CLEAR ALL' button in the filter dialog.
- h**: Points to the 'SAVE' button in the 'Create/Schedule Visits' modal.

PROPERTY NAME	OPPORTUNITY NUMBER	BRANCH	SERVICE	DEFAULT ROUTE
Cory Towns	39	Main	Snow Services TAM	Snow Route
Hilton Milwaukee City Center	197	Main	Snow Plow Seasonal (E)	Snow Route
4131 Virginia Avenue	251	Main	Snow Services TAM	Snow Route
The Bluffs	254	Training	Snow Plowing 1 3"	Snow Route
The Bluffs	254	Training	Snow Plowing 3 1 6"	Snow Route
The Bluffs	254	Training	Snow Clearing Walkways, 1 - 3	Snow Route
The Bluffs	254	Training	Snow Clearing Walkways 3.01	Snow Route