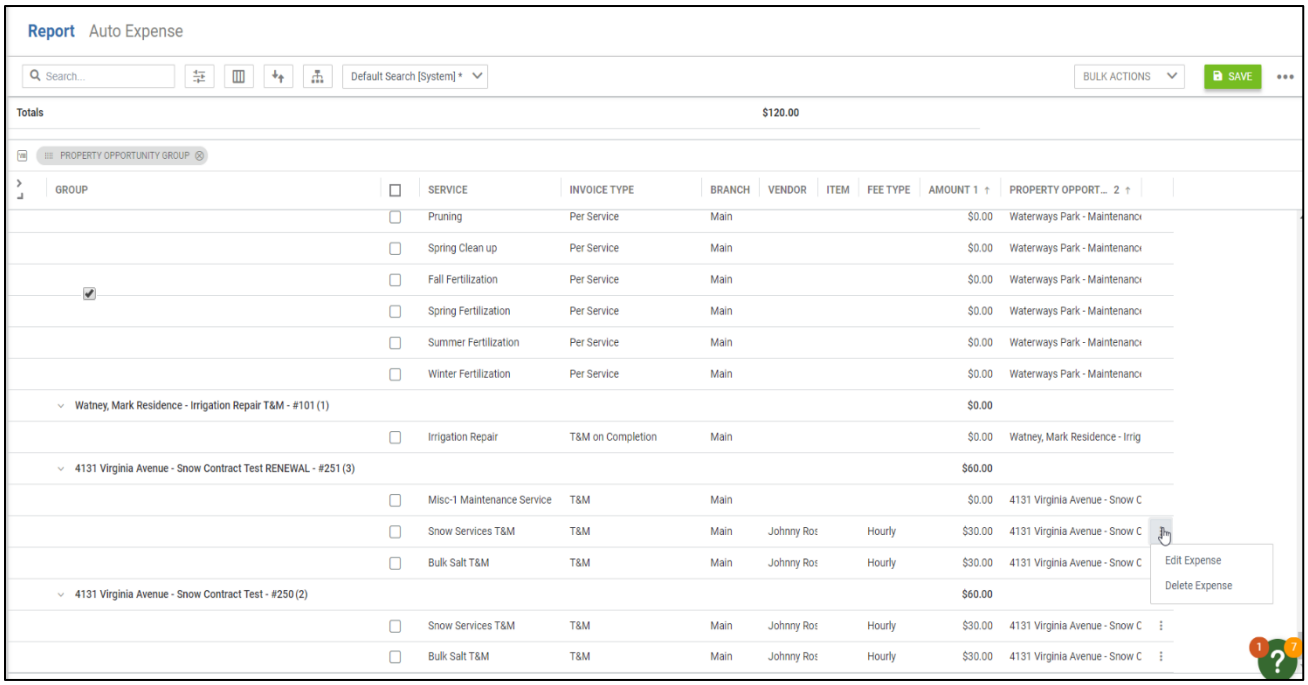
Auto Expense Report

Aspire provides a feature that allows work tickets for subcontracted services to automatically generate expense items when the associated work ticket is completed. This feature is described in the article, *Subcontractor Auto Expenses*. Aspire provides the *Auto Expenses Report* available from the *Reports* screen allowing users to summarize or edit existing auto-expenses or to mass-add new auto-expenses to existing opportunity services.

Report Usage

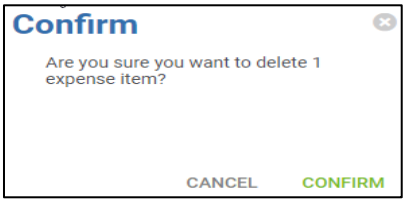
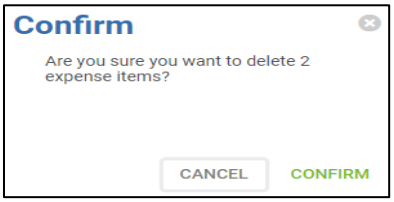
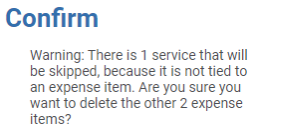
The following image shows the default system view for this search list…



Note that the system default view (*Default Search [System]*) groups opportunity services by opportunity.

The search list includes all opportunity services for contract opportunities for which the invoice type is per service or T&M, or the associated service is multi-visit. Any opportunity services that already have vendor auto-expense defined will show the vendor, item, fee type, amount and have a *More* ⋮ button and *Delete* available with options to *Edit Expense* and *Delete Expense* as depicted above. If an opportunity service has multiple auto-expenses defined, that opportunity service will have one line for each auto-expense.

The following table summarizes unique elements of the *Auto Expense Report* screen compared to other search lists.

Screen Element	Description
Selection Check Box	Allows the user to select multiple opportunity services to be affected when selecting options from the *Bulk Actions* menu.
Edit Expense option	Available in the *More* menu, *Edit Expense* option is only available for opportunity services that have already had one or more vendor auto-expenses defined. Selecting *Edit Expense* displays the *Subcontractor Expense* screen (see article, Subcontractor Auto Expenses). This screen will allow the user to edit the selected auto-expense, or to create other auto-expenses for the same opportunity service.
Delete Expense option	Available in the *More* menu, *Delete Expense* option is only available for opportunity services that have already had one or more vendor auto-expenses defined. Selecting *Delete Expense* displays the confirmation dialog shown to the right. If the user clicks the *Confirm* button, the selected auto-expense is deleted. It the user clicks the *Cancel* button, the deletion is canceled. 
Add Auto Expense option	Available in the *Bulk Actions* menu. This option affects all line items whose checkbox is checked. Selecting this option displays the *Subcontractor Expense* screen (see article, Subcontractor Auto Expenses). This screen will allow the user to add one or more auto-expenses simultaneously to the selected opportunity services.
Delete option	Available in the *Bulk Actions* menu. This option only affects line items whose checkbox is checked. Selecting this item displays the confirmation dialog shown to the right. If the user clicks the Confirm button, the selected auto-expense items are deleted. If the user clicks the *Cancel* button, the deletion is canceled.  If some of the selected opportunity services do not have auto expense defined, Aspire adds a warning notification to the confirmation dialog. 

Available Search List Fields

The following fields are available for display in this search list. (* indicates field included in system default view):

1. Account Owner Name
2. Amount*
3. As Needed
4. Billing Contact Name
5. Branch Name*
6. Delete Expense*
7. Division Name (from Opportunity Service)
8. Edit Expense*
9. Fee Type*
10. Green or White
11. Invoice Type*
12. Item Name*
13. Job Status Name
14. Occur

15. Operations Manager Name
16. Opportunity #
17. Opportunity End Date
18. Opportunity Name
19. Opportunity Start Date
20. Opportunity Status
21. Primary Contact Name
22. Property Name
23. Property Opportunity Group Name* (Combines property name, opportunity name, and opportunity number)
24. Service Name*
25. Sub Cost
26. Vendor Name*