

Aspire Reports – Top 60

This article shares the top 60 Aspire reports that provide guidance for management of your business in Aspire. It is comprised of two sections:

1. **Summary of Top 60** – Provides a concise list of the reports.
2. **Top 60 Report Definitions** – Provides information about how to create each report in Aspire. They are primarily created using Aspire search lists.

Summary of Top 60

Business Area	#	Report	Reports Sources	Where in Aspire	Role
CRM					
	1	Open Issues	List/Dash	Home Page Activity Folder	Executive
	2	MTD Client Touches by User	List/Dash	Home Page Activity Folder	Executive/Branch Manager
	3	MTD Client Complaints	List/Dash	Home Page Activity Folder	Executive
	4	MTD Client Compliments	List/Dash	Home Page Activity Folder	Executive
	5	Property Clean Up checklist	List	Property List	Branch Admin
	6	Contact Clean Up checklist	List	Contact List	Branch Admin
	7	MTD QA's	List/Dash	Property List	Executive
	8	Lead Source / Marketing Budget Evaluation	List	Opportunity List	Executive
Sales					
	9	New Property Leads MTD	List/Dash	Property List	Executive/Branch Manager
	10	New Contact Leads	List/Dash	Contact List	Executive/Branch Manager
	11	Active Prospects – Properties with Contacts	List/Dash	Property/Contact List	Branch Manager
	12	Sales Silo	List/Pivot	Opportunity List/Sales Pivot	Branch Manager
	13	New Opportunities MTD by AM	List/Dash	Opportunity List	Account & Branch Manager
	14	Sold Opportunities MTD by Division or WO/Contract	List/Dash	Opportunity List	Account & Branch Manager

Business Area	#	Report	Reports Sources	Where in Aspire	Role
	1 5	Referral Analysis MTD &YTD	List	Property List	Marketing Director
	1 6	YTD Contract Opportunity Analysis	List	Opportunity List	Branch/Branch Manager
	1 7	MTD Renewals Report	List/Dash	Renewals Drill Down	Account Manager
	1 8	Sold GM YTD	List/Pivot	Opportunity List	Executive
	1 9	Paid Monthly Sales Commission	List	Sales Commission Drill Down	Executive
	2 0	Unsold Optional Services	List	Opportunity Service Report	Account Manager
Purchasing					
	2 1	Unpurchased Materials +/- 30 Days	List	Purchasing Assistant	Purchaser/Ops Manager
	2 2	Job Purchase Analysis	List	Purchasing Assistant	Purchaser/Ops Manager
	2 3	New Purchase Receipts – Through Today	List	Purchasing Receipts List	Purchaser/Branch Admin
	2 4	Received Purchase Receipts – Through Today	List	Purchasing Receipts List	Purchaser/Branch Admin
	2 5	Approved Purchase Receipts – Last Month	List	Purchasing Receipts List	Purchaser/Branch Admin
	2 6	Not Sent to accounting Error List	List	Purchasing Receipts List	Purchaser/Branch Admin
	2 7	MTD Material Allocation	Pivot	Purchase Pivot	Ops Manager
Invoicing					
	2 8	Fixed Payment Billing	List/Dash	Invoicing assistant	Branch Admin
	2 9	Open Billing	List	Invoicing assistant	Branch Admin
	3 0	Fixed Price on Payment schedule	List	Invoicing assistant	Branch Admin
	3 1	Per Service/Fixed on Completion and T&M	List	Invoicing assistant	Branch Admin
	3 2	Pending Batches	List/Alarm	Batch List	Branch Admin

Business Area	#	Report	Reports Sources	Where in Aspire	Role
	3 3	Open/Unpaid Invoices	List/Dash	Invoice List	Executive/Branch Admin
	3 4	Aging	List/Dash	Receivables List	Executive/Branch Admin
	3 5	Payments to Deposit	List	Payments List	Branch Admin
	3 6	Deposits Pending	List	Deposit List	Branch Admin
	3 7	Deposited funds w/remaining balance	List	Payments List	Branch Admin
	3 8	Open Billing/Fixed Payment Schedule WIP WO Ticket Review	List	Opportunity List	Account Manager
	3 9	Open Billing/Fixed Payment Schedule WO Review	List	Opportunity List	Account Manager
Production					
	4 0	<i>Open Maintenance Tickets – Through Today</i>	List	Work Ticket List	Ops Manager
	4 1	<i>Open WO Tickets – Through Today</i>	List	Work Ticket List	Ops Manager
	4 2	Scheduled Maintenance Tickets – Through Last Week	List	Work Ticket List	Ops Manager
	4 3	Scheduled WO Tickets – Through Last Week	List	Work Ticket List	Ops Manager
	4 4	Pending Approval by AM/Sales Person	List	Work Ticket List	Account Manager
	4 5	EOM Internal Tickets	List	Work Ticket List	Ops Manager
	4 6	Completed Ticket Analysis MTD – Maint	List/Pivot	Work Ticket List	Account Manager
	4 7	Completed Ticket Analysis MTD – WO by division	List/Pivot	Work Ticket List	Account Manager
	4 8	WO Backlog	List	Work Ticket List	Ops Manager
	4 9	YTD Revenue Per Hour & Realized Rate by division	Pivot	Work Ticket List	Executive/Account Manger
	5 0	YTD Hours Efficiency by Route – Maint	Pivot	Work Ticket List	Ops Manager

Business Area	#	Report	Reports Sources	Where in Aspire	Role
	5 1	Divisional Analysis	Pivot	Work Ticket List	Executive
	5 2	Maintenance Forecast	Pivot	Work Ticket Pivot	Ops Manager
	5 3	Branch Monthly GM	Pivot	Work Ticket Pivot	Executive
	5 4	Prior to Current Year GM Est & Act	Pivot	Work Ticket Pivot	Executive
	5 5	Enhancement/Landscaping Backlog	Pivot	Work Ticket Pivot	Ops Manager
	5 6	Sold Mowing Service w/SF	List	Opportunity Service Report	Ops Manager
	5 7	Snow Per Service w/SF	List	Opportunity Service Report	Ops Manager
	5 8	EOM Revenue	List	EOM Standard Report – Revenue Drill Down List	Executive
	5 9	Revenue O/U Contract	List	EOM Standard Report – Over Under Drill Down List	Executive
	6 0	Revenue O/U WO	List	EOM Standard Report – Over Under Drill Down List	Accountant/Executive
	6 1	EOM Expenses by Service	List	EOM Standard Report – Expense Tab – Expenses Drill Down List	Accountant/Executive
	6 2	EOM Expenses by Division	List	EOM Standard Report – Expense Tab – Expenses Drill Down List	Executive
	6 3	Inventory Adjustments by Item	List	EOM Report – Expense Tab – Inventory QTY Drill Down List	Accountant/Executive
	6 4	Weekly Payroll	Pivot	Hours Pivot	Accountant

Top 60 Report Definitions

Report # 1 Open Issues

Report Name	Open Issues
Location in Aspire	Home Page Activities Folder
Filter Fields	Activity Type – In – Issue, Status – In – Open
List Display Fields	Due Date, Created by User, Regarding, Priority, Subject, Activity Category
Sort Fields	Priority (Optional)
Group Fields	Can group by Created by User

Report # 2 MTD Client Touches by User

Report Name	MTD Client Touches by User
Location in Aspire	Home Page Activities Folder
Filter Fields	Activity Type – Not In – Issue, Start date – This Month
List Display Fields	Due Date, Created by User, Regarding, Priority, Subject, Activity Category, Note
Sort Fields	None
Group Fields	Created by User

Report # 3 MTD Client Complaints

Report Name	MTD Client Complaints
Location in Aspire	Home Page Activities Folder
Filter Fields	Activity Type – In – Issue and To Do, Activity Category – In – Complaint, Start Date – This Month
List Display Fields	Due Date, Created by User, Regarding, Priority, Subject, Activity Category, Note
Sort Fields	None
Group Fields	Created by User

Report # 4 MTD Client Compliments

Report Name	MTD Client Compliments
Location in Aspire	Home Page Activities Folder
Filter Fields	Activity Type – In – Issue and To Do, Activity Category - In – Compliment, Start Date – This Month
List Display Fields	Due Date, Created by User, Regarding, Priority, Subject, Activity Category, Note
Sort Fields	None
Group Fields	Created by User

Report #5 Property Clean Up Check List

Report Name	Property Clean Up Check List
Location in Aspire	Property List Page
Filter Fields	Active – Equals - Yes
List Display Fields	Property Name, Property name Abr, Property Address Line 1, Property City, Property State, Property Zip, Billing Contact Full Name, Primary Contact Name, Account Owner
Sort Fields	Property Name (Optional)
Group Fields	None

Report # 6 Contact Cleanup Check List

Report Name	Contact Cleanup Check List
Location in Aspire	Contact List Page
Filter Fields	Active – Equals – Yes
List Display Fields	Last Name, First Name, Company Name, Mobile Phone, Email, Primary Phone, Primary Address Line 1, Primary City, Primary State, Primary Zip, Contact Type
Sort Fields	Last Name (Optional)
Group Fields	None

Report #7 MTD QA's

Report Name	MTD QA's
Location in Aspire	Property List Page
Filter Fields	Active – Equals – Yes, Status – In – Customer, (Could also us a property Tag for QA required), QA Date – This Month
List Display Fields	Property Name, Account Owner, QA Date, QA Score
Sort Fields	Property Name (Optional)
Group Fields	Account Owner

Report #8 Lead Source Marketing Eval list

Report Name	Lead Source Marketing Eval list
Location in Aspire	Property List Page
Filter Fields	Active – Equals – Yes, Status – Not In – Past Customer, Created Date – This Year
List Display Fields	Property Name, Company Name, Account Owner, Lead Source
Sort Fields	Property Name (Optional)
Group Fields	Lead Source

Report #9 New Property Leads MTD

Report Name	New Property Leads MTD
Location in Aspire	Property List Page
Filter Fields	Active – Equals – Yes, Created Date – This Month
List Display Fields	Property Name, Property Address, Property City, Property State, Property Zip, Primary Contact, Account Owner, Property Status
Sort Fields	Property Name (Optional)
Group Fields	Account Owner

Report #10 New Contact Leads

Report Name	New Contact Leads
Location in Aspire	Contact List Page
Filter Fields	Active – Equals – Yes, Created date – This Month, Contact Type – In - Customer and Prospect
List Display Fields	Last Name, First Name, Company Name, Mobile Phone, Email, Primary Phone, Primary Address Line 1, Primary City, Primary State, Primary Zip, Owner, Created by User
Sort Fields	Contact Last Name (Optional)
Group Fields	None

Report # 11 Active Prospects – Properties with Contacts

Report Name	Active Prospects – Properties with Contacts
Location in Aspire	Property List Page
Filter Fields	Active – Equals – Yes
List Display Fields	Property Name, Primary Contact Name, Primary Contact Mobile Phone, New Email, New Issue, New ToDo, New Appointment
Sort Fields	Property Name
Group Fields	Account Owner

Report #12A Sales Silo

Report Name	Sales Silo
Location in Aspire	Opportunity Page List
Filter Fields	Created Date – This Year, Division – In – (multiple lists should be created by division)
List Display Fields	Property Name, Opportunity Name, Opportunity Number, Estimated \$, Estimated Labor Hours, Estimated Cost \$, Estimated Gross Margin %, Estimated Profit %
Sort Fields	None
Group Fields	Sales Rep, Status Name

Report# 12B Sales Silo

Report Name	Sales Silo
Location in Aspire	Sales Pivot
Filter Fields	Created Date Year – 2016 (current year)
Data Display Fields	Estimated Price, Estimated Cost, Estimated Gross Margin %
Row Display Fields	Account Owner, Opportunity Status, Property, Division
Column Display Fields	Created Date Month

Report # 13 New Opportunities MTD by AM

Report Name	New Opportunities MTD by AM
Location in Aspire	Opportunity Page List
Filter Fields	Created Date – This Month
List Display Fields	Property Name, Opportunity Name, Opportunity Number, Opportunity Status
Sort Fields	None
Group Fields	Account Owner, Division

Report #14 Sold Opportunities MTD by Type and/or Division

Report Name	Sold Opportunities MTD by Type and/or Division
Location in Aspire	Opportunity List Page
Filter Fields	Won Date – This Month, Opportunity Type – In - (This could be a list for each type, contract and WO), Division – In – (once again this could be a single division or may be all division in which case grouping would be used)
List Display Fields	Property Name, Opportunity Name, Opportunity Number, Estimated \$, Estimated Cost \$, Estimated Gross Margin %
Sort Fields	Property Name (Optional)
Group Fields	Sales Rep

Report # 15 Referral Analysis MTD/YTD

Report Name	Referral Analysis MTD/YTD
Location in Aspire	Property List Page
Filter Fields	Active – Equals – Yes, Referral Source Name – In – Referral (this may be multiple fields like employee referral, builder referral etc)
List Display Fields	Property Name, Company Name, Primary Contact, Account Owner
Sort Fields	Property Name (Optional)
Group Fields	Referral Source Name (Optional)

Report # 16 YTD Contract Opportunity Analysis

Report Name	YTD Contract Opportunity Analysis
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Location in Aspire	Opportunity List Page
Filter Fields	End Date – This Year, Opportunity Type – In – Contract, Job Status – In – Complete and In Production
List Display Fields	Property Name, Opportunity Name, Opportunity Number, Estimated \$, Earned Revenue, Estimated Labor Hours, Act Labor Hours, Estimated Cost \$, Act Cost, Estimated Gross Margin %, Act Gross Margin % (could use formula fields showing Revenue variances and cost variances)
Sort Fields	Property Name (Optional)
Group Fields	None

Report # 17 MTD Renewals Report

Report Name	MTD Renewals Report
Location in Aspire	Renewal Drill Down
Filter Fields	Contract Renewal Date – This Month, OR Contract End Date – This Month
List Display Fields	Property, Contract Amount, Gross Margin, Days Remaining, Renewal Status, Proposed Amount, Renewed Amount, Change in Price, Job Report
Sort Fields	Property Name (Optional)
Group Fields	Account Owner

Report # 18A Sold GM YTD

Report Name	Sold GM YTD
Location in Aspire	Opportunity Page List
Filter Fields	Won Date – This Year,
List Display Fields	Property Name, Opportunity Name, Estimated \$, Estimated Cost \$, Estimated Gross Margin %
Sort Fields	None
Group Fields	Division or Opportunity Type

Report # 18B Sold GM YTD

Report Name	Sold GM YTD
Location in Aspire	Sales Pivot
Filter Fields	Won Date Year – 2016 (Current Year)
Data Display Fields	Estimated Price, Estimated Cost, Estimated Gross Margin %, Estimated GP
Row Display Fields	Division, Property, Opportunity Type
Column Display Fields	Won Date Month (Select all months)

Report # 19 Paid Invoice Sales Commission Report

Report Name	Paid Invoice Sales Commission Report
Location in Aspire	Commission Drill Down
Filter Fields	Unpaid Amount – Equals – 0, Date Paid – This Month
List Display Fields	Property, Opportunity Name, Opportunity Number, Division, Invoice Number, Invoice Date, Invoice Amount, Gross Margin
Sort Fields	None
Group Fields	Sales Rep

Report # 20 Unsold Optional Services

Report Name	Unsold Optional Services
Location in Aspire	Opportunity Service
Filter Fields	Invoice Type – In – Optional, Start Date – This Year
List Display Fields	Property Name, Opportunity Name, Service Name, Price, Division Name
Sort Fields	None
Group Fields	Service Name

Report # 21 Unpurchased Materials

Report Name	Unpurchased Materials
Location in Aspire	Purchasing Assistant
Filter Fields	Quantity to Order – Greater Than – 0, Status – In Complete
List Display Fields	Property Name, Scheduled Start Date, Service Name, Item Name, Estimated Item Quantity, Quantity to Order
Sort Fields	Start Date (Optional)
Group Fields	Item Name

Report # 22 Job Purchase Analysis

Report Name	Job Purchase Analysis
Location in Aspire	Purchasing Assistant
Filter Fields	Start Date – This Year, Status – In – Complete
List Display Fields	Property Name, Opportunity Name, Opportunity Number, Service Name, Item Name, Estimated Item Quantity, Item Quantity Allocated
Sort Fields	None
Group Fields	Opportunity Number

Report # 23 New Purchase Receipts – Through Today

Report Name	New Purchase Receipts – Through Today
Location in Aspire	Purchasing Receipts List
Filter Fields	Receipt Status Code – Equals – New, Created Date – Through Today

List Display Fields	Receipt #, Vendor, Work Ticket #, Receipt Total Cost, Created Date, Service Name, Purchase Type
Sort Fields	None
Group Fields	Vendor

Report # 24 Received Purchase Receipts – Through Today

Report Name	Received Purchase Receipts – Through Today
Location in Aspire	Purchasing Receipts List
Filter Fields	Receipt Status Code – Equals – Received, Received Date – Through Today
List Display Fields	Receipt #, Vendor, Work Ticket #, Receipt Total Cost, Received Date, Service Name, Created Date, Purchase Type
Sort Fields	None
Group Fields	Vendor (Optional)

Report #25 Approved Purchase Receipts – Last Month

Report Name	Approved Purchase Receipts – Last Month
Location in Aspire	Purchasing Receipts List
Filter Fields	Receipt Status Code – In – Approved, Vendor Invoice Date – Last Month
List Display Fields	Receipt #, Vendor, Work Ticket #, Receipt Total Cost, Received Date, Service Name, Created Date, Purchase Type
Sort Fields	None
Group Fields	Vendor (Optional)

Report # 26 Not Sent to Accounting Error List

Report Name	Not Sent to Accounting Error List
Location in Aspire	Purchasing Receipts List
Filter Fields	Sync Error – Contains - Error
List Display Fields	Receipt #, Vendor Name, Receipt Total Cost, Sync Error
Sort Fields	None
Group Fields	None

Report # 27 MTD Material Allocation

Report Name	MTD Material Allocation
Location In Aspire	Purchasing Pivot
Filter Fields	Allocation Date Year – (Current Year), Received Date Month – All Months
Data Display Fields	Allocation Qty, Allocation Total
Row Display Fields	Allocation Type, Division, Property

Column Display Fields	Allocation Date Month – (current month)
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Report # 28 Fixed Payment Billing

Report Name	Fixed Payment Billing
Location in Aspire	Invoicing Assistant
Filter Fields	Invoice Type – In Fixed Payment Billing
List Display Fields	Property Name, Company Name, Opportunity Name, Invoice Amount, Sales Rep
Sort Fields	None
Group Fields	None

Report # 29 Open Billing

Report Name	Open Billing
Location in Aspire	Invoicing Assistant
Filter Fields	Invoice Type – In – Open Billing
List Display Fields	Property Name, Company Name, Opportunity Name, Invoice Amount, Sales Rep
Sort Fields	None
Group Fields	None

Report # 30 Fixed Price on Payment Schedule

Report Name	Fixed Price on Payment Schedule
Location in Aspire	Invoicing Assistant
Filter Fields	Invoice Type – In – Fixed Price on Payment Schedule
List Display Fields	Property Name, Company Name, Opportunity Name, Invoice Amount, Sales Rep, Last Job Completed Date
Sort Fields	None
Group Fields	None

Report # 31 Per Service, Fixed Price on Completion & T&M

Report Name	Per Service, Fixed Price on Completion & T&M
Location in Aspire	Invoicing Assistant
Filter Fields	Invoice Type – In – Per Service, and Fixed Price on Completion and T&M
List Display Fields	Property Name, Company Name, Opportunity Name, Invoice Amount, Invoice Type, Sales Rep, Last Job Completed Date
Sort Fields	None
Group Fields	None

Report # 32 Pending Batches

Report Name	Pending Batches
Location in Aspire	Batch List
Filter Fields	Date Completed – Custom is Null
List Display Fields	Invoice Batch Number, Created Date, Created By, Invoice Count, Batch Amount
Sort Fields	None
Group Fields	None

Report # 33 Open/Unpaid Invoices

Report Name	Open/Unpaid Invoices
Location in Aspire	Invoice List
Filter Fields	Unpaid Balance – Greater Than 0
List Display Fields	Account Manager, Property Name, Company Name, Invoice Number, Invoice Date, Original Amount, Unpaid Balance, Batch Status, Email Status
Sort Fields	Invoice Date
Group Fields	Property Name

Report # 34 Aging

Report Name	Aging
Location in Aspire	Receivables List/Aging Reports
Filter Fields	Balance – Greater Than - 0
List Display Fields	Property Name, Billing Contact Full Name, Current, Aging 1 - 30, Aging 31 - 60, Aging 61 - 90, Aging 91+, New Email, Add Payment
Sort Fields	None
Group Fields	Company Name

Report # 35 Payments to Deposit

Report Name	Payments to Deposit
Location in Aspire	Payments List
Filter Fields	Deposited – Equals – No, Payment Type – Not In – Credit Memo
List Display Fields	Company Name, Payment Date, Contact Full Name, Payment Type, Payment Reference, Payment Amount
Sort Fields	None
Group Fields	None

Report # 36 Deposits Pending

Report Name	Deposits Pending
Location in Aspire	Deposit List
Filter Fields	Deposit Status – Equals - New
List Display Fields	Deposit Amount, Date Created, Created by Full Name, Payment Count
Sort Fields	None
Group Fields	None

Report # 37 Deposited Funds with Remaining Balance

Report Name	Deposited Funds with Remaining Balance
Location in Aspire	Payments List
Filter Fields	Payment Remaining Amount – Greater than - 0
List Display Fields	Company Name, Payment Date, Contact Full Name, Payment Type, Payment Reference, Payment Amount, Payment Remaining Amount
Sort Fields	None
Group Fields	None

Report # 38 Open Billing/Fixed Payment Schedule WIP WO Ticket Review

Report Name	Open Billing/Fixed Payment Schedule WIP WO Ticket Review
Location in Aspire	Work Ticket List
Filter Fields	Invoice Type – In – Open Billing & Fixed Price on Payment Schedule, Scheduled Start Date – Through Last week, Work Ticket Status Code – In – Scheduled & Pending Approval & Open, (Division can also be used as a filter)
List Display Fields	Property Name, Service Text, Opportunity Number, Opportunity Name, Scheduled Start Date, Revenue, Earned Revenue, Percent Complete, Total Cost (Estimated), Total Cost (Actual), Est Hrs, Act Hrs
Sort Fields	None
Group Fields	Opportunity Number

Report # 39 Open Billing/Fixed Payment Schedule WO Review

Report Name	Open Billing/Fixed Payment Schedule WO Review
Location in Aspire	Opportunity Page List
Filter Fields	Invoice Type – In – Open Billing & Fixed Price on Payment Schedule, Job Status – In – In Process
List Display Fields	Property Name, Opportunity Number, Opportunity Name, Start Date, Estimated \$, Earned Revenue, Percent Complete, Estimated Cost \$, Act Cost
Sort Fields	None
Group Fields	Account Owner

Report # 40 Open Maintenance Tickets – Through Today

Report Name	Open Maintenance Tickets – Through Today
Location in Aspire	Work Ticket List
Filter Fields	Work Ticket Status Code – In – Open, Division – In – Maintenance, Scheduled Start Date – Through Today, Anticipated Start date – This Year
List Display Fields	Property Name, Opportunity Number, Opportunity Name, Service Text, Start Date, Revenue, Earned Revenue, Est Hrs, Act Hrs
Sort Fields	None
Group Fields	None

Report # 41 Open WO Tickets – Through Today

Report Name	Open WO Tickets – Through Today
Location in Aspire	Work Ticket List
Filter Fields	Work Ticket Status Code – In – Open, Opportunity Type – In – Work Order, Anticipated Start date – This year, Scheduled Start Date – Through Today
List Display Fields	Property Name, Opportunity Number, Opportunity Name, Service Text, Start Date, Revenue, Earned Revenue, Est Hrs, Act Hrs
Sort Fields	None
Group Fields	None

Report # 42 Scheduled Maintenance Tickets – Through Last Week

Report Name	Scheduled Maintenance Tickets – Through Last Week
Location in Aspire	Work Ticket List
Filter Fields	Work Ticket Status Code – In – Scheduled, Division – In – Maintenance, Anticipated Start date – This year, Scheduled Start Date – Through Last Week
List Display Fields	Property Name, Opportunity Number, Opportunity Name, Start Date, Estimated \$, Earned Revenue, Percent Complete, Estimated Cost \$, Act Cos
Sort Fields	None
Group Fields	None

Report # 43 Scheduled WO Tickets – Through Last Week

Report Name	Scheduled WO Tickets – Through Last Week
Location in Aspire	Work Ticket List
Filter Fields	Work Ticket Status Code – In – Scheduled, Opportunity Type – In – Work Order, Anticipated Start date – This year, Scheduled Start Date – Through Last Week

List Display Fields	Property Name, Opportunity Number, Opportunity Name, Service Text, Start Date, Revenue, Earned Revenue, Est Hrs, Act Hrs, Total Cost (Estimated), Total Cost (Actual) (Could also display all cost types separately)
Sort Fields	None
Group Fields	None

Report # 44 Pending Approval by AM/Sales Person

Report Name	Pending Approval by AM/Sales Person
Location in Aspire	Work Ticket List
Filter Fields	Work Ticket Status Code – In – Pending Approval
List Display Fields	Property Name, Opportunity Number, Opportunity Name, Service Text, Start Date, Revenue, Earned Revenue, Est Hrs, Act Hrs, Material Cost Estimated, Material Cost Actual, Subcontract Cost Estimated, Subcontract Cost Actual
Sort Fields	None
Group Fields	Account Owner Name or Sales Rep Name

Report # 45 EOM Internal Tickets

Report Name	EOM Internal Tickets
Location in Aspire	Work Ticket List
Filter Fields	Work Ticket Status Code – In – Open, Division – In – Overhead, Scheduled Start Date – Through Last Month
List Display Fields	Property Name, Service Text, Occurrence, Status, Act Hrs
Sort Fields	None
Group Fields	None

Report # 46A Completed Ticket Analysis MTD – Maint

Report Name	Completed Ticket Analysis MTD – Maint
Location in Aspire	Work Ticket List
Filter Fields	Work Ticket Status Code – In – Completed, Division – In - Maintenance, Completed Date – This Month
List Display Fields	Property Name, Opportunity Number, Opportunity Name, Service Text, Start Date, Revenue, Earned Revenue, Est Hrs, Act Hrs, Material Cost Estimated, Material Cost Actual, Subcontract Cost Estimated, Subcontract Cost Actual, Gross Margin
Sort Fields	None
Group Fields	Account Owner Name, Property Name

Report # 46B Completed Ticket Analysis MTD – Maint

Report Name	Completed Ticket Analysis MTD - Maint
Location In Aspire	Work Ticket Pivot
Filter Fields	Completed Date Year – Current Year, Completed Date Month – (Choose), Division - Maintenance
Data Display Fields	Hours Est, Hours Act, Hours Budget Variance, Material Cost Est, Material Cost Act, Sub Cost Est, Sub Cost Act, Other cost Est, Other Cost Act, Revenue Earned, GM (Estimated), Gross Margin
Row Display Fields	Account Owner, Property, Service Name
Column Display Fields	None

Report # 47A Completed Ticket Analysis MTD – WO by division

Report Name	Completed Ticket Analysis MTD – WO by division
Location in Aspire	Work Ticket List
Filter Fields	Work Ticket Status Code – In – Completed, Opportunity Type – In – Work Order, Completed Date – This Month
List Display Fields	Property Name, Opportunity Number, Opportunity Name, Service Text, Start Date, Revenue, Earned Revenue, Est Hrs, Act Hrs, Material Cost Estimated, Material Cost Actual, Subcontract Cost Estimated, Subcontract Cost Actual, Gross Margin
Sort Fields	None
Group Fields	Account Owner Name, Property Name

Report # 47B Completed Ticket Analysis MTD – WO by division

Report Name	Completed Ticket Analysis MTD – WO by division
Location in Aspire	Work Ticket Pivot
Filter Fields	Completed Date Year – Current Year, Completed Date Month – (Choose), Opportunity Type – Work Order
Data Display Fields	Hours Est, Hours Act, Hours Budget Variance, Material Cost Est, Material Cost Act, Sub Cost Est, Sub Cost Act, Other cost Est, Other Cost Act, Revenue Earned, GM (Estimated), Gross Margin
Row Display Fields	Division, Account Owner, Property, Service Name
Column Display Fields	None

Report # 48 WO Backlog

Report Name	WO Backlog
Location in Aspire	Work Ticket List

Filter Fields	Opportunity Type – In – Work Order, Work Ticket Status Code – In – Open, Anticipated Start Date – Last 30 Days, OR Anticipated Start Date – Next 60 Days
List Display Fields	Property, Opportunity Number, Opportunity Name, Service Text, Est Hrs, Materials Est, Sub Cost Est, Revenue
Sort Fields	None
Group Fields	Account Manager

Report # 49 YTD Revenue Per Hour & Realized Rate by division

Report Name	YTD Revenue Per Hour & Realized Rate by division
Location In Aspire	Work Ticket Pivot
Filter Fields	Completed Date Year – Current Year, Work Ticket Status Name - Complete
Data Display Fields	Hours Est, Hours Act, Hours Budget Variance, Earned Revenue, Earned Revenue/Hour, Realized Rate (Estimated), Realized Rate (Actual)
Row Display Fields	Division
Column Display Fields	None

Report # 50 YTD Hours Efficiency by Route – Maint

Report Name	YTD Hours Efficiency by Route – Maint
Location In Aspire	Work Ticket Pivot
Filter Fields	Completed Date Year – Current Year, Division - Maintenance
Data Display Fields	Hours Est, Hours Act, Hours Budget Variance
Row Display Fields	Route, Property, Service Name
Column Display Fields	Completed Date Month

Report # 51 Divisional Analysis

Report Name	Divisional Analysis
Location In Aspire	Work Ticket Pivot
Filter Fields	Completed Date Year – Current Year
Data Display Fields	Hours Est, Hours Act, Hours Budget Variance, Material Cost Est, Material Cost Act, Sub Cost Est, Sub Cost Act, Other Cost Est, Other Cost Act, Gross Margin (Estimated), Gross Margin
Row Display Fields	Division, Service Type, Service Name
Column Display Fields	Completed Date Month

Report # 52 Maintenance Forecast

Report Name	Maintenance Forecast
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Location In Aspire	Work Ticket Pivot
Filter Fields	Anticipated Date – Current Year, Work Ticket Status – Open & Scheduled
Data Display Fields	Hours Scheduled, Hours Actual, Hours Actual Variance
Row Display Fields	Division, Property
Column Display Fields	Scheduled Date Month

Report # 53 Branch Monthly GM

Report Name	Branch Monthly GM
Location In Aspire	Work Ticket Pivot
Filter Fields	Completed Date Year – Current Year
Data Display Fields	Gross Margin (Estimated), Gross Margin
Row Display Fields	Branch
Column Display Fields	Completed Date Month

Report # 54 Prior to Current Year GM Est & Act

Report Name	Prior to Current Year GM Est & Act
Location In Aspire	Work Ticket Pivot
Filter Fields	None
Data Display Fields	Gross Margin (Estimated), Gross Margin
Row Display Fields	Branch (if applicable), Division, Service Type, Service Name
Column Display Fields	Completed Date Month, Completed Date Year (Filter to last year and this year)

Report # 55 Enhancement/Landscaping Backlog

Report Name	Enhancement/Landscaping Backlog
Location In Aspire	Work Ticket Pivot
Filter Fields	Work Ticket Status Name – Open & Scheduled, Scheduled Date Year – Current Year, Opportunity Type – Work Order
Data Display Fields	Hours Est, Labor Cost Est, Material Cost Est, Sub Cost Est, Revenue
Row Display Fields	Division, Property, Opportunity Name, Service Name
Column Display Fields	Scheduled Date Month

Report # 56 Sold Mowing Service w/SF

Report Name	Sold Mowing Service w/SF
Location in Aspire	Opportunity Service Report
Filter Fields	Service Lookup – In – (Your Mowing or weekly maintenance service name), Job Status – In – In Production
List Display Fields	Property Name, Opportunity Name, Service Lookup, Price, Turf SF (or your takeoff name)
Sort Fields	None
Group Fields	None

Report # 57 Snow Per Service w/SF

Report Name	Snow Per Service w/SF
Location in Aspire	Opportunity Service Report
Filter Fields	Invoice Type – In – Per Service & T&M, Job Status – In – In Production
List Display Fields	Property Name, Opportunity Name, Service Lookup, Price, Lot SF, Take off Name, Walks SF (Add additional SF columns as needed)
Sort Fields	None
Group Fields	Service Lookup

Report # 58 EOM Revenue

Report Name	EOM Revenue
Location in Aspire	EOM Standard Report – Revenue Drill Down List
Filter Fields	None
List Display Fields	Property Name, Opportunity Name, Opportunity Number, Work Ticket Number, Service Name, Earned Revenue this Period
Sort Fields	None
Group Fields	Division

Report # 59 Revenue O/U Contract

Report Name	Revenue O/U Contract
Location in Aspire	EOM Standard Report - Over Under Drill Down List
Filter Fields	Opportunity Type – Contains – Contract, Over/Under – Greater Than - 0
List Display Fields	Opportunity Number, Opportunity Name, Property Name, Division Name, Invoice Type, Invoice Amount, Earned Amount, Over/Under
Sort Fields	None
Group Fields	Opportunity Number (optional)

Report # 60 Revenue O/U WO

Report Name	Revenue O/U WO
Location in Aspire	EOM Standard Report – Over Under Drill Down List

Filter Fields	Opportunity Type – Contains – Work, Over/Under – Greater Than – 0
List Display Fields	Opportunity Number, Opportunity Name, Property Name, Division Name, Invoice Type, Invoice Amount, Earned Amount, Over/Under
Sort Fields	None
Group Fields	None

Report # 61 EOM Expenses by Service

Report Name	EOM Expenses by Service
Location in Aspire	EOM Standard Report – Expense Tab – Expenses Drill Down List
Filter Fields	None
List Display Fields	Opportunity Number, Opportunity Name, Property Name, Work Ticket Number, Service Lookup, Material, Sub, Equipment, Other
Sort Fields	None
Group Fields	Service Lookup

Report # 62 EOM Expenses by Division

Report Name	EOM Expenses by Division
Location in Aspire	EOM Standard Report – Expense Tab – Expenses Drill Down List
Filter Fields	End of Month Standard Report – Expense Tab – Expenses Drill Down List
List Display Fields	Opportunity Number, Opportunity Name, Property Name, Work Ticket Number, Service Lookup, Material, Sub, Equipment, Other
Sort Fields	None
Group Fields	Division

Report # 63 Inventory Adjustments by Item

Report Name	Inventory Adjustments by Item
Location in Aspire	EOM Standard Report – Expense Tab – Inventory QTY Drill Down List
Filter Fields	None
List Display Fields	Item Name, Quantity, Unit Cost, Total Cost, Allocated Date
Sort Fields	None
Group Fields	None

Report # 64 Weekly Payroll

Report Name	Weekly Payroll
Location in Aspire	Hours Pivot
Filter Fields	Work Date Year – Current Year, Work Date Month – Current Month (also next month is applicable), Work Date Weeks – (select for current pay period)
Data Display Fields	Hours Base Cost
Row Display Fields	Division, Employee, Status

Column Display Fields	None
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