

## Aspire Search List – Where to find them

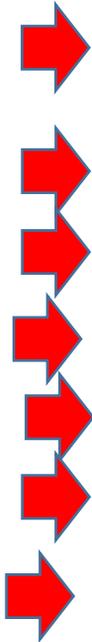
Within Aspire, search lists provide a mechanism for displaying data about various types of information. Often search lists are used to locate specific information at a given point in time, and sometimes they are used to create reports for reference. For additional information on creating and using search lists, see the article, [Creating Search Lists in Aspire](#).

This article enumerates all the search lists available within Aspire, describes the items represented in the search list and provides instruction on where each list can be found.

### List Navigation Instruction

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Attachment Type	Attachment types established from Aspire Admin	Administration screen → Manage Lists  icon under Application → Select Attachment Type option	Attachment Type
Audit Time Entry	Audit records recording creation or modification of a work ticket time allocations	Scheduling  icon in the Aspire Navigation Bar → Weekly Time Review → Select a time entry → Select Time Entry Audit option	Audit Time
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 report allows users to summarize or edit existing auto-expenses or to add new auto-expenses to existing opportunity services.	Reports  icon in the Aspire Navigation Bar → Standard Report tab → Sales section → Auto Expense Report	Auto Expense

<sup>1</sup> Specifies what each line in the search list represents.



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Back Orders	Purchase receipts associated with the original purchase	<i>Purchasing</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Purchase Receipts</i> option → Choose a purchase receipt for which a backorder was created → <i>View Back Orders</i>  icon in lower right corner of screen	Receipt Back Orders
Batch	Invoices in the selected batch	<i>Invoice</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Invoice Batches</i> option → Click into batch	Invoice Batch (Details)
Branches	Branches defined for the organization in Aspire Admin	<i>Administration</i> screen → <i>Manage Branches</i>  icon under <i>Organization</i>	Branch
Budgets	Annual cost/revenue budgets defined for the organization in Aspire Admin	<i>Administration</i> screen → <i>Manage Budgets</i>  icon under <i>Estimating</i>	Budget
Catalog Item Category	Catalog item categories established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Catalog Item Category</i> option	Catalog Item Category
Catalog Price List	Catalog price lists established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Catalog Price List</i> option	Catalog Price List
Certification Type	Certification types established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Certification Type</i> option	Certification Type
Certifications	Employee Certifications recorded on the HR tab of the Contact screen for employee or subcontractor contacts	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Administration</i> section → <i>Certifications</i>	Certifications
Client Management	Per property, summarizes contract losses, new contracts, or upsell work orders during a specified period as defined for a KPI.	<i>Home</i> screen → <i>KPI Section</i> → <i>Any Client Management KPI</i> → Click on chart	KPI Client Management Report
Clock Time	Clock in/out entries	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Administration</i> section → <i>Clock Time</i>	Clock Time

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Companies	Companies with which contacts may be associated	Administration screen → Manage Companies  icon under CRM	Company
Competitor	Competitors	Administration screen → Manage Lists  icon under Application → Select Competitor option	Competitor
Completed Labor Efficiency	Per property, summarizes hours estimated, scheduled and completed during a specified period as defined for a KPI.	Home screen → KPI Section → Any Completed Labor Efficiency KPI → Click on chart	KPI Completed Labor Efficiency Report
Completed Work Tickets	Work tickets represented by the selected number on the report	Reports  icon in the Aspire Navigation Bar → Completed Work Profit and Loss Report → Click on a row in the revenue or expenses section	Work Ticket (Generic)
Completed Work Tickets	Work tickets represented by the selected number on the report	Opportunity  icon in the Aspire Navigation Bar → Opportunities Screen → Select a contract opportunity → Contract screen → Ellipses  icon (upper right) → Job Report → Report   Job screen → Click into a number in one of the listed services	Work Ticket (GenericOpportunity)
Construction WIP Adjustments	List of work order opportunities with associated cost to complete.	Reports  icon in the Aspire Navigation Bar → Standard Report tab → Production section → Construction WIP Adjustments	Construction WIP Adjustments
Contact Type	Contact types established from Aspire Admin	Administration screen → Manage Lists  icon under Application → Select Contact Type option	Contact Type
Contacts	Contacts	Contacts  icon in the Aspire Navigation Bar	Contact
Contract Renewals	Contracts that are due for renewal including contracts that have been renewed. Contracts become due for renewal 45 days after their start date.	Reports  icon in the Aspire Navigation Bar → Standard Report tab → Sales section → Contract Renewals	Contract Renewal

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
 Create Back Order	Items on the purchase receipt that can be partially ordered	Purchasing  icon in the <i>Aspire Navigation Bar</i> → <i>Purchase Receipts</i> option → choose a purchase receipt → Options (lower right corner) → <i>Receive Partial</i> option	Receipt Allocations
Credit Memos	Credit Memos	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → locate <i>Credit Memos</i> section in report → Click into dollar value	Credit Memo
 Deposits	Individual bank deposits	<i>Invoice</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Deposits</i> option	Bank Deposit
Depreciation Report	Equipment that experienced depreciation during the report period	<i>Equipment</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Depreciation Report</i> option	Depreciation Report
 Devices	Aspire device registrations	<i>Administration</i> screen → <i>Manage Devices</i>  icon under <i>Application</i>	Device
 Districts	Districts defined for the organization in Aspire Admin	<i>Administration</i> screen → <i>Manage Districts</i>  icon under <i>Organization</i>	District
 Division	Divisions established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Division</i> option	Division
 Electronic Payments Log	Electronic payments	<i>Invoice</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Electronic Payments Log</i> option	Electronic Payments (ELECTRONICPAYMENT)
Employee Clock Time Report	List of employees or subcontractors and whether they have clock time during the prior seven days.	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Employee Clock Time</i>	Employee Clock Time
 Employee Incident Type	Employee incident types established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Employee Incident Type</i> option	Employee Incident Types
Employee Incidents	Employee incidents recorded in Aspire	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Drill Down Reports</i> section → <i>Employee Incidents</i> option	Employee Incidents

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Employees	Contacts of type "Employee"	<i>Scheduling</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Schedule Board</i> screen → Right click on day → <i>Open Time Entry</i> option → <i>Time Entry</i> screen → <i>Green Plus</i>  icon in upper right corner	Employee
Equipment	Equipment items	<i>Equipment</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Equipment</i> option	Equipment
Equipment Classes	Equipment classes defined in Aspire Admin	<i>Administration</i> screen → <i>Manage Classes</i>  icon under <i>Equipment</i>	Equipment Class
Equipment Disposal Reasons	Equipment disposal reasons defined in Aspire Admin	<i>Administration</i> screen → <i>Manage Disposal Reasons</i>  icon under <i>Equipment</i>	Equipment Disposal Reason
Equipment Maintenance Due	Equipment maintenance services that are due based on equipment service schedules	<i>Equipment</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Maintenance Due</i>	Services Due
Equipment Manufacturers	Equipment manufacturers defined in Aspire Admin	<i>Administration</i> screen → <i>Manage Manufacturers</i>  icon under <i>Equipment</i>	Equipment Manufacturer
Equipment Models	Equipment models defined in Aspire Admin	<i>Administration</i> screen → <i>Manage Models</i>  icon under <i>Equipment</i>	Equipment Model
Equipment Readings Log	Equipment meter readings recorded.	<i>Equipment</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Reading Logs</i>	Equipment Reading Log
Equipment Service Logs	Equipment service log entries	<i>Equipment</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Service Log</i> option	Equipment Service Log
Equipment Service Tags	Equipment service tags defined in Aspire Admin	<i>Administration</i> screen → <i>Manage Service Tags</i>  icon under <i>Equipment</i>	Equipment Service Tag
Equipment Sizes	Equipment sizes defined in Aspire Admin	<i>Administration</i> screen → <i>Manage Sizes</i>  icon under <i>Equipment</i>	Equipment Size

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Estimate Custom Columns	Custom columns available on the Estimate screen as defined in Aspire Admin	Administration screen → Manage Estimates Custom Column  icon under Estimating	Estimate Custom Columns
Event Types (no title displayed on screen)	Event types established from Aspire Admin	Administration screen → Manage Lists  icon under Application → Select Event Type option	Event Type
Events	List of events logged	Invoice  icon in the Aspire Navigation Bar → Log Events option	Event Type (Customer Events)
Expense Work Tickets	Work tickets represented by the selected number on the report	Reports  icon in the Aspire Navigation Bar → Profit & Loss Monthly Report → Click into number in one of the following columns: Revenue, Material, Equip, Sub, Other	Work Ticket (P&L Monthly)
Expense Work Tickets	Work tickets represented by the selected number on the report	Reports  icon in the Aspire Navigation Bar → Profit & Loss Report → Click into number in one of the following rows: Earned, Labor, Material, Equipment, Sub and Other	Work Ticket (P&L)
Forecast - Labor	Summarizes estimated labor cost per opportunity during the period specified by the KPI.	Home screen → KPI Section → Any Forecast Report → Click on Labor bar	KPI Forecast Report (Labor Actual)
Forecast - Revenue	Summarizes estimated revenue per opportunity during the period specified by the KPI.	Home screen → KPI Section → Any Forecast Report → Click on Revenue bar	KPI Forecast Report (Revenue Actual)
Forecast Budget - Budget	Summarizes anticipated revenue and labor cost based on annual budget split out by division and budget item type.	Home screen → KPI Section → Any Forecast Report → Click on Revenue or Labor budget bar	KPI Forecast Report (Budget)
Forms	mTime Forms defined in Aspire Admin	Administration screen → Manage Forms  icon under Scheduling	Form
Fuel Cost	Fuel Consumption/Cost by Equipment	Equipment  Icon in the Aspire Navigation Bar → Fuel Cost Report option	Fuel Consumption

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Fuel Rates	Establish fuel costs by branch	<i>Equipment</i>  Icon in the <i>Aspire Navigation Bar</i> → <i>Fuel Rates</i> option	Fuel Rates
Industry	Industries established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Industry</i> option	Industry
Inventory Adjustments	Adjustments to inventory quantities during the period specified on the <i>End of Month Report</i>	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → <i>Inventory</i> tab → locate <i>Inventory Quantity Changes</i> section → Click on line	Inventory Adjustments
Inventory Allocations	Each line represents inventory level for items in the item catalog that are marked as <i>Inventory Items</i> .	<i>Administration</i> screen → <i>Manage Inventory Locations</i>  icon under <i>Purchasing</i> → <i>Inventory Locations</i> screen → Click into one of the locations and select the <i>Allocations</i> tab	Inventory Allocation
Inventory Cost Adjustments	Adjustments to item costs for inventory items during the period specified on the <i>End of Month Report</i>	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → <i>Inventory</i> tab → locate <i>Inventory Catalog Cost Changes</i> section → Click on line	Inventory Cost Adjustments
Inventory Job Materials	Items that entered or left job inventory during the period specified on the <i>End of Month Report</i>	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → <i>Inventory</i> tab → locate <i>Job Inventory Materials</i> section → Click on line	Inventory Job Materials
Inventory Locations	Inventory locations defined in Aspire Admin.	<i>Administration</i> screen → <i>Manage Inventory Locations</i>  icon under <i>Purchasing</i>	Inventory Location
Inventory Variance	Items whose purchase cost differed from the catalog item cost during the period specified on the <i>End of Month Report</i>	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → <i>Inventory</i> tab → locate <i>Purchase Cost Differs from Item Catalog</i> section → Click on line	Inventory Variance
Invoice	Taxable invoices for the selected tax jurisdiction during the specified period of the <i>Tax Entity Report</i>	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Reports</i> tab → <i>Tax Entity Report</i> → Click into dollar amount on left half of report.	Invoice Jurisdiction

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Invoice (Payments tab)	Payments made on the selected invoice	 icon in the <i>Aspire Navigation Bar</i> → <i>Invoices</i> option → select an invoice → <i>Payments</i> tab	Invoice Payments
Invoice Adjustments	Adjustments to invoices	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → locate <i>Invoice Adjustments</i> section on the <i>Revenue</i> tab in report → Click into dollar value	Invoice Adjustments
Invoice Batches	Invoice batches	<i>Invoice</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Invoice Batches</i> option	Invoice Batch (Search)
Invoice Electronic Payments	Electronic payments for specific invoice	<i>Invoice</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Invoices</i> option → Select <i>Invoice</i> option → <i>Electronic Payments</i> tab	Electronic Payments (INVOICEELECTRONICPAYMENTS)
Invoice Revenue	Invoices represented by the invoice amount that was clicked into on the <i>Revenue</i> tab of the <i>End of Month Report</i>	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → locate <i>Invoices</i> section in report → Click into dollar value	Invoice Revenue
Invoices	Invoices created in Aspire	<i>Invoice</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Invoices</i> option	Invoice
Invoicing Assistant	Recommendations for creation of invoices based on won opportunities	<i>Invoice</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Invoicing Assistant</i> option	Invoicing Assistant
Issue List	Types of issues established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Issue List</i> option	Issue List
Items	Individual items in the item catalog (material, labor, sub, equipment, other) established in Aspire Admin	<i>Administration</i> screen → <i>Manage Items</i>  icon under <i>Estimating</i>	Catalog Item

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Job Status	Job statuses displayed in Aspire. These names can be modified, but the records cannot be removed.	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Job Status</i> option	Job Status
Lead Source	Lead sources established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Lead Source</i> option	Lead Source
Locality	Localities (usually counties) in Aspire are used to define where employees work for purposes of calculating W2 withholding for payroll taxes.	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select list type of <i>Locality</i>	Locality
Mobile Forms Report	Show values collected for a specific version of a mobile form.	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Mobile Forms Report</i>	Mobile Forms
Operations Scorecard Service Type	Work tickets represented by the selected number on the report	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Operations Scorecard</i> → Click on a service row	Work Ticket (Generic)
Opportunities	Opportunities	<i>Opportunity</i>  icon in the <i>Aspire Navigation Bar</i>	Opportunity
Opportunity Service Report	Services contained in estimates on opportunities	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Reports</i> tab → <i>Drill Down Reports</i> section <i>Opportunity Service Report</i>	Opportunity Service Report
Opportunity Stage	Opportunity stages established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Opportunity Stage</i> option	Opportunity Stage
Opportunity Status	Opportunity statuses established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Opportunity Status</i> option	Opportunity Status
Opportunity Templates	Opportunity templates	<i>Administration</i> screen → <i>Manage Opportunity Templates</i>  icon under <i>Estimating</i>	Opportunity Template

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Overhead Recovery - Budget	Summarizes the budget estimates by year and by branch that comprise the Budget Bar in the associated KPI chart.	Home screen → KPI Section → Any Overhead Recovery Report → Click on Budget bar	KPI Overhead Recovery Report (Actual)
Overhead Recovery - Projected	Summarizes the work tickets representing the costs to be recovered during the period specified by the KPI.	Home screen → KPI Section → Any Overhead Recovery Report → Click on Projected bar	KPI Overhead Recovery Report (Budget)
Pay Code	Pay codes established from Aspire Admin	Administration screen → Manage Lists  icon under Application → Select Pay Code option	Pay Code
Pay Schedule	Pay schedules established from Aspire Admin	Administration screen → Manage Lists  icon under Application → Select Pay Schedule option	Pay Schedule
Payment Category	Payment categories established from Aspire Admin	Administration screen → Manage Lists  icon under Application → Select Payment Category option	Payment Category
Payment Terms	Payment Terms established from Aspire Admin	Administration screen → Manage Lists  icon under Application → Select Payment Terms option	Payment Terms
Payments	Customer payments recorded in Aspire	 icon in the Aspire Navigation Bar → Payments option	Payment
Payments	Customer payments represented by the line drilled into on the Tax Jurisdiction Report.	Reports  icon in the Aspire Navigation Bar → Standard Reports tab → Tax Entity Report → Click into dollar amount on right half of report.	Payment Jurisdiction
Profit & Loss - Budget	Summarizes budgeted revenue, labor cost, direct cost and gross profit for work tickets during the period specified by the KPI.	Home screen → KPI Section → Any Profit & Loss Report → Click on Budget bar (blue) for revenue, labor or gross margin \$	KPI Profit & Loss Report (Budget)
Profit & Loss - Earned Revenue Actual	Summarizes earned revenue for work tickets by division and service during the period specified by the KPI.	Home screen → KPI Section → Any Profit & Loss Report → Click on Actual bar (green) for earned revenue	KPI Profit & Loss Report (Revenue Actual)

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Profit & Loss - Gross Margin Actual	Summarizes actual gross margin for work tickets by division and service during the period specified by the KPI.	<i>Home</i> screen → KPI Section → Any Profit & Loss Report → Click on <i>Actual</i> bar (green) for revenue, labor or gross margin \$	KPI Profit & Loss Report (Gross Margin Actual)
Profit & Loss - Invoiced Revenue Actual	Summarizes invoiced revenue for work tickets by division and service during the period specified by the KPI.	<i>Home</i> screen → KPI Section → Any Profit & Loss Report → Click on <i>Actual</i> bar (green) for invoiced revenue	KPI Profit & Loss Report (Invoiced Actual)
Profit & Loss - Labor Actual	Summarizes labor hours and cost for work tickets by division, property and service during the period specified by the KPI.	<i>Home</i> screen → KPI Section → Any Profit & Loss Report → Click on <i>Actual</i> bar (green) for labor	KPI Profit & Loss Report (Labor Actual)
Properties	Properties established in Aspire	<i>Properties</i>  icon in the <i>Aspire Navigation Bar</i>	Property
Property Client Budget (no title displayed on screen)	Work order opportunities for the property	<i>Properties</i>  icon in the <i>Aspire Navigation Bar</i> → Select a property → <i>Report</i>  icon (upper right) → <i>Client Budget</i> option → Click into number for a work order (not a contract)	Property Client Budget
Property Group	Property groups established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Property Group</i> option	Property Group
Property Opportunities (Embedded in <i>Property Overview</i> screen)	Opportunities for the property	<i>Properties</i>  in the <i>Aspire Navigation Bar</i> icon → Select a <i>Property</i> → Search list appears about half-way down the screen	Opportunity (Property)
Property Route Assignment	Summarize the assignment of properties to routes as defined on the <i>Property</i> tab of the <i>Route</i> screen.	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Reports</i> tab → <i>Drill Down Reports</i> section <i>Property Route Assignments Report</i>	Property Route Assignment
Property Status	Account receivables list of invoices with associated payments and credit memos	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>A/R Aging List</i>	Property Status

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Purchase Receipt Work Tickets (no title displayed on screen)	Work tickets	<i>Purchasing</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Purchase Receipts</i> option → Select a purchase receipt → <i>Purchase Receipt</i> screen → <i>Work Ticket Search</i>  icon	Work Ticket Time Entry
Purchase Receipts	Purchase receipts created in Aspire	<i>Purchasing</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Purchase Receipt</i> option	Receipt
Purchasing Assistant	Recommended purchases based on materials included on opportunity estimates	<i>Purchasing</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Purchasing Assistant</i> option	Purchasing Assistant
Receipt Status	Activity (email, issue, task or appointment)	<i>Home</i> screen → <i>Search Activities</i>  icon in <i>To Do List</i> section	Receipt Status
Receivables	Total receivables owed by customer	<i>Invoice</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Receivables</i> option	Accounts Receivable
Regions	Regions defined for the organization in Aspire Admin	<i>Administration</i> screen → <i>Manage Regions</i>  icon under <i>Organization</i>	Region
Report   Transaction List	Invoice, payment and credit transactions for the property	<i>Property</i>  icon in the <i>Aspire Navigation Bar</i> → Select a property → <i>Report</i>  icon (upper right) → <i>Transaction List</i> option	Transaction List
Reports	Reports saved by the user currently logged in	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Favorite Reports</i> tab	Report Favorite
Revenue Over Under	Opportunities matching the over/under valued drilled into for which the earned revenue does not match invoiced revenue	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → locate <i>Over/Under</i> section on <i>Revenue</i> tab in report → Click into dollar value	Revenue Over/Under

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Revenue Variance	Revenue variance records generated by Aspire as explained in the article, <a href="#">Revenue Variance</a>	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>End of Month Report</i> → locate <i>Revenue Variance</i> section on <i>Revenue</i> tab in report → Click into dollar value	Revenue Variance
Routes	Routes created in Aspire	<i>Administration</i> screen → <i>Manage Routes</i>  icon under <i>Scheduling</i>	Route
Sales Commission	Invoices for each opportunity upon which sales commissions can be based	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Drill Down Reports</i> section → <i>Sales Commission</i>	Sales Commission
Sales Score Card	Summarizes sales scorecard records for the period specified by the KPI.	<i>Home</i> screen → KPI Section → Any Sales Score Card KPI → Click on chart	KPI Sales Score Card Report
Sales Type	Define Activity Categories	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Activity Category</i> option	Sales Type
Schedule an Event	Opportunity Services	<i>Scheduling</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Scheduling</i> option → <i>Schedule Board</i> screen → <i>Bulk Actions</i>  icon → <i>Schedule an Event</i> option	Schedule an Event
Schedule Work Tickets (no title displayed on screen)	Work tickets	<i>Scheduling</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Schedule Board</i> screen → <i>Show Work Tickets</i>  icon in lower right-hand corner	Schedule (Tickets)
Score Card Detail	List of opportunities that comprise the value of closed sales that was selected on the sales scorecard	<i>Contacts</i>  icon in the <i>Aspire Navigation Bar</i> → Select contact (must be an employee user for whom a sales scorecard has been established) → <i>Contact</i> screen → <i>Scorecards</i> tab → Drill into a scorecard in the list → Click into a number on the <i>Closed Actual</i> column	Sales Scorecard Closed
Score Card Detail	List of opportunities that comprise the value of proposed sales that was selected on the sales scorecard	<i>Contacts</i>  icon in the <i>Aspire Navigation Bar</i> → Select contact (must be a user for whom a sales scorecard has been established) → <i>Contact</i> screen → <i>Scorecard</i> tab → Drill into a scorecard in the list → Click into a number on the <i>Proposed Actual</i> column	Sales Scorecard Proposed
Select Attachment	Existing attachments on emails, issues, opportunities and properties	<i>Home</i> screen → Click Bar in graph under <i>Customer Issues</i> → Click one of the <i>Issues</i> → <i>Find Old Attachments</i>  icon	Attachment

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
		Home screen → Search Activities  icon under To Do List → Click an email or issue item → Find Old Attachments  icon	
Services	Services established in Aspire Admin	Administration screen → Manage Services  icon under Estimating	Service
Services	Work tickets that comprise the number value clicked	Properties  icon in the Aspire Navigation Bar → Select a property → Select the More... link to the right of the next visit link → Full Property Wizard screen → Click on one of the service or division numbers	Work Ticket (Generic)
Site Audit Categories	Site audit categories established from Aspire Admin	Administration screen → Manage Site Audit Categories  icon under Scheduling	Site Audit Category
Site Audit Types	Site audit types established from Aspire Admin	Administration screen → Manage Service Notifications  icon under Scheduling	Site Audit Type
Site Audits	Site audits for the selected property	Properties  icon in the Aspire Navigation Bar icon → Select a Property → Previous Site Audit hyperlink (middle left of the page)	Property Site Audit
Site Audits	Site Audit	Reports  icon in the Aspire Navigation Bar → Standard Report tab → Drill Down Reports section → Site Audits	Site Audit
Swap Work Ticket Costs	Work tickets	Scheduling  icon → Schedule Board screen → Right Click on day → Open Time Entry option → Time Entry screen → Left click on a ticket link → Swap Ticket Cost option	Work Ticket (Move Cost)
Tag	Define available tags for properties, contacts and opportunities	Administration screen → Manage Lists  icon under Application → Select list type of Tag	Tag
Takeoff Group	Advanced Search Formulas established in Aspire Admin	Administration screen → Manage Advanced Search Formulas  icon under Application	Takeoff Group

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Tax Entity	Creation or modification of clock in/out entries for the selected employee	Scheduling  icon in the <i>Aspire Navigation Bar</i> → <i>Schedule Board</i> → <i>Weekly Time Review</i>  icon → Click a time entry → Select <i>Clock Time Audit</i> option	Tax Entity
Tax Jurisdiction (no title displayed on screen)	Tax jurisdictions established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Tax Jurisdiction</i> option	Tax Jurisdiction
Time Entry	Work ticket employee time allocations to jobs	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Drill Down Reports</i> section → <i>Time Entry</i>	Time Entry
Time Entry Sync Log	Record of all time entry transactions transmitted from Aspire to QuickBooks during the selected synchronization instance	Only available for Aspire systems set up to export to <i>QuickBooks Desktop</i> by properly integrating with <i>QuickBooks Web Connector</i> .  <i>Scheduling</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Schedule Board</i> screen → <i>Weekly Time Review</i>  icon → <i>Weekly Time Review</i> screen → <i>View Sync Summary</i> link (upper right corner, but only if your system is set up for export to accounting system) → Click on Sync Summary entry for which you want to view additional detail.	Time Entry Sync Log
Time Entry Sync Summary	Record of synchronization attempts between Aspire and your accounting system	Only available for Aspire systems set up to export to <i>QuickBooks Desktop</i> by properly integrating with <i>QuickBooks Web Connector</i> .  <i>Scheduling</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Schedule Board</i> screen → <i>Weekly Time Review</i>  icon → <i>Weekly Time Review</i> screen → <i>View Sync Summary</i> link (upper right corner, but only if your system is set up for export to accounting system)	Time Entry Sync Summary
Time Entry Work Tickets (no title displayed on screen)	Work tickets	<i>Scheduling</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Schedule Board</i> screen → Right click on day → <i>Open Time Entry</i> option → <i>Search All</i>  icon under the ticket list	Work Ticket Time Entry
Unit Type	Measurement unit types as established in Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select list type of <i>Unit Type</i>	Unit Type

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Users	Aspire system users	<i>Administration screen → Manages Users</i>  icon under <i>Application</i>	User
Vendor	Vendors providing materials and services as defined in Aspire Admin or imported from the accounting system	<i>Administration screen → Manage Lists</i>  icon under <i>Application</i> → Select list type of <i>Vendor</i>	Vendor
Weather Events	Weather events as defined on the Events screen available from the Log Event option in the Invoice icon of the Aspire Navigation Bar	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Drill Down Reports</i> section → <i>Weather Events</i>	Weather Events
Weekly Time Review	Row for each week of time. For this search list it is essential that the list be grouped by <i>Employee Display Name</i> (the default)	<i>Scheduling</i>  icon → <i>Schedule Board</i> screen → <i>Weekly Time Review</i>  icon	Weekly Time Review
Work in Progress Report	This drill-down report supports the analysis of work in progress during a specified time period. It is accessed from the Reports screen. The search list returns records that are unique by opportunity, invoice type, branch and division showing breakdown of cost and revenue incurred across these categories over the specified time-period.	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → <i>Drill Down Reports</i> section → <i>Work in Progress</i>	Work in Progress
Work Ticket Notifications	Service notifications established in Aspire Admin determining conditions under which Aspire sends automatic notifications	<i>Administration screen → Manage Service Notifications</i>  icon under <i>Scheduling</i>	Service Notification

Title of List Screen	Items Represented <sup>1</sup>	Location in Aspire	Internal List Name
Work Ticket Status	Clock in/out entries for the selected employee	<i>Scheduling</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Schedule Board</i> screen → <i>Weekly Time Review</i>  icon → <i>Weekly Time Review</i> screen → Click on time value → Select <i>Clock Time Audit</i> option	Work Ticket Status
Work Ticket Transactions	Work ticket visits	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → Drill Down Reports section → <i>Work Ticket Transaction</i>	Work Ticket Transaction
Work Ticket Visits	Work ticket visits	<i>Reports</i>  icon in the <i>Aspire Navigation Bar</i> → <i>Standard Report</i> tab → Drill Down Reports section → <i>Work Ticket Visits</i>	Work Ticket Visits
Work Tickets	Work tickets	<i>Work Tickets</i>  icon	Work Ticket
Workers Compensation (no title displayed on screen)	Workers compensation types established from Aspire Admin	<i>Administration</i> screen → <i>Manage Lists</i>  icon under <i>Application</i> → Select <i>Workers Compensation</i> option	Workers Compensation
Workflow	Workflows established in Aspire Admin	<i>Administration</i> screen → <i>Manage Workflow</i>  icon under <i>Estimating</i>	Workflow