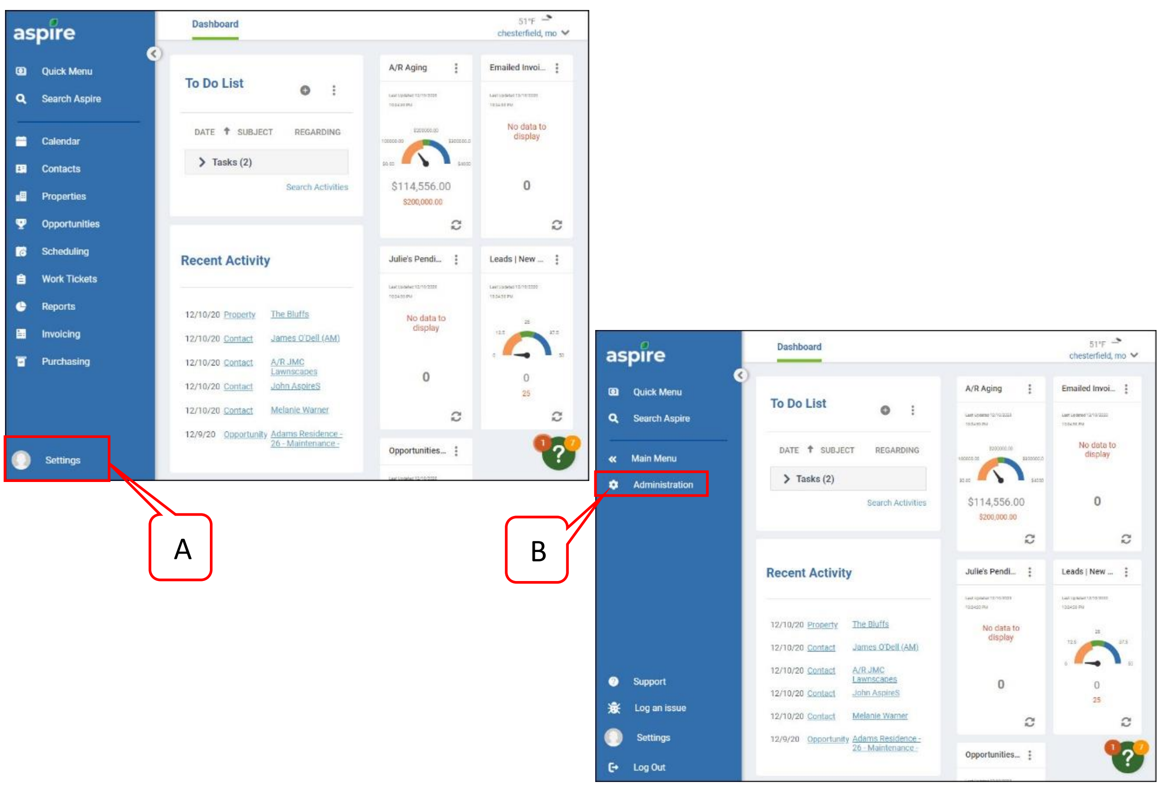
# Aspire System Administration

## Overview of Aspire System Administration

When a new company chooses to utilize Aspire to run their landscape business, the Aspire Deployment team leads them through the process of initially setting up their system. During this process, initial configuration information specific to the company is loaded into the Aspire to define the environment. Some of that information such as initial items and services are bulk loaded into the system based on company-specific spreadsheets. Other information is manually entered into Aspire.

Aspire's *Administration* screen is used by company-designated system administrators to maintain this company-specific information on an ongoing basis after initial deployment. The *Administration* screen is accessed by clicking on the settings icon[a], to display the menu, then clicking on the Administration[b].



## Administration Function Summary

The following table summarizes the information maintained using the Administrative interface.

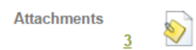
| Group | Icon | Function | Description |
|---|---|---|---|
| | | Application Configuration | Application configuration allows you to establish Aspire system parameters that define the overall behavior of Aspire. You can define company fiscal year start, revenue reporting model (earned or invoiced), time zone, company info such as name and website, time reporting information, invoicing setup and accounting synchronization. |
| **Application** | | | |
| | | Manage Users | Users represent individuals who can log into the Aspire system. Users must initially be created as Contacts. Typically, only contacts of type “employee” are set up as users. Some companies provide user accounts for subcontractors. |
| | | Manage Devices | When a user initiates authorization of a device with Aspire, a person with administrative permissions will go to the devices icon to accept or deny authorization of the device on a specific browser. This option provides a search list that also allows administrators to view all devices authorized on your Aspire system and to deactivate devices if necessary. |
| | | Manage Lists | Aspire provides many administrative lists (i.e. Activity Categories, Divisions, Pay Codes, Tags, etc.) to allow company-specific configuration of the Aspire system. These lists typically represent selection options in associated fields available throughout Aspire. See section Administrative Lists on page 3 for full list. |
| | | Manage User Roles | User roles define Aspire system capabilities that are available to that role. These roles can then be assigned to specific users to determine their capabilities. |
| | | Manage Report Layout Defaults | Aspire provides various places where users can print documents (i.e. proposals, invoices, payments, work tickets, etc.). For any of these documents, multiple layouts may be available for printing the document. The manage default icon gives the company the ability to select the layout they would like as the default in that print screen. |
| | | Manage Advanced Search Formulas | Within search lists throughout Aspire, specific base fields are made available for filtering, grouping and display of the list. Advanced search formulas allow users to create new fields by performing calculations on the base fields. |
| **Estimating** | | | |
| | | Manage Services | Within the Aspire system, a service defines work that a landscape company performs on behalf of its customers. This option allows users to create and manage services. |
| | | Manage Items | Within the Aspire system, a catalog item is a specific labor, material, equipment, subcontractor or other item that is required to estimate and perform a service. This option allows users to manage the list of standard items and their associated characteristics such as purchase units, allocation units and purchase price. |
| | | Manage Workflow | A workflow is a process that can be set up to require approval of an estimate on a contract or work order before Aspire will allow the estimator to submit the proposal to the customer. For each workflow, you define system roles or users who can approve contracts or work orders greater than specific revenue values. Multiple levels of approval authority can be established on the workflow for different revenue values. |
| | | New Optional Service Opportunity | The optional service opportunity function allows a user to create opportunities in bulk from optional services on active won contracts. |

| Group | Icon | Function | Description |
|---|---|---|---|
| | | | For example, a user may want to create opportunities and email proposal letters for optional spring color to all clients under contract that had spring color estimated as an optional service on their contract. |
| | | Manage Pricing | Setting up pricing allows you to specify how much Aspire will markup your costs for labor, materials, equipment, subcontractor or other when calculating the price to charge your customer for services. |
| | | Manage Opportunity Templates | Opportunity templates are created by creating a normal opportunity and then choosing to save it as a template. Once a template has been created in this manner, it can be edited using the Manage Opportunity Templates option. |
| **Purchasing** | | | |
| | | Manage Inventory Locations | Aspire allows materials purchased to be received into inventory for later distribution to active jobs. The Manage Inventory Locations option allows you to specify new locations for inventory and to view the list of catalog items that have been purchased into inventory and allocated from inventory to a job ticket. Admin users will also come to this icon when adjusting on hand quantities and comparing inventory valuations to that in their accounting system. |
| **CRM** | | | |
| | | Manage Companies | Aspire maintains a simple list of companies with whom individual contacts can be tied. The primary purpose for maintaining the list of companies is for association with invoices and payments – especially for commercial properties. |
| | | Manage Audit Items | Aspire supports the management of Quality Audits on properties to validate work quality and to support ongoing work quality improvement. Quality Audit Items define evaluation areas and criteria for quality audits. |
| **Scheduling** | | | |
| | | Manage Routes | In Aspire, routes are used for scheduling crews to perform jobs. In their simplest and most common form, a route is defined based on the crew leader responsible for overseeing the team that travels together on the route. Routes may optionally define the crew members for the route and/or the properties that are regularly visited on the route. |
| | | Manage Service Notifications | Aspire can be set up to automatically send notifications to contacts when the status on specific tickets for specified services change. This option provides the ability to set up these notifications. |
| **Organization** | | | |
| | | Branches | Aspire allows landscape companies to divide their companies into branches. Branches typically represent separate market areas where the company does business. For example, if a landscape company does business in four different cities within two states, they might establish four branches – one for each city. It is common for each branch to have a branch manager responsible for the operation of that branch. |
| | | Regions | Branches can be grouped together into regions. Invoicing settings may be set at the Region level. The following reports provide the ability to aggregate or filter data by Region: Profit and Loss Ticket, Contract Renewal and Time Entry. |

## Administrative Lists

Aspire provides many administrative lists (i.e. Activity Categories, Divisions, Pay Codes, Tags, etc.) to allow company-specific configuration of the Aspire system. They are available from the

*Manage Lists* option described in the table above.  These lists typically represent selection options in associated fields available throughout Aspire.

| List | Description | Location Referenced in Aspire |
|---|---|---|
| **Activity Category** | Activities are classified into types of email, task, issue or appointment. Activity Categories allow you to provide further descriptive breakdown for issues and tasks. (i.e. for an Issue the Category could be Complaint or Service Request) | Category drop down selection on the *Issue* screen or *Task* screen. |
| **Attachment Type** | This list allows you to provide classifications for attachments that team members add to properties, opportunities and contacts. Common attachment types often used in Aspire are Photo, Document, Map, Site Map, and Contract. | Property attachments can be added and viewed from the *Property Overview* screen.<br>Opportunity attachments can be added and viewed from the *Opportunity Details* screen.<br><br>Attachment type is specified when adding an attachment. |
| **Catalog Item Category** | This list allows you to provide categories for logically grouping items in your item catalog. Common item categories commonly used in Aspire include Labor, Mulch, Irrigation, Equipment, Fertilizer, Drainage, Sub, Chemical, Soil, Tree, Sod, and Seed. Item Category provides greater refinement for item grouping than does Item Type. | Catalog Item Categories are selected when adding or updating catalog items on the *Item* screen. They can be used for refining item selections on the *Items List* screen available under Administration. |
| **Catalog Price List** | Used for setting up pricing overrides at the branch level for specific items in the catalog. | Catalog Price Lists are tied to Branches on the *Branches* screen. They are also tied to Items defined on the *Items* screen. |
| **Competitor** | This list allows you to identify competitors to be added to properties. For lost opportunities, Aspire allows you to record the competitor who took the business. | Drop down list on the *Info* tab of the *Property* screen. Also, available during the process of marking an opportunity as "Lost". |
| **Contact Type** | Allows you maintain a list of contact types to help define contacts. Four contact types – Employee, Customer, Vendor, Sub – are fixed and cannot be modified. Other common contact types commonly used in Aspire are Prospect, Lead and Consultant. | Drop down list on the Contact screen. |
| **Division** | Aspire allows recognition of business divisions within a company. Divisions in Aspire are designed to support reporting by service area. This list allows you to define your company's divisions. The most common divisions for companies using Aspire include maintenance, enhancements, snow, irrigation, and overhead. Other common divisions are construction, subcontractor, indirect, internal, plant healthcare and landscape. | Divisions are commonly used in Aspire reports for breaking out hours, cost and revenue. |
| **Industry** | This list allows you to define industries that can be associated with properties. The most common industries for companies using Aspire are Retail, Residential, HOA, Multi-Tenant, Commercial, Industrial, Apartment, Government, and Church. | Drop down list on the Property screens (Ex. – Commercial A, HOA, etc.) |
| **Issue List** | A list of tags can be created for production crews to classify issues recognized on properties. The most common issue tags for companies using Aspire are Property Damage, Irrigation Leak, Injury, Customer Complaint, Dead Plant, and Drainage. | This list of tags is only available in the mobile time app (mTime) for the crew when taking photos from their mobile device. |
| **Job Status** | Aspire supports four standard job status codes that are used to specify the progress of a job: In Process, Complete, Canceled, | Displayed in the *Status* field on the *Opportunity* screen for a job after it has |

| List | Description | Location Referenced in Aspire |
|---|---|---|
| | Change. This list allows you to specify an alternate display name for each of these statuses. | been won. Prior to that, Opportunity Status is displayed. |
| **Lead Source** | This list allows you to maintain a list of valid lead sources that that your team members can specify for an Opportunity. The most common lead sources in Aspire are Issue, Employee Referral, Call In, Cold Call, Customer Referral, Unknown, Website and Architect. | Drop down list on the *Property* and *Opportunity* screens for identifying how the property or opportunity was referred. |
| **Locality** | Localities in Aspire are used to define where employees work for purposes of calculating payroll taxes. The Locality admin list defines the valid localities / counties that can be assigned to properties. | The Locality/County can be selected for properties on the drop-down list on the *Property* screen.<br>Aspire transmits associated locality / county information along with employee time information to your payroll system (i.e. QuickBooks or Paychex). |
| **Opportunity Stage** | An *Opportunity Stage* is a list of fixed stages through which Aspire advances opportunities based on user actions. These stages are fixed in Aspire and are: Pre-Bid, Estimate, Propose, Lost and Won. The admin list for opportunity stages is read-only. These stages support filtering and grouping of opportunity statuses for reporting using the Opportunity List. | Available in drop-down list when initially defining Opportunity Statuses in the *Opportunity Status Admin List*.<br>Opportunity Stage and Opportunity Stage Sort are available for display, grouping and filtering in the *Opportunities Search List* screen. |
| **Opportunity Status** | As an Opportunity is advanced through the business flow, Aspire updates the opportunity status. There are eight standard opportunity statuses through which an opportunity can advance until it is won or lost: New, Bidding, Pending Approval, Approved, Denied, Won, Lost, and Delivered. In the *Opportunity Status* list, you may provide an alternate display value (labeled as "Item Name") for any status. Aspire will allow you to add additional opportunity statuses, but you should only add them for the pre-bid opportunity stage – Aspire will ignore any opportunity statuses for other stages. | The opportunity status is displayed on the Opportunity screen (Contract or Work Order). For opportunities in the pre-bid stage, you can select the opportunity status. During other stages, Aspire advances the status based on actions you take.<br>Opportunity status is also available on appropriate search lists and reports for filtering, display and grouping. |
| **Pay Code** | Pay Codes and the information associated with them determine how pay will be calculated for specific employee hours during the regular payroll process. The most common pay codes in Aspire are Hourly, Holiday, Vacation, Salary, Regular and Overtime. Additional information is available in the Aspire User Guide in sections entitled, "Pay Codes" and "Setting up Payroll in Aspire." | Drop down list on the *Time Entry* screen to override the default pay code.<br>Default pay code for a service is defined on the *Service Details* screen.<br>Override pay amounts for individual employees for specific pay codes can be added on the *Override Pay Codes* screen available through the *HR Admin* tab of the *Contact* screen. |
| **Pay Schedule** | A pay schedules allows you to define Aspire's overall behavior related to paying regular time vs. overtime each week. It also allows you to specify the earliest time each day that employees on a specific pay schedule can clock in. A pay schedule is assigned to each employee. The most common pay schedules in Aspire are Salary, Weekly, and Hourly. | Pay schedules are assigned to individual employees on the *HR Admin* tab of the *Contact* screen. |
| **Payment Category** | This list allows you to specify valid payment categories for credit memos that you mark "Credit as Expense". These values are reflected in the End of Month report so that you can enter them into your accounting system each month. | When entering a credit memo on the *Credit Memo* screen, if the "Credit as Expense" checkbox is checked, Aspire prompts for "Expense" rather than "Division". The options available in the *Expense* drop-down list are populated from the *Payment Category* list. |
| **Payment Terms** | This list allows you to provide a list of valid payment terms that your company can assign to properties. These terms are used for calculating invoices past due in the aging report. | Payment terms may be selected from drop down lists available on the *Property*, *Opportunity* and *Invoice* screens. |

| List | Description | Location Referenced in Aspire |
|---|---|---|
| **Property Group** | This list allows you to define groups into which related properties may be placed. For example, you may group together properties located in the same office park, campus, subdivision or HOA. Property groups are assigned to properties. | Property groups may be associated with properties from a drop-down list on the *Info* tab of the *Property* screen. Property group is also available on the *Property* search list for filtering, display and grouping. |
| **Property Status** | This list allows you to define a status that can be assigned to properties. It is typically used for managing the sales process. In Aspire, the most common property statuses are Prospect, Customer, Past Customer and Prior Bid. | Property statuses are assigned to properties from a drop-down list on the drop-down list on the *Property* tab of the *Property* screen. |
| **Receipt Status** | This list defines stages through which Aspire advances purchase receipts based on user actions in the system. These stages are fixed in Aspire and have status codes of: New, Received, Approved and Complete. Aspire does allow you to provide an item name for each of these codes for display purposes. | The receipt status is shown on the *Purchase Receipt* screen. Additionally, these statuses support filtering and grouping of purchase receipts for reporting using the *Purchase Receipt* search list. |
| **Sales Type** | This list allows you to define the type of sale for each opportunity. The most common sales types maintained in Aspire are New Sale and Renewal. Sales type provides one of the criteria on which Sales Score Cards can be created to track sales person performance. | Sales type can be selected for an opportunity on the *Opportunity Detail* screen.<br>Sales type can be selected on the *Sales Score Card* screen. |
| **Service Type** | This list allows you to define service types used to classify your services and to association each one with a division. It allows you to define a more detailed breakdown of services than what is provided by divisions. In Aspire, the most common service types are Irrigation, Subcontractor, Mulch, Enhancement, Overhead, Maintenance, Pruning, Snow, Construction, Color, Mulching, PHC and Hardscape. | Service type can be selected from a drop-down on the Service screen when adding or modifying a service in the Service Catalog. |
| **Tag** | Tags allow you to create identifiers that can be placed on contacts or properties to classify them for reporting purposes. Each tag you create applies either to a property or to a contact, but not to both. Multiple tags can be added to any contact or property. The most common use of tags is to label contacts or properties as maintenance, installation or enhancement prospects during the sales cycle. | Tags can be added to contacts on the *Info* tab of the *Contact* screen.<br>Tags can be added to properties on the Info tab of the *Property* screen.<br>The *Property Tag List* field is available in the *Property* search list for filtering and display of the list.<br>The *Contact Tag List* field is available in the *Contact* search list for filtering and display of the list. |
| **Takeoff Group** | A takeoff represents something to be measured or counted on a property. The measure or count is then used for estimating. Takeoffs are logically grouped into takeoff groups. For an example, see section "Takeoffs and Takeoff Groups" in the *Aspire User Guide*. The whole structure of takeoff groups and associated takeoff items becomes available for adding specific takeoff values to properties to facilitate estimating jobs. You also tie catalog items to the takeoff item relevant to estimating cost for that catalog item. | From the *Property Overview* screen, you can edit property-specific takeoff values by clicking the *Edit Takeoffs* icon .<br>From any of the *Catalog Item* screens (Labor, Material, Equipment, Sub, Other or Kit), you can select the takeoff appropriate for the catalog item. |
| **Tax Entity** | Tax entities represent State, County or City tax locations. Tax entities can be grouped together to define broader areas called tax jurisdictions. See Tax Jurisdiction. | Tax entities are selected from a drop-down list on the *Tax Jurisdiction* screen. |
| **Tax Jurisdiction** | Tax jurisdictions represent areas of overlapping tax entities (i.e. city, county and state) and define the tax structure for that area. Aspire calculates taxes for services of a property based on the tax jurisdiction in which the property is located. | Tax jurisdictions are assigned to properties from a drop-down list on the *Property* tab on the *Property* screen. |

| List | Description | Location Referenced in Aspire |
|---|---|---|
| **Unit Type** | This list allows you to define valid units of measure to be used when setting up items, kits or takeoffs. The most common unit types used in Aspire are Dollars, Tons, Hours, Bags, Lb, LF, Oz, Each, 1 Gal, 3 Gal, 5 Gal, SF, and Box. | Unit types can be selected from a drop-down list on any of the *Catalog Item* screens (Labor, Material, Equipment, Sub, Other or Kit).<br>Unit types can also be selected from a drop-down list on the Takeoff Item screen. |
| **Vendor** | This list allows you to set up a list of vendors you use for purchasing and must align with the setup of your accounting system. Best practice for companies who use QuickBooks, Great Plains or Acumatica is to maintain vendors in those systems, and synchronize Aspire to load vendors. In this case, you will not enter vendors directly into Aspire from the Vendor Admin List screen. | Vendors can be selected from a drop-down list available on the *Purchase Receipt* screen. |
| **Work Ticket Status** | As a Work Ticket is advanced through the business flow, Aspire updates the Work Ticket status. There are five standard work ticket statuses through which work ticket can advance: Open, Scheduled, Pending Approval, Complete and Canceled. In the *Work Ticket Status* list, you may provide an alternate display value (labeled as “Item Name”) for any status. Aspire will not allow you to add additional work ticket statuses. | The work ticket status is displayed on the Work Ticket screen. Aspire advances the status based on actions you take.<br>Work Ticket status is also available on appropriate search lists and reports for filtering, display and grouping. |