

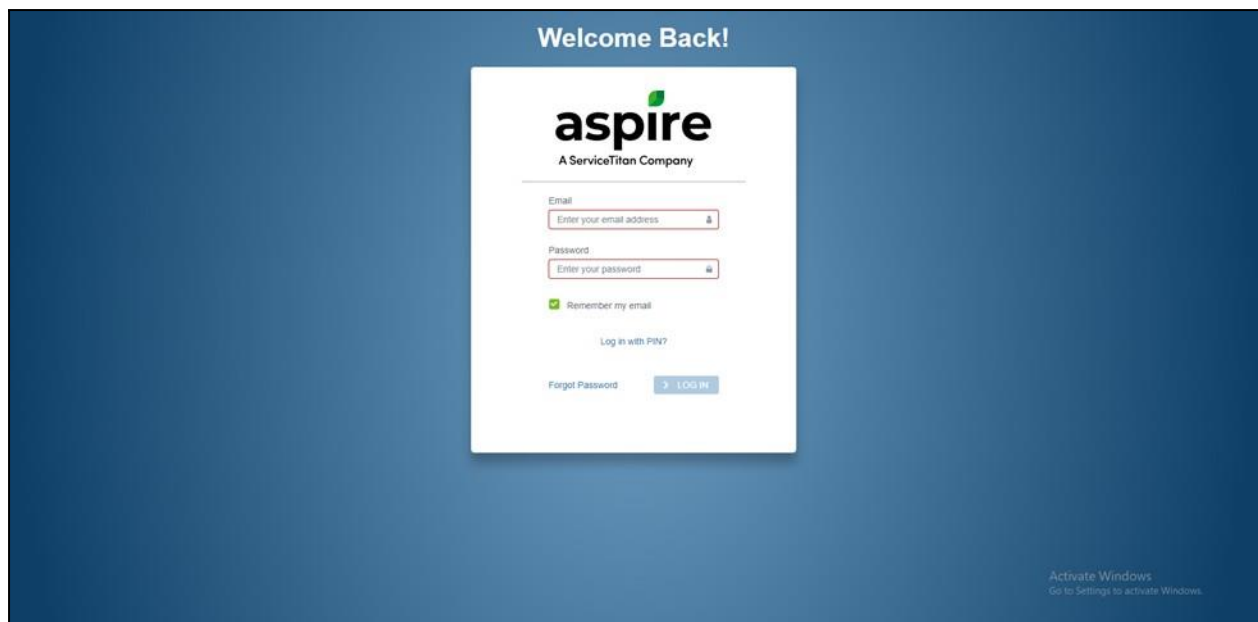
Setting Up Lawn and Fertilizer Applications in Aspire

Fertilization is the process of providing essential nutrients to plants or soil to promote healthy growth and optimal yield. It involves applying fertilizers that contain key elements like nitrogen, phosphorus, and potassium, which are vital for plant development.

To effectively manage and execute fertilization tasks using the Aspire software system, follow these steps:

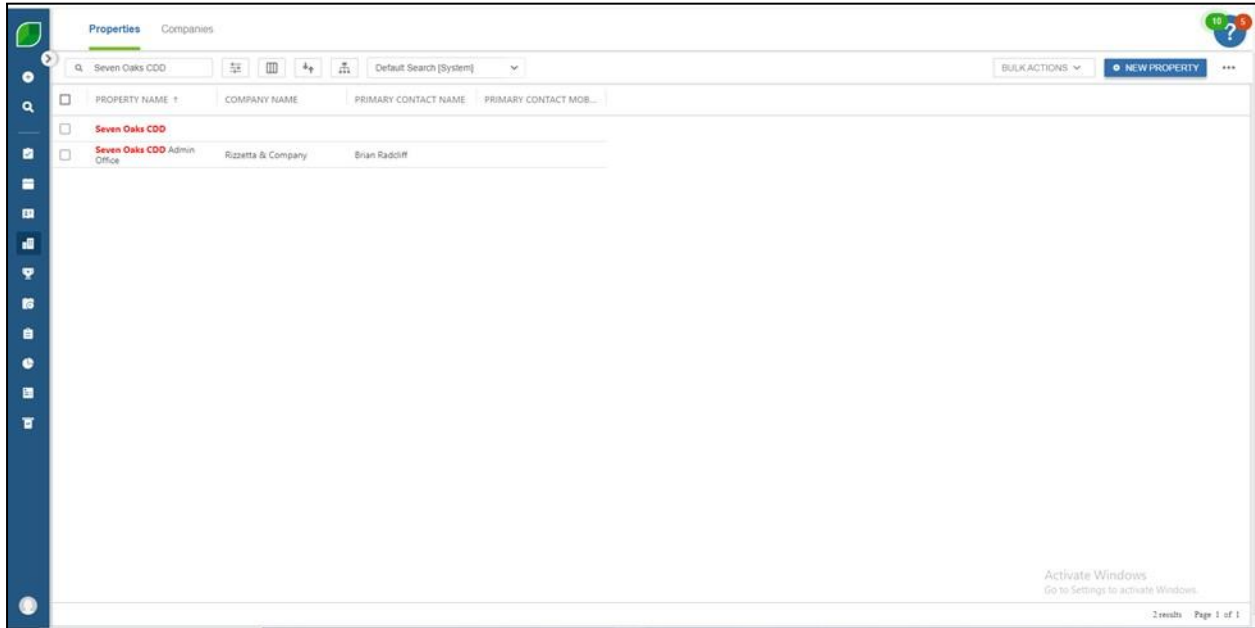
Step 1

Login to Aspire using your credentials.



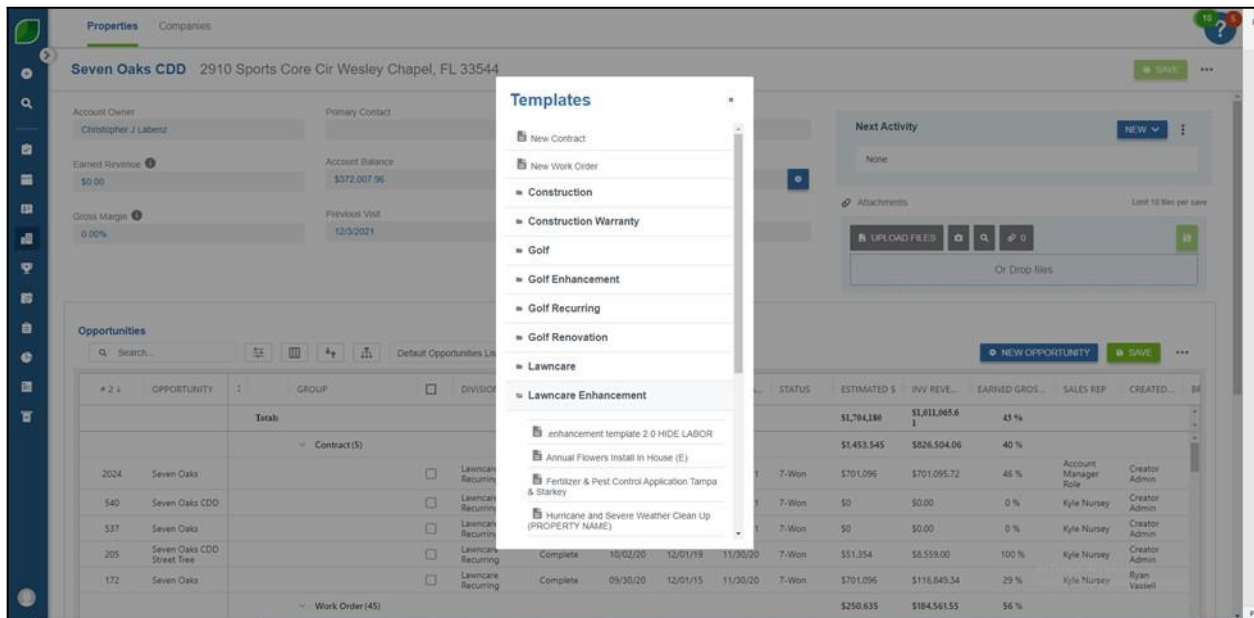
Step 2

Click on **Properties** and enter the property address for which the opportunity is to be created. Select the specific property where the fertilization job needs to be performed.



Step 3

Once you have selected the correct property address, click the **NEW OPPORTUNITY** button and select the template that reflects the services that need to be added, such as 'Turf Fertilization' or a related service.



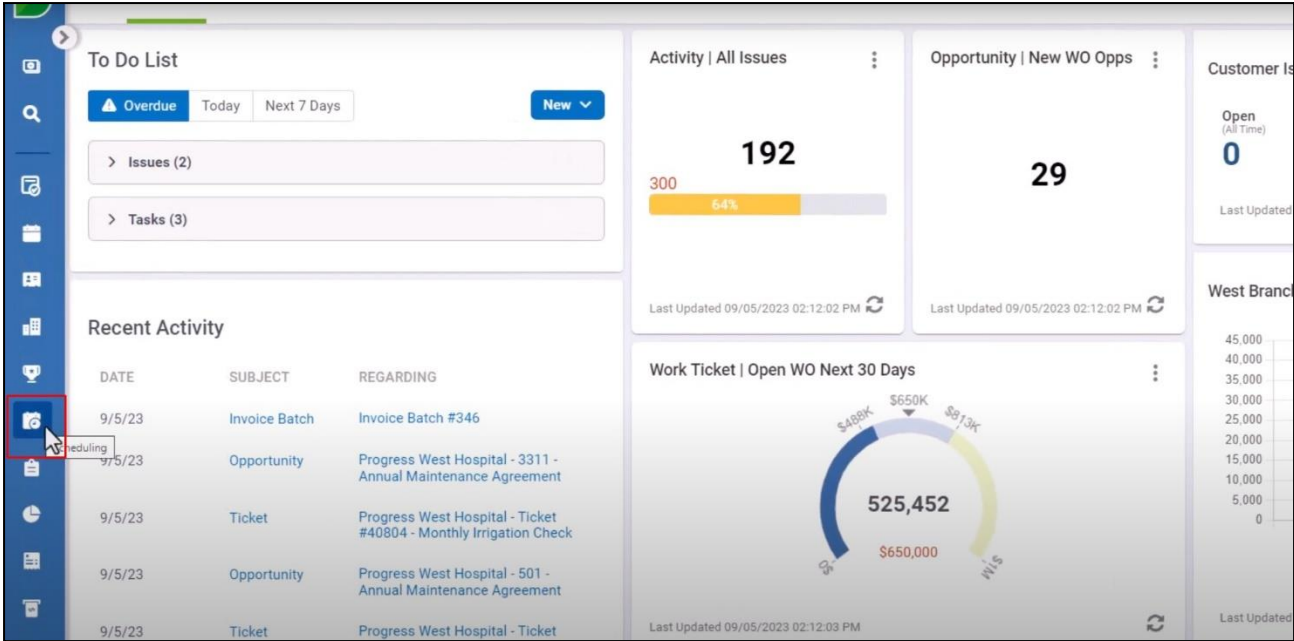
By following these step-by-step instructions within the Aspire system, you can efficiently create opportunities, generate estimates, and capture all the relevant details to ensure successful execution of fertilization projects for the specified properties.

If you have multiple branches, you can select which will offer this service after creating the F&P Service in Aspire.

You can also decide if the service is recurring and if so, how often it should be provided to your customers. Additionally, Aspire allows you to specify the profit margins for each opportunity related to the F&P Service.

Process to Schedule work Tickets in Aspire

- Navigate to the **Schedule Board** and click on the **'Scheduling'** icon in the blue side menu.



- To view available routes, select the **'Manager'** dropdown and click on the **'Work Ticket'** icon on the **Schedule Board** in the top right. These are contract tickets, so utilize the open contract option through today's work ticket list.

The screenshot shows a software interface with a calendar on the left and a list of work tickets on the right. A dropdown menu is open over the list, showing options like 'Open Contract Thru Today [System Admin]'. The calendar shows dates for Tuesday 5th and Wednesday 6th. The work ticket list includes columns for PROPERTY NAME, SERVICE ABR, EST HRS, and ACTUAL OCCUR. The dropdown menu is titled 'Shared with Me' and lists several options, with 'Open Contract Thru Today [System Admin]' highlighted.

PROPERTY NAME	SERVICE ABR	EST HRS	ACTUAL OCCUR
Busch Stadium	renning Approval	8	08/16/23
Busch Stadium	Weekly Turf MT	10	08/10/23
Busch Stadium	Weekly Turf MT	11	08/23/23
Busch Stadium	Weekly Turf MT	12	08/10/23
Busch Stadium	Fall Cleanup	47	07/18/23
Busch Stadium	Fall Cleanup	48	04/11/23
Busch Stadium	Fall Cleanup	49	04/11/23
Busch Stadium	Fall Cleanup	50	08/23/23
Busch Stadium	Fall Cleanup	51	08/16/23

- To find specific tickets, you will enter 'o' to search for an opportunity and then enter the opportunity number to filter to those specific tickets.

The screenshot shows the same software interface, but with a search filter applied. The search bar contains 'o' and the dropdown menu shows 'Opportunity Type: Contract'. The list of tickets is filtered to show 'Bed Maintenance' tickets for 'LaSanta Villa'. The search bar is highlighted with a red box.

GROUP	PROPERTY NAME	SERVICE ABR	EST HRS	ACTUAL OCCUR
Bed Maintenance (13)				
	LaSanta Villa	Bed Maintenance	1	2
	LaSanta Villa	Bed Maintenance	1	3
	LaSanta Villa	Bed Maintenance	1	4
	LaSanta Villa	Bed Maintenance	1	5
	LaSanta Villa	Bed Maintenance	1	6
	LaSanta Villa	Bed Maintenance	1	13
	LaSanta Villa	Bed Maintenance	1	7
	LaSanta Villa	Bed Maintenance	1	8

- Every contract service has a number of occurrences which reflects how many times you will perform the service. The occurrences are set during the estimating phase and determine how many tickets need to be scheduled.

The screenshot shows a software interface with a calendar on the left and a list of services on the right. The calendar shows dates TUE 5 and WED 6. The service list includes 'Bi-Weekly Mow (8)', 'Irrigation Check (4)', and 'Weekly Turf MT (18)'. The 'Weekly Turf MT (18)' service is expanded, showing a list of tickets for 'Progress West Hospital'. The 'ACTUAL' column for this service is highlighted in yellow, and a red box highlights the value '2' in the 'ACTUAL' column for the first row of the expanded service.

GROUP	PROPERTY NAME	SERVICE A...	EST...	ACTUAL ...	STATUS
>		Bi-Weekly Mow (8)			
>		Irrigation Check (4)			
>		Weekly Turf MT (18)			
	Progress West Hospital	Weekly Turf MT	4.56	2	Open
	Progress West Hospital	Weekly Turf MT	4.56	1	Open
	Progress West Hospital	Weekly Turf MT	4.56	3	Open
	Progress West Hospital	Weekly Turf MT	4.56	5	Open
	Progress West Hospital	Weekly Turf MT	4.56	4	Open
	Progress West Hospital	Weekly Turf MT	4.56	9	Open
	Progress West Hospital	Weekly Turf MT	4.56	8	Open

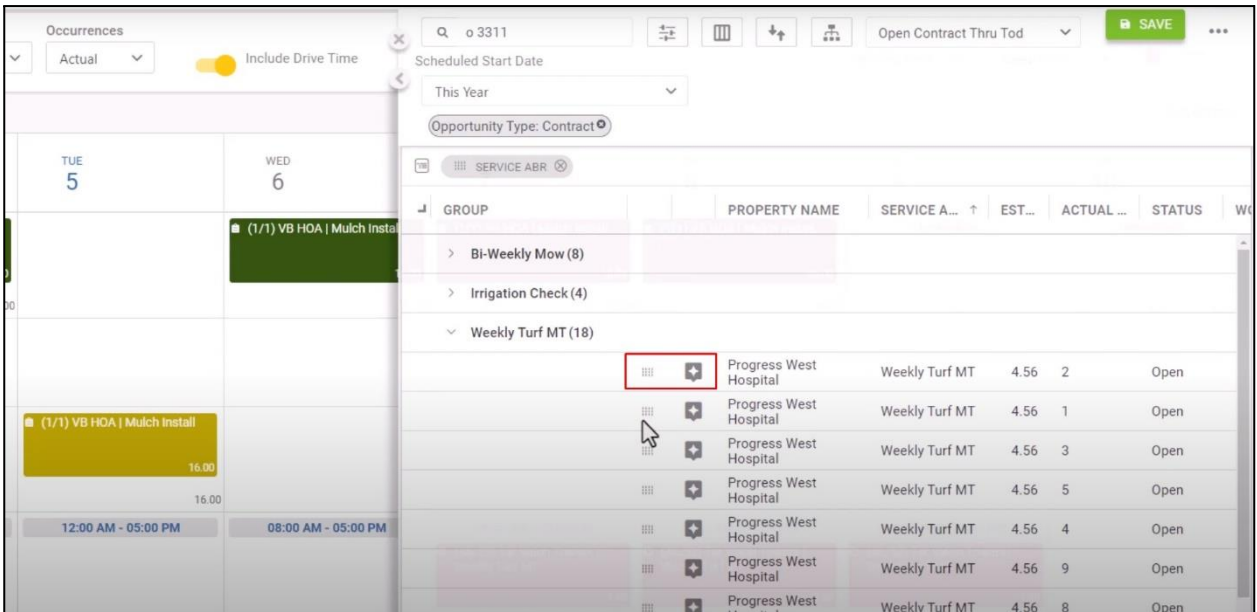
Process to Schedule Weekly Maintenance

- Look at your work ticket list to determine the occurrence number (number of times the service should be performed for that client).

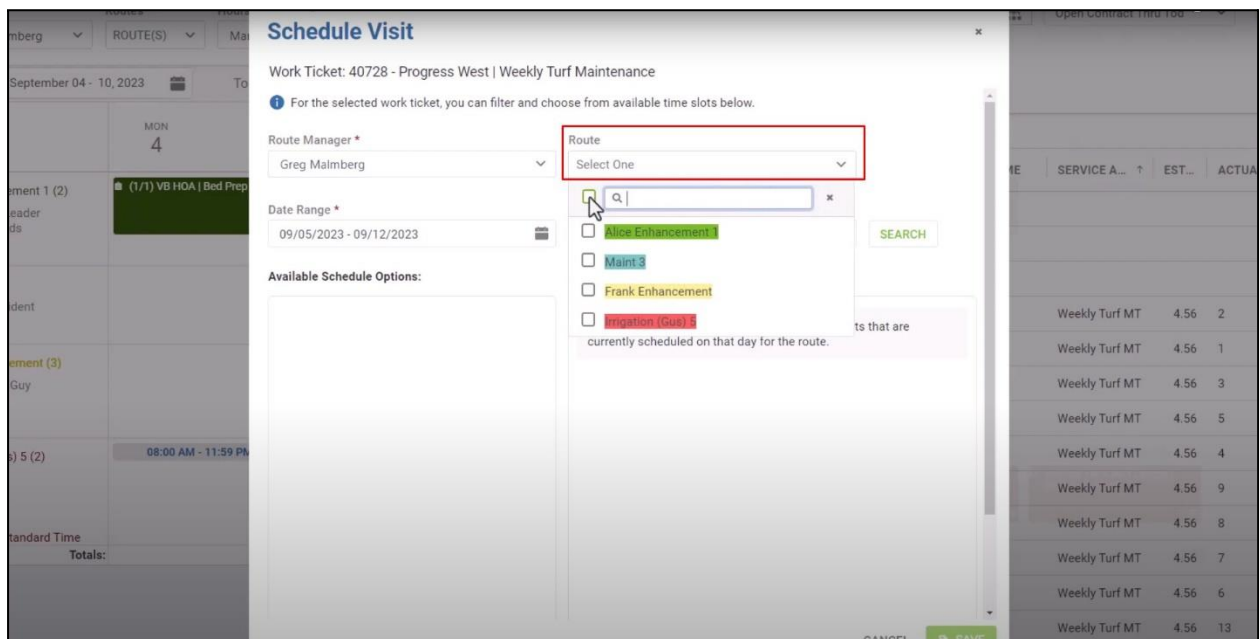
The screenshot shows the same software interface as above. A blue arrow points to the 'ACTUAL' column value of 2 for the 'Weekly Turf MT' service, which is highlighted with a red box. This indicates the number of occurrences for that service.

GROUP	PROPERTY NAME	SERVICE A...	EST...	ACTUAL ...	STATUS
>		Bi-Weekly Mow (8)			
>		Irrigation Check (4)			
>		Weekly Turf MT (18)			
	Progress West Hospital	Weekly Turf MT	4.56	2	Open
	Progress West Hospital	Weekly Turf MT	4.56	1	Open
	Progress West Hospital	Weekly Turf MT	4.56	3	Open
	Progress West Hospital	Weekly Turf MT	4.56	5	Open
	Progress West Hospital	Weekly Turf MT	4.56	4	Open
	Progress West Hospital	Weekly Turf MT	4.56	9	Open
	Progress West Hospital	Weekly Turf MT	4.56	8	Open

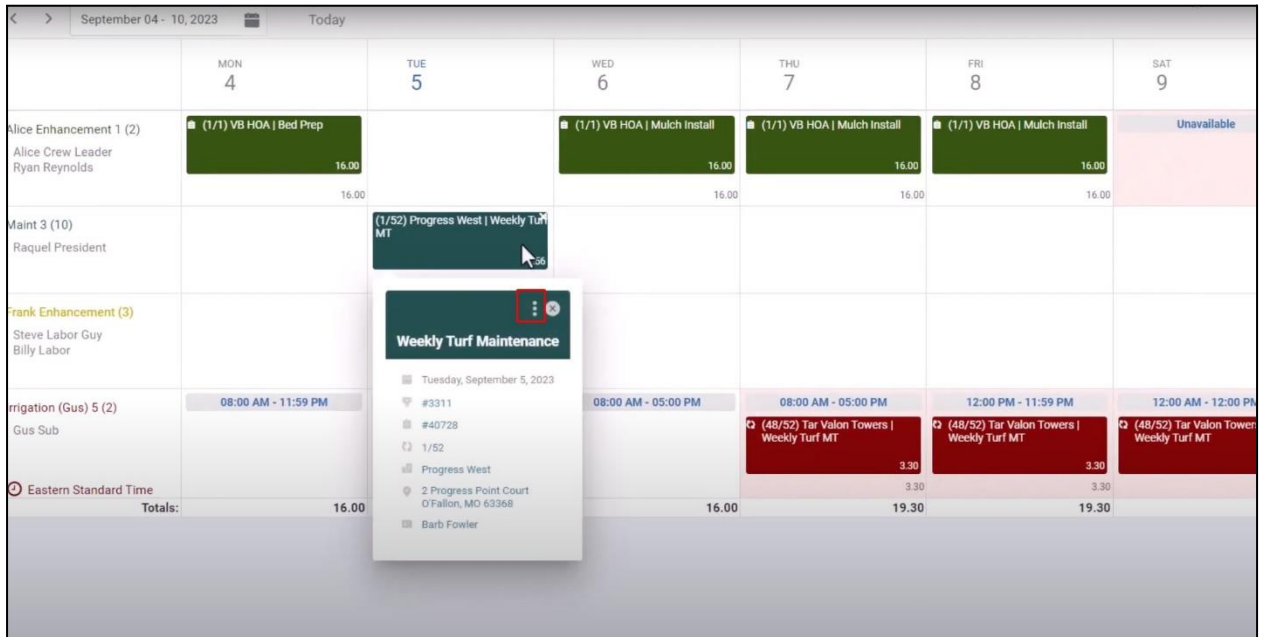
- There are two ways to schedule the first occurrence: either drag and drop it onto the **Schedule Board** if the route and start day are planned or utilize the scheduling assistant. Clicking on the **Scheduling Assistant** icon enables you to easily find routes. This can be especially beneficial when managing multiple routes to ensure sufficient crew hours for each job.



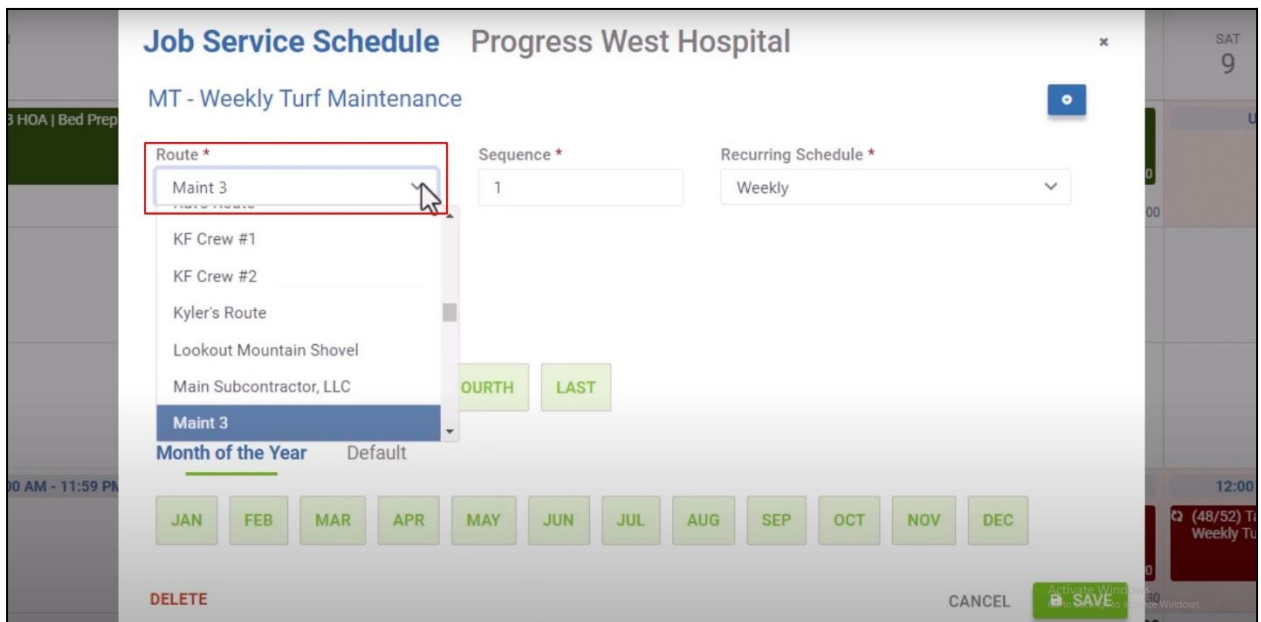
- Choose specific routes by clicking the box next to each route name, then search for available routes and days to schedule your visit. Clicking **'Search'** provides a list of suggested times and dates for this work ticket. If everything appears correct, click **'Save'**.



- Once the first ticket is on the schedule board, you can set the recurring schedule.
- Click on the ticket and then select the three-dot menu and scroll down to **'Edit Recurring Schedule'**.



- On the **Job Service Schedule** screen, confirm the desired route as displayed or change it using the drop down menu.



- **Sequence*** is used to determine the order tickets will be scheduled on any given day. When entering sequence numbers we recommend using multiples of 10 so if a new opportunity is added in the future or a change has to be made, making adjustments is easier. Use the **Recurring Schedule*** drop down to choose the cadence of the service.

The screenshot shows a form titled "MT - Weekly Turf Maintenance". It includes the following fields and options:

- Route ***: A dropdown menu with "Maint 3" selected.
- Sequence ***: A text input field containing the number "1".
- Recurring Schedule ***: A dropdown menu with "Weekly" selected, highlighted with a red border.
- Day of the Week**: A dropdown menu with "Tuesday" selected.
- Week of the Month**: A section with five buttons: "FIRST", "SECOND", "THIRD", "FOURTH", and "LAST".
- Month of the Year**: A section with a "Default" label and twelve buttons for the months: "JAN", "FEB", "MAR", "APR", "MAY", "JUN", "JUL", "AUG", "SEP", "OCT", "NOV", and "DEC".
- At the bottom, there are three buttons: "DELETE" (red), "CANCEL", and "SAVE" (green).

- **Week of the Month** and **Month of the Year** allows you to specify the weeks and months that the service is available to be scheduled. Options that are highlighted green dictate that the service can be scheduled during that timeframe.

This screenshot shows the same form as above, but with a title bar that reads "Job Service Schedule Progress West Hospital". The "Week of the Month" and "Month of the Year" sections are highlighted with red boxes. The "FOURTH" button in the "Week of the Month" section and the "JAN" button in the "Month of the Year" section are highlighted in green. The "Recurring Schedule" dropdown is now set to "Weekly".

- After clicking **'Save'**, verify which ticket occurrence to start with. Since a new opportunity has been added to a schedule, it will begin with the first ticket occurrence.

Job Service Schedule Progress West Hospital

MT - Weekly Turf Maintenance

Route *
Maint 3

Sequence *
1

Recurring Schedule *
Weekly

Day of the Week
Tuesday

Week of the Month
FIRST SECOND THIRD FOURTH LAST

Month of the Year Default
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

DELETE CANCEL **SAVE**

- Click the **'View Schedule'** box, then click **'Save'** to view your planned schedule.

Scheduling Weekly Time Review

Contract Year
2023

Occurrences Remaining
0

SAVE

2023

January: 1-31

February: 1-28

March: 1-31

April: 1-30

May: 1-31

June: 1-30

July: 1-31

August: 1-31

September: 1-30

October: 1-31

November: 1-30

December: 1-31

Scheduling Bi-Weekly and Monthly Using the Work Ticket Icon

- Open your work ticket list and select the first occurrence. Drag and drop your ticket onto the schedule board.

The screenshot shows the 'Scheduling Weekly Time Review' interface. On the left is a calendar grid for September 4-10, 2023. On the right is a list of work tickets. The first row of the list is highlighted, and a red box is drawn around the 'Visit' icon in the 'GROUP' column.

GROUP	PROPERTY NAME	SERVICE A...	EST...	ACTUAL...	STATUS
Progress West Hospital	Progress West Hospital	Bi-Weekly Mow	8	1	Open
Progress West Hospital	Progress West Hospital	Bi-Weekly Mow	8	4	Open
Progress West Hospital	Progress West Hospital	Bi-Weekly Mow	8	3	Open
Progress West Hospital	Progress West Hospital	Bi-Weekly Mow	8	6	Open
Progress West Hospital	Progress West Hospital	Bi-Weekly Mow	8	5	Open
Progress West Hospital	Progress West Hospital	Bi-Weekly Mow	8	8	Open
Progress West Hospital	Progress West Hospital	Bi-Weekly Mow	8	7	Open
Irrigation Check (4)					
Progress West Hospital	Progress West Hospital	Irrigation Check	5	1	Open
Progress West Hospital	Progress West Hospital	Irrigation Check	5	2	Open
Progress West Hospital	Progress West Hospital	Irrigation Check	5	3	Open
Progress West Hospital	Progress West Hospital	Irrigation Check	5	4	Open
Weekly Turf MT (17)					
Progress West Hospital	Progress West Hospital	Weekly Turf MT	4.56	1	Schedule d

- To set the recurring schedule, click on the 'Visit' tile and choose 'Edit Recurring Schedule'. Then, from the recurring schedule dropdown, select 'Days Between'.

The screenshot shows the same scheduling interface, but with a 'Bi-Weekly Bed Maintenance' tile selected on the calendar. A dropdown menu is open over the tile, showing the 'Days Between' option.

MON	TUE	WED	THU	FRI	SAT	SUN
4	5	6	7	8	9	10
Alice Enhancement 1 (2) Alice Crew Leader Ryan Reynolds	(1/1) VB HOA Bed Prep 16.00	(1/1) VB HOA Mulch Install 16.00	(1/1) VB HOA Mulch Install 16.00	(1/1) VB HOA Mulch Install 16.00	Unavailable	Unavailable
Maint 3 (10) Raquel President		(1/52) Progress West Weekly Turf MT 4.56	(1/24) Progress West Bi-Weekly Mow 8.00			
Frank Enhancement (3) Steve Labor Guy Billy Labor		(1/1) VB HOA Mulch Install 16.00				
Irrigation (Gus) 5 (2) Gus Sub	08:00 AM - 11:59 PM	12:00 AM - 03:00 PM				
Totals:	16.00	20.56				0.00

- Enter the number of days between each visit, then click **'Save'** in the lower right to start your schedule with the first occurrence.

The screenshot shows a 'Job Service Schedule' form with the following details:

- Title:** **New Job Service Schedule**
- Route *:** Maint 3
- Sequence *:** 10
- Recurring Schedule *:** Days Between (14)
- Day of the Week:** MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY, SUNDAY
- Week of the Month:** FIRST, SECOND, THIRD, FOURTH, LAST
- Month of the Year:** Default (JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC)
- Buttons:** DELETE, CANCEL, SAVE

By following the process to schedule work tickets in Aspire and using the rescheduling option to dictate weekly/bi-weekly service, or days between work, you can effortlessly create opportunities, generate estimates, and schedule recurring services with accuracy.

Aspire's intuitive interface empowers you to customize service offerings, set profit margins, and establish recurring schedules tailored to the specific needs of each property, ensuring consistent and effective maintenance throughout the season.