

Streamlining the Management of Opportunities and Estimate Creation in Aspire

Managing opportunities and estimate creation in Aspire is important for operational efficiency and client satisfaction. Our team ensures the total efficiency on client-provided opportunities by carefully filling in all necessary fields such as Opportunity Name, Division, OPS Manager, Start and End Date, and other relevant details.

Inputs in various formats like PDFs, CSVs, and Excel files are reviewed and uploaded, including Opportunity Invoice Notes, Estimator Notes, and proposal descriptions.

Based on client data, we create new estimates or revise existing ones, integrating services like Maintenance, Irrigation, and Seasonal Plantation, with pricing evenly distributed monthly within Aspire.

This guide will assist you in adding a new item estimate on the Aspire Care platform. Follow these straightforward steps to ensure your item estimate is correctly entered.

Steps to Add a New Item Estimate

1. Switch to the 'Estimating' tab

- Log in to your Aspire Care account.
- Navigate to the 'Estimating' tab on the dashboard.

The screenshot shows the 'New Kit' form in the 'Estimating' tab. The 'Estimating' tab is highlighted in the top navigation bar. The form includes the following fields and options:

- Item Name ***: Text input field containing 'Accolade Elm - Plant Installed 4'
- Alternate Name**: Text input field containing 'Accolade Elm - Plant Installed 4'
- Category ***: Dropdown menu with 'Accent Fall' selected
- Unit Type**: Dropdown menu with '#1' selected
- Takeoff Item**: Dropdown menu with 'Select One' selected
- Assigned Branch ***: Dropdown menu with 'All Branches' selected
- Available to bid**: Checked checkbox
- Force Single Unit Pricing**: Unchecked checkbox
- Description**: Rich text editor area
- Table Headers**: ITEM NAME, TYPE, FACTOR, UNITS, INVERT, WASTE, UNIT COST, EXTENDED COST

2. Enter the name in 'Item Name' and 'Alternate Item Name'

- Input the primary name of the item in the 'Item Name' field.
- Enter any alternative names for the item in the 'Alternate Item Name' field, if applicable.

This screenshot is identical to the one above, but with red boxes highlighting the 'Item Name' and 'Alternate Name' input fields to emphasize the step of entering the item names.

3. Select the 'Category Type'

- Choose the appropriate category type for the item from the dropdown menu.

The screenshot shows the 'New Kit' form in the Estimating module. The 'Category' dropdown is highlighted with a red box, showing 'Plant - Shade Tree' selected. The form includes fields for Item Name, Alternate Name, Takeoff Item, Assigned Branch, and a description editor. A table at the bottom has columns for ITEM NAME, TYPE, FACTOR, UNITS, INVERT, WASTE, UNIT COST, and EXTENDED COST.

4. Enter the number of 'Unit'

- Specify the number of units for the item in the 'Unit' field.

The screenshot shows the 'New Kit' form in the Estimating module. The 'Unit Type' dropdown is open, showing options like '#1', '#10', '#15', '#3/15"', '#3/18"', and '#5/18"'. The form includes fields for Item Name, Alternate Name, Takeoff Item, Assigned Branch, and a description editor. A table at the bottom has columns for ITEM NAME, TYPE, FACTOR, UNITS, INVERT, WASTE, UNIT COST, and EXTENDED COST.

5. Click 'Save'

- After ensuring all details are correctly entered, click the 'Save' button to add the new item estimate.

The screenshot shows the 'New Kit' form in the Aspire Care platform. The form is titled 'New Kit' and is currently 'Active'. It contains several input fields: 'Item Name' (Accolade Elm - Plant Installed 4'), 'Takeoff Item' (Select One), 'Alternate Name' (Accolade Elm - Plant Installed 4'), 'Assigned Branch' (All Branches), 'Category' (Plant - Shade Tree), 'Unit Type' (#1), and 'Description' (Paragraph). There are also checkboxes for 'Available to bid' (checked) and 'Force Single Unit Pricing' (unchecked). A 'Save' button is highlighted with a red box in the top right corner. The bottom of the form shows a table with columns: ITEM NAME, TYPE, FACTOR, UNITS, INVERT, WASTE, UNIT COST, and EXTENDED COST.

By following these steps, you can quickly and accurately add a new item estimate on the Aspire Care platform. This process helps streamline your estimating tasks and keeps your records precise. If you have any questions or encounter any issues, please refer to the Aspire Care support resources for further assistance.