

Refining Payment and Estimating Processes

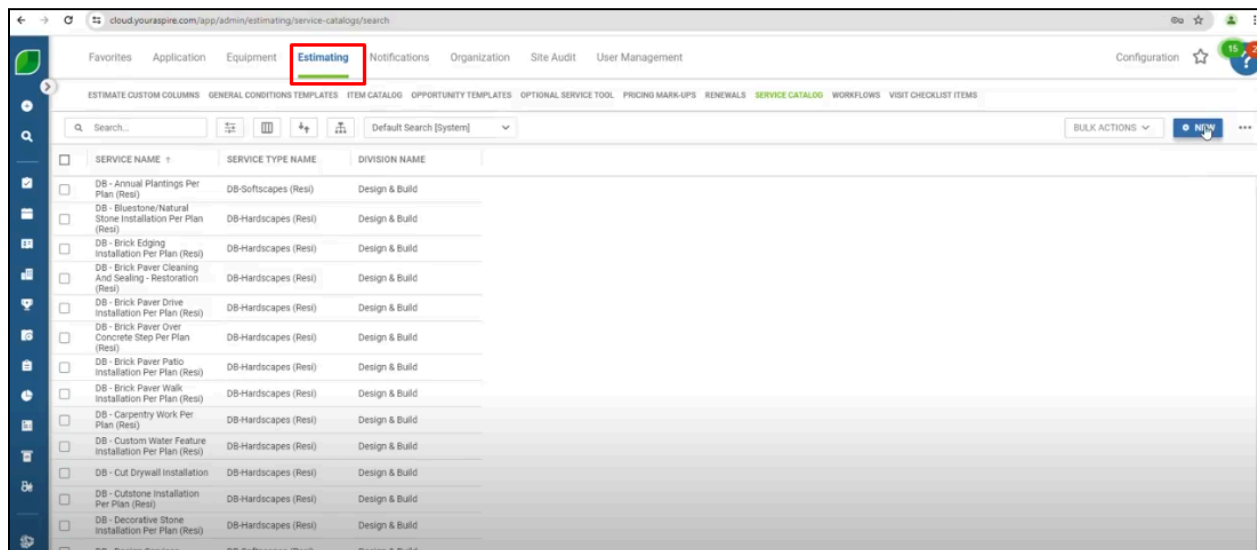
Effective payment management and accurate estimating are essential components of successful project execution. By ensuring that payments are processed efficiently and estimates are calculated precisely, we build a foundation of trust and reliability with our clients. This approach enables us to manage financial transactions smoothly, forecast costs accurately, and deliver projects that meet both expectations and budgets. Through our commitment to these practices, we support the overall success and sustainability of our projects.

This guide will walk you through the process of adding a new service in the Aspire platform's 'Estimating' section. Follow these straightforward steps to ensure your new service is correctly added.

Steps to Add a New Service

1. Go to 'Estimating'

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



2. Enter 'Service Name', 'Display Name', and 'Abbreviation'

- In the 'Service Name' field, enter the name of the new service you are adding.
- In the 'Display Name' field, enter how you want the service to appear in the system.
- In the 'Abbreviation' field, enter a short form of the service name.

The screenshot shows the 'New Service' configuration page. The 'Service Name' field is highlighted with a red box and contains 'DB - Annual Plantings Per Plan (Resl)'. The 'Display Name' field is also highlighted with a red box and contains 'Annual Plantings Per Plan'. The 'Abbreviation' field is highlighted with a red box and contains 'Annual Plantings Per'. The 'Service Type' dropdown menu is set to 'Design & Build | DB-Hardscapes (Builder)'. Other fields include 'Sort order' (0), 'Form' (Select One), 'Contract Service' (unchecked), 'Requires Approval' (unchecked), 'Multi-visit' (checked), 'Default Pay Code' (Select One), 'Worker's Comp Code' (Select One), and 'Minimum Charge' (\$0.00). A 'Description' text area is also present.

3. Select the 'Service Type'

- Choose the appropriate service type from the dropdown menu.

The screenshot shows the 'New Service' configuration page with the 'Service Type' dropdown menu open. The dropdown menu is highlighted with a red box and shows two options: 'Design & Build | DB-Hardscapes (Respl)' and 'Design & Build | DB-Hardscapes (Resl)'. The 'Design & Build | DB-Hardscapes (Resl)' option is selected. Other fields are the same as in the previous screenshot.

4. Click 'Save'

- After entering all the required information, click the 'Save' button to add the new service.

The screenshot shows the 'New Service' form in the Aspire software. The form is titled 'New Service' and is currently 'Active'. The form contains several input fields and checkboxes for service details. The 'Service Name' field is filled with 'DB - Annual Plantings Per Plan (Resl)'. The 'Display Name' field is filled with 'Annual Plantings Per Plan'. The 'Abbreviation' field is filled with 'Annual Plantings Per'. The 'Service Type' dropdown is set to 'Design & Build | DB-Softscapes (Resl)'. The 'Branch' dropdown is set to 'All Branches'. The 'Taxable Items' dropdown is set to 'Select taxable items'. The 'Minimum Charge' field is filled with '\$0.00'. The 'Sort order' field is filled with '0'. The 'Form' dropdown is set to 'Select One'. The 'Contract Service' checkbox is unchecked. The 'Requires Approval' checkbox is unchecked. The 'Multi-visit' checkbox is checked. The 'Default Pay Code' dropdown is set to 'Select One'. The 'Worker's Comp Code' dropdown is set to 'Select One'. A 'SAVE' button is highlighted in the top right corner of the form.

Adding services in the Aspire is a simple yet crucial step for maintaining accurate project estimations. By following the outlined steps, you ensure your service offerings are correctly integrated, leading to more precise forecasting and smoother project execution. This helps uphold the trust and reliability your clients expect.