

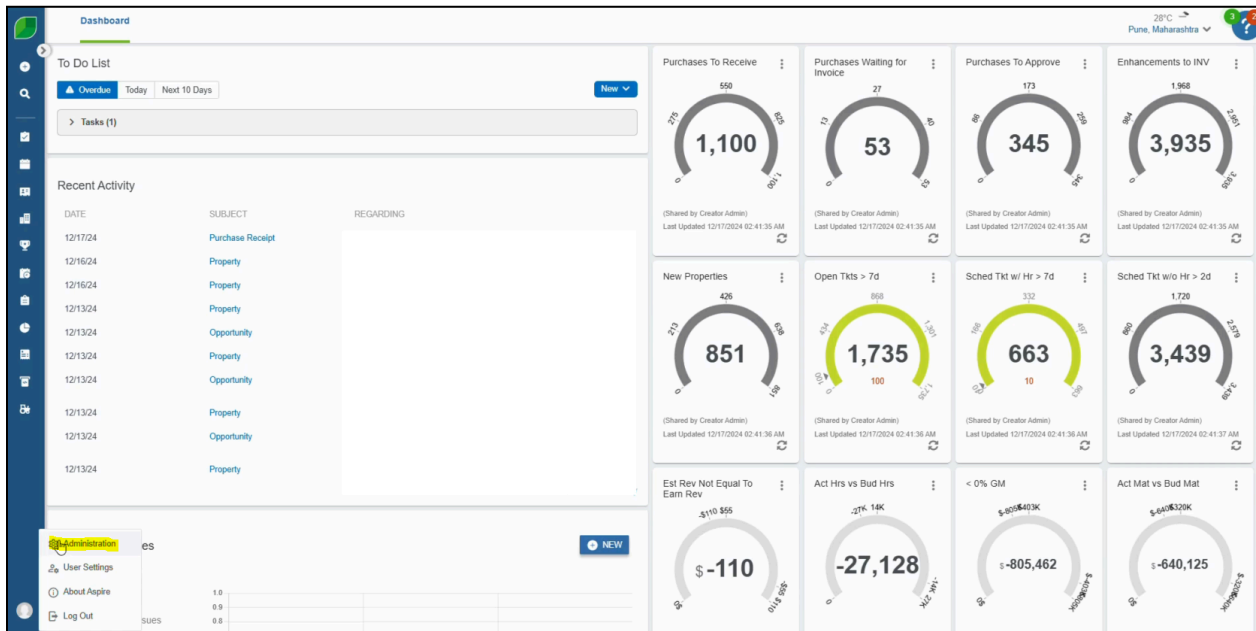
Unit Type Creation in Aspire

This job aid provides a step-by-step guide on creating unit types in Aspire, a crucial process for streamlining client-specific requirements and enhancing service management. By setting up unit types, users can efficiently add materials and services to estimates tailored to specific tasks, such as lawn care or other property services. This ensures accurate estimates, seamless billing, and effective tracking of services, contributing to better management of accounts receivable and overall client satisfaction.

Steps to Create a Unit Type

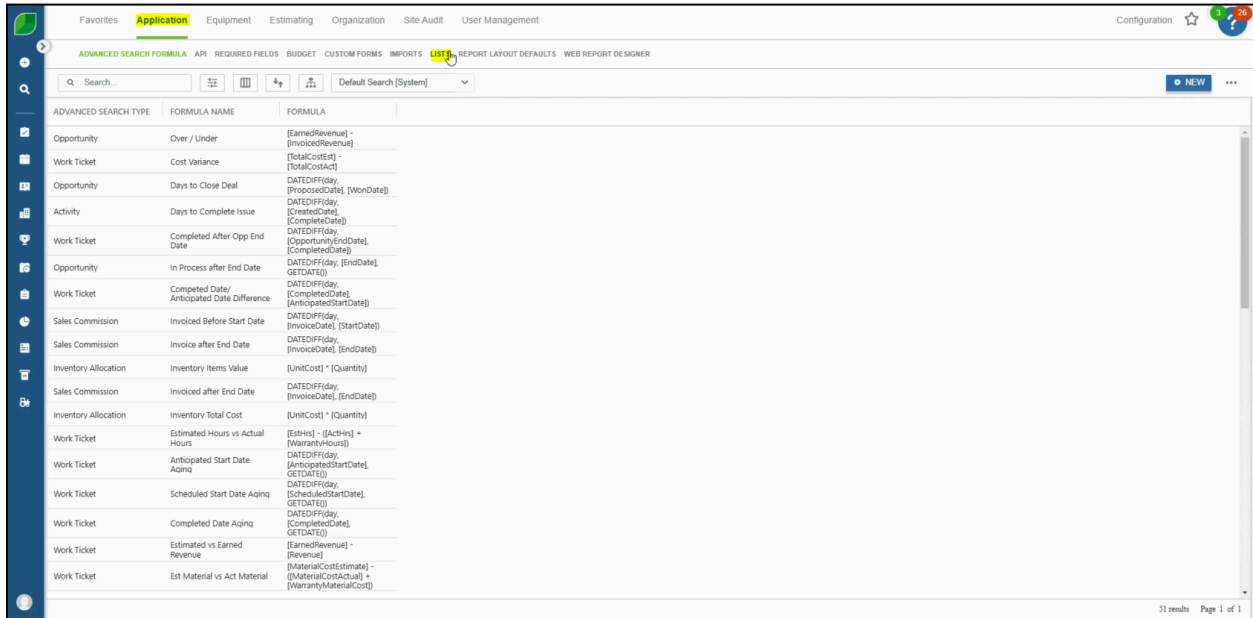
1. Click on Profile at the Bottom and Select Administration

Access the administration settings through your profile.



2. Go to Application Then Select List

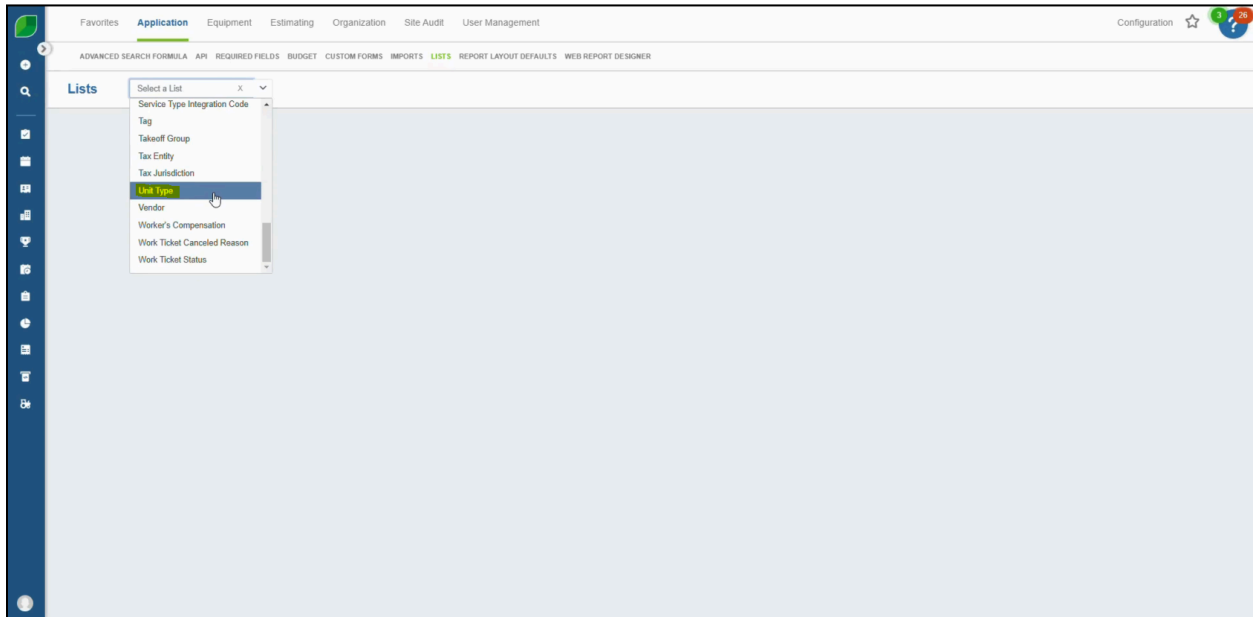
Navigate to the list section under the application menu.



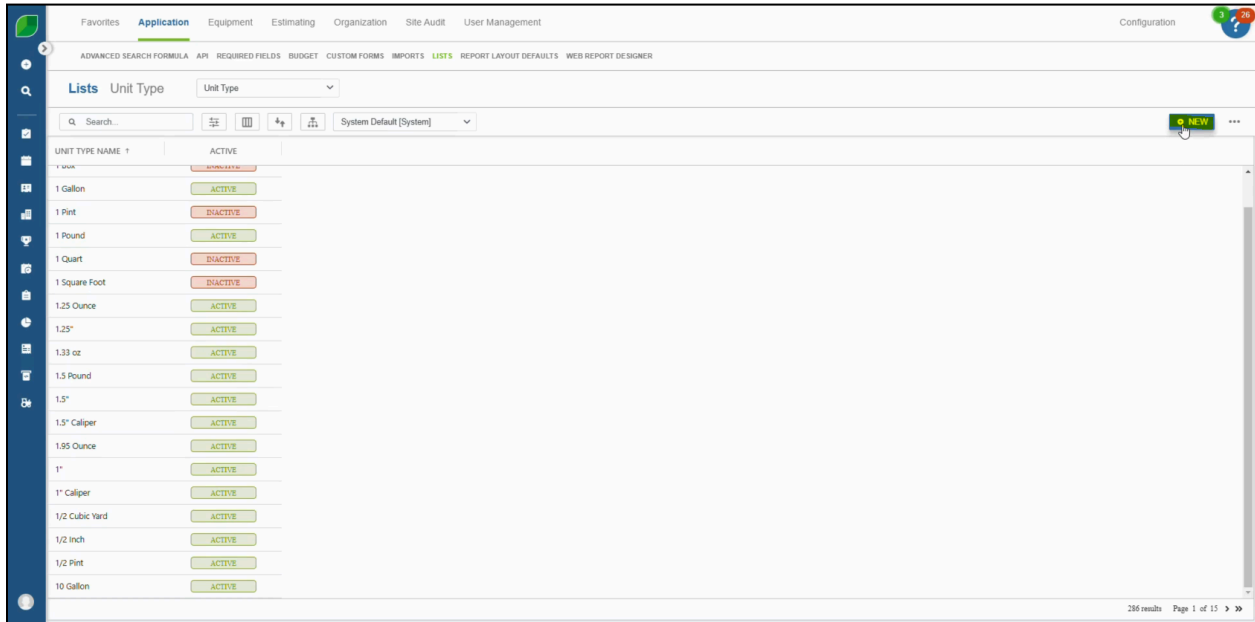
ADVANCED SEARCH TYPE	FORMULA NAME	FORMULA
Opportunity	Over / Under	[EarnedRevenue] - [InvoiceRevenue]
Work Ticket	Cost Variance	[TotalCostEst] - [TotalCostAct]
Opportunity	Days to Close Deal	DATEDIFF(day, [ProposedDate], [WonDate])
Activity	Days to Complete Issue	DATEDIFF(day, [CreatedDate], [CompleteDate])
Work Ticket	Completed After Opp End Date	DATEDIFF(day, [OpportunityEndDate], [CompletedDate])
Opportunity	In Process after End Date	DATEDIFF(day, [EndDate], GETDATE())
Work Ticket	Completed Date/ Anticipated Date Difference	DATEDIFF(day, [CompletedDate], [AnticipatedStartDate])
Sales Commission	Invoice Before Start Date	DATEDIFF(day, [InvoiceDate], [StartDate])
Sales Commission	Invoice after End Date	DATEDIFF(day, [InvoiceDate], [EndDate])
Inventory Allocation	Inventory Items Value	[UnitCost] * [Quantity]
Sales Commission	Invoice after End Date	DATEDIFF(day, [InvoiceDate], [EndDate])
Inventory Allocation	Inventory Total Cost	[UnitCost] * [Quantity]
Work Ticket	Estimated Hours vs Actual Hours	[EstHrs] - ([ActHrs] + [WarrantyHours])
Work Ticket	Anticipated Start Date Aqinq	DATEDIFF(day, [AnticipatedStartDate], GETDATE())
Work Ticket	Scheduled Start Date Aqinq	DATEDIFF(day, [ScheduledStartDate], GETDATE())
Work Ticket	Completed Date Aqinq	DATEDIFF(day, [CompletedDate], GETDATE())
Work Ticket	Estimated vs Earned Revenue	[EarnedRevenue] - [Revenue]
Work Ticket	Est Material vs Act Material	[MaterialCostEstimate] - ([MaterialCostActual] + [WarrantyMaterialCost])

3. Filter List to Unit Type

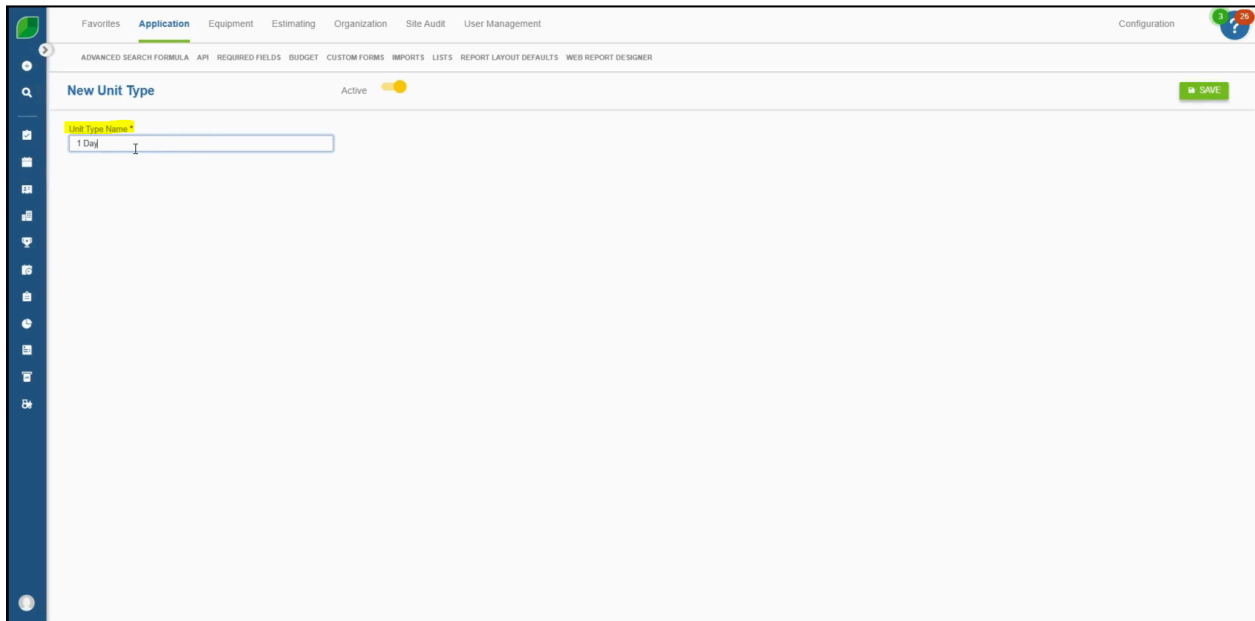
Use the filtering option to locate the unit type category.



4. **Click on New on Your Right**
Select the "New" button on the right-hand side of the screen.

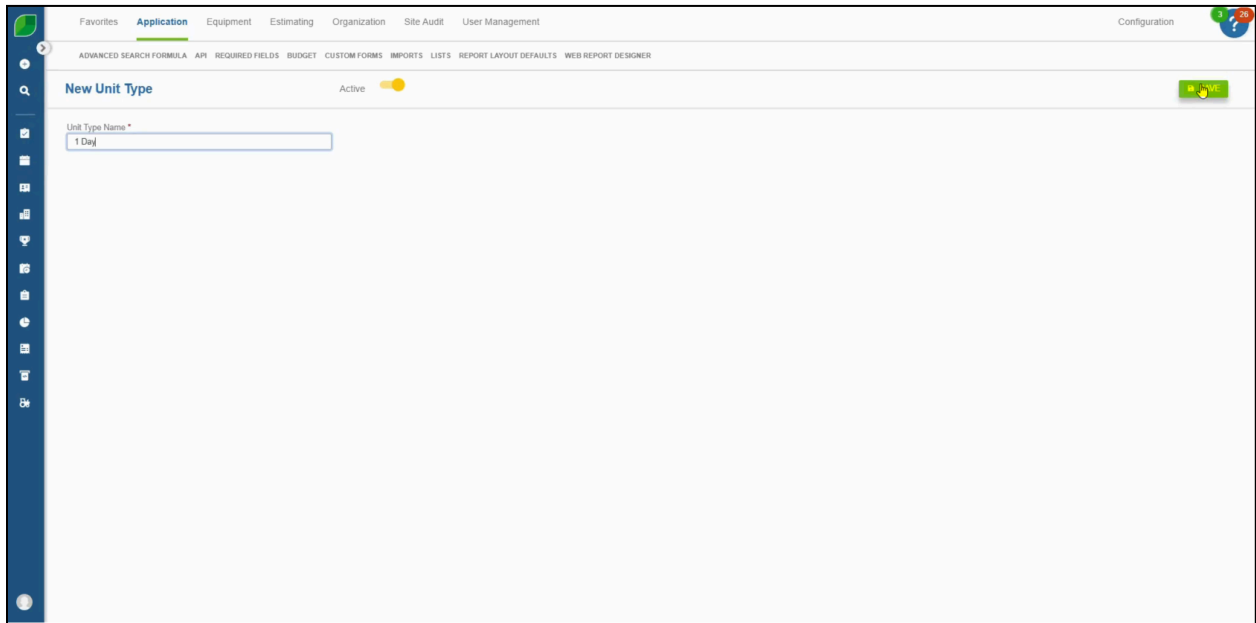


5. **Enter Unit Type Name**
Input the desired name for the unit type you are creating.



6. Click Save

Finalize the process by saving the new unit type.



The screenshot shows the 'New Unit Type' form in the Aspire software interface. The form is titled 'New Unit Type' and has an 'Active' toggle switch set to 'On'. The 'Unit Type Name' field contains the text '1 Day'. The interface includes a top navigation bar with tabs for 'Favorites', 'Application', 'Equipment', 'Estimating', 'Organization', 'Site Audit', and 'User Management'. A secondary navigation bar contains links for 'ADVANCED SEARCH FORMULA', 'API', 'REQUIRED FIELDS', 'BUDGET', 'CUSTOM FORMS', 'IMPORTS', 'LISTS', 'REPORT LAYOUT DEFAULTS', and 'WEB REPORT DESIGNER'. A vertical sidebar on the left contains various icons for navigation. The top right corner shows a 'Configuration' link and a user profile icon.

By following these simple steps, you can efficiently add unit types in Aspire, ensuring smooth estimation processes and better accounts receivable management. This feature helps streamline client-specific tasks, making property service management more effective and accurate.