

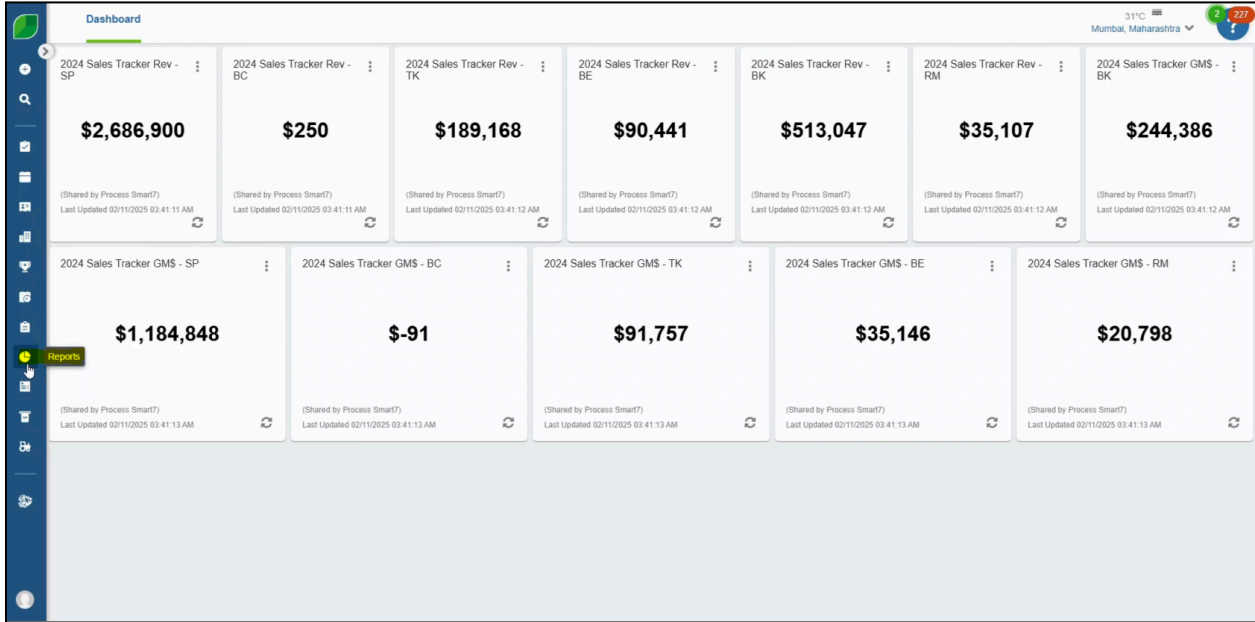
# Pivot Tables: How to Build Pivot Reports

Pivot tables help organize and analyze financial data efficiently. In Aspire, you can use pivot reports to track purchases and allocations in accounts receivable. This job aid provides step-by-step instructions to build a pivot report using the purchase pivot table.

## Steps to Build a Pivot Report

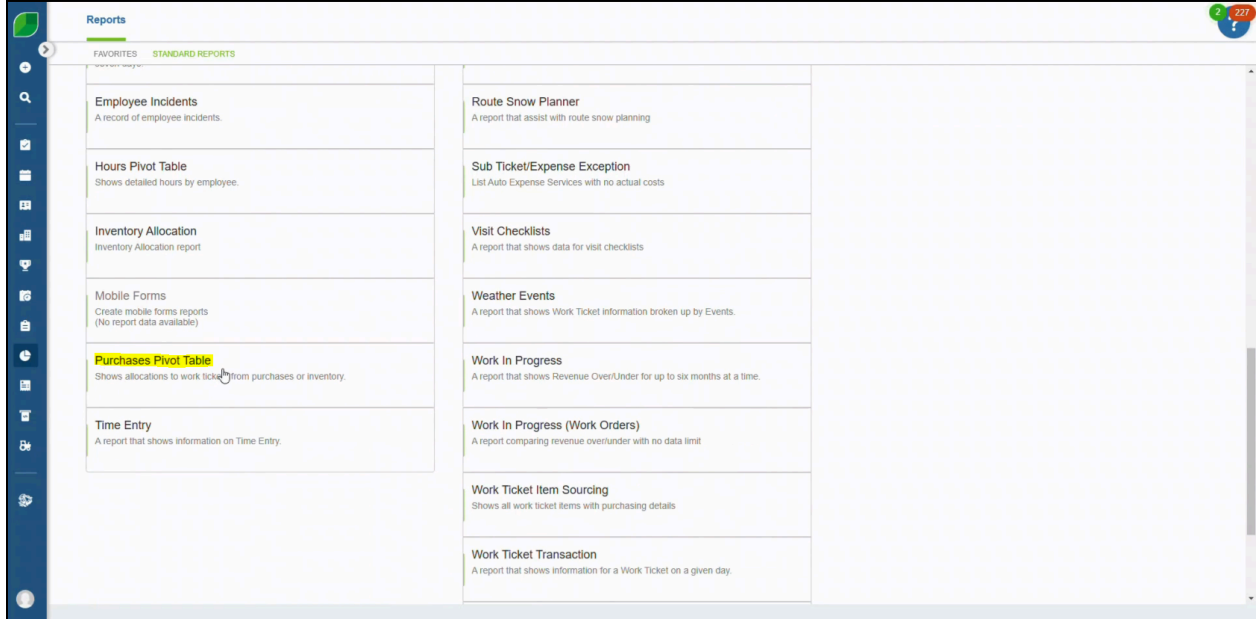
### 1. Go to Aspire Dashboard and Navigate to Reports

- Log in to Aspire and access the main dashboard.
- Locate the "Reports" section in the menu.



## 2. Select Standard Reports and Scroll Down to Purchase Pivot Table

- Click on the "Standard Reports" option.
- Scroll through the available reports and select "Purchase Pivot Table."



## 3. Click Above Additional Category and Select Show Field List

- In the pivot table interface, click the section above "Additional Category."
- Choose "Show Field List" to reveal available data fields.

The screenshot shows a pivot table interface titled 'Pivot Report | Purchases'. The table has columns for 'Division', 'Allocation Category', 'Allocation Quantity', 'Grand Total', and 'Allocation Total'. A dropdown menu is open above the 'Allocation Category' column, showing options for 'Refresh Data' and 'Show Field List'. The table contains various categories like 'Accent Fall', 'Aggregate', 'Annual', etc., with corresponding numerical values.

Division	Allocation Category	Allocation Quantity	Grand Total	Allocation Total
	Accent Fall	0.00		-\$94.45
	Aggregate	327.19		-\$107,800.23
	Annual	-78.00		-\$15,116.24
	Bulk	31.75		-\$82,933.54
	Chemicals	0.00		\$72.86
	Debris/Dump Fee	-53.00		-\$80,575.03
	Decorative Stone	0.00		-\$4,370.87
	Drainage	4,103.99		-\$14,543.66
	Fertilizer	85.27		-\$6,359.57
	Fire Feature	6.20		\$961.79
	Holiday	9,784.39		\$37,649.46
	Holiday Live	-206.00		\$691.41
	Irrigation	1,842.00		\$2,225.49
	Labor	-172.00		80.00
	Landscape Supply	4,295.11		-\$114,110.87
	Lighting	553.58		-\$3,321,103.98
	Misc	129.00		\$3,248.70
	Modular Block	7.92		\$128.89
	Natural Stone	1.59		\$1,019.11
	Other	2.00		\$31.47
	Paver	349.75		\$3,119.24
	PWC	16.00		\$491.07
	Plant - Deciduous Shrub	3.00		\$137.90
	Plant - Evergreen Shrub	3.00		\$158.76
	Plant - Evergreen Upright	1.00		\$174.01
	Plant - Tropicals	28.00		\$1,274.18
	Snow	13,949.53		\$448,570.86
	Turf	3,128.29		-\$546,597.73
	Waterfeature	0.00		80.00
<b>Total</b>		<b>38,239.56</b>		<b>-\$1,793,151.58</b>

## 4. Add Purchase Unit Type and Allocation Unit Type

- Find **Purchase Unit Type** and **Allocation Unit Type** in the field list.
- Drag these fields into the field list to include them in the report.

The screenshot shows a PivotTable in Microsoft Excel with the following data:

Allocation Category	Allocation Quantity	Grand Total	Allocation Total
Accent Fall	58,402.67	624.02	\$212,154.26
Accent Spring	624.02	5.00	\$2,840.20
Aggregate	21,005.16	21,005.16	\$70.65
Annual	109,238.42	28,478.95	\$276,496.40
Bulk	28,478.95	4,925.00	\$180,947.34
Chemicals	4,925.00	9,215.68	\$711,386.55
Coping	9,215.68	6,176.07	\$1,258.67
Debris/Dump Fee	6,176.07	1,422.33	\$336,873.86
Decorative Stone	1,422.33	18,956.11	\$89,910.95
Drainage	18,956.11	22.00	\$37,822.13
Equipment	22.00	2.00	\$87,526.38
Fees	2.00	5,298.26	\$4,880.61
Fertilizer	5,298.26	734.20	\$4,417.50
Fire Feature	734.20	12.00	\$82,884.03
Herbicide	12.00	42,076.50	\$26,011.46
Holiday	42,076.50	3,680.00	\$3,094.14
Holiday Live	3,680.00	8,388.77	\$72,531.63
Irrigation	8,388.77	17.00	\$41,677.72
Joint Sand	17.00	1.00	\$23,293.00
Kit	1.00	0.00	\$598.26
Labor	0.00	200.00	\$238.11
Labor Kit	200.00	86,612.55	\$0.00
Landscape Supply	86,612.55	5,417.83	\$94.96
Lighting	5,417.83	4,341.08	\$15,359.63
Misc	4,341.08	5,539.66	\$-3,034,945.95
Modular Block	5,539.66	9,136.43	\$111,825.49
Natural Stone	9,136.43	14,795.31	\$101,667.05
Other	14,795.31	119,650.96	\$333,591.57
Paver	119,650.96	2,226.23	\$157,037.59
PHC	2,226.23	2,486.00	\$937,914.77
Plant - Broadleaf Evergreen	2,486.00		\$2,549.80
			\$187,144.53

## 5. Expand Data Fields for Better Analysis

- Click on the added fields and select "Expand All."
- This action will display a more detailed breakdown of purchase data.

The screenshot shows the same PivotTable as above, but with 'Purchase Unit Type' and 'Allocation Unit Type' added to the filter fields. The 'Aggregate' row is expanded, and a context menu is open over it, showing 'Expand All' selected. A Field List dialog is also open, showing various date-based fields.

## 6. Add Divisions into the Field List

- Locate "Divisions" in the field selection panel.
- Click and drag "Divisions" into the field list area to organize data accordingly.

The screenshot shows the Pivot Report | Purchases interface. The pivot table has columns for Allocation Quantity, Grand Total, and Allocation Total. A 'Field List' dropdown menu is open, showing various fields including 'Divisions'. The table data includes categories like Accent Fall, Aggregate, Annual, Bulk, Chemicals, Debris/Dump Fee, and Decorative Stone, with their respective values and totals.

Allocation Category	Allocation Quantity	Grand Total	Allocation Total
Accent Fall	0.00		-\$94.45
Aggregate	327.19		-\$107,800.23
Annual	-78.00		-\$15,116.24
Bulk	31.75		-\$82,933.54
Chemicals	0.00		\$72.86
Debris/Dump Fee	-53.00		-\$80,575.03
Decorative Stone	0.00		-\$4,370.87
	4,103.99		-\$14,543.06
	85.27		-\$6,359.97
	6.20		\$961.79
	9,784.39		\$37,649.46
	-205.00		\$691.41
	1,942.00		\$2,225.49
	-172.00		\$0.00
	4,295.11		-\$114,110.87
	553.58		-\$3,321,103.98
	129.00		\$3,248.70
	7.92		\$128.09
	1.59		\$1,019.11
	2.00		\$31.47
	349.75		\$3,119.24
	16.00		\$491.07
	3.00		\$137.90
	3.00		\$158.76
	1.00		\$174.01
	28.00		\$1,274.18
	13,949.53		\$448,570.86
	3,128.29		-\$546,097.73
	0.00		\$0.00
	38,239.56		-\$3,793,151.58

## 7. Save and Export the Pivot Report

- Click on the save icon to store your customized pivot report.
- Select "Export to Excel" to download the report for further analysis or sharing.

The screenshot shows the Pivot Report | Purchases interface with a detailed pivot table. The table lists various items like PVC Coupler, Globe Valve, and Poly Coupler, along with their purchase and allocation unit types, branches, and costs. The 'Export to Excel' button is highlighted in the top right corner.

Allocation Name	Purchase Unit Type	Allocation Unit Type	Branch	Allocation Quantity	Grand Total	Allocation Unit Cost	Allocation Total
5" PVC Coupler	EA	EA		50.00	\$0.48		\$24.21
061224 ST 715 TK 368 Wheeling to CHDS				8.50	\$110.00		\$935.00
062824 ST 745 TK 470 Wheeling to CHDS				7.50	\$115.00		\$862.50
072624 ST 700 TK 511 Wheeling to CHDS				5.75	\$110.00		\$632.50
080124 ST 715 TK 368 Barlog yard to CHDS				8.75	\$110.00		\$962.50
081424 ST 645 TK 511 Barlog to CHDS				8.75	\$110.00		\$962.50
090524 ST 730 TK 410 Wheeling to CHDS				8.75	\$110.00		\$962.50
092724 ST 730 TK 368 Wheeling to CHDS				7.50	\$110.00		\$825.00
1 G 30 SECOND CLEANER				1.00	\$18.35		\$18.35
1" Globe Valve				1.00	\$17.23		\$17.23
1" Globe Valve Male x Barb w/ No Flow Control				5.00	\$17.23		\$86.13
1" Globe Valve Male x Barb w/ No Flow Control				4.00	\$17.23		\$68.92
1" Globe Valve NPT w/o FC				30.00	\$1.15		\$34.45
1" Insert Coupling (SNPK)				1.00	\$38.34		\$38.34
1" Insert Elbow				7.00	\$8.23		\$57.61
1" Insert Male Adapter				4.00	\$6.76		\$27.03
1" Insert Tee				8.00	\$5.69		\$45.52
1" Plastic Globe Valve				1.00	\$15.79		\$15.79
				5.00	\$0.91		\$4.56
1" Poly Coupler	EA	EA		50.00	\$0.67		\$33.26
				10.00	\$0.67		\$6.65
				65.00	\$2.24		\$144.47
1" Poly Coupler Fitting	EA	EA		10.00	\$0.91		\$9.13
				25.00	\$1.40		\$35.06
				75.00	\$1.09		\$81.64
				100.00	\$2.49		\$249.00
1" Poly Tee	EA	EA		25.00	\$1.84		\$45.91
1" PVC Coupler	EA	EA		3.00	\$0.70		\$2.09
				25.00	\$1.62		\$40.51
1" PVC Elbow (90)	EA	EA		2.00	\$0.71		\$1.41

## 8. Review all the details of the Pivot Table in the reference Excel sheet.

	B	C	D	E	F	G	H	J	K	L	M	N	
	Item	Size	Size	Branch	Allocation Quantiti	Allocation Unit Co	Allocation Toti	Catalog Cost	EST Cos	Average of Allocation Per Unit C	Price Differenc	Variance	Material Category
2	Boulder - New York Fieldstone	Ton	Ton		0.16	\$443.35	\$71.26	385	443.38	60.38	16%	Material	
3	Integral-6" 10W Led 2700K Po Wdercoated Brz-116225500200	EA	EA		3.00	\$74.83	\$224.50	83.17	74.83	-8.34	-10%	Material	
5	Lighting - 14G Wire - 250' Box	EA	EA		1.00	\$83.51	\$83.51	107.24	83.51	-23.73	-22%	Material	
6	Lighting 300W Transformer - Unique	EA	EA		1.00	\$272.43	\$272.43	306.66	272.43	-34.23	-11%	Material	
8	Permit Fee (EA)	EA	EA		1.00	\$2,150.00	\$2,150.00	632.5	2150.00	1517.50	100%	Other	
9	Salt Bag Treated (50 LB)	EA	EA		980.00	\$6.50	\$6,370.00	11	6.50	-4.50	-41%	Material	
10	Salt Bulk	Ton	Ton		160.63	\$93.88	\$15,079.17	84.7	93.88	9.18	11%	Material	
11	Salt Bulk	Ton	Ton		22.74	\$91.88	\$2,089.24	84.7	91.88	7.18	8%	Material	
12	Salt Bulk	Ton	Ton		93.56	\$91.13	\$8,525.66	84.7	91.13	6.43	8%	Material	
13	Subcontractor	Dollars	Dollars		5,308.00	\$47.38	\$5,465.12	1	1.03	0.03	3%	Sub	
14	Subcontractor	Dollars	Dollars		4,904.99	\$79.31	\$5,050.44	1	1.03	0.03	3%	Sub	
15	Subcontractor	Dollars	Dollars		736.00	\$2.00	\$736.00	1	1.00	0.00	0%	Sub	
16	Subcontractor	Dollars	Dollars		634.66	\$4.12	\$653.45	1	1.00	0.03	3%	Sub	

Pivot reports in Aspire allow for better financial tracking and data analysis. By following these steps, you can create, customize, and export purchase pivot tables to manage accounts receivable more effectively.