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.

	Dashboard										31°C [₩] Mumbal, Maharashtra ∨
•	2024 Sales Tracker Rev - 2024 Sales Tracker Rev - BC			2024 Sales Tracker Rev - TK		2024 Sales Tracker Rev - # BE		4 Sales Tracker Rev -	2024 Sales Tracker Rev - #		2024 Sales Tracker GM\$ - BK
۹ 	\$2 686 900	686 900 \$250		\$199 169		\$90.441		\$513 047	\$35 107		\$244 386
2	\$2,000,000		,200	\$100,100		400, 441		¢010,011	\$00,101		4211,000
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۵ ي	2024 Sales Tracker GM\$ - SP	:	2024 Sales Tracker	GM\$ - BC	2024	4 Sales Tracker GM\$ - TK	:	2024 Sales Tracker GM\$ -	BE :	2024 Sales	Tracker GM\$ - RM
63											
ê	\$1,184,848			\$-91		\$91,757		\$35,14	46		\$20,798
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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."

	Reports		2 27
•	FAVORITES STANDARD REPORTS		
۹ —	Employee Incidents A record of employee incidents.	Route Snow Planner A report that assist with route snow planning	
=	Hours Pivot Table Shows detailed hours by employee.	Sub Ticket/Expense Exception List Auto Expense Services with no actual costs	
F33	Inventory Allocation Inventory Allocation report	Visit Checklists A report that shows data for visit checklists	
9 31 6	Mobile Forms Create mobile forms reports (No report data available)	Weather Events A report that shows Work Ticket information broken up by Events.	
•	Purchases Pivot Table Shows allocations to work tick from purchases or inventory.	Work In Progress A report that shows Revenue Over/Under for up to six months at a time.	
च 8#	Time Entry A report that shows information on Time Entry.	Work In Progress (Work Orders) A report comparing revenue overnunder with no data limit	
\$		Work Ticket Item Sourcing Shows all work ticket items with purchasing details	
		Work Ticket Transaction A report that shows information for a Work Ticket on a given day.	
0			•

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.

Pivot Report Purchases		Default View) 🖬 🕻		
Page 1 of 3 (202 items) < [1] 2 3 >						
Drop Filter Fields Here						
Allocation Quantity Allocation Total		Drop Column F	ields Here			
	Reload Data		Grand Total			
Division	Allocation Categon Show Field List	Δ -	Allocation Quantity	Allocation Total		
	Accent Fall		0.00	-\$94.4		
	Aggregate		327.19	-\$107,800.2		
	Annual		-78.00	-\$15,116.2		
	Bulk		31.75	-\$82,933.5		
	Chemicals		0.00	\$72.8		
	Debris/Dump Fee		-53.00	-\$80,575.0		
	Decorative Stone		0.00	-\$4,370.8		
	Drainage		4,103.99	-\$14,543.0		
	Fertilizer		85.27	-\$6,359.		
	Fire Feature		6.20	\$961.		
	Holiday		9,784.39	\$37,649.		
	Holiday Live		-206.00	\$691.		
	Irrigation		1,942.00	\$2,225.		
	Labor		-172.00	\$0.		
	Landscape Supply		4,295.11	-\$114,110.		
	Lighting		553.58	-\$3,321,103.		
	Misc		129.00	\$3,248.		
	Modular Block		7.92	\$128.		
	Natural Stone		1.59	\$1,019.		
	Other		2.00	\$31.		
	Paver		349.75	\$3,119		
	PHC		16.00	\$491.		
	Plant - Deciduous Shrub		3.00	\$137.		
	Plant - Evergreen Shrub		3.00	\$158.		
	Plant - Evergreen Upright		1.00	\$174.		
	Plant - Tropicals		28.00	\$1,274.:		
	Snow		13,949.53			
	Turf		3,128.29			
	Waterfeature		0.00	\$0.		
otal			38,239.56	-\$3,793,151.5		

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.

Pivot Report Purchases		Default Vier	И	
Drop Filter Fields Here				
Allocation Quantity Allocation Total		Dr	op Column Fields Here	
diamatica Calendaria			Grand Total	
Allocation Category		Δ	Allocation Quantity	Allocation Total
			58,402.67	\$212,154.2
Accent Fall			624.02	\$2,840.2
Accent Spring			5.00	\$70.6
Aggregate			21,005.16	\$276,496.4
Annual			109,238.42	\$180,947.3
Bulk			28,478.95	\$711,386.5
Chemicals			4,925.00	\$1,358.6
Coping			9,215.68	\$336,873.8
Debris/Dump Fee			8,176.07	\$89,910.9
Decorative Stone	Field List		1,422.33	\$37,822.1
Drainage	Allocation Received To	•	18,956.11	\$87,526.3
Equipment			22.00	\$4,880.6
Fees	Allocation Service		2.00	\$4,417.5
Fertilizer	Allocation Service Display		5,298.26	\$82,884.0
Fire Feature	Allocation Service Type		734.20	\$26,011.4
Herbicide	Allocation Type		12.00	\$3,094.1
Holiday	Allocation Unit Cost		42,076.50	\$72,531.6
Holiday Live	Allowing 1979 Terrs		3,680.00	\$41,677.3
Irrigation	Milocation of the type		8,388.77	\$23,293.0
Joint Sand	Branch		17.00	\$598.
Kit	Created By		1.00	\$238.1
Labor	Created Date	· · · · · · · · · · · · · · · · · · ·	0.00	\$0.0
Labor Kit			200.00	\$94.5
Landscape Supply			86,612.55	\$15,359.6
Lighting			5,417.83	-\$3,034,945.5
Misc			4,341.08	\$111,825.4
Modular Block			5,539.66	\$101,667.0
Natural Stone			9,136.43	\$333,591.5
Other			14,795.31	\$157,937.5
Paver			119,650.96	\$937,914.3
PHC			2,226.23	\$2,549.8
Plant - Broadleaf Evergreen			2,486.00	\$187,144.5

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.

Pivot Report Purchases		Default View		•)	8
Drop Hiter Helds Here					
Allocation Quantity Allocation Total			Drop Co	lumn Fields Here	
Allocation Category	△	Allocation Unit Type	Δ	Grand Total	
				Allocation Quantity	Allocation Total
				58,402.67	\$212,154.2
Accent Fall				624.02	\$2,840.2
Accent Spring				5.00	\$70.6
Aggregate	Evened			21,005.16	\$276,496.4
3 Annual	Expans			109,238.42	\$180,947.3
🗄 Bulk	Expand All M			28,478.95	\$711,386.5
Chemicals	Collapse All			4,925.00	\$1,358.6
Coping				9,215.68	\$336,873.8
Debris/Dump Fee	East 1 Let			8,176.07	\$89,910.9
Decorative Stone	THEY LOA			1,422.33	\$37,822.1
Drainage	Accounting Period (Allocation Date)			18,956.11	\$87,526.3
Equipment	Accounting Period (Received Date)			22.00	\$4,880.6
E Fees	Accounting Period (Vendor Invoice Date)			2.00	\$4,417.5
E Fertilizer	Allocated Date			5,296.26	\$82,884.0
E Fire Feature	Allocated Date Month			734.20	\$26,011.4
∋ Herbicide				12.00	\$3,094.1
Holiday	Allocated Date Week			42,076.50	\$72,531.6
D Holiday Live	Allocated Date Year			3,680.00	\$41,677.7
Imigation	Allocation Inventory Location			8,388.77	\$23,293.0
D Joint Sand	Allocation Name			17.00	\$598.2
∋ Kit	Allocation Opportunity #			1.00	\$238.1
E Labor	Allocation Constructive Time	*		0.00	\$0.0
E Labor Kit				200.00	\$94.9
Landscape Supply				86,612.55	\$15,359.6
e Lighting				5,417.83	-\$3,034,945.9
2 MISC				4,341.08	\$111,825.4
Modular Block				5,539.66	\$101,667.0
e Natural Stone				9,136.43	\$333,591.5
o Outer				14,/95.31	\$157,937.5
e vaver				119,650.96	\$937,914.7
Direct Develop Develop				2,226.23	\$2,549.8
Plant - Broadleat Evergreen				2,486.00	\$187,144.5

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.

Pivot Report Purchases	Default View		🔒 🐔
Page 1 of 3 (202 items) < [1] 2 3 >			
Drop Filter Fields Here			
Allocation Quantity Allocation Total		Drop Column Fields Here	
		Grand Total	
Division (Im)	Allocation Category	Allocation Quantity	Allocation Total
Ŭ	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
	Field List X	4,103.99	-\$14,543.00
	Accounting Period (Allocation Date)	85.27	-\$6,359.97
	Accounting Period (Perskard Date)	6.20	\$961.79
	Accounting Period (Received Date)	9,784.39	\$37,649.46
	Accounting Period (Vendor Invoice Date)	-206.00	\$691.41
	Allocated Date	1,942.00	\$2,225.49
	Allocated Date Month	-172.00	\$0.00
	Allocated Date Week	4,295.11	-\$114,110.8
	Allocated Date Year	553.58	-\$3,321,103.96
	Allocation Inventory Location	129.00	\$3,240.70
	Allection Name	7.92	\$120.03
		3.00	\$21.42
	Allocation Opportunity #	240.75	\$2 110 2c
	Allocation Conortunity Type	16.00	\$401.07
	Plant - Deciduous Shruh	3.00	\$137.90
	Plant - Eventreen 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	-\$546,097.73
	Waterfeature	0.00	\$0.00
iotal		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.

Pivot Report Purchases		Purchase Price				×)					
							Save				
Dana 1 of 52 (5280 James) [[1] 2 2 4 5 6 7 51 52 52 5	ae 1 of \$1 (520 tem) □ [1] 2 3 4 5 6 7 = 31 52 33 □										
Accounting Period (Vender Invoice Date) 🐑 Molocation Category 🚬 Accounting Period (Raceived Date) 🐑 Wender Invoice Date 📼											
# Data Haders Drop Column Fields Here											
Allocation Name	Durchase Linit Type	Allocation Unit Type	Branch			Grand Total					
					Allocation Quantity	Allocation Unit Cost	Allocation Total				
.5" PVC Coupler	🖂 EA	I EA			50.00	\$0.48	\$24.3				
061224 ST 715 TK 368 WHeeling to CHDS					8.50	\$110.00	\$935.0				
062824 ST 745 TK 470 Wheeling to CHDS	8	Θ			7.50	\$115.00	\$862.5				
072624 ST 700 TK 511 Wheeling to CHDS					5.75	\$110.00	\$632.5				
080124 ST 715 TK 368 Bertog yard to CHDS	8	8			8.75	\$110.00	\$962.5				
081424 ST 645 TK 511 Bertog to CHDS	Θ	8			8.75	\$110.00	\$962.5				
090524 ST 730 TK 410 Wheeling to CHDS	8	8			8.75	\$110.00	\$962.5				
092724 ST 730 TK 368 Wheeling to CHDS	0	8			7.50	\$110.00	\$825.0				
1 G 30 SECOND CLEANER	8				1.00	\$18.35	\$18.3				
1" Globe Valve	0	8			1.00	\$17.23	\$17.3				
1" Globe Valve Male x Barb w/ No Flow Control	8	Θ			5.00	\$17.23	\$86.1				
1" Glove Valve Male x Barb w/ No Flow Control	8	Θ			4.00	\$17.23	\$68.9				
1" Glove Valve NPT w/o FC	8	8			30.00	\$1.15	\$34.4				
1" Insert Coupling (50PK)	8	8			1.00	\$38.34	\$38.3				
1" Insert Elbow	8	8			7.00	\$6.23	\$12.3				
1" Insert Male Adapter	8	8			4.00	\$0.76	\$3.0				
⊖ 1" Insert Tee	8				8.00	\$5.69	\$22.3				
1" Plastic Globe Valve	8	8			1.00	\$15.79	\$15.3				
					5.00	\$0.91	\$4.5				
a station works		🖂 EA			50.00	\$0.67	\$33.3				
E 1 Poly Coupler	L EA				10.00	\$0.67	\$6.6				
		EA Total			65.00	\$2.24	\$44.4				
1" Poly Coupler Fitting	I EA	I EA			10.00	\$0.91	\$9.1				
					25.00	\$1.40	\$35.0				
I" Poly Elbow (90)	e EA	e ea			75.00	\$1.09	\$35.6				
		EA Total			100.00	\$2.49	\$70.3				
I" Poly Tee	I EA	© EA			25.00	\$1.84	\$45.9				
G 1" PVC Coupler	I EA	© EA			3.00	\$0.70	\$2.0				
					25.00	\$1.62	\$40.5				
I 1" PVC Fibow (90)	I FA	⊖ EA			2.00	\$0.71	\$1.4				

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

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A 8	с	D	E	F	G	н	J	к	L	M	N
1 Item	* Size *	Size - Bra	nch 💌	Allocation Quantit *	Allocation Unit Co 👻	Allocation Tota 👻	Catalog Cost(EST Co	Average of Allocation Per Unit C *	Price Differenc *	Variance9_T	Material Categor - Pur
2 Boulder - New York Fieldstone	Ton	Ton		0.16	\$445.35	\$71.26	385	445.38	60.38	16%	Material
3 Integral-6" 10W Led 2700K Po Wdercoated Brz-II6225500200	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	24054	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	1.03	0.03	3%	Sub
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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.