

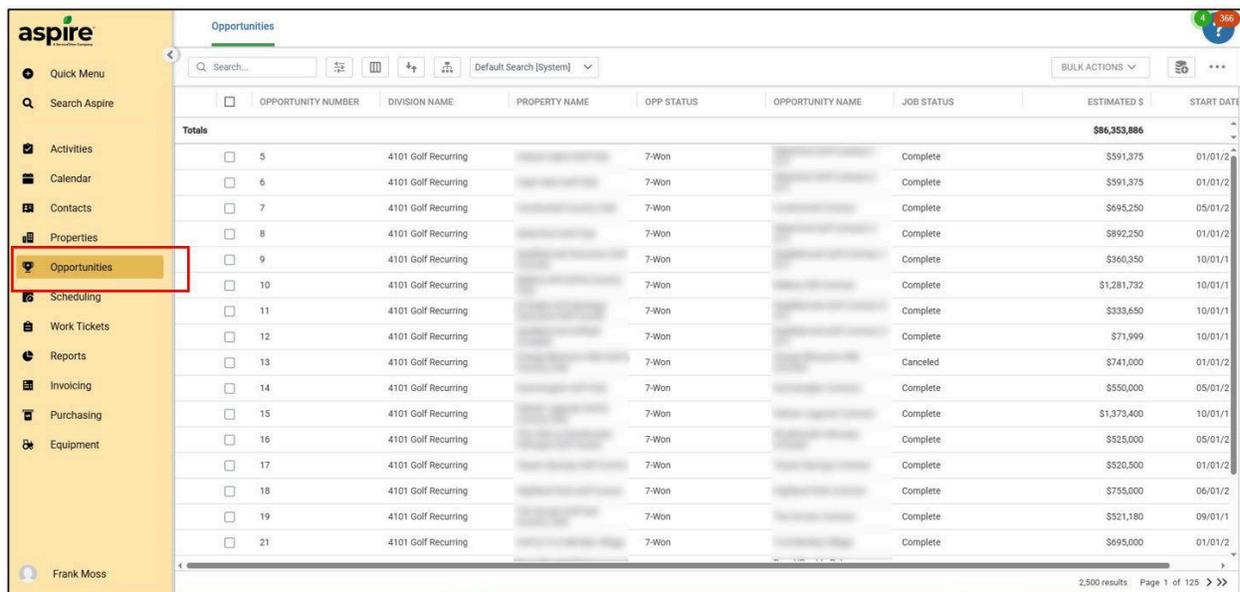
Creating an Opportunity Template in Aspire

This job aid provides a simple, step-by-step guide to help users create an Opportunity Template in Aspire. Opportunity Templates streamline the estimating process for recurring or similar job types by standardizing labor rates, materials, and travel time. They also enhance consistency across proposals and save valuable time by eliminating the need to build estimates from scratch.

Steps to Create an Opportunity Template in Aspire

1. Go to Opportunities

- Navigate to the Opportunities.



	OPPORTUNITY NUMBER	DIVISION NAME	PROPERTY NAME	OPP STATUS	JOB STATUS	ESTIMATED \$	START DATE
Totals						\$86,353,886	
<input type="checkbox"/>	5	4101 Golf Recurring		7-Won	Complete	\$591,375	01/01/2
<input type="checkbox"/>	6	4101 Golf Recurring		7-Won	Complete	\$591,375	01/01/2
<input type="checkbox"/>	7	4101 Golf Recurring		7-Won	Complete	\$695,250	05/01/2
<input type="checkbox"/>	8	4101 Golf Recurring		7-Won	Complete	\$892,250	01/01/2
<input type="checkbox"/>	9	4101 Golf Recurring		7-Won	Complete	\$360,350	10/01/1
<input type="checkbox"/>	10	4101 Golf Recurring		7-Won	Complete	\$1,281,732	10/01/1
<input type="checkbox"/>	11	4101 Golf Recurring		7-Won	Complete	\$333,650	10/01/1
<input type="checkbox"/>	12	4101 Golf Recurring		7-Won	Complete	\$71,999	10/01/1
<input type="checkbox"/>	13	4101 Golf Recurring		7-Won	Canceled	\$741,600	01/01/2
<input type="checkbox"/>	14	4101 Golf Recurring		7-Won	Complete	\$550,000	05/01/2
<input type="checkbox"/>	15	4101 Golf Recurring		7-Won	Complete	\$1,373,400	10/01/1
<input type="checkbox"/>	16	4101 Golf Recurring		7-Won	Complete	\$525,000	05/01/2
<input type="checkbox"/>	17	4101 Golf Recurring		7-Won	Complete	\$520,500	01/01/2
<input type="checkbox"/>	18	4101 Golf Recurring		7-Won	Complete	\$755,000	06/01/2
<input type="checkbox"/>	19	4101 Golf Recurring		7-Won	Complete	\$521,180	09/01/1
<input type="checkbox"/>	21	4101 Golf Recurring		7-Won	Complete	\$695,000	01/01/2

2. Select the Source Opportunity

- Search for and open the opportunity you want to use as a template.

	OPPORTUNITY NUMBER	DIVISION NAME	PROPERTY NAME	OPP STATUS	OPPORTUNITY NAME	JOB STATUS	ESTIMATED \$	START DATE
Totals							\$11,300,761	
<input type="checkbox"/>	64	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	65	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	66	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	67	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	68	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	69	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	70	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	71	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	72	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	73	4101 Golf		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	106	4601 Construction		8-Lost			\$1,510	09/01/20
<input type="checkbox"/>	110	4601 Construction		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	111	4601 Construction		7-Won		Canceled	\$0	01/01/20
<input type="checkbox"/>	116	4601 Construction		8-Lost	Test for Item Display		\$0	09/01/20
<input type="checkbox"/>	220	4101 Lawncare Recurring		8-Lost	test		\$2,824	
<input type="checkbox"/>	244	4601 Construction		8-Lost	Item Test		\$1,346	
<input type="checkbox"/>	248	4200 Golf Enhancement		7-Won		Canceled	\$0	10/01/20

3. Open the Options Menu and Save as Template

- Click the three-dot menu in the upper-left corner of the screen.
- Select Save as Template from the dropdown options.

Opportunity Name * test

Due Date

Lead Source Select One

Sales Rep *

Anticipated Close Date

Probability % 0%

Division *

Start Date 4/6/2025

Sales Type New Sale

Ops Manager Select One

End Date 5/6/2025

Invoice Type Fixed Price on Completion

Template

Property Name

Budget \$ \$0.00

Estimated \$ \$2,824.11

Status * 8-Lost

Tags

Additional Users Select One

Attachments

UPLOAD OR Drop Files VIEW ALL (0)

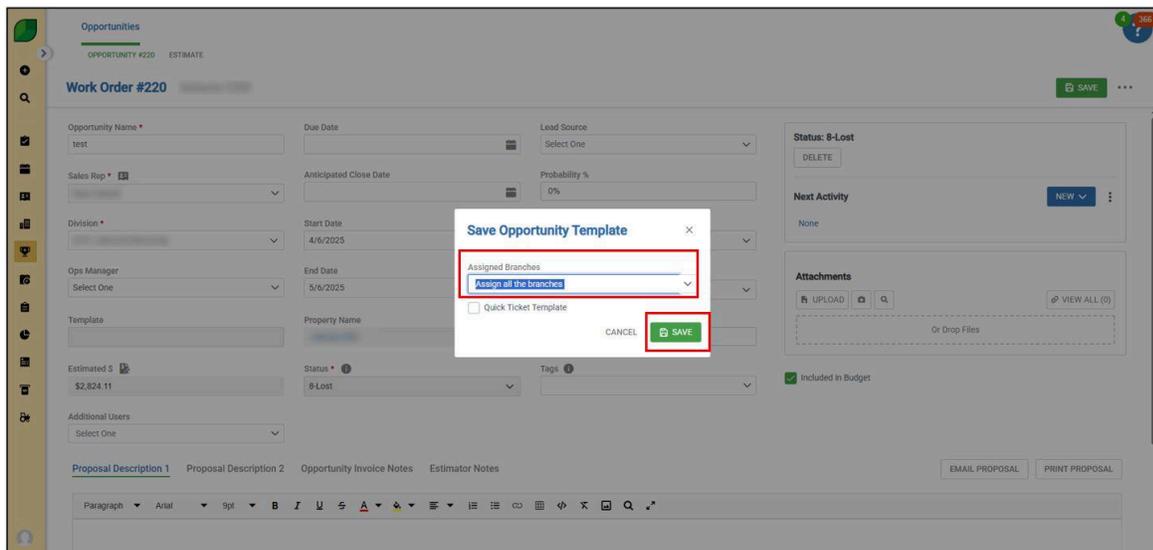
Included in Budget

Print Proposal
Email Proposal
Copy
Delete Opportunity
Save as Template

EMAIL PROPOSAL PRINT PROPOSAL

4. Assign Template Access by Branch & Save the Template

- In the Save Opportunity Template screen, choose the branches that should have access to this template.
- For Work Order templates, optionally check the Quick Ticket Template box if applicable. This option is not available for Contract opportunities.
- Click Save to complete the process.
- The template will automatically adopt the name of the original opportunity. If needed, you can rename it later under the Administration settings.



The screenshot displays the 'Save Opportunity Template' dialog box overlaid on a software interface. The dialog box is titled 'Save Opportunity Template' and features a close button (X) in the top right corner. It contains a dropdown menu for 'Assigned Branches' with the option 'Assign all the branches' selected. Below this is a checkbox for 'Quick Ticket Template' which is currently unchecked. At the bottom of the dialog are 'CANCEL' and 'SAVE' buttons. The background shows a form for 'Work Order #220' with various fields like Opportunity Name, Sales Rep, Division, etc.

By following these simple steps, you can create Opportunity Templates that promote consistency, accuracy, and efficiency in your estimating workflow. Templates are a smart way to save time and improve proposal quality across your organization.