

Aspire Annual System Cleanup

Purpose Statement: Keeping data in your Aspire system clean and up to date is critical for system functionality. Consider the following suggestions for developing your own system cleanup SOP.

Typical Roles: System Admin / Branch Admin / Branch Manager / Executive

Contacts:

1. Identify and remove duplicate data records
2. Ensure all fields are filled out properly
 - a. Contact Type
 - b. Contact info (phone, email, address)
 - c. Company
 - d. Contact Tags
 - e. Custom Fields
 - f. Other fields as required by your SOPs

Company:

1. Identify and remove duplicate data records
2. Correct Contacts assigned
3. Correct Properties assigned

Property:

1. Identify and remove duplicate data records
2. Verify Takeoff information
3. Create list to only display In Process Opportunities
4. Ensure all fields are filled out properly
 - a. Property Status
 - b. Correct Account Owner assigned
 - c. Correct Primary Contact assigned
 - d. Correct Billing Contact assigned
 - e. Property Tags
 - f. Custom Fields
 - g. Other fields as required by your SOPs

Activities:

1. Review Open Issues
2. Review Open Tasks

Manage Users and Roles:

1. Review Role assignments and permissions
2. Ensure access to new functionality
3. Review active devices, ensure terminated employee's devices are inactive.

Sales Opportunity Pipeline:

1. Review opportunities in pipeline
 - a. Consider losing opportunities over 90 days old with no activity
 - b. Update Probability Percentage
 - c. Create next activity for follow up
 - d. Review and Update Due Dates
 - e. Review and Update Anticipated Close Dates
2. Update Lead Source
3. Opportunity Tags

Crew Communication:

1. Update Operation Notes
 - a. Property
 - b. Service on Estimate
 - c. Work Ticket
2. Update Attachments
 - a. Property
 - b. Opportunity
 - c. Work Ticket

Invoicing:

1. Ensure Property fields are filled out properly
 - a. Tax Jurisdiction
 - b. Payment Terms
 - c. Separate Invoices
 - d. Paperless Invoices
 - e. Billing Contact
 - f. Custom Fields
2. Review unapplied payments and credits

Service Catalog:

1. Identify and remove duplicate data records
2. Consider simplifying Services where applicable
3. Review and update Service setup where applicable

Item Catalog:

1. Identify and remove duplicate data records

2. Review and update item costs
 - a. Update Cost Based on Average
 - b. Inventory Items – Use Add Inventory Cost to update (do not change Purchase Unit Cost on item)
3. Review and simplify Item Category and ensure they are assigned appropriately
4. Review and update Item setup where applicable

Manage Lists:

1. Review and cleanup options in each list