


Adding New Branch in Aspire Checklist

Adding a branch to your business is an exciting growth milestone! Below is a checklist you can use to make sure you are set-up for success with your new branch in Aspire.

Note: Pick a specific date at the first of a month or at the beginning of a season to add the new branch. This will make the transition as smooth as possible, especially for reporting purposes.

- 1. **Establish Branch** – Go to Administration → Organization Section → Manage Branches to set-up the new Branch. Fill in as much data as you can. You will need to save and come back to this area after setting up additional items in later steps of this checklist.
- 2. **Establish Associated Internal Property** – From the *Property Search List* screen, create a new internal property for the branch. You will need to tie this to the branch back in the set-up area from step 1.
- 3. **Establish Contract for Logging Internal Time** – Under the newly established internal property, create and win a new contract opportunity in the overhead division that will hold the internal tickets for the branch.
- 4. **Set up User Branch Access and Associations** – Go into the *Contact Search List* and the *User Search List* for employees who are in or who will manage the new branch and make sure they are set up with the correct branch. For user accounts, adjust branch access to ensure that appropriate users have access to the new branch.
- 5. **Assign Branch to Routes Adding Routes When Necessary** – Go to Administration → Scheduling Section → Routes and set-up or reassign routes for the new branch.
- 6. **Add Branch to Existing Opportunity Templates** – Go into Administration → Estimating Section → Manage Opportunity Templates and add the new branch to the templates that should be available for the new branch or create new templates as necessary.
- 7. **Create Inventory Location(s)** – Go to Administration → Purchasing Section → Manage Inventory Locations to create a new inventory location for the new branch. This is necessary to allow time to be recorded properly on the *Time Entry* screen for the new routes.
- 8. **Update Pricing Settings** – Go into Administration → Estimating Section → Manage Pricing and adjust any services that need to have a separate markup rate for the new branch or leave the branch field blank. If the branch field is blank it will use that markup for services in any branch.
- 9. **Place Appropriate Properties in the Branch** – From the *Properties Search List* screen using the *Bulk Edit* feature, assign the new branch to properties whose revenue and cost should be associated with the branch.

- ❑ 10. **Establish Workflows for the Branch** – Go to Administration → Estimating Section → Manage Workflows and set-up opportunity approval workflows as necessary for the new Branch.
- ❑ 11. **Establish Print Layouts for the Branch** – Submit a chat to AspireCare through the Resource Center to either, a) Assign existing print layouts to the branch; OR b) Create new print layouts for the branch.
- ❑ 12. **Establish Catalog Price List** – If necessary for your operation, Go to Administration → Application Section → Manage Lists → Catalog Price List and create a new catalog price list for the branch.
- ❑ 13. **Tie Catalog Price List to Branch** – Go to Administration → Organization → Branches and select the new branch. In the Catalog List field, select the newly created catalog price list.
- ❑ 14. **Set Special Pricing on Items** – Go to Administration → Estimating Section → Manage Pricing. For each item that has special pricing in the branch, select the item and click the *Manage Price List*  icon to add the new price list and associated pricing.

Other Important Things to Consider:

- Will employees be working across multiple branches? This will require them to have multiple selected branches, or *All Branch Access* in their user settings for branch access.
- Will crews from one branch be servicing properties in another branch? The revenue and expenses will follow the branch associated with the property, not the branch with which the crews are associated.
- Do you want your invoice email to be set-up on the branch level or on the company level? If you want it set-up on the branch level, you will need to go to set this up on the *Invoicing* tab on the *Branch* screen available in Admin under the *Manage Branches* option.
- Will you be moving inventory from existing branches to the new one? To accomplish this, go to the inventory location wherein the product already exists, and use the blue arrows inside the *Inventory Location Allocations* tab to move product to the inventory location for the new branch.