

Efficient Invoice Management on the Aspire Platform

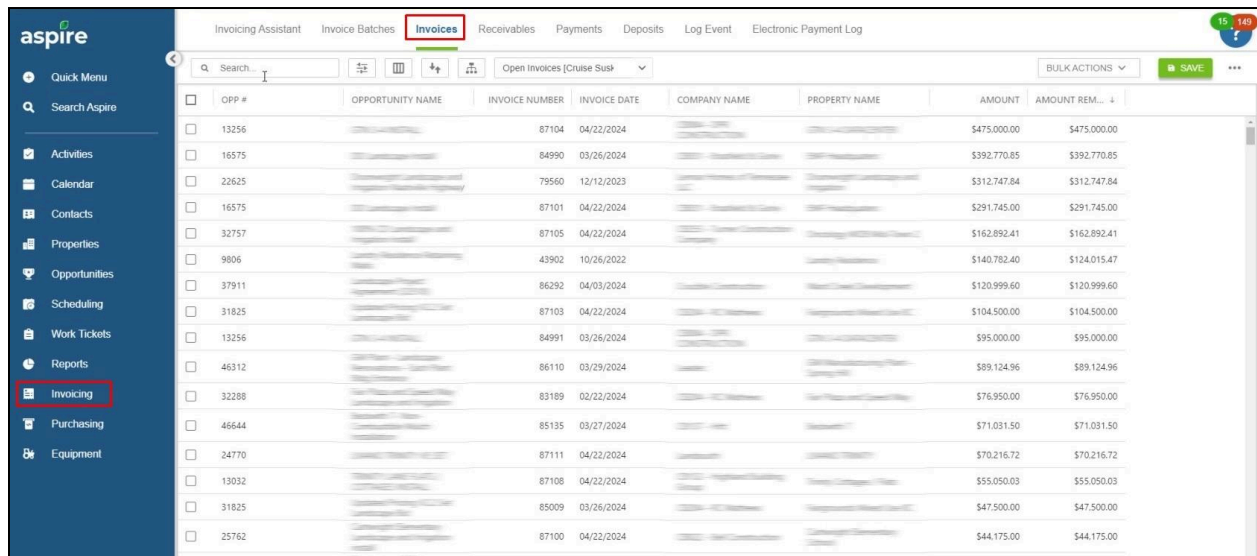
Efficiently managing invoices is important for smooth business operations. It involves the swift and accurate validation of vendor invoices to ensure they are seamlessly integrated into your financial systems.

Our workflow uses Acumatica validation and Aspire mapping to guarantee precision in invoice processing.

This guide is designed to help you through the process of recording a new payment for an invoice on the Aspire platform. You can follow these simple steps to ensure your payments are accurately recorded and streamlined with your financial management tasks.

Steps to Record a New Payment

1. **Go to 'Invoicing' and select 'Invoices'**
 - Log in to your Aspire account.
 - Navigate to the 'Invoicing' section on the dashboard.
 - Click on 'Invoices' from the dropdown menu.



OPP #	OPPORTUNITY NAME	INVOICE NUMBER	INVOICE DATE	COMPANY NAME	PROPERTY NAME	AMOUNT	AMOUNT REM...
13256		87104	04/22/2024			\$475,000.00	\$475,000.00
16575		84990	03/26/2024			\$392,770.85	\$392,770.85
22625		79560	12/12/2023			\$312,747.84	\$312,747.84
16575		87101	04/22/2024			\$291,745.00	\$291,745.00
32757		87105	04/22/2024			\$162,892.41	\$162,892.41
9806		43902	10/26/2022			\$140,782.40	\$124,015.47
37911		86292	04/03/2024			\$120,999.60	\$120,999.60
31825		87103	04/22/2024			\$104,500.00	\$104,500.00
13256		84991	03/26/2024			\$95,000.00	\$95,000.00
46312		86110	03/29/2024			\$89,124.96	\$89,124.96
32288		83189	02/22/2024			\$76,950.00	\$76,950.00
46644		85135	03/27/2024			\$71,031.50	\$71,031.50
24770		87111	04/22/2024			\$70,216.72	\$70,216.72
13032		87108	04/22/2024			\$55,050.03	\$55,050.03
31825		85009	03/26/2024			\$47,500.00	\$47,500.00
25762		87100	04/22/2024			\$44,175.00	\$44,175.00

2. Paste your invoice number in the search bar

- Copy the invoice number you need to record a payment for.
- Paste the invoice number in the search bar to locate the invoice.

The screenshot shows the 'Invoices' tab in the Aspire software. The search bar at the top contains the number '86154', which is highlighted with a red box. Below the search bar, a table displays one invoice record with the following details:

OPP #	OPPORTUNITY NAME	INVOICE NUMBER	INVOICE DATE	COMPANY NAME	PROPERTY NAME	AMOUNT	AMOUNT REM...
35365	Landscape Management Agreement	86154	04/02/2024			\$265.00	\$265.00

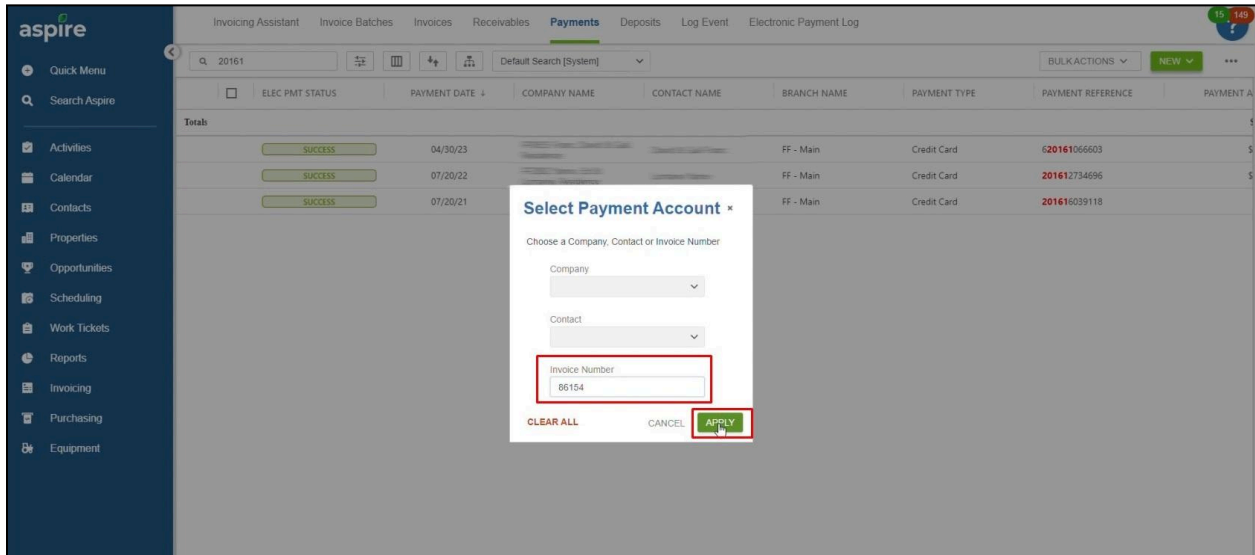
3. Hover over 'Quick Menu' on the sidebar and click on 'New Payment'

- Move your cursor to the 'Quick Menu' located on the sidebar.
- Click on 'New Payment' to start the payment recording process.

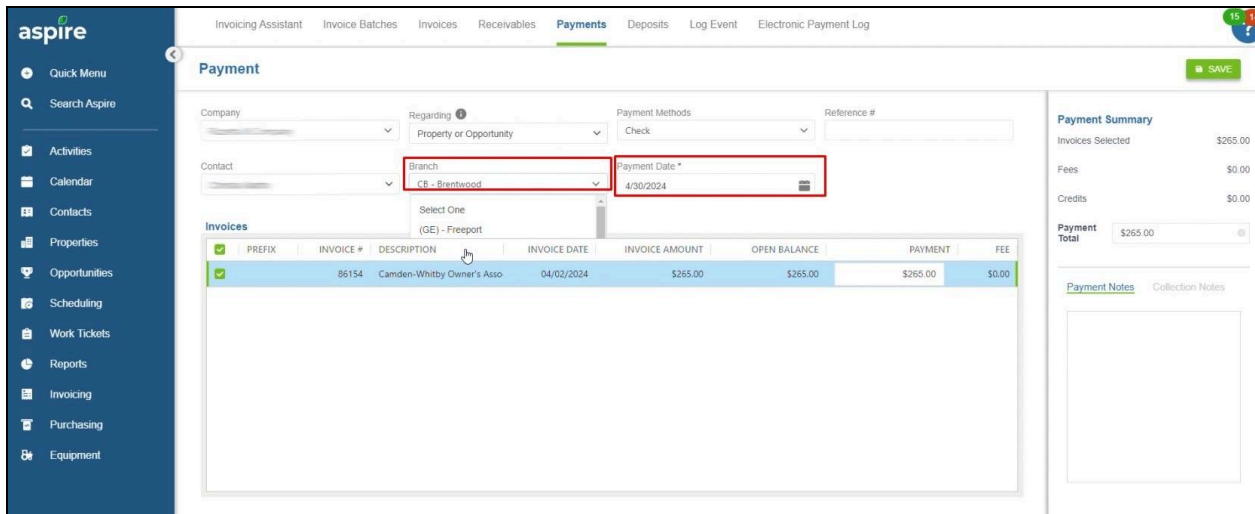
The screenshot shows the 'Payments' tab in the Aspire software. The 'Quick Menu' option in the sidebar is highlighted with a red box. A dropdown menu is open, showing various options, with 'New Payment' highlighted by a red box. The main area displays a table of payment records with the following columns: STATUS, PAYMENT DATE, COMPANY NAME, CONTACT NAME, BRANCH NAME, PAYMENT TYPE, PAYMENT REFERENCE, and PAYMENT A.

STATUS	PAYMENT DATE	COMPANY NAME	CONTACT NAME	BRANCH NAME	PAYMENT TYPE	PAYMENT REFERENCE	PAYMENT A
SUCCESS	04/30/23			FF - Main	Credit Card	20161066603	
SUCCESS	07/20/22			FF - Main	Credit Card	201612734696	
SUCCESS	07/20/21			FF - Main	Credit Card	201616039118	

4. **Paste the invoice number again and click 'Apply'**
- Paste the invoice number in the appropriate field.
 - Click on the 'Apply' button to proceed.



5. **Select the branch and add the payment date**
- Choose the appropriate branch from the dropdown menu.
 - Enter the payment date in the designated field.



6. Add the reference number

- Enter the reference number for the payment.

The screenshot shows the 'Payment' form in the Aspire software. The 'Reference #' field is highlighted with a red box and contains the value '2016'. The 'Invoices' table shows one invoice with a payment amount of \$265.00.

✓	PREFIX	INVOICE #	DESCRIPTION	INVOICE DATE	INVOICE AMOUNT	OPEN BALANCE	PAYMENT	FEE
✓		86154	Camden-Whitby Owner's Asso	04/02/2024	\$265.00	\$265.00	\$265.00	\$0.00

7. Copy and paste the property name from 'Invoices' in the 'Regarding' section

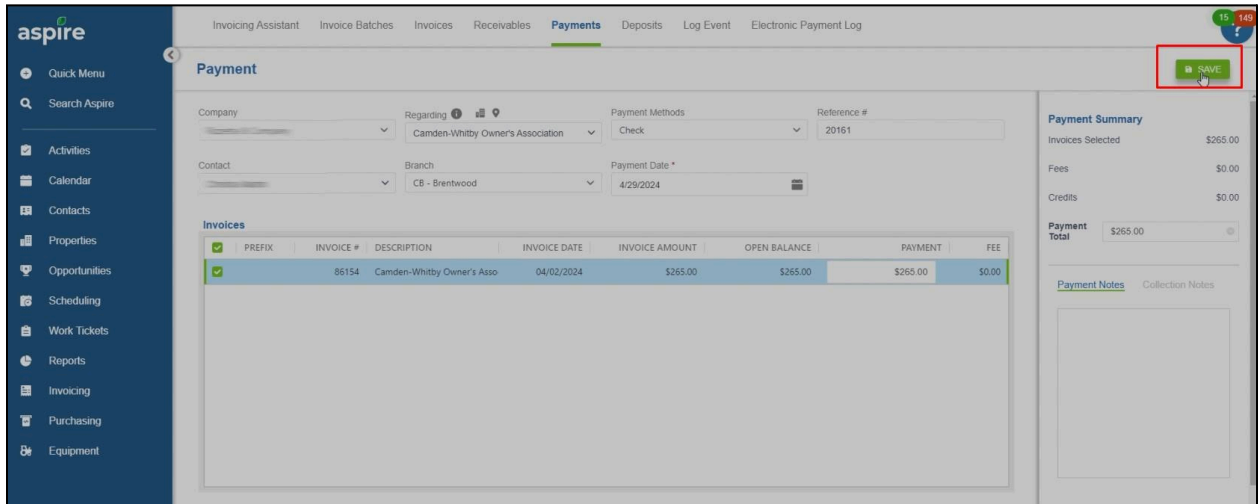
- Locate the property name associated with the invoice in the 'Invoices' section.
- Copy the property name.
- Paste the copied property name into the 'Regarding' section.
- Select the exact name of the property from the options provided.

The screenshot shows the 'Payment' form in the Aspire software. The 'Regarding' dropdown menu is open, showing a list of property names. The 'Camden-Whitby Owner's Association, Inc.' option is highlighted with a red box.

✓	PREFIX	INVOICE #	DESCRIPTION	INVOICE DATE	INVOICE AMOUNT	OPEN BALANCE	PAYMENT	FEE
✓		86154	Camden-Whitby Owner's Asso	04/02/2024	\$265.00	\$265.00	\$265.00	\$0.00

8. Click 'Save'

- After ensuring all details are correctly entered, click the 'Save' button to record the payment.



These steps help you to easily and accurately record a new payment for an invoice on the Aspire platform to keep your invoicing system organized and up-to-date.

Efficient invoice management, supported by tools like Acumatica validation and Aspire mapping helps your business operations run smoothly.