

# Efficiently Managing Purchase Receipts and Work Tickets in Aspire

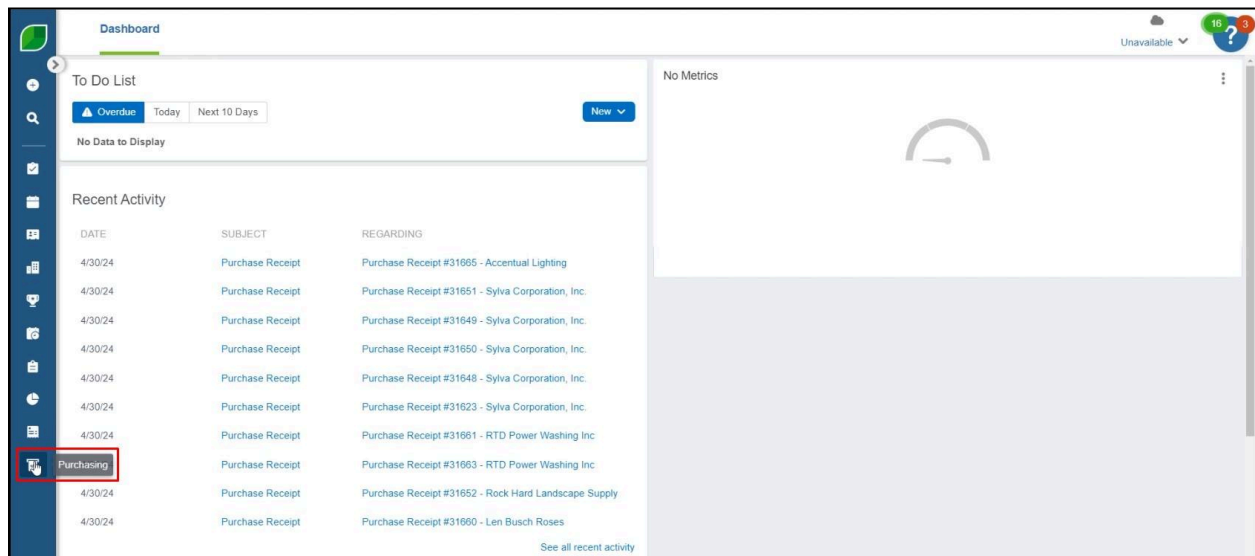
Managing purchase receipts and work tickets efficiently is crucial for maintaining accurate records within Aspire's Purchasing system. When you receive invoices from clients detailing location, property, and materials, the process of updating the Purchasing tab in Aspire becomes a streamlined task.

In this guide, we'll walk you through the essential steps—from creating new purchase receipts based on client information to assigning work tickets and ensuring all data aligns with the corresponding invoice dates. By following these steps, you'll be able to manage your purchase receipts with ease, ensuring your records remain accurate and up-to-date.

## Steps to Manage a Purchase Receipt

### 1. Click on 'Purchasing'

- Begin by logging into your Aspire account.
- Navigate to the 'Purchasing' section from the dashboard.



## 2. Select the 'Branch', 'Inventory Location', and 'Vendor'

- Choose the appropriate branch from the dropdown menu.
- Select the correct inventory location and vendor for the purchase.

Purchasing Assistant Purchase Receipts Daily Plan Report

### New Purchase Receipt

Branch \*  
100 - St. Paul

Inventory Location  
100 - St. Paul

Vendor \*  
Select One

Received

Receipt Status  
New

Invoice Date

Sync Status  
Not synced

Invoice #

Ticket #

ITEM	ITEM TYPE	CATEGORY	QUANTITY	EST. UNIT PRICE	EXT. PRICE
Select a Catalog Item OR Enter a One-Time Item	Material	Select One			
Sub Total					\$0.00
Extra Costs					Select One
Total					\$0.00

Notes

## 3. Select the receiving date on 'Received' and add the invoice date on 'Invoice Date'

- Enter the date the items were received under the 'Received' field.
- Input the invoice date in the 'Invoice Date' field.

Purchasing Assistant Purchase Receipts Daily Plan Report

### New Purchase Receipt

Branch \*  
100 - St. Paul

Received  
4/2/2024

Receipt Status  
New

Invoice Date  
4/2/2024

Sync Status  
Not synced

Invoice #

Ticket #

Submitted to LandscapeHub?  
No

#### Purchase Items

ITEM	ITEM TYPE	CATEGORY	QUANTITY	EST. UNIT PRICE	EXT. PRICE
Select a Catalog Item OR Enter a One-Time Item	Material	Select One			
Sub Total					\$0.00
Extra Costs					Select One
Total					\$0.00

Notes

#### 4. Entering Invoice and Item Details

- **Add the Invoice Number:** Enter the invoice number in the designated field.
- **Go to 'Purchase Items':** Navigate to the 'Purchase Items' section to start detailing the items received.
- **Enter Item Details:** Fill in the necessary details about the purchased items, including descriptions, quantities, and any other relevant information.

The screenshot shows the 'New Purchase Receipt' form. The 'Invoice #' field is highlighted with a red box and contains the value '15167'. The 'Purchase Items' section is also highlighted with a red box. The table below shows the item details:

ITEM	ITEM TYPE	CATEGORY	QUANTITY	EST. UNIT PRICE	EXT. PRICE
Sub: ENH - Dollars					
Sub: GM - Dollars					
Sub: IRR - Dollars					
Sub: LC - Dollars					
Sub: PHC - Dollars					
Sub: SIM - Dollars					
Sub Total					\$0.000
Extra Costs					Select One
Total					\$0.000

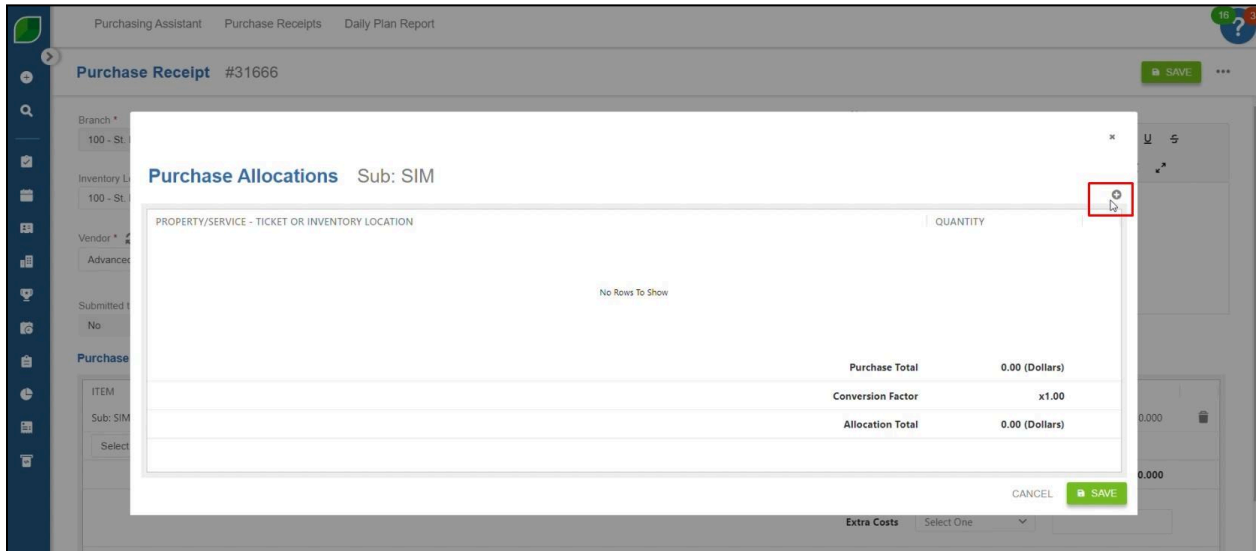
#### 5. Click on 'Quantities'

- Click on the 'Quantities' button to specify the quantity of each item.

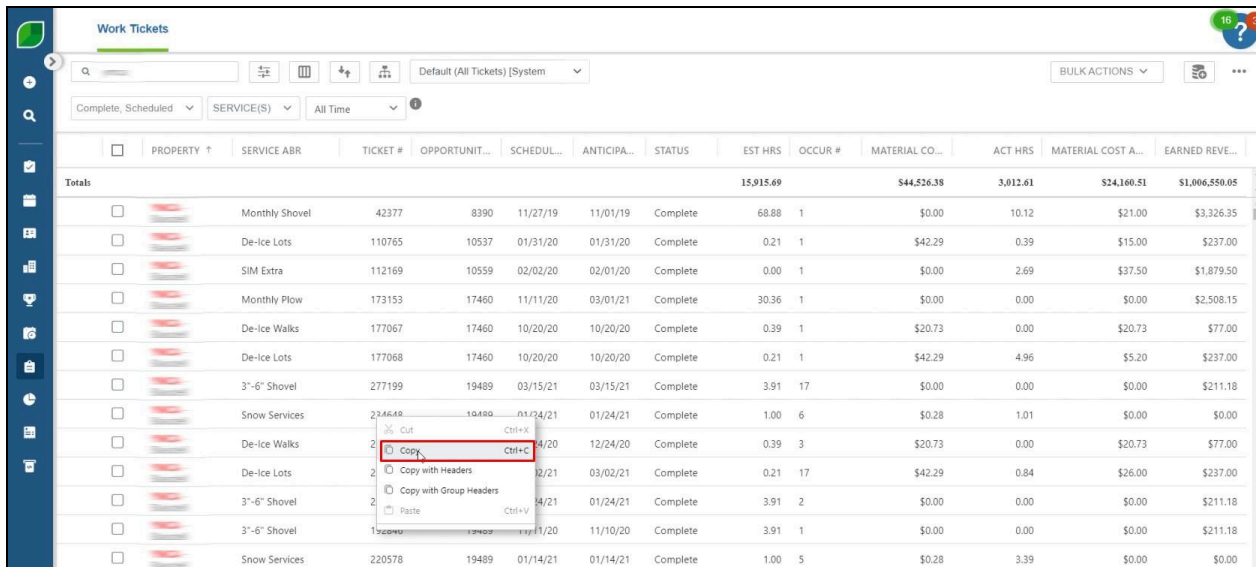
The screenshot shows the 'New Purchase Receipt' form. The 'QUANTITY' column header in the 'Purchase Items' table is highlighted with a red box. The table below shows the item details:

ITEM	ITEM TYPE	CATEGORY	QUANTITY	EST. UNIT PRICE	EXT. PRICE
Sub: SIM - Dollars	Sub	Sub	0.00	\$1.000	
Select a Catalog Item OR Enter a One-Time Item					
Sub Total					\$0.000
Extra Costs					Select One

6. **Hover over the settings icon near quantities in the 'Purchase Allocation' tab**
  - The 'Purchase Allocation' tab will appear.
  - Hover your cursor over the settings icon next to the quantities and click on it.

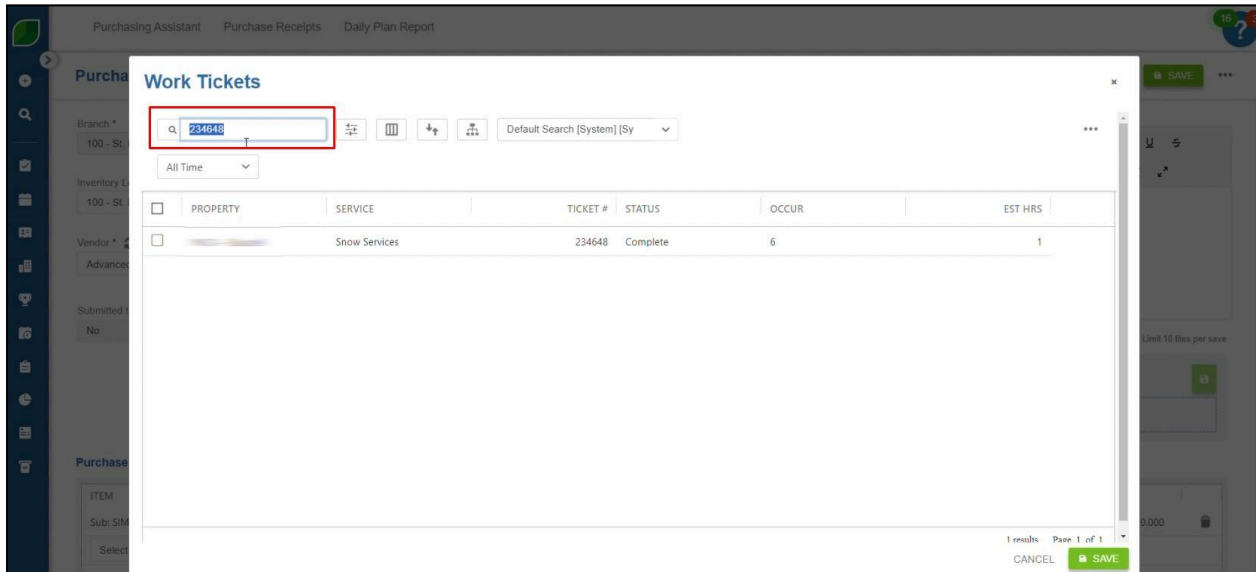


7. **Copy the 'Ticket' number from the 'Work Ticket' page**
  - A 'Work Ticket' page will open.
  - Copy the ticket number displayed on this page.



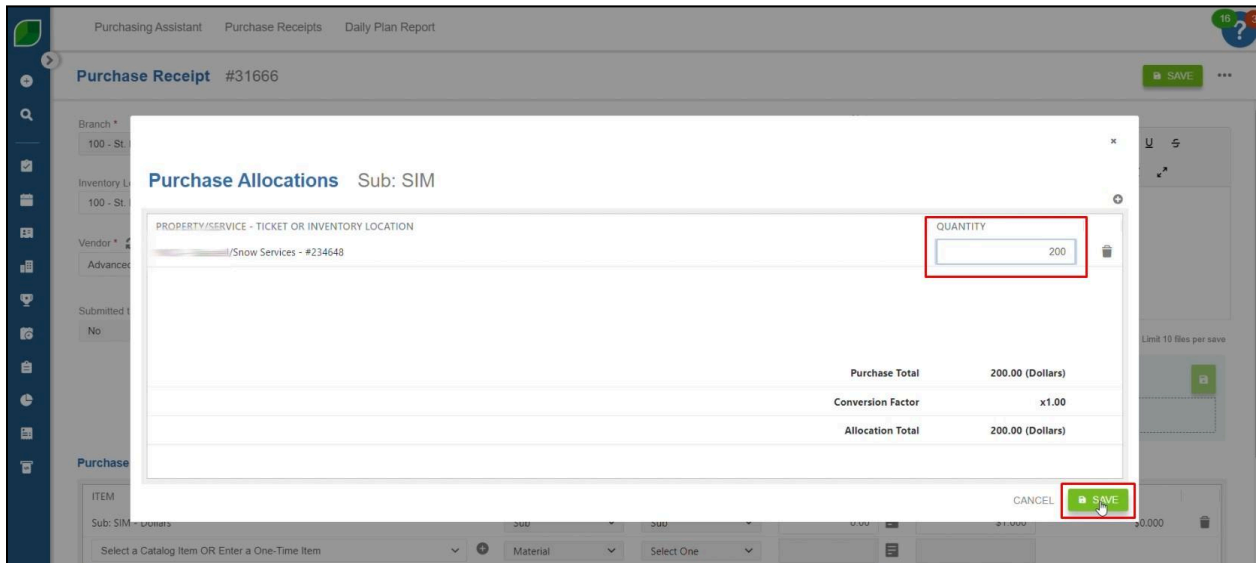
**8. Go to 'Work Ticket' and enter the ticket number in the search bar**

- Navigate to the 'Work Ticket' section.
- Paste the ticket number into the search bar and open the ticket profile.



**9. Enter the quantity of purchase item in 'Quantities' on the 'Purchase Allocation' tab and click 'Save'**

- Once again, the 'Purchase Allocation' tab will appear for the selected ticket.
- Enter the quantity of the purchased item in the 'Quantities' section.
- After entering the quantities, click 'Save' to confirm the allocation.



## 10. Click 'Save' on the 'Purchase Receipt'

- Finally, ensure all information is correct and click 'Save' on the 'Purchase Receipt' to complete the process.

Purchasing Assistant Purchase Receipts Daily Plan Report

**Purchase Receipt #31666** SAVE

Branch \* 100 - St. Paul Received 4/2/2024 Receipt Status New

Inventory Location \* 100 - St. Paul Invoice Date 4/2/2024 Sync Status Not synced

Vendor \* Advanced Construction Invoice # 15167 Ticket

Submitted to LandscapeHub? No

Notes

Attachments Limit 10 files per save

UPLOAD FILES 0 Or Drop files

**Purchase Items**

ITEM	ITEM TYPE	CATEGORY	QUANTITY	EST. UNIT PRICE	EXT. PRICE
Sub: SIM - Dollars	Sub	Sub	200.00	\$1.000	\$200.000
Select a Catalog Item OR Enter a One-Time Item	Material	Select One			

By following this step-by-step guide, you can efficiently manage both purchase receipts and work tickets in Aspire, ensuring that all details are accurately recorded and aligned with your client's invoices. This streamlined approach not only keeps your purchasing records organized but also enhances the overall efficiency of your operations.