

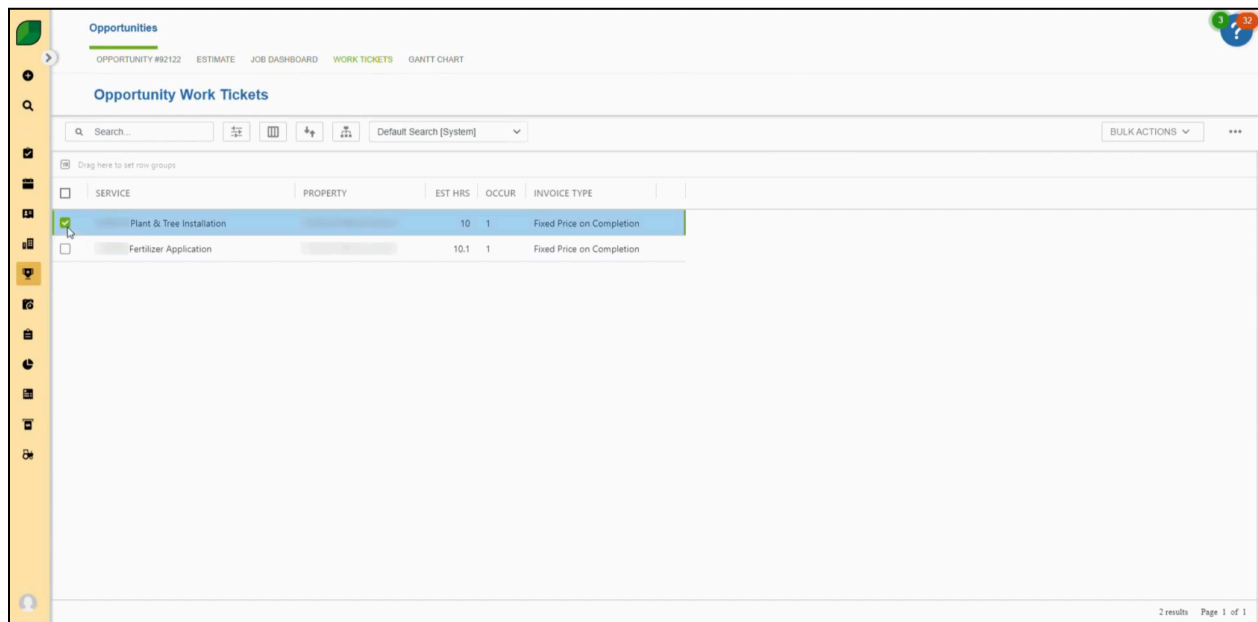
Invoice Creation in Aspire

This job aid provides step-by-step instructions for completing work tickets and generating invoices using the Aspire system. Following these steps will ensure that all necessary information is properly entered, and work tickets are accurately processed. This guide is essential for managing tasks, ensuring smooth workflow, and completing invoices efficiently.

Steps for Completing Work Tickets:

1. Access Work Tickets:

- Click on the **Work Tickets** tab in the Aspire system.
- Select the relevant tickets by checking the box next to each ticket that needs to be completed.



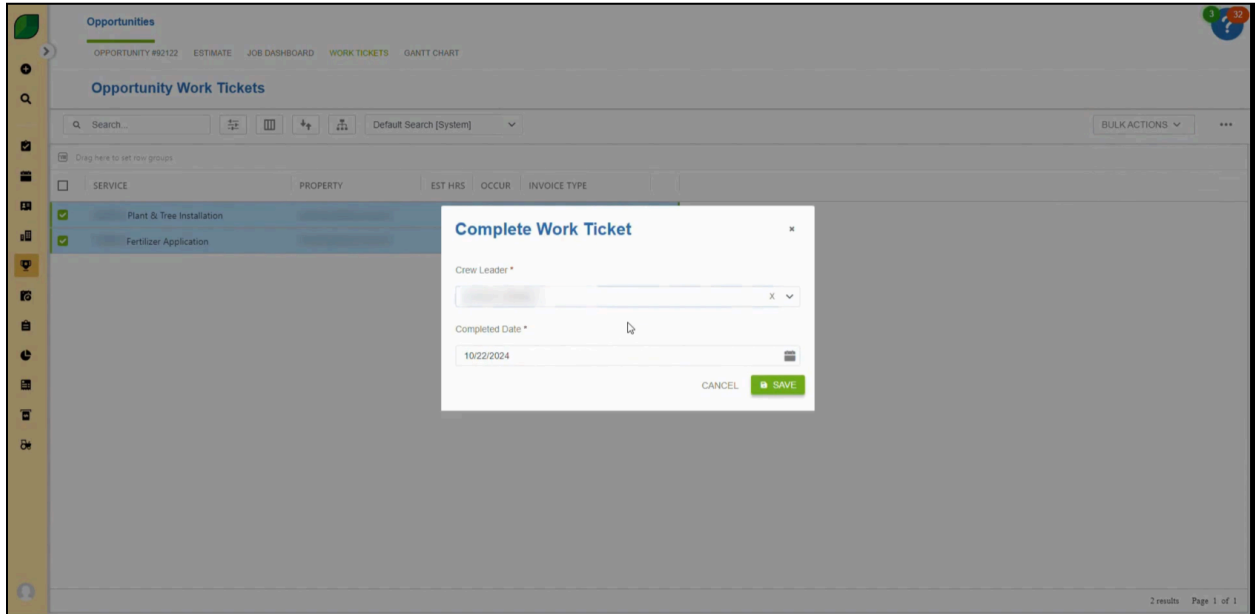
The screenshot displays the 'Opportunity Work Tickets' interface in the Aspire system. The page title is 'Opportunities' with a sub-header 'Opportunity Work Tickets'. The breadcrumb navigation includes 'OPPORTUNITY #92122', 'ESTIMATE', 'JOB DASHBOARD', 'WORK TICKETS', and 'GANTT CHART'. The main content area shows a table with the following columns: SERVICE, PROPERTY, EST HRS, OCCUR, and INVOICE TYPE. Two tickets are listed:

SERVICE	PROPERTY	EST HRS	OCCUR	INVOICE TYPE
<input checked="" type="checkbox"/> Plant & Tree Installation		10	1	Fixed Price on Completion
<input type="checkbox"/> Fertilizer Application		10.1	1	Fixed Price on Completion

The 'Plant & Tree Installation' ticket is highlighted in blue, and its checkbox is checked. The bottom right corner of the page shows '2 results Page 1 of 1'.

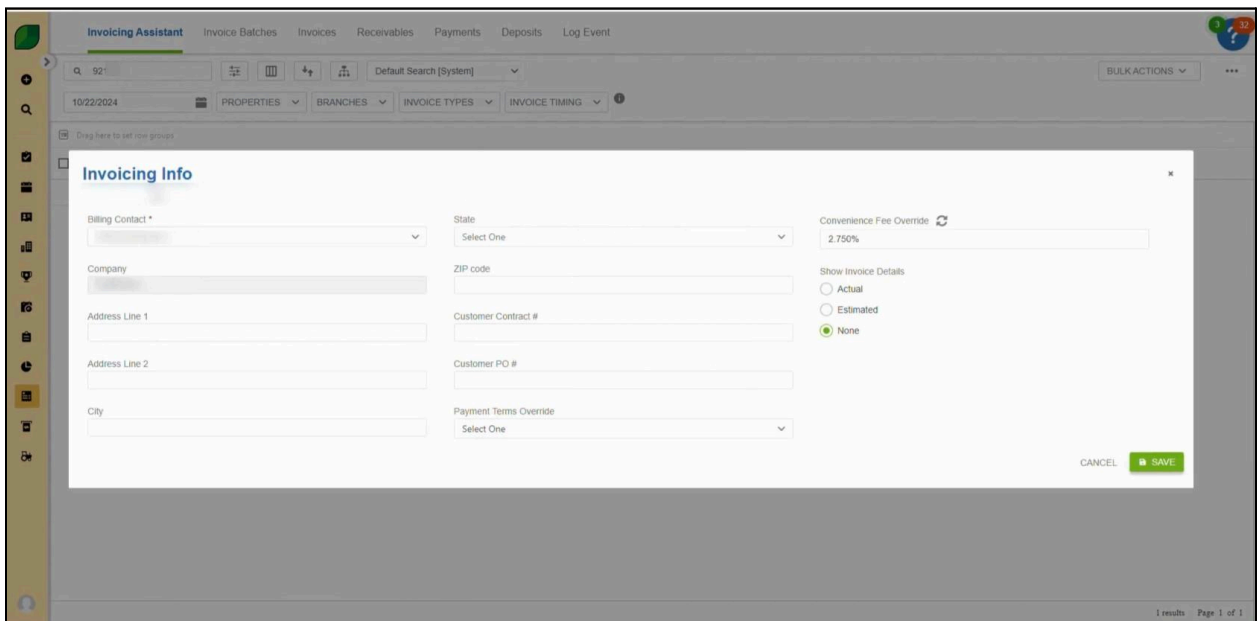
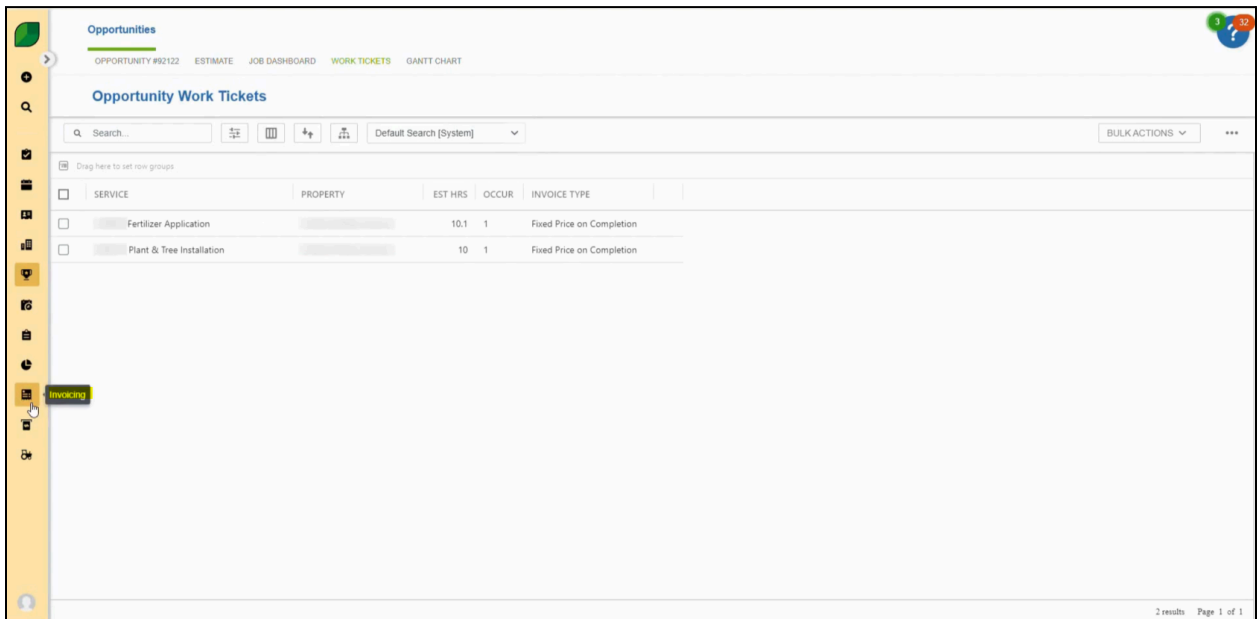
2. Complete Work Tickets:

- On the right side, click on the **Bulk Actions** drop-down menu and select **Complete**.
- A "Complete Work Ticket" window will pop up. Under the **Crew Leader** field, verify the property name that is shown.
- Once verified, click **Save**.



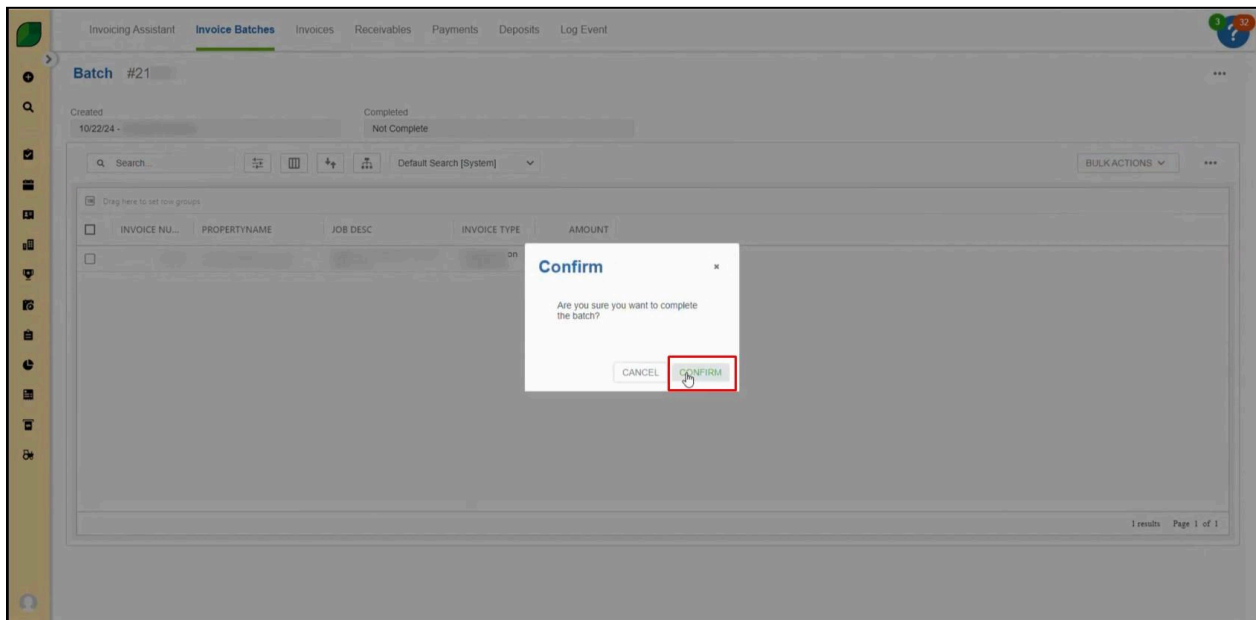
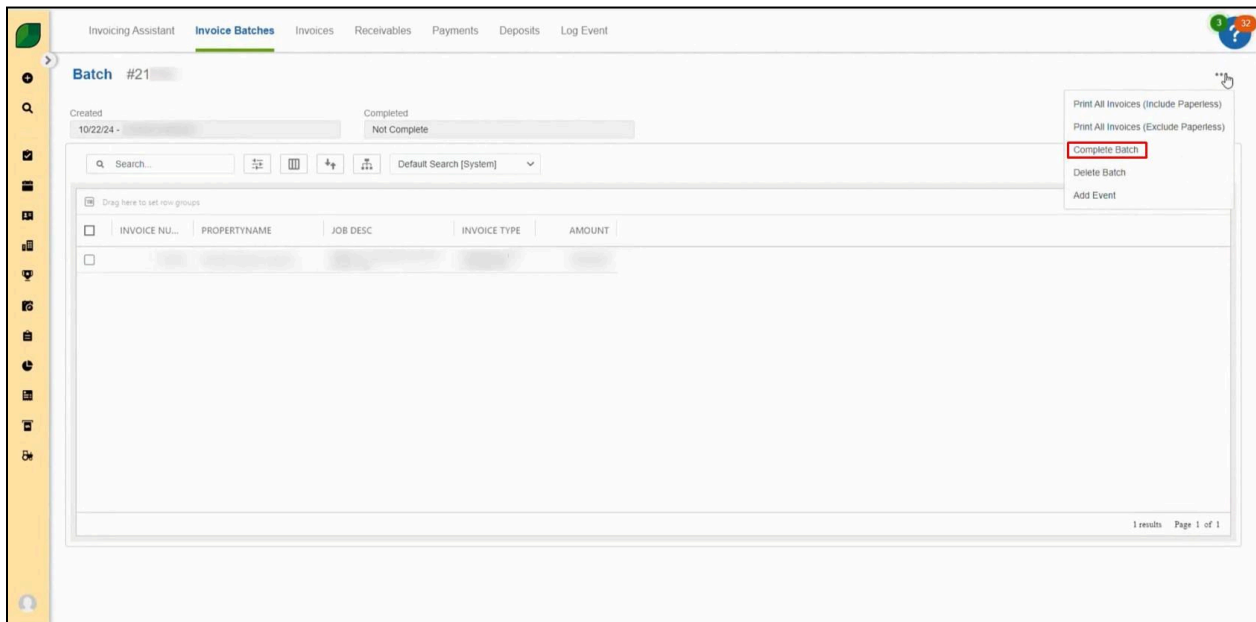
3. Invoicing Setup:

- In the sidebar, click on **Invoicing**.
- On the top left of the screen, search for the ticket number (be sure to note this number for reference).
- Once the ticket status appears, select **Address Required**.
- A window will open, prompting you to fill in the address details:
 - Select the **State**.
 - Enter the **Address, Zip Code, and City**.
 - After entering the details, click **Save**.



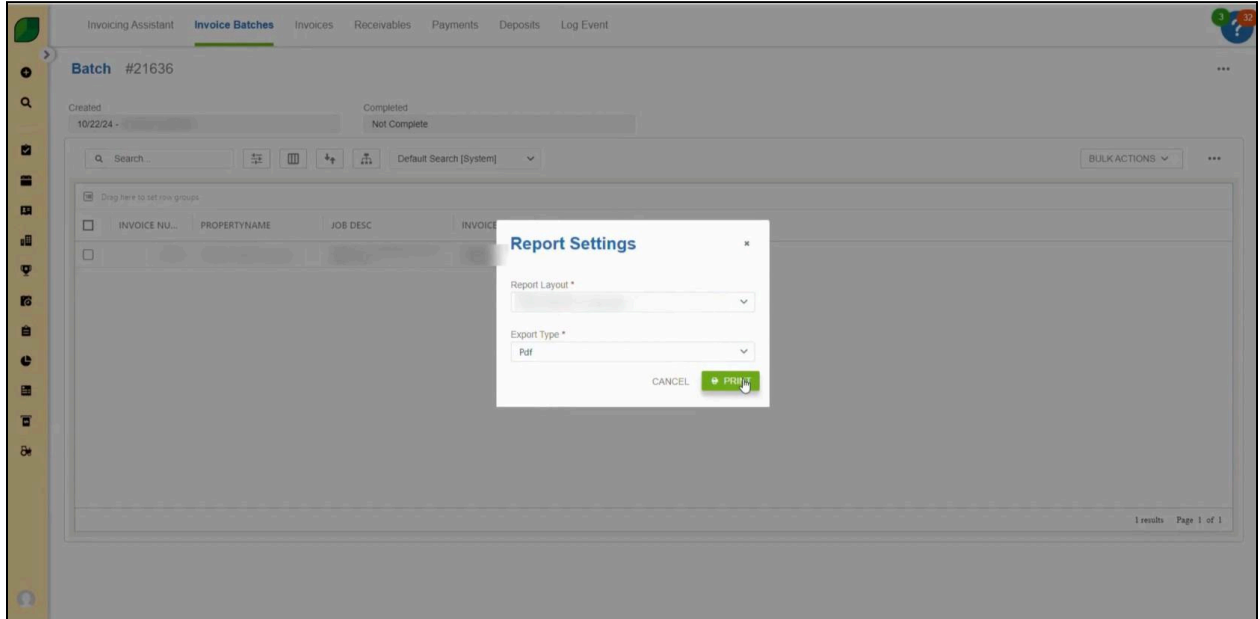
4. Generating Invoices:

- After saving the address, the ticket status will change to **Ready** from **Action Required**.
- Select the ticket again and, from the **Bulk Actions** menu on the right side, click **Generate Invoice** and then click **Save**.
- Next, click on the three dots next to **Bulk Actions** and select **Complete Batch**.
- Confirm the completion by clicking **Confirm**.



5. Printing the Invoice:

- The **Report Setting** window will pop up.
- Under the report settings, select **Invoice DI** and click on **Print**.
- This process will clear the ticket.



Steps for Payment Processing:

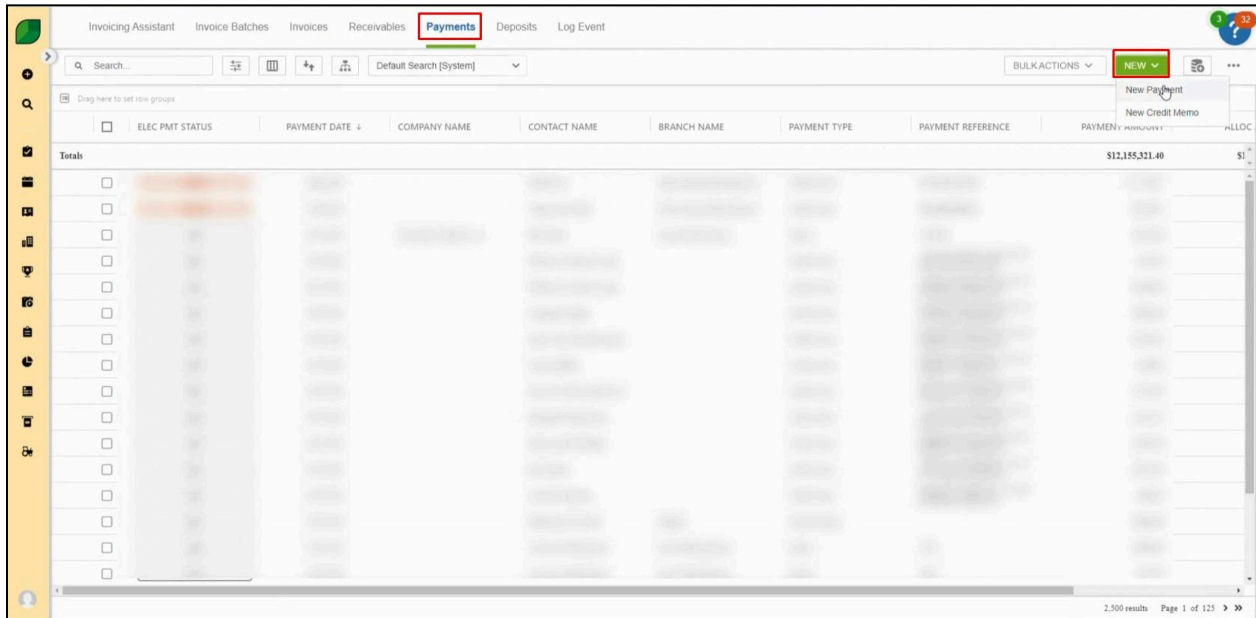
1. Locate and Copy Invoice Number:

- Go back to **Invoices** at the top of the page.
- Search for the invoice by its number or amount.
- Click on the invoice number, and once it appears, copy it from the top of the page.

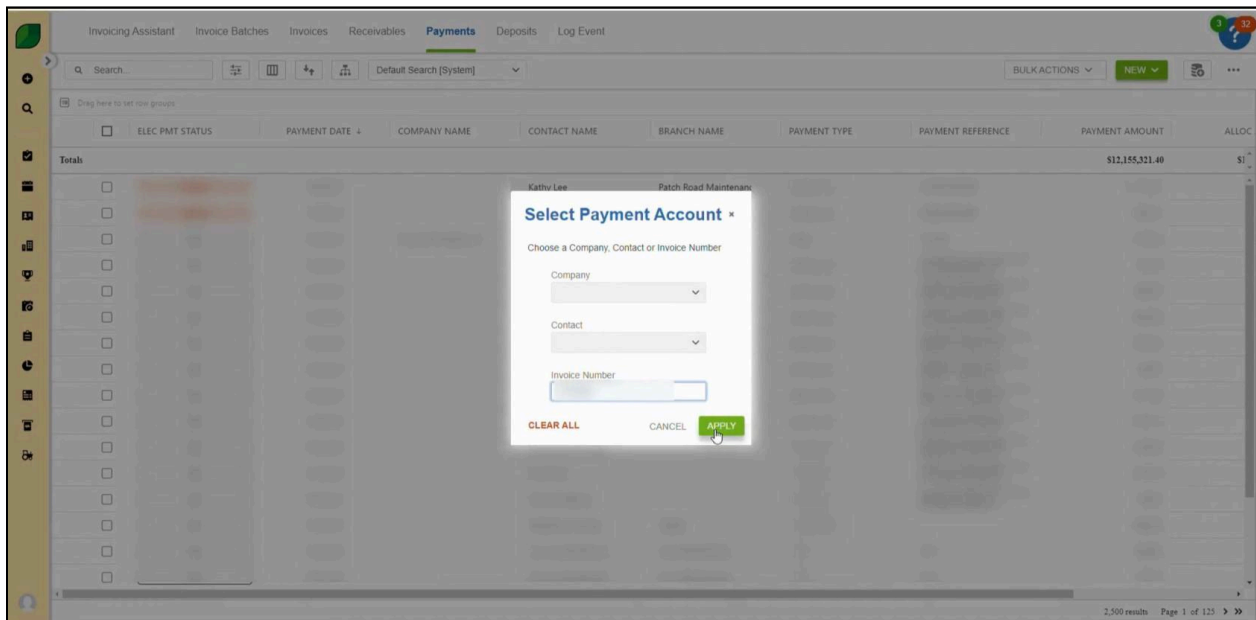
The screenshot displays a software interface with a navigation menu at the top containing 'Invoicing Assistant', 'Invoice Batches', 'Invoices', 'Receivables', 'Payments', 'Deposits', and 'Log Event'. The 'Invoices' tab is highlighted with a red border. Below the menu is a search bar with a magnifying glass icon and a dropdown menu set to 'Default Search [System]'. A sidebar on the left contains various icons for navigation. The main area features a table with the following columns: INVOICE NUMBER, INVOICE DATE, PROPERTY NAME, AMOUNT, and AMOUNT REMAL... The table contains multiple rows of data, which are blurred. At the bottom right of the interface, it shows '195 results Page 1 of 10'.

2. Apply the Payment:

- Click on **Payments**, located next to **Bulk Actions**.
- Select **New** and then choose **New Payment**.



- In the new payment window, paste the copied invoice number and click **Apply**.



- A payment window will open.
- Under the **Regarding** section, enter the invoice number and select the appropriate name.
- Fill in the **Branch** and set the **Reference Number** to "Test Payment".

- Finally, click **Save**.

The screenshot shows a 'Payment' form in a software application. The form includes the following fields and sections:

- Company:** A dropdown menu.
- Regarding:** A dropdown menu.
- Payment Methods:** A dropdown menu set to 'Check'.
- Reference #:** A text input field containing 'test payment'.
- Contact:** A dropdown menu.
- Branch:** A dropdown menu.
- Payment Date *:** A date picker set to '10/22/2024'.
- SAVE:** A green button in the top right corner.
- Invoices Table:** A table with columns: PREFIX, INVOICE #, DESCRIPTION, INVOICE DATE, INVOICE AMOUNT, OPEN BALANCE, PAYMENT, FEE. One row is visible with a green checkmark in the first column.
- Credits Table:** A table with columns: CREDITS, PROPERTY OR OPPORTUNITY, CREDIT AMOUNT, OPEN BALANCE, PAYMENT.
- Payment Summary:** A section on the right showing:
 - Invoices Selected: \$5,045.29
 - Fees: \$0.00
 - Credits: \$0.00
 - Payment Total: \$5,045.29
- Payment Notes:** A section with a 'Collection Notes' sub-section and a text area.

3. Finalizing the Ticket:

- After saving, the ticket process will be complete.

By following these instructions, you can ensure that work tickets are properly completed, invoices are generated, and payments are applied within Aspire. Proper completion of these tasks is crucial for maintaining accuracy and ensuring efficient workflow management. Use this guide as a quick reference for handling work tickets and invoicing within the system.