Creating Estimates by Copying Opportunities

Creating estimates by copying opportunities in Aspire is a quick and efficient way to generate new estimates using existing opportunity details. This method allows you to save time, maintain accuracy, and streamline your workflow within Aspire's Accounts Receivable module. Follow the steps below to create an estimate by copying an opportunity.

Steps to Create an Estimate by Copying an Opportunity

1- Go to Aspire Dashboard and Navigate to Properties

• Log in to Aspire and access the main dashboard. Locate the "Properties" section.



2- Select the Property and Open Opportunities

• Choose the relevant property and scroll to the "Opportunities" section.

Test Property , IL				SAVE
Account Owner	Primary Contact	Company	Next Activity	NEW ¥
free control	The second	The local data		
Earned Revenue	Account Balance	Previous Site Audit	None	
\$0.00	\$0.00	6/17/2024 Score: 0	•	
Gross Margin	Previous Visit	Next Visit	Attachments	
0.00%			B UPLOAD	Ø VIEW ALL (5)
Opportunities				
Opportunities Q Search	₩ Ш 4 + Å (Default Search (System) 🛛 🗸		NEW OPPORTUNITY
Opportunities Q. Search OPPORTUNITY	DIVISION STA	Default Search (System) V TUS VALUE	PROBABILITY ANTIC. CLOSE OPP	NEW OPPORTUNITY
Opportunities Q Search OPPORTUNITY Totals		Default Search [System] V TUS VALUE 50	PROBABILITY ANTIC. CLOSE OPP 42%	NEW OPPORTUNITY
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3- Copy the Previous Opportunity for 2024

- Click the three dots beside the "Save" option and select "Copy."
- Check all required boxes in the pop-up and click "Save."

Contract #205 Test Pro	perty					B SAVE
Opportunity Name *	Due Date		Renewal Date			Renew
2024 Residential Maintenance				-	Status: Canceled	Uncancel
					RENEW	Print Proposal
Lead Source	Sales Rep*		Anticipated Close Date	-	(ALAL)	Email Proposal
Repeat Client	~			-	Next Activity	Сору
Probability %	Division *		Start Date		Hext Addring	Save as Template
100%	Maintenance	~	3/1/2024		None	Visit Notes
						Dil Report
Sales Type	Ops Manager		End Date			P&L Report
Select One	✓ Select One	~	12/31/2024	=	Attachments	P&L Completed Rep
	Master Job		Branch Override		B UPLOAD	Job Report
Eived Payment	Select One	~	Select One		Or Deep Film	Transaction List
Theorem in the second sec					Or Drop Files	Work Tickets
Template	Property Name		Budget \$			Open in PropertyInte
2025 Residential Maintenance	Test Property		\$0.00		Included in Budget	
Estimated S	Status * 🕦 💆		Tags 🛈			
\$0.00	Canceled			~		



4- Update Opportunity Details to 2025

• Modify the opportunity name, start date, and end date as needed.

Contract #252 Test Pro	operty					a sa
Opportunity Name *		Due Date		Renewal Date		
2025 Residential Maintenance					-	Status: New Create an estimate to get started!
Lead Source		Salas Pap *		Anticipated Close Date		CREATE ESTIMATE
Repeat Client	~		~		-	
						Next Activity NEW ~
Probability %		Division *		Start Date		None
100%		Maintenance	· · · · · · · · · · · · · · · · · · ·	3/1/202 I		
Sales Type		Ops Manager		End Date		
Select One	~	Select One		12/31/2024		Attachments
Invoice Type		Master Job		Branch Override		B UPLOAD Q VIEWAI
Fixed Payment	~	Select One	~	Select One	~	Or Drop Files
Template		Property Name		Budget \$		
Add Template		Test Property		\$0.00		Included in Budget
Estimated \$		Status *		Tags		
\$0.00		New	~		~	
Additional Linear						
Additional Users						

5- Create an Estimate

• Click the three dots again and select "Create Estimate."

Contract #252 Test Pr	roperty						B SAVE
Opportunity Name *		Due Date		Renewal Date			Create Estimate
2025 Residential Maintenance						Status: New Create an estimate to get started!	Lost
Lead Source		Salas Pap *		Anticipated Close Date		CREATE ESTIMATE	Сору
Repeat Client	~	Sales Kep	~				Delete Opportunity
						Next Activity	Create in PropertyInte
Probability %		Division *		Start Date		None	
100%		Maintenance		3/1/2025	=		
Sales Type		Ops Manager		End Date			
Select One	~	Select One	~	4/1/2025	-	Attachments	
							Ø VIEW ALL (0)
Invoice Type		Master Job		Branch Override			
Fixed Payment	~	Select One	~	Select One	~	Or Drop Files	
Template		Property Name		Budget \$			
Add Template		Test Property		\$0.00		Included in Budget	
						- monueu in buuget	
Estimated \$		Status *		Tags			
50.00		New	~		~		
Additional Users							
Select One	~						

6- Finalize the Estimate

- Add the required items and services.
- Click the three dots once more and select "Estimate Complete."

	Opportunities									٩	234
• • •	Estimate #25 Resid	dential Maintenance	est Property							o ••	•••
	Image: select one Image: select one Image: select one Image: select one	000 QTY	COMP	PH	TH	P/P	TP \$0.00 \$0.00	GM % 0.00% 0.00%	 Est Total Over Brea Net f Gros Est	Import Adjust Service Pricing Adjust Kil Item Cost Edit Payment Schedule Pricing Summary Print Estimate Sheet Open in PropertyIntel Z Print Proposal Email Proposal	00 00 56 56

Copying opportunities to create estimates in Aspire ensures efficiency and consistency while reducing manual data entry. By following these simple steps, you can quickly generate accurate estimates for your properties. This process helps streamline operations in the Accounts Receivable module, making it easier to manage and track estimates within Aspire.