

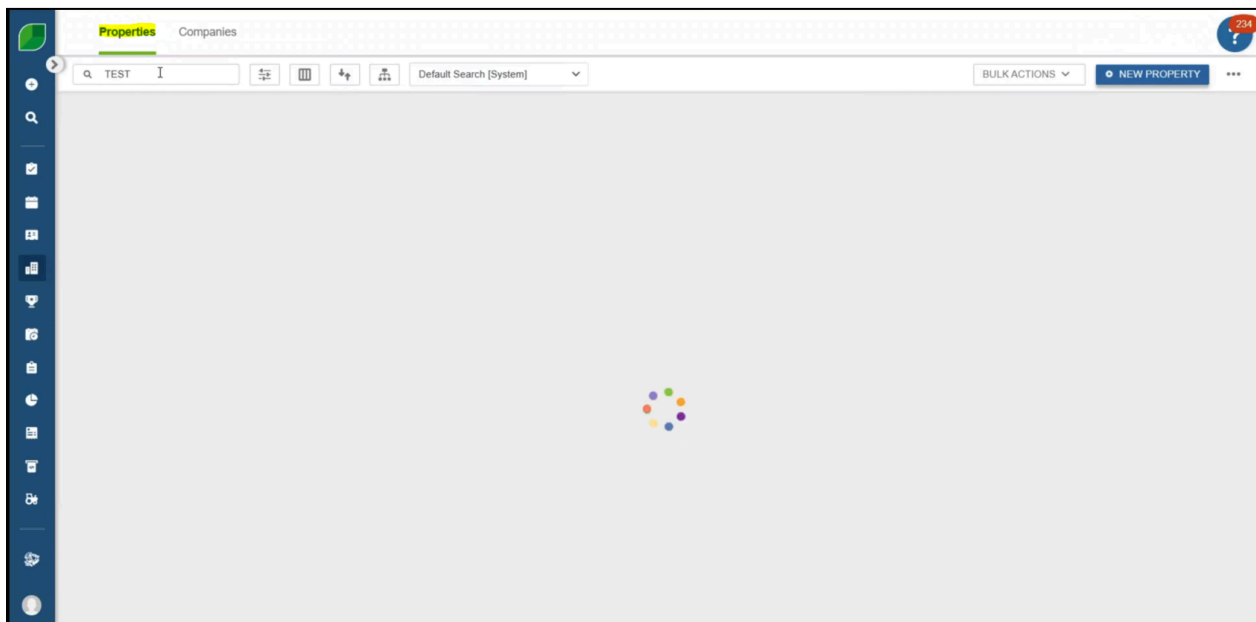
Creating Estimates by Copying Opportunities

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

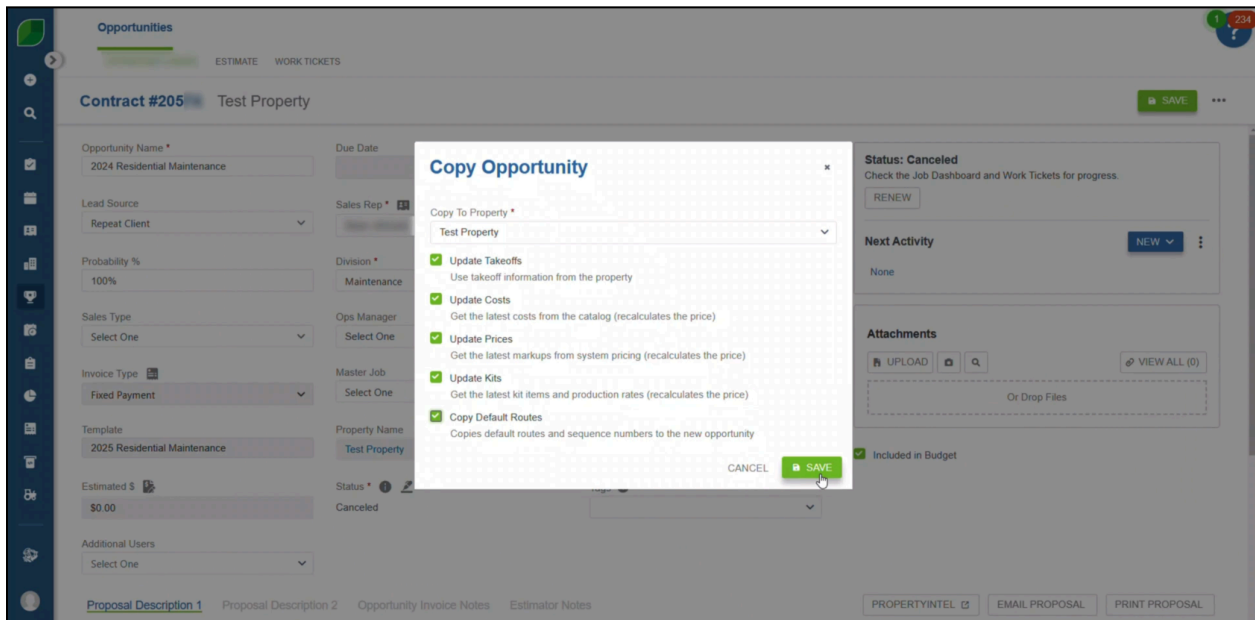
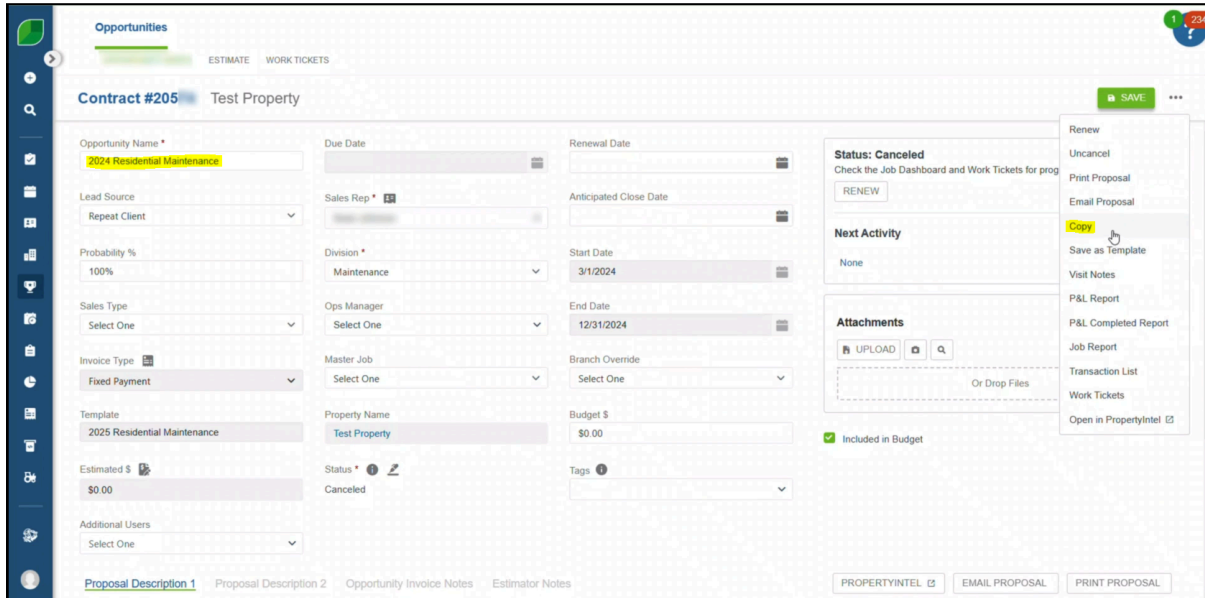
- Choose the relevant property and scroll to the "Opportunities" section.

The screenshot displays a software interface for property management. At the top, there are tabs for "Properties" and "Companies". The main header shows "Test Property, IL" with a "SAVE" button. Below this, there are several input fields for "Account Owner", "Primary Contact", "Company", "Earned Revenue" (\$0.00), "Account Balance" (\$0.00), "Previous Site Audit" (6/17/2024 Score: 0), "Gross Margin" (0.00%), "Previous Visit", and "Next Visit". To the right, there is a "Next Activity" section with a "NEW" button and a dropdown menu set to "None". Below that is an "Attachments" section with an "UPLOAD" button, a search icon, and a "VIEW ALL (5)" button. The main content area is titled "Opportunities" and features a search bar, a "NEW OPPORTUNITY" button, and a table with the following data:

OPPORTUNITY	DIVISION	STATUS	VALUE	PROBABILITY	ANTIC. CLOSE	OPPORTUNITY LOST REA...	LOST REASON
Totals			\$0	42%			
	Enhancements	Bidding	\$0	0%			
	Enhancements	New	\$0	0%			
	Maintenance	Won	\$0	100%			
	Maintenance	Won	\$0	100%			
	Maintenance	Bidding	\$0	0%			

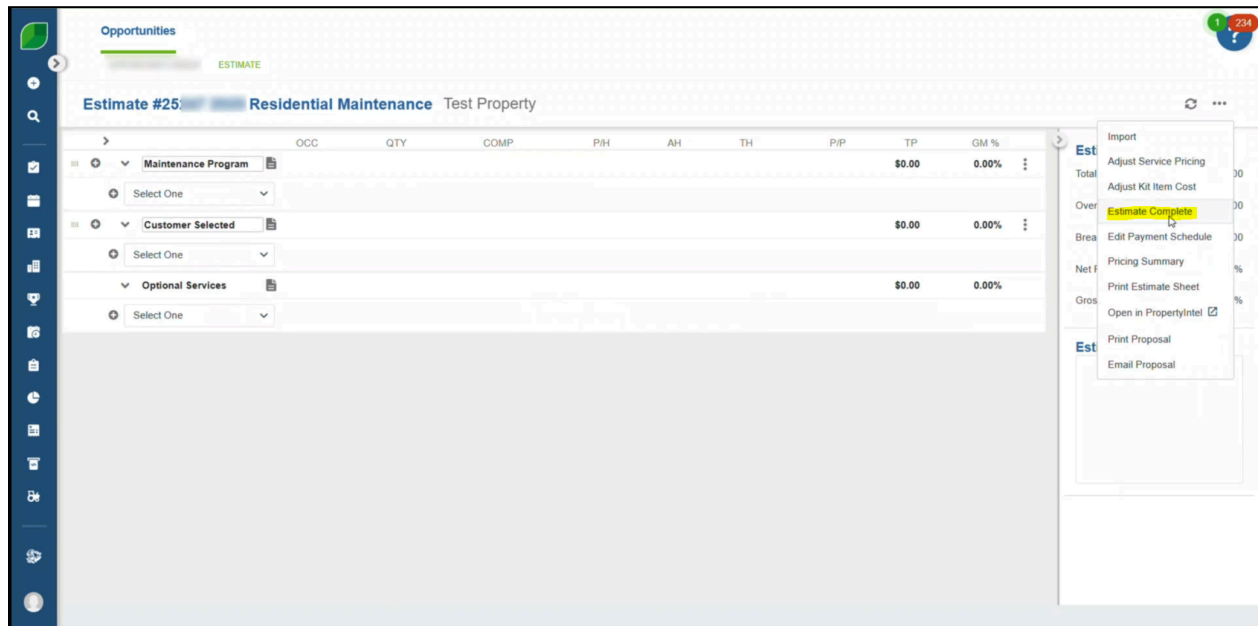
3- Copy the Previous Opportunity for 2024

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



6- Finalize the Estimate

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



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.