

2. Click on Payments and Select Online Only from the Drop-Down

- In the invoicing section, locate and select the "Payments" option.
- In the payment options, choose "Online Only" from the drop-down menu.

	ELEC PMT STATUS	PAYMENT DATE	CONTACT NAME	BRANCH NAME	PAYMENT TYPE	PAYMENT REFERENCE	PAYMENT AMOUNT	ALLOC
Totals							\$6,176,748.94	\$t
	ERROR	02/04/25		Carrollton	Credit Card		\$278.75	
	ERROR	02/04/25		Dallas	Credit Card		\$19,351.55	
	ERROR	01/30/25		Dallas	Credit Card		\$19,352.00	
	ERROR	01/30/25		Dallas	Credit Card		\$11,490.28	
	ERROR	01/20/25		Dallas	EFT		\$7,207.44	
	ERROR	01/20/25		Dallas	EFT		\$1,500.00	
	ERROR	01/13/25		Dallas	Credit Card		\$2,673.43	
	ERROR	01/09/25		Dallas	Credit Card		\$157.55	
	ERROR	01/09/25		Dallas	Credit Card		\$2,992.71	
	ERROR	12/30/24		Dallas	Credit Card		\$2,992.71	
	ERROR	12/26/24		Dallas	Credit Card		\$27,974.07	
	ERROR	12/26/24		Dallas	Credit Card		\$2,992.71	
	ERROR	12/26/24		Carrollton	Credit Card		\$295.49	
	ERROR	12/26/24		Carrollton	Credit Card		\$975.09	
	ERROR	12/24/24		Dallas	Credit Card		\$4,194.54	
	ERROR	12/21/24		Carrollton	Credit Card		\$975.09	

3. Select Field Name and Choose the Contact Names then Click Apply

- Use the filter option to select "Contact Name" and pick the required contacts.
- After selecting the contacts, click the "Apply" button to update the list.

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Contact Name	in	Choose

Buttons: CLEAR ALL, CANCEL, APPLY

4. Select Create Deposit

- Choose a contact by ticking the checkbox, then use the drop-down menu on the right to select "Create Deposit."

<input type="checkbox"/>	ELEC PMT STATUS	PAYMENT DATE	PAYMENT AMOUNT	COMPANY NAME	CONTACT NAME	BRANCH NAME	PAYMENT REFERENCE	PAYMENT TYPE	ALLOC
Totals			\$63,258.18						
<input checked="" type="checkbox"/>	SUCCESS	02/21/25	\$278.75			Carrollton		Credit Card	
<input type="checkbox"/>	SUCCESS	02/21/25	\$167.24			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	02/21/25	\$1,633.87			Dallas		Credit Card	
<input type="checkbox"/>	ERROR	02/20/25	\$1,633.87			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	01/20/25	\$479.44			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	01/20/25	\$278.75			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	01/20/25	\$1,633.87			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	12/20/24	\$1,633.87			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	11/20/24	\$1,633.87			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	10/21/24	\$1,633.87			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	10/15/24	\$278.75			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	09/20/24	\$1,633.87			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	09/10/24	\$278.75			Dallas		Credit Card	
<input type="checkbox"/>	SUCCESS	08/26/24	\$278.75			Carrollton		Credit Card	
<input type="checkbox"/>	SUCCESS	08/20/24	\$1,633.87			Dallas		Credit Card	

5. Enter Deposit Date, Then Click Save

- Input the deposit date in the required field and press "Save" to confirm.

Deposit

Deposit Date: 02/24/2025 | Status: New | Created: 02/25/2025 | Accounting Error

Payments

PAYMENT METHOD	CHECK NUMBER	FROM	PAYMENT DATE	PAYMENT AMOUNT
Credit Card			2/21/2025	\$278.75

Total to Deposit \$278.75

6. Repeat for All Contacts You Want to Process

- Follow the same steps for all the contacts that require deposit creation.

7. Switch to Deposit and Review

- Navigate to the "Deposit" section to review your updates.
- The system will now show the latest deposit entries you have made.

DEPOSIT DATE	BRANCH	DEPOSIT STATUS	DEPOSIT AMOUNT	# PAYMENTS
Totals			\$16,600,306.49	6,897
02/24/25	Carrollton	New	\$496.72	1
02/24/25	Carrollton	New	\$278.75	1
02/24/25	Dallas	New	\$1,801.11	2
02/21/25	Dallas	Sent	\$7,519.55	9
02/21/25	Carrollton	Sent	\$4,783.71	7
02/21/25	Dallas	Sent	\$38,899.23	31
02/20/25	Dallas	Sent	\$30,207.99	15
02/20/25	Dallas	Sent	\$9,187.72	4
02/19/25	Dallas	Sent	\$6,726.23	5
02/19/25	Dallas	Sent	\$12,540.12	5
02/19/25	Dallas	Sent	\$7,120.61	6
02/19/25	Dallas	Sent	\$8,424.55	5
02/19/25	Dallas	Sent	\$32,713.32	5
02/19/25	Fort Worth	Sent	\$15,425.63	1
02/18/25	Dallas	Sent	\$2,779.87	2
02/18/25	Carrollton	Sent	\$696.59	1

By following these steps, you can efficiently manage deposits in Aspire, reducing errors and maintaining accurate financial records. Regularly updating deposits ensures a smooth invoicing process and helps keep accounts receivable well-organized. Implement these best practices to enhance financial accuracy and improve overall business operations.