

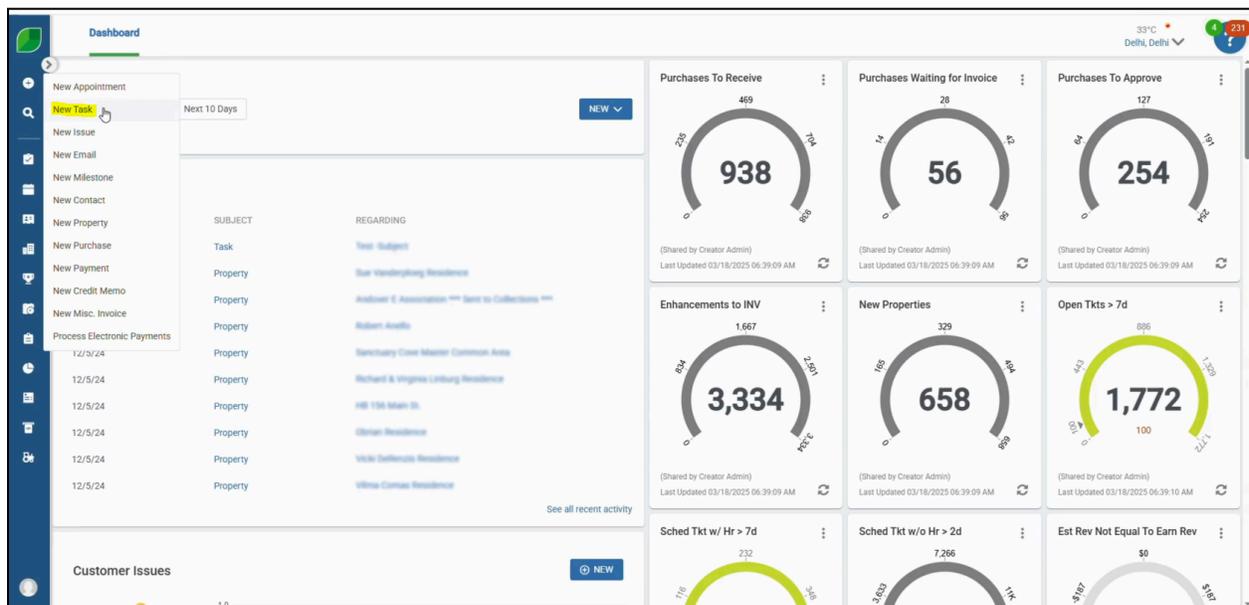
Creating Tasks in Aspire

Effectively managing tasks in Aspire helps streamline workflows and ensure important activities are completed efficiently. This job aid provides step-by-step instructions on how to create and track tasks in Aspire.

Steps to Create a Task in Aspire:

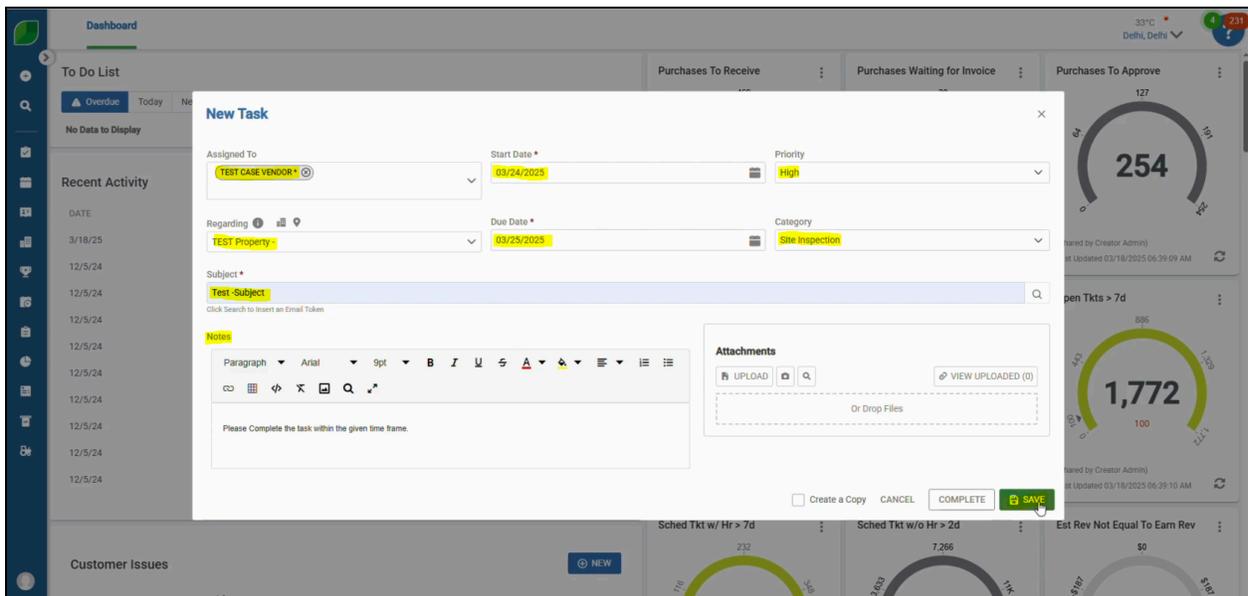
1. Log in to Aspire

- Access your Aspire account.
- Navigate to the Tasks section from the Quick Menu.



2. Add a New Task

- Select the contact in the "Assigned To" field.
- Choose the "Regarding" option from the dropdown menu.
- Select the Start Date and Due Date for the task.
- Choose the Priority and Category of the task.
- Enter a Subject for the task.
- Add a note if necessary.
- Click "Save" to finalize the task. The task is now saved successfully.



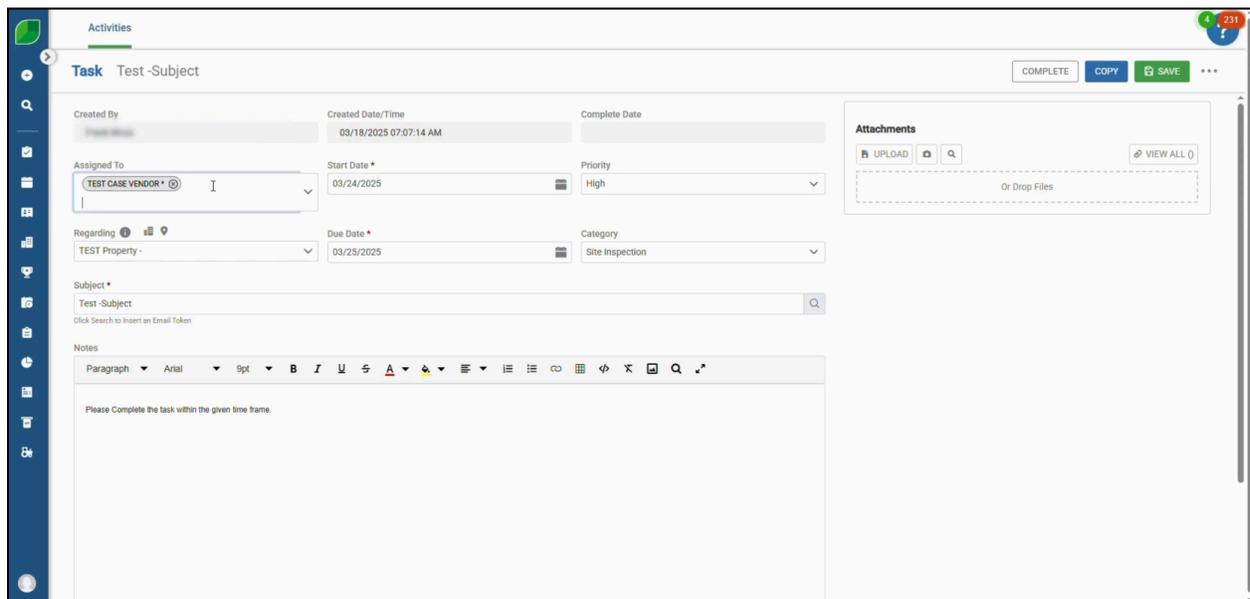
3. Manage and Complete Tasks

Return to the Aspire dashboard and navigate to the "Activities" section to find created tasks.

- Go to the "Activities" section.

Use the search function to locate the task by entering its "Regarding" details. This will display the task for tracking and management.

- Select the newly added task.
- Click "Save" to update the task status.



The screenshot displays the 'Activities' section of the Aspire dashboard. The main heading is 'Task Test -Subject'. At the top right, there are buttons for 'COMPLETE', 'COPY', 'SAVE', and a menu icon. The form includes several fields: 'Created By' (placeholder: Please Select), 'Created Date/Time' (03/18/2025 07:07:14 AM), 'Complete Date' (empty), 'Assigned To' (dropdown menu showing 'TEST CASE VENDOR'), 'Start Date' (03/24/2025), 'Priority' (High), 'Regarding' (TEST Property -), 'Due Date' (03/25/2025), and 'Category' (Site Inspection). There is also a 'Subject' field with 'Test -Subject' and a search icon. Below the form is a 'Notes' section with a rich text editor containing the text 'Please Complete the task within the given time frame.' On the right side, there is an 'Attachments' section with 'UPLOAD', 'VIEW ALL (0)', and 'Or Drop Files' options. A vertical sidebar on the left contains various navigation icons. The top right corner shows a notification badge with the number '231'.

Managing and Completing Tasks:

- Tasks will remain on your To-Do List until marked as complete.
- Completed tasks stay linked to their associated records for tracking purposes.
- Use dashboard views to monitor and manage tasks efficiently.

Effectively utilizing tasks in Aspire helps maintain organized workflows and ensures timely completion of internal activities. Following these steps will enhance task management within your organization.