

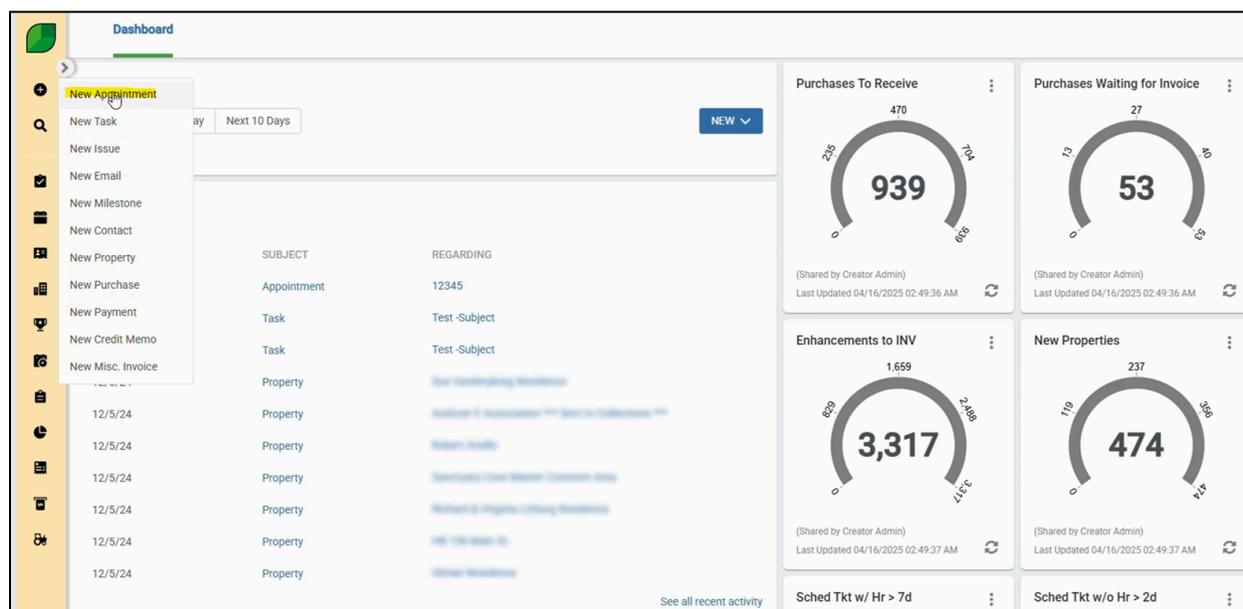
# Creating an Appointment in Aspire

Appointments in Aspire help organize communication and task management, especially when handling accounts receivable. By scheduling clear and timely meetings with relevant stakeholders, you ensure better follow-ups, accountability, and workflow efficiency. This job aid walks you through the simple steps to create an appointment within Aspire.

## Steps to Create a New Appointment in Aspire

### 1. Click on the Plus Icon on the Aspire Dashboard and Select New Appointment

- Navigate to the main dashboard.  
Click on the “+” icon.
- Select **New Appointment** from the dropdown menu.



The screenshot displays the Aspire Dashboard interface. On the left side, a vertical navigation bar contains a plus icon (+) which has been clicked, opening a dropdown menu. The menu items are: New Appointment (highlighted in yellow), New Task, New Issue, New Email, New Milestone, New Contact, New Property, New Purchase, New Payment, New Credit Memo, and New Misc. Invoice. The main dashboard area shows a table with columns for SUBJECT and REGARDING, and a list of recent activity. On the right side, there are four circular gauges representing key metrics: Purchases To Receive (939), Purchases Waiting for Invoice (53), Enhancements to INV (3,317), and New Properties (474). Each gauge includes a numerical value, a range, and a refresh icon.

SUBJECT	REGARDING
Appointment	12345
Task	Test -Subject
Task	Test -Subject
Property	Test -Subject

Metric	Value
Purchases To Receive	939
Purchases Waiting for Invoice	53
Enhancements to INV	3,317
New Properties	474

## 2. Enter What It's 'Regarding' and Add Attendees

- Fill in the **Regarding** field to specify the appointment's purpose.
- Add relevant **Attendees** to ensure appropriate involvement.

The screenshot shows the 'New Appointment' form in a CRM system. The form is titled 'New Appointment' and has a close button (X) in the top right corner. It includes a 'Private Appointment' checkbox. The 'Attendees' field is a dropdown menu with a list of contacts. The 'Regarding' field is a dropdown menu with a list of subjects. The 'Start Date' and 'End Date' fields are set to 04/17/2025 12:00 PM and 04/17/2025 01:00 PM respectively. The 'Location' field is empty. The form includes a 'Subject' field with a search icon and a 'Notes' field with a rich text editor. The background shows a dashboard with a 'To Do List' and 'Recent Activity' section.

## 3. Enter Start and End Dates

- Set the **Start Date** and **End Date** for the appointment.
- Ensure the timeframe reflects the actual meeting or task duration.

The screenshot shows the 'New Appointment' form in a CRM system. The form is titled 'New Appointment' and has a close button (X) in the top right corner. It includes a 'Private Appointment' checkbox. The 'Attendees' field is a dropdown menu with a list of contacts. The 'Regarding' field is a dropdown menu with a list of subjects. The 'Start Date' and 'End Date' fields are set to 04/18/2025 12:00 PM and 04/18/2025 01:00 PM respectively. The 'Location' field is empty. The form includes a 'Subject' field with a search icon and a 'Notes' field with a rich text editor. The background shows a dashboard with a 'To Do List' and 'Recent Activity' section.

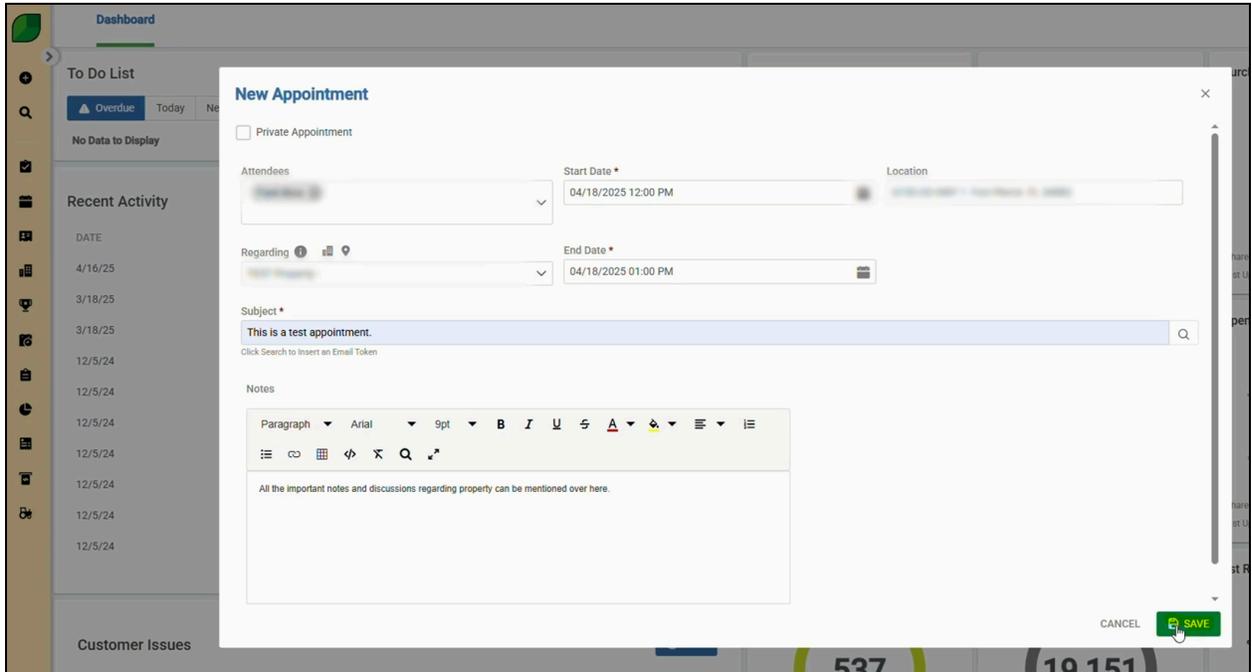
#### 4. Enter the Subject Line and Then Write Notes

- Type a clear **Subject Line** summarizing the appointment.
- Use the **Notes** section for important details or discussion points.

The screenshot shows a 'New Appointment' form in a CRM system. The form is titled 'New Appointment' and has a close button (X) in the top right corner. It includes a 'Private Appointment' checkbox. The form has several input fields: 'Attendees' (a dropdown menu), 'Start Date \*' (04/18/2025 12:00 PM), 'Location' (a dropdown menu), 'Regarding' (a dropdown menu), and 'End Date \*' (04/18/2025 01:00 PM). Below these fields is a 'Subject \*' field containing the text 'This is a test appointment.' and a search icon. Below the subject field is a 'Notes' section with a rich text editor toolbar and a text area containing the text 'All the important notes and discussions regarding property can be mentioned over here|'. At the bottom right of the form are 'CANCEL' and 'SAVE' buttons. The background shows a dashboard with a 'To Do List' and 'Recent Activity' section.

## 5. Click on Save

- Review all filled fields.
- Click **Save** to finalize and schedule the appointment.



The screenshot shows a 'New Appointment' form within a software interface. The form is titled 'New Appointment' and includes a checkbox for 'Private Appointment'. The form fields are as follows:

- Attendees:** A dropdown menu with a blurred selection.
- Start Date \*:** A date and time field set to '04/18/2025 12:00 PM'.
- Location:** A text field with a blurred address.
- Regarding:** A dropdown menu with a blurred selection.
- End Date \*:** A date and time field set to '04/18/2025 01:00 PM'.
- Subject \*:** A text field containing 'This is a test appointment.' with a search icon on the right.
- Notes:** A rich text editor with a toolbar (Paragraph, Arial, 9pt, Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List) and a text area containing the placeholder text: 'All the important notes and discussions regarding property can be mentioned over here.'

At the bottom right of the form, there are two buttons: 'CANCEL' and a green 'SAVE' button with a white checkmark icon. A mouse cursor is hovering over the 'SAVE' button.

Creating appointments in Aspire ensures proper scheduling and documentation for accounts receivable activities. Following these simple steps helps maintain clarity, improve collaboration, and keep important financial tasks on track.