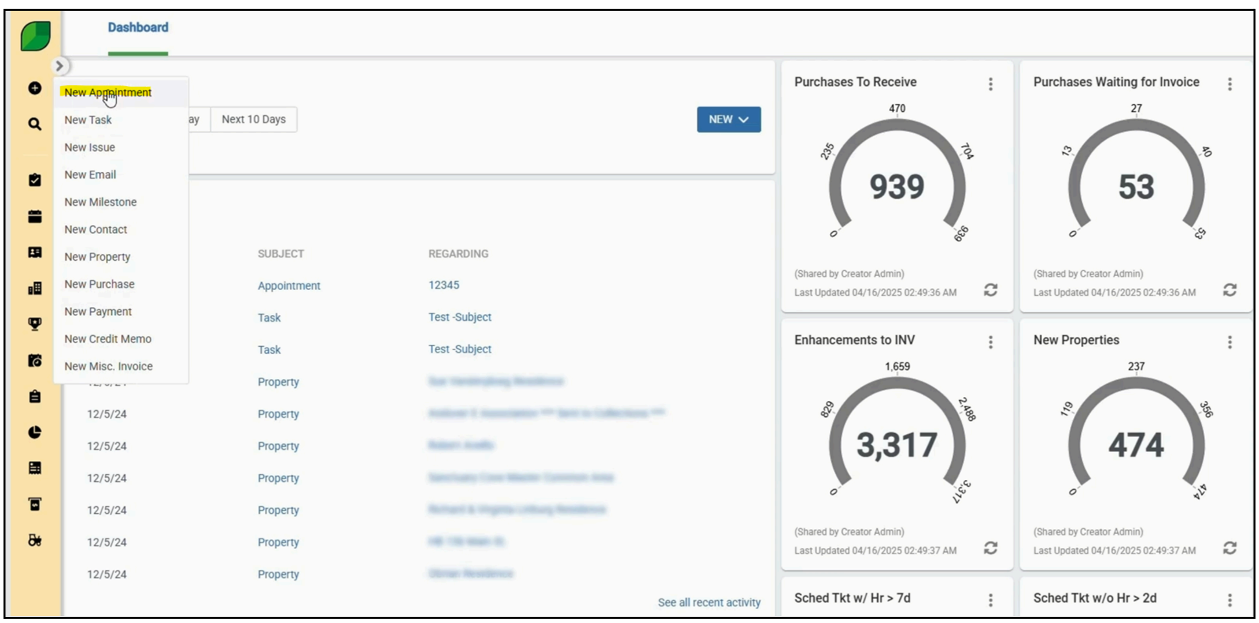
Creating an Appointment in Aspire

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

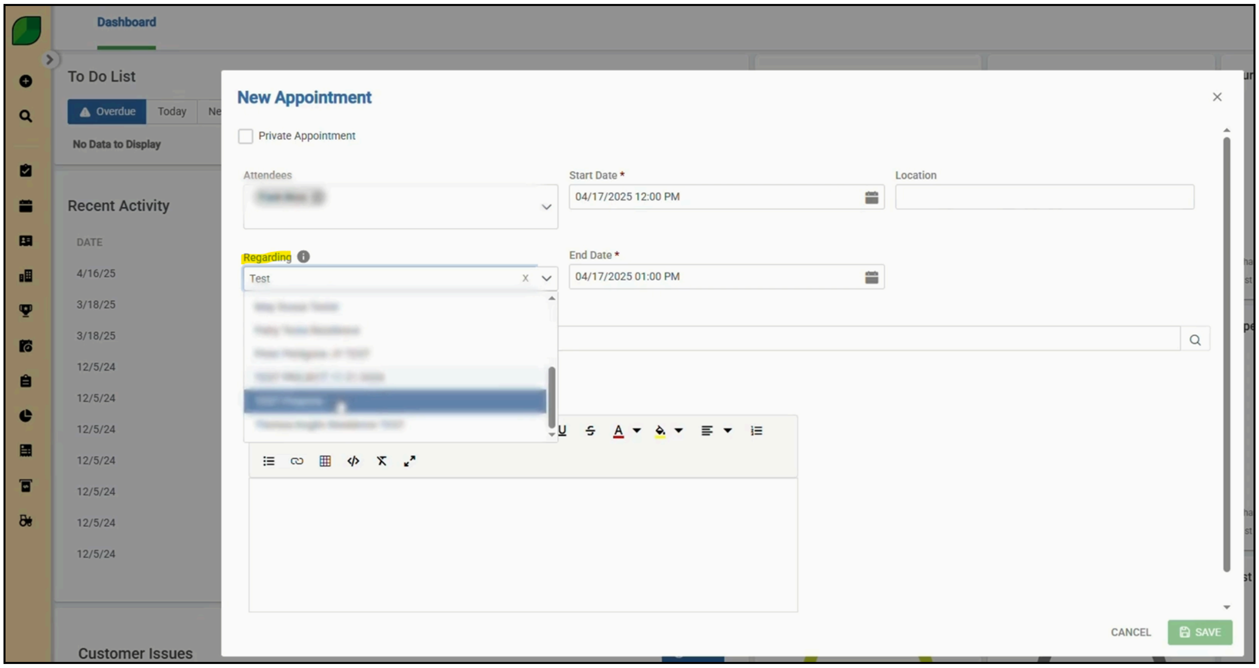
1. Click on the Plus Icon on the Aspire Dashboard and Select New Appointment

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



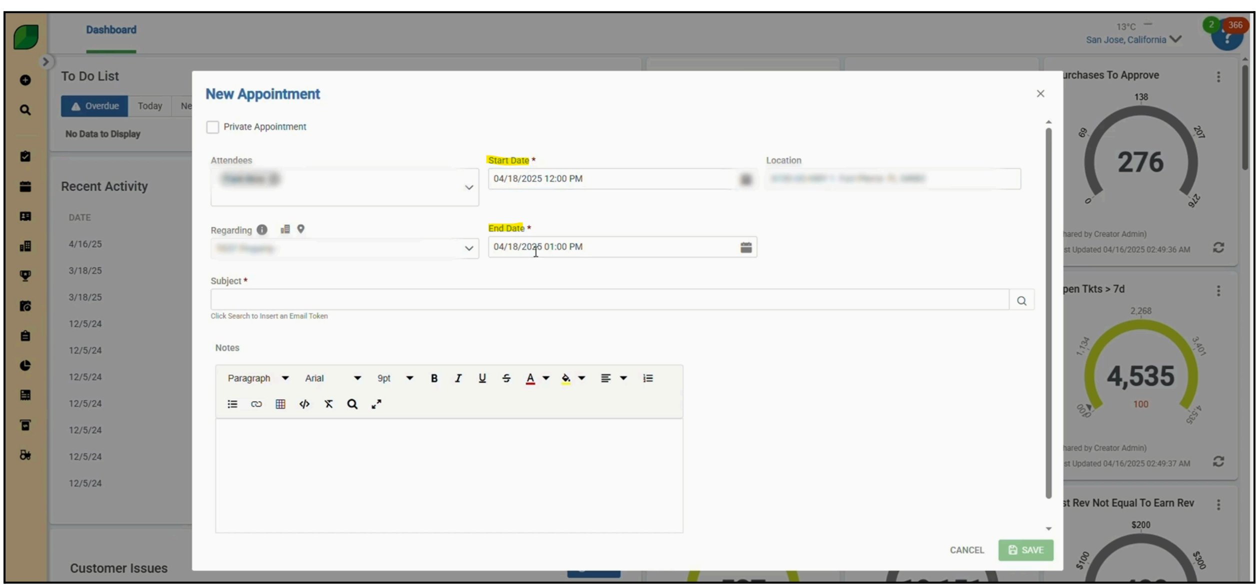
2. Enter What It's 'Regarding' and Add Attendees

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



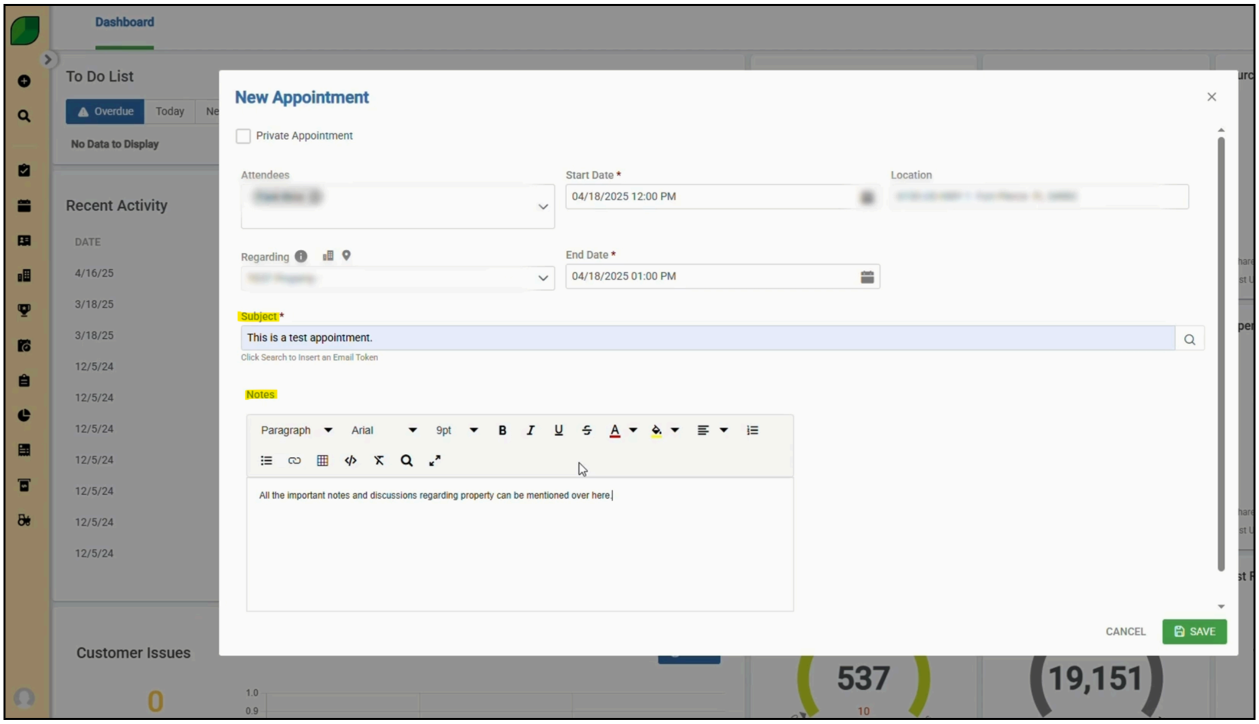
3. Enter Start and End Dates

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



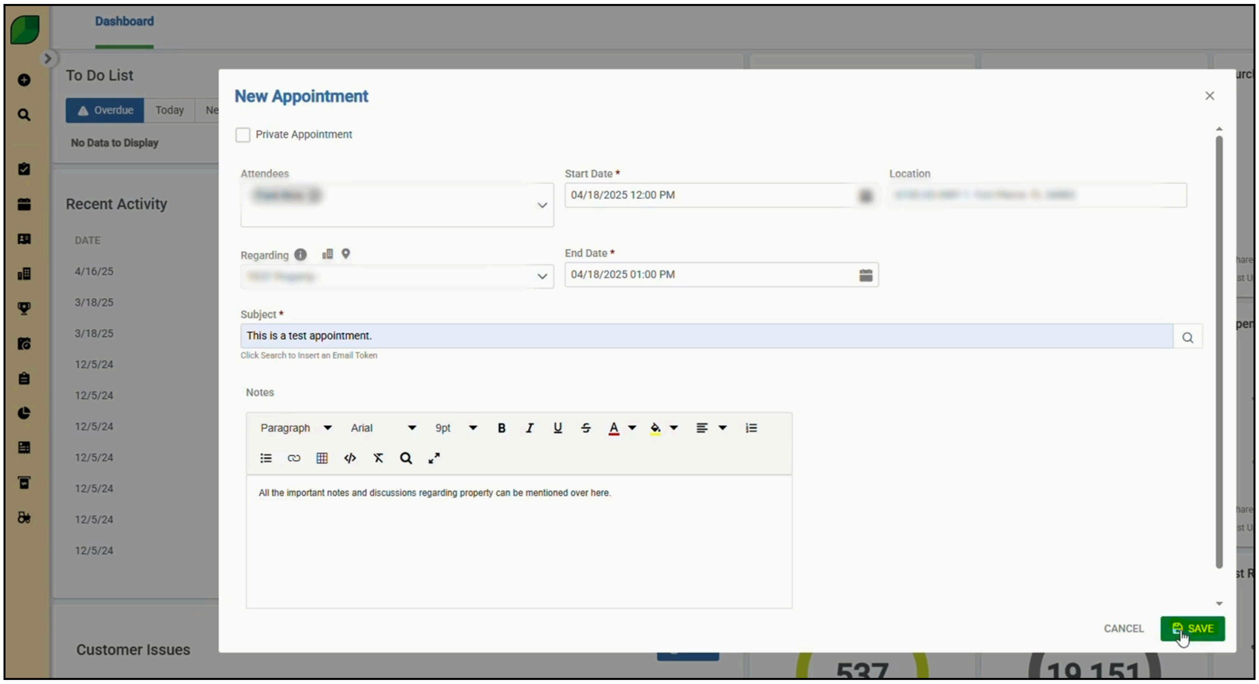
4. Enter the Subject Line and Then Write Notes

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



5. Click on Save

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



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.