

Issues - Creating, Updating, and Completing in Aspire

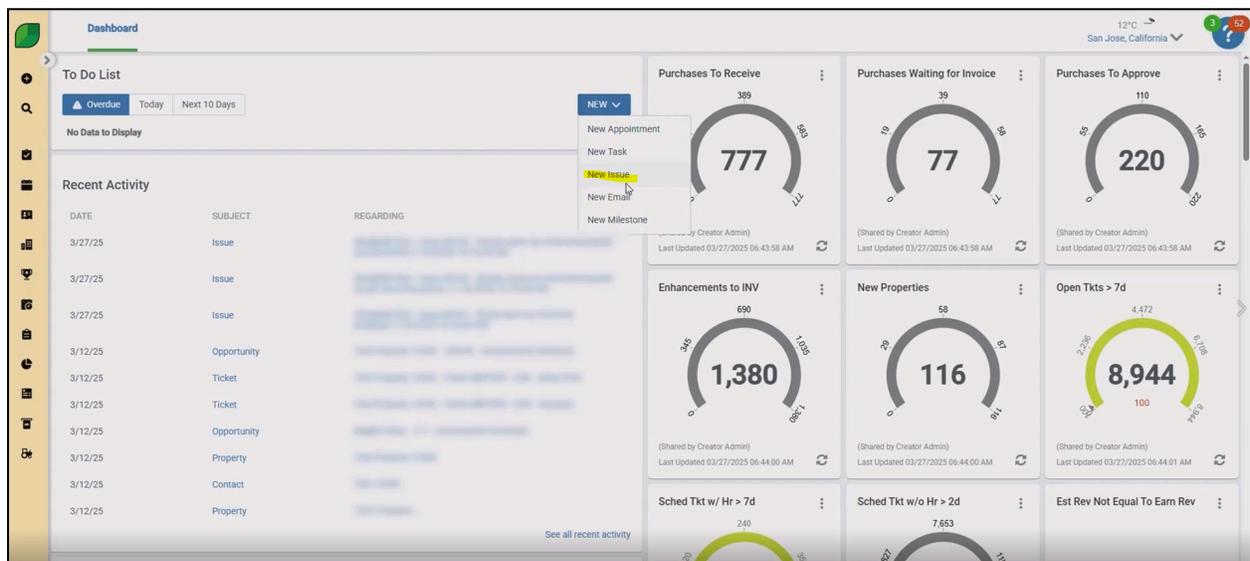
Managing issues efficiently in Aspire is crucial for smooth operations in accounts receivable. This guide outlines the steps to create, update, and complete an issue in the Aspire dashboard. Follow these instructions to ensure accurate issue tracking and resolution.

Creating an Issue

Issues in Aspire allow for efficient tracking and resolution. Below are the steps to create a new issue in the system:

1. Access Your Dashboard and Click on "New"

- Log in to your Aspire account.
- Navigate to the dashboard where you can manage issues.
- In the Aspire dashboard, click on the "New" button.
- Select **"New Issue"** from the dropdown menu to begin creating an issue.



2. Mention Assigned To, then Set Priority and Mention Due Date

- Specify the person responsible for handling the issue.
- Choose the priority level for the issue (e.g., High, Medium, Low).
- Enter the deadline by which the issue should be resolved.

The screenshot shows a 'New Issue' form in a dashboard. The form is partially filled out. The 'Assigned To' field is set to 'Test 12345'. The 'Priority' is set to 'High'. The 'Due Date' is set to '03/31/2025'. The 'Regarding' field is empty. The 'Category' is set to 'Complaint'. The 'Opportunity' field is set to 'Create New Opportunity...'. The 'Subject' field is empty. The 'Notes' field is empty. The 'Attachments' section is empty. The form has a 'SAVE' button at the bottom right.

3. Add What the Issue is Regarding, Select Category and Mention Opportunity (if applicable)

- Provide relevant details about the issue to ensure clarity.
- Choose a category for the issue (e.g., "Complaint").
- If applicable, select **"Create New Opportunity"** to associate the issue with an opportunity.

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4. Enter Subject

- Provide a clear and concise subject for the issue.
- If client inclusion is needed, check the box at the top of the form.

The screenshot shows the 'New Issue' form in the Aspire system. The form is open over a dashboard background. The 'Include Client' checkbox is checked. The 'Assigned To' field contains 'Test 12345'. The 'Priority' is set to 'High' and the 'Due Date' is '03/31/2025'. The 'Regarding' field is empty, 'Category' is 'Complaint', and 'Opportunity' is 'Create New Opportunity...'. The 'Subject' field contains the text 'Shrubs were not trimmed properly as instructed.' Below the subject field is a rich text editor for 'Notes' and an 'Attachments' section with an 'UPLOAD' button and a 'VIEW UPLOADED (0)' button. At the bottom right of the form are buttons for 'Create a Copy', 'CANCEL', 'PRINT', 'COMPLETE', and 'SAVE'.

5. Click Save

- After filling out all the necessary information, click **Save** to log the issue into the system.
- Review the issue created on the dashboard.

This screenshot is identical to the previous one, showing the 'New Issue' form. The only difference is that a mouse cursor is now hovering over the 'SAVE' button at the bottom right of the form, indicating the final step of the process.

By following these steps, you can efficiently create, update, and complete issues in Aspire. Proper issue management helps maintain accuracy in accounts receivable, ensuring seamless workflow and improved resolution tracking.