

Purchasing Assistant – Missing Items

Purpose:


When creating an estimate for an opportunity, planned services are added, under which the amount and cost of labor and items are added. Once an estimate is completed and the opportunity has been won, the items needing to be purchased become available in the *Purchasing Assistant*. Aspire has been designed to automatically calculate the relevant sales tax for these items to appear on the client facing invoice. This calculation is based upon the tax jurisdiction associated with the property where the opportunity is to occur. If a tax jurisdiction has not been associated with the property, the items will not appear in the *Purchasing Assistant*, proving problematic when attempting to create a purchase receipt.

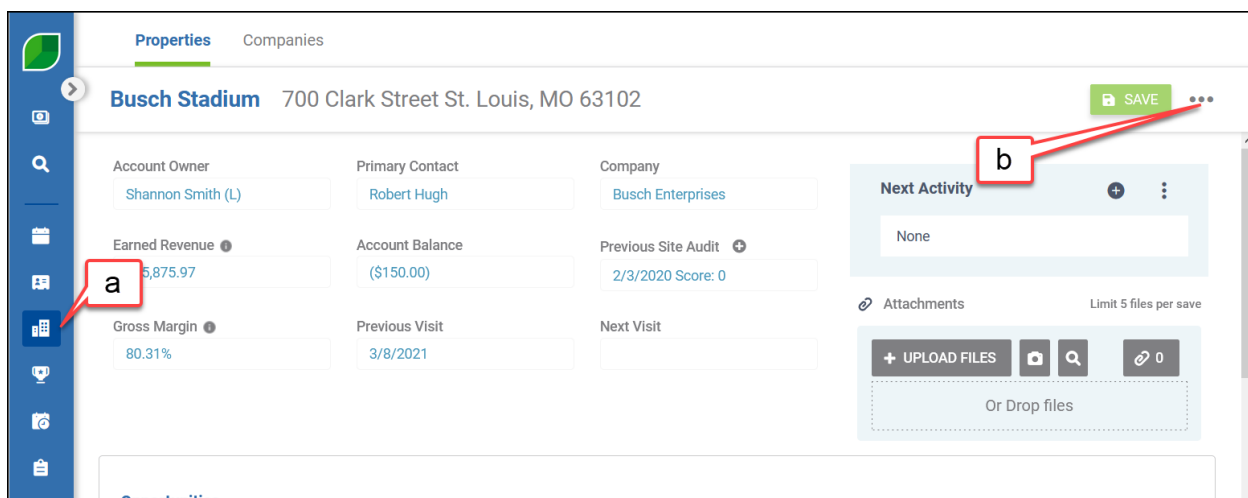
Principle to Follow

- Always associate a tax jurisdiction, when creating a new property.

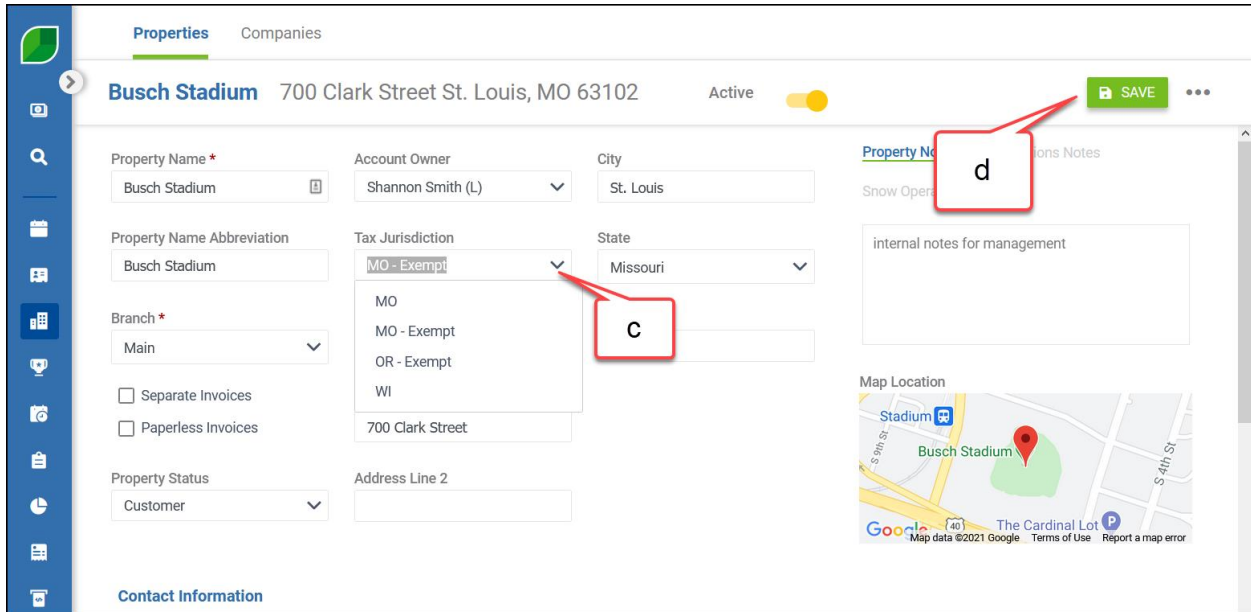
Steps

Follow the steps below to associate a tax jurisdiction with an existing property.

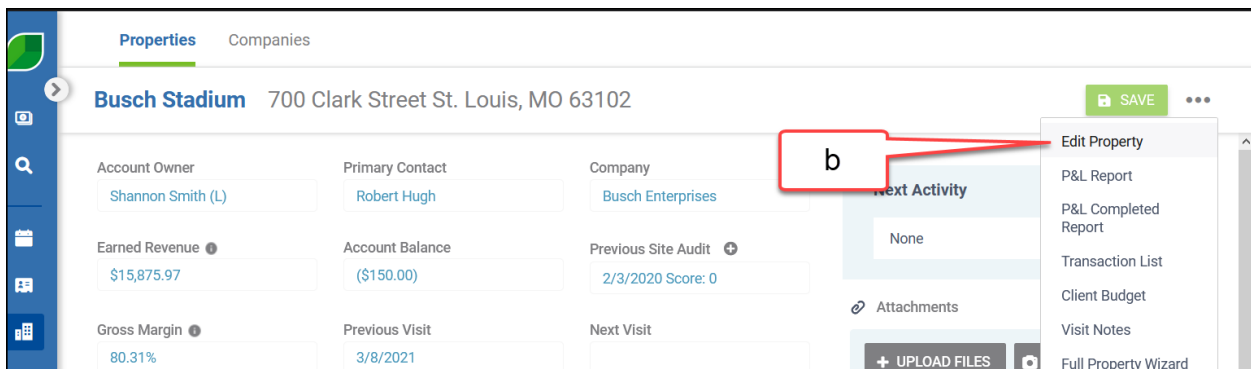
1. Click the *Properties*  icon^a in the *Aspire Navigation Bar* at the left side of the screen.
2. Select the property.
3. Click on the 3-dot menu then select edit property at the top right corner of the screen^b.



4. Select the appropriate tax jurisdiction^c. If the appropriate tax jurisdiction is not listed, it will need to be set up in *Administration*. Instructions for this process are available on the AspireCare Knowledge Base [Sales Tax Setup in Aspire](#).



5. Click the *Save* at the top right corner of the screen^d.



6. Items should now populate in *Purchasing Assistant*.

Using this approach will

- Allow items to populate in the *Purchasing Assistant*, enabling the creation of a purchase receipt based on selection of those items.