How to enter A/R Collections Notes in Aspire

Purpose:

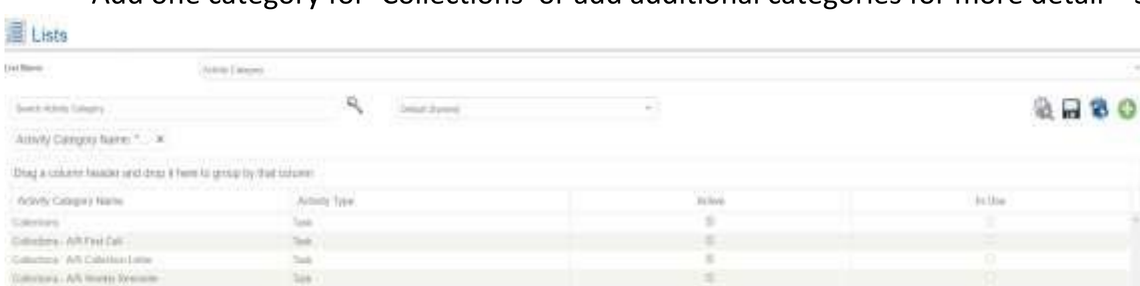
To track collection activities in Aspire, create a Task in Aspire at the property level.

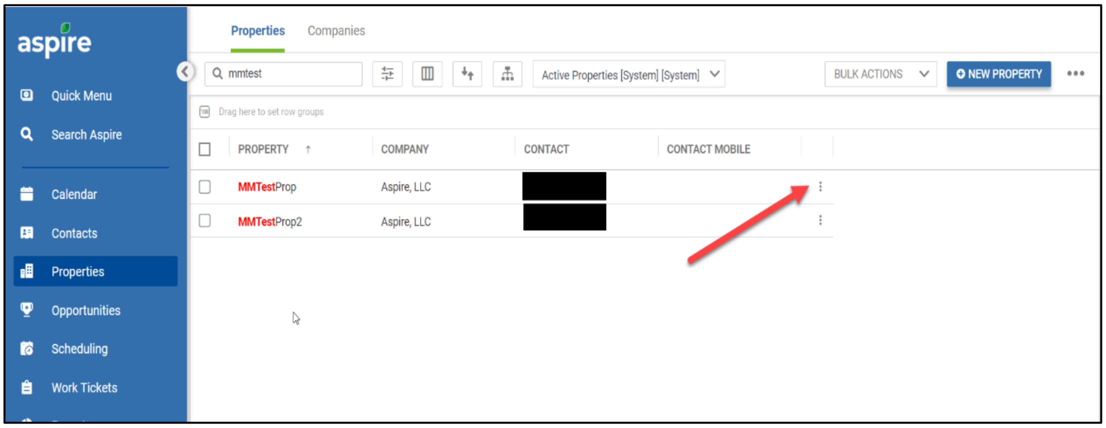
Procedures:

1 – Create an Activity Category for ‘Collections’. Add one Category for ‘Collections’ or add additional categories for more detail.

- Put your cursor over your name on the top right & choose ‘Administration’. Go to Manage Lists.

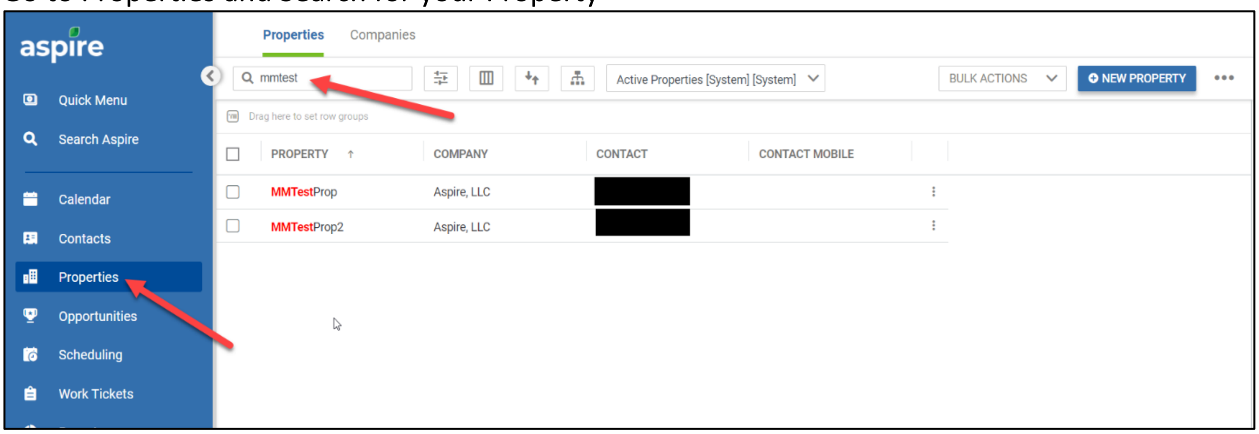
- Choose ‘Activity Category’
- Click the Green plus sign on the top right to add a new Category
- Type in the Activity Category Name & the Activity type ‘Task’
- Add one category for ‘Collections’ or add additional categories for more detail • Save





2 – To create the Collections Task in Aspire

- Go to Properties and Search for your Property

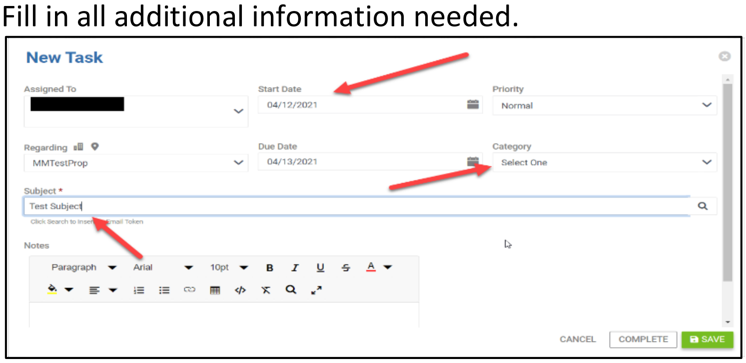


- Click the Kebab to create a task

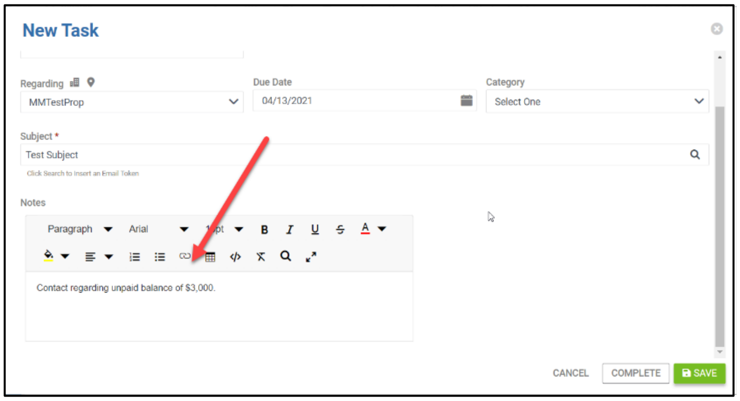
At Category, choose the Collection category applicable.

Start Date and End Date should be the date of the collection note or phone call.

Fill in all additional information needed.

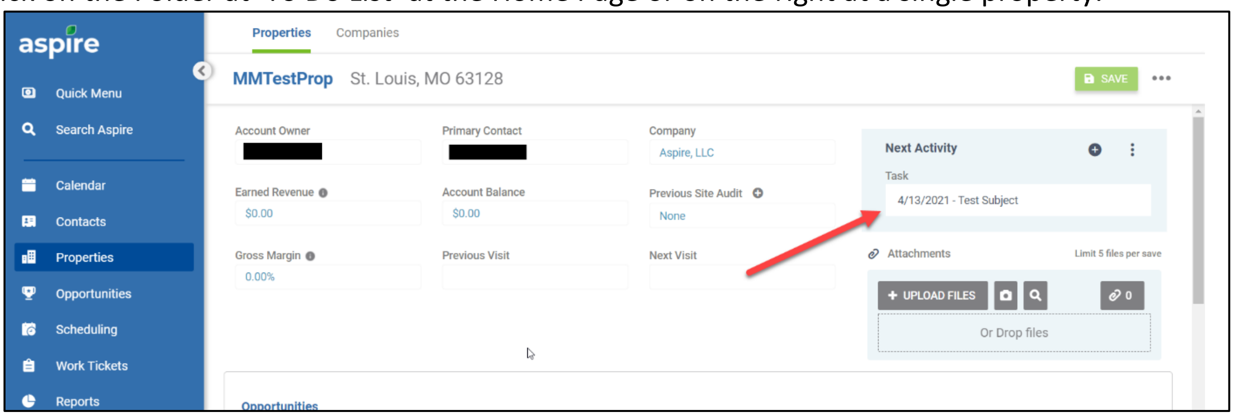


Click into the box for notes. It will take you to the notes screen. Type in notes regarding collection call, email… Click save on bottom right.

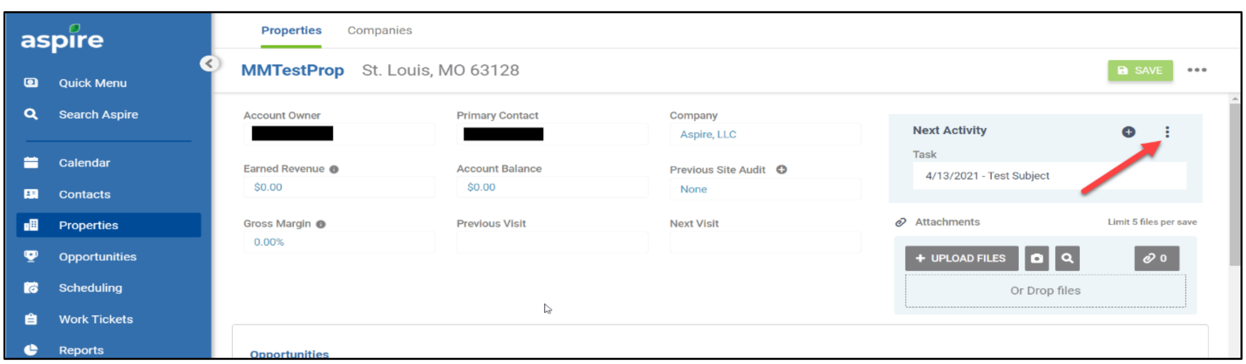


3- How to create a list for Collection

In Aspire, go to the Home Page to see all Collection notes or go to a single property.
Click on the Folder at 'To Do List' at the Home Page or on the right at a single property.

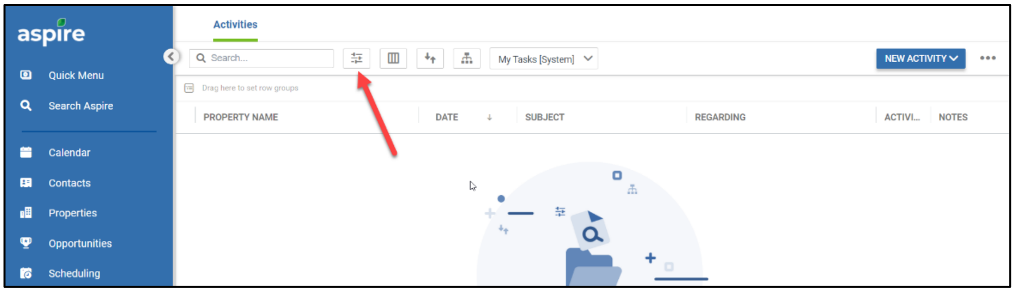


Click into the kebab icon and more activites



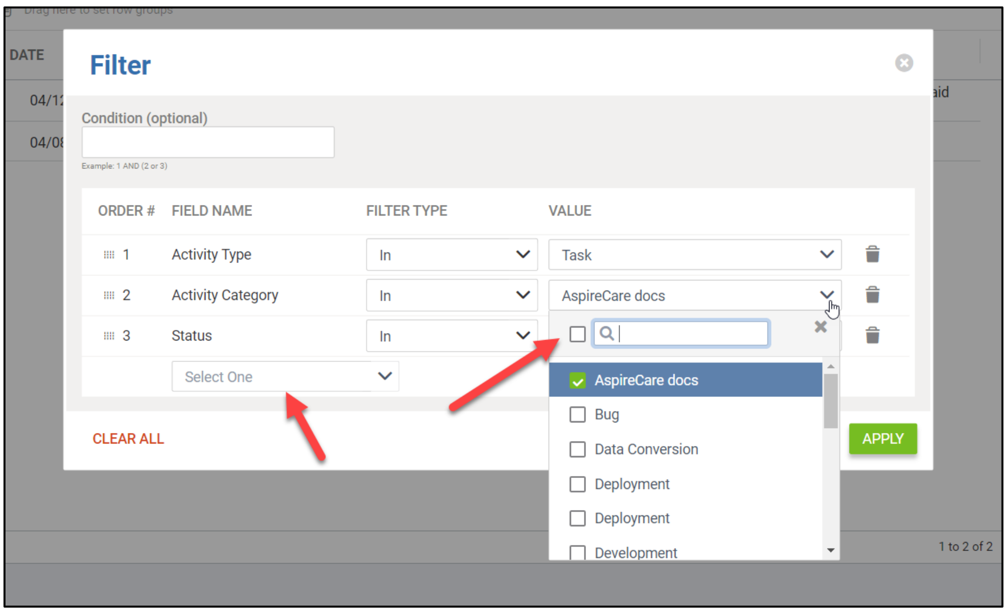
Add Filters:

1. Select Filters near the search bar

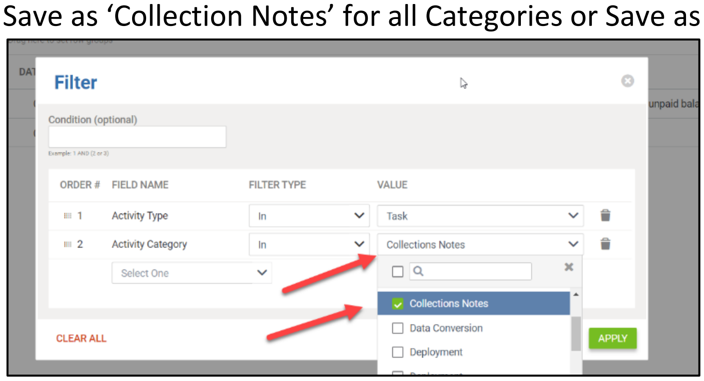


2. Activity – In – Task
3. Activity Category – in – Choose one or all of the Collection Categories
4. Status – In – Open, Completed (add Completed to see completed tasks)

Add Display to: (or any other displays you need)



Save as 'Collection Notes' for all Categories or Save as for each Category



This list will show

This list will not be available at the Home page, but at a property when you click into the folder.