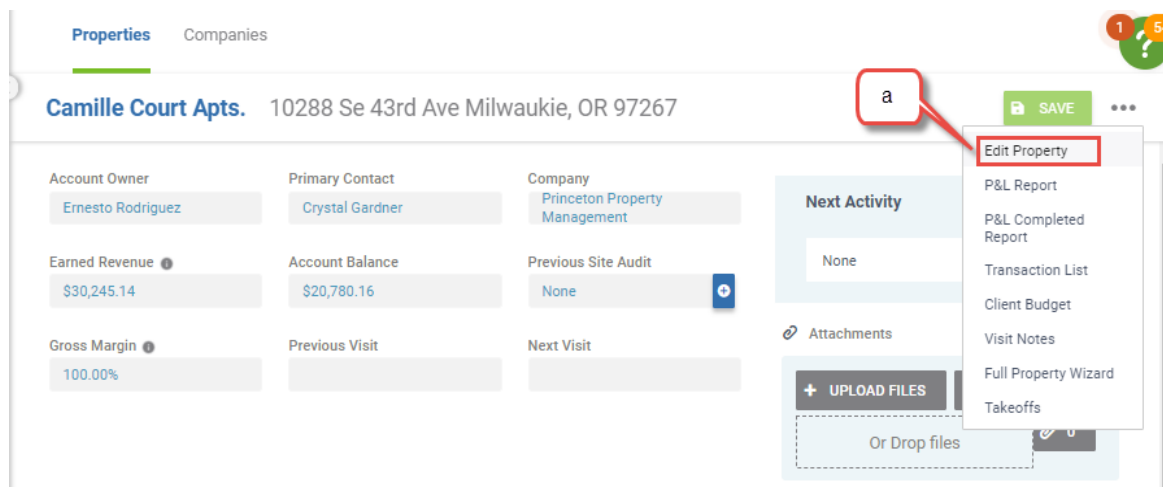


## Collection Notes in Aspire

Aspire has many different places that you can enter Collection Notes and review them. This document shows where you can enter notes and view them.

### Places to enter Collection Notes

There are three areas you can enter collection notes: Property, Payment and Receivables list. Let's look at the first option by going to a Property, we can enter a collection note through the triple dot menu on the right hand side of the Property Overview screen. Select the Edit Property option<sup>a</sup> and on the right hand side there is a text box to enter any notes you need for collections.



Payment Screen has a new section within the Notes area on the right hand side for Collection Notes<sup>b</sup>. You can select which Property associated with the account selected for the Payment to add the Collection Notes to<sup>c</sup>.

## Payment

[SAVE](#)

Company: Coca Cola   
 Regarding: Property or Opport   
 Payment Methods: Check   
 Reference #:   
 Contact: Select One   
 Branch: Select One   
 Payment Date: 11/9/2021

### Invoices

<input type="checkbox"/>	PREFIX ▾	INVOICE # ▾	DESCRIPTION
<input type="checkbox"/>	A	15482	Art Gallery Office - #6331 - Landscape Maintenance Agree
<input type="checkbox"/>		15571	Coca Cola - #6397 - Landscape Maintenance Agreement -Bra
<input type="checkbox"/>		15586	Coca Cola - #6447 - Landscape Maintenance Agreement Apri
<input type="checkbox"/>		15623	Coca Cola - #6396 - Landscape Maintenance Agreement RE
<input type="checkbox"/>		15625	Coca Cola - #6447 - Landscape Maintenance Agreement Aug
<input type="checkbox"/>		15804	Coca Cola - #6249 - Mor Barber School of Higher Learning
<input type="checkbox"/>		5902	Coca Cola - #6196 - Landscape Maintenance Agreement Octo
<input type="checkbox"/>		15615	Coca Cola (Invoice Testing) - #6499 - Tree Removal

### Payment Summary

Invoices Selected	\$0.00
Fees	\$0.00
Credits	\$0.00

P T \$0.00

Payment Notes

[Collection Notes](#)

Art Gallery Office ▾

On the Receivables list you can add Collection Notes as a display to the list and not only review the notes, but add to them.

Invoicing Assistant Invoice Batches Invoices **Receivables** Payments Deposits Log Event Electronic Payment Log

Open Balance [System]

Balance: 0

Drag here to set row groups

<input type="checkbox"/>	COMPANY	1 ↑	PROPERTY	2 ↑	BILLING CONTACT	3 ↑	BALANCE	PROPERTY COLLECTION ...
Totals							\$264,239.58	
<input type="checkbox"/>	Marion Apartments		Marion Apartments		Samantha Smith		\$15,442.81	
<input type="checkbox"/>	Marlu Group		Arby's 122nd & Halsey		Billing Arby's 122nd		\$1,093.45	
<input type="checkbox"/>	Marlu Group		Arby's Cedar Hills 6286		Billing Arby's Cedar Hills 6286		\$2,434.78	
<input type="checkbox"/>	Marlu Group		Arby's Corvallis 1879		Billing Arby's Corvallis 1879		\$2,786.22	
<input type="checkbox"/>	Marlu Group		Arby's Gresham 1488		Billing Arby's Gresham 1488		\$1,556.25	
<input type="checkbox"/>	Marlu Group		Arby's Keizer 1901		Billing Arby's Keizer 1901		\$2,183.80	
<input type="checkbox"/>	PacWest Energy		Pacwest 623 Bed- 2903 78th Ave SE		Pacwest Energy Jacksons Food -WA Pacwest #623		\$3,300.00	
<input type="checkbox"/>	Princeton Property Management		Camille Court Apts.				\$20,780.16	Property Collection Notes
<input type="checkbox"/>	Revelstoke Resort		Revelstoke		Revelstoke Resort		\$19,780.01	

## Where I can view Collection Notes

Property list has a display field available for Collection Notes<sup>e</sup>. It will include notes that were added directly to the Property as well as from Payments that were designated for the particular property.

Properties Companies

Search... Active Properties [System]

Active: YES

Drag here to set row groups

	PROPERTY	COMPANY	CONTACT	CONTACT MOBILE	COLLECTION NOTES
<input type="checkbox"/>	Burnside Firs Apartments	Pinewood Station LLC	Fred Sanders		
<input type="checkbox"/>	Burntbridge Condo	Key Properties	Steve Mejia		
<input type="checkbox"/>	Bybee Blvd. Max Station	TriMet	Justin Hale		
<input type="checkbox"/>	Caldera at Sunnybrook	Affinity Property Management	Jessica Lovegren		
<input type="checkbox"/>	Camelia Court Apartments	Home Forward	Tracy Alioth		Property Collection Notes
<input type="checkbox"/>	Camille Court Apts.	Princeton Property Management	Crystal Gardner		Property Collection Notes
<input type="checkbox"/>	Camille Estates HOA	Aspire Snow Co.	Cris Poggi	503-802-0747	
<input type="checkbox"/>	Cansler Village Apartments	Pinewood Station LLC	Fred Sanders		

Receivables list has a display field available for Collection Notes<sup>f</sup>. It will add it into the triple dot menu on the right hand side of your Receivables list. If you select the triple dot, you can click on the Collection Notes option and review existing notes and add to them as well. You can filter the list based on the Collection Notes as well by using the filter type of contains.

Invoicing Assistant Invoice Batches Invoices Receivables Payments Deposits Log Event Electronic Payment Log

Search... Open Balance [System]

Balance: 0.00

Drag here to set row groups

	COMPANY	PROPERTY	BILLING CONTACT	BALANCE	PROPERTY COLLECTION ...
<b>Totals</b>				<b>\$264,239.58</b>	
<input type="checkbox"/>	Marion Apartments	Marion Apartments	Samantha Smith	\$15,442.81	
<input type="checkbox"/>	Marlu Group	Arby's 122nd & Halsey	Billing Arby's 122nd	\$1,093.45	
<input type="checkbox"/>	Marlu Group	Arby's Cedar Hills 6286	Billing Arby's Cedar Hills 6286	\$2,434.78	
<input type="checkbox"/>	Marlu Group	Arby's Corvallis 1879	Billing Arby's Corvallis 1879	\$2,786.22	
<input type="checkbox"/>	Marlu Group	Arby's Gresham 1488	Billing Arby's Gresham 1488	\$1,556.25	
<input type="checkbox"/>	Marlu Group	Arby's Keizer 1901	Billing Arby's Keizer 1901	\$2,183.80	
<input type="checkbox"/>	PacWest Energy	Pacwest 623 Bed- 2903 78th Ave SE	Pacwest Energy Jacksons Food -WA Pacwest #623	\$3,300.00	
<input type="checkbox"/>	Princeton Property Management	Camille Court Apts.		\$20,780.16	Property Collection Notes
<input type="checkbox"/>	Revelstoke Resort	Revelstoke	Revelstoke Resort	\$19,780.01	

AR Aging Report will display Collection Notes unders each Property which can be collapsed or expanded to review the notes.

Reports	
FAVORITES	STANDARD REPORTS
Report AR Aging	
2019-2020 T&M Snow Contract	
FPOB Tax Test	
Total	g
Camille Court Apts.	
▼ Collection Notes	
Property Collection Notes	
Unspecified Credit	
Landscape Maintenance Agreement	
Total	

AR Aging Detail Report will also display Collection Notes unders each Property which can be collapsed or expanded to review the notes.

Reports	
FAVORITES	STANDARD REPORTS
Report AR Aging Detail	
6299 - FPOB Tax Test	
Total 6299 - FPOB Tax Test	
Total For Big Canoe	h
Camille Court Apts.	
▼ Collection Notes	Property Collection Notes
Unspecified Credit	
Total Unspecified Credit	