

USING THE CUSTOMER PORTAL

Table of Contents

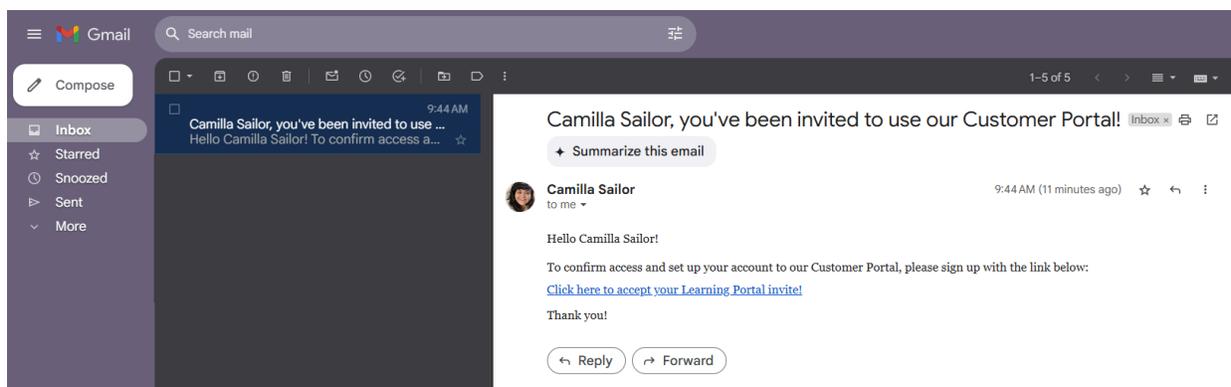
Table of Contents	1
Purpose	2
Receiving an Invite to the Customer Portal	2
Logging Into the Customer Portal	3
Reset Password.....	4
Troubleshooting.....	5
Features of Your Customer Portal	6
Profile Icon Controls	6
Managing Payment Methods.....	6
Adding a Card Payment Method.....	8
Subscribing to Electronic Receipts in the Customer Portal.....	10
Understanding the Customer Portal Side Menu	11
Reviewing the Property Filter.....	11
Current Balance.....	13
Viewing and Signing Proposals	14
Viewing a Proposal.....	14
Signing a Proposal.....	16
The Visits Section	19
Viewing Visits.....	19
Viewing and Paying Invoices	21
Viewing Invoices.....	21
Paying Invoices.....	23
Choose a Payment Amount.....	25
Viewing Requests	27

Purpose

Read this helpful step-by-step to learn about some of the features in the company's portal to help you understand what's available to you as you do business together.

Receiving an Invite to the Customer Portal

Customer Portal Invite links are **valid** for 30 days once they are sent. If 30 days have passed, and you never used your invite link, you'll have to **request** a new *Portal Invitation Email* from the company that **sent** you the portal invite.



When **accepting** the portal invitation in the email, you'll **set** your password and **bookmark** the URL for the Customer Portal, so you can log in whenever you want to review proposals or invoices.

After your password is **set**, you will be redirected to the login page. You can then **log in** to your portal account for the first time.



Sign In

Email Address

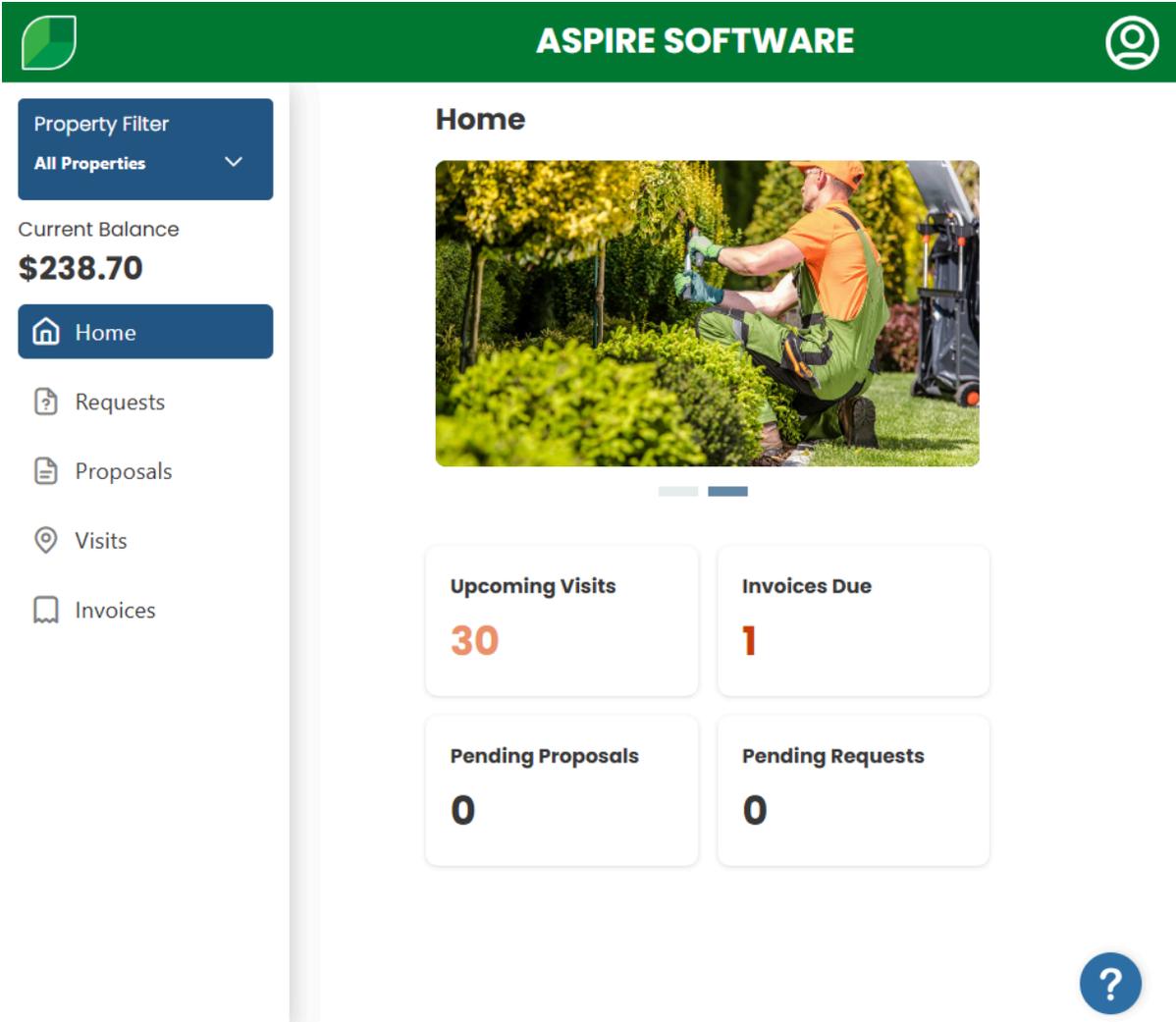
Password

Remember me

[Forgot Password?](#)

Logging Into the Customer Portal

To log into the portal, you will **enter** the email address that you use to communicate with your service provider, and complete with the password that you **created** at the time of sign-up. Once you are logged in, your dashboard will be displayed.



Reset Password

If you cannot remember your password, you can **request** a new password on the login screen by **selecting** *Forgot Password?*

 **Note:** The company that manages your customer portal **cannot see** your passwords; it's up to you to **reset** your password if you do not have access to your old password.



Sign In

Email Address

Password

Sign In

Remember me

[Forgot Password?](#)

Troubleshooting

If you **click** the link to reset your password for your account and you never receive this email, **please check your Spam folder in your email account!** If you cannot find the password reset email, then you can confirm by phone or email to the company you are doing business with to see if you are *Customer Portal Verified*. This means that you have **accepted** your invite to join the customer portal and have set a password.

If you **select** *Forgot Password*, and your email address is not associated with a *User Account* for the *Customer Portal*, you will see *Invalid Email* displayed on the *Customer Portal* screen. You would have to **accept** the initial portal invite *first*, and then, **set** a password.

Features of Your Customer Portal

Once you **accept** your invite to **create** a new account to access the *Customer Portal*, there are many things you can do once you log in.

We will go over the self-serve features that the customer portal offers so you can understand what you can do on your own:

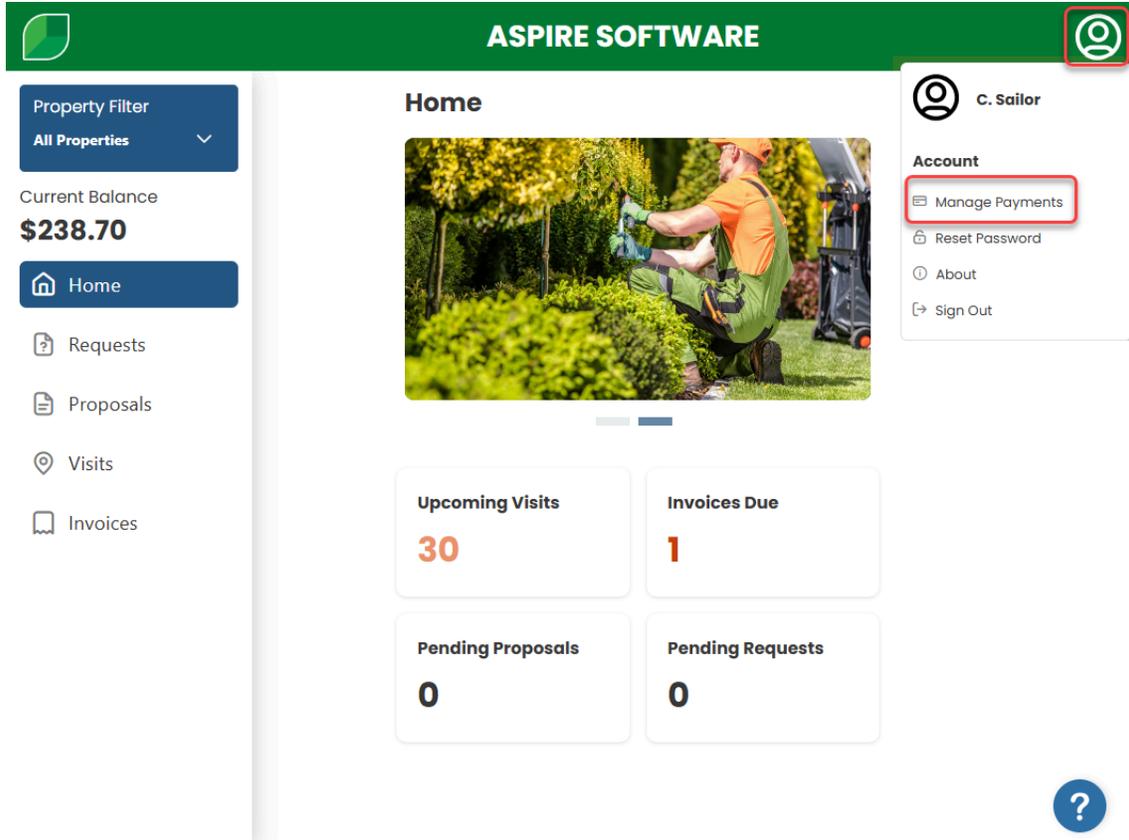
- **Manage** payment methods
- **View** upcoming visits
- **View** and **sign** *Proposals*
- **View** and **pay** *Invoices*
- **Review** and **comment** on *Requests*
- **Manage** multiple properties

Profile Icon Controls

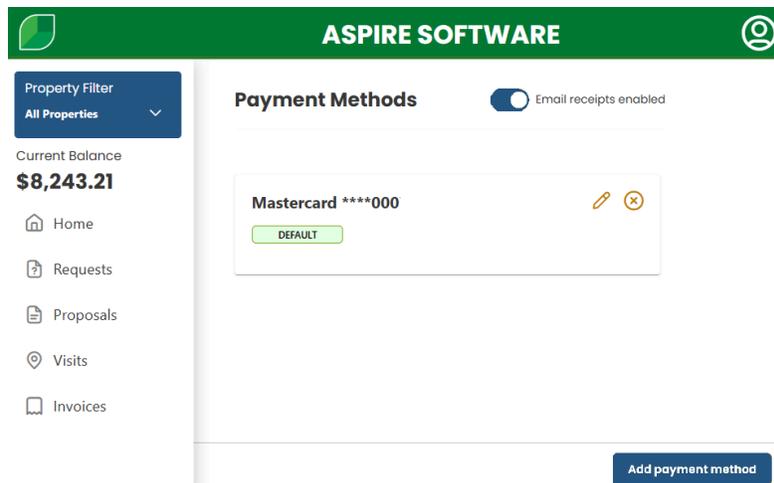
Under the profile icon, you can set payment methods, reset your password for the portal, and sign out of your account.

Managing Payment Methods

You have the option to add a new payment method, edit or delete existing methods, and set a default payment method for your transactions under *Manage Payments*.



Existing payment methods on file for your account will appear here, or you can **click** the *Add Payment Method* button to add a new source.



Adding a Card Payment Method

If you can add Card payments in the *Customer Portal*, you will see the option to add cards to your account and save them for future use!

The screenshot displays the ASPIRE SOFTWARE interface. A modal window titled "Add payment method" is open, showing two options: "Card" and "ACH Transfer". The "Card" option is selected. Under "Card Information", there are three input fields: a card number field containing "1234 1234 1234 1234", a CVV field, and an expiration date field containing "MM/YYYY". Below the fields are three checked checkboxes: "Save payment method", "Make this my default payment method", and "Use default billing address". At the bottom of the modal are "Cancel" and "Save Payment Method" buttons. The background shows a sidebar with "Property Filter", "Current Balance \$8,243.21", and navigation links for Home, Requests, Proposals, Visits, and Invoices.

ACH Payment Method

🧠 If you can add *ACH Transfer* accounts, the *ACH Transfer* option will appear for you to add a source to.

To **add** a new ACH payment method, **select** the *Add Payment Method* button, then under **choose** *ACH Transfer*.

Add payment method

Card ACH Transfer

Account Info

Routing Number/Account Number

Save payment method

Make this my default payment method

Use default billing address

Cancel Save Payment Method

- In the *Routing/Account Number* field, the customer would enter their bank information separating the routing and the account number with a "/".

Account Info

Routing Number/Account Number

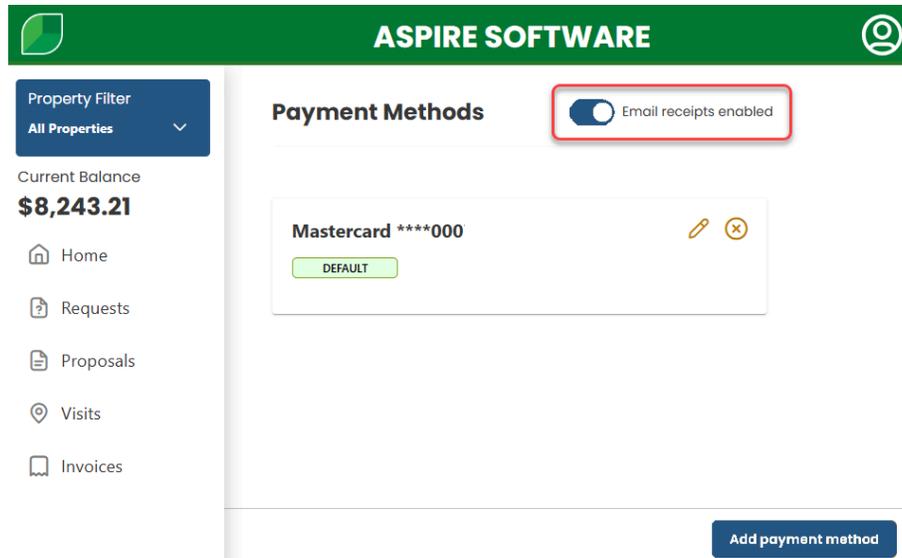
 No spaces or special characters besides "/" should be used in this box.

- After **entering** the bank information, you can decide to make this a default payment method by checking the *Make this my default payment method* checkbox.
- When all information is entered, **select** *Save Payment Method*.

Subscribing to Electronic Receipts in the Customer Portal

Regardless of if you have added *ACH* or *Card* payment methods to your account, you can opt into getting transaction receipts emailed to you when a payment is made.

You can turn the toggle button on to enable emailed payment receipts:



Here is an example email of what you'd **receive** when turning this button on for *Electronic Receipts*:

You are subscribed to Transaction Receipts from Aspire, LLC. Inbox x 

NoReply@youraspire.com
to me ▼



Successfully Subscribed!

This email confirms you have been subscribed to receive Transaction Receipts in Aspire.

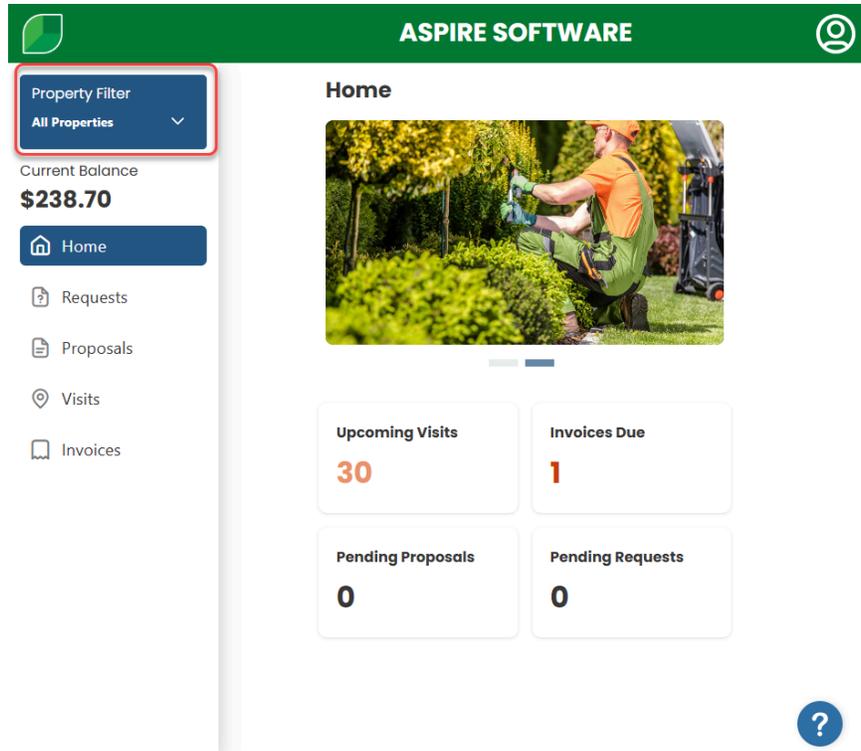
If you feel that you are reaching this message in error please contact your account manager at Aspire, LLC. to update your email preferences.

- Now, when a payment is **made** with the payment source on file, you would automatically get a receipt for the amount paid.

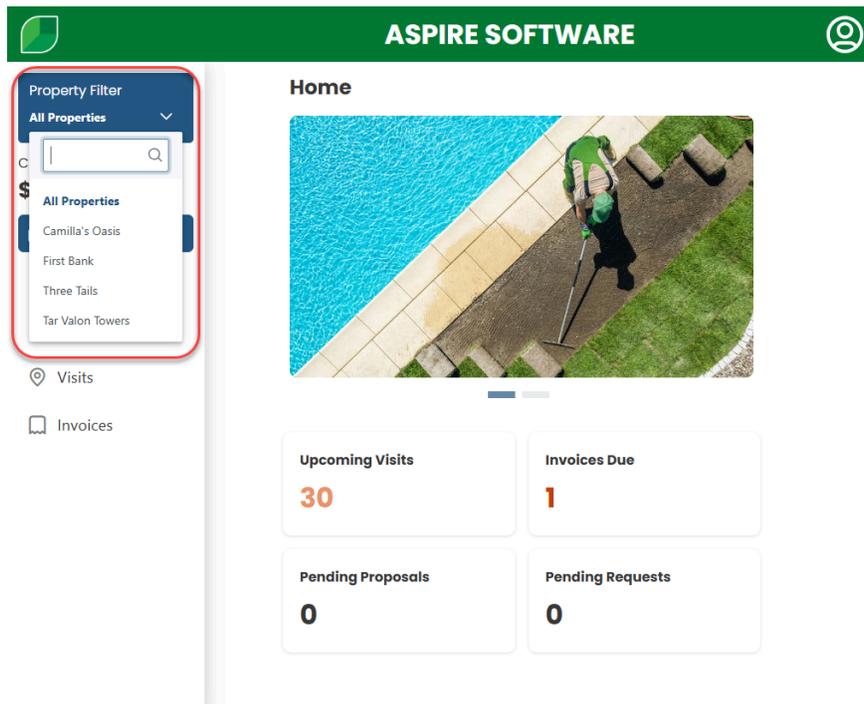
Understanding the Customer Portal Side Menu

Reviewing the Property Filter

The property filter helps you filter portal content and allows you to make the Customer Portal your own! By default, all of your properties will be selected, but if you want to view one property's data, or even a group of properties, you can click the dropdown and select them from the list!

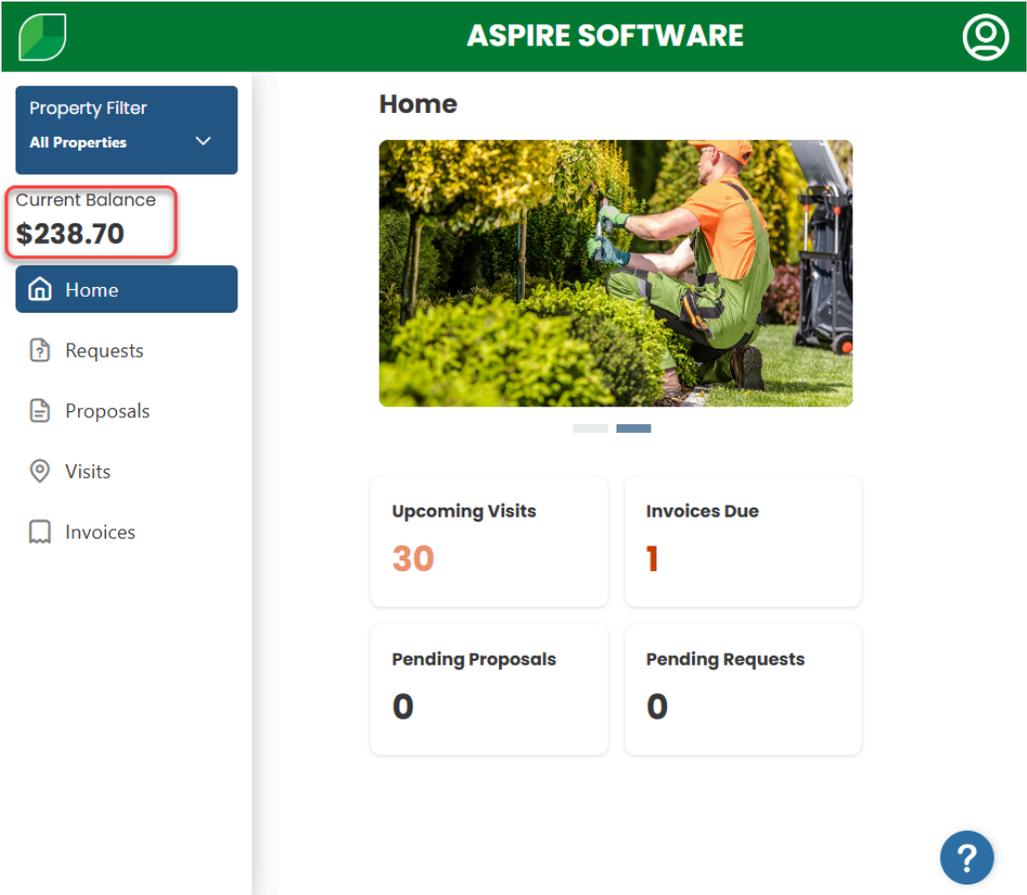


 **Note:** Using the multi-select option updates the data displayed for each property across the entire customer portal.



Current Balance

The current balance amount displays the sum of all due invoices for properties selected by the property filter.



The screenshot shows the ASPIRE SOFTWARE dashboard. At the top, there is a green header with the ASPIRE SOFTWARE logo and a user profile icon. On the left, a sidebar contains navigation options: Property Filter (All Properties), Current Balance (\$238.70), Home, Requests, Proposals, Visits, and Invoices. The main content area is titled 'Home' and features a large image of a worker in an orange shirt and green overalls working on a bush. Below the image are four summary cards: Upcoming Visits (30), Invoices Due (1), Pending Proposals (0), and Pending Requests (0). A blue question mark icon is located in the bottom right corner of the dashboard area.

 The *Current Balance* amount include any credits that may have been applied to your invoices.

Viewing and Signing Proposals

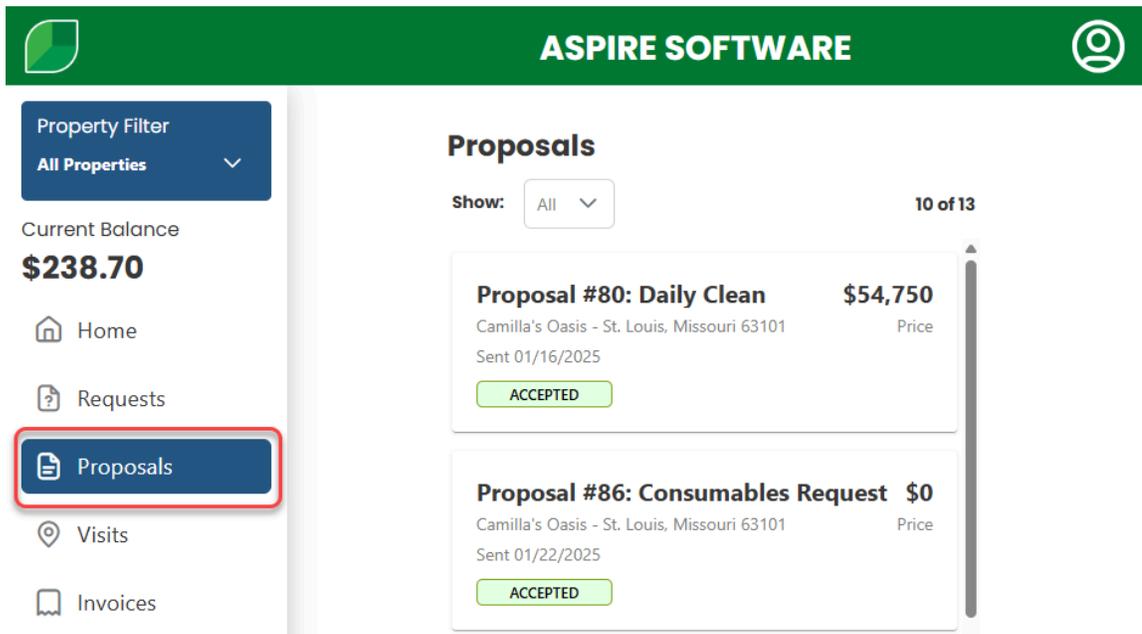
 **Note:** If you do not **see** *Proposals* displayed in the customer portal, **you can skip this section.**

All contacts tied to the property can **view** *Proposals*, but only *Primary* and *Billing* can **sign** *Proposals*.

If you **receive** a *Proposal* for work at your property, you can accept and **sign** inside your customer portal account with the use of an *Electronic Signature*!

Viewing a Proposal

View *Proposals* by clicking the *Proposals* section of the side menu.



The screenshot displays the ASPIRE SOFTWARE customer portal interface. The top navigation bar is green with the ASPIRE SOFTWARE logo and a user profile icon. The left sidebar contains a 'Property Filter' dropdown set to 'All Properties', a 'Current Balance' of '\$238.70', and navigation links for 'Home', 'Requests', 'Proposals' (highlighted with a red box), 'Visits', and 'Invoices'. The main content area is titled 'Proposals' and features a 'Show:' dropdown set to 'All' and a '10 of 13' indicator. Two proposal cards are visible: 'Proposal #80: Daily Clean' for '\$54,750' (sent 01/16/2025) and 'Proposal #86: Consumables Request' for '\$0' (sent 01/22/2025). Both cards show an 'ACCEPTED' status.

You can use the *Show* dropdown to review *All*, *Pending Accepted*, or *Rejected Proposals* on this screen.

ASPIRE SOFTWARE

Property Filter
All Properties

Current Balance
\$238.70

- Home
- Requests
- Proposals**
- Visits
- Invoices

Proposals 10 of 13

Show: All

- All
- Pending
- Accepted
- Rejected

Proposal #86: Consumables Request **\$0**
Camilla's Oasis - St. Louis, Missouri 63101
Sent 01/22/2025
ACCEPTED

Daily Clean **\$54,750**
Camilla's Oasis - St. Louis, Missouri 63101
Price

To review the proposal in more detail, **click** on any proposal from the *Proposals* list:

ASPIRE SOFTWARE

Property Filter
All Properties

Current Balance
\$238.70

- Home
- Requests
- Proposals**
- Visits
- Invoices

Proposals 14 of 14

Show: All

Proposal #88: Major Landscaping Project 2024 **\$44,579.33**
Tar Valon Towers - Columbia, Illinois 62236
Sent 03/18/2025
PENDING

Proposal #15: Weekly Maintenance **\$117,951**
Camilla's Oasis - St. Louis, Missouri 63101
Sent 08/07/2024
ACCEPTED

Proposal #56: Irrigation Inspections **\$260**
Tar Valon Towers - Columbia, Illinois 62236
Sent 08/28/2024
ACCEPTED

The proposals detail screen shows the proposal in a webpage format which is helpful for you if you plan to use a mobile device to review this information.

ASPIRE SOFTWARE

Property Filter
All Properties

Current Balance
\$238.70

Home
Requests
Proposals
Visits
Invoices

[Back to Proposals](#)

Proposal #88: Major Landscaping Project 2024
Tar Valon Towers
Columbia, Illinois 62236
PENDING Sent 03/18/2025

Price
\$44,579.33

Services

Mulch Install	\$40,749.60
1 Visit	
Plant Installation	\$2,135
1 Visit	
EN- Shrub Installation	\$1,694.73
1 Visit	
Total	\$44,579.33

Service Contact

Camilla Sailor
COO
Email cseiler@youraspire.com

Associated with:
515 Warnock
Columbia, Illinois 62236

[View Proposal](#) ?

Signing a Proposal

🧠 Only *Primary* and *Billing Contacts* tied to the property can sign the *Proposal*.

When you are ready to sign your proposal, **click** on the *View Proposal* button:

ASPIRE SOFTWARE

Property Filter
All Properties

Current Balance
\$238.70

Home
Requests
Proposals
Visits
Invoices

[Back to Proposals](#)

Proposal #88: Major Landscaping Project 2024
Tar Valon Towers
Columbia, Illinois 62236
PENDING Sent 03/18/2025

Price
\$44,579.33

Services

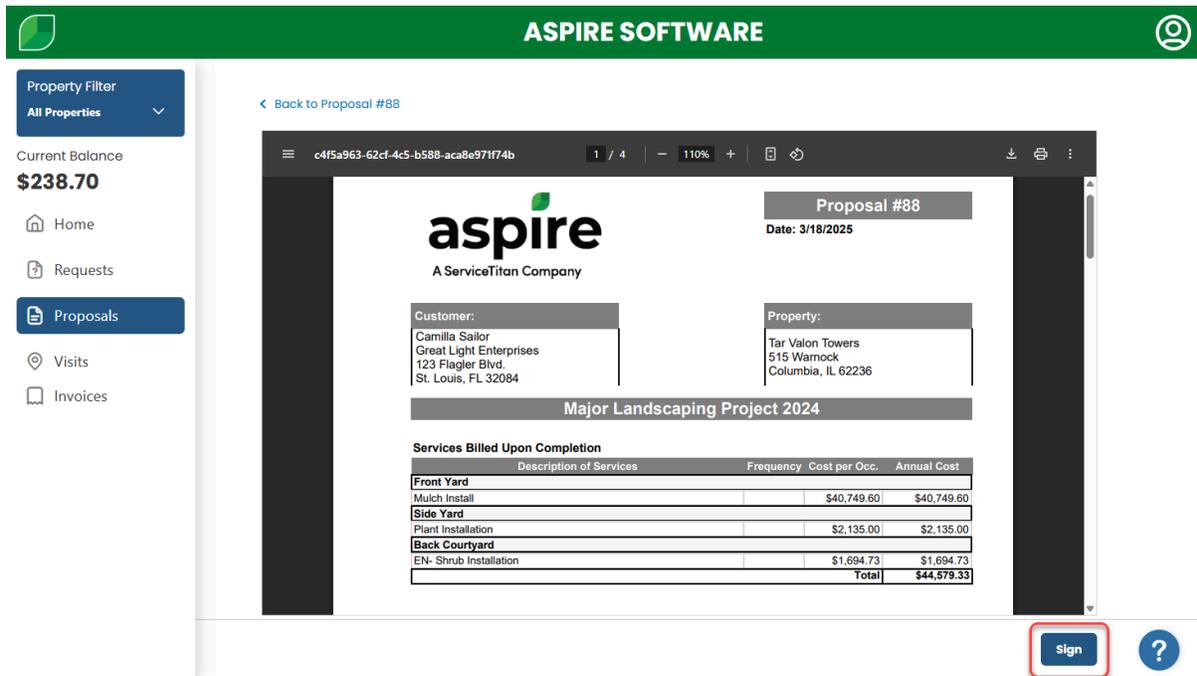
Mulch Install	\$40,749.60
1 Visit	
Plant Installation	\$2,135
1 Visit	
EN- Shrub Installation	\$1,694.73
1 Visit	
Total	\$44,579.33

Service Contact

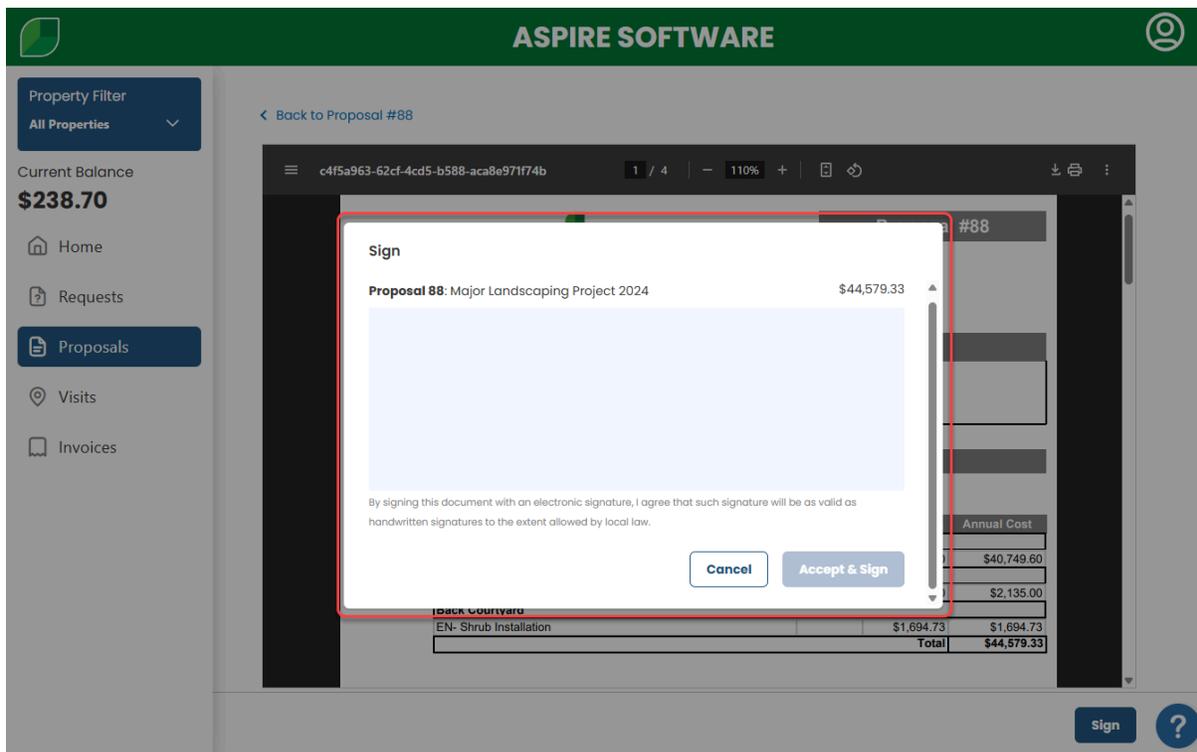
Camilla Sailor
COO
Email cseiler@youraspire.com

Associated with:
515 Warnock
Columbia, Illinois 62236

[View Proposal](#) ?



This opens the proposal in PDF format. Next, **click** the *Sign* button to pull up the *Electronic Signature* window.



💡 If the proposal has *Optional Services* estimated, they will **appear** in this window with checkmarks.

You can choose to check them at that time and add the additional cost to the approved proposal amount! The *Proposal Screen* will also be updated to show which *Optional Services* you have selected.

Once the customer **signs** the proposal, the proposal status will **update** from *Pending* to *Accepted*.

The *Sales Representative* tied to the opportunity will be **notified** via email that the proposal has been signed in the customer portal. The *Sales Representative* will also be notified of the signature on any Change Orders that were repropose to you!

The screenshot displays the ASPIRE SOFTWARE interface. On the left is a navigation sidebar with a 'Property Filter' dropdown set to 'All Properties', a 'Current Balance' of '\$238.70', and menu items for 'Home', 'Requests', 'Proposals', 'Visits', and 'Invoices'. The main content area is titled 'Proposals' and shows a list of three proposals, all with an 'ACCEPTED' status. The first proposal, 'Proposal #88: Major Landscaping Project 2024', is highlighted with a red border. It is for 'Tar Valon Towers - Columbia, Illinois 62236', sent on 03/18/2025, with a price of \$44,579.33. The second proposal, 'Proposal #15: Weekly Maintenance', is for 'Camilla's Oasis - St. Louis, Missouri 63101', sent on 08/07/2024, with a price of \$117,951. The third proposal, 'Proposal #56: Irrigation Inspections', is for 'Tar Valon Towers - Columbia, Illinois 62236', sent on 08/28/2024, with a price of \$260. A 'Show: All' dropdown and '14 of 14' indicator are visible at the top of the list.

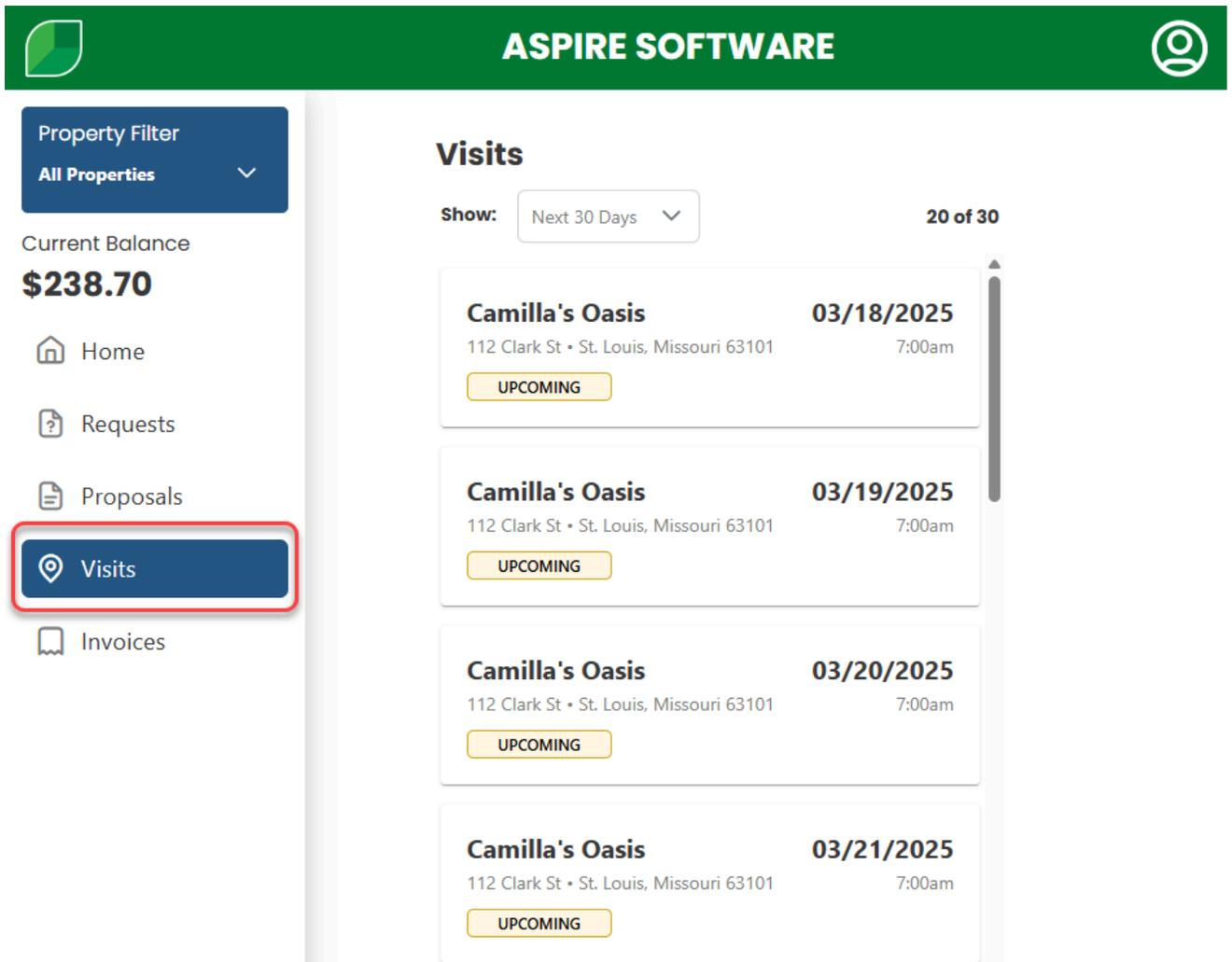
Proposal ID	Proposal Name	Property	Sent Date	Price	Status
Proposal #88	Major Landscaping Project 2024	Tar Valon Towers - Columbia, Illinois 62236	03/18/2025	\$44,579.33	ACCEPTED
Proposal #15	Weekly Maintenance	Camilla's Oasis - St. Louis, Missouri 63101	08/07/2024	\$117,951	ACCEPTED
Proposal #56	Irrigation Inspections	Tar Valon Towers - Columbia, Illinois 62236	08/28/2024	\$260	ACCEPTED

The Visits Section

 **Note:** If you do not see *Visits* displayed in the customer portal, you can **skip this section**.

Viewing Visits

On the *Visits* section of the *Customer Portal*, you **review** *Completed* or *Upcoming Visits* for the next 30 days.



The screenshot displays the ASPIRE SOFTWARE customer portal interface. At the top, there is a green header with the ASPIRE SOFTWARE logo and a user profile icon. On the left side, a dark blue sidebar contains navigation options: Home, Requests, Proposals, Visits (highlighted with a red box), and Invoices. The main content area is titled 'Visits' and includes a 'Show:' dropdown menu set to 'Next 30 Days' and a '20 of 30' indicator. Below this, there is a list of four upcoming visits for 'Camilla's Oasis' at '112 Clark St • St. Louis, Missouri 63101', each scheduled for 7:00am on consecutive dates from 03/18/2025 to 03/21/2025. Each visit entry has a yellow 'UPCOMING' button.

- **Selecting** any of the *Visits* on this screen will display more details:



Property Filter

All Properties

Current Balance

\$238.70

Home

Requests

Proposals

Visits

Invoices

Visits

Show: Next 30 Days

20 of 30

Camilla's Oasis

03/18/2025

112 Clark St • St. Louis, Missouri 63101

7:00am

UPCOMING

Camilla's Oasis

03/19/2025

112 Clark St • St. Louis, Missouri 63101

7:00am

UPCOMING

Camilla's Oasis

03/20/2025

112 Clark St • St. Louis, Missouri 63101

7:00am

UPCOMING

Camilla's Oasis

03/21/2025

112 Clark St • St. Louis, Missouri 63101

7:00am

UPCOMING

- Visit details shown in the portal include the *Visit Date*, scheduled *Services*, shared *Visit Notes*, and the *Service Contact's* details.

The screenshot shows the ASPIRE SOFTWARE customer portal. On the left is a navigation sidebar with options: Home, Requests, Proposals, Visits (highlighted), and Invoices. The main area is titled 'Visits' and shows a list of upcoming visits for 'Camilla's Oasis' at 112 Clark St - St. Louis, Missouri 63101. A modal window is open over the visit scheduled for 03/20/2025 at 7:00am. The modal contains the following information:

Camilla's Oasis	
112 Clark St - St. Louis, Missouri 63101	
UPCOMING	
Visit date	03/20/2025 7:00am
Services scheduled	Janitorial Daily Clean
Visit notes	During this visit, our crew leader will make sure all supplies are stocked as needed!
Service contact	Camilla Sailor cseiler@youraspire.com

The modal also includes a 'Close' button at the bottom right.

Viewing and Paying Invoices

 **Note:** If you do not see *Invoices* displayed in the customer portal, you can skip this section.

Viewing Invoices

When invoices are sent, you can view them inside of the portal if you are a contact tied to the invoiced property and have accepted your customer portal invite. You could also make payments as long as the company managing the customer portal has electronic payments **enabled!**

Either the *Primary* contact on the property, or the *Billing* contact on the invoice can **make payments** on the Invoice.

You can choose to select between viewing *All, Due or Paid* invoices in the dropdown on this screen.

The screenshot shows the ASPIRE SOFTWARE interface. On the left is a sidebar with a 'Property Filter' set to 'All Properties' and a 'Current Balance' of \$238.70. Below this are navigation icons for Home, Requests, Proposals, Visits, and Invoices. The main area is titled 'Invoices' and shows a 'Show:' dropdown menu with 'All' selected. To the right of the dropdown, it says '3 of 3'. Below the dropdown, there are three invoice cards: 1. 'Weekly Maintenance' with a 'PAID' status. 2. 'Invoice #4: Annual Maintenance Agreement' with a 'PAID' status. 3. 'Invoice #18' with a 'DUE' status and a balance of \$238.70.

This list will display important information regarding your individual invoice balances, the property the invoice is for, as well as the Service the invoice is for.

If you click on any invoice line item on this screen, you will be taken to the Invoice details screen in a webpage format.

ASPIRE SOFTWARE

Property Filter
All Properties

Current Balance
\$238.70

Home
Requests
Proposals
Visits
Invoices

Invoices

Show: All 3 of 3

Invoice #6: Weekly Maintenance
Camilla's Oasis • St. Louis, Missouri 63101
PAID

Invoice #4: Annual Maintenance Agree...
Tar Valon Towers • Columbia, Illinois 62236
PAID

Invoice #18 **\$238.70**
Tar Valon Towers • Columbia, Illinois 62236 Balance
DUE

Paying Invoices

 **Note:** If you do not see *Pay* displayed in the customer portal, you can **skip this section**.

The action buttons for paying invoices are *View Invoice* or *Pay Invoice*.

ASPIRE SOFTWARE

Property Filter
All Properties

Current Balance
\$238.70

Home
Requests
Proposals
Visits
Invoices

[Back to Invoices](#)

Invoice #18:
Tar Valon Towers
Columbia, Illinois 62236

DUE 11/26/2024

Balance
\$238.70

Services
Irrigation Inspection \$206.70
IR- Irrigation Repair - \$32
Emergency

Total \$238.70

Associated with:

- 515 Warnock**
Columbia, Illinois 62236
- Proposals
 - Proposal #58: Irrigation Repair**
08/28/2024
 - Proposal #56: Irrigation Inspections**
08/28/2024
- Tar Valon Towers**
08/28/2024

[View Invoice](#) [Pay Invoice](#)

Clicking *Pay Invoice* brings you directly to the payment screen!

Clicking *View Invoice* will allow you to view the *Invoice* in a PDF format. After reviewing the *Invoice*, you can **click *Pay Invoice*** on this screen.

ASPIRE SOFTWARE

Property Filter
All Properties

Current Balance
\$238.70

- Home
- Requests
- Proposals
- Visits
- Invoices

[Back to Invoice #18:](#)

97e5e020-0858-4ac6-81d7-d84b2311c320
1 / 1
100%

1758 Lexington Avenue
St Louis, MO 63101

A ServiceTitan Company

INVOICE

Date	Invoice No.
08/29/24	18
Terms	Due Date
Net 90	11/27/24

BILL TO
April Malimba 1234 Main St Brooklyn, NY 11213

PROPERTY
Tar Valon Towers 515 Wamock Columbia, IL 62236

Amount Due	Enclosed
\$238.70	

Please detach top portion and return with your payment.

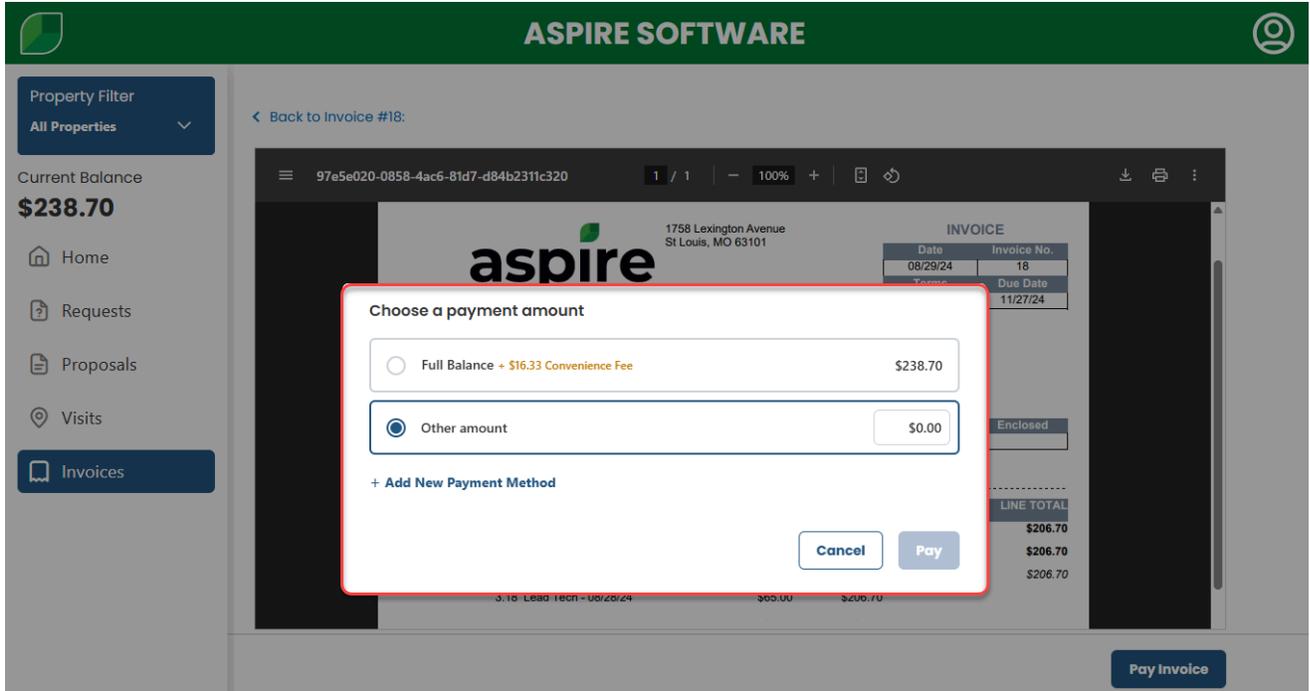
QTY	ITEM	UNIT PRICE	EXT PRICE	SALES TAX	LINE TOTAL
	#56 - Irrigation Inspections		\$206.70	\$0.00	\$206.70
	#56 - Irrigation Inspections		\$206.70	\$0.00	\$206.70
	Irrigation Inspection		\$206.70	\$0.00	\$206.70
3.18	Lead Tech - 08/28/24	\$65.00	\$206.70		
	#58 - Irrigation Repair		\$32.00	\$0.00	\$32.00
	IR- Irrigation Repair - Emergency		\$32.00	\$0.00	\$32.00
2.00	1" Poly Pipe (Material)	\$1.00	\$2.00		
5.00	6" Pop Up Spray Head (Material)	\$6.00	\$30.00		
Total			\$238.70	\$0.00	\$238.70

Pay Invoice

Choose a Payment Amount

Note: If you don't see *Other Amount* on this screen, you can skip this section.

If *Partial Payments* are accepted for your customer portal, then there will be an option to pay either the *Full Balance* or *Other Amount*, which allows you to **pay** a partial amount towards their *Invoice Balance*.



Any convenience fees are **automatically calculated** on this screen and will be **displayed**.

🧠 If you have any payment methods on file, they will be displayed in this window. You can always choose to use the *Add New Payment Method* option before paying the invoice.

Important to know about *Invoices* in the Customer Portal:

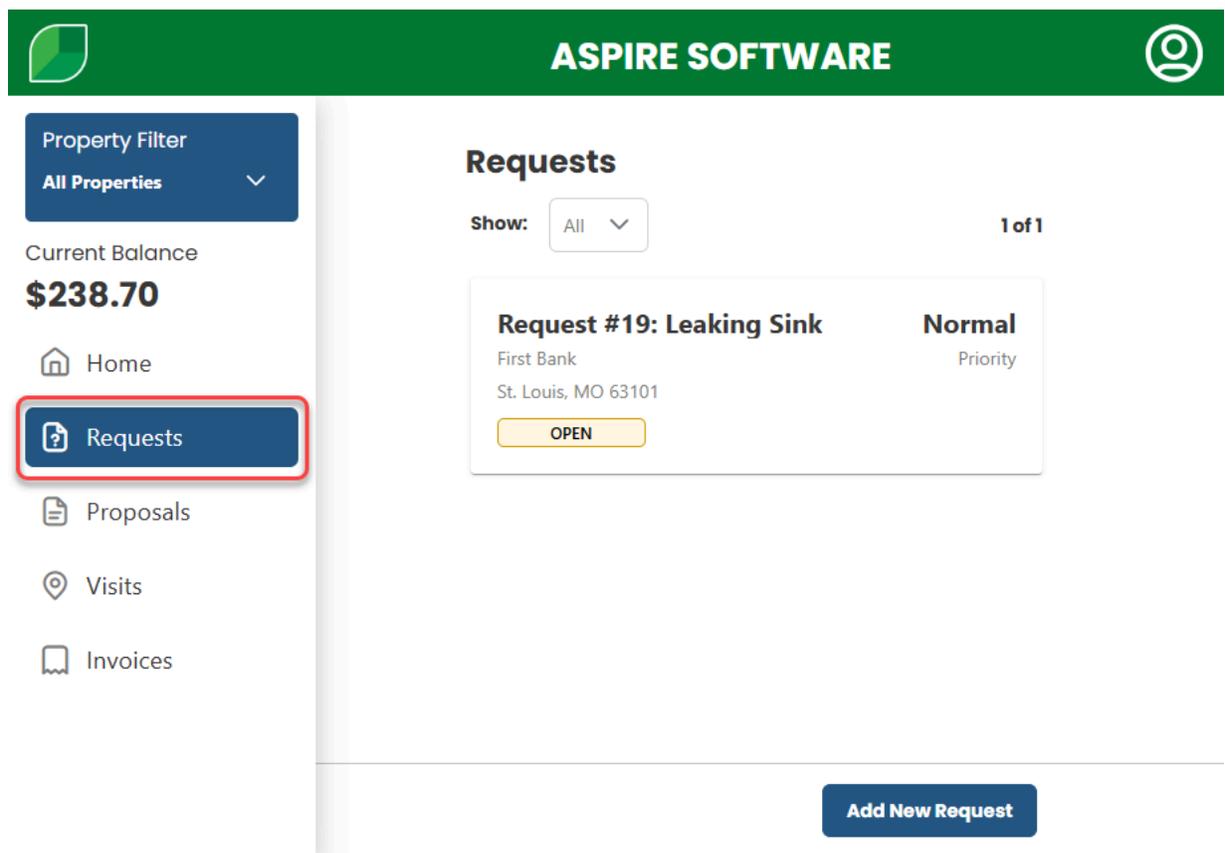
🧠 The due date **displayed** in the *Customer Portal* is tied to the net terms of the properties' invoices.

Viewing Requests

 **Note:** If you do not see Requests **displayed** in the customer portal, you can skip this section.

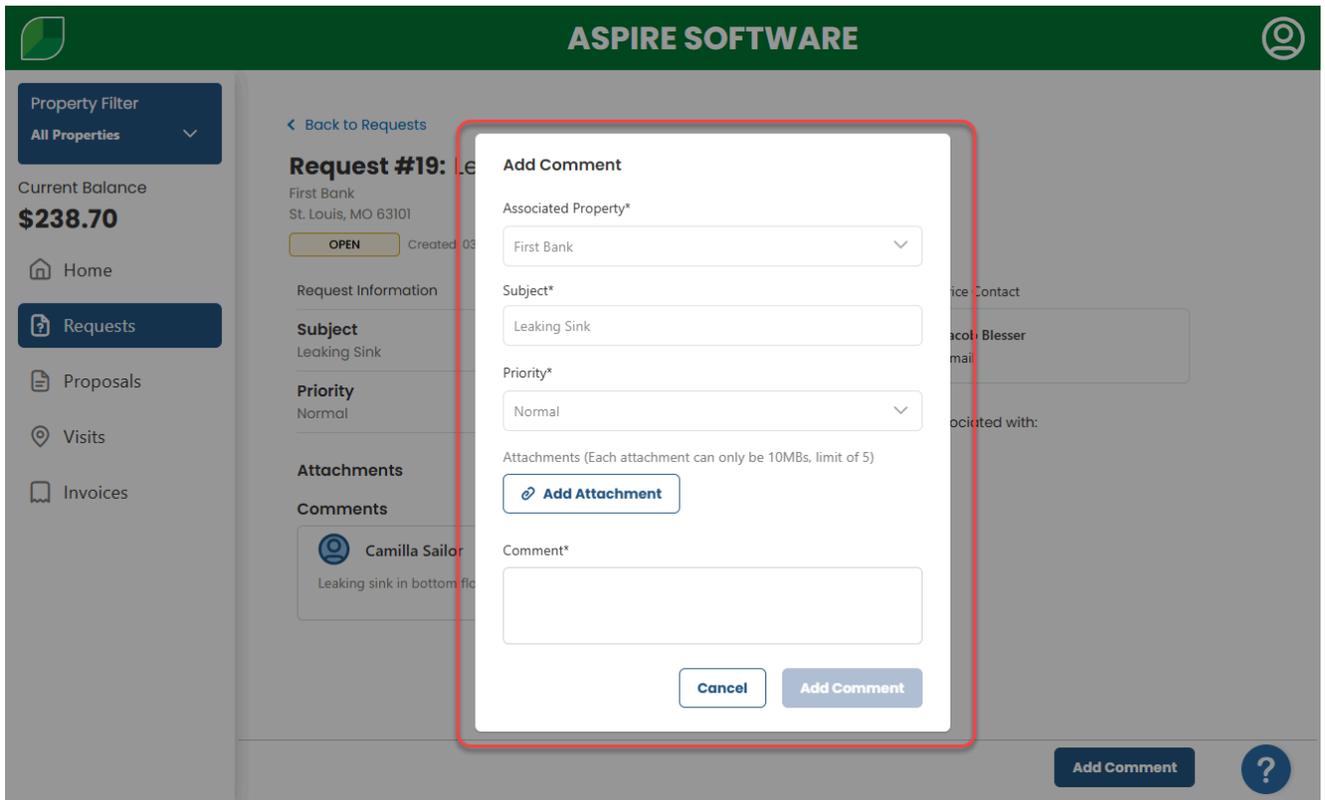
You can **view** *Requests* that are tied to your properties including any comment that is made onto the *Request* in the customer portal.

 All contacts tied to this property can view, create, and comment on Requests.



The screenshot shows the ASPIRE SOFTWARE customer portal interface. At the top, there is a green header with the ASPIRE SOFTWARE logo and a user profile icon. On the left side, there is a navigation menu with options: Home, Requests (highlighted with a red box), Proposals, Visits, and Invoices. Above the navigation menu, there is a 'Property Filter' dropdown set to 'All Properties' and a 'Current Balance' of '\$238.70'. The main content area is titled 'Requests' and shows a single request: 'Request #19: Leaking Sink' with a 'Normal' priority. The request details include 'First Bank' and 'St. Louis, MO 63101'. There is an 'OPEN' button next to the request. At the bottom right, there is an 'Add New Request' button.

You have the option to **add** comments, including adding attachments, or you can **create** new *Requests* directly from the portal for any of their properties.



Once a request has been created in the portal, the *Account Owner* associated with your property will receive an email notification, letting them know that there is a new *Request* ready for review.