

# Table of contents

Administration > Configuration > Customer Portal

[You've Set It Up, Now What? Your Customer Portal Explained](#) ..... 2

# You've Set It Up, Now What? Your Customer Portal Explained

## Purpose

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

✦ Note: If your customers have access to multiple portals due to having properties in multiple Branches with your company, make sure they are logging in with the correct Customer Portal URL as each branch for this company will have their own unique URL.

Their email address and password will be the same for each URL they have access to.

We will go over the self-serve features that the customer portal offers, so you can understand the level of permissions that your customers can do on their own, without additional management:

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



Property Filter  
All Properties

Current Balance  
**\$238.70**

Home

Requests

Proposals

Visits

Invoices

### Home



<b>Upcoming Visits</b> <b>30</b>	<b>Invoices Due</b> <b>1</b>
<b>Pending Proposals</b> <b>0</b>	<b>Pending Requests</b> <b>0</b>



## Profile Icon Settings

Under the profile icon, users can set payment methods, reset their password for the portal, learn more about the current version of the customer portal, and sign out of their accounts.

## Manage Payments

Customers have the option to add a new payment method, and set a default payment method for their transactions under *Manage Payments*.

⚠️ Your Aspire system must be set up to accept *Electronic Payments* before your customers are able to self pay in the *Customer Portal*.

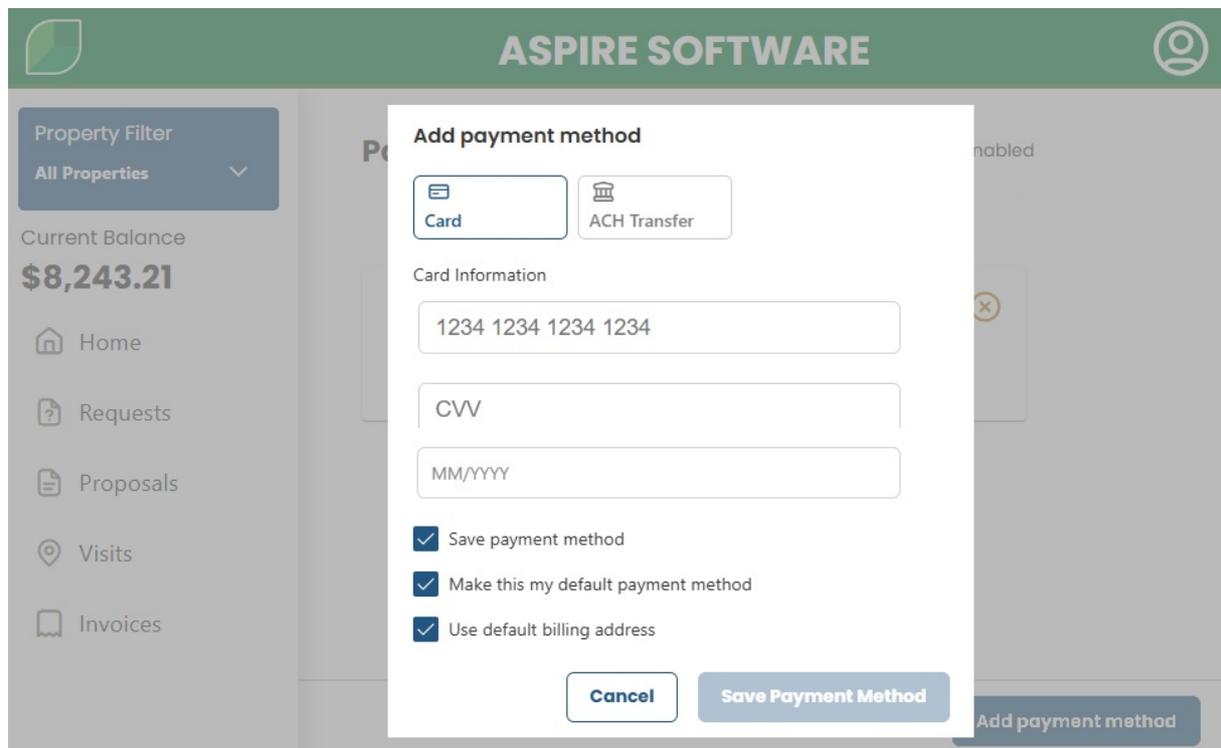
📖 To learn more about our electronic payment partner that integrates with Aspire and the *Customer Portal*, click [here](#).

 Note: Your customers will be only able to use payment method types based on what you have chosen to accept and have also [set up in Administration](#) for the *Customer Portal*.

Existing payment methods for the customer will appear here, or customers can click the *Add Payment Method* button to add a new source.

## Adding a Card Payment Method

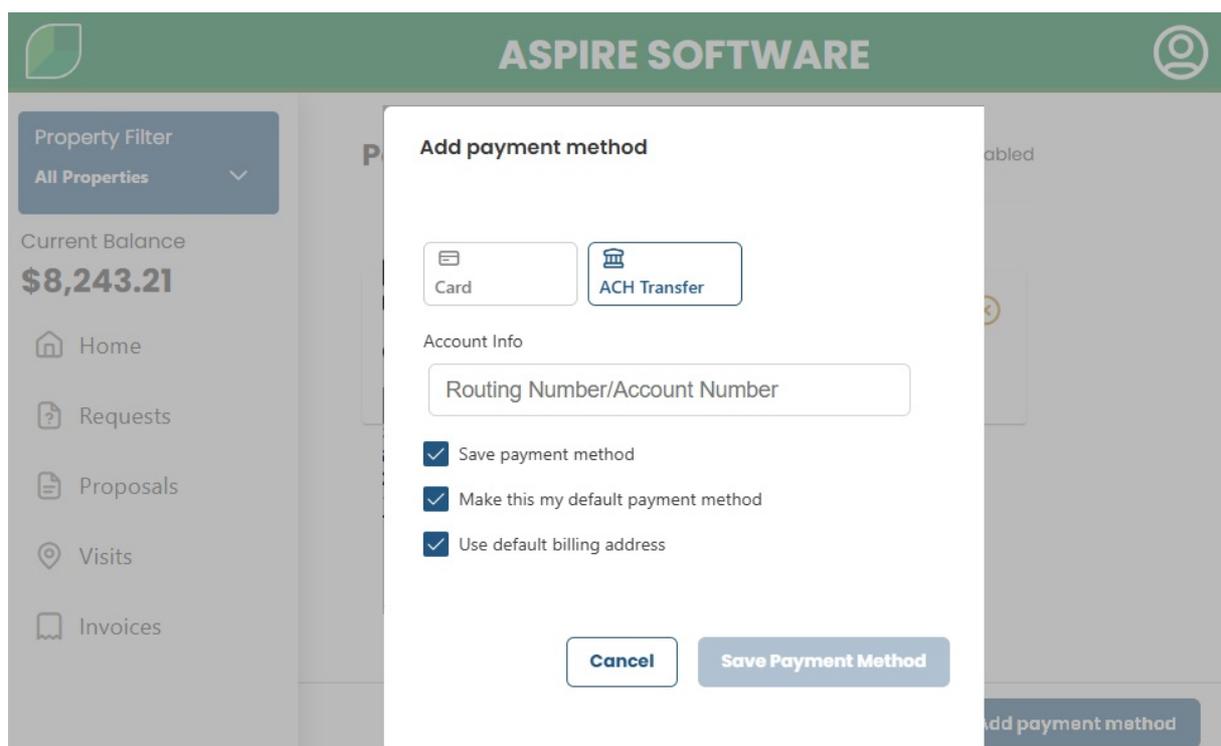
If you accept Card payments in the *Customer Portal*, customers will see the option to add cards to their account and save them for future use!



The screenshot shows the ASPIRE SOFTWARE Customer Portal interface. On the left, there is a sidebar with a 'Property Filter' set to 'All Properties', a 'Current Balance' of '\$8,243.21', and navigation links for 'Home', 'Requests', 'Proposals', 'Visits', and 'Invoices'. The main content area is partially obscured by a modal window titled 'Add payment method'. The modal has two tabs: 'Card' (selected) and 'ACH Transfer'. Under 'Card Information', there are three input fields: a card number field containing '1234 1234 1234 1234', a CVV field containing 'CVV', and an expiration date field containing 'MM/YYYY'. Below these 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. A 'Add payment method' button is visible in the background.

## Adding an ACH Payment Method

If you accept ACH Payment methods, the ACH option will appear for customers to add a source to.



The screenshot shows the ASPIRE SOFTWARE Customer Portal interface, similar to the previous one. The modal window is titled 'Add payment method' and has two tabs: 'Card' and 'ACH Transfer' (selected). Under 'Account Info', there is a single input field containing 'Routing Number/Account Number'. Below this field 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. A 'Add payment method' button is visible in the background.

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

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

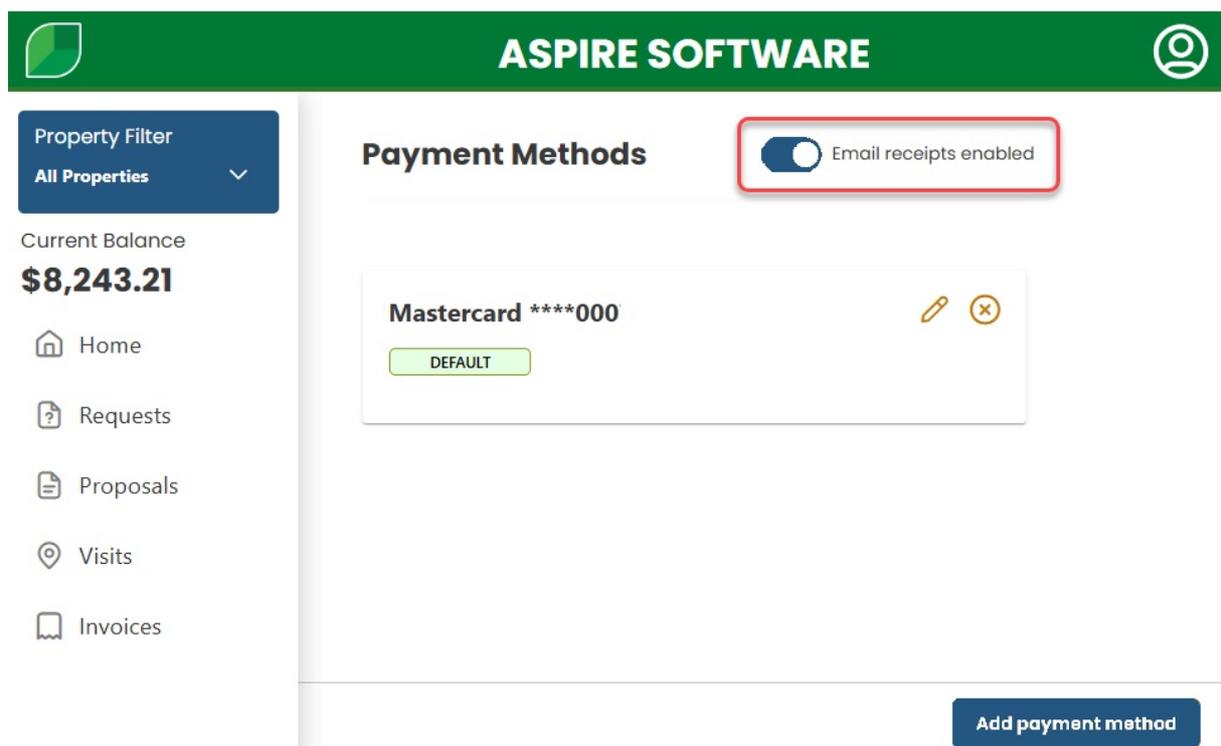
📖 To learn about setting up *Electronic Payments* for the *Customer Portal* in detail, [watch this video!](#)

## Electronic Receipts

🔑 Note: In order to use this section, you are required to have [Electronic Payments](#) turned on for your organization's Aspire account.

Regardless of if a customer has chosen to add ACH or Card payment methods to their account, with any sources added, they can opt into getting transaction receipts emailed to them.

They can turn the toggle button on to enable payment receipts:



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 dark blue sidebar menu with the following items: 'Property Filter' (with a dropdown arrow), 'All Properties', 'Current Balance \$8,243.21', 'Home', 'Requests', 'Proposals', 'Visits', and 'Invoices'. The main content area is titled 'Payment Methods' and features a toggle switch labeled 'Email receipts enabled' which is currently turned on. Below this, there is a card for a 'Mastercard \*\*\*\*000' with a 'DEFAULT' label and edit/delete icons. At the bottom right of the main content area, there is a blue button labeled 'Add payment method'.

## Reviewing the Customer Portal Side Menu

### The Property Filter



Property Filter  
All Properties

Current Balance  
**\$238.70**

Home

Requests

Proposals

Visits

Invoices

### Home



<b>Upcoming Visits</b> <b>30</b>	<b>Invoices Due</b> <b>1</b>
<b>Pending Proposals</b> <b>0</b>	<b>Pending Requests</b> <b>0</b>



The property filter helps your client filter portal content and helps them make their experience their own! By default, all of your customer's properties will be selected, but if they want to view one property's data, or even a group of properties, they 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.



Property Filter

All Properties

All Properties

- Camilla's Oasis
- First Bank
- Three Tails
- Tar Valon Towers

Visits

Invoices

### Home



<b>Upcoming Visits</b> <b>30</b>	<b>Invoices Due</b> <b>1</b>
<b>Pending Proposals</b> <b>0</b>	<b>Pending Requests</b> <b>0</b>

## Current Balance

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

Property Filter  
All Properties

Current Balance  
**\$238.70**

Home

Requests

Proposals

Visits

Invoices

### Home

Upcoming Visits  
**30**

Invoices Due  
**1**

Pending Proposals  
**0**

Pending Requests  
**0**

💡 The *Current Balance* amount includes applied invoice credits, but it doesn't include any unapplied credits.

## The Proposals Section

All proposals that have been shared with your customers via the Email or Print Proposal features in Aspire Desktop will appear in the Proposals section of the Customer Portal.

### Viewing a Proposal

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

**ASPIRE SOFTWARE**

Property Filter  
All Properties

Current Balance  
**\$238.70**

Home  
Requests  
**Proposals**  
Visits  
Invoices

**Proposals**

Show: All 10 of 13

**Proposal #80: Daily Clean** \$54,750  
Camilla's Oasis - St. Louis, Missouri 63101 Price  
Sent 01/16/2025  
ACCEPTED

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

Customers 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**

Show: All 10 of 13

All  
Pending  
Accepted  
Rejected

**Proposal #80: Daily Clean** \$54,750  
Camilla's Oasis - St. Louis, Missouri 63101 Price  
Sent 01/16/2025  
ACCEPTED

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

Note: The statuses on the customer portal do not align with the statuses you will see in *Aspire Desktop*. After a customer signs their proposal, the status will automatically change from *Pending* to *Accepted* on the *Customer Portal*. However, your team will still need to manually mark the proposal as *Won* in *Aspire Desktop*.

The reason for this is so your customers have more visibility on whether their electronic signatures have been applied to the proposal.

*Rejected* status in the *Customer Portal* is equal to a lost Opportunity.

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

**Proposals**

Show: All 14 of 14

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

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

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

The proposals detail screen shows the proposal in a webpage format which is helpful for clients that will be using a mobile device to review this information.

[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

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

Service Contact

Camilla Sailor  
COO  
Email [cseiler@youraspire.com](mailto:cseiler@youraspire.com)

Associated with:

**515 Warnock**  
Columbia, Illinois 62236

[View Proposal](#)

In *Administration*, If you have [set up](#) to have your service line item details shown in the portal, this is where that information will be displayed! If you have chosen to not show details, this screen will show you a lump sum of the total services estimated instead.

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 1 Visit	\$40,749.60
Plant Installation 1 Visit	\$2,135
EN- Shrub Installation 1 Visit	\$1,694.73
<b>Total</b>	<b>\$44,579.33</b>

Service Contact  
Camilla Sailor  
COO  
Email cseiler@youraspire.com

Associated with:  
515 Warnock  
Columbia, Illinois 62236

View Proposal ?

The *Service Contact* you see on this screen will be the *Sales Rep* on the opportunity, which is also an [optional setting](#) turned on in *Administration* during the set up of your Customer Portal for phone numbers. The *Service Contact Name* and email address will always be displayed.

## Signing a Proposal

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

When your customers are ready to sign their proposals, they will 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

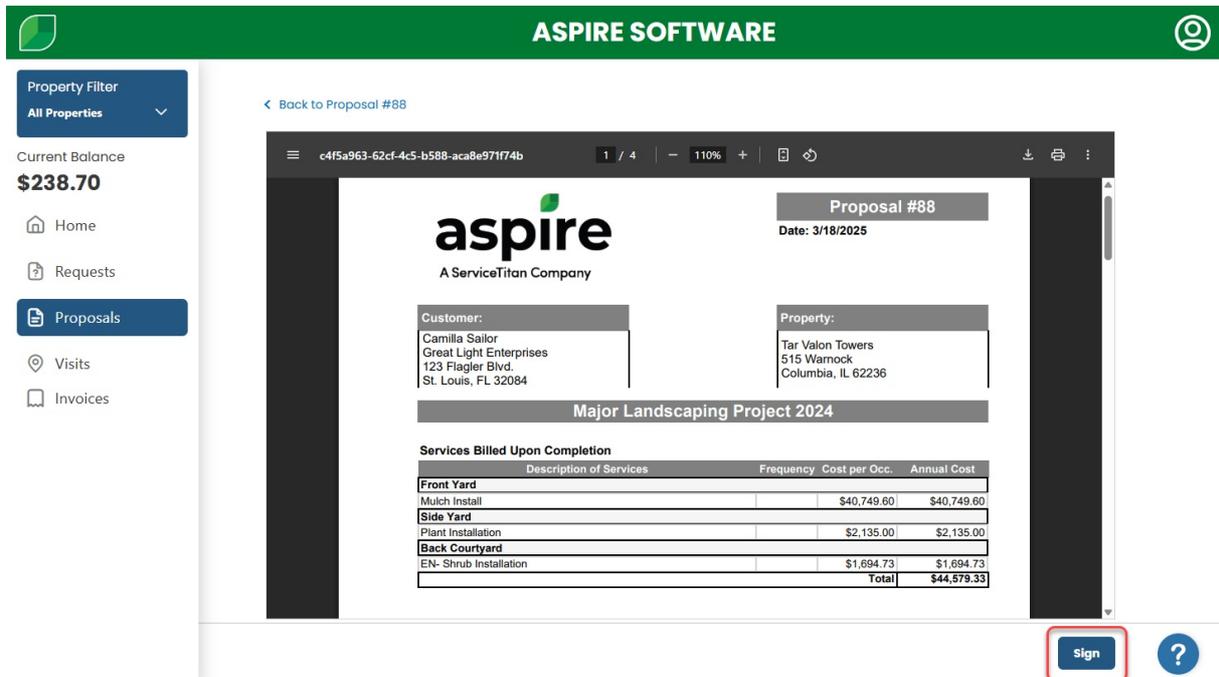
Mulch Install 1 Visit	\$40,749.60
Plant Installation 1 Visit	\$2,135
EN- Shrub Installation 1 Visit	\$1,694.73
<b>Total</b>	<b>\$44,579.33</b>

Service Contact  
Camilla Sailor  
COO  
Email cseiler@youraspire.com

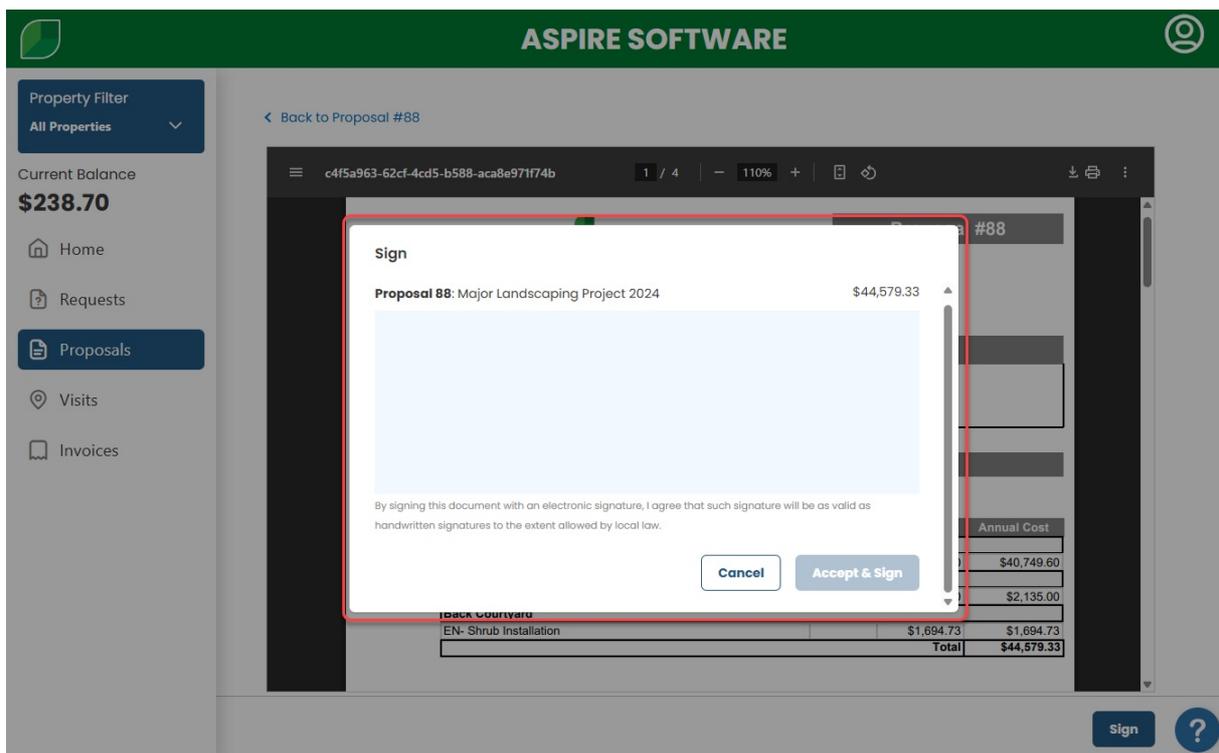
Associated with:  
515 Warnock  
Columbia, Illinois 62236

View Proposal ?

This opens the proposal in PDF format.



Next, they will 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. This is available for use for both *Work Order* and *Contract Opportunity Types*.

Your customer 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 showing which *Optional Services* have been selected by your customer.

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 repropoed to the customer!

The screenshot shows the ASPIRE SOFTWARE Customer Portal. On the left is a navigation sidebar with options like 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 is highlighted with a red box.

Proposal ID	Proposal Name	Price	Status
Proposal #88	Major Landscaping Project 2024	\$44,579.33	ACCEPTED
Proposal #15	Weekly Maintenance	\$117,951	ACCEPTED
Proposal #56	Irrigation Inspections	\$260	ACCEPTED

### Important things to know about proposals in the Customer Portal:

- Customers can sign proposals that are in Delivered status.
- If a proposal's status is In Production, customers can only view proposals.
- Your team can confirm if proposals have been signed without clicking into individual opportunities by adding the Electronic Signature [display column](#) in the [Opportunities list](#).

## The Visits Section

### Viewing Visits

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



Property Filter  
All Properties

Current Balance

**\$238.70**

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

### Visits

Show: Next 30 Days 20 of 30

<b>Camilla's Oasis</b> 112 Clark St • St. Louis, Missouri 63101	<b>03/18/2025</b> 7:00am
UPCOMING	
<b>Camilla's Oasis</b> 112 Clark St • St. Louis, Missouri 63101	<b>03/19/2025</b> 7:00am
UPCOMING	
<b>Camilla's Oasis</b> 112 Clark St • St. Louis, Missouri 63101	<b>03/20/2025</b> 7:00am
UPCOMING	
<b>Camilla's Oasis</b> 112 Clark St • St. Louis, Missouri 63101	<b>03/21/2025</b> 7:00am
UPCOMING	

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



Property Filter  
All Properties

Current Balance  
**\$238.70**

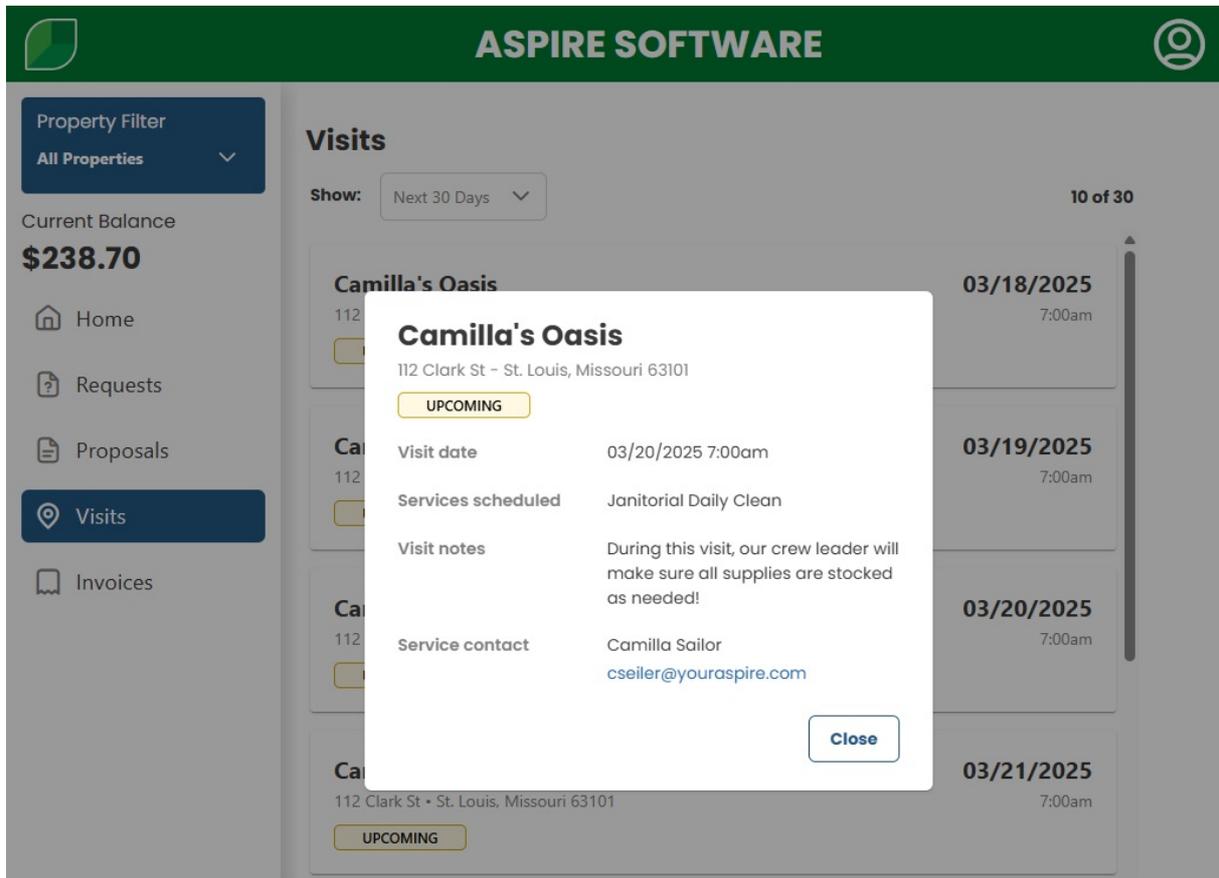
- Home
- Requests
- Proposals
- Visits**
- Invoices

### Visits

Show: Next 30 Days 20 of 30

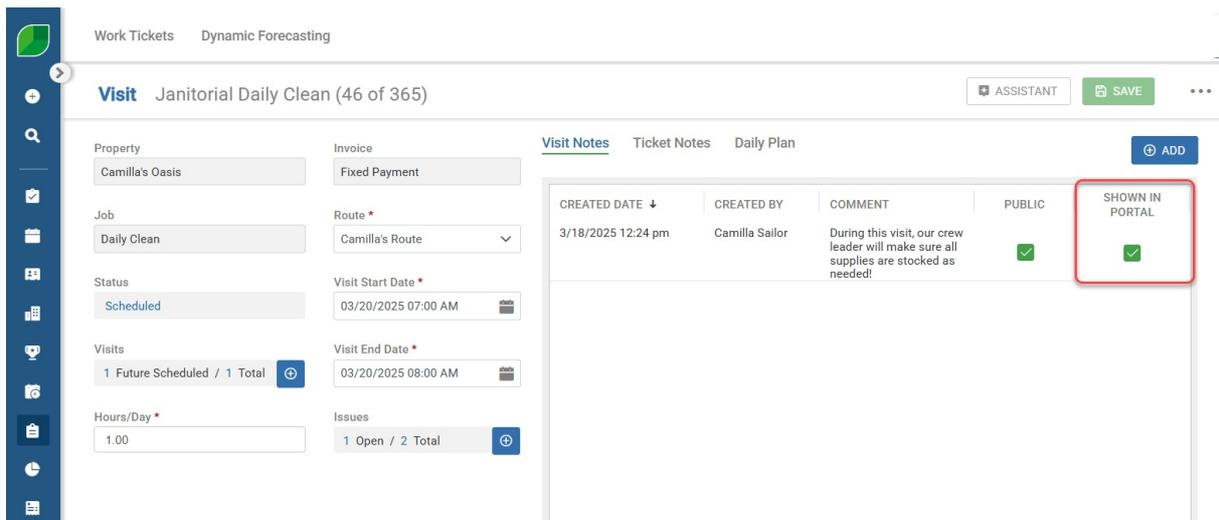
<b>Camilla's Oasis</b> 112 Clark St • St. Louis, Missouri 63101	<b>03/18/2025</b> 7:00am
UPCOMING	
<b>Camilla's Oasis</b> 112 Clark St • St. Louis, Missouri 63101	<b>03/19/2025</b> 7:00am
UPCOMING	
<b>Camilla's Oasis</b> 112 Clark St • St. Louis, Missouri 63101	<b>03/20/2025</b> 7:00am
UPCOMING	
<b>Camilla's Oasis</b> 112 Clark St • St. Louis, Missouri 63101	<b>03/21/2025</b> 7:00am
UPCOMING	

- Visit details shown in the portal include the *Visit Date*, scheduled *Services*, *Visit Notes* published to the *Portal*, and the *Service Contact*, which is the *Sales Rep* tied to the property.



## More on Visit Notes for the Customer Portal

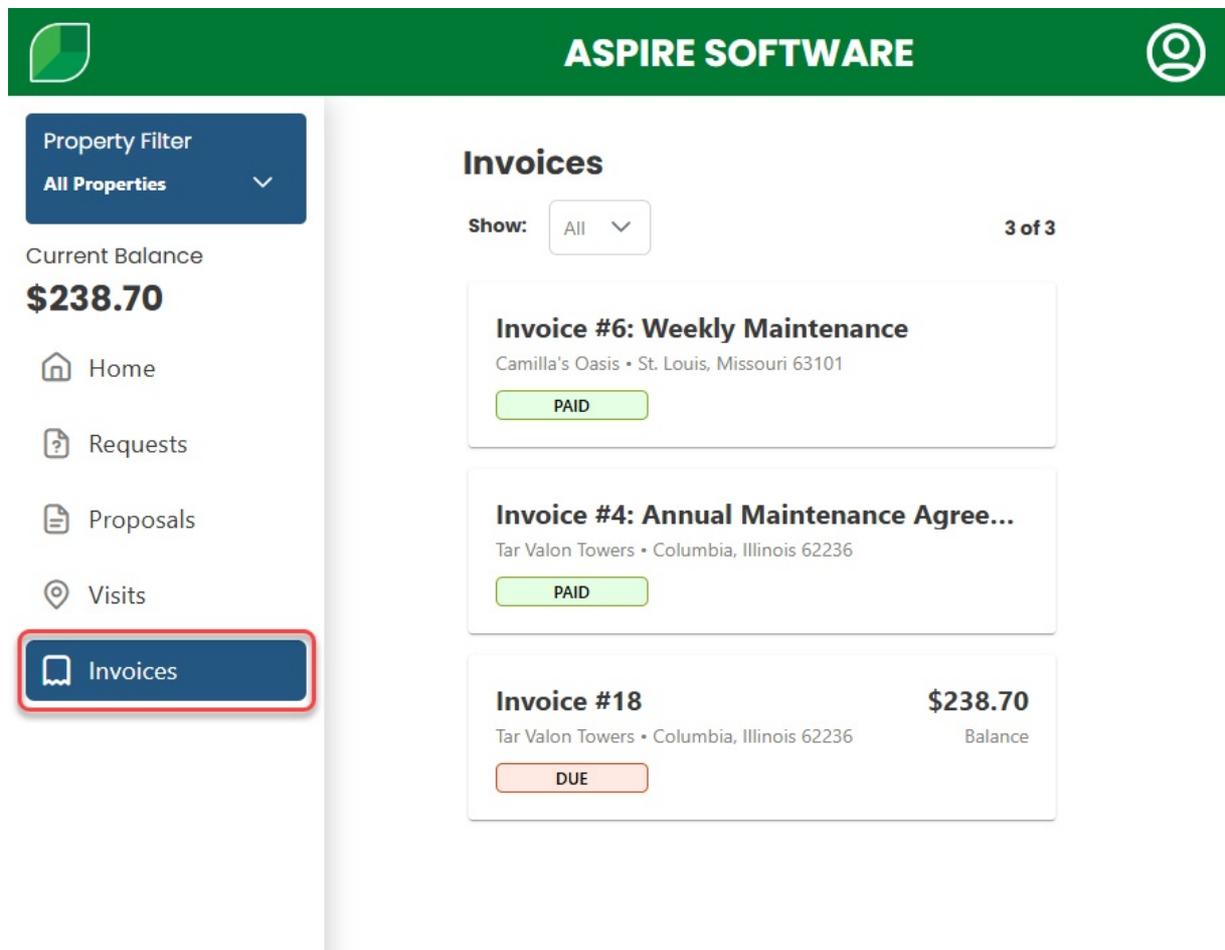
If you are adding *Visit Notes* to a Work Ticket Visit, you have the option to check the *Shown in Portal* checkbox to display your *Visit Note* to your customer when they are in their customer portal:



## The Invoices Section

# Viewing Invoices

All of your customers' invoices that have been shared are going to be displayed in the Invoices section of the Customer Portal.



**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

Note: Visibility for reviewing *Invoices* in the *Customer Portal* are for all associated *Customer* contacts that have accepted their invitation.

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

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



Property Filter  
All Properties

Current Balance  
**\$238.70**

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

### Invoices

Show: All 3 of 3

**Weekly Maintenance**  
Camilla, Missouri 63101  
PAID

**Invoice #4: Annual Maintenance Agreement**  
Tar Valon Towers • Columbia, Illinois 62236  
PAID

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

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

If a customer clicks on any invoice line item on this screen, they 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

This screen shows their balance, Services and Visit detail, Service Contact and the Property and links back to the original Proposal details.

Important things to know about Invoices in the Customer Portal:

- 👤 All contacts on the property can view invoices.
- 👤 The Primary and Billing Contacts can pay invoices.
- 👤 The due date displayed in the *Customer Portal* is tied to the net terms of the invoices.

Next, learn how a customer makes a payment on one of their invoices!

## Paying Invoices

**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 - Emergency \$32**  
**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](#)

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

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

Clicking *View Invoice* will allow your customer to view their *Invoice* in a PDF format. After reviewing the *Invoice*, they 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%

**aspire**  
A ServiceTitan Company  
1758 Lexington Avenue  
St Louis, MO 63101

**INVOICE**

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

BILL TO	PROPERTY
April Malmba 1234 Main St Brooklyn, NY 11213	Tar Valon Towers 515 Warnock Columbia, IL 62236

Amount Due	Enclosed
\$238.70	Enclosed

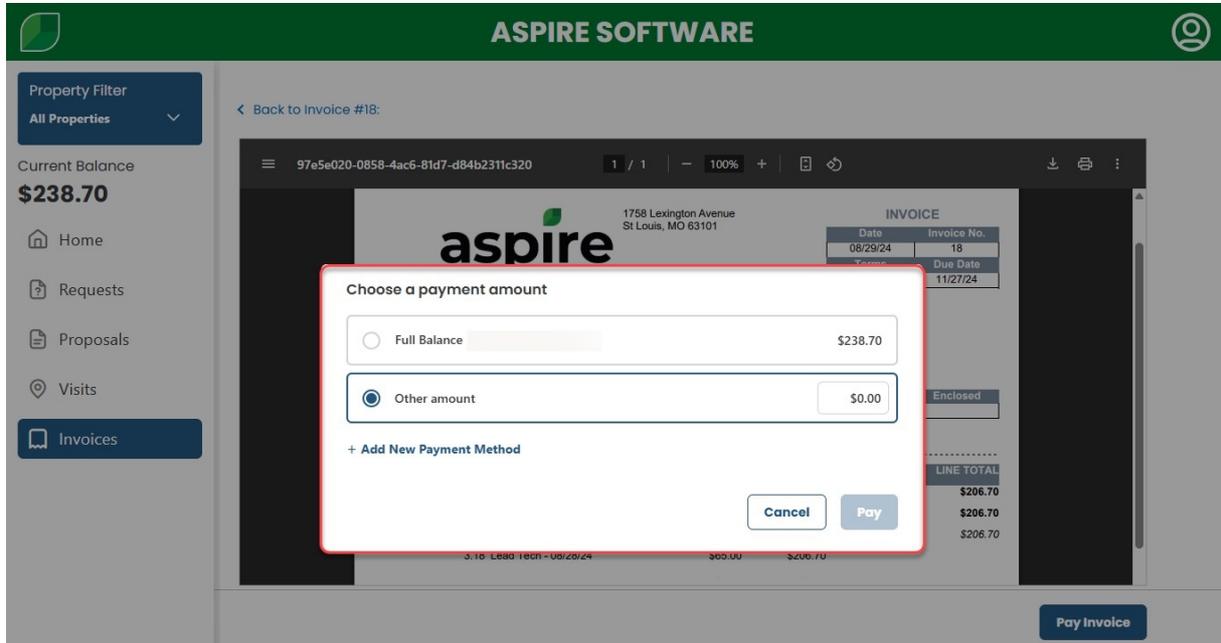
Please detach top portion and return with your payment.

QTY	ITEM	UNIT PRICE	EXT PRICE	SALES TAX	LINE TOTAL
	#56 - Irrigation Inspections		\$206.70	\$0.00	\$206.70
	<b>#56 - Irrigation Inspections</b>		<b>\$206.70</b>	<b>\$0.00</b>	<b>\$206.70</b>
	Irrigation Inspection		\$206.70	\$0.00	\$206.70
3.18	Lead Tech - 08/28/24	\$65.00	\$206.70		
	<b>#58 - Irrigation Repair</b>		<b>\$32.00</b>	<b>\$0.00</b>	<b>\$32.00</b>
	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		
	<b>Total</b>		<b>\$238.70</b>	<b>\$0.00</b>	<b>\$238.70</b>

[Pay Invoice](#)

# Choose a Payment Amount

If *Partial Payments* were set up for your customer portal in Administration, then there will be both the option to pay either the *Full Balance*, or *Other Amount*, which allows customers to pay a partial amount towards their *Invoice Balance*.



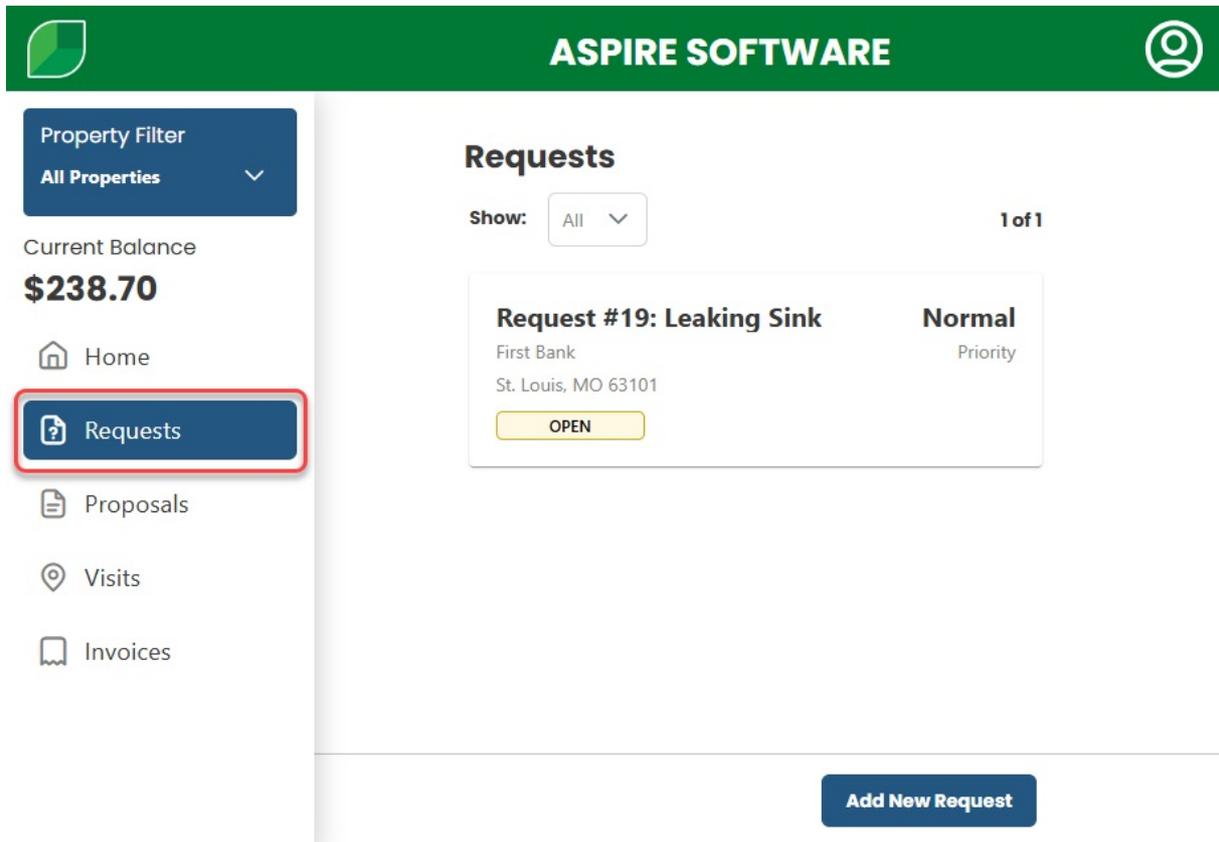
🔗 If a customer has any payment methods on file, they will be displayed in this window. They can always choose to use the *Add New Payment Method* option before paying their invoice.

# The Requests Section

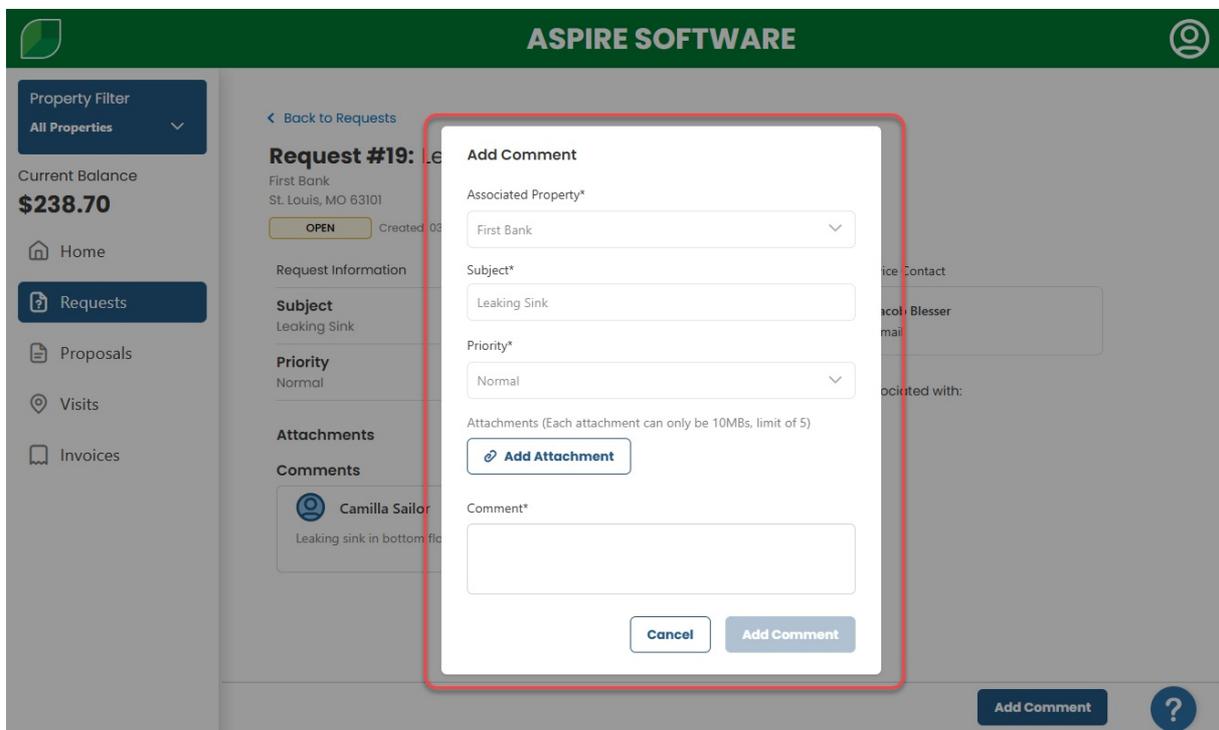
Customers can view *Requests* (reminder these are also called *Issues* in *Aspire Desktop*) within the portal. All contacts tied to this property can view, create, and comment on *Requests*.

They can only view the *Requests* that have been marked as *Include Client* when *Issues* are created or edited in *Aspire Desktop*.

*Comments* on the *Request* are visible to customers if they are marked as *Public*.



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



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

✦ Note: *Requests* shown to customers can be turned on or off depending on your *Customer Portal Configuration* settings.

To read more about creating and managing *Issues* in Aspire, read the following article, [here](#).