

# USING THE CUSTOMER PORTAL

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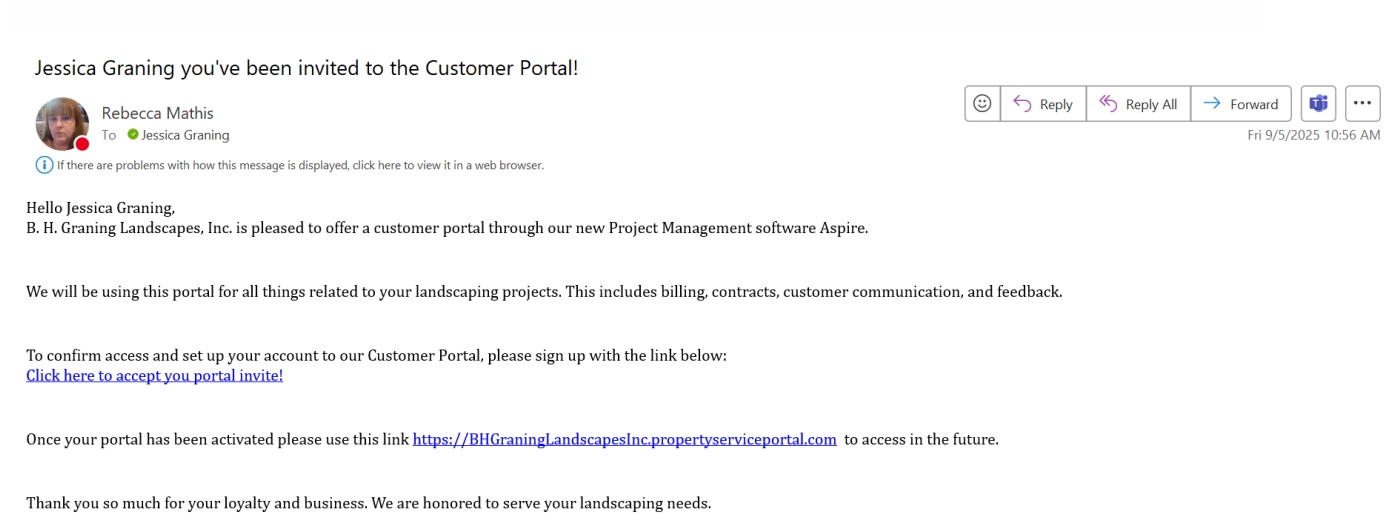
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# Purpose

**Read** this helpful step-by-step to learn about some of the features in the B. H. Graning Landscapes, Inc. company portal to help you understand what's available to you as we 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 us.



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.



## WELCOME

### Sign In

Email Address

Password

Sign In

☒ 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 B. H. Graning Landscapes, Inc., and complete with the password that you **created** at the time of sign-up. Once you are logged in, your dashboard will be displayed.



## WELCOME

Property Filter  
224 Gray Mist Lane

Current Balance

\$0

Home

Requests

Proposals

Visits

Invoices

### Home



Upcoming Visits

0

Invoices Due

0

Pending Proposals

0

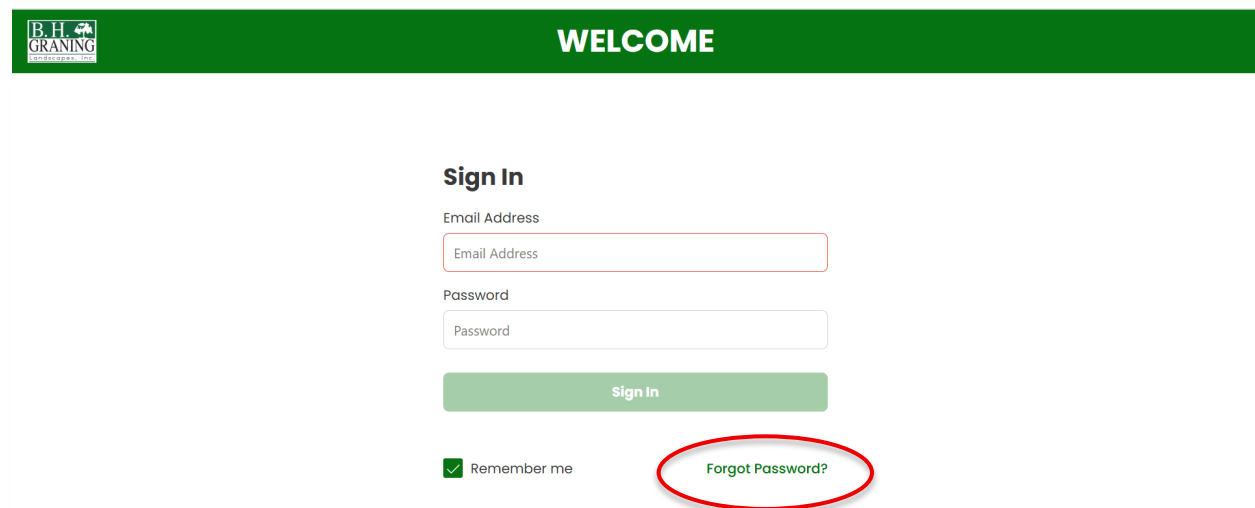
Pending Requests

1

## 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.



**B.H. GRADING** WELCOME

**Sign In**

Email Address

Email Address

Password

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:

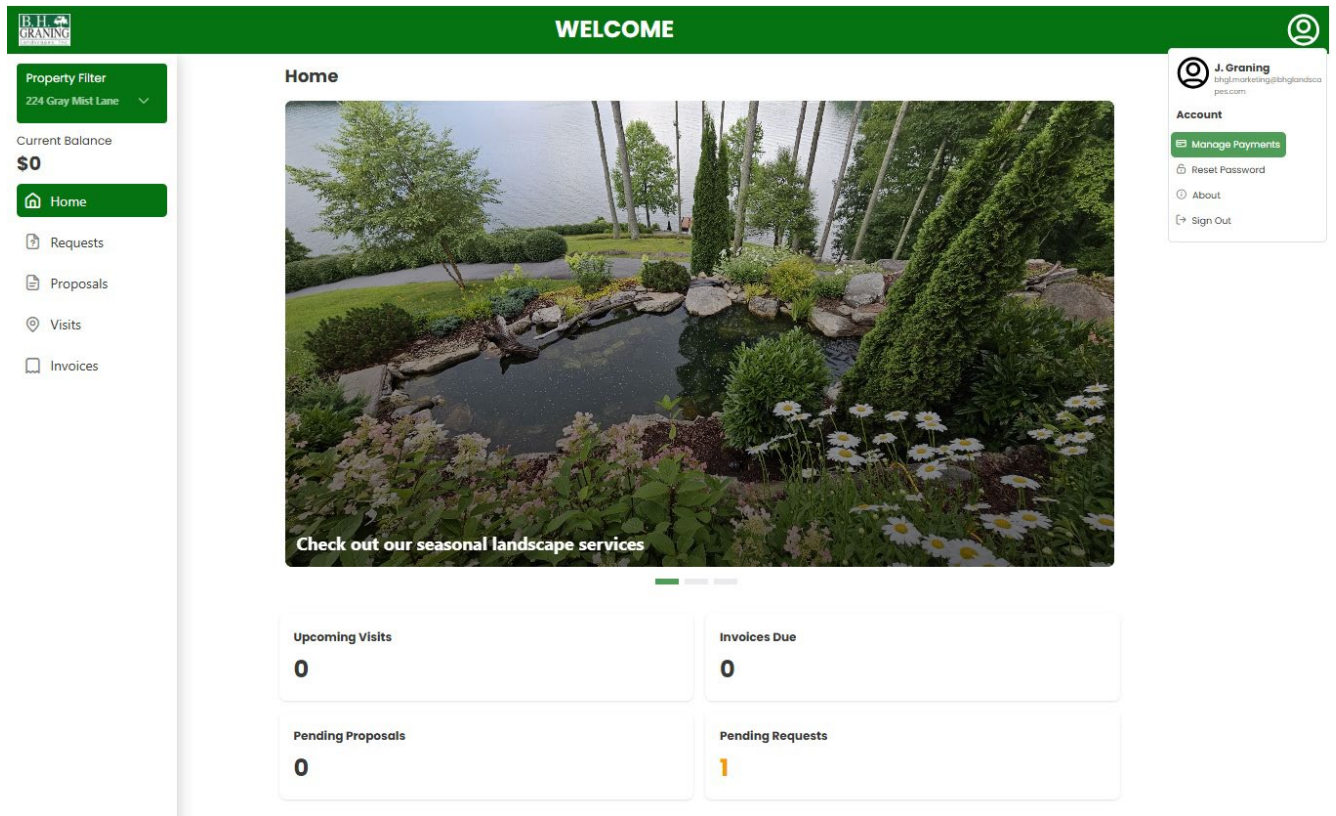
- **Manage** payment methods
- **View** upcoming visits
- **View** and **sign** *Proposals*
- **View** and **pay** *Invoices*
- **Review** and **comment** on *Requests*
- **Manage** multiple properties

## Profile Icon Controls

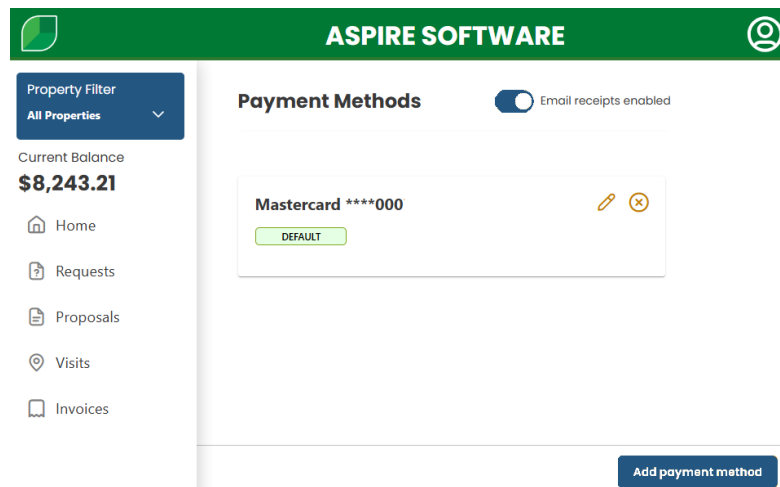
Under the profile icon, you can set payment methods, reset your password for the portal, and sign out of your account.

### 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*.

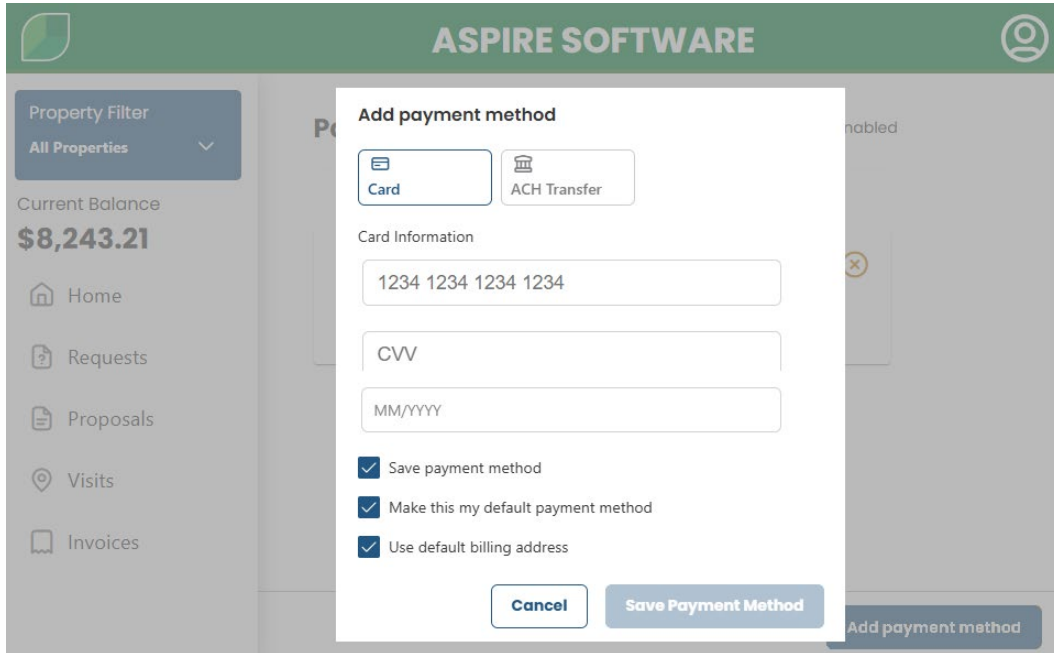


Existing payment methods on file for your account will appear here, or you can **click** the *Add Payment Method* button to add a new source.



## 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 shows the ASPIRE SOFTWARE Customer Portal interface. On the left is a sidebar with a 'Property Filter' dropdown 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 white modal titled 'Add payment method'. This modal has two tabs: 'Card' (selected) and 'ACH Transfer'. Under the 'Card' tab, there are three input fields for 'Card Information': a card number (placeholder '1234 1234 1234 1234'), a CVV (placeholder 'CVV'), and an expiration date (placeholder '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 faint 'Add payment method' button is visible in the background on the right.

## 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

☒ Save payment method

☒ Make this my default payment method

☒ Use default billing address

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

Account Info

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

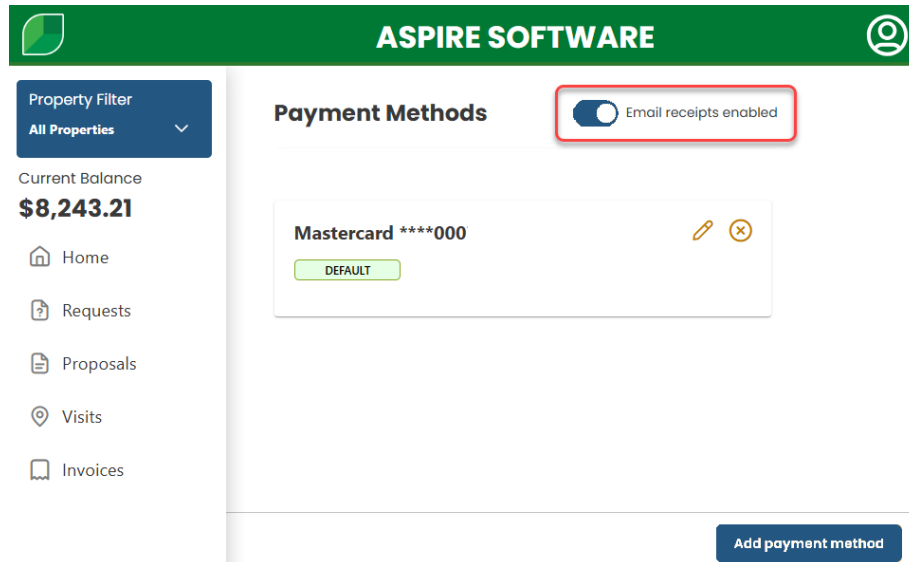
- After **entering** the bank information, you can decide to make this a default payment method by checking the *Make this my default payment method* checkbox.
- When all information is entered, **select** *Save Payment Method*.



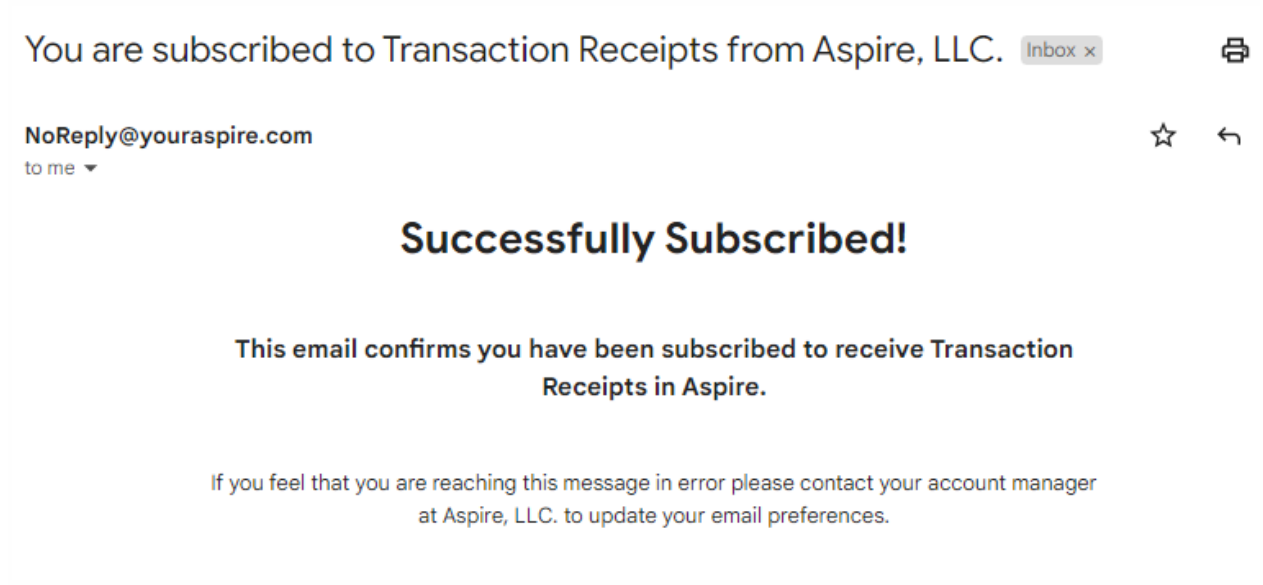
## Subscribing to Electronic Receipts in the Customer Portal

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*:

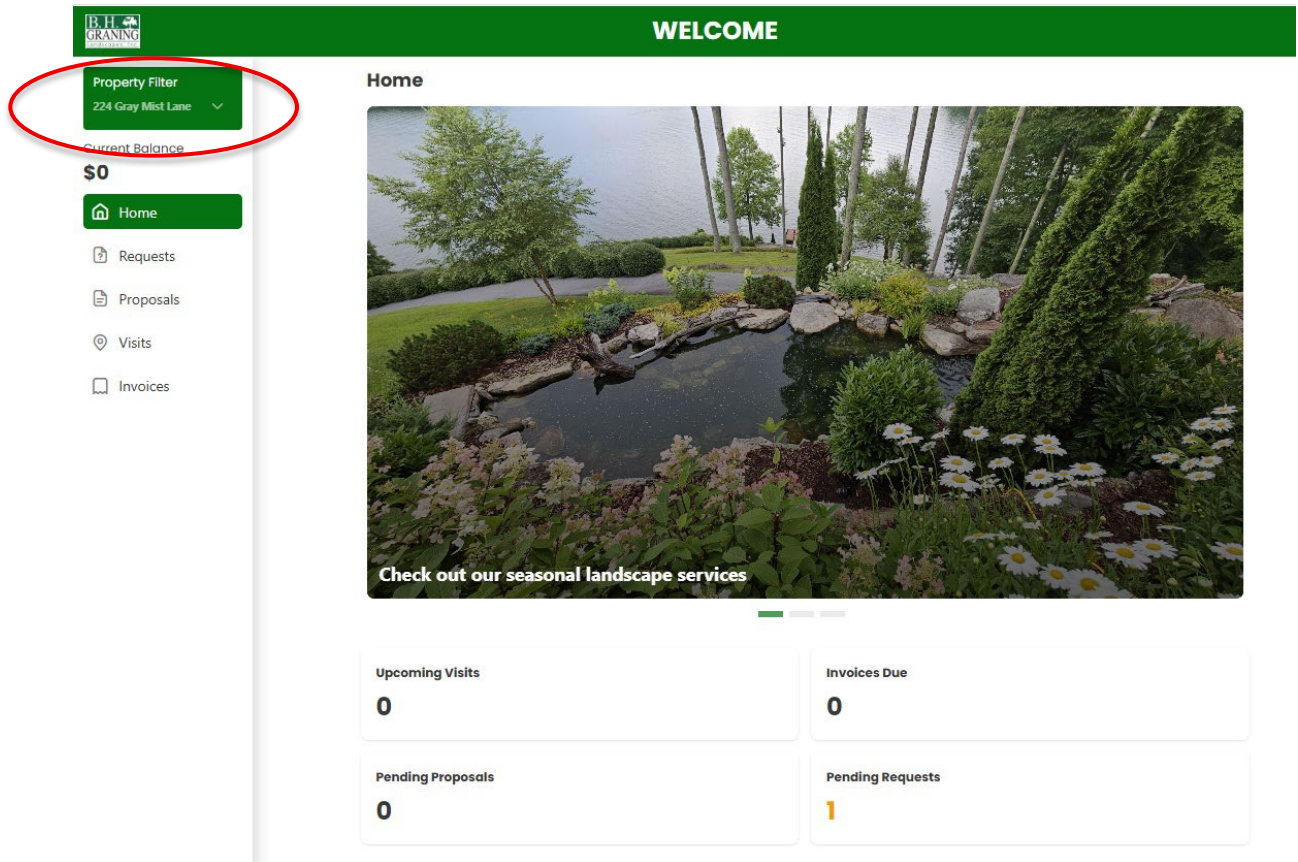



- Now, when a payment is **made** with the payment source on file, you would automatically get a receipt for the amount paid.

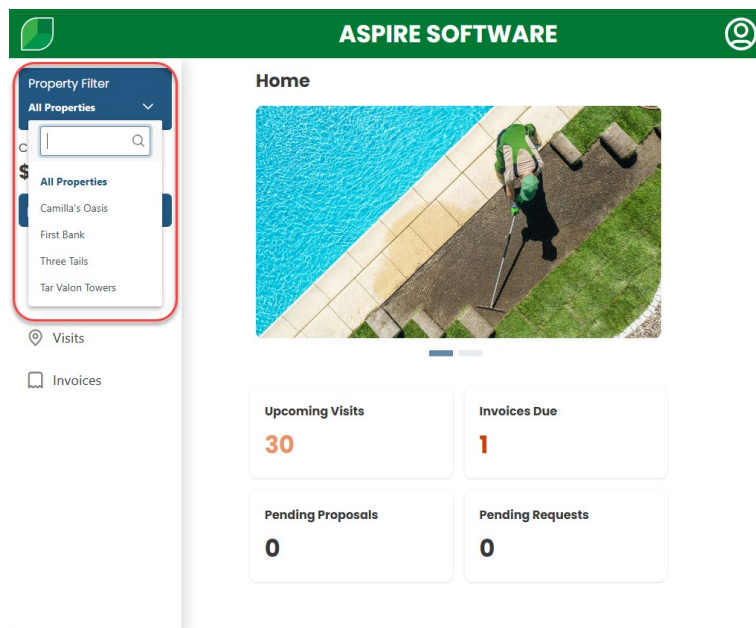
## Understanding the Customer Portal Side Menu

### 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 displays the B.H. GRANING software interface. At the top, a green header bar contains the company logo and the word "WELCOME". On the left, a sidebar menu lists various functions: "Property Filter" (with a dropdown arrow), "Current Balance" (displaying "\$0"), "Home" (with a house icon), "Requests", "Proposals", "Visits", and "Invoices". A red circle highlights the "Current Balance" section in the sidebar. The main content area, titled "Home", features a large landscape photograph of a pond with flowers and trees. Below the photo, a text overlay reads "Check out our seasonal landscape services". At the bottom, four white boxes provide summary statistics: "Upcoming Visits" (0), "Invoices Due" (0), "Pending Proposals" (0), and "Pending Requests" (1).

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

# Viewing and Signing Proposals

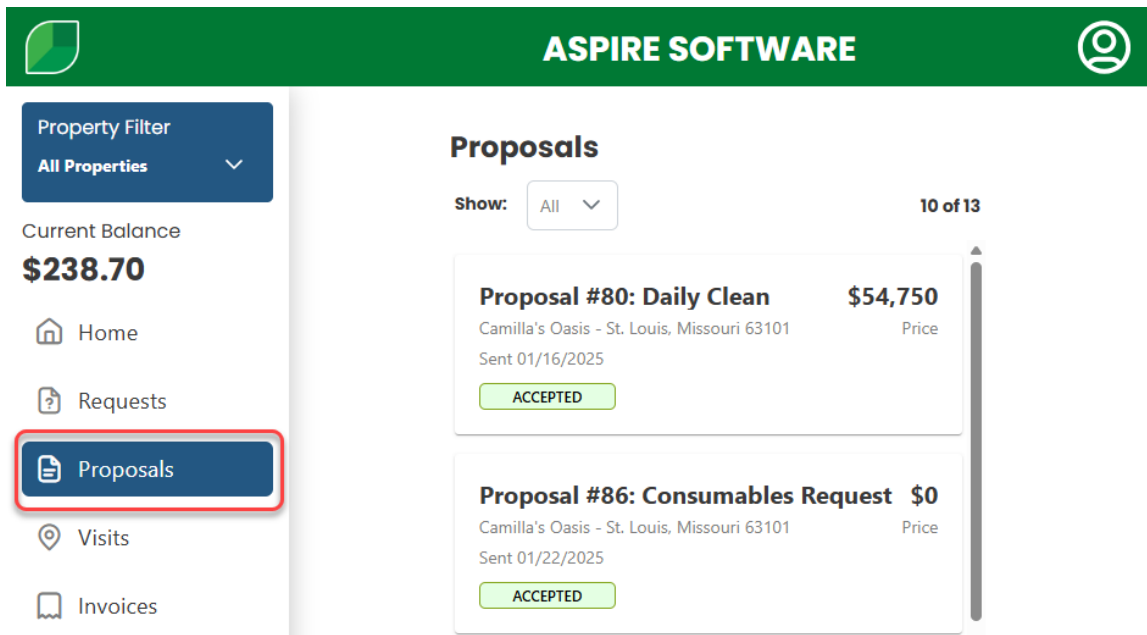
 **Note:** If you do not **see** *Proposals* displayed in the customer portal, **you can skip this section.**

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. On the left is a dark blue sidebar with a 'Property Filter' dropdown set to 'All Properties'. Below this, the 'Current Balance' is shown as '\$238.70'. A list of navigation links includes 'Home', 'Requests', 'Proposals' (highlighted with a red rectangle), '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 have a green 'ACCEPTED' button.

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

Show: All

10 of 13

Prop #87: Daily Clean

Camilla's Oasis - St. Louis, Missouri 63101

Sent 01/22/2025

\$54,750

Price

Accepted

Proposal #86: Consumables Request

Camilla's Oasis - St. Louis, Missouri 63101



Sent 01/22/2025

\$0

Price

ACCEPTED

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

Show: All

14 of 14

Proposal #88: Major Landscaping Project 2024

Tar Valon Towers - Columbia, Illinois 62236

Sent 03/18/2025

\$44,579.33

Price

PENDING

Proposal #15: Weekly Maintenance

Camilla's Oasis - St. Louis, Missouri 63101

Sent 08/07/2024

\$117,951

Price

ACCEPTED

Proposal #56: Irrigation Inspections

Tar Valon Towers - Columbia, Illinois 62236



Sent 08/28/2024

\$260

Price

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


<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 [csailer@youraspire.com](mailto:csailer@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


<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 [csailer@youraspire.com](mailto:csailer@youraspire.com)

Associated with:

 **515 Warnock**  
Columbia, Illinois 62236

View Proposal


**ASPIRE SOFTWARE**

Property Filter  
All Properties

Current Balance  
**\$238.70**

Home  
Requests  
**Proposals**  
Visits  
Invoices

[Back to Proposal #88](#)

c4f5a963-62cf-4c5-b588-aca8e971f74b
1 / 4
110%

aspire  
A ServiceTitan Company

**Proposal #88**  
Date: 3/18/2025

Customer:  
Camilla Sailor  
Great Light Enterprises  
123 Flagler Blvd.  
St. Louis, FL 32084

Property:  
Tar Valon Towers  
515 Warnock  
Columbia, IL 62236

**Major Landscaping Project 2024**

**Services Billed Upon Completion**

Description of Services	Frequency	Cost per Occ.	Annual Cost
<b>Front Yard</b>			
Mulch Install		\$40,749.60	\$40,749.60
<b>Side Yard</b>			
Plant Installation		\$2,135.00	\$2,135.00
<b>Back Courtyard</b>			
EN- Shrub Installation		\$1,694.73	\$1,694.73
<b>Total</b>			<b>\$44,579.33</b>

Sign

?

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

**ASPIRE SOFTWARE**

Property Filter  
All Properties

Current Balance  
**\$238.70**

Home  
Requests  
**Proposals**  
Visits  
Invoices

[Back to Proposal #88](#)

c4f5a963-62cf-4cd5-b588-aca8e971f74b
1 / 4
110%

**Sign**

**Proposal 88: Major Landscaping Project 2024**

\$44,579.33

By signing this document with an electronic signature, I agree that such signature will be as valid as handwritten signatures to the extent allowed by local law.

Cancel

Accept & Sign

Sign

?

16



💡 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 repoposed to you!

**ASPIRE SOFTWARE**

**Proposals**

Show: All ▾ 14 of 14


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

**Property Filter**  
All Properties ▾

Current Balance  
**\$238.70**

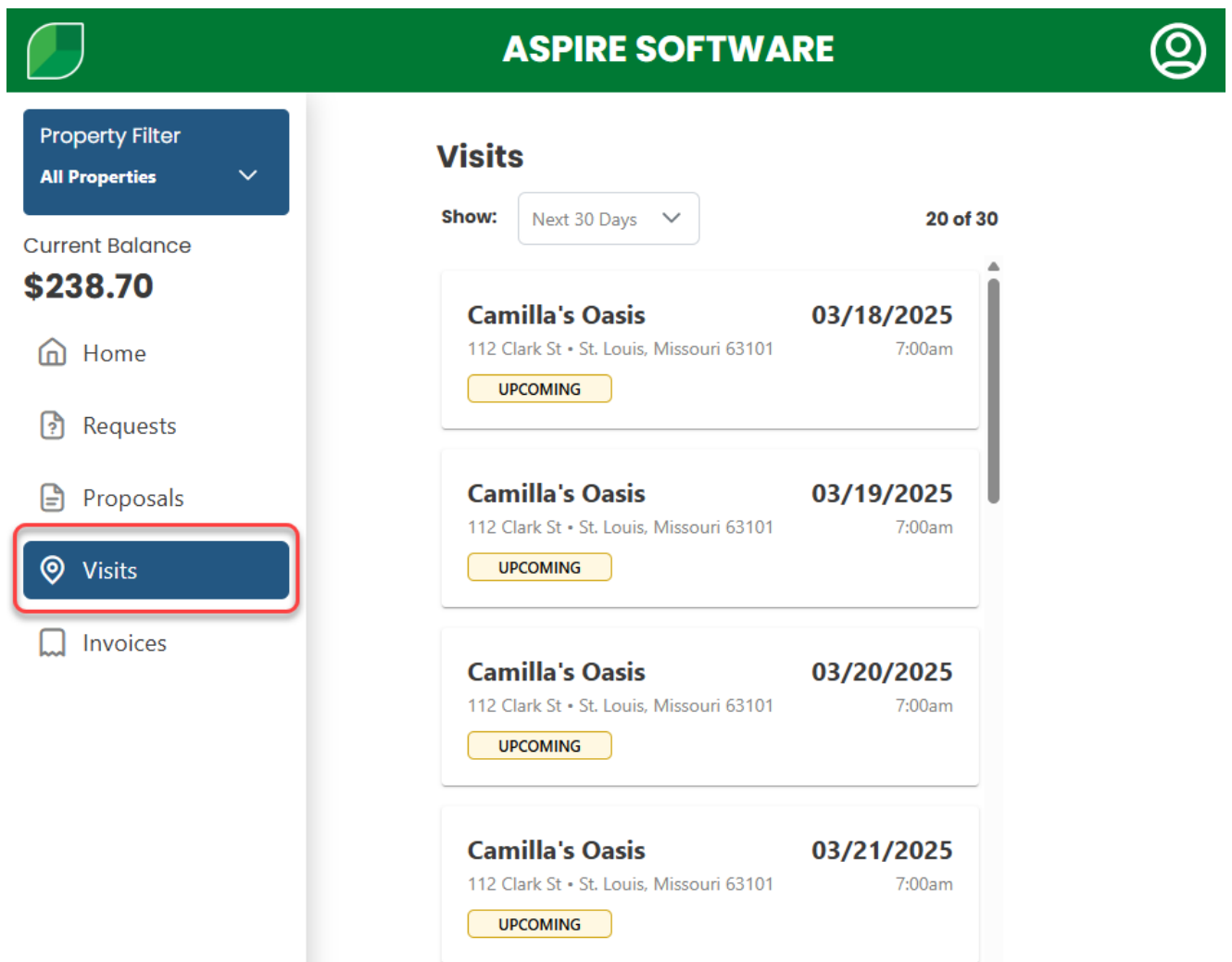
Home  
Requests  
Proposals  
Visits  
Invoices

# 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.



**ASPIRE SOFTWARE**

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

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



ASPIRE SOFTWARE



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 displays the ASPIRE SOFTWARE customer portal interface. On the left, a sidebar contains a 'Property Filter' set to 'All Properties', a 'Current Balance' of '\$238.70', and navigation links for 'Home', 'Requests', 'Proposals', 'Visits' (highlighted), and 'Invoices'. The main content area is titled 'Visits' and shows a list of visits for 'Camilla's Oasis' at '112 Clark St - St. Louis, Missouri 63101'. A modal window is open, displaying details for an upcoming visit on '03/20/2025 7:00am'. The modal includes a yellow 'UPCOMING' tag, the visit date, services scheduled ('Janitorial Daily Clean'), visit notes ('During this visit, our crew leader will make sure all supplies are stocked as needed!'), and the service contact 'Camilla Sailor' with the email 'cseiler@youraspire.com'. A 'Close' button is located at the bottom right of the modal. The background shows a calendar view with dates 03/18/2025, 03/19/2025, 03/20/2025, and 03/21/2025, each with a 7:00am time slot.

## 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 displays the ASPIRE SOFTWARE interface. On the left is a sidebar with a 'Property Filter' set to 'All Properties'. Below this, the 'Current Balance' is shown as '\$238.70'. Navigation links include Home, Requests, Proposals, Visits, and Invoices (which is highlighted). The main section is titled 'Invoices' and shows '3 of 3' items. A dropdown menu is open, allowing selection of 'All', 'Due', or 'Paid' invoices. The 'All' option is currently selected. The invoice list includes:

- Weekly Maintenance** (partially visible)
- Invoice #4: Annual Maintenance Agreement** for Tar Valon Towers • Columbia, Illinois 62236, with a **PAID** status.
- Invoice #18** for Tar Valon Towers • Columbia, Illinois 62236, 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**  
Tar Valon Towers • Columbia, Illinois 62236  
**\$238.70**  
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*.

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!

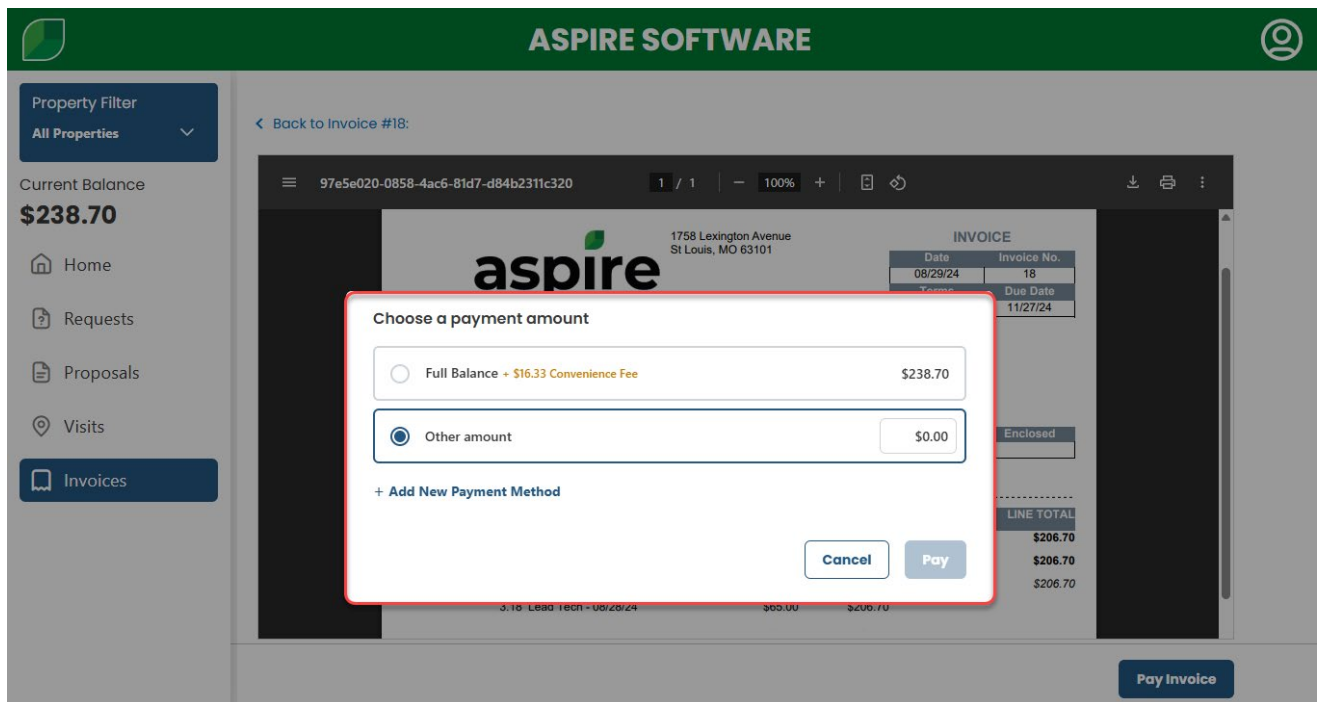
**Clicking** *View Invoice* will allow you to view the *Invoice* in a PDF format. After reviewing the *Invoice*, you can **click** *Pay Invoice* on this screen.

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>
	<i>Irrigation Inspection</i>		\$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
	<i>IR- Irrigation Repair - Emergency</i>		\$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>\$236.70</b>	<b>\$0.00</b>	<b>\$236.70</b>

## Pay Invoice

## 24





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 displays the B.H. GRANING customer portal interface. At the top, a green banner reads 'WELCOME'. On the left sidebar, the 'Requests' link is highlighted with a red circle. The main content area, titled 'Requests', shows a list of requests for the property '224 Gray Mist Lane, Sylva, NC 28779'. The requests are: 'Request #225: Test' (Low Priority, OPEN), 'Request #165: Site Images' (Normal Priority, CLOSED), and 'Request #164: Test for Brian Johnson' (Normal Priority, CLOSED). At the bottom right, the 'Add New Request' button is circled in red.

Request ID	Request Title	Property	Status	Priority
Request #225	Test	224 Gray Mist Lane, Sylva, NC 28779	OPEN	Low
Request #165	Site Images	224 Gray Mist Lane, Sylva, NC 28779	CLOSED	Normal
Request #164	Test for Brian Johnson	224 Gray Mist Lane, Sylva, NC 28779	CLOSED	Normal

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.

The screenshot displays the ASPIRE SOFTWARE portal interface. On the left, a sidebar contains a 'Property Filter' dropdown set to 'All Properties', a 'Current Balance' of '\$238.70', and navigation links for 'Home', 'Requests' (highlighted), 'Proposals', 'Visits', and 'Invoices'. The main content area shows 'Request #19: Leaking Sink' for 'First Bank' in 'St. Louis, MO 63101'. The request status is 'OPEN' and was 'Created 03/10/2024'. Below this, the 'Request Information' section lists the 'Subject' as 'Leaking Sink' and the 'Priority' as 'Normal'. The 'Attachments' section is empty. The 'Comments' section shows a comment from 'Camilla Sailor' dated '03/10/2024' with the text 'Leaking sink in bottom floor'. A red rectangular box highlights the 'Add Comment' modal, which is open in the center. The modal has a title 'Add Comment' and fields for 'Associated Property\*' (set to 'First Bank'), 'Subject\*' (set to 'Leaking Sink'), and 'Priority\*' (set to 'Normal'). It also includes an 'Attachments' section with a note '(Each attachment can only be 10MBs, limit of 5)' and an 'Add Attachment' button. A 'Comment\*' text area is at the bottom, followed by 'Cancel' and 'Add Comment' buttons. A blue circular help icon with a question mark is located at the bottom right of the page.

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.