

# Contact Entry in Aspire

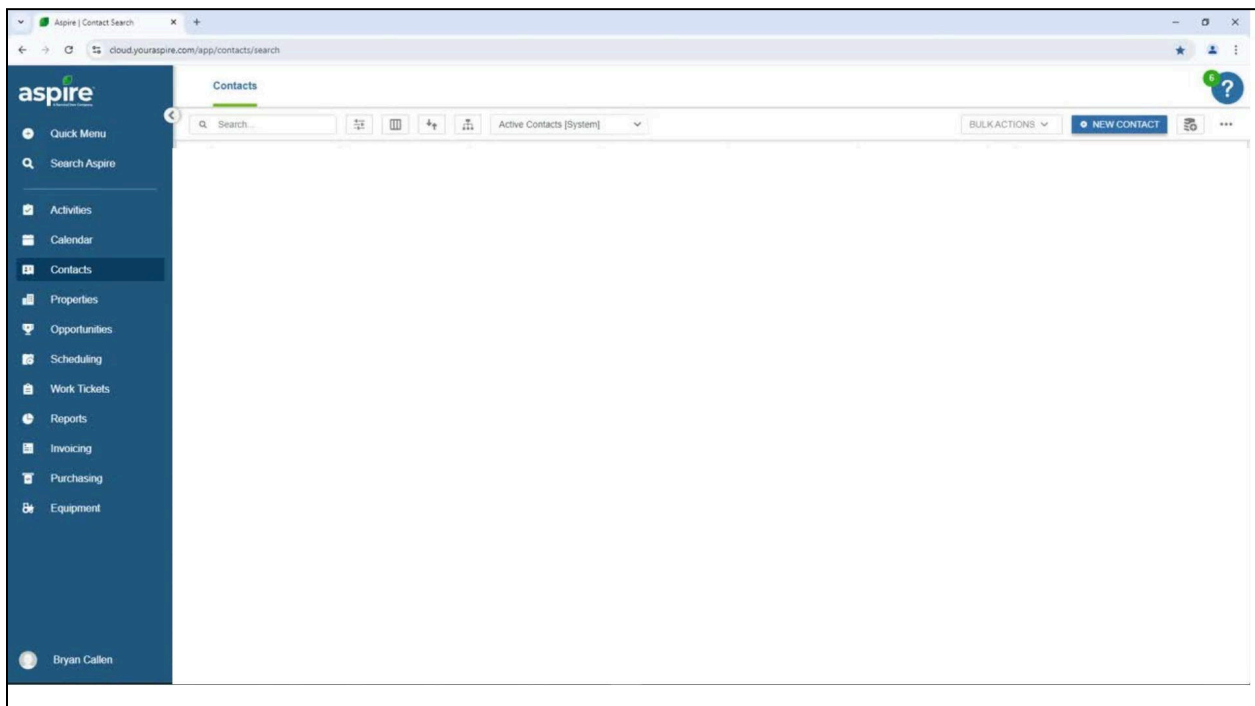
Contact in Aspire serves as a powerful tool for maintaining the details of customers, vendors, and employees. By capturing comprehensive information such as names, addresses, phone numbers, and email IDs, it facilitates easy access to essential contact details, contributing to seamless interactions and meaningful connections.

This job aid will walk you through the process of updating your personal, contact, and owner details on Aspire. Following these steps ensures your information is accurate and up to date for seamless communication.

## Steps:

### 1. Navigate to Contacts

In Aspire, start by going to the 'Contacts' section and click on "New Contact."



## 2. Enter Your Details

Fill in your first and last names, email address, and phone number. Ensure the email you provide is current and regularly used for communications, and update your mobile number for effective contact.

The screenshot shows the 'New Contact' form in the Aspire CRM system. The form is partially filled with the following information:

- Prefix: Select One
- Company: Select One
- Contact Type: Select One
- First Name: James
- Last Name: Smt
- Email: Jamesmit123@gmail.com
- Primary Address Line 1: (empty)
- Primary ZIP: (empty)
- Mobile Phone: 3756

Red boxes highlight the First Name, Last Name, Email, and Mobile Phone fields.

## 3. Enter Address and Select Contact Type

Input your complete address, including street, city, state, and zip code. Then, choose the appropriate contact type from the dropdown menu.

The screenshot shows the 'New Contact' form in the Aspire CRM system, now fully filled with the following information:

- Prefix: Mr.
- Company: Select One
- Contact Type: Customer
- First Name: James
- Last Name: Smt
- Email: Jamesmit123@gmail.com
- Primary Address Line 1: 125 Adam st
- Primary ZIP: 30060
- Primary City: Marietta
- Primary State: Georgia
- Mobile Phone: 3756

Red boxes highlight the Primary Address Line 1, Primary ZIP, Primary City, Primary State, and Contact Type fields.

#### 4. Enter Additional Details

If applicable, go to the 'Additional Information' section to update the 'Owner Details' or any other relevant information.

The screenshot shows the 'New Contact' form in the Aspire CRM. The 'Additional Information' section is highlighted with a red box. The form includes the following fields:

- Owner: Aspire Admin (dropdown)
- Secondary Address Line 1: (text input)
- Secondary State: Select One (dropdown)
- Website: (text input)
- Secondary Address Line 2: (text input)
- Secondary ZIP: (text input)
- Tags: (dropdown)
- Secondary City: (text input)

Other visible fields include: Prefix (Mr.), Company (Select One), Contact Type (Customer), First Name (James), Title, Branch (Main- Woodstock), Last Name (Smt), Email (Jamesmit123@gmail.com), Prospect Rating (Select One), Primary Address Line 1 (125 Adam st), Primary ZIP (30060), Mobile Phone (986-4485-8756), Primary Address Line 2, Office Phone, Primary City (Marietta), Home Phone, Primary State (Georgia), and Fax.

#### 5. Save Your Changes

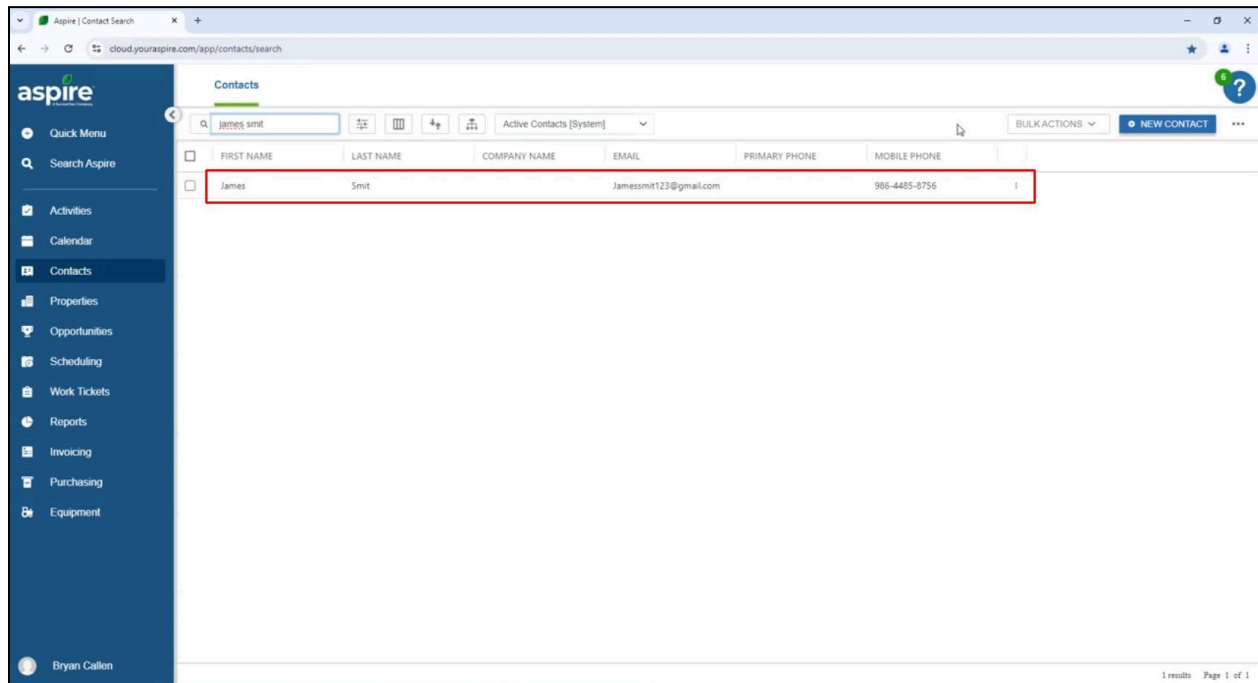
Review all the information, then click "Save" to apply your updates.

The screenshot shows the 'New Contact' form in the Aspire CRM. The 'SAVE' button is highlighted with a red box. The form includes the following fields:

- Prefix: Mr. (dropdown)
- Company: Select One (dropdown)
- Contact Type: Customer (dropdown)
- First Name: James
- Title: (text input)
- Branch: Main- Woodstock (dropdown)
- Last Name: Smt
- Email: Jamesmit123@gmail.com
- Prospect Rating: Select One (dropdown)
- Primary Address Line 1: 125 Adam st
- Primary ZIP: 30060
- Mobile Phone: 986-4485-8756
- Primary Address Line 2: (text input)
- Office Phone: (text input)
- Primary City: Marietta
- Home Phone: (text input)
- Primary State: Georgia (dropdown)
- Fax: (text input)
- Owner: Aspire Admin (dropdown)
- Secondary Address Line 1: (text input)
- Secondary State: Select One (dropdown)
- Website: (text input)
- Secondary Address Line 2: (text input)
- Secondary ZIP: (text input)
- Tags: (dropdown)
- Secondary City: (text input)

## 6. Search for the Contact

Finally, search for the contact in the list to confirm it has been successfully entered into Aspire.



Keeping your personal, contact, and owner details updated in Aspire is crucial for efficient communication and smooth operations. By following the outlined steps, you ensure that all essential information is accurate and easily accessible, helping to maintain strong connections with customers, vendors, and employees. Regularly updating your contact information supports better coordination and improves the overall user experience within Aspire.