

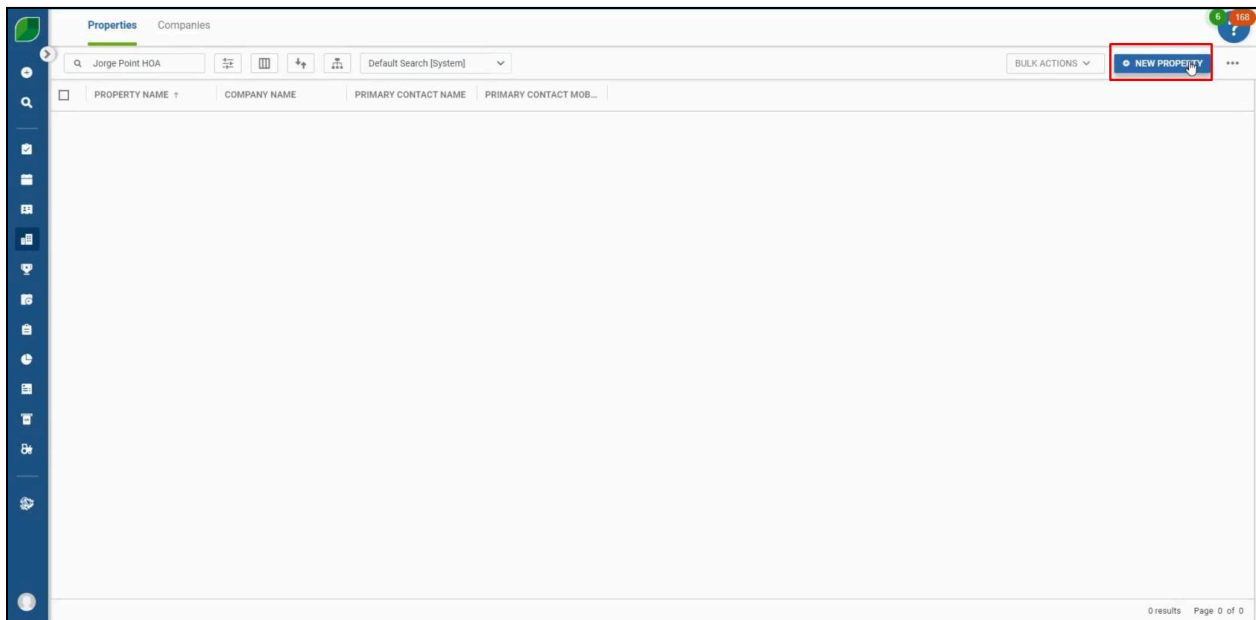
Property Entry in Aspire

The Property Tab in Aspire serves as a central hub for registering properties and companies, ensuring that all necessary details are captured for efficient management. This includes key information such as property addresses, primary contacts, account owners, property types (residential or commercial), branch details, tax jurisdictions, and payment terms.

Accurate property entry is crucial for smooth operations, including the generation of precise estimates, invoices, and maintaining clear records. This job aid will guide you through the step-by-step process of creating a new property in Aspire, helping you streamline invoicing and payment management.

Steps to Enter a Property:

- 1. Navigate to 'Properties' & Select 'New Properties':**
 - On your Aspire dashboard, locate and click on 'Properties.'
 - From the 'Properties' section, click on 'New Properties' to begin entering details for a new property.



2. Enter 'Property Name' and 'Property Status':

- Input the name of the property.
- Opt for paperless invoices to streamline billing and reduce paper usage.
- Choose the appropriate branch for the property from the drop-down menu.

The screenshot shows the 'New Property' form in a software application. The form is titled 'New Property' and includes various input fields and dropdown menus. Two red boxes highlight the 'Property Name' field (containing 'Jorge Point HOA') and the 'Branch' dropdown menu. Other fields include 'Property Name Abbreviation', 'Tax Jurisdiction', 'Payment Terms', 'Locality', 'Address Line 1', 'Address Line 2', 'City', 'State', 'ZIP', 'Industry', 'Competitor', 'Sequence Number', and 'Integration Identifier'. There are also checkboxes for 'Separate Invoices' and 'Paperless Invoices'. A 'Property Notes' section is visible on the right side of the form.

3. Set 'Payment Terms' to Due on Receipt:

- In the payment terms section, select 'Due on Receipt' to ensure prompt payment upon invoicing.

The screenshot shows the 'New Property' form in a software application, with the 'Payment Terms' dropdown menu open. The 'Due on Receipt' option is highlighted with a red box. The form is titled 'New Property' and includes various input fields and dropdown menus. The 'Payment Terms' dropdown menu is open, showing options: 'AutoPay', 'Due on Receipt', 'Net 10', 'Net 15', 'Net 30', and 'Net 60'. Other fields include 'Property Name', 'Property Name Abbreviation', 'Branch', 'Property Status', 'Account Owner', 'OPS Manager', 'Property Group', 'Tags', 'Additional Users', 'Property Type', 'Tax Jurisdiction', 'Locality', 'Annual Budget', 'GEO Perimeter', 'Address Line 1', 'Address Line 2', 'City', 'State', 'ZIP', 'Industry', 'Competitor', 'Sequence Number', and 'Integration Identifier'. There are also checkboxes for 'Separate Invoices' and 'Paperless Invoices'. A 'Property Notes' section is visible on the right side of the form.

4. Update the 'Address':

- Enter or update the full address of the property, ensuring accuracy for delivery and contact purposes.
- Select Industry type.

The screenshot shows the 'New Property' form in a software application. The form is divided into several sections. The 'Address' section is highlighted with red boxes, showing 'Address Line 1' with the value '15 ST Jorge Point' and 'Industry' with the value 'Commercial'. Other fields include Property Name, Property Name Abbreviation, Branch, Property Status, Account Owner, OPS Manager, Property Group, Tags, Additional Users, Property Type, Tax Jurisdiction, Payment Terms, Locality, Website, Lead Source, Annual Budget, GEO Perimeter, City, State, ZIP, Competitor, Sequence Number, and Integration Identifier. A 'Property Notes' section is visible on the right side of the form.

5. Update 'Account Owner' and Select 'Property Status':

- Enter Account Owner.
- Select the property status from the drop down.
- Select lead source.

The screenshot shows the 'New Property' form in a software application, showing updates to 'Account Owner' and 'Property Status'. The 'Property Status' is set to 'Customer' and the 'Account Owner' is highlighted with a red box. The 'Lead Source' is set to 'Call In', also highlighted with a red box. The 'Industry' is set to 'Commercial'. The 'Contact Information' section is visible at the bottom of the form.

6. Update 'Primary Contact' & 'Billing Contact' and Click "Save":

- Input or update the details for both the primary contact and the billing contact for the property.
- Click "Save" to store all the information in Aspire

The screenshot shows the 'New Property' form in Aspire. The 'Contact Information' section is highlighted with a red box. It contains fields for Primary Contact (James Smith), Billing Contact (James Smith), Company, and Address (15 ST Jorge Point Kutaisi, GA 60545). Other fields include OPS Manager, Property Group, Tags, Additional Users, Property Type, Lead Source, Annual Budget, GEO Perimeter, Industry, Competitor, Sequence Number, Integration Identifier, Inside Sales Rep, Builder, and Lawn Care Sub.

7. Review all the details:

- Review all the information.

The screenshot shows the 'Jorge Point HOA' property details page in Aspire. The page displays account information (Account Owner, Earned Revenue, Gross Margin), contact information (Primary Contact, Billing Contact, Company, Address), and a table of Opportunities. The 'Next Activity' and 'Attachments' sections are also visible.

OPPORTUNITY	DIVISION	STATUS	VALUE	PROBABILITY	ANTIC. CLOSE
Totals			\$0	0%	

Following these steps will ensure that the new property is set up correctly in Aspire, with all necessary details, such as billing preferences, contacts, and operations, properly assigned. Accurate data entry is essential for streamlining management and reporting, helping to make future tasks more efficient and organized. By ensuring all property information is correctly entered from the start, you can avoid potential errors and improve the overall workflow, ultimately contributing to smoother operations and better record-keeping.