



The following document provides definitions of all fields on the Contact & Property Import sheets and items to look out for.

Notes:

- Mistakes created from import are client's responsibility to fix manually in Aspire
- Recommendation: Get comfortable with import first. Example: if loading 1000 contacts do an import of 5 or 10 first to make sure information loads into Aspire as expected.
- When importing information that exists in Aspire, Example: Contact Type or Company Name be sure to confirm spelling in the import sheet matches Aspire exactly.
- The import does not create new admin fields. Example: If a branch is listed on the import sheet that does not exist in Aspire it will not load. Create the branch in admin first.
- Duplicate Properties and Contacts are not flagged. The only field that will flag as a duplicate is contact email address since it must be unique.
- Fields not indicated as required may be left blank
- When importing properties if you want to assign a primary or billing contact it must exist prior to import. Import Contacts first then Import properties.
- If multiple contacts with the same first and last name exist in Aspire it is recommended not to include them as Primary or Billing Contacts on the property import sheet. Aspire will assign the contact created first. Once property is loaded update manually in Aspire.

Contact Import Fields:

Contact Type: Required Field, Choose from Aspire defaults Customer, Prospect, Employee, Sub, Vendor, or custom option if created in admin.

Contact First: Required Field, your contacts first name, if you do not have, use "first"

Contact Last: Required Field, your contacts last name if you do not have, use "last"

Sal: Mr. Mrs. Ms. Dr

Contact Job Title: Contacts job title, Example: Property Manager, Board President, Crew Leader etc.

Office Phone: Contacts Office Phone, phone numbers do not default to a specific format when loaded. Format on the import sheet in the style you would like them to appear. Example: (203)-555-1234 or 203-555-1234



Home Phone: Contacts Home Phone, phone numbers do not default to a specific format when loaded. Format on the import sheet in the style you would like them to appear. Example: (203)-555-1234 or 203-555-1234

Mobile Phone: Contacts Mobile Phone, phone numbers do not default to a specific format when loaded. Format on the import sheet in the style you would like them to appear. Example: (203)-555-1234 or 203-555-1234

Fax Phone: Contacts Fax Phone, phone numbers do not default to a specific format when loaded. Format on the import sheet in the style you would like them to appear. Example: (203)-555-1234 or 203-555-1234

Email: Contact's email address. Emails cannot be duplicated across different contacts. If the email is found when attempting import it will display an error.

Address1: Address of contact. If this is a billing contact a mailed invoice would be sent to this address.

Address2: Address overflow. Example: Suite #, PO Box, Apt #

City: City of this contact. If a billing contact this is the billing city of record.

State: State, If a billing contact this is the billing State of record. Enter as State Abbreviation, not full name of state.

Zip: Zip, If a billing contact this is the billing Zip of record.

Company: Company where the contact is employed.

Property Import Fields:

Property Name: Required, name of the physical location where you go to perform work.

Property Name Abr: Required, will be seen by crews in mobile app. Field is limited to 20 characters

Branch Name: Required, Branch location responsible for this property

Property Status: Required, Choose from Aspire defaults Customer, Prospect, Past Customer, Prior Bid or custom option if created in admin.

Account Owner Name: your employee who is responsible for the overall management of this property.



Address1: the physical address of the property where work is being performed. Crews will see this on mobile device.

Address2: Address overflow. Example: Suite #

City: City where property is located

State: the State where property is located. Enter as state abbreviation, not full name of state.

Zip: the zip code where property is located

Industry Name: Choose from Aspire defaults Commercial, HOA, Hotel, Medical, Multi-Tenant, Residential Retail or custom option if created in admin.

Property Notes: Notes specific to the property. These are internal notes that will not be displayed in other areas of Aspire.

Operation Notes: Notes specific to property when services are being performed. These will be seen by crews in the mobile app and will display across all services. Example: Gate Code 1234, Always remember to check in with Property Manager when arriving. Note: operation notes specific to a service will be entered at the opportunity level and not here.

Primary Contact Name: Enter name of primary person you go to regarding this property. First and Last name must be spelled the same as what is in Aspire contact list. Primary Contact holds the name and company that will display on a proposal.

Billing Contact Name: Billing contact name holds the company name and address information that will print on an invoice in window envelope area. First and Last name must be spelled the same as what is in the Aspire contact list.

Paperless Invoices: Enter a 1 in this field if you want to turn it on. Checking this box specifies when a user completes a batch of invoices containing an invoice for this property Aspire will not include a copy of the invoice in the batch of printable invoices. Note: This setting does not email the client an invoice only suppresses the print version. Designating the contact that would receive an emailed invoice would be done within Aspire.

Payment Terms: Choose from Aspire defaults Due on Receipt, Net 10, Net 30, Net 90 or custom option if created in admin.