

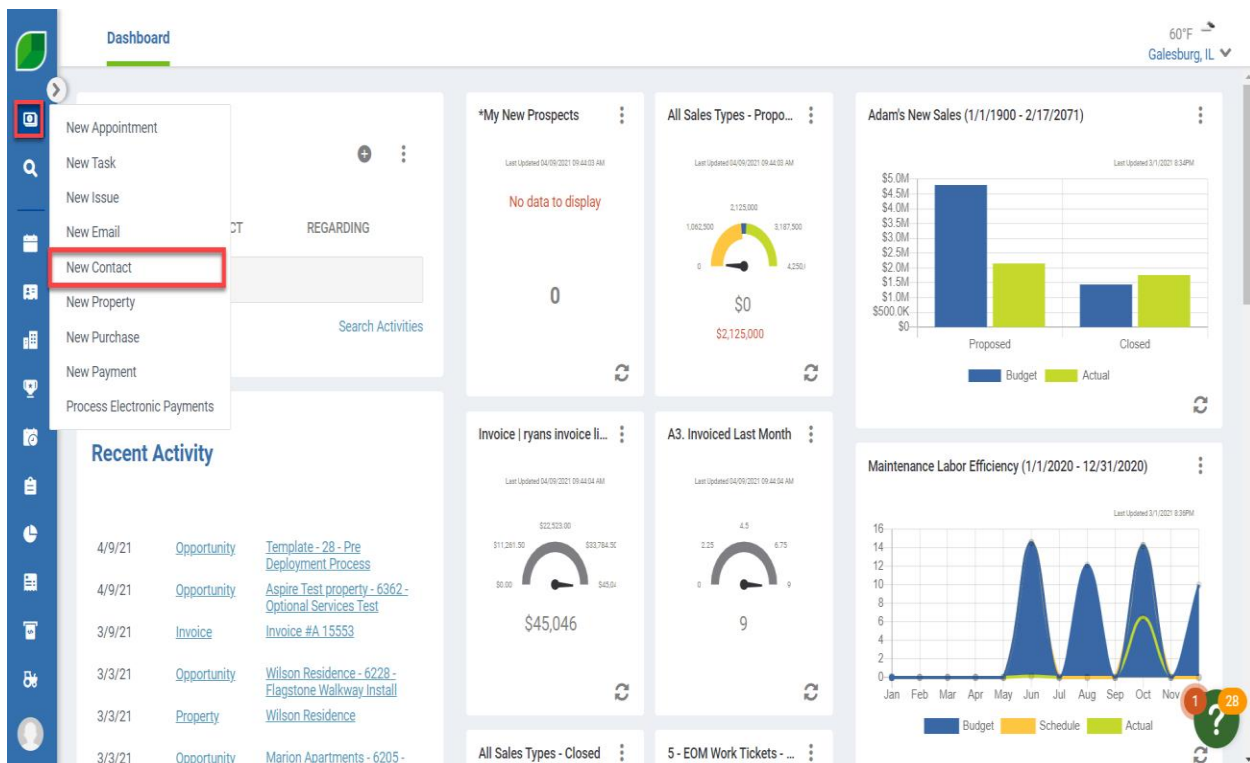
Creating a User

Purpose: Create a user account for a new employee who will be accessing more than Aspire's Mobile Time. To create an employee contact for a crew leader or laborer, go to the article: [Creating a New Crew Employee Contact](#).

Prerequisites:

1. System Admin or
2. Branch admin if enhanced security is checked on the company configuration.
Admin->Pencil->Company->Enhance Branch Admin Security

To create a user for an employee, follow these steps:



The screenshot shows the Aspire software dashboard. On the left side, there is a vertical 'Quick Menu' with various icons. The 'New Contact' option is highlighted with a red box. The dashboard itself contains several widgets: 'My New Prospects' (showing 0), 'All Sales Types - Proposed' (showing a gauge chart with values 0, 2,125,000, and 1,187,000), 'Adam's New Sales (1/1/1900 - 2/17/2071)' (showing a bar chart comparing Budget and Actual sales), 'Recent Activity' (showing a list of recent transactions), 'Invoice | ryans invoice li...' (showing a gauge chart with values \$11,281.00, \$22,523.00, and \$33,784.30), 'A3. Invoiced Last Month' (showing a gauge chart with values 0, 2.20, 4.5, and 6.75), and 'Maintenance Labor Efficiency (1/1/2020 - 12/31/2020)' (showing a line chart comparing Budget, Schedule, and Actual efficiency). The top right corner shows the temperature as 60°F and the location as Galesburg, IL.

1. Hover over the Quick Menu and press New Contact.

Contacts

New Contact Employee Active ☑ 7 SAVE ⋮

Prefix Company 3 Contact Type

2 First Name * Title Branch

Last Name * 4 Email 5 Prospect Rating

Contact Information

Primary Address Line 1 Primary State Mobile Phone

6 Primary Address Line 2 Primary ZIP Home Phone

Primary City Office Phone Fax

Additional Information

Next Activity

Notes

Enter notes here

Attachments Limit 5 files per save

+ UPLOAD FILES 📷 🔍 🗑️ 0


Or Drop files

1 28 ?

2. Fill in the employee's First name, Last name, and Title (if desired).
3. Pick Employee for Contact Type
4. Fill in the employee's work Email Address.
Note: The email address does not have to be an active or real email account. The email address will be used as a user name to log into Aspire.
5. Pick the employee's Branch.
6. Enter in the employee's Primary Address, office and mobile Phone (if desired)
7. Click the 3 dots in the top-right and select Create User.

Contacts

John Doe Employee Active

SAVE 

Prefix: Select One Company: Select One Contact Type: Employee

First Name *: John Title: Branch: Main

Last Name *: Doe Email: Jdoe@aspireisgreat.com Prospect Rating: Hot



Contact Information

Primary Address Line 1: 171 chesterfield airport Primary State: Select One Mobile Phone: 314-999-9999


Primary Address Line 2: Primary ZIP: 63005 Home Phone:




Primary City: Chesterfield Office Phone: Fax:

Additional Information



Next Activity  
None

Notes
Enter notes here

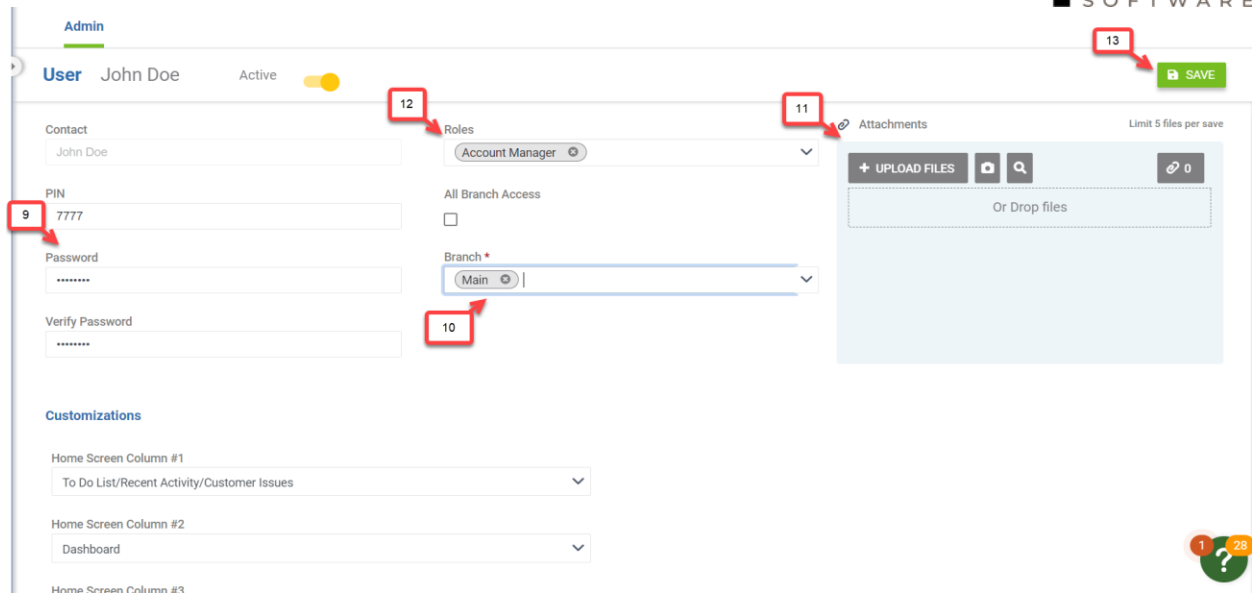
Attachments  Limit 5 files per save

+ UPLOAD FILES    0

Or Drop files

8. Save the Contact by clicking the Green Save button.



9. Enter in a Pin and Password.

Note: The pin and password can be the same or different and the fields are alphanumeric. There is not a minimum number of required characters.

Note: Aspire recommends using a naming convention for developing pins and passwords. Examples: use the employee's ID #, last four of their social security #, or first two letters of their first name, and first four letters of their last name—Tom Smith – tosmit.

10. Type the branch the employee is employed at or select the All Branch Access checkbox.

11. Add any attachments, if desired. Pick the new user's employee's role.

Note: If attachments such as driver's licenses are attached, then anyone with access to view the user can view the attachment.

12. Select the role the user will have. This gives them the rights in the system.

Note: This dictates the employee's system access.

13. Press Save.