Add a Site

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Sites are attached to customer records. To add additional Sites, you must first access the customer record.
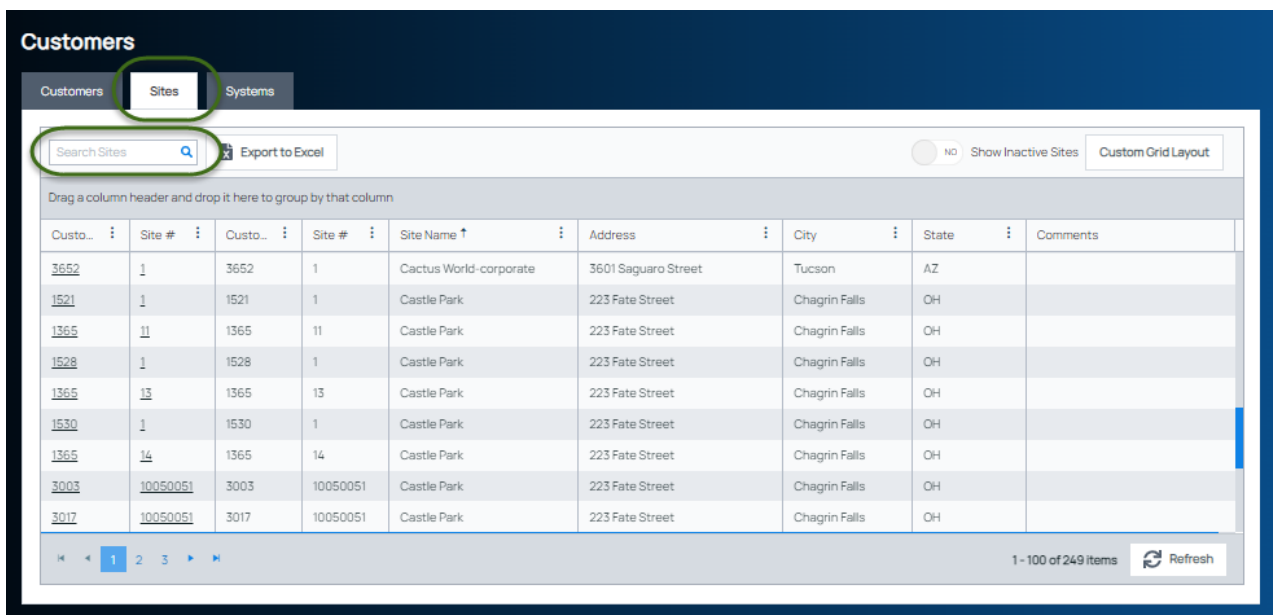
To add an additional site to an existing customer, from the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. If you know the name of the customer to which the Site is attached, locate the Customer, and then click on the hyperlink in the Customer # column to open the customer record.

If you do not know the customer number or customer name to which the Site is attached, however, you do know the Site Name, click on the Sites tab to search for the customer by Site Name.

Search by Site

At the upper left of the page is a search field. You can type in the first four characters of either the customer number or the Site Name to locate the record faster. Once you have located the Site within the list, click on the hyperlink in the Customer # column to open the customer record.

The Customer record opens. Click on the Sites/Systems tab, and then click on the **Add Site** button.

The Add Site data entry form opens. Required fields are denoted with a red bullet next to the field name.

Each data entry field is described below.

Data Entry Fields

- **Use Customer Address**: If the Site address is the same as the customer address, set this toggle button to On, and the address information will fill in with the customer address information.
- ***Site Name**: If the Use Customer Address toggle button was set to On, this field will auto-fill with what was entered for the Customer Name. You can change this if necessary.
- ***Site Number**: Enter a number for the site, typically 1.
- ***Address**: If you did not select to use the Customer Address, enter the Site address information.
- ***Timezone**: Select the time zone for the site.
- **Phone**: Enter the telephone number for the site.
- ***Email**: Enter the email address for the site.
- ***Sales Tax**: From the drop-down list, select the Sales Tax code that applies to this site. If this site is non-taxable, you still need to select a value in this field. Sales Tax codes are maintained in setup (Setup > Accounting > Sales Tax).
- **Tax Exempt**: If a value is entered into this field, no sales tax will be calculated on any invoice for this site.
- ***Site Since**: Enter the date the person or company became your customer. Typically the date on which the customer signed a contract with your company.
- **Inactive**: If the site is inactive, set this to ON.
- **Inactive Date**: If the site is inactive, enter the date it became inactive.

- ***Branch**: From the drop-down list, select the appropriate branch code for the site. Branch codes are maintained in setup (Setup > Accounting > Branches).
- **Warranty Start Date**: If there is already an installed system at the site, enter the start date of your warranty for the site.
- **Warranty Labor**: From the drop-down list, select the appropriate warranty code for labor charges on work orders. Warranty codes are maintained in setup (Setup > Operations > Warranty Types).
- **Warranty Part**: From the drop-down list, select the appropriate warranty code for part charges on work orders. Warranty codes are maintained in setup (Setup > Operations > Warranty Types).
- **Service Level**: From the drop-down list, select the appropriate service level that will be used in calculating billable charges on work orders. Service Level codes are maintained in setup (Setup > Operations > Service Levels).
- **Comments**: This is a free-form text field to enter any important information related to the site. Many companies will type in directions to the site address. These comments appear on the site detail page. A maximum of 250 characters is allowed.

Fill in the form, and then click the **Save** button.