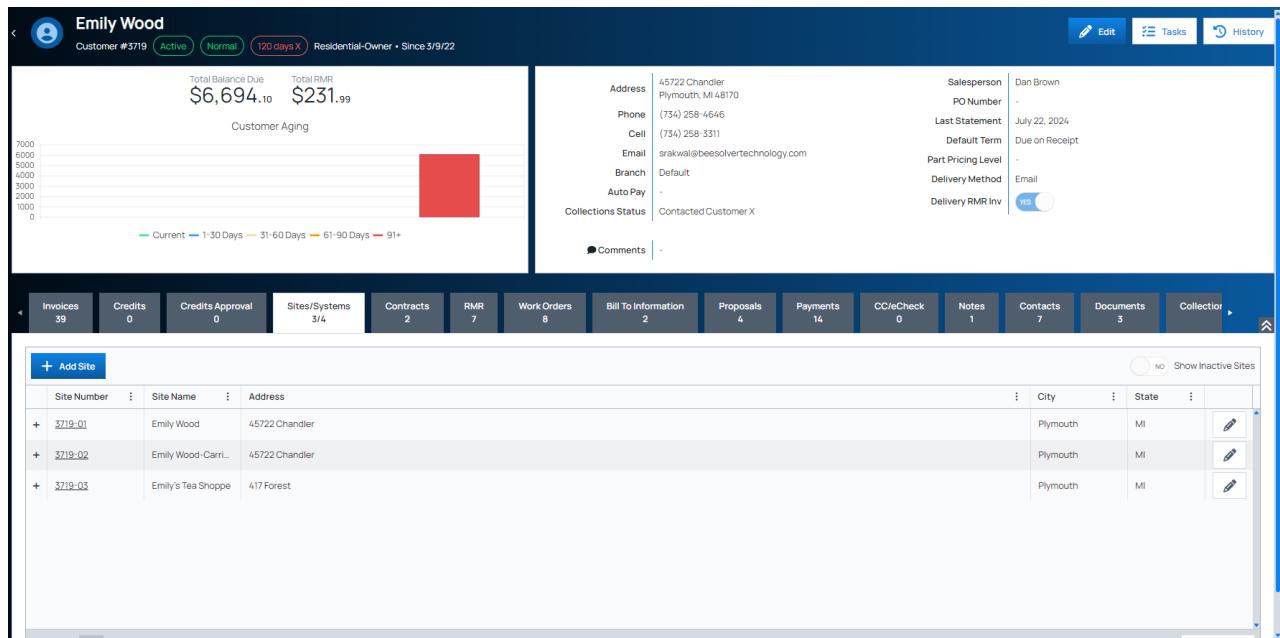


# Add a Site

Last Modified on 12/11/2025 2:17 pm EST

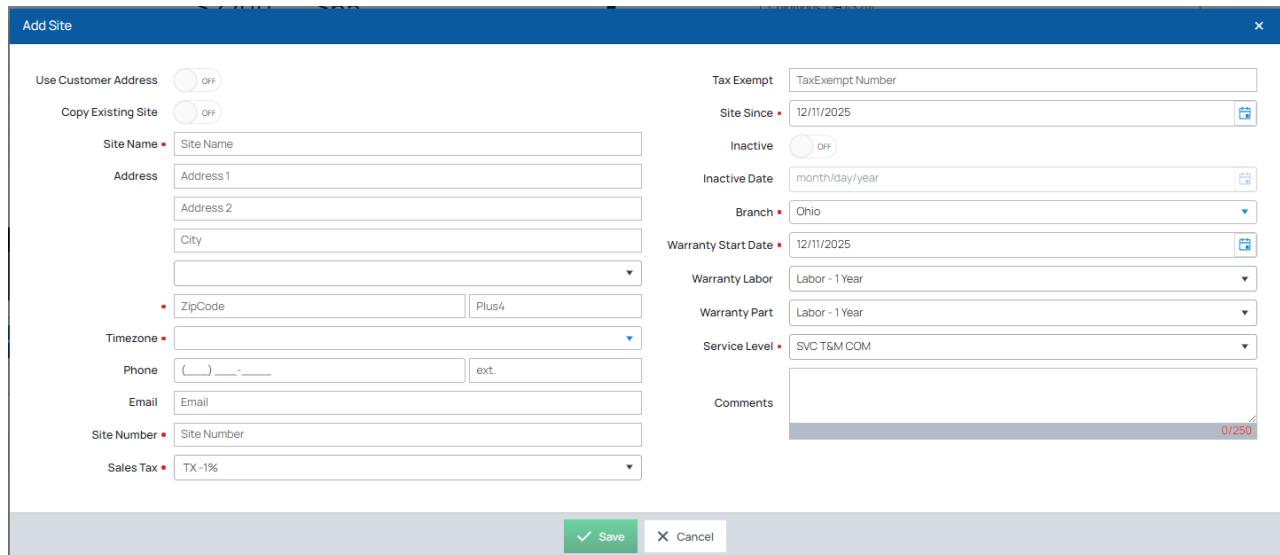
Sites are attached to customer records. To add a site, open the customer detail page: CRM > Customers > Customer # hyperlink.

On the customers detail page, click the Sites/Systems tab.



The screenshot shows the 'Emily Wood' customer detail page. The top navigation bar includes 'Edit', 'Tasks', and 'History' buttons. The main content area displays a summary of invoices, credits, and site information. The 'Sites/Systems' tab is selected, showing a list of existing sites: 'Emily Wood' (Site Number 3719-01, Address 45722 Chandler), 'Emily Wood-Carri...' (Site Number 3719-02, Address 45722 Chandler), and 'Emily's Tea Shoppe' (Site Number 3719-03, Address 417 Forest). A 'Comments' section is present at the bottom. The bottom navigation bar includes links for Invoices, Credits, Credits Approval, and various service modules.

Click the **Add Site** button. The Add Site form opens. Required fields are denoted with a red dot next to the field name.



The 'Add Site' form is displayed. It includes fields for 'Use Customer Address' (switch off), 'Copy Existing Site' (switch off), 'Site Name' (Site Name), 'Address' (Address 1, Address 2, City, ZipCode), 'Timezone' (Timezone), 'Phone' (Phone, ext.), 'Email' (Email), 'Site Number' (Site Number), and 'Sales Tax' (Sales Tax). On the right side, there are additional fields: 'Tax Exempt' (TaxExempt Number), 'Site Since' (Site Since, 12/11/2025), 'Inactive' (Inactive switch off), 'Inactive Date' (Inactive Date, month/day/year), 'Branch' (Branch, Ohio), 'Warranty Start Date' (Warranty Start Date, 12/11/2025), 'Warranty Labor' (Warranty Labor, Labor - 1 Year), 'Warranty Part' (Warranty Part, Labor - 1 Year), 'Service Level' (Service Level, SVC T&M COM), and a 'Comments' text area (0/250). At the bottom are 'Save' and 'Cancel' buttons.

If you click the Copy Existing Site switch so that it is on, there are additional fields:

Add Site

Use Customer Address  OFF

Copy Existing Site  ON

Customer

Customer Site

Site Name **\***

Address

Address 2

City

Ohio

ZipCode  Plus4

Timezone

Phone  ext.

Email

Site Number **\***

Sales Tax **\***

Tax Exempt  TaxExempt Number

Site Since **\***

Inactive  OFF

Inactive Date  month/day/year

Branch **\***

Warranty Start Date **\***

Warranty Labor

Warranty Part

Service Level **\***

Comments

## Data Entry Fields

- **Use Customer Address:** If the Site address is the same as the customer address, set this toggle switch to ON, and the address information will fill in with the customer address information.
- **Copy Existing Site:** To copy an existing site from another customer, set this toggle switch to ON. Turning this on adds fields.
- **\*Site Number:** Enter a number for the site, typically 1.: Select a customer to copy a site from.
- **Customer Site:** Select a site to copy from.
- **\*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.
- **\*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.
- **\*Site Number:** Enter a number for the site, typically 1.
- **\*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).

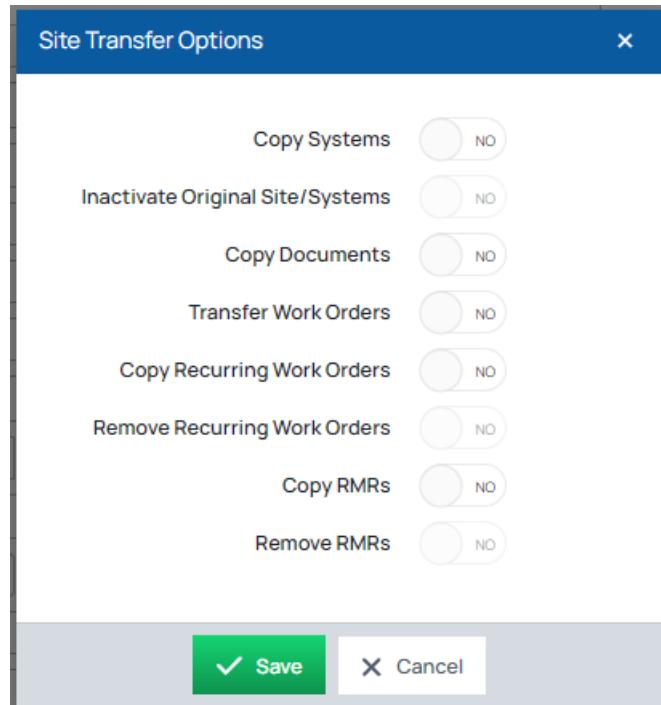
- **Comments:** This is a free-form text field to enter any important information related to the site. Many companies will type in directions to the site address. These comments appear on the site detail page. A maximum of 250 characters is allowed.

Fill in the form, and then click the **Save** button. If you selected to copy an existing site, when you click Save, the Site Transfer Options form opens.

## Site Transfer Options (Pro)

The Site Transfer Options is a Pro license level feature.

Use this to select what you want to copy from the site you selected. You do not need to transfer or copy any.



The dialog box is titled "Site Transfer Options" and contains eight toggle switches. Each switch has a label and a "NO" option. The labels are: "Copy Systems", "Inactivate Original Site/Systems", "Copy Documents", "Transfer Work Orders", "Copy Recurring Work Orders", "Remove Recurring Work Orders", "Copy RMRs", and "Remove RMRs". At the bottom are two buttons: a green "Save" button with a checkmark icon and a white "Cancel" button with a cross icon.

Option	Setting
Copy Systems	NO
Inactivate Original Site/Systems	NO
Copy Documents	NO
Transfer Work Orders	NO
Copy Recurring Work Orders	NO
Remove Recurring Work Orders	NO
Copy RMRs	NO
Remove RMRs	NO

**Copy Systems:** If YES, this copies all the systems associated with the existing site onto the new site.

**Inactivate Original Site/Systems:** If YES, this marks the site being copied from as inactive.

**Copy Documents:** If YES, this copies all the documents that exist on the site over to the newly created site.

**Transfer Work Orders:** If YES, this moves all existing active work orders that were previously associated with the site over to the newly created site. All closed work orders remain associated with the previous site.

**Copy Recurring Work Orders:** If YES, this recreates all recurring work orders that existed for the site being copied from onto the newly created site.

**Remove Recurring Work Orders:** If YES, this removes the recurring work orders from the site being copied.

**Copy RMRs:** If YES, this recreates all RMR that existed for the site being copied from onto the newly created site.

**Remove RMRs:** If YES, this removes the RMR from the site being copied.

