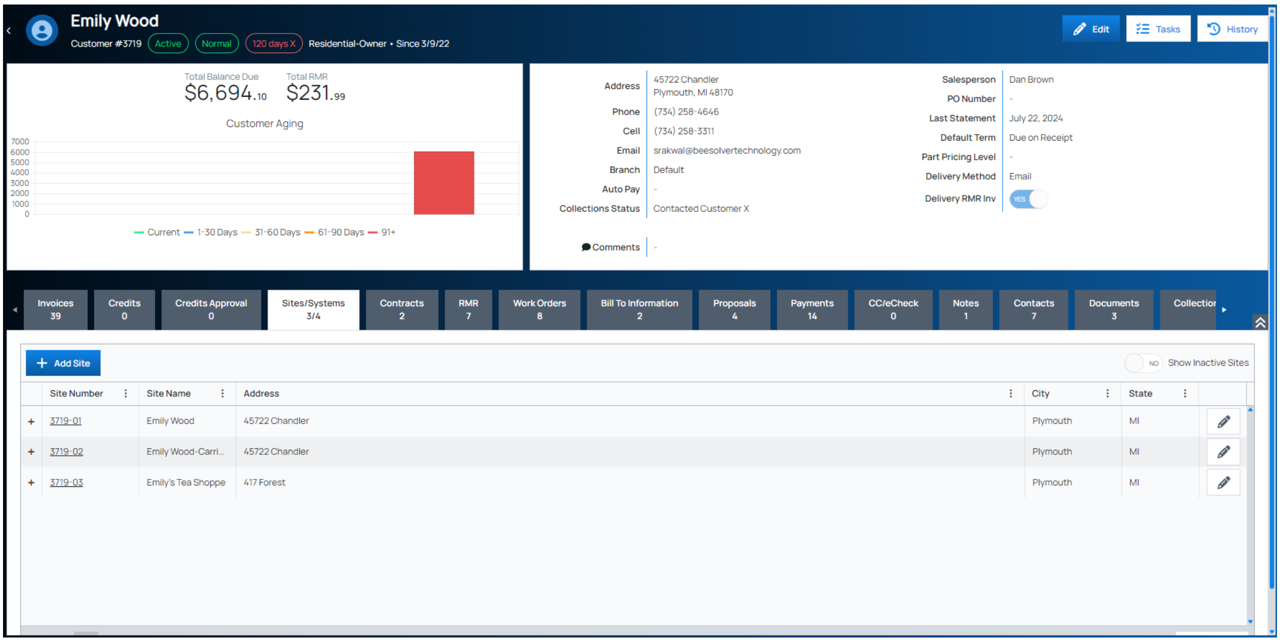
Add a Site

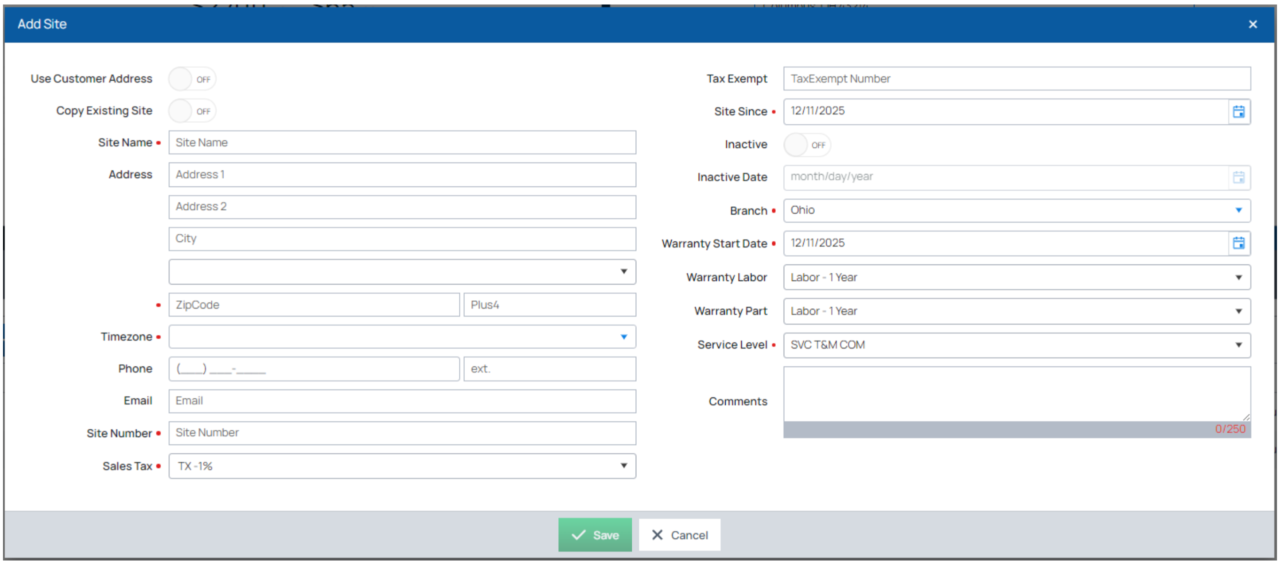
Last Modified on 12/11/2025 2:17 pm EST

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

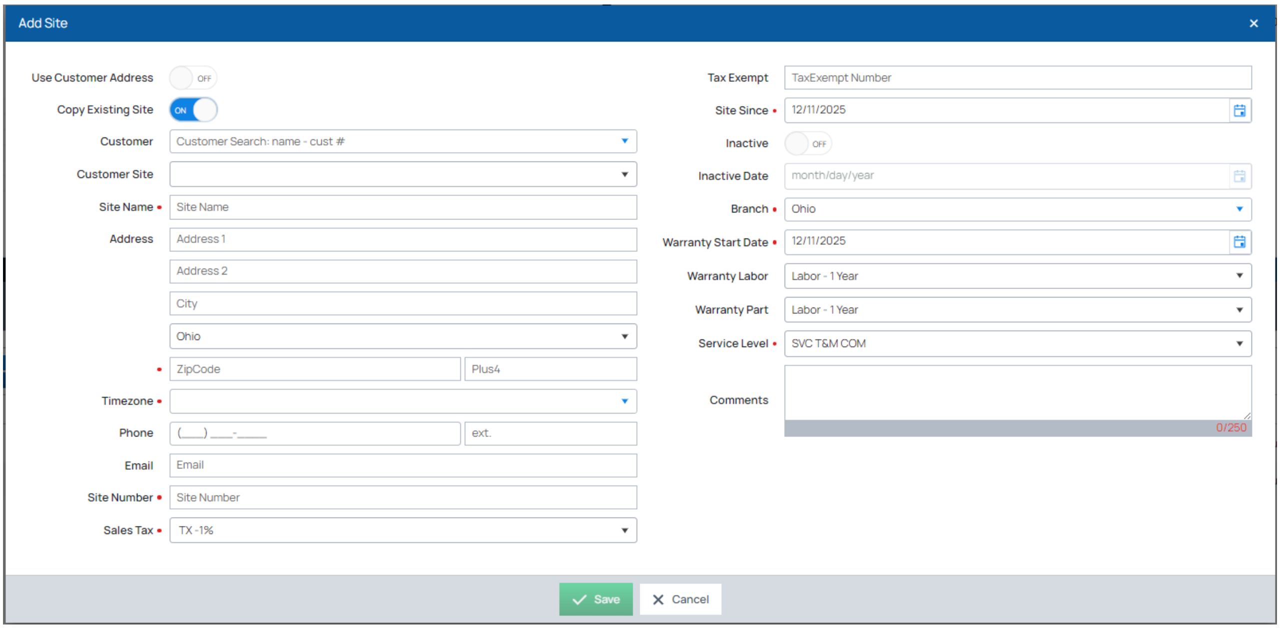
On the customers detail page, click the Sites/Systems tab.



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



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



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).

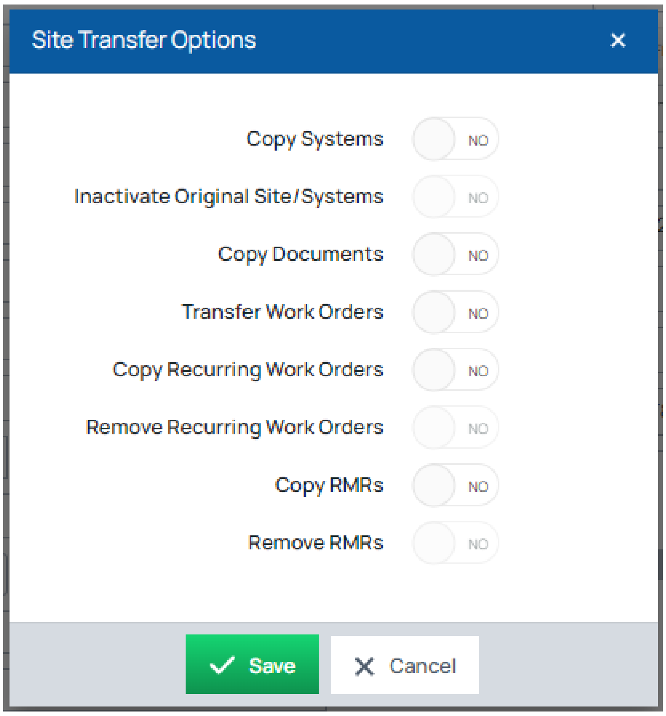
- **Comments**: This is a free-form text field to enter any important information related to the site. Many companies will type in directions to the site address. These comments appear on the site detail page. A maximum of 250 characters is allowed.

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.



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.