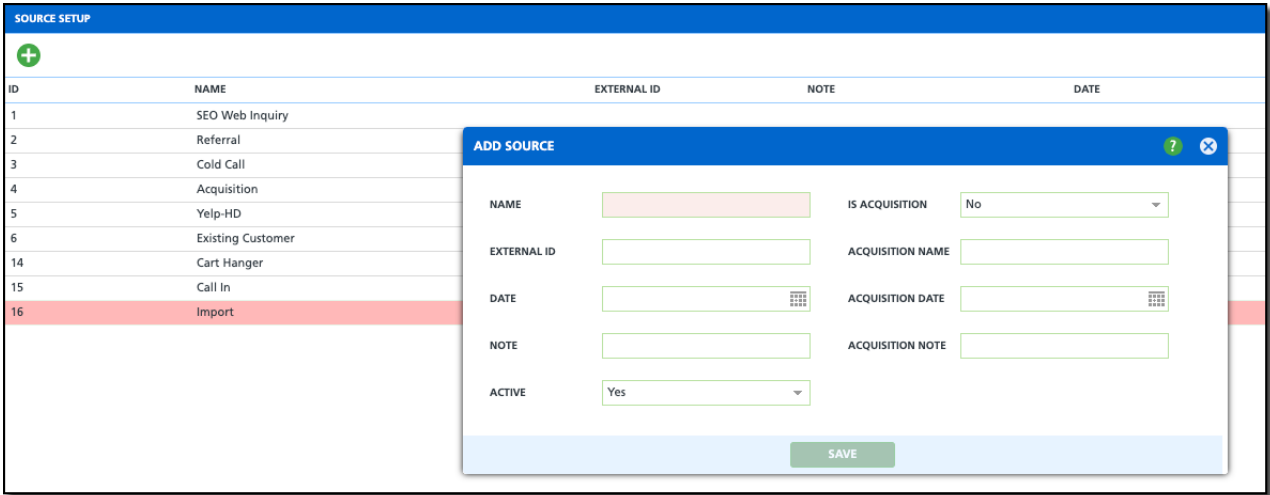# Source Setup

Last Modified on 04/26/2024 3:21 pm EDT

Pathway: *Setup > Account > Source*

Source Setup controls what displays for selection in the Source drop down field when a new account is created. Source identifies how an account originated and may help in future marketing and sales campaigns.

Permissions

The following permission is required to view, add and edit the Source Setup screen:

Permission ID	Permission Name
23	Setup \ Account

Add Source Field Descriptions

Field	Description
Name	Enter the Name of the source that displays for users to select.
External ID	
Date	
Note	
Active	Controls if the source is available for selection when adding an account/site.
Is Acquisition	Indicates whether or not this source is an acquisition.
Acquisition Name	Name of the acquisition.
Acquisition Date	Date the acquisition happened.
Acquisition Note	Any added notes for this acquisition.

Add New Source

1. Click the **+** to display the Add Source editor.
2. Enter a **Name** for the source.
3. Select 'Yes' from the **Active** drop down field to activate the source for use.
4. Follow your established practice and procedures to complete other fields.
5. Click **Save** when finished.