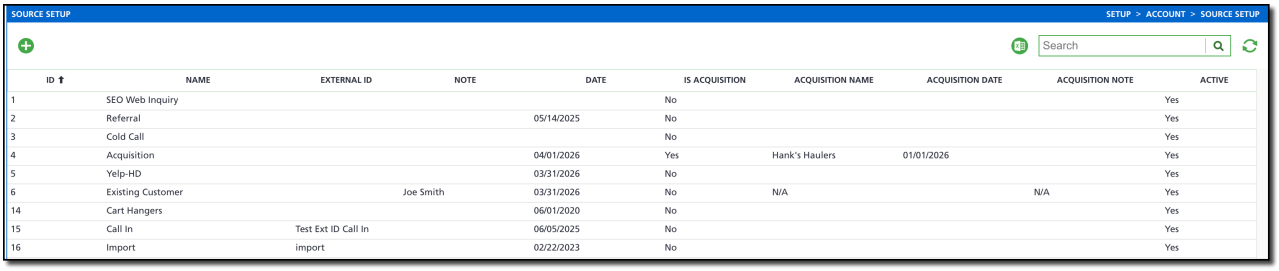
# Source Setup

Last Modified on 10/09/2026 1:02 pm PDT

**Pathway:** *Setup > Account > Source*

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



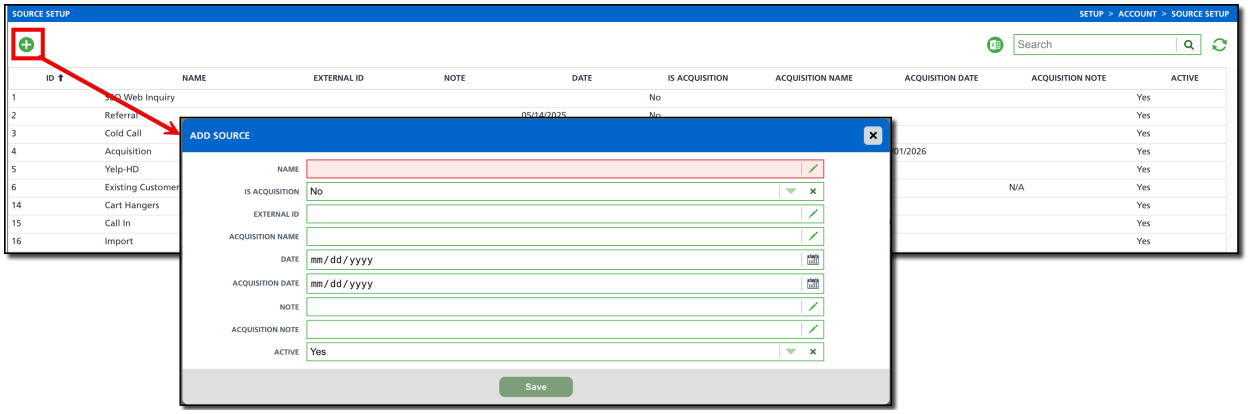

| ID | NAME | EXTERNAL ID | NOTE | DATE | IS ACQUISITION | ACQUISITION NAME | ACQUISITION DATE | ACQUISITION NOTE | ACTIVE |
|---|---|---|---|---|---|---|---|---|---|
| 1 | SEO Web Inquiry | | | | No | | | | Yes |
| 2 | Referral | | | 05/14/2025 | No | | | | Yes |
| 3 | Cold Call | | | | No | | | | Yes |
| 4 | Acquisition | | | 04/01/2026 | Yes | Hank's Haulers | 01/01/2026 | | Yes |
| 5 | Yelp-HD | | | 03/31/2026 | No | | | | Yes |
| 6 | Existing Customer | | Joe Smith | 03/31/2026 | No | N/A | | N/A | Yes |
| 14 | Cart Hangers | | | 06/01/2020 | No | | | | Yes |
| 15 | Call In | Test Ext ID Call In | | 06/05/2025 | No | | | | Yes |
| 16 | Import | import | | 02/22/2023 | No | | | | Yes |

### Field Descriptions

| Field | Description |
|---|---|
| **Name** | The name of the origin (source) of where business came from. Examples include call-in, referral, cold call, and existing customer. This field is limited to 50 characters. |
| **External ID** | The source's ID from the legacy system imported during conversion. |
| **Note** | Additional information about the Source. |
| **Date** | The date the source was added to the system. |
| **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** | The name of the company acquired. |
| **Acquisition Date** | The date when the acquisition happened. |
| **Acquisition Note** | Additional information about the acquisition. |
| **Active** | Controls if the source is available for selection when adding an account/site. |

## Add a Source

To add a Source, use the following steps. Once created and active the source is required and is displayed when creating an account.




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

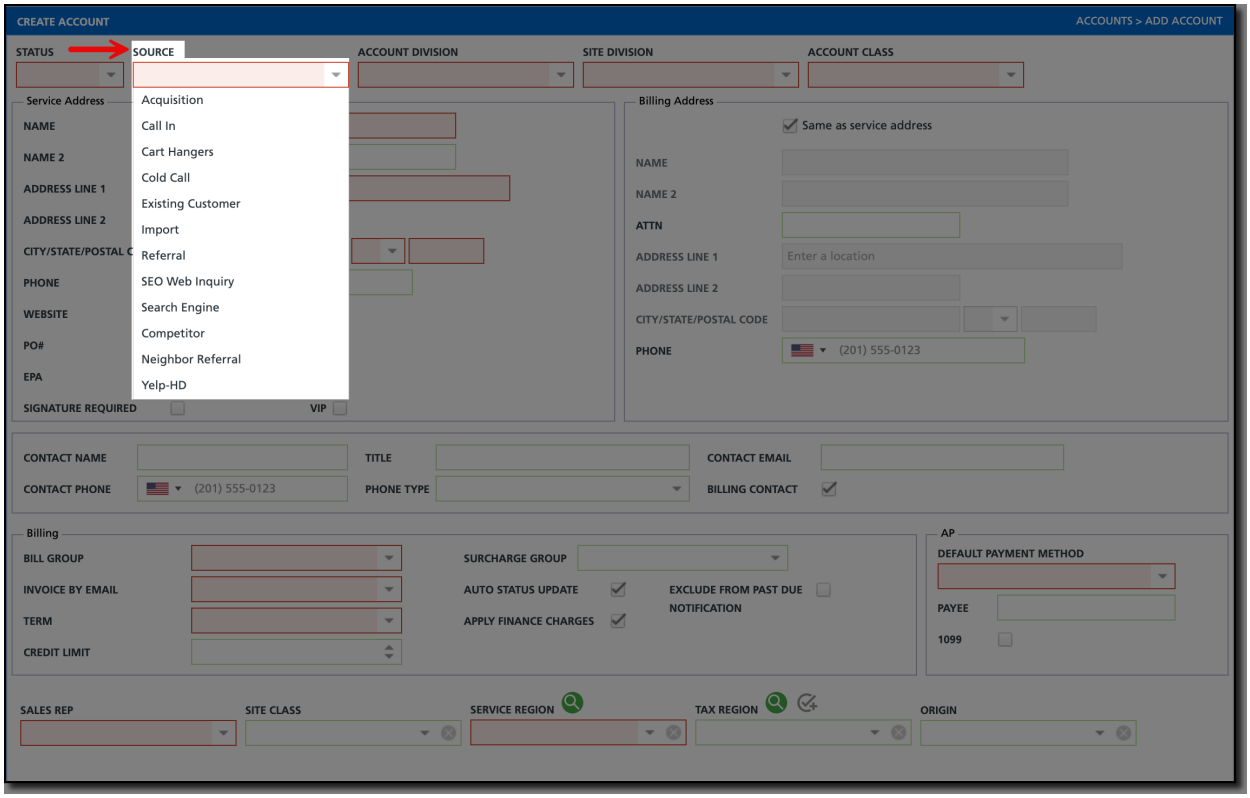
## Edit/Deactivate a Source

To edit or activate/deactivate an existing Source, use the following steps.

1. Double click on the source to be modified.
2. Edit fields displayed based on your established practice and procedures
3. Select '**No**' from the **Active** drop down field to disable the source. If disabled, it will no longer show as an option in the Source dropdown list for an account or site.
4. Click **Save** when finished.

## Application of Source

Sources that are set up here are visible in the system and used specifically when adding or modifying an account. The source field is a mandatory field. The options listed are based on active Sources.




### Permissions

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

| Permission ID | Permission Name |
|---|---|
| 23 | Setup \ Account |

## Related Articles

Create Account: Screen Field Descriptions
Add a New Account (Active)
Add a New Site & Move Between Sites