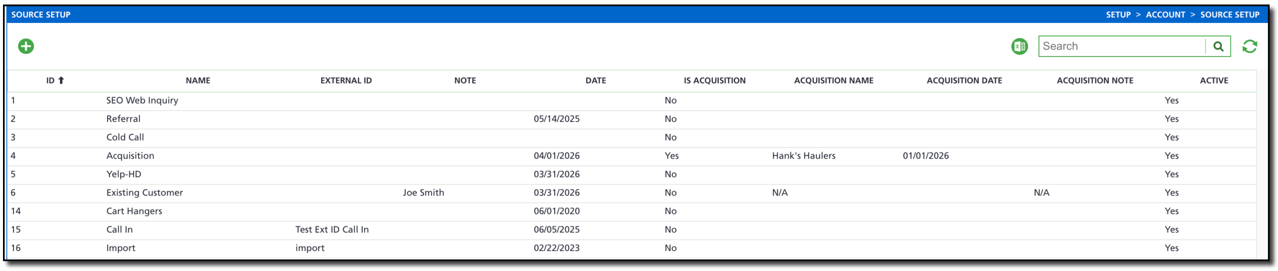
Source Setup

Last Modified on 06/30/2026 2:33 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.


SOURCE SETUP

SETUP > ACCOUNT > SOURCE SETUP

Search

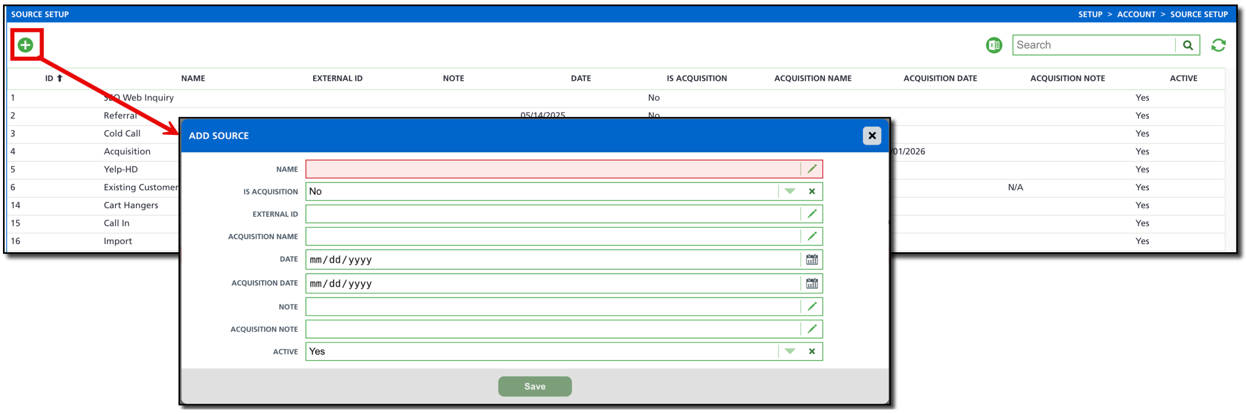
ID	NAME	EXTERNAL ID	NOTE	DATE	IS ACQUISITION	ACQUISITION NAME	ACQUISITION DATE	ACQUISITION NOTE	ACTIVE
1	SEO Web Inquiry				No				Yes
2	Referral			05/14/2025	No				Yes
3	Cold Call				No				Yes
4	Acquisition			04/01/2026	Yes	Hank's Haulers	01/01/2026		Yes
5	Yelp-HD			03/31/2026	No				Yes
6	Existing Customer		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.

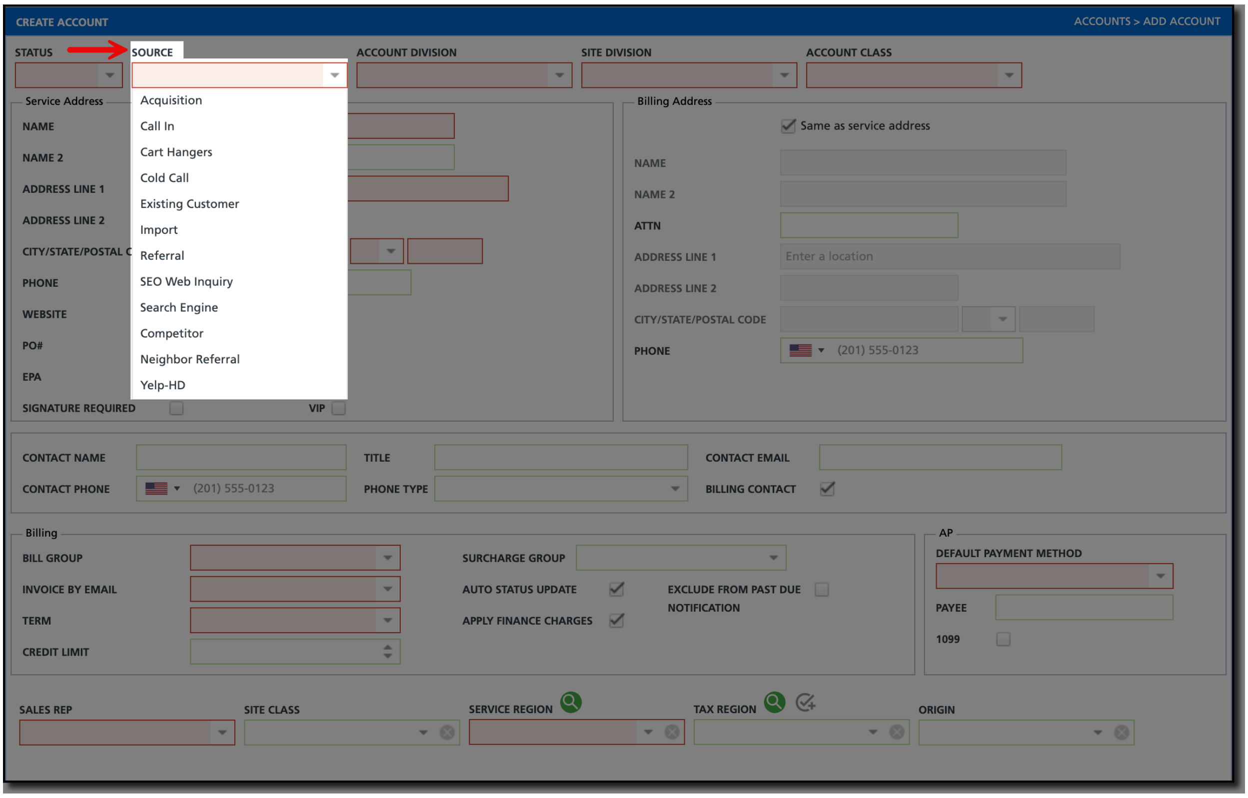
Edit/Deactivate a Source

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