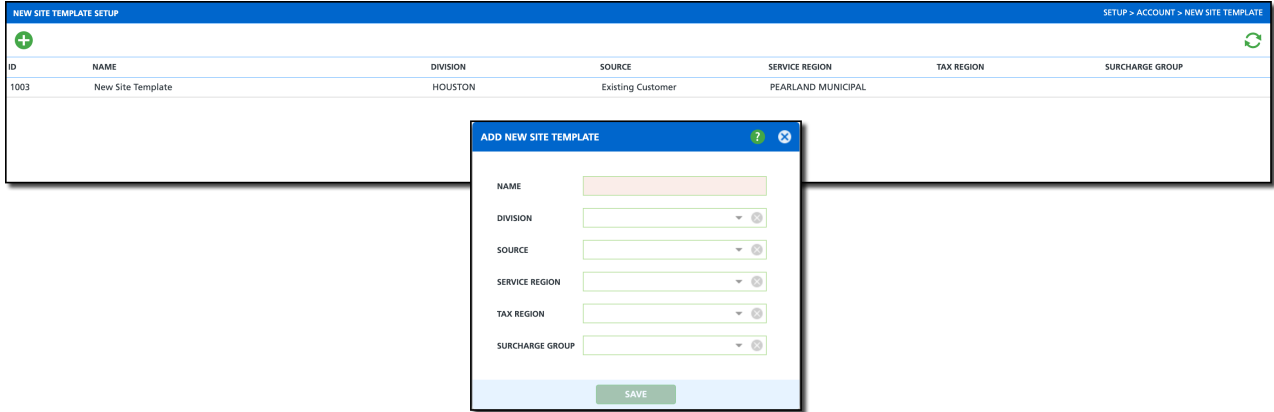


New Site Template Setup

Last Modified on 07/06/2023 2:24 pm EDT

Pathway: Setup > Accounts > New Site Template

New Site Template Setup is used to help streamline the Add Site process with preconfigured field selections. This feature reduces the amount of manual entry, ensuring that the site setup process is expedited and consistent with the template's predefined values.



Field Descriptions

When a template is selected to create a new site from, fields populated in the template will auto-populate for a site.

Field	Description
Name	The name of the template that will display for selection.
Division	The division a site using this template belongs to.
Source	Indicates the source of how a site originated.
Service Region	Indicates the service region for sites the template applies to.
Tax Region	Indicates the tax region for sites the template applies to.
Surcharge Group	Identifies the surcharge group for sites the template applies to.

Add New Site Template

After a template is created, it is available for selection upon adding a new site. Templates can not be deleted on the front-end once created.

1. Click the **green +** icon to open the Add New Site Template editor.
2. Complete the following required fields:
 - Enter a **Name** for the New Site Template.
3. Complete additional fields based on the template's requirements.
4. Click **Save** when finished.

Assign a Template to a Site

Site templates made using 'New Site Template' display for selection when adding a new site. Selecting a template option will automatically begin the 'Add Site' process with the preconfigured information.

The screenshot displays a software interface for site management. On the left is a navigation menu with options like 'Active Service', 'Appointment', and 'Site'. The main area shows details for two sites. The second site, '14910 WATERSIDE VIEW CT HOUSTON, TX 77044', is active and has a 'PENDING' status. Below this, there's a table of recurring services with columns for 'SERVICE ID', 'FREQUENCY', 'SCHEDULE', 'RATE', and 'START DATE'. At the bottom, a calendar view shows dates from May 28 to Jun 8. A red box highlights the 'Site' menu item, which has a sub-menu containing 'New Site Template'.

1-30	31-60	61-90	91-120	120+	TOTAL
0.00	0.00	0.00	0.00	0.00	-10.00

SERVICE ID	FREQUENCY	SCHEDULE	RATE	START DATE
C50F	2x per week	M,H	\$ 25.00 per month	07/01/2
7297	2x per week	M,H	\$ 0.00 per month	07/01/2

DATE	EVENTS
May 29	1, RS_SERVICE, 96GAL-MSW, MSW 1, RS_SERVICE, 18GAL-REC, REC
May 31	1, RS_SERVICE, 96GAL-MSW, MSW 1, RS_SERVICE, 18GAL-REC, REC
Jun 1	1, RS_SERVICE, 96GAL-MSW, MSW 1, RS_SERVICE, 18GAL-REC, REC
Jun 4	1, RS_SERVICE, 96GAL-MSW, MSW
Jun 5	
Jun 6	
Jun 7	1, RS_SERVICE, 96GAL-MSW, MSW
Jun 8	General