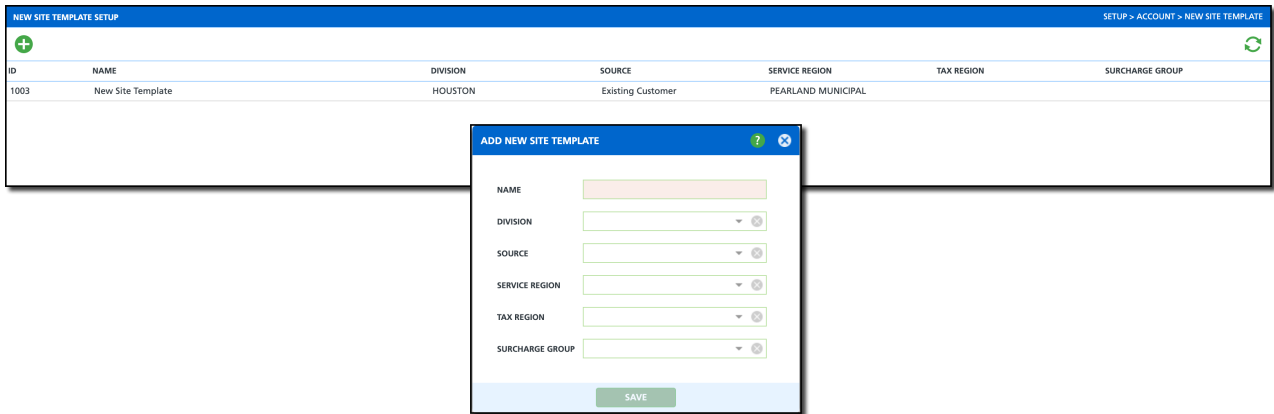


New Site Template Setup

Last Modified on 02/12/2025 2:22 pm PST

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.



Logic

If a template has an assigned division, its availability in Add Site is restricted based on the user's division access, as set in their user account. If no division is assigned, the template remains visible to all users.

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:
 - o 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. At the top, two site entries are shown: '28714 RAYFORD JAMES' and '28714001 RAYFORD JAMES'. The left sidebar contains a navigation menu with items like 'Active Service', 'Appointment', 'Attachment', etc. The main content area shows details for a site, including 'Active Service', 'Appointment', 'Attachment', 'Available Products', 'Cancellation Request', 'Contact', 'Default Rates', 'Lead', 'Next Invoice Message', 'Note', 'On Call Order', 'Post ACH Credit', 'Proposals and Contracts', 'Rebate Check Prepayment', 'Safety Profile', and 'Send Email'. Below this, there is a table with columns for 'SERVICE ID', 'FREQUENCY', 'SCHEDULE', 'RATE', and 'START DA'. The bottom section of the interface features a calendar view for the month of June 2022, with dates from May 28 to June 8. A red box highlights the 'Site' menu item in the left sidebar, and the 'New Site Template' option is visible in the dropdown menu.