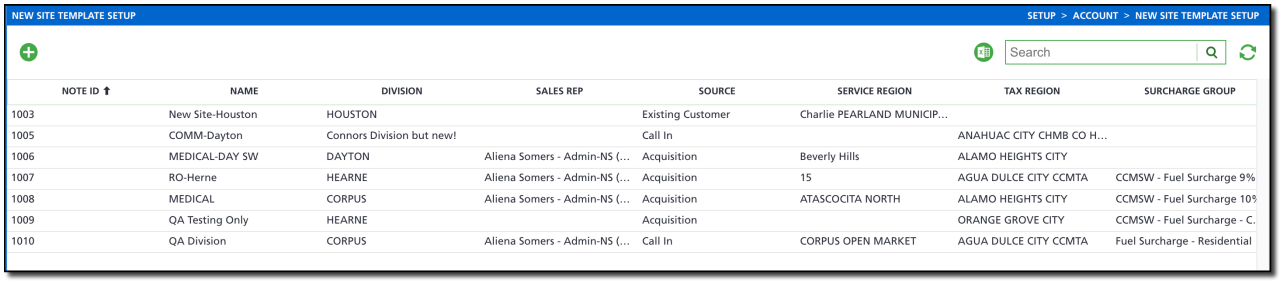
New Site Template Setup

Last Modified on 10/09/2026 12:59 pm PDT

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



NOTE ID	NAME	DIVISION	SALES REP	SOURCE	SERVICE REGION	TAX REGION	SURCHARGE GROUP
1003	New Site-Houston	HOUSTON		Existing Customer	Charlie PEARLAND MUNICIP...		
1005	COMM-Dayton	Connors Division but new!		Call In		ANAHUAC CITY CHMB CO H...	
1006	MEDICAL-DAY SW	DAYTON	Aliena Somers - Admin-NS (...	Acquisition	Beverly Hills	ALAMO HEIGHTS CITY	
1007	RO-Herne	HEARNE	Aliena Somers - Admin-NS (...	Acquisition	15	AGUA DULCE CITY CCMTA	CCMSW - Fuel Surcharge 9%
1008	MEDICAL	CORPUS	Aliena Somers - Admin-NS (...	Acquisition	ATASCOCITA NORTH	ALAMO HEIGHTS CITY	CCMSW - Fuel Surcharge 10%
1009	QA Testing Only	HEARNE		Acquisition		ORANGE GROVE CITY	CCMSW - Fuel Surcharge - C.
1010	QA Division	CORPUS	Aliena Somers - Admin-NS (...	Call In	CORPUS OPEN MARKET	AGUA DULCE CITY CCMTA	Fuel Surcharge - Residential

Field Descriptions

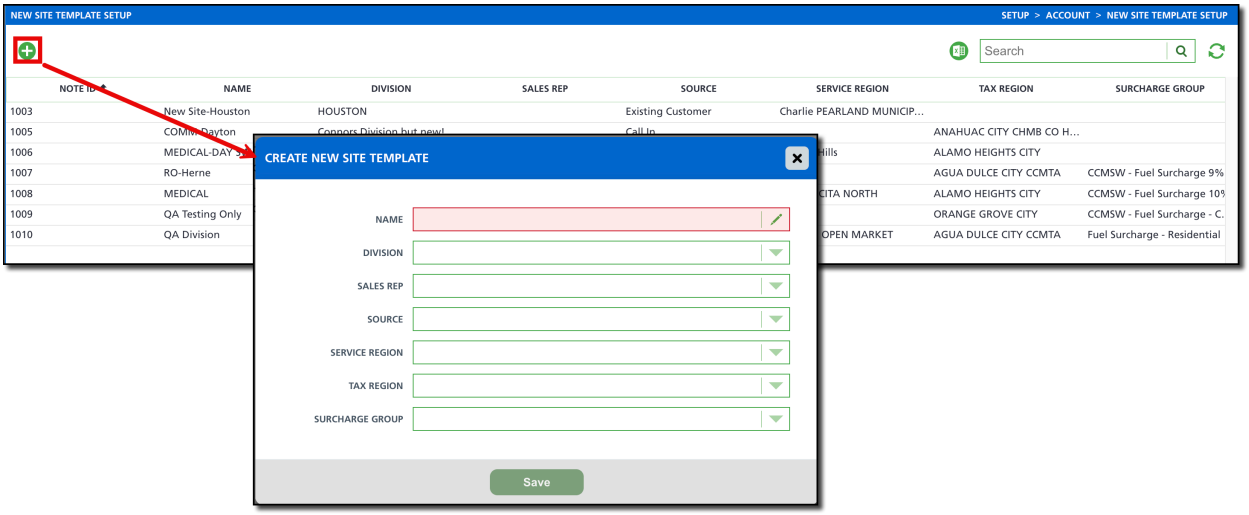
Field	Description
Name	A required name used to identify the template in dropdown menus (e.g., "Standard Commercial Site").
Division	Determines which division is responsible for the site's operations and what will be used wh this template is selected.
Source	The origin of the site. This tracks how the location was added to the system, such as via a customer call-in, an acquisition, or as an existing customer adding more sites.
Service Region	The primary geographical region for scheduling and routing for any site created using this template.
Tax Region	The specific tax jurisdiction to the site. This determines which sales tax rates and rules are applied to services invoiced at this location. Note: If the **Tax Region** is left blank or set incorrectly, it can stop an invoice from being generated or cause errors.
Surcharge Group	A predefined group of additional fees (such as fuel or environmental surcharges) assigned t the site.

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.

Add a New Site Template

To add a New Site Template use the following steps. After a Site Template is created, it is available for selection when adding a new site. Templates can not be deleted from the front-end once created.

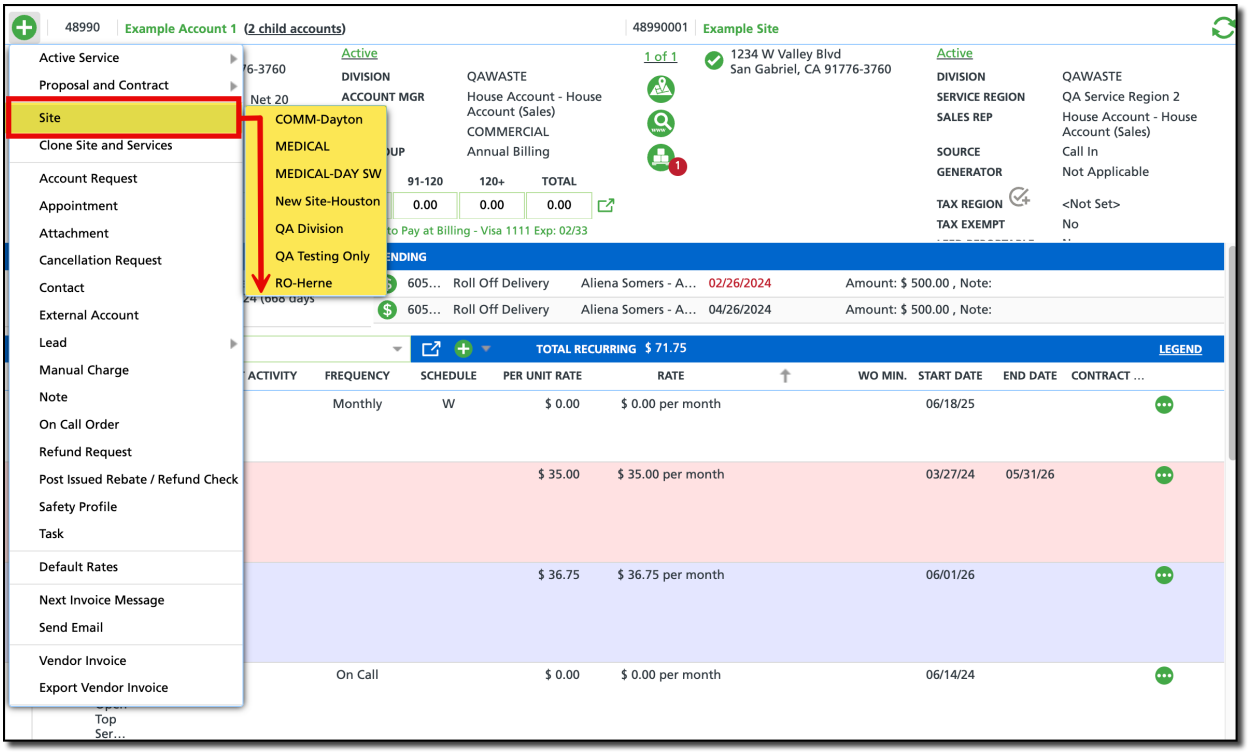


1. Click the **green +** icon to open the *Create New Site Template* editor.
2. Enter a descriptive and distinct **Name** for the New Site Template.
3. Select a **Division** if the template should be made available to only users assigned to that same division.
4. Complete additional fields based on the template's requirements.
5. Click **Save** when finished.

Note: To edit, double click on the New Site Template that needs to be modified from the Setup screen. Make changes and select Save.

Application of a New Site Template

New Site Templates are available to be used when creating a new site. Selecting one of the templates will automatically begin the 'Add Site' process with the preconfigured template information.



Related Articles

Add a New Site & Move Between Sites
New Account Template Setup