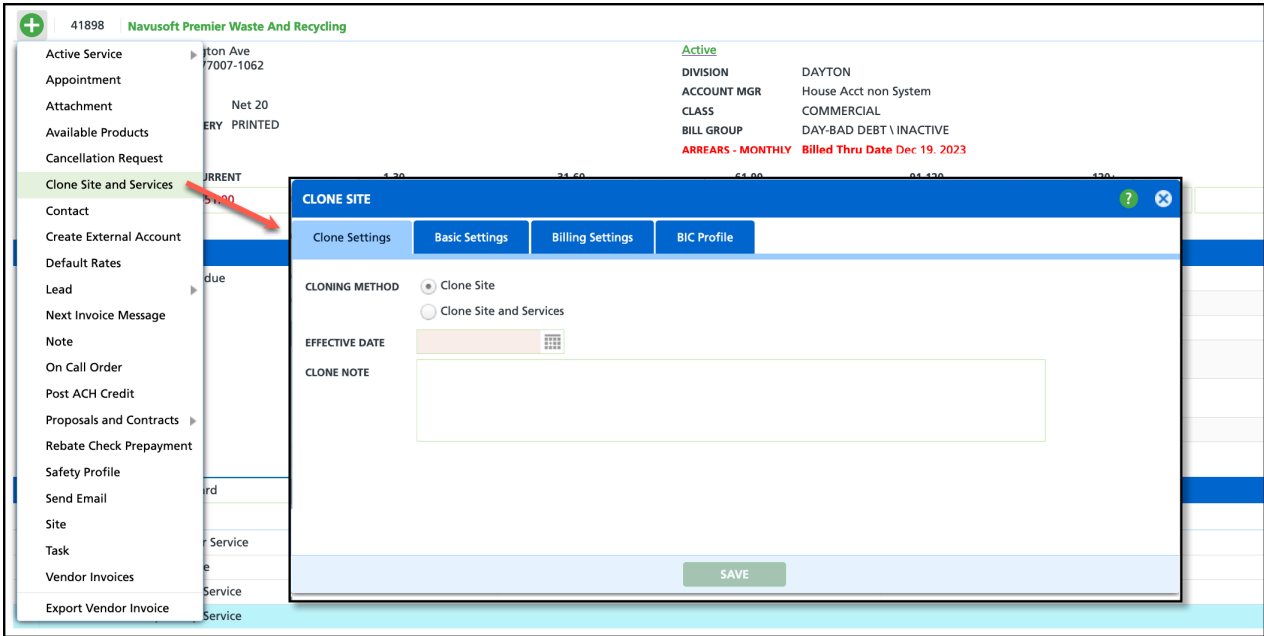


Clone Site and Services

Last Modified on 02/07/2024 10:59 am EST

Pathway: *Accounts > Customer Service Screen > + Menu > Clone Site and Services*

The Clone Sites and Services tool simplifies the process of adding new sites by cloning the configurations of an existing site, including its associated services if desired, with just a few clicks.



Permissions

The following permissions are required to access and use the Clone Site and Services feature:

Permission ID	Permission Name
5	View Account
6	View Site
453	Clone Site and Services

Clone Site: Tabs

Clone Settings

The Clone Settings tab determines the elements to be cloned, and if services are included, initiates the creation of a delivery work order.

CLONE SITE
? X

Clone Settings

Basic Settings

Billing Settings

BIC Profile

CLONING METHOD Clone Site
 Clone Site and Services

EFFECTIVE DATE

REASON CODE

CLONE NOTE

START SERVICES

CREATE DELIVERY WO	ROUTE	DATE	WORK ORDER NOTES
<input checked="" type="checkbox"/> RO Delivery	HOU 304	02/09/24 Friday	
<input checked="" type="checkbox"/> FL Delivery	LA 101	02/09/24 Friday	
4 Yard Recycle Service - 1x per week			

Field Descriptions

Field	Description
Cloning Method	Determines if only a site, or a site and its services will be cloned. If Site and Services are selected, a Reason Code field will display.
Effective Date	Refers to the date the site became available for servicing and is the default date the delivery work order(s) will use.
Reason Code	Identifies the reason for the service(s)
Clone Note	Option to add a note regarding the clone that will display in the Note section of Site Status History.
Start Services	
Create Delivery WO	Hover the mouse over the delivery service to display the service code in a tool tip. Select only the services you would like to create a delivery work order for.
Route	Click within the column to select a route to add the delivery work order to.
Date	Defaults to the Effective Date that was entered. If necessary, click within the column to change the date.
Work Order Notes	Option to add notes that will display on the work order.
Save	Save is only available after all required fields in the Clone Settings and Basic Settings tabs are complete.

Basic Settings

The Basic Settings tab captures the information specific to the new site such as address, contact and regional information.

The screenshot shows a web application window titled "CLONE SITE". It has four tabs: "Clone Settings", "Basic Settings" (highlighted with a red box), "Billing Settings", and "BIC Profile". The "Basic Settings" tab contains the following fields:

- NAME:** Two text input fields.
- ADDRESS LINE 1:** A text input field with a placeholder "Enter a location".
- ADDRESS LINE 2:** A text input field.
- CITY/STATE/POSTAL CODE:** A text input field with a dropdown arrow.
- PHONE 1 & 2:** Two phone number input fields, each with a country code dropdown and a format "(999) 999-9999".
- OLD ID & PO#:** Two text input fields.
- SIGNATURE REQUIRED & LEED REPORTABLE:** Two checkboxes.
- NOTE:** A large text area with the placeholder "Site Notes".
- WARNING ON OPEN & ACCESS INFORMATION:** Two text input fields.
- DIVISION:** A dropdown menu with "CORPUS" selected.
- SERVICE REGION:** A dropdown menu.
- TAX REGION:** A dropdown menu with a search icon.
- ORIGIN:** A dropdown menu.
- SOURCE:** A dropdown menu with "Cold Call" selected.
- SALES REP:** A dropdown menu with "House Acct non System" selected.
- STATUS:** A dropdown menu with "Active" selected.
- SITE CLASS:** A dropdown menu.
- GENERATOR:** A dropdown menu with "Not Applicable" selected.
- EPA, STATE ID, & ADDITIONAL SERVICE MINUTES:** Three text input fields.

A "SAVE" button is located at the bottom center of the form.

Field Descriptions

At a minimum, complete all required fields highlighted in red.

Field	Description
Contact Information (Name, Address, Phone)	The contact information for the account.
Signature Required	If selected, requires the driver to get a signature from the service location.
LEED Reportable	Indicates if the site is eligible for inclusion in Leadership in Energy and Environmental Design (LEED) certification reports.
Note	Note that is specific to the site and displays in the Site Details section of the Customer Service screen.
Warning On Open	Displays a warning note each time a user views the customer service screen.
Access Information	Displays on the service record for the driver and in the Site Details section of the Customer Service screen.
Division	Cloned from the originating site. If changed, a message is displayed warning the user to check additional set up pieces.
Service Region	Refers to the geographic location of the customer usually by city, town or county.

Tax Region	Identifies the tax region to which the site belongs. If no tax region is selected, the site is considered tax exempt.
Origin	Refers to how the site originated.
Source	Refers to the method of acquiring the site, whether through referral, acquisition, or other means. This information is valuable for future marketing campaigns.
Sales Rep	Indicates the sales representative responsible for the account.
Status	Refers to the current status of the site. By default, this is set to 'Active.'
Site Class	The classification for the site.
Generator	Hazardous Waste setting that is utilized to assist in predicting the quantity of waste generated.
EPA	Environmental Protection Agency (EPA). Enter the State ID or other number found in the contract.
State ID	ID issued by the state.
Additional Service Minutes	Route Optimization setting that factors in extra minutes when calculating the service duration for the site.

Billing Settings

The Billing Settings tab records the billing setup for the site, with specific fields pre-populated from the original site for user convenience.

The screenshot shows a web application window titled "CLONE SITE" with a blue header. Below the header are four tabs: "Clone Settings", "Basic Settings", "Billing Settings" (which is highlighted with a red box), and "BIC Profile". The "Billing Settings" tab contains the following fields:

- TAX EXEMPT?: A checkbox that is currently unchecked.
- TAX EXEMPT REASON: An empty text input field.
- SURCHARGE GROUP: A dropdown menu with "Fuel Surcharge - Commercial" selected.
- INVOICE BY EMAIL: A dropdown menu with "Account Settings" selected.
- SITE BILLING CONTACT1: An empty dropdown menu.
- SITE BILLING CONTACT2: An empty dropdown menu.
- PAYEE NAME: An empty text input field.
- BILL GROUP: An empty dropdown menu.
- BILL TO SELECTION: A dropdown menu with "Invoice mailed to site address" selected.

A green "SAVE" button is located at the bottom center of the form area.

Field Descriptions

Field	Description
Tax Exempt	If the site <u>is</u> tax exempt and no tax region was selected when the account was created, select the Tax Exempt check box.
Tax Exempt Reason	If the Tax Exempt box is checked, provide supporting information explaining the reason for the site's tax exemption.
Surcharge Group	Select a Surcharge Group if the location is subject to a surcharge.
Invoice By Email	The selection applied to the original site populates this field.
Site Billing Contact1	Identifies the initial contact person for billing-related matters at the site. Account contacts are available for selection, and after the cloned site is created, site-specific contacts can be assigned later.
Site Billing Contact2	Identifies the second contact person for billing-related matters at the site. Account contacts are shown for selection, and after the cloned site is created, site-specific contacts can be assigned later.
Payee Name	Refers to the name of the person or entity to whom a payment is made.
Bill Group	Identifies the bill group the site will be on for all billing cycles.
Bill to Selection	Provides three mailer options for where to mail invoices to. <ul style="list-style-type: none"> • Invoice Mailed to Site Address • Invoice Mailed to Address Below (address fields are displayed if selected) • Invoice Mailed to Account Address

BIC Profile

The BIC Profile tab pertains to commercial establishments in New York mandated by law to arrange for the collection of their putrescible waste and recyclables through a hauler licensed by the Business Integrity Commission (BIC).

The screenshot shows a web application window titled "CLONE SITE". At the top, there are four tabs: "Clone Settings", "Basic Settings", "Billing Settings", and "BIC Profile". The "BIC Profile" tab is selected and highlighted with a red box. Below the tabs, the form contains the following fields:

- WASTE STREAM SURVEY:** A dropdown menu with "No" selected.
- BUSINESS TYPE:** A dropdown menu with "Not Selected" selected.
- CONTRACT TYPE:** An empty dropdown menu.
- OTHER FINANCIAL REQUIREMENTS:** An empty dropdown menu.
- COMMENTS:** A large empty text area.

At the bottom center of the form, there is a green "SAVE" button.

Field Descriptions

Waste Stream Survey	Indicates if a waste stream survey was completed for the site.
Business Type	Specifies the business categorization used to identify the type of waste generated by the establishment.
Contract Type	Indicates if the contract between the customer and hauler was written or oral.
Other Financial Requirements	Indicates if the site has other financial requirements.
Comments	Option to provide addition comments regarding the site's BIC profile.