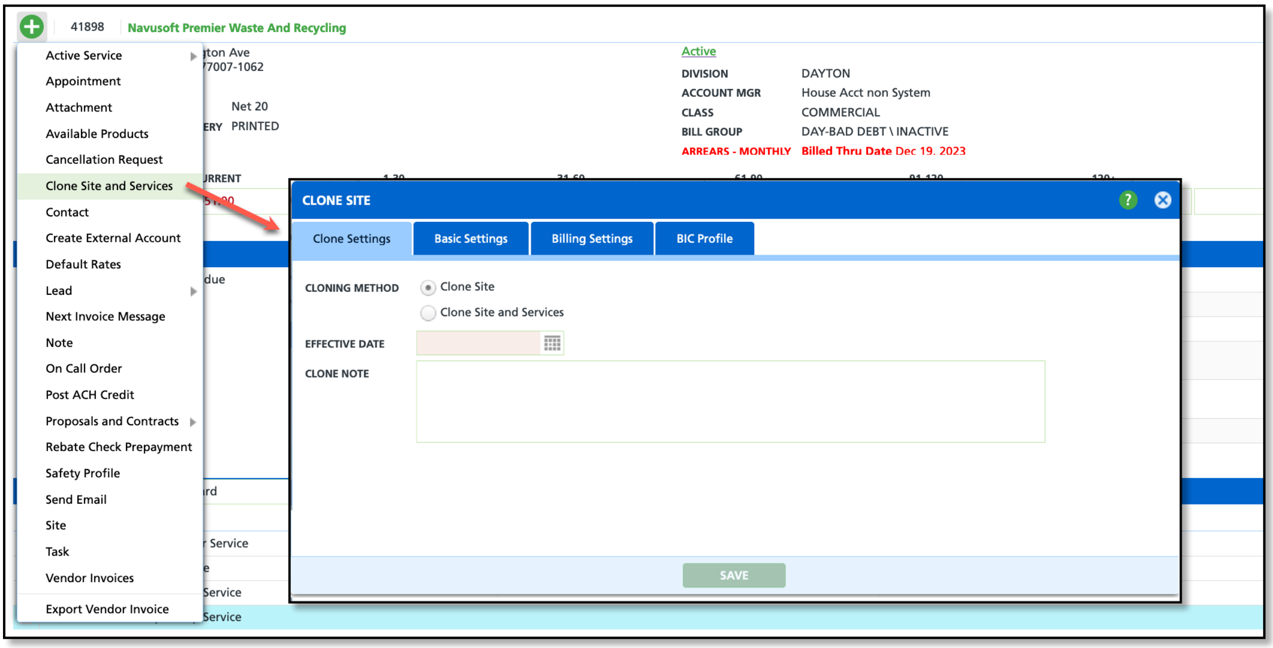
# Clone Site and Services

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

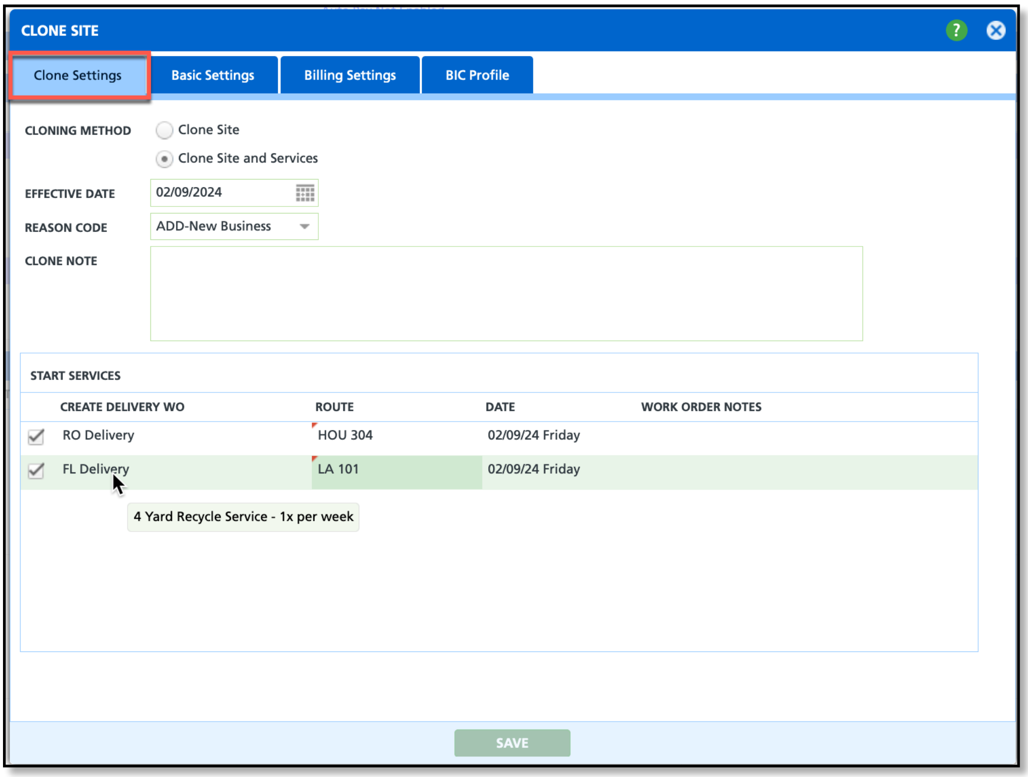
The following permissions are required to access and use the Clone Site and Services feature:

| 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.

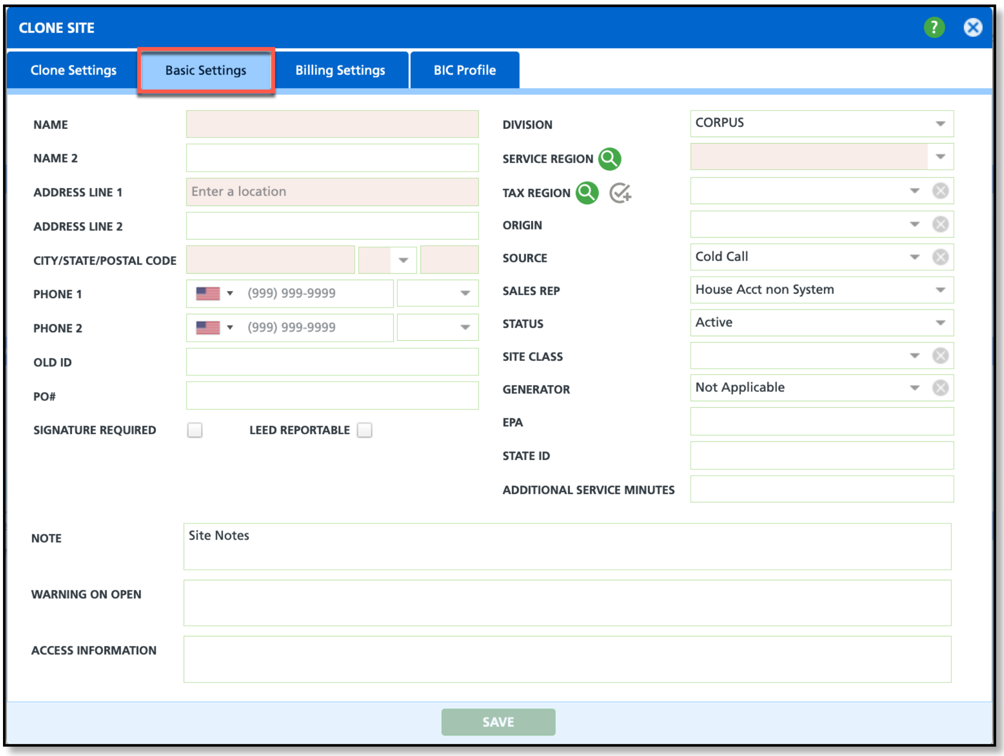



## Field Descriptions

| 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.




## Field Descriptions

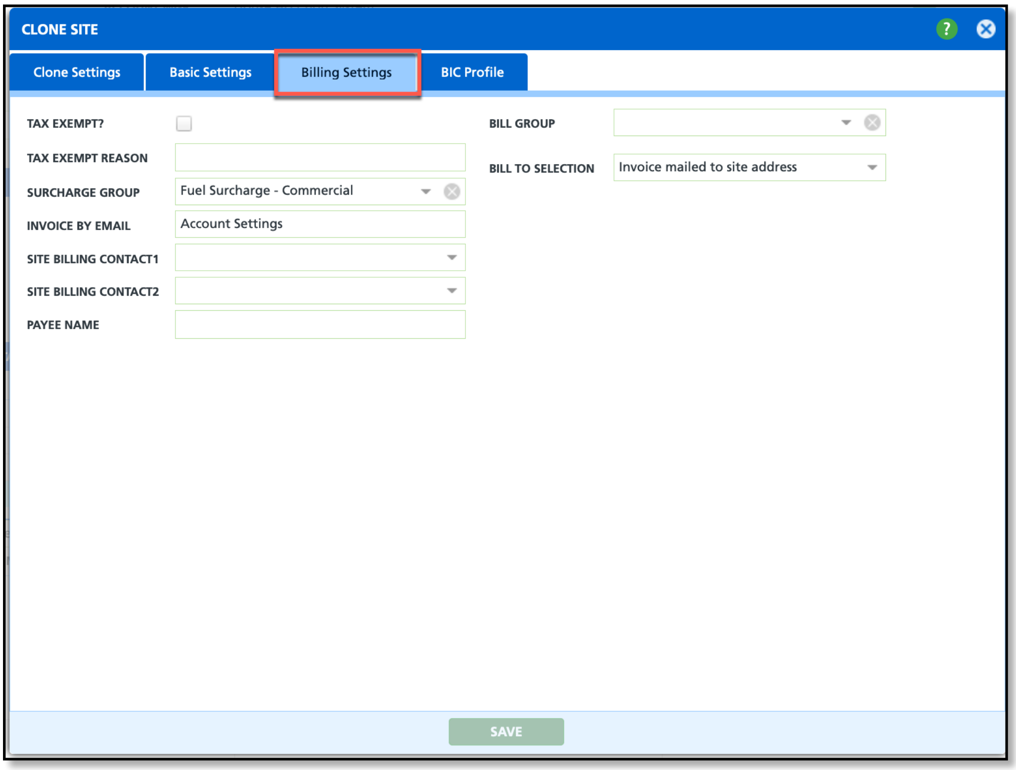
At a minimum, complete all required fields highlighted in red.

| 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.

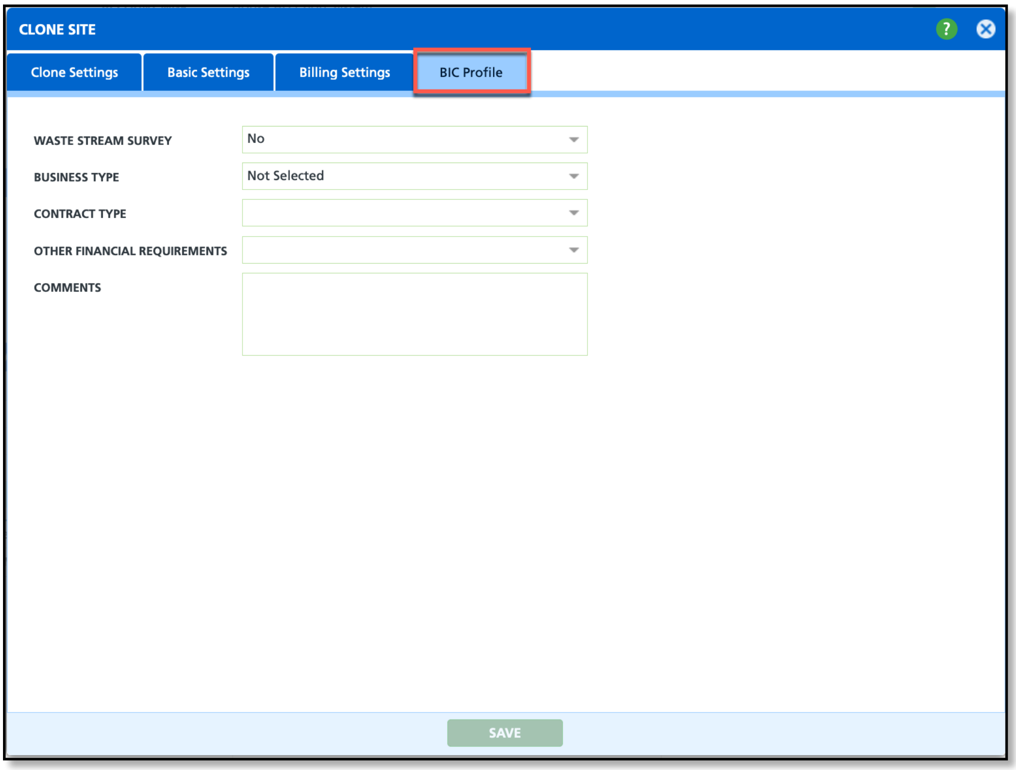



## Field Descriptions

| Field | Description |
|---|---|
| **Tax Exempt** | If the site **is** 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.<br>• Invoice Mailed to Site Address<br>• Invoice Mailed to Address Below (address fields are displayed if selected)<br>• 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).




## 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. |