Add Additional Sites

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When creating a new customer, one Site is created in the process. If the new customer has more than one site, follow the process below.

Additional Sites may be added to a Customer at any time.
1. From the Customer Explorer, highlight the Sites menu option. Right-click and select the New Site option.
2. The New Site form will be displayed. The Name, Address and Phone information auto-filled into the form will be that from the first site created for the customer. Modify the information for the new site being created. If there is more than one Bill To record for this customer and you want to change the default Bill To for this new Site, click on the button to the left of the Bill To information in the header area to open the list of available Bill To's from which to choose.

When finished, click on the Save button located at the lower right of the New Site form.
Once the New Site has been saved, it will be added to the customer tree within the Customer Explorer.