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## The Importance of Location Name at the Client Level


When adding or updating Client locations in Nexsure, it is important to enter the Location name. This field is used on other screens in Nexsure to identify the location.

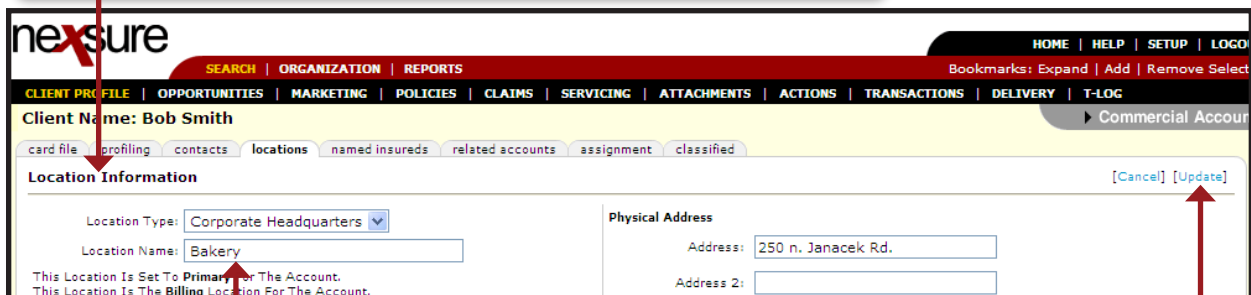
### Updating the Location Name at the Client level

To update the Location name at the Client level, select the client and perform the following:

1. Locate the appropriate client through **SEARCH** and click on the **locations** tab.



2. Click the **Details**  icon to view **Location Information**.



3. Enter the **Location Name**.

4. Click the **[Update]** link to update the **Location Information**.

**Note:** (For more information, see **Locations** in Chapter 3 of the Nexsure® CRM Training Manual)

### Where Location Name Appears on Other Screens in Nexsure

Below are examples of where location name appears on other screens in Nexsure:

The **Location Name** appears on the **SEARCH** screen to help identify the location.

The screenshot shows the Nexsure SEARCH interface. At the top, there's a navigation bar with 'SEARCH | ORGANIZATION | REPORTS'. Below it, a search criteria section on the left includes dropdowns for Entity (Client), Search Type (Contains), Branch (All Branches), Client Stage (All), Client Type (All), Code Class (All), Code Designation (All), Status (All), and a Client input field. The main area displays 'HISTORY RESULTS - CLIENT' with 50 records found. A table lists records with columns: Details, Name, Client Type, Stage, Location Name, City, St./Prov., Zip/Postal, and Remove. The records shown are:

Details	Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove
	Bob's Bakery	Commercial	Client	Bakery	Brea	CA	92823	
	Winston Auto Parts	Commercial	Client	Retail store	Brea	CA	92821	
	Masons Grill	Commercial	Client		Brea	CA	92821	
	Henderson Hardware & Supply Company & Electronics	Commercial	Client	Winston location	Brea	CA	92821	
	Busy Bee Crafts	Commercial	Client	Retail	Brea	CA	92821	

The **Bill To:** address is changed on either the Policy Info screen or the invoice. To change, click the **[Change Bill To]** link, choose the **Bill To:** option (such as **Client**), select the **Bill To:** from the selection box and click the **Next** button. The **Location:** drop-down box contains any location names entered at the **Client > locations** level. If no location name was entered, the **Location:** drop-down box will be empty.

The screenshots illustrate the 'Change Bill To' process. The first screenshot shows the 'Invoice Bill To' screen with 'Bill To: Bob's Bakery' and 'Entity Type: Client'. A '(Change Bill To)' link is visible. The second screenshot is a dialog box titled 'Who do you want to bill?' with 'Bill To Level: Invoice'. It lists options: Current Bill To (Bob's Bakery, Client), Client, Related Account, Finance Company, and Additional Interest. A search box contains 'Bob's Bakery'. The third screenshot shows the 'Policy Info' screen with 'Entity Type: Client' and 'Bill To Level: Invoice'. It displays 'Name: Bob's Bakery', 'Location: Bakery', and 'Contact: Bob Bradey'. Arrows indicate the flow from the 'Change Bill To' link to the dialog box, then to the 'Policy Info' screen, and finally to the 'Location' dropdown.



When adding **disbursements** to a client, the **Location Name:** can be used to help identify the client.

The screenshot shows the Nexsure web application interface. On the left, the 'Organization Profile' page is visible with the 'disbursements' tab selected. A red arrow points from the 'disbursements' tab to the 'Disbursement' pop-up window. The pop-up window has a 'Select Entry:' section with a dropdown for 'Entity Type' set to 'Client'. Below this, there are input fields for 'Entity Name' (containing 'Bob') and 'Location Name' (containing 'Bakery'). There is also an 'Address' field and a 'Search' button. A red arrow points from the 'Location Name' field to the text box above. The background shows the 'Organization Profile' page with the 'disbursements' tab selected.

To access the **Disbursement** pop-up window, click the **[Add New Disbursement]** link on the **disbursements** tab screen.

When adding **receive payments** for a client, the **Location Name:** can be used to help locate the client.

The screenshot shows the Nexsure web application interface. On the left, the 'Organization Profile' page is visible with the 'receive payments' tab selected. A red arrow points from the 'receive payments' tab to the 'Select Entity' pop-up window. The pop-up window has a 'Select Entity:' section with a dropdown for 'Entity Type' set to 'Client'. Below this, there are input fields for 'Entity Name' (containing 'Bob') and 'Location Name' (containing 'Bakery'). There is also an 'Address' field and a 'Search' button. A red arrow points from the 'Location Name' field to the text box above. The background shows the 'Organization Profile' page with the 'receive payments' tab selected.

To access the **Select Entity** pop-up window, click the **[Add New]** link on the **receive payments** tab screen.