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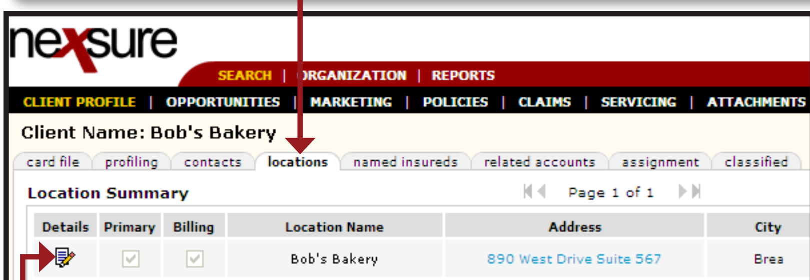
The Importance of Location Name at the Client Level

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.

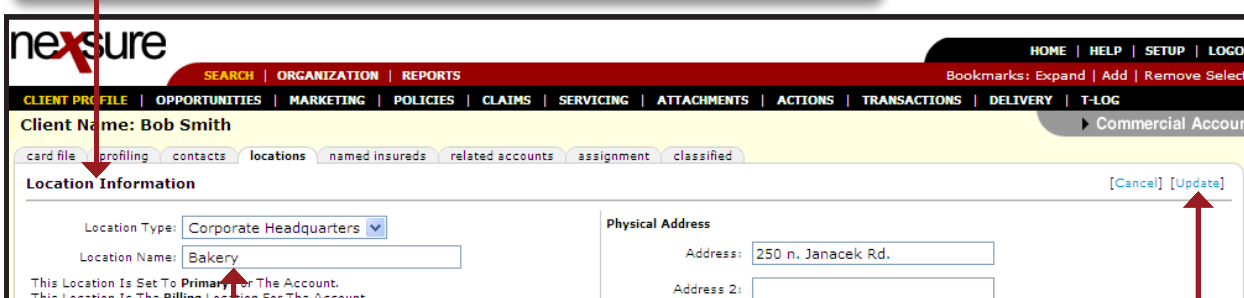
Updating the Location Name at the Client level

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:**.

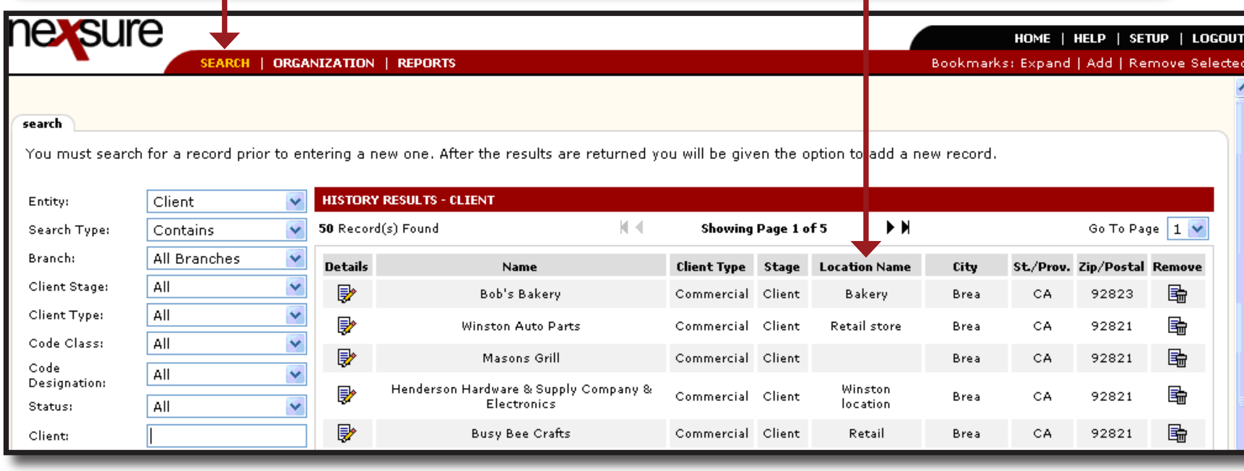
4. Click the **[Update]** link to update the **Location Information**.

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

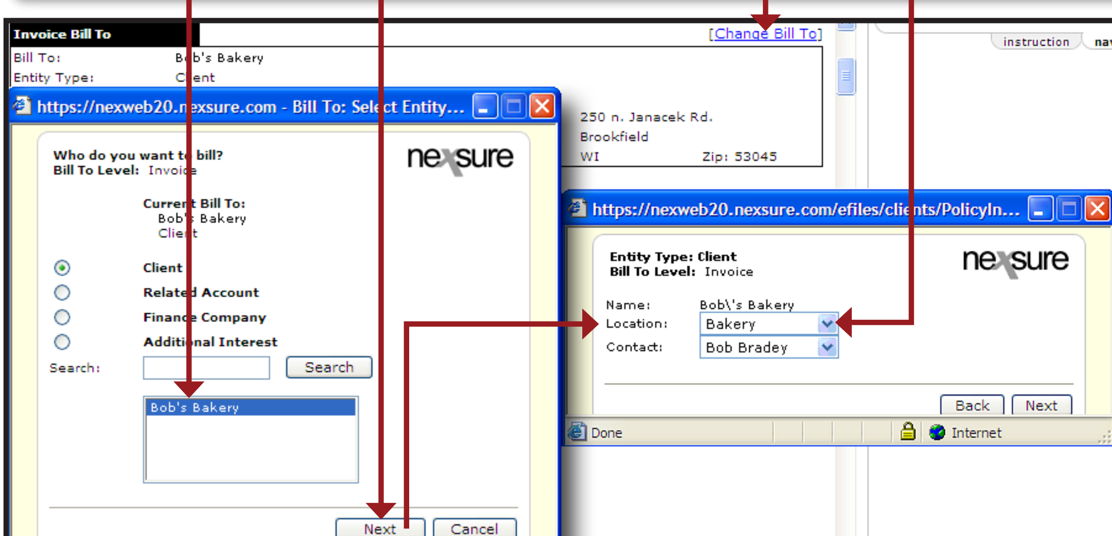
Where Location Name Appears on Other Screens in Nexsure

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

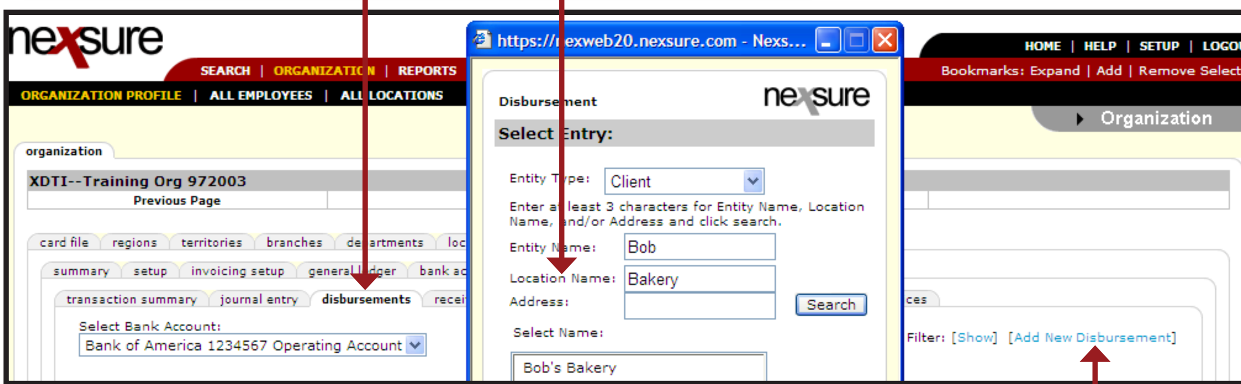
The **Location Name** appears on the **SEARCH** screen to help identify the location.



The **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.

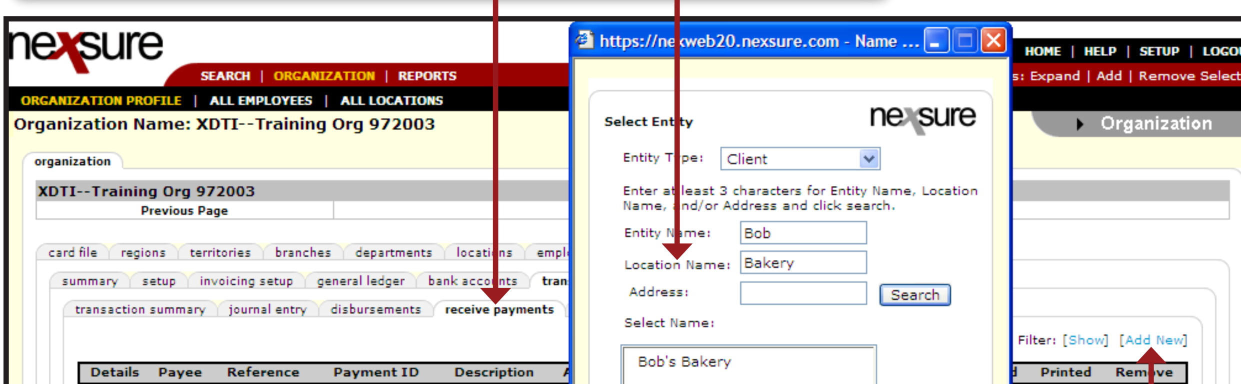


When adding **disbursements** to a client, the **Location Name:** can be used to help identify the client.



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.



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