

## **IN THIS ISSUE**

✗ Identify Client Billing Address

## **Identify Client Billing Address**

When adding a new client, make sure to identify the billing address on the **location** tab. The billing address is the default address used when invoices are added. Perform the following to identify the billing address:

<ol> <li>Once the detail has been comp click the Save button to create</li> </ol>	leted for the new record the newly added record.	
SEARCH   ORGANIZATION   REPORTS   CAM	PAIGNS   ELINKS	HOME   HELP   SETUP   LOCOUT Bookmarks: Expand   Add   Remove Selected 💞
card file profiling contacts locations named insureds related ac * indicates required field	counts assignments classifieds campaigns Go Directly to the Profile Page V Save Clear	
Client Information	Primary Contact	
Client Type: Commercial V	Apply Contact: O Use Existing  Add New	
Client Name: Jackson Entriprises, Inc.		
Website: www.xdti.com	First Name	
Drimany Account Addrore	Last Name: Jackson *	
Location Type: Office *	Suffix:	
Location Name: 445 West Street	Title: Owner	
Address: 445 West Street	Contact Role: Inspection	
	E-Mail: maryo@xdti.com	
City: Birmingham	Phone Number(s) Format(#########)	
State: Alabama	Type Number Ext Description	
Zip: 35201	Personal Fax 2056691120	
Country: United States	Home Phone	
Inti Address Info:		
Phone: 2056691122		
Fax: 2056691120		
Is the above the US Mail address for this location? $\odot$ Ves $\bigcirc$ No		
Primary Assignment	Retail Agent None	
Branch: Ace Insurance Branch Department: Commercial Lines	*	
Unit: Unassigned		
Responsibility: Producer		
Names: Oberleitner, Mary	✓	

**X**Dimensional Technologies

January, 2010

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SEARCH   ORGANIZATION   REPORTS   CAMPAIGNS   ELINKS	5	Во	okmarks: Expand   Add   Remove Selecte
IENT PRO TILE   OPPORTUNITIES   MARKETING   POLICIES   CLAIMS   SERVICING	ATTACHMENTS   ACTIONS   TRANSACTIONS   DELIVERY	T-LOG	
pect Name: Jackson Entriprises, Inc.			Commercial Acc
d file finding contests locations named insureds related accounts assignm	nents classifieds campaigns		
ocation Summary			Filters: [ Show ] [Add
	Showing page 1 of 1 Page 1		
2tails Primary Billing Location Name Address 445 West Street 445 West Street	City St./Prov. Zip/Postal P Birmingham AL 35201 (20	Phone Number 05) 669-1122	Fax Number Rem (205) 669-1120
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To make the billing address the same a added, click the <b>Details</b>	Address [45 West Street Address 2: City Classified	answer.	Commercial Ac

**FACT**: Location Types and Location Names must be completed since they are used to identify and select a different location address for invoices.

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