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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:

1. Once the detail has been completed for the new record click the **Save** button to create the newly added record.

The screenshot shows the Nexsure web application interface. At the top, there is a navigation bar with links for SEARCH, ORGANIZATION, REPORTS, CAMPAIGNS, and ELINKS. Below this is a breadcrumb trail: card file > profiling > contacts > locations > named insureds > related accounts > assignments > classifieds > campaigns. The main content area is divided into several sections:

- Client Information:** Client Type: Commercial; Client Name: Jackson Enterprises, Inc.; Website: www.xdti.com.
- Primary Account Address:** Location Type: Office; Location Name: 445 West Street; Address: 445 West Street; City: Birmingham; State: Alabama; Zip: 35201; Country: United States; Phone: 2056691122; Fax: 2056691120.
- Primary Contact:** Apply Contact: Use Existing (selected), Add New; Prefix: Ms.; First Name: Jane; Last Name: Jackson; Title: Owner; Contact Role: Inspection; E-Mail: maryo@xdti.com.
- Phone Number(s):** A table with columns for Type, Number, Ext, and Description.

Type	Number	Ext	Description
Business Phone	2056691122		
Personal Fax	2056691120		
Home Phone			
- Primary Assignment:** Retail Agent: None; Branch: Ace Insurance Branch; Department: Commercial Lines; Unit: Unassigned; Responsibility: Producer; Names: Oberleitner, Mary.

At the top right of the form area, there are buttons for 'Go Directly to the Profile Page', 'Save', and 'Clear'. A red box highlights the 'Save' button, and a red arrow points from the instruction text to it.

2. Click the **locations** tab to display the **Location Summary** screen.

Suspect Name: Jackson Entrprises, Inc. Commercial Account

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Location Summary

Showing page 1 of 1 Page 1 Filters: [Show] [Add New]

Details	Primary	Billing	Location Name	Address	City	St./Prov.	Zip/Postal	Phone Number	Fax Number	Remove
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	445 West Street	445 West Street	Birmingham	AL	35201	(205) 669-1122	(205) 669-1120	

3. To make the billing address the same as the location address just added, click the **Details** icon to display the details of the record.

4. Select the **Yes** option for the **Is this the Billing Location for this account?** answer.

Suspect Name: Jackson Entrprises, Inc. Commercial Account

card file | profiling | contacts | **locations** | named insureds | related accounts | assignments | classifieds | campaigns

Location Information (* indicates required field) [Update] [Cancel]

Location Type: Office *
 Location Name: 445 West Street
 This Location Is Set To **Primary** For The Account.
 Is this the Billing Location for this account? Yes No

Physical Address
 Address: 445 West Street *
 Address 2:
 City: Birmingham ... *

5. Click the **[Update]** link.

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