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* The Importance of Location Name

The Importance of Location Name

When adding new accounts or new locations to client records in Nexsure, the **Location Name** box is most often not populated. Perform the following steps to locate and populate the **Location Name** box:

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X Dimensional[®]

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3. The Location Name box is located under the Location Type list on the Location Information screen. After updating any boxes on this screen, save the record by clicking the [Update] link.

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- 4. Even though the **Location Name** box is not a required field, it is important because it is used as follows:
 - a. When searching for clients on the **SEARCH** screen, the **Location Name** displayed is the primary location for the client record. The **Location Name** can be anything that specifically identifies the location (Here are some examples to identify the specific location: Westgate Storage; Westgate Office; CA vacation house, etc). If the **Location Name** box is not populated then it will be blank on the search screen.

search		_							-			
All Branches												
									[Add New Record]			
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b. On the Policy Info screen and on invoices, when selections are made from the [Change Bill To] link
 > Client Search > Next, it is the Location Name that is used when selecting the billing address. So, if no location name is entered, the Location list will not have any selections available.

Entity Type: (Client	ne sure
Bill To Level:	Invoice	
Name: Location:	ABC Contracting	
Contact:	-Please Select-	
		Back Next

Note: Make sure to check for location names when servicing accounts and add if missing.

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