nexsure®

Tips & Facts

Volume 6, Issue 3

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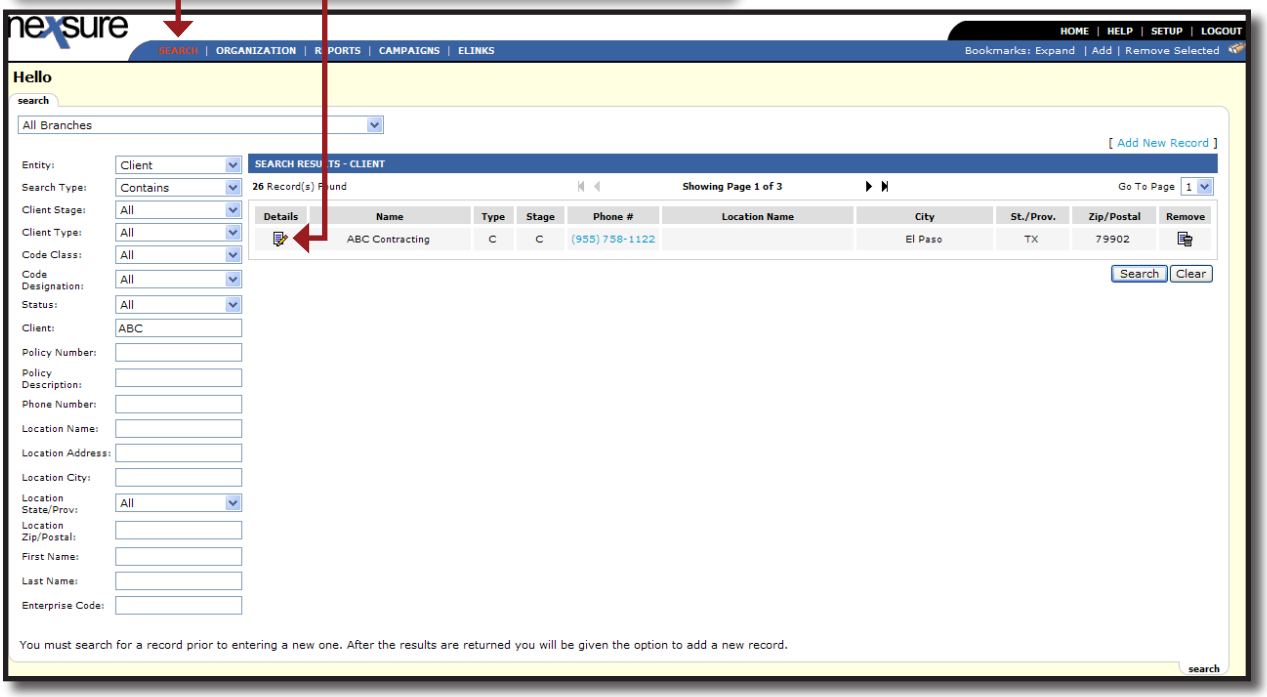
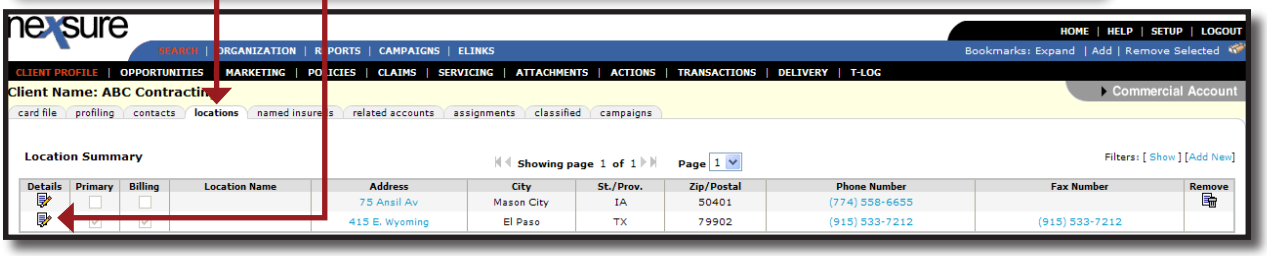
The Importance of Location Name

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:

1. Locate the client from **SEARCH** and click the **Details** icon.



2. Click the **locations** tab and click the **Details** icon of the location that is not currently named.



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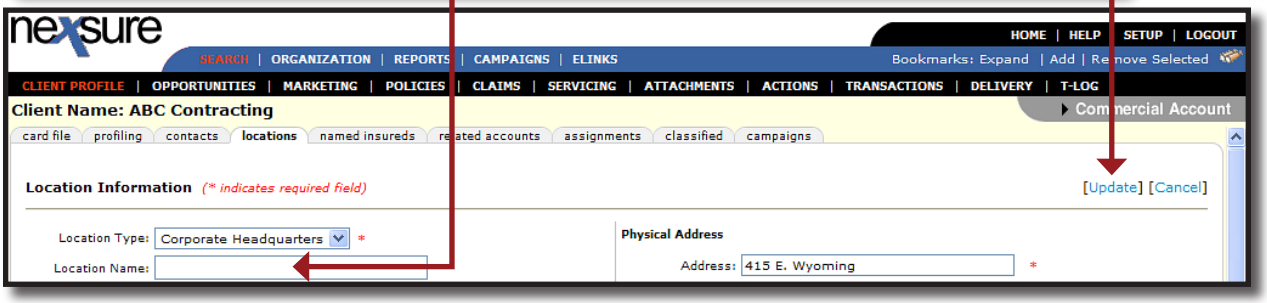
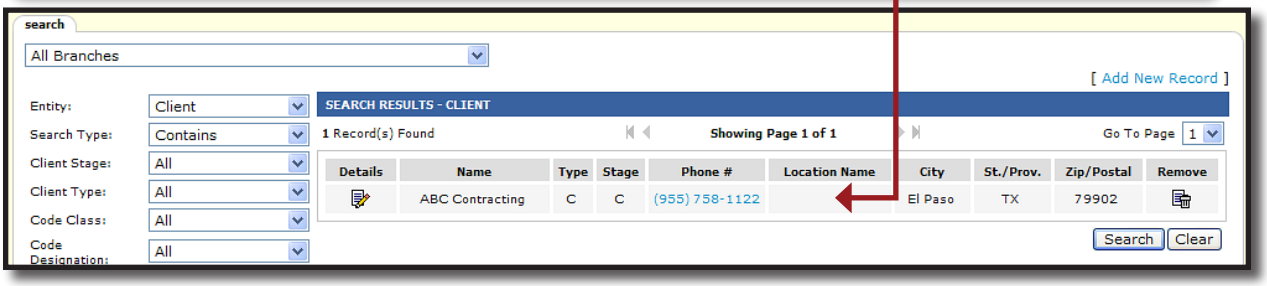
3. The **Location Name** box is located under the **Location Type** list on the **Location Information** screen. After updating any boxes on this screen, save the record by clicking the **[Update]** link.

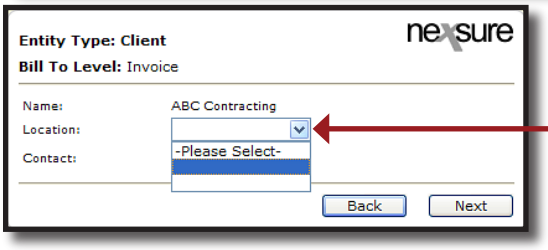


4. Even though the **Location Name** box is not a required field, it is important because it is used as follows:

   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.



   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.



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

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