

Customer Profile: Manage Service Locations

View Service Locations

1. Go to the **Location** tab in the customer's profile.
2. You'll see a list of all the customer's **service locations** here.
 - **Note:** Billing addresses are not shown in this list. If you want the billing address to show, you must **add it as a service location**.

The list includes:

- Location name
- Contact person's name
- Service address
- Contact person's phone number
- Email address

Sort and Filter the List

- **Sort** by clicking any column header (Location Name, Contact Name, or Address).
- **Filter** using the Filter Bar to quickly find a location.
- Click **Clear Filter** to reset the search.

Adjust Page View

- You can choose how many locations to see per page: **5, 10, 20, or 50**.
- Use **Previous** and **Next** to move between pages.



Add a Service Location

Some clients have more than one service location. All of them will share the **same billing address** under one profile.

To Add a New Location:

1. Go to the **Location** tab and click **Actions/+ Create Service Location**.
2. Fill in the service location details. Fields with * are required.

Required Fields:

- **Location Name** – The name of the building or site
 - **First & Last Name** – Contact person at the location
 - **Tax Rate** – Specific to this location
 - *Street, City, State*, ZIP**** – Address details
 - *Phone, Email** – Contact info
3. Validate the address. Latitude and longitude will fill in automatically.
 4. Click **Save**.

The new location will appear in the list.



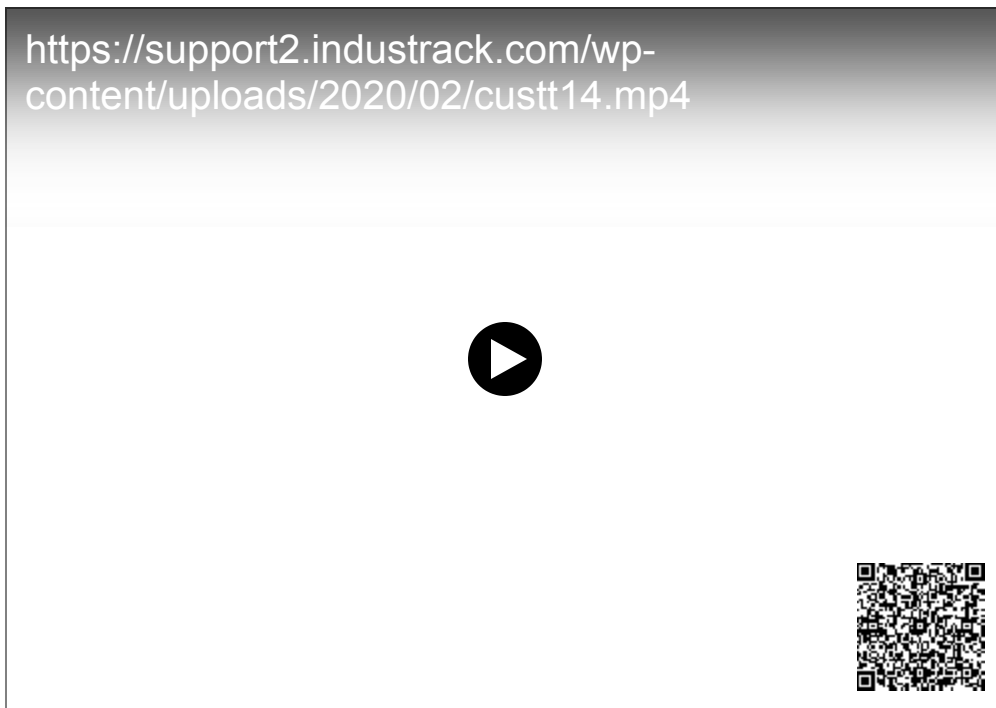
Update a Service Location

Main Service Location

1. Click the **Edit Contact** button in the customer's profile.
2. Update the address as needed.
3. Validate the address and click **Save**.

Additional Service Locations

1. Find the location in the list.
2. Click the **3-dot menu** beside it, then choose **Edit**.
3. Make your changes.
4. Validate the address and click **Save**.



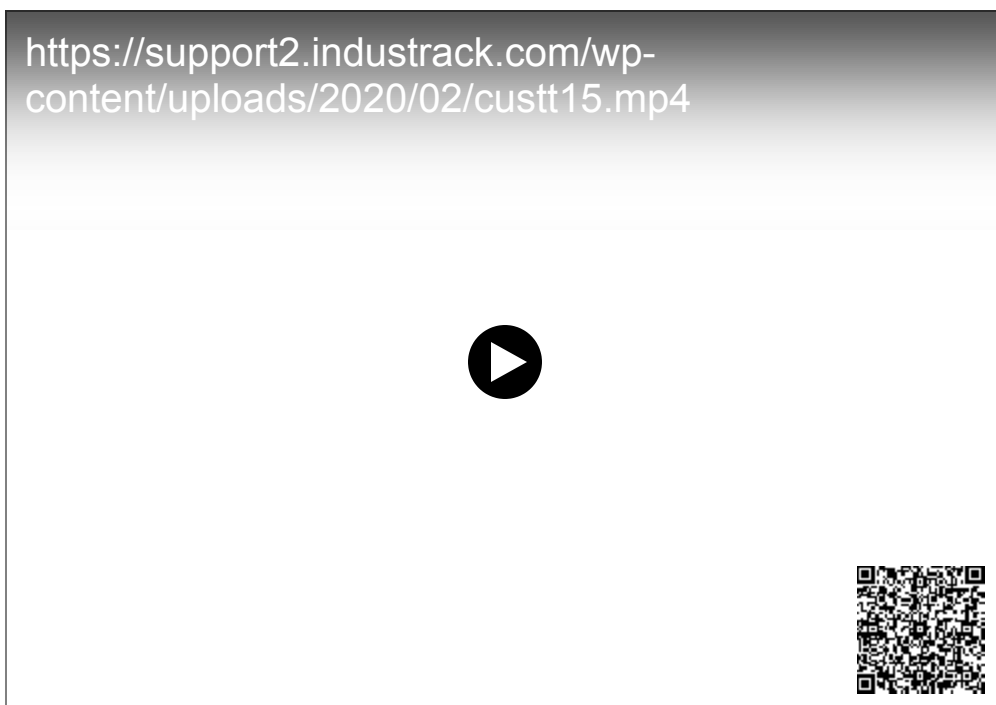
Delete a Service Location

Only additional service locations can be deleted. The **main service location cannot** be deleted. You can only update it.

To delete a service location:

1. Find the location in the list.
2. Click the **3-dot menu** and select **Delete**.
3. Confirm by selecting **Yes** on the pop-up window.
 - Select **No** if you don't want to delete it.

⚠ Warning: Deleting a service location is permanent and may affect other parts of the system.



The Service Location will be removed from the list.

