

Manage Location Settings

Introduction

After a location has been created, settings on the location can be edited which include, Labels, Promotions, Taxes, Customers, Service Zones, Notes and Address. If a Customer has more than one location on their account, these location settings must be adjusted for all locations as each location essentially serves as another account under the customer. With the exception of Customers, Notes and Address, the other settings are based on settings set by the company on the [Settings](#) chapter.

Manage Location Settings ×

Update labels, promotions, tax line items, and notes for this location.

Labels Promotions Taxes Customers Service >

LOCATION LABELS

No labels assigned to this location.

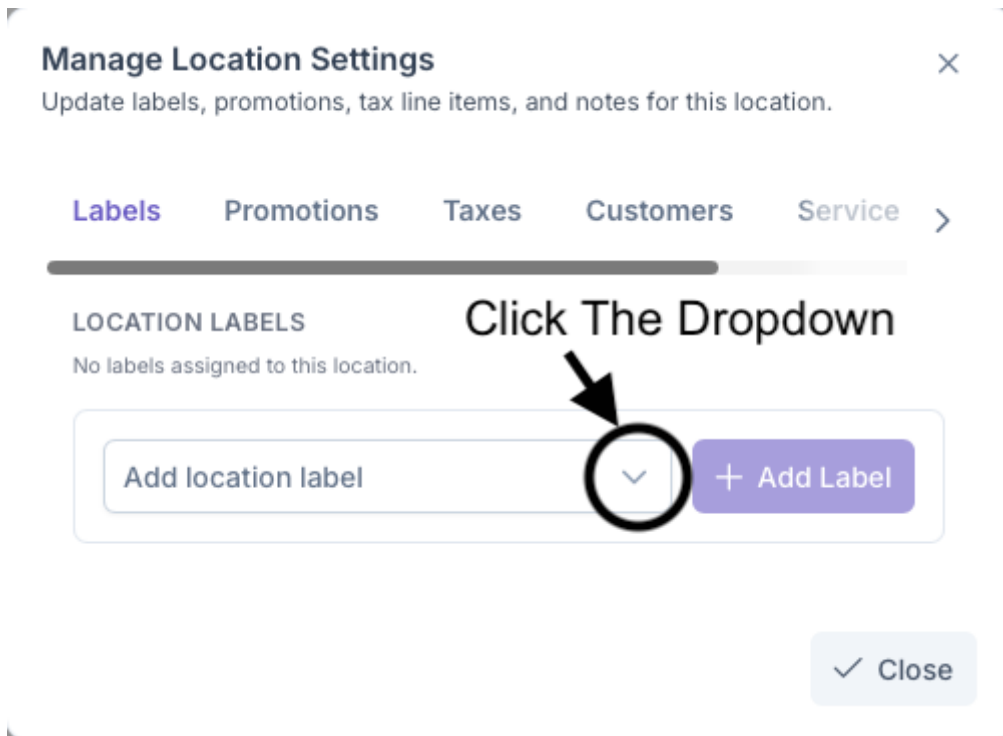
Add location label ▼ + Add Label

✓ Close

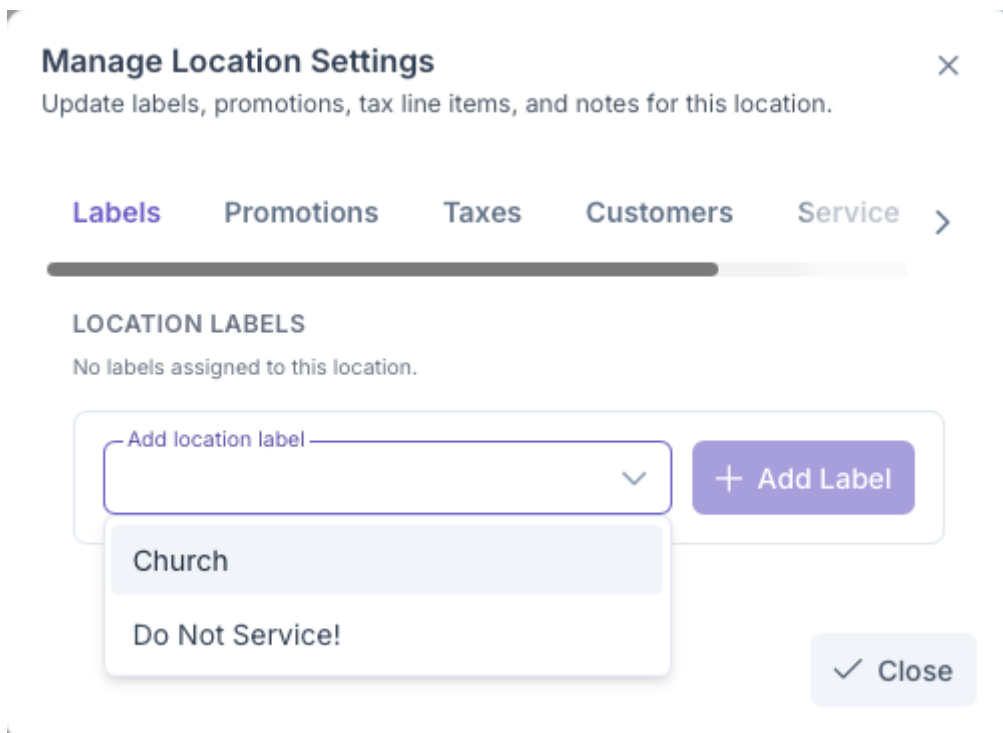
Labels

Clicking on the Labels tab will bring up the add location labels section. Here a label can be assigned to the location based on one created by the company under the Label section under Admin. Labels are primarily used to identify the type of location the customers address is, eg, a house, an apartment, a church etc. To set a label

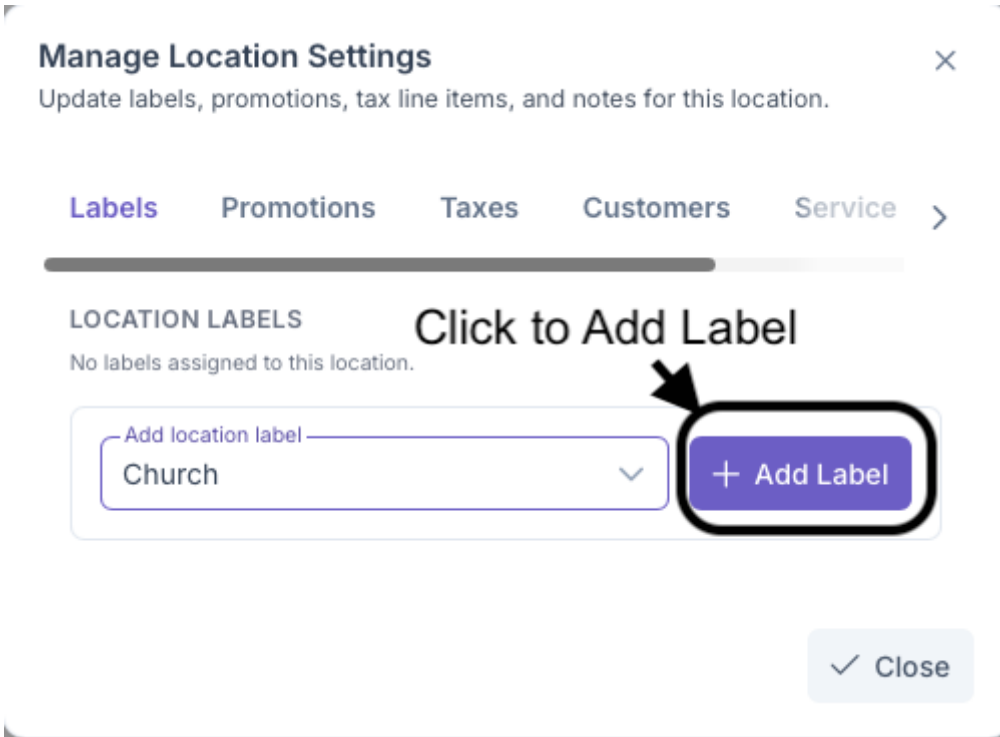
1. Click on the Add Location Label Dropdown to bring up a list of pre set labels



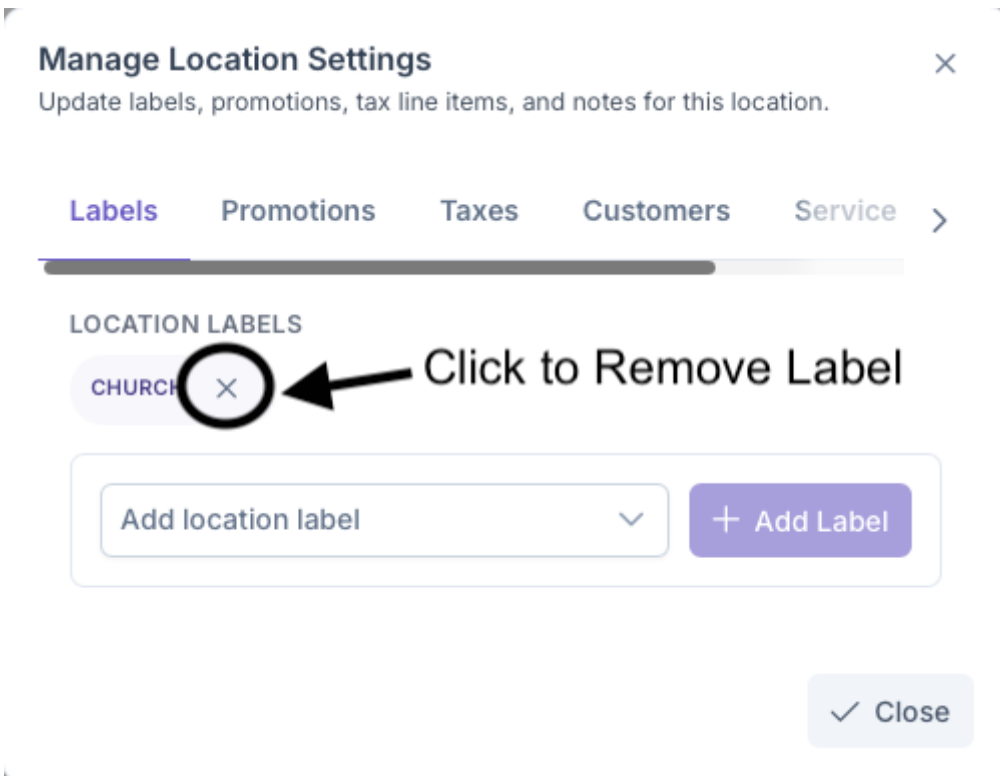
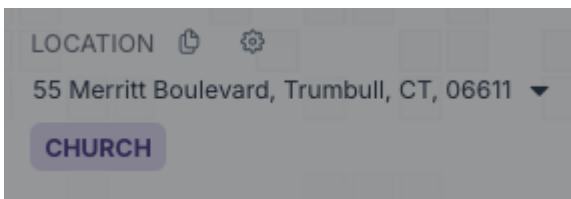
2. Select a label for the location



3. Click on Add Label to add label to the location



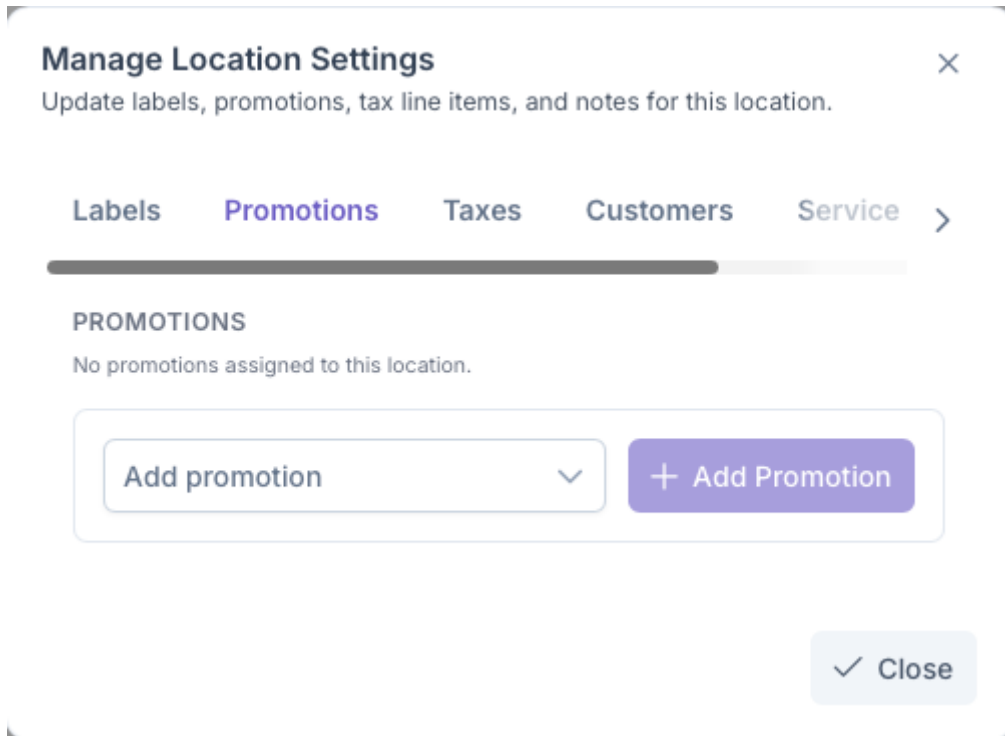
Once added, the location will now generate with a label under it. The label can be removed simply by clicking the X next to the label



Additional Labels can be created under Admin on the Settings page under Labels, a more detailed look into how to create labels can be seen on the [Labels](#) page

Promotions

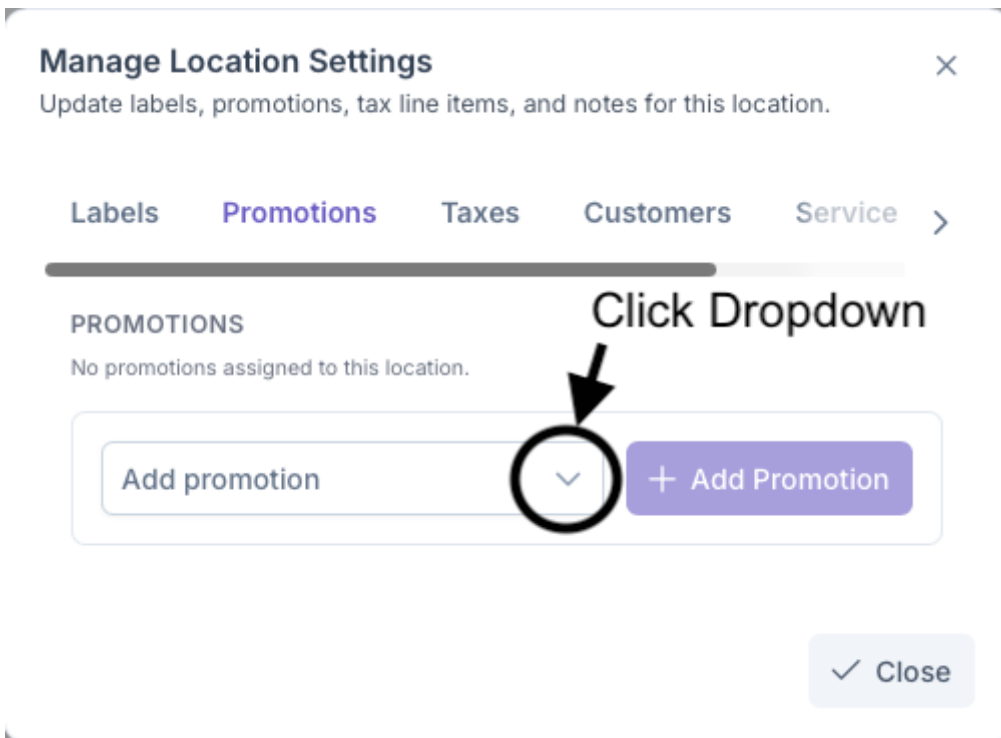
Clicking on the Promotions tab will bring up the Add Promotions sections. Here Promotions can be assigned to the customers locations, such as discounts for being a first time user or being an auto pay customer. These settings are pre set in the Promotions sections under Admin, A more indepth look into how to set Promotions can be seen on the [Promotions](#) page.



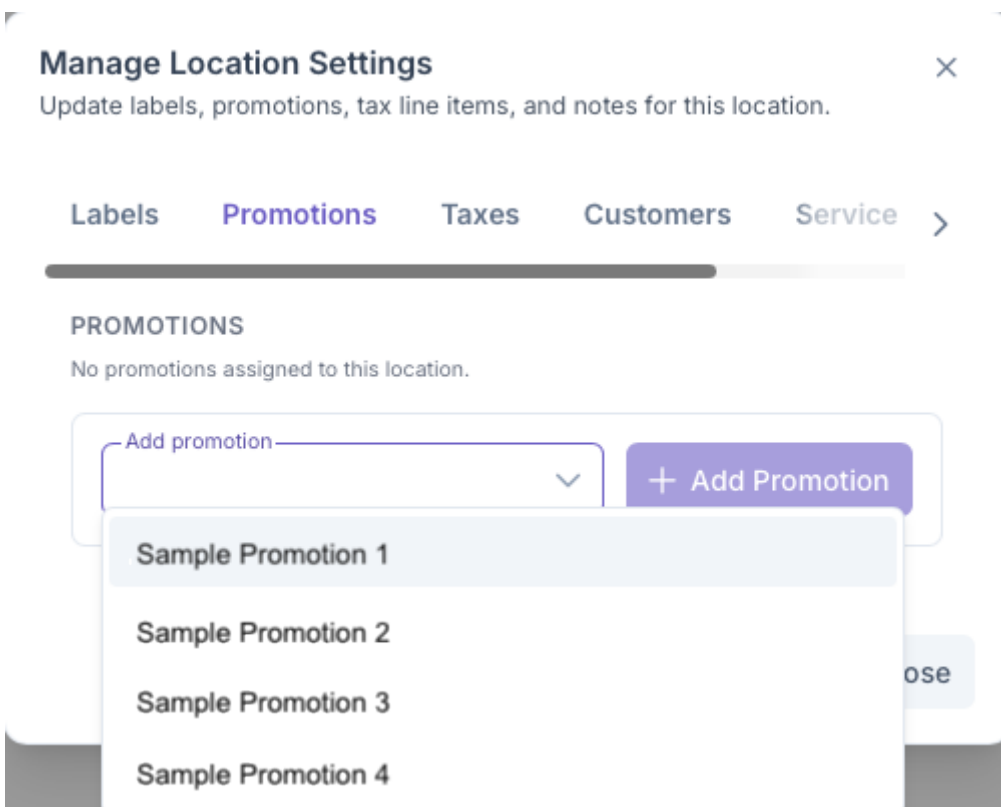
The screenshot shows a 'Manage Location Settings' dialog box with a close button (X) in the top right corner. Below the title is a subtitle: 'Update labels, promotions, tax line items, and notes for this location.' There are five tabs: 'Labels', 'Promotions' (which is selected and highlighted with a purple bar), 'Taxes', 'Customers', and 'Service'. Below the tabs, the 'PROMOTIONS' section is displayed, stating 'No promotions assigned to this location.' At the bottom of this section, there is a dropdown menu with the text 'Add promotion' and a downward arrow, followed by a purple button with a plus sign and the text '+ Add Promotion'. In the bottom right corner of the dialog box, there is a button with a checkmark and the text 'Close'.

To set a Promotion

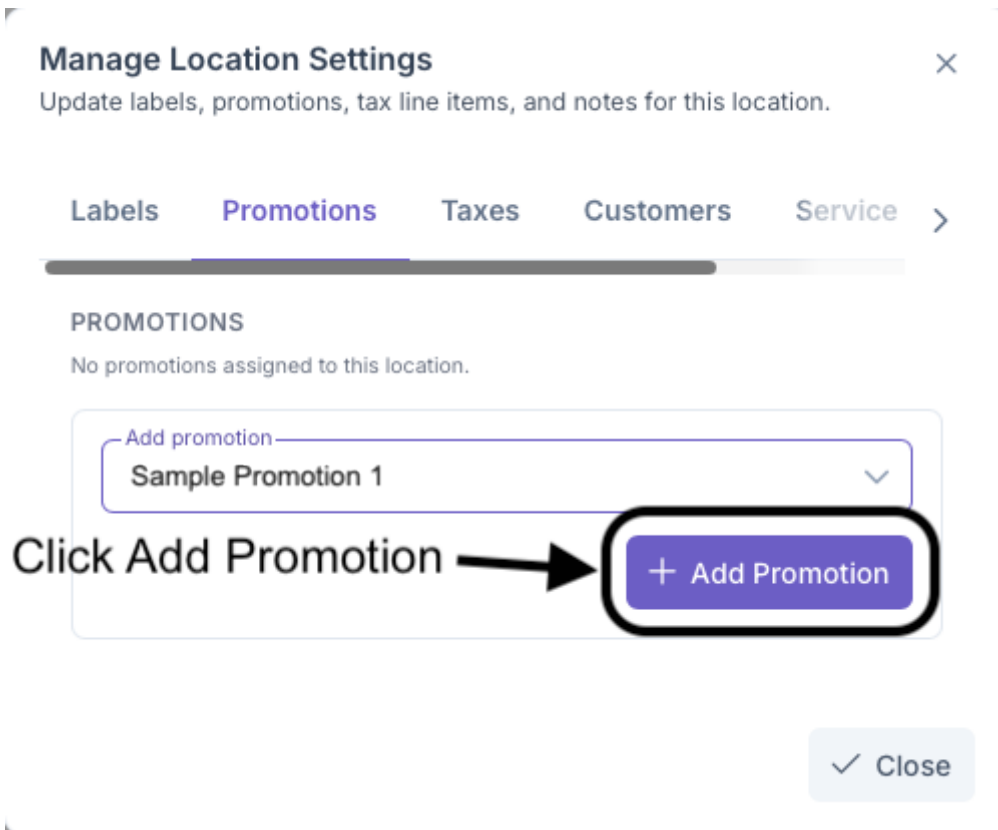
1. Click on the Add Promotion Dropdown to bring up a list of pre set promotions



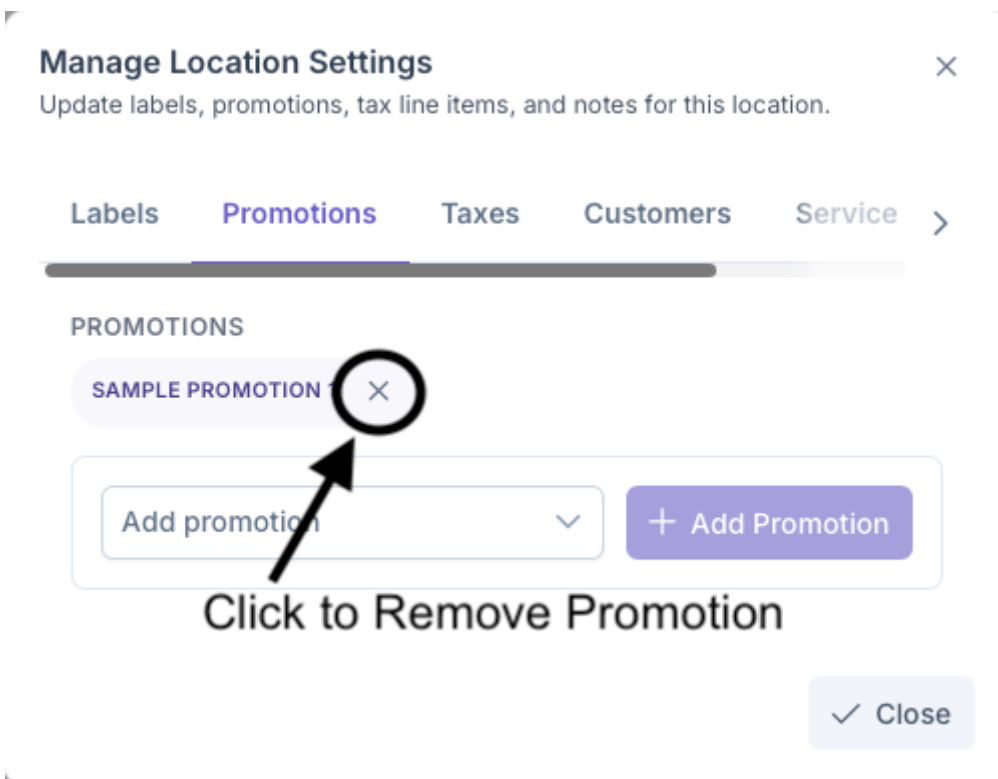
2. Select a Promotion to attach to the address



3. Click Add Promotion to add The Promotion to the Address



Once added, a promotion will now be applied to the customers account if they meet the criteria set when the promotion was created by the company. A promotion can be deleted from the account by clicking on the X next to the promotion



Taxes

Clicking on the Taxes tab will bring up the Taxes section. Here taxes can be added to the customers account based on what a company pre sets as taxes under taxes settings under the settings part of admin. Some Taxes can be set to be automatically applied to every new customer such as state taxes whereas others can be added on to the account as applicable. Taxes set to automatically be applied will show up on the customers account without needing to be added and can be seen on the taxes section.

Manage Location Settings

Update labels, promotions, tax line items, and notes for this location.

Labels

Promotions

Taxes

Customers

Service

TAX LINE ITEMS

CT Sales Tax
Rate: 6.35%

Remove

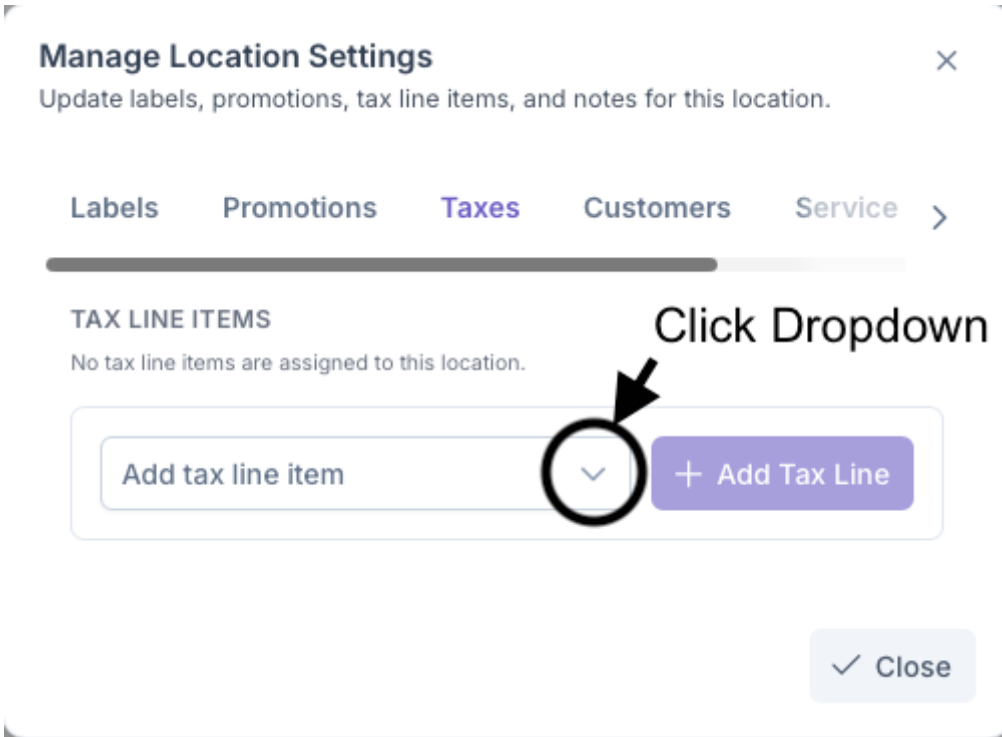
Add tax line item

+ Add Tax Line

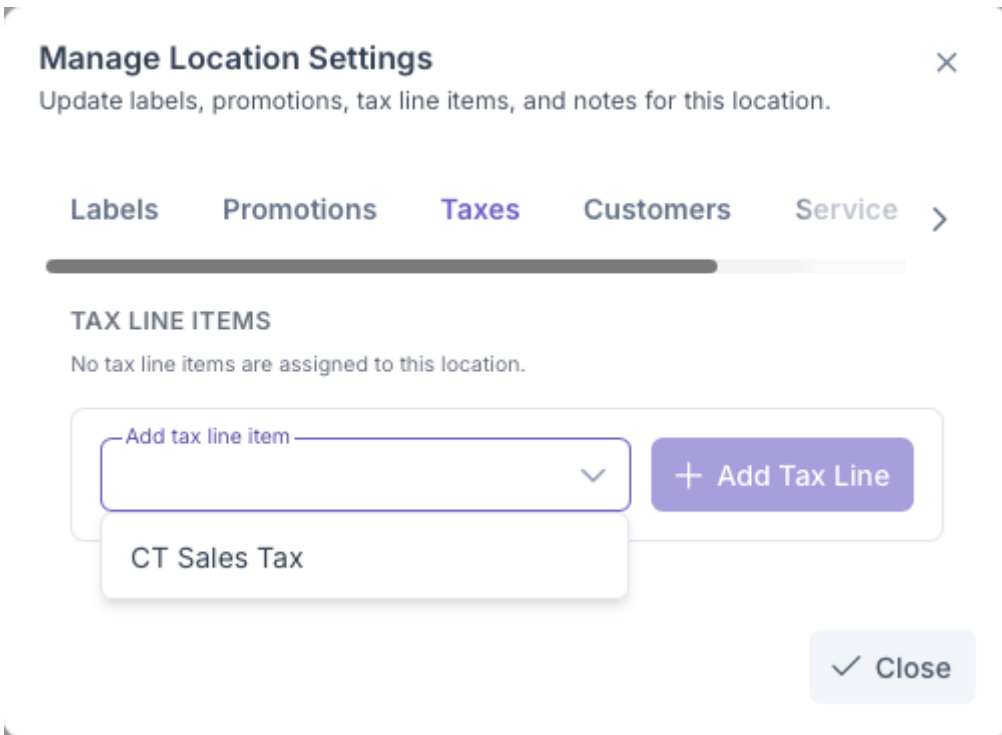
Close

To add a tax

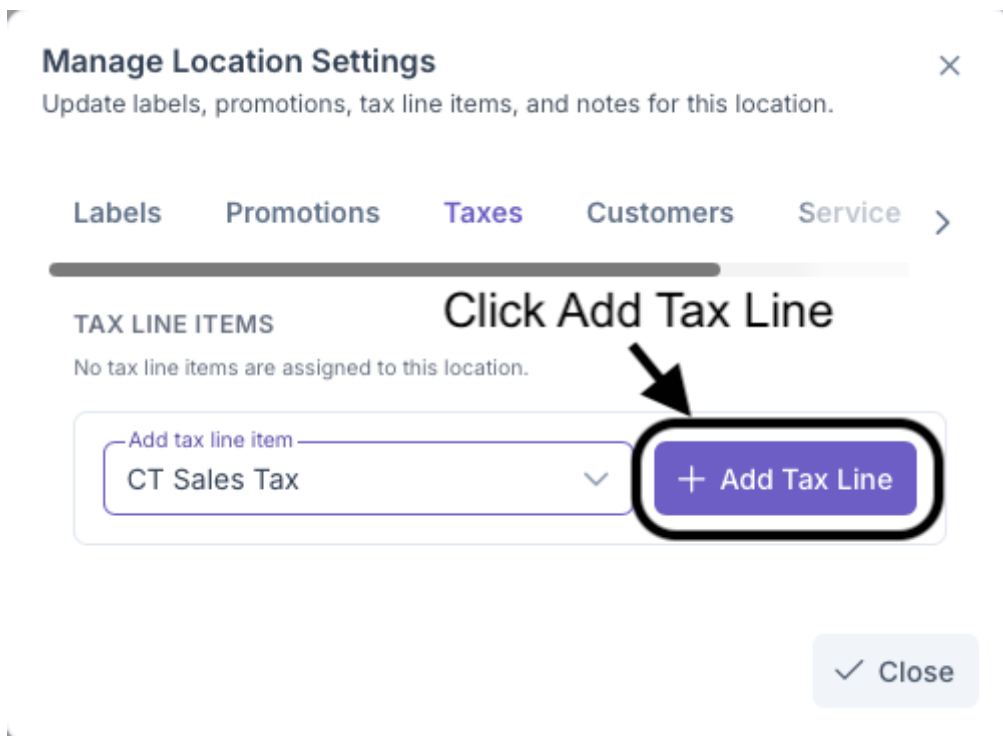
1. Click on the Add Tax line Item Dropdown



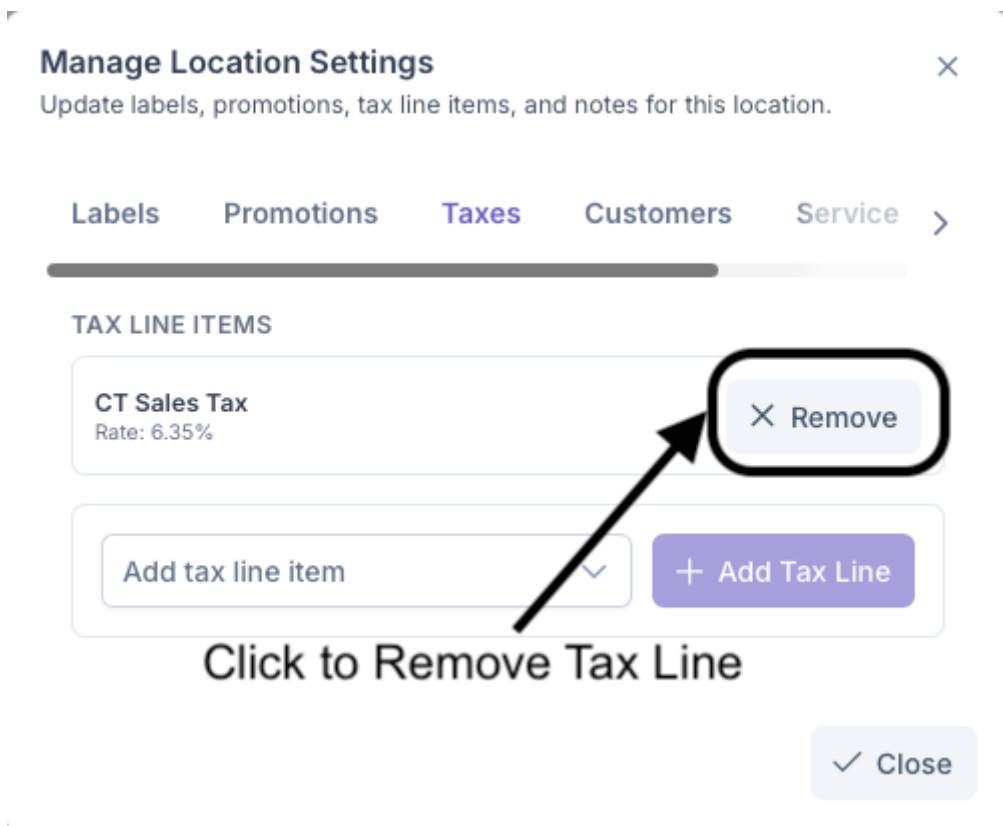
2. Select a Tax



3. Click Add Tax Line to add tax to address



Once all set or if the Tax Line was already added, Taxes will then be added to all services selected to be taxed for the Customer. Taxes can be deleted by clicking on the X next to the Tax Line



Customers

Clicking on the Customers tab will bring up the customers sections. This section here shows all customers associated with this address. A more in depth look at how customers can be linked to

the same address can be seen on the [Location Management](#) page. Customers can also be removed from an address here by clicking on remove next to the customer that is going to be removed.

Manage Location Settings

Update labels, promotions, tax line items, and notes for this location.

Labels

Promotions

Taxes

Customers

Service

LOCATION CUSTOMERS

Manage customers associated with this location and their relationships.

Mr. John Doe

Account #92157

55 Merritt Blvd, Trumbull, CT 06611, USA

Homeowner

X Remove

Jack Doe

Account #92159

55 Merritt Blvd, Trumbull, CT 06611, USA

Tenant

X Remove

✓ Close

Service Zones

Clicking on the Service Zone tab will bring up the Service Zone section. Service Zones are zones created that cover a certain range with only customers that fall under that zone. Here in this section, Customers can be added to a zone created if they fall under that area. A more in depth look in creating zones can be seen on the [Zones](#) page. To add a zone

Manage Location Settings



Update labels, promotions, tax line items, and notes for this location.

< axes Customers **Service Zone** Notes Address

SERVICE ZONE

Assign this location to a service zone for routing and scheduling.

Service Zone



✓ Apply

✓ Close

1. Click on the Service Zone Dropdown

Manage Location Settings



Update labels, promotions, tax line items, and notes for this location.

< axes Customers **Service Zone** Notes Address

SERVICE ZONE

Assign this location to a service zone for routing and scheduling.

Click The Dropdown



Service Zone



✓ Apply

✓ Close

2. Select A Zone

Manage Location Settings

Update labels, promotions, tax line items, and notes for this location.

< axes

Customers

Service Zone

Notes

Address

SERVICE ZONE

Assign this location to a service zone for routing and scheduling.

Service Zone

Service zone 1

zone 2

✓ Apply

✓ Close

3. Click Apply to add zone to Customer Location

Manage Location Settings

Update labels, promotions, tax line items, and notes for this location.

< axes

Customers

Service Zone

Notes

Address

SERVICE ZONE

Assign this location to a service zone for routing and scheduling.

Click Apply

Service Zone

Service zone 1

✕

✓ Apply

✓ Close

Once all set, the customers location will now be added to the zone selected

Manage Location Settings

Update labels, promotions, tax line items, and notes for this location.

<

axes

Customers

Service Zone

Notes

Address

SERVICE ZONE

Assign this location to a service zone for routing and scheduling.

Current Service Zone

Service zone 1

Zone 1

Service Zone

Service zone 1

X

▼

✓

Apply

✓

Close

Notes

Clicking on the Notes tab will bring up the notes section of the Location Settings. Here notes can be added to the customer location to help communicate anything relating to the customers home, or if a driver needs to alerted of something. Notes can be wrtten in the following categories

Manage Location Settings



Update labels, promotions, tax line items, and notes for this location.

[← axes](#) [Customers](#) [Service Zone](#) **[Notes](#)** [Address](#)

NOTES

Use these notes to communicate location-specific context to internal teams.

Description



Additional Note



Driver Alert



Router Note



✓ Apply

✓ Close

- Description - Give a brief description of the location or anything mentioned by the customer
- Additional Notes - Anything extra that could be important with regards to the location
- Driver Alert - Any alerts that the driver should be informed of before delivery

- Router Note - Notes that the router should know before the location is routed for delivery

Once all set, the notes will appear here, making it important to check the customers notes before any services are provided for the customer

Address

Clicking on the Address tab will bring up the Address section of the Locations settings. Here the address and coordinates of the customer will appear. The address can also be edited here in the event of the customer moving

1. Click on the Edit Address & Location Button

Manage Location Settings

×

Update labels, promotions, tax line items, and notes for this location.

< axes Customers Service Zone Notes Address

LOCATION ADDRESS

Edit the address details and coordinates for this location.

Current Address

55 Merritt Boulevard

Trumbull, CT 06611

Lat: 41.244216, Lng: -73.150024

Click To Edit Address

📍 Edit Address & Coordinates

ⓘ

Click the button above to edit the address fields and adjust the location marker on an interactive map.

✓ Close

2. The Edit Location popup will appear with the following fields that can be edited

Edit Location

Update the location details and coordinates.

Edit Address Details

Address

55 Merritt Boulevard

Address Line 2 (Apt, Suite, Unit)

City*

Trumbull

State*

CT

ZIP Code

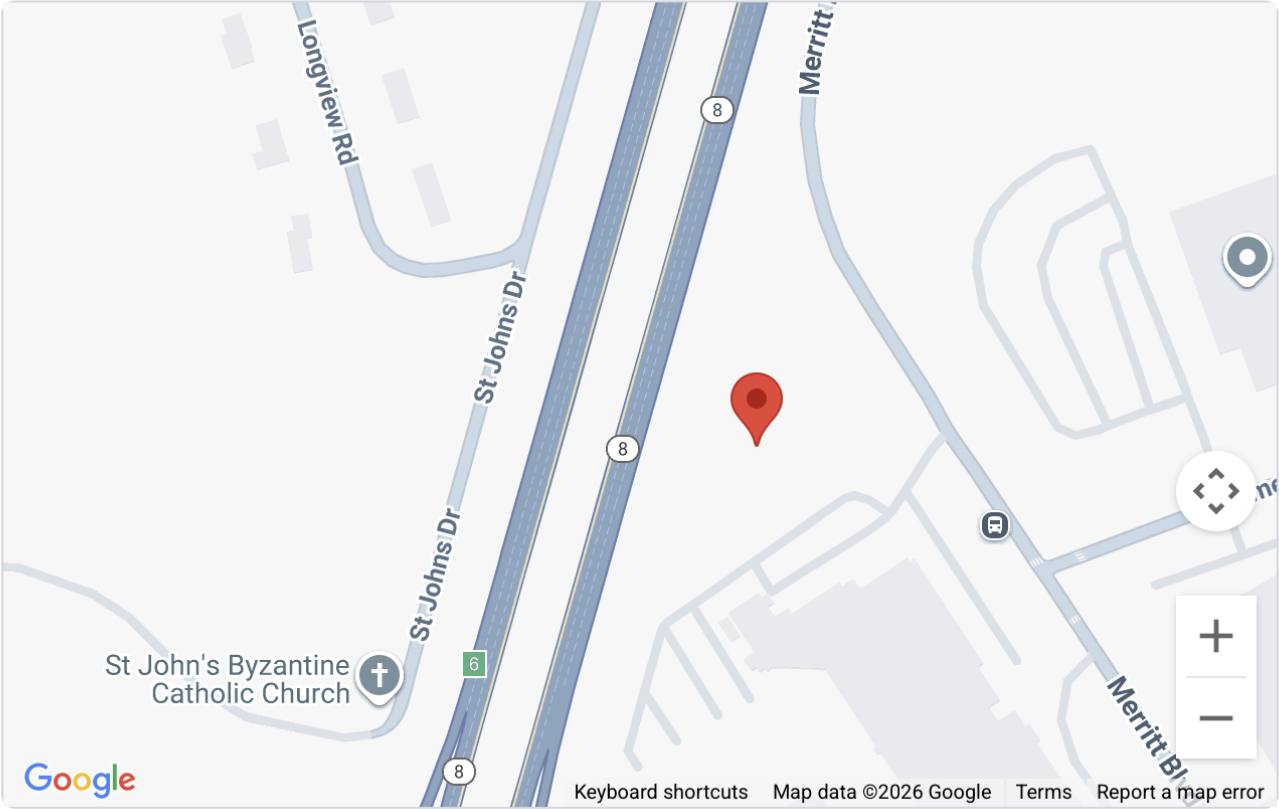
06611

Latitude

41.24421588

Longitude

-73.1500239



 Drag the marker to adjust the exact location. Address fields remain unchanged.

Cancel

 Update Location

- Address
- Address Line 2
- City
- State

- Zip Code
- Latitude and Longitude
- Coordinate Map
 - The Latitude and Longitude can only be edited by dragging the marker on the map itself

A more in depth look at editing accounts can be seen on the [Location Management](#) guide. Once all edits are complete, clicking on Update Location will update the customers address and coordinates

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