

Adding and Editing Locations

Adding additional locations is an option for Business Pro customers.

Table of Contents☰

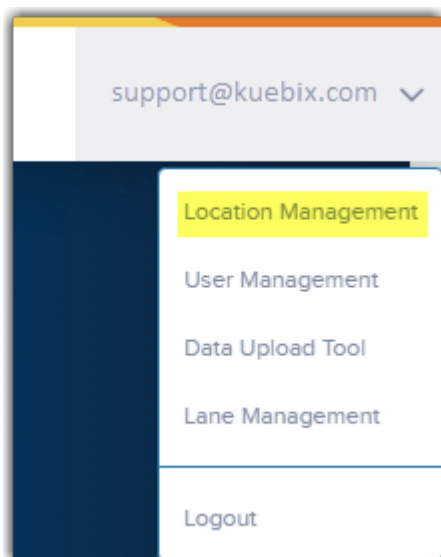
- [To add a new location](#)
 - [Optional: Set the billing address and desired default information.](#)
- [To edit an existing location](#)
- [To update a billing address or contact](#)

IMPORTANT NOTE: If you have an integration, please reach out to support@kuebix.com before updating any existing locations. Updating the information without notifying support risks issues with your integration.

To add a new location

Follow these steps to add a new location to your account:

1. In the drop-down list in the upper-right corner, select **Location Management**.



Adding and Editing Locations

2. Click **New Location**.

The screenshot shows the 'Your Kuebix Configuration' interface. At the top right, there is a dropdown menu labeled 'New Location' and a green button labeled 'NEW LOCATION' with a hand cursor icon pointing to it. Below this is a tabbed interface with five tabs: 'GENERAL' (selected), 'SHIPMENT', 'RATING', 'DOCUMENTS', and 'BILLING'. The 'GENERAL' tab contains several input fields: 'Company Name *', 'Street *', 'City *', 'State *' (a dropdown menu showing 'Select...'), 'Postal Code *', 'Country *' (a dropdown menu showing 'United States'), 'Location Order', and 'Copy Commodity Book' (a checkbox). Red exclamation mark icons are placed next to the 'Company Name *', 'Street *', 'City *', 'State *', and 'Postal Code *' fields, indicating they are required. To the right of these fields, there is a section for 'Company Logo' with a 'LOGO UPLOAD' button and the text 'Or Drop the Image Here'. A 'PLEASE NOTE' message specifies the ideal aspect ratio and accepted file types. At the bottom right of the form, there is a 'SAVE' button.

3. Complete the required fields (indicated with red exclamation mark icons) to identify the new location.

4. Click **Save**.

Optional: Set the billing address and desired default information.

To set the shipment, rating, and/or document (BOL) defaults, click on the corresponding tabs.

General shipment information, such as pickup/delivery instructions, pickup open and close times, and if you'd like a pickup confirmation email sent are on the **Shipment** tab.

Adding and Editing Locations

Your Kuebix Configuration

Books and a Comfy Chair, Inc. NEW LOCATION

GENERAL	SHIPMENT	RATING	DOCUMENTS	BILLING
Shipment Type	LTL	Pickup Open	Select...	
Shipment Mode	Dry Van	Pickup Close	Select...	
Payment Type	Outbound Prepaid	Pickup Instructions	Please bring chocolate coins for the bridge toll.	
Shipment Temp	None	Delivery Instructions	Consignee Signature:_____ Date Received:___/___/___	
Min Temp	0	Hazmat Phone	(____) ____-____	
Max Temp	0	Disable Single Shipment	☐	
		Pickup Confirmation Email	☒	

SAVE

Any default pickup or delivery accessorials can be set on the **Rating** tab. More than one accessory can be added if needed.

Adding and Editing Locations

Your Kuebix Configuration

Books and a Comfy Chair, Inc.

NEW LOCATION

GENERALSHIPMENTRATINGDOCUMENTSBILLING

Limit To Direct Rates

☐

LTL Parcel Compare

☐

Over Length Accessorial Threshold

0

Pickup Accessorials

Delivery Accessorials

Other Accessorials

Select...

2nd Man

Additional Stairs

After Hours (Pickup/Delivery)

Airport Pickup/Delivery

Blind Shipment

Bulk?

Convention/Hotel (Pickup/Delivery)

Cross Border Fee

Customs Clearance

Dangerous Goods Fee

Detention Charges

SAVE

BOL instructions can be set on the **Documents** tab.

Adding and Editing Locations

Your Kuebix Configuration

Books and a Comfy Chair, Inc.

NEW LOCATION

GENERALSHIPMENTRATINGDOCUMENTSBILLING

BOL TypeStandard

BOL Signature

Show Abbreviated Bill To

BOL Instructions

Consignee Signature:Date

Received: / /

SAVE

To set the billing address, click on the **Billing** tab.

Adding and Editing Locations

Your Kuebix Configuration

Books and a Comfy Chair, Inc. NEW LOCATION

GENERAL	SHIPMENT	RATING	DOCUMENTS	BILLING
Company Name	Books and a Comfy Chair Billing	Invoice Amount Threshold \$	3	
Street	123 Real Street	Invoice Amount Threshold %	0	
City	Maynard	Rate Quote Validation Threshold	0	
State	MA			
Postal Code	01754			
Country	United States			

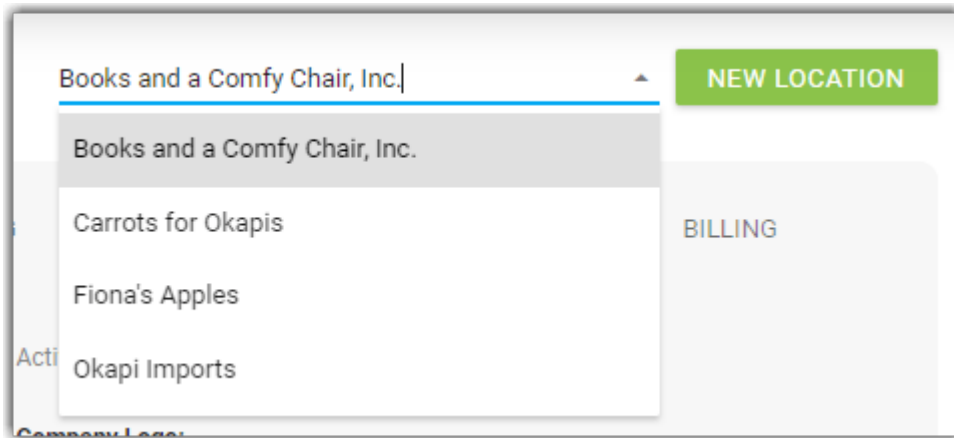
SAVE

Once the new location is created, your carrier connections will need to be added. Please see the Adding Carrier Agreements guide for helpful instructions: [Adding Carrier Agreements](#)

To edit an existing location

1. Navigate to the same Location Management screen described above for adding a location.
2. Using the drop down menu, select the desired location to adjust.

Adding and Editing Locations



The screenshot shows a web interface for managing locations. At the top, there is a search bar containing the text "Books and a Comfy Chair, Inc." with a small upward-pointing triangle to its right. To the right of the search bar is a green button labeled "NEW LOCATION". Below the search bar, a dropdown menu is open, displaying a list of location names: "Books and a Comfy Chair, Inc.", "Carrots for Okapis", "Fiona's Apples", and "Okapi Imports". The first item in the list is highlighted with a grey background. To the right of the dropdown menu, there is a light grey rectangular area with the word "BILLING" in blue capital letters. At the bottom left of the interface, the text "Active" is partially visible.

3. If you'd like to make the location inactive, uncheck the Active box.
4. Adjust the information as needed, and click Save.

To update a billing address or contact

There are two methods:

The first is to use **Location Management**, select the desired location from the drop down menu, and then click on the **Billing** tab as described in greater detail in the section **To add a new location**.

The second is by searching the location name in the search field at the top the screen and then selecting the Account Name. You can set the billing contact using this method.

Adding and Editing Locations

Home	Shipping Tools ▾	Analytics ▾	Manage Carriers ▾	More ▾	Carrots	
Accounts						
1 Result						
ACCOUNT NAME	PARENT ACCOUNT	ACCOUNT SITE	KUEBIX COMMUNITY CARRIER			
Carrots for Okapis	Books and a Comfy Chair, Inc.	Maynard, MA	☐			

After clicking on the Account Name, scroll down and find the address you'd like to update. Click on the pencil icon.

You can also use this page to update your [Default Information](#).

▼ Address Information			
Billing Address		Shipping Address	
135 This Street Is Real		135 This Street Is Real	
Maynard, MA 01754		Maynard, MA 01754	
United States		United States	

Enter the desired information, and then click Save.

Adding and Editing Locations

▼ Address Information

Billing Address

Q

Search Address

Billing Street

135 This Street Is Real

Billing City

Maynard

Billing State/Province

MA

Billing Zip/Postal Code

01754

Billing Country

United States

Billing Contact ⓘ

Search Contacts...

Q

Bill To Phone ⓘ

Bill To Email ⓘ

Pay To Contact ⓘ

Search Contacts...

Q

Shipping Address

Q

Search Address

Shipping Street

135 This Street Is Real

Shipping City

Maynard

Shipping State/Province

MA

Shipping Zip/Postal Code

01754

Shipping Country

United States

Shipping Contact ⓘ

Search Contacts...

Q

Shipping Phone ⓘ

Shipping Email ⓘ

Shipping Fax ⓘ

The fields for a billing or shipping contact are here as well.

Adding and Editing Locations

▼ Address Information

Billing Address

135 This Street Is Real

Maynard, MA 01754

United States



Google

Map data ©2024 Google

Shipping Address

135 This Street Is Real

Maynard, MA 01754

United States



Google

Map data ©2024 Google

Billing Contact

Bill To Phone

Bill To Email

Pay To Contact

Shipping Contact

Shipping Phone

Shipping Email

Shipping Fax

If you have any questions or issues, please reach out to support@kuebix.com.