

How To Add A New Customer And New Location

Step 1

Rubix Cube → Route Scheduling → PRO Data → Customers

Step 2

Click Create

Select Company Circle

Type In Company Name and Billing Information (Optional)

Click Save

Step 3

Click Edit

Click Unit Locations Tab

The screenshot shows a form with the following fields and options:

- Geolocate: Mapbox On
- Language: English
- Depot Location:
- Disposal Location:
- Tags: Tags...

At the bottom, there are four tabs: "By", "Geofence Triggered Server Actions", "Unit Locations", "Internal Notes", and "Sales &". The "Unit Locations" tab is highlighted with a red box, and a red arrow points to it from the text "Click Unit Locations Tab" above.

At the bottom of the page, there is a "Schedule activity" button and a "0" icon.

Step 4

Click Add

Tax ID

City

Geolocate Mapbox

Lat : Long:

e.g. BE0477472701

Contacts & Addresses **Visited By** **Geofence Triggers**

Total # of Units	0
Total # of Placed Units	0
Total Unit Locations	0

Add

Step 6

Fill Out Location Information

The screenshot shows a web application window titled "Create Unit Locations". At the top, there are navigation tabs: "Routing Data", "Work Orders", "Routes", and "PRO Data". The window has a toolbar with icons for "Show on Static Route", "Add Location to Static Route", "View Location On Map", and "Navigate To Location".

The main form area contains the following fields:

- Units Onsite:** A text input field containing the number "0".
- Recurrence:** A dropdown menu.
- Address:** A series of stacked text input fields for "Street...", "Street 2...", "City", "State" (with a dropdown showing "AI" and "ZII"), and "United State" (with a dropdown).
- Location Name:** A text input field with a purple highlight.
- Contact Name:** A text input field.
- Email:** A text input field.
- Phone:** A text input field.
- Mobile:** A text input field.
- Notes:** A text area containing the text "internal note...".

Below the form fields is a table with the following headers: "Unit Type", "Recurrence", "On Hand", and "Requested". The first row of the table contains a button labeled "Add a line".

At the bottom of the window, there are four buttons: "SAVE & CLOSE", "SAVE & NEW", "DISCARD", and "REMOVE".

Step 7

Click Save And Close

Click Save