



Default Ship-To Address for Dynamics 365 Business Central

Dynamics 365 Business Central provides a way to define and use different Ship-To Addresses in sales documents.

The **Default Ship-To Address app** for Dynamics 365 Business Central expands the existing functionality by providing a way to set a specific Ship-To Address as the default one to be used when creating new sales documents.

Features

The **Default Ship-To Address app** provides the following features:

- Set up a Default Ship-To Address on the customer card
- Automatic use of the Default Ship-To Address when creating new sales documents
- Easy configuration of existing customers

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Usage

To use the **Default Ship-To Address app** follow these steps:

- Select a *Default Ship-To Address* on the customer card
 1. Navigate to the customer list
 2. Open a customer card in Edit mode
 3. Scroll down the customer card to the *Shipping* FastTab

4. Locate the *Default Ship-To Address* field

The screenshot shows the Dynamics 365 Business Central interface for a customer card. The 'Shipping' section is expanded, and the 'Default Ship-To Address' field is highlighted with a red box and a red arrow. The field is currently empty.

5. Select one of the existing Ship-To Addresses for the customer as the *Default Ship-To Address*

The screenshot shows the Dynamics 365 Business Central interface for a customer card. The 'Shipping' section is expanded, and the 'Default Ship-To Address' dropdown menu is open. The menu shows a list of existing addresses, with 'DUDLEY' selected. The address details are: CODE: DUDLEY, NAME: The Cannon Group PLC, CITY: Dudley.

- Create a Sales Document*

1. Navigate to the Sales Orders list
2. Click on New to create a new Sales Order
3. Select customer 10000 The Cannon Group PLC
4. Scroll down to the *Shipping and Billing* section
5. The *Ship-To* field will indicate that an Alternate Shipping Address has been used. The *Code* field will be filled in with the Ship-To Address code selected on the customer card. The *Address* fields

(Address, City, Post Code, etc.) will contain the specific information set on the Ship-To Address.

***NOTE: The *Default Ship-To Address* is used in the following Sales Documents: Quote, Blanket Order, Order, Invoice. It will not be used in the following documents: Return Order, Credit Memo.**

Setup

The **Default Ship-To Address** app requires some setup to be done to be able to use the functionality provided by the app.

Permissions

The **Default Ship-To Address** app creates a Permission Set called CLIPDEFSHIPTOADDRESS that provides access to the different objects created by the app.

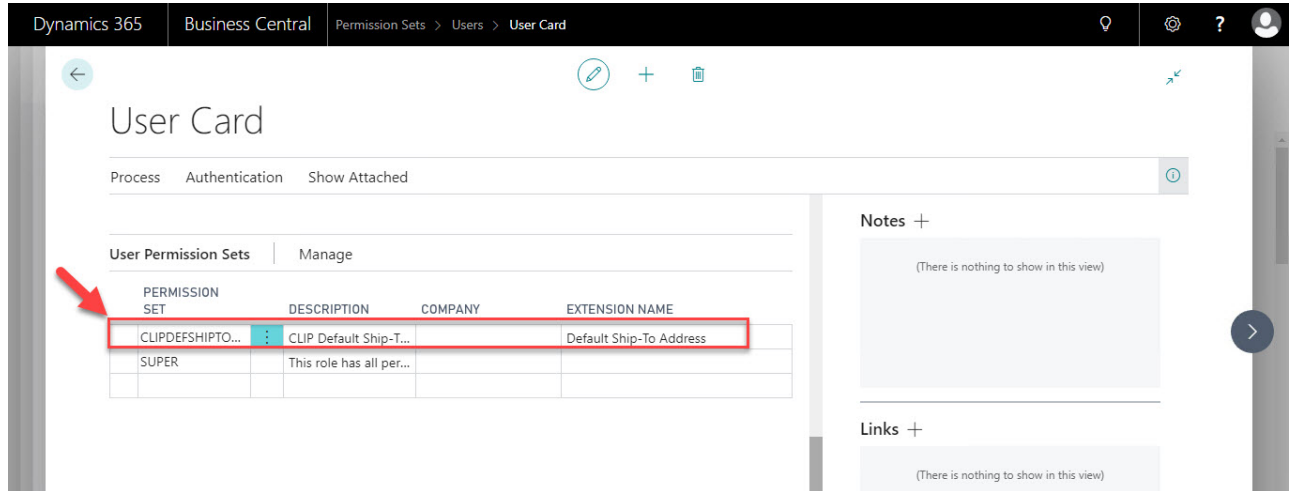
PERMISSION SET	NAME	TYPE	EXTENSION NAME
CLIPDEFSHIPTO...	CLIP Default Ship-To A...	Extension	Default Ship-To Address
ESSENTIALBUSI...	Essential Business Hea...	Extension	Essential Business Headlines
INTELLIGENTCL...	Intelligent Cloud Base	Extension	Intelligent Cloud Base
INTELLIGENTCL...	Intelligent Cloud Busin...	Extension	Business Central Intelligent Cloud
PAYPALSTANDA...	PayPalStandard Permis...	Extension	PayPal Payments Standard
PAYPALSTANDA...	PayPalStandard Read P...	Extension	PayPal Payments Standard
SALESANDINVE...	Sales And Inventory Fo...	Extension	Sales and Inventory Forecast
ADCS ALL	ADCS User	System	
ADCS SETUP	ADCS Set-up	System	
BANKSTATEMNT...	Bank Statement Servic...	System	
BASIC	Basic User (All Inclusive)	System	
CASHFLOW	Cash Flow Total	System	
CHANGELOG-DE...	Delete Change Log Ent...	System	
CHANGELOG-SE...	Setup Change Log	System	
CHANGELOG-VI...	View Change Log Entries	System	
COST	Cost Accounting	System	

System Permissions		
OBJECT TYPE	OBJECT ID	OBJECT NAME
(There is nothing to show in this view)		
Tenant Permissions		
OBJECT TYPE	OBJECT ID	OBJECT NAME
Codeunit	70118270	CLIP DFTA Def...
Codeunit	70118290	CLIP DFTA Not
Codeunit	70118300	CLIP DFTA Wiz...
Page	70118300	Default Ship-To

Assign the CLIPDEFSHIPTOADDRESS Permission Set to all the users that will either select *Default Ship-To Address* to customers, or that will create Sales Documents for customers that use a *Default Ship-To Address*.

To do so follow these steps:

1. Navigate to the Users list
2. Select the user to which you want to grant access to the **Default Ship-To Address app**
3. Open its User card in Edit mode
4. Scroll down to the *User Permission Sets* FastTab
5. Create a new line selecting the CLIPDEFSHIPTOADDRESS Permission Set



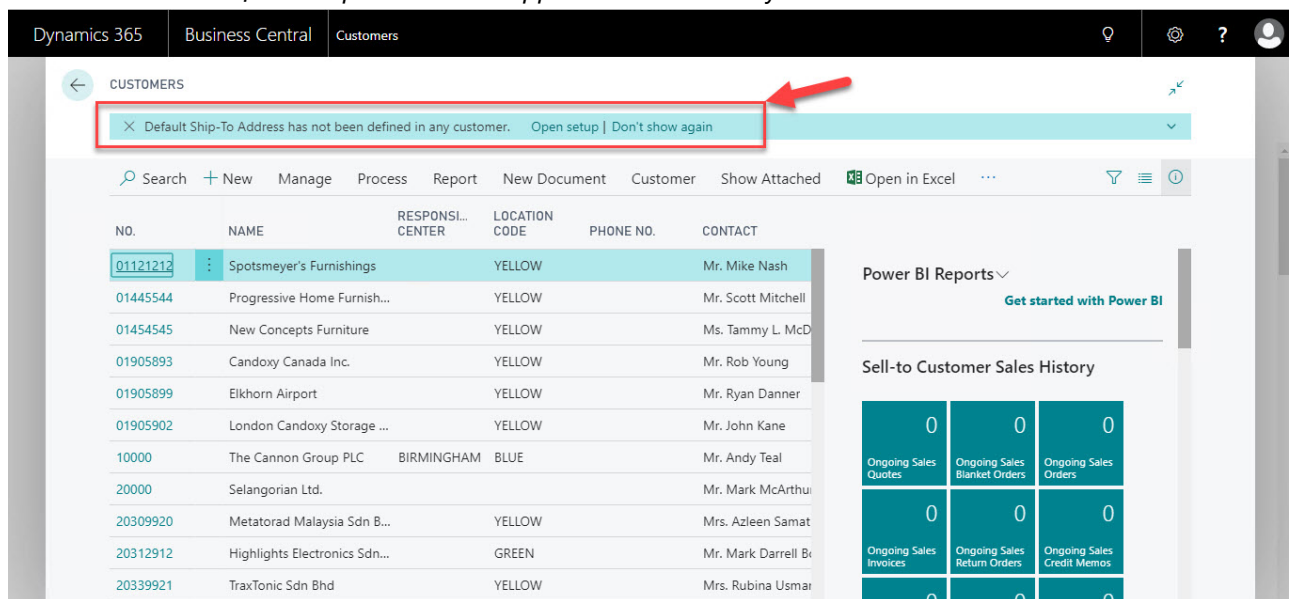
Configuring existing customers

Selecting a *Default Ship-To Address* on a customer is usually done on a card by card basis.

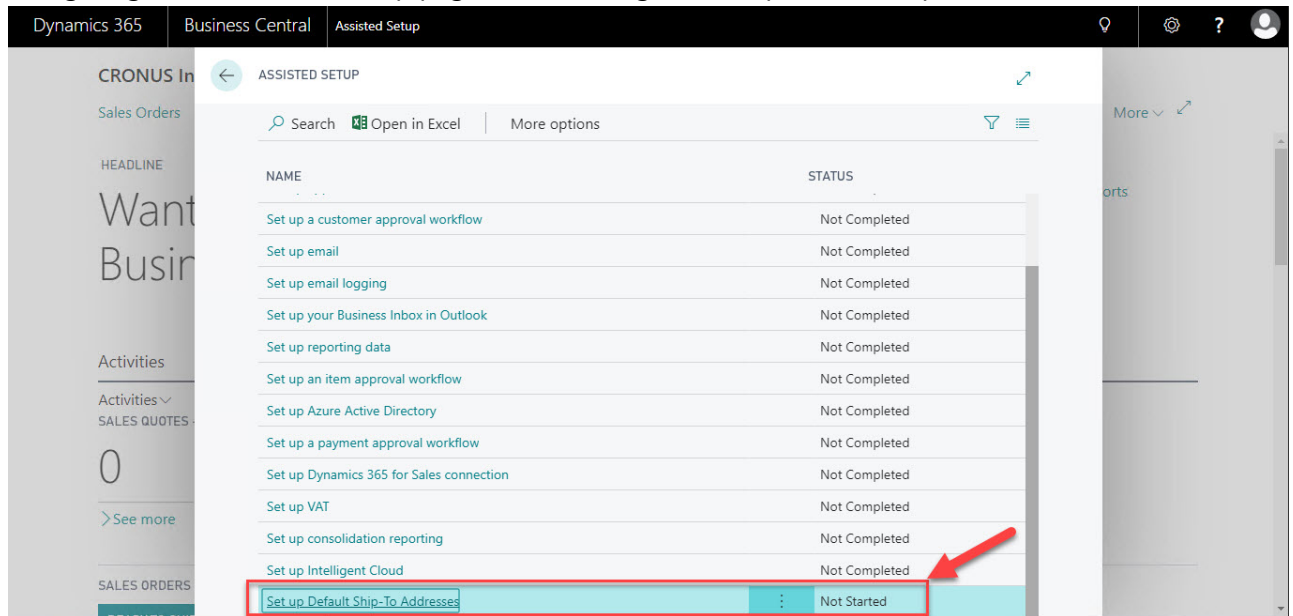
However, the **Default Ship-To Address app** provides an easy way of configuring all existing customers when installing the app. This quick configuration is done through an Assisted Setup.

You can access the Default Ship-To Address Assisted Setup in two different ways:

1. By clicking the *Open Setup* link on the Notification that appears on the Customer List when the system detects that the *Default Ship-To Address app* is not used in any customer

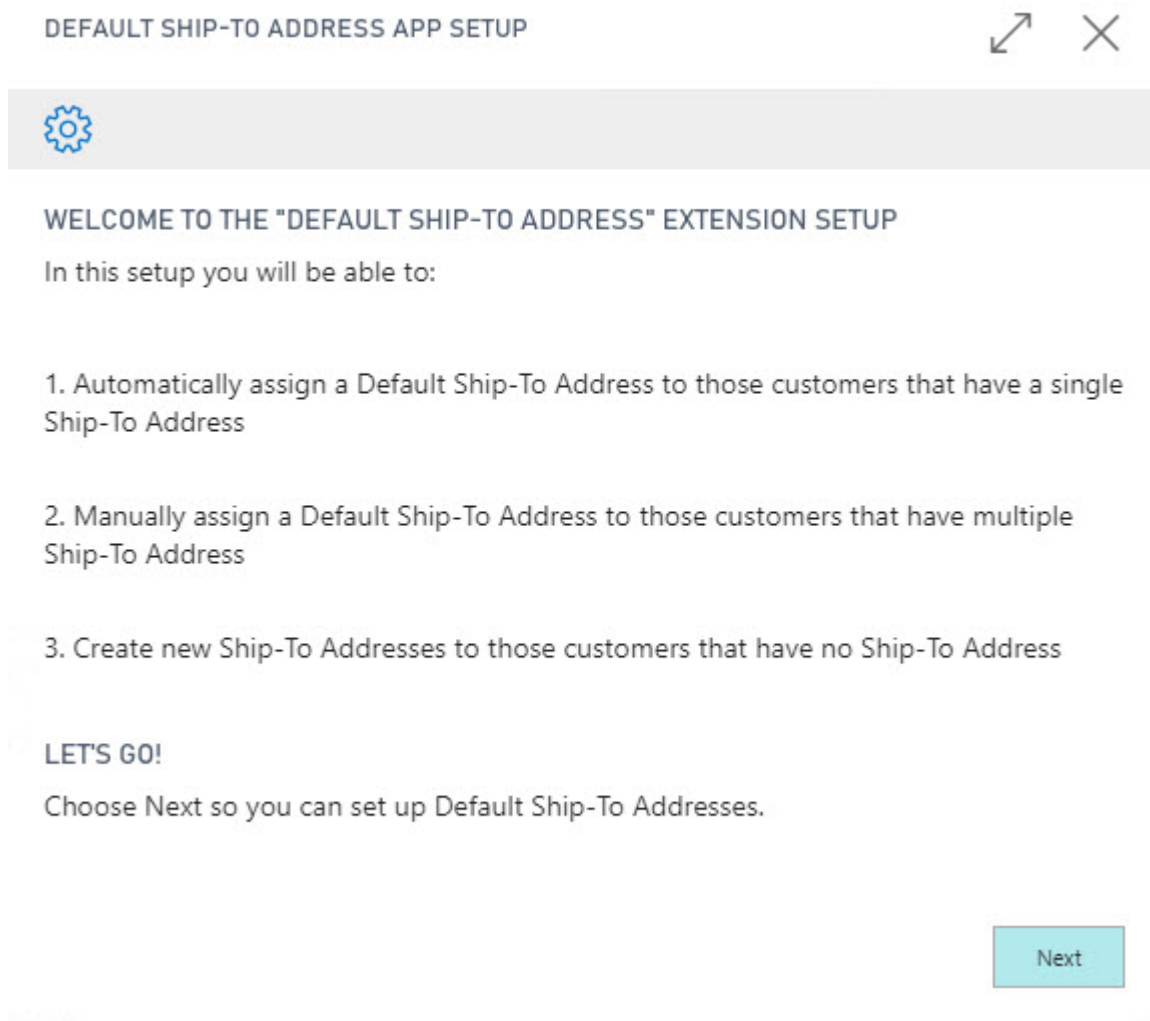


2. Navigating to the Assisted Setup page and selecting the *Set up Default Ship-To Addresses*



Once the Assisted Setup for the **Default Ship-To Address app** opens, follow these steps:

1. Read the welcome page and click Next



2. A list of all the customers that have a single Ship-To Address will be shown

DEFAULT SHIP-TO ADDRESS APP SETUP

CUSTOMERS WITH A SINGLE SHIP-TO ADDRESS

Manually select a Default Ship-To Address on those customers for which you want to use this functionality, or use the Fill Default Ship-To Address button to set the Default Ship-To Address for all the customers that have a single Ship-To Address

NO.	NAME	DEFAULT SHIP-TO ADDRESS	NO. OF SHIP-TO ADDRESSES
			0

Fill Default Ship-To Address

Back

Next

In this page you can manually select a *Default Ship-To Address* on the different customers, or you can use the *Fill Default Ship-To Address* button to automatically set the *Default Ship-To Address* field on all the customers shown on this page.

Click Next once you are done setting up customers on this page.

- 3. A list of all the customers that have multiple Ship-To Address will be shown

DEFAULT SHIP-TO ADDRESS APP SETUP



CUSTOMERS WITH MULTIPLE SHIP-TO ADDRESS

Manually select a "Default Ship-To Address" on those customers for which you want to use this functionality

NO.	NAME	DEFAULT SHIP-TO ADDRESS	NO. OF SHIP-TO ADDRESSES	
10000	The Cannon Group PLC	DUDLEY	2	⋮
20000	Selangorian Ltd.		2	

Back

Next

In this page you can manually select a *Default Ship-To Address* for the shown customers.

Click Next once you are done setting up customers on this page.

4. A list of all the customer that have no Ship-To Address will be shown ![Assisted Setup]

DEFAULT SHIP-TO ADDRESS APP SETUP

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CUSTOMERS WITH NO SHIP-TO ADDRESS

Create Ship-To Addresses on those customers for which you want to use this functionality, and select them as Default Ship-To Address

NO.	NAME	DEFAULT SHIP-TO ADDRESS	NO. OF SHIP-TO ADDRESSES	
01121212	Spotsmeyer's Furnishings		0	⋮
01445544	Progressive Home Furnish...		0	
01454545	New Concepts Furniture		0	
01905893	Candoxy Canada Inc.		0	
01905899	Elkhorn Airport		0	
01905902	London Candoxy Storage ...		0	
20309920	Metatorad Malaysia Sdn B...		0	
20312912	Highlights Electronics Sdn...		0	

Ship-to Addresses Back Next

In this page you can create Ship-To Addresses for the customers shown on the list by using the Ship-To Address button, and then you can manually assign the newly created Ship-To Address as the *Default Ship-To Address*.

Click Next once you are done setting up customers on this page.

5. Click Finish to finalize the assisted setup.

Contact

Visit <https://clipdynamics.com/apps/contact> to know the different methods in which you can contact us.

Change Log

Version 1.0.0.0 - January 2019

Initial release of the App that includes:

- A way of defining a *Default Ship-To Address* on the customer card
- Automatic usage of the *Default Ship-To Address* when creating new sales documents (excluding the following document type: Return Order, Credit Memo)
- An assisted setup
- A notification upon opening the Customer list when the app is not set up.