ClipDynamics

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

Dynamic	s 365	Business Central	Customers > 1000	0 · The Cannon Group PLC			Ç	2	Ô	?	0
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5. Select one of the existing Ship-To Addresses for the customer as the Default Ship-To Address

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100	000 · The C	annon Gr	oup PLC						
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- 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.

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	Release Pre	epare C	Order	Documents	🖻 Order C	onfirmation	Posting	Request A	Approval	Show Attached	More o	ptions	(i)	
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	Address	21	Lewes Ro	ad					- 1	U	U	U		
	Address 2								- 1	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos		
	City	Du	udley						- 1	6	3	1		
	Post Code	DY	Y5 4DJ						- 1	Posted Sales	Posted Sales	Posted Sales Return		

*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.

Dynamics 3	Business Cer	ntral Permission Sets	Q	© ?	
← P	ERMISSION SETS	·		7 ^K	
		💀 Edit List 🗙 Delete 🏻 P	rocess Show Attached 🛛 Open in Excel 🛛 More options 🖓 🔳	()	
	PERMISSION SET	NAME TYPE			-
	CLIPDEFSHIPTO	CLIP Default Ship-To A Ext	ension Default Ship-To Address		
	ESSENTIALBUSI	Essential Business Hea Ext	ension Essential Business Headlines		
	INTELLIGENTCL	Intelligent Cloud Base Ext	ension Intelligent Cloud Base OBJECT		1.00
	INTELLIGENTCL	Intelligent Cloud Busin Ext	ension Business Central Intelligent Cloud		
	PAYPALSTANDA	PayPalStandard Permis Ext	ension PayPal Payments Standard (There is nothing to show in this view)		
	PAYPALSTANDA	PayPalStandard Read P Ext	ension PayPal Payments Standard		
	SALESANDINVE	Sales And Inventory Fo Ext	ension Sales and Inventory Forecast		
	ADCS ALL	ADCS User Sys	tem Tenant Permissions V		
	ADCS SETUP	ADCS Set-up Sys	tem OBJECT		
	BANKSTATEMNT	Bank Statement Servic Sys	tem TYPE OBJECT ID OBJECT NAM	£	
	BASIC	Basic User (All Inclusive) Sys	tem Codeunit : 70118270 CLIP DFTA De	Æ	
	CASHFLOW	Cash Flow Total Sys	tem Codeunit 70118290 CLIP DFTA No	t l	
	CHANGELOG-DE	Delete Change Log Ent Sys	tem Codewrit 70118300 CLIP DETA Wi	-	
	CHANGELOG-SE	Setup Change Log Sys	tem		
	CHANGELOG-VI	View Change Log Entries Sys	tem Page 70118300 Default Ship-	C I	
	COST	Cost Accounting Sys	tem		-

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 gran 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

User Card	t c			
Process Authentic	ation Show Attached			(j)
			Notes $+$	
User Permission Sets	Manage		(There is nothing to show in this view)	
PERMISSION	DESCRIPTION COMPANY	EXTENSION NAME		
CLIPDEFSHIPTO	CLIP Default Ship-T	Default Ship-To Address		
	This role has all per			
SUPER				

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 Addres 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

CUSTOMERS									7
× Default	Ship-To Address has not	t been defined in any cust	omer. Open setu	ıp Don't show ag	gain				~
₽ Search	+ New Manage	e Process Report	New Docume	ent Customer	r Show Attached	🛯 Open in Exc	el …	7	≣ 0
N0.	NAME	RESPONSI CENTER	LOCATION CODE	PHONE NO.	CONTACT				
01121212	: Spotsmeyer's Fur	nishings	YELLOW		Mr. Mike Nash	Power BI R	eports∨		
01445544	Progressive Hom	e Furnish	YELLOW		Mr. Scott Mitchell		Gets	started with Pov	ver Bl
01454545	New Concepts Fu	irniture	YELLOW		Ms. Tammy L. McD				
01905893	Candoxy Canada	Inc.	YELLOW		Mr. Rob Young	Sell-to Cus	tomer Sales	History	
01905899	Elkhorn Airport		YELLOW		Mr. Ryan Danner			-	
01905902	London Candoxy	Storage	YELLOW		Mr. John Kane	0	0	0	
10000	The Cannon Grou	IP PLC BIRMINGHAN	1 BLUE		Mr. Andy Teal	Ongoing Sales	Ongoing Sales	Ongoing Sales	
20000	Selangorian Ltd.				Mr. Mark McArthu	Quotes	Blanket Orders	Orders	
20309920	Metatorad Malay	sia Sdn B	YELLOW		Mrs. Azleen Samat	0	0	0	
20312912	Highlights Electro	onics Sdn	GREEN		Mr. Mark Darrell B	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos	
	T T . C . D.	4	VELLOW		Mrs. Rubina Usmar				

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

Dynamics 365	Business Central	Assisted Setup		♀ ◎ ?	0
CRONUS		SETUP		2	
Sales Order	rs 🔎 Sear	ch 🖉 Open in Excel 🛛 More options	Y	Y i≣ More ∨ 🖉	
HEADLINE	NAME		STATUS		Î
War	nt Set up a d	customer approval workflow	Not Completed	orts	
Ruci	Set up en	nail	Not Completed		
DUS	Set up en	nail logging	Not Completed		
	Set up yo	ur Business Inbox in Outlook	Not Completed		
Activities	Set up rej	porting data	Not Completed		
	Set up an	item approval workflow	Not Completed		
Activities ~ SALES QUOT	Set up Az	zure Active Directory	Not Completed		
0	Set up a p	payment approval workflow	Not Completed		
0	Set up Dy	ynamics 365 for Sales connection	Not Completed		
>See more	e Set up VA	AT	Not Completed		
	Set up co	nsolidation reporting	Not Completed		
SALES OPPE	Set up Int	telligent Cloud	Not Completed		
SALES UNDE	Set up De	efault Ship-To Addresses	Not Started		-

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

1. Read the welcome page and click Next

DEFAULT SHIP-TO ADDRESS APP SETUP

WELCOME TO THE "DEFAULT SHIP-TO ADDRESS" EXTENSION SETUP

In this setup you will be able to:

1. Automatically assign a Default Ship-To Address to those customers that have a single Ship-To Address

 Manually assign a Default Ship-To Address to those customers that have multiple Ship-To Address

3. Create new Ship-To Addresses to those customers that have no Ship-To Address

LET'S GO!

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Choose Next so you can set up Default Ship-To Addresses.

Next

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

DEFAULT SHIP-TO ADDRESS APP SETUP

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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. SHIP ADDRESS	OF -TO SES
				0
			-	

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

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CUSTOMERS WITH MULTIPLE SHIP-TO ADDRESS

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

		DEFAULT	N0. 0F	
		SHIP-TO	SHIP-TO	
NO.	NAME	ADDRESS	ADDRESSES	
10000	The Cannon Group PLC	DUDLEY	2	1
20000	Selangorian Ltd.		2	

Back	Next
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10. A. A.

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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CU	STOMERS WIT	H NO SHIP-TO ADDRESS				
Cre fun	ate Ship-To A octionality, and	ddresses on those customers fo I select them as Default Ship-To	or which you wa o Address	ant to use this		1
	N0.	NAME	DEFAULT SHIP-TO ADDRESS	NO. OF SHIP-TO ADDRESSES		
	01121212	Spotsmeyer's Furnishings		0	÷	
	01445544	Progressive Home Furnish		0		
	01454545	New Concepts Furniture		<u>0</u>		
	01905893	Candoxy Canada Inc.		0		
	01905899	Elkhorn Airport		0		
	01905902	London Candoxy Storage		0		
	20309920	Metatorad Malaysia Sdn B		0		
	20312012	Highlights Electronics Sdn		0		

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 realease 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.