KONICA MINOLTA

User Documentation Ship-To Address Management

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Prinzip Partnerschaft

Index

- Ship-To Address Management 3
  - Functional Description.....3
  - Background.....3
  - Prerequisites for Usage.....3
  - Setup.....4
  - Usage.....7
  - Usage Scenario 9

Ship-To Address Management

Functional Description

In most Systems, there are many alternative Ship-To Addresses for every customer. The App **Ship-To Address Management** can be used in two different ways, to manage this Ship-To Addresses, so the users can easily select and apply the needed Ship-To Address within their processes.
One way to use the Ship-To Address Management is to define one Ship-To Address as the primary Ship-To Address for a customer. With this Setup there can be only one Ship-To Address marked as primary Ship-To Address. In the Sales and Service processes, this primary Ship-To Address will be applied automatically to the documents, when a new one is created or the Customer changes.
The other way to use the Ship-To Address Management is to setup more preferred Ship-To Addresses. Therefore, the user can mark more than one Ship-To Addresses as preferred. When selecting a customer in sales or services processes, a dialog will be displayed with the marked preferred Ship-To Addresses, from which the user can apply it to the document.
The manual selection of a Ship-To Address in the sales and service documents was not changed. It is always possible to change a Ship-To Address manually.

Background

In most Systems, there are many alternative Ship-To Addresses for every customer. The Ship-To Address Management was intended to ease the manual search for the correct Ship-To Address for his sales or service processes. In the usage of a primary Ship-To Address, the setup Ship-To Address will be applied automatically to the document and the user do not have to act manually. This improves the efficiency in sales and service processes and allows the user to focus on his main tasks.

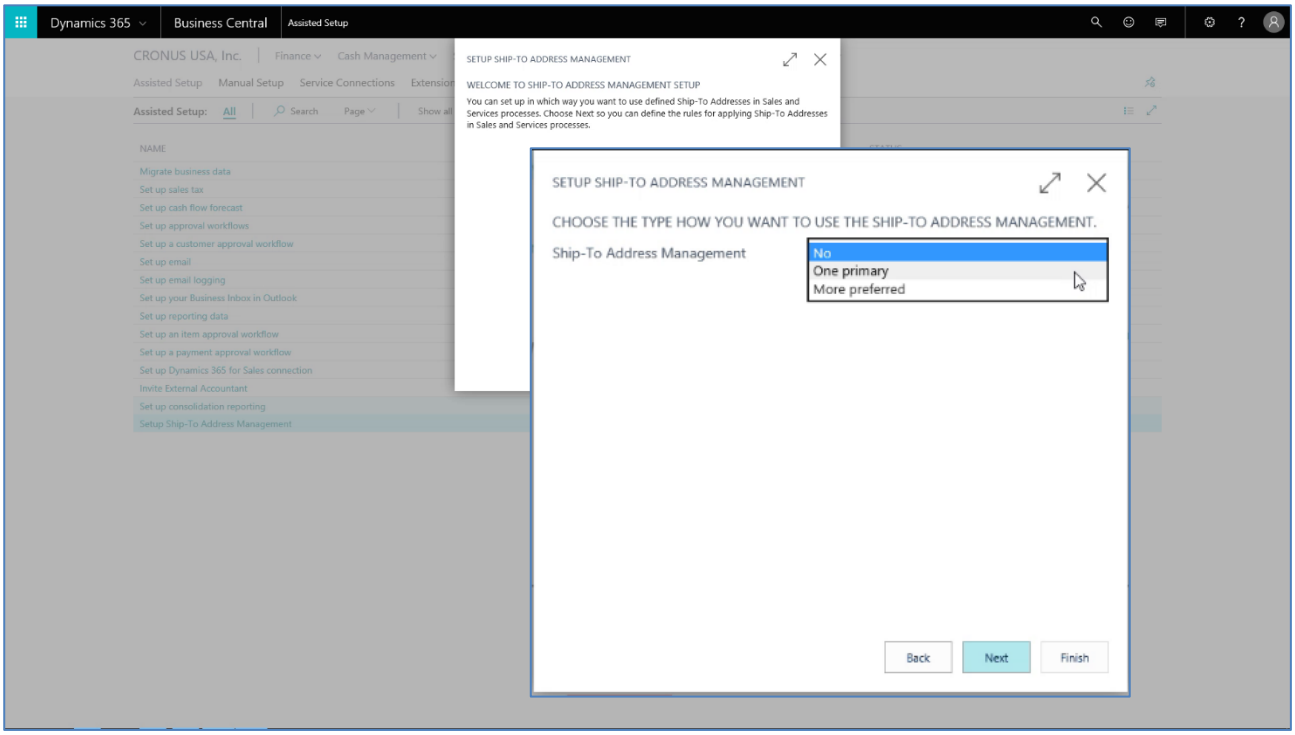
Prerequisites for Usage

To use the Ship-To Address Management you have to license and install the App. In addition, you have to correctly complete the Assisted Setup.

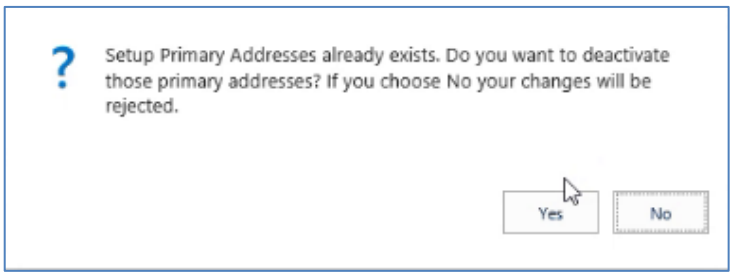
Setup

Assisted Setup

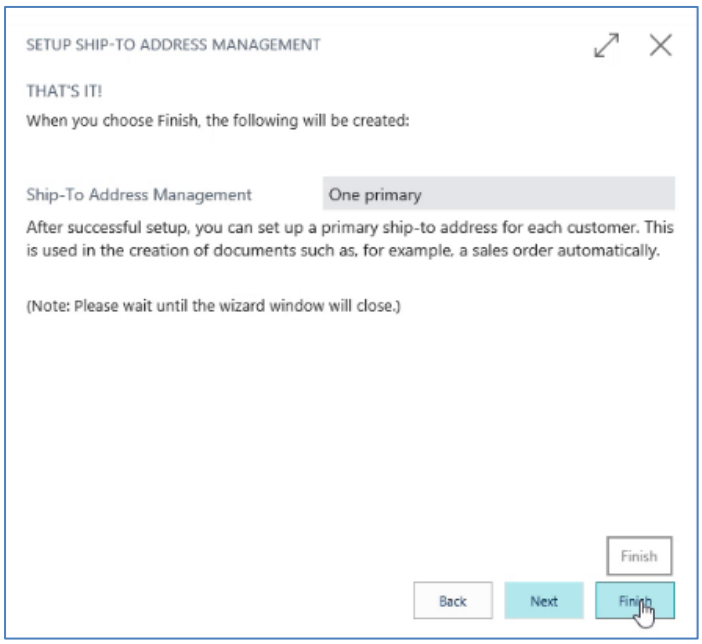
After installing the Extension, you have to setup the Ship-To Address Management in the Assisted Setup. Open the Record “Setup Ship-To Address Management” and complete the wizard.



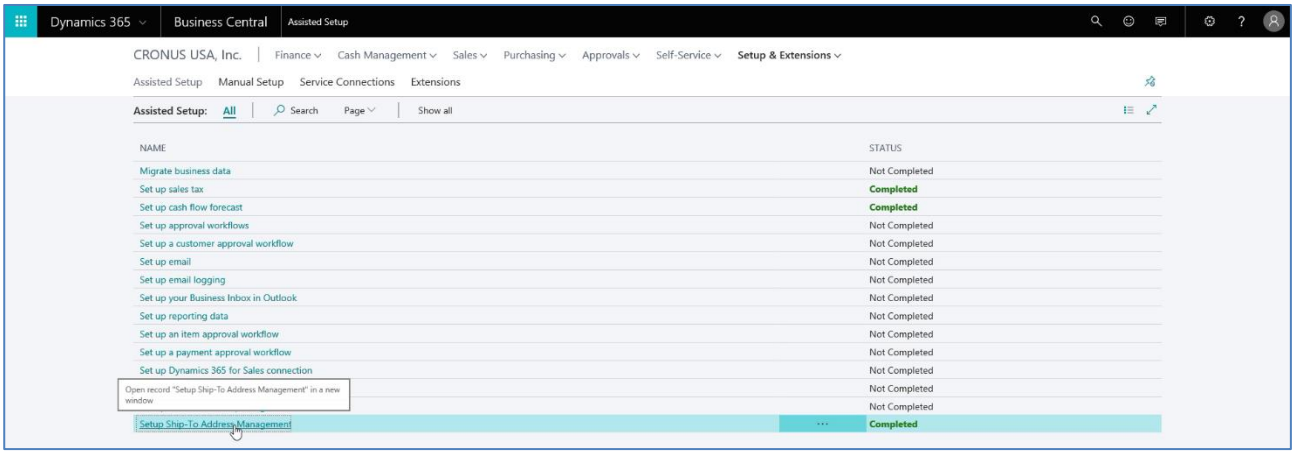
If there are already multiple defined Ship-To Addresses and you want to setup Option “One primary” the following dialog will be displayed.



If the user confirms this dialog the field “Primary Shipping Address“ will be cleared for all Ship-To Addresses. If the confirmation dialog is not confirmed, the Ship-To Adresses and the Setup won’t be changed.

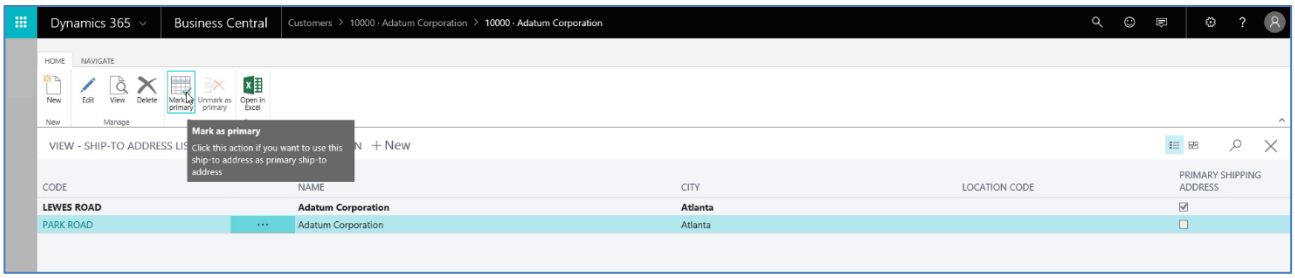


If you choose Finish on the Summary Page, the setup will be applied to the system and the assisted setup is completed.

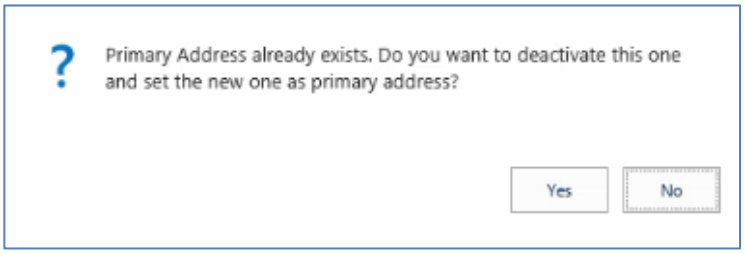


Setup Ship-To Addresses

To setup the data you have to setup the Ship-To Addresses. The Ship-To Address List can be reached through the Customer card in the Tab “Home” under the Customer section. Depending on the Setup, the field “Primary Ship-To Address” or “Preferred Ship-To Address” and the actions “Mark as primary Address” and “Unmark as primary Address” were added to the Ship-To Address List and -Card.
With this field, the Ship-To Addresses are marked as primary or preferred Ship-To Addresses.

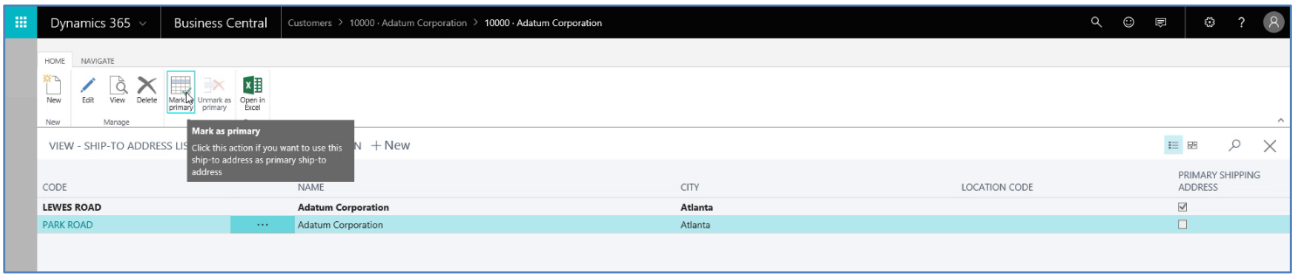


If the primary Ship-To Address is used and the user marks more than one Ship-To Address as primary, there will be displayed a Confirmation Dialog. If the user confirms this dialog the current Ship-To Address will be marked as primary and the mark of other Ship-To Addresses will be removed. If the confirmation dialog is not confirmed, the Ship-To Adresses won’t be changed.

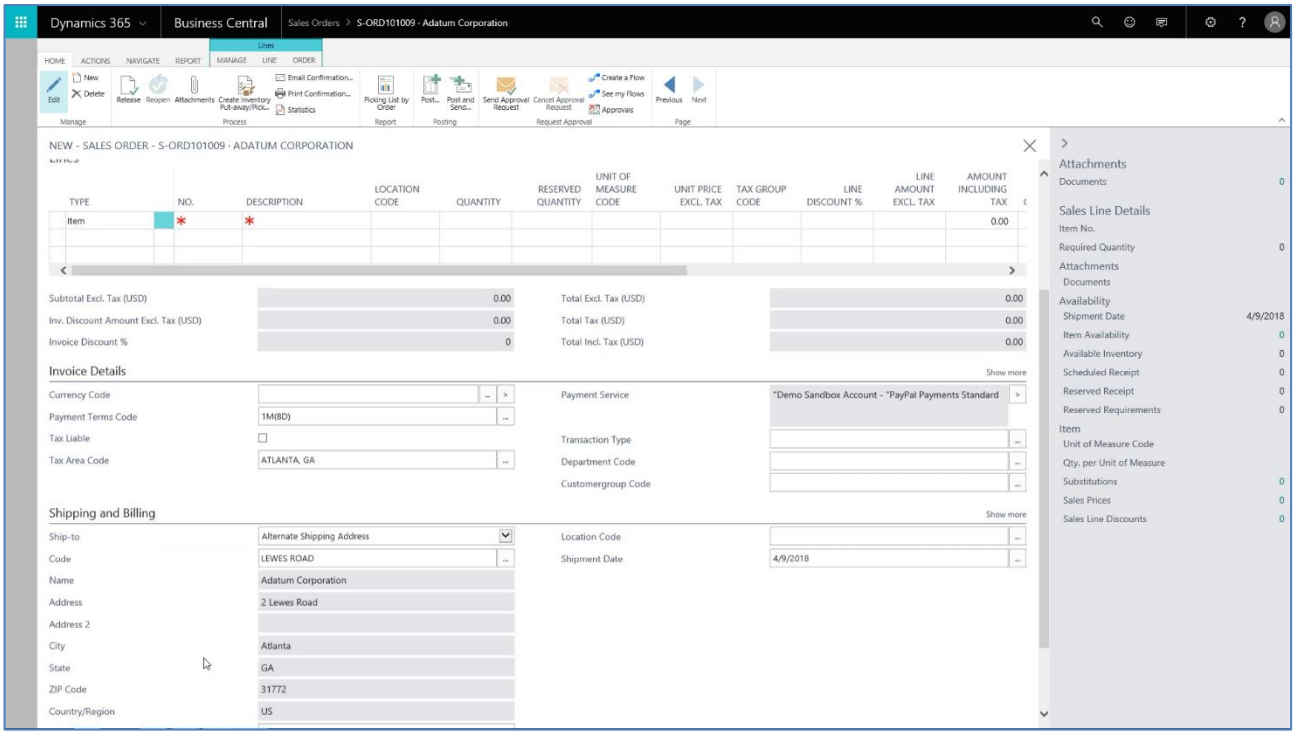


Usage

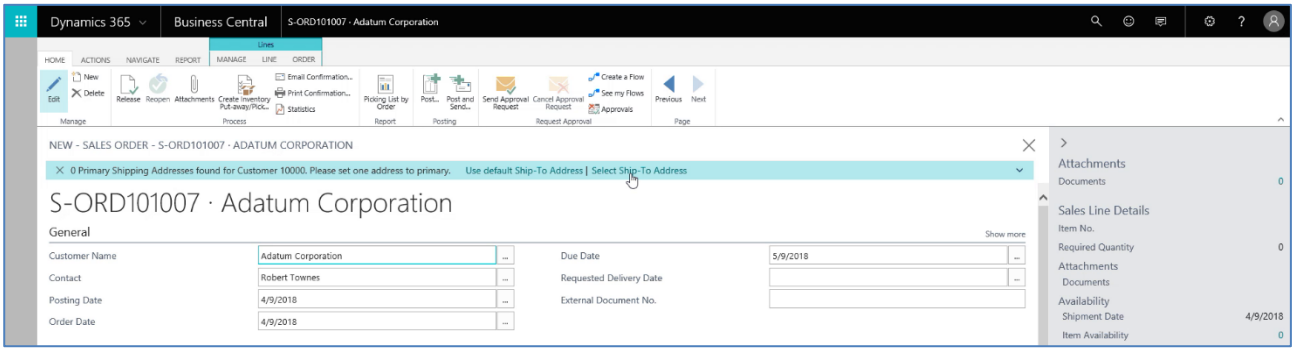
With the Extension, the possibility was created to add one primary or multiple preferred Ship-To Addresses to every customer. In the Ship-To Addresses, they can be marked as primary or preferred, reachable through the “Home” Tab under the Customer section on the Customer Card.



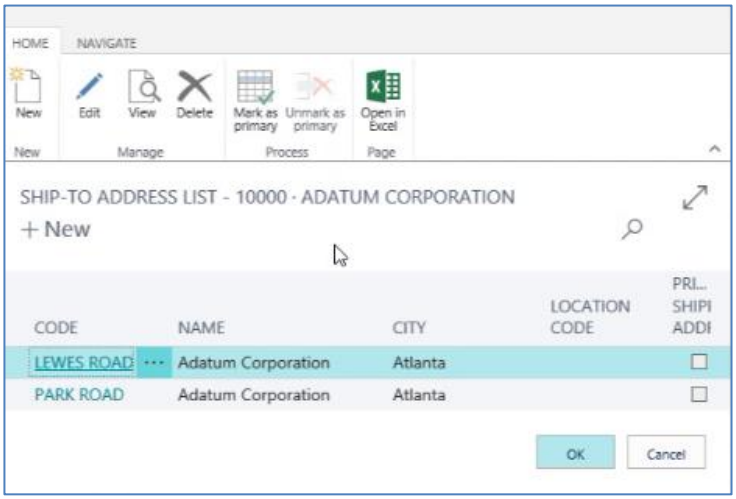
The primary marked Ship-To Address will be applied automatically on every document (e.g. Sales Order), after choosing a customer.



If there is none or multiple Ship-To Addresses marked for a customer as primary or preferred, the user gets a dialog when he creates a document or chooses a customer on a document.



After confirming the dialog, the user can choose a Ship-To Address from the Page “Ship-To Addresses” for this document.

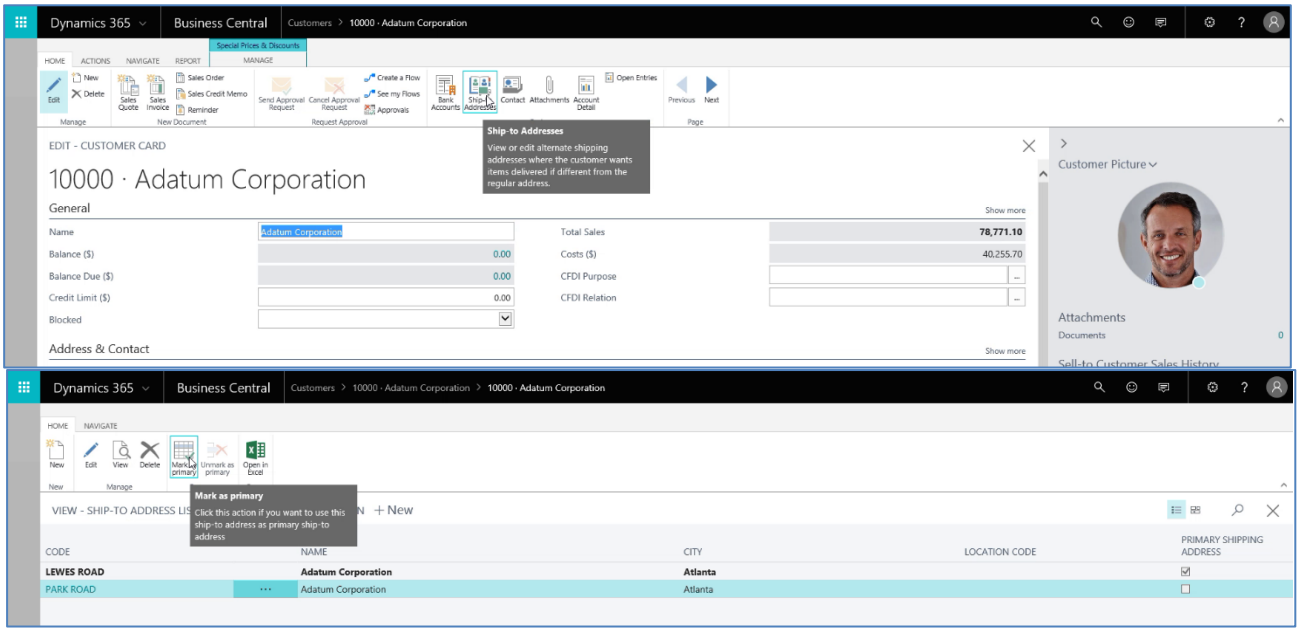


The selected Ship-To Address will be applied to the document.

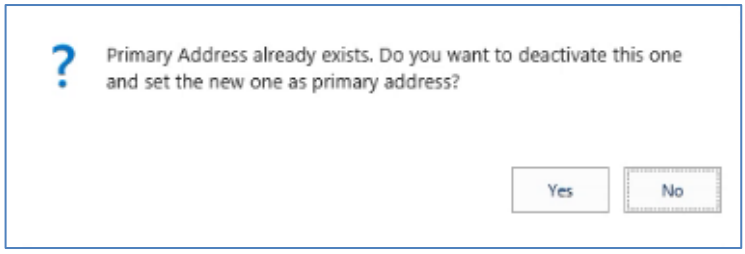
Usage Scenario

Step 1)
Setup primary Ship-To Address

In the tab „Home“ of the Customer Card open the Action „Ship-To Addresses“. Select a Ship-To Address and click the action Edit to mark a Ship-To Address as primary or preferred The Ship-To Address Card opens in Edit-Mode and you can check or uncheck the field „Preferred Ship-To Address“ or „Primary Ship-To Address“.

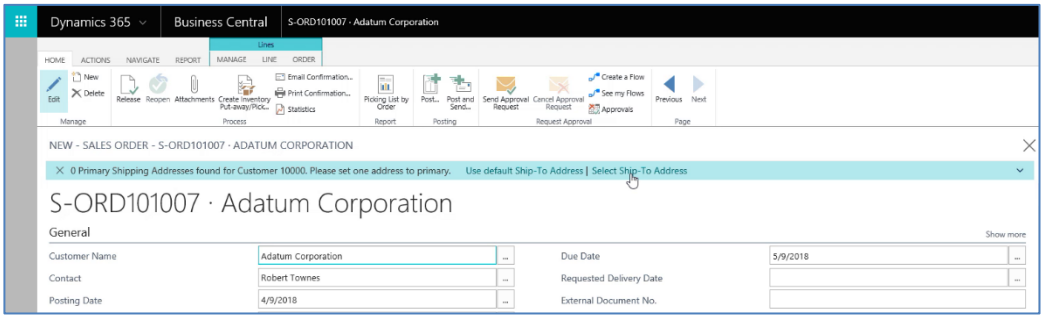


If the Sales & Receivables Setup or the Service Setup was setup with „One primary“ and there is already a Ship-To Address marked as Primary, a warning is displayed. If the warning is not confirmed, no changes will be applied.

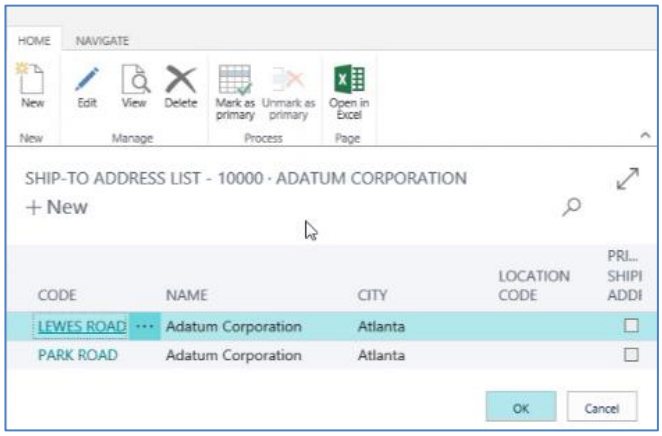


Step 2)
Create a Document

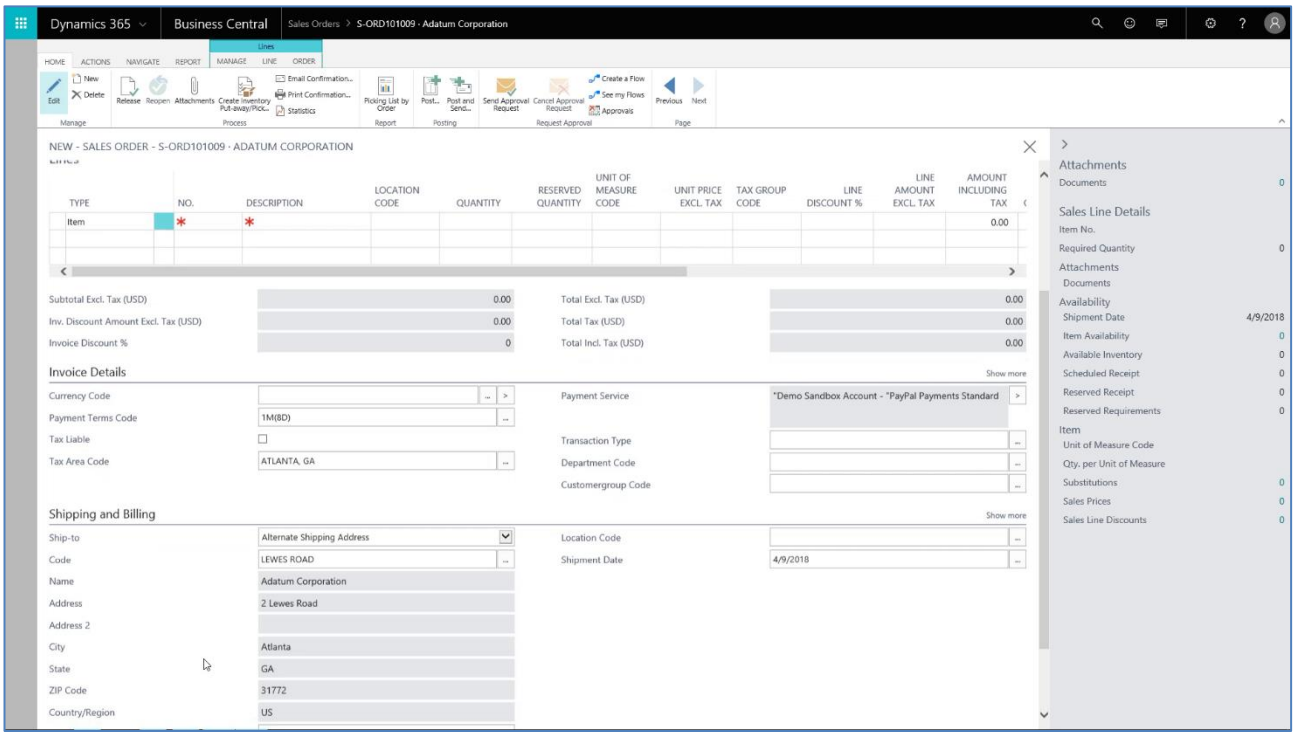
After setting up the Ship-To Addresses, you can create a document.



If there are more than one Ship-To Addresses marked as preferred, a dialog is displayed. Confirm it with ok and choose a Ship-To Address.



If there is only one Ship-To Address marked as preferred or primary, this one is automatically applied to the document. You can find the Ship-To Address in the Fasttab Shipping on the document.


Dynamics 365
Business Central
Sales Orders > S-ORD101009 · Adatum Corporation
NEW - SALES ORDER - S-ORD101009 · ADATUM CORPORATION
TYPE
NO.
DESCRIPTION
LOCATION CODE
QUANTITY
RESERVED QUANTITY
UNIT OF MEASURE CODE
UNIT PRICE EXCL. TAX
TAX GROUP CODE
LINE DISCOUNT %
LINE AMOUNT EXCL. TAX
AMOUNT INCLUDING TAX
Item
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Subtotal Excl. Tax (USD)
0.00
Inv. Discount Amount Excl. Tax (USD)
0.00
Invoice Discount %
0
Total Excl. Tax (USD)
0.00
Total Tax (USD)
0.00
Total Incl. Tax (USD)
0.00
Invoice Details
Show more
Currency Code
Payment Terms Code
1M(8D)
Tax Liable
Tax Area Code
ATLANTA, GA
Payment Service
*Demo Sandbox Account - *PayPal Payments Standard
Transaction Type
Department Code
Customergroup Code
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Attachments
Documents
Availability
Shipment Date
4/9/2018
Item Availability
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Available Inventory
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0
Reserved Receipt
0
Reserved Requirements
0
Item
Unit of Measure Code
Qty. per Unit of Measure
Substitutions
0
Sales Prices
0
Sales Line Discounts
0

Konica Minolta
IT Solutions GmbH
Mittlerer Pfad 1 ◢ 70499 Stuttgart
Tel.: +49 711 1385-0
Fax: +49 711 1385-244
www.konicaminolta.de/it