

# Address Validation Usage Scenario Document for Microsoft Dynamics 365 Business Central

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# 1.Introduction

## Validate (primarily US-American) your ship-to information in open document of SALES/PURCHASE/SERVICE documents

Address Validation tool validates postal addresses from the UPS address book and gives the suggestions of ship-to information based upon below parameter.

- Address
- City,
- Zip (postal code),
- State

## Add-in capabilities

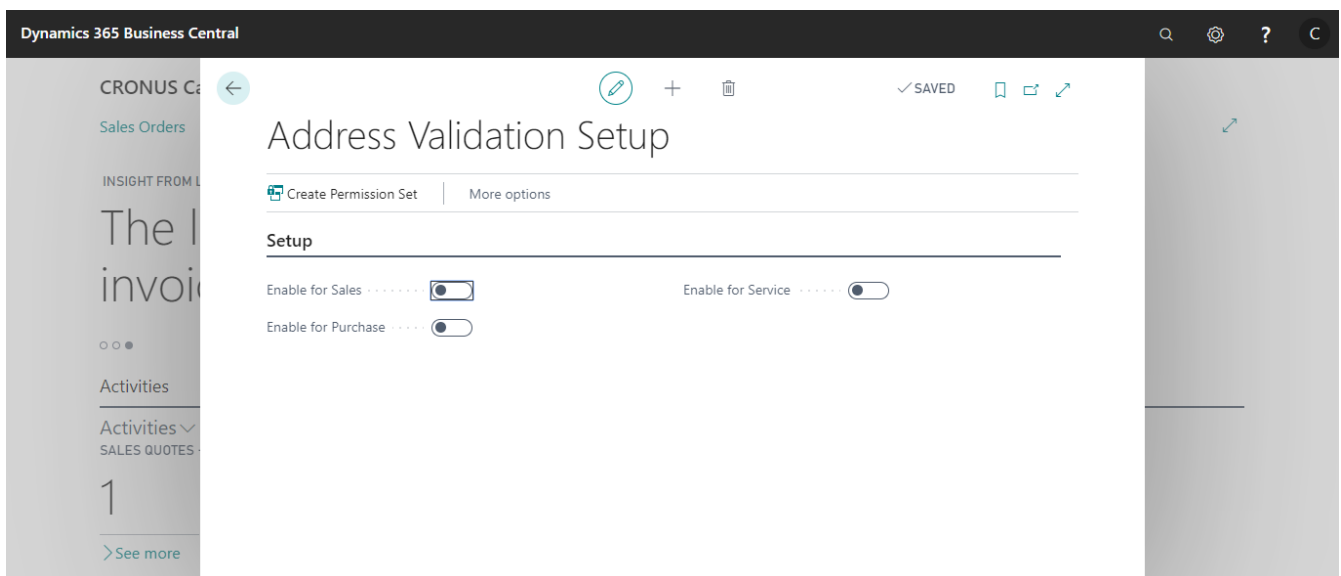
When this add-in is used, it

- Can read the entered Ship-to address from the sales order page and suggest you the matching address which you can opt to update on the document.
- Can verify the address with the real time UPS address book and avoid entering wrong shipping address
- You can enable this functionality for Sales, Purchase and Service transaction and enable this add-in to suggest you the matching address.

# 2.Address Validation Setup

User can easily enable or disable the Address Validation functionality from the Address Validation setup page.

Once user disable the address validation, no address validations action will not work from any of the pages.



1. **Enable for Sales:** Enables the users to use the Address validation app for Sales documents
2. **Enable for Purchase:** Enables the users to use the Address validation app for Purchase documents
3. **Enable for Service:** Enables the users to use the Address validation app for Service documents

## 3.Functionality Test Cases for Address Validation

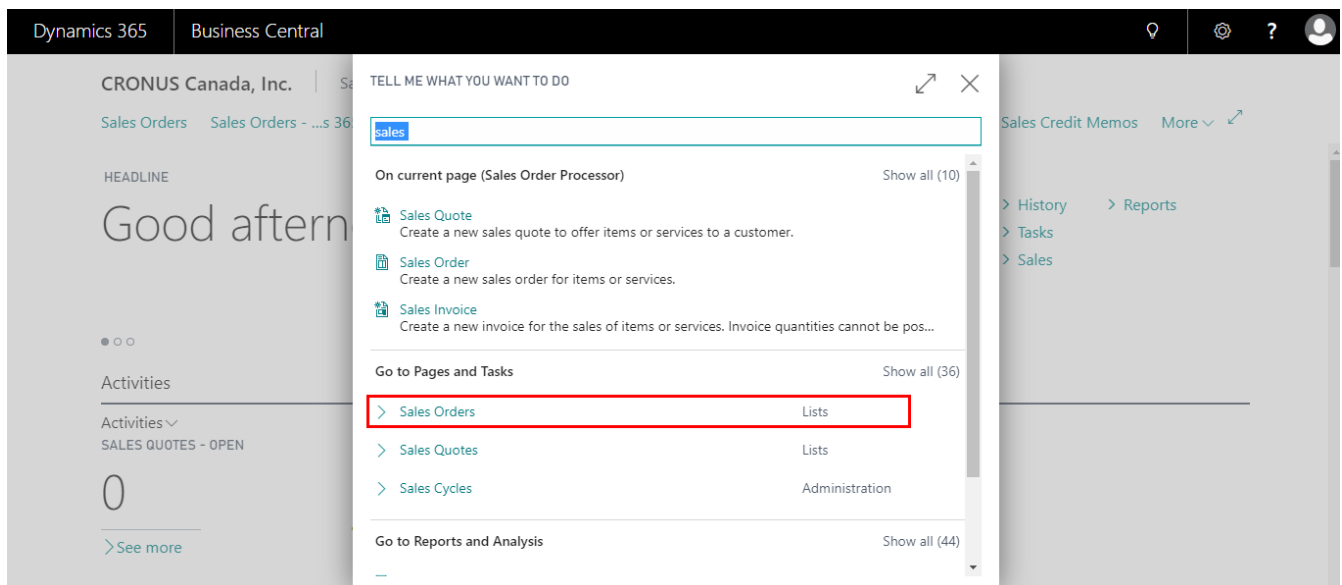
This app covers the sales, Purchase and Service modules.

Below is the use case scenario for sales, purchase and service transaction.

### Sales Order

In the below scenario I am going to demonstrate how to get address suggestions using the “Address Validation app” for Sales order.

Search for the Sales Order list page



Select and open any sales order

The screenshot shows the Dynamics 365 Business Central Sales Orders list page. The table displays a list of sales orders with columns for NO., SELL-TO CUSTOMER NO., SELL-TO CUSTOMER NAME, EXTERNAL DOCUME... NO., LOCATION CODE, ASSIGNED USER ID, and DOCUM DATE. The row for sales order 101018 is highlighted with a red box, indicating the selection of a specific sales order.

| NO.    | SELL-TO CUSTOMER NO. | SELL-TO CUSTOMER NAME      | EXTERNAL DOCUME... NO. | LOCATION CODE | ASSIGNED USER ID | DOCUM DATE |
|--------|----------------------|----------------------------|------------------------|---------------|------------------|------------|
| 101017 | 20000                | Selangorian Ltd.           |                        |               |                  | 1/29/      |
| 101018 | 01454545             | New Concepts Furniture     |                        | YELLOW        |                  | 1/29/      |
| 101019 | 31987987             | Candoxy Nederland BV       |                        | YELLOW        |                  | 1/25/      |
| 101020 | 32789456             | Lovina Contractors         |                        | YELLOW        |                  | 1/29/      |
| 101022 | 38128456             | MEMA Ljubljana d.o.o.      |                        | RED           |                  | 2/7/2      |
| 101023 | 30000                | John Haddock Insurance Co. |                        |               |                  | 2/24/      |
| 104001 | 10000                | The Cannon Group PLC       |                        | BLUE          |                  | 1/20/      |
| 104002 | 20000                | Selangorian Ltd.           |                        |               |                  | 1/20/      |
| 104003 | 30000                | John Haddock Insurance Co. |                        |               |                  | 1/20/      |

Dynamics 365 Business Central Sales Orders > 101018 · New Concepts Furniture

SALES ORDER

101018 · New Concepts Furniture

Release Prepare Documents Order Confirmation Posting Request Approval Show Attached More options

**General** Show more

Customer Name: New Concepts Furniture Due Date: 1/31/2021

Contact: Ms. Tammy L. McDonald Requested Delivery...

Posting Date: 1/29/2021 External Document...

Order Date: 1/29/2021

**Lines** Manage More options

| TYPE | NO.     | DESCRIPTION             | LOCATION CODE | QUANTITY | QTY ASSEMBLY |
|------|---------|-------------------------|---------------|----------|--------------|
| Item | 1980-LS | MOSCOW Swivel Chair red | GRFFM         | 6        | ORI          |

**Attachments** Documents 0

**Sell-to Customer Sales History**

| Ongoing Sales Quotes   | Ongoing Sales Blanket Orders | Ongoing Sales Orders       |
|------------------------|------------------------------|----------------------------|
| 0                      | 0                            | 1                          |
| Ongoing Sales Invoices | Ongoing Sales Return Orders  | Ongoing Sales Credit Memos |
| 0                      | 0                            | 0                          |
| 0                      | 0                            | 0                          |

Navigate to “**Address Validation**” Action in the Action pane (shown in the below screen)

Click on the “**Address Validation**” action under the **Address Validation** action group

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 28-01-2021

101018 · New Concepts Furniture

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Report Fewer options

Functions Address Validation Plan Request Approval Warehouse Posting Print Order Confirmation

Address Validation

Customer No. Due Date: 31-01-2021

Customer Name: New Concepts Furniture Requested Delivery...

SELL-TO Promised Delivery...

Address: 705 West Peachtree Street External Document...

Address 2 Your Reference...

City: Atlanta Salesperson Code: JR

Province/State: GA Campaign No.

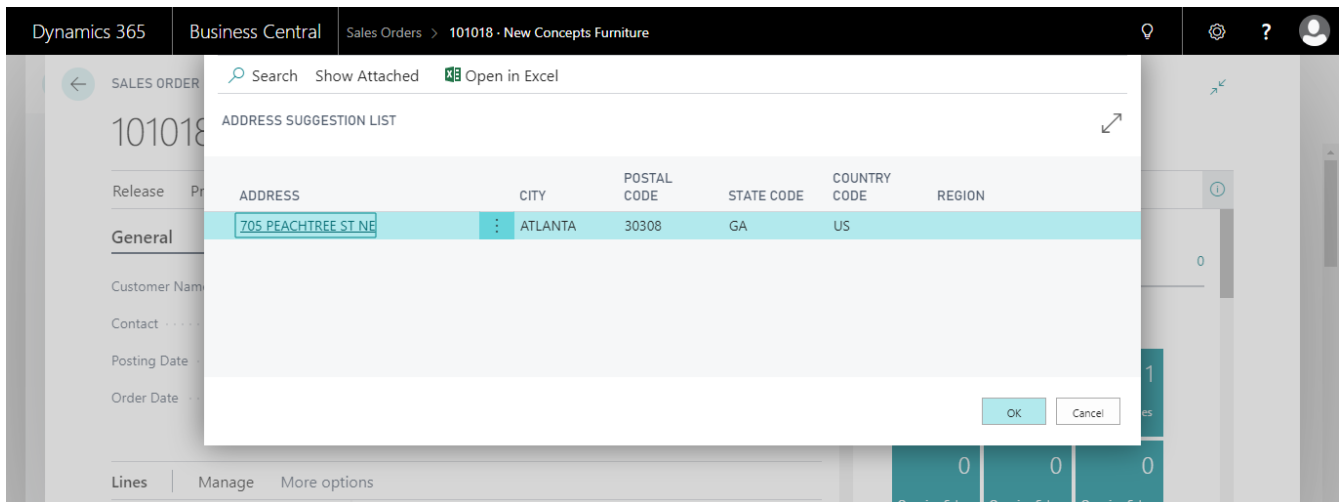
ZIP Code: 31772 Opportunity No.

Country/Region Co... US Responsibility Cent...

**Sell-to Customer Sales History**

| Ongoing Sales Quotes   | Ongoing Sales Blanket Orders | Ongoing Sales Orders         |
|------------------------|------------------------------|------------------------------|
| 0                      | 0                            | 1                            |
| Ongoing Sales Invoices | Ongoing Sales Return Orders  | Ongoing Sales Credit Memos   |
| 0                      | 0                            | 0                            |
| Posted Sales Shipments | Posted Sales Invoices        | Posted Sales Return Receipts |
| 0                      | 0                            | 0                            |

Based on the entered ship to address information If there is any Suggestions found in the UPS address book, it will open the **Address Suggestion List** page as shown below.



User will have choice to select the address from the **Address suggestion list** page and click on the **OK** button

After clicking on the **Ok** button, it will update the ship to address information from the selected address in the **Sales Order** page and if you click on cancel then it will ignore the suggestion and proceed with the entered address

Please see the below screenshots for before and after updating the Ship-to address information

SALES ORDER

## 101018 · New Concepts Furniture

Release Prepare Documents Order Confirmation Posting Request Approval Show Attached Actions Navigate Less options

**Shipping and Billing** Show more

|                |                           |               |                    |
|----------------|---------------------------|---------------|--------------------|
| Ship-to        | Custom Address            | Bill-to       | Default (Customer) |
| Code           |                           | Location Code | YELLOW             |
| Name           | New Concepts Furniture    | Shipment Date | 1/29/2021          |
| Address        | 705 West Peachtree Street |               |                    |
| Address 2      |                           |               |                    |
| City           | Atlanta                   |               |                    |
| Province/State | GA                        |               |                    |
| ZIP Code       | 31772                     |               |                    |
| Country/Region | US                        |               |                    |
| UPS Zone       |                           |               |                    |
| Contact        | Ms. Tammy L. McDonald     |               |                    |

**Before updating ship-to address from suggestion list page**

SALES ORDER

+

101018 · New Concepts Furniture

Release

Prepare

Documents

Order Confirmation

Posting

Request Approval

Show Attached

Actions

Navigate

Less options

Shipping and Billing

Ship-to

Custom Address

Bill-to

Default (Customer)

Code

Location Code

YELLOW

Name

New Concepts Furniture

Shipment Date

1/29/2021

Address

705 PEACHTREE ST NE

Address 2

City

ATLANTA

Province/State

GA

ZIP Code

30308

Country/Region

US

UPS Zone

Contact

Ms. Tammy L. McDonald

After updating suggested address from the suggestion list page

**Note: Same process applies for the Sales Quote, Sales Invoice documents.**

## Purchase Order

In the below scenario I am going to demonstrate how to get address suggestions using the “Address Validation app” for Purchase order.

Search for the Purchase Order list page

Dynamics 365 Business Central

CRONUS Canada, Inc.

Sales Orders Items Customers

HEADLINE

Hi!

Activities

Activities

SALES QUOTES - OPEN

0

See more

TELL ME WHAT YOU WANT TO DO

purchase orders

Go to Pages and Tasks

Show all (6)

Purchase Orders

Lists

Purchase Return Orders

Lists

Blanket Purchase Orders

Lists

Go to Reports and Analysis

Show all (4)

Purchase Order Status

Reports and Analysis

Purchase Order Archives

Archive

Purchase Return Order Archives

Archive

Didn't find what you were looking for? Try exploring

See more

Sales

Reports

History

Select and open any Purchase order

PURCHASE ORDER | WORK DATE: 28-01-2021

106029 · Progressive Home Furnishings

Process Release Posting Order Request Approval Print/Send Navigate Actions Navigate Report Fewer options

Ship-to: Default (Company Address) Pay-to: Default (Vendor)

Name: CRONUS Canada, Inc.  
Address: 220 Yonge St  
Address 2:  
City: Toronto  
Province: Ontario  
ZIP Code: M5E 1G5  
Country/Region: CA  
Contact:  
UPS Zone:

**Details** Attachments (0)

**Vendor Statistics**

|                                 |             |
|---------------------------------|-------------|
| Vendor No.                      | 01254796    |
| Balance (\$)                    | 2,45,699.85 |
| Outstanding Orders (\$)         | 0.00        |
| Amt. Rcd. Not Invd. (\$)        | 0.00        |
| Outstanding Invoices (\$)       | 0.00        |
| Total (\$)                      | 2,45,699.85 |
| Overdue Amounts (\$) as of 2... | 0.00        |
| Invoiced Prepayment Amoun...    | 0.00        |
| Payments (\$)                   | 0.00        |
| Last Payment Date               | -           |

Buy-from Vendor History

Navigate to “Address Validation” Action in the Action pane

Click on the “Address Validation” action under the Address Validation action group

PURCHASE ORDER | WORK DATE: 28-01-2021

106029 · Progressive Home Furnishings

Process Release Posting Order Request Approval Print/Send Navigate Actions Navigate Report Fewer options

Functions Address Validation Request Approval Warehouse Posting Print

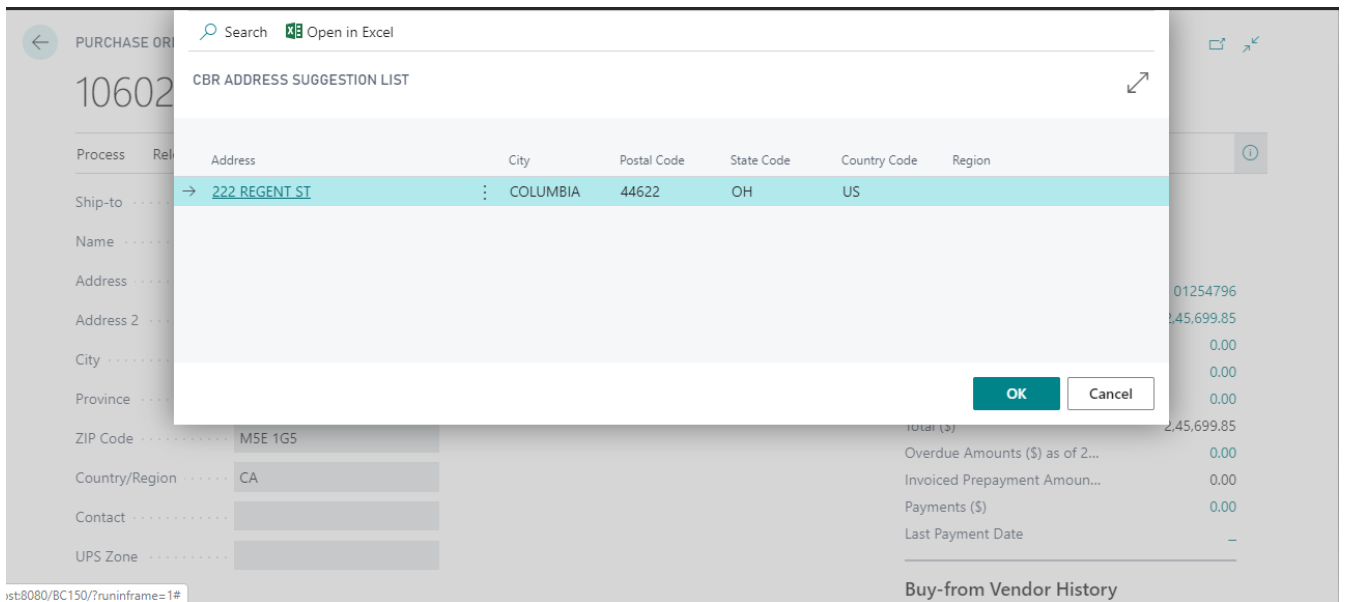
Name: Address Validation  
Address: 220 Yonge St  
Address 2:  
City: Toronto  
Province: Ontario  
ZIP Code: M5E 1G5  
Country/Region: CA  
Contact:  
UPS Zone:

**Vendor Statistics**

|                                 |             |
|---------------------------------|-------------|
| Vendor No.                      | 01254796    |
| Balance (\$)                    | 2,45,699.85 |
| Outstanding Orders (\$)         | 0.00        |
| Amt. Rcd. Not Invd. (\$)        | 0.00        |
| Outstanding Invoices (\$)       | 0.00        |
| Total (\$)                      | 2,45,699.85 |
| Overdue Amounts (\$) as of 2... | 0.00        |
| Invoiced Prepayment Amoun...    | 0.00        |
| Payments (\$)                   | 0.00        |
| Last Payment Date               | -           |

Buy-from Vendor History

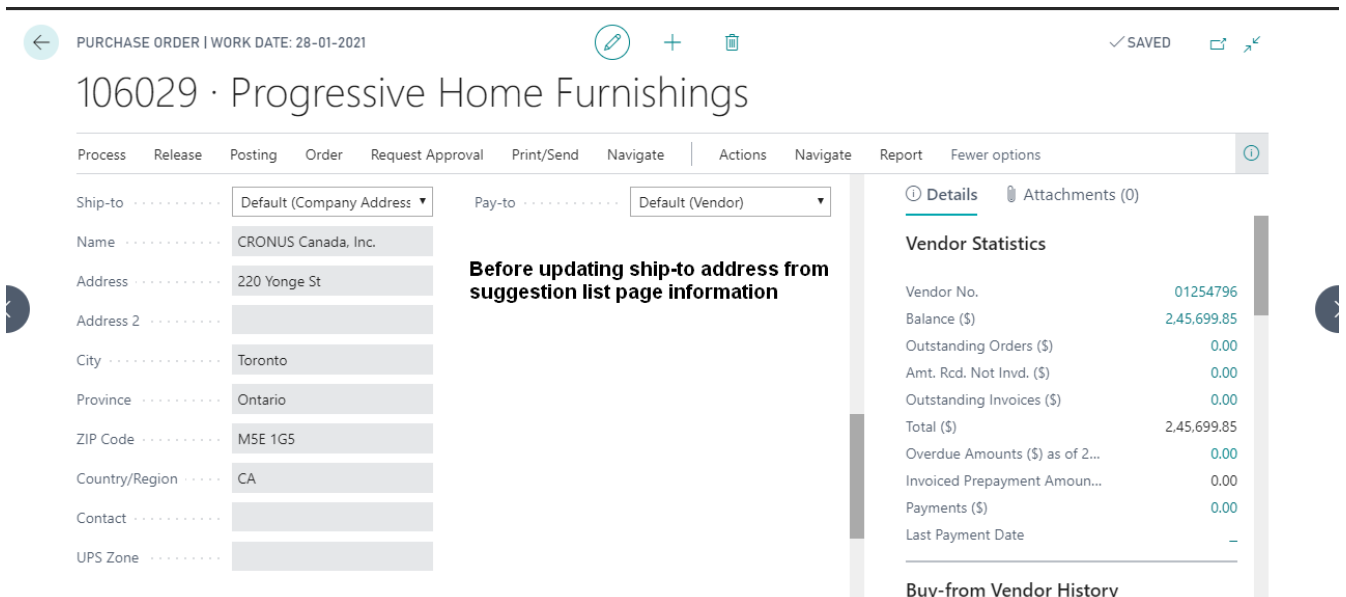
Based on the entered ship to address information If there is any Suggestions found in the UPS address book, it will open the **Address Suggestion List** page as shown below.



User will have choice to select the address from the **Address suggestion list** page and click on the **OK** button

After clicking on the **Ok** button, it will update the ship to address information from the selected address in the **Purchase Order** page and if you click on cancel then it will ignore the suggestion and proceed with the entered address

Please see the below screenshots for before and after updating the Ship-to address information



← PURCHASE ORDER | WORK DATE: 28-01-2021 ✎ + 🗑 ✓ SAVED 📄 ↗

## 106029 · Progressive Home Furnishings

Process Release Posting Order Request Approval Print/Send Navigate Actions Navigate Report Fewer options ⓘ

Ship-to ..... Custom Address ▾ Pay-to ..... Default (Vendor) ▾  
Name ..... CRONUS Canada, Inc.  
Address ..... 222 REGENT ST  
Address 2 .....  
City ..... COLUMBIA ...  
Province ..... OH  
ZIP Code ..... 44622 ...  
Country/Region ..... CA ▾  
Contact .....  
UPS Zone .....

**After updating ship-to address from suggestion list page information**

① Details ② Attachments (0)

### Vendor Statistics

|                                 |             |
|---------------------------------|-------------|
| Vendor No.                      | 01254796    |
| Balance (\$)                    | 2,45,699.85 |
| Outstanding Orders (\$)         | 0.00        |
| Amt. Rcd. Not Invd. (\$)        | 0.00        |
| Outstanding Invoices (\$)       | 0.00        |
| Total (\$)                      | 2,45,699.85 |
| Overdue Amounts (\$) as of 2... | 0.00        |
| Invoiced Prepayment Amoun...    | 0.00        |
| Payments (\$)                   | 0.00        |
| Last Payment Date               | —           |

### Buy-from Vendor History

**Note: Same process applies for the Purchase Quote, Purchase Invoice documents.**

## Service Order

In the below scenario I am going to demonstrate how to get address suggestions using the “Address Validation app” for Service order.

Search for the Service Order list page

Dynamics 365 Business Central

CRONUS Canada, Inc. | Sales Orders Items Customers

INSIGHT FROM LAST MONTH

The biggest was for kr 12

Activities

Activities ▾

SALES QUOTES - OPEN

0

> See more

20

> See more

TELL ME WHAT YOU WANT TO DO

service orders

Go to Pages and Tasks

> Service Orders Lists

> Create Contract Service Orders Tasks

> Delete Invoiced Service Orders Tasks

Go to Reports and Analysis

Service Profit (Serv. Orders) Reports and Analysis

Service Order - Response Time Reports and Analysis

Didn't find what you were looking for? Try exploring

> Sales

> Reports

> History

Select and open any Service order

Dynamics 365 Business Central

SERVICE ORDER | WORK DATE: 28-01-2021

SO000009 · Progressive Home Furnishings

Process Warehouse Print/Send Release Posting Order Navigate More options

Ship-to Code SHIP-T0

Name Progressive Home Furnishings

Address 3000 Roosevelt Blvd.

City Chicago

Province/State IL

ZIP Code 61236

Country/Region US

Contact Mr. Scott Mitchell

Ship-to Phone

Ship-to Email

Location Code YELLOW

Shipping Advice Partial

Shipment Method Code

Shipping Agent Code

Shipping Agent Service Code

Shipping Time

✓ SAVED

Navigate to **“Address Validation”** Action in the Action pane

Click on the **“Address Validation”** action under the **Address Validation** action group

Dynamics 365 Business Central

SERVICE ORDER | WORK DATE: 28-01-2021

SO000009 · Progressive Home Furnishings

Process Warehouse Print/Send Release Posting Order Navigate Actions Navigate Fewer options

Functions Address Validation Warehouse Posting Print...

SHIP-T0

Name Progressive Home Furnishings

Address 3000 Roosevelt Blvd.

City Chicago

Province/State IL

ZIP Code 61236

Country/Region US

Contact Mr. Scott Mitchell

Ship-to Email

Location Code YELLOW

Shipping Advice Partial

Shipment Method Code

Shipping Agent Code

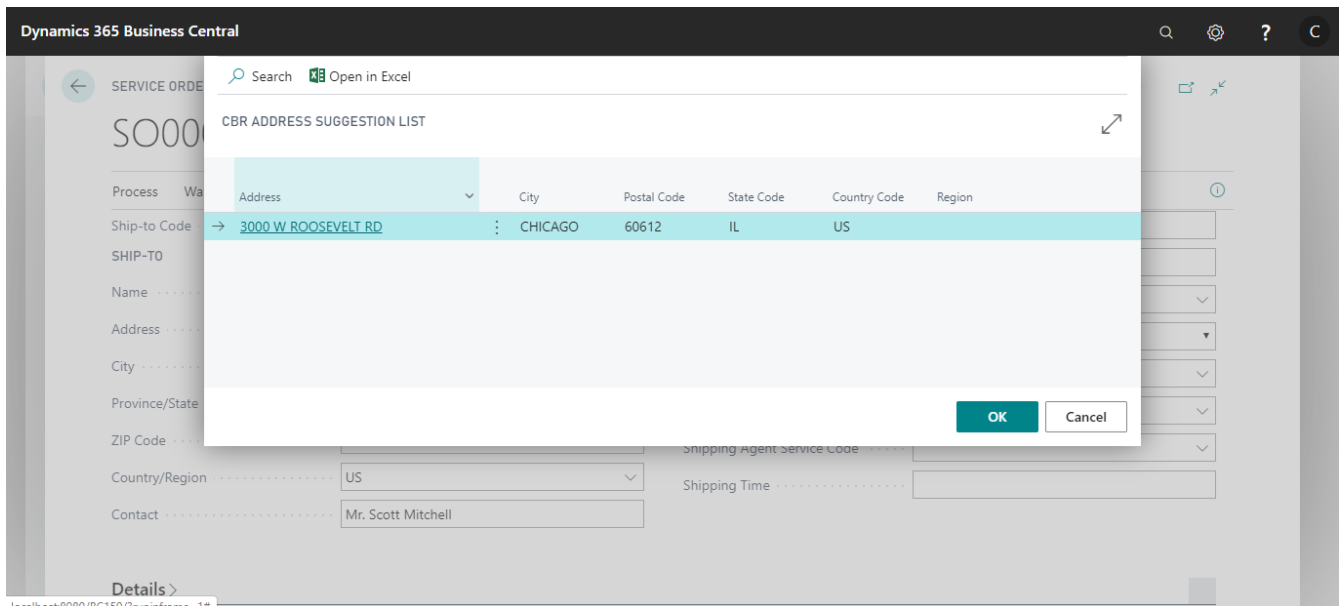
Shipping Agent Service Code

Shipping Time

✓ SAVED

Details >

Based on the entered ship to address information If there is any Suggestions found in the UPS address book, it will open the **Address Suggestion List** page as shown below.

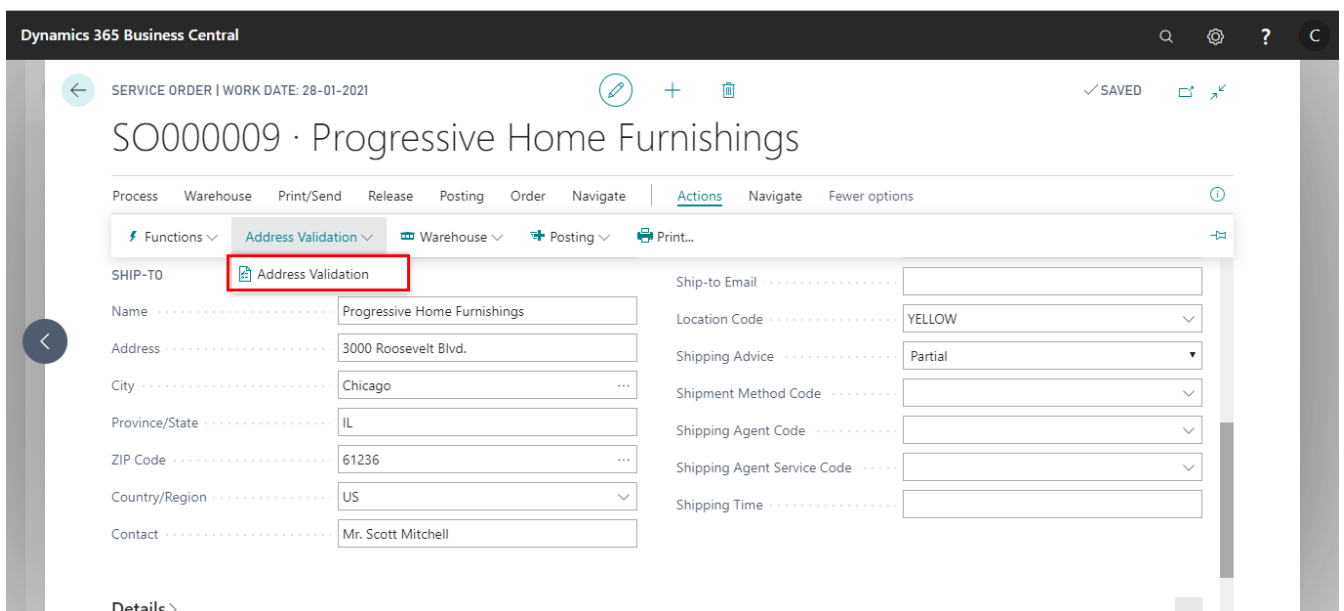


User will have choice to select the address from the **Address suggestion list** page and click on the **OK** button

After clicking on the **Ok** button, it will update the ship to address information from the selected address in the **Service Order** page and if you click on cancel then it will ignore the suggestion and proceed with the entered address.

Please see the below screenshots for before and after updating the Ship-to address information

Before updating ship-to address from suggestion list page information



After updating ship-to address from suggestion list page information

Dynamics 365 Business Central

SERVICE ORDER | WORK DATE: 28-01-2021

✓ SAVED

## SO000009 · Progressive Home Furnishings

Process Warehouse Print/Send Release Posting Order Navigate Actions Navigate Fewer options

|                |                              |                             |         |
|----------------|------------------------------|-----------------------------|---------|
| Ship-to Code   |                              | Ship-to Phone               |         |
| SHIP-T0        |                              | Ship-to Email               |         |
| Name           | Progressive Home Furnishings | Location Code               | YELLOW  |
| Address        | 3000 W ROOSEVELT RD          | Shipping Advice             | Partial |
| City           | CHICAGO                      | Shipment Method Code        |         |
| Province/State | IL                           | Shipping Agent Code         |         |
| ZIP Code       | 60612                        | Shipping Agent Service Code |         |
| Country/Region | US                           | Shipping Time               |         |
| Contact        | Mr. Scott Mitchell           |                             |         |

Details >

**Note: Same process applies for the Service Quote, Service Invoice documents.**