



# Default Ship-To Address for Dynamics 365 Business Central

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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

Dynamics 365 Business Central Customers > 10000 · The Cannon Group PLC

CUSTOMER CARD

10000 · The Cannon Group PLC

New Document Request Approval Customer Show Attached More options

Invoicing > DOMESTIC DOMESTIC

Payments > 1M(8D)

Shipping Show more

Location Code BLUE SHIPMENT METHOD Code EXW

Combine Shipments Reserve Optional Base Calendar Code Customized Calen... No

Shipping Advice Partial Default Ship-To Ad...

Customer Picture

Attachments Documents 0

Sell-to Customer Sales History

0 0 4

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

Dynamics 365 Business Central Customers > 10000 · The Cannon Group PLC

CUSTOMER CARD

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Shipping Advice Partial Default Ship-To Ad...

Customer Picture

Attachments Documents 0

Sell-to Customer Sales History

0 0 4

| CODE      | NAME                 | CITY       |
|-----------|----------------------|------------|
| DUDLEY    | The Cannon Group PLC | Dudley     |
| PARK ROAD | The Cannon Group PLC | Birmingham |

+ New Select from full list

- 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.

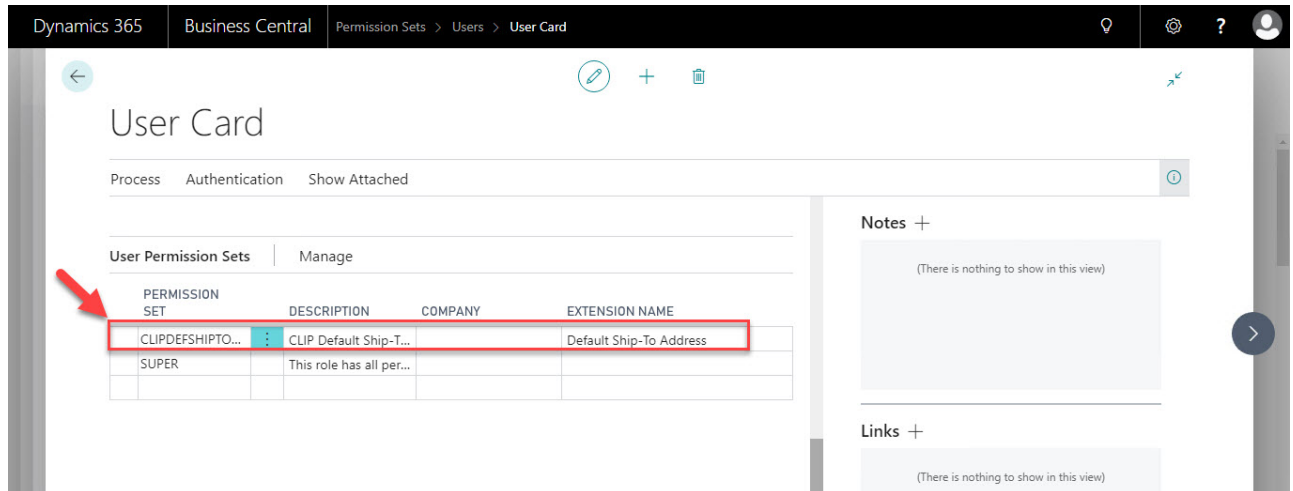
| PERMISSION SET   | NAME                       | TYPE      | EXTENSION NAME                     |
|------------------|----------------------------|-----------|------------------------------------|
| CLIPDEFSHIPTO... | CLIP Default Ship-To A...  | Extension | Default Ship-To Address            |
| ESSENTIALBUSI... | 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 Serv...     | 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    |                                    |

| OBJECT TYPE                             | OBJECT ID | OBJECT NAME |
|---|-----------|-------------|
| (There is nothing to show in this view) |           |             |

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



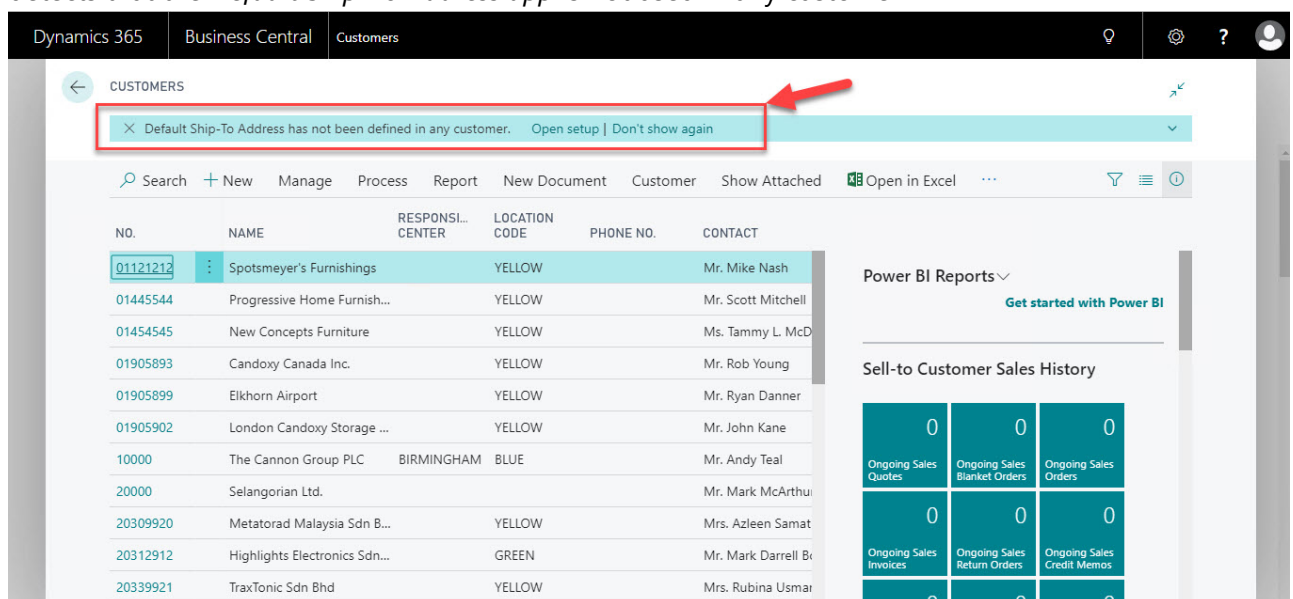
## Configuring existing customers

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

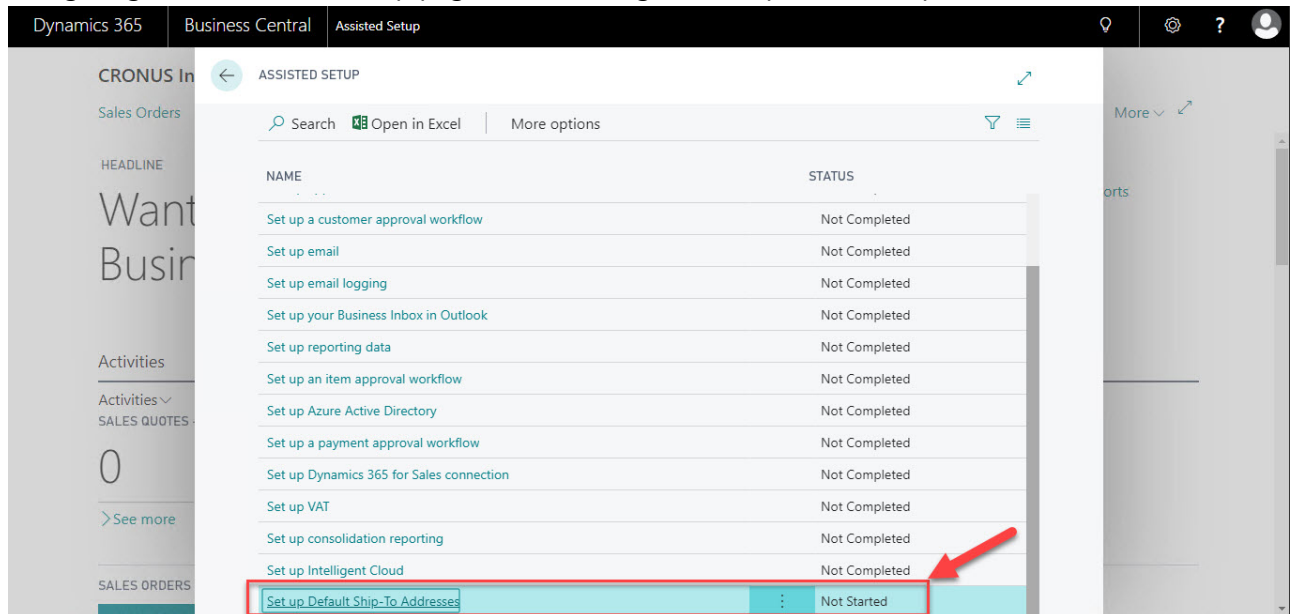
However, the **Default Ship-To Address app** provides an easy way of configuring all existing customers when installing the app. This quick configuration is done through an Assisted Setup.

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

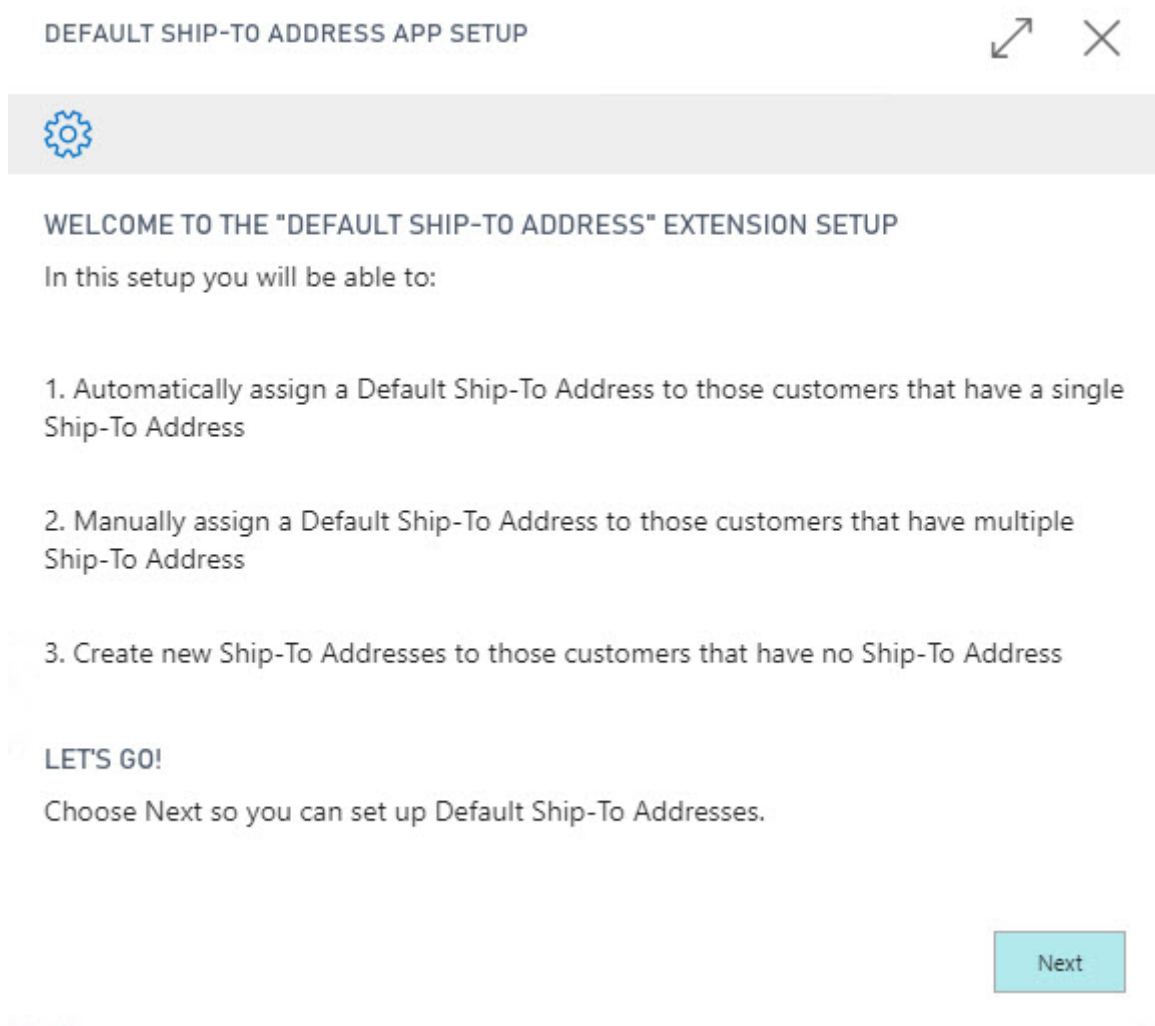


## 2. Navigating to the Assisted Setup page and selecting the *Set up Default Ship-To Addresses*



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<br>SHIP-TO<br>ADDRESS | NO. OF<br>SHIP-TO<br>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.

- 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.



## Version 2.0.0.0 - November 2019

- Fix to make the App compatible with Dynamics 365 Business Central release wave 2