

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

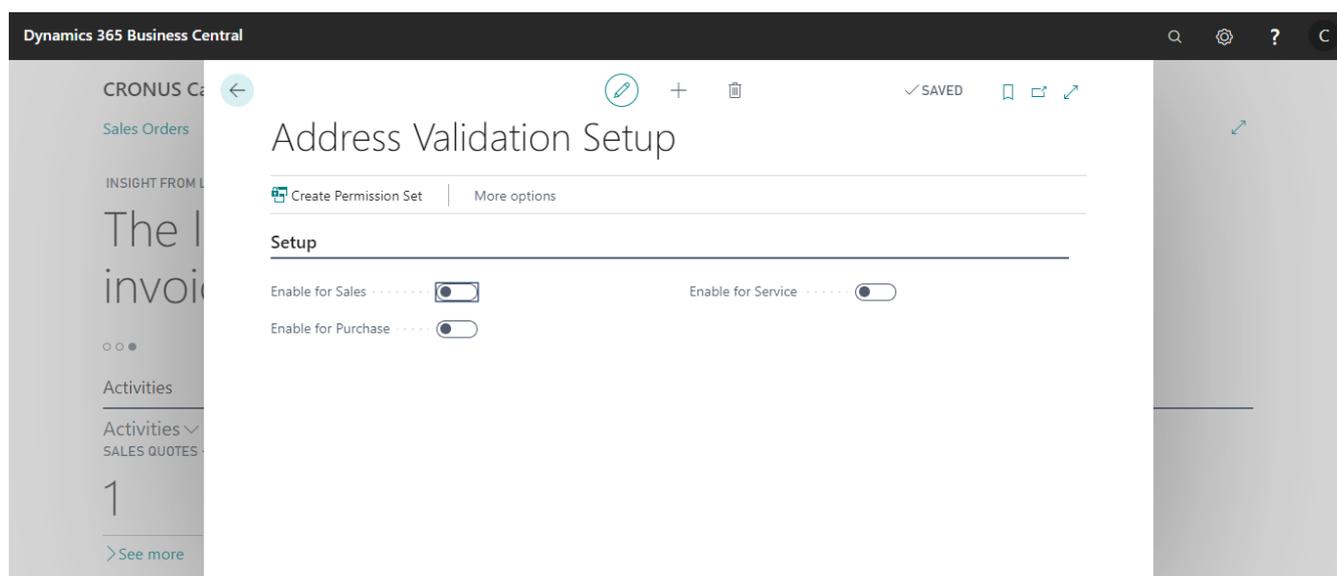
When this add-in is used, it

- 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

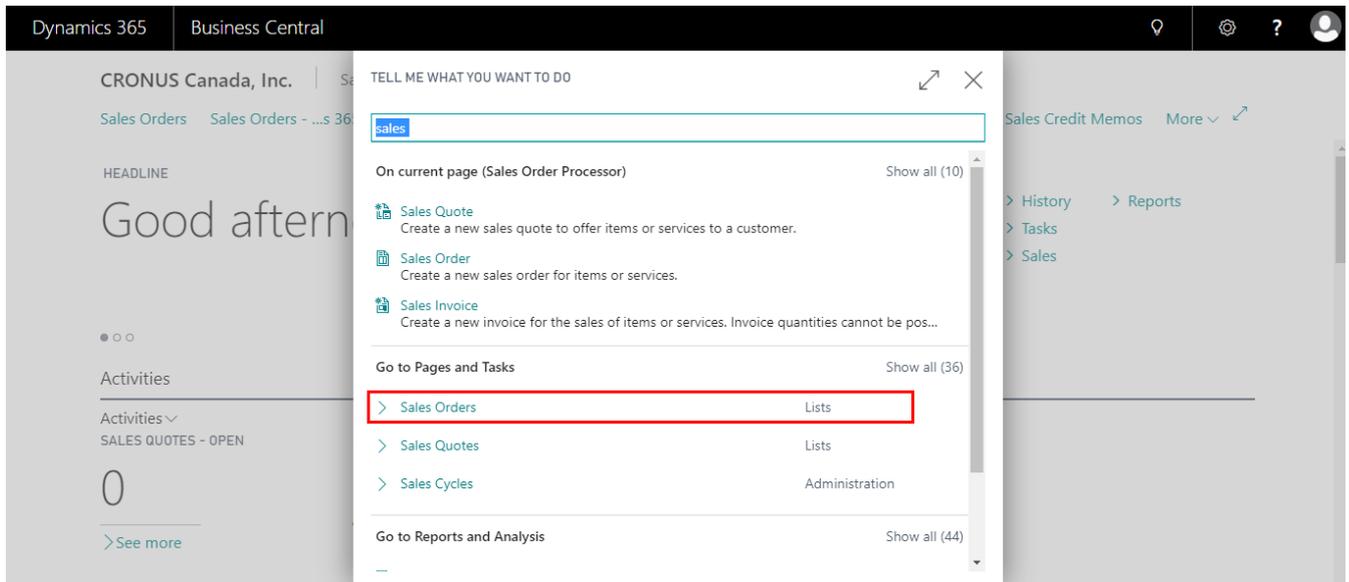
This app covers the sales, Purchase and Service modules.

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

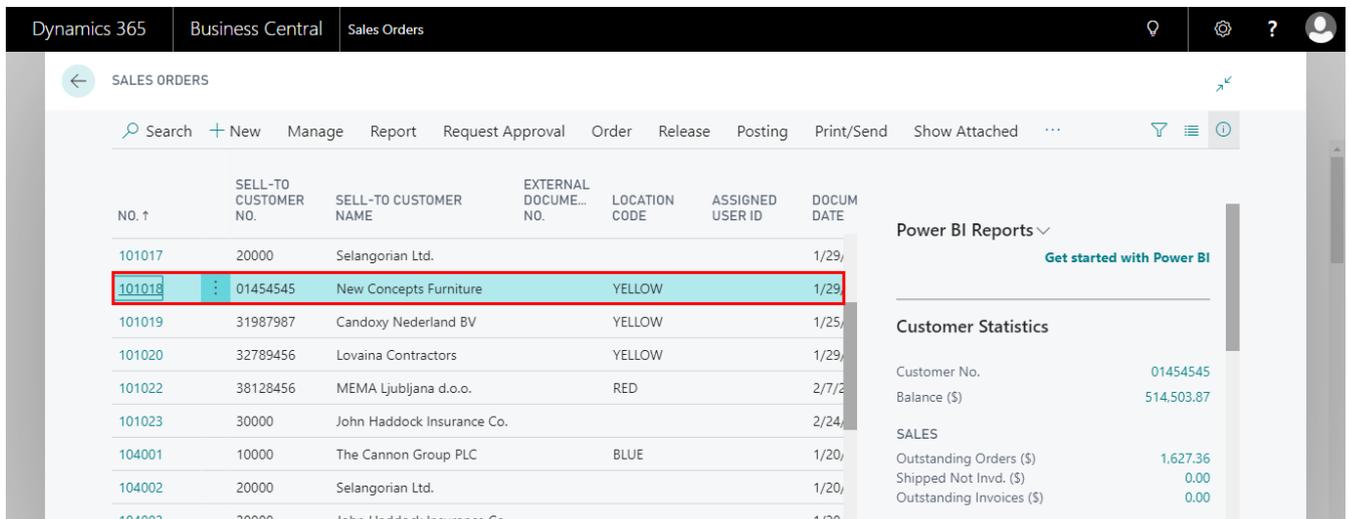
Sales Order

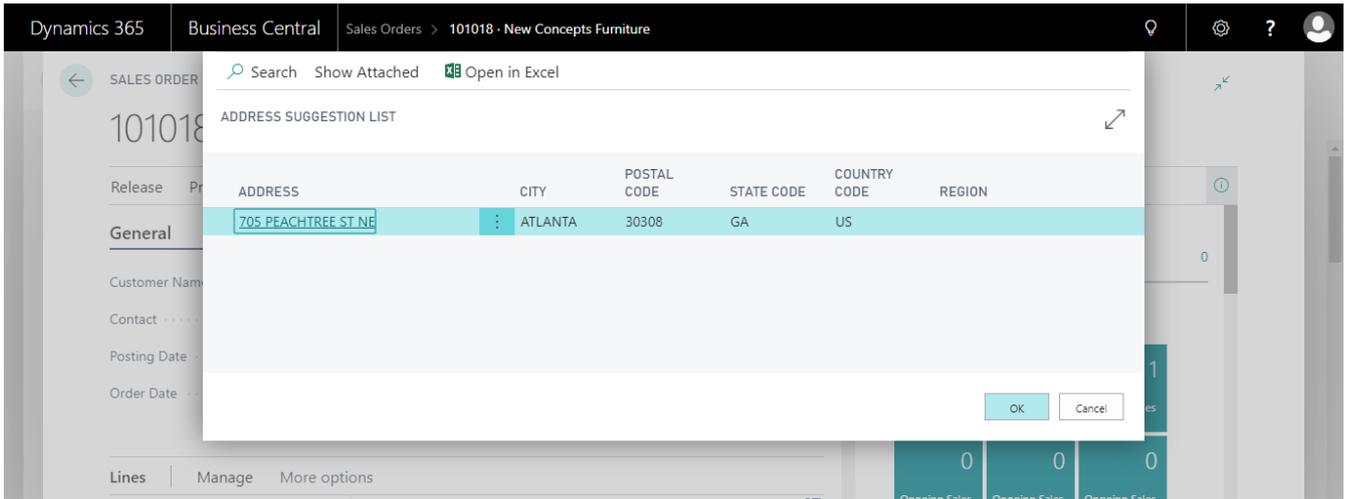
In the below scenario I am going to demonstrate how to get address suggestions using the “Address Validation app” for Sales order.

Search for the Sales Order list page



Select and open any sales order

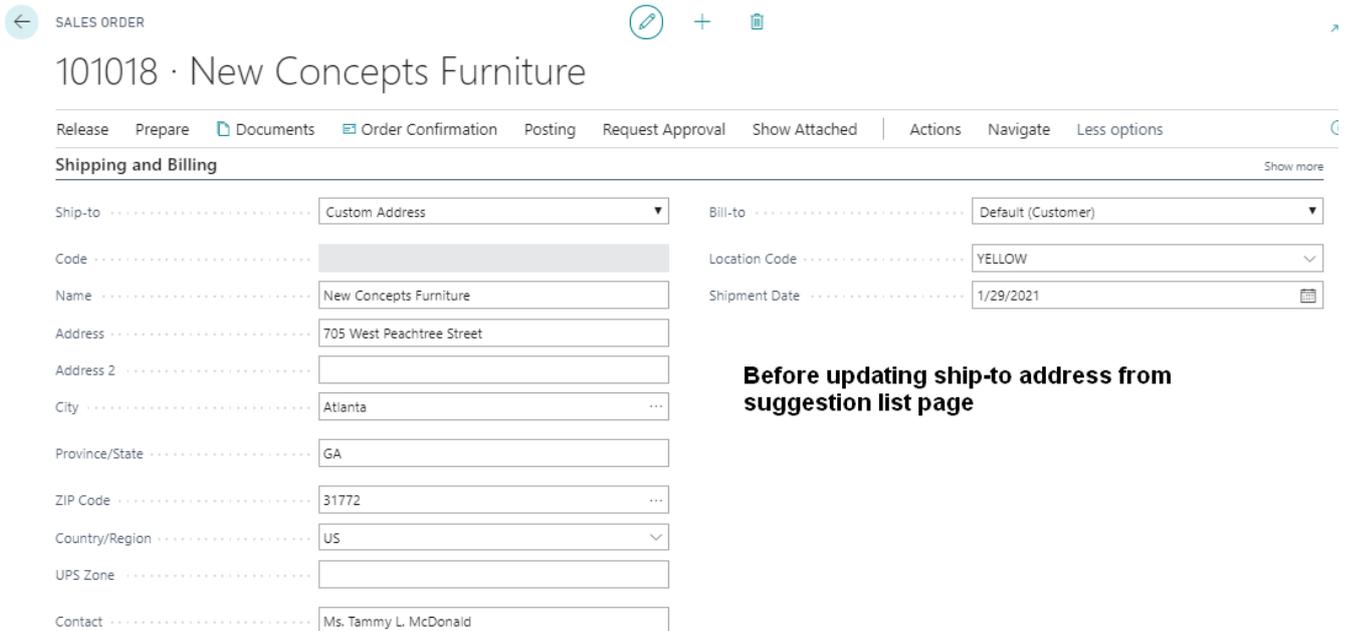




User will have choice to select the address from the **Address suggestion list** page and click on the **OK** button

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 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

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: MSE 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

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

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

Functions Address Validation Request Approval Warehouse Posting Print

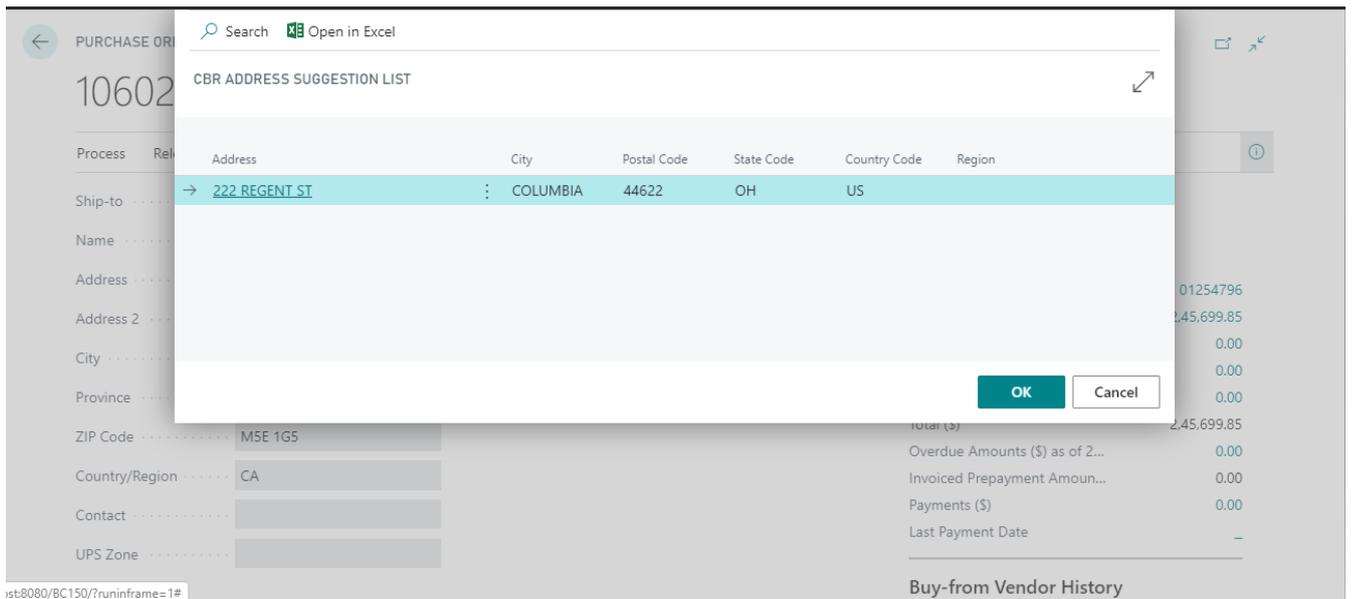
Name: Address Validation
Address: 220 Yonge St
Address 2:
City: Toronto
Province: Ontario
ZIP Code: MSE 1G5
Country/Region: CA
Contact:
UPS Zone:

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

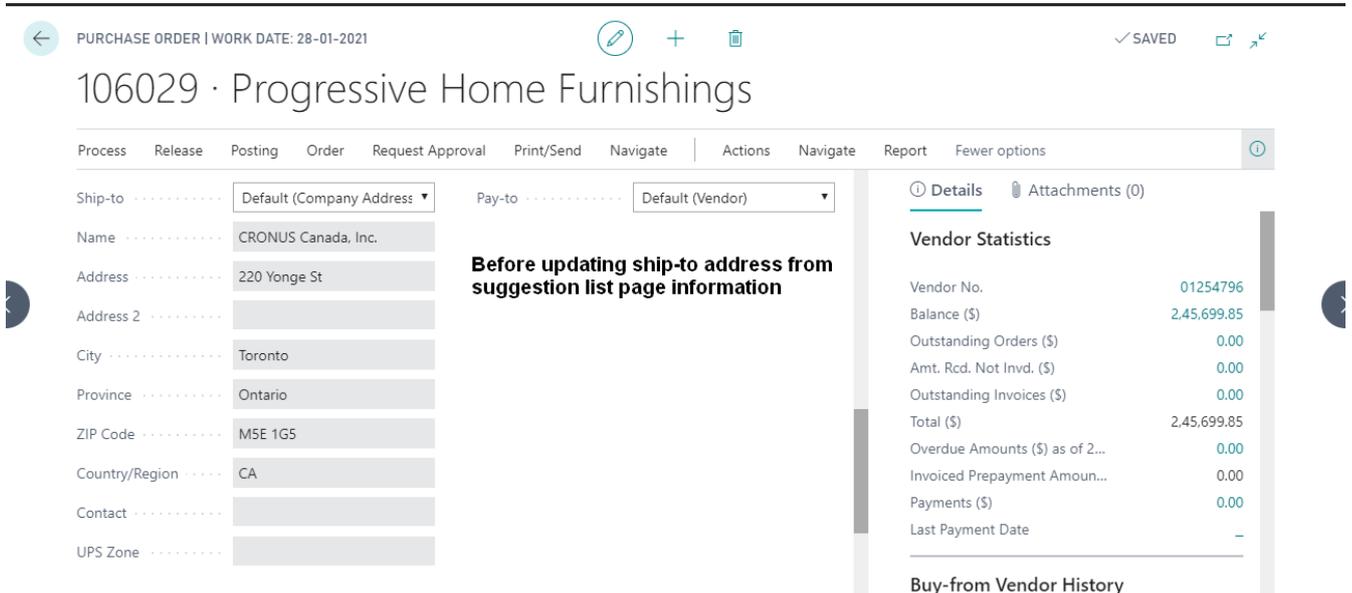
Based on the entered ship to address information If there is any Suggestions found in the UPS address book, it will open the **Address Suggestion List** page as shown below.



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

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

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

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 Show all (5)

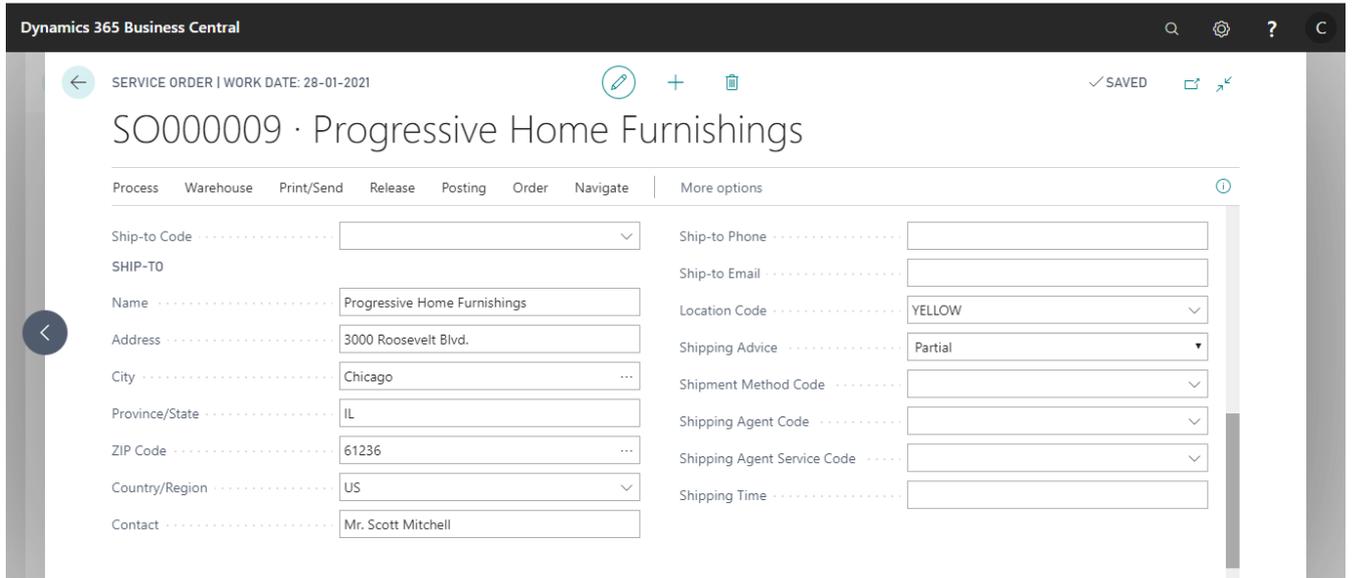
- > Service Orders Lists
- > Create Contract Service Orders Tasks
- > Delete Invoiced Service Orders Tasks

Go to Reports and Analysis

- Service Profit (Serv. Orders) Reports and Analysis
- Service Order - Response Time Reports and Analysis

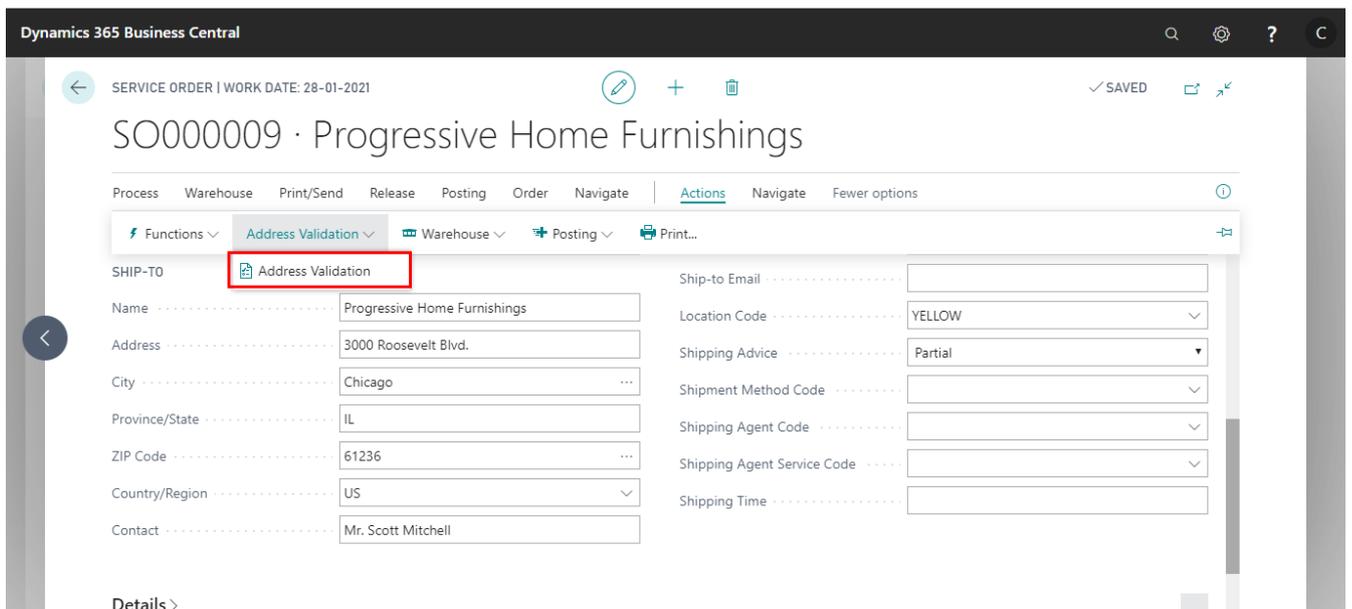
Didn't find what you were looking for? Try exploring

Select and open any Service order

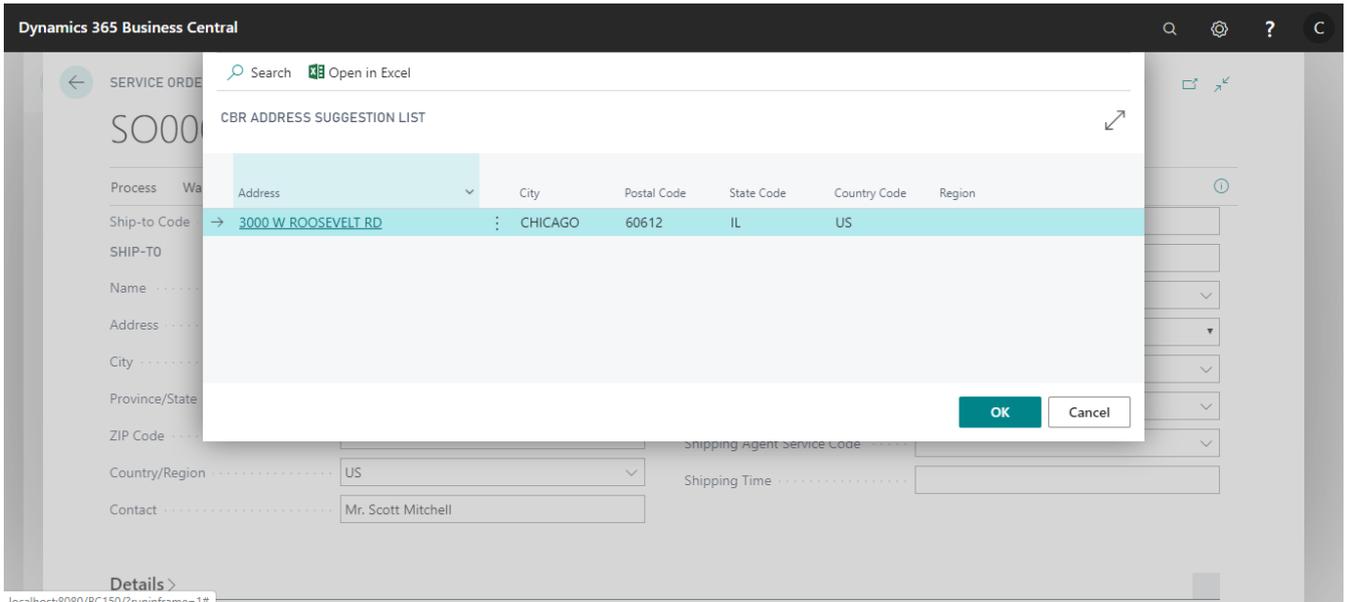


Navigate to **“Address Validation”** Action in the Action pane

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



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.

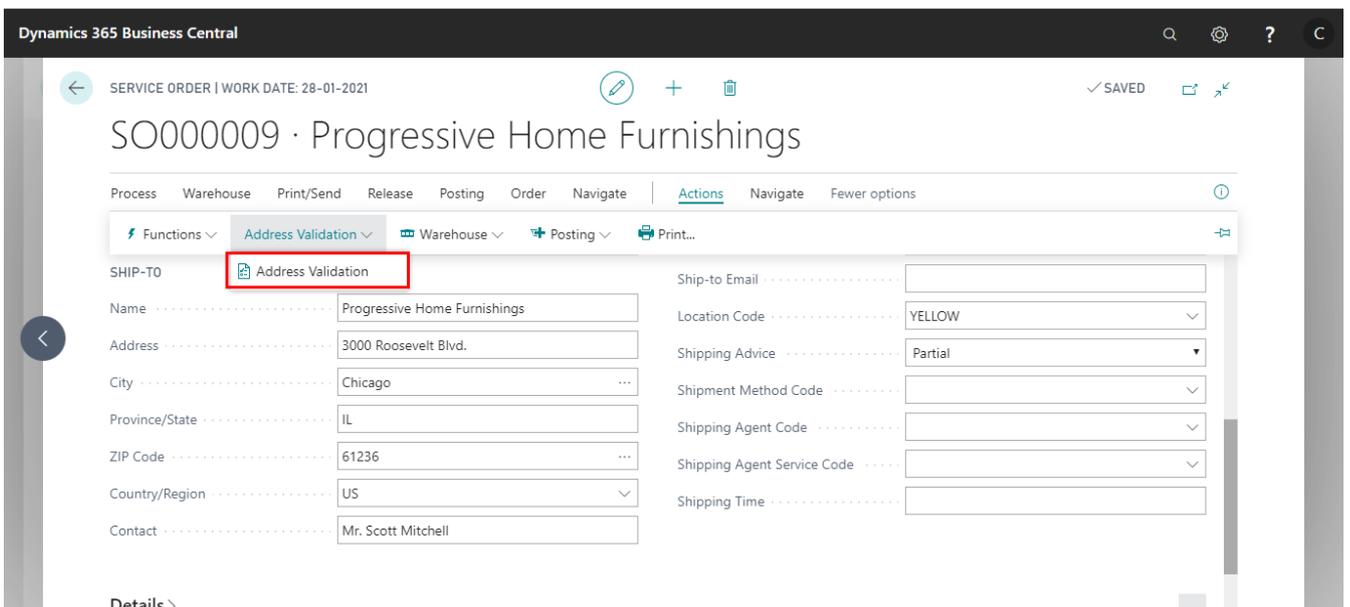


User will have choice to select the address from the **Address suggestion list** page and click on the **OK** button

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

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.