



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

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 Shipping Advice Partial

Base Calendar Code Customized Calen... No

Default Ship-To Ad... [Dropdown]

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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Base Calendar Code Customized Calen... No

Default Ship-To Ad... [Dropdown]

Customer Picture

Attachments Documents 0

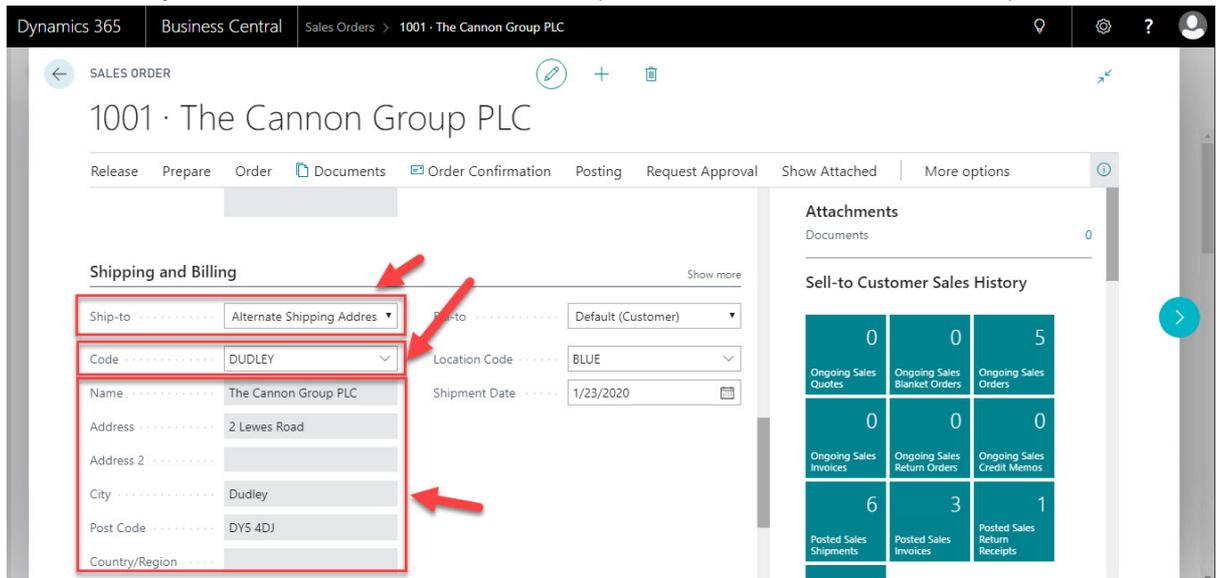
Sell-to Customer Sales History

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.



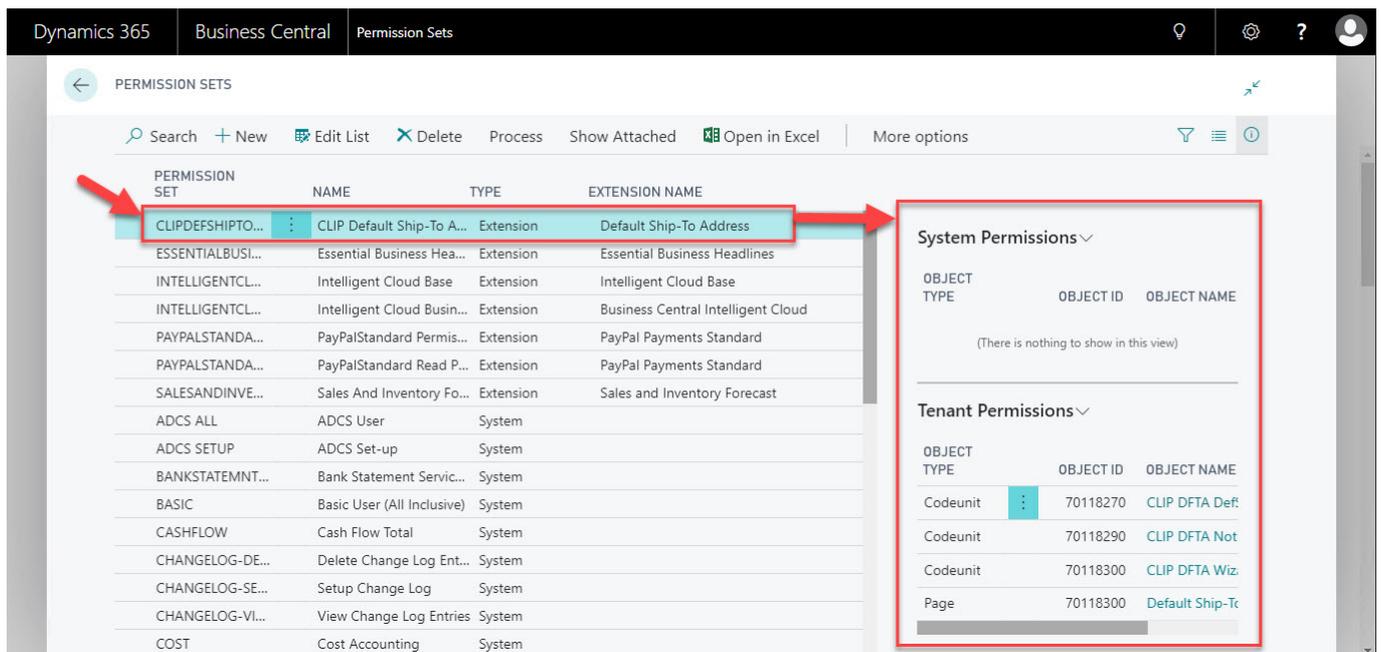
***NOTE: The *Default Ship-To Address* is used in the following Sales Documents: Quote, Blanket Order, Order, Invoice. It will not be used in the following documents: Return Order, Credit Memo.**

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

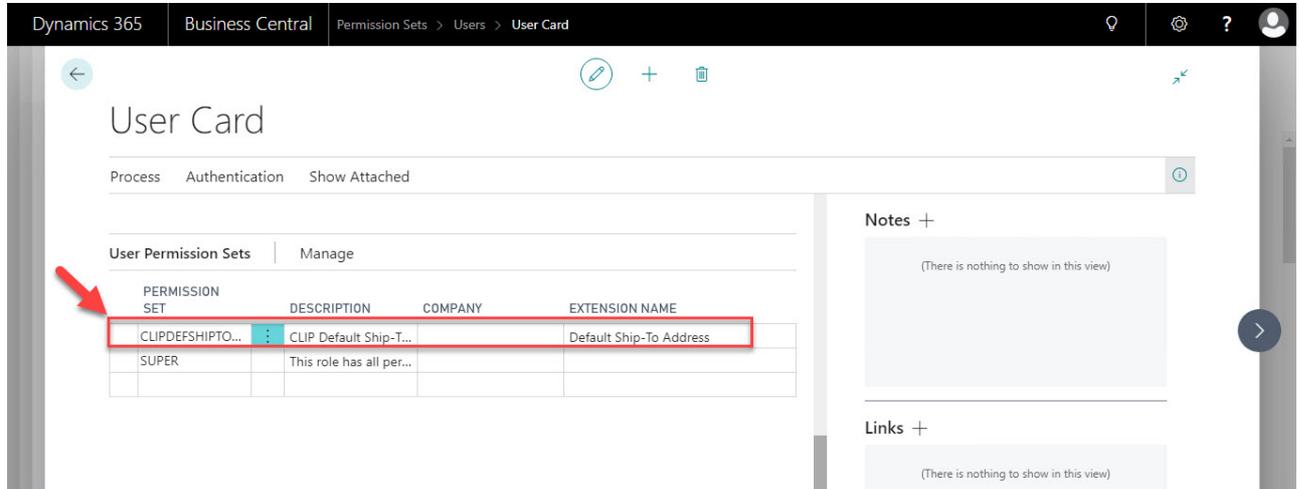
The **Default Ship-To Address** app creates a Permission Set called CLIPDEFSHIPTOADDRESS that provides access to the different objects created by the app.



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



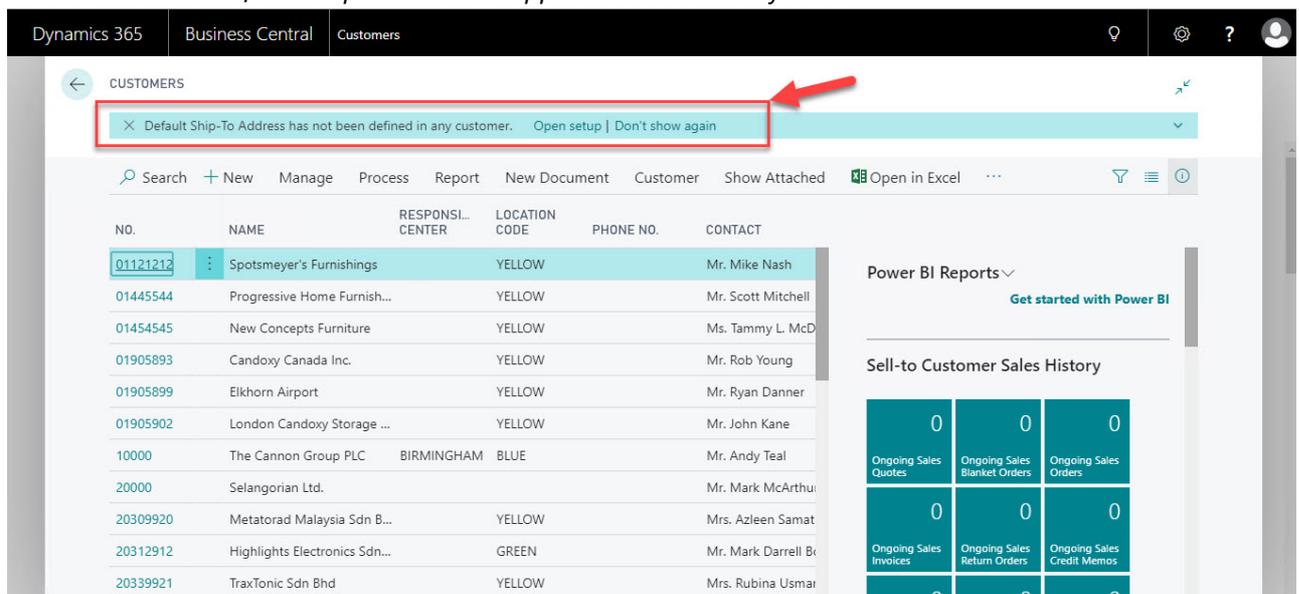
Configuring existing customers

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

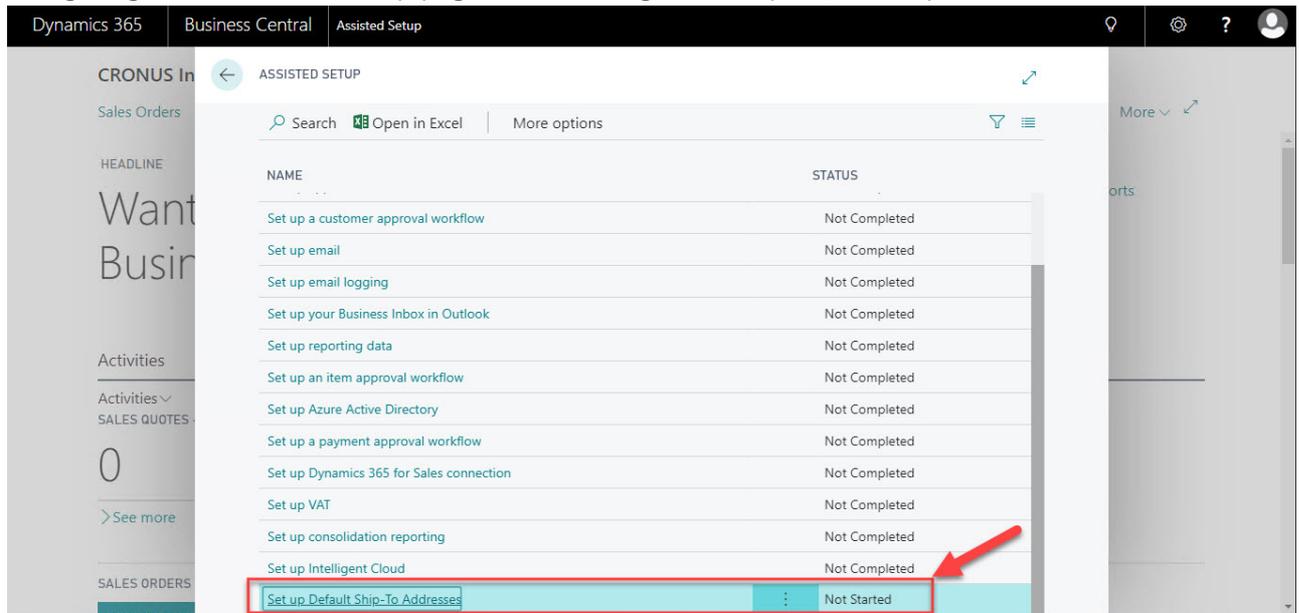
However, the **Default Ship-To Address app** provides an easy way of configuring all existing customers when installing the app. This quick configuration is done through an Assisted Setup.

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

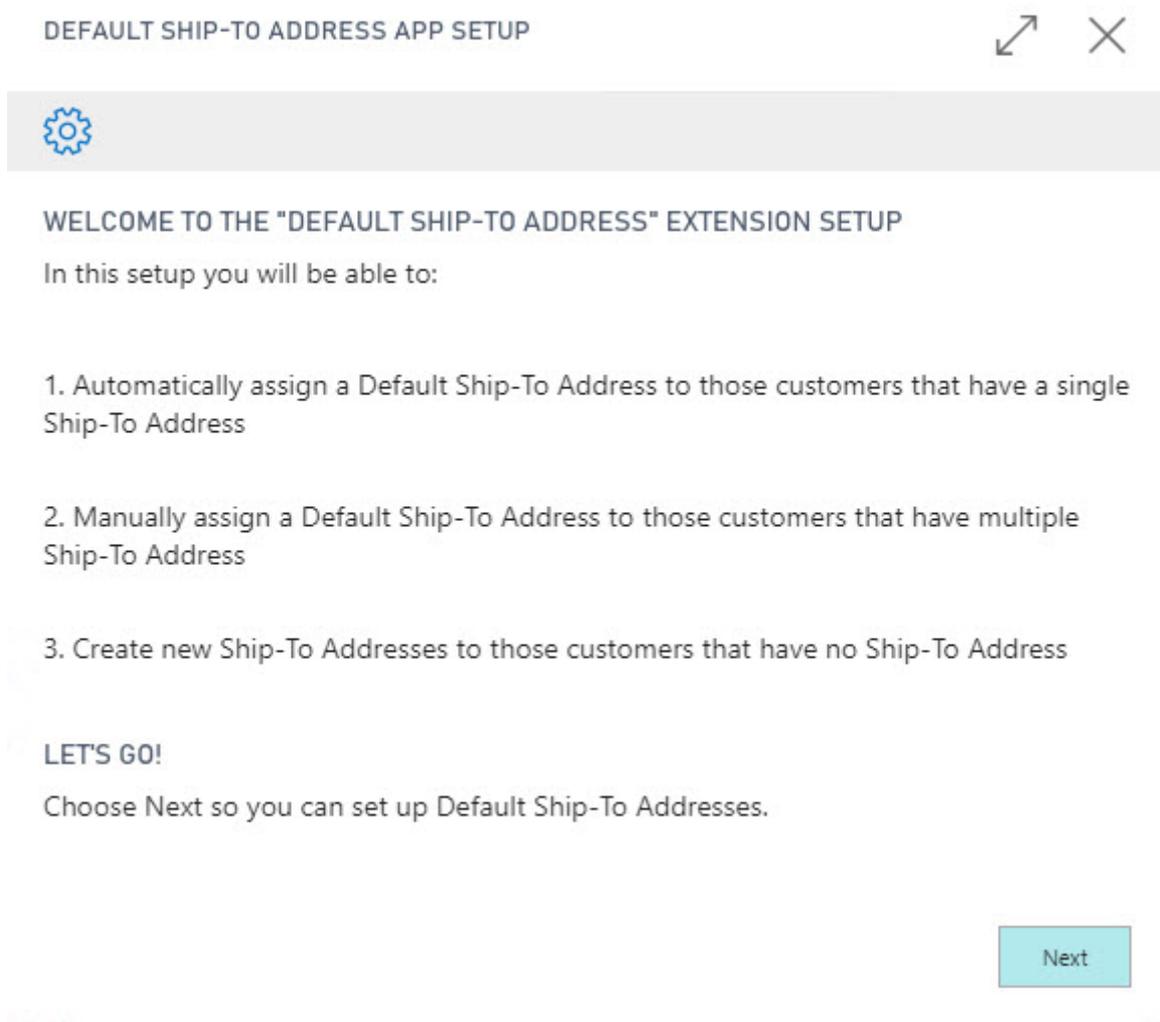


2. Navigating to the Assisted Setup page and selecting the *Set up Default Ship-To Addresses*



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

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 SHIP-TO ADDRESS	NO. OF SHIP-TO ADDRESSES	
10000	The Cannon Group PLC	DUDLEY	2	⋮
20000	Selangorian Ltd.		2	

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



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

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 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