

# Ship-To Location Setup

Ship-To's are customer shipping locations. The Ship-To record contains the sales tax settings, overrides and additional features. For IMS and Inventory customers, usage is recorded to these locations.

It's common to have multiple ship-to's with the same physical address, separated for the purpose of recording usage. Example: A hospital - one physical address, multiple departments.

## Ship-To Code

The Ship-To code can be 1 - 4 alpha-numeric characters. To add a new ship-to, type desired code then. answer 'yes' when prompted to add. Use the query icon to locate an existing ship-to's.

The Ship-To description field (unlabeled) displays when the Ship-To is selected. 35 characters Max.

## Shipper ID button

Override the customer's shipping defaults by location. Select a different **Ship Via** to enter a specific **Shipper ID**. Or select a different **Method of Payment**.

## 1. Address tab

1. **Name:** Formal name of Ship-To. Leave blank if same as description.
2. Standard **Address** & Phone fields(left).
  - a. **Best Practice:** Enter the Zip code and the City and State will autofill!
3. **Lookup:** Used when looking up Customers – enter up to 10 characters.
4. **Attention:** Used in correspondence.
5. **Greeting:** Used in electronic correspondence.

## Icons

There are 2 additional icons to the right of the Zip Code field:



Shortcut to map of address.



Shortcut to save address to Clipboard.

## 2. Items Mgmt. tab

This tab contains additional controls for Item Management. If no location usage type is set, usage will not be updated for this location.

The screenshot shows a software window titled "Ship-to Location - FMGLAA". It has several tabs: "1 Address", "2 Items Mgmt." (selected), "3 Codes", and "4 Additional". The "Items Mgmt." tab contains the following fields and controls:

- Customer: 00-OLIVE (with a search icon)
- Ship-to Code: 0001 (with a search icon)
- Location Code: 000000000 (with a search icon)
- Items Management Method: dropdown menu
- Multiple Count Stops: checkbox
- Will Call/Ship Out: dropdown menu
- OP Account: text field with a search icon
- Count Entry ID: text field
- Location Options: text field
- Wrap label/Drop Ship: dropdown menu
- Cost Center: text field with a search icon
- Receiving Department: 0001 (with a search icon)

At the bottom of the window, there are navigation buttons (Home, Back, Forward, Stop) and action buttons (Save, Clear, Delete, Exit). A status bar at the very bottom reads: "If no location usage type is set, usage will not be updated for this location!"

1. **Location Code:** Customer's Location Code (9 characters), some reports will print this field in addition to the Ship-To code.
2. **Item Management Method:**
  - a. I = Issue - usage based on items shipped/issued to this location. **Most Common**
  - b. C = Count - usage based on counting the items at this location (Perpetual). **Rare**
3. **Multiple Count Stops** – used with count method.
4. **Will Call/Ship Out:** Used with Essendant catalog, select from Will Call, Ship Out or none.
5. **OP Account:** Override to Customer's Office Product Account.
6. **Count Entry ID:** Used for Restocking Gateway.
7. **Location Options:** A = New Entries not counted, B = Stock Items not counted, R or W = Auto Replenishment. Overrides the Customer settings.
8. **Wrap label/Drop Ship:** For Office Products
9. **Cost Center:** Select Cost Center to pair with Ship-To (if configured) Rare
10. **Receiving Department:** Override to Customer Receiving Department.

### 3. Codes tab

This tab contains a variety of settings related to tax status/codes, shipping overrides and web eCommerce settings.

1. **Sales Tax Code:**\*Required field
2. **Tax Exempt:** Yes / No or Varies by Invoice Line.
3. **Default Supply Warehouse:** Override to Customer setting.
4. **Security Items Allowed:** Secure Forms Permitted at this location.
5. **FOB:** Override to Customer default.
6. **How to Ship:** Override to Customer default.
7. **Inside Delivery:** Text box for inside delivery instructions.
8. **Ship Via:** Override to Customer default.
9. **Exclude from EC?** Excludes item from eCommerce.
10. **E-Mail:** Email address for this Ship-To.
11. **Ignore EC Maximums?** eCommerce override related to min/max settings.

### 4. Additional tab

This tab contains additional address lines if needed.

In review, create at least one ship-to for every physical location to meet tax requirements. Create any additional locations for usage recording.

*For questions, contact [service@demandbridge.com](mailto:service@demandbridge.com).*