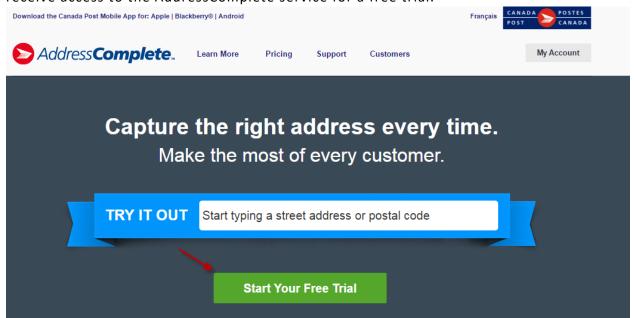


<u>Setup & Usage for "CanadaPost</u> <u>AddressComplete Integration" App</u>

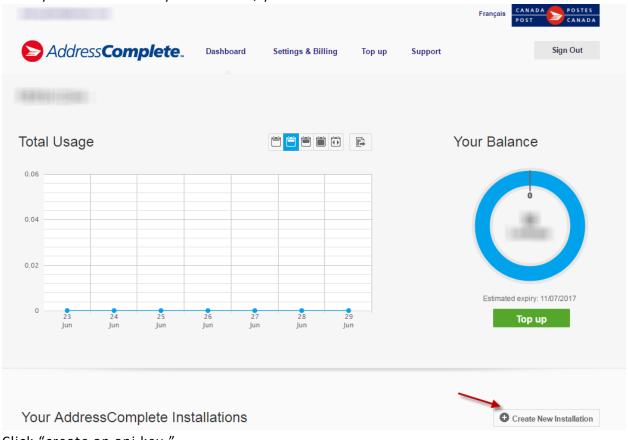
Setup

1. Visit <u>CanadaPost - AddressComplete</u> to obtain your API Key. If you do not already have an AddressComplete account, you may "Start Your Free Trial". You will receive access to the AddressComplete service for a free trial.

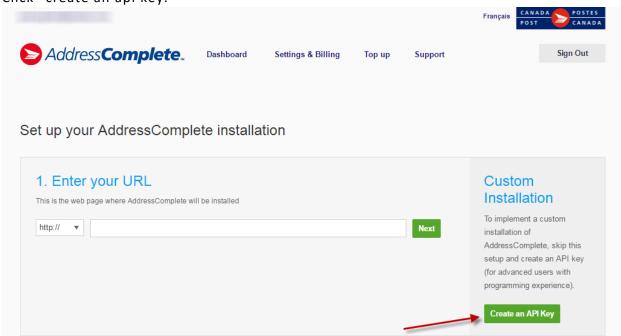




2. Once you have created your account, you will want to create a New Installation.

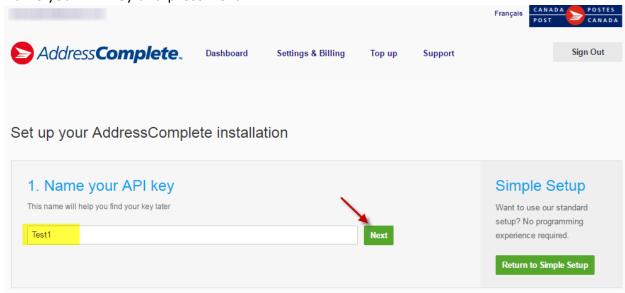


3. Click "create an api key."





4. Name your API key and press Next.



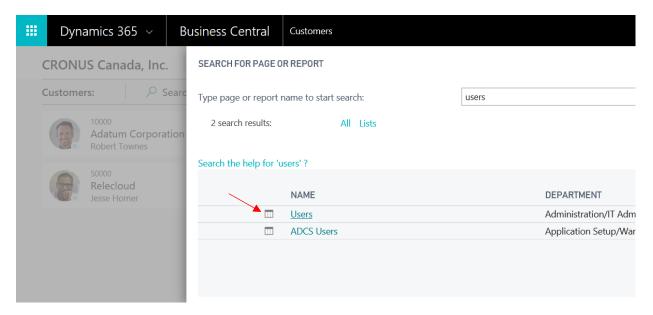
5. Your API key will be displayed in the general settings. Take note of your key as you will need it when setting up your CanadaPost AddressComplete integration application.



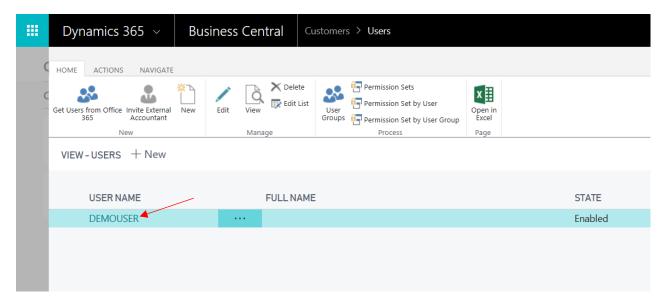
General Advanced	
Name Test1	Helps you identify where this installation is being used, e.g., Site A Checkout
TOST 1	
Daily Limit (\$)	Select the maximum spend allowed in a day.
\$200.00	anowou in a day.
Unlimited	
Valid URLs	We strongly reccomend that yo
Ac	restrict your installation to the URLs on which you plan to use AddressComplete.
	Audio3500mpiete.
IP Limiter	Use this to restrict the number
Off	requests from any IP address per day. Useful to stop abuse o
	your service.
Save	
API Key	



- 6. For additional options and information about the Canadapost AddressComplete application, please review the support information provided at: CanadaPost Address Complete Support
- 7. Assign User App Permissions by using the search function and typing "users" in the search field.

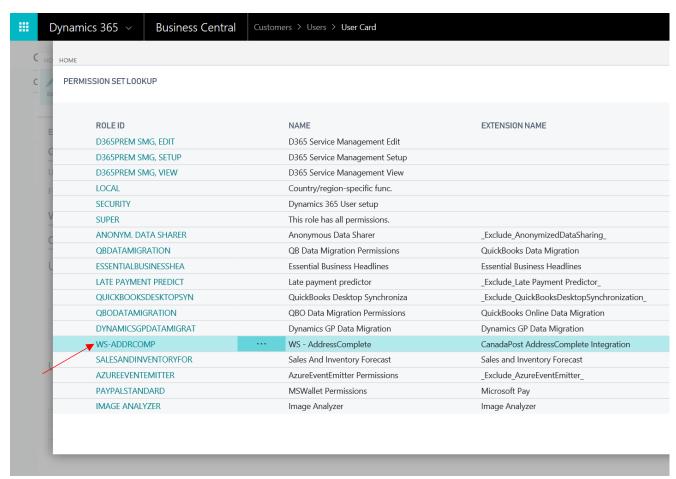


8. Drill into user.



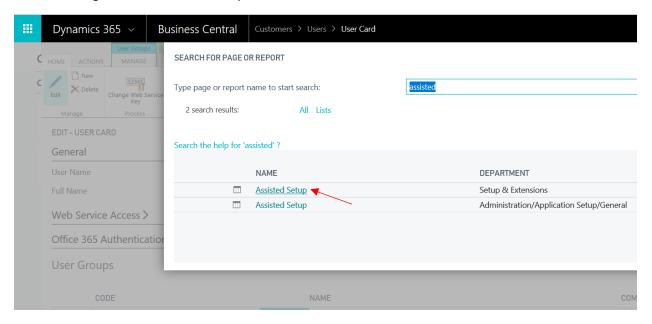


9. Add WS-ADDRCOMP permission set.



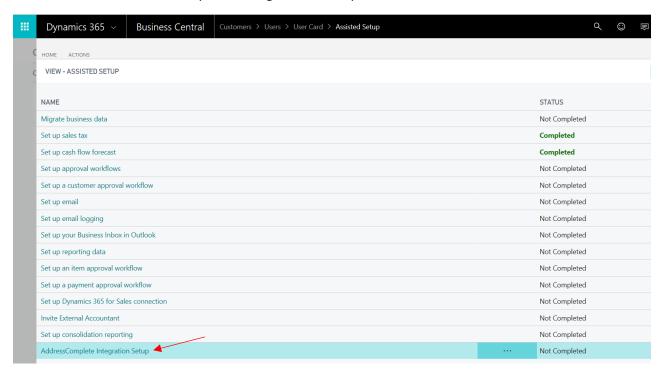


10. Navigate to Assisted Setup.





11. Launch AddressComplete Integration Setup





12. Click Next to begin setup.

WSI0004 SETUP WIZARD



WELCOME TO THE ADDRESS COMPLETE INTEGRATION SETUP WIZARD.

To be able to use the AddressComplete address validation service provided by CanadaPost, you need to supply your API key information.

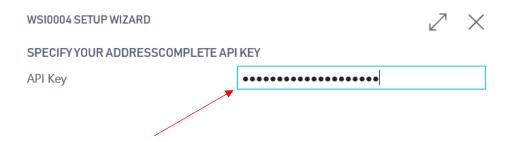
LET'S GO!

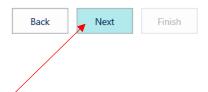
Choose Next so you can configure your AddressComplete integration.





13. Enter API Key provided by CanadaPost Address complete.







Select your options and press next to continue.

WSI0004 SETUP WIZARD				~	\times
SPECIFY YOUR ADDRESSCOMPLETE INT	EGRATION O	PTIONS.			
Maximum Suggestions	5				~
Maximum Results	5				~
Reuse Found					
Address Language	System				~
		Back	Next	Fin	ish

Maximum Suggestions - The maximum number of autocomplete suggestions to return from the AddressComplete API.

Maximum Results - The maximum number of retrievable address results to return.

Reuse Found - This feature will re-use a previously found address if possible instead of making a new request to the AddressComplete service. This can save you money because you will not be charged for an API address lookup in this case.

Address Language - Address Language

This option will attempt to use the selected language option for the address information. If the chosen language is not available, the first language returned by the service will be used.



Complete the setup by selecting Finish.

WSI0004 SETUP WIZARD



THAT'S IT!

Choose Finish to complete the AddressComplete integration setup.

HelpLbl

To learn more about the AddressComplete i...

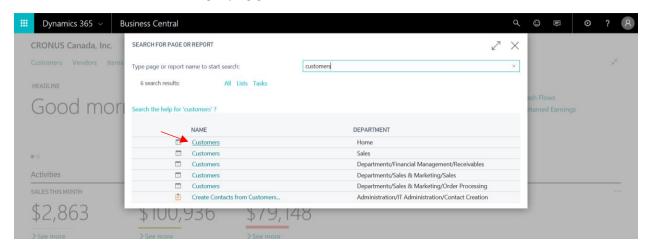




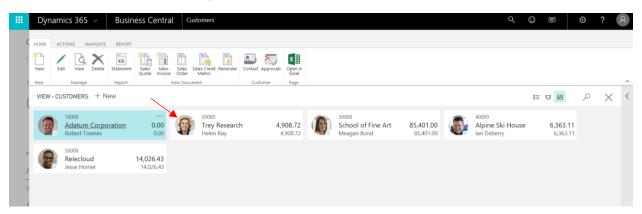
Usage

The AddressComplete integration will allow you to search for and validate addresses throughout Microsoft Dynamics 365 Business Central.

Customer Address - Use the magnifying glass to search for Customers.

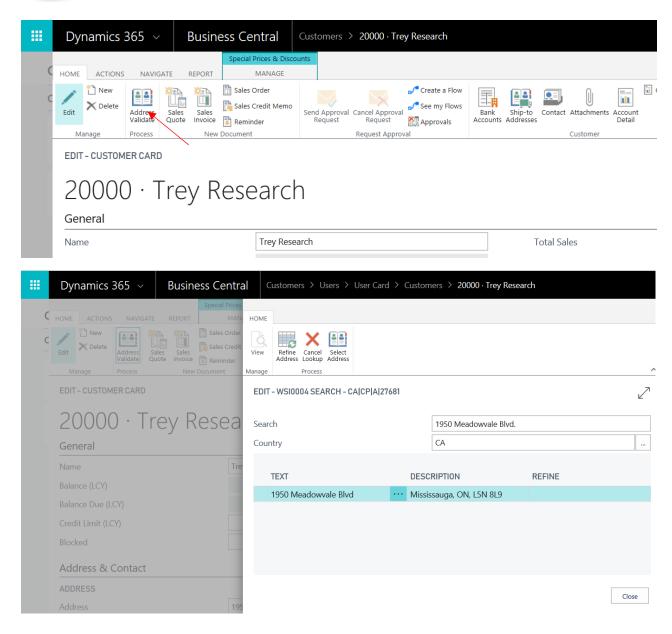


Drill into the Customer for which you would like to validate their address.



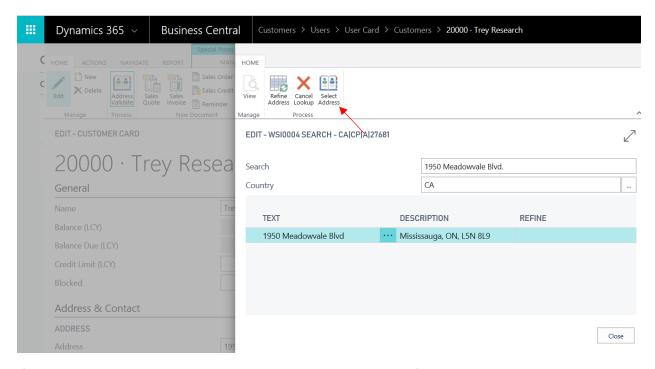
Press the Address Validate action. The current Address information will be fed into the AddressComplete address verification page for validation.



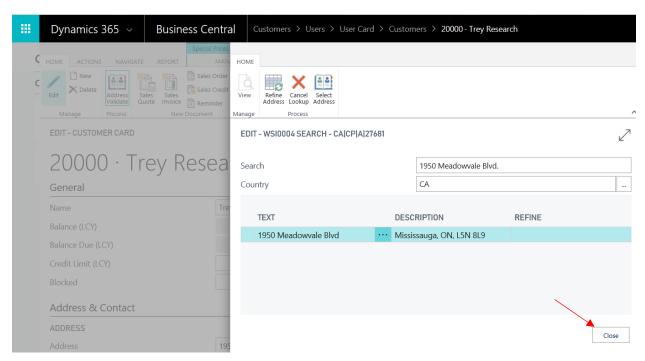


If you are satisfied that the correct address has been selected and you wish to update the customer address information with the address information provided from this service, press the Select Address action.

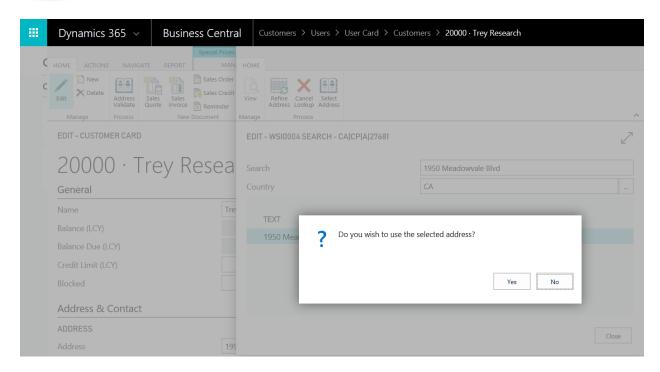




If you have an address selected and press close, you will be asked if you wish to use the selected address.





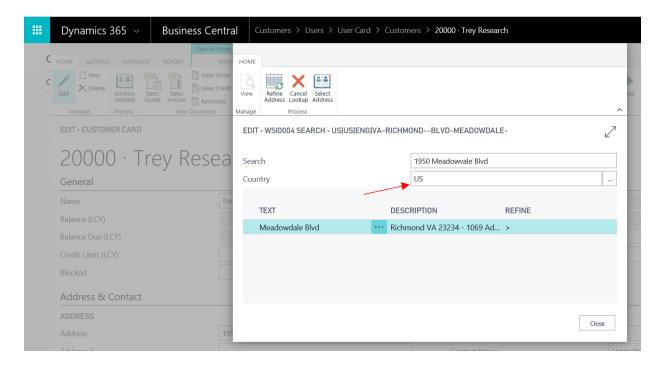


If you choose No, the address information will not be updated within Dynamics 365 Business Central and your API key will not be charged for a lookup. Selecting Yes will update the address information in Dynamics 365 Business Central based on the data provided from the CanadaPost AddressComplete API.

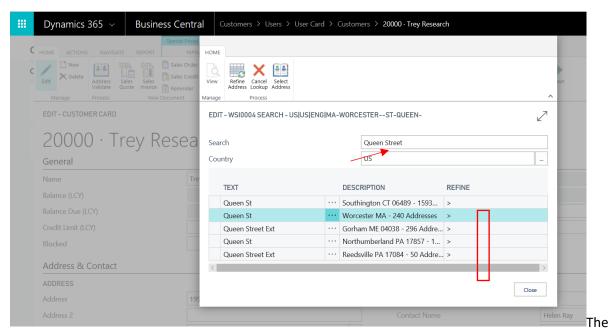
Revising Addresses

When you are on the AddressValidate page, you can adjust your search criteria. The Country is defaulted based on the address information provided by Dynamics 365 Business Central. But, you can change this to any country code defined in your Dynamics 365 Business Central environment. Let's try changing the Country on your previous example to "US".



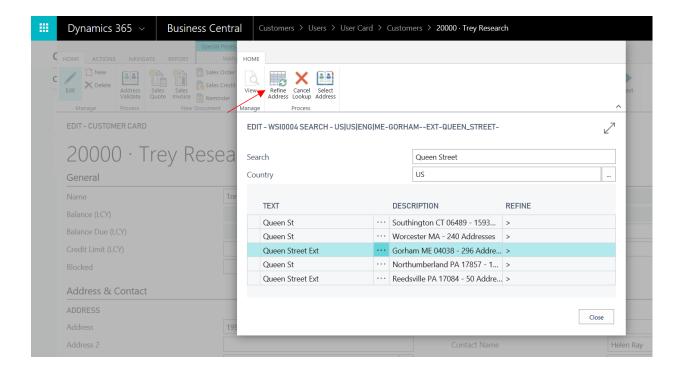


You are now presented with options to choose based on your Search string. Let's adjust the search string to be Queen Street.

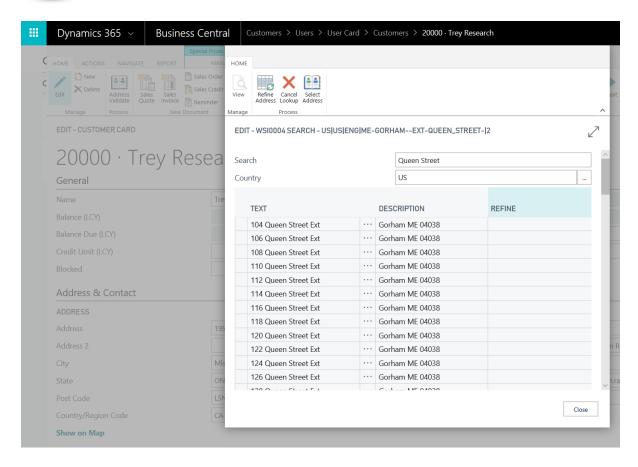


Refine column becomes populated in this case. The refine column indicates that this address line displayed does not map to one specific address but a set of addresses. We will need to refine this information to get down to a single address. Choose the line that matches the address we want and press on the Refine Address action.



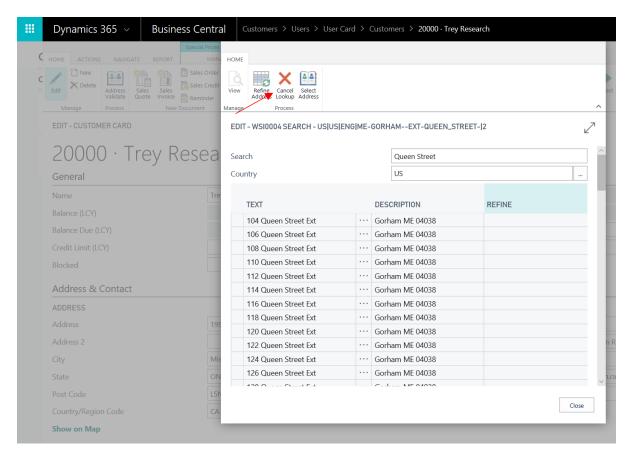






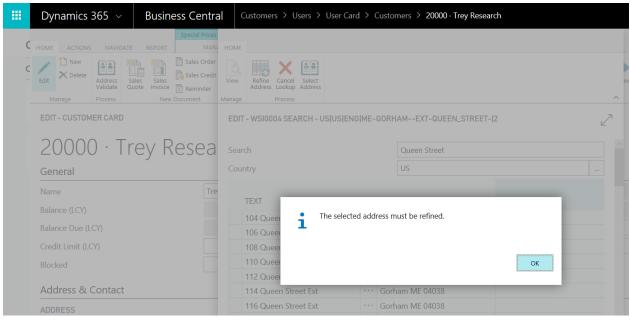
You will be presented with all address options that are available for the previously selected address. Either adjust the search parameter to begin a new address search or select the correct address. Press either the Select Address option to choose this address or click the Cancel Lookup to cancel your address search.

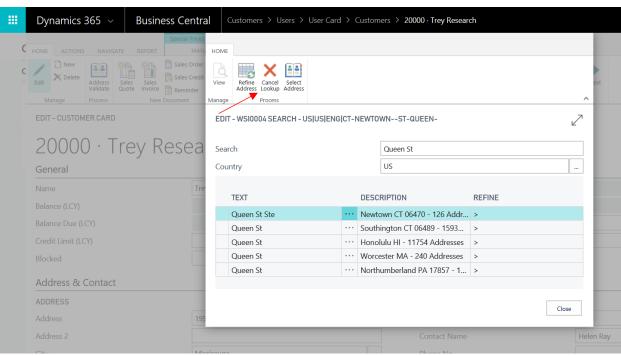




Note: You will not be able to click the close button if you have a "refine" address selected. If you want to close the page without looking up an address press the Cancel Lookup action. Otherwise, press refine address to refine the address.

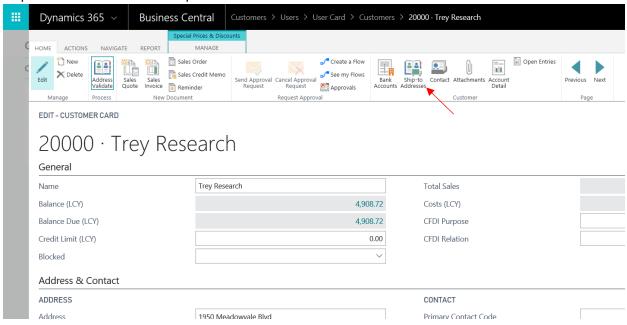




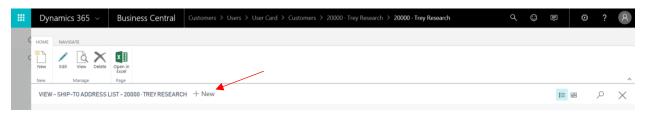




Ship-to Address – Press the ship-to Addresses action for the customer.

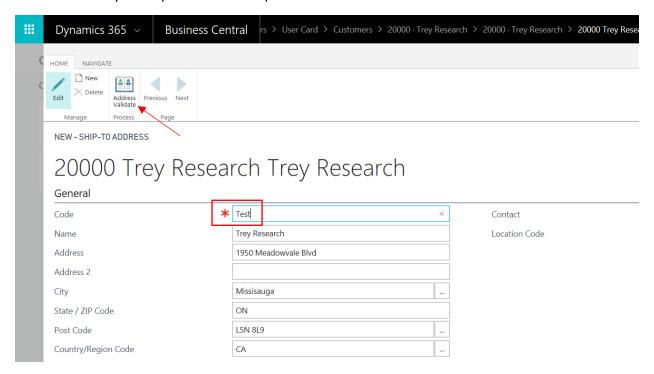


Create a new ship-to address

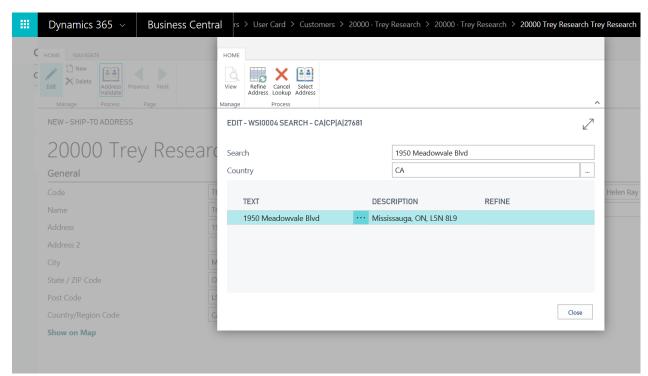




Enter a code for your ship-to address and press the Address Validate action.

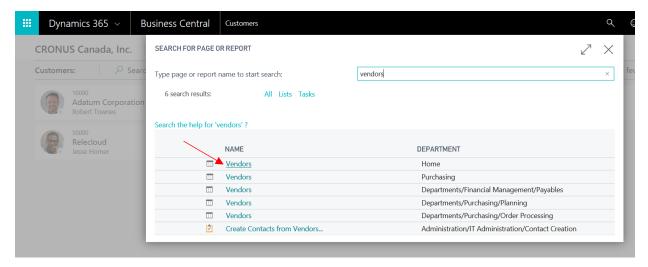


Search for and update your ship-to address as required.

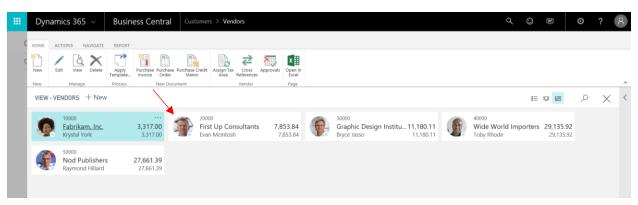




Vendor Address – Search using the magnifying glass for vendors.

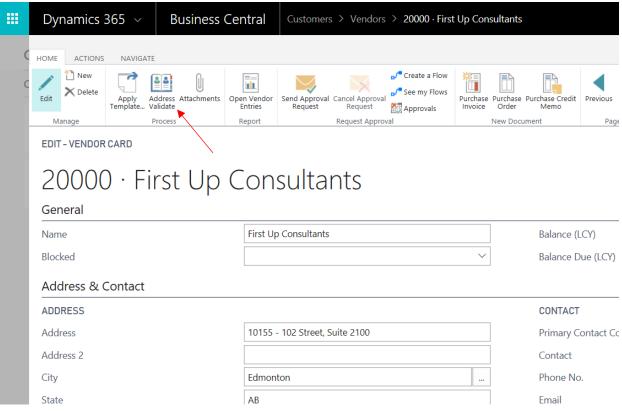


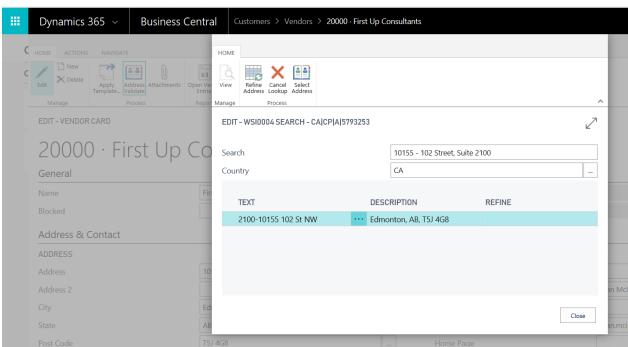
Press the vendor you are interested in.



Press the Address validate action to validate the vendor address.









Sales Quote, Sales Order, Sales Invoice, Sales Credit Memo & Purchase Order, Purchase Invoice, Purchase Credit Memo.

When validating addresses on a Sales Document, you have three options depending on the document. By pressing the appropriate action, you will validate the address just on the document you are on.

