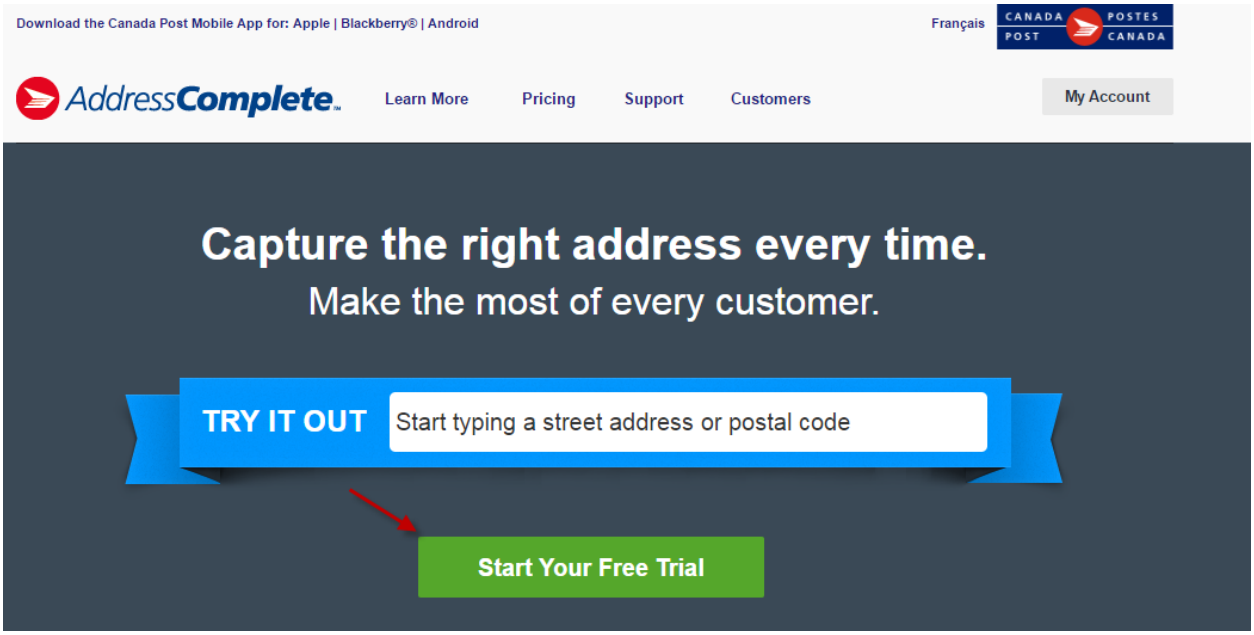
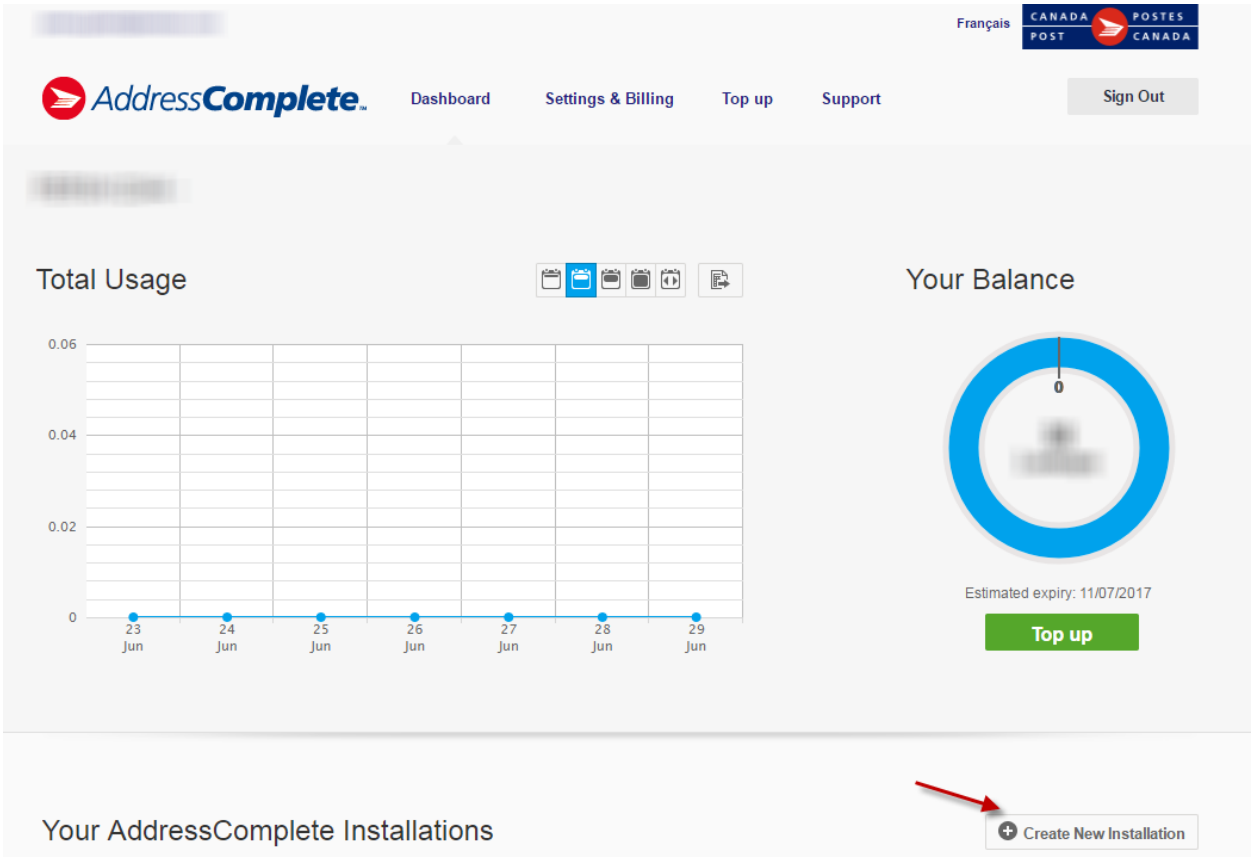
Setup & Usage for "CanadaPost AddressComplete Integration" App

Setup

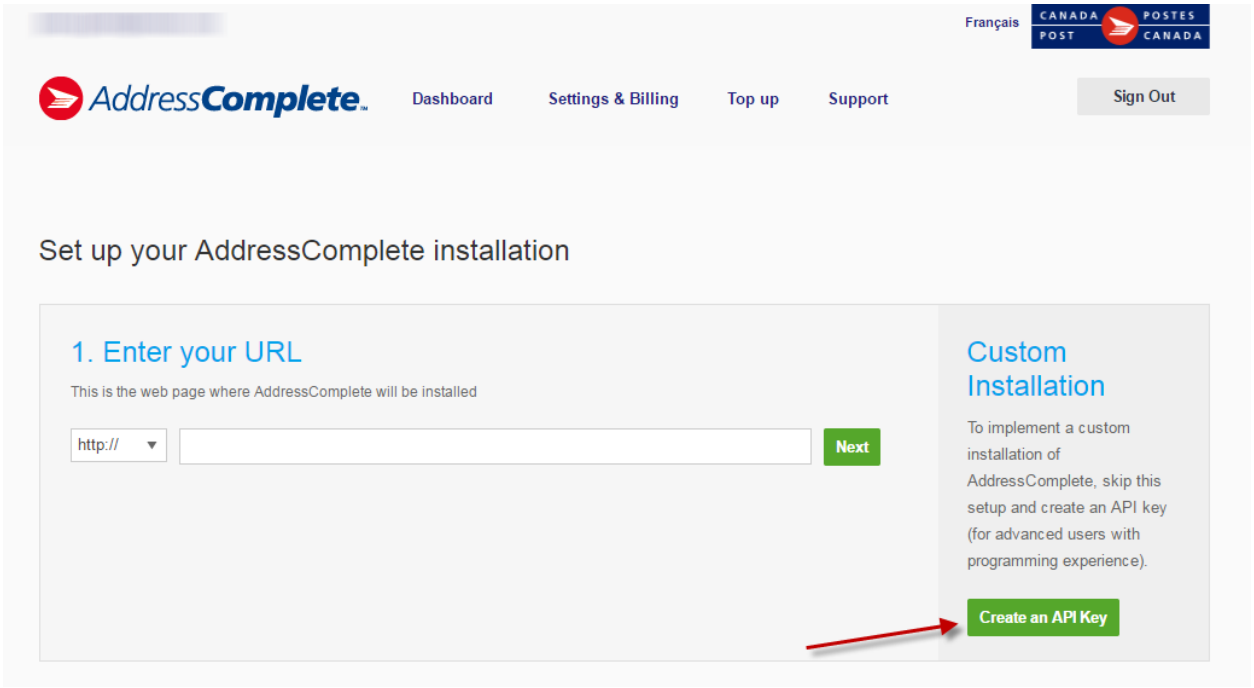
1. Visit CanadaPost - AddressComplete to obtain your API Key. If you do not already have an AddressComplete account, you may "Start Your Free Trial". You will receive access to the AddressComplete service for a free trial.



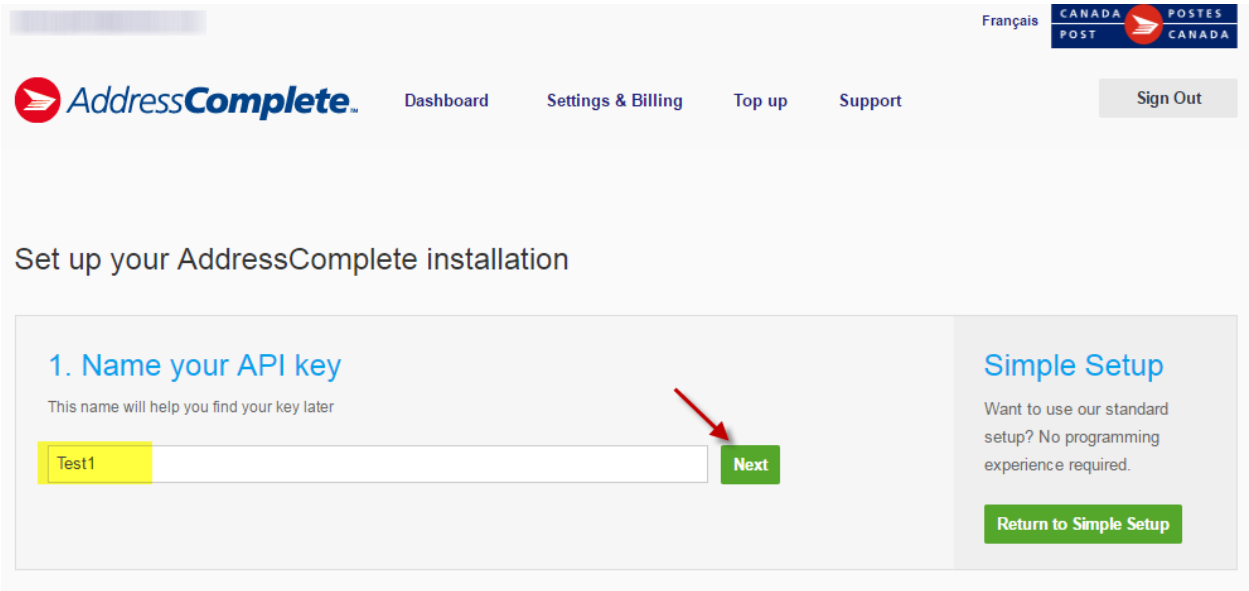
2. Once you have created your account, you will want to create a New Installation.



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.

WebSan Solutions Inc.

Settings

General | Advanced

Name

Test1

Helps you identify where this installation is being used, e.g., Site A Checkout

Daily Limit ($)

$200.00

☐ Unlimited

Select the maximum spend allowed in a day.

Valid URLs

Add

We strongly reccomend that you restrict your installation to the URLs on which you plan to use AddressComplete.

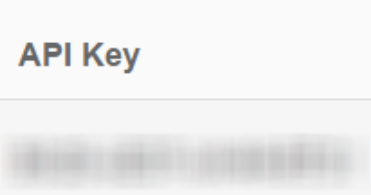
IP Limiter

Off

Use this to restrict the number of requests from any IP address per day. Useful to stop abuse of your service.

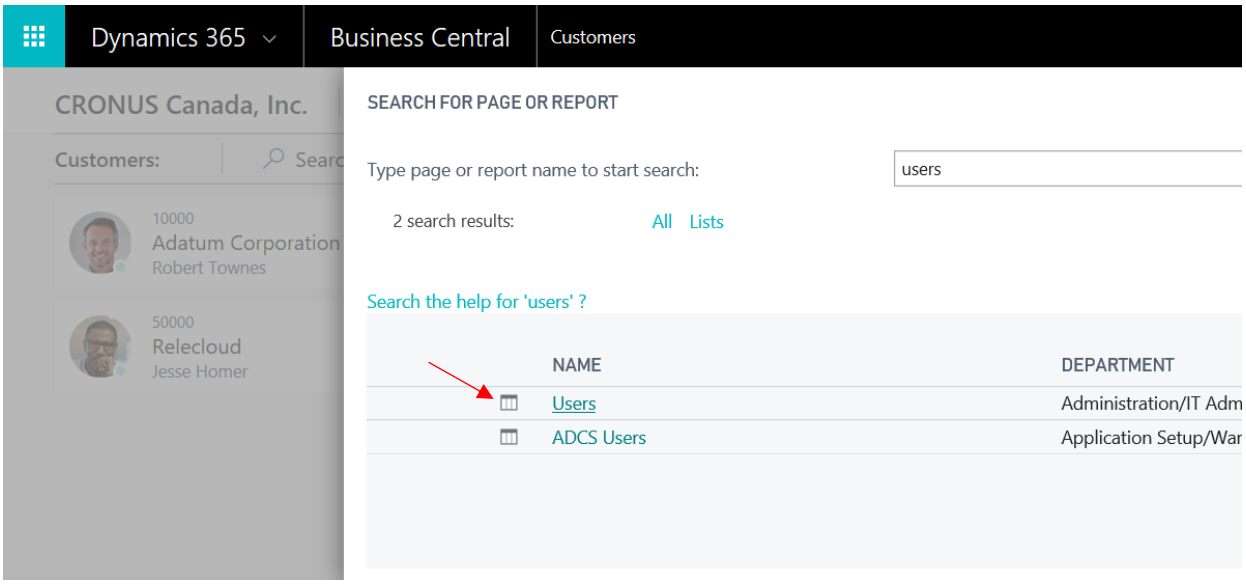
Save

API Key

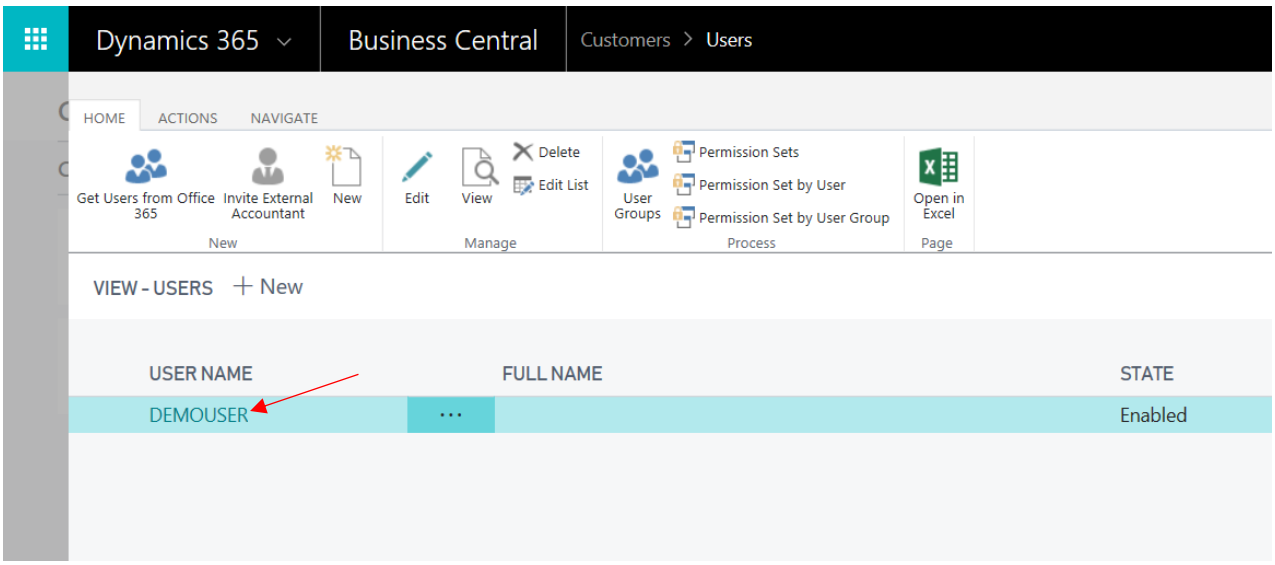


6. For additional options and information about the Canadapost AddressComplete application, please review the support information provided at: [CanadaPost Address Complete Support]

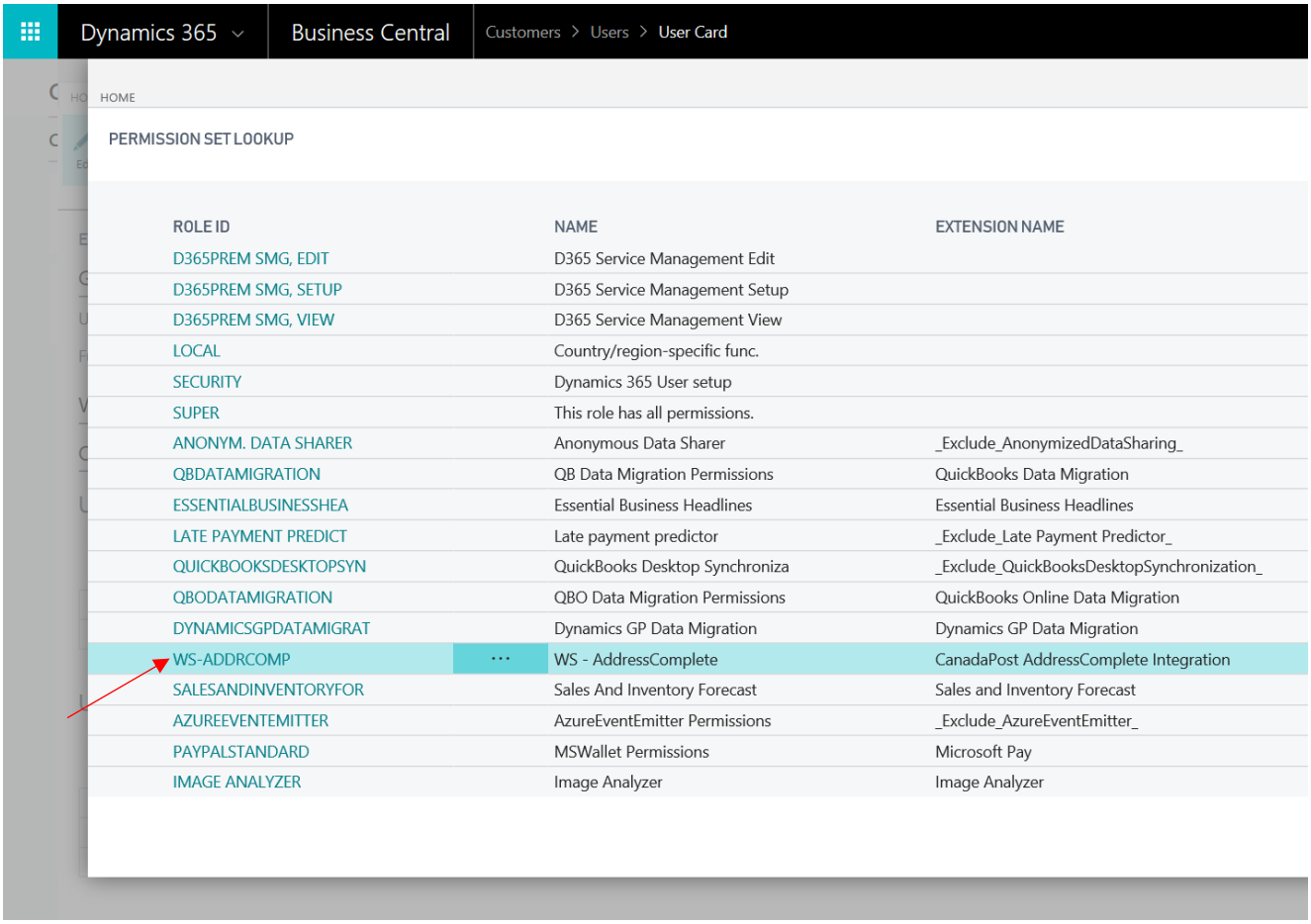
7. Assign User App Permissions by using the search function and typing “users” in the search field.



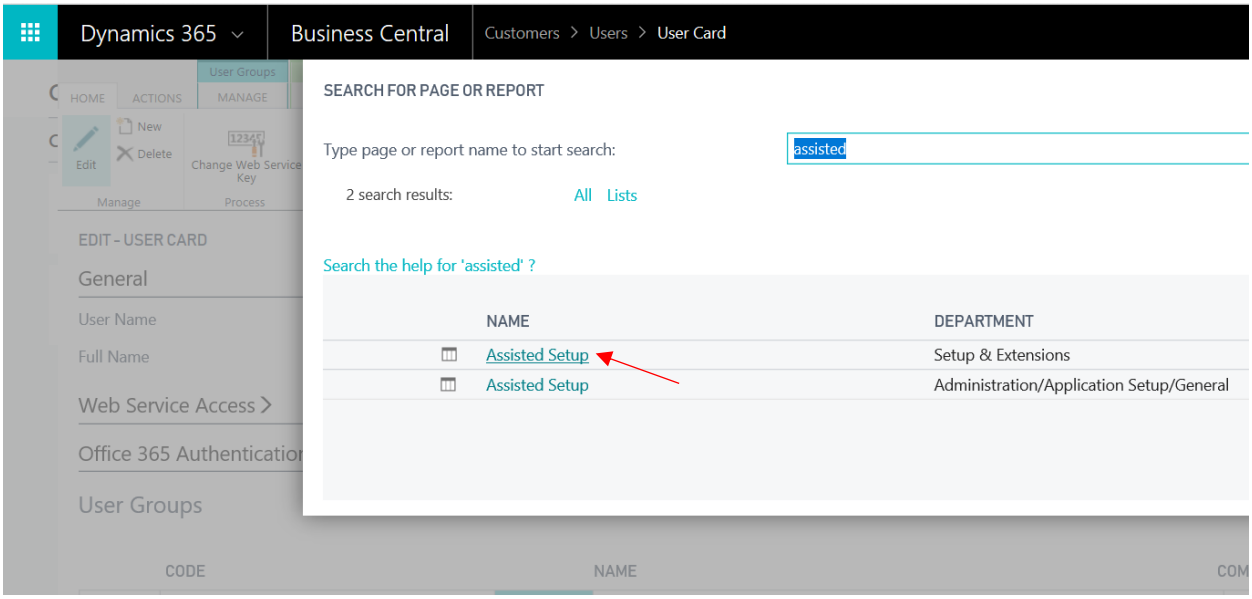
8. Drill into user.



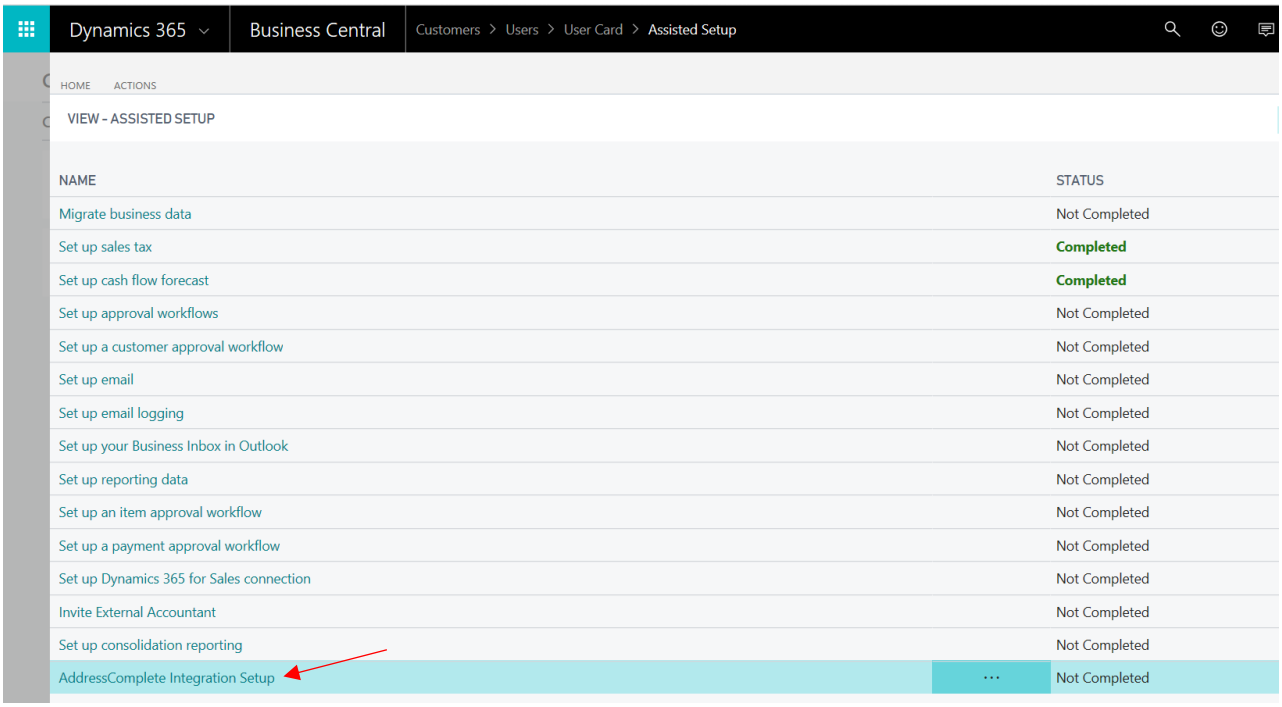
9. Add WS-ADDRCOMP permission set.



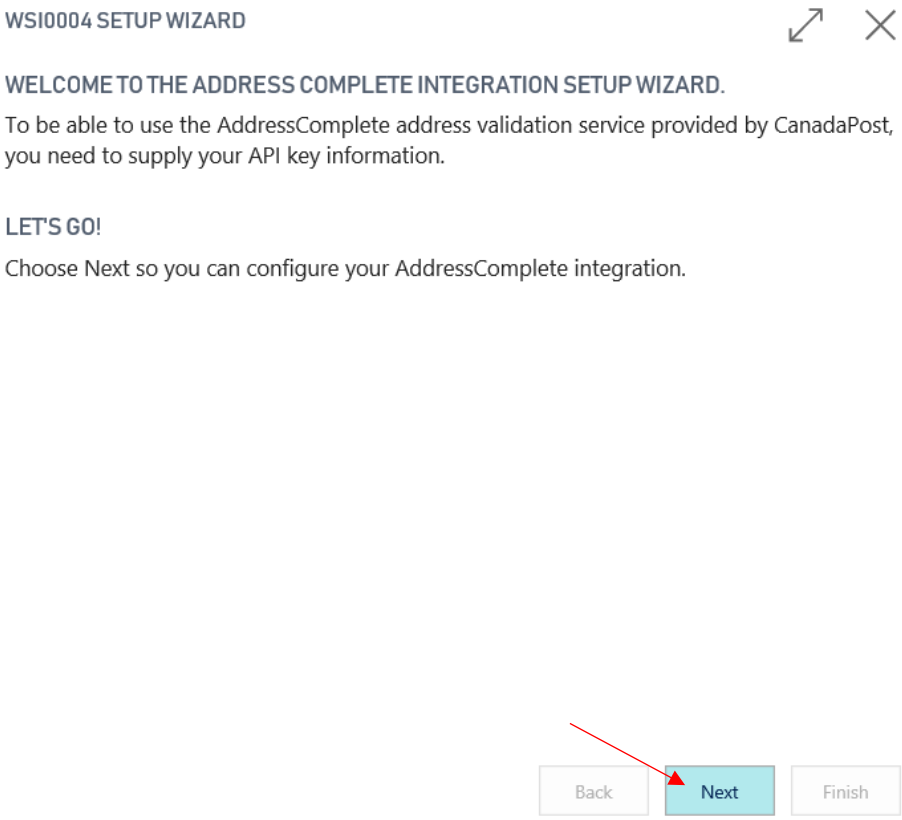
10. Navigate to Assisted Setup.



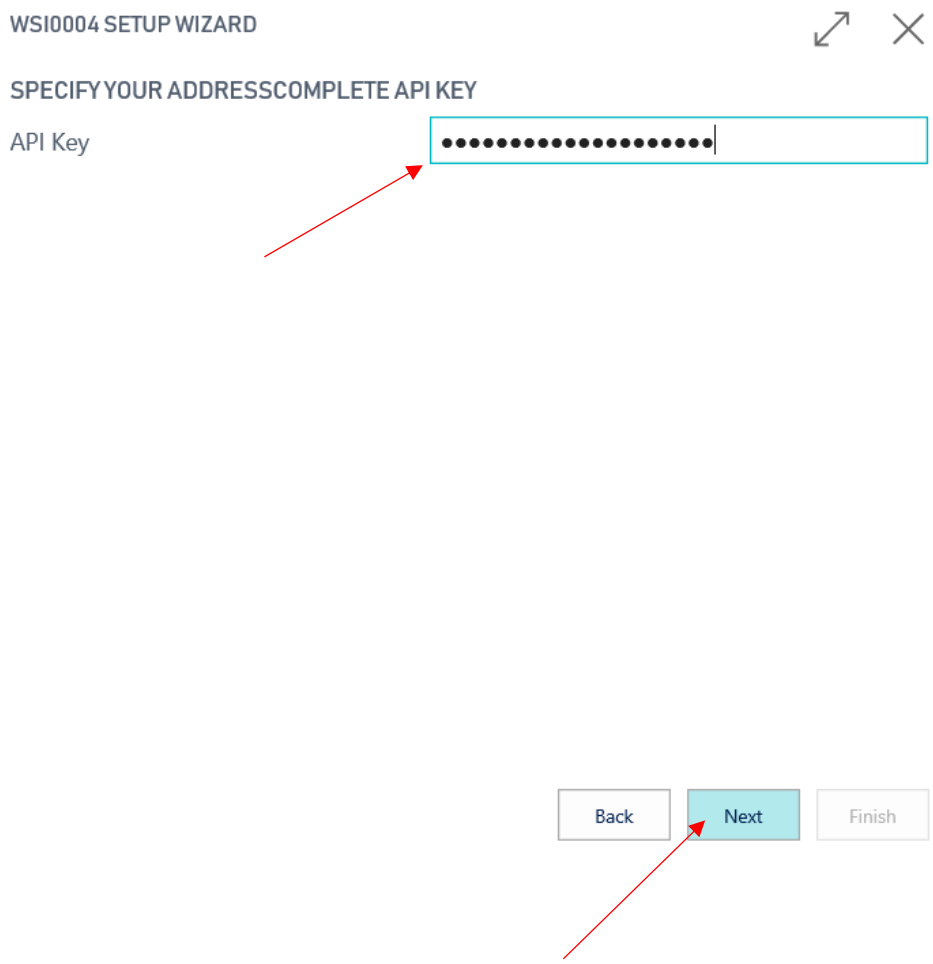
11. Launch AddressComplete Integration Setup



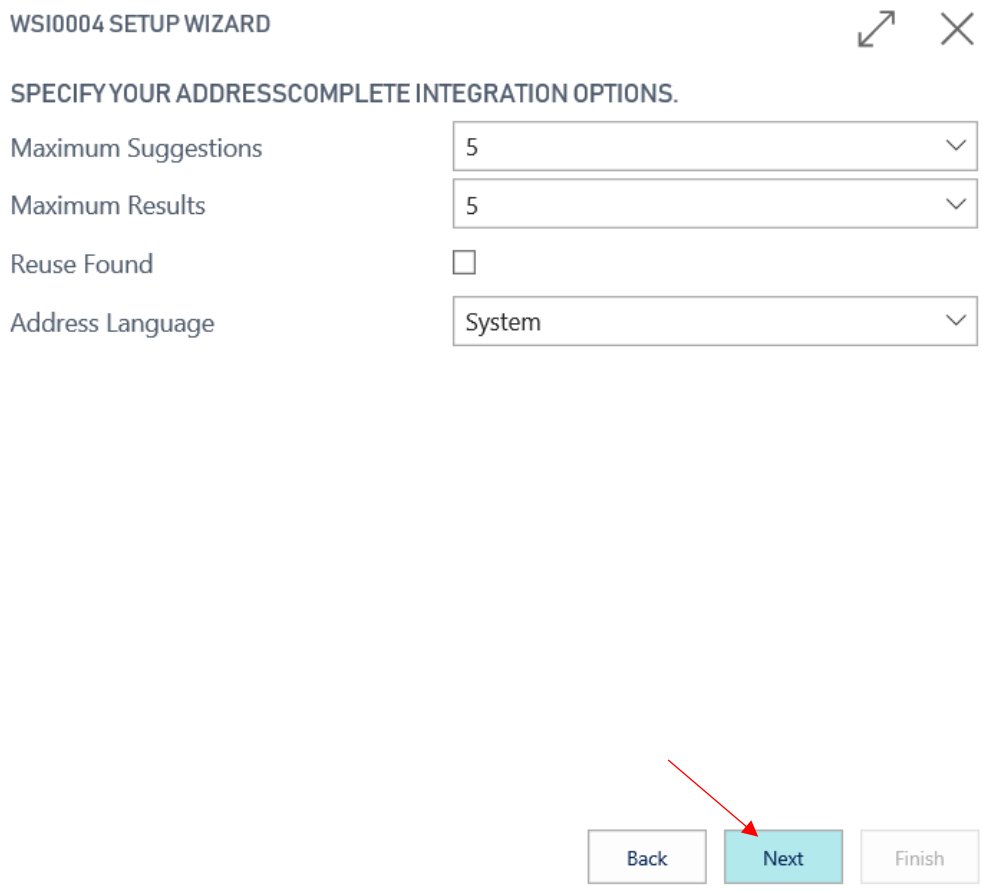
12. Click Next to begin setup.



13. Enter API Key provided by CanadaPost Address complete.



Select your options and press next to continue.



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

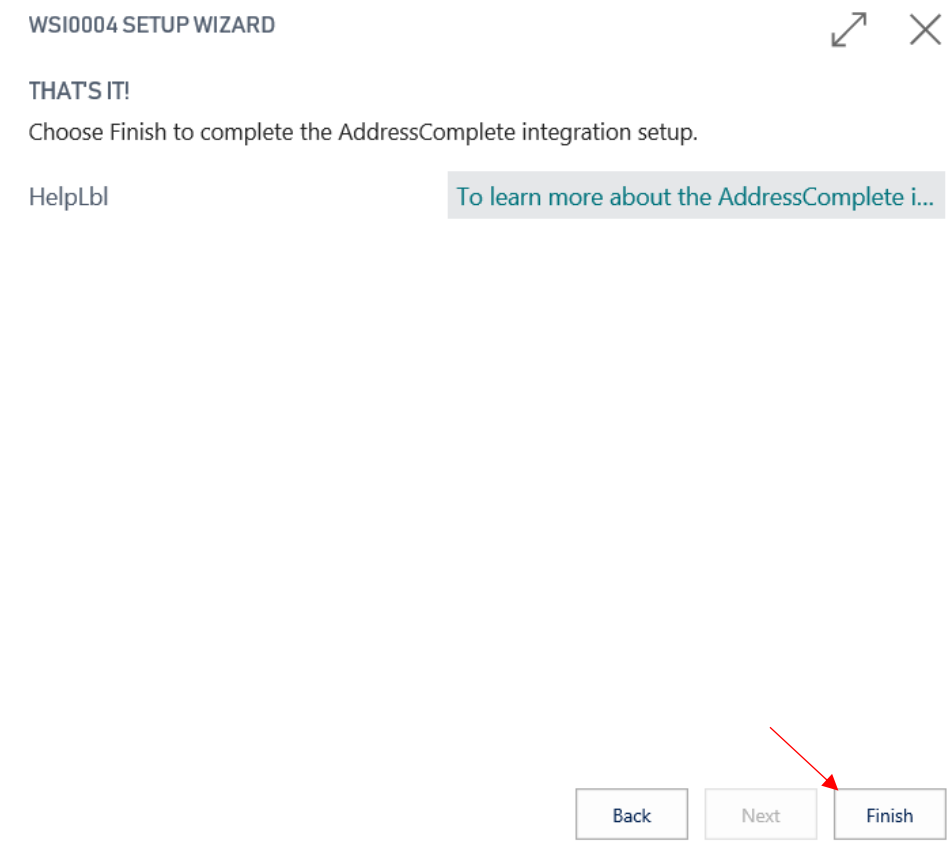
Maximum Results - The maximum number of retrievable address results to return.

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.

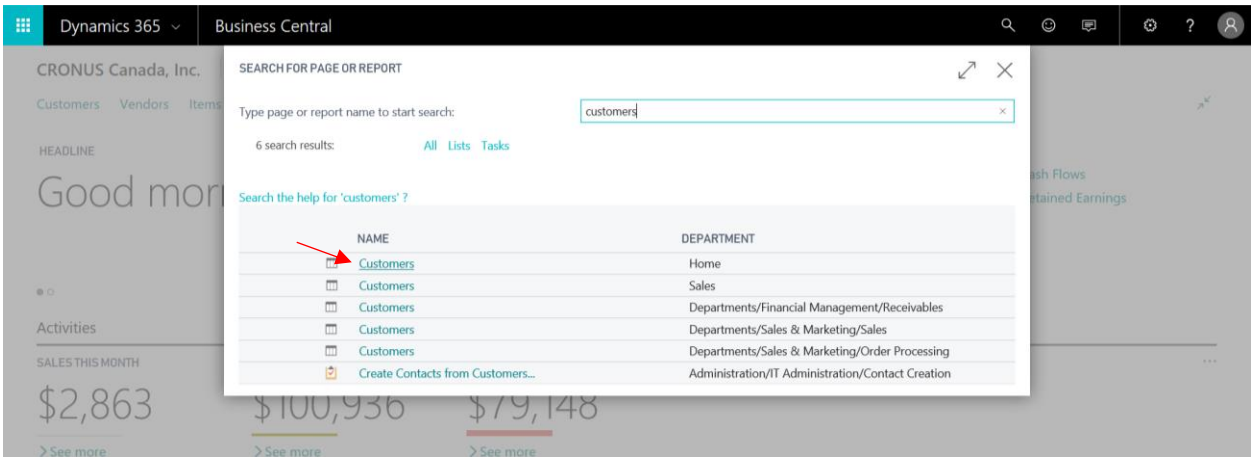
Complete the setup by selecting Finish.



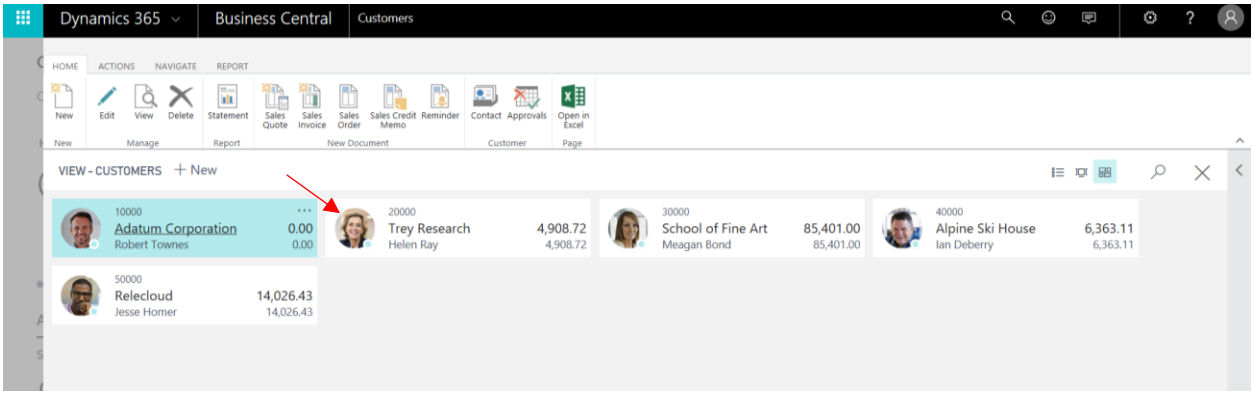
Usage

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

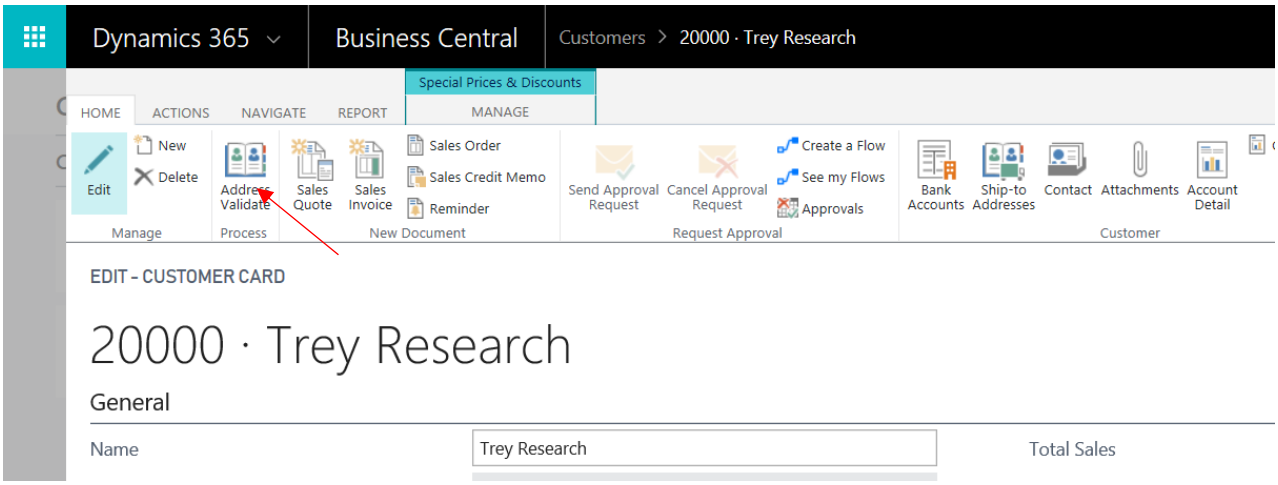
Customer Address - Use the magnifying glass to search for Customers.

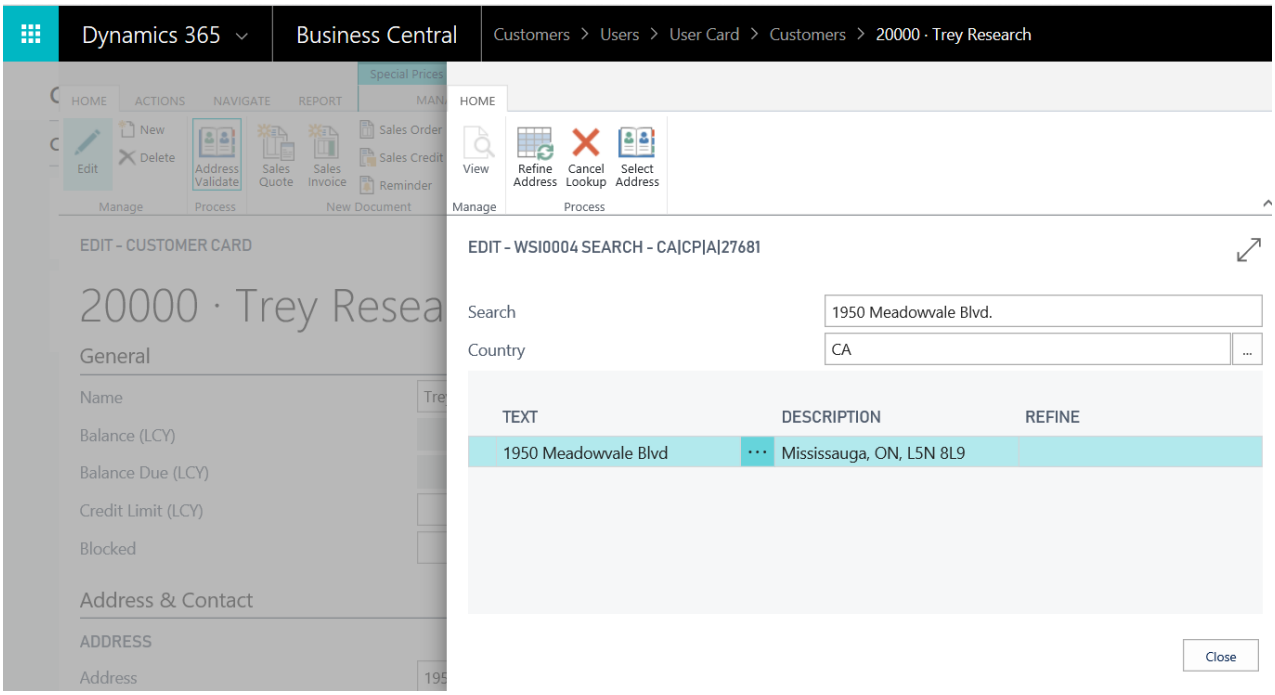


Drill into the Customer for which you would like to validate their address.

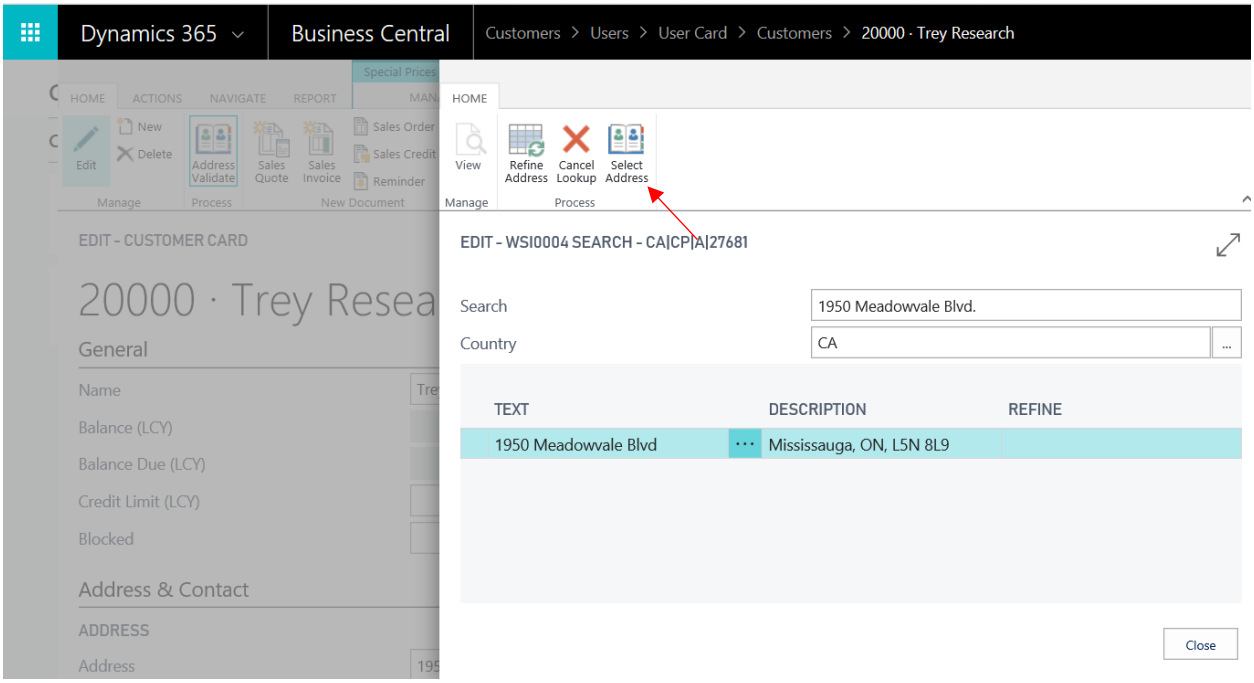


Press the Address Validate action. The current Address information will be fed into the AddressComplete address verification page for validation.

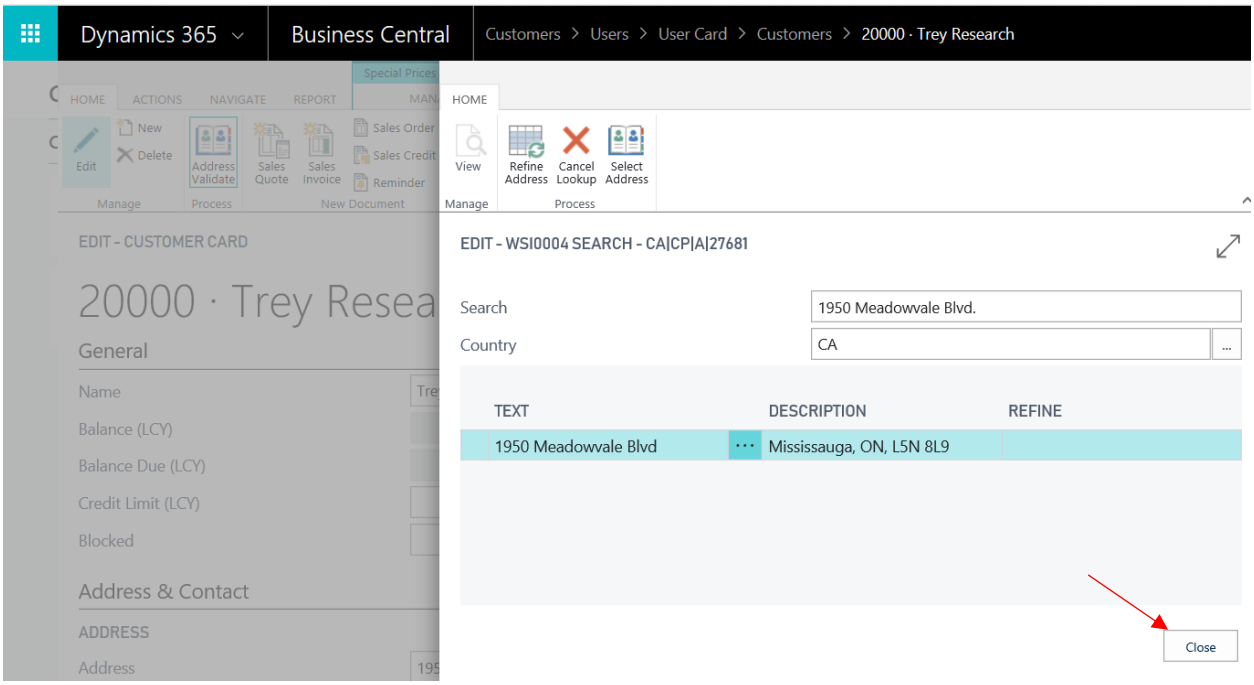


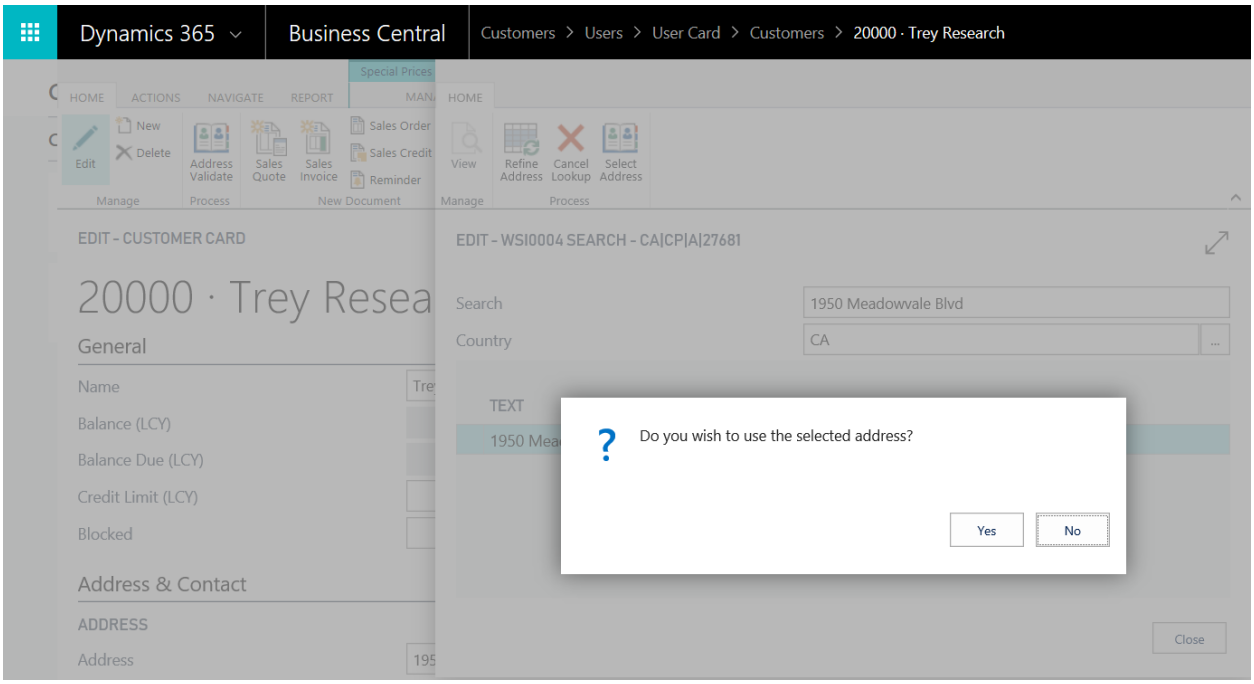


If you are satisfied that the correct address has been selected and you wish to update the customer address information with the address information provided from this service, press the Select Address action.



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

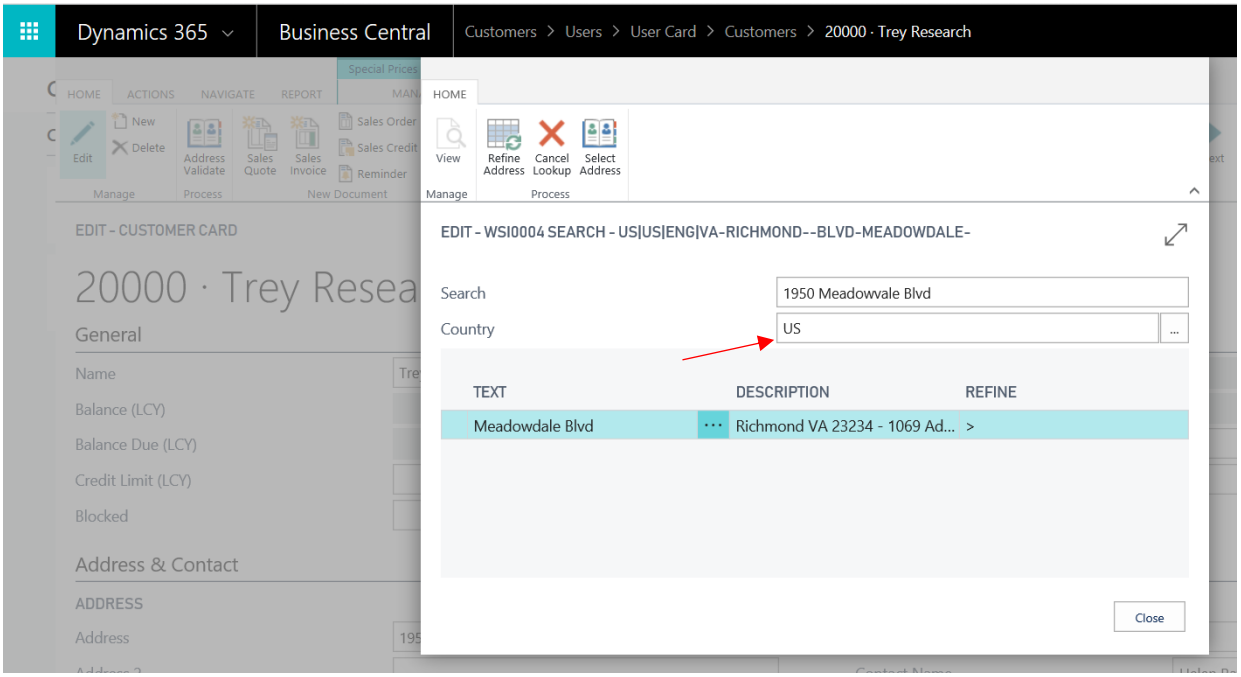




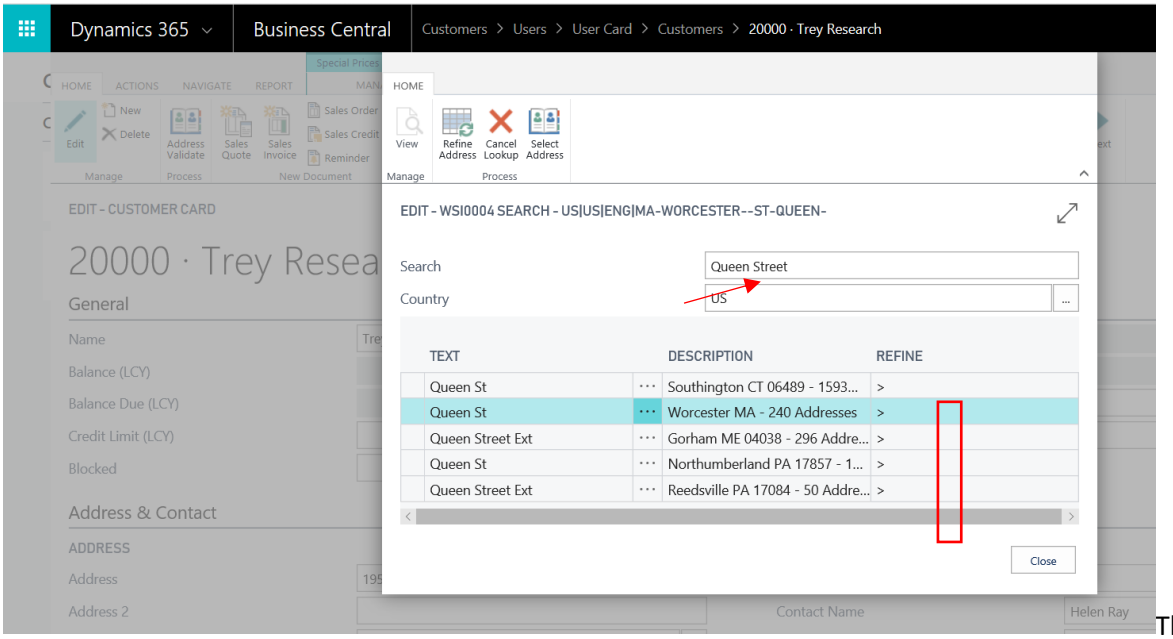
If you choose No, the address information will not be updated within Dynamics 365 Business Central and your API key will not be charged for a lookup. Selecting Yes will update the address information in Dynamics 365 Business Central based on the data provided from the CanadaPost AddressComplete API.

Revising Addresses

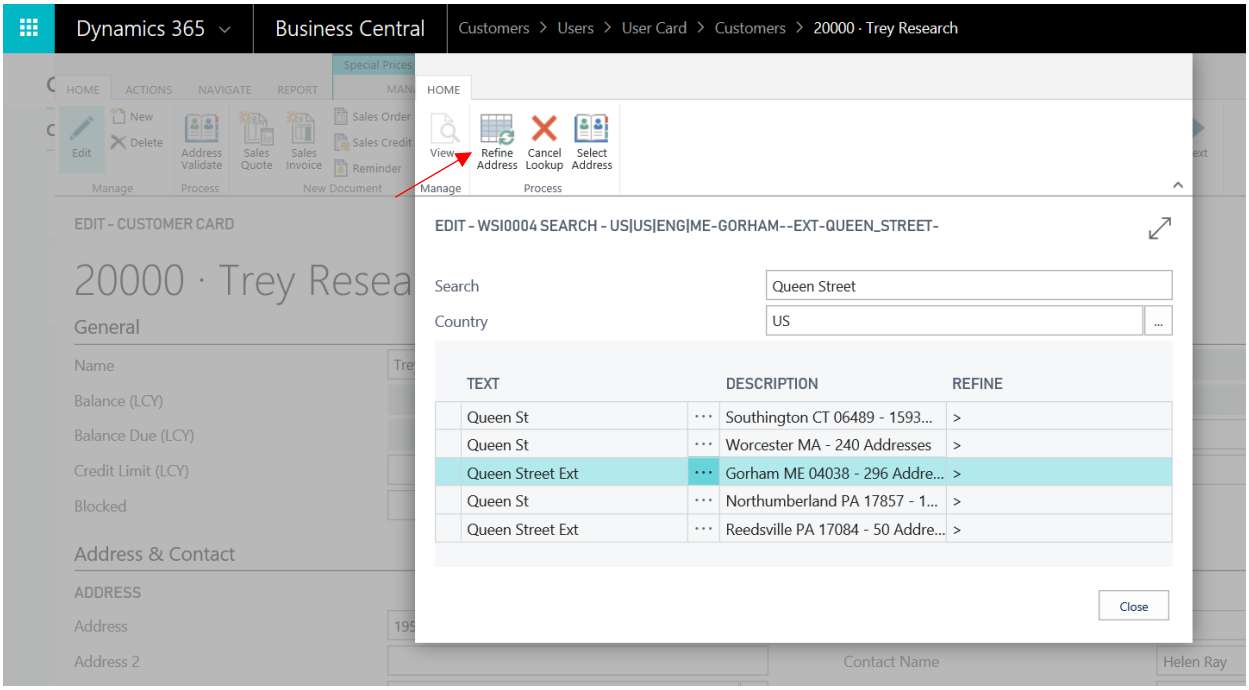
When you are on the AddressValidate page, you can adjust your search criteria. The Country is defaulted based on the address information provided by Dynamics 365 Business Central. But, you can change this to any country code defined in your Dynamics 365 Business Central environment. Let's try changing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

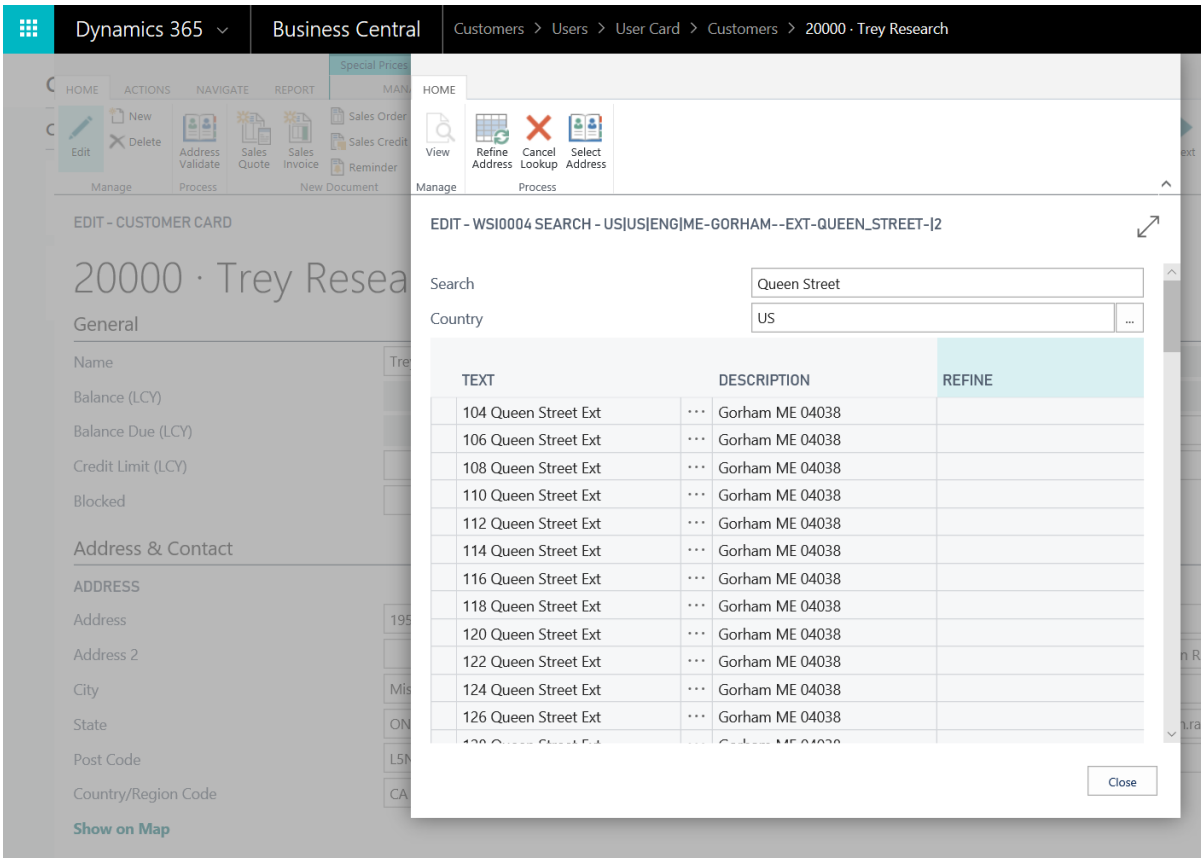


You are now presented with options to choose based on your Search string. Let's adjust the search string to be Queen Street.

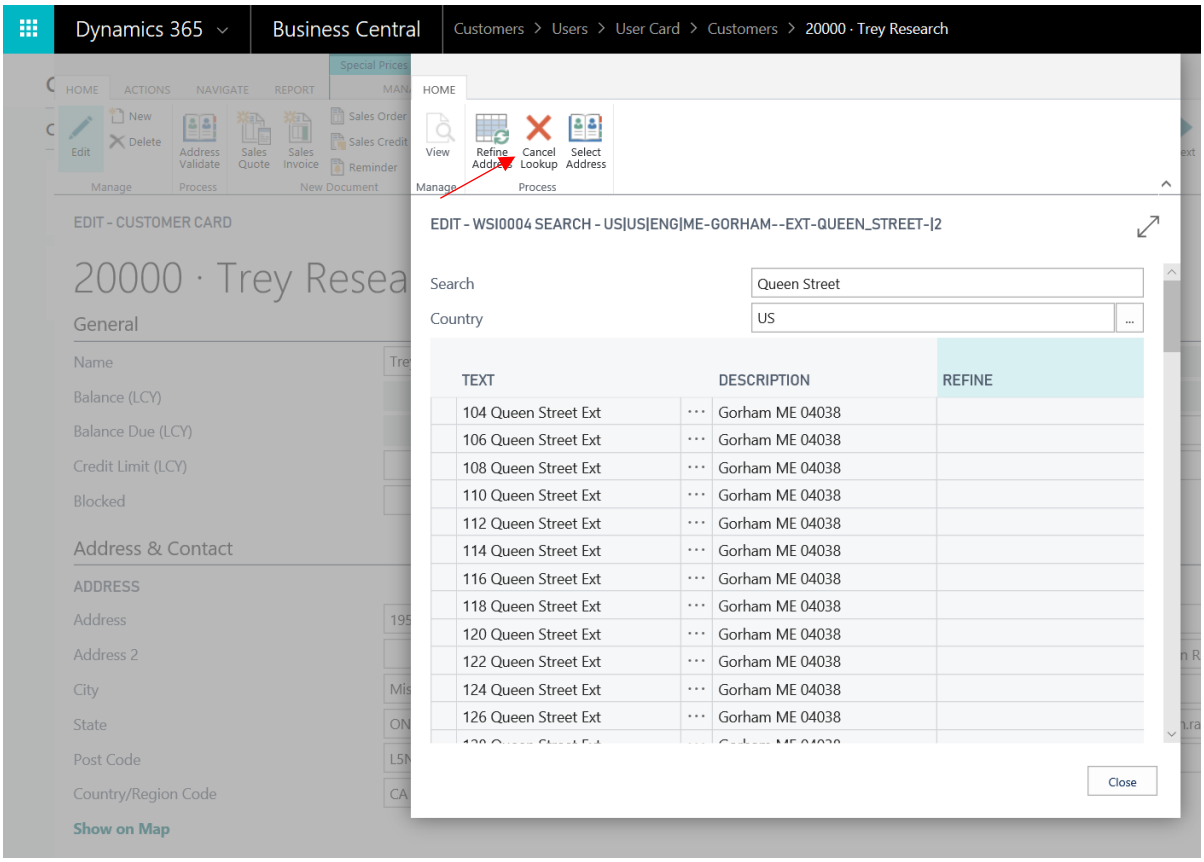


The Refine column becomes populated in this case. The refine column indicates that this address line displayed does not map to one specific address but a set of addresses. We will need to refine this information to get down to a single address. Choose the line that matches the address we want and press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

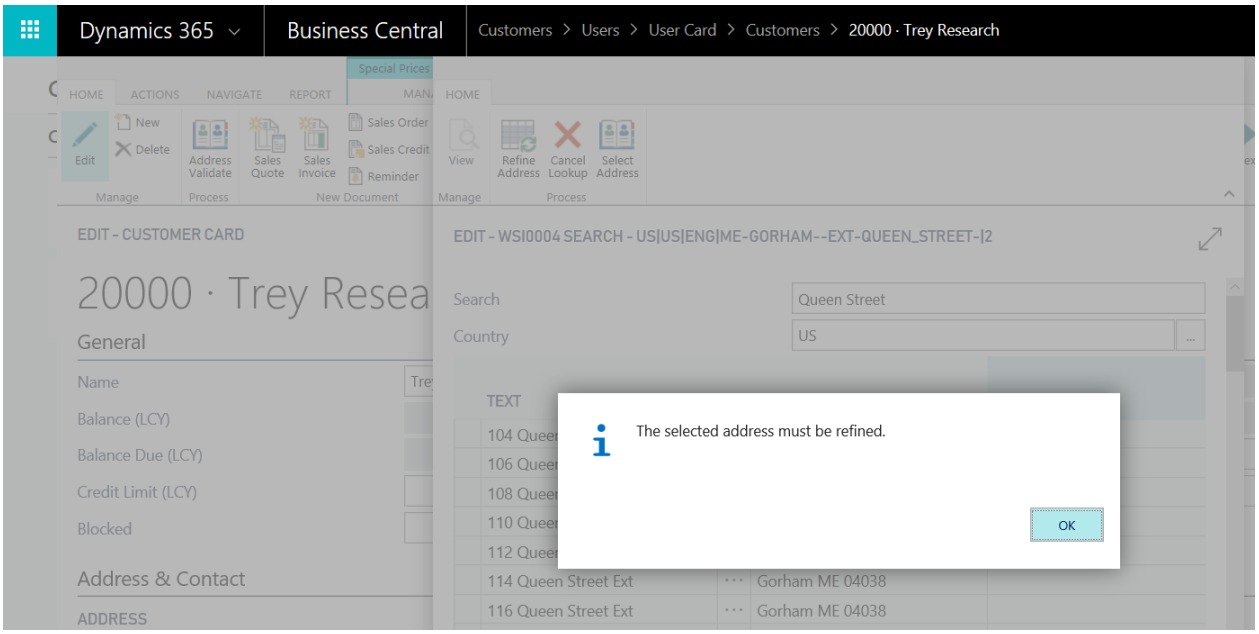

Dynamics 365
Business Central
Customers > Users > User Card > Customers > 20000 · Trey Research
HOME
View
Refine Address
Cancel Lookup
Select Address
Manage
Process
EDIT - WSI0004 SEARCH - US|US|ENG|ME-GORHAM--EXT-QUEEN_STREET-
Search
Queen Street
Country
US
TEXT
DESCRIPTION
REFINE
Queen St
Southington CT 06489 - 1593...
Queen St
Worcester MA - 240 Addresses
Queen Street Ext
Gorham ME 04038 - 296 Addre...
Queen St
Northumberland PA 17857 - 1...
Queen Street Ext
Reedsville PA 17084 - 50 Addre...
Close
EDIT - CUSTOMER CARD
General
Address & Contact
ADDRESS
Address
Address 2
Contact Name
Helen Ray

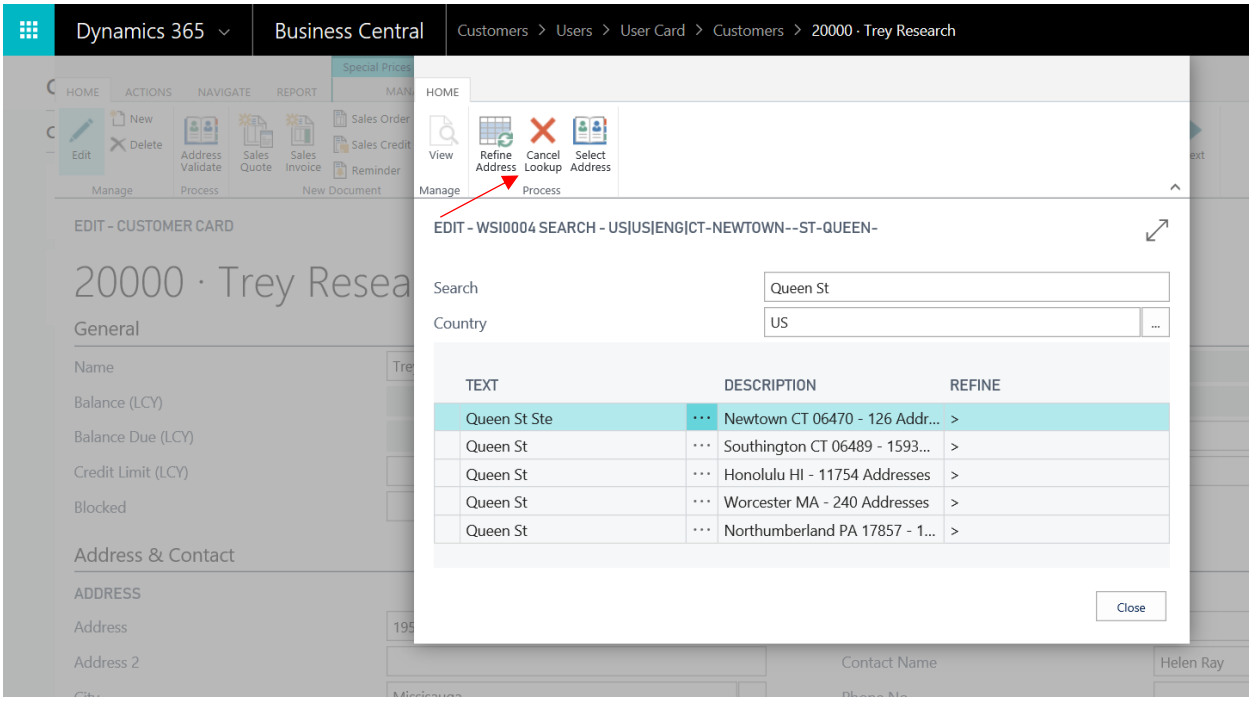


You will be presented with all address options that are available for the previously selected address. Either adjust the search parameter to begin a new address search or select the correct address. Press either the Select Address option to choose this address or click the Cancel Lookup to cancel your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

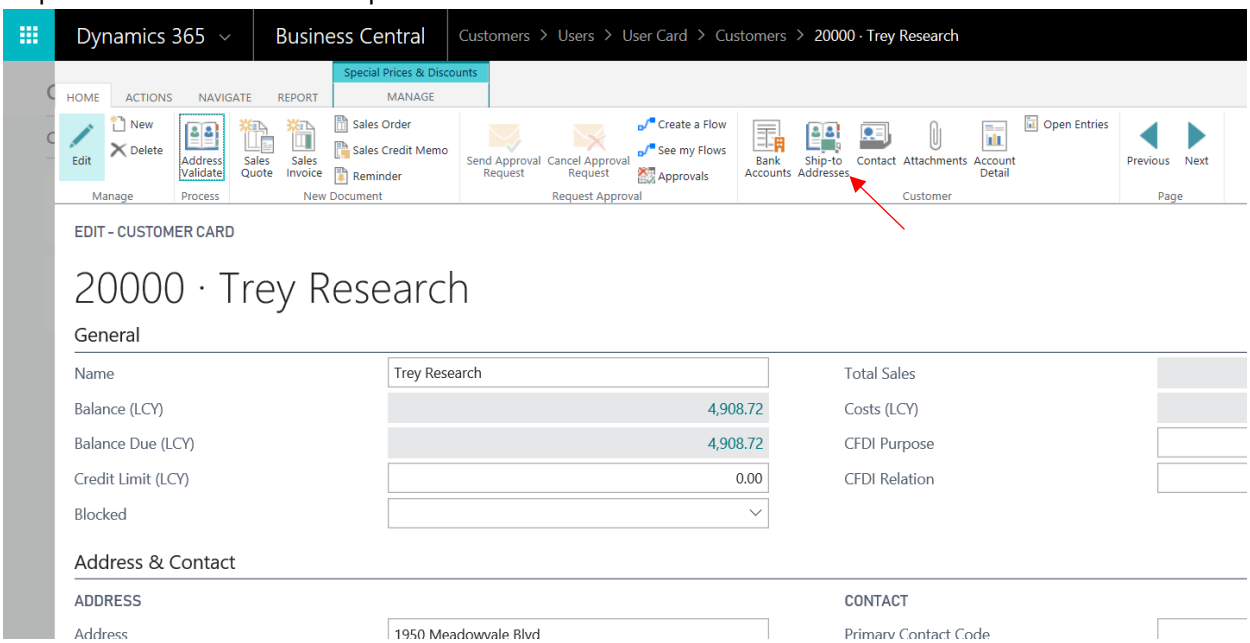


Note: You will not be able to click the close button if you have a “refine” address selected. If you want to close the page without looking up an address press the Cancel Lookup action. Otherwise, press refine address to refine the address.

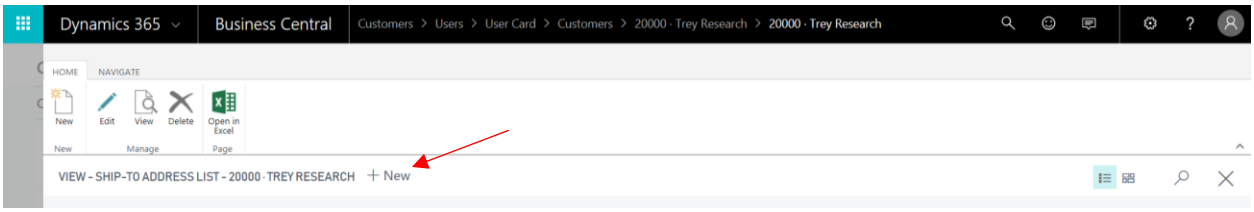

Dynamics 365
Business Central
Customers > Users > User Card > Customers > 20000 · Trey Research
EDIT - CUSTOMER CARD
20000 · Trey Resea
General
Name
Balance (LCY)
Balance Due (LCY)
Credit Limit (LCY)
Blocked
Address & Contact
ADDRESS
EDIT - WSI0004 SEARCH - US|US|ENG|ME-GORHAM--EXT-QUEEN_STREET-|2
Search
Queen Street
Country
US
TEXT
104 Queen
106 Queen
108 Queen
110 Queen
112 Queen
114 Queen Street Ext
Gorham ME 04038
116 Queen Street Ext
Gorham ME 04038
The selected address must be refined.
OK


Dynamics 365
Business Central
Customers > Users > User Card > Customers > 20000 · Trey Research
HOME
View
Refine Address
Cancel Lookup
Select Address
Manage
Process
EDIT - CUSTOMER CARD
20000 · Trey Resea
General
Address & Contact
ADDRESS
EDIT - WSI0004 SEARCH - US|US|ENG|CT-NEWTOWN--ST-QUEEN-
Search
Queen St
Country
US
TEXT
DESCRIPTION
REFINE
Queen St Ste
Newtown CT 06470 - 126 Addr...
Queen St
Southington CT 06489 - 1593...
Queen St
Honolulu HI - 11754 Addresses
Queen St
Worcester MA - 240 Addresses
Queen St
Northumberland PA 17857 - 1...
Close
Contact Name
Helen Ray

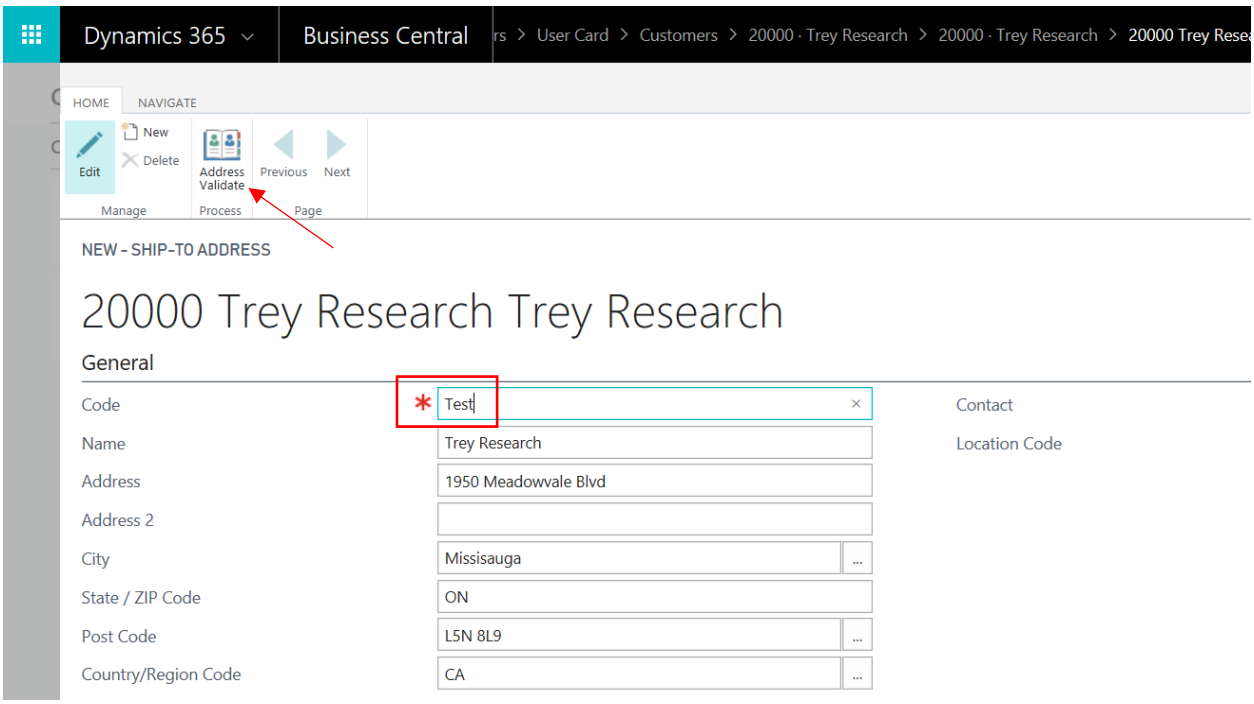
Ship-to Address – Press the ship-to Addresses action for the customer.



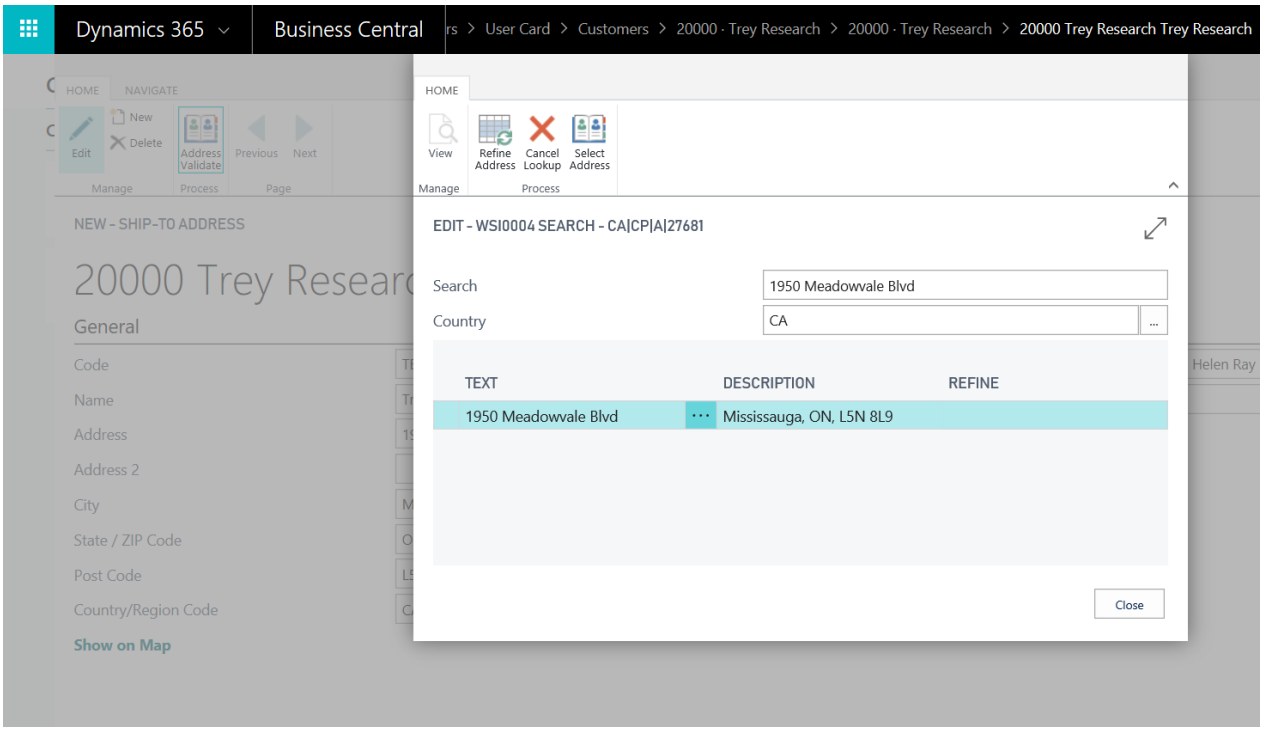
Create a new ship-to address



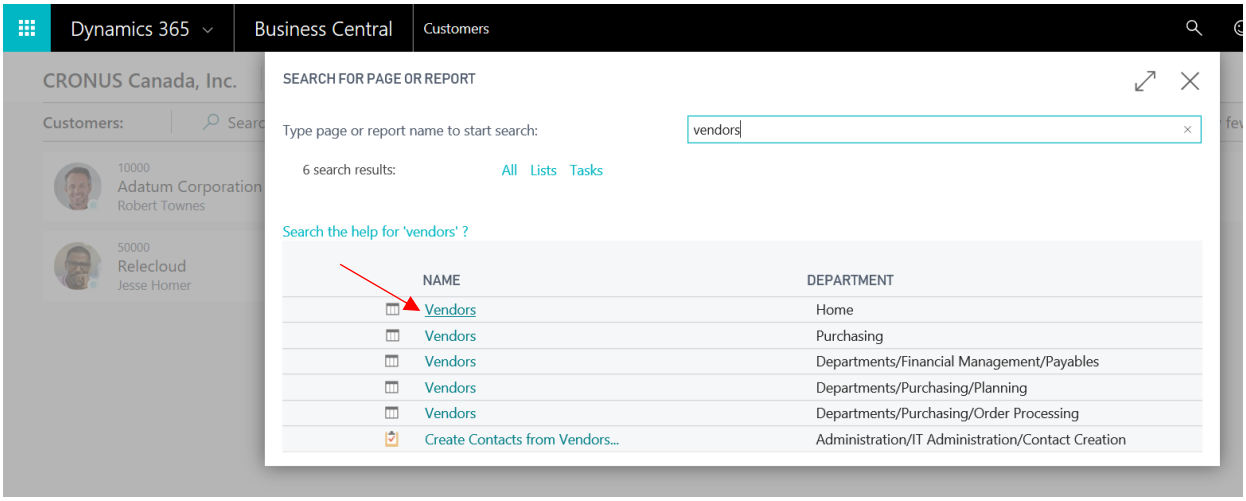
Enter a code for your ship-to address and press the Address Validate action.



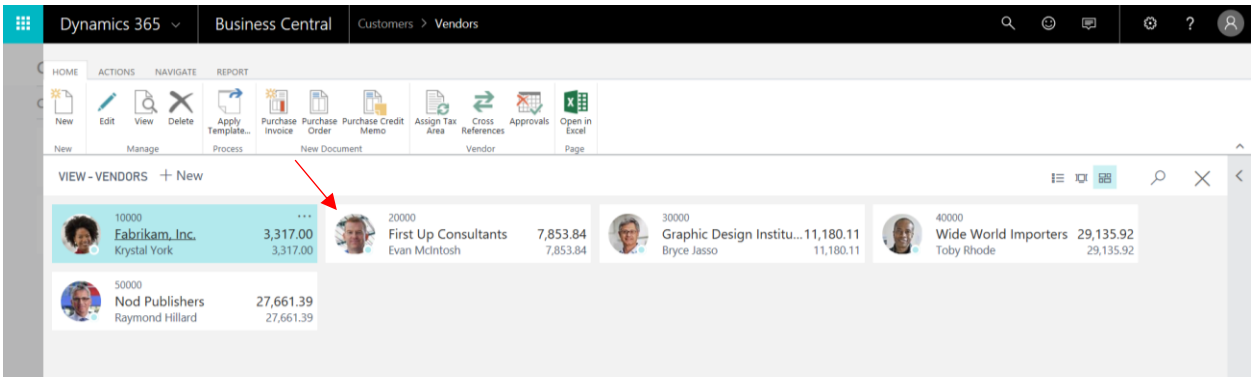
Search for and update your ship-to address as required.



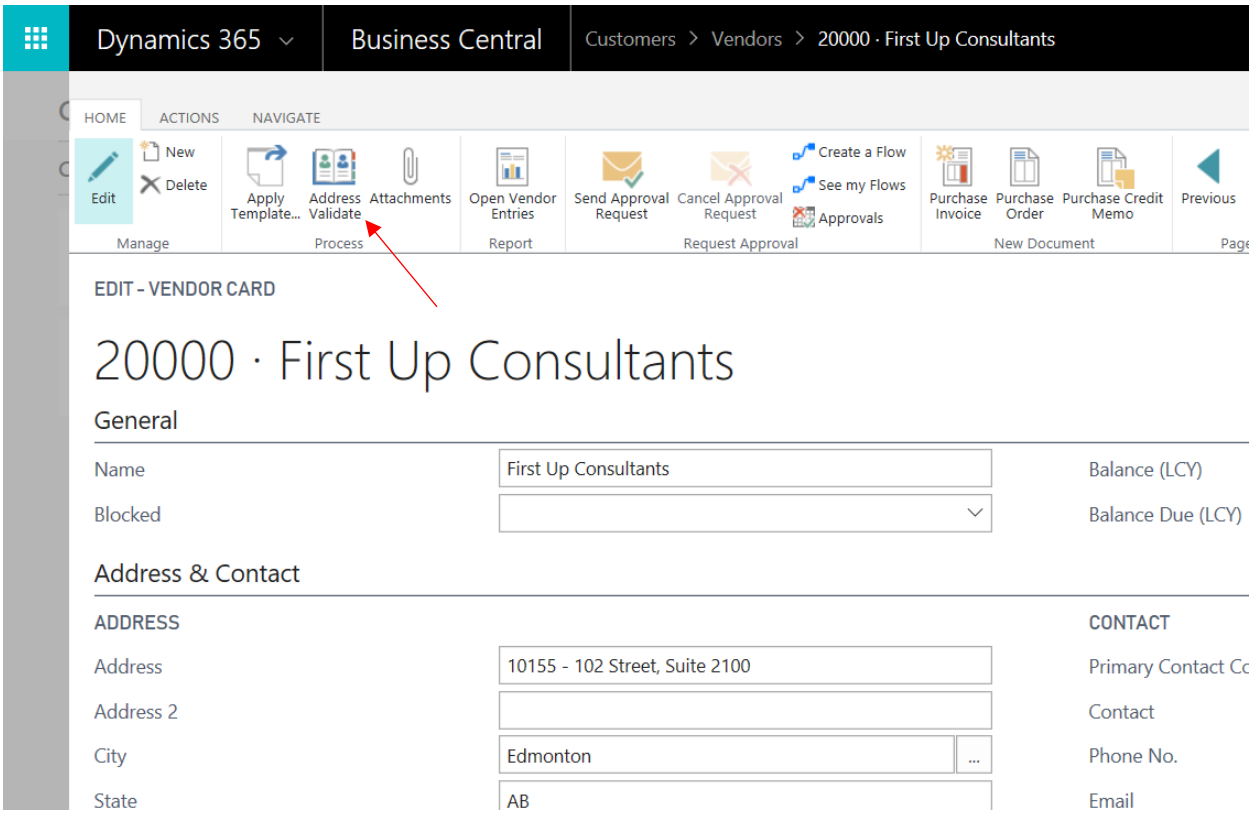
Vendor Address – Search using the magnifying glass for vendors.

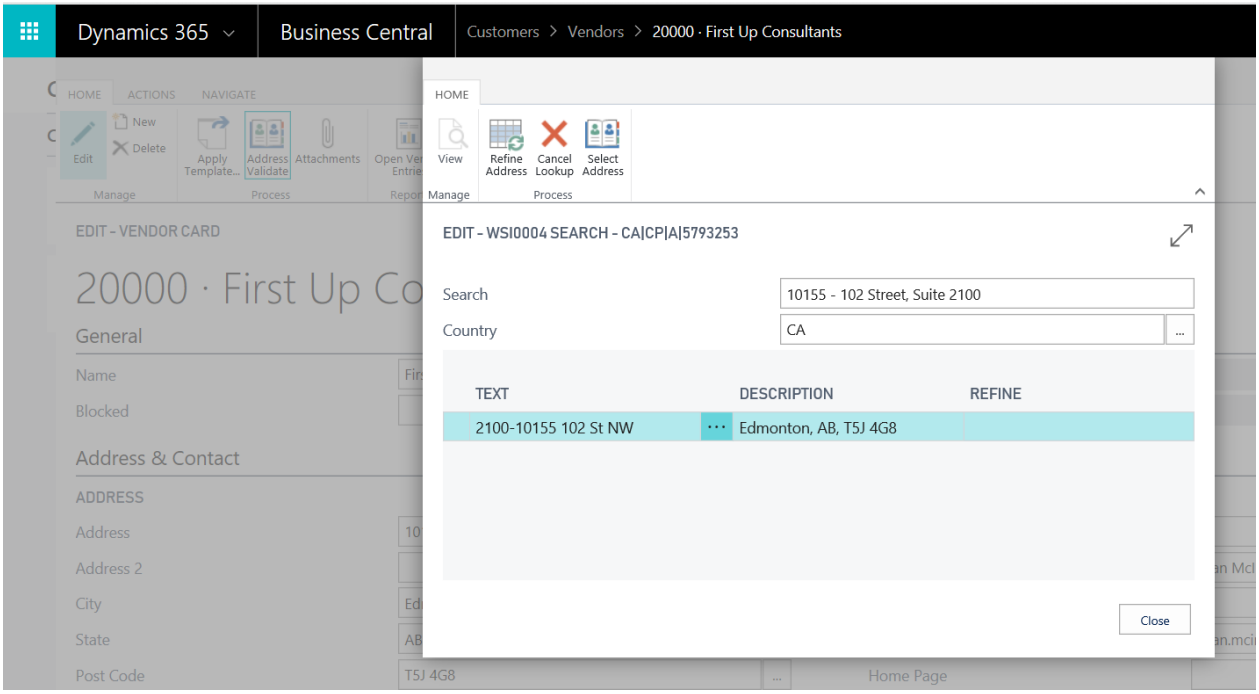


Press the vendor you are interested in.



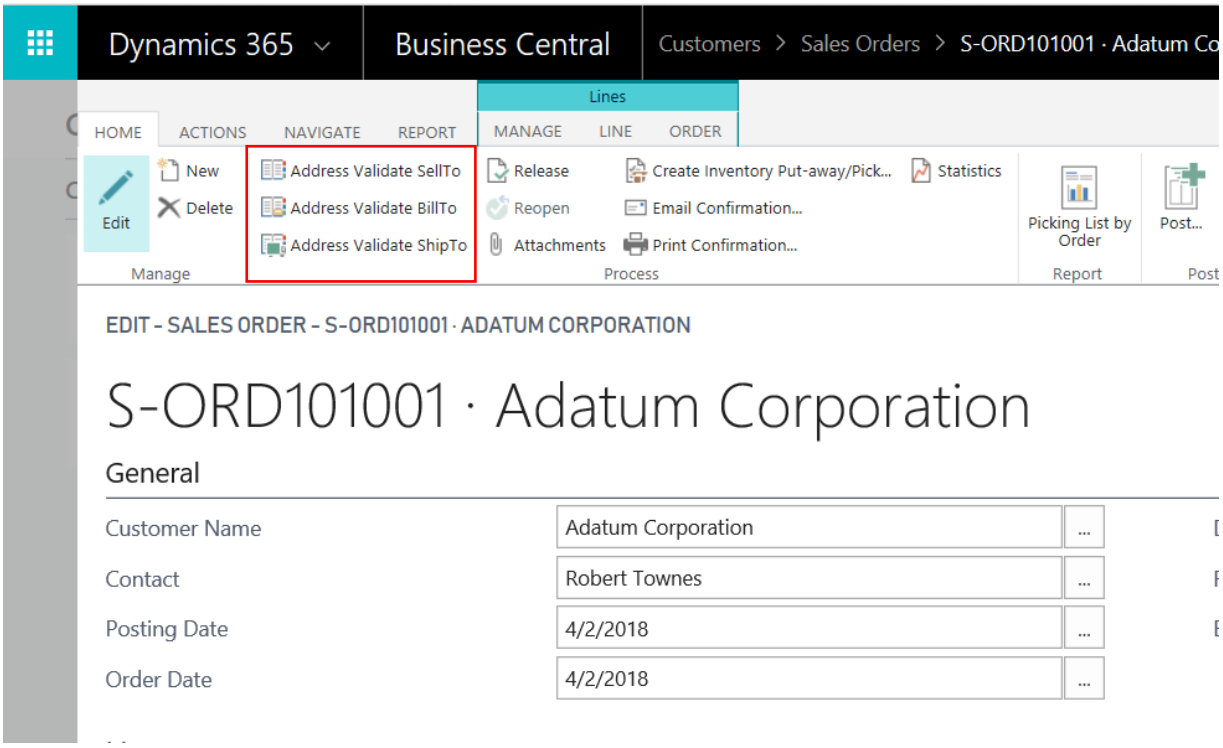
Press the Address validate action to validate the vendor address.

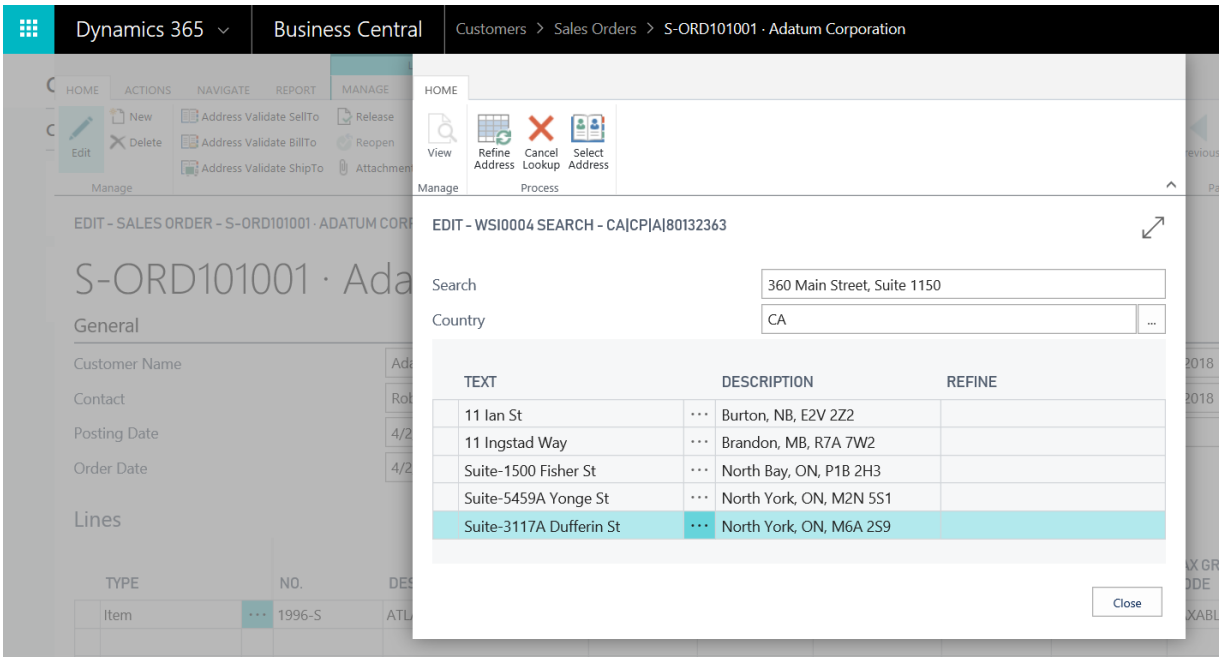

Dynamics 365
Business Central
Customers > Vendors > 20000 · First Up Consultants
HOME
ACTIONS
NAVIGATE
Edit
New
Delete
Apply Template...
Address Validate
Attachments
Open Vendor Entries
Send Approval Request
Cancel Approval Request
Create a Flow
See my Flows
Approvals
Purchase Invoice
Purchase Order
Purchase Credit Memo
Previous
Manage
Process
Report
Request Approval
New Document
EDIT - VENDOR CARD
20000 · First Up Consultants
General
Name
First Up Consultants
Blocked
Balance (LCY)
Balance Due (LCY)
Address & Contact
ADDRESS
Address
10155 - 102 Street, Suite 2100
Address 2
City
Edmonton
State
AB
CONTACT
Primary Contact Cc
Contact
Phone No.
Email

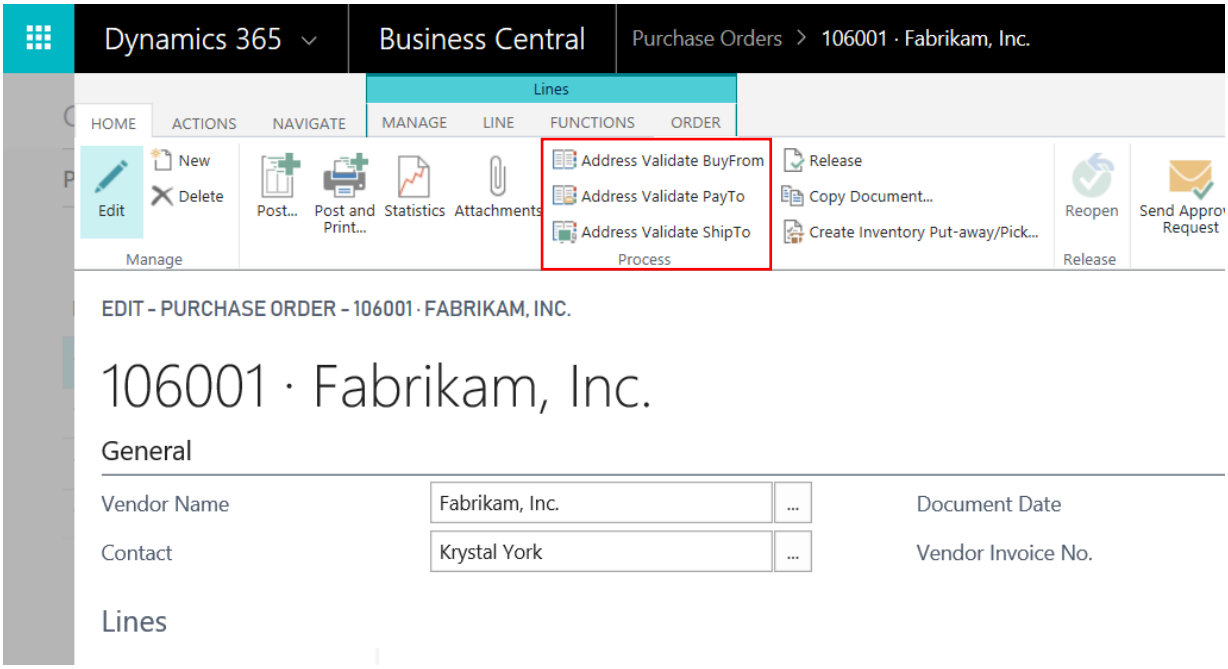

Dynamics 365
Business Central
Customers > Vendors > 20000 · First Up Consultants
HOME
View
Refine Address
Cancel Lookup
Select Address
Manage
Process
EDIT - WSI0004 SEARCH - CA|CP|A|5793253
Search
10155 - 102 Street, Suite 2100
Country
CA
TEXT
DESCRIPTION
REFINE
2100-10155 102 St NW
Edmonton, AB, T5J 4G8
Close

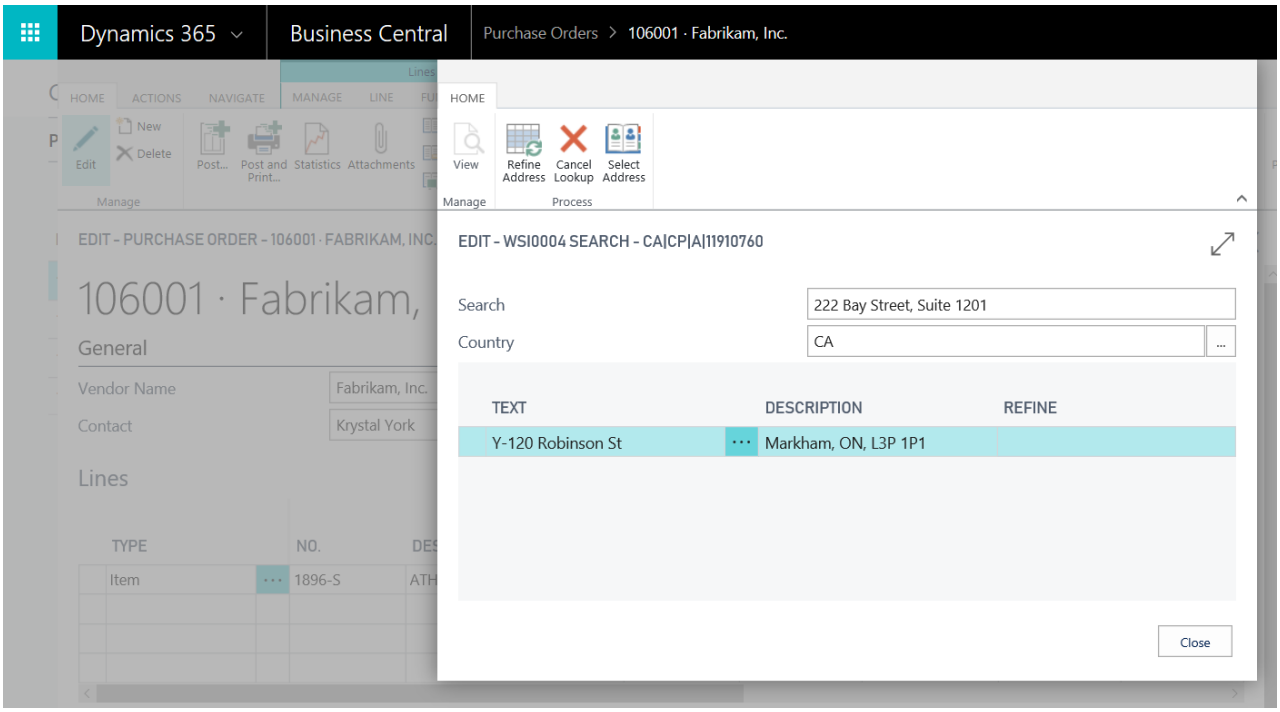
Sales Quote, Sales Order, Sales Invoice, Sales Credit Memo & Purchase Order, Purchase Invoice, Purchase Credit Memo.

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.






Dynamics 365
Business Central
Purchase Orders > 106001 · Fabrikam, Inc.
Lines
HOME
ACTIONS
NAVIGATE
MANAGE
LINE
FUNCTIONS
ORDER
Edit
New
Delete
Post...
Post and Print...
Statistics
Attachments
Address Validate BuyFrom
Address Validate PayTo
Address Validate ShipTo
Release
Copy Document...
Create Inventory Put-away/Pick...
Reopen
Send Approval Request
Manage
Process
Release
EDIT - PURCHASE ORDER - 106001 · FABRIKAM, INC.
106001 · Fabrikam, Inc.
General
Vendor Name
Fabrikam, Inc.
Contact
Krystal York
Document Date
Vendor Invoice No.
Lines


Dynamics 365
Business Central
Purchase Orders > 106001 · Fabrikam, Inc.
HOME
View
Refine Address
Cancel Lookup
Select Address
Manage
Process
EDIT - WSI0004 SEARCH - CA|CP|A|11910760
Search
222 Bay Street, Suite 1201
Country
CA
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DESCRIPTION
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Markham, ON, L3P 1P1
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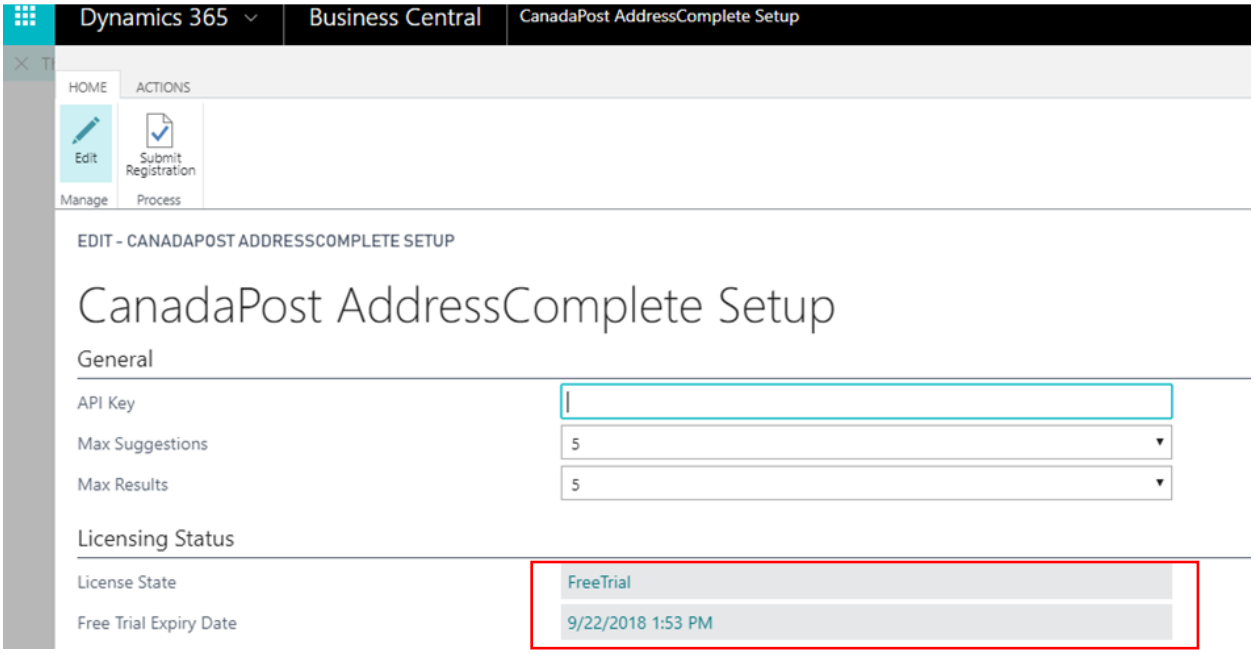
You will get access to our CanadaPost AddressComplete Dynamics 365 free for 30 days. If you would like to view the free trial expire date, search for CanadaPost AddressComplete Setup in the search bar.



Contact accounting@websan.com or 416-499-1235, when you're ready to purchase our app.