

<u>Setup & Usage for "CanadaPost for Small</u> Business" App

If you would like to purchase our app, scroll to the bottom of the page.

Setup

1. Assign User App Permissions by using the search function and typing "users" in the search field.

Dynamics 365 ∨ B	usiness Central				م	0
CRONUS Canada, Inc.	SEARCH FOR PAGE OR REPORT			2	\times	
Customers Vendors Items	Type page or report name to start search:	us	ers		×	
HEADLINE	2 search results: All Li	sts				
Hi!	Search the help for 'users' ?					ash etai
	NAME		DEPARTMENT			
	Users		Administration/IT Administ	tration/General		
• 0	ADCS Users		Application Setup/Wareho	use/ADCS		
Activities						
SALES THIS MONTH						
\$2,863	\$100,936	\$79,148				
> See more	> See more	> See more				
ONGOING SALES	ONGOING PUR	CHASES	PAYMENTS	11	NCOMING	
SALES QUOTES SALES ORDER	RS SALES PURCHASE	ONGOING PUR	PURCH. INVOI UNPROCESSED			

2. Drill into user.

	Dynamics 365 🗸	Business Central	Users		
((HOME ACTIONS NAVIGATE	New Edit Manage		Open in Excel Page	
	USER NAME DEMOUSER	FULL N	AME	STATE	



3. Add WS-CNDPOST permission set.

PERMISSION SET LOOKUP			, A K
ROLEID	NAME	EXTENSION NAME	
D365PREM SMG, EDIT	D365 Service Management Edit		\sim
D365PREM SMG, SETUP	D365 Service Management Setup		
D365PREM SMG, VIEW	D365 Service Management View		
LOCAL	Country/region-specific func.		
SECURITY	Dynamics 365 User setup		
SUPER	This role has all permissions.		
ANONYM. DATA SHARER	Anonymous Data Sharer	_Exclude_AnonymizedDataSharing_	
QBDATAMIGRATION	QB Data Migration Permissions	QuickBooks Data Migration	
ESSENTIALBUSINESSHEA	Essential Business Headlines	Essential Business Headlines	
LATE PAYMENT PREDICT	Late payment predictor	_Exclude_Late Payment Predictor_	
QUICKBOOKSDESKTOPSYN	QuickBooks Desktop Synchroniza	_Exclude_QuickBooksDesktopSynchronization_	
WS-CNDPOST	CanadaPost SB Integration	CanadaPost for Small Business	
QBODATAMIGRATION	QBO Data Migration Permissions	QuickBooks Online Data Migration	
DYNAMICSGPDATAMIGRAT	Dynamics GP Data Migration	Dynamics GP Data Migration	
SALESANDINVENTORYFOR	Sales And Inventory Forecast	Sales and Inventory Forecast	
AZUREEVENTEMITTER	AzureEventEmitter Permissions	_Exclude_AzureEventEmitter_	
PAYPALSTANDARD	MSWallet Permissions	Microsoft Pay	
IMAGE ANALYZER	Image Analyzer	Image Analyzer	~

4. Navigate to Assisted Setup.

	Dynamics 365 ${\scriptstyle \lor}$	Business Central		م	٢
(CRONUS Canada, Inc.	SEARCH FOR PAGE OR REPORT	\mathbb{Z}	\times	
(Eustomers Vendors Ite	Type page or report name to start search: assisted			
	HEADLINE	2 search results: All Lists			
	Hi!	Search the help for 'assisted' ?			ash Flov etained
		NAME DEPARTMENT			
		Assisted Setup Setup & Extensions			
	0	Administration/Application Setup/General			
	Activities				
	SALES THIS MONTH				
	\$2 863	\$100 936 \$79 148			



5. Launch CanadaPost Integration Setup

Dynamics 365 v Business Central Assisted Setup	
HOME ACTIONS	
VIEW - ASSISTED SETUP	
NAME	STATUS
Migrate business data	Not Completed
Set up sales tax	Completed
Set up cash flow forecast	Completed
Set up approval workflows	Not Completed
Set up a customer approval workflow	Not Completed
Set up email	Not Completed
Set up email logging	Not Completed
Set up your Business Inbox in Outlook	Not Completed
Set up reporting data	Not Completed
Set up an item approval workflow	Not Completed
Set up a payment approval workflow	Not Completed
Set up Dynamics 365 for Sales connection	Not Completed
Invite External Accountant	Not Completed
Set up consolidation reporting	Not Completed
CanadaPost Integration Setup	··· Not Completed

6. Click Next to begin setup.

	Dynamics 365 ${\scriptstyle \lor}$	Business Central	Assis	sted Setup	
C				WS10001 CP SETUP WIZARD	
	VIEW - ASSISTED SETUP			WELCOME TO THECANADAPOST INTEGRATION SETUP WIZARD FOR SMALL BUSINESS CUSTOMERS.	
ŀ	NAME			To be able to use the CanadaPost integration you need to specify your setup information.	
ļ	Migrate business data			LET'S GO!	1
	Set up sales tax			Choose Next so you can specify your CanadaPost for small business setup information.	(
	Set up cash flow forecast				(
	Set up approval workflows				1
•	Set up a customer approval v	workflow			1
A					1
S					1
(Set up your Business Inbox in	n Outlook			1
-	Set up reporting data				1
-		kflow			1
	Set up a payment approval w	vorkflow		Back Next Finish	1
0					Ν



7. Click the link to register for CanadaPost Developer Program.

	Dynamics 365 🗸	Business Central	Assisted Setup			
C	HOME ACTIONS		WSI0001 CP SETUP WIZ	ZARD	∠ ×	
	VIEW - ASSISTED SETUP		SPECIFY YOUR CANAL	DAPOST SETUP INFORMATION		
			CndPostDeveloper	Register for CanadaPost De	eveloper Program	
ŀ	NAME		Mode	Test	∽ STA	TUS
- I	Migrate business data				Not	Con
	Set up sales tax		Test User		Com	nple
	Set up cash flow forecast		Test Pwd		Com	nple
	Set up approval workflows		Production User		Not	Con
0	Set up a customer approval w	orkflow	Production Pwd		Not	Con
A	Set up email				Not	Con
S	Set up email logging				Not	Con
(Set up your Business Inbox in	Outlook			Not	Con
	Set up reporting data				Not	Con
-	Set up an item approval work	flow			Not	Con
	Set up a payment approval wo	orkflow		Back	Next Finish Not	Con
0	Set up Dynamics 365 for Sales				Not	Con



 This will launch the CanadaPost website where you will be provided instructions for signing up & joining the developer program. This will allow you to receive your API keys for calling CanadaPost services directly inside of Dynamics 365 Business Central.

🗲 🛞 🖻 https://www.canadapost.ca/cpo/mc/business/productsservices/develope 🔎 🛪 🔒 🖒	🧭 View - Assisted Setup - Dynam 👂 Canada Post Developer Pro 🗙
	및 CART SIGN IN FRANÇAIS
CANADA SPOSTES POST	Managing Mail Sending Business Solutions Tools Shop Support $\mathbb Q$
Developer Program Solution Providers	Getting Started Print Ready to join the Canada Post Developer Program? Here's how to get started.
Service Directory Rating Contract Shipping Non-Contract Shipping	1 > Sign in or sign up If you already have a Canada Post username and password, Sign in to the Canada Post website. Need a username and password? Sign up now.
Tracking Find a Post Office Deliver to Post Office Pickup Returns	2 > Join the Developer Program Once you've signed in to our websile, select Join Now. Read and accept the terms and conditions of the Program to become a member.
E-commerce Platforms AddressComplete Service Info	3 Set your API keys API keys are unique codes that identify your application each time it makes a call to one of our services. Once your e a member of our Developer Program and are signed in to the Canada Post website, your keys will be displayed on the main Developer Program page.
Getting Started Vuse Cases	You will get 2 keys: one for development and one for production. For specifics on how to use your keys refer to the REST Fundamentals of Canada Post Web Services or SOAP Fundamentals of Canada Post Web Services.

9. The API keys and customer number are displayed on the Developer program page. Please take note of the key number from your company name along with the username & password for both development & production. You will need to enter this information into the CanadaPost Setup in Dynamics 365.

elcome	My Profile My Support Dashboard				
ompany:					
- WEBSAN	I SOL	UTIONS INC-	Select		
Developer Program		API Keys			
		ALINCYS			
Solution Providers	۶.	Name	Key Number (username : password)	Status	New Passkey
	÷	-	Key Number (username : password)	Status Active	New Passkey Regenerate
Solution Providers	•	Name	Key Number (username : password)		
Solution Providers Service Directory	•	Name Development	Key Number (username : password)	Active	
Solution Providers Service Directory Rating	•	Name	Key Number (username : password)		



10. The Development username and password are entered into the: Test User & Test Pwd fields in Dynamics 365. Note that the Development and Production username and password to be used are the key numbers outlined in the previous step (see screen above for reference). The Production username & password are entered into the: Product User & Production Pwd fields. Select the mode of operation. Test is used for testing the application. You will not be charged by CanadaPost while in this mode. In production, you are responsible for any charges generated. Select Next to continue.

	Dynamics 365 v	Business Central	Sales Orders > Assisted Setup		
С	HOME ACTIONS		WSI0001 CP SETUP WIZARD	Ľ	? X
s	VIEW - ASSISTED SETUP		SPECIFY YOUR CANADAPOST	SETUP INFORMATION	- 1
			CndPostDeveloper	Register for CanadaPost Developer P	rogram
	NAME		Mode	Test	\sim
	Migrate business data				
	Set up sales tax		Test User	•••••	
	Set up cash flow forecast		Test Pwd	•••••	- 1
	Set up approval workflows		Production User	•••••	
	Set up a customer approval v	vorkflow	Production Pwd	•••••	
	Set up email logging				- 1
	Set up your Business Inbox ir	Outlook			- 1
	Set up reporting data			$\overline{\}$	_
	Set up an item approval work	cflow			
	Set up a payment approval w	vorkflow		Back Next	Finish



11. Enter your CanadaPost Small Business Customer No. The combination of your unique API keys & customer number allows communication with CanadaPost services. The notification email is used by CanadaPost to send notifications based on the selected notify options. The shipping charge type and charge are used when adding the CanadaPost shipping charge back to an associated sales order. The Label options are used to specify if you want specific data to show on your shipping label depending on the selected options.

	Dynamics 365 🗸	Business Central	Sales	Orders > Assisted Setup		
C	HOME ACTIONS			WSI0001 CP SETUP WIZARD		∠ ×
S	VIEW - ASSISTED SETUP			SPECIFY YOUR CANADAPOST INTE	GRATION OPTIONS.	~
				Small Business Customer No.	123456789	
	NAME			Origin Postal Code	M2J4T1	
	Migrate business data					
	Set up sales tax			Notification E-Mail	test@cronus.com	
	Set up cash flow forecast			Notify On Shipment	\checkmark	
	Set up approval workflows			Notify On Exception		
	Set up a customer approval v	vorkflow		Notify On Delivery		- 8
	Set up email			Shipping Charge Type	G/L Account	~
	Set up email logging			Shipping Charge	10.00	
	Set up your Business Inbox ir	n Outlook				
	Set up reporting data			Label - Show Packing		
	Set up an item approval worl	kflow				~
	Set up a payment approval w	vorkflow			Back Next	Finish
	Set up Dynamics 365 for Sale	es connection				_



12. Click Next to continue.

Dynamics 365 V	Business Central	Sales	Orders > Assisted Setup		
C HOME ACTIONS			WSI0001 CP SETUP WIZARD		ZX
S VIEW - ASSISTED SETUP			Origin Postal Code	M2J4T1	
NAME			Notification E-Mail	test@cronus.com	_
Migrate business data			Notify On Shipment		
Set up sales tax			Notify On Exception		
Set up cash flow forecast			Notify On Delivery		
Set up approval workflows					
Set up a customer approval wor	cflow		Shipping Charge Type	G/L Account	<u> </u>
Set up email			Shipping Charge	10.00	
Set up email logging			Label - Show Packing		
Set up your Business Inbox in Ou	ıtlook		Label - Show Rate		
Set up reporting data			Label - Show Insured		
Set up an item approval workflo	N				
Set up a payment approval work	flow			Back Next	Finish

You have completed the setup of the CanadaPost for Small Business app. Click Finish to exit the wizard.

	Dynamics 365 ${\scriptstyle \lor}$	Business Central	Sales	Orders > Assisted Setup				
C	HOME ACTIONS			WSI0001 CP SETUP WIZARI	D		\checkmark	\times
S	VIEW - ASSISTED SETUP			THAT'S IT! Choose Finish to complete	the Canadapc	ost integration setup.		
	NAME			HelpLbl		To learn more about the Can	adapost inte	egr
	Migrate business data							
	Set up sales tax							_
	Set up cash flow forecast							
	Set up approval workflows							_
	Set up a customer approval v	vorkflow						
	Set up email							_
	Set up email logging							
	Set up your Business Inbox in	n Outlook						
	Set up reporting data							_
	Set up an item approval work	kflow						_
	Set up a payment approval w	vorkflow				Back	ext Fi	nish



13. We want to setup a standard box size for our company. This can speed up the process of generating quote requests. Search for the CanadaPost Default Packages page.

 Dynamics	365 ~	Business Central	Sales Orders			۹	
CRONUS Cai	nada, Inc.	SEARCH FOR PAGE C	RREPORT		2	\times	
Sales Orders:	All	C S Type page or report	name to start search:	canadapost default			
		1 search results:	All Lists				I
NO.	SELL-TO C						
		Search the help for 'o	canadapost default' ?				vł
	Adatum Co	rpor	NAME	DEPARTMENT			se n
	School of F	ine A	CanadaPost Default Packages	Departments/CanadaPost for Small Business			
	Alpine Ski I	Hous					ic
							I
		-			_	_	

14. Click new to create a new default package. Click the X to save and close the new default package.

III Dynamics 365 🗸	Business Central Sales Orders > DEFAUL	LT SIZE		م	٩	⊕ ?
Сноме						
S Edit Delete						
VIEW - CANADAPOST DEFAUL	TPACKAGES					
	17F					
DEFAULT S	IZE					
DEFAULT S General Package Name	IZE DEFAULT SIZE		Unpackaged			
General			Unpackaged Coverage Amount			
General Package Name		30.00				
General Package Name Description		30.00	Coverage Amount			



Usage

1. Let us create a new CanadaPost Quote request for an existing order. Navigate to Sales Orders.

Dynamics	s 365 🗸 🛛 B	usiness Central	Sales Orders		Q
CRONUS Ca	nada, Inc.	SEARCH FOR PAGE C	RREPORT		$ \ \ \ \ \ \ \ \ \ \ \ \ \$
Sales Orders:		Type page or report	name to start search:	sales orders	×
		14 search results:	All Lists Reports and	Analysis Tasks	
NO.	SELL-TO CUSTO				
		Search the help for 's	ales orders' ?		
	Adatum Corpor		NAME	DEPARTMENT	
	School of Fine A		Sales Orders	Home	
	Alpine Ski Hous		Sales Orders	Sales	
			Blanket Sales Orders	Sales	
			Sales Return Orders	Sales	
			Sales Orders	Departments/Sales & Marketing/Order Proc	essing
			Blanket Sales Orders	Departments/Sales & Marketing/Order Proc	essing
			Sales Return Orders	Departments/Sales & Marketing/Order Proc	essing
			Inventory - Sales Back Orders	Sales & Marketing/Inventory & Pricing/Repo	orts

2. Choose the Sales Order you wish to create a quote request for.

	Dynamics 3	65 ~ Busine	ess Cer	ntral Sale	es Orders > Sa	ales Orders					
C	HOME ACTIONS	NAVIGATE REPORT									
S	New Edit Vie	ew Delete Sales Reserva Avail.	ation App	rovals Open in Excel							
	New Man	RDERS + New	On	der Page							\times
	NO.	SELL-TO CUSTOMER	NAME	EXTERNAL DOCUMEN NO.	LOCATION CODE	DOCUME DATE	COM SHIPPE	AMOUNT SHIPPED NOT INVOICED (LCY)	AMOUNT SHIPPED NOT INVOICED (LCY) INCL. VAT	AMOUNT	INCLU
	S-ORD1010 ···	Adatum Corporation				4/2/2018	No	0.00	0.00	25,189.2) 2
	S-ORD1010	Adatum Corporation				5/1/2018	No	0.00	0.00	3,432.5)
	S-ORD1010	School of Fine Art				4/22/2018	No	0.00	0.00	7,785.6)
	S-ORD1010	Alpine Ski House				5/13/2018	No	0.00	0.00	856.5)



3. Choose the CanadaPost button.

	Dynamics	365 ~	Busine	ess Centi	ral	Sales Or	rders > Sales C	rders > S-O	RD1010(01 · Ada	tum Corporatio
C 	HOME ACTIONS				Lines LINE		mail Confirmation rint Confirmation				
_	Edit	Canada Relea Post	ise Reopen A	ttachments Cr Pu Proce	ut-away/	entory	tatistics	Picking List by Order Report	Post Post	Post and Send	Send Approval Cai Request
	EDIT - SALES 0			DATUM COF	RPORA		Corpo				<u> </u>
	General										
1	Customer Nam	ie		A	datum	Corporatio	on				Due Date
	Contact			Ro	obert T	ownes					Requested
	Posting Date			4/	/2/2018	3					External Do
	Order Date			4/	/2/2018	3					

4. This will create a new Quote Request for this Sales Order. The shipping data from the order is automatically pulled into the quote request for you to speed the quote creation process.

-	Dynamics 365 \vee 🛛 Business Ce	Sales Orders > Sales Orders > S-ORD10100	1 · Adatum Corporation > 1	Q 😳 🛡	• ?	8
C	HOME ACTIONS MANAGE					
S	Delete Edit Submit Rate Create Non-Contract New Ca	anddoot Rate Request				^
	EDIT - CANADAPOST RATE REQUEST - 1					×_ <
	1					î.
	General					
	Document No.	S-ORD101001	Deliver To Post Office			
-	Promotion Code		Deliver To Post Office ID			
	Expected Mailing Date		Client Voice No.	12345678		
	Signature		Client E-Mail	robert@adatum.com]
	Proof of Age Required - 18		Origin Postal Code	M2J4T1		
	Proof of Age Required - 19		Destination Country	Canada	~]
	Card for Pickup		Destination Code	R3C3Z3		
	Do not Safe Drop		Quote Total		0.00	
	Leave at door					
	Shipping					
	Ship-To Contact	Robert Townes	Ship-to City	Winnipeg		
	Ship-To Name	Adatum Corporation	Ship-to State	MB		



5. All shipping must originate in Canada. You can ship to US as well as ship international. The general and shipping tabs allow you to specify one shipment transaction. The options will be restricted depending on which options you choose to select. For example, you cannot request to "Leave at door" if you have selected the Signature option.

Packages					
HOME ACTIONS MANAGE					
× / 🔉 🗈	≦ p				
Delete Edit Submit Rate Create Non-Cont Request Shipment	tract New CanadaPost Rate Request				
Manage Proces					
Mage has an error. Correct the error.	error or try to revert the change.				
EDIT - CANADAPOST RATE REQUEST	[-]				>
1					
1					
Conoral					
General					
Document No.	S-ORD101001	Deliver To	Post Office	V	
	S-ORD101001		Post Office Post Office ID	V	
Document No.	S-ORD101001		Post Office ID	12345678	
Document No. Promotion Code	S-ORD101001	Deliver To	Post Office ID ce No.		
Document No. Promotion Code Expected Mailing Date		Deliver To	e Post Office ID ce No. 1ail	12345678	
Document No. Promotion Code Expected Mailing Date Signature		Deliver To Client Voi Client E-N Origin Pos	e Post Office ID ce No. 1ail	12345678 robert@adatum.com	
Document No. Promotion Code Expected Mailing Date Signature Proof of Age Required - 18		Deliver To Client Voi Client E-N Origin Pos	o Post Office ID ce No. fail stal Code on Country	12345678 robert@adatum.com M2/4T1	
Document No. Promotion Code Expected Mailing Date Signature Proof of Age Required - 18 Proof of Age Required - 19		Deliver To Client Voi Client E-M Origin Pos Destinatio	o Post Office ID ce No. fail stal Code on Country on Code	12345678 robert@adatum.com M2J4T1 Canada	
Document No. Promotion Code Expected Mailing Date Signature Proof of Age Required - 18 Proof of Age Required - 19 Card for Pickup			o Post Office ID ce No. fail stal Code on Country on Code	12345678 robert@adatum.com M2J4T1 Canada	
Document No. Promotion Code Expected Mailing Date Signature Proof of Age Required - 18 Proof of Age Required - 19 Card for Pickup Do not Safe Drop			o Post Office ID ce No. fail stal Code on Country on Code	12345678 robert@adatum.com M2J4T1 Canada	

6. To submit a rate request, you need to define a package or packages for this shipment. Rate requests are determined per package. We have set up a predefined package previously. We will select it from the predefined package lookup. This defaults the package information.

hipping												
ip-To Contact		Robe	rt Townes			Ship-to City	/		Winnipeg			
hip-To Name		Adate	um Corporation			Ship-to Sta	te		MB			
hip-To Address		360 N	Main Street, Suite 11	50		Ship-to Co	untry/Region Code		CA			
hip-To Address 2	2					Ship-to Zip	Code		R3C3Z3			
Customs >												
	PACKAGE NAME											
Pac							00/50405			COD	NON	DAT
ac	PACKAGE NAME DEFAULT SIZE	Selec	t from full list 1)	WIDTH (CM)	HEIGHT (CM)	UNP	COVERAGE AMOUNT	MAI TUBE	COD AMOUNT	COD INCLU SHIPP	NON- DELIVERY	
Pac		Selec 2.00	t from full list 1) 20.00		HEIGHT (CM)				COD AMOUNT 0.00	INCLU SHIPP		RESULT
Pac	DEFAULT SIZE						AMOUNT	TUBE		INCLU SHIPP		RESULT
Pac	DEFAULT SIZE						AMOUNT	TUBE		INCLU SHIPP		RAT RESULT



7. Choosing a predefined package restricts the values for the package to be edited. If you wish to make changes to the package, you must remove the predefined package from the line. The values that were defaulted remain but can be modified. You must enter a parcel weight.

Dynamics 365 ${\scriptstyle \lor}$	Business Centr	al Sales Orders >	Sales Orders > S-C	RD101001 · Adatu	m Corporatio				Q	0	¢	9?	
HOME ACTIONS MANAGE													
Delete Edit Submit Rate Crea	te Non-Contract New Canada Shipment Reque	Post Rate											
EDIT - CANADAPOST RATE												>	×
Proof of Age Required - 19					Destinatio	n Country		Canada				~	
Card for Pickup					Destinatio	n Code		R3C3Z3					
Do not Safe Drop					Quote Tot	al						0.00	
Leave at door													
Shipping													
Ship-To Contact	Ro	bert Townes			Ship-to Ci	ty		Winnipeg					1
Ship-To Name	Ad	datum Corporation			Ship-to St	ate		MB					
Ship-To Address	36	0 Main Street, Suite 1150	0		Ship-to Co	ountry/Region Code	e	CA					
Ship-To Address 2					Ship-to Zi	p Code		R3C3Z3					
Customs >													
Packages													
PREDEFINED PACKAGE	PARCEL WEIGHT (KG)	LENGTH (CM)	WIDTH (CM)	HEIGHT (CM)	UNP	COVERAGE AMOUNT	MAI TUBE	COD AMOUNT	COD INCLU SHIPP	NON- DELIVERY	RE	RATE SULTS	
DEFAULT SIZE	2.00	30.00	30.00	30.00		0.00		0.00				0	

8. Press the action: Submit Rate Request to retrieve a list of CanadaPost services and rates applicable to your package. You will see the rate results change to show the number of services available.

Dynamics 365 ${\scriptstyle \lor}$	Business Cent	ral Sales Orders	> Sales Orders > S-	ORD101001 · Adatu	m Corporat				Q	0	Ē.	\odot	?	8
HOME ACTIONS MANAGE														
New CanadaPost Rate Request Actions	Create Non-Contract Shipment Canada Setu	p Post												^
EDIT - CANADAPOST RATE	REQUEST-1												\times	<
Proof of Age Required - 19					Destinati	on Country		Canada						^
Card for Pickup					Destinati	on Code		R3C3Z3						
Do not Safe Drop					Quote To	tal						(0.00	
Leave at door														
Shipping														
Ship-To Contact	R	obert Townes			Ship-to C	ïty		Winnipeg						
Ship-To Name	A	datum Corporation			Ship-to S	tate		MB						
Ship-To Address	3	50 Main Street, Suite 11	50		Ship-to C	ountry/Region Code	2	CA						
Ship-To Address 2					Ship-to Z	ïp Code		R3C3Z3						
Customs >														
Packages														
PREDEFINED PACKAGE	PARCEL WEIGHT (KG)	LENGTH (CM)	WIDTH (CM)	HEIGHT (CM)	UNP	COVERAGE AMOUNT	MAI TUBE	COD AMOUNT	COD INCLU SHIPP	NON- DELIVER	ſ	RAT RESULT		
DEFAULT SIZE	• 5.00	30.00	30.00	30.0		0.00		0.00					1	



9. To view the rates for any given package, make sure you have selected the package line in question. Click the Packages-Manage: View Services Action.

Dynamics 365 \vee Busin	Sales Orders > Sales Orders > S-G	ORD101001 · Adatum Corporation > 1	Q ()	☺ ?
Packages HOME ACTIONS MANAGE				
New Line				
× Delete Line				
View Services General				
EDIT - CANADAPOST RATE REQUEST	-1			×
Proof of Age Required - 19		Destination Country	Canada	
Card for Pickup		Destination Code	R3C3Z3	
Do not Safe Drop		Quote Total		0.00
Leave at door				
Shipping				
Ship-To Contact	Robert Townes	Ship-to City	Winnipeg	
Ship-To Name	Adatum Corporation	Ship-to State	MB	
Ship-To Address	360 Main Street, Suite 1150	Ship-to Country/Region Code	CA	
Ship-To Address 2		Ship-to Zip Code	R3C3Z3	

10. Services will be displayed along with the costs, shipping dates, taxes.

Dynamics	365 ~ B	usiness Centr	al s Orders ≻ S-OF	RD101001 · Adatu	m Corporation	> Canada	ost Rate	Request List ≻ 1	> WSI0001 CanadaP	ost Results	K ©		? 8
	4S												
S Edit List Create No Manage	on-Contract Shipping pment Label In	Tracking Receipt	Request Refund [®] Get Signature) Apply Charges to Document	Open in Excel									,
VIEW - WSI00	01 CANADAPOST R	ESULTS										1= 88	л X
SE	TRACKING-PIN	SERVICE CODE	SERVICE NAME	EXPECTED DELIVERY DATE	GU DELIV DAY	DUE	RE REQL	BASE COST	GST	PST	HST	AUTOMATION DISCOUNT	FUE
		DOM.EP	Expedited Parcel	3/21/2018		27.55		24.19	1.31	0.00	0.00	0.00	2.
		DOM.PC	Priority	3/19/2018		96.42		89.35	4.59	0.00	0.00	0.00	9.
		DOM.RP	Regular Parcel	3/22/2018		27.55		24.19	1.31	0.00	0.00	0.00	2.
		DOM.XP	Kpresspost	3/20/2018		57.06		50.34	2.72	0.00	0.00	0.00	5.

11. From this page, you can select the service that you are interested in purchasing and create a non-contract shipment. To create a non-contract shipment, you need to setup a valid payment option in your CanadaPost small business account. Otherwise you will receive an error message indicating specifically what the error is. Since we are in "TEST MODE", we can create a non-contract shipment without this restriction. Doing so will allow us to generate a shipping label and retrieve a receipt of the transaction.



12. Press the Create Non-Contract shipment option after choosing a service. You will only be able to select one service per package.

	Dynamics	s 365 🗸 🛛 B	Business Cent	ral s Orders > S-O	RD101001 · Adatu	n Corpora	tion > Canada	Post Rate	Request List > 1 >	WSI0001 CanadaP	ost Results	२ ©
C	HOME ACTION	NS										
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		_	DOM.PC	Priority	3/19/2018		96.42		89.35	4.59	0.00	C
			DOM.RP	Regular Parcel	3/22/2018		27.55		24.19	1.31	0.00	C
			DOM.XP	Xpresspost	3/20/2018		57.06		50.34	2.72	0.00	C

13. A tracking pin is generated and displayed. While in test mode, you will not be able to retrieve tracking information for a shipment. This feature will only work in production mode.

SE TRACKING-PIN SERVICE SERVICE NAME EXPECTED DELIVERY DATE GU. DATE RE. DAT BASE COST GST PST AUTOMATION DISCOUNT SURCH I ··· DOM.EP Expedited Parcel 3/21/2018 Image: Cost of the second	
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	•••	TRACKING-PIN	CODE DOM.EP	Expedited Parcel	DELIVERY DATE 3/21/2018		27.55	REQL	24.19	1.31	0.00	0.00	DISCOUNT 0.00	SUR	CHAR



14. Retrieve a PDF of the shipping label by clicking the "Shipping Label" action from the ribbon. All the "label" options will be displayed when in "test" mode regardless of options selected in setup menu. Production shipping labels will generate per the selected options.

For Testing Purposes Only À des fins de test uniquement					
Xpres	spost			For Testing Purposes Only A des fins de test uniquement	1
Tracking Number	\leq	Numéro de repérage		Xpresspost ^{™™}	YWG
Instructions 1. Choose a box designed for shipping. 2. Wrap your items so that they are secure in the box	To: ROBERT TOWNES A: Order No.: N° d'commande: P123456789			TO: / À: ROBERT TOWNES ADATUM CORPORATION 360 MAIN STREET, SUITE 1150 WINNIPEG MB R3C 3Z3	
and seal the box using proper shipping tape. 3. Cut the label on the dotted line and retain this half for tracking purposes.	Customer Credit Card Re Reçu de carte de crédit				SIGNATURE
4. Tape the label so it appears squarely on the largest side of the box (do not bend it around sides or end of box). <u>Do not tape over any part</u> of the barcode on the label.	Type de transaction: Card Type: / Type de carte:	pproved by the credit gne a été approuvée carte de crédit. Sale / Vente	DÉCOUPER	R3C 3Z3	
 Take the parcel to a Canada Post retail outlet for shipping. All items except Priority™ may also be deposited in a Street Letter Box. 	i otal partiel de la commande:		CUT HERE /		
 Choisissez une boîte conçue pour l'expédition. Empaquetez solidement vos articles dans la boîte 	PST/TVP: \$	32.72 CAD 30.00 CAD 30.00 CAD	CUTH	TRACKING NUMBER	N° DE REPÉRAGE
et scellez le tout avec du ruban d'expédition. 3. Découpez l'étiquette le long du pointillé et conservez cette partie pour suivi.	Authorization Code: 0 Code d'autorisation: 0 Date and Time: 2	557.06 CAD 007564 2018 03 16 10:42 EDT		Sender warrants that this item does not contain no L'expéditeur garantit que cet envoi ne contient pas ROMENDE CRONUS Canada, Inc.	30x30x30cm 10.000 KG VE/EV
 Apposez l'étiquette pour qu'elle paraisse entièrement sur le côté le plus grand de la boîte (ne pas la replier sur les côtés). <u>Ne recouvrez</u> aucune partie du code à barres de l'étiquette. 	Nom du commerçant: F Merchant Online Address: W	Canada Post Postes Canada www.canadapost.ca www.postescanada.ca		220 Yonge St Toronto ON M5E 1G5 EST/OEE V1801.1.232 SPEC 3696 V2 PIN / NIP:	P/F: 8533148 CC
5. Apportez le colis à un comptoir postal de Postes Canada pour expédition. Tous les envois sauf ceux utilisant Priorité ^{MC} peuvent aussi être déposés dans une boîte aux lettres publique.				Order No.: / N° d'commande: P123456 Auth Number / N° d'authorisation: 007584 In case of non-delivery, return at sender's expe En cas de non-livraison manquée, renvoyer au	ense at counter rates.
A barcode should be printed on the label because Dali visible, please contact the help desk at 1-877-378-1212 Un code à barres devrait etre imprimé surfétiquette lor code à barres r'apparaît pas, veullez communiquer av	2 for assistance. sque la confirmation de livraison est o	choisie. Si le			

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15. Click the Receipt button to retrieve a .txt file of the details for this transaction.

Receipt - Notepad File Edit Format View Help RECEIPT Final Shipping Point (Postal Code): M3C1J9 Shipping Point: NORTH YORK DON MILLS PO Shipping Point ID: 3269 Customer Number: XXXXXXXXXXXXX Service Used: DOM.XP Rated Weight: 10.000 Base Amount: \$50.34 Pre Tax Amount: \$54.34 GST Amount: \$2.72 Option Code: DC Option Price: \$0 Option Code: SO Option Price: \$1.50 Adjustment Code: FUELSC Adjustment Amount: \$5.45 Adjustment Code: V1DISC Adjustment Amount: \$-2.95 Merchant Name: Canada Post Merchant URL: www.canadapost.ca Name on Card: John Doe Authorization Code: 007564 Authorization Timestamp: 2018-03-16T10:42:53-04:00 Card Type: VIS Charge Amount: 57.06 Currency: CAD TXN Type: Sale AM Delivery: NO Guaranteed Delivery: YES Expected Delivery Date: 2018-03-20



16. To cancel this non-contract shipment, we can Request a Refund by pressing the "Request Refund" action from the ribbon. If this shipment has not been scanned into CanadaPost's system, a refund will be granted.

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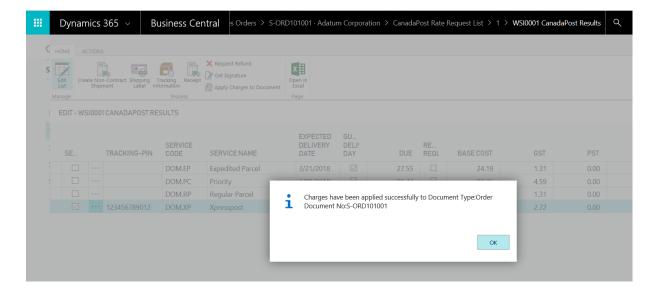
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17. Use the Apply Charges to Document action to create a new shipping charge line on the associated sales order based on the Setup option chosen.

Dyna	mics	365 ~ B	usiness Ce	ntral is Orders > S-OF	RD101001 · Adatur	m Corpora	ition > Canadaf	Post Rate	Request List > 1 >	WSI0001 Cana	adaPost Results	<u>२</u> 🙄	∎,
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	123456789012	DOM.XP	Xpresspost		Type:Order Do				2.72	





18. Review charges on Order. Close the CanadaPost Results and close the CanadaPost Quote Page. You will see the charge has been applied to the order based on your selected Setup Options from the CanadaPost Setup.

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	Cust	omer Name			Adatum Corporation]	Due Date			5/2/2018				
	Con	tact			Robert Townes]	Requested Deli	very Date		4/3/2018				
	Post	ing Date			4/2/2018				External Docum	nent No.						
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United States Shipping

 US shipping is like domestic shipping with a few additional conditions that must be met. Let's go through an example. Create an order that has a ship-to address in the US by first selecting new.

CRONUS Can	nada, Inc. Finance	 Cash Ma 	nagement ~	Sales \lor	Purchasir	ng ~ Approval	s∨ Self-Servic	e 🗸 🧼 Setup & Exte
Sales Orders:	All $\ensuremath{{ m \sc search}}$ +	- New Man	age 🔨 🛛 Repo	ort∨ Orde	r∨ Pag	je 🗸 🕴 Actions	Vavigate V	Report > Show
N0.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUMENT NO.	LOCATION CODE	DOCUME DATE	COM SHIPPE	AMOUNT SHIPPED NOT INVOICED (LCY)	AMOUNT SHIPPED NOT INVOICED (LCY) INCL. VAT	AMOUNT
S-ORD1010 ···	Adatum Corporation			4/2/2018	No	0.00	0.00	25,243.54
S-ORD1010	Adatum Corporation			5/1/2018	No	0.00	0.00	3,432.50
S-ORD1010	School of Fine Art			4/22/2018	No	0.00	0.00	7,785.60
S-ORD1010	Alpine Ski House			5/13/2018	No	0.00	0.00	856.50



2. Select a customer

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Customer Name Contact Posting Date Order Date	NO.	NO. 10000 20000 30000 40000	Adatum Corporation Trey Research School of Fine Art Alpine Ski House	CITY Winnipeg Missisauga Ottawa Calgary		nt No.	UNIT PRICE EXCL. VAT	TAX GROUP CODE	LINE DISCOUNT %	AM

3. Add an Item.

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		Sc			OF			[4/30/2018	
General		Sc	NO.	DESCRIPTION		UNITPRICE	ry Date	[4/30/2018	
General Customer Name		м	NO.	DESCRIPTION ATHENS Desk	OF	UNIT PRICE 1,503.40	ry Date	[4/30/2018	
General Customer Name Contact Posting Date		M:			OF MEASURE				4/30/2018	
General Customer Name Contact		м	<u>1896-S</u>	ATHENS Desk	OF MEASURE PCS	1,503.40			4/30/2018	
General Customer Name Contact Posting Date Order Date		M:	<u>1896-S</u> 1900-S	ATHENS Desk PARIS Guest Chair, black	OF MEASURE PCS PCS	1,503.40 289.60		[4/30/2018	
General Customer Name Contact Posting Date		M:	<u>1896-S</u> 1900-S 1906-S	ATHENS Desk PARIS Guest Chair, black ATHENS Mobile Pedestal	OF MEASURE PCS PCS PCS PCS PCS	1,503.40 289.60 651.40	nt No.		4/30/2018	
General Customer Name Contact Posting Date Order Date		M:	1896-S 1900-S 1906-S 1908-S 1920-S	ATHENS Desk PARIS Guest Chair, black ATHENS Mobile Pedestal LONDON Swivel Chair, blue ANTWERP Conference Tabl	OF MEASURE PCS PCS PCS PCS PCS PCS PCS	1,503.40 289.60 651.40 285.50 973.20	nt No. JNIT OF			
General Customer Name Contact Posting Date Order Date	N0.	Mt 4/: 4/:	1896-S 1900-S 1906-S 1908-S	ATHENS Desk PARIS Guest Chair, black ATHENS Mobile Pedestal LONDON Swivel Chair, blue	OF MEASURE PCS PCS PCS PCS PCS	1,503.40 289.60 651.40 285.50	nt No.	UNIT PRICE EXCL. VAT		LII



4. Use Quantity of 1.

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			ol of Fine Art		AIL			Due Date				4/30/2018		
General		Schoo			AIL			Due Date Requested D	elivery Da	ate		4/30/2018		
General Customer Name		Schoo	ol of Fine Art Jan Bond		AIT				,			4/30/2018		
General Customer Name Contact		Schoo	ol of Fine Art Jan Bond 018		AIL			Requested D	,			4/30/2018		
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5. Use a Custom Address

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	Manage Process Report Posting Request Approval Page Manage Process Report Posting Request Approval Page NEW - SALES ORDER - S-ORDI01005 · SCHOOL OF FINE ART									
			JL		L					
				Customergroup Code						
-	Shipping and Billing									
-	Ship-to	Custom Address	\sim	Location Code						
-	Code			Shipment Date	4/9/2018					
-	Name	School of Fine Art		Outbound Whse. Handling Time						
	Address	100 Queen Street, Suite 500]						
	Address 2									
	City	Ottawa								
	State	ON								
	Post Code	K1P 1J9								
	Country/Region	CA								
	Contact	Meagan Bond								
	SHIPMENT METHOD		1/	1						
	Code									
	Agent									
	Agent Service									



6. Change country to US. Set a valid State and Zip code.

Dynamics 365 🗸 🛛 Business Ce	ntral Sales Orders > S-ORD10100	15 · School of Fine Art	t	م
HOME ACTIONS NAVIGATE REPORT MANAG	Lines SE LINE ORDER			
S Canada Release Reopen Attachment		ng List by Post Post a Seno	and Send Approval Cancel Approval	Previous Next
Manage		eport Posting	Request Approval	Page
NEW - SALES ORDER - S-ORDI01005 · SCHOOL Shipping and Billing	OF FINE ART			
Ship-to	Custom Address	\sim	Location Code	
Code			Shipment Date	4/9/2018
Name	School of Fine Art		Outbound Whse. Handling Time	
Address	123 Somewhere			
Address 2				
City	New York			
State	NY			
Post Code	11010			
Country/Region	US			
Contact	Meagan Bond			
SHIPMENT METHOD				
Code				
Agent				
Agent Service				

7. Click the CanadaPost action from the ribbon.

	Dynamics 365 v Business Ce	ntral Sales Orders > S-ORD1	101005 · School of Fin	e Art	Q
C	HOME ACTIONS NAVIGATE REPORT MANAG	Lines E LINE ORDER			
S	Edit New Canada Release Reopen Attachment	Email Confirmation create Inventory Put-away/Pick Email Confirmation	Order	Post and Send Send Approval Cancel Approval Request Request Request Request	s Previous Next
	Manage P	rocess	Report Post	ing Request Approval	Page
1	NEW - SALES ORDER - S-ORD101005 · SCHOOL	OF FINE ART			
	Shipping and Billing				
-	Ship-to	Custom Address	\sim	Location Code	
-	Code			Shipment Date	4/9/2018
:	Name	School of Fine Art		Outbound Whse. Handling Time	
1	Address	123 Somewhere			
	Address 2				
	City	New York			
	State	NY			
	Post Code	11010			
	Country/Region	US			
	Contact	Meagan Bond			
	SHIPMENT METHOD				
	Code				



8. The destination country will default to United States along with defaulting the destination code.

	Dynamics 365 v Business C	entral Sales Orders > S-ORD101005 - School of Fine Art	> 4		Q (
C	Packages HOME ACTIONS MANAGE					
S	Delete Edit Submit Rate Create Non-Contract New Shipmen Manage Process	CanadaPost Rate Request				
	EDIT - CANADAPOST RATE REQUEST - 4					
	4					
_	General					
	Document No.	S-ORD101005	Deliver To Post Office			
_	Promotion Code		Deliver To Post Office ID			
	Expected Mailing Date		Client Voice No.			
	Signature		Client E-Mail			
	Proof of Age Required - 18		Origin Postal Code	M2J4T1		
	Proof of Age Required - 19		Destination Country	United States		
	Card for Pickup		Destination Code	11010		
	Do not Safe Drop		Quote Total			
	Leave at door					
	Shipping					
	Ship-To Contact	Meagan Bond	Ship-to City	New York		
	Ship-To Name	School of Fine Art	Ship-to State	NY		

9. Add a package, set the Parcel weight.

	Dynamics 365 🗸	Business Centra	al Sales Orders	S-ORD101005 · Sch	ool of Fine Art > 4					Q	. © .	₽ © ?
C	HOME ACTIONS MANAGE											
S	Delete Edit Submit Rate Create Request S	Non-Contract New CanadaP hipment Reque) lost Rate st									
	EDIT - CANADAPOST RATE RI	EQUEST - 4										>
	Proot of Age Required - 18					Origin Pos	stal Code		M2J411			
	Proof of Age Required - 19					Destinatio	n Country		United Stat	les		\sim
	Card for Pickup					Destinatio	n Code		11010			
	Do not Safe Drop					Quote Tot	al					0.00
	Leave at door											
	Shipping											
	Ship-To Contact	Me	agan Bond			Ship-to Ci	ty		New York			
	Ship-To Name	Sch	nool of Fine Art			Ship-to St	ate		NY			
	Ship-To Address	123	3 Somewhere			Ship-to Co	ountry/Region Code		US			
	Ship-To Address 2					Ship-to Zi	p Code		11010			
	Customs >											
	Packages											
	PREDEFINED PACKAGE	PARCEL WEIGHT (KG)	LENGTH (CM) ~	WIDTH (CM)	HEIGHT (CM)	UNP	COVERAGE AMOUNT	MAI TUBE	COD AMOUNT	COD INCLU SHIPP	NON- DELIVERY	RATE RESULTS
	DEFAULT SIZE	2.00	30.00	30.00	30.00		0.00		0.00			0

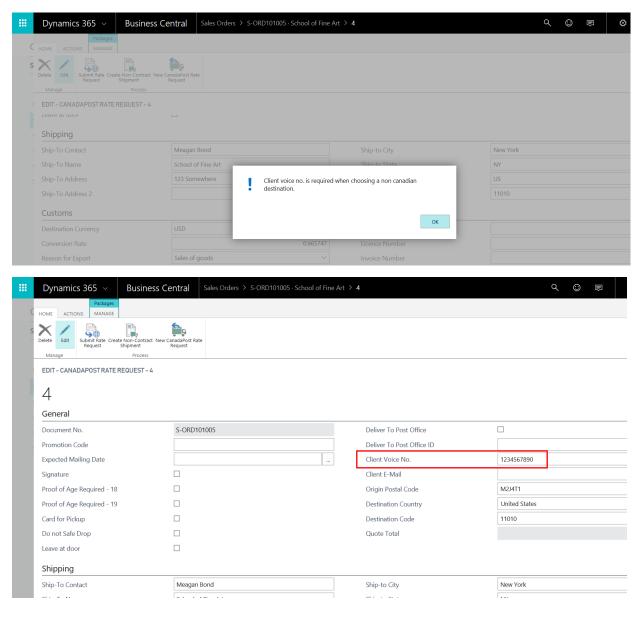


10. Since this is a package with destination of United States, you will need to define the customs information. Customs information is defined at both the quote request and package levels. The destination currency along with conversion rate will automatically default for you based on your Navision currency setup.

Uynamics 365 V Business Ce	ntral Sales Orders > S-ORD101005 · School of Fine	Art > 4				९ 😳 🖪	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
HOME ACTIONS MANAGE							
Delete Edit Submit Rate Create Non-Contract New Ca	badaPost Rate equest						
EDIT - CANADAPOST RATE REQUEST - 4 Leave at uson Shipping							
Ship-To Contact	Meagan Bond	Ship-to	City		New York		
Ship-To Name	School of Fine Art	Ship-to	State	NY			
Ship-To Address	123 Somewhere	Ship-to	Country/Region Code	US			
Ship-To Address 2		Ship-to	Zip Code		11010		
Customs							
Destination Currency	USD	Certific	ate Number				
Conversion Rate	0.665747	Licence	Number				
Reason for Export	Sales of goods V	Invoice	Number				
Reason for Export Desc							
Packages							
PREDEFINED PARCEL WEIGH PACKAGE (KG		GHT (CM) UNP	COVERAGE AMOUNT	MAI TUBE CO	COD INCLU DD AMOUNT SHIPF		I
DEFAULT SIZE	.00 30.00 30.00	30.00	0.00		0.00		



11. Click the Submit Rate Request Action. You will receive warnings for missing required information. A quote will not be submitted successfully until you correct all warning messages.





12. Select to view services under the packages ribbon.

	Dynamics 365 ${\scriptstyle \lor}$	Business Central	Sales Orders > S-ORD101005 · School of Fine	Art > 4	
	Packages				
(HOME ACTIONS MANAGE				
-	🚔 New Line 🛛 🔓 Customs Info				
-	🔆 Delete Line				
	Tiew Services				
	General				
	EDIT - CANADAPOST RATE I	REQUEST - 4			
	General				
	Document No.	S-ORD1	101005	Deliver To Post Office	
	Promotion Code			Deliver To Post Office ID	
	Expected Mailing Date			Client Voice No.	1234

13. Select the Service you wish to generate a non-contract shipment for and press the Create Non-Contract shipment action from the ribbon.

I Dy	'namic	s 365 🗸	Business Cen	tral Sales Orders > S	-ORD101005 · S	chool of	Fine Art > 4 >	WSI0001	CanadaPost Results		C) CO
Сноме	ACTIO	NS										
S Edit List Manage	2	Ion-Contract Shippin ipment Label	racking Receipt Information Process	X Request Refund Get Signature	Open in Excel							
SE	E	TRACKING-PI	SERVICE IN CODE	SERVICE NAME	EXPECTED DELIVERY DATE	GU DELIV DAY	DUE	RE REQL	BASE COST	GST	PST	HST
	□ ··	•	USA.EP	Expedited Parcel USA	3/22/2018		33.38		32.88	0.00	0.00	0.00
			USA.PW.PA	Priority Worldwide parcel.	3/22/2018		164.07		160.28	0.00	0.00	0.00
			USA.XP	Xpresspost USA	3/20/2018		55.12		53.18	0.00	0.00	0.00



s). D .	Tracking Receipt	🗙 Request Refund	Open in						
		n-Contract Shipping T ment Label Inf	Process	Apply Charges to Document	Excel						
	EDIT - W	1 CANADAPOST RE	SULTS								
	SE	TRACKING-PIN	SERVICE CODE	SERVICE NAME	EXPECTED DELIVERY DATE	GU DELI\ DAY	DUE	RE REQL	BASE COST	GST	PST
				Expedited Parcel USA							
			USA.PW.PA	Priority Worldwide parcel	3/22/2018		16/ 07		160.28	0.00	0.00
			USA.XP	Xpresspost USA	Please defi	ne custom lin	es for this pack	age.		0.00	0.00

14. Close the CanadaPost Results and select the Customs Info from the Packages option of the ribbon.

	Dynamics 365 ${\scriptstyle \lor}$	Business Central	Sales Orders > S-ORD101005 · School of Fine	Art > 4
C	HOME ACTIONS MANAGE			
-	📑 🗮 New Line 🛛 😭 Customs Info	K		
- 5	🔆 Delete Line			
	View Services			
	General EDIT - CANADAPOST RATE F Shipping	REQUEST - 4		
	Ship-To Contact	Meaga	n Bond	Ship-to City
	Ship-To Name	School	of Fine Art	Ship-to State
	Ship-To Address	123 So	newhere	Ship-to Country/Region Code

15. To ease entry of items in the package, select the "Create Items from Order" option which will add a line for each item on the associated sales order.

	Dynamics 365 🗸	Business Central	Sales Orders > S-ORD101005 · Schoo	l of Fine Art > 4	> WSI0001 CP Customs Lines		م	٢	۵	\odot	?	8
(HOME ACTIONS											
5	New Delete Edit Create	Items from Open in Excel										^
	VIEW - WSI0001 CP CUSTON	MSLINES + New							I	28	2	\times
	ITEM NO.	ITEM DESCRIPTION	QUANTITY	ITEM TARIF NO.	ITEM NET WEIGHT	ITEM UNIT PRICE	ITEM UNIT OF MEASURE	C	USTOM DE	SCRIPTI	ON	
	1896-S	··· ATHENS Desk	1		34.60	1,503.40	PCS					



16. The item tarif no. is mandatory for an item being shipped. Populate the Item Tarif No. and customs description. Also, the sum net weight of items must be less than or equal to package weight.

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	rtificate error https://docker01:49213/nav/Default?bookma	rk=24%3bJ5YtBACHBAAAAACHECcAAACHEC	c%3d&page=70096424&/filter=%27W\$10001%	620CP%20Customs%20lines%27.%27WSl0001	%20Hdr%20Entry%20No%27%		. 🖻 🕝
Dynamics 365	 Business Central Sales O 	rders > S-ORD101005 · School o	of Fine Art > 4 > WSI0001 CP Cu	stoms Lines	Q	0 🛡 🤃	?
HOME ACTIONS							
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New Manage	Process Page					a contract of	
EDIT - WSI0001 CP CUS	STOMS LINES + New					1≡ 88	Q
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Dynamics 365	V Business Central Sales O	rders ≻ S-ORD101005 · School c	of Fine Art > 4 > WSI0001 CP Cu:	stoms Lines	م	0 🕫 6	≥ ?
Dynamics 365	V Business Central Sales O	rders > S-ORD101005 - School c	of Fine Art > 4 > WS10001 CP Cut	stoms Lines	٩	© 🛡 ë) ?
	✓ Business Central Sales O	rders > S-ORD101005 · School c	of Fine Art. > 4 > WSI0001 CP Cu	stoms Lines	٩	c e c	> ?
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		rders 🗲 S-ORD101005 - School c	of Fine Art $>$ 4 $>$ WSI0001 CP Cu	stoms Lines	Q	© 🕫 🛛 8	≥ ?
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HOME ACTIONS New Delete Gat Manage EDIT - WSI0001 CP CUS ITEM NO.	Create lens from order Process STOMS LINES + New	QUANTITY	TEM TARIF NO. ITEM NET W	VEIGHT ITEM UNIT PRICE	ITEM UNIT OF MEASURE	LE RE	Q
HOME ACTIONS New Delete Light Manage EDIT - WS10001 CP CUS ITEM NO.	Create lens from order Process STOMS LINES + New	QUANTITY	TEM TARIF NO. ITEM NET W	VEIGHT ITEM UNIT PRICE	ITEM UNIT OF MEASURE	LE RE	Q
HOME ACTIONS New Delete Gat Manage EDIT - WSI0001 CP CUS ITEM NO.	Create lens from order Process STOMS LINES + New	QUANTITY	TEM TARIF NO. ITEM NET W	VEIGHT ITEM UNIT PRICE	ITEM UNIT OF MEASURE	LE RE	p
HOME ACTIONS New Delete Gat Actions New Delete Gat Manage EDIT - WSI0001 CP CUS ITEM NO.	Create lens from order Process STOMS LINES + New	QUANTITY	TEM TARIF NO. ITEM NET W	VEIGHT ITEM UNIT PRICE	ITEM UNIT OF MEASURE	LE RE	p
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HOME ACTIONS New Delete Git New Manage EDIT - WS10001 CP CUS ITEM NO. 1896-S	Create: Items from order Process STOMS LINES + New ITEM DESCRIPTION ATHENS Desk	QUANTITY 1	TEM TARIF NO. ITEM NET W 999.99.99.99	/EIGHT ITEM UNIT PRICE 34.60 1,503.4	ITEM UNIT OF MEASURE PCS	LE DB CUSTOM DESCRIP Package	,0 PTION
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HOME ACTIONS New Delete International TEM NO. 1896-5 Dynamics 366 HOME ACTIONS Edit Create Support	Create lens form process Process STOMS LINES + New TEM DESCRIPTION TEM DESCRIPTION TE	QUANTITY Sales Orders > S-ORD1010 t Refund nature charges to Document	TEM TARIF NO. ITEM NET W 999.99.99.99	/EIGHT ITEM UNIT PRICE 34.60 1,503.4	ITEM UNIT OF MEASURE PCS	LE DB CUSTOM DESCRIP Package	PTION
HOME ACTIONS New Delete Gar New Vanage EDIT - WS10001 CP CUS TEM NO. 1896-5 Dynamics 36 HOME ACTIONS Edit Create Non-Cor	Create lines from Open in Page Process STOMS LINES + New ITEM DESCRIPTION	QUANTITY Sales Orders > S-ORD1010 t Refund nature	TEM TARIF NO. ITEM NET W 999.99.99.99	/EIGHT ITEM UNIT PRICE 34.60 1,503.4	ITEM UNIT OF MEASURE PCS	LE DB CUSTOM DESCRIP Package	, PTION
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HOME ACTIONS New Delete III IIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Create length form Process STOMS LINES + New TEM DESCRIPTION TEM DESCR	CUANTITY Sales Orders > S-ORD1010 t Refund nature Charges to Document Charges to Document Charges to Document Charges to Document	TEM TARIF NO. ITEM NET W 1999.99.99.99 105 - School of Fine Art > 4 > 105 - School of Fine Art > 4 > 105 - School of Fine Art > 105 - School of Fine Art > 105 - School of Fine Art > 105	RE REQL BASE COST	e ITEM UNIT OF MEASURE PCS S S	E B CUSTOM DESCRIF Package Q	PTION ©
HOME New Delete Line New No. EDIT - WSI0001 CP CUS ITEM NO. 1896-S Dynamics 36 HOME ACTIONS Edit Edit Manage VIEW - WSI0001 C/	Create length form Process STOMS LINES + New TEM DESCRIPTION TEM DESCR	CUANTITY Sales Orders > S-ORD1010 t Refund nature Charges to Document Charges to Document Excel Page EXPECT	TEM TARIF NO. ITEM NET W 1999.99.99.99 105 - School of Fine Art > 4 > 105 - School of Fine Art > 4 > 4 > 105 - School of Fine Art > 4 > 4 > 105 - School of Fine Art > 4 > 4 > 4 > 4 > 4 > 4 > 4 > 4 > 4 >	VEIGHT ITEM UNIT PRICE 34.60 1,503.41 WSI0001 CanadaPost Result	r ITEM UNIT OF MEASURE PCS	LE B CUSTOM DESCRIF Package	PTION CO
HOME ACTIONS New Delete International TEM NO. 1896-S Dynamics 36 HOME ACTIONS Create Non-Construction Manage VIEW - WSI0001 C/ SE TR	Create length form Process STOMS LINES + New TEM DESCRIPTION *** ATHENS Desk 5 V Business Central AUDITION *** ATHENS Desk 5 V Business Central *** ATHENS Desk *** eque *** eq	CUANTITY Sales Orders > S-ORD1010 t Refund nature Charges to Document Charges to Docu	TEM TARIF NO. ITEM NET W 999-99-99-99 NO5 - School of Fine Art > 4 > 005 - School of Fine Art > 4 > TED GU RY DELIN DAY DUE 018 □ 33.38	YEIGHT ITEM UNIT PRICE 34.60 1,503.41 WSI0001 CanadaPost Result WSI0001 BASE COST REQU BASE COST 3 32.88	e ITEM UNIT OF MEASURE PCS S S GST 0.00	PST 0.00	PTION CO HST 0.00
HOME ACTIONS New Delete III Manage EDIT - WS10001 CP CUS TEM NO. 1896-S Dynamics 366 HOME ACTIONS IIII Create Non-Original Manage VIEW - WS10001 C/	Create length form Process STOMS LINES + New TEM DESCRIPTION *** ATHENS Desk 5 V Business Central AUDITION *** ATHENS Desk 5 V Business Central *** ATHENS Desk *** eque *** eq	CUANTITY Sales Orders > S-ORD1010 t Refund nature Charges to Document Charges to Document Charges to Document Charges to Document	TEM TARIF NO. ITEM NET W 999-99-99-99 NO5 - School of Fine Art > 4 > 005 - School of Fine Art > 4 > TED GU RY DELIN DAY DUE 018 □ 33.38	YEIGHT ITEM UNIT PRICE 34.60 1,503.41 WSI0001 CanadaPost Result WSI0001 BASE COST RE BASE COST 3 32.88	e ITEM UNIT OF MEASURE PCS S S	E B CUSTOM DESCRIF Package Q	PTION CO HST 0.00
HOME ACTIONS New Delete International TEM NO. 1896-S Dynamics 36 HOME ACTIONS Create Non-Construction Manage VIEW - WSI0001 C/ SE TR	Create length form Process STOMS LINES + New TEM DESCRIPTION *** ATHENS Desk 5 V Business Central Contract Shipping Tracking Receipt & Reque Process ANADAPOST RESULTS ACKING-PIN SERVICE CODE SERVIC USA.EP Expedit USA.PW.PA Priority	CUANTITY Sales Orders > S-ORD1010 t Refund nature Charges to Document Charges to Docu	TEM TARIF NO. ITEM NET W 999-99-99-99 005 - School of Fine Art → 4 → 005 - School of Fine Art → 4 → TED GU ERY DELIN DAY DUE 018 □ 33.38 018 □ 164.07	REE BASE COST 32.88 32.88	e ITEM UNIT OF MEASURE PCS S S GST 0.00	PST 0.00	PTION



List Ianage	eate No Ship	n-Contract Shipping T Label Inf	racking Receipt ormation	X Request Refund Get Signature	Open in Excel Page					
SE		TRACKING-PIN	SERVICE	SERVICE NAME	EXPECTED DELIVERY DATE	GU DELIV DAY	DUE	RE REQI	BASE COST	GST
			USA.EP	Expedited Parcel US						0.00
			USA.PW.PA	Priority Worldwide	1					0.00
			USA.XP	Xpresspost USA		nCode: 8716 ict requires a val	id value for N	Non-Delive	ry Handling.	0.00

17. Select a value for Non-delivery handling as required for United States shipping.

	Dynamics 365 ${\scriptstyle \lor}$	Business Cer	ntral Sales Orders	S-ORD101005 · Scho	ool of Fine	Art > 4					(२ 😳 ा			?
C	Packages HOME ACTIONS MANAGE														
c	📲 New Line 🛛 🙀 Customs Info														
	>>> Delete Line														
	View Services General														
	EDIT - CANADAPOST RATE I	REQUEST - 4													\times
1	Shipping														
ł	Ship-To Contact		Meagan Bond				Ship-to Cit	ty		New York	(
1	Ship-To Name		School of Fine Art				Ship-to St	ate		NY					
1	Ship-To Address		123 Somewhere				Ship-to Co	ountry/Region Code	9	US					
ł	Ship-To Address 2						Ship-to Zij	o Code		11010					
l	Customs														
l	Destination Currency		USD				Certificate	Number							
l	Conversion Rate				0.665747		Licence Nu	umber							
L	Reason for Export		Sales of goods		\sim		Invoice Nu	imber							
l	Reason for Export Desc														
l	Packages												/		
	PREDEFINED PACKAGE	PARCEL WEIGHT (KG)	LENGTH (CM)	WIDTH (CM)	HEIG	HT (CM)	UNP		MAI TUBE	COD AMOUNT	COD INCLU SHIPP	NON- DELIVERY		RATE RESULTS	
	DEFAULT SIZE	2.00	30.00	30.00		30.00		0.00		0.00		Abandon	\sim	:	5



18. Create non-contract shipment.

Dynamics 365 🗸	Business Ce	ntral Sales Orders	> S-ORD101005 · Scho	ool of Fine	Art > 4					С	x ©	Ē	⊕ ?
HOME ACTIONS MANAG													
New CanadaPost Rate Request	e Create Non-Contract Shipment Car	Setup nadaPost Setup											
EDIT - CANADAPOST RA	TE REQUEST - 4												
Shipping													
Ship-To Contact		Meagan Bond				Ship-to C	ty		New York				
Ship-To Name		School of Fine Art				Ship-to St	ate		NY				
Ship-To Address		123 Somewhere				Ship-to C	ountry/Region Cod	de	US				
Ship-To Address 2						Ship-to Zi	p Code		11010				
Customs													
Destination Currency		USD				Certificate	Number						
Conversion Rate				0.665747		Licence N	umber						
Reason for Export		Sales of goods		\sim		Invoice N	umber						
Reason for Export Desc													
Packages PREDEFINED PACKAGE	PARCEL WEIGH (KG		WIDTH (CM)	HEIC	HT (CM)	UNP	COVERAGE AMOUNT	MAI TUBE			NON- DELIVERY		RATE
	2.0		30.00	HEIO	30.00		0.00		0.00	SHIPP	Abandon	r	3
DUROUI JIZE	2.0	50.00	50.00		50.00		0.00		0.00		, wanaon		5

 1	Dynan	nics	365 ~ B	usiness Cen	tral Sales Orders	> S-ORD101007 · S	chool of Fi	ne Art > 9 >	WSI0001	CanadaPost Results		
Сно												
S Ec Li	lit Cre	ate Nor Shipr	-Contract Shipping	Fracking Receipt	X Request Refund Get Signature Apply Charges to Documen	Open in Excel Page						
ΙE	DIT – WS		CANADAPOSTRE	SULTS								
	SE		TRACKING-PIN	SERVICE	SERVICE NAME	EXPECTED DELIVERY DATE	GU DELI [\] DAY	DUE	RE REQL	BASE COST	GST	PST
				USA.EP	Expedited Parcel USA	2018-03-27		33.38		32.88	0.00	
				USA.PW.PA	Priority Worldwide	• • • • •				C 11	0.00	0.00
				USA.XP	Xpresspost USA	Your NonCo	ontract ship	ment was create	d success	fully.	0.00	0.00
										OK		



Additional Features

 Ship-to Post Office Option – This feature allows a delivery of package to a CanadaPost post office of the customer's choosing instead of attempting delivery to the customer's address. The customer will be notified by email when the package is available at the selected post office. Choose an order and create a new quote request.

CRONUS Can	ada, Inc.	Finance	Cash N	∕lanagement ∨	$Sales \lor$	Purchasing	g ~ Approvals	Self-Service	e∨ Setup &
Sales Orders:		Search +	New Ma	anage 🗸 🛛 Rep	ort ~ Orde	r∨ Page	e Actions ~	Navigate $^{\smallsetminus}$	Report \checkmark S
NO.	SELL-TO CUST	OMER NAME	EXTERNAL DOCUMEN NO.		DOCUME DATE	COM SHIPPE	AMOUNT SHIPPED NOT INVOICED (\$)	AMOUNT SHIPPED NOT INVOICED (\$) INCL. TAX	AMOUNT
S-ORD1010	Adatum Corpo	ration			2018-04-02	No	0.00	0.00	25,243.54
S-ORD1010	Adatum Corpo	ration			2018-05-01	No	0.00	0.00	3,531.27
S-ORD1010 ····	School of Fine	Art 🚽			2018-04-22	No	0.00	0.00	7,785.60
S-ORD1010	Alpine Ski Hou	se			2018-05-13	No	0.00	0.00	856.50
S-ORD1010	School of Fine	Art			2018-04-09	No	0.00	0.00	1,503.40
S-ORD1010	School of Fine	Art			2018-04-09	No	0.00	0.00	1,503.40
S-ORD1010	School of Fine	Art			2018-04-09	No	0.00	0.00	1,503.40

	Dyr	namics	365 ~	Busine	ess Cent	ral	Sales Or	ders > S-ORD	101003 · Scho	ol of Fi	ne Art				
						Lines									
C	HOME	ACTIONS	NAVIGATE	REPORT	MANAGE	LINE	ORDER								
S	Edit	°⊡ New ➤ Delete	Canada Releas	se Reopen A	Attachments C	reate Inve ut-away/F	ntory 🖶 P	mail Confirmation rint Confirmation tatistics	Picking List by Order	Post	Post and Send	Send Approval Request	Cancel Approval Request	of Create a Flow of See my Flows Mathematical Approvals	Previous 1
	Ma	nage			Proc	ess			Report	Pos	sting		Request Approv	/al	Page

EDIT - SALES ORDER - S-ORD101003 · SCHOOL OF FINE ART

S-ORD101003 · School of Fine Art

General

Customer Name	School of Fine Art	 Due Date
Contact	Meagan Bond	 Requested Delivery Date
Posting Date	2018-04-22	 External Document No.
Order Date	2018-04-22	

linoc



2. Select "Delivery to Post Office" option and use the drill down option on the "Delivery to Post Office ID" field to choose a post office. The top 10 options closest to the Destination Code will be shown.

	Dynamics 365 🗸 🛛 Business Ce	entral Sales Orders > S-ORD101003 · School of Fine	Art > 10	२ © 🕫 🔅 ? (
C	HOME ACTIONS MANAGE			
S	Delete Edit Submit Rate Create Non-Contract New C	andaPost Rate Request		
	EDIT - CANADAPOST RATE REQUEST - 10			×
-	10		\ \	·
	General			
	Document No.	S-ORD101003	Deliver To Post Office	
-	Promotion Code		Deliver To Post Office ID	
-	Expected Mailing Date		Client Voice N	
-	Signature		Client E-Mail OFFICEID DISTANC	
-	Proof of Age Required - 18		Origin Postal	
	Proof of Age Required - 19		0000313513 0.1 Destination C 0000021393 0.4	
	Card for Pickup		Destination C 0000021393 0.4	
	Do not Safe Drop		Quote Total 0000103585 0.4	
	Leave at door		<	Select from full list
			L	Select normalist

3. Populate the Client Voice No. and client e-mail as they are mandatory for using the "Deliver to Post office" option.

Deliver To Post Office	
Doliver To Port Office	
Deliver To Port Office	
Dalivar Ta Port Offica	
Deliver to Post Office	\checkmark
Deliver To Post Office ID	0000357502
Client Voice No.	9990002233
Client E-Mail	joe@smith.com
Origin Postal Code	M2J4T1
Destination Country	Canada
Destination Code	K1P1J9
Quote Total	
	Client Voice No. Client E-Mail Origin Postal Code Destination Country Destination Code



4. Add a package and submit a rate request.

	Dynamics 365 ${\scriptstyle \lor}$	Business Central	Sales Orders > S-ORD101003 · School of Fine	Art > 10	Q (
C	HOME ACTIONS MANAGE				
S	Delete Edit Submit Rate Crea Manage	te Non-Contract New CanadaPost Ra Shipment Request Process	ate		
	EDIT - CANADAPOST RATE	REQUEST - 10			
	10				
	General				
	Document No.	S-ORD1	101003	Deliver To Post Office	
	Promotion Code			Deliver To Post Office ID	0000357502
	Expected Mailing Date			Client Voice No.	9990002233
	Signature			Client E-Mail	joe@smith.com
	Proof of Age Required - 18			Origin Postal Code	M2J4T1
	Proof of Age Required - 19			Destination Country	Canada
	Card for Pickup			Destination Code	К1Р1Ј9
	Do not Safe Drop			Quote Total	
	Leave at door				
	Shipping				

5. To view all CanadaPost rate requests, you can use the CanadaPost Rate request list page. Search for CanadaPost Rate.

	Dynamics	365 ~	Business Central	Sales Orders			Q	:	٢
С	RONUS Car	nada, Inc.	SEARCH FOR PAGE	DR REPORT		\swarrow	\times		
Sa	ales Orders:	All	Type page or report	name to start search:	Canadapost rate				I
			1 search results:	All Lists					
٢	NO.	SELL-TO CU							
		Adatum Cor	Search the help for '	Canadapost rate' ?				vhile trying to ge	et reports
		Adatum Cor	por	NAME	DEPARTMENT			service. Please try n administrator i	y again o
			ne A	CanadaPost Rate Request List	Departments/CanadaPost for Sma	ll Business			
		Alpine Ski H	ous					ics	
		School of Fi	ne A						
		School of Fi	ne A						
		School of Fi	ne Auc	2010 04 05	eneli 000 000 00		-		



6. From this page, you can drill into any of your quote requests by clicking the entry no.

Dynamics 365 V Business Central Sa	ales Orders > CanadaPost	Rate Request List	८ © ।	P :
НОМЕ				
Edit View Delete Manage Page				
VIEW - CANADAPOST RATE REQUEST LIST				
ENTR	(NO	DOCUMENTTYPE	DOCUMENT NO.	
	1	Order	S-ORD101001	
	2	Order	S-ORD101001	
	3	Order	S-ORD101001	
	8	Order	S-ORD101002	
	10	Order	S-ORD101003	
	7	Order	S-ORD101004	
	4	Order	S-ORD101005	
	5	Order	S-ORD101006	
	6	Order	S-ORD101006	
	9	Order	S-ORD101007	

7. To change any of your CanadaPost setup options, search for CanadaPost Setup.

	Dynamics	365 ~	Business Central	Sales Orders			α	:	₽
(CRONUS Car	nada, Inc.	SEARCH FOR PAGE O	DR REPORT		2	\times		
S	Sales Orders:	All	O s Type page or report	name to start search:	CanadaPost setup		×		
			1 search results:	All Administration					
	NO.	SELL-TO CU						~	
		Adatum Co	Search the help for '(CanadaPost setup' ?					ving to g
		Adatum Co	rpor	NAME	DEPARTMENT				. Please tr inistrator
			ne A 🌾	CanadaPost-Setup	Departments/CanadaPost for Small Business				
		Alpine Ski H	lous					ics	
		School of F	ne A						
		School of F	ne A						
		School of F	ne Aux	2010/07/03 110	0.00 0.00 1,000.40	-	-		



8. From this page, you can switch the Mode to production or make changes to any of your setup options.

Dynamics 365 v Busin	ess Central Sales Orders > CanadaPost-Setup		Q (2) 🛱 🏟
HOME ACTIONS			
Edit Predefined Packages			
enage Process			
CanadaPost-S	etup		
General			
Small Business Customer No.	0008533148 ×	Production UserID	•••••
Mode	Test \checkmark	Production Password	•••••
Test UserId	•••••	Origin Postal Code	M2J4T1
Test Password	•••••		
Shipping Charge Setup			
Shipping Charge Type	G/L Account	Shipping Charge	67400
Notification			
Notification E-Mail	test@cronus.com	Notify On Exception	
Notify On Shipment		Notify On Delivery	
Label Preferences			
		Label - Show Insured	
Label - Show Packing			



How to purchase our CanadaPost for Small Business app.

You will get access to our CanadaPost for Small Business app for Dynamics 365 free for 30 days. If you would like to view the free trial expire date, search for CanadaPost for Small Business in the search bar.

Dynamics 365 $ imes $	Business Central			Environmen Sandbox	
	Canada, Inc. Finance Cash Managem TELLME WHATYOU WAY	ТТО DO	Z ×	Intelligent Clou	ud Insights
INSIGHT FROM					
Your	top customer was > CanadaPost-Setup > CanadaPost Defaul > CanadaPost Defaul > CanadaPost Rate R		on	urchase Invoice ew	PaymerReports
φ υ ο,	0-1-2				
← CanadaF	⊘ ost-Setup	+ 10			
Process Mc	e options				(i) 7 ⁴
General		Log	go		
Small Business Custom Mode · · · · · · · · · · · · · · · · · · ·	Test		CANAD/ POST	A S POSTES CANADA	
Shipping Charge	etup				
Shipping Charge Type	••••••				
Notification >					
Label Preferences	>				
	FreeTrial				

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