



User Guide

Custom Workflow Approvals

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1. ABOUT



This Custom Workflow Approvals application is designed to help clients wherein the standard features do not meet their needs. The standard options are limited to adding a condition on some data element of the document in order to trigger the workflow. The application extended this to allow for group based approvals, multiple tiers of groups, chained approvers, and more.

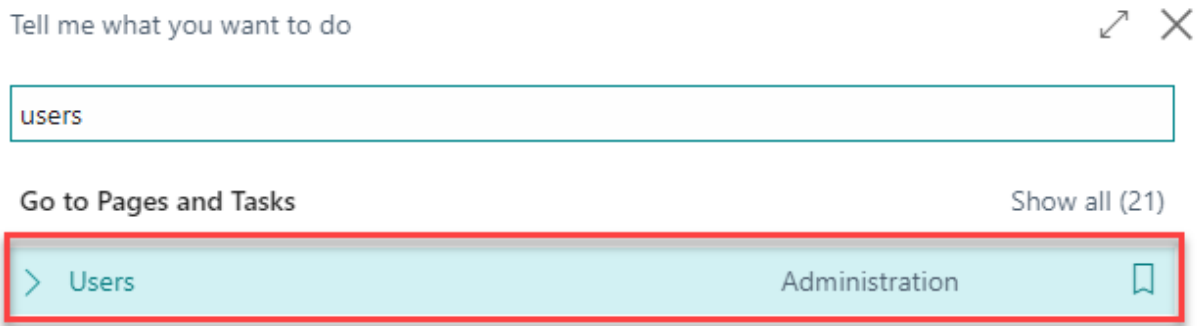
For more information, please go to <https://www.websan.com/custom-workflow-approvals>.

2. SECURITY

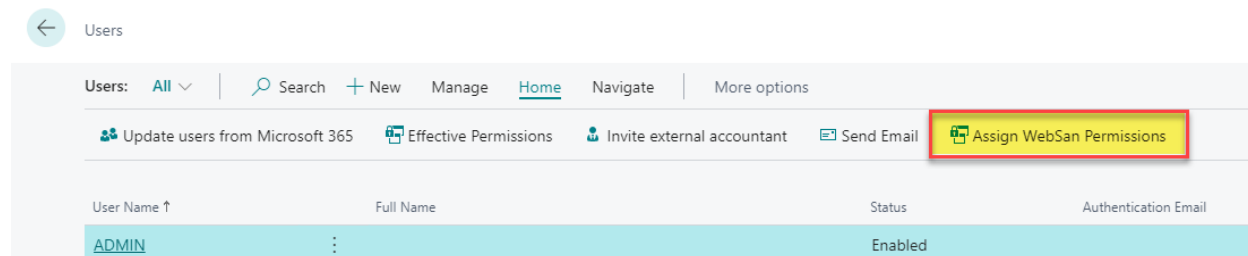
The T4A Generator application, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the AutoPermission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.



In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



3. REGISTRATION

To register a WebSan Inc.'s application, search WebSan Client Information and select WebSan Client Information – Administration.

Tell me what you want to do



websan client information

Go to Pages and Tasks

> WebSan Client Information Administration

In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.



WebSan Client Information

Transmit Data

General

MS Client ID On Hold

Active

Contact Information

Company *	<input type="text"/>	PostalCode / ZipCode *	<input type="text"/>
Name *	<input type="text"/>	Country *	<input type="text"/>
Address *	<input type="text"/>	Phone	<input type="text"/>
Address2	<input type="text"/>	Email	<input type="text"/>
City *	<input type="text"/>	Email CC	<input type="text"/>
Province / State *	<input type="text"/>	Billing is Same as Co... ..	<input checked="" type="checkbox"/>