WebSan Solutions Inc. User Guide: PII Complii



User Guide

PII Complii

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Ensure Personal Identifiable Information is sanitized from your system for all sales orders, shipments, sales invoices, and sales returns. Customer name, address, contact, email, and phone values are redacted on these sales documents after the required number of days.

For more information, please go to https://www.websan.com/pii-complii-personal-identifiableinformation

2. BASIC SETUP

This section covers the basic system setup needed to use the PII Complii app. These steps should be completed prior to using the app.

To configure the application using a guided step-by-step wizard:

- 1. Use the magnifying glass tool to go to the Assisted Setup window.
- In the Assisted Setup window, go to the section "Get ready for business", and select the PII Complii Configuration Wizard.

Assisted Setup			
🔎 🛛 🦸 Start Setup 🛛 🖓 General Videos			e T
 Title Get ready for business 	Completed	Learn more	Description
Connect to a payment service		Read	Connect to a payment service so that your
Migrate business data		Read	Import existing data to Business Central fr
Set up AMC Banking 365 Fundamentals ext		Read	Connect to an online bank service that can
Set up Cloud Migration		Read	Migrate data from your on-premises envir
Vendor Contract Management		Read	Choose next to start basic setting of contr
Vendor Contract Maintenance Configuratio		Read	Configure the Vendor Contract Maintenan
Item Attributes Configuration Wizard		Read	Configure the Item Attributes module
Inbound Container Handling Configuration		_	Configure the Inbound Container Handlin
Intelligent Order Routing Configuration Wi		_	Configure the Intelligent Order Routing m
Sales and Operations Planning Configurati		Read	Configure the Sales and Operations Planni
Landed Cost Validator Configuration Wizard		Read	Configure the Landed Cost Validator mod
Reservation Enhancer Configuration Wizard		Read	Configure the Reservation Enhancer module
PII Complii Configuration Wizard		Read	Configure the PII Complii module
Set up a bank statement file import format		_	Set up a bank statement file import format.

3. Follow the instructions in the wizard. You will be ready to start using the application.

PII Complii On-Boarding Wizard

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PII Complii Setup

Thank you for using the PII Complii application by WebSan Solutions Inc. For more information about the application, please visit

https://www.websan.com/pii-complii-personal-identifiable-information

Please, follow along as we help to configure the solution. Configuration can be changed at any time by navigating to the appropriate setup window in Business Central.

Let's go!

Choose Next to start configuring the PII Complii application.

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To manually configure the application, refer to the remaining topics of the Basic Setup section in this user guide.

General Settings

Use the magnifying glass tool to go to the Sales & Receivables Setup page. Under the PII Complii section, you will find the system settings for this application.

Sales & Receivables Setup								
🔲 PII Audit Log Custo	omer Groups Payments Mo	ore options						
Dimensions >								
Bank Deposits >								
Number Series >								
Background Posting	>							
Archiving >								
PII Complii								
Detault Waiting Perio	30	Sanitized Phone Num	555555555					
Based on Date	Document Date \sim	Sanitized Email	redacted@redacted.com					
Sanitized Value	REDACTED							

Use the fields in the section to configure the following options:

- Default Waiting Period (days): Default number of days to wait until posted documents are sanitized of personal information.
- Based on Date: Date field that PII Complii will use to determine documents to be sanitized. Options are, Document Date & Posting Date.

- Sanitized Value: Default replacement value for personal information that has been updated.
- Sanitized Phone Number: Default number of days to wait until posted documents are sanitized of personal information.
- Sanitized Email: Default replacement value for e-mail address that has been updated.

Use the magnifying glass tool to go to the Customers list and open your desired Customer's Card. Under the PII Complii section, you will find the following fields:

Customer Card 10000 · Adatum Corporation	Ø	È	+	۱ ۱		~	∕ Saved	ď,
Home Request Approval New Document Prices & Discounts Custome	r Report	M	ore options					(
📟 Contact 🛛 🖸 Apply Template 🛛 😚 Merge With 📼 Send Email								
General >						Ad	atum Corporat	ion
Address & Contact >					31772	robert.townes@contoso.com	Robert Tow	nes
PII Complii								
PII Compliance Required · · · · · · · · ·			Waiting Per	riod (days)				0

- PII Compliance Required: This dictates if the customer qualifies for PII compliance and requires documents to be sanitized.
- Waiting Period (days): The number of days to wait until posted documents are sanitized of personal information.

3. FUNCTIONALITY

The PII Complii application will update posted sales documents for those customers who qualify for PII (personal identifiable information) compliance. This is accomplished by an automated job queue for those customers who are marked as requiring PII compliance on the Customer Card.

Documents Impacted

- Posted Sales Shipment
- Posted Sales Invoices
- Posted Return Receipt
- Posted Credit Memo

Data Updated

- Ship To Name (1/2)
- Ship To Address (1/2)
- Ship To Contact
- Ship To Email (shipments and invoices only)
- Ship to Phone (shipments and invoices only)

Note: Documents are not updated when address is Customer Default or Alternative.

4. **REPORTING**

The PII Complii app allows users to access a list of Sales documents that have been sanitized by the application and hyperlinks to quickly access such documents.

PII Audit Log

Sales & Receivables Setup					
🔲 PII Audit Log	Customer Groups Payments More options				

The PII Audit Log action found in the Menu section of the Sales & Receivables Setup page shows a historical record of sanitized Sales documents that includes Document Type, Document Number, and Date Sanitized.

PII Audit Log							
,							
ID †	Document Type	Document Number	Date Sanitized				
1 :	Posted Sales Shipments	S-SHPT102229	2024-08-22				
2	Posted Sales Shipments	S-SHPT102233	2024-08-22				
3	Posted Sales Invoices	PS-INV103228	2024-08-22				
4	Posted Sales Invoices	PS-INV103231	2024-08-22				
5	Posted Credit Memo	PS-CR104005	2024-08-22				
6	Posted Return Receipt	S-RCPT107005	2024-08-22				
7	Posted Credit Memo	PS-CR104007	2024-08-22				
8	Posted Return Receipt	S-RCPT107007	2024-08-22				
9	Posted Sales Shipments	S-SHPT102236	2024-08-23				
10	Posted Sales Invoices	PS-INV103234	2024-08-23				

5. SECURITY

The PII Complii App, 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.

Tell me what you want to do		2 X
users		
Go to Pages and Tasks	:	Show all (21)
> Users	Administration	П

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

\leftarrow	Users								
	Users: All \vee	,	New Manage	Home	Navigate	More option	s		
	ቆ Update users fro	m Microsoft 365	🔁 Effective Perm	nissions	🌡 Invite exte	ernal accountant	🖃 Send Email	🖶 Assign WebSan Permissions	
	User Name ↑		Full Name				Status	Authentication Em	nail
	ADMIN	:					Enabled		

6. **REGISTRATION**

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

Tell me what you want to do		2 X
websan client information		
Go to Pages and Tasks		
> WebSan Client Information	Administration	П
In the WebSan Client Information w	indow, enter your company's contact and billing	
information. After your information	is complete, select Transmit Data.	
(
WebSan Client Info	ormation	
🔂 Transmit Data		
General		
MS Client ID	On Hold	
Active		
Contact Information		
Company · · · · · · · *	PostalCode / ZipCode \star	
Name *	Country · · · · · · · *	
Address · · · · · · · · · *	Phone · · · · · · · · · · · ·	
Address2 · · · · · · · · ·	Email	
City · · · · · · · · *	Email CC	
Province / State · · · · · \star	Billing is Same as Co 🕜 🌅	