User Guide

PII Complii

Last updated: October 23, 2023

TABLE OF CONTENTS

1. About

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.

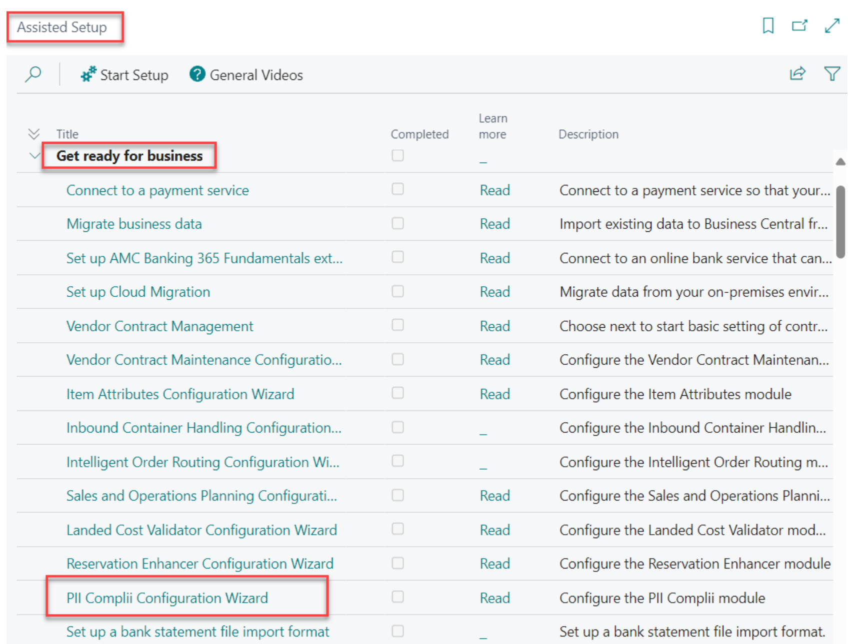
For more information, please go to https://www.websan.com/pii-complii-personal-identifiable-information

2. Basic Setup

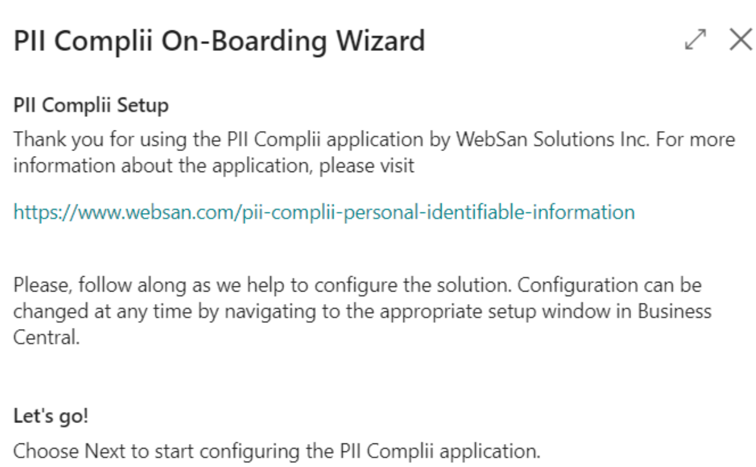
This section covers the basic system setup needed to use the PII Complii app. These steps should be completed prior to using the app.

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

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



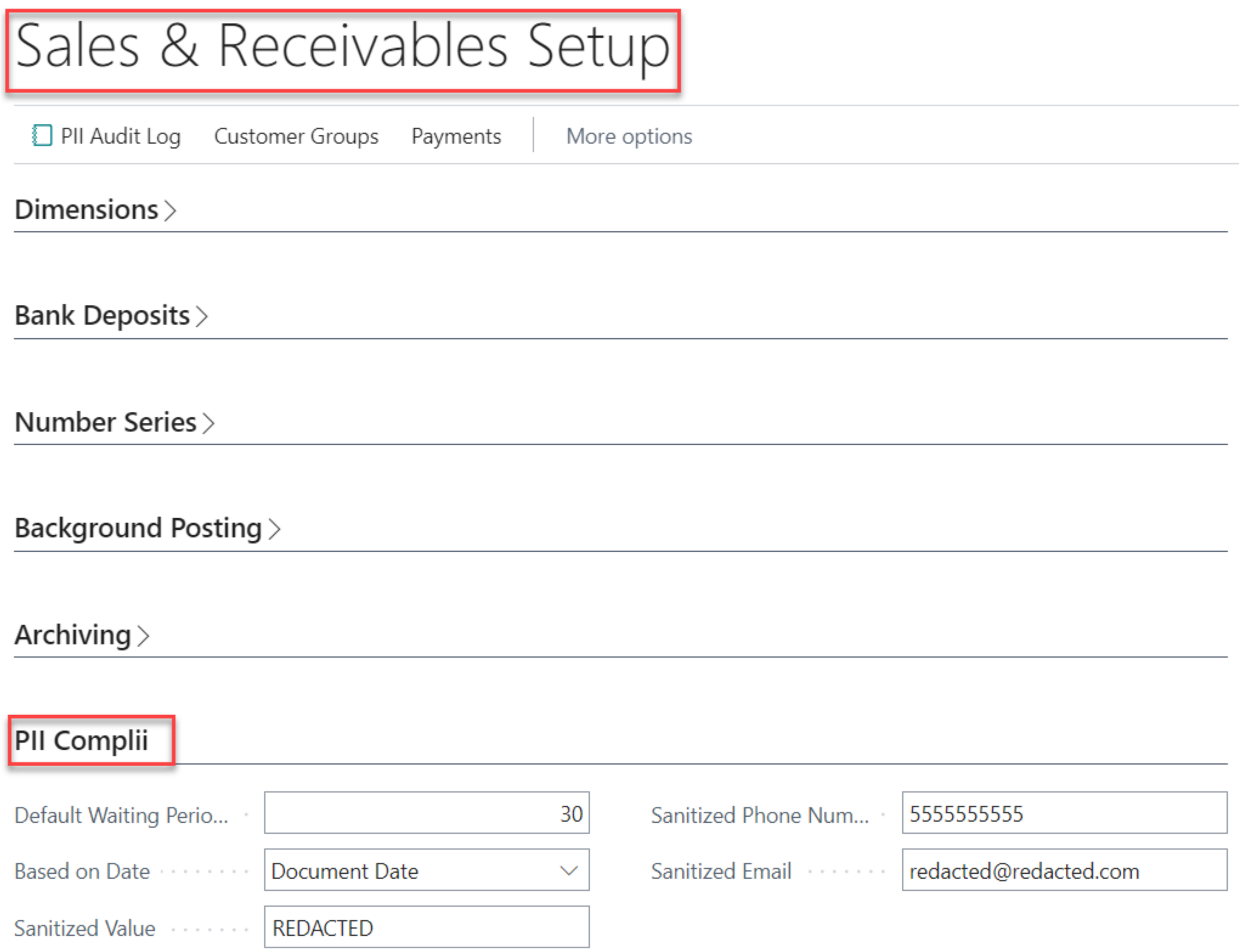
3. Follow the instructions in the wizard. You will be ready to start using the application.



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.

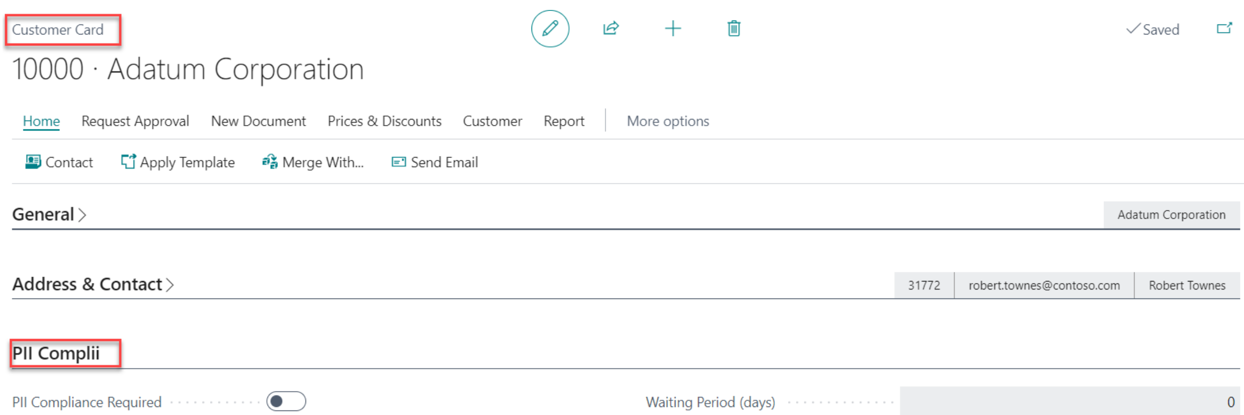


Use the fields in the section to configure the following options:

- 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:



- 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

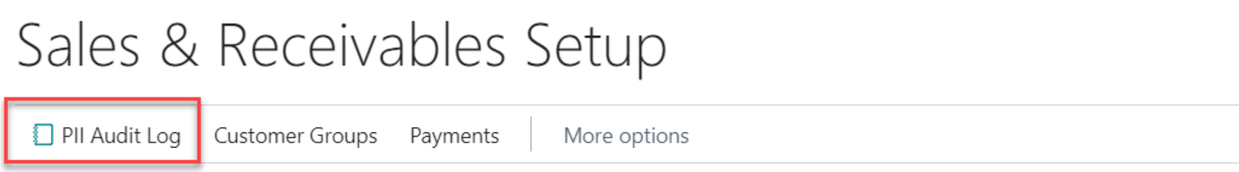
- Ship To Name (1/2)
- Ship To Address (1/2)
- Ship To Contact
- Ship To Email (shipments and invoices only)
- Ship to Phone (shipments and invoices only)

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

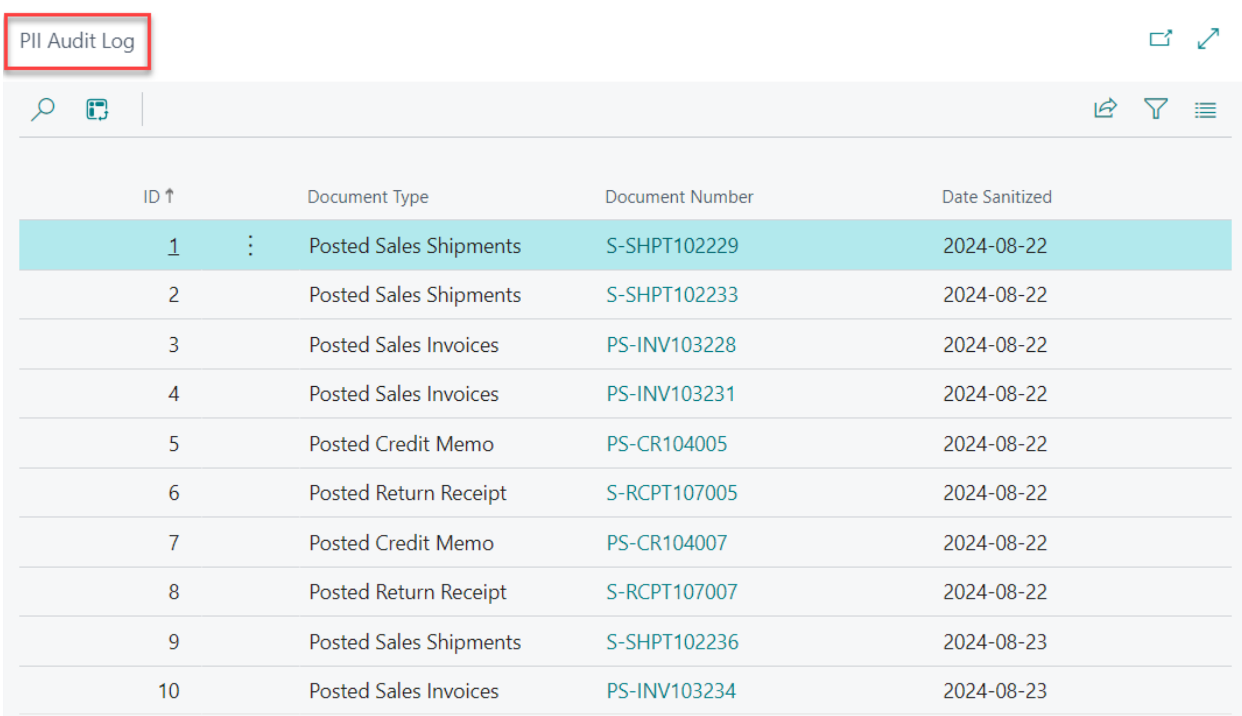
4. Reporting

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



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

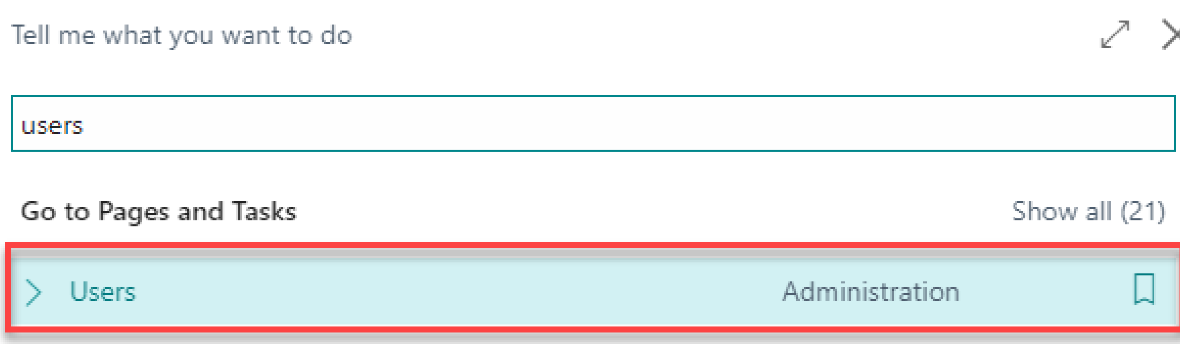
ID ↑	Document Type	Document Number	Date Sanitized
1	Posted Sales Shipments	S-SHPT102229	2024-08-22
2	Posted Sales Shipments	S-SHPT102233	2024-08-22
3	Posted Sales Invoices	PS-INV103228	2024-08-22
4	Posted Sales Invoices	PS-INV103231	2024-08-22
5	Posted Credit Memo	PS-CR104005	2024-08-22
6	Posted Return 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

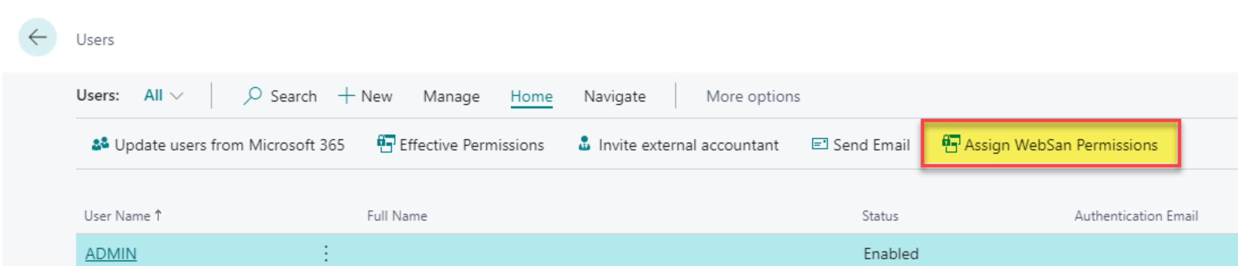
The PII Complii App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action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

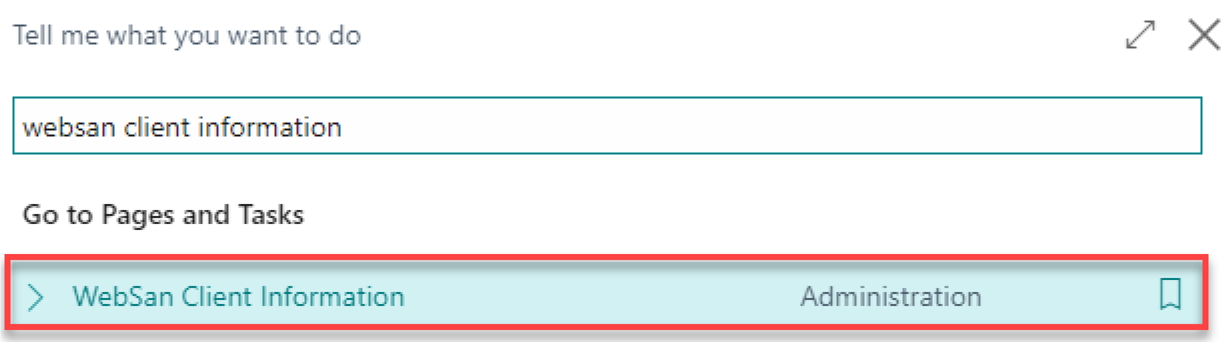


In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



6. REGISTRATION

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