

## User Guide

### User Sentiment Tracker for Dynamics 365 Business Central

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# **1. ABOUT**



The User Sentiment Tracker for Dynamics 365 Business Central app is a tool for management o gain insight into staff usage of Microsoft Dynamics 365 Business Central. It offers staff a simple option to provide feedback on the system that management can then view.

For more information, please visit: <u>https://www.websan.com/user-sentiment-tracker</u>

#### **2. FUNCTIONALITY**

The application will prompt users periodically as to whether or not they are enjoying using Dynamics 365 Business Central. This is a generic review and does not apply to specific functions or pages in Business Central, but rather, the system in general. Once a review is completed by a user, other users will not be prompted for a short period of time & that particular user will not be prompted again for 2 months.

The User Sentiment Tracker for Dynamics 365 app is accompanied by quarterly reporting to management staff on the feedback their users provide. Reporting will include details of user feedback as well as a summary for the period. This will be arranged by your account manager.

### **3. SECURITY**

The User Sentiment Tracker for Dynamics 365 App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in Auto Permission security functionality. When a user with the proper credentials installs an App, the Auto Permission 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 Auto Permission 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	Д

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

$\leftarrow$	Users					
	Users: All $\vee$		ew Manage <mark>Home</mark>	Navigate More option	IS	
	ቆ Update users fron	n Microsoft 365	Effective Permissions	Invite external accountant	🖃 Send Email	🖶 Assign WebSan Permissions
	User Name ↑	F	ull Name		Status	Authentication Email
	ADMIN	÷			Enabled	

### 4. **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	$\sim$ $\times$
websan client information	
Go to Pages and Tasks	
> WebSan Client Information	Administration
In the WebSan Client Information w information. After your information	indow, enter your company's contact and billing is complete, select Transmit Data.
(	
WebSan Client Info	ormation
🔂 Transmit Data	
General	
MS Client ID · · · · · · ·	On Hold
Active	
Contact Information	
Company ······ \star	PostalCode / ZipCode \star
Name	Country · · · · · · · *
Address · · · · · · · · · *	Phone · · · · · · · · ·
Address2 · · · · · · · ·	Email
City *	Email CC · · · · · · · ·
Province / State · · · · · \star	Billing is Same as Co 🕔 🌑