

For any person using Document Capture, a record must be configured in Continia User Setup. The Continia User records live across all companies in a database similar to a Business Central user account. For each company, the user's specific company parameters must be configured in the individual companies' Continia User Setup page.

Select the "magnifier" to find the Continia User Setup. Enter the text: "continia user setup" to start searching.	
Select "Continia User Setup Lists".	PURCHASE APPROVAL - CREDIT MEMOS DPEN PCMS PCMS FOR APPROVAL O D D D D D D D D D D D D D D D D D D
	Pients Tell me what too want toolo Z X urchase Invo continia user setup Coutomia user setup Custom Go to Pages and Tasks > Continia User Setup Lists > Default Continia User Setup Lists PURCHAL OPEN PIS PIS FOR APPROVAL RELEASED PIS OPEN PCMS PCMS FOR APPROVAL RELEASED PIS 0 > > > > >
In the Continia User Setup page we currently have two users: Annette Hill, who is the manager with unlimited approval, and the purchaser Richard Lum who has limited approval. When setting up approvals, it is recommended to start with creating the top-level approvers first and then work your way down the hierarchy. This makes the process much easier as you then can link the manager to the lower level approvers. Let's begin creating a new approver. Select " New " in the ribbon.	CONTINIA USER SETUP WORK DATE: 1/28/2021 Search + New Edit List © Delete Create a new entry. CONTINIA View C End List C E-MAIL SALESPERSON/PURCHA DEMO-NAV1 Annette Hill ah@demo.local Richard Lum
In the Continia User Setup Card, the first step is to look up the "Continia User ID ".	General Continia User ID Name E-Mail Salesperson/Purchaser Approver ID (Manager) Approval Administrator O Web Approval Approval Client



The Continia User List shows all the users configured							
in the Business Central Database. The column "Access to Companies" has a number in two of the	CONTINIA USER LIST + New						
three lines. This tells us that two of the three users	USERID	NAME	Ε-ΜΔΙΙ		ACCESS		
already are created as Continia users.	DEMO-NAV140W1	DEMO-NAV140W1\BD	1				
Choose the user "BD"	DEMO-NAV140W1	Annette Hill	ah@demo.local				
	DEMO-NAV140W1	Richard Lum	rl@demo.local				
Confirm the choice by colocting the " OK " butter		6					
					7		
	+ New				2		
	NAME	E-MAIL		ACCESS TO COMPANIES	LOGIN TYPE		
	EDEMO-NAV140W1\BD				Windows		
	Annette Hill	ah@demo.local		1	Windows		
	Richard Lum	rl@demo.local		1	Windows		
				08	Cancel OK		
Just below the Continia User ID, the name of the	General						
approver is shown				PURCHASE	NVOICE AND CREDIT		
The payt step is to accepte the user with a	Continia User ID	DEMO-NAV140W1\BD					
	Name · · · · · · · · · · · · · · · · · · ·	Bart Duncan		Approval Lim	rt · · · · · · · · · · · · · · · · · · ·		
corresponding "Salesperson/Purchaser" code.	E-Mail · · · · · · · · · · · · · · · · · · ·			Unlimited Ap	proval · · · · · · · · ·		
	Salesperson/Purchaser			Document Se	arch		
	Approver ID (Mapager)		Lool	c up value			
	Approval Administrator						
	Approval Administrator						
	Web Approval						
	Approval Client		T				
		Edia Liza 🖨 Dalaas 💰 Edia	B Marine Deserves	C-1	Show Attached		
user you currently are creating.	SALESPEOPLE/PURCHASERS	5 + New	a view Flocess	Salesheison	Show Attached		
In this scenario Bart Duncan is a good choice.	0005	NAME		00111			
		Annette Hill		COMMI	0.00 PHUNE		
	BD	Bart Duncan			0.00		
	DC	Debra L. Cor Bart Duncan			0.00		
	JR	John Roberts			5.00		
	LM	Linda Martin			0.00		
	MD	Mary A. Dempsey			5.00		
	PS RL	Peter Saddow Richard Lum			0.00		
Select " OK " to confirm the choice.	IASERS + New				2		
	NAME		COMMISSION %	PHONE NO.			
	Annette Hill		0.00				
	Bart Duncan		0.00				
	Debra L. Core		0.00				
	John Roberts		5.00				
	Mary A. Demos	ev	5.00				
	mary A. Demps	-,	5.00				
	Peter Saddow		5.00				
	Peter Saddow Richard Lum		5.00				



The new Continia User. Bart Duncan, is expected to	General		
have a restriction to his approval limit. Therefore the	Continia User ID	DEMO-NAV140W1\BD ····	PURCHASE INVOICE AND CREDIT
manager of Bart Duncan must be assigned.	Name	Bart Duncan	Approval Limit
Look up Bart's manager in the field "Approver ID	E-Mail	bd@demo.local	Unlimited Approval
(Manager)".	Salesperson/Purchaser	Bart Duncan	Document Search
	Approver ID (Manager)		
	Approval Administrator	Loo	ok up value
	Web Approval		
	Approval Client	Continia Web Approval Portal	Can Edit Posting Lines
In this scenario "Annette Hill" is a suitable choice.		Dpen in Excel	
	$\operatorname{continia}\operatorname{user}\operatorname{list}\ +\operatorname{New}$		
	CONTINIA USER ID	NAME	
	DEMO-NAV140W1\BD	Bart Duncan	
	DEMO-NAV140W1\DEMO	Annette Hill	
	DEMO-NAV140W1\RL	Richard Annette Hill	
			[
Confirm the choice by selecting the " UK " button.	Manage 🛛 Open in Excel		
	+ New		\swarrow
	R ID	Bart Duncan	
	0W1\DEMO	Annette Hill	
	0W1\RL	Richard Lum	
			OK Cancel
To ensigh the engravory administrative engravel visite	Concert		
activate the "Approval Administrator" switch	General		
For now we will leave it off	Continia User ID	DEMO-NAV140W1\BD ····	Approval Limit
	Name ·····	Bart Duncan	Unlimited Approval
	E-Mail	bd@demo.local	oninincerrippional
			Document Search
	Salesperson/Purchaser	Bart Duncan	Document Search
	Salesperson/Purchaser	Bart Duncan ····	Document Search
	Salesperson/Purchaser · · · · · · · · · · · · · · · · · · ·	Bart Duncan Annette Hill	Document Search
	Salesperson/Purchaser Approver ID (Manager) Approval Administrator	Bart Duncan Annette Hill	Document Search
	Salesperson/Purchaser Approver ID (Manager) Approval Administrator Web Approval	Bart Duncan Annette Hill	Document Search
	Salesperson/Purchaser Approver ID (Manager) Approval Administrator Web Approval Approval Client	Bart Duncan Annette Hill Image: Continia Web Approval Portal The second s	Document Search
As mentioned earlier, Bart Duncan will be assigned a	Salesperson/Purchaser	Bart Duncan Annette Hill Continia Web Approval Portal •	Can Edit Posting Lines
As mentioned earlier, Bart Duncan will be assigned a limited approval amount. If the approvers are	Salesperson/Purchaser · · · · · · Approver ID (Manager) · · · · · · · · · · · · · · · · · · ·	Bart Duncan Annette Hill Continia Web Approval Portal PURCHASE INVOICE AND CREDIT MEMO APPROVAL	Document Search
As mentioned earlier, Bart Duncan will be assigned a limited approval amount. If the approvers are assigned an unlimited amount, you enable the	Salesperson/PurchaserApprover ID (Manager)Approval AdministratorApproval AdministratorApproval Client	Bart Duncan Annette Hill Continia Web Approval Portal PURCHASE INVOICE AND CREDIT MEMO APPROVAL Approval Limit	Document Search
As mentioned earlier, Bart Duncan will be assigned a limited approval amount. If the approvers are assigned an unlimited amount, you enable the "Unlimited Approval" setting.	Salesperson/Purchaser Approver ID (Manager) Approval Administrator Web Approval Approval Client 1\BD	Bart Duncan Annette Hill Annette Hill	Can Edit Posting Lines
As mentioned earlier, Bart Duncan will be assigned a limited approval amount. If the approvers are assigned an unlimited amount, you enable the "Unlimited Approval" setting.	Salesperson/Purchaser Approver ID (Manager) Approval Administrator Web Approval Approval Client I\BD I\BD I\BD IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Bart Duncan Annette Hill Image: Continia Web Approval Portal Image: Continia Web Approval Portal PURCHASE INVOICE AND CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval CREDIT MEMO APPROVAL	Can Edit Posting Lines
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As mentioned earlier, Bart Duncan will be assigned a limited approval amount. If the approvers are assigned an unlimited amount, you enable the "Unlimited Approval" setting.	Salesperson/Purchaser · · · · · · · · · · · · · · · · · · ·	Bart Duncan Annette Hill Image: Continia Web Approval Portal Image: Continia Web Approval Portal PURCHASE INVOICE AND CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval Credit MEMO APPROVAL Approval Limit Image: Continia Web Approval Credit MEMO APPROVAL Approval Limit Image: Continia Web Approval Credit MEMO APPROVAL Approval Limit Image: Continia Web Approval Credit MEMO APPROVAL Document Search All documents	Document Search
As mentioned earlier, Bart Duncan will be assigned a limited approval amount. If the approvers are assigned an unlimited amount, you enable the "Unlimited Approval" setting.	Salesperson/Purchaser Approver ID (Manager) Approval Administrator Web Approval Approval Client I\BD	Bart Duncan Annette Hill Image: Continia Web Approval Portal Image: Continia Web Approval Portal PURCHASE INVOICE AND CREDIT MEMO APPROVAL Approval Limit Image: Continia Web Approval Credit Memo Approval Document Search All documents	Can Edit Posting Lines



To grant the approver an amount limit, fill in the value in the "Approval Limit" field. Today, Bart Duncan is granted 2000 as his maximum approval limit.	V1\8D]	PURCHASE INVOICE AND CREDIT MEMO APPROVAL Approval Limit Unlimited Approval Can Edit Posting Lines PURCHASE INVOICE AND CREDIT MEMO APPROVAL Approval Limit Unlimited Approval Can Edit Posting Lines Document Search All documents Document Search All documents	
	Jual Portal V	Can Edit Posting Lines · · · · · · · · · ·	
In the field "Document Search ", you can control if the user is allowed to search for documents on the Web Approval Portal. This option is only available for the Continia Web Approval Portal.	/1\BD	PURCHASE INVOICE AND CREDIT MEMO APPROVAL Approval Limit Unlimited Approval Document Search All documents	2.000 • Ait di
	proval Portal	Can Edit Posting Lines	
You can choose between two options: All Document or Own Documents only. For Bart Duncan the right setting is: "Own documents only ".	BD ····	PURCHASE INVOICE AND CREDIT MEMO APPROVAL Approval Limit Unlimited Approval Document Search All documents Own documents o	2.000 v nly Own e
	oval Portal	Can Edit Posting Lines	
With the Continia Web Approval Portal installed, the value in the field " Approval Client " is automatically set to " Continia Web Approval Portal ".	General Continia User ID Name E-Mail Salesperson/Purchaser Approver ID (Manager) Approval Administrator Web Approval	DEMO-NAV140W1\BD ··· Bart Duncan bd@demo.local Bart Duncan ··· Annette Hill ···	PURCHASE INVOICE AND CREDIT Approval Limit Unlimited Approval
	Approval Client	Continia Web Approval Portal	Can Edit Posting Lines



If you want to, you can easily change where the user	Web Approval					
approves the documents.	Approval Client		Contin	nia Web Approval Port	al 🔻	Can Edit Posting Lines
This property is also used when sending out approval	ripprordrenene		Windo	us Client		can carrioting circo
status e-mail with documents to approve. The status			Web C	lient iia Web Approval Portal		
e-mail includes a hyperlink with direct access to the					Co	ntinia Web Approval Portal
documents for approval in the selected client.						
The last setting on the Continia User Setup Card is			DUDQUA			
the switch "Can Edit Posting Lines".	1\BD		Approval	Limit		2 000
			Unlimited	Approval · · · · · ·		L1000
			Documen	t Search	···· Own documer	nts only
	proval Portal	•	Can Edit F	Posting Lines		
In the Continia Web Approval Portal, the user can edit			DUDQUAG			
the posting lines on the web approval portal when this	I\BD		Approval L	imit		2.000
property is enabled. The accounts and dimensions			Unlimited	Approval · · · · · ·		
that a user can use on the Web Approval Portal, are			Document	Search	Own documen	ts only
directly on the user or through Approval User Groups						
Let's grant Bart Duncan the privilege: "Can Edit						
Posting Lines".						
•						
	vroval Portal	•	Can Edit P	osting Lines · · · · · ·		
When finished, select "Back" to return to the Continia				(DATE: 1/29/2021		
User Setup.						
·	DEIV	10-N	JAV IZ	foan i/rr) - Bart I	Juncan
	🍄 Approval	User Group	ps 🔒 App	roval Permissions	Show Attached	More options
	General					
	Continia Use	er ID · · · · ·		DEMO-NAV140W1\E	D	PURCHASE INVOICE AND
	Name · · · ·			Bart Duncan		Approval Limit
	E-Mail · · · ·			bd@demo.local		Unlimited Approval
	Salesperson,	/Purchaser		Bart Duncan		Document Search
	Approver ID	(Manager)		Annette Hill		
Viewing the Continia User Setup list, everything		SER SETUP	WORK DATE	1/28/2021		
regarding Bart Duncan is perfectly set up.	O Saarah	- New	The Endia 1 in	t 🛱 Delete 🧳	Edit 🔁 View	Const Lister 5 Sand Walsons
	- Search	- New	By Edit Lis	u 🔲 Delete 🖌	Edit 🖸 view	C Export Osers Send Welcome
	CONTIN	IA	NAME		E-MAIL	CALECOFOCAL/DUPOUL
	DEMO-	, NAV1 :	Bart Dunca	n	bd@demo.local	Bart Duncan
	DEMO-	NAV1	Annette Hi	1	ah@demo.local	Annette Hill
	DEMO-	NAV1	Richard Lur	n	rl@demo.local	Richard Lum



Select "Back" to return to the role center.

CONTINIA USER ID NAME E-MAIL SALESPERSON, DEMO-NAV1 : Bart Duncan bd@demo.local Bart Duncan DEMO-NAV1 ahrodemo.local Annette Hill ahrodemo.local Annette Hill	/PURCH/
DEMO-NAV1 : Bart Duncan bd@demo.local Bart Duncan	
DEMO-NAV1 Appette Hill ab@demo.local Appette Hill	
angdeno.ocal Americe Init	
DEMO-NAV1 Richard Lum rl@demo.local Richard Lum	