Walkthrough: Creating and using User Types for Microsoft Dynamics 365 Business Central

Microsoft Dynamics 365 Business Central | Keensoft Limited

This walkthrough shows how to install, create and use User Types functionality within Microsoft Dynamics 365 Business Central.

About This Walkthrough

This walkthrough illustrates the following tasks:

- Installing User Types App

- Creating User Types Manually

- Creating User Types via Assisted Setup

- Assigning User Types to Users

- Using User Types functionality to Clear User's Posting dates

- Using User Types functionality to Copy User's Posting dates

Prerequisites

To complete this walkthrough, you need:

- Microsoft Dynamics 365 Business Central.

- CRONUS International Ltd. demonstration database.

Installing the User Types App

See Installing an Extension for details on how to install an extension

Creating User Types Manually

After the User Types app has been installed, follow the steps in this procedure to create User Types. A User Type is used to group users together via their functional areas specifically to assist with mass updating/modification of users posting dates.

1. Open Microsoft Dynamics 365 Business Central.
2. In the top right corner, choose the **Search for Page or Report** icon, enter **User Types**, and then choose the related link.
3. Choose the **New** action, and then fill in the fields as necessary. Choose a field to read a short description of the field or link to more information.

Creating User Types via Assisted Setup

1. Open Microsoft Dynamics 365 Business Central.
2. In the top right corner, choose the **Search for Page or Report** icon, enter **Assisted Setup**, and then choose '**Set up User Types**'.
3. Follow the Assisted Setup wizard to complete the setup

Note
It is not necessary to create a User Type for every single user, it is only necessary to create a User Type that represents users that will need to post into periods that fall outside of the Period defined within General Ledger Setup. See [How to Specify Posting Periods](#)

Assigning User Types to Users

Note
It you have not already created any User Types, when opening the 'User Setup' page, a notification will appear. You can click the notification link to open the User Type Setup Wizard from here.

1. Open Microsoft Dynamics 365 Business Central.
2. In the top right corner, choose the **Search for Page or Report** icon, enter **User Setup**, and then choose the related link.
3. Click **Edit List** action, and then for each user that requires a 'User Type', assign them their 'User Type' from the User Type drop down field.

Using User Types functionality to Copy User's Posting dates

1. Open Microsoft Dynamics 365 Business Central.
2. In the top right corner, choose the **Search for Page or Report** icon, enter **User Setup**, and then choose the related link.
3. In the **User Setup** window, select a user who's posting dates you want to copy.
4. Click the **Copy Posting Dates** action to Copy the Posting dates from the currently selected user to all other users with the same User Type.

Using User Types functionality to Clear User's Posting dates

1. Open Microsoft Dynamics 365 Business Central.
2. In the top right corner, choose the **Search for Page or Report** icon, enter **User Setup**, and then choose the related link.
3. In the **User Setup** window, filter the users displayed by filtering on the **User Type** field.
4. Click the **Clear Posting Dates** action to clear the Posting dates from the filtered records.