



# **White Paper**

**Direct Email from**

**D365 F&O**

**Eftsure inside Microsoft Dynamics 365 for F&O**

# Change History

Version	Date	Change Summary	Author
1.0	08/05/2024	Initial draft for beta version	Trang

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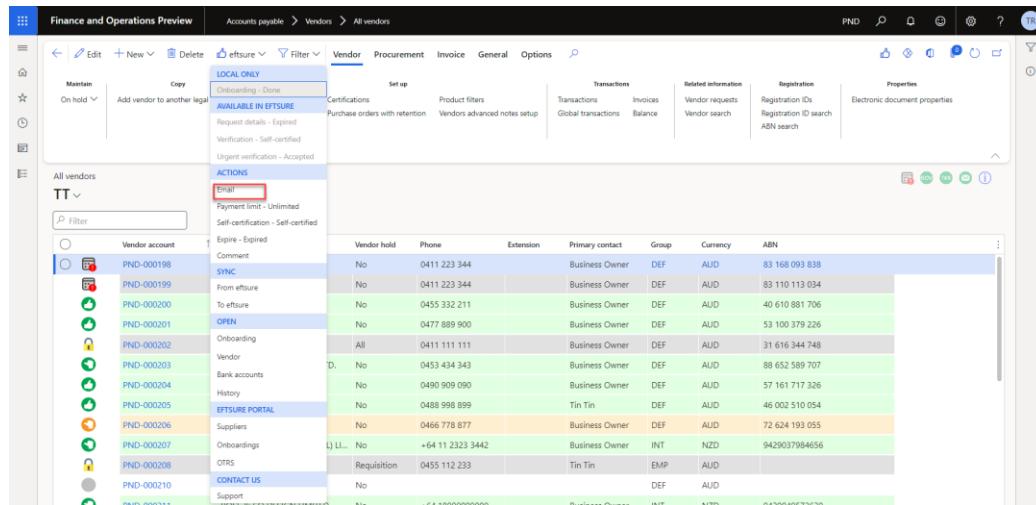
# INTRODUCTION

This user guide will walk you through how to setup email feature within eftsure menu. This feature will allow user to send **reminder** email directly from D365 to vendors.

**Note:** this setup should only be done by **D365 & eftsure system administrator**.

## ACCESSIBLE

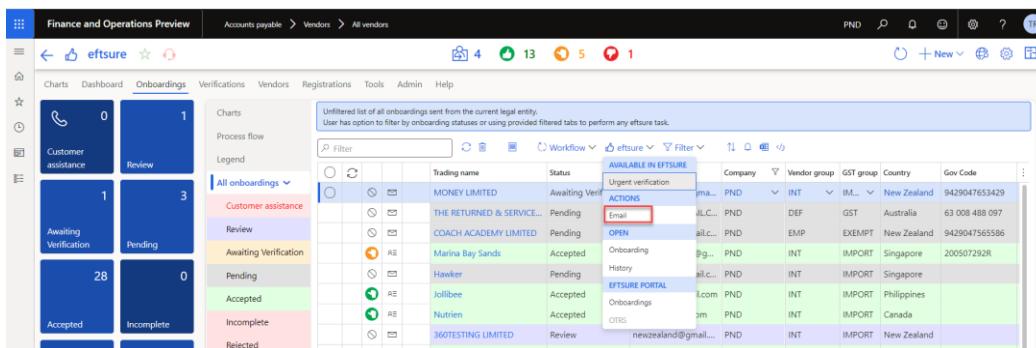
Direct email feature can be accessed via **eftsure** main menu.



The screenshot shows the 'Vendors' screen in the eftsure main menu. The 'Actions' dropdown is open, and the 'Email' option is highlighted. The main table lists various vendor records with columns for Vendor hold, Phone, Extension, Primary contact, Group, Currency, and ABN.

Vendor hold	Phone	Extension	Primary contact	Group	Currency	ABN
No	0411 223 344		Business Owner	DEF	AUD	83 168 093 838
No	0411 223 344		Business Owner	DEF	AUD	83 110 113 034
No	0455 332 211		Business Owner	DEF	AUD	40 610 881 706
No	0477 889 900		Business Owner	DEF	AUD	53 100 379 226
All	0411 111 111		Business Owner	DEF	AUD	31 616 344 748
No	0453 434 343		Business Owner	DEF	AUD	88 652 589 707
No	0490 909 090		Business Owner	DEF	AUD	57 161 717 326
No	0488 998 899		Tin Tin	DEF	AUD	46 002 510 054
No	0466 778 877		Business Owner	DEF	AUD	72 624 193 055
No	+64 11 2323 3442		Business Owner	INT	NZD	9429037984656
No	0455 112 233		Tin Tin	EMP	AUD	
No				DEF	AUD	

And from eftsure workspace



The screenshot shows the 'Onboardings' screen in the eftsure workspace. The 'Actions' dropdown is open, and the 'Email' option is highlighted. The main table lists various onboarding records with columns for Trading name, Status, Company, Vendor group, GST group, Country, and Gov Code.

Trading name	Status	Company	Vendor group	GST group	Country	Gov Code
MONEY LIMITED	Awaiting Verification	jm...	PND	INT	IM...	New Zealand
THE RETURNED & SERVICE...	Pending	jIL...	PND	DEF	GST	Australia
COACH ACADEMY LIMITED	Pending	all...	PND	EMP	EXEMPT	New Zealand
Marina Bay Sands	Accepted	Onboarding	g...	PND	INT	IMPORT
Hawker	Pending	History	all...	PND	INT	IMPORT
Jollibee	Accepted	EFTEURE PORTAL	l...	PND	INT	Philippines
Nutrien	Accepted	Onboardings	3m	PND	INT	IMPORT
360TESTING LIMITED	Review	OTRS	newzealand@gmail...	PND	INT	IMPORT
						New Zealand

## EMAIL BODY (SNIPPETS)

This section will clarify how to setup email body in **Parameters > Snippets**.

User can create new template using standard New button. Sample email can be selected from Templates drop down list and content of the template can also be edited.

The screenshot shows the 'Finance and Operations Preview' interface. The left sidebar shows 'Standard view' and 'Parameters for eftsure'. The main area is titled 'Parameters for eftsure' and shows a list of entities. A red box highlights the 'Snippets' section. The 'Template' dropdown is open, showing 'Onboarding reminder' and 'Verification reminder'. The right side shows a preview of the template content.

To edit the template, user can use left hand side window to edit the text and format, preview will be shown on the right hand side.

The screenshot shows the 'Set HTML for Template (HTML Compatible)' dialog. The left pane is a rich text editor with a toolbar, and the right pane is an 'HTML Previewer' showing the rendered template content. A red box highlights the preview area.

Note: below are the available placeholders which can be used for editing email body.

%CompanyName%, %DataArea%, %DefaultBankAccount\_AccountNum%,  
 %DefaultBankAccount\_AccountNumXXX%, %DefaultBankAccount\_RegistrationNum%,

%FirstName%, %LastName%, %Message%, %portalURL%, %UserEmail%, %UserName%,  
%VATNum%, %VendorAccount%, %VendorName%

## EMAIL TEMPLATE

The next step is to setup default email note which is linked to email ID.

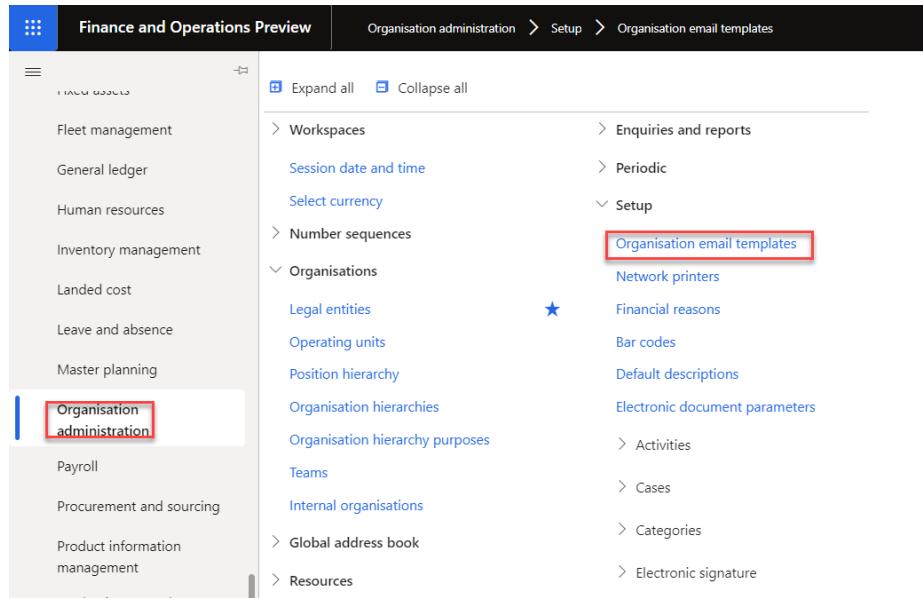
Please ensure to have %Message% at the end of the email if you wish to see the email body which is setup in Snippets.

This is an automated message from <https://eftsure.com.au/>  
Please do not reply.

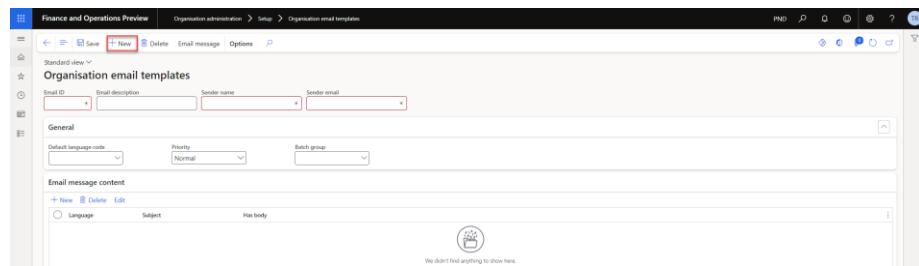
%Message%

## EMAIL ID

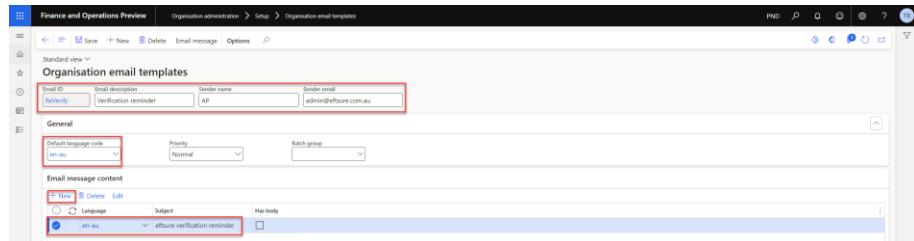
User can setup email ID from **Organisation administration > Setup > Organisation email templates**.



If there is no existing email ID, user can create new one dedicated to eftsure only.



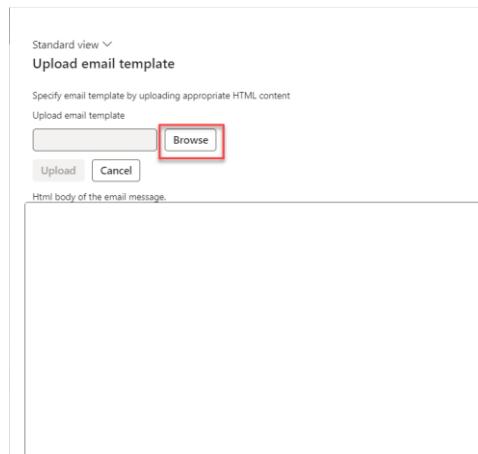
All mandatory fields will need to be filled in including Email message content.



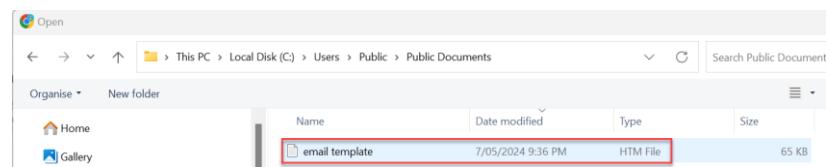
To include a default message for the email, user can use Edit button.



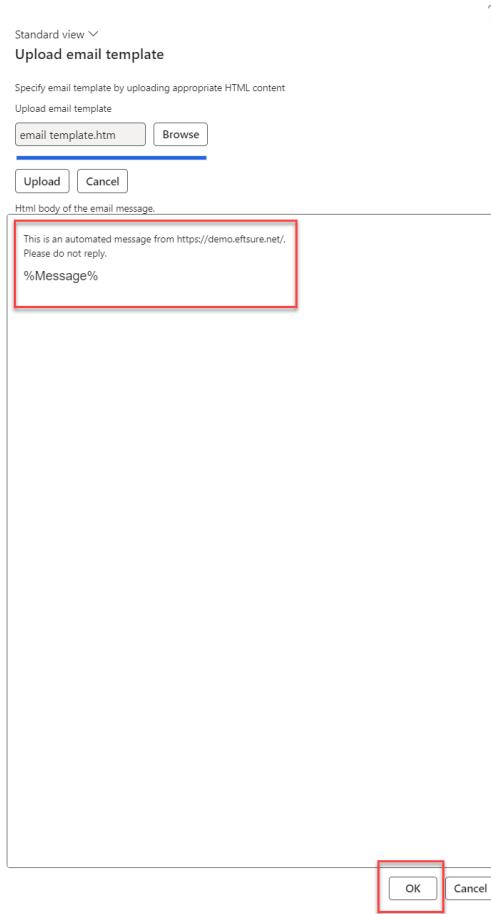
New window will pop up allow user to Import and Upload the saved html template.



Select email template which was created in previous step Email Template.



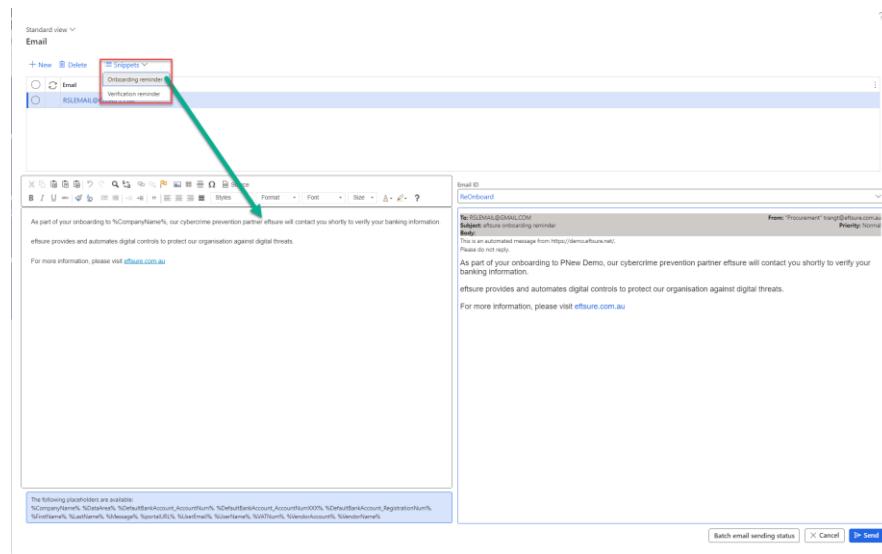
Upload email template for review.



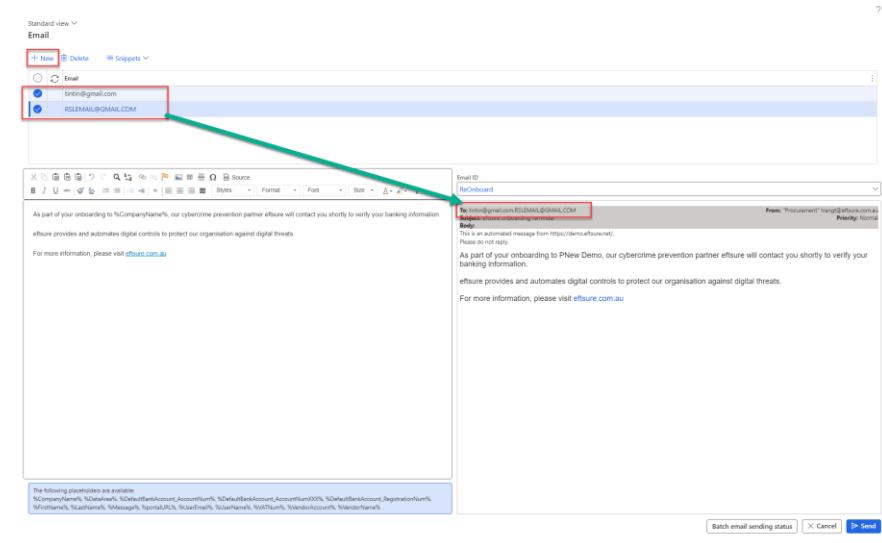
## EMAIL FORM

Once all of the above steps have been setup correctly, to use the direct email function, please navigate to eftsure main menu from Accessible section.

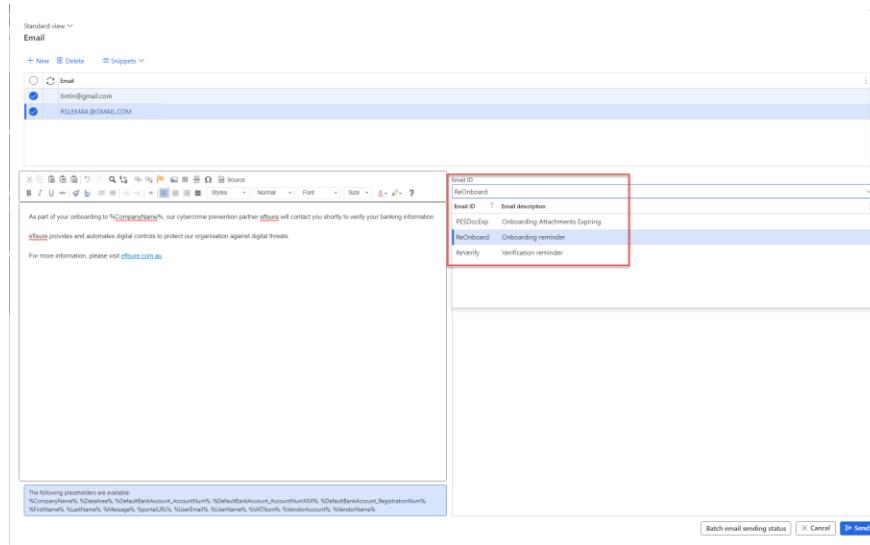
User can select Snippets template which was setup previously. The message can also be edited on the left hand side.



Existing email available in vendor master will be auto populated in email section, user can also add additional email address, once selected, all email addresses will be shown in the preview window under **To** section.

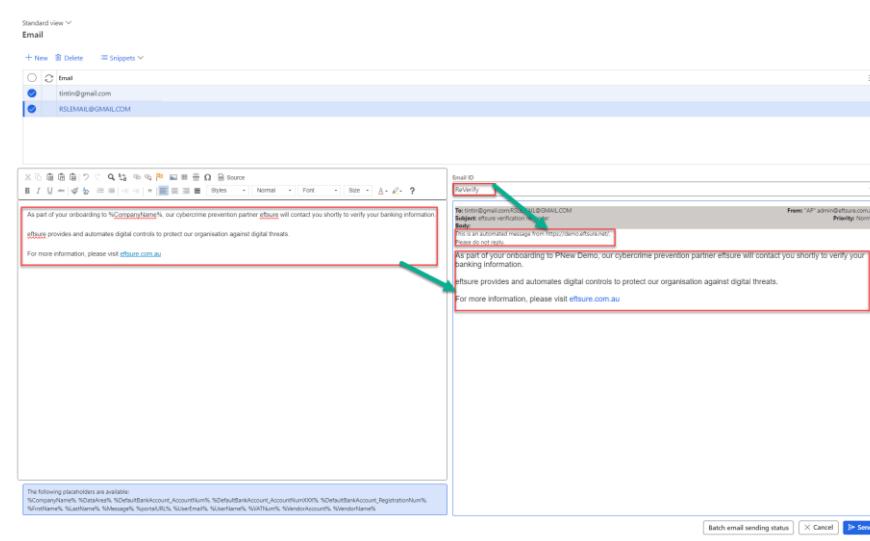


Email ID which was setup in previous section can also be selected from the drop down list.



If there's a default message linked to selected email ID, it will appear in the preview window with the snippet email message.

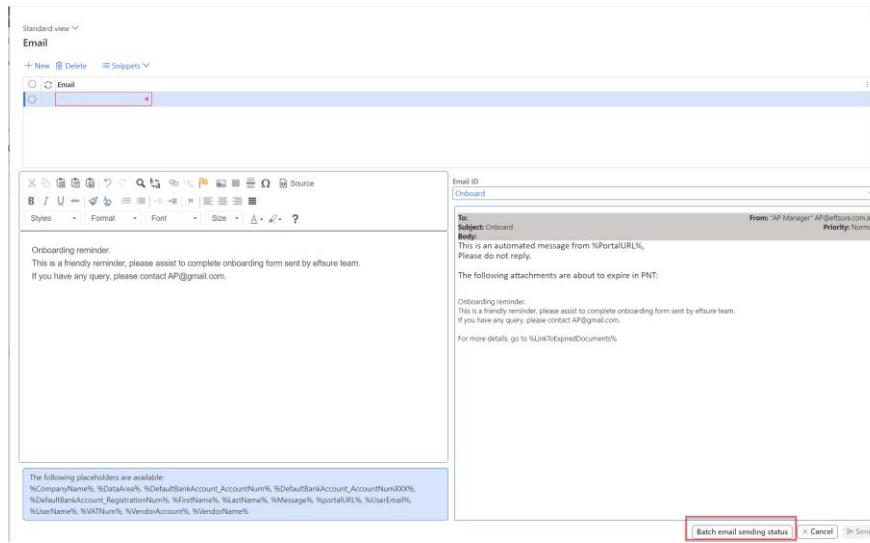
User can edit the snippet email message as required on the left window.



Once all information has been reviewed, user can click Send button to send email directly from D365 to Vendor.

## EMAIL HISTORY

User can review the history of all email which have been sent via Batch email sending status.



By clicking at Show message, user should be able to see what have been sent to the vendor.

