



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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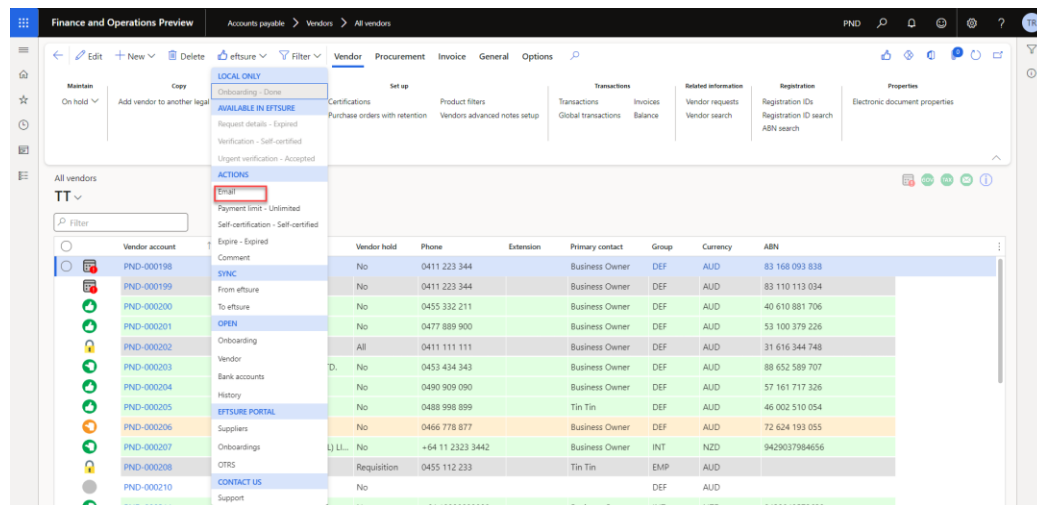
INTRODUCTION

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

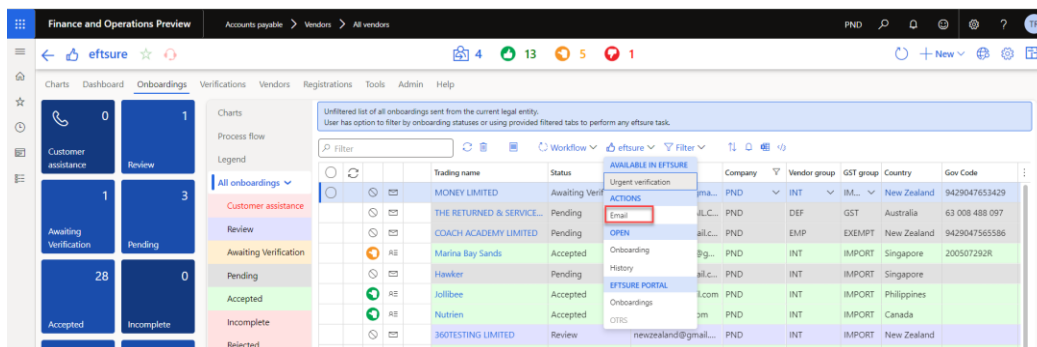
Note: this setup should only be done by **D365 & eftsurre system administrator**.

ACCESSIBLE

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



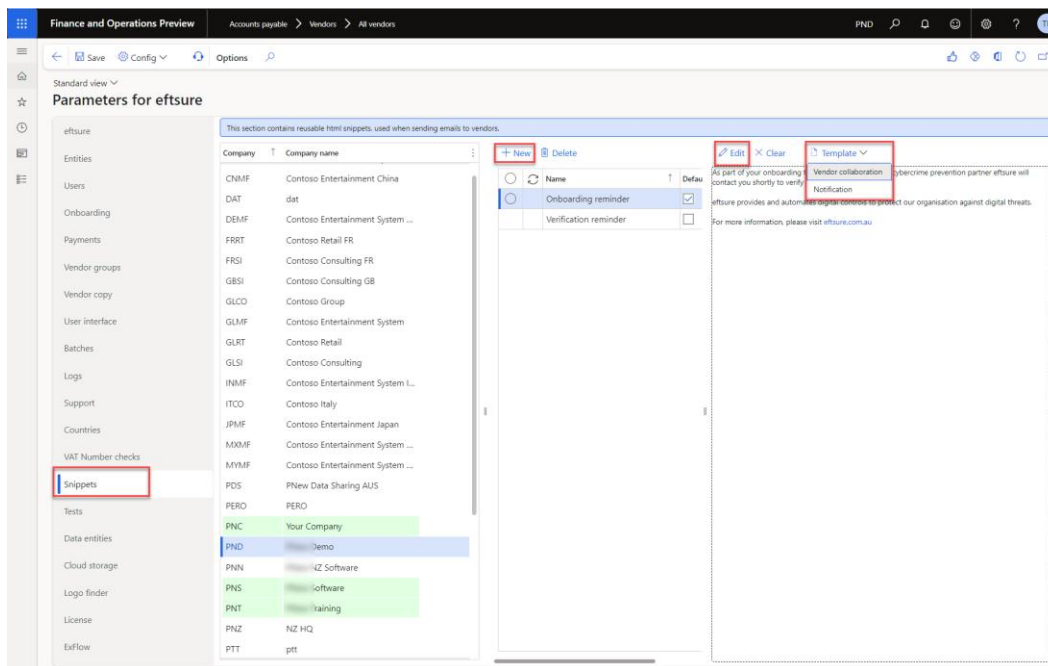
And from eftsurre workspace



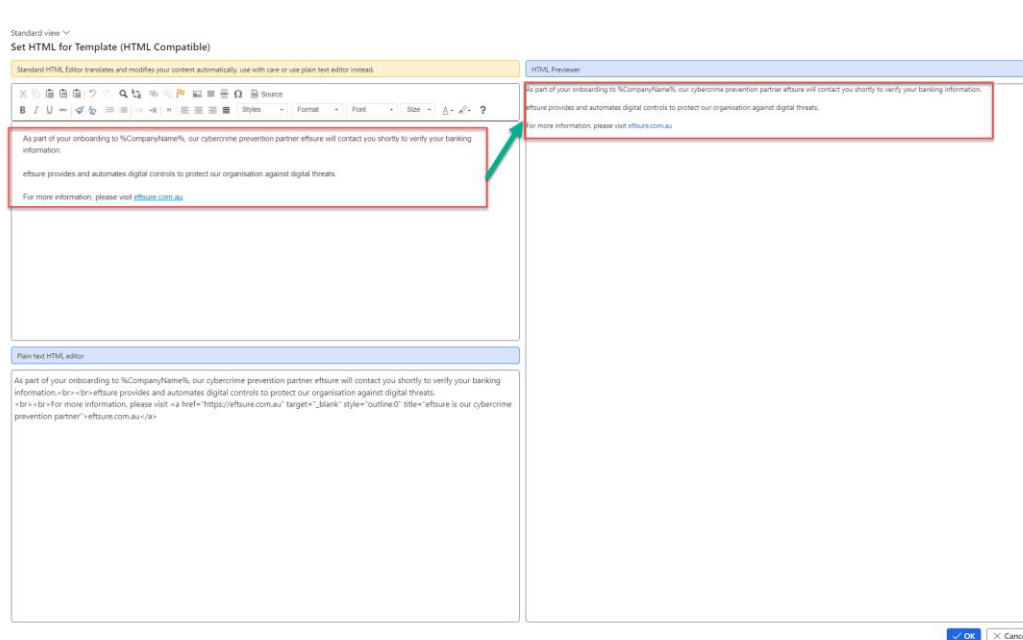
EMAIL BODY (SNIPPETS)

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.



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.



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.

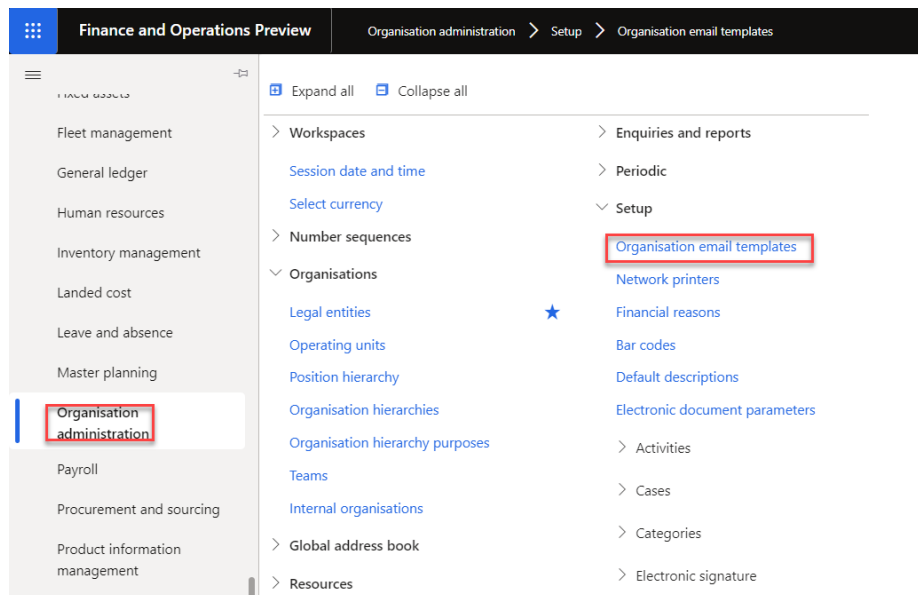
Please ensure to have %Message% at the end of the email if you wish to see the email body which is setup in Snippets.

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

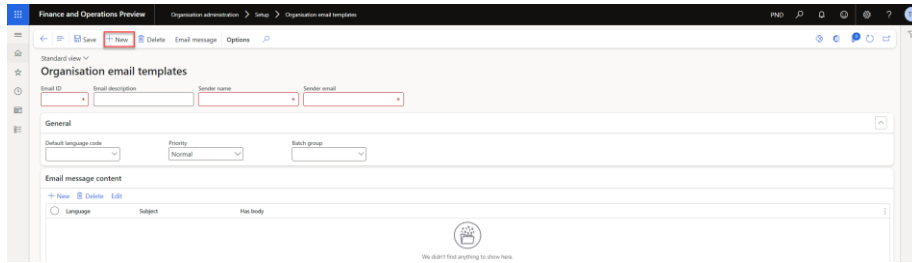
%Message%

EMAIL ID

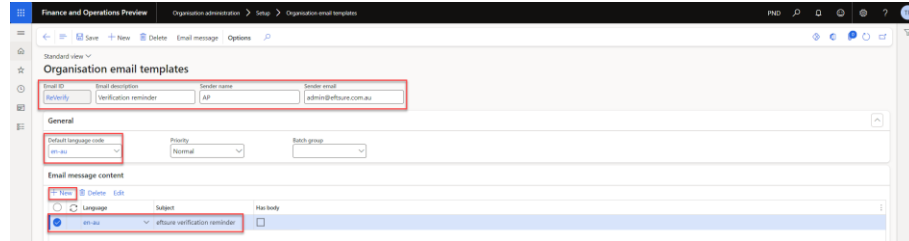
User can setup email ID from **Organisation administration > Setup > Organisation email templates**.



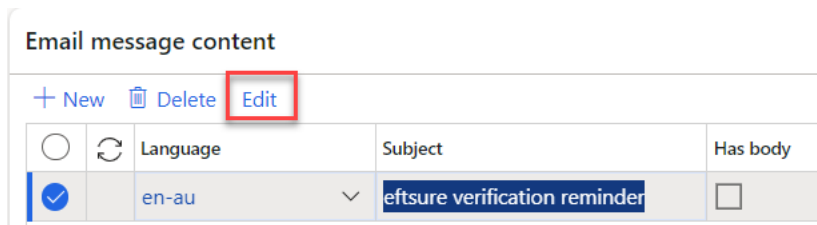
If there is no existing email ID, user can create new one dedicated to eftsure only.



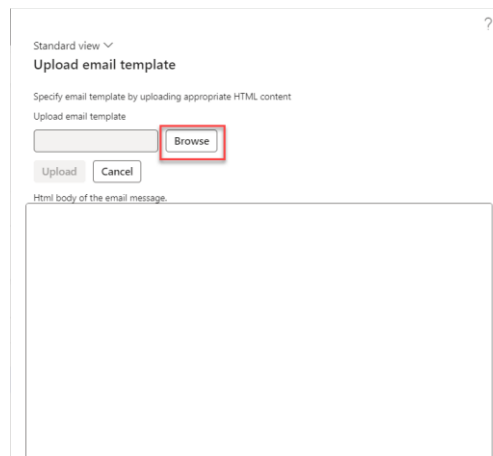
All mandatory fields will need to be filled in including Email message content.



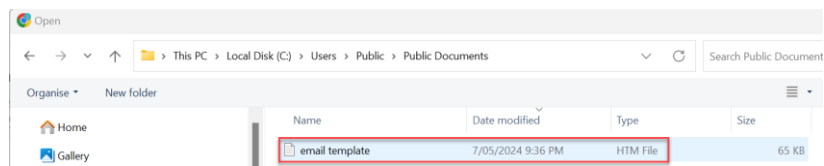
To include a default message for the email, user can use Edit button.




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.

Standard view 

Upload email template

Specify email template by uploading appropriate HTML content

Upload email template

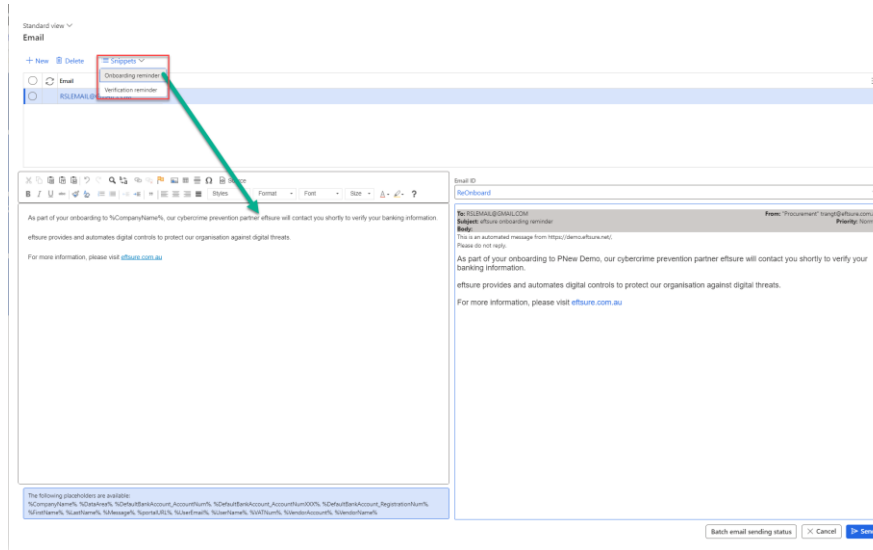
Html body of the email message.

This is an automated message from <https://demo.eftsure.net/>.
Please do not reply.
%Message%

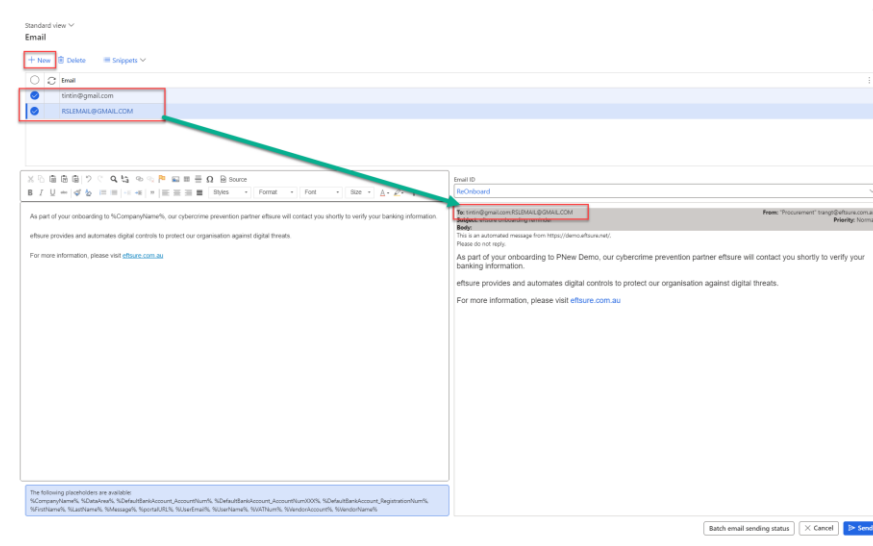
EMAIL FORM

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.

