

eftsure in D365 training checklist

Preparation

Activity/Task	Status	Note
System availability	☐	D365 training environment
User access eftsure portal	☐	Recommended roles: Customer-Supplier Onboarding, Supplier management, Supplier Self-Certification, Customer Api Access, Notifications
User access D365	☐	Eftsure user, eftsure self-certifier
Attendee	☐	Key users, Testers

User training checklist

Activity/Task	Status	Objective
Configure user credential in D365	☐	Setting user credential
User interface setup	☐	Personalise workspace setup with important information
Toolbar/Workspace	☐	Understand all functions, key features in eftsure workspace as well as other forms within D365
eftsure icon	☐	Main icons used within eftsure workspace and in different D365 modules
Eftsure OOTB Workflows	☐	Different type of standard workflows
Onboarding vendor	☐	Complete onboarding process from invite to onboarding form and onboarding status
Change request	☐	Complete change request process for existing vendor
Verification	☐	Bank account verification process for existing vendor
Check a Payee function	☐	Support functions to check vendor before onboarding
AP vendor payment	☐	How to complete vendor payment journal with eftsure validation
Help	☐	Where to find user manual and support documentations
Support	☐	How to log support ticket