Microsoft Dynamics® 365 Finance & Operations

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PROJECT MANAGEMENT

BUSINESS CONTEXT

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Implementing eftsure inside D365 F&O

Congratulations on purchasing eftsure inside D365 F&O

What do we do now?

Deployments
Training
VMF Verification
Go Live
Support

How?

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Implementing eftsure inside D365 F&O

Implementations can vary by multiple factors:

Size of VMF
Number of users
Segregation of duties
Design of onboarding forms
Complexity of processes
Additonal customisations

Features to enable:

Vendor collaboration,
GeoLocation
ABR/AusPayNet integration
Workflows
Integrations

Implementing eftsure inside D365 F&O

Tools available to help you Go Live successfully

Project management & Gantt charts
Change management
Documentation
Videos

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PROJECT DEMO

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Demo

New project

Create a new project from the eftsure methodology template

DETAILS

Id: Main

Description: "Know Your Payee" - Deployment methodology

Calendar:

Implementation: Small — 49 day(s) project

MILESTONES

Sales: Sun 11/8/2020 09:00:00 AM

Kickoff: Sun 12/6/2020 09:00:00 AM

UAT: Sun 1/3/2021 09:00:00 AM

Live: Sun 1/24/2021 09:00:00 AM

USER GROUPS

Project Managers

System administrators

Accounts payable managers

All Users

Developers

Testers

Finance and Operations Preview — Search for a page — PNC — GR

New activity | Delete | Zoom In | Zoom Out | Excel | Project | Activities | Tools | Options

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Projects | Timeline | Grid | Details | Styles | Markers

Step	Assigned
Sales	4 / 4
Change management	0 / 5
Deployment	2 / 5
Deploy DEV	SysAdmin
Configure DEV	SysAdmin
Deploy UAT	SysAdmin
Configure UAT	SysAdmin
Deploy PROD	SysAdmin
Verification	0 / 3
Training	0 / 7
eftsure portal	All
D365FO Day1	All

October 2020

24 26 28 30 02 04 06 08 10 12 14 16 18 20 22 24

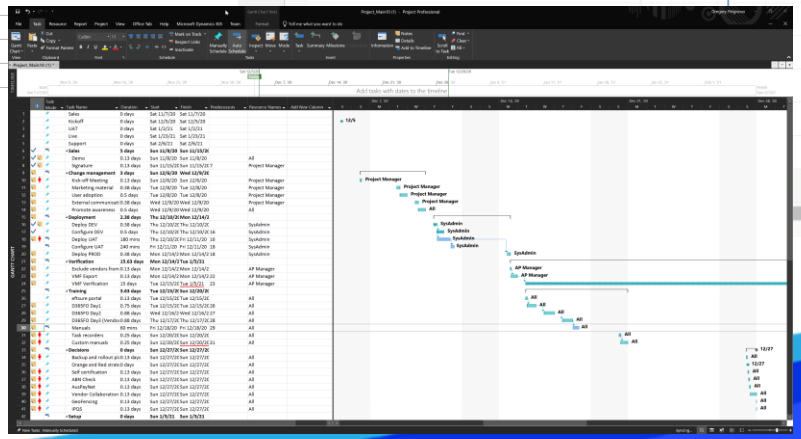
Kickoff

Promote awareness

Configuration of UAT environment

VMF Verification

D36



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Demo

- Project dashboard
- Creating a new project
- Managing a project in eftsure inside D365F&O
- Managing a project in Microsoft Project
- My tasks on the project(s)