

WHITE PAPER

Pre-approval onboarding

Eftsure inside Microsoft Dynamics 365 for F&O

Table of Contents

Introduction	2
Configuration requirement	2
Onboarding	2
Vendor groups	4
Process	6
Accessible	6
Onboarding	6
Appendix	9
System email templates	9
Setup User groups	9
Email history	10

Introduction

This document details the feature which will allow user to perform additional pre-approval workflow for onboarding process providing more internal control before onboarding invite is sent to vendor.

Configuration requirement

Before this feature can be used, initial configuration has to be completed by eftsure key user permission role.

Onboarding

With out of the box extension, standard onboarding with no pre-approval is default setting ie single user sending onboarding invite without approval and workflow.

Note: This configuration at global level for all legal entities

The screenshot shows the 'Parameters for eftsure' configuration page with the 'Onboarding' tab selected. The left sidebar lists various configuration categories, with 'Onboarding' highlighted. The main content area is divided into several sections: 'General' (with sub-sections like Banking options, Contact Information, Addresses, Forms, Field mappings, Contact info, Greeting, and Document management), 'DEFAULT VALUES' (with fields for First name, Organisation name source, Last name, and Bank account id prefix), 'NAMING CONVENTIONS' (with fields for Organisation name rule and Bank account id prefix), 'ONBOARDINGS' (with a toggle for 'Accept onboarding in the 'Await...''), and 'WORKFLOW' (with a dropdown for 'Invite method' set to 'Send synchronously'). A yellow warning box is visible in the 'ONBOARDINGS' section, stating: 'The verification team doesn't verify onboardings that have been accepted by the customer. So if a customer accepts an onboarding/change request before eftsure verifies the vendor, the team does not action these onboardings.'

If user wants to turn on the pre-approval workflow, “Save as draft” option will need to be selected.

No Approver

When no Approver group is selected, pre-approval workflow will still be triggered and moved to draft for review before sending onboarding invite.

Note: all of the above actions can be completed by the same user.

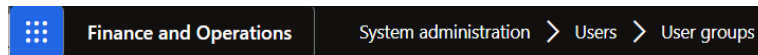
This screenshot shows the same 'Parameters for eftsure' configuration page, but with the 'WORKFLOW' section expanded. The 'Invite method' dropdown is now set to 'Save as draft', and the 'Approval' dropdown is set to 'Approval'. The 'ONBOARDINGS' section still shows the 'Accept onboarding in the 'Await...' toggle set to 'No'.

With Approver

When Approver group is selected, pre-approval workflow will be triggered and sent to approver within the group for review and send. Onboarding will be moved to Draft and changed to Pending status.

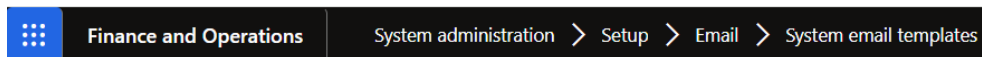
Note: More detail will be clarified in following Process > Onboarding section.

Approver/User groups will need to be setup accordingly. [Appendix setup user groups](#)



Email template

If user wants to create email template for pre-approval, it can be done by system admin.



Alternatively, user can use **Create email template** button to generate a ready template.

Sample email template is as below:



Invitation approval
for company.htm

With default email template, **View draft** link will bring approver directly to the record for review and approval within **efture** workspace.

Email Type

Email type can be selected either by using 1-sender email or 2-User login (Alias).

User can review email sent via below menu path.

Vendor groups

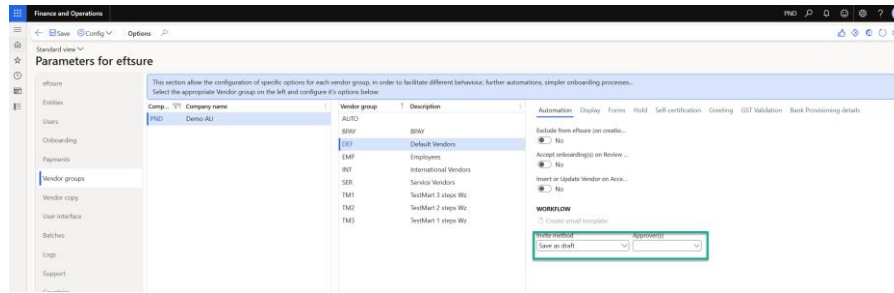
Same as configuration in Onboarding, out of the box extension will be standard onboarding with no pre-approval is default setting ie single user sending onboarding invite without approval and workflow.

Note: This configuration at company and vendor group level.

No Approver

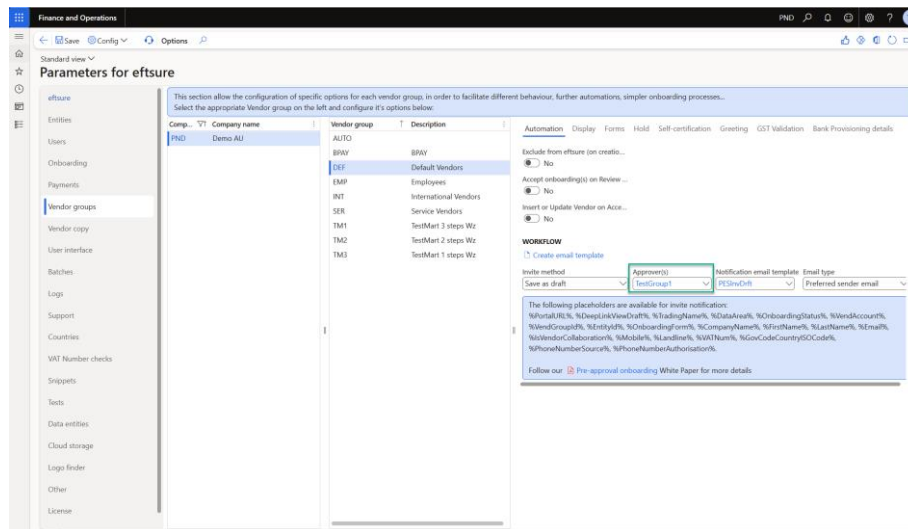
When no Approver group is selected, pre-approval workflow will still be triggered for selected company, vendor group and moved to draft for review before sending onboarding invite.

Note: all of the above actions can be completed by the same user.



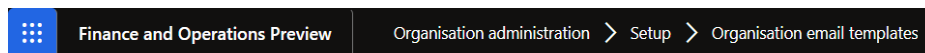
With Approver

When Approver group is selected, pre-approval workflow for selected company/vendor group will be triggered and sent to approver within the group for review and send. Onboarding will be moved to Draft and changed to Pending status.

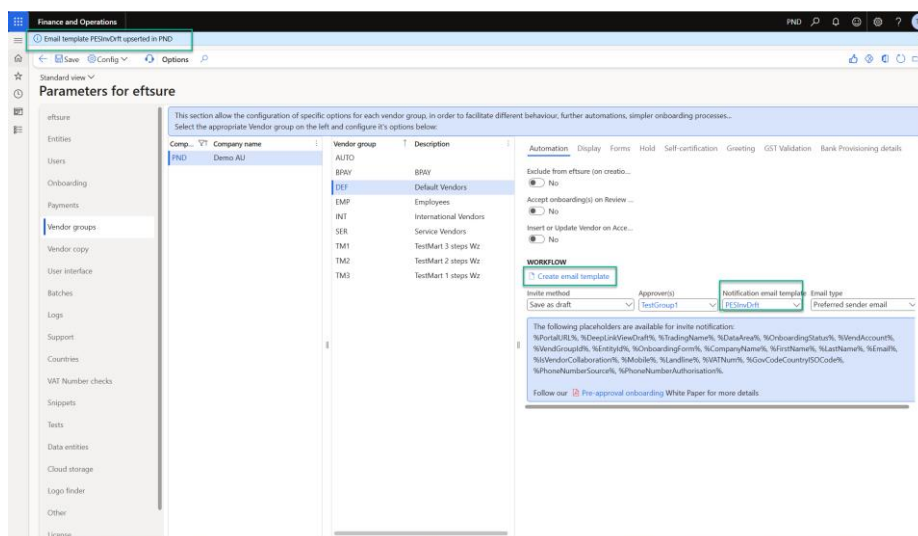


Email template

If user wants to create Organisation email template for pre-approval, it can be done by system admin.



Alternatively, user can use **Create email template** button to generate a ready template.



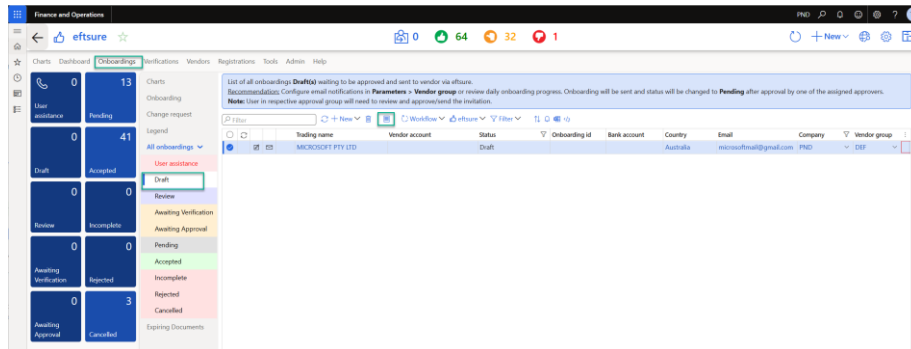
Email Type

Same as [Onboarding > Email type](#) setup

Process

Accessible

There is an additional tab/status **Draft** under **eftsure workspace > Onboardings**. This is the tab where all approver should use to review and send onboarding.

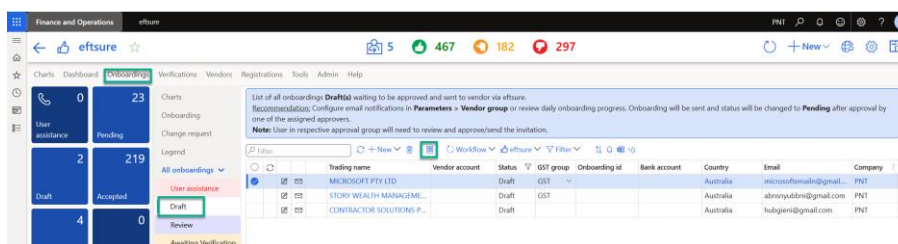


Onboarding

Once pre-approval workflow is enabled, once standard **Onboarding** button is selected, we will generate onboarding from with default information as per Parameter. For more detail, please refer to User Guide.

Instead of **Send Invite** button, it has been changed to **Send for review** to trigger pre-approval workflow.

Approver can review onboarding form via below button.



Draft onboarding form will include requester name and date as well as onboarding greeting which vendor will receive.

Draft:

Created on 29/10/2024 by trang
 From: Default Name
 Company: MICROSOFT PTY LTD
 Contact: Business Owner - microsoft@mail@gmail.com
 Mobile: 041522122
 Landline: 0185079932
 Phone number authentication: Yes
 Source: New device email

MICROSOFT PTY LTD - ABN: 29 002 589 460
 Active since 1946/08/08 - GST: 19/10/2009
 Type: Australian Private Company
 Main business location: NSW 2200

Business name(s):
 MICROSOFT AUSTRALIA

Get EFT details directly from bank: Yes
 Enter EFT details manually: Yes
 Allow international bank accounts: No
 Allow card/cheque/BPFA/other: No

Message:
 Dear Business Owner at MICROSOFT PTY LTD (29 002 589 460),
 You have been invited by "Company Name" to become an official supplier.
 Please go through the onboarding process linked below to be added as a supplier into our systems.
 If you have any questions, please contact us by:
 Email: account@company.com or
 Phone: 0415030000
 Regards,
 Company Name (29 669 911 776)
 12 test road
 NSW 2217
 AUS

Workflow Cancel

Once draft onboarding form is reviewed, onboarding form can be sent or cancel using Workflow button.

Finance and Operations

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Charts Dashboard Onboardings Verifications Vendors Registrations Tools Admin Help

Onboarding: 13
 Draft: 1
 User assistance: 41
 Review: 0
 Incomplete: 0
 Awaiting Verification: 0
 Awaiting Approval: 0
 Pending: 0
 Accepted: 0
 Rejected: 0
 Cancelled: 3
 Expiring Documents: 0

List of all onboardings (Drafts) waiting to be approved and sent to vendor via eftsure.
 Recommendation: Configure email notifications in **Parameters > Vendor group** or review daily onboarding progress. Onboarding will be sent and status will be changed to **Pending** after approval by one of the assigned approvers.
 Note: User in respective approval group will need to review and approve/send the invitation.

Trading name	Vendor	STATUS	Status	Onboarding id	Bank account	Country	Email	Company	Vendor group
MICROSOFT PTY LTD		Draft	Draft			Australia	microsoft@mail@gmail.com	PND	DEF

Send Cancel

1 Approver(s) in group: **TestGroup**: Admin (Admin), Supervisor (Supervisor), Trang (Trang)

Note: If you are not in the Approver group, Send button will be disabled.

Finance and Operations

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Charts Dashboard Onboardings Verifications Vendors Registrations Tools Admin Help

Onboarding: 23
 Draft: 3
 User assistance: 219
 Review: 4
 Incomplete: 0
 Awaiting Verification: 0
 Awaiting Approval: 0
 Pending: 0
 Accepted: 0
 Rejected: 0
 Cancelled: 0
 Expiring Documents: 0

List of all onboardings (Drafts) waiting to be approved and sent to vendor via eftsure.
 Recommendation: Configure email notifications in **Parameters > Vendor group** or review daily onboarding progress. Onboarding will be sent and status will be changed to **Pending** after approval by one of the assigned approvers.
 Note: User in respective approval group will need to review and approve/send the invitation.

Trading name	Vendor	STATUS	Status	GST group	Onboarding id	Bank account	Country
MICROSOFT PTY LTD		Draft	Draft	GST			Australia
STORY WEALTH MANAGEM...		Draft	Draft	GST			Australia
CONTRACTOR SOLUTIONS P...		Draft	Draft				Australia

Send Cancel

Once onboarding is sent, onboarding status will be changed to Pending ie email is sent to vendor.

Finance and Operations

Invitation for MICROSOFT PTY LTD - microsoftemail@gmail.com Onboarding sent

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5 467 182 297

Charts Dashboard Onboardings Verifications Vendors Registrations Tools Admin Help

Charts

Onboarding

Change request

Legend

All onboardings

User assistance

Draft

Review

Awaiting Verification

Awaiting Approval

Accepted

Incomplete

Rejected

Cancelled

Expiring Documents

List of all onboardings which have been sent to vendors and waiting for response.
Recommendation: Wait for vendors to respond or use Email feature in eftsure menu to send reminder directly to vendors.

Filter

+ New

Workflow

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Filter

Trading name

Vendor account

Status

GST group

Onboarding id

Bank account

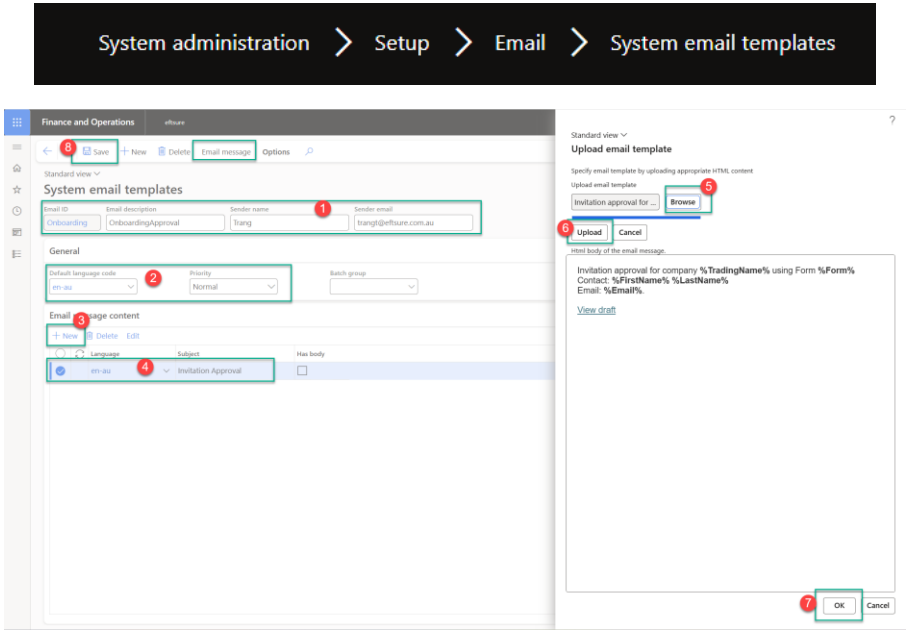
Country

MICROSOFT PTY LTD		Pending	GST	112441		Australia
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Approved: trang

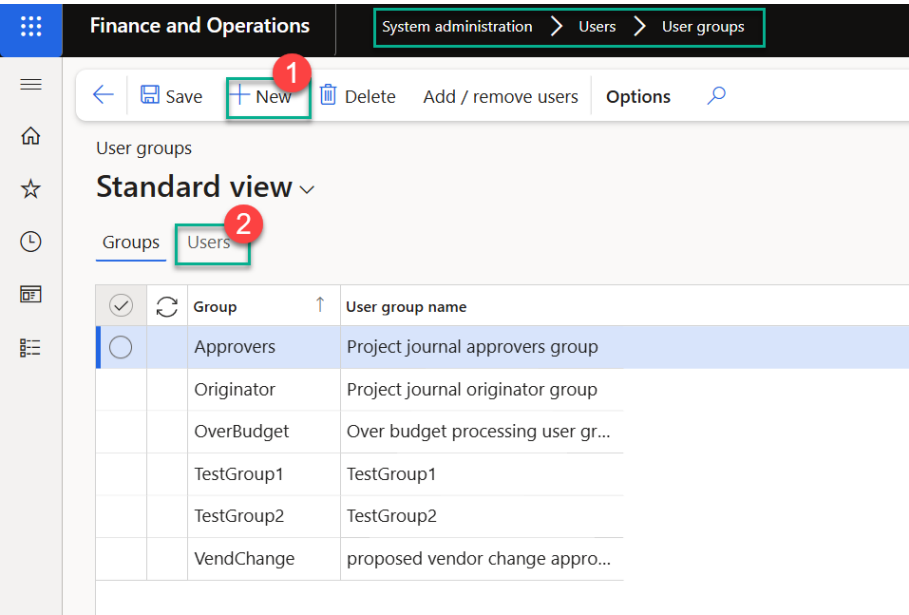
Appendix

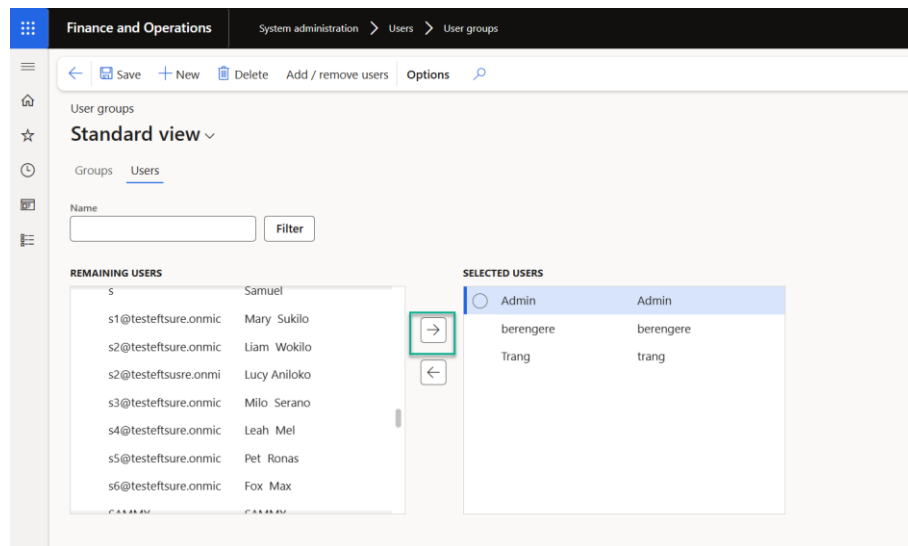
System email templates



Note: Email template body should be in HTML format.

Setup User groups





Email history

User can also view email status and history via below.

