

WHITE PAPER

Pre-approval onboarding

Eftsure inside Microsoft Dynamics 365 for F&O

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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.

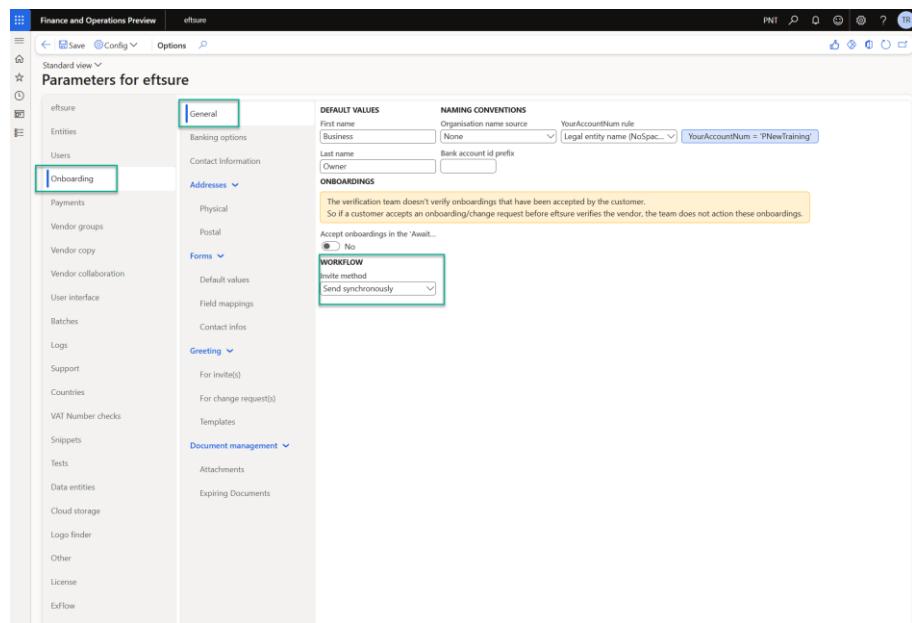
Configuration requirement

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

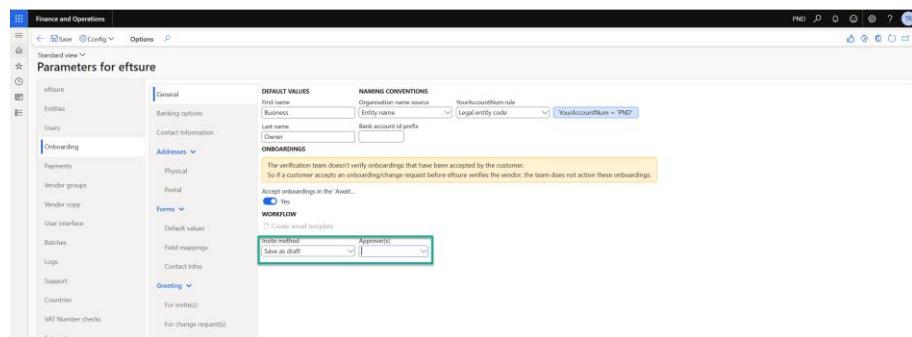


If user wants to turn on the pre-approval workflow, "Save as draft" option will need to be selected.

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.

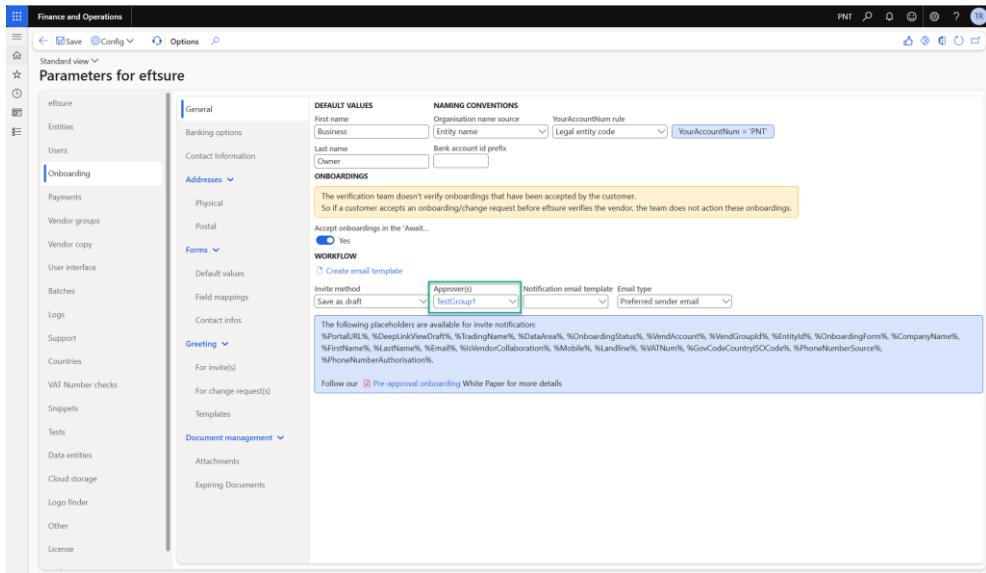
Note: all of the above actions can be completed by the same user.



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](#)

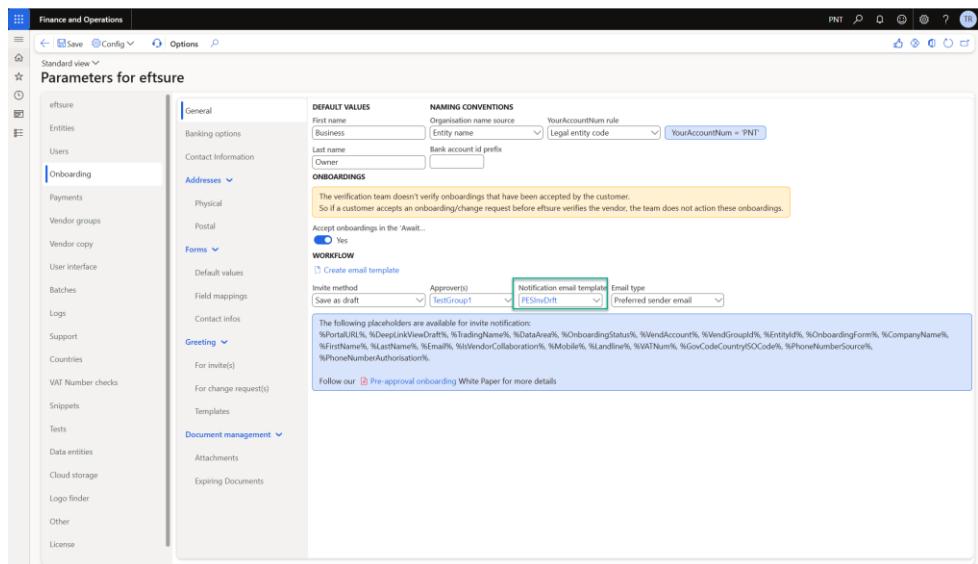


Email template

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:

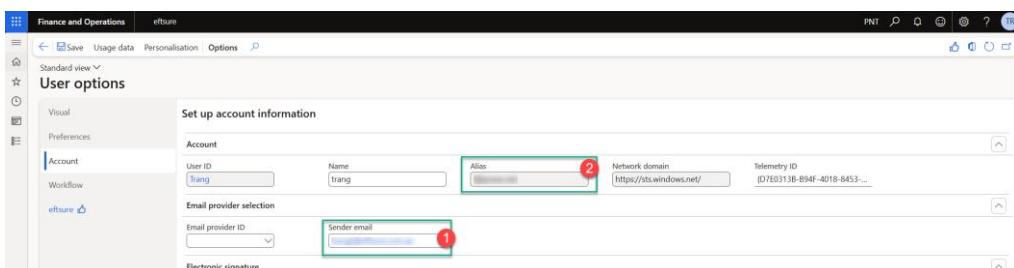
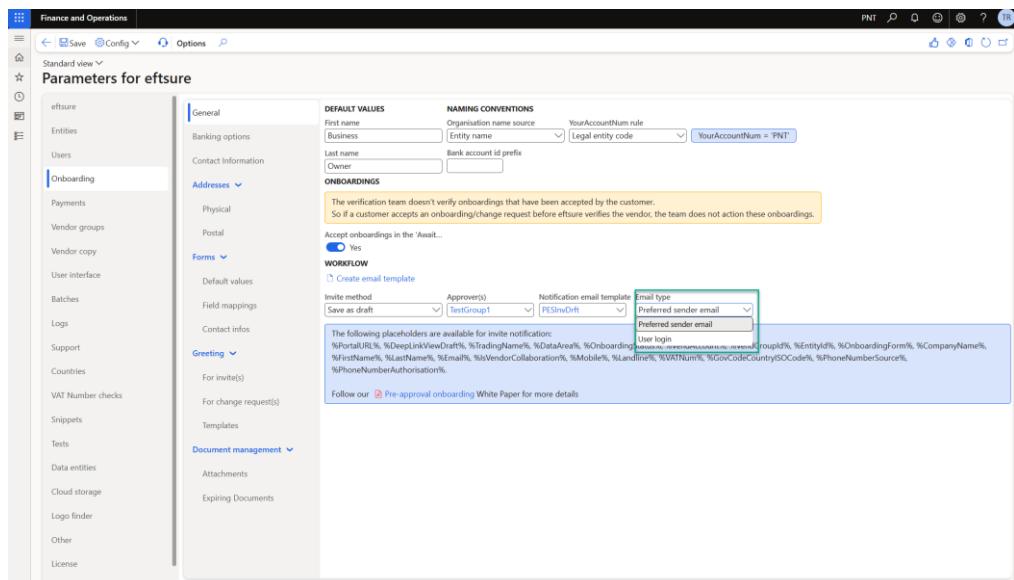


Invitation approval
for company.htm

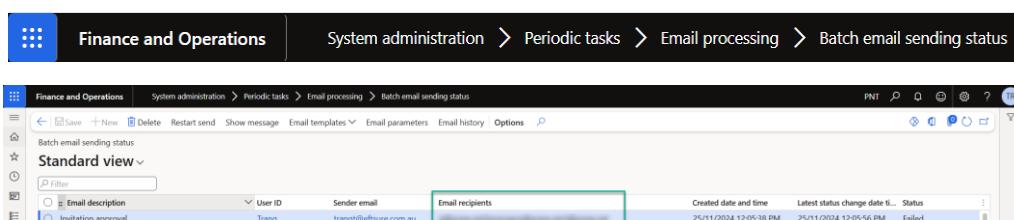
With default email template, **View draft** link will bring approver directly to the record for review and approval within **efture** workspace.

Email Type

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



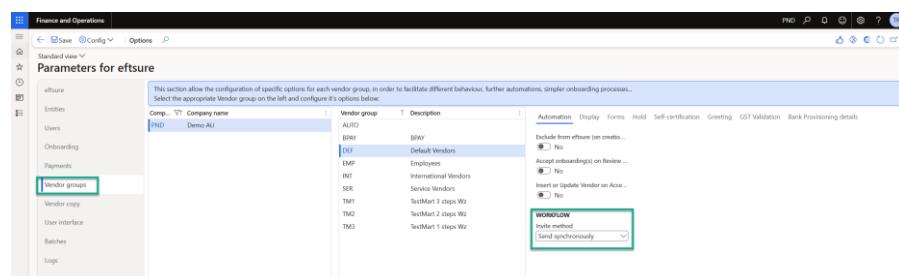
User can review email sent via below menu path.



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.

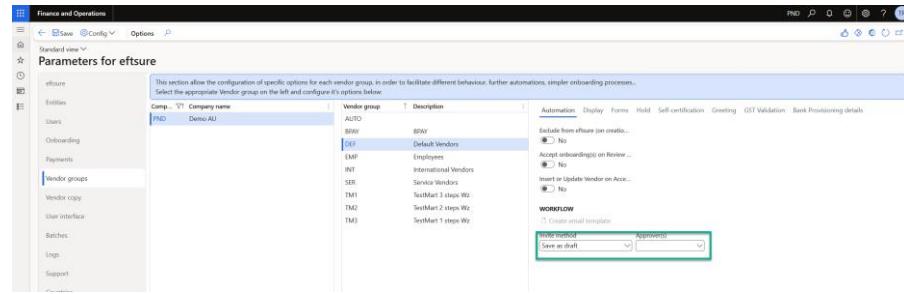
Note: This configuration at company and vendor group level.



No Approver

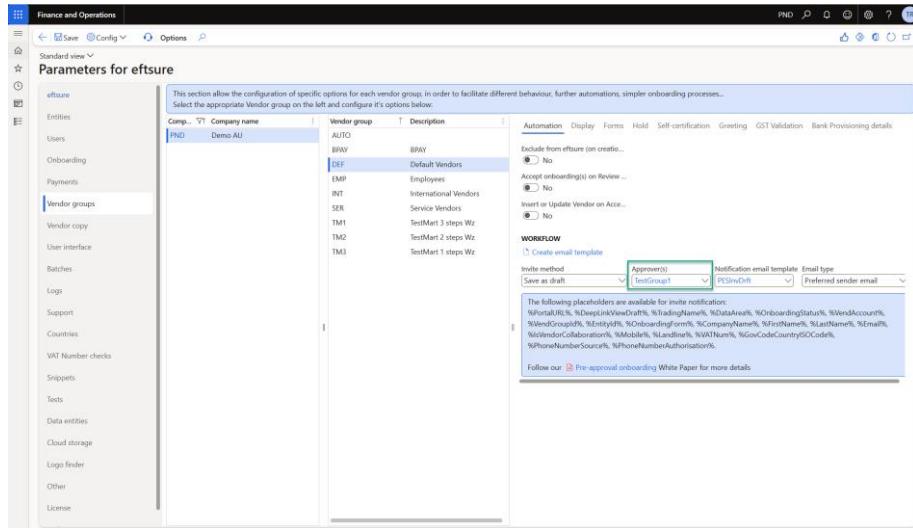
When no Approver group is selected, pre-approval workflow will still be triggered for selected company, vendor group and moved to draft for review before sending onboarding invite.

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.

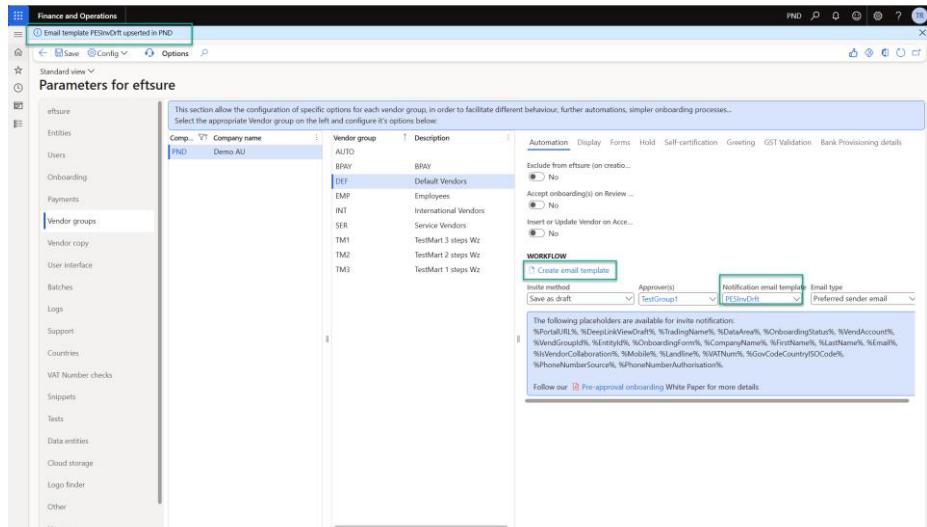


Email template

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.

MICROSOFT PTY LTD

Draft

Created on 29/06/2014 by trang
Form: Default Form
Company: MICROSOFT PTY LTD
Contact: Microsoft Dealer - microsoftmail@gmail.com
Mobile: 0411021122
Last modified: 29/06/2014
Phone number authentication: Yes
Source: New invoice email: Yes

MICROSOFT PTY LTD - ABN 29 002 589 460
Active since 05/04/2008 - GST 10372000
Type: Private Company
Main business location: NSW 2000

Business name: MICROSOFT AUSTRALIA

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

Message:
Dear Business Owner at MICROSOFT PTY LTD [29 002 589 460],
You have been invited by "CompanyName" 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: 0000000000
Regards,
Company Name [55 669 911 771]
12 test road
NSW 2217
AU

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

Onboardings

efsture

Workflow

Send

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

efsture

Workflow

Send

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

eftsure 5 467 182 297

Charts Dashboard Onboardings Verifications Vendors Registrations Tools Admin Help

Charts Onboarding Change request

User assistance 0 23 Pending

Draft 3 219 Accepted

Review 4 0 Incomplete

Awaiting Verification 0 0 Rejected

Awaiting Approval 0 389 Cancelled

Legend All onboardings User assistance Draft Review Awaiting Verification Awaiting Approval Pending Accepted Incomplete Rejected Cancelled Expiring Documents

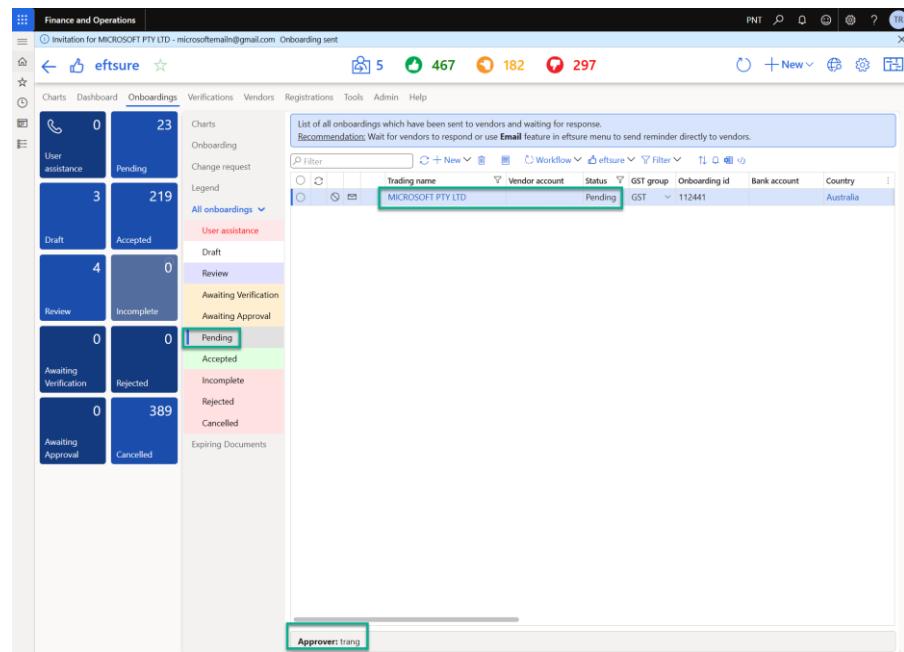
List of all onboardings which have been sent to vendors and waiting for response.
Recommendation: Wait for vendors to respond or use Email feature in eftsure menu to send reminder directly to vendors.

Filter + New Workflow eftsure Filter

Trading name Vendor account Status GST group Onboarding id Bank account Country

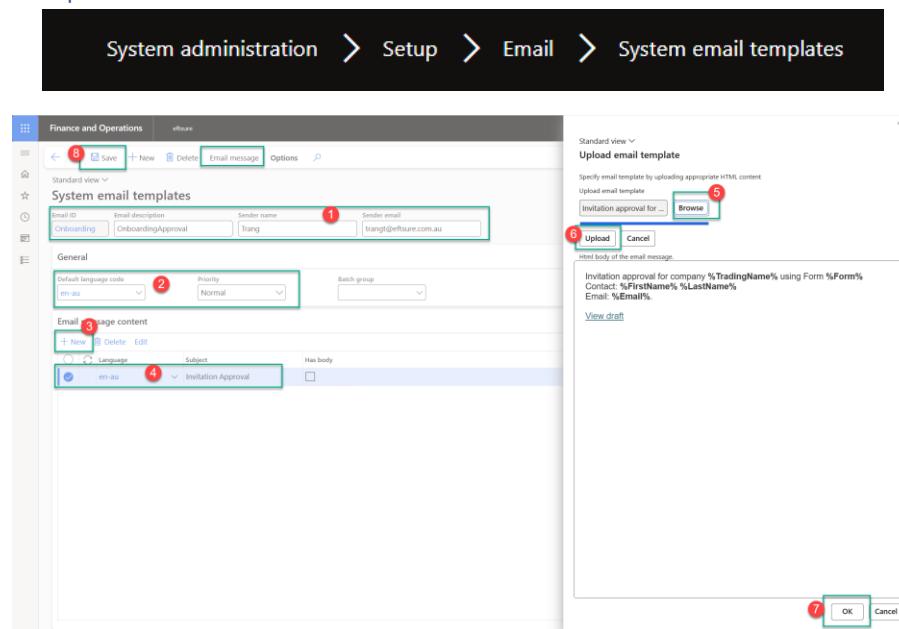
MICROSOFT PTY LTD Pending GST 112441 Australia

Approver: trang



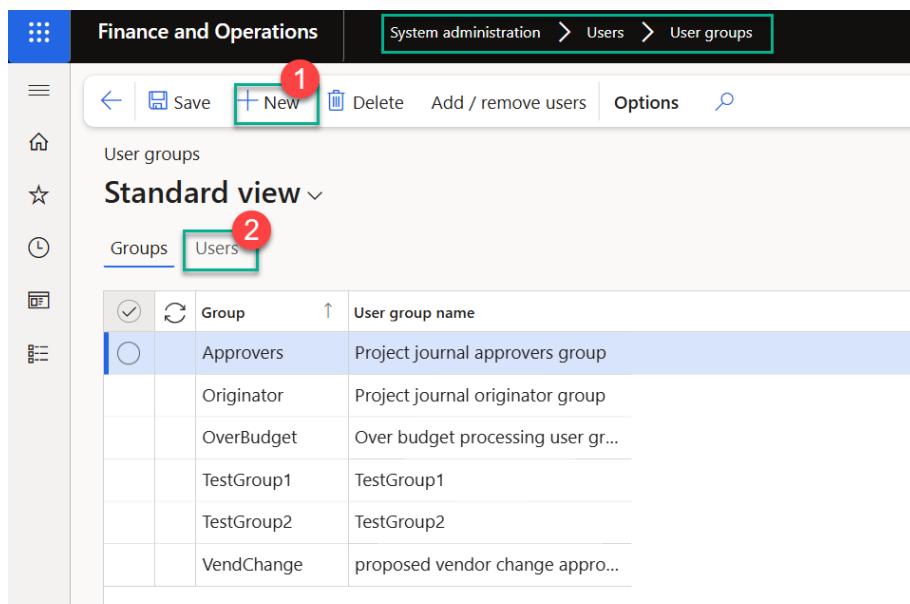
Appendix

System email templates



Note: Email template body should be in HTML format.

Setup User groups



User groups

Standard view

Groups Users

Name Filter

REMAINING USERS

S	Samuel
s1@testftsure.onmic	Mary Sukilo
s2@testftsure.onmic	Liam Wokilo
s2@testftsure.onmic	Lucy Aniloko
s3@testftsure.onmic	Milo Serano
s4@testftsure.onmic	Leah Mel
s5@testftsure.onmic	Pet Ronas
s6@testftsure.onmic	Fox Max

SELECTED USERS

Admin	Admin
berengere	berengere
Trang	trang

Email history

User can also view email status and history via below.

Finance and Operations

System administration > Setup > Email > Email history

Standard view

Email history

Email description	User ID	Sender email	Email recipients	Created date and time	Latest status change date	Status
Invitation approval	Trang	trang@ftsure.com.au	greg@ftsure.com.au;berengere@ftsure.com.au;nettrang@ftsure.com.au	29/10/2024 5:47:48 PM	29/10/2024 5:47:57 PM	...
Invitation approval	Trang	trang@ftsure.com.au	greg@ftsure.com.au;berengere@ftsure.com.au;nettrang@ftsure.com.au	29/10/2024 5:46:07 PM	29/10/2024 5:46:05 PM	...

Standard view

Email identifier: invitation approval

Sender email: trang@ftsure.com.au Subject: Invitation approval

Email recipients: greg@ftsure.com.au;berengere@ftsure.com.au;nettrang@ftsure.com.au

Invitation approval for company MICROSOFT PTY LTD using Form Default Form Contact: Business Owner Email: microsoftmail@gmail.com

[View detail](#)