



# **White Paper**

## **Support**

**Eftsure inside Microsoft Dynamics 365 for F&O**

## Change History

Version	Date	Change Summary	Author
1.0	22/12/2023	Initial draft for beta version	Trang
1.1	29/03/2025	Updates for Key User Support	Greg

## Table of contents

Introduction.....	2
Accessibility.....	2
Screenshot.....	3
Context.....	3
Support mode .....	3
Key user Support Mode.....	4
eftsure Support Mode.....	4
Attachments.....	6
Trace.....	6

# INTRODUCTION

This white paper will walk you through how to use the support feature within eftsure extension.

The main purpose of this feature is to improve troubleshooting process by providing more sufficient information on issue and avoiding unnecessary communications.

This feature is available in 2 different flavours, depending on the user's permissions:

**Key users** can raise tickets with **eftsure support** for issues or bugs.

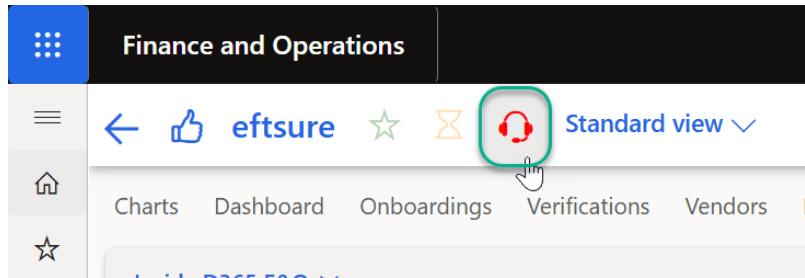
**End users** can send requests to their **key users**, who can escalate to **eftsure support** if needed.

Some common errors due to configuration or incorrect process which can be viewed in **eftsure inside D365 F&O - Common Errors – White paper**.

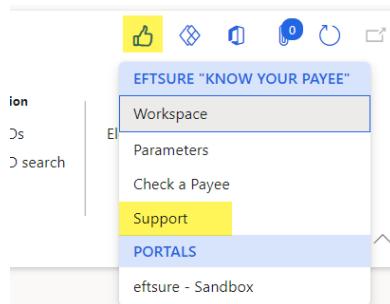
**Important:** For **urgent verifications**, please use our Urgent Verification tool instead.

# ACCESSIBILITY

Our support feature can easily be accessed from **eftsure workspace** using the red headset icon.



The feature is also available in any D365 form (eftsure enabled) where the eftsure ribbon icon  is available.



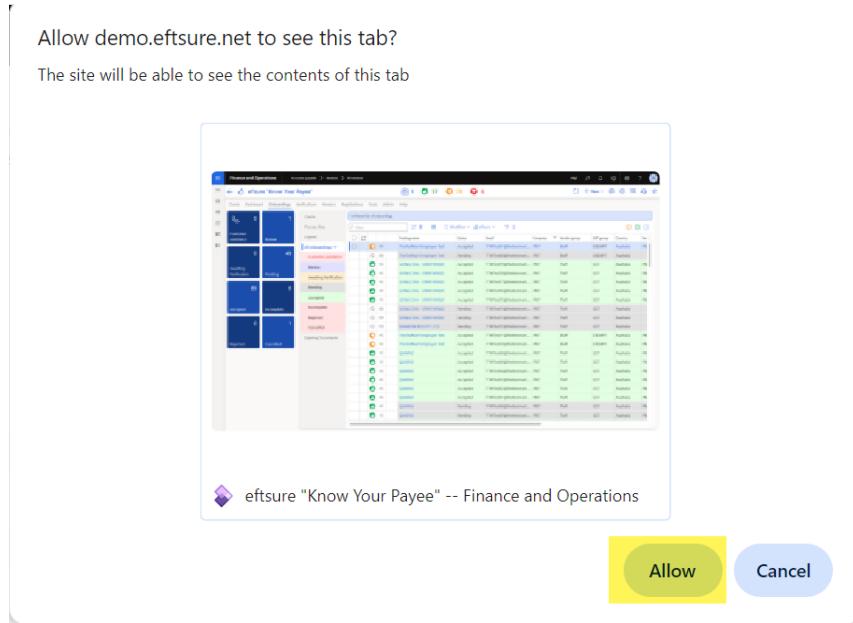
This feature is also available in many other forms where the eftsure ribbon icon is not available (Wizards, Dialogs, etc.)

# SCREENSHOT

Upon clicking on the **Support** button, an attempt to take a screenshot of the current screen will be performed, resulting in a user prompt to approve the capture. The user can **cancel** the request for business/confidentiality reasons, however screenshots help the receiver to troubleshoot your issues.

If the screenshot permission is allowed, a screenshot image will appear in the attachment list.

If the screenshot is cancelled, no screenshot will be attached to the support request.



# CONTEXT

This feature is context aware and will attempt to provide the context alongside the support request.

If a vendor, bank account, onboarding is currently selected, its details will be passed along.

Similarly, if the selected record is a webservice log or trace, it will be automatically added as attachment. This is especially useful to provide additional information to facilitate troubleshooting.

# SUPPORT MODE

Support mode depends on user permissions.

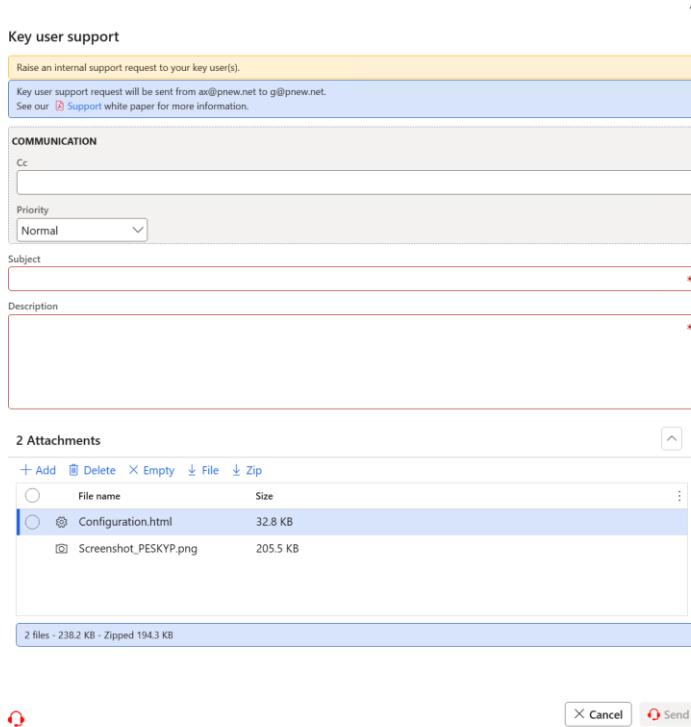
If the user has been granted **eftsure administrator** role, support feature will behave as **eftsure** support.

Otherwise, support feature will behave as **key user** support.

## KEY USER SUPPORT MODE

**End users** can submit issues to their **key user**. The support form will appear in **simplified** mode where the end user can enter a subject and a description for the issue.

Upon sending the issue, a new email will be added to the D365 outgoing email queue, sent from the current user to the internal key user (configured in eftsure workspace > Parameters > Support).



The screenshot shows the 'Key user support' form. At the top, there is a note: 'Raise an internal support request to your key user(s). Key user support request will be sent from ax@pnew.net to g@pnew.net. See our [Support](#) white paper for more information.' Below this is a 'COMMUNICATION' section with 'Cc' and 'Priority' (set to 'Normal'). The 'Subject' and 'Description' fields are present, both marked with a red asterisk. Below these is an 'Attachments' section showing two files: 'Configuration.html' (32.8 KB) and 'Screenshot\_PESKYP.png' (205.5 KB). The total size is 238.2 KB zipped to 194.3 KB. At the bottom are 'Cancel' and 'Send' buttons.

## EFTSURE SUPPORT MODE

**Key users** can submit technical issues to eftsure support team for triage and answer according to the customer's SLA. Upon sending the issue, a ticket will be created into eftsure's Zendesk ticket system and an automatic answer will acknowledge the receipt of your issue. A support engineer will shortly respond to attend to your issue.

For Key users, the advanced version of the tool will be displayed. Further details should be entered.

### Create support request

Alternatively or in case of [outage](#), you can also reach eftsure support via:

- **Urgent Verifications:** [urgentverifications@eftsure.com.au](mailto:urgentverifications@eftsure.com.au)
- **Customer Support:** [customersupport@eftsure.com.au](mailto:customersupport@eftsure.com.au)
- **Call** 1300 985 976
- **Visit** [contact page](#)

COMMUNICATION	VENDOR	
Phone	SupplierCode	
Cc	Onboarding id	
<input type="text" value="gregp@eftsure.com.au"/>	<input type="text"/>	
Subject	<input type="text"/>	
Description		
<input type="text" value="Batch history - Update 1464 =&gt; 2000"/>		
User		
User ID	User name	eftsure username
<input type="text" value="Admin"/>	<input type="text" value="Admin"/>	<input type="text" value="Admin705"/>
2 Attachments		
<a href="#">+ Add</a> <a href="#">Delete</a> <a href="#">X Empty</a> <a href="#">↓ File</a> <a href="#">↓ Zip</a>		
<input type="radio"/>	File name	Size
<input type="radio"/>	Configuration.html	35.7 KB
<input type="radio"/>	Screenshot_PESKYP.png	223.3 KB
<input type="text" value="2 files - 259.0 KB - Zipped 208.9 KB"/>		
Logs		<input type="text"/>
Trace		<input type="text"/>



[Cancel](#) [Send](#)

The following additional details will be collected:

Vendor or onboarding identification (if applicable)

User (Leave empty if issue applies to all users)

User will need to input minimum 20 characters in these mandatory fields which will assist support team to investigate.

## ALTERNATE SUPPORT

The D365 Support tool is the recommended approach to engage with eftsure support as it provides a lot of information to help troubleshoot our customers issues.

In case of [outage](#), you can also reach eftsure support via:

- **Urgent Verifications:** [urgentverifications@eftsure.com.au](mailto:urgentverifications@eftsure.com.au)
- **Customer Support:** [customersupport@eftsure.com.au](mailto:customersupport@eftsure.com.au)
- **Call** 1300 985 976
- **Visit** [contact page](#)

## ATTACHMENTS

An attachment section will list all files attached to the support request. Although some attachments are auto-generated, the user is encouraged to provide as much information as possible to minimise troubleshooting/resolution duration.

Amongst others, a copy of the current configuration is attached by default.

Please consider attachment(s) size before sending. In most cases, attachments over 20Mo are rejected by email servers,

## TRACE

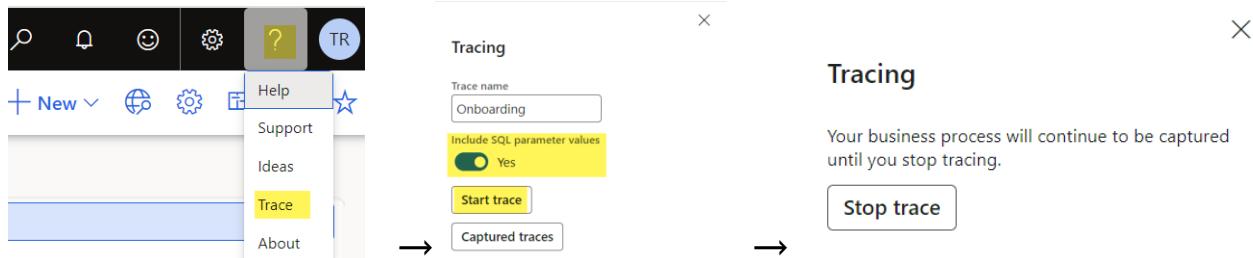
In most scenarios, it is best to provide a trace of any technical issue to facilitate the investigation,

A trace contains a capture of the execution of a time range that can be used to investigate your issue.

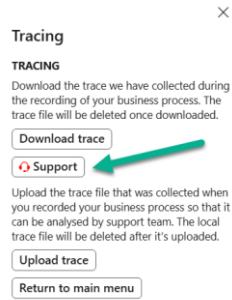
Tracing is a standard D365 F&O feature, for more information please refer to official MS document <https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/trace-trace-tutorial>

**Note:** the user taking the trace will need to be granted tracing permission in the matching environment. The administrator can also grant rights to other users to take a trace.

All steps to re-produce the issue should be performed a first time before running the trace. After reproducing the issue, start the trace, perform the action a second time and stop the trace.



Once the trace has been stopped, the following actions are available:



**Download trace** – Store the captured trace on a local machine. You can analyse a downloaded trace by using the desktop version of Trace parser.

**Support** – Open eftsure support feature, attaching current trace to the support request.

**Upload trace** – Store the trace in the cloud for later download by, for example, the admin. Uploaded traces are automatically deleted after seven days. They can also be manually deleted from the Captured traces page.

**Return to main menu** – Return to the main tracing menu to start another trace.

Trace			
<a href="#">Attach</a>		<a href="#">Download trace</a>	
Trace name	Traced by	Trace started	:
Onboarding	Trang	21/12/2023 5:46:14 PM	