eftsure in D365 training checklist

Preparation

Activity/Task	Check	Note
System availability	☐	D365 UAT or training environment
User access eftsure sandbox portal	☐	Recommended roles: Customer-Supplier Onboarding, Supplier Self-Certification, Supplier management, Customer Api Access, Notifications
User access D365	☐	System admin access, eftsure Key user, eftsure self-certifier
Attendee	☐	Super key users, IT system admin (for roles/permission), Consultant responsible for Go-Live

Technical training checklist

Activity/Task	Status	Objective
Admin account	☐	Admin account with API access for batches
Onboarding form	☐	Ensure relevant forms are created in eftsure portal with required questions
Greeting invite	☐	Review and define Greeting email for onboarding, change request
Payment method	☐	Enable eftsure for all EFT related method of payment
Default payment method	☐	Setting method of payment for each legal entity
Vendor group	☐	UI functions for each vendor group including automation, editable onboarding options (wizard steps)
User interface	☐	Option to hide by modules, functions
Batches	☐	Setup batches
Logs	☐	Webservice logs for investigation
Registration GUID	☐	GUID for ABN and GST look up
License	☐	License
Exclude vendor group	☐	Exclude vendor group before enable entity
Init legal entity	☐	Calculates all supplier codes on bank accounts to generate unique vendor reference
Sync From/To eftsure	☐	Reconcile data between D365 & eftsure
Enable legal entity	☐	Enable eftsure in selected legal entity
Export/Import Configuration	☐	Export and import configuration DB refresh, new environment
Eftsure workspace > Admin	☐	API calls, batch histories
Eftsure workspace > Tools	☐	Before Go-Live tools/data cleansing