

eftsure in D365 training checklist

Preparation

Activity/Task	Status	Note
System availability	<input type="checkbox"/>	D365 training environment
User access eftsure portal	<input type="checkbox"/>	Recommended roles: Customer-Supplier Onboarding, Supplier management, Supplier Self-Certification, Customer Api Access, Notifications
User access D365	<input type="checkbox"/>	Eftsure user, eftsure self-certifier
Attendee	<input type="checkbox"/>	Key users, Testers

User training checklist

Activity/Task	Status	Objective
Configure user credential in D365	<input type="checkbox"/>	Setting user credential
User interface setup	<input type="checkbox"/>	Personalise workspace setup with important information
Toolbar/Workspace	<input type="checkbox"/>	Understand all functions, key features in eftsure workspace as well as other forms within D365
eftsure icon	<input type="checkbox"/>	Main icons used within eftsure workspace and in different D365 modules
Eftsure OOTB Workflows	<input type="checkbox"/>	Different type of standard workflows
Onboarding vendor	<input type="checkbox"/>	Complete onboarding process from invite to onboarding form and onboarding status
Change request	<input type="checkbox"/>	Complete change request process for existing vendor
Verification	<input type="checkbox"/>	Bank account verification process for existing vendor
Check a Payee function	<input type="checkbox"/>	Support functions to check vendor before onboarding
AP vendor payment	<input type="checkbox"/>	How to complete vendor payment journal with eftsure validation
Help	<input type="checkbox"/>	Where to find user manual and support documentations
Support	<input type="checkbox"/>	How to log support ticket