



EASYDOX - IT'S *EASY!*

USER MANUAL

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1 About

EasyDoxs is an ISV that was created to design rich emailing solution for Microsoft Dynamics 365 Finance & Operations.

Using EasyDox you can simply setup professional branding to your outgoing business emails from Microsoft Dynamics 365 Finance and Operations. It is an easy yet efficient tool for your team to add professional look to your business emails sent directly from your ERP. Simply plug in and start branding your emails from Day One.

Key highlights:

1. Designed for Business
2. Not just No Code solution but NO Configuration / Setup
3. Go Live on Day One - Learn from our experts.
4. Built in security roles
5. Works across ALL modules and ALL standard reports
6. Easily combine your marketing artefacts from across multiple platforms - Not just from your ERP.

2 Sample Gallery

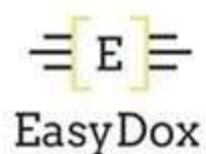
Check out some of the cool examples and comparisons with standard D365FO in below gallery.



Payment Advice from EasyDox



Dear Nitin,
We have processed the payment for your invoices.
Please find attached the payment advice for the same. Please let us know if you have any questions.
Best Regards,
Accounts Payables
EasyDox Pty Ltd.
156, Document Street, Easy Park, Victoria 3900, Australia
W: [EasyDox](#)
M: 0061431366329



Customer Statement



Nitin Patil
To Nitin Patil



2:43 PM



Your customer statement as at 8/31/2022



Nitin Patil
To Nitin Patil



Fri 12/08



Dear ,

Please find attached your account statement from **EasyDox**.

Thank you for your business **EasyDox**.

Please complete this [survey](#) to participate in a lucky draw to win a **\$100 Amazon Gift Card!!**

Best Regards,

Accounts Payables
EasyDox
W: www.OjasBusinessSystems.com
M: 0061431366329



Invoice



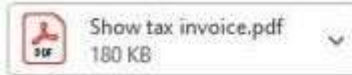
Nitin Patil

To: Nitin Patil



Sat 2:53 PM

If there are problems with how this message is displayed, click here to view it in a web browser.



Your invoice from EasyDox



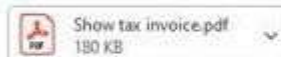
Nitin Patil

To: Nitin Patil



5:04 PM

If there are problems with how this message is displayed, click here to view it in a web browser.



Dear Nitin Patil,

Please find attached your invoice from EasyDox.

Thank you for your business.

Please check out our new range of products at [Products | Ojas Business Systems](#)

For latest updates on our promotions follow our [LinkedIn](#) page.

Best Regards,

Purchasing Department

EasyDox Pty Ltd.

156, Document Street, Easy Park, Victoria 3900, Australia

W: [EasyDox](#)

M: 0061431366329



Your Tax Invoice CIV-00000722



No Reply

To Nitin Patil

If there are problems with how this message is displayed, click here to view it in a web browser.



Invoice CIV-00000722.pdf
179 KB

Dear Nitin Patil ,

Please find attached your invoice CIV-00000722 for USD 1900 from EasyDox Pty Ltd.

Thank you for your business.

Please check out our new range of products at [Products | Ojas Business Systems](#)

For latest updates on our promotions follow our [LinkedIn](#) page.

Best Regards,



EasyDox

Corporate finance

EasyDox Pty Ltd

156, Document Street, Easy Park
VIC 3900 AUS

Website: [EasyDox](#)

Phone: 123456789

Fax: 987654321



CONFIDENTIALITY / DISCLAIMER NOTICE: The information in this e-mail is confidential and may be legally privileged. It is intended solely for the addressee. If you are not the intended recipient and have received this communication in error, please notify us at CustomerService#@EasyDox.com immediately by return e-mail, delete the e-mail and destroy any copies of it. EasyDox allows reasonable personal use of the e-mail system. Views and opinions expressed in these communications do not necessarily represent those of EasyDox.

-SAVE PAPER - THINK BEFORE YOU PRINT!

This is an automatically generated email – please do not reply.

EasyDox Pty Ltd ABN: 1234123400

INVOICE NO. CIV-00000716



EasyDox

EasyDox Pty Ltd

DUE 23/09/2022

USD4179.53

[Review and pay](#)

Powered by Ojas Business Systems

Dear Paul Fish,
Here's your invoice for your order .

Thank you for your business!

Best Regards,
Accounts

EasyDox Pty Ltd

156, Document Street, Easy Park VIC 3900 AUS

Website: [EasyDox](#)

Phone: 123456789

Fax: 987654321

EasyDox Pty Ltd.

156, Document Street, Easy Park VIC 3900 AUS

123456789

nitin.patil@OjasBusinessSystems.com

ABN 1234123400

If you receive an email that seems fraudulent, please check with the business owner before paying.
Contact us at customerservice@EasyDox.com



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[Privacy](#) | [Security](#) | [Terms of Service](#)

Remittance advice from EasyDox Pty Ltd



No Reply

To Nitin Patil

If there are problems with how this message is displayed, click here to view it in a web browser.



Payment advice 00629 APPM001211.pdf
125 KB



EasyDox

EasyDox Pty Ltd

156, Document Street, Easy Park VIC 3900 AUS

Web: [EasyDox](http://EasyDox.com)

Phone: 123456789

Fax: 987654321

Date: 01/09/2022

Remittance Advice from EasyDox Pty Ltd

Dear Kelly Bryd,

We have processed the payment for your invoices.

Please find attached the payment advice for the same. Please let us know if you have any questions.

Best Regards,

Accounts Department

CONFIDENTIALITY / DISCLAIMER NOTICE: The information in this e-mail is confidential and may be legally privileged. It is intended solely for the addressee. If you are not the intended recipient and have received this communication in error, please notify us at CustomerService#@EasyDox.com immediately by return e-mail, delete the e-mail and destroy any copies of it. EasyDox allows reasonable personal use of the e-mail system. Views and opinions expressed in these communications do not necessarily represent those of EasyDox

SAVE PAPER - THINK BEFORE YOU PRINT!

This is an automatically generated email – please do not reply.

EasyDox Pty Ltd ABN: 1234123400



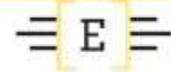
Remittance advice from EasyDox Pty Ltd



No_Reply

To: Nitin Patil

If there are problems with how this message is displayed, click here to view it in a web browser.



EasyDox

EasyDox Pty Ltd

156, Document Street, Easy Park VIC 3900

AUS

Web: [EasyDox](#)

Phone: 123456789

Fax: 987654321

Date: 01/09/2022

Remittance Advice from EasyDox Pty Ltd

Dear Kelly Bryd,

We have processed the payment for your invoices.

Please find attached the payment advice for the same. Please let us know if you have any questions.

Best Regards,

Accounts Department

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SAVE PAPER - THINK BEFORE YOU PRINT!

This is an automatically generated email - please do not reply.

EasyDox Pty Ltd ABN: 1234123400



EasyDox - It's EASY!



EasyDox have paid your invoices on 8/12/2022



No_Reply
To Nitin Patil

If there are problems with how this message is displayed, click here to view it in a web browser.



Dear James Bond,

We are pleased to inform that we have processed payment of **USD 1000** for your invoices. The payment was processed on 8/12/2022.

Please refer attached payment advice file (named as *Payment advice 00629 / APPM001210*) for details of invoices which are paid.

Please let us know if you have any questions. You can mention some of the below internal reference numbers to our team so that they can help you faster!

EasyDox Internal references	
Journal number	00629
Voucher number	APPM001210



EasyDox's head office is now located at:
Suite 2205, Four Towers.
105 City street, Melbourne, Victoria 3000
Please note that warehouse addresses are unchanged.



EasyDox

Corporate finance
EasyDox Pty Ltd

156, Document Street, Easy Park
VIC 3900 AUS

Website: [EasyDox](http://EasyDox.com)
Phone: 123456789
Fax: 987654321



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SAVE PAPER - THINK BEFORE YOU PRINT!

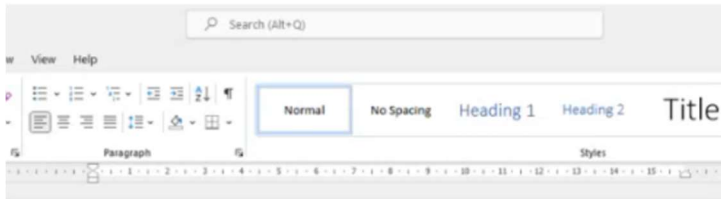
This is an automatically generated email - please do not reply.

EasyDox Pty Ltd ABN: 1234123400

3 How does it work?

At a high level there are 3 steps:

1. Create your email template using MS Word



Dear @Invoice@ ,

Please find attached your account statement @FileName@ as on @ToDate@.

Thank you for your business.




Please check out our new range of products at [Products | Olas Business Systems](#)

Now you can pay your invoices using [secure payment](#) gateway available on our website.

Kindly note that our offices will be closed on Friday, 23rd September 2022 on account of "Friday before the AFL Grand Final". Enjoy the Footy season!

Best Regards,

Accounts Team
EasyDox Pty Ltd.
156, Document Street, Easy Park, Victoria 3900, Australia
W: [EasyDox](#)
M: 0061431366329

2. Upload your Word file into EasyDox Email template and preview your message

Finance and Operations

Edit + New Delete Options

Filter

ED0001	Invoice Template
ED0002	Tax Invoice Local
ED0003	Remittance advices
ED0004	Remittance advices Local

Standard view

EasyDox Email template

Email template Id	Description
ED0001	Invoice Template

Upload file

Upload Cancel

Upload

Cancel

Browser

Upload

Cancel

Finance and Operations

Edit Options

Email message preview

Dear @Invoice@ ,

Please find attached your account statement @FileName@ as on @ToDate@.




Thank you for your business.

Please check out our new range of products at [Products | Ojas Business Systems](#)

Now you can pay your invoices using [secure payment](#) gateway available on our website.

Kindly note that our offices will be closed on Friday, 23rd September 2022 on account of "Friday before the AFL Grand Final". Enjoy the Footy season!!

Best Regards,
 Accounts Team
EasyDox Pty Ltd.
 156, Document Street, Easy Park, Victoria 3900, Australia
 W: [EasyDox](#)
 M: 0061431366329

3. Select your template on your respective report/document

My view ▼ ?

Print destination settings

Print archive

Screen

Printer

File

Email

Save in print archive?
 No

To
 Edit ▼

Cc
 Edit ▼

Email template Id
 ▼

File format
 ▼

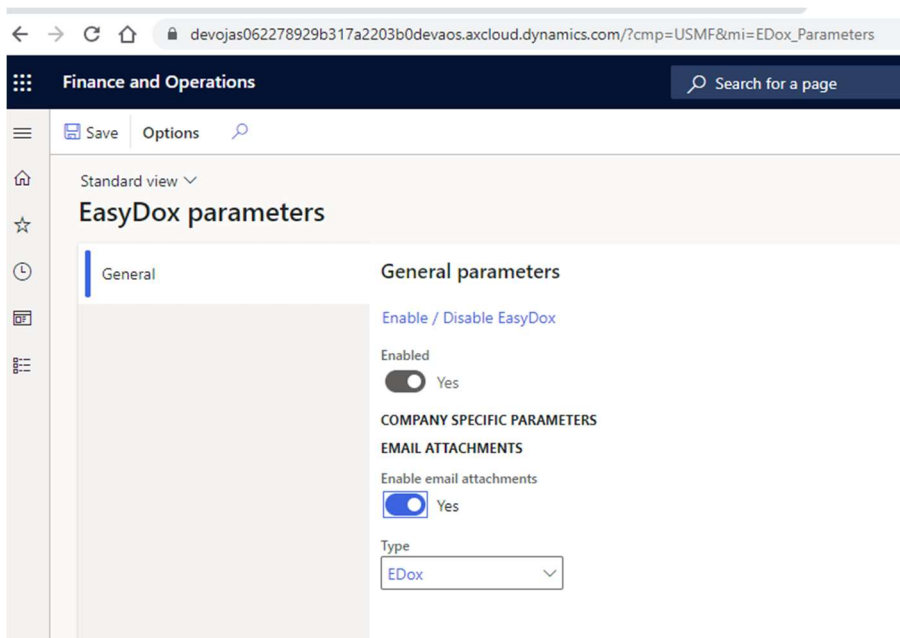
OK Cancel

4 Configuration

4.1 Parameters

The following options:

Option	Purpose
Enable / Disable EasyDox	Enables/Disables EasyDox at a legal entity level
Enable email attachments	If disabled, no extra template attachments will be sent. Only the document/report will be sent.
Type	Only allows document types of this type will be allowed as EasyDox attachments.



4.2 Template

A unique template must be created for every email format you wish to send.

The screenshot displays the 'EasyDox Email template' configuration page in Microsoft Dynamics 365. The interface includes a top navigation bar with 'Finance and Operations' and a search bar. Below the navigation bar, there are tabs for 'Edit', '+ New', 'Delete', and 'Options'. The left sidebar contains a list of templates, with 'AP_SalesConfirmation' (Sales Order Confirmation) selected. The main content area shows the configuration for this template, including a table for 'Email template Id', 'Description', 'Document type', and 'Default language'. Below this, the 'Template settings' section includes 'SEND AS' (Admin) and 'Email' (NO_Reply@OjasBusinessSystem...). The 'Email messages' section at the bottom shows a table with one entry for 'en-us'.

Email template Id	Description	Document type	Default language
AP_SalesCon...	Sales Order Confirmation	Sales order confirmation	en-us

Template settings

SEND AS

Send as
[Admin](#)

Email
[NO_Reply@OjasBusinessSystem...](#)

Email messages

+ New Delete Upload file Email message preview

Language	Subject	Has body
en-us	@CompanyName@ have received your order @SalesOrderHeaderEntit...	✓

4.3 Placeholders

Types of place holders:

1. Global placeholder: Works across any document type.
2. Local placeholders: Can be of two types:
 - a. Entity Based
 - b. Non-Entity Based

You can use any Entity in D365 F&O that is available in the “Data Management>Data Entities> list”.

Formatting required for each placeholder type:

Placeholder Type	Format Required
Entity Based	@ <EntityName>.<PlaceholderName>@
Non-Entity Based	@<PlaceholderName>@

Note: Every place holder must have @ character in the front and at the end.

The screenshot displays the 'EasyDox Placeholders' window in the 'Standard view'. The table below represents the data shown in the interface:

Document type	Placeholder	Description	Is entity
Vendor payment advice	@AmountCredit@	Vendor payment journal line credit amount	
Vendor payment advice	@AmountDebit@	Vendor payment journal line debit amount	
Vendor payment advice	@Currency@	Vendor payment journal line currency	
Vendor payment advice	@FileName@	Vendor Payment advice file name	
Vendor payment advice	@JournalId@	Vendor payment journal number	
Vendor payment advice	@TransDate@	Vendor payment journal line date	
Vendor payment advice	@Voucher@	Vendor payment voucher	
Customer account statement	@CredManCustBalanceStatEntity@	CredManCustBalanceStatEntity	✓
Customer account statement	@CustAccountName@	Customer account name	
Customer account statement	@CustAgingEntity@	CustAgingEntity	✓
Customer account statement	@CustCustomerV3Entity@	CustCustomerV3Entity	✓
Customer account statement	@FileName@	Customer account statement file name	
Customer account statement	@FromDate@	Customer account statement From Date	

4.4 Document Types

A unique Document Type needs to be created for EasyDox as the system will filter for these attachment document types while sending the emails.

