EASYDOX - IT'S *EASY!*

USER MANUAL

Table of Contents

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

NP — Nitin Patil
To: ○ Nitin Patil

2:42 PM

📄 Payment advice.pdf
125 KB

Payment Advice from EasyDox

NP — Nitin Patil
To: ○ Nitin Patil

2:57 PM

📄 Payment advice.pdf
125 KB

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

≡ E ≡
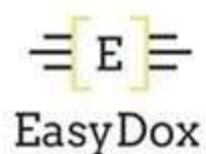
EasyDox

Customer Statement

NP Nitin Patil
To ⊘ Nitin Patil

2:43 PM

📄 Statement.pdf
176 KB

Your customer statement as at 8/31/2022

NP Nitin Patil
To ⊘ Nitin Patil

Fri 12/08

📄 Statement August 2022.pdf ⌄
176 KB

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

≡ E ≡

EasyDox

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.

📄 Show tax invoice.pdf ∨
180 KB
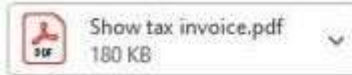
Your invoice from EasyDox

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.

📄 Show tax invoice.pdf ∨
180 KB
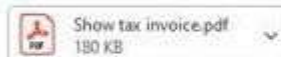
Dear Nitin Patil ,

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: 0061431366529

Your Tax Invoice CIV-00000722

NR 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,

Corporate finance
EasyDox Pty Ltd

156, Document Street, Easy Park
VIC 3900 AUS

Website: EasyDox
Phone: 123456789
Fax: 987654321

EasyDox Pty Ltd ABN: 1234123400

INVOICE NO. CIV-00000716

E

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

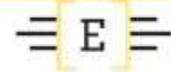# Remittance advice from EasyDox Pty Ltd

ⓘ 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
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

Remittance advice from EasyDox Pty Ltd

ⓘ 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
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

EasyDox - It's EASY!

EasyDox have paid your invoices on 8/12/2022

NR 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 APPM001210.pdf
125 KB

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

We've moved

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.

Corporate finance
EasyDox Pty Ltd

156, Document Street, Easy Park
VIC 3900 AUS

EasyDox

Website: EasyDox
Phone: 123456789
Fax: 987654321

3 How does it work?

At a high level there are 3 steps:

1. Create your email template using MS Word

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

Edit + New Delete Options

Filter

ED0001
Invoice Template

ED0002
Tax Invoice Local

ED0003
Remittance advices

ED0004
Remittance advices Local

ED

Standard view ∨

EasyDox Email template

Email template Id   Description
ED0001   Invoice Template

Email messages

+ New Delete Upload file Email messag

	Language	Subject
○	Language	Subject
○	en-au	Your Invoice @Docume

Upload file

[   ] Browse
Upload   Cancel

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

EasyDox

Linked in

f

3. Select your template on your respective report/document

My view ˅

Print destination settings

Print archive	**Save in print archive?**
Screen	⚪ No
Printer	
File	**To**
Email	[@Home@] Edit ˅

Cc

[   ] Edit ˅

Email template Id

AP_SalesConfirmation ˅

File format

PDF ˅

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.
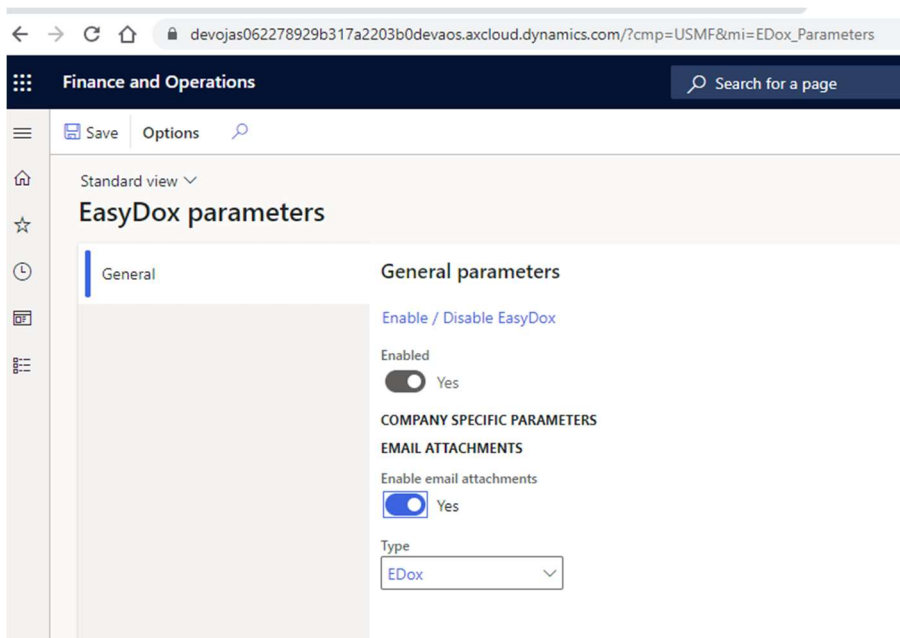
4.2   Template

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

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.

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.