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RELEASE NOTES

eftsure inside Microsoft Dynamics 365 for Finance and Operations Enterprise Edition

EFTSURE INSIDE D365

FIELD EXTENSIONS

WHITE PAPER

This document describes the tools and methods available to further customise records created / updated during electronic onboarding.

eftsure allows the creation of onboarding forms with optional custom sections and fields that your organisation is likely to persist in your database.

This can be achieved either through configuration or development, depending on your requirements.

In most cases, such further extensions can help prevent additional manual and repetitive tasks.
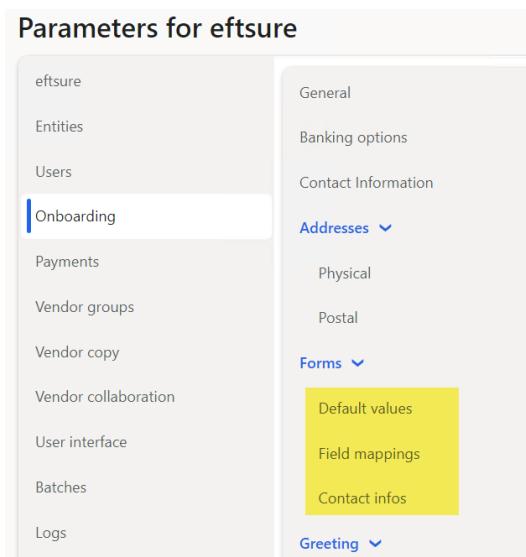
CONFIGURATION

3 different tools are available to help configuring your fields, both available in the Parameters form:

    Default values

    Field mappings

    Contact Infos

Each tool will allow different configuration per onboarding form.

The following fields will not be allowed for these features:

System fields, non visible fields, non editable fields, eftsure reserved fields.

A note section is available at the bottom of the screen to enter any custom user notes, and a copy button is available to copy field mappings and default values to other form.
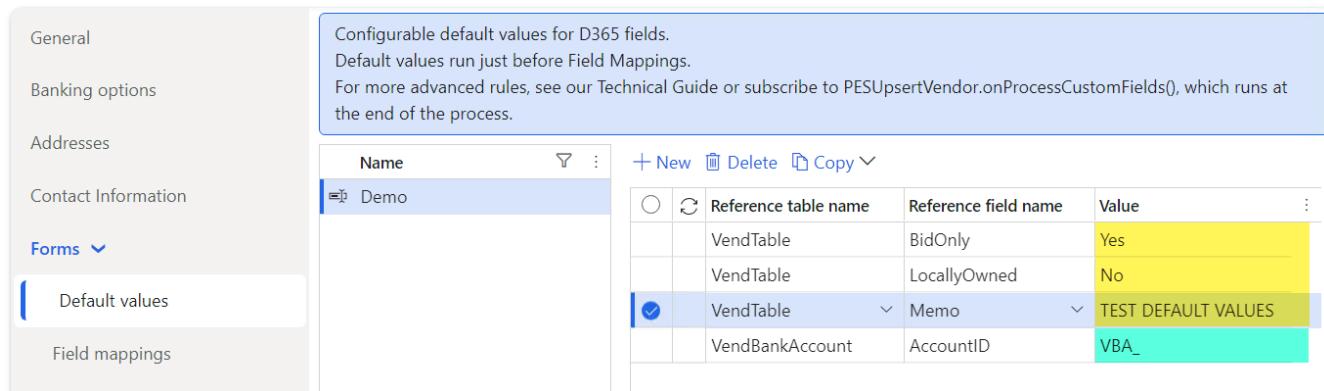
These features have their own related data entities and are therefore exported and imported as part of the configuration.

These features occur during the vendor creation/update process and are designed to run one after another, first default values, then field mappings, then contacts infos, then out of the box field mapping, the a call is made to onProcessCustomFields().

If the same field is used in both default values and field mappings, the latter will win.

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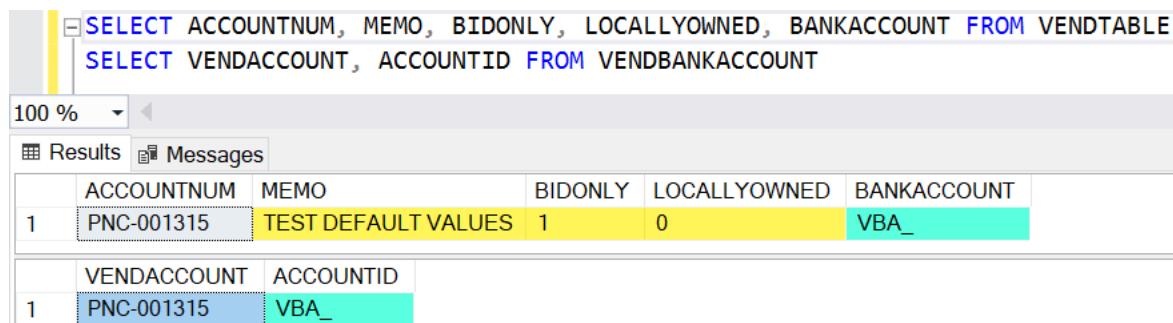## Default values

Default values are like hardcoded values that the administrator can configure to change field values outside of the standard features.

With the above configuration, you can expect the following output from vendor creation.

Field Mappings

Field mappings allow the mapping of onboarding values to additional fields on table.

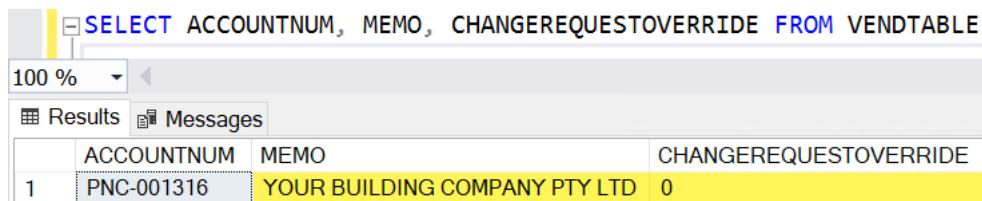**Note:** D365 is not aware of onboarding form design or fields, it uses the list of onboardings to populate the lookups below. Therefore it is recommended to perform an onboarding once the onboarding form design is completed, before configuring the field mappings.
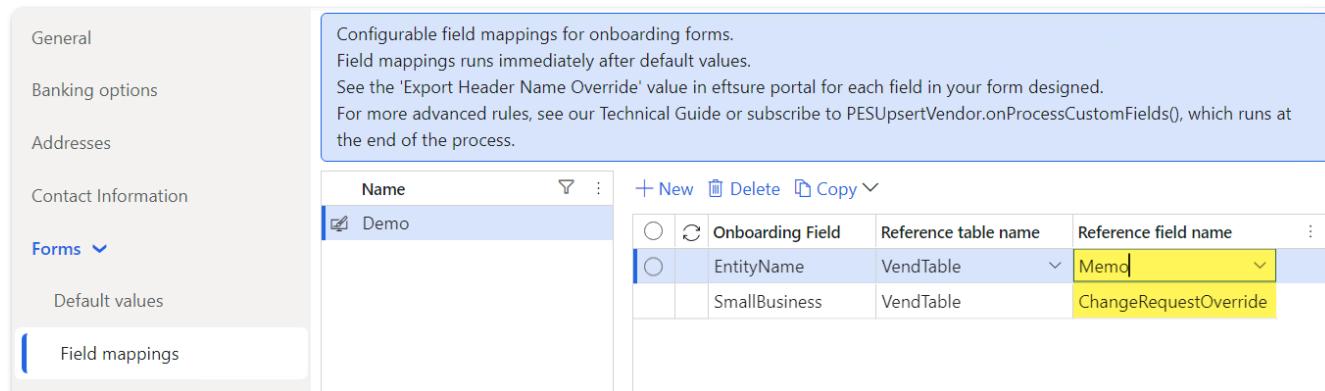
With the above configuration, you can expect the following output from vendor creation.

The Onboarding Field column is a free text column and it's lookup is only populated once onboarding values exist, which shouldn't prevent anyone from configuring. This column relates to the **Export Header Name Override** property on the eftsure onboarding form.

Value testers

For both features, a value tester is available at the bottom of the screen to allow visual validation of the rule:

Example of valid string with related table (vendor account):
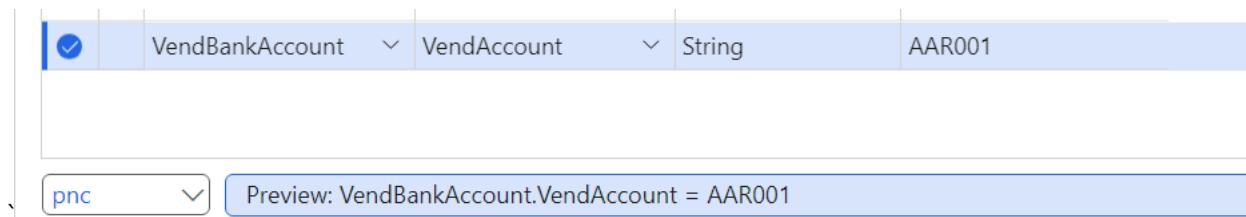
Example of invalid string with related table (vendor account):

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| ✓ | VendBankAccount ∨ | VendAccount ∨ | String | AAR00 |

pnc ∨   Preview: Unable to set default value AAR00 to VendBankAccount.VendAccount

Example of valid enum (Blocked: No):

| ✓ | VendTable ∨ | Blocked ∨ | Enum | No |

Preview: VendTable.Blocked = No

Valid values: No, Invoice, All, Payment, Requisition, Never, PurchOrder

Example of invalid enum (Blocked: None):

| ○ | VendTable ∨ | Blocked ∨ | Enum | None |

Preview: Unable to set default value None to VendTable.Blocked

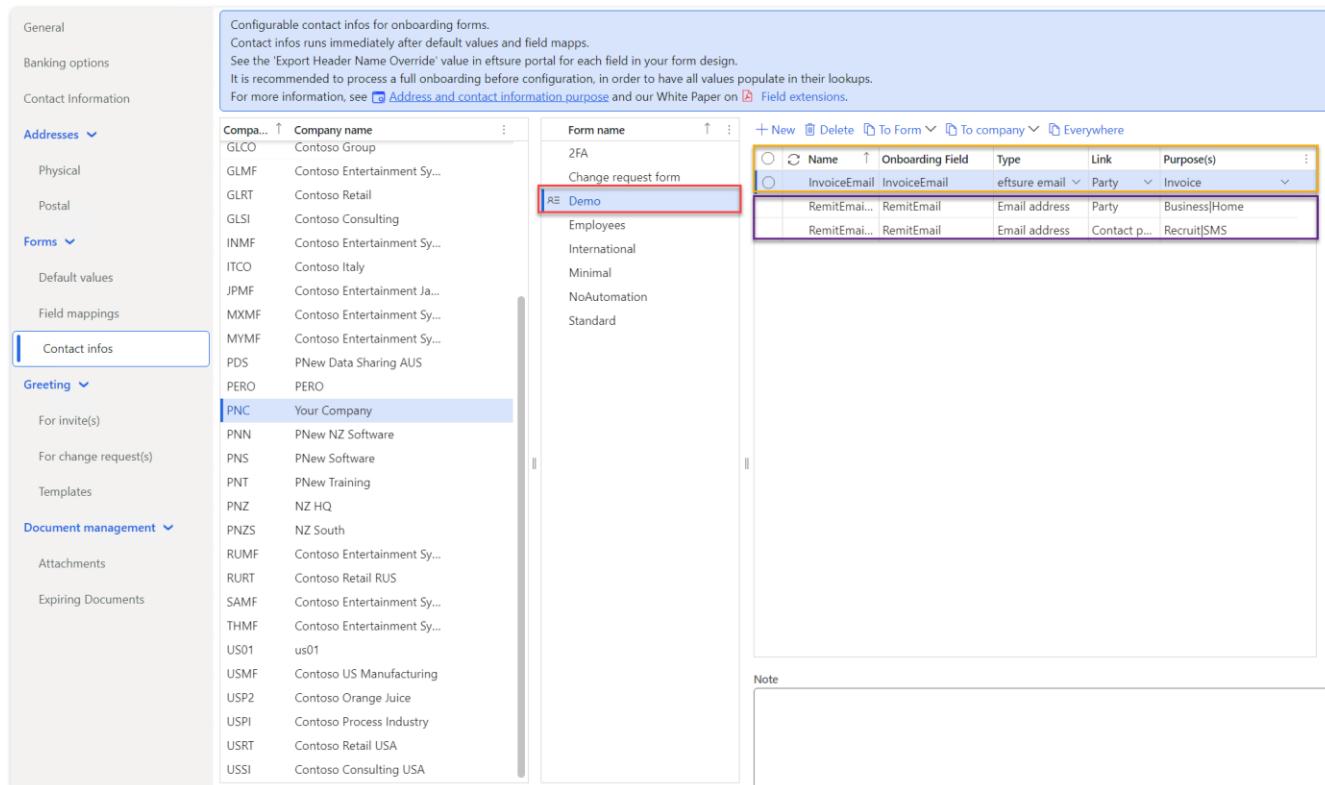Valid values: No, Invoice, All, Payment, Requisition, Never, PurchOrder

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Contact Infos

Contact infos allow the creation of additional contact details based on onboarding values.

You can configure new contact details:

at the Vendor (Party) or Contact person level

with different purposes or roles

with different contact types (Email, Phone, …)

Note: D365 is not aware of onboarding form design or fields, it uses the list of onboardings to populate the lookups below. Therefore it is recommended to perform an onboarding once the onboarding form design is completed, before configuring the field mappings.

With the above configuration, and the following onboarding form values:

You can expect the following additions to standard vendor creation:

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And the following addition to contact creation:

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EXTENSIONS

Additionally, code extensions are available during several events raised by our solution.

The delegate **PESUpsertVendor.onProcessCustomFields()** is used to futher extend the out of the box solution, especially when complex rules and logic are required.

```
delegate void onProcessCustomFields(PESOnboardingInfo infos, VendTable v, VendBankAccount vba)
{
}
```

In this example, we'll create a new class called **MyCustomCode**:

```
class MyCustomCode
{
    [SubscribesTo(classStr(PESUpsertVendor), delegateStr(PESUpsertVendor, onProcessCustomFields))]
    public static void PESUpsertVendor_onProcessCustomFields(PESOnboardingInfo infos, VendTable v, VendBankAccount vba)
    {
        v.MyCustomField1 = infos.getValue("1500");      //Hardcoded custom field value
        v.update();

        vba.MyCustomField1 = infos.getValue("1501");    //Hardcoded custom field value
        vba.update();
    }
}
```

Alternatively, you can also request field values by name when using '**Export Header Name Override**'.

    Infos.getValueByName('File1');

    Infos.getExpiryByName('File1');

This method subscribes to the delegate and runs each time a vendor is updated, allowing each customer or partner to further extend this solution.

Custom fields

Custom sections and custom fields on onboarding and verification forms are downloaded from eftsure during the 'Get onboarding information' step and are available for developers to interact with.

The custom fields, along with standard onboarding fields are stored in table **PESONBOARDINGFIELD**.

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The standard onboarding fields are all prefix with an underscore. All the fields are displayed in the onboarding values form in order to validate onboarding and verifications. In the following screen, standard fields are highlighted in green and custom fields are highlighted in red.

Note: Upload or attachments fields are automatically attached to both the onboarding record and the vendor record.

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Export Header Name Override

If you wish to use naming conventions for your fields, in order to keep consistency across environments, you'll need to set a '**Export Header Name Override**' in the field properties in the eftsure portal. Then the field name will become the value from 'Export Header Name Override', instead of field text. In the following example, our **File Upload field Contract** has been named **File1**, and therefore will be retrieved later on as 'File1', instead of an integer field Id that is different from one environment to the other.

Code sample

```
    [SubscribesTo(classStr(PESUpsertVendor), delegateStr(PESUpsertVendor,
onProcessCustomFields))]
    public static void PESUpsertVendor_onProcessCustomFields(PESOnboardingInfo infos,
VendTable v, VendBankAccount vba)
    {
        v.PaymTermId = v.VendGroup == 'EMPL' ? 'D10' :
Infos.getValueByName('PaymentTerms');

        v.YourAccountNum = 'YOUR_NAME';
        v.PaymId = 'YOUR_ID';
        v.update();
    }
```

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DELEGATES

This module offers several integration points available in the form of delegate methods which are invoked as part of our workflow. Any developer can subscribe to delegates from our publisher classes to extend the features of this module. For more information about delegates in Microsoft Dynamics 365 FO, please refer to https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/extensibility/extensible-code-delegates.

List of available delegates

Several publisher classes are available during the eftsure workflow to allow non-intrusive customisations by extensions, without over-layering:

Delegate method	Description
PESGetOnboardingInfo	
onInfoUpdate	Invoked once for each onboarding and verification upserted in the system when downloading supplier information from eftsure.
onDocumentBeforeInsert	Extension point to be used for before an attachment is created, amongst others, to set expiration date matching document
onDocumentAfterInsert	Extension point to be used for after an onboarding attachment is created, amongst others, to set expiration date matching document
PESInvite	
onReplacePlaceholders	Invoked when replacing placeholders on the invitation text to support custom placeholders.
PESLimitPayment	
onPaymentLimitUpdated	Invoked once each time a vendor bank account's payment limit is updated into eftsure.
PESSelfCertify	
onSelfCertified	Invoked once each time a vendor bank account's self-certification status is updated into eftsure.
PESUpdate	
onVendBankAccountUpdated	Invoked each time eftsure acknowledged a bank account update.
onVerificationInfoUpserted	Invoked each time eftsure a bank account verification information is received from eftsure
PESGetSupplierInfo	
onVendTableUpdated	Invoked each time a vendor is modified
onVendBankAccountUpdated	Invoked each time a bank account is modified
onPESVendTableUpdated	Invoked each time a vendor is modified

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onFailedToFindBankAccount	Invoked if the eftsure supplier can't be found in the system, allows the customer to have their own mapping rule for eftsure's supplier code. This delegate is mostly used for projects where eftsure was connected to a legacy system prior to D365FO.
PESUpsertVendor	
onVendTableUpserted	Invoked each time a vendor is modified
onVendBankAccountUpserted	Invoked each time a bank account is modified
onUserUpserted	Invoke each time a user is upserted for vendor collaboration
onProcessCustomFields	Invoked at the end of processing onboarding and verification information, but before committing the changes in the database. This is the recommended place to use your custom fields and store them into the database.
PESVerify	
onLedgerJournalTransUpdated	Invoked during payment journal validation, once the eftsure verification values have been updated on the transaction line.
onVendBankAccountsUpdated	Invoked during payment journal validation, once the eftsure verification values have been updated on the bank account.
onVendTableUpdated	Invoked during payment journal validation, once the eftsure verification values have been updated on the vendor.
onPESVendTableUpdated	Invoked during payment journal validation, once the eftsure verification values have been updated on the vendor.
PESHtmlScreenshotControl	
onScreenshotCompleted	Method called once the screenshot has completed, but before the screenshot contents have been uploaded to the server in async manner After this event, the UI can be changed while the screenshot contents are being uploaded to the server.
onScreenshotUploaded	Method called after successful upload of the screenshot, screenshot can be used for any purpose

See appendix Delegates declaration for full event handlers declaration.

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