WHITE PAPER

Filter feature

Eftsure inside Microsoft Dynamics 365 for F&O

eftsure

Introduction

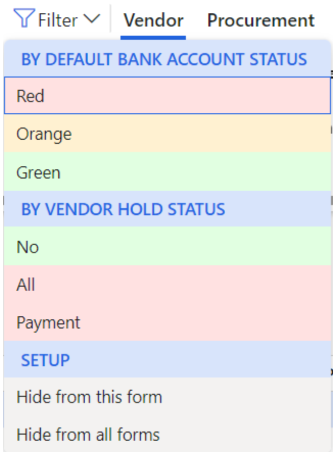
This document will highlight new filter function which is available in all applicable eftsure D365 forms.

Key feature allow filtering vendor or vendor bank account by eftsure verification status or D365 on-hold status.

Access

By default, Filter feature is available next to eftsure menu in all applicable forms.

Filter feature includes all eftsure verification status as well as On-hold status.



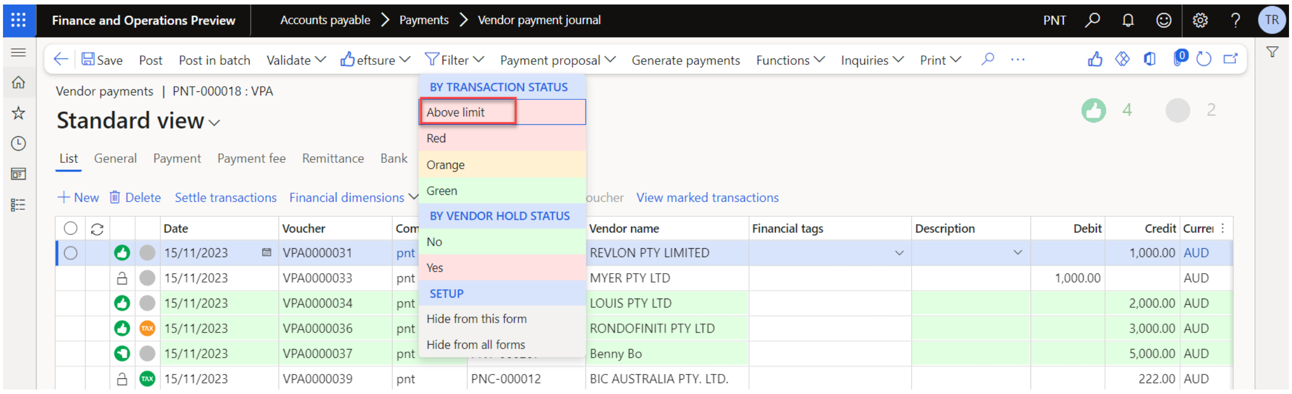
Vendor and Vendor bank account statuses are described as below.

Status	Icon	Description	Recommendation
Self-certified		Bank account has been self-certified by our users	
Cross-matched		Bank account has been matched with an existing vendor	
Verified		Bank account has been verified by eftsure	
Not verified yet		Waiting on eftsure verification	Perform onboarding/change request/verification
New supplier		Newly created vendor in eftsure	Perform onboarding/change request/verification
Account name differs		Vendor has reported incorrect name	Self-certify or Alter name to match eftsure record
Incorrect details		Vendor has reported incorrect details	Do not pay this bank account
Cash / Cheque / BPAY / Other		Vendor not paying through electronic means	
None		Vendor has never been sent to eftsure	Perform onboarding/change request/verification
Blocked		Vendor is blocked	Remove vendor hold (if appropriate)
Expired		Bank account is expired or deleted	Do not pay this bank account
Excluded from eftsure		Vendor excluded from eftsure	Include in eftsure (if appropriate)

Functions

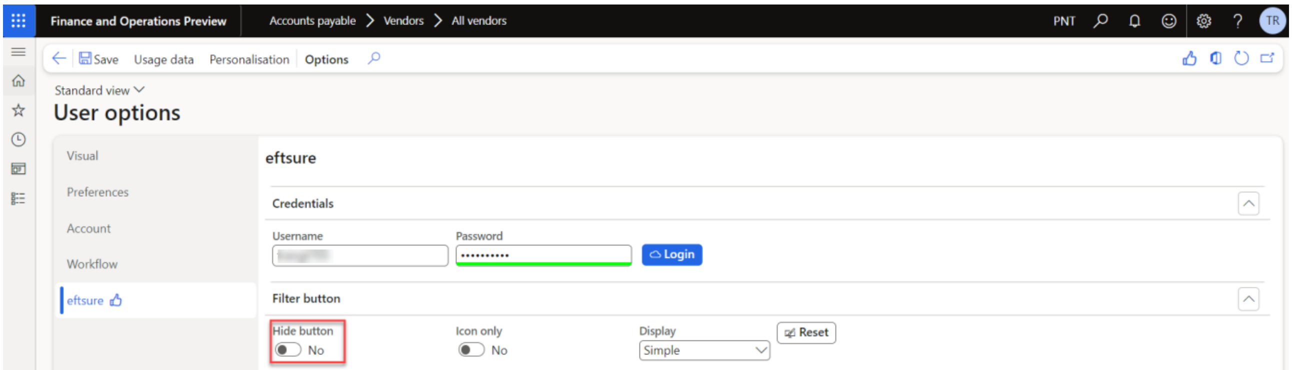
Filter function will appear in all applicable D365 eftsure forms and not limited to eftsure workspace, All Vendor, Exflow Import form All.

For Vendor payment journal, there’s additional filter relating to payment lines not by vendor bank account.



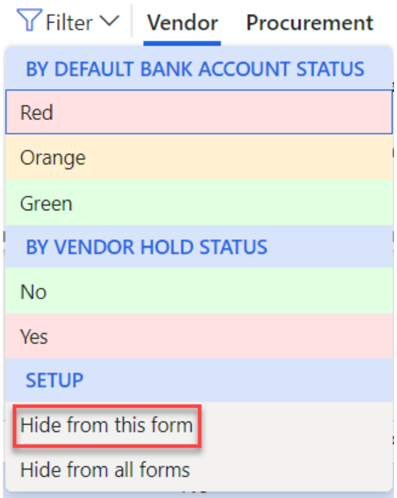
Configuration

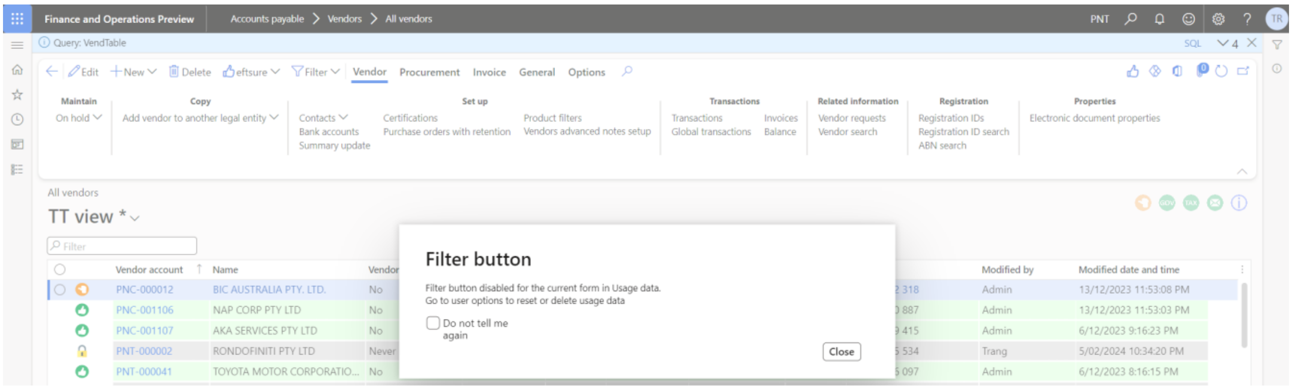
By default, Filter function is enabled for all users. Each user will have an option to enable or disable the function in 1 or all D365 applicable forms.



User has option to disable (hide the filter).

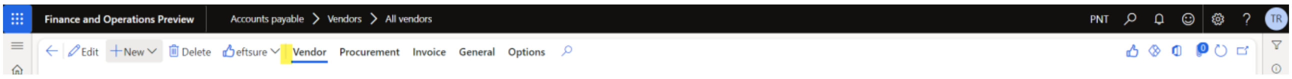
Hide from single form





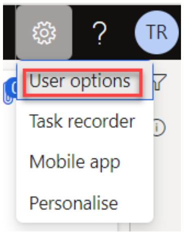
Filter feature will disappear from the current form.

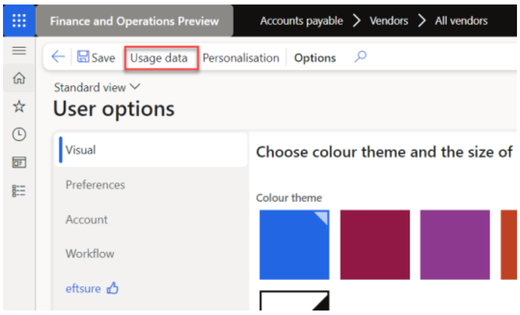
To enable the function user will have 2 options.



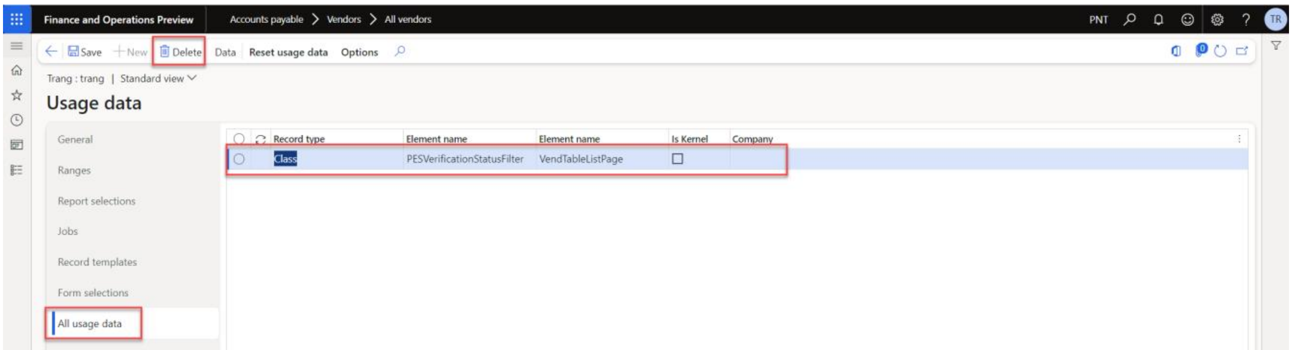
1. Clear usage data

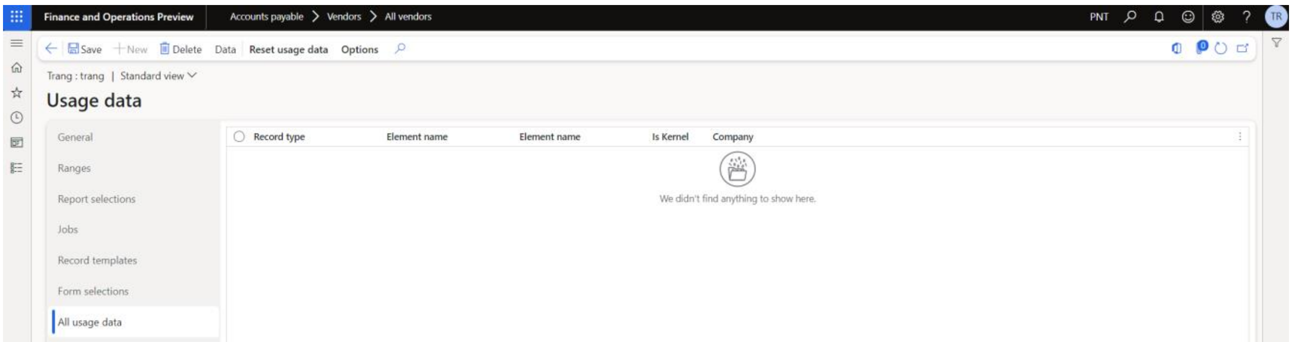
Select User options > Usage data



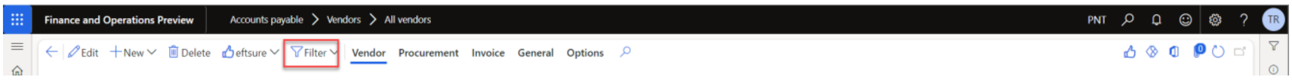


User can either Delete the usage history or Reset usage data to clear the personalised record.



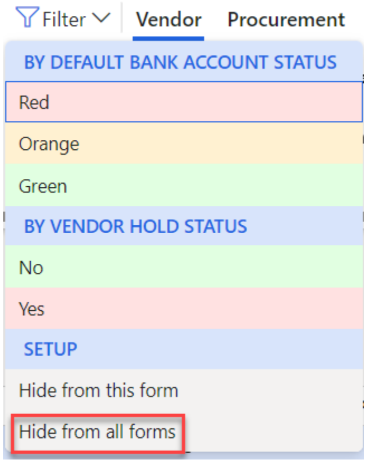


Filter option will re-appear.

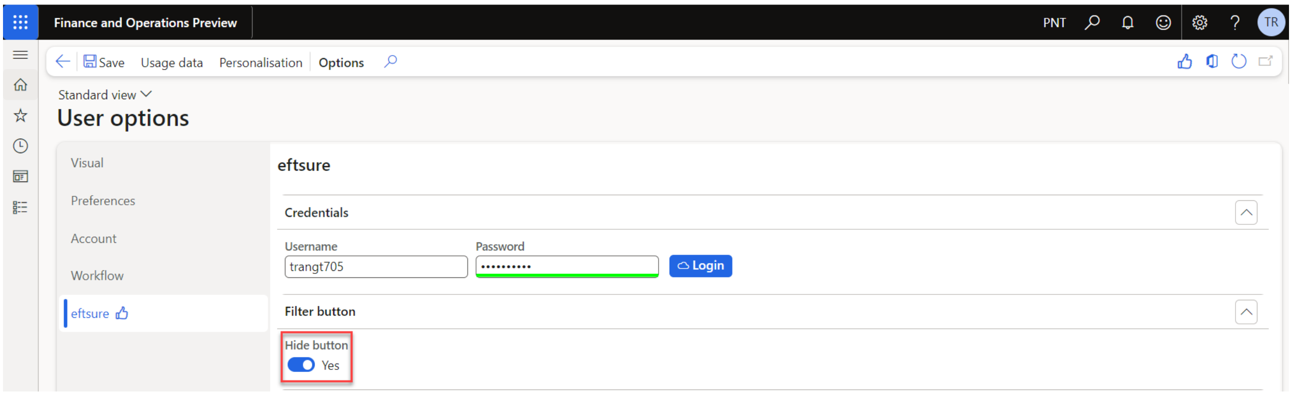


2. Reset Filter button

Example below is used to Hide from all forms.

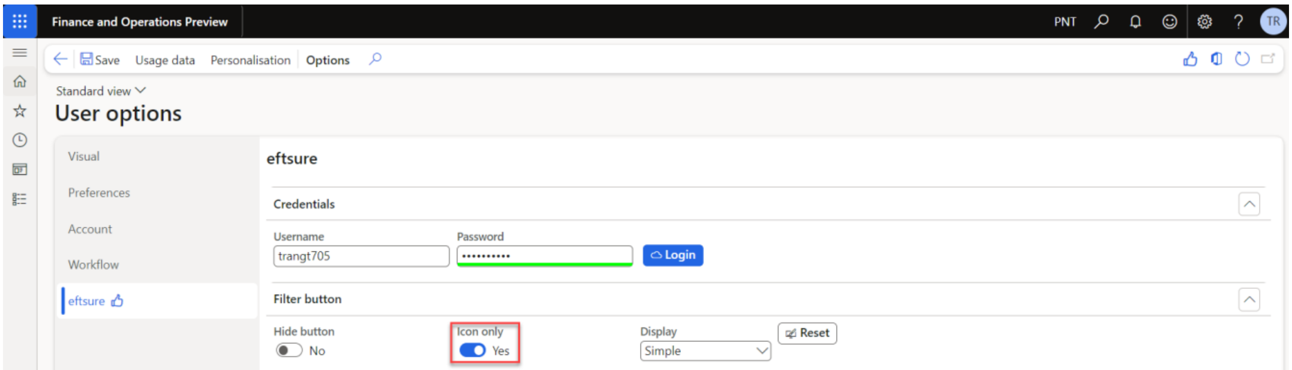


Hide action will disable filter feature in all D365 forms.

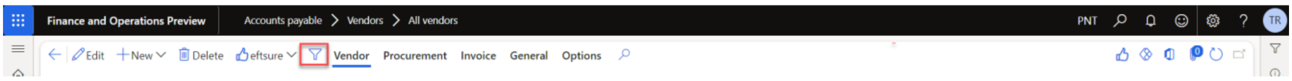


To re-enable the function, user can reset and change the Hide button to No.

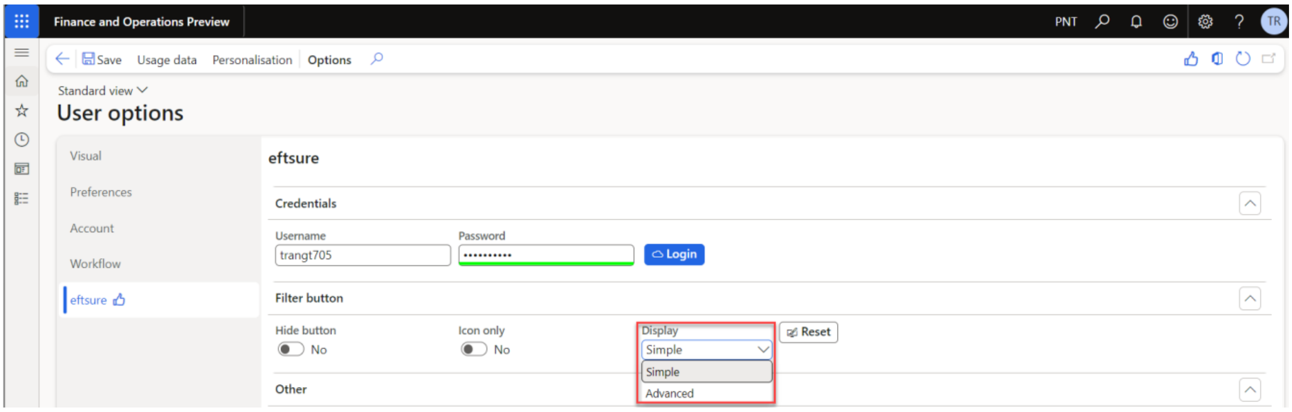
User also has an option to customize filter feature appearance.



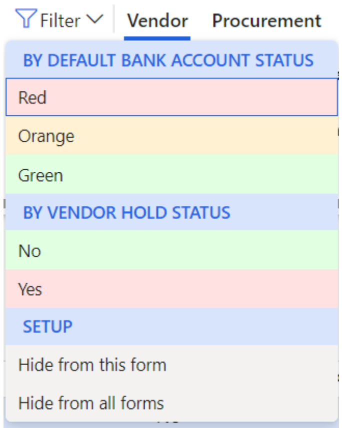
Icon only will hide Filter word and only leaving the Filter icon.



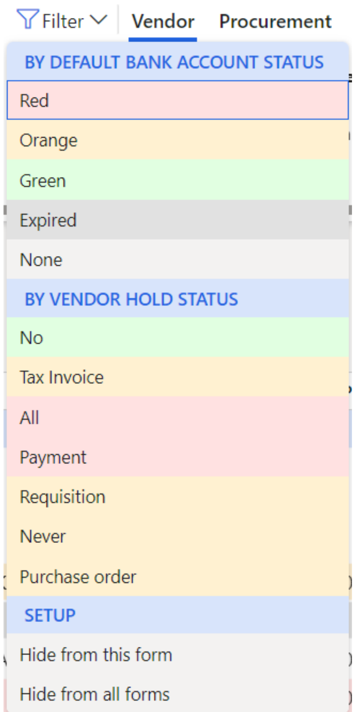
Display options



Simple filter option will limit the menu options to only high level.



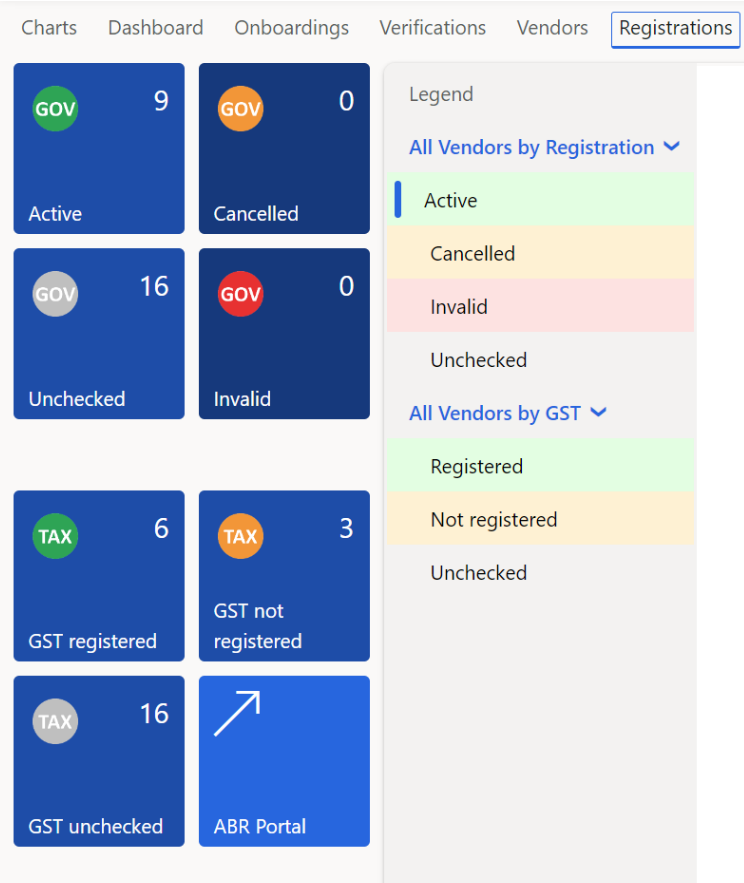
Additional options will be available for Advanced display.



Filter by Vendor Government Code status

In order to keep this new menu small and simple, filtering by Gov code status is not available in this menu. To filter vendors by Gov Code status, you should use either:

Eftsure “Know Your Payee” > Registrations > All Vendors by registration



Standard filtering features on any vendor list form, for example by using Advanced filter or sort native features.