



RELEASE NOTES

**eftsure inside Microsoft
Dynamics 365 for
Finance and Operations
Enterprise Edition**

EFTSURE INSIDE D365

ODATA REFERENCE

WHITE PAPER

This document describes all entity related information for eftsure inside D365 F&O.

Please see the following links for more information on how to use entities and connect third party utilities for development.

[Open Data Protocol \(OData\) - Finance & Operations | Dynamics 365 | Microsoft Learn](#)

[Test services by using third-party utilities - Finance & Operations | Dynamics 365 | Microsoft Learn](#)

ENTITIES

This extension is shipped with several data entities in order help accessing eftsure data outside of Dynamics. The below artifacts are available to be consumed by any OData client, including LogicApps, Flow, Postman, ...

At the time of writing, the following entities are available:

Entities				
Type	Name	Readonly	Public	Description
Actions	PES			Entity used for OData actions (Invite, Check...)
Main	PESVendTableEntity			Vendor properties (eftsure, ABN details, ...)
Main	PESVendBankAccountEntity			Bank accounts (status, self cert ...)
Main	PESOnboardingInfoEntity			Onboardings
Main	PESOnboardingFieldEntity			Onboarding details, fields, sections
Main	PESVendorHistoryLogEntity			Vendor history logs by date, status
Parameters	PESParametersEntity			Main configuration entity
Parameters	PESParametersPerCompanyEntity			Configuration entity
Parameters	PESExtendIconRowOnFormEntity			Configuration entity
Parameters	PESExtendLookupOnFormEntity			Configuration entity
Parameters	PESOnboardingFormFieldMappingsEntity			Configuration entity
Parameters	PESOnboardingTextEntity			Configuration entity
Parameters	PESVendorGroupConfigurationEntity			Configuration entity
Project	PESProjMilestoneMarkerEntity			Projects entity
Project	PESProjVerticalMarkerEntity			Projects entity
Project	PESProjLinkEntity			Projects entity
Project	PESProjEntity			Main projects entity
Project	PESProjActivityEntity			Projects entity
Project	PESProjAttachmentsEntity			Projects entity

Note: New entities are added regularly, refer to D365 metadata for the latest.

For more details about each specific entity, staging table, mappings, please refer to the Data Management Framework > Entities form:

Entity	Staging table	Target entity	Entity type	Change tracking	Type	Set
Custom mappings	PESOnboardingFormField...	PESOnboardingFormFieldMappingsEntity	Entity	None	PESOnboardingFormField...	☐
eftsure bank account information	PESVendBankAccountSta...	PESVendBankAccountEntity	Entity	None	PESVendBankAccountEntity	☐
eftsure Projects activities	PESProjActivityStaging	PESProjActivityEntity	Entity	None	PESProjActivityEntity	☐
eftsure Projects activities attachments	PESProjActivityAttachmen...	PESProjActivityAttachmentsEntity	Entity	None	PESProjActivityAttachmen...	☐
eftsure Projects links	PESProjLinkStaging	PESProjLinkEntity	Entity	None	PESProjLinkEntity	☐
eftsure Projects markers	PESProjMilestoneMarkerS...	PESProjMilestoneMarkerEntity	Entity	None	PESProjMilestoneMarkerE...	☐
eftsure Projects projects	PESProjStaging	PESProjEntity	Entity	None	PESProjEntity	☐
eftsure Projects projects attachments	PESProjAttachmentsEntity...	PESProjAttachmentsEntity	Entity	None	PESProjAttachmentsEntity	☐
eftsure Projects vertical markers	PESProjVerticalMarkerSta...	PESProjVerticalMarkerEntity	Entity	None	PESProjVerticalMarkerEntity	☐
Icons	PESExtendIconRowOnFor...	PESExtendIconRowOnFormEntity	Entity	None	PESExtendIconRowOnFor...	☐
Lookups	PESExtendLookupOnForm...	PESExtendLookupOnFormEntity	Entity	None	PESExtendLookupOnForm...	☐
Onboarding text templates	PESOnboardingTextStaging	PESOnboardingTextEntity	Entity	None	PESOnboardingTextEntity	☐
Parameters	PESParametersStaging	PESParametersEntity	Entity	None	PESParametersEntity	☐
PESParametersPerCompany	PESParametersPerCompa...	PESParametersPerCompanyEntity	Entity	None	PESParametersPerCompa...	☐
Vendor group(s) configuration	PESVendorGroupConfigur...	PESVendorGroupConfigurationEntity	Entity	None	PESVendorGroupConfigur...	☐
Vendor History	PESVendorHistoryLogStag...	PESVendorHistoryLogEntity	Entity	None	PESVendorHistoryLogEntity	☐

Alternatively, go to eftsure Workspace > Parameters > Data entities:

Parameters for eftsure "Know Your Payee"

This section list all data entities associated with this module.
For more information, please check our White Paper on Data entities

Delete Mapping Refresh entity list Data import/export framework parameters Empty all staging tables

Entity category	Entity	Staging table	Target entity	Entity type	Change tracking	Configuration key
Parameters	eftsure copy to another entity - default values	PESDefaultValuesCopyToAnotherEntityStaging	PESDefaultValuesCopyToAnotherEntityEntity	Entity	None	PES
Parameters	eftsure copy to another entity - fields	PESFieldsCopyToAnotherEntityStaging	PESFieldsCopyToAnotherEntityEntity	Entity	None	PES
Parameters	eftsure onboarding field custom mappings	PESOnboardingFormFieldMappingsStaging	PESOnboardingFormFieldMappingsEntity	Entity	None	PES
Parameters	eftsure onboarding field default values	PESOnboardingFormDefaultValuesStaging	PESOnboardingFormDefaultValuesEntity	Entity	None	PES
Parameters	eftsure onboarding text snippets	PESOnboardingTextStaging	PESOnboardingTextEntity	Entity	None	PES
Parameters	eftsure parameters	PESParametersStaging	PESParametersEntity	Entity	None	PES
Parameters	eftsure parameters per company	PESParametersPerCompanyStaging	PESParametersPerCompanyEntity	Entity	None	PES
Parameters	eftsure payment methods per currencies	PESPaymentMethodPerCurrencyStaging	PESPaymentMethodPerCurrencyEntity	Entity	None	PES
Parameters	eftsure test scripts	PESTestScriptsStaging	PESTestScriptsEntity	Entity	None	PES
Parameters	eftsure user information	PESUserInfoStaging	PESUserInfoEntity	Entity	None	PES
Parameters	eftsure user interface extensions - Icon rows	PESExtendIconRowOnFormStaging	PESExtendIconRowOnFormEntity	Entity	None	PES
Parameters	eftsure user interface extensions - Lookup	PESExtendLookupOnFormStaging	PESExtendLookupOnFormEntity	Entity	None	PES
Parameters	eftsure vendor collaboration email templates	PESVendorCollaborationEmailTextStaging	PESVendorCollaborationEmailTextEntity	Entity	None	PES
Parameters	eftsure vendor group configuration	PESVendorGroupConfigurationStaging	PESVendorGroupConfigurationEntity	Entity	None	PES
Parameters	eftsure verified payment methods	PESVendPaymModeTableStaging	PESVendPaymModeTableEntity	Entity	None	PES
Document	eftsure projects activities attachments	PESProjActivityAttachmentsEntityStaging	PESProjActivityAttachmentsEntity	Entity	None	PES
Document	eftsure projects projects attachments	PESProjAttachmentsEntityStaging	PESProjAttachmentsEntity	Entity	None	PES
Document	eftsure test scripts attachments	PESTestScriptsAttachmentsEntityStaging	PESTestScriptsAttachmentsEntity	Entity	None	PES
Master	eftsure projects activities	PESProjActivityStaging	PESProjActivityEntity	Entity	None	PES
Master	eftsure projects links	PESProjLinkStaging	PESProjLinkEntity	Entity	None	PES
Master	eftsure projects markers	PESProjMilestoneMarkerStaging	PESProjMilestoneMarkerEntity	Entity	None	PES
Master	eftsure projects projects	PESProjStaging	PESProjEntity	Entity	None	PES
Master	eftsure projects styles	PESProjStyleStaging	PESProjStyleEntity	Entity	None	PES
Master	eftsure projects vertical markers	PESProjVerticalMarkerStaging	PESProjVerticalMarkerEntity	Entity	None	PES

Configuration

This subset of entities is used internally to import export configuration to file/cloud, across environments for any project purposes.

Archiving configuration locally or to the cloud for later availability is recommended after each config change.

Note: Eftsure credentials and connection details are not persisted as part of these entities into order to avoid confusion and invalid passwords after imports.

Project

This subset of entities is used internally to import export projects to file/cloud, across environments for any project purposes.

Archiving projects locally or to the cloud for later availability is recommended after each project change.

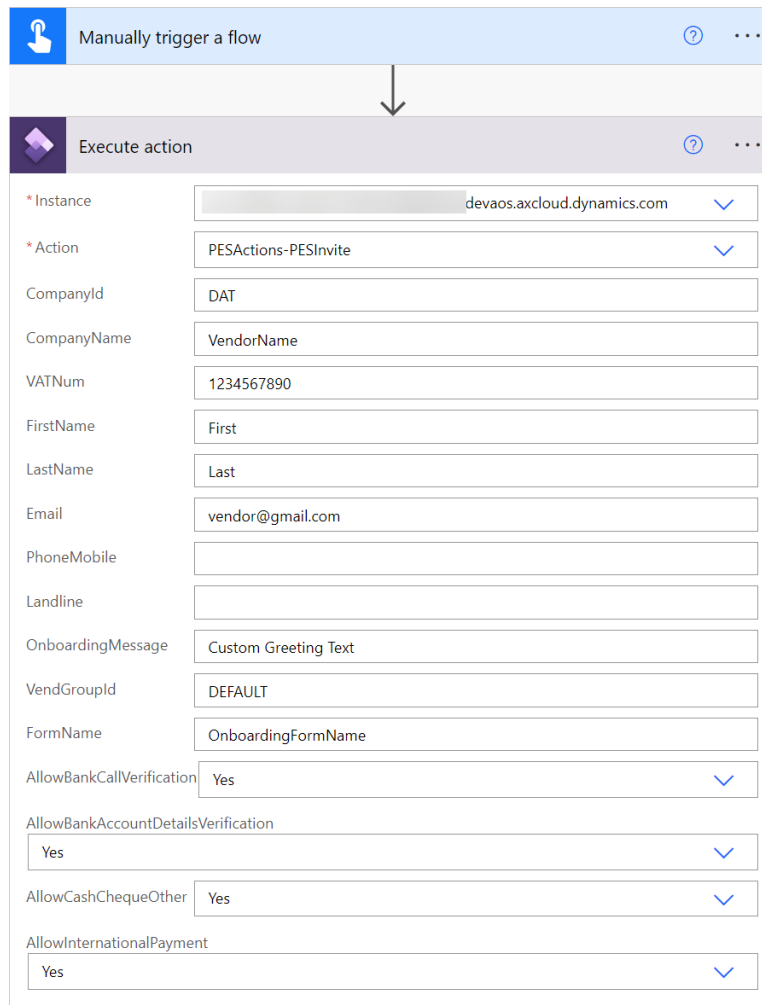
Main

These entities have been designed to help customers extract eftsure data from Dynamics. All custom fields from vendors, bank accounts, onboardings are available for external use, but these entities are readonly and should only be updated from eftsure cloud.

Actions

External actions can also be triggered into eftsure inside Dynamics 365. Currently, the following actions are available:

Sending an invitation.



The screenshot displays the Dynamics 365 user interface. At the top, a blue header bar contains a hand icon and the text 'Manually trigger a flow'. Below this, a grey bar shows 'Execute action' with a question mark icon and a dropdown menu. A black arrow points from the 'Manually trigger a flow' bar to the 'Execute action' bar. The main form area contains the following fields:

* Instance	devaos.axcloud.dynamics.com	▼
* Action	PESActions-PESInvite	▼
CompanyId	DAT	
CompanyName	VendorName	
VATNum	1234567890	
FirstName	First	
LastName	Last	
Email	vendor@gmail.com	
PhoneMobile		
Landline		
OnboardingMessage	Custom Greeting Text	
VendGroupId	DEFAULT	
FormName	OnboardingFormName	
AllowBankCallVerification	Yes	▼
AllowBankAccountDetailsVerification	Yes	▼
AllowCashChequeOther	Yes	▼
AllowInternationalPayment	Yes	▼

Performing an instant vendor check

The image shows a two-part configuration interface. The top part, titled "Manually trigger a flow", contains three input pairs: "Name" and "Bank account name", "Code" and "Bank account code", and "Number" and "Bank account number". Below these is a "+ Add an input" button. An arrow points down to the bottom part, titled "Execute action". This panel includes a dropdown for "Instance" (set to "devaos.axcloud.dynamics.com"), a dropdown for "Action" (set to "PESActions-PESCheck"), and three input fields: "AccountName" (mapped to "Name"), "AccountCode" (mapped to "Code"), and "AccountNumber" (mapped to "Number"). Each mapped field has a small icon and a close button (x).

Alternatively, calling PESActions from Postman looks like the following, assuming authentication is already handled.

POST

{{resource}}/data/PESAActions/Microsoft.Dynamics.DataEntities.PESSendBankAccountVerification

Params

Authorization

Headers (11)

Body

Scripts

Settings

none

form-data

x-www-form-urlencoded

raw

binary

GraphQL

JSON

```

1  {
2    "DataAreaId": " ",
3    "VendAccount": "V000025",
4    "BankAccountId": "Bank1",
5    "Email": " ",
6    "FirstName": "John",
7    "LastName": "Smith",
8    "MobilePhone": "( ",
9    "Landline": " ",
10   "PhoneNumberSource": "ERP",
11   "PhoneNumberAuthorisation": "No",
12   "InvoiceNumber": " ",
13   "InvoiceDate": "1900-01-01T12:00:00Z",
14   "InvoiceAmount": 0
15 }

```

Body

Cookies (2)

Headers (15)

Test Results

🔍

{ } JSON

Preview

Visualize

```

1  {
2    "@odata.context": "https://.operations.dynamics.com/data/$metadata#Edm.String",
3    "value": "{ \"message\": \"Legal entity not found\", \"result\": false }"
4  }

```

Permissions

The entities described in this document are controlled via standard security privileges

Entities		Security	
Type	Name	View	Edit
Actions	PES		PESAdmin / PESConfigure
Main	PESVendTableEntity	PESDataEntityView	
Main	PESVendBankAccountEntity	PESDataEntityView	
Main	PESOnboardingInfoEntity	PESDataEntityView	
Main	PESOnboardingFieldEntity	PESDataEntityView	
Main	PESVendorHistoryLogEntity	PESVendorHistoryLogEntityView	PESVendorHistoryLogEntityMaintain
Parameters	PESParametersEntity	PESParametersEntityView	PESParametersEntityMaintain
Parameters	PESParametersPerCompanyEntity	PESParametersEntityView	PESParametersEntityMaintain
Parameters	PESExtendIconRowOnFormEntity	PESParametersEntityView	PESParametersEntityMaintain
Parameters	PESExtendLookupOnFormEntity	PESParametersEntityView	PESParametersEntityMaintain
Parameters	PESOnboardingFormFieldMappingsEntity	PESParametersEntityView	PESParametersEntityMaintain
Parameters	PESOnboardingTextEntity	PESParametersEntityView	PESParametersEntityMaintain
Parameters	PESVendorGroupConfigurationEntity	PESParametersEntityView	PESParametersEntityMaintain
Project	PESProjMilestoneMarkerEntity	PESProjEntityView	PESProjEntityMaintain
Project	PESProjVerticalMarkerEntity	PESProjEntityView	PESProjEntityMaintain
Project	PESProjLinkEntity	PESProjEntityView	PESProjEntityMaintain
Project	PESProjEntity	PESProjEntityView	PESProjEntityMaintain
Project	PESProjActivityEntity	PESProjEntityView	PESProjEntityMaintain
Project	PESProjAttachmentsEntity	PESProjEntityView	PESProjEntityMaintain
Project	PESProjActivityAttachmentsEntity	PESProjEntityView	PESProjEntityMaintain

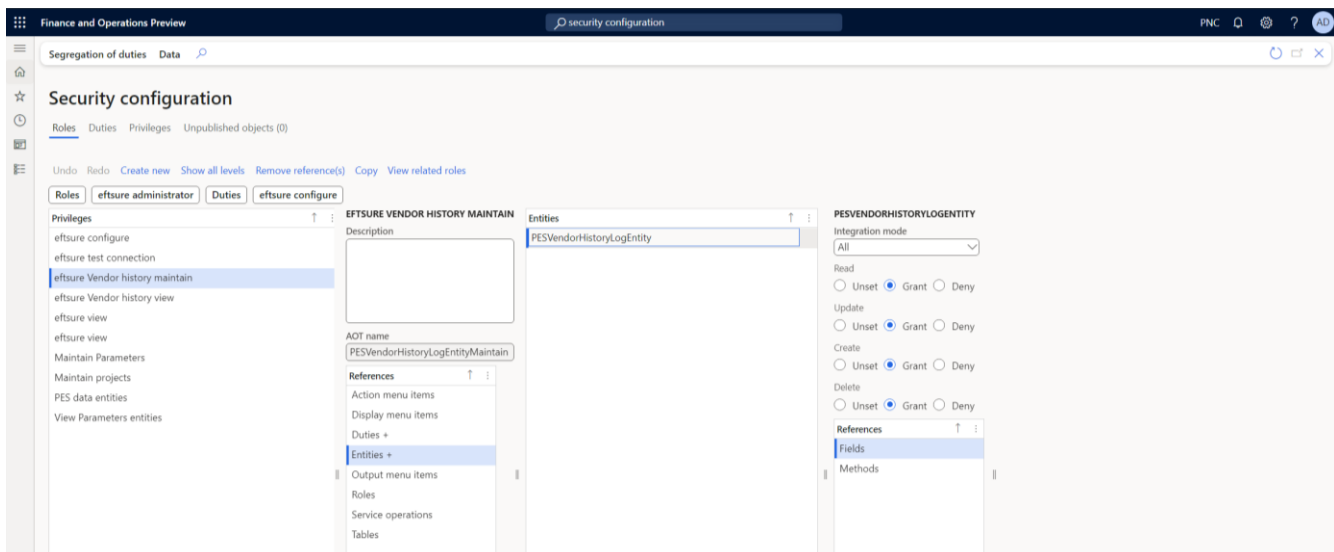
To customise eftsre security, please use System Administration > Security configuration tool.

For more information, please visit:

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/role-based-security>

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/import-export-customized-security>

The screenshot below shows customisation of eftsre permissions for a specific role/duty/privilege.



CONFIGURATION IMPORT / EXPORT

Data entities are used for configuration import / export, in order to facilitate saving / restoring configuration over multiple/refreshed environments.

In the Parameters form, use the configuration button to save restore configuration:

