



RELEASE NOTES

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Introduction

Support for employee onboarding can be achieved using an Employee restricted onboarding form.

This document describes the changes required for employee onboarding, compared to the standard onboarding flow for organisation type vendor.

if the onboarding form is configured in eftsure portal as **restricted to Employee**, then the vendor that will be created will be of type **person** (rather than organisation)

For all other onboardings, the vendor type being created will remain **organisation**.

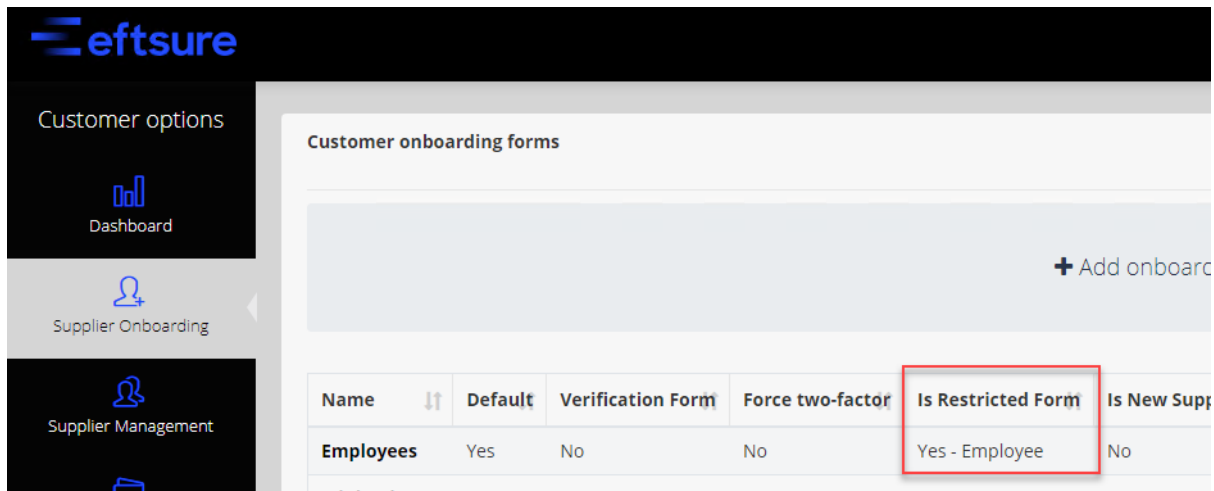
Setup

Onboarding form

Onboarding forms have to be configured directly into the eftsure portal, then synchronised down to Dynamics 365 FO.

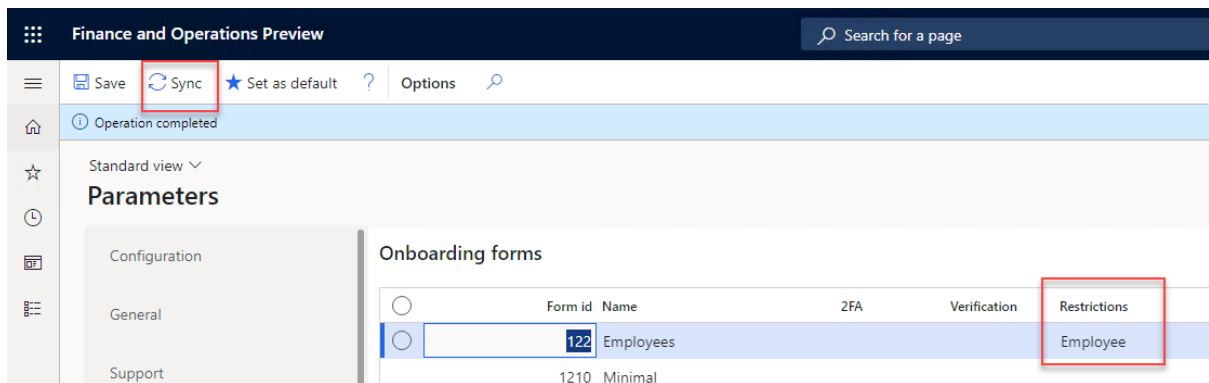
Eftsure portal

Configure at least one form with Employee restriction in the eftsure Portal



D365FO

Then Go to the eftsure Parameters form > Onboarding Forms > Sync button in D365 and make sure the new form definitions have been downloaded and are fully in sync.



Vendor Group

In eftsure Parameters form > Vendor groups, configure the desired vendor groups.

Optional: In red, configure the desired vendor group to use the new employee onboarding form from the previous step.

Optional: in orange, add a new display option to the **+ New** menu on Vendor form

The screenshot shows the 'Parameters' form in the 'Vendor groups' section. The left sidebar lists various configuration categories, with 'Vendor groups' selected. The main area is titled 'Vendor group(s) configuration' and contains a list of vendor groups on the left and configuration options on the right. The 'Employees' vendor group is selected. The configuration options are grouped into sections: 'Automation', 'Display', 'Forms', 'Hold', 'Self-certification', 'Default invitation email', 'GST Validation', 'Bank Provisioning details', and 'Vendor collaboration'. The 'Display' section is highlighted with an orange box, showing the 'Onboarding wizard custom label' set to 'Employee', 'Show in workspace New menu' set to 'Yes', and 'Order' set to '5'. The 'Forms' section is highlighted with a red box, showing 'Allow change on invitations' set to 'No', 'Default onboarding form' set to 'Employees', and 'Default change request form' set to 'Employees'.

Finance and Operations Preview

Search for a page

Save ? Options

Standard view

Parameters

Configuration

General

Support

Onboarding forms

Invitations

Greeting

Payments

Vendor groups

ABR

AusPayNet

Attachments

Addresses

Contact Information

Verifications

Vendor collaboration

Vendor group(s) configuration

This section allow the configuration of specific options for each vendor group, in order to facilitate different behaviour, further automations, simpler onboarding processes...
Select the appropriate Vendor group on the left and configure it's options below:

Automation

Display

Onboarding wizard custom label
Employee

Show in workspace New menu
Yes

Order
5

Forms

Allow change on invitations
No

Default onboarding form
Employees

Default change request form
Employees

Hold

Self-certification

Default invitation email

GST Validation

Bank Provisioning details

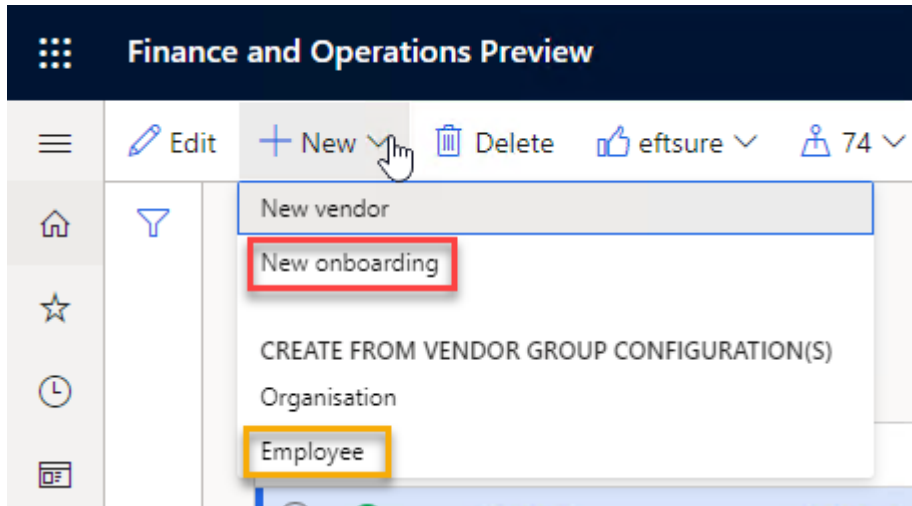
Vendor collaboration

Operations

New employee onboarding

In orange: Create New onboarding related to a vendor group related to an onboarding form that is employee restricted

In red: Create new onboarding where onboarding form can be manually changed by the user



Onboarding wizard

The onboarding wizard is self updating when the onboarding form is modified, to match the configuration for the onboarding form.

When the onboarding form is employee restricted, All company info, ABN information are hidden

When the onboarding form is not employee restricted, the standard wizard will be displayed.

A screenshot of the 'New vendor onboarding wizard' form in the 'Finance and Operations Preview' application. The top navigation bar is dark blue with a search bar, 'PNC', and user profile 'AD'. The sidebar on the left shows 'Standard view' and the title 'New vendor onboarding wizard'. The main content area is divided into two sections. The left section has a blue dot next to 'Employee'. The right section contains the form fields. Under 'CONTACT DETAILS', there are 'First name' and 'Last name' fields, both marked with an asterisk. Under 'PHONE', there is a note: 'At least one phone number is required to send an onboarding - if the onboarding form is 2FA, then mobile becomes required.' Below this are 'Mobile' and 'Landline' fields. There is an 'Email' field marked with an asterisk. Under 'OPTIONS', there is a 'Vendor collaboration' toggle set to 'No'. At the bottom, there are three buttons: 'Back', 'Send invite', and 'Cancel'.

Onboarding values

When reviewing onboarding values, the following values will be returned for user validation.

My view ▾

Onboarding values for Vendor Jona Simona - As completed by Jona Simona

Onboarding id: 37001 | SupplierCode: PNC-001072|ING Bank1 | Matched supplier: Form Employees | Small business: ☒ Yes | IP of onboarding supplier: 14.200.131.189

Company Representative Details

Representative First Name	Representative Last Name	Representative Position
Jona	Simona	Employee

Eftsurre Information

Other Information

Payment Information

Physical Address

Trading Name Information

Customer Assigned Entity Name	Customer Assigned Entity Reference	Main Trading Name	Other Trading Names
		Jona Simona	

Verification Status

Field list

TradingNameInformation | CustomerAssignedEntityName

Log

Show in eftsurre | Actions ▾ | Close

New Typed Person Vendor

When the vendor is created, the following fields will be set directly on the vendor, still enforcing the 1 click to create vendor rule

Finance and Operations Preview

Save | New | Delete | eftsurre | 4 | Vendor | Procurement | Invoice | General | Options

Vendors | Standard view ▾

PNC-001072 : Jona Simona

General

Change party association

IDENTIFICATION

Vendor account: PNC-001072

Type: Person

Personal title: EMP

First name: Jona

Middle name:

NAME DETAILS

Last name: Simona

Search name: Jona Simona

Personal suffix:

Group: EMP

Known as

Known as: Jona Simona

Display as: FirstMiddleLast

PERSONAL INFORMATION

Professional title: Employee

Professional suffix:

Phonetic first:

Phonetic middle:

Phonetic last:

Gender:

Marital status: None

BIRTHDAY

Month:

ANNIVERSARY

Month:

OTHER INFORMATION

Address books:

Language: en-gb

Children:

Hobbies:

VENDOR COLLABORATION

Collaboration activation: Not Active