

eftsure



RELEASE NOTES

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

Contents

Introduction	3
Setup	4
Onboarding form	4
Eftsure portal	4
D365FO	4
Vendor Group	5
Operations	6
New employee onboarding.....	6
Onboarding wizard.....	6
Onboarding values	7
New Typed Person Vendor	7

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 onboarding, the vendor type being created will remain **organisation**.

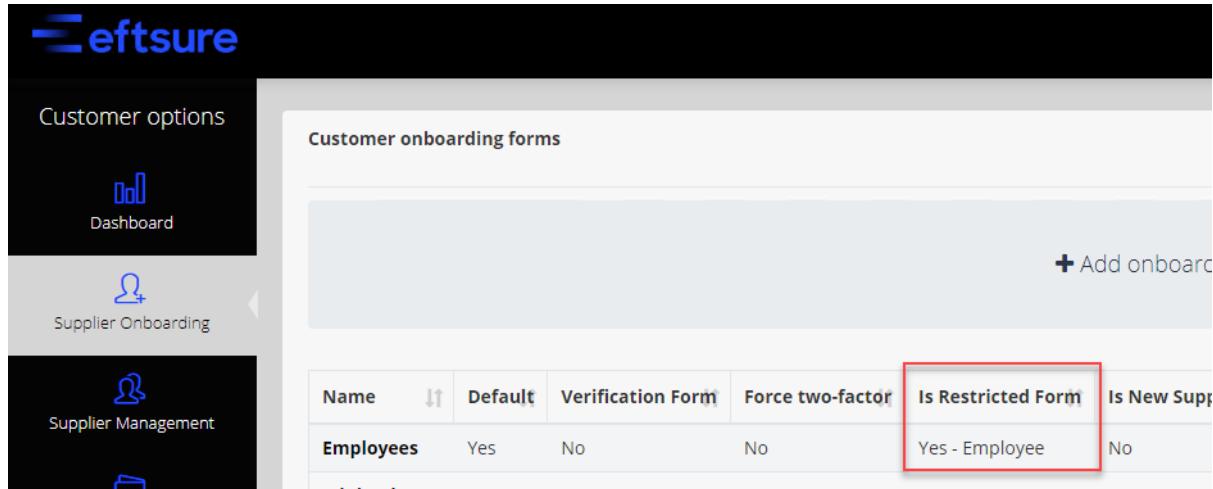
Setup

Onboarding form

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

Eftsure portal

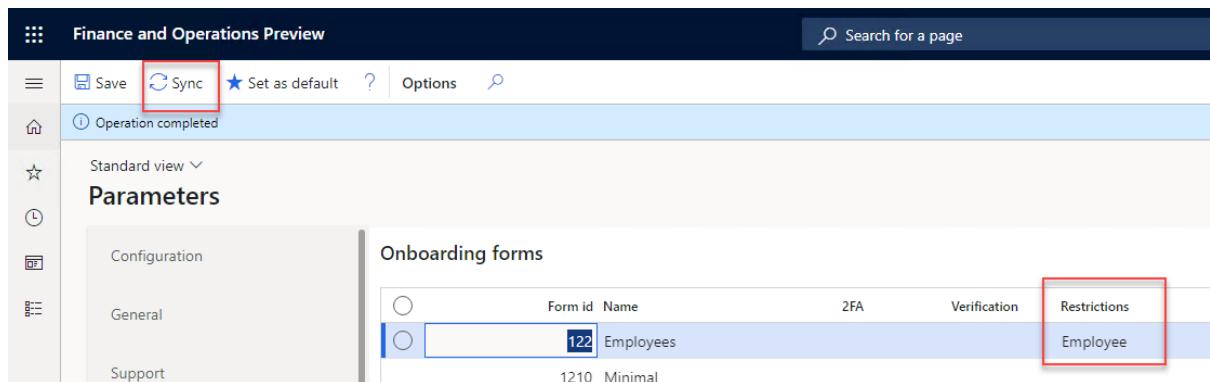
Configure at least one form with Employee restriction in the eftsure Portal



Name	Default	Verification Form	Force two-factor	Is Restricted Form	Is New Supplier
Employees	Yes	No	No	Yes - Employee	No

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.



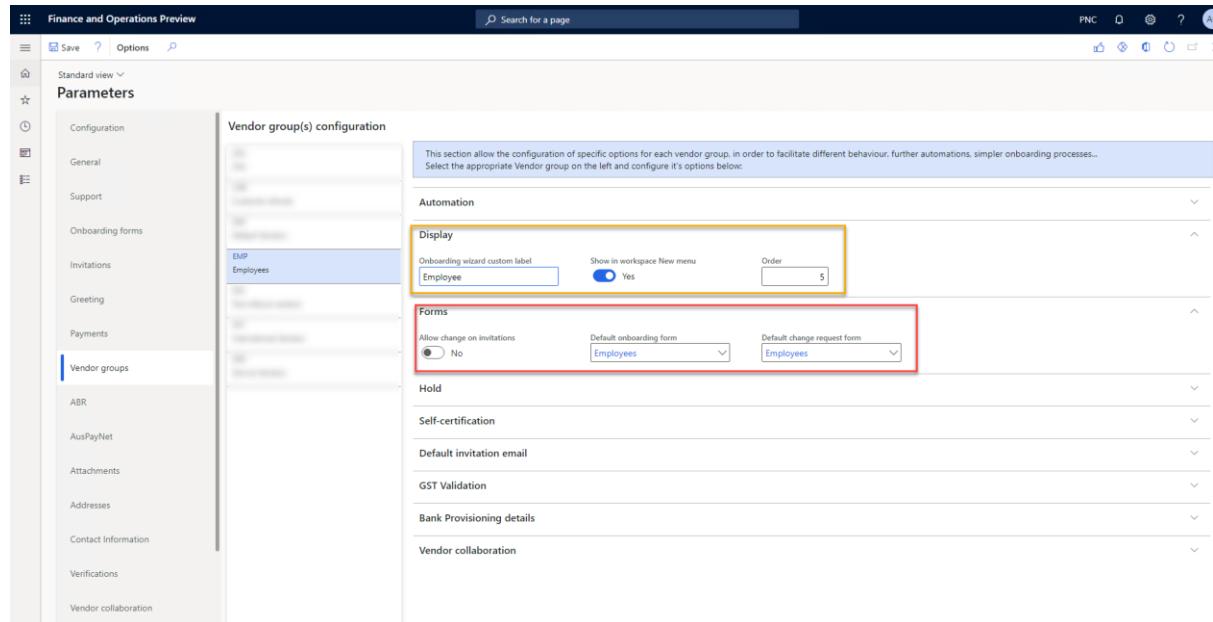
Form id	Name	2FA	Verification	Restrictions
122	Employees			Employee

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



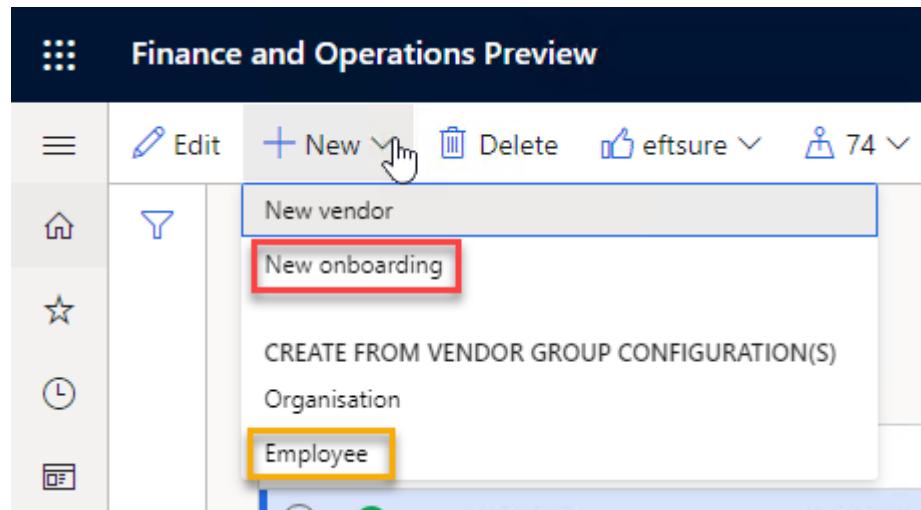
The screenshot shows the 'Parameters' section of the eftsure application. The left sidebar lists various configuration categories, with 'Vendor groups' selected. The main area is titled 'Vendor group(s) configuration' and shows a list of vendor groups, with 'EMP' and 'Employees' highlighted. The 'Display' section is highlighted with an orange box, containing settings for the onboarding wizard custom label ('Employee'), showing in workspace New menu ('Yes'), and order ('5'). The 'Forms' section is highlighted with a red box, containing settings for allowing changes on invitations ('No'), default onboarding form ('Employees'), and default change request form ('Employees'). Other sections like 'Automation', 'Hold', and 'Self-certification' are also visible.

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

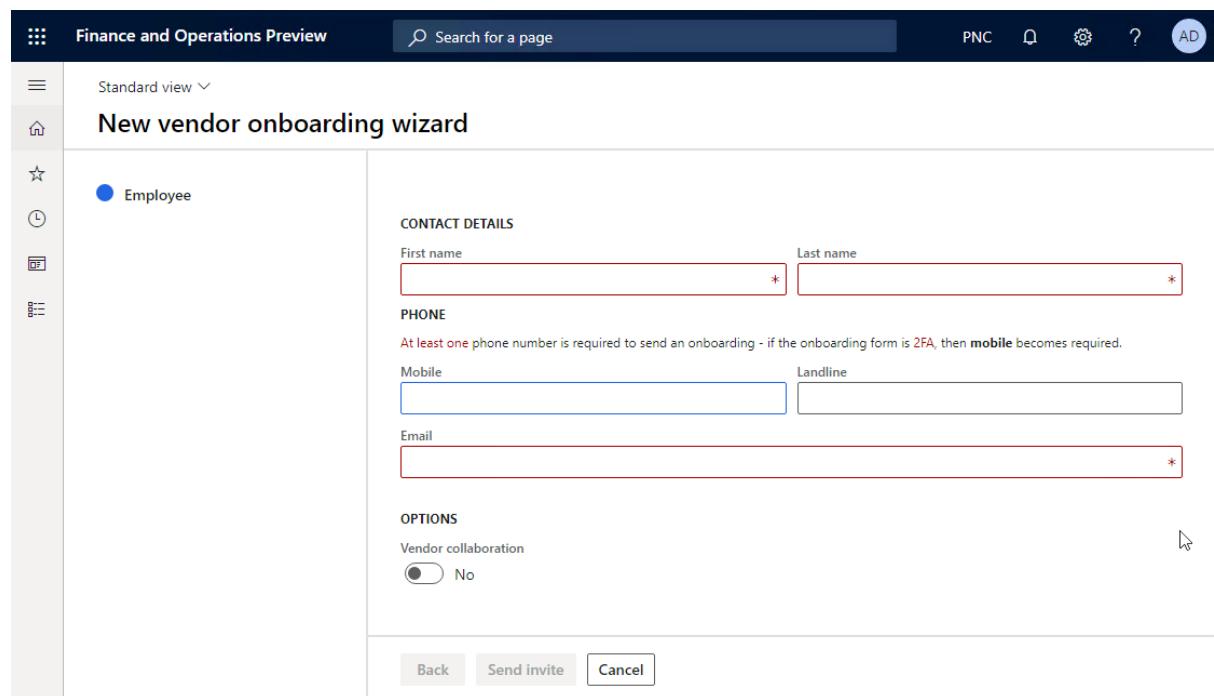


Onboarding wizard

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.



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 Supplier Code: 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: Jona Representative Last Name: Simona Representative Position: Employee

Eftsure Information

Other Information

Payment Information

Physical Address

Trading Name Information

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

Verification Status

Field list

Log

Show in eftsure 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

Vendors | Standard view ▾

PNC-001072 : Jona Simona

General

IDENTIFICATION

Vendor account: PNC-001072 Type: Person Personal title: Group: EMP First name: Jona Middle name:

NAME DETAILS

Last name: Simona Search name: Jona Simona Personal suffix: Group: EMP Personal title: Employee Professional suffix: Phonetic first:

KNOWN AS

Known as: Jona Simona Display as: FirstMiddleLast Phonetic middle: Phonetic last: Phonetic first:

PERSONAL INFORMATION

Gender: None Marital status: Phonetic middle: Phonetic last: Phonetic first: Phonetic middle: Phonetic last: Phonetic first:

BIRTHDAY

Month: Day: Year: Month: Day: Year:

OTHER INFORMATION

Address books: Language: en-AU Children: Hobbies: Month: Day: Year: Month: Day: Year:

ANNIVERSARY

Month: Day: Year: Month: Day: Year:

VENDOR COLLABORATION

Collaboration activation: Not Active