

eftsure

RELEASE NOTES

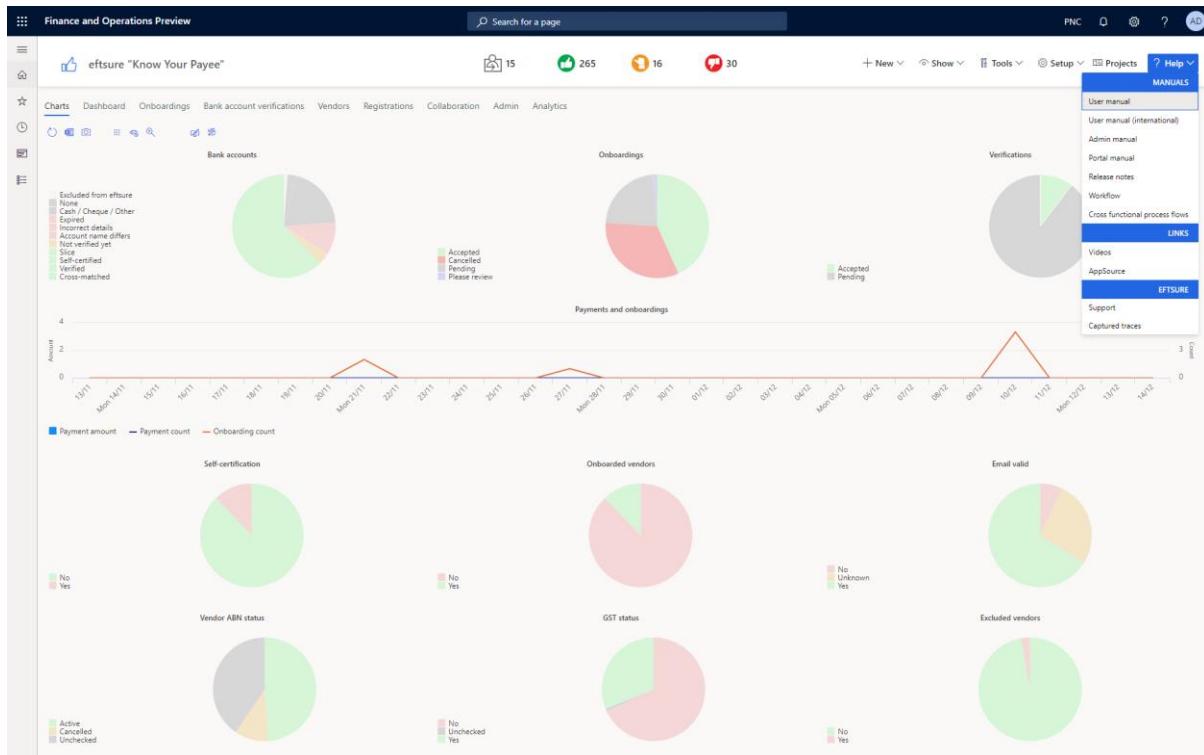
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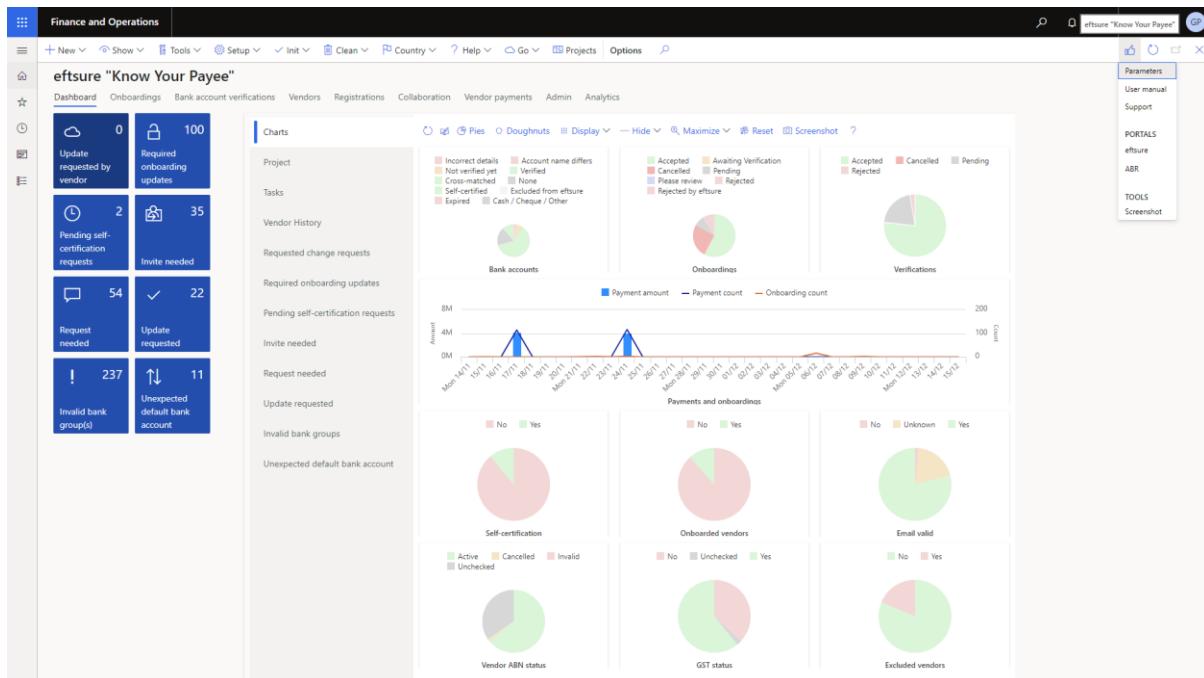
Introduction

This release has a focus on User Interface redesign to make our screens easier to use and increase usability. The workspaces, charts, menus, toolbars have been redesigned to help the user access key features faster.

Look and feel after this update:

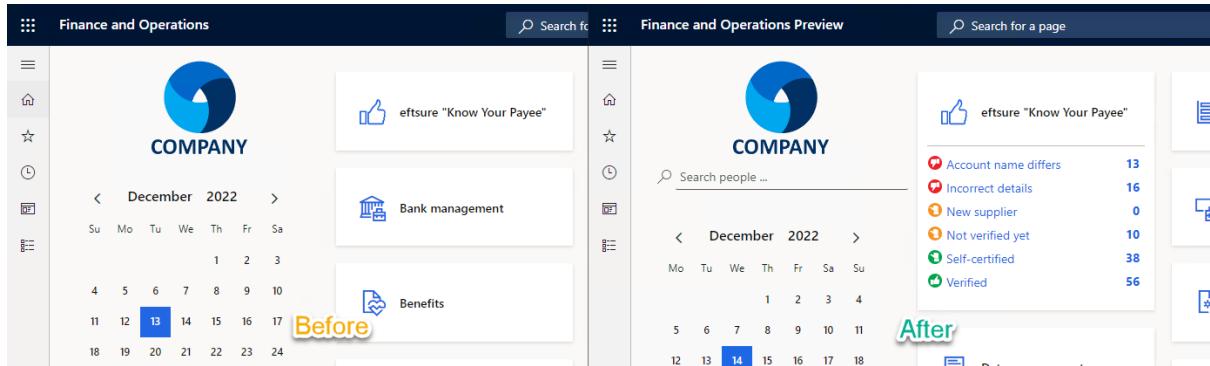


Look and feel before this update:



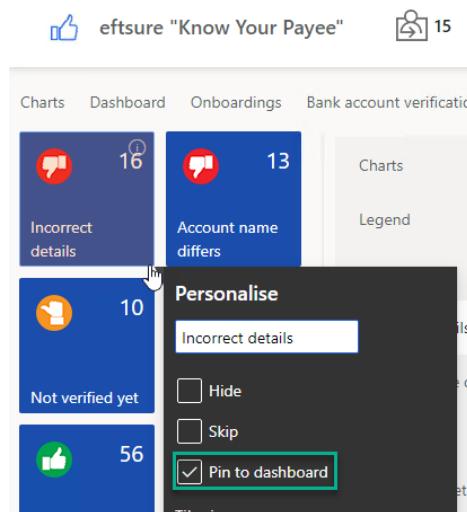
The new UI update also maximise screen real estate to maximise viewing experience and avoid lost screen space.

Home Page



The tiles from eftsure 'Know Your Payee' workspace can now be pinned to the main dashboard, and will also include eftsure green, orange, red icons for increased visibility.

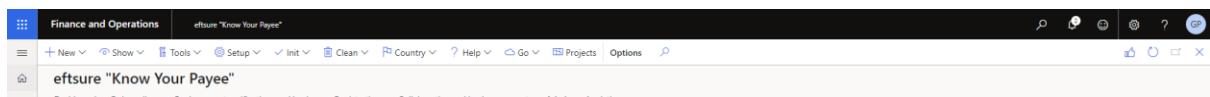
To achieve this, go to the eftsure 'Know Your Payee' workspace, select any tile, Personalise <TileName>, Pin to Dashboard, and voila!



Navigation:

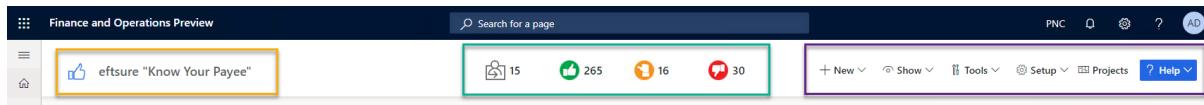
Before:

The eftsure 'Know Your Payee' workspace used to look like the following, with no icons, no headers, just a single menu in the appBar.



After:

The eftsure 'Know Your Payee' workspace has additional navigation features to quickly navigate to the main features:



The eftsure logo and text, in yellow, will help you navigate to the eftsure portal (Live, UAT or Sandbox, depending on configuration), and will match user theme.

The eftsure icons, in green, represent the status of your vendor master file, and will help you navigate to the relevant matching forms:

Count of pending onboarding, navigates to the onboarding screen,

Count of green suppliers, navigates to the list of **Verified** suppliers,

Count of orange suppliers, navigates to the list of **Not verified Yet** suppliers,

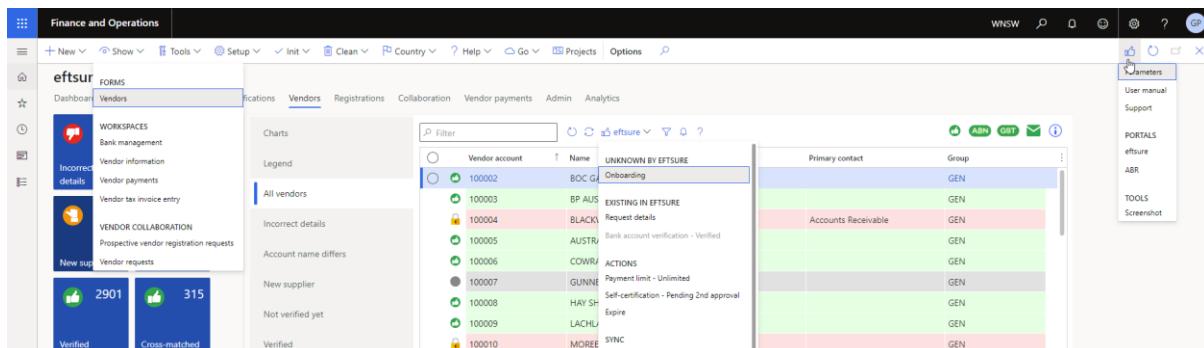
Count of red suppliers, navigates to the list of **Incorrect details** suppliers,

The eftsure menu, in purple is the same menu as previously, but in the form header rather than AppBar.

Menus

Before:

The menus offered a pale representation of the available options, making it hard to differentiate the headers from their options. As the number of options available in the menus grew, the menus become harder and harder to read/use.



After:

All menus have been redesigned to highlight headers according to theme, and right alignment. The menu items have also been rearranged into their matching categories:

The screenshot displays the Microsoft Dynamics 365 Finance and Operations interface. At the top, there is a navigation bar with links for 'Finance and Operations Preview', 'Search for a page', and various system status indicators (15, 265, 16, 30). Below the navigation bar is a top-level menu with links for 'Charts', 'Dashboard', 'Onboardings', 'Bank account verifications', 'Vendors', 'Registrations', 'Collaboration', 'Admin', and 'Analytics'. A 'eftsure "Know Your Payee"' ribbon is visible. On the left, there is a sidebar with a 'Charts' section showing counts for 'Incorrect details' (16), 'Account name differs' (13), 'Not verified yet' (10), 'New supplier' (0), 'Verified' (56), and 'Cross-matched' (152). The 'Vendors' section shows a list of vendor accounts with columns for 'Vendor account', 'Name', 'Status', and 'Actions'. A modal window titled 'UNKNOWN BY EFTSURE' is open, showing details for vendor 'AAR001' (ACROS Onboarding). The 'Registrations' section shows a list of registrations with columns for 'Primary contact', 'Group', and 'Actions'. A 'LINKS' section on the right provides links to 'User manual', 'Admin manual', 'User manual (international)', 'Portal manual', 'Release notes', 'Workflow', 'Cross functional process flows', 'Videos', 'AppSource', and 'Captured traces'. A 'EFTSURE' section is also present.

Charts

Projects

Toolbars

Workflow viewers