eftsure inside D365FO

Release notes

WHAT'S NEW?

This topic lists features that are new or changed for eftsure inside Dynamics 365 for Finance and Operations.

This document contains the release notes for the very latest version of eftsure inside Dynamics 365 for Finance and Operations, currently available in LCS. We only maintain one version on LCS at all times.

Use these notes to check for new features based on your specific version.

Our versioning follows a specific pattern:

[MajorVersion].[Build].[Preview].[Changeset]

Major Version: Major version number (1 for AX2012, 2 for D365, 3 for D365UI, 4 for International)

Build: Build server platform update – Minimum platform update, deployment will not work below this update version.

Preview: Dev server platform update – Maximum Preview Version used for dev/test, higher platform update are not available at time of release, use at your own risk on higher platform updates.

Changeset: DevOps changeset number, used to track historical code changes.

For example:

Version x.**38**.**40**.yyyy:

is valid for D365 release 10.0.38, 10.0.39, 10.0.40,

hasn't been tested against 10.0.37 and below,

hasn't been tested against 10.0.41 and above.

Starting version 5.0, you will notice the following warning in the workspace:

Release 4.44.46.1706 – January 2026
Support for **eftsure icon** in **Workspace area** of [Immersive Home](#) (v10.0.44+)

Release 4.44.46.1707 – January 2026
Added upgrade script for AusPayNet removal

Release 4.44.46.1705 – January 2026
Fixes for change requests form section selection

Upgraded library [libphonenumber](#) to [9.22.0](#) for [libphonenumber-csharp](#) as published January 17th 2026

Removed AusPayNet, fixed Renci DLL issue

Release 4.44.46.1701 – January 2026
eftsure inside ExFlow compatible with [ExFlow 2.18.0](#)

Fixes for vendor collaboration issues

Release 4.44.46.1698 – December 2025
Fixes for tracing pane with eftsure inside ExFlow

Release 4.44.46.1687 – December 2025
Fixes for vendor collaboration issues

[Verify new bank accounts](#): automate the verification process for all new bank accounts (AU & NZ) created in the last 24 hours (manually added or through an integration).

Release 4.43.45.1672 – November 2025
SmallBusiness flag is now used for creating/updating vendors during onboardings only (declarative), no longer synced during **Sync from eftsure**, to allow manual user changes for PTRS.

Check a Payee: added bank account id control, defaulted from Parameters > Onboarding > General > Bank account id prefix

Release 4.43.45.1664 – November 2025
Fixes for Workspace > **new vendor** button using record templates

Fixes for onboardings with vendor group number sequences (Manual)

Release 4.43.45.1655 – October 2025
Check a payee:

Fixes for templates issues without security permissions

Create vendor now requires VendTableMaintain privilege

Create customer now requires CustTableMaintain privilege

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Release 4.43.45.1652 – October 2025

Fixes vendor hold/blocked changes:

> New Parameters > Vendor groups > Hold: New Reason code columns.

> Adding hold changes to history, including reason code.

> Applying hold to copied vendors

> New business event (Parameters > Business events > PES_VendBlockedStatusChangeEvent)

> New delegate PESBlock.onBlockedStatusUpdate()

Release 4.43.45.1651 – October 2025

Fixes verification status for Change request with self-certified vendor bank account

Release 4.43.45.1647 – October 2025

Include **eftsure > Open > History** view for eftsure User role

Release 4.43.45.1635 – September 2025

Fix for verification DoSend flag

Fix for performance issues while creating vendors

Fix for incorrect vendor details during verification

Release 4.43.45.1622 – September 2025

Fix for too many email in verification issue.

New Clear button on Dashboard > Requested updates to clear such records.

Release 4.43.45.1607 – September 2025

Support for v10.0.45

Fixes for Supplier Sync

Release 4.42.44.1559 – August 2025

Fixes for PESTaxVATNumTable

Release 4.42.44.1558 – August 2025

Deprecated BankAccount change log, see Upgrade White Paper.

New Recommendation: CCDS Sharing PESVendorHistoryLog

Fixes for IBAN

New open in Excel button in toolbars

Fixes for Vendor History logs

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Fix for data entities (payment verification statuses).

New Parameters > Cross Company Data Sharing

Fix for Process automation

Release 4.42.44.1524 – June 2025
Fixes for retry verification error when retrying from vendors or bank accounts.

Release 4.42.44.1522 – June 2025
Fixes for retry verification error when opening from vendors or bank accounts.

Release 4.42.44.1521 – June 2025
Fixes for vendor manual number sequences

Fixes for check a payee workflow issues

Fixes for email templates being overwritten on user creation

Added DataAreaId into SupplierCode

Batch sending change requests

Release 4.42.44.1510 – May 2025
Fixes for Support Nature of Enquiry

Release 4.42.44.1509 – May 2025
Fixes for Vendor hold statuses

Fix for vendor invoices

Release 4.41.43.1505 – May 2025
Fixes for consolidated payments

Release 4.41.43.1496 – May 2025
Fix deep links when no URL is available

Release 4.41.43.1492 – May 2025
Payment proposal fix for disabled legal entities

Updated logs for bank account copies across legal entities

Release 4.41.43.1483 – April 2025
Support for vendor change party association

Release 4.41.43.1482 – April 2025
Bank account country sync fixes

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Release 4.41.43.1480 – April 2025

Config check: now validating workflow users

Support: New attachment: config check as HTML file

Release 4.41.43.1478 – April 2025

Eftsure icons on Reports (Vendor Payment Journal / Payment)

Parameters > User Interface > Reports (Opt out)

Workspace > Help > White Papers > Advanced > Reports

Release 4.41.43.1472 – April 2025

Payment Journals:

Configuration for Disabling Payment button in User Interface \ Extend – (Perf impact)

      Updated icons and wording for invalid payments

Fix for configuration of purposes (Using name rather than description in multi lookup)

Out of sync: New in Workspace charts and vendors

Release 4.41.43.1466 – April 2025

Eftsure icons and fixes for purchase orders and open vendor invoices

Fixes for empty or manual number sequences

Out of Sync status improvements

Workspace > Onboardings: fix for order of status tabs

Create Payment Proposal > exclude invalid payments

Support now available for all users (end user and key user modes)

Release 4.41.43.1460 – March 2025

Change request sections can be enabled by default in Parameters \ Onboarding \ Forms \ Enabled for change requests

Release 4.41.43.1455 – March 2025

Fixes for international bank accounts

Fix for OData 'ambiguous error'

Release 4.41.43.1451 – March 2025

New Parameters > Business events

OData Actions

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New action for sending verifications

Updated naming conventions

Release 4.41.43.1444 – February 2025

New Out Of Sync status, see supplier sync issues for more details.

Parameters form fixes.

Release 4.41.43.1444 – February 2025

Self certification email fix

Label improvements/clarifications

Release 4.41.43.1439 – February 2025

Project visual improvements

Performance fix refresh while bank accounts form close

Support for 10.0.43

Release 4.40.42.1432 – February 2025

ABN Validation & Lookup: fixes & retry

Release 4.40.42.1429 – February 2025

ABN Validation & Lookup: fixes

Release 4.40.42.1423 – February 2025

Support for ExFlow AP 2.16.1.4

Release 4.40.42.1419 – January 2025

Support for Feature 'Saved views for Workspaces'

Release 4.40.42.1418 – January 2025

Security improvements for main workspace Tools.

Release 4.40.42.1417 – January 2025

Improvements for User assistance (Onboardings/Verifications)

Release 4.40.42.1404 – December 2024

Retry verification

Workflow updates for Vendor disbursement workflow

Projects: Hypercare mode for completed projects

Support for upgraded versions of:

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ExFlow AP 2.16.0.21

XePaymentDynamicsFO 3.10.0.0

Release 4.39.41.1388 – December 2024

Support tools update

AU BSB and NZ branch formatting options

Issue TaxVATNumTable fixed

Onboarding drafts: New email type configuration

Release 4.39.41.1373 – November 2024

Fixes for Accepted verifications triggering new verifications on save.

Release 4.39.41.1369 – October 2024

Onboarding drafts and approvals

Fixes for charts

Self certification notifications for level 2

Onboarding and Verification documentation updates (Clarity/SLA/HelpTexts/FlowCharts)

Release 4.39.41.1352 – October 2024

Fixes for Landline phone numbers, testing

Ability to resend verifications (with updated details)

Updated use of phone number acknowledgements

Release 4.39.41.1339 – September 2024

Fixes for ABN and sync from eftsure

Release 4.39.41.1321 – August 2024

Fixes for phone number validations

Release 4.39.41.1303 – August 2024

Fixes for verifications

Security updates for vendor edit bank account details

Release 4.39.41.1294 – August 2024

Fixes for verifications

Release 4.39.41.1290 – August 2024

Parameters \ User Interface \ Phone Number validation

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Release 4.39.41.1289 – August 2024

Security permissions update for Check A Payee - Create new Customer/Vendor from template

Fix:

> Onboarding and Verification mismatch for cancelled onboardings

Release 4.38.40.1287 – August 2024

Search for duplicates: search fixes

Check A Payee:

> Fix incorrect isoCode in party address CountryRegionId when creating new Customer/Vendor

ExFlow:

> Updates for latest ExFlow release

Release 4.38.40.1276 – June 2024

Fixes for Vendor search

Release 4.38.40.1271 – May 2024

Onboarding > New option for ApproveUseMobileForVerification

Batch

> Schedule updates

> New verification batch

Release 4.38.40.1257 – May 2024

Fixes for international, data migration

Release 4.38.40.1243 – May 2024

Support for TLS 1.3

Parameters > Onboarding > Forms > Contact Infos

Improvements:

> Support for international bank accounts

> Support for NZ legal entities

> File upload control

> Exclude Vendors : Allow re-exclude vendors

> Admin >

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New Upgrades cockpit using new 'eftsure Upgrade' monitoring category

Logs (New Url)

Help >

Manual testing

Automated

White Paper: Vendor Group number sequence

Fixes:

Filter button

Config Import / Export

ExFlow:

Support for ExFlow latest version

UI updates

Adding GST Status icons next to GST Amounts

Updated user guide

Release 4.37.39.1221 – April 2024
Fix :

ABN lookup with No Guid

Use Number Sequence from Vendor Group where available

Release 4.37.39.1215 – April 2024
Generate payments: Verified methods of payment no longer allow excluded bank accounts, please use a non-verified method of payment for excluded vendors and bank accounts.

Release 4.37.39.1211 – April 2024
All documentation moved to cloud storage rather than Software Deployable Package

Testing: Displaying multiple versions for TheTestMart test suite runs

Fixes:

Undo SelfCertify

Include / Exclude

Data viewer expand/collapse

'Field not found VendPaymModeTable' when opening parameters

Release 4.37.39.1177 – March 2024

Updated test scripts and TheTestMart

New security roles dedicated to eftsure: eftsure User / eftsure Manager / eftsure Self Certifier

Release 4.32.39.1168 – February 2024

New Help

White Papers >

Electronic Reporting

Maps API Keys

Videos recording for Tests and TheTestMart

New Tools > Data Reconciliation

Parameters >

Users > Naming conventions

User Interface > Maps & Autocomplete

Cross company data sharing

Adding Vendor group configuration table to shareable tables.

Release 4.32.39.1164 – February 2024

Projects > Budget updates and new gauge control

New Filter button available on all screens (opt-out in user options), deprecated Payment Journal Filter button

Payment proposal: Added eftsure menu and filter button

Release 4.32.38.1159 – February 2024

Projects > Budget, Archive, Reports, Report templates

Improved support for upgrade scripts

Release 4.32.38.1155 – January 2024

Supplier Sync fixes for Batches and Sync Cockpit

Tools\Change Supplier Codes: Go live tools to change supplier codes

Export to Excel button in Workspace toolbars

Projects:

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New Projects summary

Generation updated to match real life scenarios

HMRC (UK) & VIES (Europe) VAT Number validation

Parameters \ Batches \ Unknown Suppliers

Help:

White Papers > Data Integrity, VMF Export, Maintenance

Portal > International (moved from Parameters)

All File downloads now using standard file save dialog for Download/SharePoint/OneDrive,

File save dialog: new eftsure cloud option for projects and configuration exports only

Menu > Actions > Email: Now also available for onboardings

Release 4.32.38.1151 – December 2023
Updated icons, documentation, new Check a Payee White Paper

Supplier Sync fix

PhoneNumber validation fixes

Release 4.32.38.1141 – December 2023
New Quick Email to send vendor notifications, heads-up emails... (Replaces Vendor Collaboration email feature to resend portal link)

Color for Inactive or Blocked or Expired now grey rather than red

Journal validation error fix for non payment journals

Bank account lookup fixes

Release 4.32.38.1132 – November 2023
Workspace counts updated, now based on vendor default bank account

License framework improvements (cloud recording of environments versions)

Default overridable GST Group on onboardings

Release 4.32.38.1129 – November 2023
Webservices abort issue fixes

Release 4.32.38.1126 – November 2023
Invite Banking options, can now send Cash\Cheque\Other\BPay alone

Parameters \ Onboarding:

General: YourAccountNum - new options and previewer

Contact Information: Ability to format local phone number to national format

Addresses: Name option for both types of addresses

Extended bank account lookups added to payment journal lines

Payment verifications: Now verifying negative amounts too

Vendor invoice journal icons permissions fix

Release 4.32.38.1119 – November 2023
Email validation fixes

Release 4.32.38.1118 – November 2023
Payment validation fixes for blocked vendors

Security: Removed Maintain and Configure duties from eftsure Admin roles

Release 4.32.38.1117 – November 2023
Support for **International** onboardings, suppliers & payments

Support for Country **New Zealand** with NZBN lookup capabilities

Support for Xe.com payment verifications, when using Xe D365FO extension

Updated **icons** & animation

Gov id (ABN/NZBN):

Lookup redesign / Search as you type

Updated GovId Tabs in Vendor/Customer/Legal entity

Preview part (Enhanced Previews) now available on Gov Icons in grids

User options:

Move Gov id (ABN/NZBN) before party name to speed up vendor creation

Workspace

> Header > New refresh button for all form parts

> Onboardings > Awaiting customer assistance (matching verification)

> Vendors > New status sections for full coverage

Blocked

Excluded from eftsure

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> Tools > Rename > Supplier Codes

> Help > Testing

Regression Testing

Test scripts (Configure in Parameters)

Sandbox rules

Parameters

Vendor Copy > Mapping configuration for 'Add vendor to another entity'

Data Entities > Management screen for eftsure data entities

Cloud Storage > Management of DMF cloud files

Config > Import/Export Redesign

Check A Payee > Improved duplicates search and navigation to duplicate.

Payments > Now paging payments verification webservice for large payment journals

Tools > Screenshots now requesting user permission to capture screenshots (support, projects...)

Deployment – See Deployment Guide – Post Deployment activities.

New fields in CCDS to be added, Deprecated fields to be deleted – See CCDS White Paper.

Need to re-Init all enabled legal entities

Check Batches – Delete deprecated 'ABN Check' Batch – Ensure Business registration check batch runs immediately

Regenerate Data Entities

Release 3.24.48.1049 – September 2023

Fixes for Bank accounts workflow

Fixes for Cross Company Data Sharing

Release 3.24.48.1035 – September 2023

Workspace:

New **Tools** Tab

Bulk Rename available in Tools > Rename or in Vendors > Account Name Differs

Help

New **Task Recordings** section

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New **Mappings** White Paper

Vendor Search:

Extended Procurement and Sourcing > Vendors > Vendor Search

Added to Check Payee

Parameters:

Onboarding Tab: Redesign

New Onboarding **Default Values**

User List: Redesign

Logs > **Extended webservice logs** restricted by license option

Onboarding:

Bug Fix: Trimming empty characters at the end of FirstName and LastName to avoid duplicates.

Updated Ribbon Button

Release 3.24.48.1018 – August 2023
Performance fixes for vendor payments and UI Optimisation

Release 3.24.48.1016 – August 2023
Vendor Verification form:

UI Updates

Phone numbers no longer mandatory

Release 3.24.48.1015 – August 2023
Ability to change onboarding entity before vendor creation

Release 3.24.48.1013 – August 2023
Removed Workspace Analytics, now use standard Vendor Payment workspace

New Vendor Button fixes

Worskpace Tabs colors (Parameters > UI > Color Reset recommended)

Charts drill through improvements and fixes

UI Legend updates

Release 3.24.48.1009 – August 2023
Onboarding mappings index fix

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Release 3.24.48.1008 – July 2023
Workspace analytics tab issue fix

Release 3.24.48.1007 – July 2023
UI Improvements

Release 3.24.48.1004 – July 2023
Vendor Bank Account Id : now using Bank Financial Code (if available) rather than Bank name

Release 3.24.48.1003 – July 2023
UI & Theme Improvements:

>   Workspace layout & icons

>   Workspace legends

>   Service Health

ExFlow init improvements. Need to re-init all ExFlow enabled entities for re-calculation of GST flag.

Release 3.24.48.991 – July 2023
Improved alerts button now as drop menu with create and manage alerts options

Release 3.24.48.985 – July 2023
New Message Actions for No API Role, No PartnerId, Locked, Invalid OrigId

Release 3.24.48.977 – July 2023
OData fixes

Release 3.24.48.974 – July 2023
Support for RTL languages

DMF Entity refresh improvements for DMF Export/Import

Help: OData White Paper

Release 3.24.48.973 – July 2023
New self service cloud licenses, no more MS ISV License file (Previous files to be deleted from CI/CD)

New self service cloud license batch running on a monthly basis

Changed Support icon from Sad Face to Headset

Release 3.24.48.951 – June 2023
Vendors Blocked for Reason: Reason code to appear in tooltips hovering blocked icons.

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Release 3.24.48.946 – June 2023
UI & Theme updates.

Release 3.24.48.938 – June 2023
Test User Connection: If user has no API role or PartnerId, new option to send email to support to enable role will be displayed on the error infolog.

Improved error management

Fixed eftsure credentials setup issue in User options

Release 3.24.48.932 – June 2023
Workspace:

      Tools menu button moved to new Admin > Tools section

      Help menu button moved to new Help tab (with information from KB and eftsure inside D365)

Parameters > Users

Parameters > Payments > Methods of payments

Release 3.24.48.931 – June 2023
Import / Export from/to the cloud for easy archival, now available for Parameters and Projects

Admin > Logs: Form complete redesign

Workspaces redesign, New close buttons in top left

Fixed form splitter issues across all forms

Release 3.24.48.930 – June 2023
DragNDrop control for all file uploads (Proj logo & notes, support attachments, license import)

eftsure tab icons now matching current theme (in Vendor information workspace, documents, payment journals, user options…)

New OData action to interact from Flow, LogicApps…:

      PES.PESInvite to send invites

      PES.PESCheck to check Bank accounts

Release 3.24.48.921 – June 2023
New Upload Drag n Drop control / Used for New Projects

Improved header sections in Lookups for ABN and BankGroup

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Release 3.24.48.920 – June 2023

Parameters > Vendor Collaboration > HTML Customisations : New Template button to load defaults

UI, Info, Warning. Error improvements

Release 3.24.48.919 – June 2023

Parameters > Config > Export / Import from Cloud (v alpha), in order to facilitate environment configuration.

Release 3.24.48.918 – June 2023

Parameters > Support > Support email and High Priority Verification:

> Attempts to send emails via Cloud service rather than D365 Standard email batches which are often turned off in Sandbox environments. Fallback on email queue for redundancy.

> Changed Support icon from Question Mark to Sad Face

Admin > Webservice logs: Form redesign and renamed to Logs, new Log Type Cloud

Release 3.24.48.917 – May 2023

Projects:

> Open in Excel experience in Office button

> Bug fixes

Release 3.24.48.915 – May 2023

Instant Check:

> Eftsure, AusPayNet & ABN Verification

> Available in Workspace icon, Tools menu and Ribbon icon

> Send Invitations, Create from Vendor & Customer templates

Init & Reset Legal entities functions now multi-select, batchable, multithreaded for performance improvements

Entity types moved to Parameters > Country > Australia > Entity Types

License file fixes

Release 3.24.48.896 – May 2023

Parameters

> Export via DMF

> Vendor group configurable per legal entity

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Cloud archive export for configurations (alpha)

Webservices data viewer: auto expansion up to 3 levels

Support:

New Feedback form

Split support form into Support (Bugs) and High Priority verification email (in menu)

Release 3.24.48.892 – May 2023

Verifications:

Support for Awaiting Customer Assistance

Fix missing onboarding id on verifications

UI Hide: Ability to hide unused sections for Onboarding/Verifications/SelfCertifications…

Support for Cross Company Data Sharing

Company Activation: Allow multiple selection.

New eftsure menu action: Comments to add authorizer comments in interaction history

Release 3.24.48.889 – May 2023

New PESOnboardingField entity to enable onboarding questions external analysis

License self service options in Workspace>Help, Parameters and Licence forms

Parameters > UI > CSS for fixing different versions display issues

Redesign:

Verifications > Sandbox

Admin > VMF Export

Admin > VMF Transactions

Admin > Search

Release 3.24.48.876 – May 2023

Compatibility ExFlow 2.12.5.8

Onboarding details form redesigned for improved readability

New Project: Logo finder based on project name

Final move Payee infos onto entities

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Release 3.24.48.871 – April 2023

Admin > Batches: Improved navigation between batches / history and errors

Admin > Batches: Ability to change recurrence from workspace

Improved payment icons and text for non verified payment lines

Release 3.24.48.870 – April 2023

Moved Payee information into Vendor form on eftsure tab for faster access

New ABN sections on Vendors, Customers, Legal entities

Updated Parameters\User Interface with new options to remove form extension and restrict footprint

Bug Fixes:

> Charts cache batch now multi company

> Project import / export 255 char limit removed using XML instead of Excel

> User options fix when license is not installed

> Fix for pixel perfect icons & menus with various densities and themes

Release 3.24.48.869 – April 2023

Compatibility ExFlow 2.12.1.3

Fixed workspace title issue

Release 3.24.48.868 – March 2023

ABN:

> Not registered icon now orange (rather than red).

> Field value validation and error reporting

> Support for Legal entity form

Passwords:

> New Password strength control for parameters and user settings

> New Password strength check during configuration check

Release 3.24.48.867 – March 2023

Chart colours to match configuration (No longer Alpha / Experimental feature)

Parameters:

> New **Check** feature to verify environment configuration issues and help admins troubleshoot.

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Form UI redesign

Onboarding/Change requests:

New setup for Change Request text (vs Onboarding text only)

New greeting templates configurable in parameters

New button on invitation/change request text to select custom greeting

New placeholders for OurVATNum and Invited VATNum

Release 3.24.48.865 – March 2023

Updated workflow diagrams and SVG viewer for pan and zoom.

Release 3.24.48.863 – March 2023

Small business flag fixes

Release 3.24.48.857 – February 2023

Fix: Download Attachment issue when Webservices Logs are turned off.

New **configurable mapping** for onboarding fields (less custom development)

Updated workflows

New **Check configuration** feature in Parameters > General

Release 3.24.48.856 – February 2023

Updated SSL Certificate

Updated Build numbers for ExFlow model file

Release 3.24.48.853 – February 2023

Release notes stored online for up to date information

Release 3.24.48.848 – February 2023

Bug fix : Multiple primary contact information

Release 3.24.48.845 – February 2023

Invitation wizard:

Ability to provide 0 phone numbers during invite to match eftsure portal

Form moved to first page to highlight mandatory mobile for 2FA forms

Bug fixed: Ability to send multiple invites to the same email address (except Vendor collaboration)

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Accepting onboarding now creates vendor **without** prompt, saving multiple user interactions in the flow. Reviewing Onboarding fields need to occur **before Accept**, rather than after Accept and before create vendor.

The following messages will no longer be requesting manual user approval but instead automatically approve:

```
Would you like to insert/update vendor(s) with the latest onboarding details?
```

```
Some onboarding(s) is/are still at 'Awaiting verification' status, and haven't been verified by
eftsure yet. If you accept these onboardings now, the vendor will not turn green until either
self-certification or verification completes. Do you wish to continue?
```

Release 3.24.48.843 – February 2023

Attachments framework :

UI Improvements on onboardings and standard attachment form

Release 3.24.48.842 – January 2023

Vendor Group Hold/Block

Now under PESBlock configuration key, needs manual configuration for activation

New exception for manual status

Process Flows: Improved UI, Image display width 100%, link to open in a new window

Release 3.24.48.840 – December 2022

Expiring Documents:

New form available in Workspace \ Onboardings

New email reminder via Batch

New configuration in Parameters

Ability to toggle notification per attachment on onboarding values > attachments and on Expiring documents form.

Release 3.24.48.839 – December 2022

New UI – Version #3.0

Updated all workspaces UI with headers and full width

Updated charts with full width

Updated menu separators

Updated services page for eftsure in Services health

Updated Admin \ Batch Jobs

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ABN icons on Customer lists

Project DMF Import/Export issues resolved

ABN Lookup : Fixed display for View & Edit mode

Webservices for eftsure API – removing basic auth headers for compliance

Release 2.24.48.835 – November 2022
Creation of Vendor type Person for Employee onboarding forms, rather than organisation

Release 2.24.48.834 – October 2022
Support tool improvements

Bank accounts verifications dialog improvements

Allow onboarding fields attachments download via new button

Release 2.24.48.831 – October 2022
Improved visibility on transactions with negative amounts

Updated project methodology

Release 2.24.48.826 – July 2022
Updated libraries

Release 2.24.48.824 – June 2022
Enhanced drill through capabilities in dashboard

Min version upgrade to Update 10.0.24 PU 48

Bug / stability / UI fixes

Release 2.22.46.823 – June 2022
Fixed labels

Release 2.22.46.819 – June 2022
Webservices logs improvements

Maps compatibility

Release 2.22.46.816 – June 2022
Dashboard improvements

Vendor collaboration attachments fixes

Release 2.22.46.814 – June 2022
ABN lookup Performance improvements

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Webservices logs improvements

Main Menu performance optimisations

Release 2.22.46.811 – January 2022
Support for eftsure UAT environment

Support for ISV Studio

Release 2.22.46.807 – October 2021
Ambiguous portal button in Main menu split into onboardings and suppliers options

Release 2.22.46.805 – October 2021
Default dashboard: eftsure Workspace icons visible using user personalisation

Icon fixes using fonts rather than images as per standard, ribbon button deleted replaced by new menu

Icons: Verification icon split into Vendor Blocked icon and Verification icon

User Accessibility: Ability to set custom colours in user options

New Image editor tool for screenshots and support attachments

Ribbon button upgrade

Release 2.22.46.800 – October 2021
Vendor collaboration mandatory uploads now displaying red mandatory borders

Fixed: Missing AccountNum in Bank account copy to another legal entity

New One Menu redesign with improved separators

Release 2.22.46.799 – September 2021
Bank account verifications: Invoice details preset from caller invoice if available (Including ExFlow)

Eftsure UI Buttons available on invoice forms

Dialog redesign for self certification, expiration, payment limit, bank account verifications

Menu Actions now allows bank account UnSelfCertify and UnExpire

ExFlow & eftsure source code available via model file in LCS solution

Release 2.20.44.794 – September 2021
Bank account verifications:

> Ability to send contact first name, last name,

> Ability to send contact mobile and landline with validation

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Ability to send invoice information to assist with verification.

Release 2.20.44.793 – September 2021

Fix for VC change requests & dedicated configuration

Moved "Required onboarding updates" to Collaboration tab

New VC Request email tenant check

New Icons, lookups and displays on VC Screens

New VC bank account tab HTML, configured in Parameters>Vendor Collaboration

New ABN Tab in VC\My company information

New Bank account edit popup on VC\ My company information\eftsure

New default change requests forms on top of default invite forms

Need to reconfigure Forms for Parameters>Vendor Groups>Forms and Parameters>Invitations>Forms

New hold configuration to suit more cases

Need to reconfigure Hold for Parameters>Vendor Groups>Hold

Release 2.20.44.790 – August 2021

Eftsure entities now available in entity store for DMF

Support: High priority verification now available if Vendor is blocked.

Permissions: eftsure admin has now Full Access to PESOnboardingInfo for manual edits

Release 2.20.44.787 – July 2021

Onboarding field attachments expiration date can be manually edited by admin

Improved ABN Lookup exceptions to avoid infologs

Release 2.20.44.777 – June 2021

ABN & GST icons in **vendor invoice journals**

Icons support for **Factboxes**

Support for ABN lookups and Customer&Vendor **field approval labels**

Changed recurrence rule for **'Sync from eftsure' batch** from 1min to 30 min.

Improved **connection tests** to highlight invalid origId, locked accounts, missing API permission or invalid partnerId

ABN Details drop down dialog improvements on ABNs list form

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Release 2.20.44.747 – June 2021

Changes for **ExFlow** extension

Release 2.19.43.710 – May 2021

Vendor collaboration setup for HTML texts improved with HTML editors and previewers

Release 2.19.43.708 – May 2021

Vendor Group configuration

>   Setup moved from **Vendor Groups** into new **eftsure Parameters** tab

>   New **Hold options** on Sync from eftsure: Green/Orange/Red

Menu display and security improvements

Mapping for onboarding info: **Small Business**

Release 2.19.43.707 – May 2021

Support emails to use user's **sender email** instead of **user alias**

Release 2.19.43.700 – May 2021

ABN icons in **field & lookup** enhancements

New **ACN field** on Payee, populated from ABR information

ABN Lookup filter as you type

Release 2.19.43.694 – May 2021

New **verifier section** (Name, Phone, Position) on bank accounts

Reorganised eftsure fields on bank accounts

Release 2.19.43.693 – May 2021

Fixes for **webservice logs** display

Release 2.19.43.692 – May 2021

Extended webservices logs to capture HTTP traffic stack for troubleshooting

24hr **caching** for single ABN details lookup

Release 2.19.43.691 – May 2021

Support for International verifications (beta)

Vendor Collaboration improvements:

>   BSB Lookup from AusPayNet

>   Format Validation for IBAN, SWIFT, Email, Phone numbers

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Release 2.19.43.690 – May 2021

Telemetry Solution ID for **ISV Studio**

UI Update for Services health, Type format checker, Bank account verifications

New Maps & Geocoding provider: **Mapbox**

New IP Reputation provider: **BigDataCloud**

Email validation : IPQS & BigDataCloud in Parameters > Contact information > Email validation providers

Release 2.19.43.689 – May 2021

Support for **new wizard pages** features in navigation pane

Vendor group configuration:

   Ability to show in Workspace & Vendor form > New menu

   Ability to exclude suppliers from eftsure verifications during creation

Adding OnboardingField.Value **edit permission** to eftsure administrator for manual change of custom fields

Release 2.19.43.686 – May 2021

Support for **extended infolog messages** after PU34

Release 2.18.42.684 – April 2021

Self – certification improvements & bug fixes

Support tool improvements to **highlight mandatory** fields

Release 2.18.42.675 – April 2021

Support:

   New emails config (customersupport@eftsure.com.au and urgentverifications@eftsure.com.au)

   New High Priority description fields

Updated Projects methodology

Release 2.16.40.649 – February 2021

Services health tests all connexions **asynchronously**

Telemetry performance improvements and new parameters tab

Projects methodology improvements

New **VATNum** placeholder for VCLinks

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Release 2.16.40.642 – February 2021
Project export (HTML) and Project import (DMF)

Release 2.16.40.628 – February 2021
ABN Fixes on Vendors

Release 2.16.40.624 – February 2021
Added **SFTP** for AU Bank group updates from AusPayNet

Chart Colors button in toolbars

Project export (Project, DMF, Excel)

Recommendation: Delete all projects and project staging data before importing

Release 2.16.40.586 – January 2021
Check batches regenerates all necessary batches and alerts on deviations

Recommendation: Run Check batches manually after each deployment in each environment.

Release 2.16.40.585 – January 2021
Asynchronous validation for payments validation to improve performance

Release 2.16.40.573 – December 2020
Tasks moved into Dashboard & Admin sections of workspace

UI Icons in eftsure tabs (bank accounts & payment lines & user options)

Onboarding forms moved into eftsure Parameters form

GFense preset icons (Buildings and Flags)

Bing Maps upgrades to match Google Maps features

Clusters for Maps marker and pins

User options for map type preferences (Roads/Satellite)

Release 2.16.40.563 – December 2020
Vendor default bank account lookup redesigned to include icons and grid colours

New task: Unexpected default bank account

ABN Url bug fix

Release 2.16.40.561 – December 2020
Bug fixes and improvements

Projects export into **Microsoft Project** compatible format

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Show durations moved from Parameters to User options

Self-Certify & **Limit Payment** dialogs redesign

New **Payment limit** icon in form titles

Update for **standard icons** on all custom forms

Vendor group configuration form redesign

eftsure **ribbon button** shows connection details and geo location details

Payment journal icons now also list ABN and GST statuses, new icons for blocked and above limit

Release 2.14.38.530 – November 2020
Onboarding values screen **redesign**, new **attachments** sections

Release 2.14.38.527 – November 2020
New icon improvements with tooltips

New BankGroup lookup improvements

Vendor History available in Workspace and Show menu

Ability to **edit values** of custom onboarding fields (not validated by eftsure) – Maintain permission required

eftsure icons available in workspace **form parts** and **dialogs**

Batch source icons

Onboarding fields **expiry date** (for attachments in eftsure onboarding forms)

Menu Verifications & Show renamed into **Actions** and **Show** menus

Onboarding status change **button now merged into Actions** menu

Release 2.14.38.498 – October 2020
New default **first name and last name** (Parameters) for invites and change requests.

Bank account **id prefixes** in parameters > Naming conventions

Updated onboarding values form to **dialog**

Release 2.14.38.476 – September 2020
Tooltips for eftsure **icon block** in main screens

Accepting Awaiting onboardings requires manual confirmation

New Dashboard > **Project** and Dashboard > Tasks parts

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New **Mass rename** in Tasks > Rename part

New **Search logs** in Task > Search part

New Projects > **Upgrade methodology**

Release 2.14.38.465 – September 2020

Journal **GST Checks** (Journal name & Vendor group configuration)

Vendor Invoice **GST Checks** (Vendor group configuration)

New vendor **blocked icon**

New payment transaction dimension **popup icon**

New manuals available in Help menu

New eftsure **support role**

Release 2.14.38.455 – September 2020

Important:

Please reschedule Onboarding Sync batch job to run every hour

Need to configure email types for vendor and contacts in eftsure parameters

Need to reconfigure environment (sandbox/live combobox)

Beta preview - **Project** module for eftsure deployment methodologies - Removed Tasks v1.0

New **Process flows** in Workspace and Parameters

Support for **deployable packages**

New **verification workspace** section

New **contact type** selection in Parameters to use standard or eftsure contact types

Release 2.13.37.429 – August 2020

Support

New support dialog for issues, verifications, training, customisations

New Screenshot control to attach screenshot

Support for Zip, Infolog, environment configuration

Configuration in parameters

Supplier Invitation

Ability to specify ABN on invitations

New ABN lookup for Name and Number

Onboardings

New delete button for admins in case of issues – resync recommended after

New parameter to delete attachments from eftsure cloud after download

Tasks v1.0:

List of go live tasks.

Verbose Log:

Types and UI improvements

API Update:

Removing deprecated eftsure APIs (OnboardSuppliers, GetVerificationInfo),

All Vendors go through Update and GetSupplierInfo from this release on.

Removed inconsistent Skip flag, renamed skip to **Exclude vendor from eftsure**

Vendor Collaboration

HTML Email link to VC users & Snippets

New VC company specific configuration

New Collaboration tab in main workspace

Prospective vendor registration request: New record creator form

Vendor request configuration attachments: New Tree control lookup (Grid deprecated)

VMF

Option to include latest transaction date and amount to facilitate verifications

UI

Ribbon Button Admin HelpText

Chart colors matching UI definition

Buttons framework

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Show/Hide buttons, HelpText descriptions & Multi Select performance improvements in UI Parameters.

New Sync Group to sync selected vendor(s) up or down, New Vendor Collaboration Link button

Buttons added to all missing more forms.

Admin

Telemetry core: Microsoft ApplicationInsights & Google Analytics (Turned on by default)

Batch History Infolog UI Improvements

Security

eftsure admin role has been granted SysTracingPane privilege by code, please remove manually in System > Security > Security Configuration if not appropriate.

Vendor Group configuration: Ability to restrict self-certification to user groups

Workspace: Deleted obsolete search by supplier code feature

Release 2.10.34.103 – April 2019
Tools

Vendor latest transactions in Init Menu and in VMF files

Release 2.10.34.99 – April 2019
Batches

Batch scheduler

Stability improvements on incorrect data (ABN, BSB, error messages)

Inactive eftsure flag now solely based on bank account expiration date

Batch job edit parameters popup issue

Eftsure icon in contact information

Release 2.10.34.98 – April 2019
Supplier code

New numbering for improved visibility

GoLive & Maintenance

Reset company feature for admins

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UI

> Improved Show & Verification buttons

Release 2.10.34.92 – April 2019

Automation

> New Vendor Group config settings to automate vendor accept and update
>
> New Vendor Group options to block vendors on business events

Forms

> Simplified verifications, new form properties synced and handle employee specific forms

Fixes

> Show Contact person from bank account fixed
>
> Documentation updates

General

> UI Improvements on additional alerts, counts in payments screen
>
> Onboarding fields badges and logs

Release 2.10.34.90 – April 2019

Vendor collaboration:

> HTML improvements, Accept Terms & Conditions

General

> Multi select improvements
>
> New vendor group configuration options
>
> New icons and UI upgrades, new shortcuts

Release 2.10.34.82 – March 2019

Vendor collaboration:

> Completed missing documentation
>
> Support for custom attachments
>
> Copy configuration in Vendor requests configuration function now supported
>
> Bank Account Information now optional / mandatory / hidden

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New menus in Workspace menus for VC

New Vendor Group configuration options for VC, Vendor on Hold status

Google Maps – (New Custom control when #pins >1, New Drop Down for terrain types)

Onboarding forms - Aligning forms to match portal updates (2FA, verifications)

Parameters

YourAccountNum supports Empty, LegalEntityName, VendorAccount during creation

Release 2.8.32.70 – March 2019

Bug fixes

New support for Google Maps and Bing Maps

New third party IPQS for Geo Fencing

New Webservices logs

New custom controls

Fixed Charts drill down

New 2FA field on forms

Updated documentation

Release 2.8.32.27 – February 2019

Bug fixes

New administration module

New charts

New GeoFencing feature

New Vendor collaboration support

New ABR API connection for ABN checks, search...

Updated documentation

Release 2.8.32.1

Upgrade from Microsoft Dynamics AX 2012

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