

# Upgrade PESChanges

## White Paper

Eftsure inside Microsoft Dynamics 365 for F&O

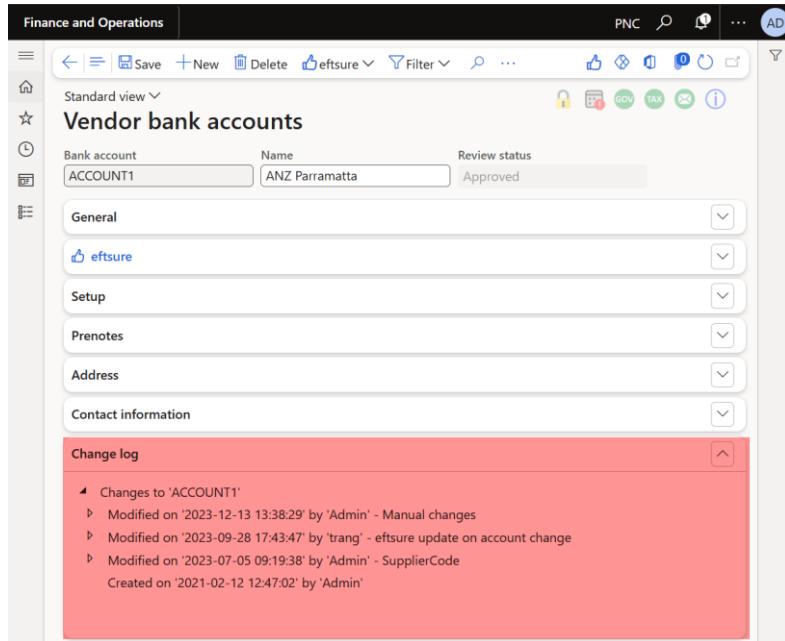
**eftsure**

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## Introduction

This document describes the data migration process for the deprecated PESChanges features, which used to display a changes log in your vendor bank account forms:



To see vendor / bank account changes, please use our vendor history log, configurable in Parameters, available in all eftsure menus, and as a data entity for audit purposes.

These features will be deprecated in v1535.

**Note:** Please ensure your end users have access to vendor history if needed

## Upgrade Error

During the standard upgrade, a new batch will be spawned and fail until PESChanges upgrade completes successfully:

		Filter	Version	Status	Recurrence	Batch jobs			
		Status	Job description	Run by	Scheduled start date/time				
		Error	Upgrade 1534 => 2000	Admin	24/07/2025 12:34:02 PM				

The batch will fail with the following error, alerting the key user to perform the update:

VersionUpdate 1534 VendBankAccounts PESChanges > For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges [Open](#)

VersionUpdate 1535 VendBankAccounts PESChanges > Before retrying, please run Upgrade PESChanges upgrade in [PDS, PNC, PNS, PNT, PUK] [Upgrade PESChanges](#)

VersionUpdate 1535 VendBankAccounts PESChanges > Duration 00:00:01

Batch task failed: VersionUpdate 1535 VendBankAccounts PESChanges > Before retrying, please run Upgrade PESChanges upgrade in [PDS, PNC, PNS, PNT, PUK]

A **Upgrade PESChanges** button is available to help alongside the warning description. Click **Upgrade PESChanges** to get to the matching data upgrade batch.

Once the upgrade has completed, the version update script will be cleared of all warnings and actions.

Our out of the box upgrade framework is used for all upgrades including this process. It will generate batches in the **eftsure upgrade** monitoring category that can be monitored directly in Workspace > Admin > Upgrades > Batches (and Details).

The upgrade is considered successful once all upgrade tasks have completed successfully.

If an error can't be resolved:

Check with key user,

Try to manually edit the bank account causing issue before retrying

Select the failing batch and hit the support icon as per the image below:

Finance and Operations eftsure

My view (5) 1 257 60

Charts Dashboard Onboardings Verifications Vendors Registrations Collaboration Tools Admin Help

Active batch jobs 7 Failed batch jobs 630 Batch job history 7480 Logs 19

All batches 1

History Errors Tasks

All logs eftsure Government Code Support

Upgrades Batches

Details

Status	Job description	Act
<input checked="" type="checkbox"/> Error	Upgrade 1534 => 2000	25,
Ended	Upgrade PESChanges - PUK - P...	25,
Ended	Upgrade PESChanges - PNC	25,
Ended	Upgrade PESChanges - PNT	25,
Ended	Upgrade 1534 => 2000	25,

## Vendor History Log configuration

To perform the optional data migration of PESChanges into Vendor history log, we recommend enabling vendor history first:

Finance and Operations

Standard view ▾

### Parameters for eftsure

Onboarding

Payments

Vendor groups

Vendor copy

User interface

Batches

Logs

This section contains all the settings required to configure the logs.

**VENDOR HISTORY**

Vendor history logging  Yes

Record field changes details (aff...  Yes

Record code call stack  Yes

**WEB SERVICES**

Webservices log  Yes

Webservices call stack  Yes

Extended logs to be used sporadically with care, Recommended for live tracing under support supervision ONLY. Degrades performance due to size of data. Don't forget to turn off after use.

Other parameters are optional and recommended to be turned off.

If Vendor history log is turned off during the Upgrade, the deprecated data will be lost.

## Vendor History Log

When enabled, the vendor history log is available:

In eftsure workspace > Dashboard > Vendors > History to access data for all vendor changes.

In our eftsure menu for any specific vendor or bank account:

Finance and Operations

Standard view ▾

### Vendor bank account

Bank account: ACCOUNT1 Name: ANZ

General

**eftsure**

Setup

Prenotes

Address

Contact information

Change log

History Shows all recorded activity for this supplier

Changes to 'ACCOUNT1'

Modified on '2023-12-13 13:38:2' History

Modified on '2023-09-28 17:43:4' EFTSURE PORTAL

LOCAL ONLY

Invite existing vendor - Done

AVAILABLE IN EFTSURE

Request details

Verification - Expired

Urgent verification - No verification

ACTIONS

Email

Payment limit - Unlimited

Self-certification - Expired

Expire - Expired

Comment

SYNC

From eftsure

To eftsure

OPEN

## Data Upgrade

For environments with vendor history log running, the data should already be available in the vendor history log, no need for data migration, you can run the data migration job to clear data without migration of PESChanges data into Vendor History Log.

The screenshot shows the 'Vendor history' and 'PESChanges' sections of the configuration interface. In the 'Vendor history' section, the 'Migrate data from PESChanges' toggle is set to 'No'. In the 'PESChanges' section, the 'Clear PESChanges after upgrade' toggle is set to 'Yes'.

Section	Setting	Value
Vendor history	Migrate data from PESChanges	No
PESChanges	Clear PESChanges after upgrade	Yes

For environments without vendor history log configured, if you wish to use a similar process, we recommend migrating and clearing data.

First turn on Vendor history logging, then run the following:

The screenshot shows the 'Vendor history' and 'PESChanges' sections of the configuration interface. In the 'Vendor history' section, the 'Migrate data from PESChanges' toggle is set to 'Yes'. In the 'PESChanges' section, the 'Clear PESChanges after upgrade' toggle is set to 'Yes'.

Section	Setting	Value
Vendor history	Migrate data from PESChanges	Yes
PESChanges	Clear PESChanges after upgrade	Yes

## Parameters

The following parameters are available in the upgrade job:

The screenshot shows the 'Upgrade PESChanges - PNT' parameters configuration interface. It includes a summary box with instructions, a 'Parameters' section with 'Enable vendor history (default settings)' set to 'Yes' and 'Entities' set to 'All enabled companies', and sections for 'Vendor history' and 'PESChanges' with their respective migration and clearing toggles set to 'Yes'. There is also a 'Run in the background' section.

Parameter	Value
Enable vendor history (default settings)	Yes
Entities	All enabled companies
Migrate data from PESChanges	Yes
Clear PESChanges after upgrade	Yes
Run in the background	(dropdown menu)

### Enable vendor history:

Turn on Vendor History logs with default settings (Callstack disabled)

This option is only available if vendor history logs is disabled

#### **Entities:**

This batch needs to run once per enabled legal entity, once per data sharing policy (if cross company data sharing).

We recommend running each batches one after another to avoid performance issues, deadlock and conflicts. Using the Entities combobox, either schedule X batches with current entity or schedule 1 batch will all enabled entities.

#### **Migrate data from PESChanges:**

Use deprecated history from VendBankAccount.PESChanges to generate upgraded data compatible with vendor history log.

#### **Clear PESChanges after upgrade:**

Clear VendBankAccount.PESChanges after processing records. This action is irreversible.

## Monitoring progress

The new batch(es) for this upgrade will appear in Workspace > Admin > Upgrades > Batches.

Monitor all infolog messages and ensure each batch completes. Batches can fail due to deadlocks or conflicts and may require massaging.

Depending on the amount of data, this process can take a long time.

## Completing upgrade

Once all obsolete data has been cleared, you can now retry the upgrade batch which should complete successfully.

You can restart the failed batch using the status button to set batch status to Waiting.

Once the upgrade batch job for version 1535 has completed, you can proceed with the next upgrade task.

## Demonstration

The following sample run demonstrates how to run this process correctly. It starts after the configuration of cross company data sharing and enabling vendor history log.

This scenario has the following legal entities : [PNC](#), [PNT](#), [PUK](#), [PDS](#), [PNS](#), where [PUK](#), [PDS](#), [PNS](#) are shared via CCDS Policy 'Vendor Master Data'. The data fix should therefore run in [PNC](#), [PNT](#) and in one of [PUK](#), [PDS](#), [PNS](#)

For all runs, we'll be running with all default options enabled.

First, the standard upgrade fails and provides a link to run the upgrade in each legal entity:

<input type="button" value="Filter"/> <input type="button" value="Clean"/> <input type="button" value="Tasks"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Left"/> <input type="button" value="Right"/>					
Status	Job description	Actual start date/time	End date/time	Company	...
Error	Upgrade 1534 => 2000	25/07/2025 12:34:04 PM	25/07/2025 12:34:22 PM	PUK	A

VersionUpdate 1535 VendBankAccounts PESChanges > For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges [Open](#)

VersionUpdate 1535 VendBankAccounts PESChanges > Before retrying, please run Upgrade PESChanges upgrade in [PDS, PNC, PNS, PNT, PUK] [Show](#)

VersionUpdate 1535 VendBankAccounts PESChanges > Duration 00:00:01

Batch task failed: VersionUpdate 1535 VendBankAccounts PESChanges > Before retrying, please run Upgrade PESChanges upgrade in [PDS, PNC, PNS, PNT, PUK]

## Per entity

We run the upgrade in all entities, one after another:

In PUK:

Status	Job description	Actual start date/time	End date/time	Company	Cre :
Ended	Upgrade PESChanges - PUK - P...	25/07/2025 12:35:10 PM	25/07/2025 12:35:22 PM	PUK	Admi

Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges [Open](#)

Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > Vendor history enabled with default settings [Show](#)

Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > 714 vendor history record(s) created

Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > Cleared PESChanges from 96 record(s)

Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > Processed through 99 record(s)

Upgrade PESChanges - PUK - Policy 'Vendor Master Data' > PESChanges upgrade already completed in PUK. Remaining entities to clear: PNC, PNT [Show](#)

In PNC:

Status	Job description	Actual start date/time	End date/time	Company	Cre :
Ended	Upgrade PESChanges - PNC	25/07/2025 12:35:53 PM	25/07/2025 12:37:11 PM	PNC	Admi

Upgrade PESChanges - PNC > For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges [Open](#)

Upgrade PESChanges - PNC > 16465 vendor history record(s) created [Show](#)

Upgrade PESChanges - PNC > Cleared PESChanges from 948 record(s)

Upgrade PESChanges - PNC > Processed through 948 record(s)

Upgrade PESChanges - PNC > PESChanges upgrade already completed in PNC. Remaining entities to clear: PNT [Show](#)

In PNT:

Status	Job description	Actual start date/time	End date/time	Company	Created by
Ended	Upgrade PESChanges - PNT	25/07/2025 12:35:32 PM	25/07/2025 12:40:25 PM	PNT	Admin

<a href="#">Upgrade PESChanges - PNT</a> > For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges	<a href="#">Open</a>
Upgrade PESChanges - PNT > Vendor history enabled with default settings	<a href="#">Show</a>
Upgrade PESChanges - PNT > 37271 vendor history record(s) created	
Upgrade PESChanges - PNT > Cleared PESChanges from 296 record(s)	
Upgrade PESChanges - PNT > Processed through 297 record(s)	
Upgrade PESChanges - PNT > PESChanges upgrade already completed in PNT. Remaining entities to clear: None	

Once all upgrades have completed, the last batch confirms all enabled legal entities have been processed successfully.

Return to the failed upgrade batch, change status back to Waiting:

The screenshot shows the 'Batch jobs' list in the Microsoft Dynamics 365 interface. A green arrow points from the 'Status' column to a 'Select new status' dialog box. The dialog box shows 'Waiting' as the selected status, with 'Withhold' and ' Cancelling' as other options. The 'OK' button is highlighted with a green arrow.

After completion, a second batch job history completes successfully and confirms all upgrades have completed successfully.

Status	Job description	Actual start date/time	End date/time	Company	Created by	Batch job ID
Error	Upgrade 1534 => 2000	25/07/2025 12:34:04 PM	25/07/2025 12:34:22 PM	PUK	Admin	68723895020
Ended	Upgrade PESChanges - PUK - P...	25/07/2025 12:35:10 PM	25/07/2025 12:35:22 PM	PUK	Admin	68723895021
Ended	Upgrade PESChanges - PNC	25/07/2025 12:35:53 PM	25/07/2025 12:37:11 PM	PNC	Admin	68723895023
Ended	Upgrade PESChanges - PNT	25/07/2025 12:35:32 PM	25/07/2025 12:40:25 PM	PNT	Admin	68723895022
<input checked="" type="checkbox"/> Ended	Upgrade 1534 => 2000	25/07/2025 1:01:56 PM	25/07/2025 1:02:11 PM	PUK	Admin	68723895020

VersionUpdate 1535 VendBankAccounts PESChanges > For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges

VersionUpdate 1535 VendBankAccounts PESChanges > PESChanges upgrade already completed in All entities. Remaining entities to clear: None

VersionUpdate 1535 VendBankAccounts PESChanges > Reset changeset number > Before: 1534

VersionUpdate 1535 VendBankAccounts PESChanges > Reset changeset number > After: 1535

VersionUpdate 1535 VendBankAccounts PESChanges > Duration 00:00:00

Upgrade > Delete Project definition groups > 0 definition group(s) deleted

Upgrade > Delete Project definition groups > 0 definition group(s) deleted

Upgrade > Cross company data sharing > Recommending Table share Vendor Master Data for Vendor history - instead of None

Upgrade > Cross company data sharing > Recommending Table share Vendor Master Data for Vendor history - instead of None

For all enabled entities:

In this second example, we'll run all enabled legal entities at once, which will take longer if more than one entity is concerned.

Status	Job description	Actual start date/time	End date/time	Company	Created by	Batch job ID	⋮
Ended	Upgrade PESChanges - PNT	31/07/2025 10:25:29 PM	31/07/2025 10:26:51 PM	PNT	Admin	68723895770	

Upgrade PESChanges - PNT >	For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges	🔗 Open
Upgrade PESChanges - PNT >	Running for All enabled companies	
Upgrade PESChanges - PNT > PDS >	746 vendor history record(s) created	
Upgrade PESChanges - PNT > PDS >	Cleared PESChanges from 96 record(s)	
Upgrade PESChanges - PNT > PDS >	Processed through 99 record(s)	
Upgrade PESChanges - PNT > PDS >	PESChanges upgrade already completed in PDS. Remaining entities to clear: PNC, PNT	
Upgrade PESChanges - PNT > PNC >	16569 vendor history record(s) created	
Upgrade PESChanges - PNT > PNC >	Cleared PESChanges from 948 record(s)	
Upgrade PESChanges - PNT > PNC >	Processed through 948 record(s)	
Upgrade PESChanges - PNT > PNC >	PESChanges upgrade already completed in PNC. Remaining entities to clear: PNT	
Upgrade PESChanges - PNT > PNT >	37469 vendor history record(s) created	
Upgrade PESChanges - PNT > PNT >	Cleared PESChanges from 296 record(s)	
Upgrade PESChanges - PNT > PNT >	Processed through 297 record(s)	
Upgrade PESChanges - PNT > PNT >	PESChanges upgrade already completed in PNT. Remaining entities to clear: None	

This job will run all enabled legal entities and confirm completion.

Return to the failed upgrade batch, change status back to Waiting:

The screenshot shows the 'All batches' list in the eftsure application. The 'Status' column is highlighted with a green arrow. A dropdown menu titled 'Select new status' is open, showing 'Withhold', ' Cancelling', and 'Waiting'. The 'Waiting' option is highlighted with a blue selection bar. A green arrow points from the 'Waiting' option to the 'OK' button at the bottom right of the dropdown.

After completion, a second batch job history completes successfully and confirms all upgrades have completed successfully.

Status	Job description	Actual start date/time	End date/time	Company	Created by	Batch job ID	⋮
Error	Upgrade 1535 => 2000	31/07/2025 10:22:57 PM	31/07/2025 10:24:49 PM	PNT	Admin	68723894270	
Ended	Upgrade PESChanges - PNT	31/07/2025 10:25:29 PM	31/07/2025 10:26:51 PM	PNT	Admin	68723895770	
Ended	Upgrade 1535 => 2000	31/07/2025 10:56:41 PM	31/07/2025 10:57:05 PM	PNT	Admin	68723894270	

Upgrade > Delete Project definition groups >	0 definition group(s) deleted
Upgrade > Delete Project definition groups >	0 definition group(s) deleted
Upgrade > CCDS RecreatePolicies > Cross company data sharing >	Checked 5 Entity(ies)
1541 PESChanges >	Version 1541 (20/07/2025) - Deprecated PESChanges - Upgrade strategy for moving PESChanges into Vendor history log.
1541 PESChanges >	For more information, please refer to our Upgrade guide for VendBankAccount.PESChanges
1541 PESChanges >	PESChanges upgrade already completed in All entities. Remaining entities to clear: None
1541 PESChanges >	Changeset number: 1535 -> 1541
1546 RemoveIncorrectStatuses >	Version 1546 (26/07/2025) - Incorrect Parameters Statuses - Remove incorrect statuses from PESParameters fields. Some residual numbers remaining from previous version
1546 RemoveIncorrectStatuses >	Changeset number: 1541 -> 1546
Final 2000 >	Changeset number: 1546 -> 2000