Upgrade V4 to V5

This document lists the steps required to upgrade eftsure inside D365 FO successfully from V4 to V5.

The key user must run and understand these steps in sandbox before moving to live. Steps will require coordination with eftsure support services.

Understanding these steps and their durations is critical to a successful upgrade in the live environment.

Please see our generic upgrade guide to assist during the upgrade.

For more information on the new/deprecated features, please see our release notes.

If you need assistance during this upgrade, please see your key user or consultants. Alternatively you can also request assistance from eftsure D365 Professional Services who are available to answer any questions and assist during deployments.

Important

Only new customers and preselected existing customers may upgrade to v5.

If you are **not sure** whether your organization has been elected for v5, **stay on v4** and confirm with support before V5 deployment (we're still testing data migration path for existing customers and moving to V5 too early might result in unexpected/unsupported consequences).

Description

V5 introduces **breaking changes** that require manual configuration before the system can resume daily activities:

New GovCode table needs to be automatically migrated from existing data (no sharing involved)

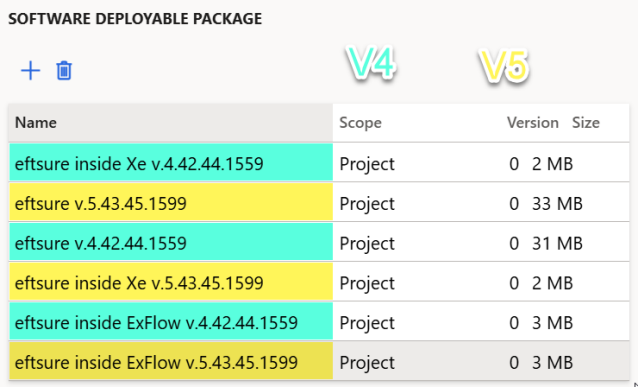
API **v1** with **Basic Auth** is no longer in use, API **v2** with **OAuth tokens** need manual setup in each new environment.

Note: API v2 needs to be enabled per environment by eftsure API Services.

Note: Coordination with eftsure API Services is key for a successful upgrade to Live, please notify our services early before applying in live.

Upgrade

V5 packages are available in LCS alongside V4:



Perform standard code upgrade from V4 to V5, see deployment guide for more details.

Pause all eftsure batches (they won't work until API v2 is configured successfully)

Cross company data sharing

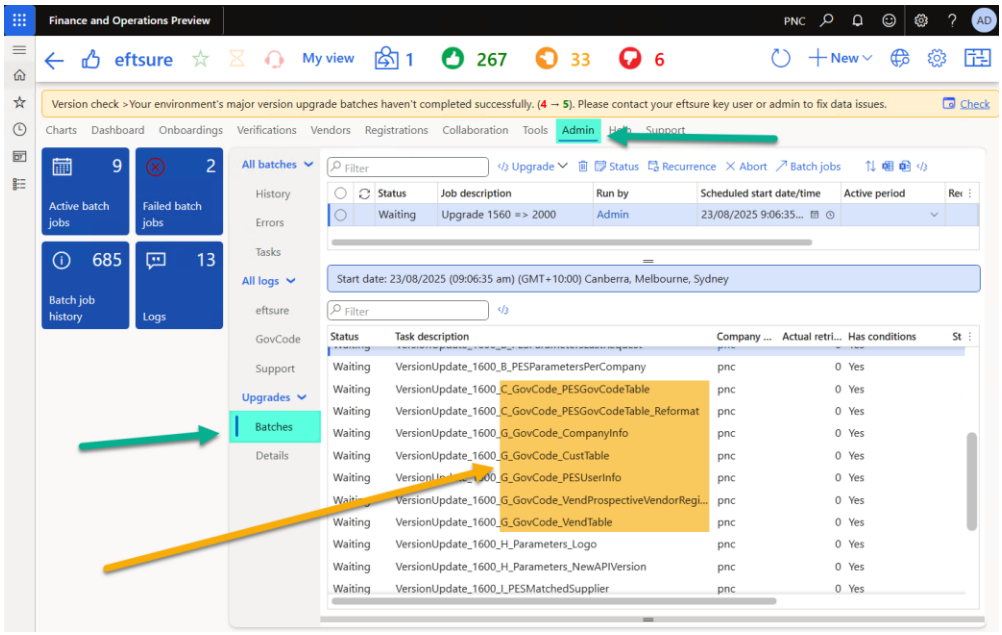
If your organization uses **Cross Company Data Sharing**, please review either upgrade batch log or CCDS policies to add new table/fields as per CCDS recommendations.

Important: There are **new fields in this release** and it's critical to **share them** alongside the rest of your configuration. These will raise a **configuration warning** in the **upgrade batch log** and during **configuration checks**.

For more information, please check our CCDS White paper.

Upgrade batches

Monitor **upgrade batches** as per normal upgrades, pay attention to all new **GovCode** upgrade scripts and ensure completion without errors.

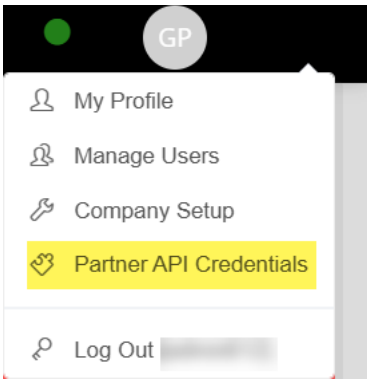


Depending on the volume of suppliers and the number of companies configured in cross company data sharing, these tasks may take some time, and you may need to plan the appropriate downtime during a weekend.

Note: The performance of your **sandbox** environment is not necessarily related to the performance of your **live** environment and batch durations may be impacted.

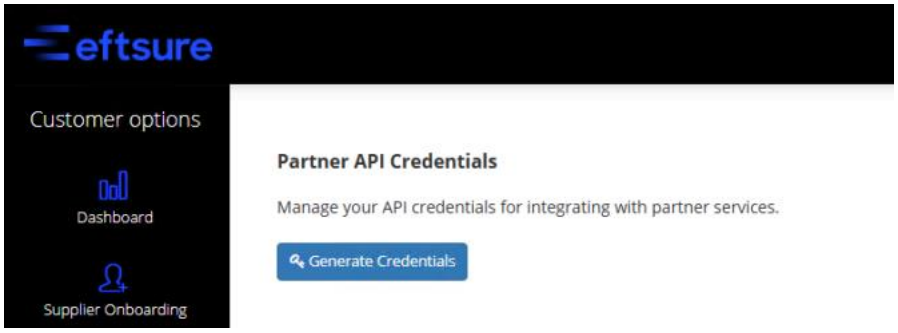
Creating Client ID and Secret from Customer Portal

To create a client ID and secret, login to the customer portal, and click on the menu on the top right.



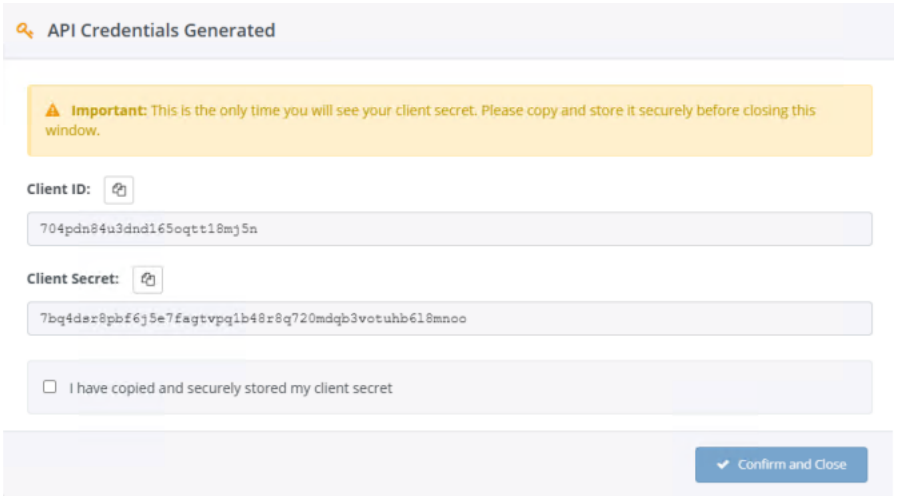
Click on the **Partner API Credentials** menu item.

This will bring up the Partner API Credentials page:



Click on the **Generate Credentials** button.

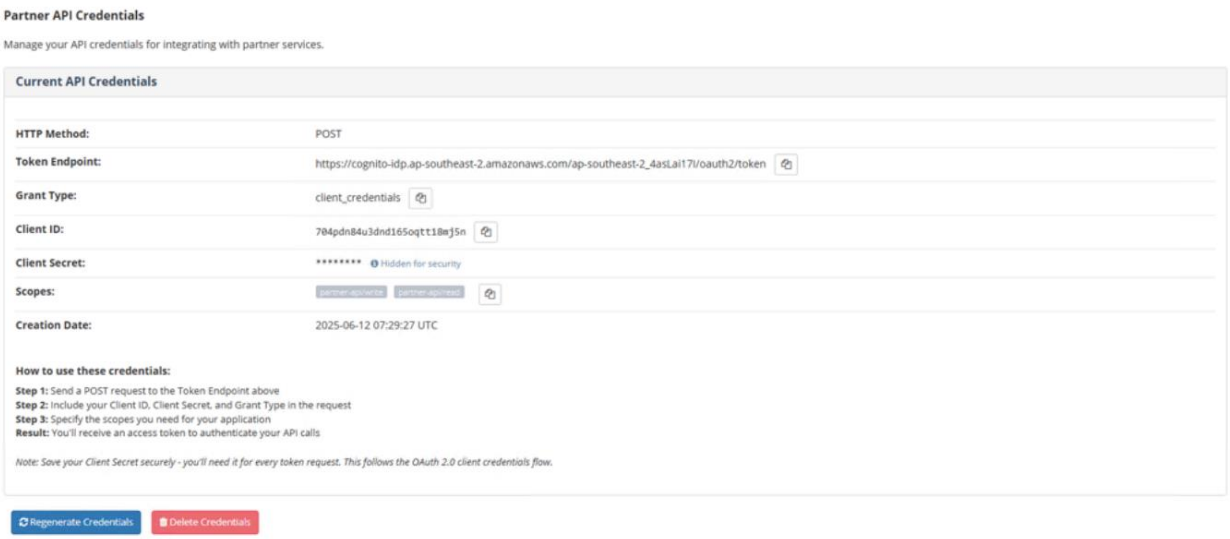
It will then open a new for **API Credentials Generated**:



Click on the buttons to copy the text to clipboard

Check the checkbox when you've copied and securely store the client secret. It will only be displayed once.

Finally, click on the **Confirm and Close** button. It will then display information about the app client credentials created:



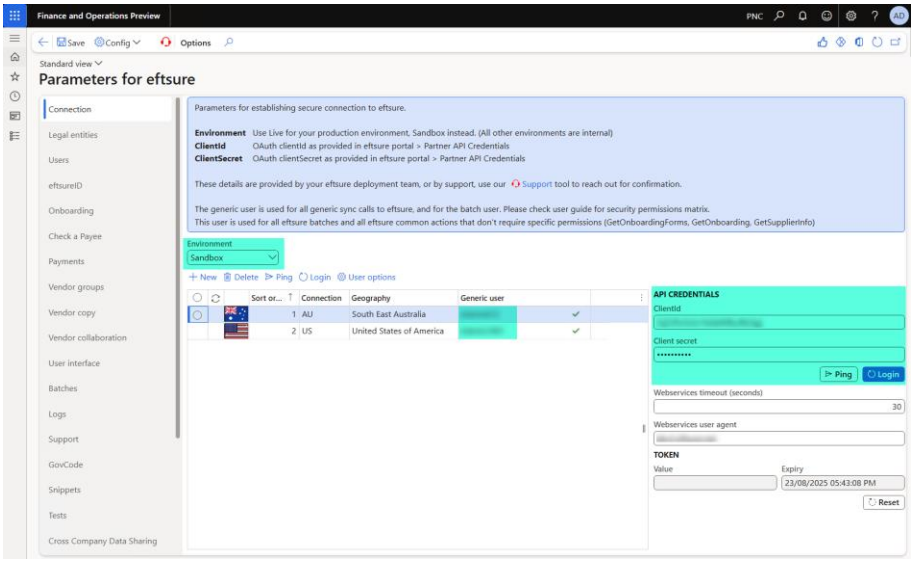
Setup connections

Go back to Dynamics 365, head to **eftsure parameters** and configure/check your connection(s).

If previously using **API v1** (Basic Auth), create support ticket to move your sandbox/live environment to **API v2** (Token Auth).

Get eftsure API **client Id** and **client Secret** from eftsure portal (previous step).

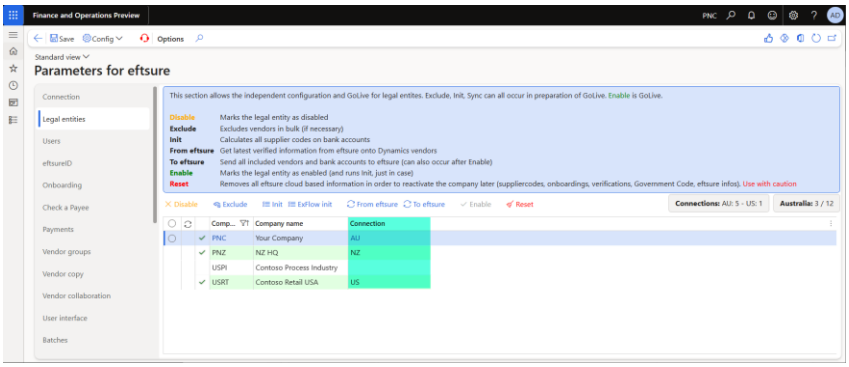
Configure **client Id** and **secret** into the appropriate **connection**.



Use the **Ping** and **Login** buttons to validate your connection.

Legal entities

Go to **eftsure parameters** and ensure your legal entities are connected to the appropriate connection.



Note: You may need to disable the legal entity and re-enable it afterwards to change the connection, which is totally fine during the downtime period.

Setup users

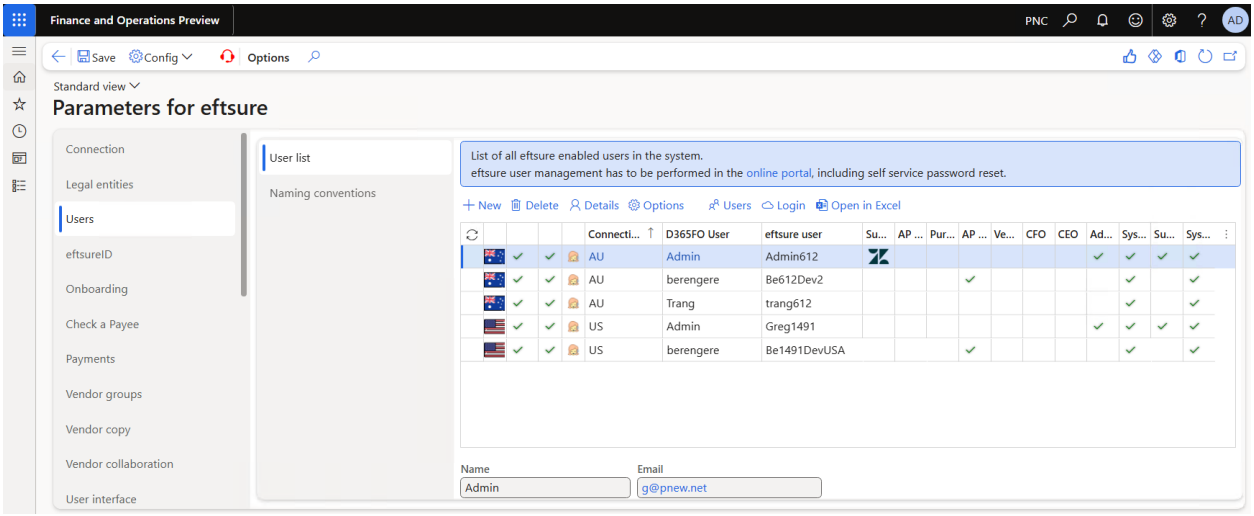
User setup is now the responsibility of the key/admin user, which needs to configure 2 types of users:

Generic API user, used for generic actions, configurable at the connection level.

End users, used for personal actions, configurable in the **eftsure parameters > Users > User list** where each user needs to be configured per connection,

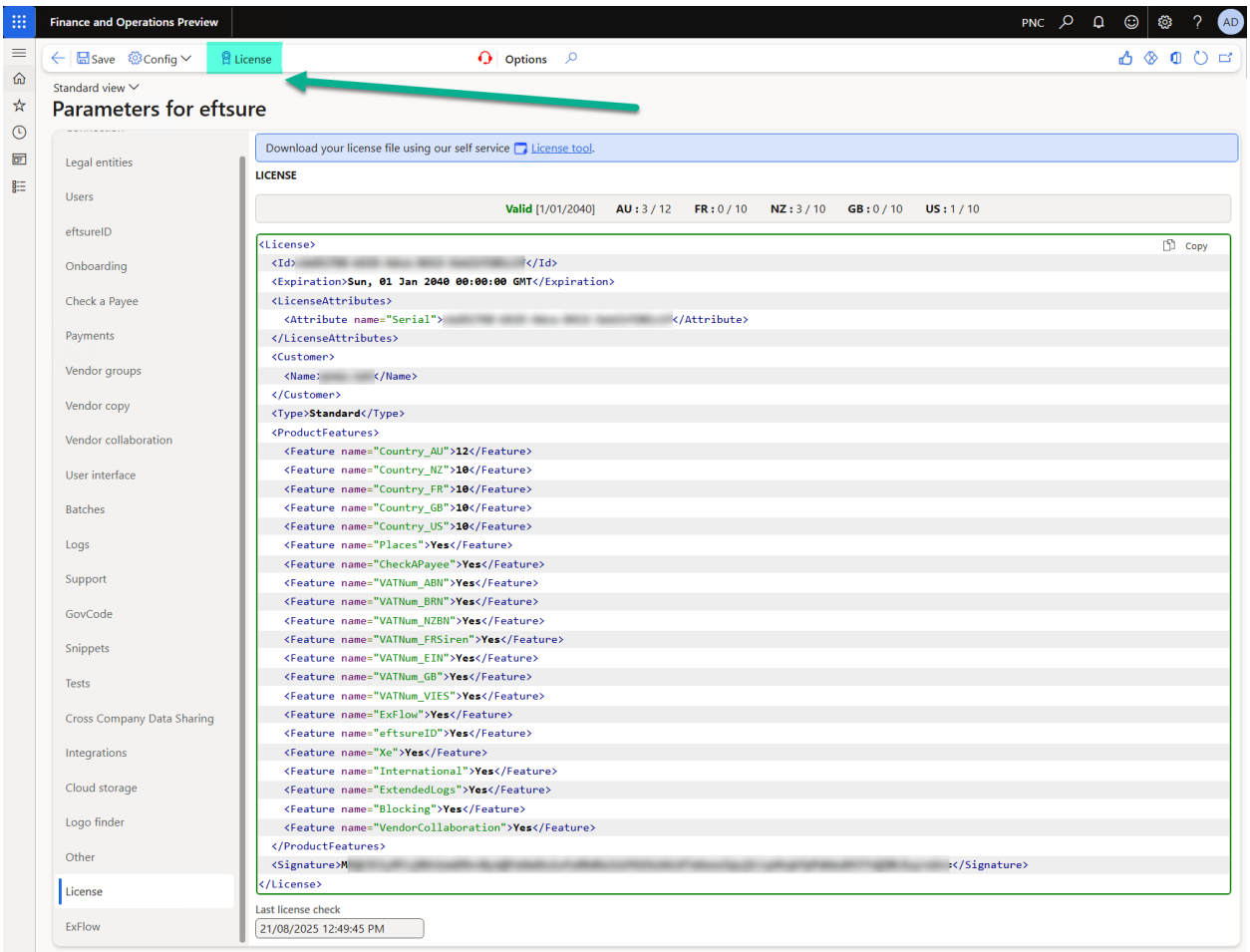
Each eftsure user is now configured by the admin in the eftsure parameters screen **rather than** by each individual user (V4). **User passwords are no longer necessary**, which **greatly simplifies future upgrades** as user management was one of the key friction issue for all stakeholders.

User **names** and **settings** should have been upgraded during upgrade scripts, please confirm your user configuration:



License

Refresh your **license** to the latest in **eftsure parameters**.



Unlicensed items will now be disabled rather than hidden.

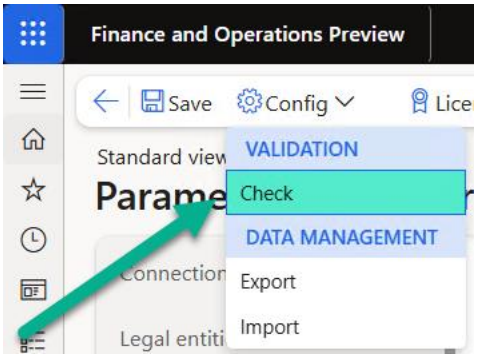
Configuration

Check opt-in / out new features using our Release Notes.

Some features may have their own supporting documentation.

For **Comfort Pack** licensed organizations and charities, see our API Keys guide to register for new GovCode services. This new release contains lookups and validations for EU, FR, HK, NZ, SG, UK, US.

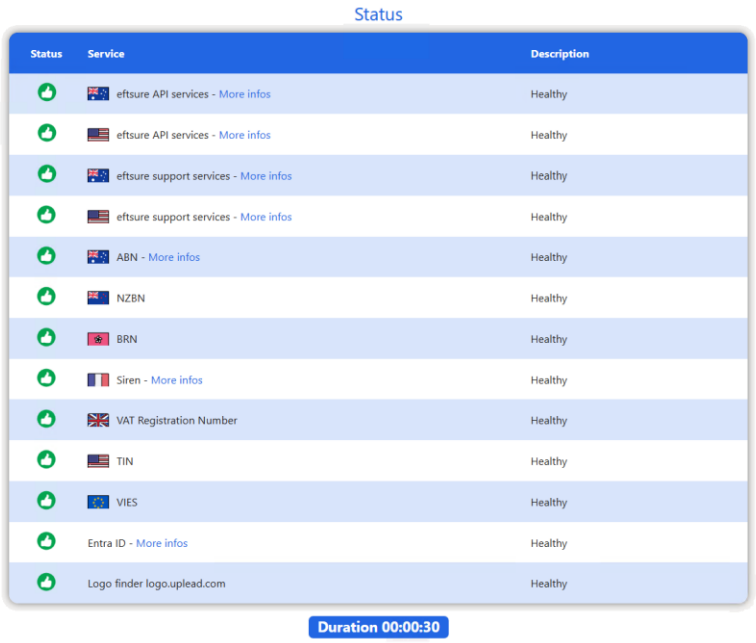
Run a **configuration check** in eftsure parameters and ensure all configuration issues are resolved.



Check batches to recreate/regenerate batches: This step is required to remove deprecated batches and create potential new batches depending on your configuration.

Status

Open the dashboard in **eftsure workspace > Dashboard > Status** and ensure all webservices are performing nominally, check / fix any errors.



Testing

Follow our recommended test scripts available in **eftsure workspace > Help > Testing**.

Each test contains a **video recording** and a **task guide** to replay the test in person, in the matching environment, at any moment.

End

Resume paused batches if any.

Monitor eftsure batches for errors and assist users in change management.

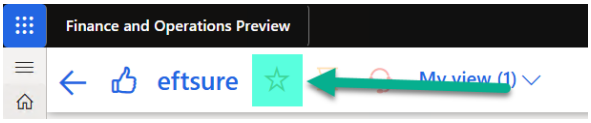
Live

Repeat the same process in Live environment, allowing time to our API services to perform the switch from **API v1** to **v2** at the appropriate time.

Congratulations, you've been through our V4 to V5 upgrade.

Feedback

Hit the feedback button if you have comments or see potential for continuous improvements.


Finance and Operations Preview
eftsure
My view (1)