



eftsure ID

Eftsure inside Microsoft Dynamics 365 for F&O

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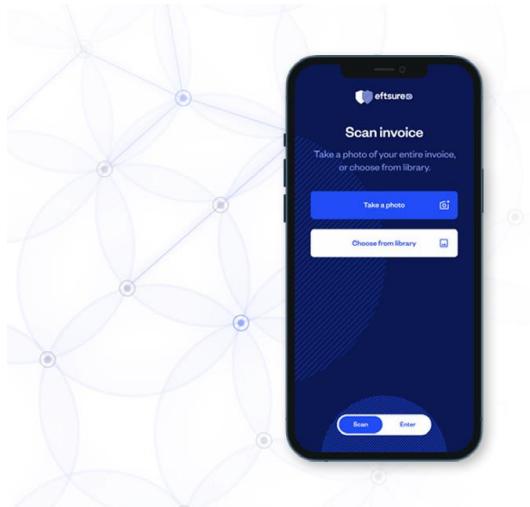
What is EftsureID?

A product of Eftsure Pty Ltd, EftsureID [<https://id.eftsure.com.au/>] is an invoice authentication tool that verifies that the bank details on the invoice belong to the right business, are accurate and haven't been changed by fraudsters.

Before paying the invoice, we recommend checking the unique EftsureID that can be found on the invoice to verify the bank information.

EftsureID is free to use for your customers, and you can access it from the comfort of your desktop or mobile app.

You can quickly verify that all bank account details, BSB, ABN, and business name on the invoice matches and whether it is safe to pay the invoice.



Download the app to scan invoices

Mobile Apps for iOS & Android:

EftsureID is available for download from the App Store and Google Play



For more information, please check <https://helpdesk.eftsure.com.au/hc/en-au/articles/19439334874643-EftsureID-Web-Application> and <https://helpdesk.eftsure.com.au/hc/en-au/articles/24743917350291-EftsureID-Communication-Tool-Kit>

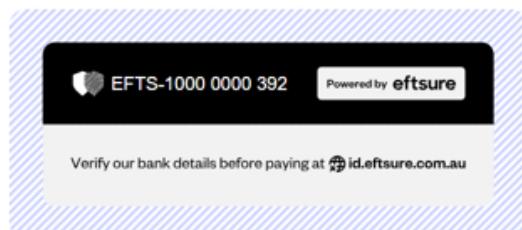
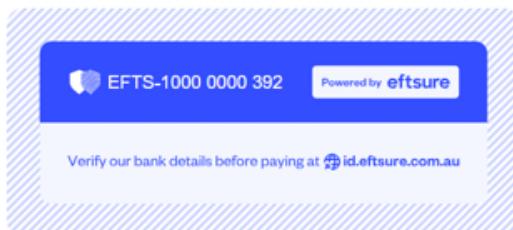
EftsureID Style Guide

These are the difference style options of EftsureID. You will work with your Customer Success Manager to select the EftsureID image that is suitable for your invoice requirements.

Color

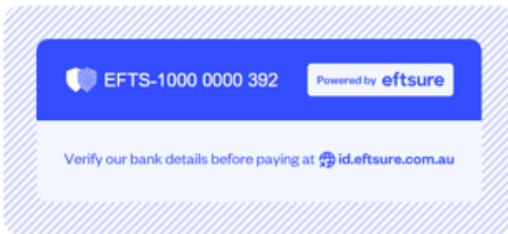
Blue

Black



Shape

Wide

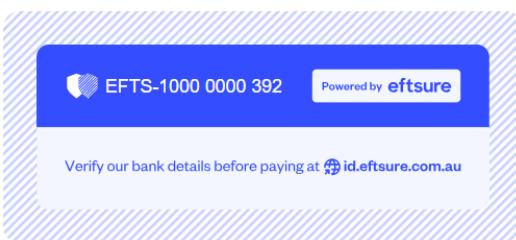


Slim

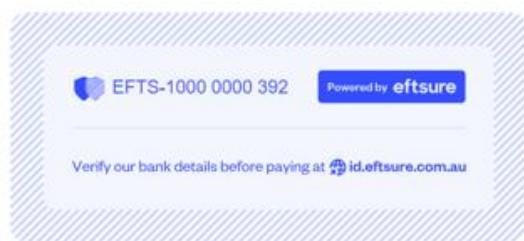


Style

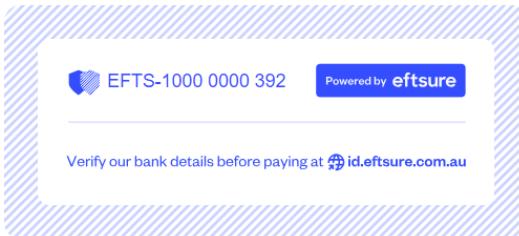
01



02



03



04



05



For more information, please check <https://helpdesk.eftsure.com.au/hc/en-au/articles/26346107965971-EftsureID-Style-Guide>

eftsureID inside Dynamics 365

eftsureID is now available inside Dynamics 365. To configure this feature, go to eftsure workspace > Parameters > eftsureID:

eftsureID

This section allows the configuration of eftsureID, an invoice authentication tool that verifies that the bank details on the invoice belong to the right business, are accurate and haven't been changed by fraudsters.

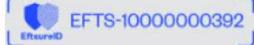
Company	Company name
DEMFI	Contoso Entertainment System ...
FRRT	Contoso Retail FR
FRSI	Contoso Consulting FR
GBSI	Contoso Consulting GB
GLCO	Contoso Group
GLMF	Contoso Entertainment System
GLRT	Contoso Retail
GLSI	Contoso Consulting
INMF	Contoso Entertainment System I...
ITCO	Contoso Italy
JPMF	Contoso Entertainment Japan
MXMF	Contoso Entertainment System ...
MYMF	Contoso Entertainment System ...
PDS	PNew Data Sharing AUS

Configuration

Once an image has been uploaded, the following options will become available:

REPORTS

[Upload eftsureID Image](#)

 **EFTS-10000000392**

Pay us securely
Verify bank details at: id.eftsure.com.au
or download the EftsureID mobile app

Customer tax invoice Yes

Free text invoice Yes

Project invoice Yes

Project tax invoice without billing rules Yes

Project tax invoice with billing rules Yes

At the time of writing, eftsureID is available on 5 standard reports for your customers.

Customer tax invoice,

Free text invoice,

Project invoice,

Project tax invoice without billing rules,

Project tax invoice with billing rules.

Form Setup

To use our reports, use our **Form Setup** shortcut or go to **Accounts Receivable > Setup > Forms > Form Setup**:

Finance and Operations Accounts receivable > Setup > Forms > Form setup

Standard view ▾

Print management setup

- Module - accounts receivable
 - Documents
 - Collection letter note
 - Customer account statement
 - Customer tax invoice
 - Original <Default>
 - Free text invoice
 - Interest note
 - Payment advice
 - Sales advance invoice
 - Sales agreement confirmation
 - Sales order confirmation
 - Sales order delivery note
 - Sales quotation
 - Sales quotation confirmation
- Module - inventory management
 - Documents
 - Picking list

ORIGINAL OR COPY IDENTIFICATION

Original / copy

Original

Name

Original

Suspend printing for this document

No

DEFAULT SETTING

Help

If conditional settings are not set up or do not apply, print the document using the following setting.

Destination

<Default>

Report format

All countries/regions

Report format

PESSalesInvoice.Report

SalesInvoice.Report

For each of the reports above, you will find a new report prefix with PES, which includes eftsureID images included

Once configured, your documents will display your eftsureID image where appropriate:



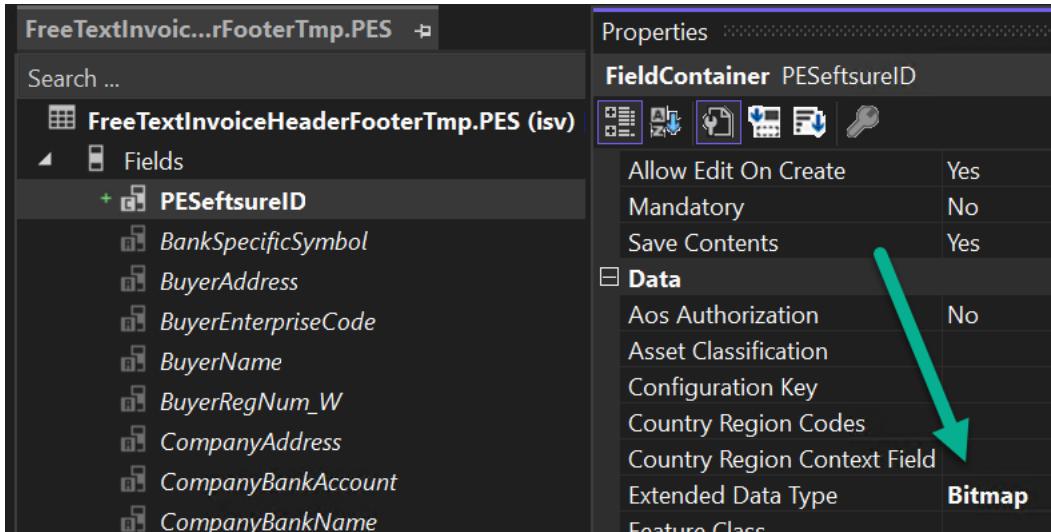
Custom SSRS Reports

If your organization uses custom reports, if your specific country is not available in our reports, or if the default position of our eftsureID logo is not optimal for your organization, you can reuse our framework to facilitate displaying this logo onto any SSRS report.

First locate the SSRS table and data provider class used for this report. In this example, we'll use the free text invoice for demonstrating how to achieve the same on your report.

The free text invoice uses table **FreeTextInvoiceHeaderFooterTmp** and data provider **FreeTextInvoiceDP**.

Create a new extension of this table and create a new field called XXXeftsureID on this table:



Allow Edit On Create	Yes
Mandatory	No
Save Contents	Yes
Data	
Aos Authorization	No
Asset Classification	
Configuration Key	
Country Region Codes	
Country Region Context Field	
Extended Data Type	Bitmap
Feature Class	

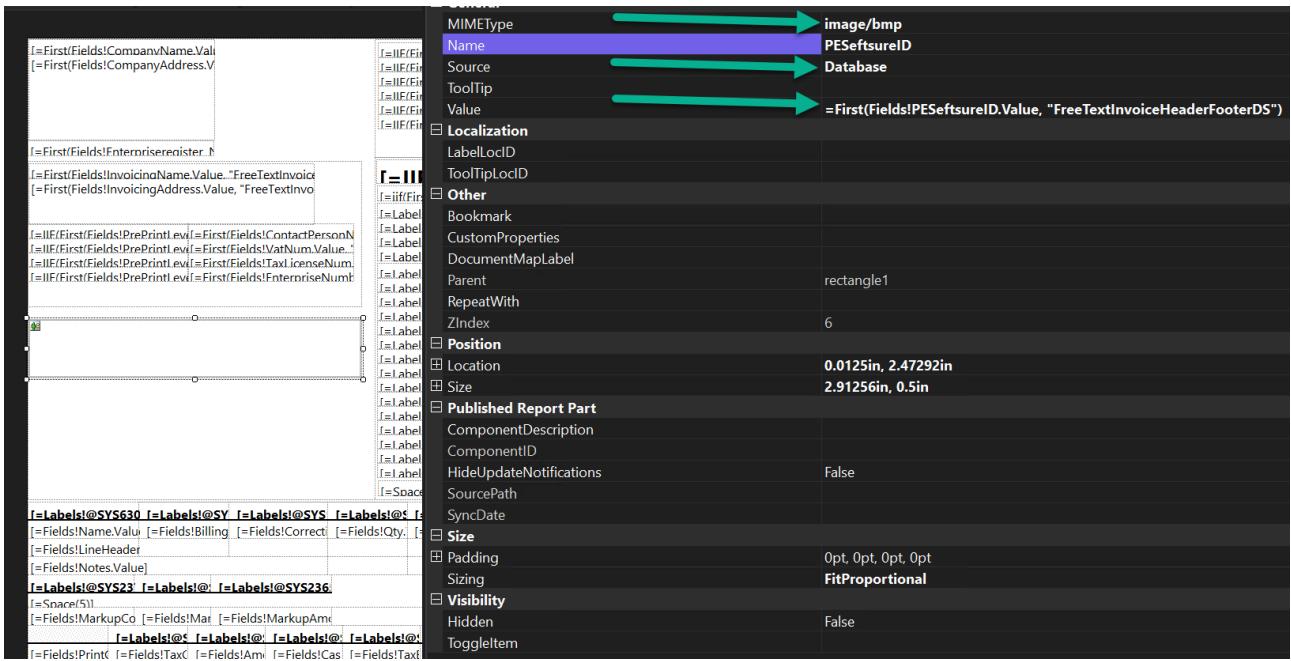
Create an extension of the data provider class:

```
[ExtensionOf(classstr(FreeTextInvoiceDP))]
public final class XXX_FreeTextInvoiceDP_Extension
{
    protected void populateFreeTextInvoiceHeaderFooterTmp(CustInvoiceJour _custInvoiceJour,
    CompanyInfo _companyInfo)
    {
        next populateFreeTextInvoiceHeaderFooterTmp(_custInvoiceJour, _companyInfo);

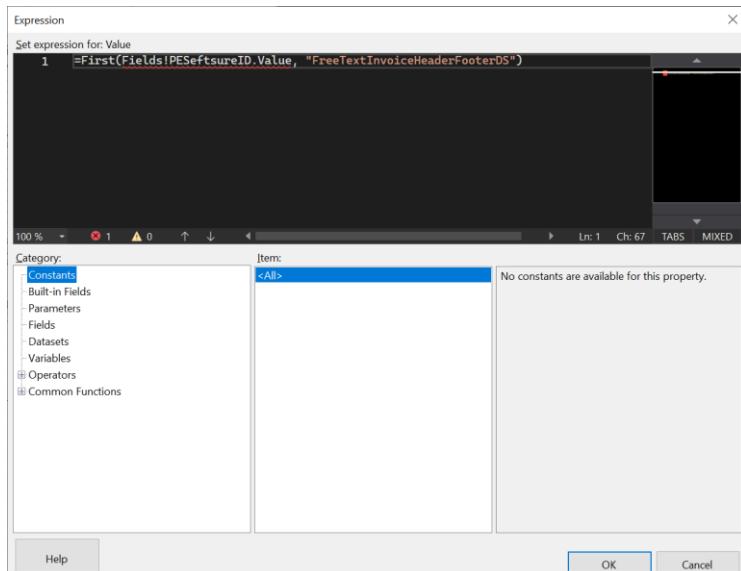
        PESParametersPerCompany PESParametersPerCompany = PESParametersPerCompany::findOrCreate();
        if (PESParametersPerCompany.Enabled && PESParametersPerCompany.eftsureID_FreeTextInvoice)
            freeTextInvoiceHeaderFooterTmp.PEeftsureID = PESParametersPerCompany.eftsureIDImage();
    }
}
```

In this example, we populate the new **PEeftsureID** field if eftsure is enabled and if the **FreeTextInvoice** option is enabled, you can use your own control logic, but our **eftsureIDImage** method will return the data as a container in the format expected by SSRS.

Finally add a new **Image** control on your SSRS report using the **Report designer**:



Make sure the source is set to **Database**, and **Value** is set to your new field.



You can then customize look and feel of your image.

Compile your model (with Build Reports option enabled), synchronise your database, deploy your report(s) and test your application.

Electronic reporting:

For electronic reporting, documents, we recommend embedding your eftsure ID image directly into your word or excel template.

For more information, see <https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/electronic-reporting-embed-images-shapes?context=%2Fdynamics365%2Fcontext%2Fcommerce>