eftsure ID

Eftsure inside Microsoft Dynamics 365 for F&O

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Contents
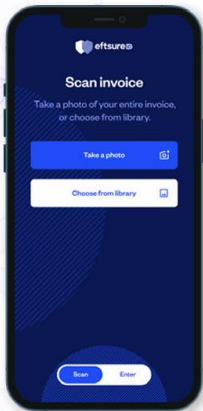
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What is EftsureID?

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:

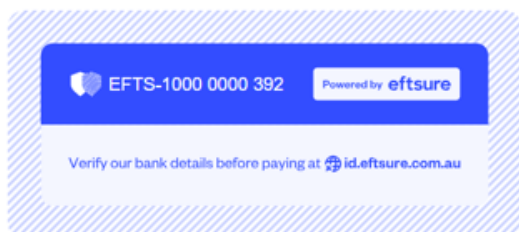EftsureID is available for download from the App Store and Google Play

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
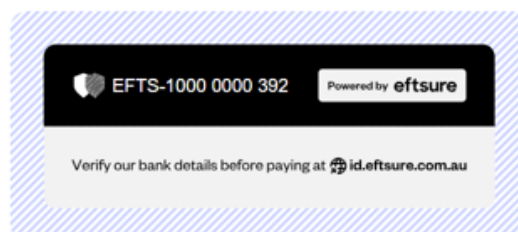
EftsureID Style Guide

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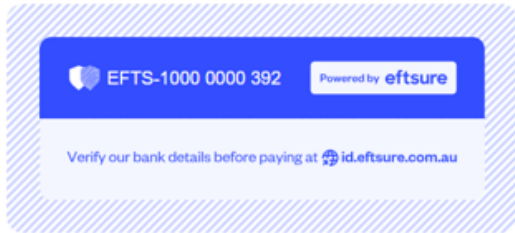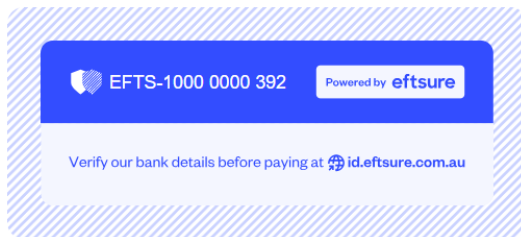
Color

Blue	Black

Shape

Wide	Slim
EFTS-1000 0000 392 — Powered by eftsure / Verify our bank details before paying at id.eftsure.com.au	EFTS-1000 0000 392 / Verify our bank details before paying at id.eftsure.com.au

Style

01

EFTS-1000 0000 392 — Powered by eftsure
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02

EFTS-1000 0000 392 — Powered by eftsure
Verify our bank details before paying at id.eftsure.com.au

03

EFTS-1000 0000 392 — Powered by eftsure
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04

EFTS-1000 0000 392
Verify our bank details before paying at id.eftsure.com.au
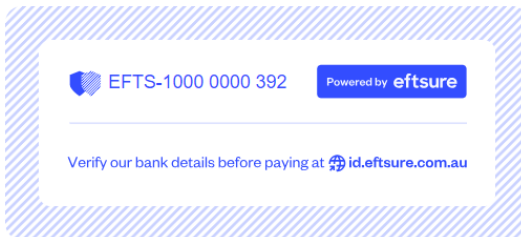
05
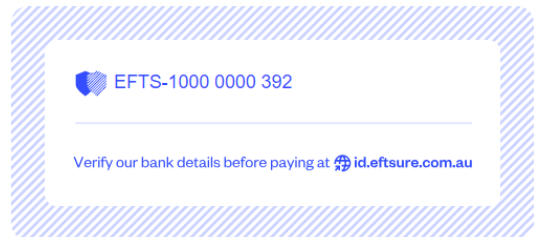
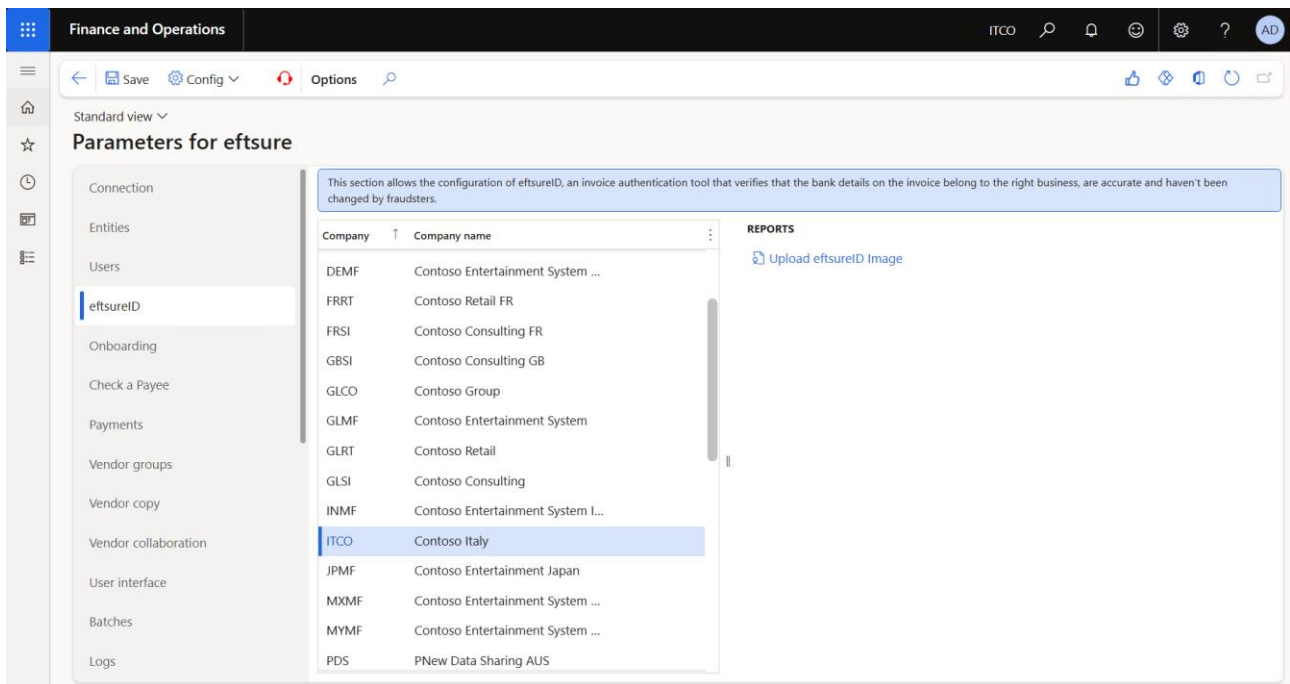EFTS-1000 0000 392
Verify our bank details at id.eftsure.com.au

For more information, please check https://helpdesk.eftsure.com.au/hc/en-au/articles/26346107965971-EftsureID-Style-Guide
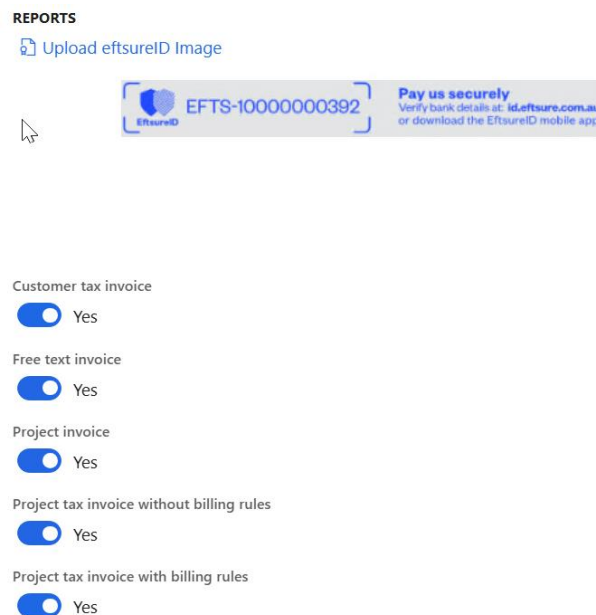
eftsureID inside Dynamics 365

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

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Configuration

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

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**:

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:
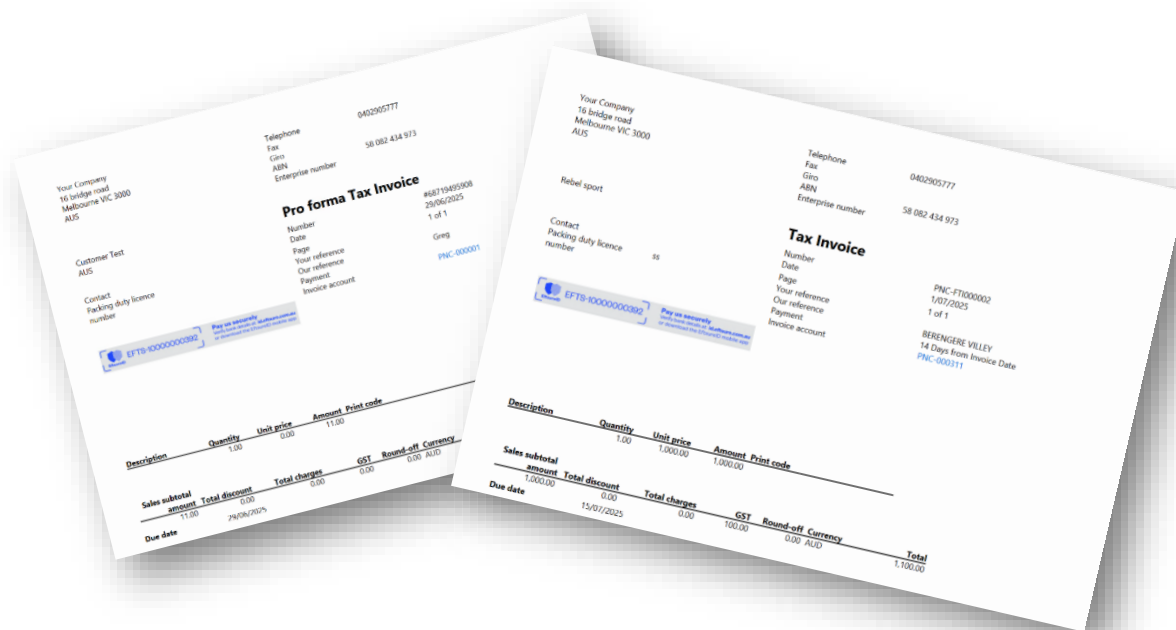
Custom SSRS Reports

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:
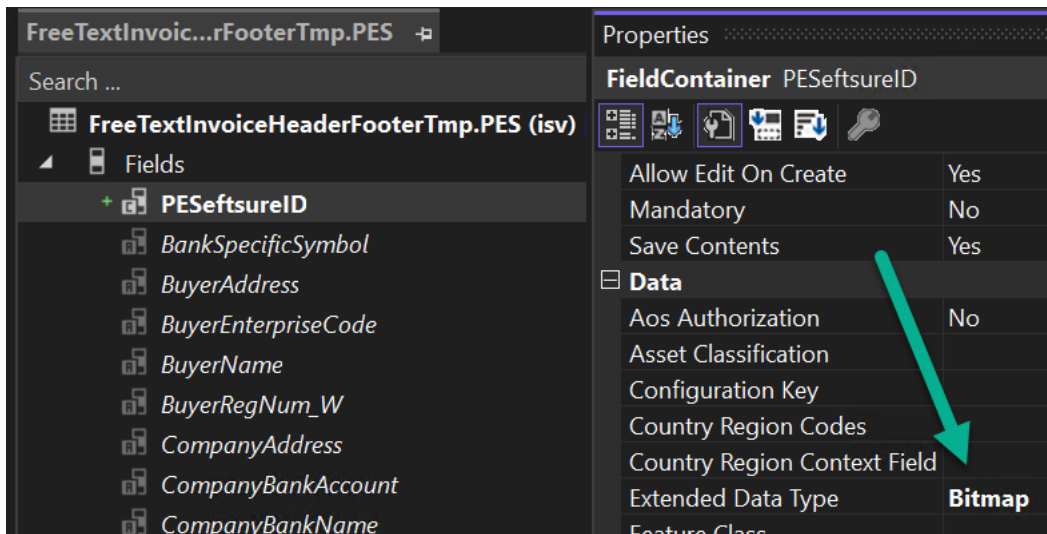

Create an extension of the data provider class:

```
[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.PESeftsureID = PESParametersPerCompany.eftsureIDImage();
    }
}
```

In this example, we populate the new **PESeftsureID** 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**:

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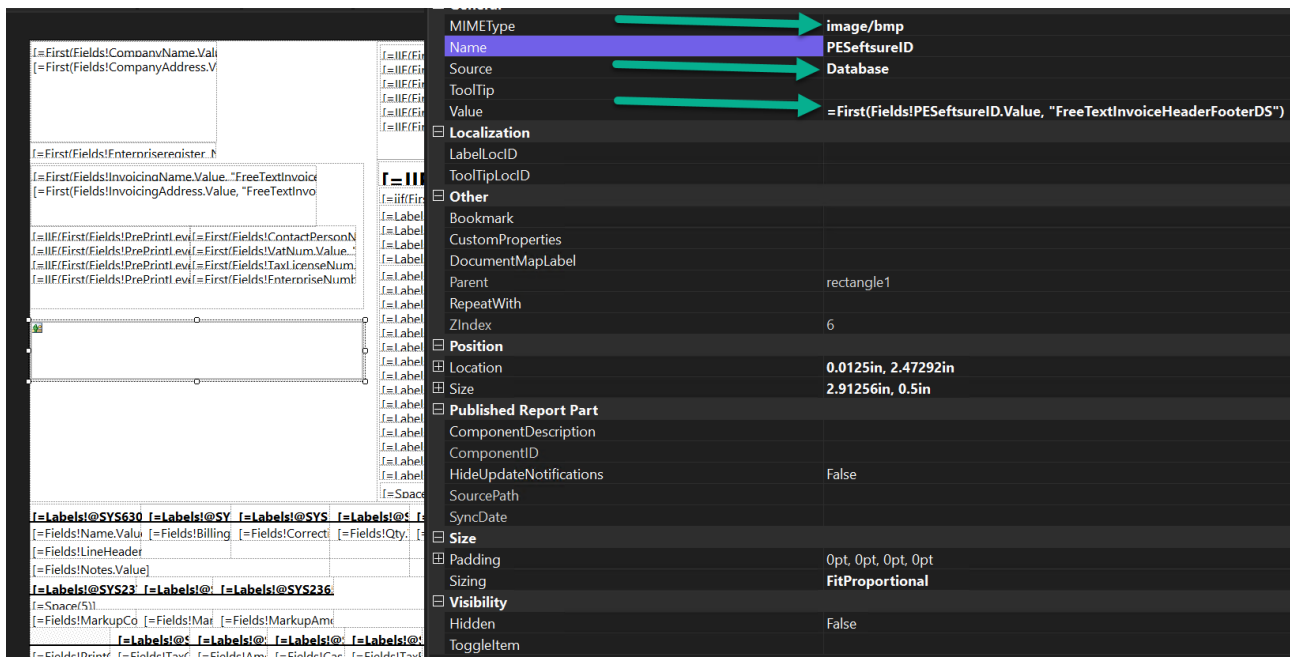
Make sure the source is set to **Database**, and **Value** is set to your new field.
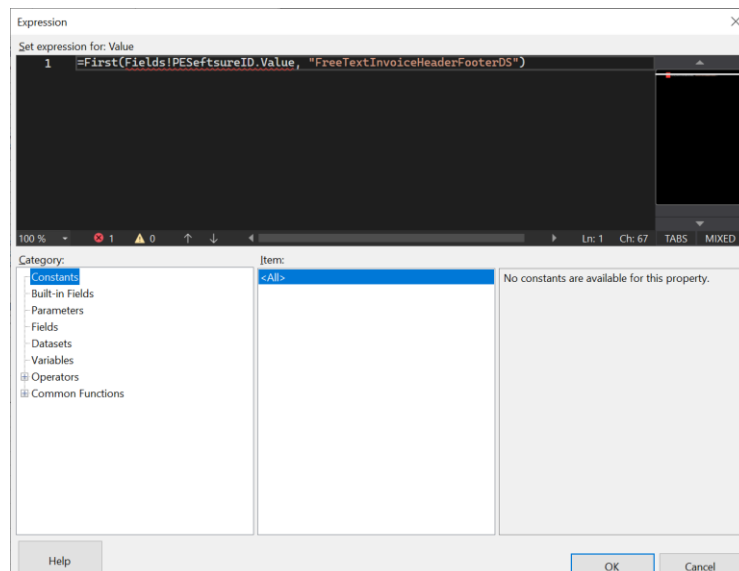
You can then customize look and feel of your image.

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

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