# Prerequisite for Mekorma Payment Hub Training in Dynamics 365 Business Central.

1. **Test Environment or Sandbox:**
   a. Create a Dynamics 365 Business Central Sandbox at your organization tenant or create a new tenant environment in CDX if access is available: (https://cdx.transform.microsoft.com/)
   b. If Using Partners Organization Sandbox Tenant (CDX instructions below):
      b.1. Access Dynamics 365 Business Central:
      b.2. Go to the Dynamics 365 Business Central website (https://businesscentral.dynamics.com/).
      b.3. Sign in using Partners admin organization's credentials.
      b.4. Once logged in, navigate to the admin center or the dashboard.
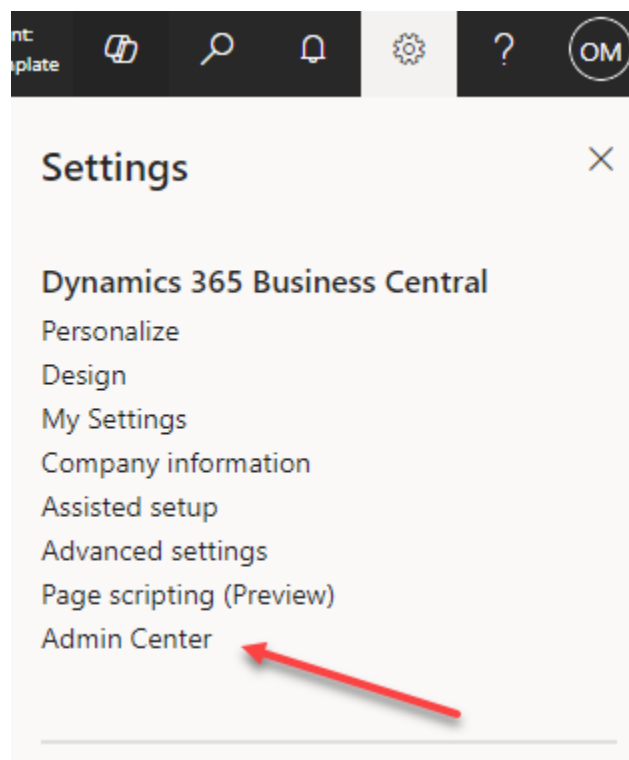
      b.5. Look for the option to create a new sandbox environment.
      b.6. Click on "New" or "Create" to start the creation process.
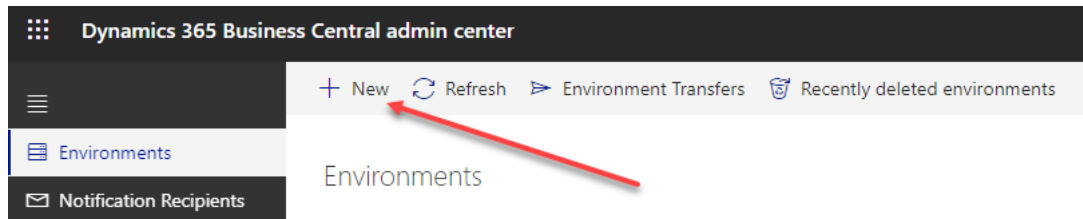
b.7.   Follow the prompts to specify details like the environment name, version, and region.

     b.7.1.   For Environment name use: Demo_Sandbox

     b.7.2.   For Type use: Sandbox

     b.7.3.   For Country select: US or CAN depending on your location.

     b.7.4.   Version: This will automatically populate.

b.8.   Confirm data and click on Create to start provisioning the sandbox.

b.9.   Once the sandbox environment is provisioned, you can access it from the dashboard or the environment list.

     b.10.   Click on the sandbox environment to open it and start using Dynamics 365 Business Central.

c. If using CDX, Creating a New Tenant Environment in Microsoft CDX:

    c.1. Go to the Microsoft Customer Driven Experience (CDX) portal (https://cdx.transform.microsoft.com/).

    c.2. Sign in using your Microsoft business credentials.

    c.3. In the CDX portal, navigate to the "My Environments" section.

    c.4. Click on "Create Tenant"

    c.5. Provide necessary details such as Period, Tenant Location, and Content Packs (license type)

        c.5.1.   Select: Dynamics 365 Business Central.

    c.6. Confirm the creation to start provisioning the new environment.

    c.7. Depending on the system load, provisioning might take some time. You can check the progress from the CDX portal.

d. Once the environment is provisioned successfully, you can access it from the CDX portal.

e. In My Environment page under Tenant Details, the Tenant Status will show when completed.

f. When tenant status shows Completed, you will be able to navigate to Tenant information page where you will be able to find, license information, location, trial period, and credential for admin and non admin users.

g. Copy Admin credentials.

h. Once your tenant is ready perform steps from **b.1** to **b.10** to create your sandbox environment.

i. **Mekorma Electronic Signatures installation**:

- Access the Extension Marketplace page within Dynamics 365 Business Central and install the free trial of Mekorma Electronic Signatures extension.

2. **Mekorma Payment Hub installation**:

- Navigate to the Extension Marketplace page within Dynamics 365 Business Central and install the free trial of Mekorma Payment Hub.

3. **Product Registration:**

- Once Mekorma Electronic Signatures and Payment Hub are installed, go through the registration process when prompted.
- Use the following link from Mekorma's User Guide for Product Registration process: https://userguide.mekorma.com/bcpaymenthub/early.access/en/topic/registering-bc-payment-hub
- When entering the Customer Registration Company Name, use 'TRN' as prefix, underscore, your initials and your company name:
  - As showing in this example: "TRN_OS_COMPANYNAME"

4. **Prepare Signature Image Files**:

- Use two sample signature files images if available.
- If not available, you can copy or screenshot the following images then save as image files format (jpg, png, bmp) on your local computer.
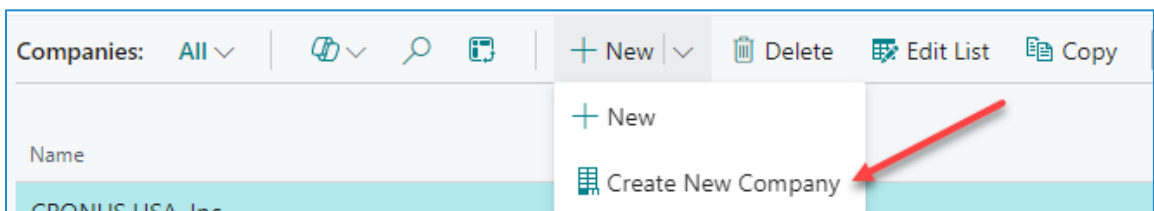
Sample Signature 1

Sample Signature 2

5. **Test Companies**:
   - Create a copy of CRONUS company in Sandbox environment by navigating to Companies page, select CRONUS line and click on Copy. Name new company Complete Solutions
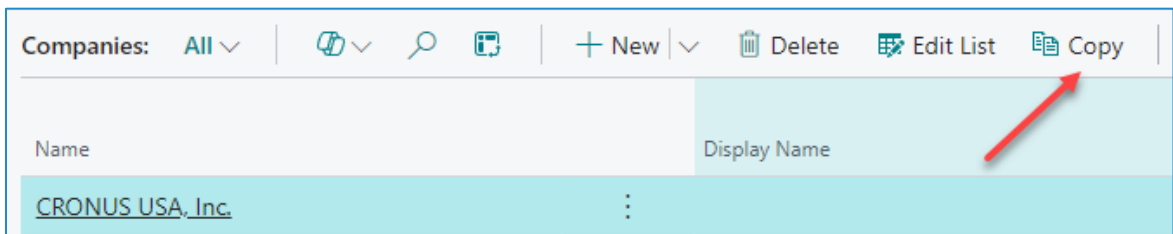
   - Create a second company using the Create New Company wizard on the Companies page and name it BTECH. Select Production – Setup Data Only.

6. **Setup Data for BTECH company.**
   - Create 2 Vendors with appropriate details.
     - Vendor one name it: Cyberdex
     - Vendor two name it: Devicor
   - Set up bank accounts for payment processing.
     - Bank one name it: OAK Bank
     - Bank two name it: Nova Bank
7. **Create Sample Invoices**
   - Create 4 invoices on each company two for each vendor

8. **Access verification for Non-Admin Users:**
   - For testing purposes, we will require two Non-Admin users to perform training. If you are using an evaluation environment, sample users will be available to activate. To activate and assign a license perform the following steps:
     - Log in to your Dynamics 365 Business Central Sandbox environment using your administrator credentials.
     - Go to Microsoft Admin Center (https://admin.microsoft.com/Adminportal/Home#/homepage/).
     - Navigate to Active > Active users
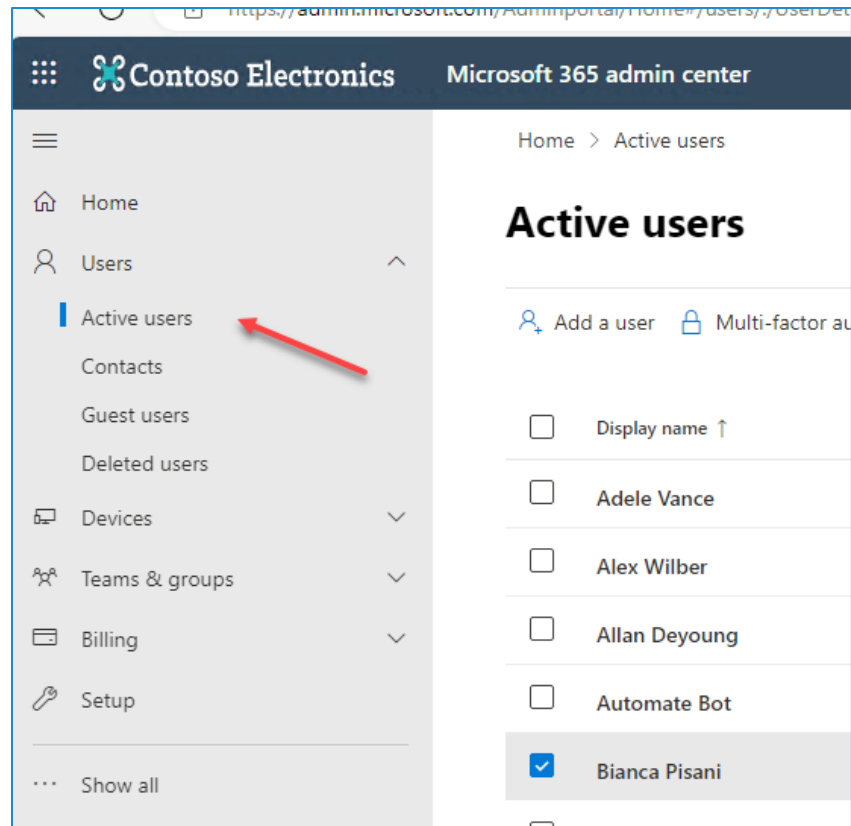
o Select any 2 users from the list, click on Manage product licenses. Select
Dynamics 365 Business Central license available and save.

- Reset credentials and save along email address of users activated.
- Once these steps completed go back to Dynamics 265 Business Central (https://businesscentral.dynamics.com/).
- Navigate to Users page and click on Update users from Microsoft 365.
- Now on Update users from Microsoft 365 wizard, click on Next. At this window you can click on View to verify the changes to be applied.
- Click on Finish. Changes will take some time to propagate from the Microsoft 365 licenses server.
- Once changes have been propagated, verify access to these new two users.
9. Prerequisite preparation completed. Please contact us if you have any questions in the preparation process.

Sample signature images:

Ken Ventura   Ryan Rose

Sample Signature 1

Sample Signature 2