



Easy PDF

for Microsoft Dynamics 365 Business Central

Registration Guide

How to register your Easy PDF application

Professional Messaging for Microsoft Dynamics 365 Business Central

About this Document

This document provides a description of the registration steps for Easy PDF.

You will need a valid registration to use the Easy PDF application beyond the 30-day trial period.

For additional description of product features please see:

Administrator Guide	Registration, Setup and User Management
Getting Started	User Guides
Developer Guide	For Developers

Available on the website at: <https://easypdf365.com/guides>

If you know what you are doing and don't need all the detailed explanations, then go to page 8.

Before You Start

This guide assumes that you have installed the Easy PDF application into Business Central.

If you have not yet installed Easy PDF please see the Administrator Guide for guidance.

Make sure that the Easy PDF application is configured for HTTP client requests.

If it is not configured for HTTP client requests then registration will fail.

In Business Central open the "Setup & Extensions" page.

Find and select the Easy PDF entry.

From the page menu select the Manage/Configure entry.

On the extension configuration page make sure the "Allow HttpClient Requests" is enabled.

OnPrem Registrations

Please note – if you will use Easy PDF in an OnPrem environment then your Business Central Partner should perform the registration. An OnPrem environment requires a Business Central Customer License which only your Partner can provide. (We cannot issue customer licenses)

Partners Note

To enable use of Easy PDF in the OnPrem environment you will need to generate a customer license with the Easy PDF module enabled (module# 70332080). To do that you will need to be registered as a reseller for Easy PDF. Please contact us so we can add you to the reseller list.

Also note, in PSBC there are two registered Easy PDF modules:

Module	Name	Publisher
14103460	Easy PDF	Binary Stream, Inc.
70332080	Easy PDF	Rios Software, LLC

You will need the second one not the first one.

Registration Scenarios

If you are reading this document, then you likely fall into one of the following categories. Please follow the steps appropriate for your situation.

1. SaaS
You are using Easy PDF in the Microsoft Business Central Cloud (SaaS) platform.
You are managing your own tenant (i.e., you do not have a Business Central Partner)
2. SaaS/with-Partner
You are using Easy PDF in the Microsoft Business Central Cloud (SaaS) platform.
You have a Business Central Partner who is managing your tenant.
3. OnPrem/with-Partner, new Easy PDF customer
You are purchasing Easy PDF for the first time.
You are using Easy PDF in a Business Central On-Prem environment.
You have a Business Central Partner who is managing your system.
4. OnPrem/with-Partner, Upgrade from Dynamics NAV
You previously purchased Easy PDF for a Dynamics NAV or Business Central v13/14 platform.
You are upgrading to a later versioned Business Central OnPrem platform.
You have a Business Central Partner who is managing your system.

SaaS

If you are a SaaS customer (#1 above) then you should follow the steps describing how to start a 30-day trial and subsequently register your Easy PDF installation on the website.

For the SaaS environment Easy PDF supports the following purchase option:

1. Named user, monthly subscription

When registering your installation on the Easy PDF website you will need to identify how many user licenses you wish to purchase. Purchase will create a monthly subscription payable by credit card or PayPal.

Please also read the section below describing the transient license feature. That may be appropriate if you wish to provide Easy PDF functionality to users who will use the product infrequently.

SaaS/with-Partner

If you are a SaaS customer with a Business Central Partner (#2 above) then you should request your Partner to perform the registration. It is not required that your Partner perform the registration however they will likely have experience with Easy PDF and can advise you on the best options for registration.

OnPrem/with-Partner, new Easy PDF customer

When using Easy PDF in an OnPrem environment your Partner must perform the installation and registration. This environment requires a Business Central Customer License with the Easy PDF module enabled – only your Business Central Partner can provide the license.

For the OnPrem environment, Easy PDF supports two purchase options:

1. Named user, monthly subscription
2. Product purchase, annual software maintenance

You should discuss these options with your Partner and decide which is best for your situation.

OnPrem/with-Partner, Upgrade from Dynamics NAV

If you previously purchased Easy PDF and are upgrading to a later versioned Business Central platform then we will gladly honor the terms of your prior purchase so long as your software maintenance is current.

In this scenario your Partner must perform the registration. They must update your Business Central Customer License and obtain an Easy PDF Upgrade key.

Obtaining a Customer Key

To register Easy PDF, you will first need a Customer Key.

The Customer Key associates your app installation with your account on the Easy PDF website.

You obtain a Customer Key by starting a 30-day trial.

Start a 30-day trial

When you start a 30-day trial a new Customer Key is automatically assigned.

The 30-day trial also assigns a temporary, full featured, registration to your Easy PDF installation.

The application will run, fully functional until the trial period expires.

Starting a 30-day trial is appropriate if it is the first installation of Easy PDF by your company or you are just kicking the tires to check out the features.

To start a 30-day trial open the Easy PDF Administration page:

- In the search dialog enter “Easy PDF Administration” and select the link
 - On the administration page select “Registration” from the Registration menu
 - On the registration page select “Start 30-day Trial” from the Registration menu
- Confirm that you wish to start the trial.

The application will download a trial registration with a new Customer Key

Obtaining an active Registration

To use (non-trial) Easy PDF you will need an active Registration.

You can obtain a registration in a couple of different ways:

1. SaaS or SaaS, with Partner -- Register your trial installation on the website
A registration will automatically download when the trial expires
2. Import a registration from another (registered) installation
3. Receive a registration from Easy PDF Support or your Business Central Partner

Register your installation on the website

If you are a SaaS or SaaS/with-Partner customer, have started a 30-day trial and wish to continue using Easy PDF beyond the trial period then you will need to purchase a registration.

The procedure for registration on the website is described below.

If you have a Business Central Partner we recommend that you ask them to perform the registration.

Copy your Registration from another installation

Note: Copying a Registration from a 30-day trial installation is not supported – it won't work.

If you have already registered Easy PDF in an environment in your SaaS tenant, or an OnPrem server then you can copy that registration to your new installation.

You would typically follow this procedure if you have already registered a debug, development or test installation and then wish to use that registration for your production system (or visa-versa).

Retrieve the key from the registered installation:

- On the registered installation open the Easy PDF Administration page
- On the administration page select the Registration menu option
- On the Registration Page the Customer Key and Instance Key will be displayed

Assign the key to the new installation:

- On the new installation open the Easy PDF Administration page
- On the administration page select the Registration menu option
- On the Registration Page select the Registration/Manual Entry and Registration/Import options
Enter the Customer Key from the registered instance into the Customer Key field
Enter the Instance Key from the registered instance into the Registered Instance Key field

Note: By default, the Easy PDF registration is limited to three (3) installations. That provides for production, test and development environments. The standard registration procedure will not let you exceed this limit. To enable more (than the standard limit of 3) installations you will need to contact Easy PDF Support or your Business Central Partner.

Receive a Registration from Easy PDF Support or your Business Central Partner

Under rare circumstances you may need to receive a specific registration from Easy PDF Support or your Business Central Partner. In this case the Registration will be sent to you as a string of encrypted text.

When you receive the registration you will need to install it as follows:

1. Open the Easy PDF registration page
2. On the registration page, select the Registration/Manual Entry option.
Confirm that you wish to proceed.
3. Copy the encrypted key that was sent to you into the Application Key field on the registration page, then tab out of the field.

Assuming the encrypted registration is valid the registration status will update.

Steps for registering on the website

These are steps for registration on the Easy PDF website.


You should execute this procedure if you are a SaaS customer seeking to register your Easy PDF installation before (or after) a 30-day trial period expires.


To successfully execute this procedure you will need:

1. Your Customer Key
See the section above – Obtaining a Customer Key
2. Upgrade Key (only required if upgrading from the Dynamics NAV environment)
An upgrade key obtained from Easy PDF Support
3. The number of user reservations to be purchased
Registration will ask how many user reservations (aka., user license) you wish to purchase. You should know this number before starting registration.
Some guidance on estimating this number is provided here:
<https://easypdf365.com/guidance>
4. Payment Method
Registration will subscribe you to a recurring monthly payment, payable by credit card or PayPal.

Registration Procedure

1. Open a web browser and navigate to the Easy PDF registration page
<https://easypdf365.com/registration>

SUPPORT@EASYPDF365.COM  [HELP](#) [SUPPORT](#) [PRICING](#) [PARTNER](#) [LOGIN](#)

 **Easy PDF**
for Microsoft Dynamics 365 Business Central REGISTRATION

Professional Messaging for Microsoft Dynamics 365 Business Central

Start Payment Checkout Confirmation

Thank you for choosing Easy PDF!

On this page you may purchase a new Easy PDF registration.
To modify an existing registration please login (top right) with your Customer credentials.
After completing this page you will be taken to another where you may select your method of payment.
Your purchase will not be complete and you will have no obligations until you have confirmed your purchase on the checkout page.

Note to Partners: You must login *before* registering new customers

Customer Key

To begin please enter the Customer Key located on the Easy PDF Registration page in Microsoft Dynamics 365 Business Central.
This key is required in order to generate the registration for the tenant. [Show Me](#)

Customer Key:

Upgrade Key:

Enter # of Reservations

Please enter the number of reservations to include with your purchase.
For additional guidance please visit see the [Guidance](#) page.

Reservations: USD \$6 /mo

Transient Reservation Pool Free with purchase of 5 or more reservations

Total (monthly): \$60

Agree to Purchase

You are preparing to purchase a registration for Easy PDF for Microsoft Dynamics 365 Business Central. With the registration, you will be entitled to use the product with up to three instances/databases in your Dynamics 365 Business Central tenant.

Purchase of the registration will subscribe you to a recurring billing plan for a monthly charge in the amount of your order. A one time, 30-day free trial period is granted each new customer. Your payment will be due at the end of the free trial period. You may cancel your order prior to the first payment with no charges incurred. Subsequent to the first payment, you may cancel your subscription at any time whereupon the product will remain operational until the date of the next payment due. There will be no refunds for payments already processed.

In order to proceed please consent to the above payment terms.

I agree to the payment terms

Customer Credentials

Please enter your contact details. The e-mail address will only be used to communicate with you regarding details of your subscription -- it will not be distributed nor used for any other purpose.
Note: The password that you enter will be needed should you decide to modify or terminate this subscription at a later date.

Company Name:

Contact Name:

E-Mail Address:

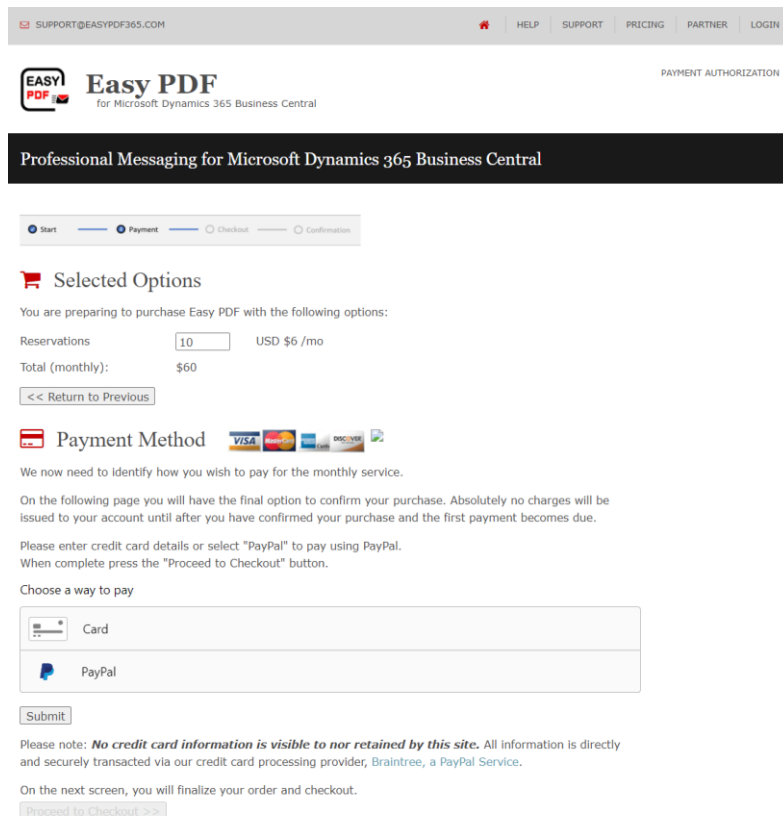
Confirmation Code:

Password:

Confirm Password:

On the next screen, you will select your method of payment.

2. Enter the Customer Key into the Customer Key field
3. If upgrading, enter the Upgrade Key into the Upgrade Key field
4. Enter the number of reservations to purchase
5. Agree to the payment terms
6. Enter the Customer Details
 - Company Name – the end-user company name
 - Contact Name – the name of the person who will receive account correspondence
 - Partner name if registering for a client
 - Customer name if self-registering
 - Contact Email – email address for the point of contact
All account correspondence will be sent to this address
7. Click the Verify button
The website will send a verification code to the email address in the Contact Email field
8. Enter the verification code from the email
9. Enter a password for the Easy PDF Customer account
The password must satisfy the minimum strength password requirements as displayed.
10. Reenter the password into the Confirm Password field
11. Press the Proceed to Payment Options button
You will be navigated to the Payment Options page



SUPPORT@EASYPDF365.COM | HELP | SUPPORT | PRICING | PARTNER | LOGIN

EASY PDF
for Microsoft Dynamics 365 Business Central

PAYMENT AUTHORIZATION

Professional Messaging for Microsoft Dynamics 365 Business Central


Start | **Payment** | Checkout | Confirmation

Selected Options

You are preparing to purchase Easy PDF with the following options:

Reservations: USD \$6 /mo
Total (monthly): \$60

[<< Return to Previous](#)

Payment Method 

We now need to identify how you wish to pay for the monthly service.

On the following page you will have the final option to confirm your purchase. Absolutely no charges will be issued to your account until after you have confirmed your purchase and the first payment becomes due.

Please enter credit card details or select "PayPal" to pay using PayPal.
When complete press the "Proceed to Checkout" button.

Choose a way to pay

Card

PayPal







Please note: **No credit card information is visible to nor retained by this site.** All information is directly and securely transacted via our credit card processing provider, Braintree, a PayPal Service.

On the next screen, you will finalize your order and checkout.

[Proceed to Checkout >>](#)

12. Select your method of payment – credit card or PayPal
13. Enter your credit card or PayPal details

Paying with a credit card

 Pay with card     


Card Number
.....


Expiration Date (MM/YY) CVV (3 digits)
MM/YY ...

[Choose another way to pay](#)

Please note: **No credit card information is visible to nor retained by this site.** All information is directly and securely transacted via our credit card processing provider, Braintree, a PayPal Service.

Paying with PayPal



 PayPal


The safer, easier way to pay

[Choose another way to pay](#)

14. After entering the payment method details press the Submit button

Paying with Card

 **Ending in 0005**
American Express 

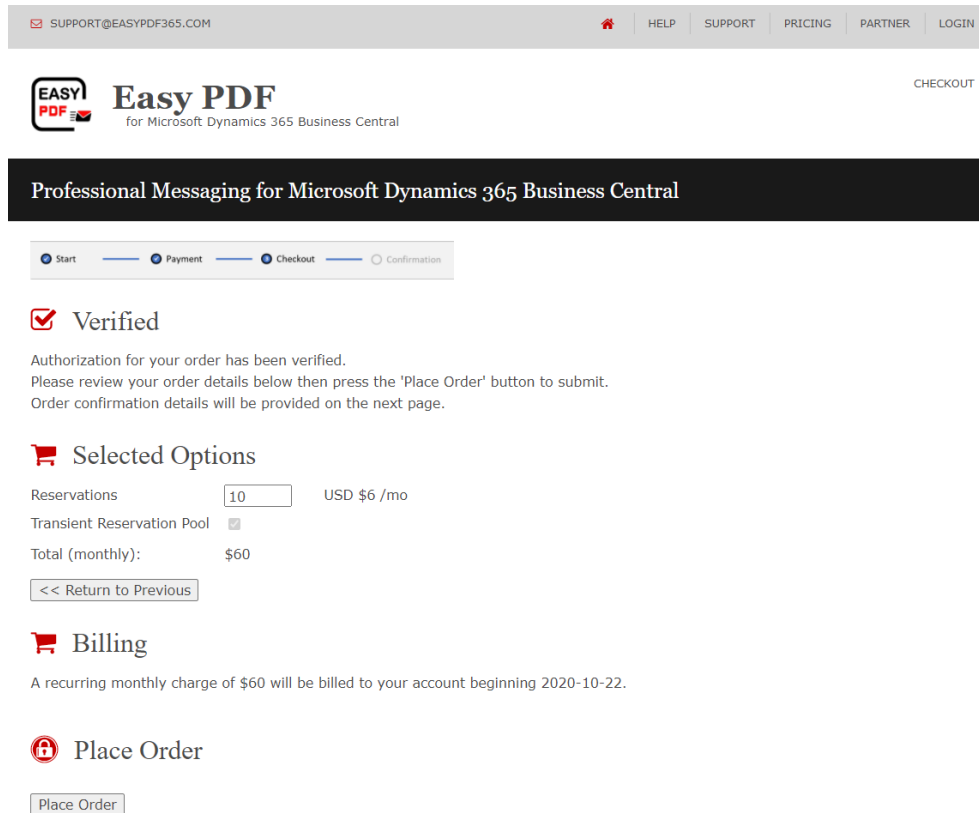
[Choose another way to pay](#)

Please note: **No credit card information is visible to nor retained by this site.** All information is directly and securely transacted via our credit card processing provider, Braintree, a PayPal Service.

On the next screen, you will finalize your order and checkout.

15. Press the Proceed to Checkout button

You will be navigated to the Checkout Confirmation page



SUPPORT@EASYPDF365.COM | HELP | SUPPORT | PRICING | PARTNER | LOGIN

EASY PDF for Microsoft Dynamics 365 Business Central


CHECKOUT

Professional Messaging for Microsoft Dynamics 365 Business Central


Start — Payment — **Checkout** — Confirmation

Verified


Authorization for your order has been verified.
Please review your order details below then press the 'Place Order' button to submit.
Order confirmation details will be provided on the next page.

 **Selected Options**

Reservations USD \$6 /mo
Transient Reservation Pool
Total (monthly): \$60

 **Billing**

A recurring monthly charge of \$60 will be billed to your account beginning 2020-10-22.

 **Place Order**

16. Press the Place Order button to finish

You will see an Order Confirmation with details of your purchase.

You will also receive an email (sent to the point of contact) with your order and account details.

Updating the Registration in Business Central

No further action is required following the purchase of a registration.

The Easy PDF app in Business Central will automatically update the registration when the trial period expires.

However, if the trial period has already expired or you wish to force the registration to update then follow these steps:

1. Open the Easy PDF Registration page
2. On the registration page select the Registration/Check for Updates menu option

The registration will update and the new registration status will display.

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