



# Mekorma Action Board: FAQs

## *Can the Action Board work across companies or only in one company at a time?*

The Action Board works across companies (and checkbooks!) in a single process. It is designed to log in and out of companies for you, so AP staff are freed from the repetitive button-clicking of standard GP processing.

## *Does the Action Board work with Binary Stream's Multi-Entity Management (MEM)?*

Yes! MEM integrates tightly with the Action Board. Payment batches can be built and processed for both Centralized and Decentralized processes.

## Building Batches

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### *Can you build check batches and EFT batches at the same time?*

Yes, you can. Both checks and EFTs can be included in the same Process ID and run together. The Action Board will still follow Dynamics GP restrictions - separate batches will be created for checks and for EFTs - but you will only need to run one process to create both sets of batches.

### *Can I remove a check from a batch after it is built? Can I review payments before printing them?*

- In this regard, building a payment batch with the Action Board is no different than building a payment batch using one of the standard Dynamics GP windows. Once the payment batches are built, the batches are available for editing and review in all the standard places they normally are in Dynamics GP, including:
  - Edit Payment Batch
  - Edit Vendor Payment
  - Build Payment Batch
- You can also have the Edit List automatically printed or generated to a file when the batches are being built.
- Please note: if you regularly edit payments, do not activate our automatic approval feature. Approval requests should be made after all batches are completely edited.
- If you do find yourself editing batches regularly, please [schedule a consultation](#) with our Professional Services team. We can help clarify the thought process you follow to eliminate or add payments, and then demonstrate how to further automate the process. It may be possible to eliminate the need for manual editing.

# Security/ Approvals

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## *We require approvals before each check batch is printed. Can we still do that?*

Yes. With the Action Board, you have the option to automate approval requests, so that as each batch is built by the system, approvers receive notifications that their approval is needed. The batches will remain locked for further processing until approvers complete their approvals in Dynamics GP, or within the Mekorma PowerApprovals mobile application.

## *Can you restrict which companies users see in the Action Board?*

The Action Board follows permissions for company access as configured in Dynamics GP. Users will only see those companies they have access to in GP.

# Printing Payments

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## *Does the Action Board work in a Terminal Server environment?*

Yes, but you must have your check printer mapped as a network printer with a static name. The Action Board will not print properly if your check printer changes based on the user session ID (session printer), unless you implement a session printer renaming solution such as [RenPrinters](#) from Babbage Technologies. This is true for Named Printers or Mekorma's standard print window.

As of Mekorma build x80, you will have the ability to set the printer selection by company in the Action Board Setup window.

## *Can you print reports (such as the check register and EFT Remittance report) to the screen?*

No, you must print to a file or printer.

# Implementations & Training

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## *Is this something you can setup for yourself or does it require assistance?*

Many of our customers have used our online [User Guide](#) to set up the Action Board by themselves. We do offer a paid implementation service where we will work with you to set it up the way you need it to be, and train your staff to use it. [Request a consultation](#) with an implementation expert for more information.

# Cost

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## *Are there any setup or recurring charges?*

The Action Board is available for all Payment Hub license owners at no additional cost. The only recurring charge is Mekorma Payment Hub annual maintenance.

There are no required setup fees. However, Mekorma does offer a paid implementation and training service to help you, as needed. [Request a consultation](#) for more information.