

# Introducing MachPanel v.8

## MACHPANEL®



## MachPanel Automation Module for Microsoft CRM

- Datasheet – MachPanel Automation Module for CRM

- MachSol Inc.

Revision: 1.0

[www.MachSol.com](http://www.MachSol.com)

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# 1. About This Document

This document focuses on one of MachPanel's product i.e. MachPanel Automation Module for Microsoft CRM. An overview of MachPanel Provisioning System along with Cloud/Enterprise hosting is presented. The document highlights how MachPanel employs Cloud/Enterprise hosting and offers **MachPanel Automation Module for Microsoft CRM**. Finally, the document concludes to decide MachPanel's supremacy over other products in case of Cloud/Enterprise hosting.

## 2. Fundamental Concepts

Before proceeding further, let's start with the fundamental concepts which will help you better understand the solution according to your need. Fundamental concepts include:

- MachPanel Provisioning System
- MachPanel Shared/Traditional Hosting (Web Hosting)
- Cloud Hosting through MachPanel (Enterprise Products)

## 3. MachPanel Provisioning System

MachPanel Provisioning System is **ALL-in-ONE** complete business automation solution for Windows. It includes everything a web hosting company needs to run its day-to-day business operations. It helps to run a profitable, extensible and successful web hosting business using latest tools and cutting edge technology.

It caters the need of **Traditional** as well as **Enterprise Hosting** supporting wide range of features including **Billing, Management, Help Desk automations** and **Network Monitoring**. In addition to automation, it provides broad 3rd party integrations with popular platforms.

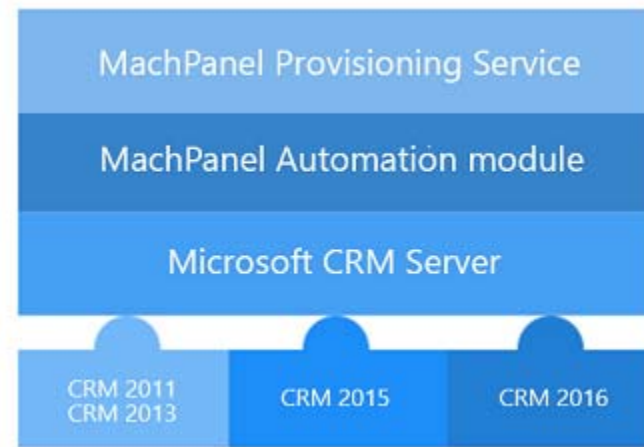
## 4. What is MachPanel Automation Module for Microsoft CRM?

Latest MachPanel release encompasses the launch of a whole new product (with reseller module) that caters Customer Relationship Management (CRM) and provides complete operational support. This product is known as MachPanel Automation Module for Microsoft CRM.

MachPanel implements all operation of Microsoft CRM together with support for multitenancy, enabling your enterprise to improve productivity and work smarter. **MachPanel Automation Module for Microsoft CRM** adds billing, provisioning and management of Microsoft CRM Services to your hosted services. It allows your enterprise to perform better and in entirety, by covering every functional capability (e.g. CRM site creation/deletion, Enable/Disable CRM site, CRM Site/Users/Domains, roles management, reporting etc.) .

## 5. Service Architecture

MachPanel Automation Module for Microsoft CRM fully supports Microsoft Dynamics CRM 4.0, 2011, 2013, 2015, 2016 and Microsoft Dynamics 365.



## 6. Detailed Features List

MachPanel Automation Module for CRM offers a wide range of functionality. Following features are available to service providers who have purchased MachPanel Automation Module for Microsoft CRM.

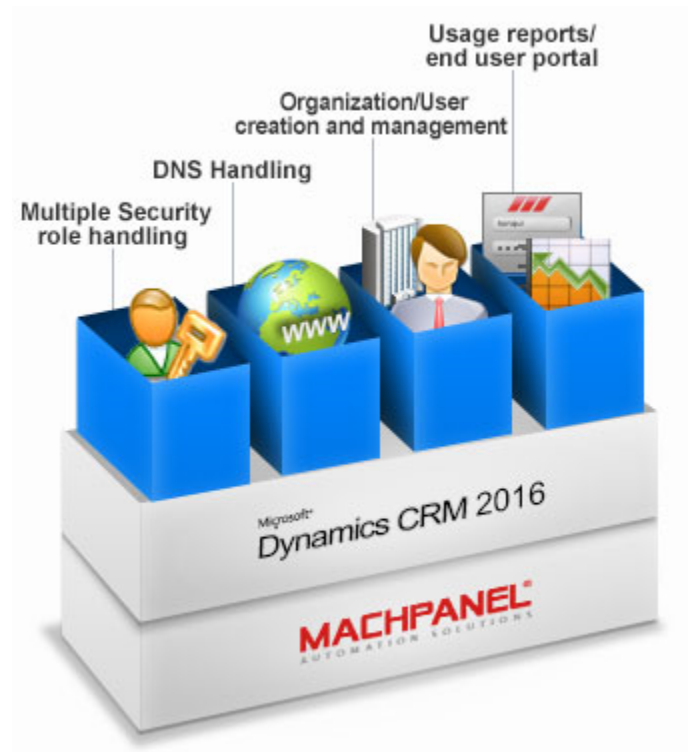
### 6.1 Key Features

- Supports MS Dynamics CRM 4.0, 2011, 2013, 2015 & 2016 multi-tenancy that allows the creation of multiple Sites on a single server.
- Internet-Facing Deployment (IFD) CRM web site for every CRM Site.
- CRM Site management.
- CRM users, domains and roles management.
- 4th level interface in Panel with ability for AD User to login and change password.
- Reporting feature.
- Microsoft Dynamics 365 support

It gives end users the capability to enhance company's sales, marketing, and customer service processes. With **MachPanel Automation Module for Microsoft CRM**, service providers can perform following tasks:

- CRM Site creation/deletion
- Add/Remove update Users/Domains/Roles
- DNS Handling
- Dynamics CRM 4.0, 2011, 2013, 2015 & 2016 and Dyanmics 365 Resources in MachPanel Service Plan Wizard

Below is the pictorial illustration of the Microsoft Dynamics CRM features:



## 6.2 High Level Feature List

Following are the high level features of MachPanel Automation Module for Microsoft CRM:

### A. MachPanel Features

- ✓ High Performance Windows Based Control Server
- ✓ Unlimited (Remote) Servers, Roles and Active Directories
- ✓ Multi-language and Localization Support
- ✓ Multi-level Management i.e. Service Provider, Reseller and Self-Service Customer Control Panel
- ✓ Fully Private Labeled for Provider, Reseller and End Customer Control Panel
- ✓ Support for Commission based Reseller model, and Subscription Based Reseller Model
- ✓ Ability to Manage Multiple Active Directory Domains
- ✓ Fully Load Balanced Control Panel via NLB or any other load balancer
- ✓ High Availability solution encompassing Load Balancing and fault tolerance
- ✓ IP Lock-Down policy for system/staff users.
- ✓ One click backup of MachPanel database from Control Panel Configuration Studio
- ✓ ADSync feature to programmatically allow automatic Active Directory Synchronization
- ✓ Detailed Audit Logs to maintain history of all operation performed via control panel
- ✓ Secure Encrypted Information Exchange between Remote and Control Server
- ✓ Segregated OU structure
- ✓ Organization/User listing
- ✓ Subscribe Existing Organization and Users to Exchange, Skype for Business and SharePoint Services
- ✓ Complete Billing, Helpdesk and e-Commerce Center

- ✓ Single Sign-On for all Enterprise Extensions
- ✓ 3rd Party Authentication for Control Panel
- ✓ Two factor Authentication (2FA) for all types of Users
- ✓ Automatic Setup & Billing Email Notification Manager
- ✓ Self Service Password Reset via 4th Level Control Panel Access for Active Directory Users
- ✓ Import Utility for Importing Existing CRM Organizations and Users into MachPanel for Management
- ✓ Built in E-Commerce Store with Fraud Control & Prevention
- ✓ Support for various payment gateways for automatic payment processing
- ✓ Safer Pay integration added. **New!**
- ✓ PCI Compliance integration for Authorize.Net CIM and PayPal Pro Payflow Edition
- ✓ MachPanel Store API to facilitate providers to completely customize the online web store
- ✓ Detailed Audit Logs to maintain history of all operation performed via control panel
- ✓ Work flows for various operations
- ✓ Quick links to subscription management interfaces on Customer's dashboard.
- ✓ Terms and conditions Providers/Resellers
- ✓ Ability to customize skin. Add Custom title on Dashboard. **New!**
- ✓ Supports MailChimp for Mailling Lists
- ✓ Login with ADFS functionality added **New!**
- ✓ MachPanel REST API Configuration **New!**

## B. Microsoft CRM Features

- ✓ Microsoft Dynamics CRM 2011, 2015, 2016 Organization Provisioning
- ✓ Complete Migration Capabilities
- ✓ Multilingual Support
- ✓ Child Business Units Support
- ✓ Multiple Security Roles Handling
- ✓ HTTPS Support (WCF service for communication over HTTPS)
- ✓ Multiple domain Handling (UPN suffixes)
- ✓ Inventory and Monitoring
- ✓ SPLA and Usage Reports.
- ✓ Bulk User creation for CRM organizations.
- ✓ Ability to perform Group Actions on CRM users (perform operations on multiple users in a single go)
- ✓ Quick links to subscription management interfaces on Customer's dashboard
- ✓ Microsoft Dynamics CRM 2013/ 2015 /2016 service management supported
- ✓ Microsoft Dynamics 365 support

## 6.3 Supported Features of MachPanel Automation Module for Microsoft CRM

Following is the list of supported features of MachPanel Automation Module for Microsoft CRM:

Features		Supported
Active Directory Management	<ul style="list-style-type: none"> <li>➤ Active Directory Management</li> <li>➤ Add/Remove AD Organizations</li> <li>➤ Add/Remove AD Users</li> <li>➤ Add user details while adding AD user</li> <li>➤ Activate CRM on AD Users Created via MachPanel</li> <li>➤ Provider/Reseller has an ability to edit AD user from</li> </ul>	✓

	MachPanel AD interface	
<b>Service Offering Options</b>	<ul style="list-style-type: none"> <li>➤ Intuitive Service Plan Wizard</li> <li>➤ Clone Service Plans</li> <li>➤ Group CRM Servers under Server Group</li> <li>➤ Ability to Provision Services using Separate Service Account</li> <li>➤ Selling of Services Based on Server Groups</li> <li>➤ Selling on Per Organization Basis or in Bulk</li> <li>➤ Add-on management</li> </ul>	✓
<b>DNS Handling</b>	<ul style="list-style-type: none"> <li>➤ Ability to integrate Multiple DNS Servers as Primary &amp; Secondary</li> <li>➤ Auto Generated DNS Records for CRM Organizations</li> </ul>	✓
<b>Load Balancing &amp; Redundancy</b>	<ul style="list-style-type: none"> <li>➤ Multi-tier load balanced architecture support</li> <li>➤ Supports Redundancy with Load balanced CRM Servers</li> </ul>	✓
<b>Organization Management</b>	<ul style="list-style-type: none"> <li>➤ Quick Access to Service Management</li> <li>➤ Manage CRM Organizations/Users</li> <li>➤ Enable/Disable CRM organizations</li> <li>➤ Add/Remove/Edit CRM Users</li> <li>➤ Enable/Disable CRM Users</li> <li>➤ Add/Remove Domains and Set them as Default</li> <li>➤ Manage Business Units</li> <li>➤ Put on Hold / Suspend Access to Panel for Customer/Administrator</li> </ul>	✓
<b>Reporting</b>	<ul style="list-style-type: none"> <li>➤ Auto Generate Reports</li> <li>➤ CRM SPLA Report Generation and Export to Excel Option</li> <li>➤ CRM Organization Usage Report Generation and Export to Excel Option</li> <li>➤ Separate columns for active and in-active CRM users are added to CRM usage reports.</li> <li>➤ Schedule to automatically generate and email reports to provider</li> <li>➤ CRM SPLA Report Functionality for CRM 2013 &amp; 2015 which is based on CRM 2013 &amp; 2015 CAL types.</li> </ul>	✓

## 7. Cloud Hosting through MachPanel

In addition to Traditional Hosting, Cloud hosting is a vital and powerful feature that MachPanel possesses. It allows various Enterprise solutions for broad Cloud Hosting Services that include:

- MachPanel Automation Module for Microsoft Exchange
- MachPanel Automation Module for Microsoft Skype for Business
- MachPanel Automation Module for Microsoft SharePoint
- MachPanel Automation Module for Microsoft CRM

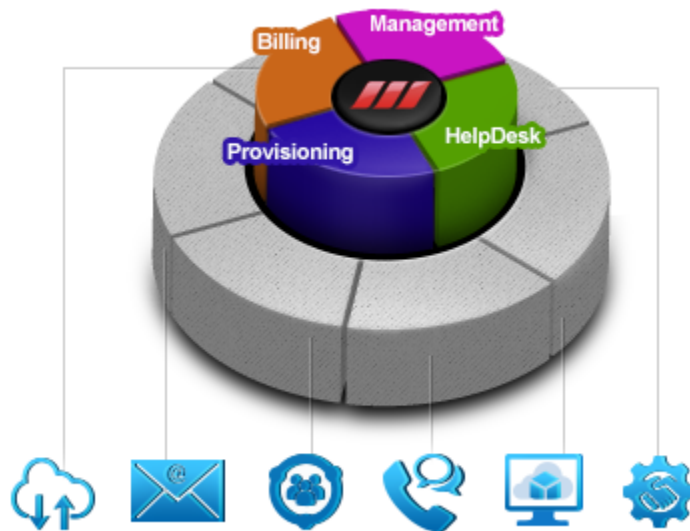
- e. MachPanel Automation Module for Microsoft Hyper-V
- f. MachPanel Automation Module for Microsoft CSP
- g. MachPanel Automation Module for Windows Work Folders
- h. MachPanel Automation Module for Microsoft RDS



## 8. MachPanel Other Products

MachPanel's other products are **MachPanel Automation Module for Microsoft Exchange, SharePoint, Skype for Business, CSP, Work Folders, RDS and Hyper-V** etc. It fully automates the service planning, billing, provisioning and management of several Traditional hosted services (Web Hosting) as well as Enterprise Hosting. Traditional hosting (also known as Shared Web & Data Hosting) is offered by **MachPanel Automation Module for Microsoft Web Hosting**.





## 9. Useful Resources

We maintain handful of useful resources to allow better support and enhance user experience with our product, making the most of it. You can utilize this supplementary information as per requirement. Just follow the mentioned links for further assistance.

No#	Documents and Guides	Links
1.	Frequently Asked Questions (FAQs):	<a href="http://kb.machsol.com/Knowledgebase/2">http://kb.machsol.com/Knowledgebase/2</a>
2.	Knowledge Base (KB):	<a href="http://kb.machsol.com/">http://kb.machsol.com/</a>
3.	Blogs:	<a href="http://blog.machsol.com">http://blog.machsol.com</a>

## 10. Contact Us

MachSol is leader in unified automation software that solves business and operational challenges in delivering scalable hosted software in private cloud, public cloud and hybrid cloud environments.

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