

Using CRM Import Utility.

Summary

This article provides information for using CRM Import Utility for importing CRM users in MachPanel.

Applies To

MachPanel Version 4.5.16 and above.

Pre Requisites

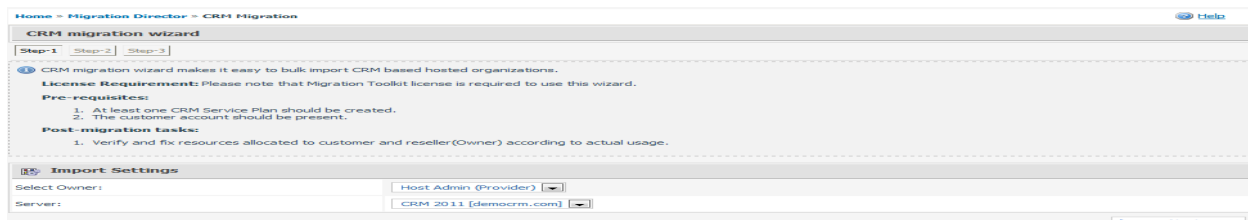
- You have purchased license from the sales team.
- At least one CRM service plan is present in MachPanel.
- Customer account has been created.
- CRM Server on which the users exist has been added in MachPanel.

Procedure

*** It is strongly recommended that to import a test organization first as a Proof of Concept.**

Please follow the below mentioned steps to bulk import CRM users:

1) Open MachPanel Control Panel, log in as Provider and navigate to **Home >> Migration Director >> CRM Migration**. In step-1 provide the Import Settings as shown in the snapshot below:



The screenshot shows the 'CRM migration wizard' interface. At the top, it says 'Home - Migration Director - CRM Migration' and 'Help'. Below that, it indicates 'Step 1' is active, with 'Step 2' and 'Step 3' also visible. The main content area contains the following text:

CRM migration wizard makes it easy to bulk import CRM based hosted organizations.

License Requirement: Please note that Migration Toolkit license is required to use this wizard.

Pre-requisites:

1. At least one CRM Service Plan should be created.
2. The customer account should be present.

Post-migration tasks:

1. Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

Below this text is the 'Import Settings' section. It has a 'Select Owner:' dropdown menu with 'Host Admin (Provider)' selected. Below that is a 'Server:' dropdown menu with 'CRM 2011 [democrm.com]' selected. At the bottom right, there is a 'Next' button.

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- Select the Owner (i.e. Provider or any Reseller).
- Select the CRM Server where the users exists.

2) In step-2 enter the customer's domain name, select the customer, associate a service plan and then click on **Next** button.

Home » Migration Director » CRM Migration [Help](#)

CRM migration wizard

Step-1 Step-2 Step-3

Select the Organization(s) you wish to import and associate them the customer and service plan.

Select Organizations

Import	CRM Organization	For Client	Associate Service Plan	Options
<input checked="" type="checkbox"/>	crm21mayabc[http://crm21mayabc.pss-lab2010.local] Domain Name: <input type="text"/> Base Currency: US Dollar Base Language: English	Customer Demo(customer@MachPanel.com)	CRM Product 1	Import
<input checked="" type="checkbox"/>	zar-test[http://zar-test.pss-lab2010.local] Domain Name: <input type="text"/> Base Currency: South Afri Base Language: English	Customer Demo(customer@MachPanel.com)	CRM Product 1	Import
<input checked="" type="checkbox"/>	sameorg1test5[http://sameorg1test5.pss-lab2010.local] Domain Name: <input type="text"/> Base Currency: US Dollar Base Language: English	Customer Demo(customer@MachPanel.com)	CRM Product 1	Import
<input checked="" type="checkbox"/>	sameorg1test[http://sameorg1test.pss-lab2010.local] Domain Name: <input type="text"/> Base Currency: US Dollar Base Language: English	Customer Demo(customer@MachPanel.com)	CRM Product 1	Import
<input checked="" type="checkbox"/>	XhangeCRM[http://XhangeCRM.pss-lab2010.local] Domain Name: <input type="text"/> Base Currency: US Dollar Base Language: English	Customer Demo(customer@MachPanel.com)	CRM Product 1	Import

3) In step-3 select billing/subscription preference for each organization and finally click on **Finish** button to import the organization in MachPanel:

Home » Migration Director » CRM Migration [Help](#)

CRM migration wizard

Step-1 Step-2 Step-3

Select the billing/subscription preference for each Organization.

Note: Please be patient after clicking finish button as the process may take some time.

Billing Information

Organization	Client	Subscription	Subscription Start Date	Billing Cycle	Payment Group
crm21mayabc[http://crm21mayabc.pss-lab2010.local]	Mark David(mark@markdavid.com)	New	6/20/2012	Monthly	USD

[Previous](#) [Finish](#)

4) You can manage this subscription by navigating to **Home >> Service Director >> CRM Hosting >> CRM Accounts**.

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MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/50317/Using-CRM-Import-Utility.>