

Creating Service Plan/Package in MachPanel

Summary

This article provide a summary for Creating a new Service Plan/Package in MachPanel.

Applies To

This article applies to MachPanel build v4.9.21 and above

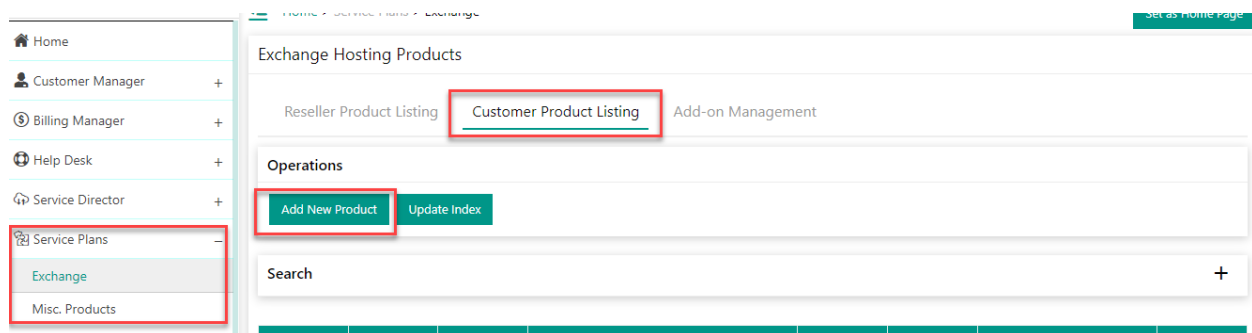
Pre-Requisite:

First of all, create **server groups** for a particular service (Shared Hosting services, Exchange services, Skype for business, CRM, VPS services, CSP etc.) so that it could be added in your service plan during creation.

Creation / Adding a Product or Service Plan:

Before selling services (Shared Hosting services, Exchange services, Lync, CRM, VPS services etc.) to customers, you have to create **service plans** for each service.

- To create a new service plan, navigate to the path: **Home >> Service Plans** or select **Product** under respective module to create Product\Plans.
- Select the desired product from the list and click on **Add New Product** button from either **Reseller Product Listing** or from **Customer Product Listing** tab as shown in the snapshot below:



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Note: Choose **Reseller Product Listing** tab only when you are selling service to a **Subscription Based\Prepaid Reseller**.

Provide Basic Information:

Fill the form under **Basic Info** tab by selecting Product type, **Provider**, Server Group, providing Product name & comments etc.

- You can also restrict the use of a specific service plan by setting it as **Inactive**.
- You can select from the drop down list other options such as **prorate billing** and **add-ons** association.

Home > Service Plans > Exchange > Add Product

Add New Product

Basic Info Resources Payment Cycles Price Group Upgrade/Downgrade Associate Add-on

Product type: Microsoft Exchange

*Product name: Test Package

Provider: Exchange Server 2016

Server group: PSS-LAB2016 - Exchange 2016

Is active: Yes

Allow prorate: Yes

Associate Add-on: Optional

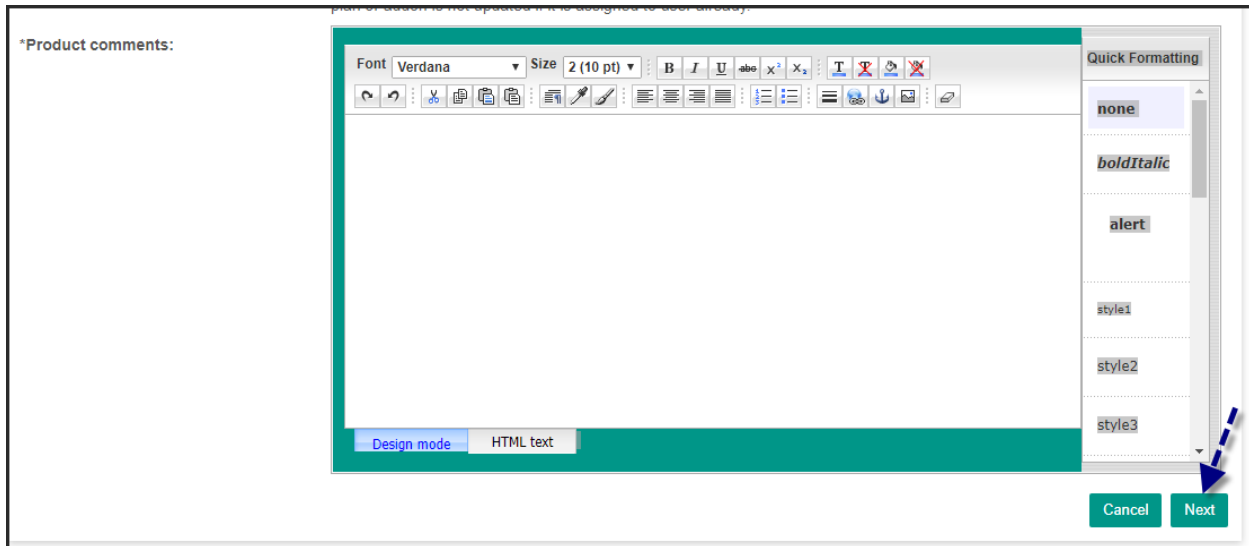
- You can also provide **education discount** package.
- You can **Sync sold plan resources** in you need to edit the Plan resources and by checking it the changed resources will be applied to existing accounts.

Associate domain:	Required
Edu-discount package:	<input type="checkbox"/>
Date:	1/8/2019
Sync sold plan resources:	<input type="checkbox"/>

Note: If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.

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- Provide Product comments with style and font. After that click on **Next** button.



Resources allocation:

In the next step, provide resources for each Service plan. The resources are different for each service for example in Exchange Hosting Products, you have to specify all the resources such as Limits, Permissions, Mailbox Storage Settings, Folder Storage Settings, Outlook Web Access Settings, Personal Archive Settings, Other restrictions and Wireless Services.

Basic Info	Resources	Payment Cycles	Price Group	Upgrade/Downgrade	Associate Add-on
Limits					
Exchange Organizations:					<input checked="" type="checkbox"/> Unlimited (Minimum 1 is required for provisioning)
No. of User/Linked Mailboxes allowed:					<input checked="" type="checkbox"/> Unlimited
No. of Resource Mailboxes allowed:					<input checked="" type="checkbox"/> Unlimited
No. of Shared Mailboxes allowed:					<input checked="" type="checkbox"/> Unlimited
No. of Distribution Lists allowed:					<input checked="" type="checkbox"/> Unlimited
No. of Contacts allowed:					<input checked="" type="checkbox"/> Unlimited
No. of Mail User allowed:					<input checked="" type="checkbox"/> Unlimited
No. of Domains allowed:					<input checked="" type="checkbox"/> Unlimited (Minimum 1 is required for provisioning)
Set Provider domain as default:		<input type="checkbox"/>			
Create email alias on provider domain:		<input type="checkbox"/>			
Customer can create Public folder:		<input checked="" type="checkbox"/>			
Customer can manage Retention policy:		<input checked="" type="checkbox"/>			
Mobile device management allowed:		<input checked="" type="checkbox"/>			
Application impersonation management allowed:		<input checked="" type="checkbox"/>			
Custom mailbox size specification allowed:		<input checked="" type="checkbox"/>			
Microsoft SPLA Type:		Enterprise Plus			

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- After choosing SPLA the permissions will be selected automatically for provided no of Users mailbox.
- Now Provide/configure **SPAM filters** options.
- In permission provide **EWS access** and **MAPI access** (RPC over HTTP, MAPI over HTTP) as per requirement.

SPAM Filters

SPAM filtration enabled for:	<input type="text"/>	Domains <input checked="" type="checkbox"/> Unlimited
SPAM Experts Archive enabled for:	<input type="text"/>	Domains <input checked="" type="checkbox"/> Unlimited
<input checked="" type="checkbox"/> Auto-enable SPAM filtering on organization creation		

Permissions

Unified Messaging allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
POP3 access allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
IMAP access allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
EWS access allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
MAPI access allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
RPC over HTTP allowed	<input checked="" type="checkbox"/>	
MAPI over HTTP allowed	<input checked="" type="checkbox"/>	
OWA/HTTP access allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
Outlook Non-Cached mode allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
Exchange ActiveSync access allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
Journaling allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
Litigation hold management allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited
In-place hold allowed on:	<input type="text"/>	MailBox <input checked="" type="checkbox"/> Unlimited

- Under **Mailbox storage settings** you have to provide the size of the mailboxes, when it exceeds the specified amount it will issue warning messages

Mailbox storage settings
When the mailbox size exceeds the indicated amount

Issue warning at (MB):	<input type="text"/>	<input checked="" type="checkbox"/> Unlimited This value should be less than OR equal to 'Prohibit Send At'
Prohibit send at (MB):	<input type="text"/>	<input checked="" type="checkbox"/> Unlimited This value should be less than OR equal to 'Prohibit Send and Receive At'
Prohibit send and receive at (MB):	<input type="text"/>	<input checked="" type="checkbox"/> Unlimited

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- You can choose the Public Folder storage.

Folder storage settings		
When the mailbox size exceeds the indicated amount		
Public Folders:	<input checked="" type="checkbox"/> Unlimited	
When public folder size exceeds the indicated amount	<input checked="" type="checkbox"/> Unlimited	
Issue warning at (MB):	<input checked="" type="checkbox"/> Unlimited	
Prohibit post at (MB):	<input checked="" type="checkbox"/> Unlimited	
Maximum item size (MB):	<input checked="" type="checkbox"/> Unlimited	

- The Outlook Web Access OWA setting will be also applied as per number of mailboxes and the SPLA type.

Outlook Web Access settings		
OWA all address lists enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA calendar enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA contacts enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA change password enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA journal enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA tasks enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA sticky notes enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA premium client enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA reminder and notifications enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA spell checker enabled on:	160	MailBox <input type="checkbox"/> Unlimited

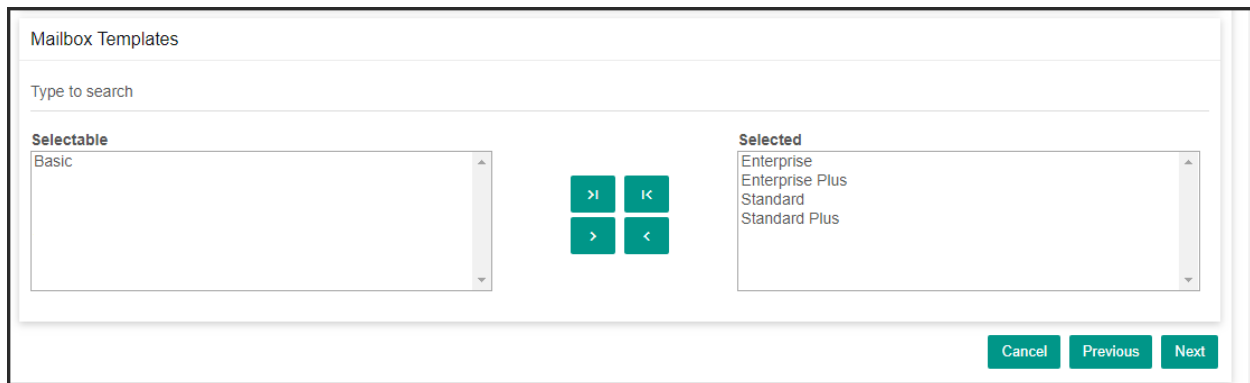
OWA search folders enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA signatures enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA junk mail enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA theme selection enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA UM integration enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA ActiveSync Enabled on:	160	MailBox <input type="checkbox"/> Unlimited
OWA PublicFolder enabled on:	160	MailBox <input type="checkbox"/> Unlimited
Outlook License Enabled on:	0	MailBox <input type="checkbox"/> Unlimited

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Assigning Mailbox Templates:

Select Mailbox templates as shown below. You can review following KB article to create a new Exchange Mailbox Template:

<http://kb.machsol.com/Knowledgebase/Article/51372>

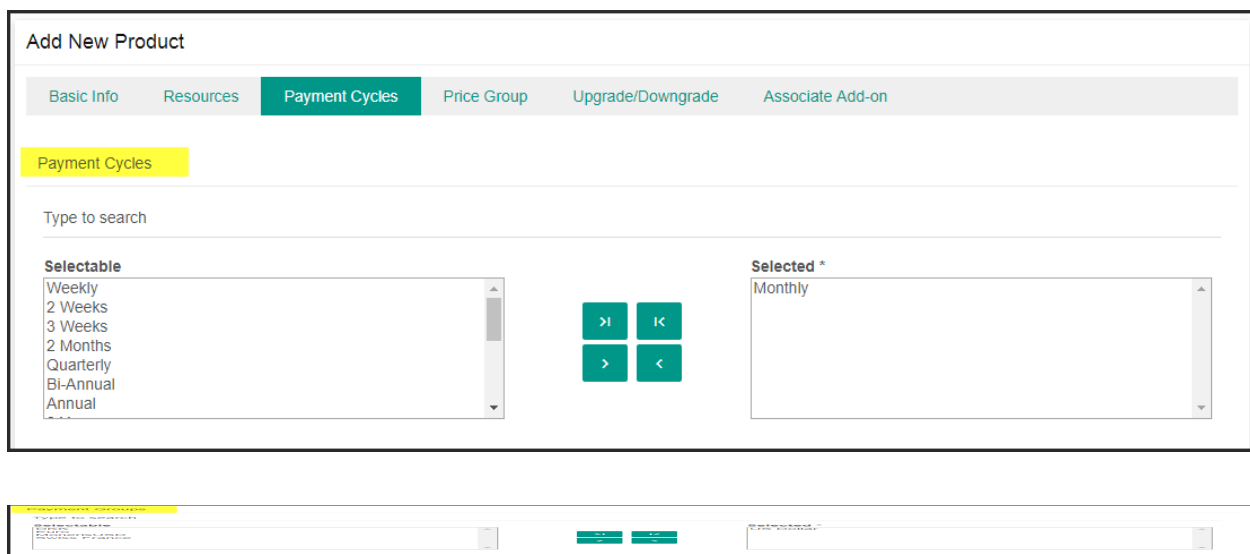


The screenshot shows the 'Mailbox Templates' selection interface. It features a search bar labeled 'Type to search'. Below the search bar, there are two columns: 'Selectable' and 'Selected'. The 'Selectable' column contains a list with 'Basic' selected. The 'Selected' column contains a list with 'Enterprise', 'Enterprise Plus', 'Standard', and 'Standard Plus' selected. Between the columns are four green buttons: '>|', '|<', '>', and '<'. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Next'.

Note: If you don't want to use templates, please leave this section empty for the Reseller Product Plans\Customer Product Plans

Defining Payment Cycles:

Select Payment Cycles and Payment Groups and click on **Next** button to proceed.



The screenshot shows the 'Add New Product' interface. It has a navigation bar with tabs: 'Basic Info', 'Resources', 'Payment Cycles', 'Price Group', 'Upgrade/Downgrade', and 'Associate Add-on'. The 'Payment Cycles' tab is active. Below the navigation bar, there is a search bar labeled 'Type to search'. Below the search bar, there are two columns: 'Selectable' and 'Selected *'. The 'Selectable' column contains a list with 'Weekly', '2 Weeks', '3 Weeks', '2 Months', 'Quarterly', 'Bi-Annual', and 'Annual'. The 'Selected *' column contains a list with 'Monthly' selected. Between the columns are four green buttons: '>|', '|<', '>', and '<'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'.

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Setup Price for Product:

Set a price for your product plan. Click on **Next** button when done.

Home > Service Plans > Exchange > Add Product

Add New Product

Basic Info Resources Payment Cycles **Price Group** Upgrade/Downgrade Associate Add-on

Price Group	Payment Cycles	Setup Price	Price	Discount
US Dollar	Monthly	USD 1,000.00	USD 500.00	0%

Cancel Previous Next

Upgrade/Downgrade:

You can also upgrade/downgrade your existing product. See the following KB article for How to Upgrading a service plan, resources, creating and selling add-ons.

<http://kb.machsol.com/Knowledgebase/Article/50348>

Add New Product

Basic Info Resources Payment Cycles Price Group **Upgrade/Downgrade** Associate Add-on

Product May Upgrade To:

Type to search

Selectable

- Exchange 2016 Basic Plan (PR)
- Exchange 2016 Standard Plan (PR)

Selected

- Exchange 2016 Enterprise Plan (PR)
- Exchange 2016 Enterprise Unlimited (PR)

>| <|

> <

Product May Downgrade To:

Type to search

Selectable

- Exchange 2016 Enterprise Plan (PR)
- Exchange 2016 Enterprise Unlimited (PR)
- Exchange 2016 Standard Plan (PR)

Selected

- Exchange 2016 Basic Plan (PR)

>| <|

> <

Cancel Previous Next

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Associate Add-on:

You can associate add-ons in this step if any. See our KB article for [How to create and provision an Add-on](#).

Click on **Finish** button to add a new product.

The screenshot shows the 'Add New Product' interface in MachPanel, specifically the 'Associate Add-on' step. The interface is divided into several sections:

- Navigation Tabs:** Basic Info, Resources, Payment Cycles, Price Group, Upgrade/Downgrade, and Associate Add-on (highlighted).
- Search:** A search bar with the placeholder text 'Type to search'.
- Selectable:** A list box on the left, currently empty.
- Selected:** A list box on the right containing two items: 'Exchange 2016 500MB (PC)' and 'Exchange 2016 500MB (PR)'. A blue dashed arrow points from this list to the 'Finish' button.
- Navigation Buttons:** Four buttons in the center: '>|', '|<', '>', and '<'. At the bottom right, three buttons: 'Finish', 'Cancel', and 'Previous'.

MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/52399/Creating-Service-PlanPackage-in-...>