

Service Management of CRM in MachPanel

Summary

This article provides a summary on CRM services management i.e. adding domains, managing CRM organizations, and adding \ managing Users etc. in MachPanel.

Applies To

This article applies to MachPanel all versions.

Pre-Requisites:

Before you can manage services of CRM you need to Integrate CRM With MachPanel Control Panel. Please review the below KB article:

<http://kb.machsol.com/Knowledgebase/Article/50277>

Service Management of CRM Hosting:

Hosted CRM activates rich web based interface for the management of hosted CRM service. Using the web interface the provider and the end-user may perform routine management task without the need of going at the CRM server or active directory.

In order to manage services of the CRM accounts, navigate to the path: **Home >> Service Director >> CRM Hosting >> CRM Accounts**

Click on **Service Management** link in front of the CRM account for which you want to manage CRM Services.

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General Settings:

You can view general and service info for CRM account. You can synchronize business units by clicking on the link in front of Sync Business Unit.

The screenshot shows the 'Manage Service' page for a CRM account. The breadcrumb trail is 'Home > Service Director > CRM Hosting > CRM Accounts > Manage Service'. The page title is 'Manage #41 - GlobalData'. There are six tabs: 'General Settings' (highlighted with a red box), 'CRM Organization', 'Domains', 'Business Units', 'Users', and 'Group Actions'. The 'General' section contains the following information:

Subscription ID:	#41 - GlobalData
Customer:	#174 Chris Jordan
Sync Business Units:	Click to Sync Business Units
Sync users:	Click to Sync Users
Service Type:	Microsoft Dynamics CRM
Package:	FiveCRMUser
Product comments:	FiveCRMuser
Sign Up Date:	1/8/2018
Last Renewal:	1/8/2018
Next Renewal:	2/8/2018

On the right, the 'Subscriptions Limits' section shows two progress bars: 'CRM Organization: 1/2' and 'No. of Users allowed: 2/5'.

CRM Organization:

You can view the CRM organization information under the **CRM Organization** tab and connect to organization by clicking on the *Connect To CRM Organization* link as shown in the snapshot below:

The screenshot shows the 'Manage Service' page with the 'CRM Organization' tab selected (highlighted with a red box). The breadcrumb trail is 'Home > Service Director > CRM Hosting > CRM Accounts > Manage Service'. The page title is 'Manage #41 - GlobalData'. There are six tabs: 'General Settings', 'CRM Organization' (highlighted), 'Domains', 'Business Units', 'Users', and 'Group Actions'. The 'CRM Organization' section contains the following information:

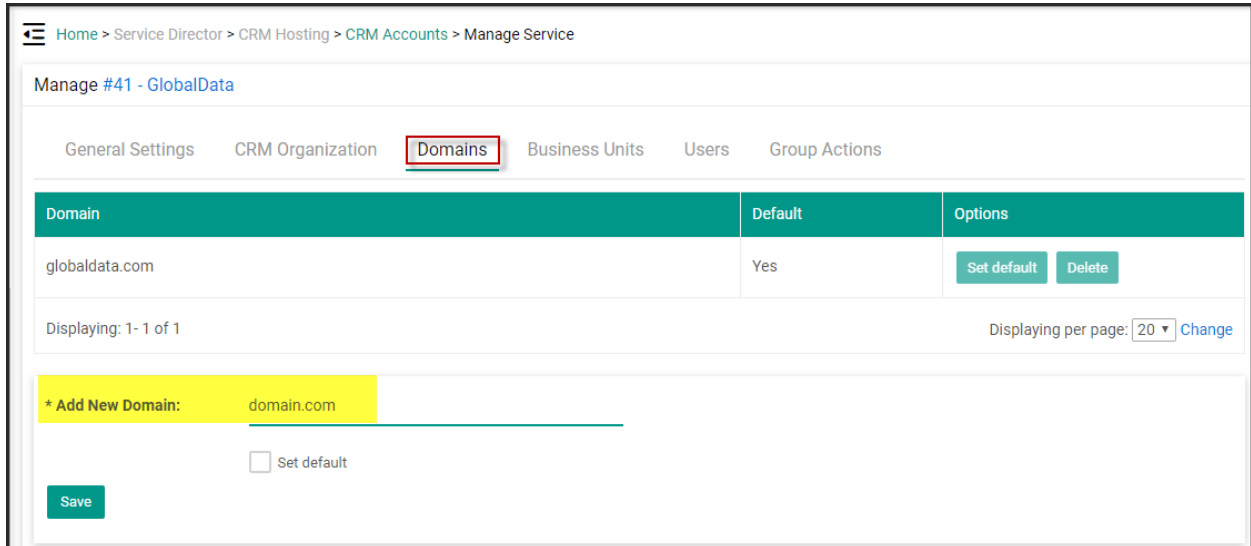
Domain Name:	globaldata.com
Title:	GlobalData
URL:	https://GlobalData.machsol.com
Manager:	crm admin
Manager Email:	admin@yahoo.com
Status:	Enabled
CRM:	Connect To CRM Organization

A blue dashed arrow points to the 'Connect To CRM Organization' button.

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Domains:

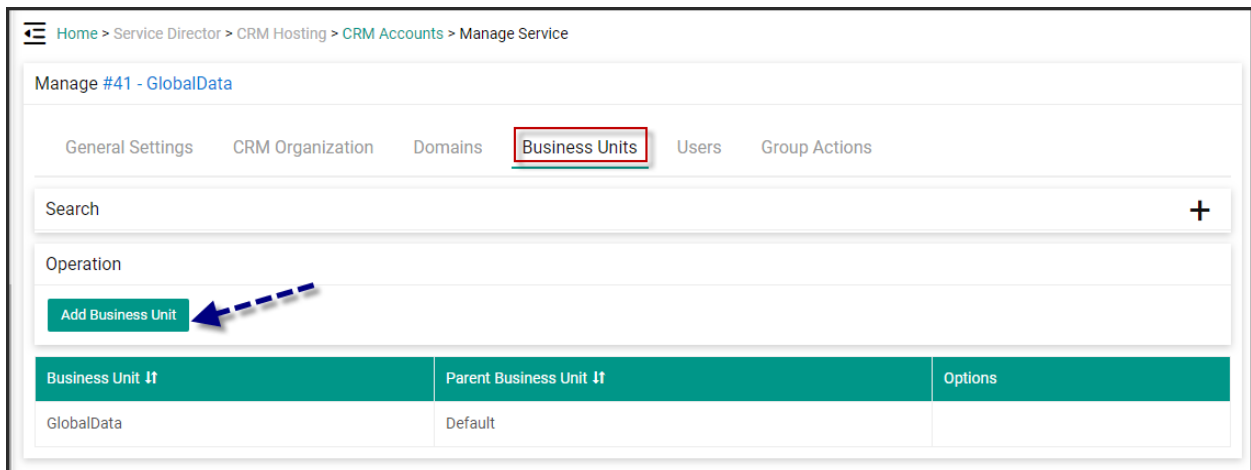
You can view and add new domains under the **Domains** tab.



The screenshot shows the 'Manage #41 - GlobalData' page with the 'Domains' tab selected. The breadcrumb trail is 'Home > Service Director > CRM Hosting > CRM Accounts > Manage Service'. The navigation tabs are 'General Settings', 'CRM Organization', 'Domains', 'Business Units', 'Users', and 'Group Actions'. A table lists the domain 'globaldata.com' with a 'Default' status of 'Yes' and 'Set default' and 'Delete' buttons. Below the table, it says 'Displaying: 1- 1 of 1' and 'Displaying per page: 20 Change'. At the bottom, there is a form to 'Add New Domain' with the input 'domain.com', a 'Set default' checkbox, and a 'Save' button.

Business Units:

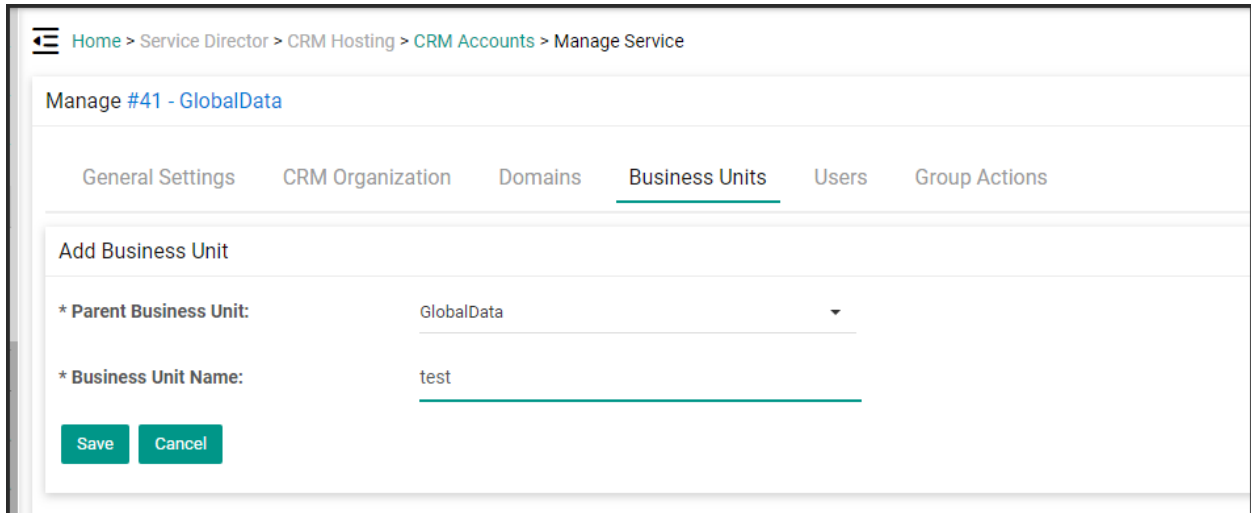
To add a new business unit to CRM click on **Add Business Unit** button under **Business Units** tab as shown in the snapshot below:



The screenshot shows the 'Manage #41 - GlobalData' page with the 'Business Units' tab selected. The breadcrumb trail is 'Home > Service Director > CRM Hosting > CRM Accounts > Manage Service'. The navigation tabs are 'General Settings', 'CRM Organization', 'Domains', 'Business Units', 'Users', and 'Group Actions'. There is a search bar and an 'Add Business Unit' button highlighted with a blue dashed arrow. Below, a table shows a business unit 'GlobalData' with a 'Parent Business Unit' of 'Default' and an 'Options' column.

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To add a new business unit, select parent business unit, provide business unit name and click **Save** when done.



Home > Service Director > CRM Hosting > CRM Accounts > Manage Service

Manage #41 - GlobalData

General Settings CRM Organization Domains **Business Units** Users Group Actions

Add Business Unit

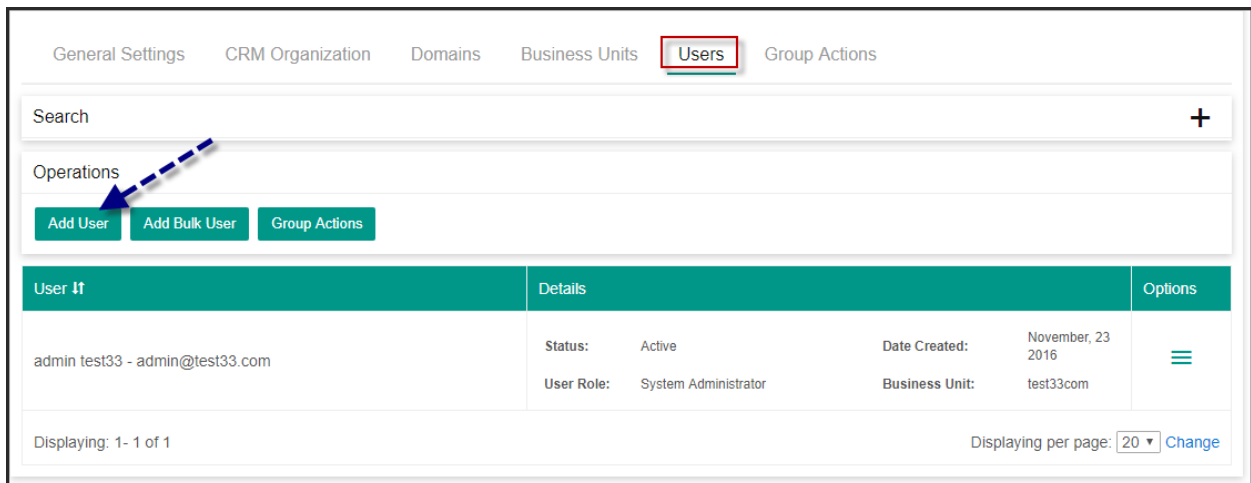
* Parent Business Unit: GlobalData

* Business Unit Name: test

Save Cancel

Users:

You can view and add user to the CRM organization. Click on **Add User** or **Add Bulk User** button to add a new user or import bulk user to CRM account. See the snapshot below:



General Settings CRM Organization Domains Business Units **Users** Group Actions

Search +

Operations

Add User Add Bulk User Group Actions

User ID	Details	Options
admin test33 - admin@test33.com	Status: Active Date Created: November, 23 2016 User Role: System Administrator Business Unit: test33com	☰

Displaying: 1- 1 of 1

Displaying per page: 20 Change

To add a new CRM user, provide the necessary fields such as user, account mode, CAL type, Business unit, email etc. See the snapshot below:

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User Role:

Type to search

Selectable		Selected
Salesperson	> <	Support User
Schedule Manager	> <	
Scheduler		
System Administrator		
System Customizer		
Vice President of Marketing		
Vice President of Sales		

* **Email:** user1@emailaddress.com

* **Password:**
(Must be alpha-numeric. Example: 1PassW0rD)

Show Password

* **Confirm password:**

Notes:

Send Email:

MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/53414/Service-Management-of-CRM-in-Mac...>