

# 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.

# Service Management of CRM in MachPanel

## 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.

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

Manage #41 - GlobalData

General Settings CRM Organization Domains Business Units Users Group Actions

General

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

Subscriptions Limits

CRM Organization: 1/2

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:

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

Manage #41 - GlobalData

General Settings CRM Organization Domains Business Units Users Group Actions

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](#)

# Service Management of CRM in MachPanel

## 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 tabs are 'General Settings', 'CRM Organization', 'Domains' (highlighted with a red box), 'Business Units', 'Users', and 'Group Actions'. A table lists domains with columns 'Domain', 'Default', and 'Options'. The first row shows 'globaldata.com' as the default domain. Below the table, there is a form to 'Add New Domain' with a text input field containing 'domain.com', a 'Set default' checkbox, and a 'Save' button. The page also shows 'Displaying: 1- 1 of 1' and 'Displaying per page: 20 Change'.

Domain	Default	Options
globaldata.com	Yes	<button>Set default</button> <button>Delete</button>

Displaying: 1- 1 of 1      Displaying per page: 20 Change

\* Add New Domain:  ☐ Set default Save

## 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 tabs are 'General Settings', 'CRM Organization', 'Domains', 'Business Units' (highlighted with a red box), 'Users', and 'Group Actions'. Below the tabs is a search bar and an 'Add Business Unit' button, which is pointed to by a blue dashed arrow. Below this is a table with columns 'Business Unit #1', 'Parent Business Unit #1', and 'Options'. The first row shows 'GlobalData' as the parent business unit. The page also shows a '+' icon in the top right corner of the search bar.

Search +

Operation

Add Business Unit

Business Unit #1	Parent Business Unit #1	Options
GlobalData	Default	

## Service Management of CRM in MachPanel

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:



## Service Management of CRM in MachPanel

User Role:

Type to search

Selectable

Salesperson  
Schedule Manager  
Scheduler  
System Administrator  
System Customizer  
Vice President of Marketing  
Vice President of Sales

>|

|<

>

<

Selected

Support User

\* Email

user1@emailaddress.com

\* Password:

.....

Generate Random

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

☐ Show Password

\* Confirm password:

.....

Notes:

Send Email:

☐

Save

Cancel

MachPanel Knowledgebase

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