

# CRM for Outlook - Portal Guide

This guide explains the steps in Boyum Portal that is related to managing CRM for Outlook subscriptions. For the rest of the portal functionality (purchase and customer information management) please check the portal manual.

## Getting a login

If you are partner but others in the company, have access to the portal you can ask them to make you a portal user. If you company do not have any access then please contact [sales@boyum-it.com](mailto:sales@boyum-it.com)

## Login

- Go to <https://portal.boyum-it.com>
- Enter your provided username/password
  - o (If you forgot you password use the forgot password feature.
    - NB: It is not possible to ask for your password in Boyum IT Support. This is for your security)

## Dashboard

Once logged in you see the following

The screenshot shows the Boyum Portal dashboard. On the left, there is a navigation menu with the following items: Customers, Purchase Products, Renew Maintenance, Trial for New Customer (highlighted with a red box), CRM for Outlook Users, Portal Users, Customer Portal Users, Company Data, Coupons, Orders, Invoices, Marketing Tools, and Links. The main content area is titled 'Welcome to the new Boyum Portal' and includes the following sections:

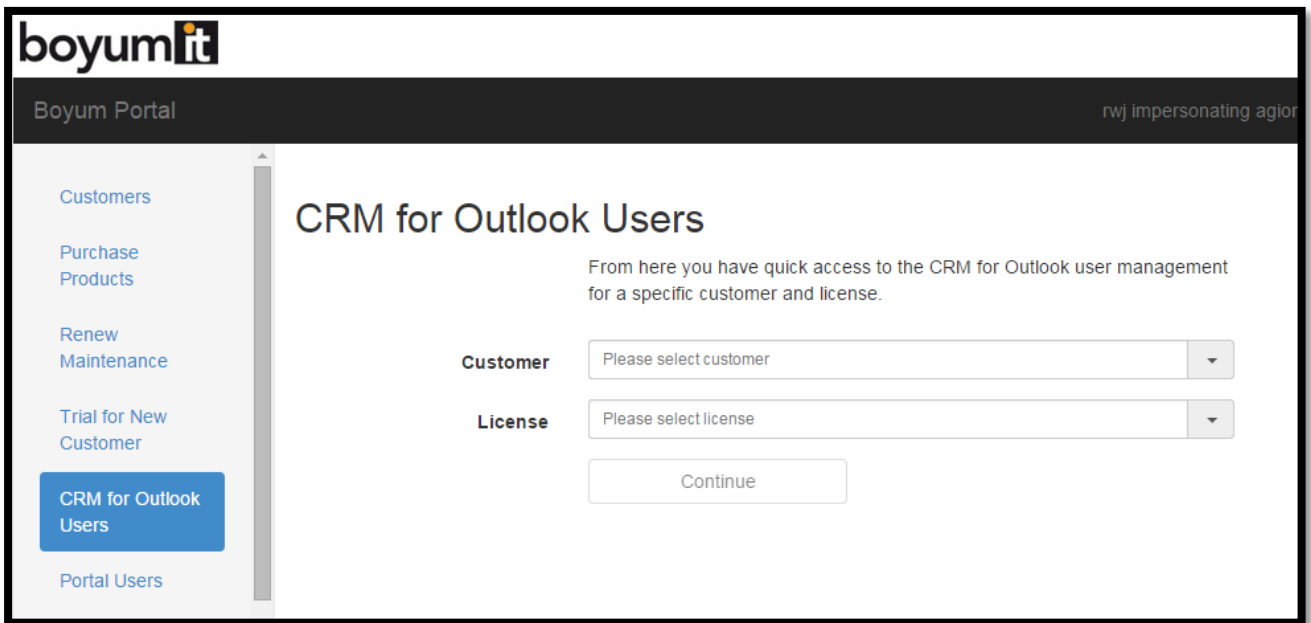
- Partnering with Boyum made Easy**  
We are very happy to introduce you to our new Boyum Portal, which will include new automatic web-based ordering
- Everything you need is available - when you need it:**
  - Clear overview of your current customers running Boyum software
  - Order new software
  - Renew Maintenance, simply paying with credit card
  - Access Marketing Materials, Logos and Presentations for educational and promotional needs
- Documentation:**
  - English
  - Español
  - German
  - Português
- Support:**
  - If you have problems with the data shown in the Boyum Portal, please contact [Boyum IT Sales](#)
  - If you have problems with the Boyum Portal, please contact [Boyum IT Support](#)
- See the short introduction video to the Boyum Portal**  
A video player with a play button icon is shown below this section.

You have the following options related to CRM for Outlook

Trial for New customer	Here you create a new trial license for new potential customer. Once created you are taken to the subscription screen. <b>NB: Only for new customers. If you need a new internal test subscription then please contact <a href="mailto:sales@boyum-it.com">sales@boyum-it.com</a> and have them activate a new test license.</b>
CRM for Outlook User	Here you manage you own/you customers CRM for Outlook subscriptions
Portal Users	Here you can create logins your colleagues so they also can manage the CRM for Outlook subscriptions.
Customer Portal Users	If you wish to grant your end-user access to also manage their own CRM for Outlook subscription you can add them here.

## Managing CRM for Outlook subscriptions

When you press the “CRM for Outlook users” menuitem the first thing you need to do is select what CRM subscription you wish to manage.



First select the customer and secondly select the License/Subscription (most customer will only have one and in that case it is pre-selected). Once selected you will see the following:

## CRM for Outlook Users

### Customer and License

<b>Customer</b>	Boyum IT A/S
<b>Product and Edition</b>	CRM for Outlook Standard
<b>Period</b>	6/30/2014 - 12/31/2015
<b>Users</b>	5 <span style="color: red;">(1)</span>
<b>Server Version</b>	1.0.29
<b>API Key</b>	e4e8840c-8cf2-4e00-824d-b62b9cd1a4ad

### Setup

To get started first install the [B1Connector](#) on the customer server. Next download the publisher profile and import it into the B1Connector. When you create users they will get the download link for the client in the activation email.

Download publisher profile (2)

**Last Download** Unknown

Create New (3)

User Groups » (4)

Name <span style="color: red;">(5)</span>	Email	User Group	Activation email sent	
rwj@boyum-it.com	<a href="mailto:rwj@boyum-it.com">rwj@boyum-it.com</a>	Default	5/24/2015 11:24:09 AM	<div style="display: flex; gap: 5px;"> <span>✎</span> <span>✖</span> <span>✉</span> </div> <span style="color: red;">(6) (7) (8)</span>
User 2	<a href="mailto:user2@boyum-it.com">user2@boyum-it.com</a>	Default		<div style="display: flex; gap: 5px;"> <span>✎</span> <span>✖</span> <span>✉</span> </div>

1	Number of users in the subscription
2	Download subscription (to begin server installation)
3	Create new user
4	Manage usergroups (permissions and DB access)
5	Email addresses set up to be able to use CRM for Outlook (each count as a user)
6	Press to manage an email's details
7	Remove user if you do not need it anymore
8	Send activation mail to user to get going in using the product

NB: You should not begin to create usergroups until server-component is installed and configured as it will update the portal with information about databases and server versions

### Download subscription

The first thing you need to do with a new subscription is:

- Download the server component installed
- Download the Publisher file
- Install the Server-component and configure it.

Manage usergroups

## User Groups

[Create New](#)

Search:

Name	All Databases	All Permissions	
Default	Yes	Yes	

[Back to list](#)

In here you can create usergroups to assign the different users. A usergroup are used to determine the permissions of the user (What SAP databases (if multiple) and what permissions in the client the user should have). By default there is a single “Default” usergroup that grant access to all permissions and all databases.

If you create/edit a user-group you see the following

## Edit usergroup

**Name**

**Description**

All permissions

All databases

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You can either set permissions to be all or something specific

All permissions

**If you uncheck all permission and save you see this:**

All Permissions

Permissions	Available	Selected
	Add >	< Remove
	<ul style="list-style-type: none"> <li>Create Absence</li> <li>Create Activity</li> <li>Create Business Partners</li> <li>Create Contact Person</li> <li>Create Customers</li> <li>Create Leads</li> <li>Create Sales Opportunity</li> <li>Create Service Call</li> <li>Create Suppliers</li> <li>Create Tracking</li> <li>Link Contact</li> <li>Update Business partner</li> </ul>	

All databases

If you uncheck all databases and save you see the defined databases from the server install:

All Databases

Databases

Available	Selected
<p>Add &gt;</p> <p>OEC Computers - DemoData</p>	<p>&lt; Remove</p>

### Add new user

Here you can create a new user (an email that need access to the functionality)

#### User

Name

Email

User Group

Send Activation Email

As part of the creation you can set the user-group and send the activation email to the end-user so they can begin (You can later resend the mail if needed)