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

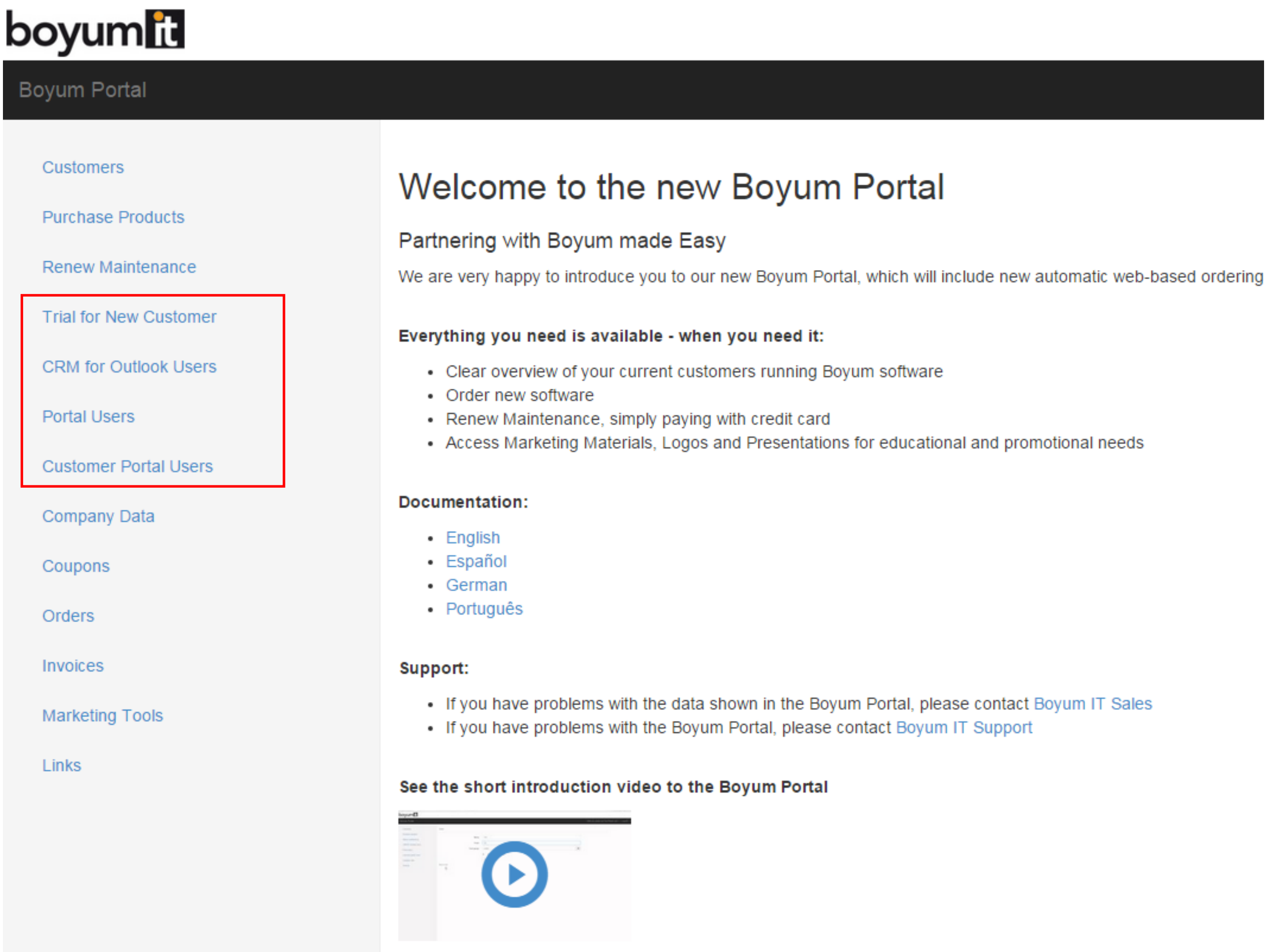
If you are partner but others in the company, have access to the portal you can ask them to make you a portal user. If you company do not have any access then please contact sales@boyum-it.com

Login

- Go to https://portal.boyum-it.com
- Enter your provided username/password
    - (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

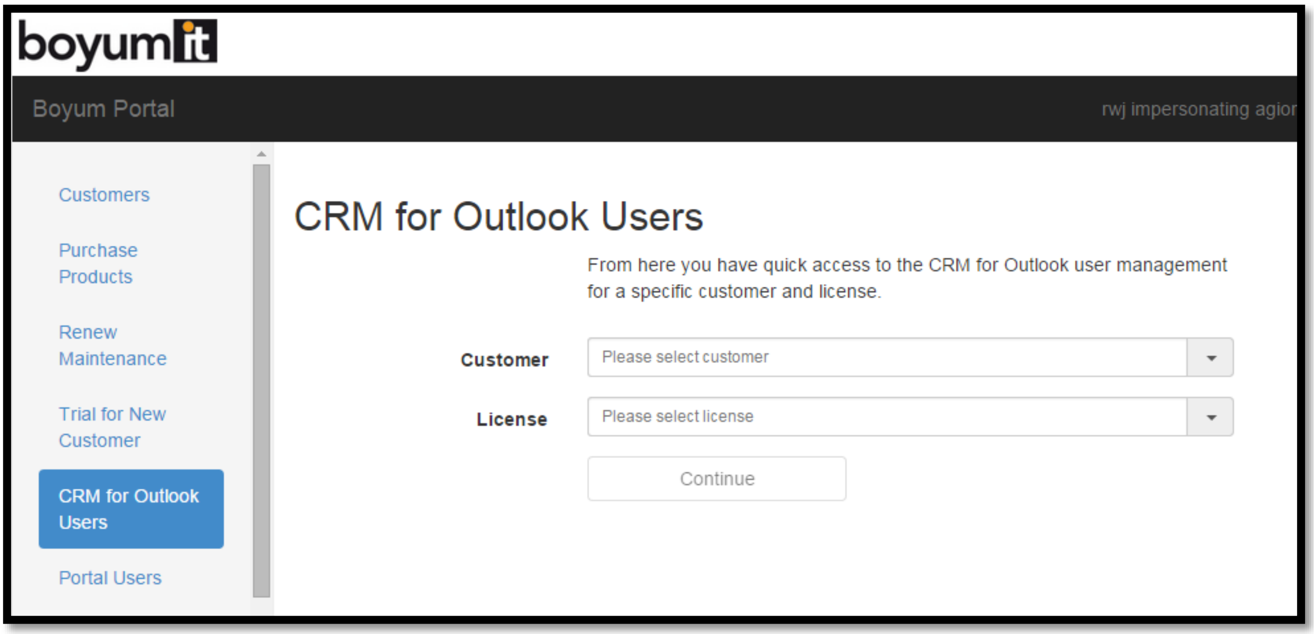


You have the following options related to CRM for Outlook

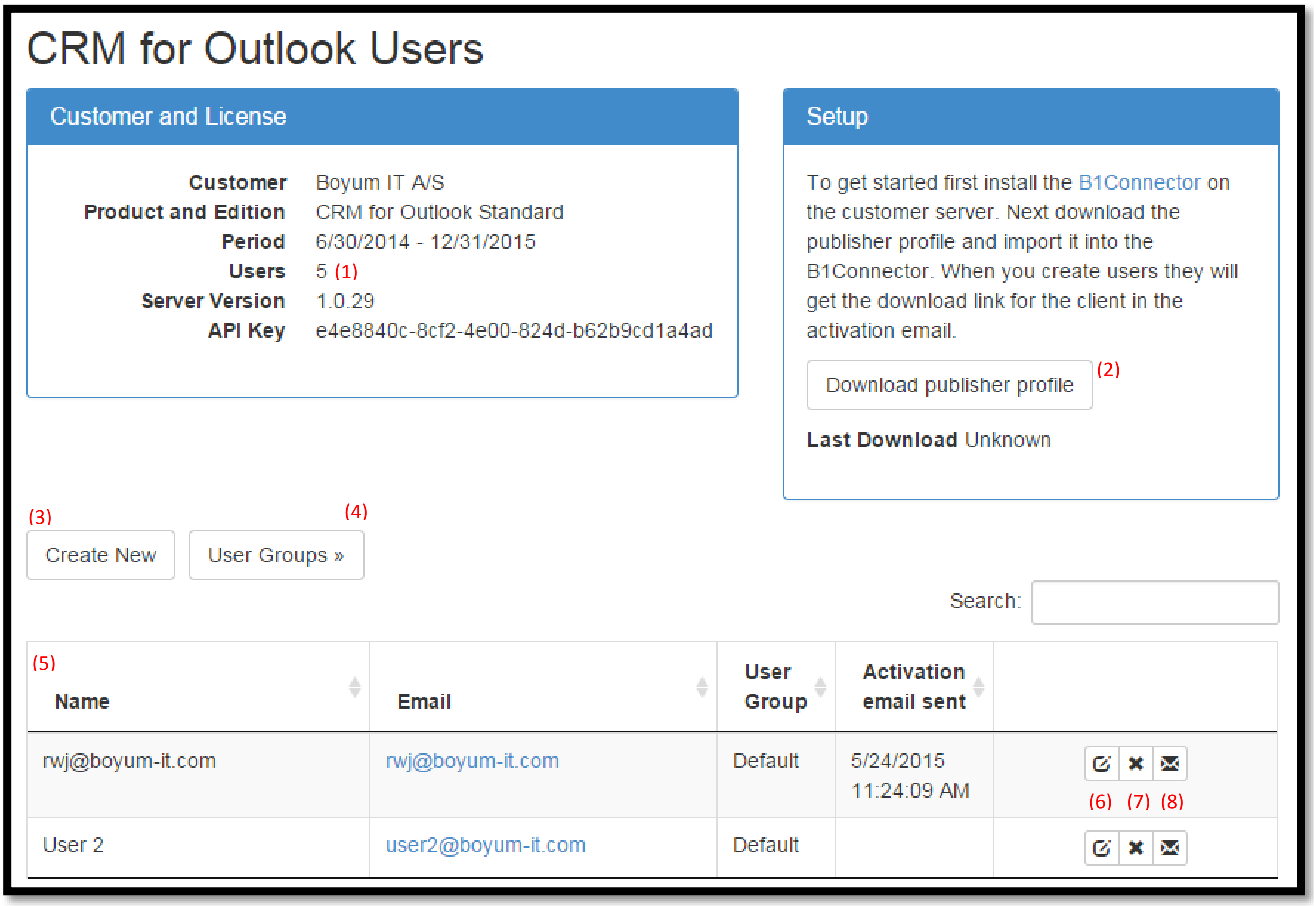
Trial for New customer	Here you create a new trial license for new potential customer. Once created you are taken to the subscription screen. NB: Only for new customers. If you need a new internal test subscription then please contact sales@boyum-it.com and have them activate a new test license.
CRM 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:



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

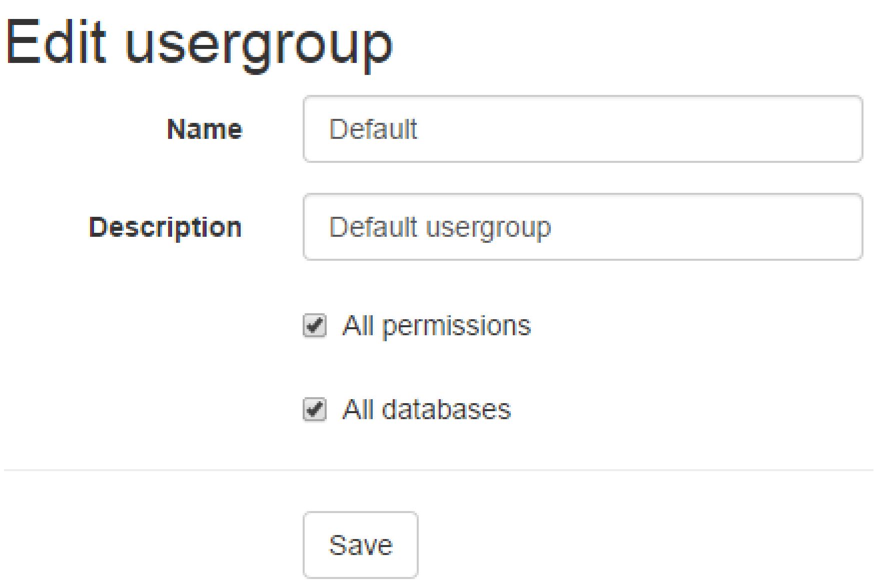
The first thing you need to do with a new subscription is:

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

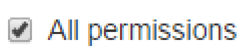
Manage usergroups

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.

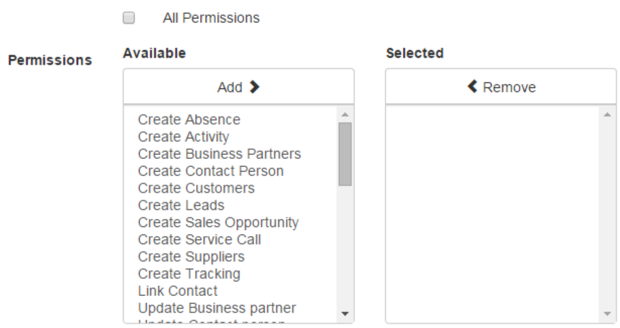
If you create/edit a user-group you see the following



You can either set permissions to be all or something specific



If you uncheck all permission and save you see this:



<table>
<tr>
<td>
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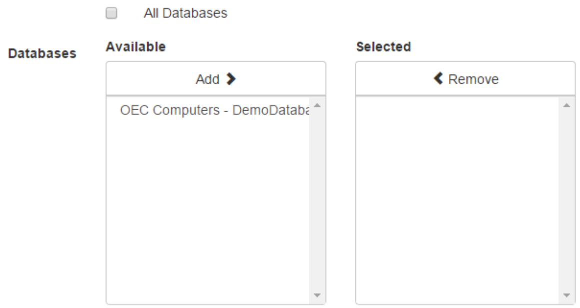
<td>If you uncheck all databases and save you see the defined databases from the server install:

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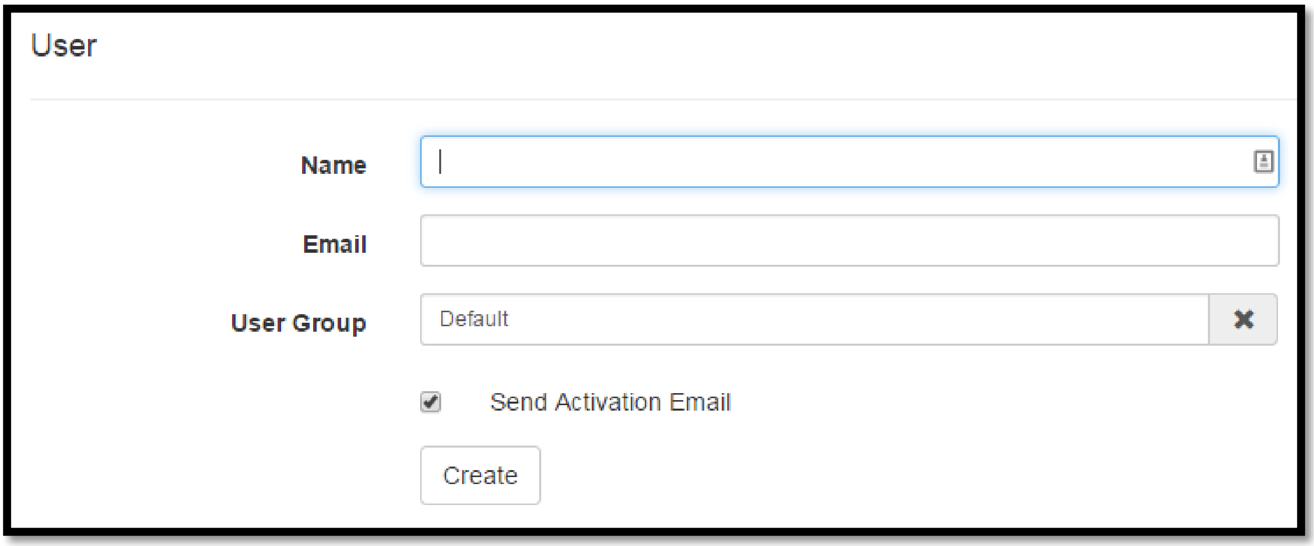
Add new user

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



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)