



**Dynamics 365 / CRM Platform**



# User Guide



**CRM Versions Supported: 2013/2015/2016/D 365**

NotePro adds enhanced capability that resembles Microsoft Word or Note to any standard or custom CRM Entity form. It's a self-install set-up. CRM Notes improves capturing all kinds of Notes in CRM with improved visual formatting of styles & fonts.

Coding Version : 1.0.0.0  
Document Version : 1.0.0.0  
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## License Key

- To install NotePro solution, you will require License key, which you can get by sending an email Request to [salesteam@mtccrm.com](mailto:salesteam@mtccrm.com) with your Organization Unique name.
- To access your Organization Unique name click on **Settings→Customizations→Developer Resources** as shown below figure.

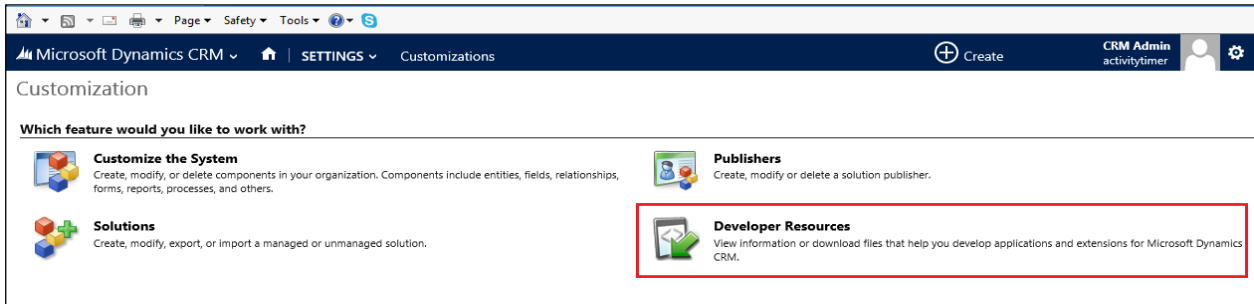


Figure 1: Developer Resources

- A window will pop up with Organization Unique Name as shown below.

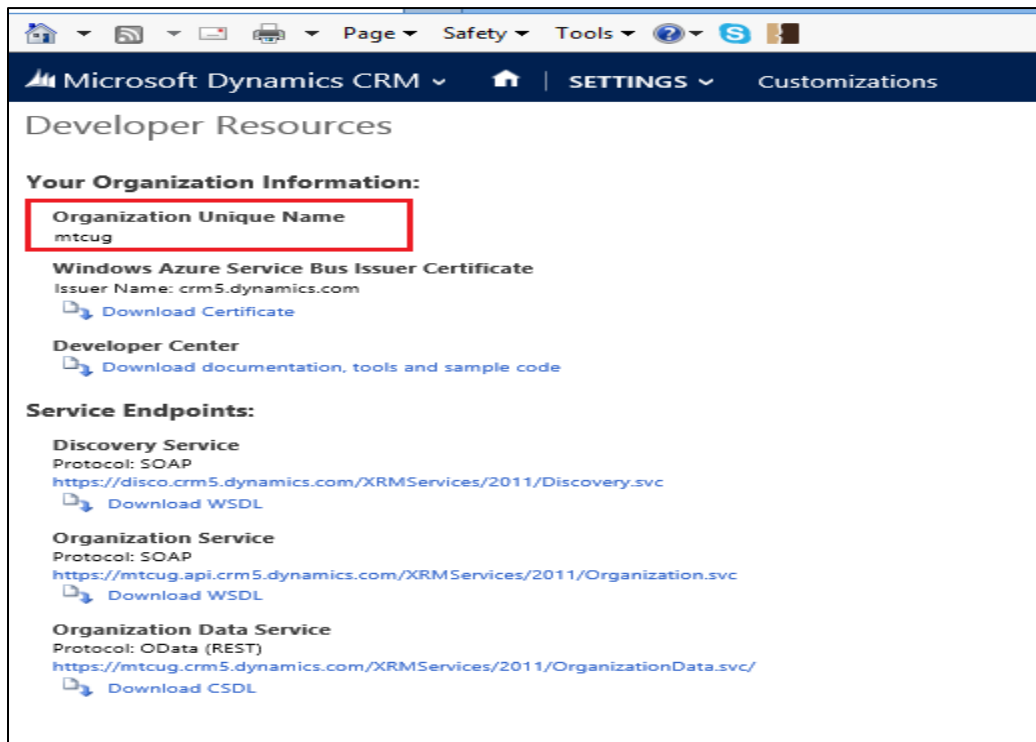


Figure 2 : Organization Unique Name

**NOTE: After placing the request you will receive the LICENSE KEY within 24 hrs.**

## Installation

To install the NotePro solution, the following steps are to be followed

### STEP 1:

- Go to <http://www.dynamicsexchange.com/Note.aspx> and click on Download to get Solution.

### STEP 2:

- On Downloading the solution, you will get **NotePro Solution.zip** (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.



NotePro\_1\_0\_0\_0\_managed.zip



Licensing\_1\_0\_3\_0\_managed.zip

NOTE: For installation, the **Solution** need to be imported into CRM

### STEP 3:

- Open your CRM click on **Settings→Solution→Import** it will open import Solution window.

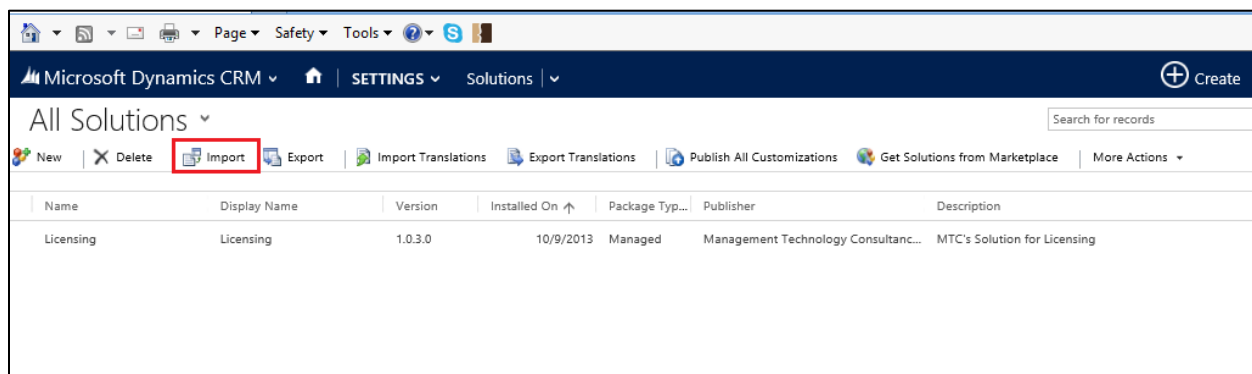


Figure 3: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

## Installing Licensing Solution

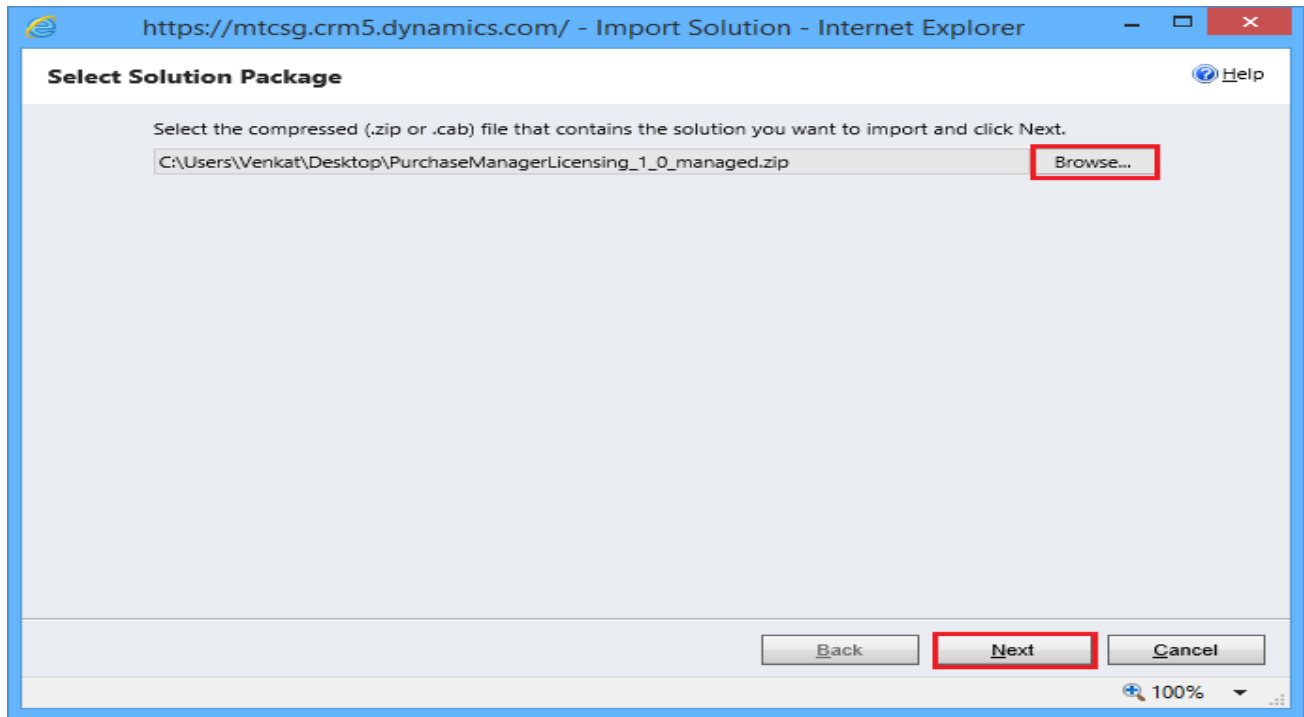


Figure 4 : Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

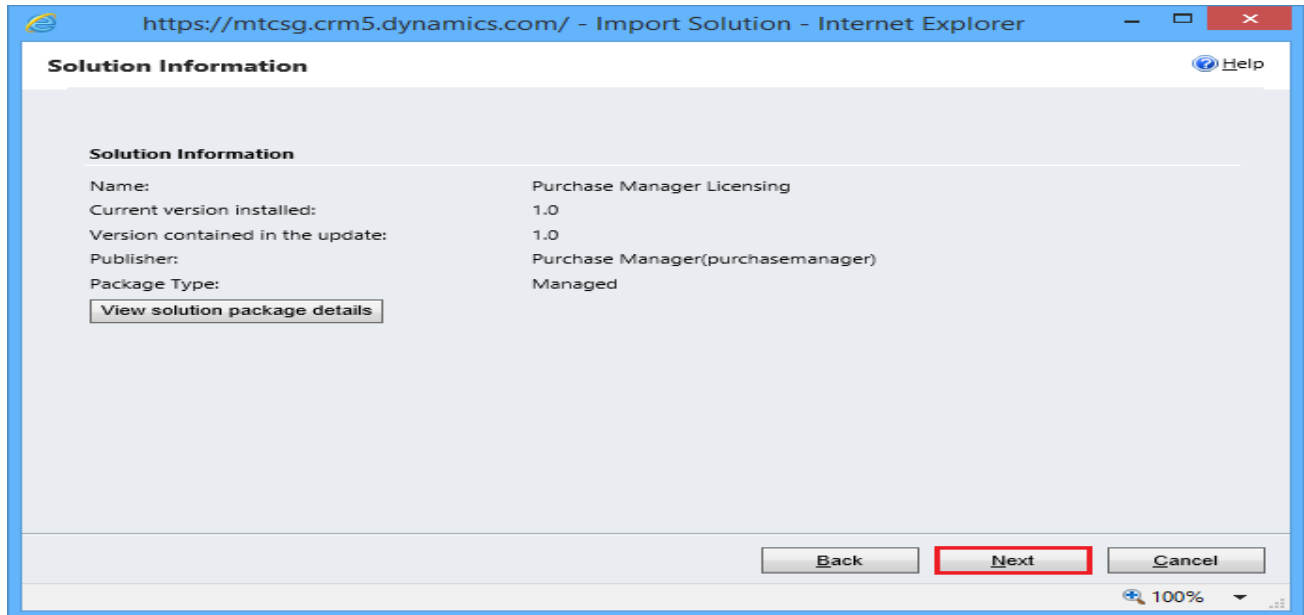


Figure 5: Importing Options window

- Click on Next to proceed.

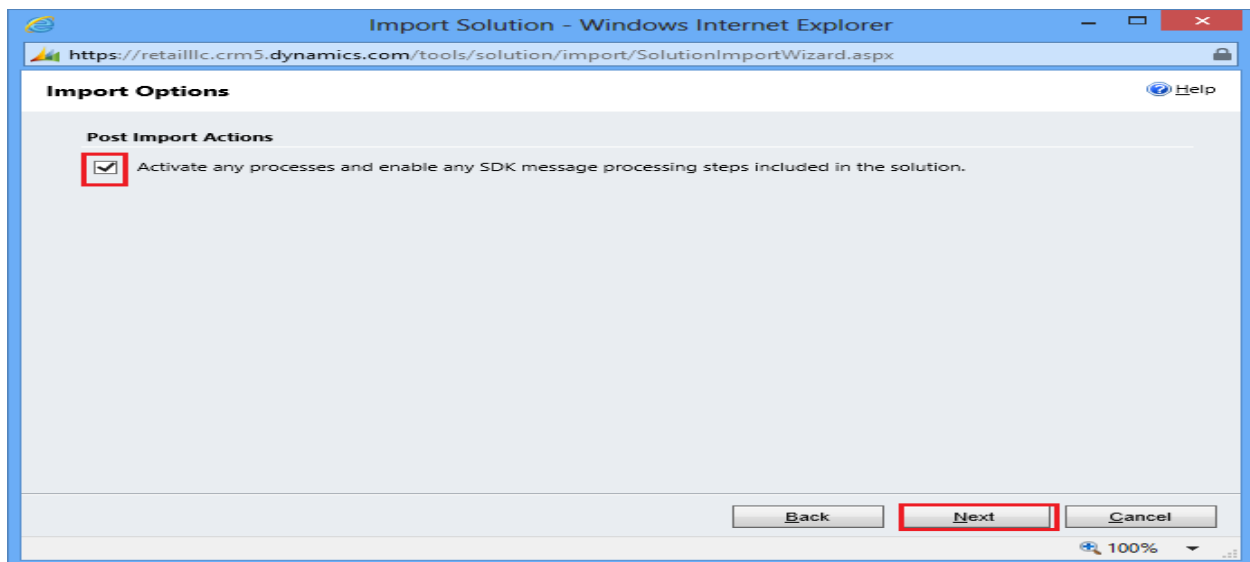


Figure 6: Import Option

- Click on Next to proceed.



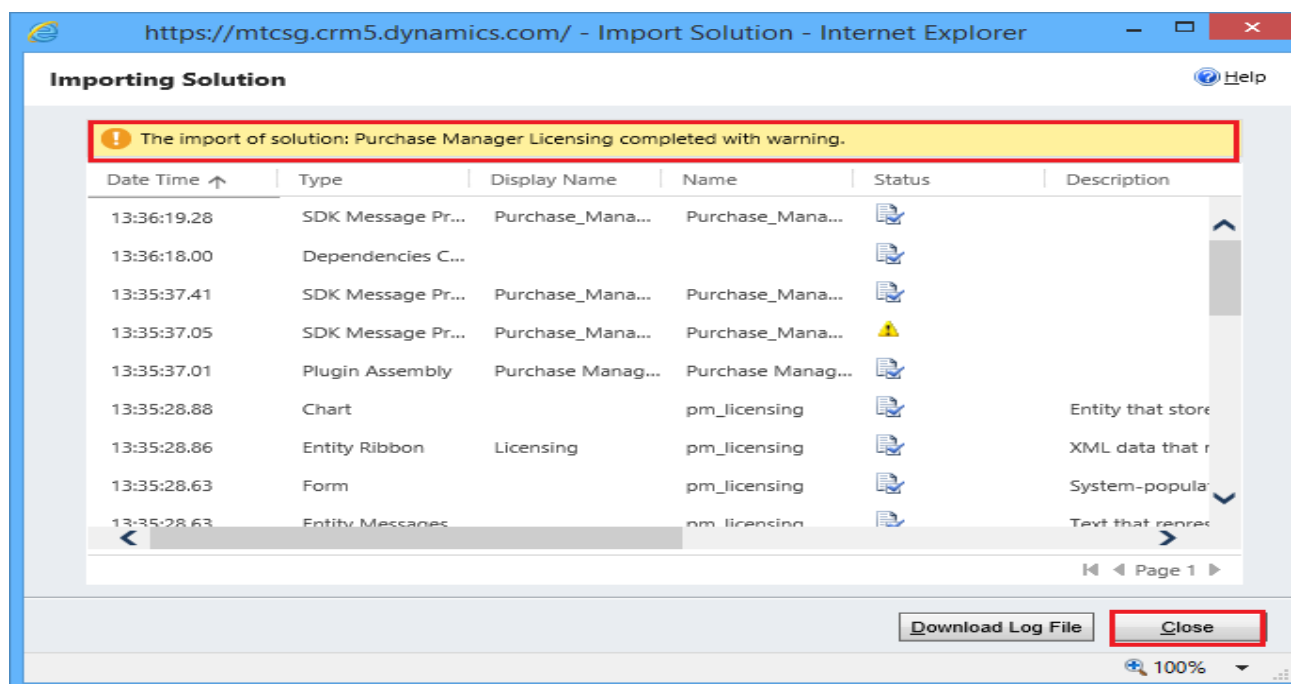


Figure 7: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

## Installing NotePro Solution

- Select Solution NotePro Solution

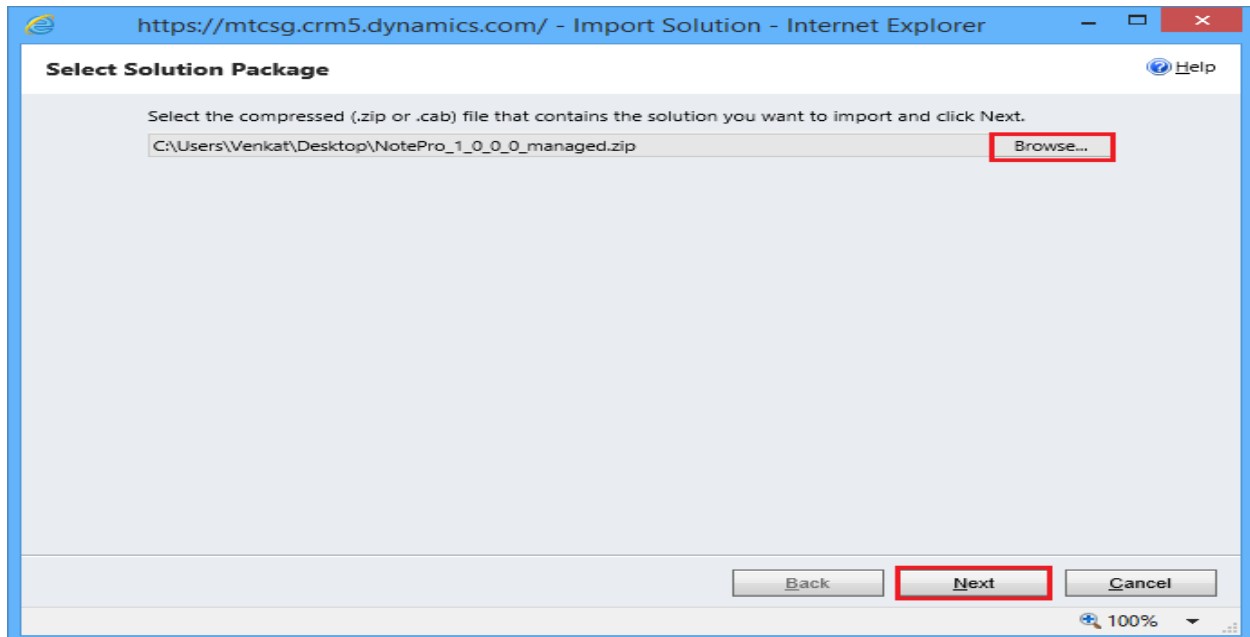


Figure 8 : Select Solution Package

- Click on next to Continue.

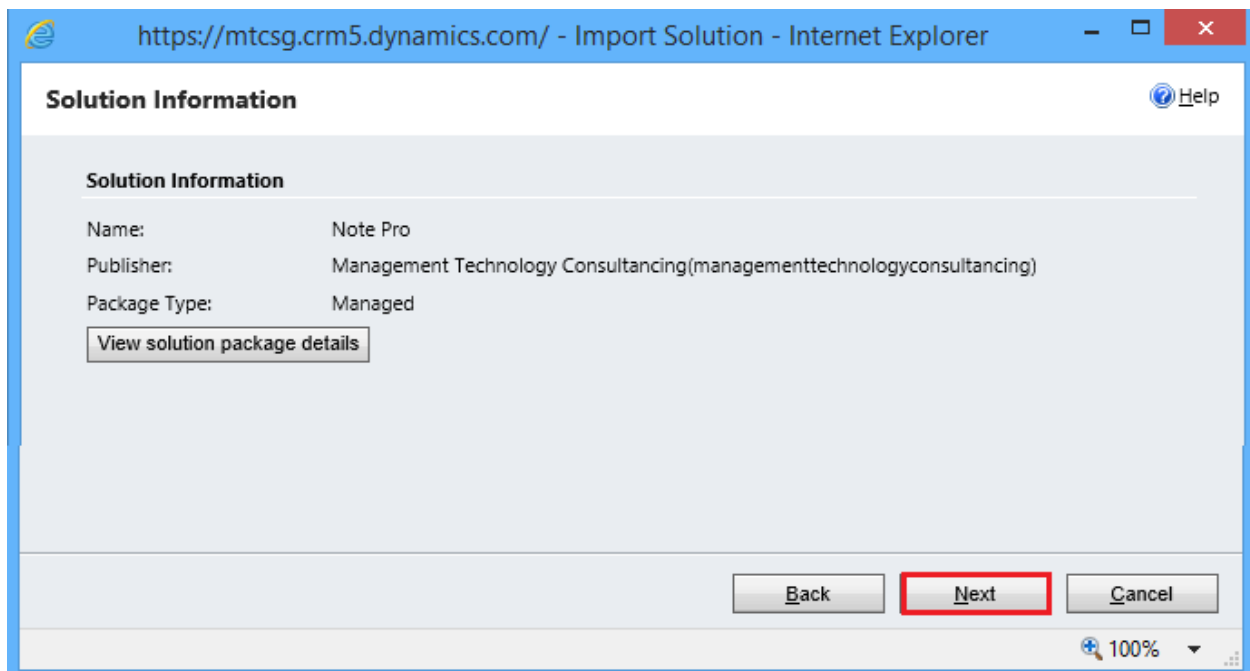


Figure 9: Solution Information

- Click on next to Continue.

- Select the Check Box which comes in between as “**Activate any process and enable any SDK message processing steps included in the solution.**” Press Next to continue.
- Click on next until it is finished and finally click on close.

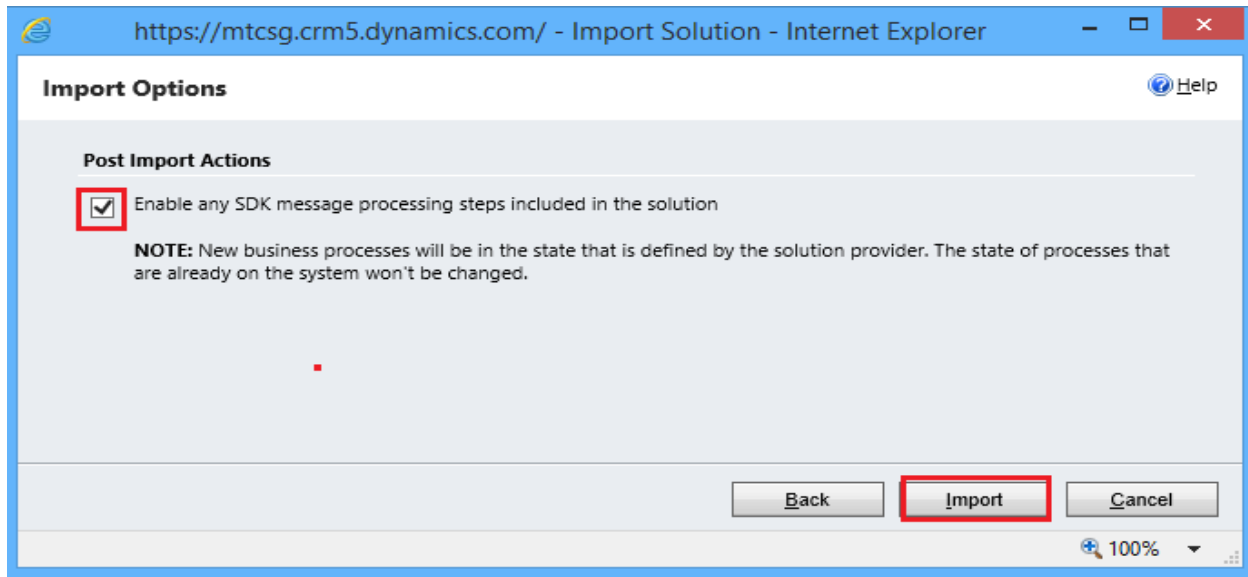


Figure 10 : Importing Options window

- Click on next it will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

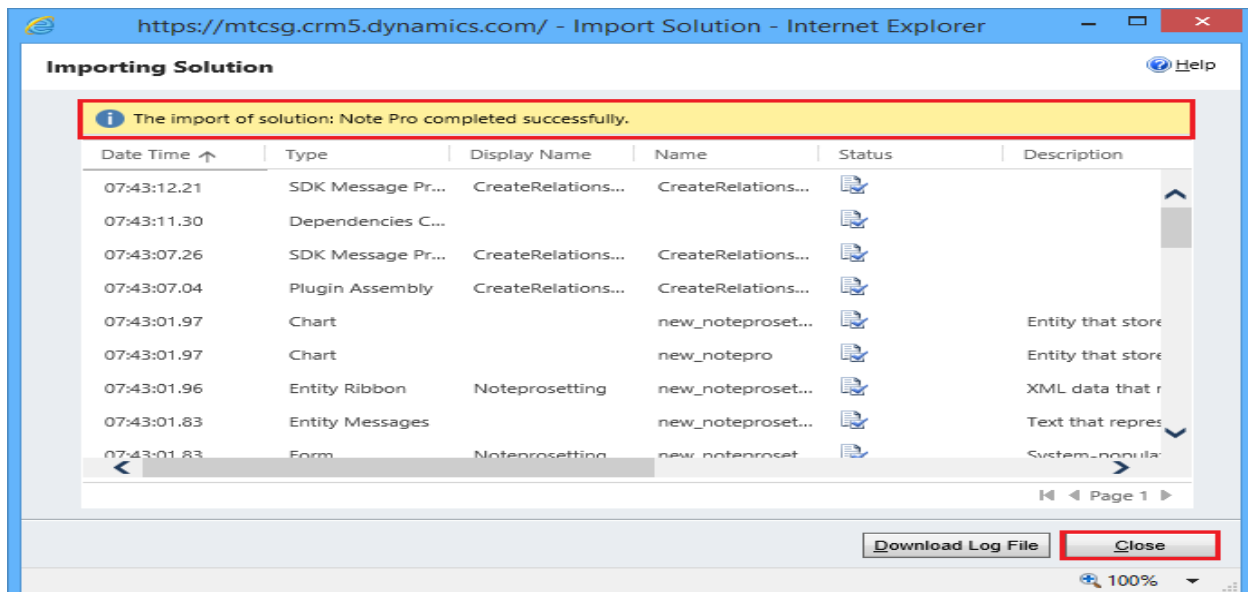
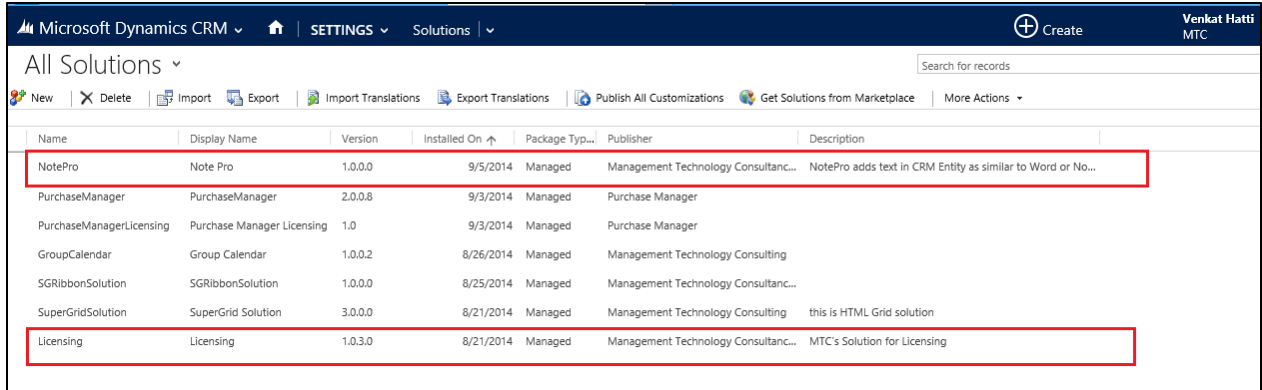


Figure 11: Importing Solution – Purchase solution

- Click on Close after successful completion message is displayed.
- After importing the NotePro Solution you need to place the License key navigate to **Settings**

### →Solution



The screenshot shows the 'All Solutions' window in Microsoft Dynamics CRM. The table lists various solutions installed on the system. Two rows are highlighted with red boxes: 'NotePro' and 'Licensing'.

Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
NotePro	Note Pro	1.0.0.0	9/5/2014	Managed	Management Technology Consultanc...	NotePro adds text in CRM Entity as similar to Word or No...
PurchaseManager	PurchaseManager	2.0.0.8	9/3/2014	Managed	Purchase Manager	
PurchaseManagerLicensing	Purchase Manager Licensing	1.0	9/3/2014	Managed	Purchase Manager	
GroupCalendar	Group Calendar	1.0.0.2	8/26/2014	Managed	Management Technology Consulting	
SGRibbonSolution	SGRibbonSolution	1.0.0.0	8/25/2014	Managed	Management Technology Consultanc...	
SuperGridSolution	SuperGrid Solution	3.0.0.0	8/21/2014	Managed	Management Technology Consulting	this is HTML Grid solution
Licensing	Licensing	1.0.3.0	8/21/2014	Managed	Management Technology Consultanc...	MTC's Solution for Licensing

Figure 12 : Navigation for licensing window

- Select the product as **NotePro**.
- Click on License.
- Enter the License key which you have received after placing the request presses the tab to enable submit button and click on submit then a pop up window appears and displays the message as **License Accepted**. Click on **OK**.

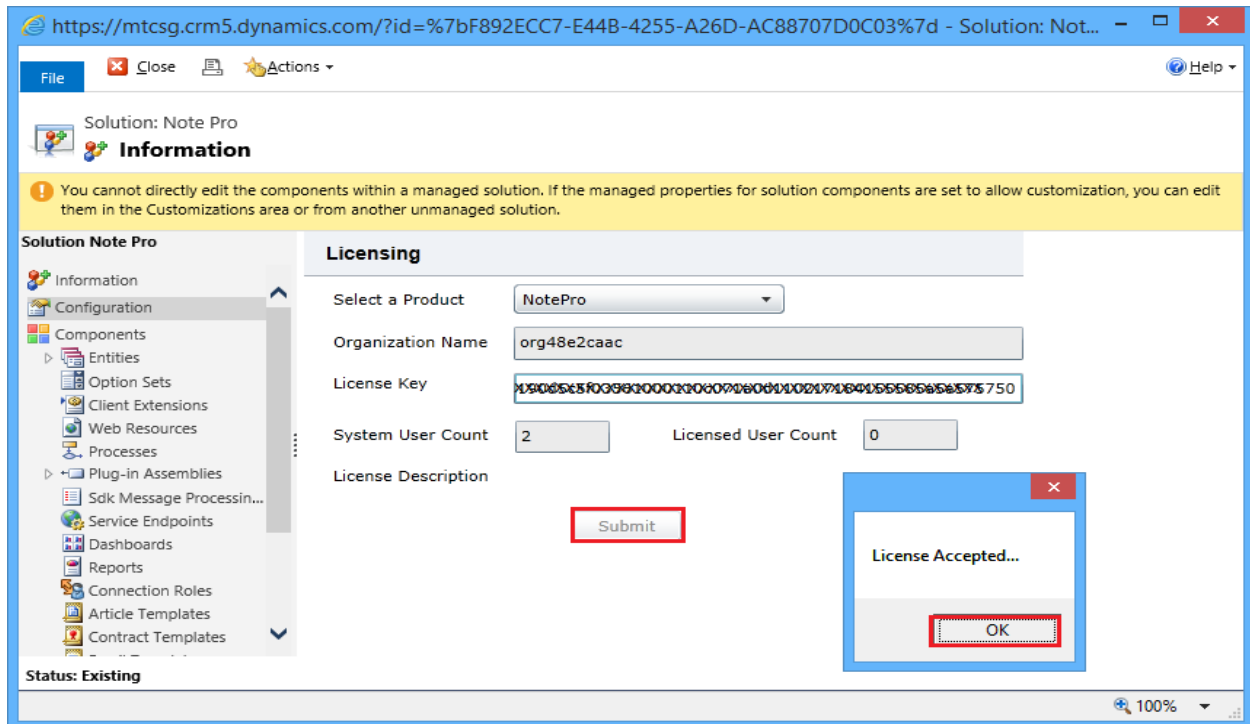


Figure 13 : Placing the License key

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## Dynamics 365 Solution - Trial License Activation/ Product License Purchase/ Additional User License Purchase

Please refer the below link for Trial License Activation and/or Product License Purchase and/or Additional User License Purchase for MTC's Dynamics 365 Solution.

<https://www.mtccrm.com/PLI>

*In case of queries or issues, please write down to [salesteam@mtccrm.com](mailto:salesteam@mtccrm.com) for quick help.*

## NotePro Functionality

- NotePro adds text in CRM Entity as similar to Word or Notepad & including images.
- NotePro allows the Rich text format using Styles & Fonts
- Facility to Add New Notes, Flag Mark the Notes or mark as Important Notes.

## One Time Setting for Each Entity

- User Needs to configure the setting for every entity that he intends to use this NotePro facility.
- For Example user wants this NotePro in Accounts Entity.
- Go to **Sales->Accounts** Select any of the existing records and open the form.

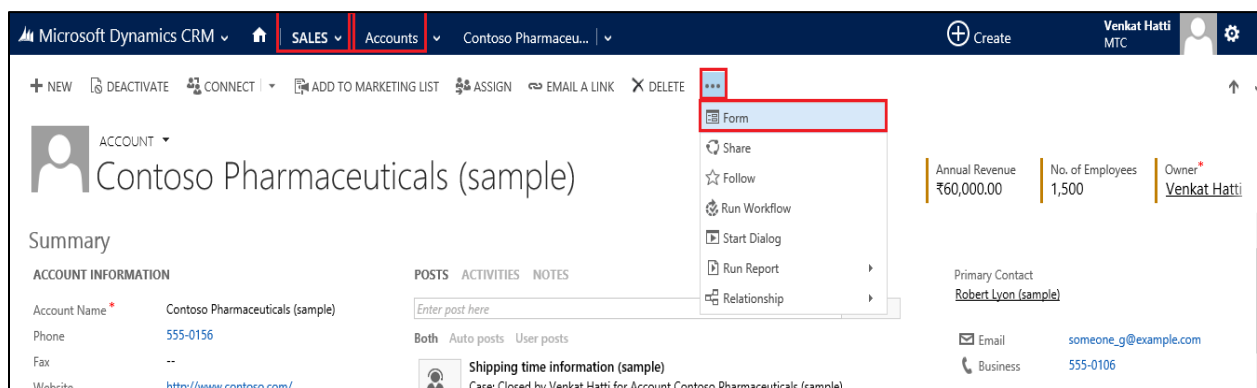


Figure 14: CRM Account from showing (...)

- Select (...) more and from the list click on Forms.
- Select Insert tab, then select ONE Section on One Tab on the form.
- Suppose you have selected One tab, hen a tab is inserted on the form.

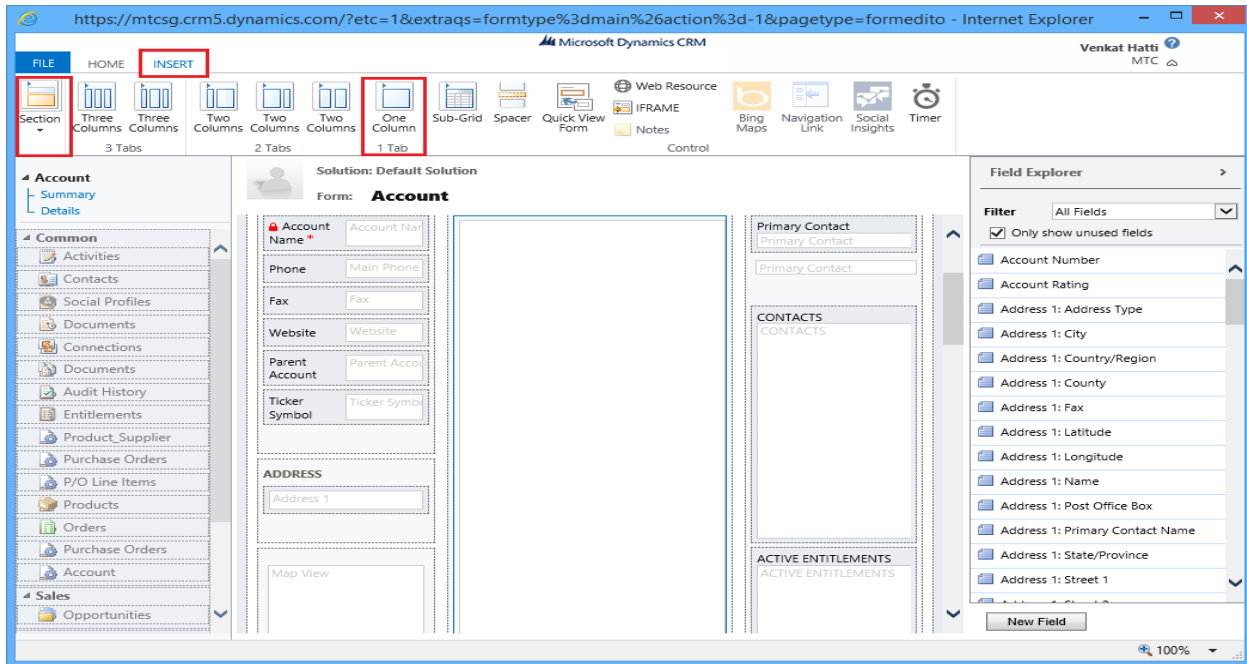


Figure 15: CRM Form setting

- Now Select The Web Resource on from the ribbon of the form.

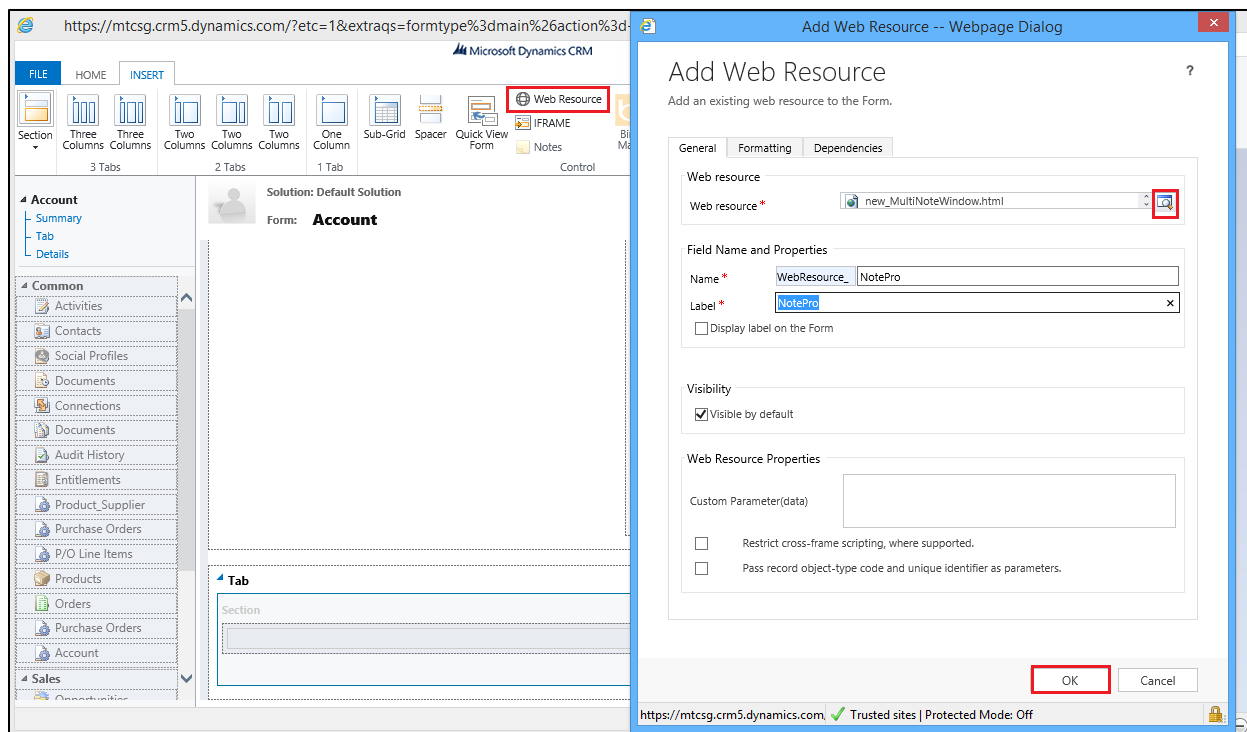


Figure 16: Add Web Resource



- Select Web resource as **new\_MultiNoteWindow.html** from the list provided
- In Field Name & properties give ex. NotePro
- Click Ok to Continue
- On the Form page click back on Home tab
- Save the form
- And Finally Publish

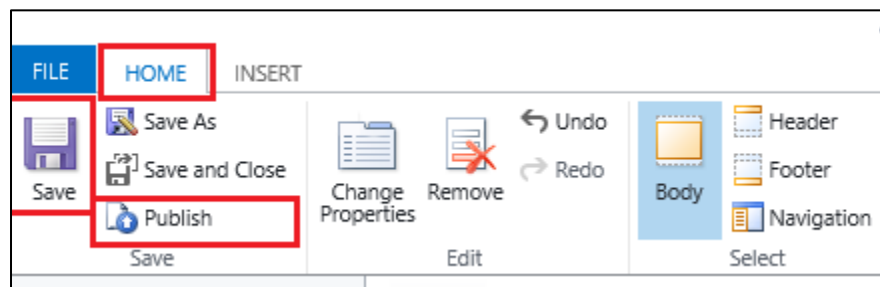


Figure 17: Form Ribbon

- Now go back to the Account form
- Refresh the form
- You will see that a new tab with NotePro created and ready to use.

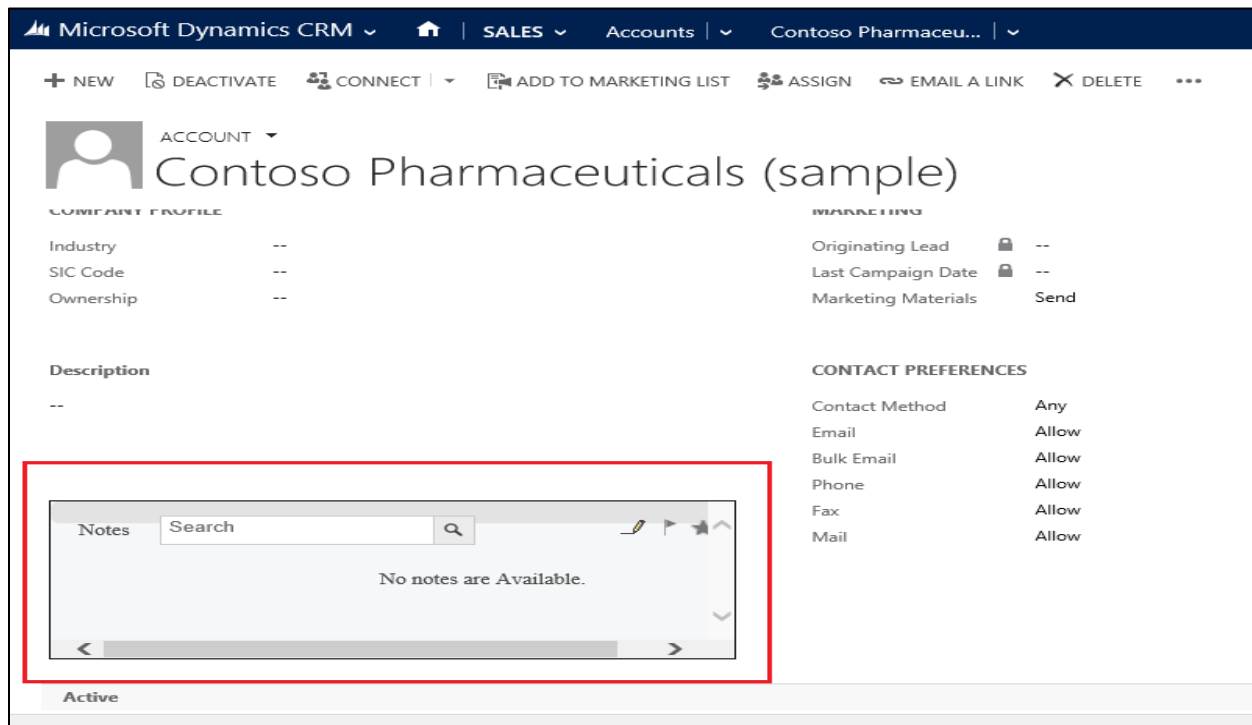


Figure 18: Account Entity with NotePro

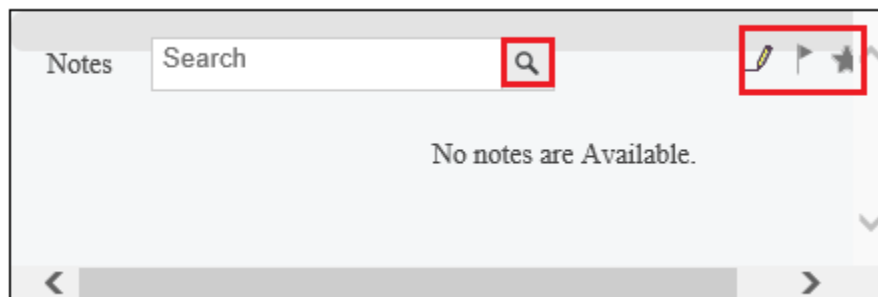


Figure 19: NotePro in Zoom



- The First Icon (Pencil) is to create new Notes
- The Middle icon (Flag) is to Flag Mark the Notes
- The Last icon (Star) is to mark the existing notes as Important
- To Create New Notes click on the First icon

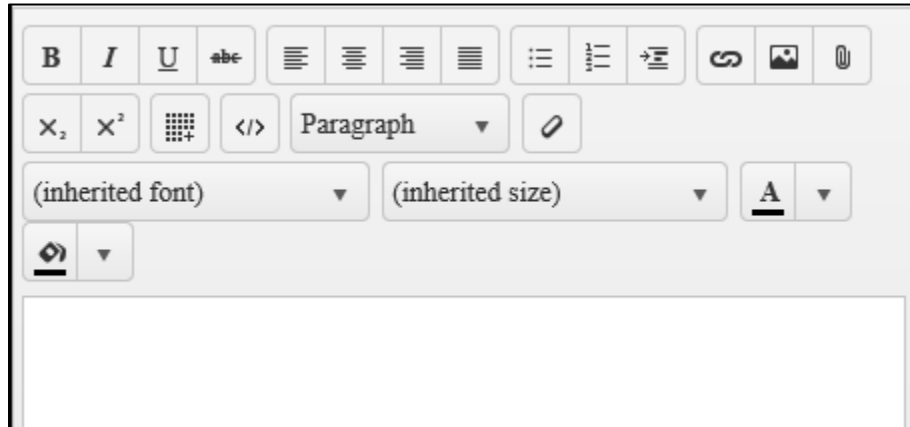



Figure 20: NotePro with Rich Text formatting icons

- Type in at the space provided. This has all the Rich text format icons which are helpful in editing the document. After entering the text or image click on Submit which is placed at the bottom of the page to save the content.
- User can also insert the Images in the space provided. For Example click on  to import Images form the web.

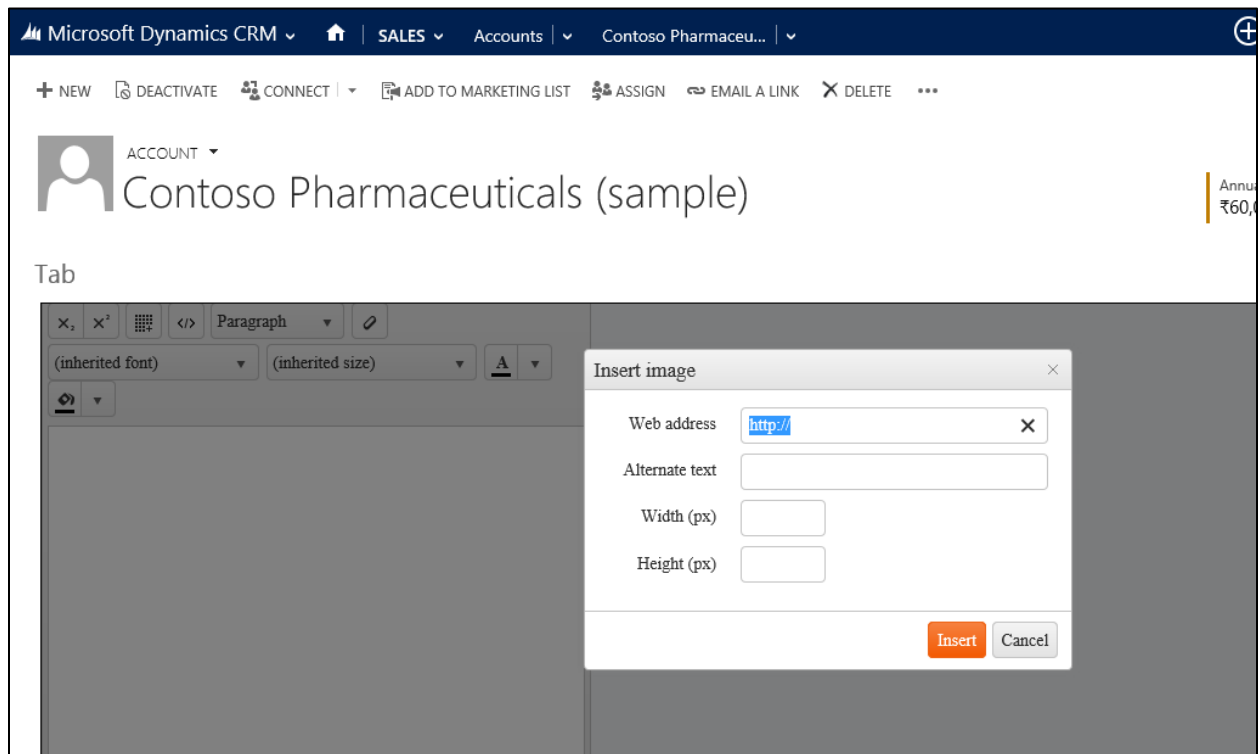


Figure 21: NotePro with Image addition facility

- Enter the Web Address
- Key in Alternate text and Width and Height (px) if required
- Finally click on Inset to get image in NotePro

- Once the Note is created it looks as shown below

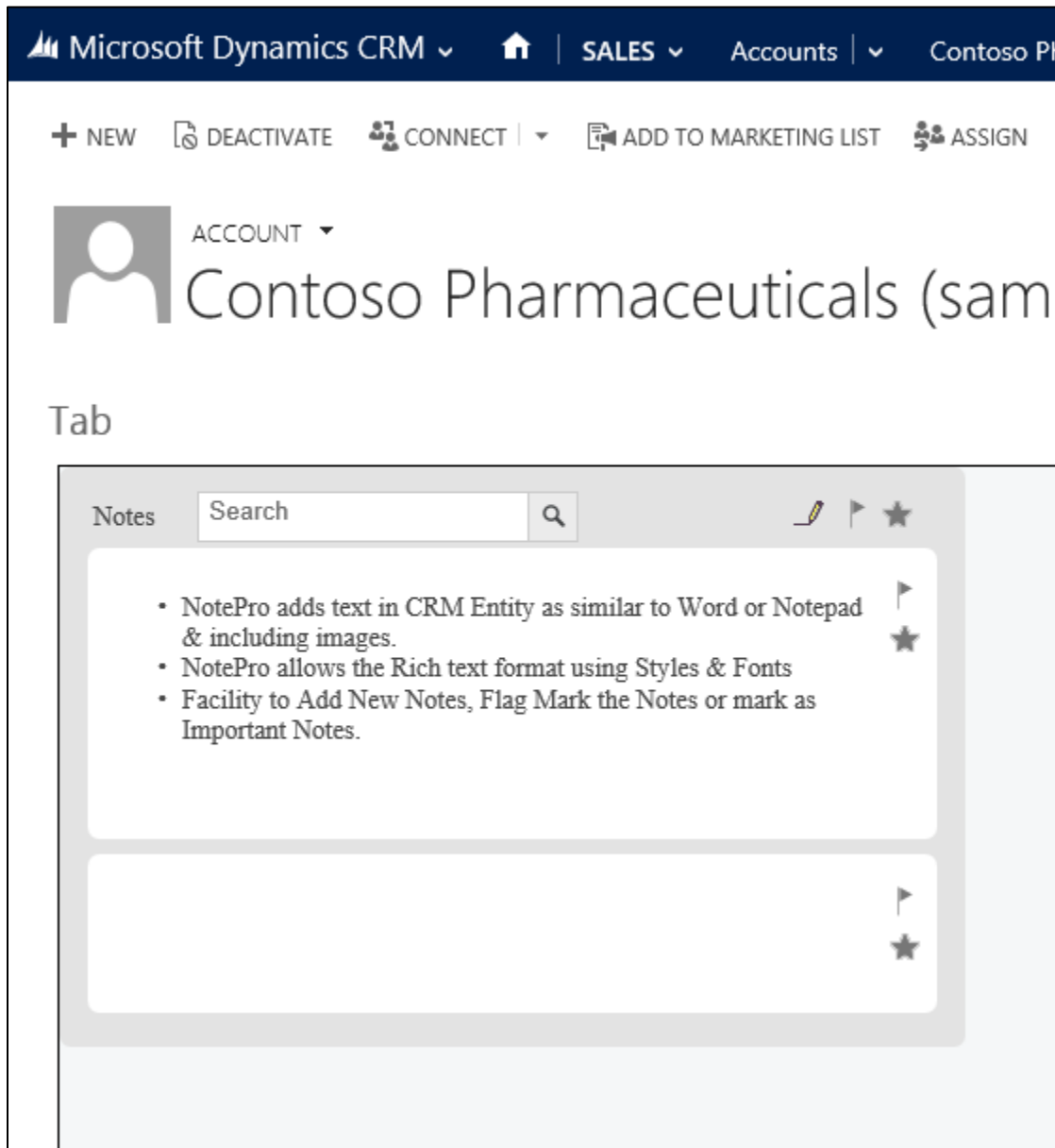


Figure 22: Account Entity with NotePro created

## Uninstallation Process

- To uninstall NotePro you need to delete NotePro Solution. Navigation is **Settings** → **Solutions** → Select the check box of NotePro then click on **Delete** as shown below

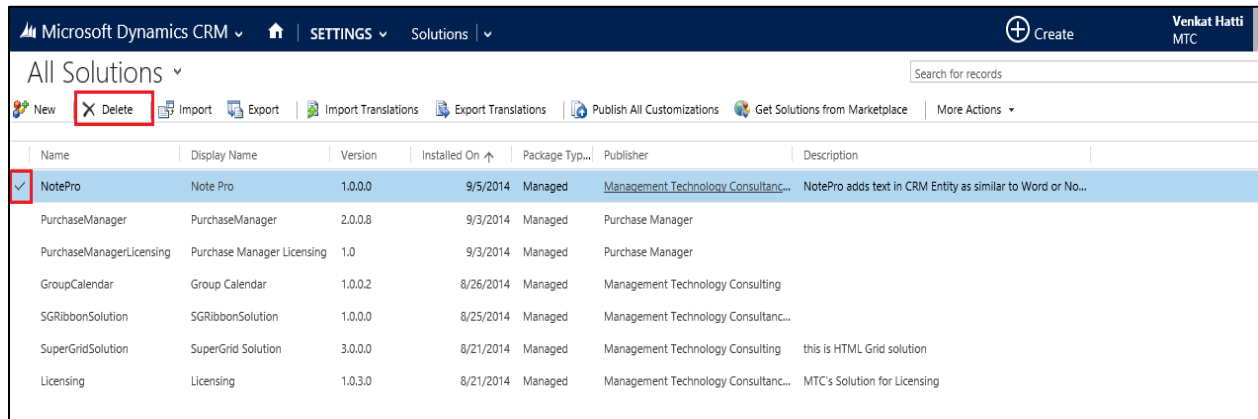


Figure 23 : Deleting NotePro Solution

- Click on **OK** to delete the solution from CRM. The solution will be deleted

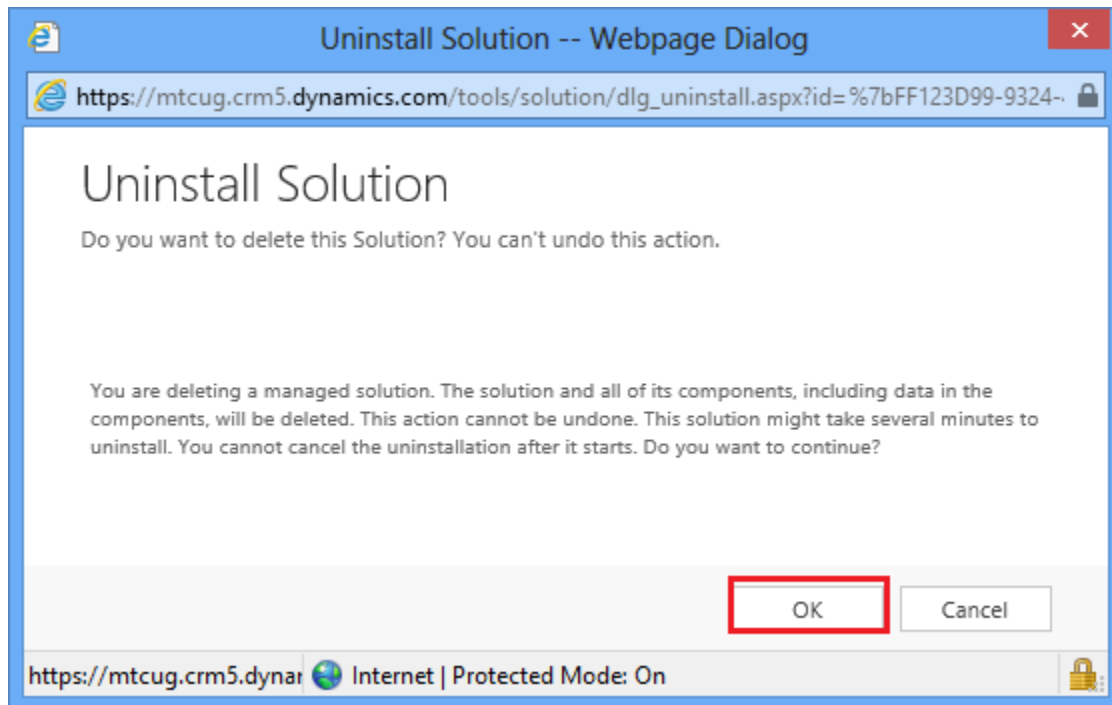


Figure 24: Solution Deleted

- Repeat the same for Licensing Solution also

## MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Dynamics 365 / CRM platform. MTC supports a product development effort with a highly efficient global Dynamics 365 / CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Dynamics 365 / CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example



Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

**SMB Custom Enterprise** is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics XRM platform technologies. Starting with the Dynamics 365 / CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

For more information on the dozens of integrated products of the "SMB Custom Enterprise" solution set visit: [www.MTCCRM.com](http://www.MTCCRM.com) MTC's low-cost and fixed-rate professional services current rate schedule: [www.MTCCRM.com/MTC\\_Services.pdf](http://www.MTCCRM.com/MTC_Services.pdf).

Management Technology Consulting LLC (MTC) is dedicated exclusively to the Dynamics 365 / CRM platform and CRM web portal technologies in the business of delivering add-on products and services.



MTC is a Microsoft Independent Solution Vender working on Dynamics 365 / CRM since the introduction of the platform. MTC's product offerings include



development technologies for the Dynamics CRM platform, add-on enhancements of features and major functions to CRM, as well as



complete vertical-market Enterprise versions of Dynamics CRM serving an every growing list of industries and organization types.

MTC's services are built on a global 24/7 rapid-response and low-cost and fixed-rate ease of engagement. MTC is US headquartered company optimized for low-cost on-demand global engagement with regionalized contacts and a development facility in Hyderabad India adjacent to Microsoft's facility.

### **The Global CRM Community DynamicsExchange.com**

MTC is the founding and managing partner of the Dynamics 365 / CRM platform Community at [www.DynamicsExchange.com](http://www.DynamicsExchange.com). Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Dynamics 365 / CRM platform with unique and innovative social networking and knowledge resource allocation processes.

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10. End-User acknowledges that the Dynamics 365 / CRM Managed Solution "Product" is of U.S. origin and agrees to comply with all applicable international and national laws that apply to the Product, including the U.S. Export Administration Regulations, as well as end-user, end-use and destination restrictions issued by U.S. and other governments.
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### **F. Customer Care details**

MTC is always open to global community of Dynamics 365 / CRM platform Software Users



**Availability and hours of operation: Monday to Friday**  
**USA PST 323-851-5008 - 8:00 AM to 6:00 PM**  
**India IST 323-863-0077 - 8:30 PM to 8:30 AM in PST**

**USA Headquarters:**  
**Management Technologies Consulting, LLC**  
**7738 Sky hill Drive, Los Angeles, CA 90068**

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