

Product Trial/Product License
Purchase/Product Additional
License Purchase Help Instructions
Quick Guide

For Microsoft AppSource Users

www.appsource.com



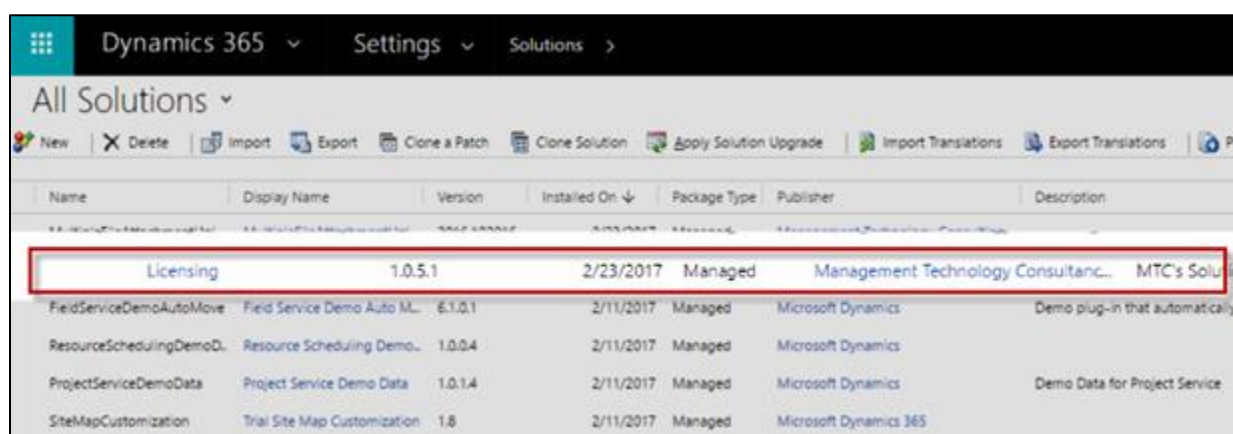
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Product Free Trial Help Instructions

Below are the simple steps for 15 day free trial activation of MTC's product downloaded from AppSource on your online Dynamics 365 / CRM instance.

1. Go to Settings Solutions Licensing on your online Microsoft Dynamics 365 / CRM instance. Click on licensing solution.



2. Enter your company and individual contact details completely and click Submit. Registration is required only this once for all solution limited trials or permanent licensing of any MTC solution for this platform.

ACCOUNT INFORMATION

First Name*

Andy

Last Name*

Wilson

Company

Manpower Argo Avenue Serv

Phone

4562358956

Website

www.maas.com

Email*

andyw@maas.com

City

Birmingham

State/Province

West Midlands

Country

England

Zip/Postal Code

500045

Submit

3. **Your trial license key will be activated only when you first use the solution.** This activation may cause a few second delay on the first use.
4. After "Submit" a screen showing all the available MTC products is shown with those that are installed and ready to use. Additional products can be installed AppSource [Here](#), and purchased from the "Get it Now" link on this screen.

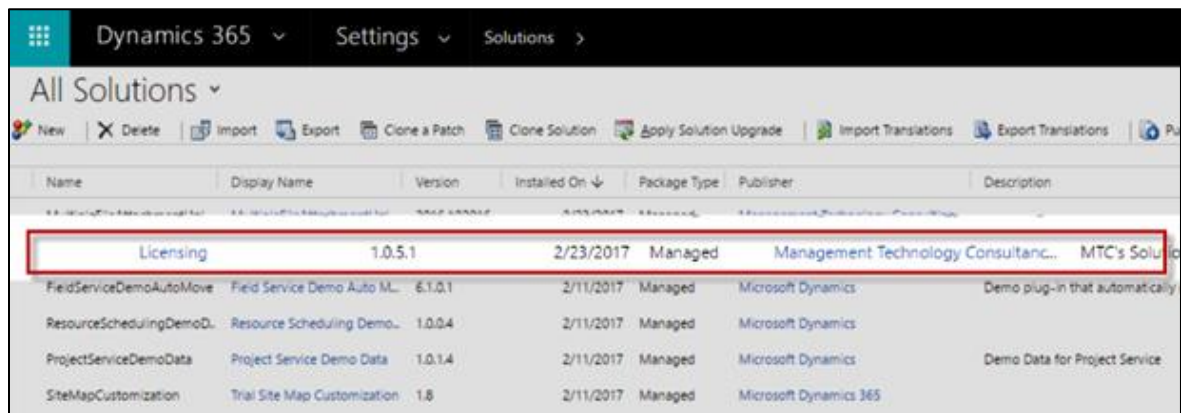
Products	Expiry Date	No of Users			
Email To Case			Get it Now		
Export DataTool			Get it Now		
Global Search			Get it Now		
Go To Webinar			Get it Now		
Group Calendar			Installed	Purchase License	Update License
Mail Merge			Get it Now		
Notes Rollup			Get it Now		

In case of any issues or enquiries, please write to sales@mtccrm.com for quick help.

Product License Purchase Help Instructions

Below are the simple steps for purchasing product license for MTC's product(s) downloaded from AppSource.

1. Go to Settings → Solutions → Licensing on your online Microsoft Dynamics 365 / CRM instance. Click on licensing solution.



2. An Account Information window with list of MTC products will be displayed.

Solution: Licensing
Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customization

Solution Licensing

- Information
- Configuration
- Components
- Entities
- Option Sets
- Client Extensions
- Web Resources
- Processes
- Plug-in Assemblies
- Sdk Message Processing St...
- Service Endpoints
- Dashboards
- Reports
- Connection Roles
- Article Templates
- Contract Templates
- Email Templates
- Mail Merge Templates
- Security Roles
- Field Security Profiles
- Routing Rule Sets
- Record Creation and Updat...
- SLAs
- Apps

ACCOUNT INFORMATION

First Name* Last Name*

Company Phone

Website Email*

City State/Province

Country Zip/Postal Code

Products	Expiry Date	No of Users			
Email To Quote			Get it Now		
Web To Crm Forms			Get it Now		
Notes Rollup	4/24/2017	1	Installed	Purchase License	Update License
CRMStarterPack				Purchase As Bundle	Update License
Activity Calendar			Get it Now		
Alerts			Installed	Purchase License	Update License
CRM Picture			Installed	Purchase License	Update License
Report To PDF			Installed	Purchase License	Update License
Auto Number			Installed	Purchase License	Update License
Note Pro			Get it Now		
EmailManagementBundle				Purchase As Bundle	Update License
Email Signature			Get it Now		
Email To Case			Get it Now		

- After successful installation of product as explained under **Product Free Trial Activation (see above)**, a purchase license link and update license link will appear against the product.
- Click on Purchase License link (E.g. Alerts).
- It will open a web page on your browser allowing you to set subscription type, base price and quantity.

MTC
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One + One = Three
#1 Producer of Dynamics 365 / CRM Products in AppSource
#1 Provider of CRM-Exclusive Engineering Services Globally
Our Capability Adds Up to Much More Value


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Translate


Home Products Services My Account Cart


MTC Blog Request Quote Partner Community

Purchase License

Product	Subscription Type	Base Price	Per User Price	Quantity	Subtotal
 Alerts	<div> <div>—select—</div> <div>—select—</div> <div>Full</div> <div>Monthly</div> <div>Yearly</div> </div>			<input type="text"/>	
Grand Total					


6. Click on **Continue**.

 Purchase License

Product	Subscription Type	Base Price	Per User Price	Quantity	Subtotal
	Monthly	\$0.00	\$1.00	1	\$1.00
Grand Total					\$1.00

Continue ☒

7. An invoice with the requesting contact will be generated. Click on **Accept-Pay** button.



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INVOICE
SUMMARY LINE ITEMS
Invoice :

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America, Europe, East, Middle East, Pacific, Australia, Asia, India, Russia

Mail Payments to: 7738 Skyhill Drive - Los Angeles, CA 90068 - USA 323-851-5008
Wire Transfer: Bank of America - Routing: 026009593 - Account: 2007004321 - SWIFT: BOFAUS3N

California
CA-91409
USA
Contact:
Email:
Requesting Contact:





Currency
US Dollar

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Corp: www.MTCCRM.com
Community: www.DynamicsExchange.com

MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Till	Terms

Item#	Product or Service Description	Qty/Hrs	Unit Cost	Sub Total
MtcPro_57	Alerts For Dynamic CRM	1.00	\$1.00	\$1.00
Total			\$1.00	

Accept-Pay










Add P/O Customer Add Text Edit Cancel Download PDF Print

For any queries contact - Salesteam@mtccrm.com or by calling 323-863-0077.
Thank You for Your Business!

8. You will be directed to **Choose Payment Process**. Make your selection by clicking on the options listed.

Choose Payment Process

- You will be directed to the Payment Process page where you need to enter the credit card details. Click on **Save** button.

Payment Process

CRM Organization Name:
Apply Coupon:

Choose Payment Process

☒ Enter a New Card

Enter Card Details

Credit Card Type:
Card Expiration Date(MM-YYYY): /

Credit Card Number:
First Name:

Last Name:

Credit Card Billing Address Details

Company Name:
Country:

Street:
Postal Code:

City:
Phone:

State:

- Click on **Continue** button.

Payment Process

CRM Organization Name: Apply Coupon:

Choose Payment Process

☐ XXXX1111
 ☐ XXXX1881
 ☐ XXXX0007
 ☒ Enter a New Card

Credit Card Details

Card Number:

Card Type:

Exp Date:

First Name:

Last Name:

Credit Card Billing Address Details

Company Name:

Phone: 323-851-5008

Street: 7738 Skyhill Dr

City: Hyderabad

State: AP

Country: ANTIGUA AND BARBUDA

Postal Code: 90068-1232

11. You will be directed to Credit Card, Invoice and Billing Address page. Click on **Pay Now** button.

Payment Process

Credit Card Information

FirstName: LastName:
 Credit Card Number: ExpiryDate:

Invoice Information

Invoice Name: MTC Alerts APR-28-17 Invoice Number: AR-13049
 Amount: \$1.00 CRM Organization Name: MTC
 Item Count: 1 Created On: 4/28/2017


Credit card Billing Address

Company Name: MCC
 Street: PO Box 9999 Country: INDIA
 City: California PostalCode: 91409
 State: CA Phone: 818-773-9999

Invoice detail items are:

Product or Service Description	Qty/Hrs	Unit Cost	Sub Total
Alerts For Dynamic CRM	1.00	\$1.00	\$1.00
Total			\$1.00

12. A paid invoice copy will be displayed on the screen which can be downloaded in PDF format or can be printed. Simultaneously, an email with this paid invoice copy will be sent to you.



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INVOICE
SUMMARY LINE ITEMS
Invoice :

Mail Payments to: 7738 Skyhill Drive - Los Angeles, CA 90068 - USA 323-851-5008
Wire Transfer: Bank of America - Routing: 026009593 - Account: 2007004321 - SWIFT: BOFAUS3N

7738 Skyhill Drive
Los Angeles, CA 90068
USA

Contact: info@mtccrm.com
Email: info@mtccrm.com
Requesting Contact: info@mtccrm.com

Currency: US Dollar




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Corp: www.MTCCRM.com
Community: www.DynamicsExchange.com

MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Till	Terms
7738 Skyhill Drive	323-851-5008	info@mtccrm.com			MTCCRM-00000001	05/05/2017	05/05/2017	100%

Item#	Product or Service Description	Qty/Hrs	Unit Cost	Sub Total
MtcPro_57	Alerts For Dynamic CRM	1.00	\$1.00	\$1.00
Total				\$1.00

July-05-17 Paid by Credit card ending ...5016 – Thank You!



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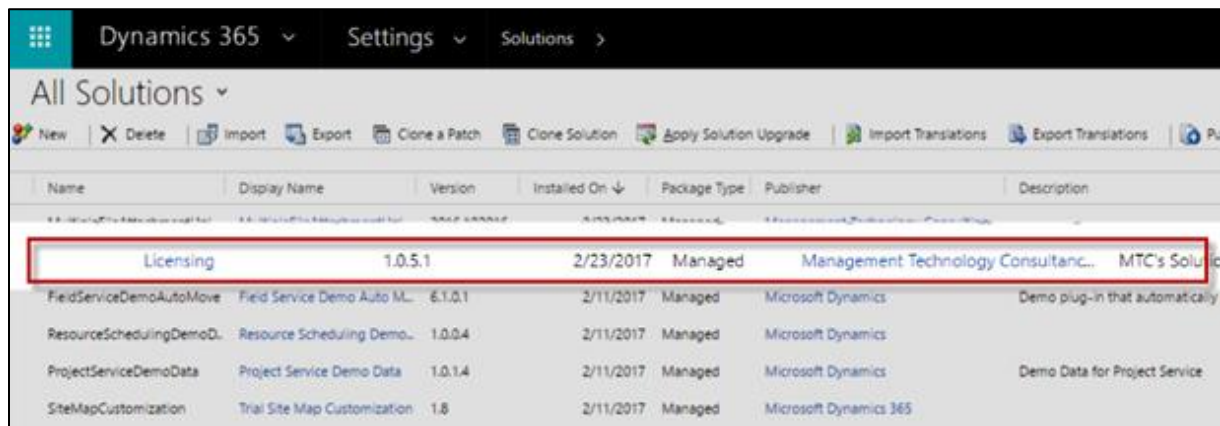
14. Finally, go to licensing solution page and click on **Update License** link to see the expiry date and no. of users being reflected.

In case of any issues or enquiries, please write to sales@mtccrm.com for quick help.

Buy More License Help Instructions

Below are the simple steps for buying more license for MTC's product downloaded from AppSource.

1. Go to **Settings** → **Solutions** → **Licensing** on your online Microsoft Dynamics 365 / CRM instance. Click on licensing solution.



2. An Account Information window with list of MTC products will be displayed.

Solution: Licensing
Information

ACCOUNT INFORMATION

First Name* Last Name*

Company Phone


Website Email*


City State/Province

Country Zip/Postal Code

Products	Expiry Date	No of Users			
Email To Quote			Get it Now		
Web To Crm Forms			Get it Now		
Notes Rollup	4/24/2017	1	Installed	Purchase License	Update License
CRMStarterPack				Purchase As Bundle	Update License
Activity Calendar			Get it Now		
Alerts			Installed	Buy more License	Update License
CRM Picture			Installed	Purchase License	Update License
Report To PDF			Installed	Purchase License	Update License
Auto Number			Installed	Purchase License	Update License
Note Pro			Get it Now		
EmailManagementBundle				Purchase As Bundle	Update License
Email Signature			Get it Now		
Email To Case			Get it Now		


- Click on **Buy More License** link against the product (E.g. Alerts).
- It will open a web page in your browser where you can see the subscription type already set (that is because you have already purchased license) and now enables you to add more users. Click on **Continue**.

 Buy More License

Product	Subscription Type	Base Price	Per User Price	Quantity	Subtotal
 Alerts	Monthly	\$0.00	\$1.00	<input type="text" value="1"/>	\$1.00
Grand Total					\$1.00

☒

- An invoice with the requesting contact will be generated. Click on **Accept-Pay** button.



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INVOICE
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Invoice : 00000000000000000000

Mail Payments to: 7738 Skyhill Drive - Los Angeles, CA 90068 - USA 323-851-5008
Wire Transfer: Bank of America - Routing: 026009593 - Account: 2007004321 - SWIFT: BOFAUS3N

California
CA-91409
USA

Contact: 323-851-5000
Email: sales@mtdcrm.com
Requesting Contact: sales@mtdcrm.com


Currency
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MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Thru	Terms
00000000000000000000	00000000000000000000	sales@mtdcrm.com			MTC: 00000000000000000000	00/00/00	00/00/00	00/00

Item#	Product or Service Description	Qty/Hrs	Unit Cost	Sub Total
MtcPro_57	Alerts For Dynamic CRM	1.00	\$1.00	\$1.00
			Total	\$1.00

Accept-Pay



Add P/O

Customer

Add Text

Edit

Cancel


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Thank You for Your Business!

- You will be directed to **Choose Payment Process**. Make your selection by clicking on the options listed.

Choose Payment Process




- You will be directed to the Payment Process page where you need to enter the credit card details. (Or choose the already existing saved card if any). Click on **Save** button.

Payment Process

CRM Organization Name: Apply Coupon:

Choose Payment Process

☒ Enter a New Card

Enter Card Details

Credit Card Type: Card Expiration Date(MM-YYYY):

Credit Card Number: First Name: Last Name:

Credit Card Billing Address Details

Company Name: Country:

Street: Postal Code:

City: Phone:

State:

8. Click on **Continue** button.

Payment Process

CRM Organization Name: Apply Coupon:

Choose Payment Process

☐ XXXX1111 ☐ XXXX1881 ☐ XXXX0007

☒ Enter a New Card

Credit Card Details

Card Number: Card Type:

Exp Date: First Name: Last Name:

Credit Card Billing Address Details

Company Name: Phone:

Street: City:

State: Country: Postal Code:

9. You will be directed to Credit Card, Invoice and Billing Address page. Click on **Pay Now** button.

Payment Process

Edit Details

Pay Now

Credit Card Information

FirstName:

LastName:

Credit Card Number:

ExpiryDate:

Invoice Information

Invoice Name:

MTC Alerts APR-28-17

Invoice Number:

AR-13049

Amount:

\$1.00

CRM Organization Name:

MTC

Item Count:

1

Created On:

4/28/2017

Credit card Billing Address

Company Name:

MCC

Street:

PO Box 9999

City:

California

State:

CA

Country:

INDIA

PostalCode:

91409


Phone:

818-773-9999

Invoice detail items are:

Product or Service Description	Qty/Hrs	Unit Cost	Sub Total
Alerts For Dynamic CRM	1.00	\$1.00	\$1.00
Total			\$1.00

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Wire Transfer: Bank of America - Routing: 026009593 - Account: 2007004321 - SWIFT: BOFAUS3N

Mail
California
City: Irvine
State: CA

Contact: info@mtccrm.com
Email: info@mtccrm.com
Requesting Contact
Agent


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MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Till	Terms
00000000000000000000	00000000000000000000	00000000000000000000			00000000000000000000	00000000000000000000	00000000000000000000	00000000000000000000

Item#	Product or Service Description	Qty/Hrs	Unit Cost	Sub Total
MtcPro_57	Alerts For Dynamic CRM	1.00	\$1.00	\$1.00
Total				\$1.00

July-05-17 Paid by Credit card ending ...5016 – Thank You!



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