



Dynamics 365 / CRM / XRM Platform



Revenue Forecast Manager

User Guide



Microsoft Dynamics™ CRM

CRM Versions Supported: 2011/2013/2015/2016/D 365

Revenue Forecast Manager for Dynamics 365 / CRM allows easy sales forecast revenue management review and on-the-fly editing from CRM Opportunities. Uses CRM Opportunity Views for review by your criteria for Totaling of revenue, weighted revenue, count, average and more.

Coding Version	: 1.0.0.0
Document Version	: 1.0.0.1
DOD	: June 22, 2016

Copyright

Copyright ©2016, **Management Technology Consulting LLC**, Inc. All rights reserved.

Your right to copy this documentation is limited by copyright law and the terms of the software license agreement. As the software licensee, you may make a reasonable number of copies or printouts for your own use. Making unauthorized copies, adaptations, compilations, or derivative works for commercial distribution is prohibited and constitutes a punishable violation of the law

Disclaimer

Information in this document is subject to change without notice and should not be construed as a commitment on the part of **Management Technology Consulting LLC** and does not assume any responsibility or make any warranty against errors that may appear in this document and disclaims any implied warranty of the merchantability or fitness for a particular purpose.

Table of Contents

Copyright	2
Disclaimer	2
Introduction	5
Installation Process	6
License Key.....	10
Dynamics 365 Solution - Trial License Activation/ Product License Purchase/ Additional User License Purchase	13
Forecast Manager.....	14
MTC Overview	18
The Global CRM Community DynamicsExchange.com	18
End User License Agreement (EULA)	19

Table of Figures

Figure 1: Import Solution.....	6
Figure 2 : Select Solution	7
Figure 3: Solution Information.....	7
Figure 4 : Activate Process.....	8
Figure 5 : Solution imported	8
Figure 6: Revenue Forecast Manager in CRM.....	9
Figure 7: Customization screen.....	10
Figure 8: Organization Unique Name	10
Figure 9 : Licensing Window	11
Figure 10 : Placing the License Key to Revenue Forecast Manager	11
Figure 11 CRM main Screen.....	14
Figure 12 CRM Screen - after selecting Forecast Manager.....	14
Figure 13: Topic being shown in edit mode.....	15
Figure 14: Potential Customer with Look up Icon	15
Figure 15: Close Date with Calendar to change the date	15
Figure 16: Revenue being edited	16
Figure 17: Probability being edited	16
Figure 18: Rating being shown with drop down menu	16
Figure 19: Save icons to save Data after editing	17
Figure 20: Revenues being shown.....	17

Introduction

Revenue Forecast Manager for Dynamics 365 / CRM 2011 and Online allows easy sales revenue forecasting. From CRM Opportunities revenue gains in-place View editing, totaling, and weighting probability % to perform CRM's missing analysis capability. Editing of key Opportunity fields including sale description, owner, sales stage, amounts, dates, probability, notes, etc. across all sales staff, accounts, and all opportunity variables, with selectable time-periods will drive sales professional management across your sales organization.

Feature and Benefits of Forecast Manager

- Reports with Totaling by Selectable Criteria on all CRM Entity windows
- Compact View for all opportunities listing Projects, Accounts, and Users.
- Complete compliance to the Dynamics 365 / CRM SDK
- Easily centrally review and iterate all relevant data in sales Opportunities.
- All CRM Modes – On-Premises, Internet Facing Deployment (IFD), Dynamics 365 / CRM online, Hosted
- Export data and to Microsoft Excel for inclusion in other analysis or presentations.
- Supports analysis by all standard or custom CRM "Advanced Find" View buckets from days and weeks to quarters and years to fit the unique business model, or simply alternate views of the business.

Installation Process

To install the Revenue Forecast Manager solution, the following steps are to be followed.

STEP 1:

- Go to <http://www.dynamicsexchange.com/RFM.aspx> and click on Download Forecast Manager.

STEP 2:

- After the download is complete, a new window will pop up for Click on Save.
- It will save the file in Downloads folder. (Revenue Forecast Manager & Licensing Solution)
- Extract the files from the downloaded folder.

STEP 3:

- To import the solution open your CRM click on **Settings→Solutions→Import**. It will open import Solution window.

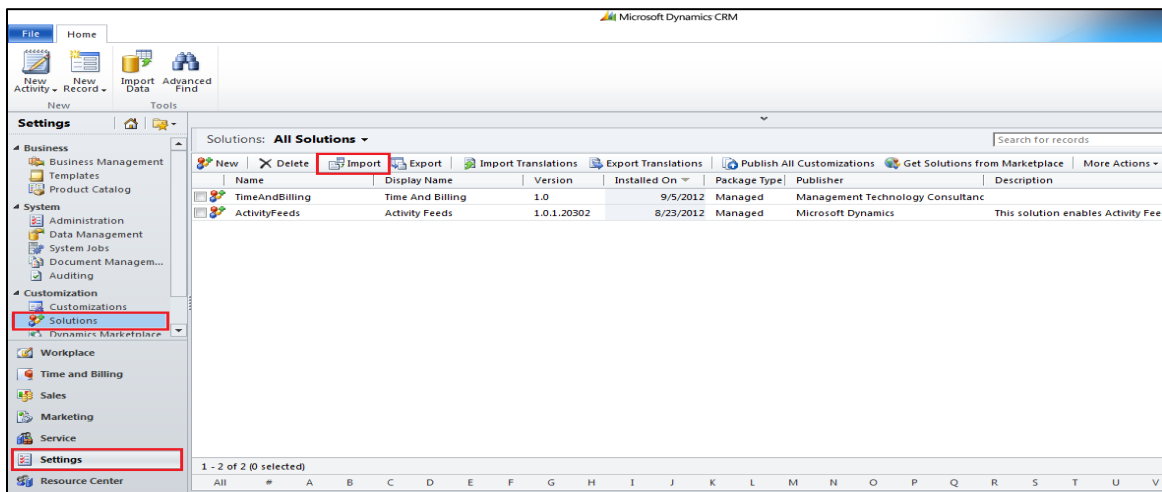


Figure 1: Import Solution

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

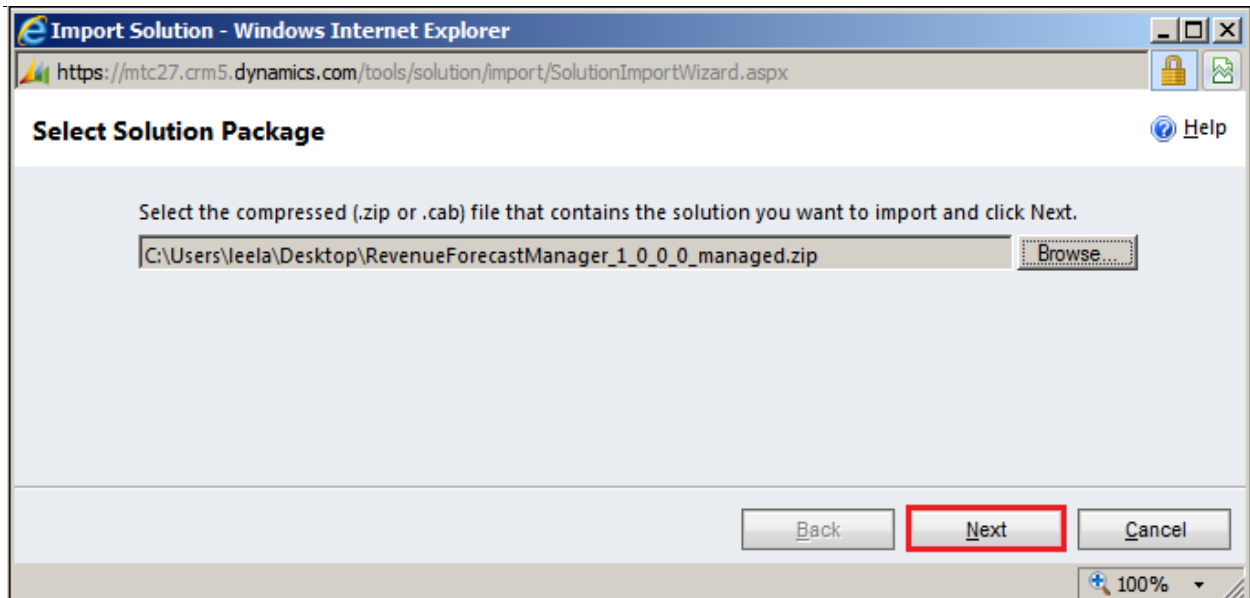


Figure 2 : Select Solution

- Solution information gives you the information about the solution package details. Click on **Next** to continue.

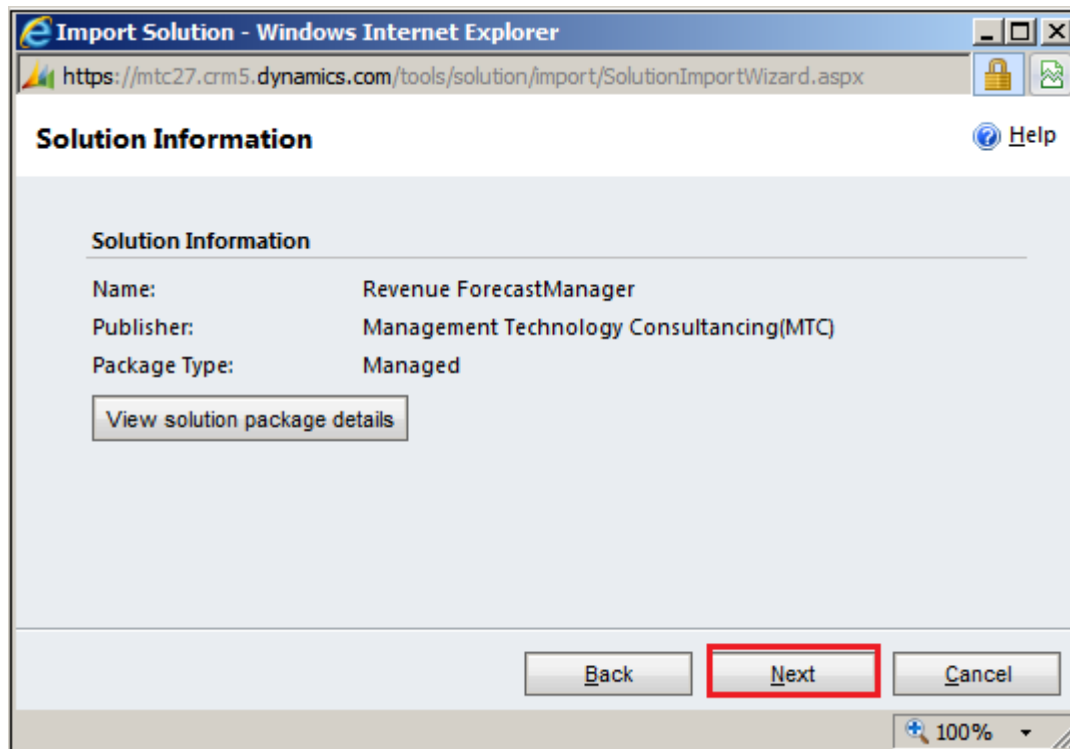


Figure 3: Solution Information

- 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.

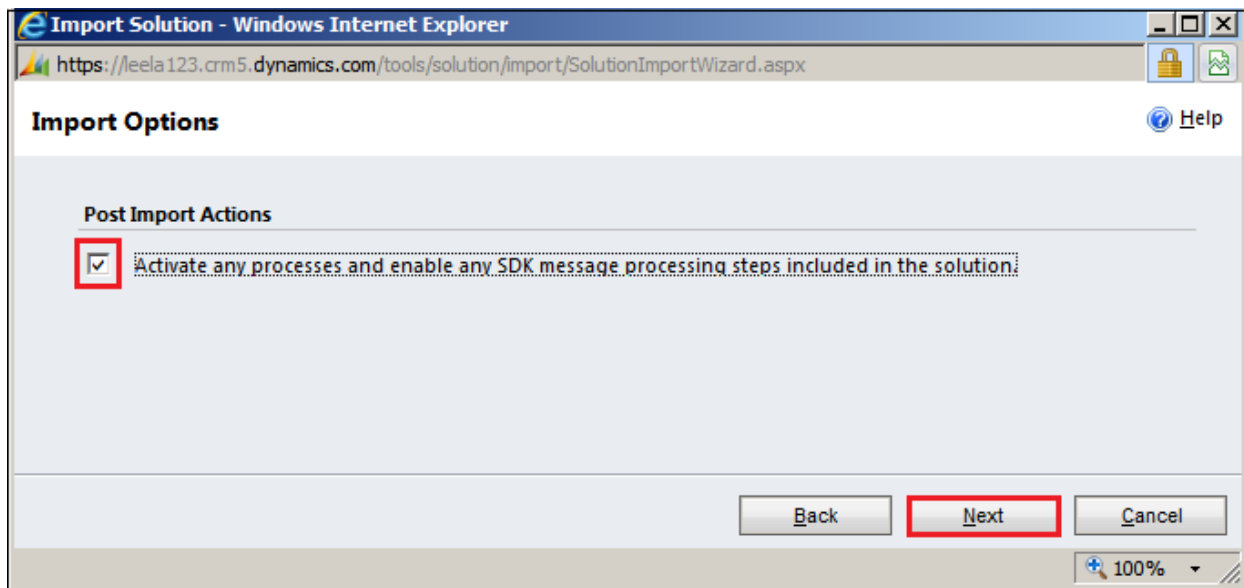


Figure 4 : Activate Process

- 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** and **refresh the web page**.

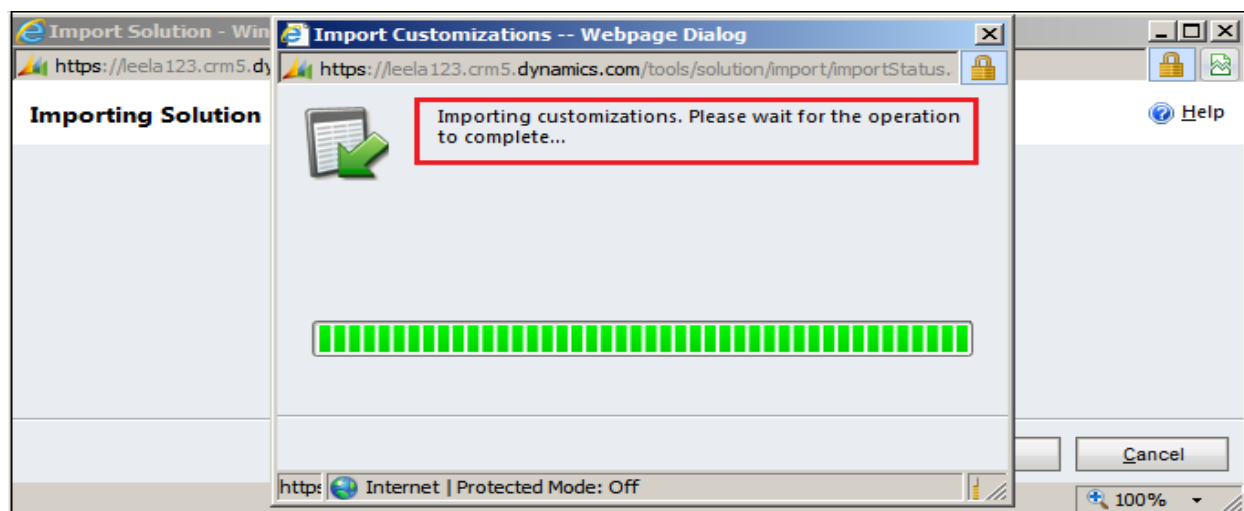


Figure 5 : Solution imported

Note: To import other solution file into CRM follow the same procedure from STEP 3

STEP 4:

- As soon as the uploading is completed, it starts reflecting in CRM. Click the icon on the browser to refresh the webpage.

Microsoft Dynamics CRM CRM Admin for Test1

File Home

New Activity - Record - New Ribbon Workbench Import Data Advanced Find

Settings

Business Management Templates Product Catalog System Administration Data Management System Jobs Document Management Auditing Customization Customizations Solutions Dynamics Marketplace Process Center Processes Workplace Sales Marketing Service Settings Resource Center

Solutions: All Solutions

New Delete Import Export Import Translations Export Translations Publish All Customizations Get Solutions from Marketplace More Actions

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
newstudent	new student	1.0.0.0	11/21/2012	Unmanaged	Default Publisher for Test1	
student	student	1.0.0.0	11/20/2012	Unmanaged	Default Publisher for Test1	
PluginProfiler	Plug-in Profiler	1.0.0.0	11/18/2012	Managed	Michael Scott	
Mtc_CopyRecordSet	Mtc_CopyRecordSet	1.0.0.0	11/18/2012	Unmanaged	Management Technology Consulting	Copy Record Set for Microsoft Dynamics CRM 2011 and
Licensing	Licensing	1.0.2.0	10/31/2012	Managed	Management Technology Consulting	
RevenueForecastManager	Revenue ForecastManager	1.0.0.0	10/31/2012	Unmanaged	Management Technology Consulting	
RibbonWorkBenchDemo	Ribbon Work Bench Demo	1.0.0.0	10/28/2012	Unmanaged	Default Publisher for Test1	
RibbonWorkBench	Ribbon Workbench	1.0.1.5	10/28/2012	Managed	Develop 1 Ltd	v1.0.1.5 -Better error reporting on publishing -Preserve

1 - 8 of 8 (0 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Figure 6: Revenue Forecast Manager in CRM

License Key

First get the License key from salesteam@mtccrm.com. To get the license key, follow the below procedure.

- Click on **Settings** → **Customization** → **Click on Developer Resources**.

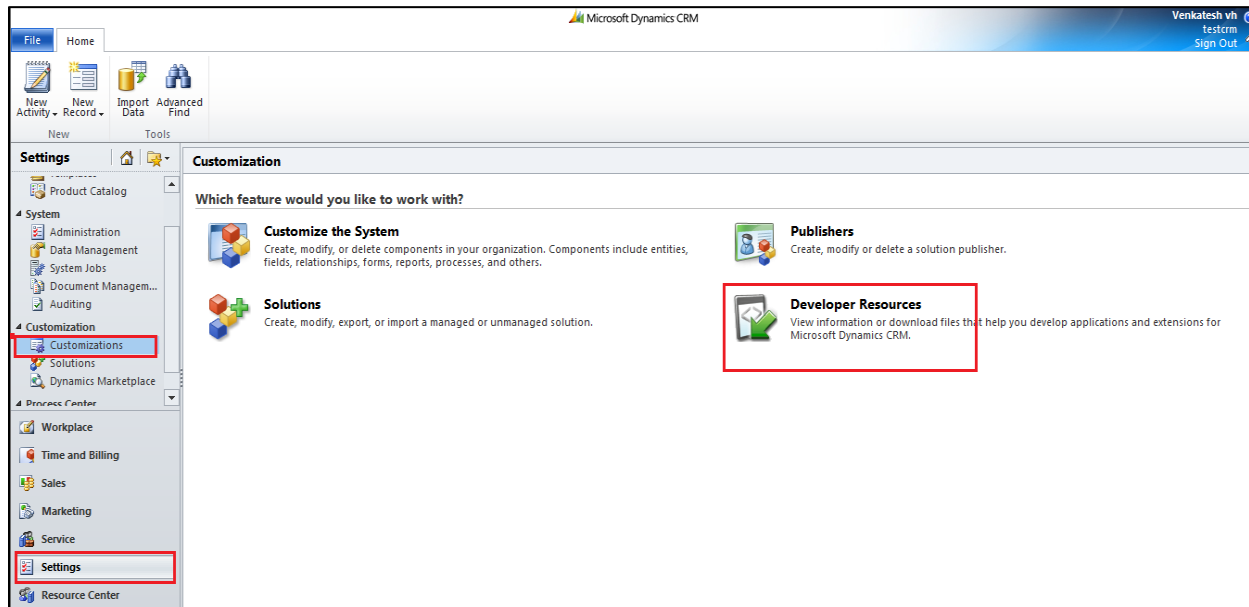


Figure 7: Customization screen

- Now copy the Organization Unique name and send it to salesteam@mtccrm.com. The license key will reach you in next 24 hours (maximum). For example, In this case the unique name is mtcdoc as shown below

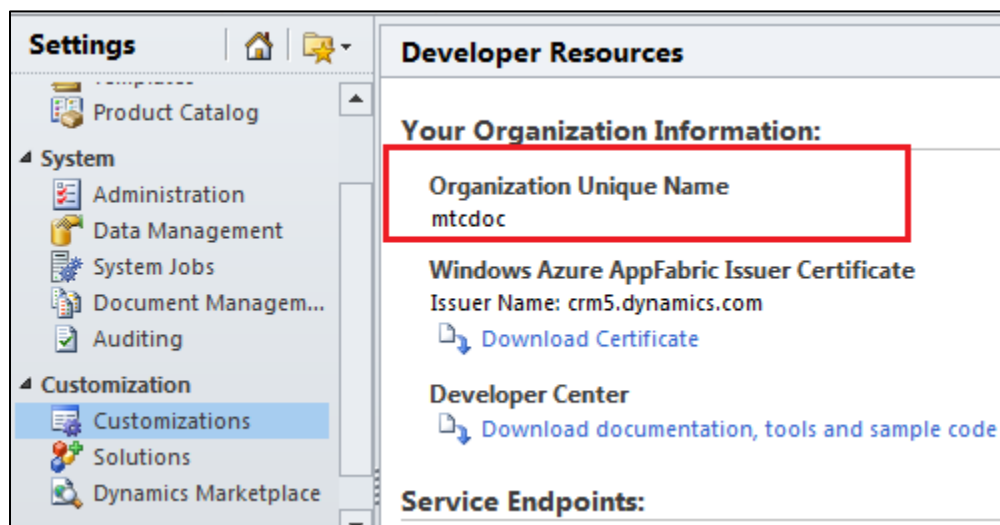


Figure 8: Organization Unique Name

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

- After getting Forecast Manager Licensed key go to **Settings** → **Solution** → Click on **LICENSING** in the working screen

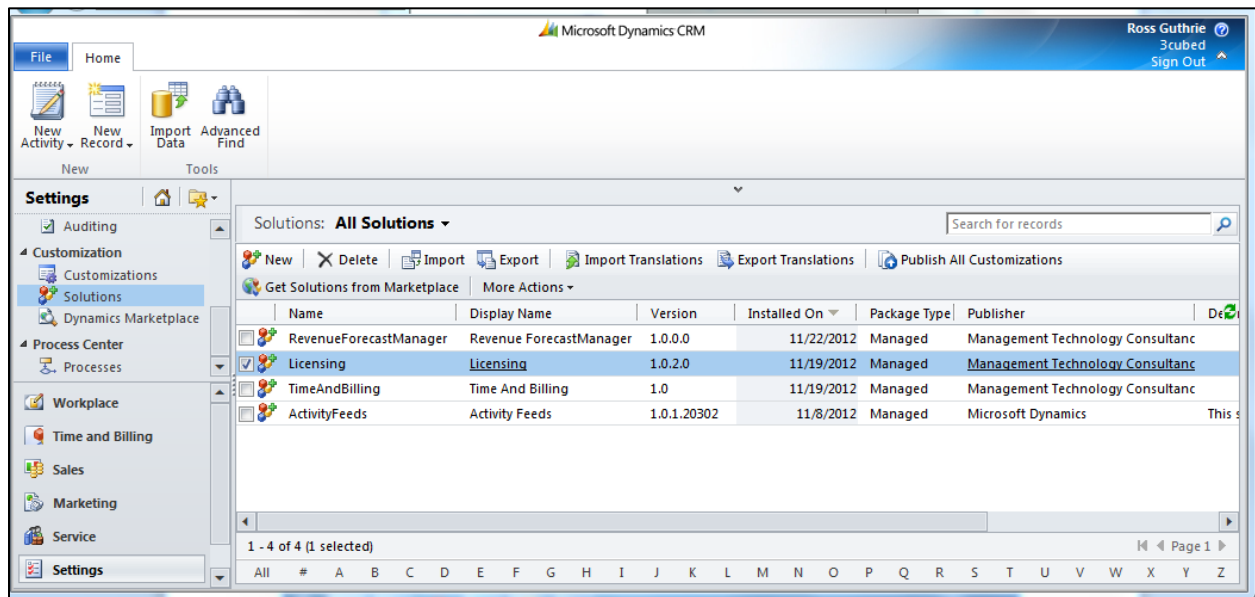


Figure 9 : Licensing Window

- Select Configuration tab to place the License Key to Revenue Forecast Manager

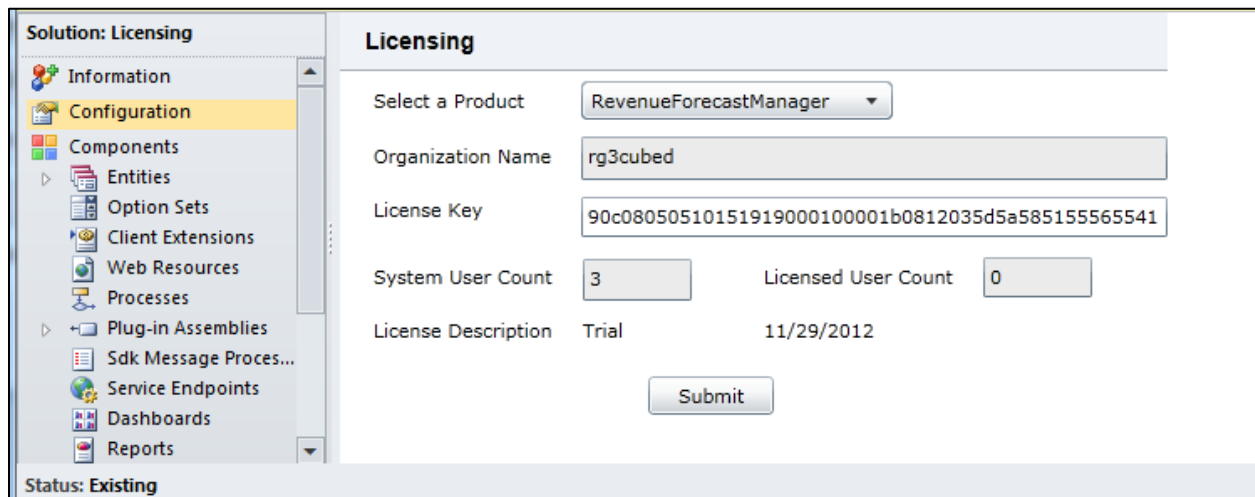


Figure 10 : Placing the License Key to Revenue Forecast Manager

- Select the Product from the Drop down list (Select a Product as Revenue Forecast Manager)
- Organization name is automatically displayed
- Enter the **LICENSE KEY** or cut & paste the license key which you have received after placing the request.

-
- Click on **Submit** button. A pop up window appears and displays the message **License Accepted**.

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 for quick help.

Forecast Manager

- Open CRM, Click on Sales , Click on Opportunity
- Wait for list of Opportunities to display
- Click on Forecast Manager icon on the ribbon as shown below

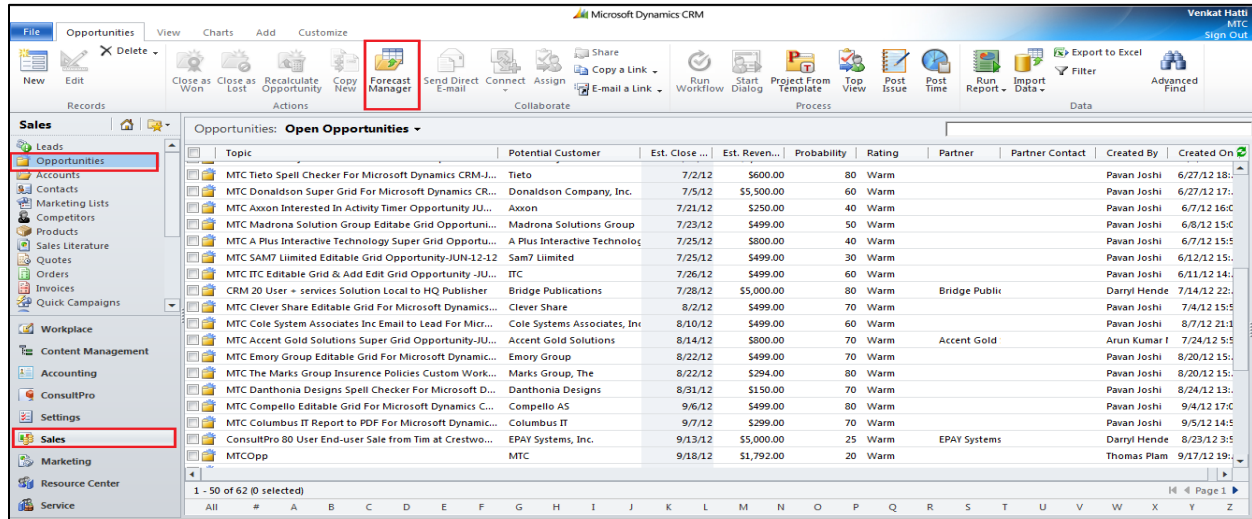


Figure 11 CRM main Screen

- After clicking on the Forecast Manager icon, you can see that the Total Revenue, Weighted Revenue, Average Revenue and count are displayed.

Opportunities: Open Opportunities ▼											Search for records		
Total Revenue		Weighted Revenue		\$46,208.00		Count		50		Average Revenue		\$825.00	
<input type="checkbox"/>	<input type="checkbox"/>	Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating	Partner	Partner Contact	Created By	Created On		
<input type="checkbox"/>		MTC Dominic Systems Limited Interested In Spell Ch	Dominic Systems Ltd.	6/26/2012	\$1,000.00	50	Warm			Pavan Joshi	6/27/12 18:00		
<input type="checkbox"/>		MTC Tieto Spell Checker For Microsoft Dynamics CRM	Tieto	7/2/2012	\$600.00	80	Warm			Pavan Joshi	6/27/12 17:00		
<input type="checkbox"/>		MTC Donaldson Super Grid For Microsoft Dynamics CRM	Donaldson Company, Inc.	7/5/2012	\$5,500.00	60	Warm			Pavan Joshi	6/7/12 16:00		
<input type="checkbox"/>		MTC Axxon Interested In Activity Timer Opportunity	Axxon	7/21/2012	\$250.00	40	Warm			Pavan Joshi	6/8/12 15:00		
<input type="checkbox"/>		MTC Madrona Solution Group Editable Grid Opportunity	Madrona Solutions Group	7/23/2012	\$499.00	50	Warm			Pavan Joshi	6/7/12 15:50		
<input type="checkbox"/>		MTC A Plus Interactive Technology Super Grid Opportunity	A Plus Interactive Technology	7/25/2012	\$800.00	40	Warm			Pavan Joshi	6/12/12 15:00		
<input checked="" type="checkbox"/>		MTC SAM7 Limited Editable Grid Opportunity-JUN-1: Sam7 Limited	Sam7 Limited	7/25/2012	\$499.00	30	Warm			Pavan Joshi	6/12/12 15:00		
<input type="checkbox"/>		MTC ITC Editable Grid & Add Edit Grid Opportunity - ITC	ITC	7/26/2012	\$499.00	60	Warm			Pavan Joshi	6/11/12 14:00		
<input type="checkbox"/>		CRM 20 User + services Solution Local to HQ Publish	Bridge Publications	7/28/2012	\$5,000.00	80	Warm	Bridge Publications		Darryl Hend	7/4/12 22:00		
<input type="checkbox"/>		MTC Clever Share Editable Grid For Microsoft Dynamics CRM	Clever Share	8/2/2012	\$499.00	70	Warm			Pavan Joshi	7/4/12 15:50		
<input type="checkbox"/>		MTC Cole System Associates Inc Email to Lead Form	Cole Systems Associates, Inc.	8/10/2012	\$499.00	60	Warm			Pavan Joshi	8/7/12 21:10		
<input type="checkbox"/>		MTC Accent Gold Solutions Super Grid Opportunity-J	Accent Gold Solutions	8/14/2012	\$800.00	70	Warm	Accent Gold		Arun Kumar	7/24/12 5:50		
<input type="checkbox"/>		MTC Emory Group Editable Grid For Microsoft Dynamics CRM	Emory Group	8/22/2012	\$499.00	70	Warm			Pavan Joshi	8/20/12 15:00		
<input type="checkbox"/>		MTC The Marks Group Insurance Policies Custom Work	Marks Group, The	8/22/2012	\$294.00	80	Warm			Pavan Joshi	8/24/12 13:00		
<input type="checkbox"/>		MTC Danthonia Designs Spell Checker For Microsoft Dynamics CRM	Danthonia Designs	8/31/2012	\$150.00	70	Warm			Pavan Joshi	8/24/12 13:00		
<input type="checkbox"/>		MTC Compello Editable Grid For Microsoft Dynamics CRM	Compello AS	9/6/2012	\$499.00	80	Warm			Pavan Joshi	9/4/12 17:00		
<input type="checkbox"/>		MTC Columbus IT Report to PDF For Microsoft Dynamics CRM	Columbus IT	9/7/2012	\$299.00	70	Warm			Pavan Joshi	9/5/12 14:50		
<input type="checkbox"/>		ConsultPro 80 User End-user Sale from Tim at Crestwork	EPAY Systems, Inc.	9/13/2012	\$5,000.00	25	Warm	EPAY Systems, Inc.		Darryl Hend	8/23/12 3:50		
<input type="checkbox"/>		MTCOpp	MTC	9/18/2012	\$1,792.00	20	Warm			Thomas Plamondon	9/17/12 19:00		

Figure 12 CRM Screen - after selecting Forecast Manager

- If the Forecast Manager is activated you will see that all the rows in this Opportunities screen, will have an edit option available where in you can Directly edit any particular field without going in to the record details.
- Detailed edit screens are shown below







Opportunities: Open Opportunities ▾					
Total Revenue	\$41,233.50	Weighted Revenue	\$46,208.00	Count	50
<input type="checkbox"/>  Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	
<input type="checkbox"/>  MTC Dominic Systems Limited Interested In Spell Ch	Dominic Systems Ltd.	6/26/2012	\$1,000.00	50	
<input checked="" type="checkbox"/>  Sell Checker For Microsoft Dynamics CRM-JUN-27-12	Tieto	7/2/2012	\$600.00	80	
<input type="checkbox"/>  MTC Donaldson Super Grid For Microsoft Dynamics C	Donaldson Company, Inc.	7/5/2012	\$5,500.00	60	
<input type="checkbox"/>  MTC Axxon Interested In Activity Timer Opportunity	Axxon	7/21/2012	\$250.00	40	
<input type="checkbox"/>  MTC Madrona Solution Group Editable Grid Opportuni	Madrona Solutions Group	7/23/2012	\$499.00	50	

Figure 13: Topic being shown in edit mode

- Field Topic being shown in edit mode (in the above figure)
- The Potential Customer field is shown with Look up icon for an edit mode- shown below


Potential Customer	Est. Close Date	Est. Revenue	Probability
In Spell Ch Dominic Systems Ltd.	6/26/2012	\$1,000.00	50
ynamics CRM Tieto 	7/2/2012	\$600.00	80
Dynamics C Donaldson Company, Inc.	7/5/2012	\$5,500.00	60
ppportunity Axxon	7/21/2012	\$250.00	40
d Opportuni Madrona Solutions Group	7/23/2012	\$499.00	50

Figure 14: Potential Customer with Look up Icon

- Est. Close Date is in edit mode to select the same from the Calendar as shown below


Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating
Dominic Systems Ltd.	6/26/2012	\$1,000.00	50	Warm
Tieto	10:00 AM 	\$600.00	80	Warm
Donaldson Company, Inc.				Warm
Axxon				Warm
Madrona Solutions Group				Warm
A Plus Interactive Techno				Warm
Sam7 Limited				Warm
ITC				Warm
Bridge Publications				Warm
Clever Share				Warm
Cole Systems Associates,				Warm
Accent Gold Solutions	8/14/2012	\$800.00	70	Warm
Emory Group	8/22/2012	\$499.00	70	Warm

Figure 15: Close Date with Calendar to change the date

- Est. Revenue is shown below in direct edit mode and you may change if necessary

Est. Close Date	Est. Revenue	Probability	Rating
6/26/2012	\$1,000.00	50	Warm
7/2/2012	500.00	80	Warm
7/5/2012	\$5,500.00	60	Warm
7/21/2012	\$250.00	40	Warm
7/23/2012	\$499.00	50	Warm
7/25/2012	\$800.00	40	Warm
7/25/2012	\$499.00	30	Warm

Figure 16: Revenue being edited

- Probability field shown for editing or corrections if needed

Est. Revenue	Probability	Rating
\$1,000.00	50	Warm
\$600.00	80	Warm
\$5,500.00	60	Warm
\$250.00	40	Warm
\$499.00	50	Warm

Figure 17: Probability being edited

- Rating field being shown with Drop down menu to select any other for a change

Est. Revenue	Probability	Rating	Partner
\$1,000.00	50	Warm	
\$600.00	80	Warm	
\$5,500.00	60	Hot	
\$250.00	40	Warm	
\$499.00	50	Cold	
\$800.00	40	Warm	
\$499.00	30	Warm	

Figure 18: Rating being shown with drop down menu

- Once the editing is over, click on the Save icon shown below in Red color to enable the CRM data saved. (This save option is for every Individual record / row of data)
- By Clicking on the Save icon shown below in Black rectangle on the menu ribbon, will save all the multiple changes made at one go in the opportunities.

Total Revenue	\$41,233.50	Weighted Revenue	\$46,208.00
<input type="checkbox"/>	<input type="checkbox"/>	Topic	Potential Customer
<input type="checkbox"/>	<input type="checkbox"/>	MTC Dominic Systems Limited Interested In Spell Ch	Dominic Systems Ltd.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	MTC Tieto Spell Checker For Microsoft Dynamics CRM	Tieto
<input type="checkbox"/>	<input type="checkbox"/>	MTC Donaldson Super Grid For Microsoft Dynamics C	Donaldson Company, Inc.
<input type="checkbox"/>	<input type="checkbox"/>	MTC Axxon Interested In Activity Timer Opportunity	Axxon
<input type="checkbox"/>	<input type="checkbox"/>	MTC Madrona Solution Group Editabe Grid Opportuni	Madrona Solutions Group
<input type="checkbox"/>	<input type="checkbox"/>	MTC A Plus Interactive Technology Super Grid Oppor	A Plus Interactive Techno

Figure 19: Save icons to save Data after editing

➤ Once Forecast Manager is selected you will be able to get details as shown below

1. Total Revenue

Total Revenue = Sum of Estimated Revenue

2. Weighted Revenue

Weighted Revenue = Weighted Revenue + (Estimate Cost * (probability / 100))

3. Average Revenue

Average Revenue = Total Revenue / Count

4. Count

Total number of records under selected category (here Open Opportunities)

Opportunities: Open Opportunities ▾	Search for records				
Total Revenue	\$41,233.50	Weighted Revenue	\$46,208.00	Count	50
				Average Revenue	\$825.00

Figure 20: Revenues being shown

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 MTC's low-cost and fixed-rate professional services current rate schedule: 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. 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.

Dynamics Exchange is the leading community free and open to Dynamics 365 / CRM users and professionals for support, training, knowledge, products, and services worldwide.

End User License Agreement (EULA)

Important – Read Carefully. This MTC End-User License Agreement (“**Agreement**”) is a legal agreement between you (on the one hand) and Management Technology Consulting, LLC (**MTC**) and its OEM partner(s). (“**OEM**”) (On the other hand), for the CRM Managed Solution software product identified within (the “**Product**”), which includes computer software and may include printed materials, and online or electronic documentation. By installing, copying, or otherwise using this Product, you agree to be bound by the terms of this Agreement. If you, the End-User, do not agree to the terms of this Agreement, do not install or use this Product.

This license is not a sale. Title and copyrights to the Product remain with MTC and its OEM partner (s). Unauthorized copying of the data, or failure to comply with the provisions of this License Agreement, will result in automatic termination of this license and will make available to MTC and its OEM partner(s), other legal remedies.

IN THE EVENT OF LICENSE TERMINATION, ALL MATERIALS, DATABASES, AND DOCUMENTATION MUST BE IMMEDIATELY RETURNED TO MANAGEMENT TECHNOLOGY CONSULTING LLC WITH THE ADDRESS LISTED AT THE END OF THIS AGREEMENT.

1. End-User represents and warrants that it is authorized and empowered to enter into this Agreement. Represents and Warrants that it is authorized and empowered to grant the rights hereinafter set forth.
2. Management Technology Consulting, LLC and its OEM partner(s) hereby grants End-User a non-exclusive, non-transferable right to use the Product, subject to the use restrictions and limitations set forth in Section 5 and Section 6 below.
3. MTC shall provide End-User with one (1) machine-readable copy of the Product.
4. End-User acknowledges that the Product is confidential, proprietary material owned and copyrighted by MTC. End-User agrees that MTC and its OEM partner(s) shall retain exclusive ownership of the Product, including all literary property rights, patents, copyrights, trademarks, trade secrets, trade names, or service marks, including goodwill and that MTC may enforce such rights directly against End-User in the event the terms of this agreement are violated.
5. The Product is intended for use solely by End-User for their own internal purposes. The Product may only be used on the CRM Organizational Unit licensed and paid for by End-User to the MTC. End-User agrees not to copy, modify, sub-license, assign, transfer or resell the Product, in whole or in part. End-User agrees not to translate, reverse engineer, decompile, disassemble, or make any attempt to discover the source code of the Product (except and only to the extent applicable law prohibits such restrictions). End-User further agrees not to download/upload the Product, in whole or in part, or to establish a network, place data on the Internet, or offer a service bureau utilizing the Product. End-User agrees to restrict access to the Product to designated employees and to use its best efforts to prevent violation of these restrictions by agents, employees and others, taking such steps and reasonable security precautions as may be necessary. End-User shall permit MTC and/or its representative access to its premises during normal business hours to verify compliance with the provisions of this Agreement.
6. This license authorizes use of the Product on a single CRM Organizational Unit, which shall mean a single Organizational Unit
CONFIDENTIALITY NOTICE - The information contained in this document is confidential and proprietary. This document is to be used with the understanding that it will be held in strict confidence and not used for reasons unrelated directly to the specific purpose of this document. No part of the document may be circulated or reproduced for distribution outside the Client organization without prior written permission from Management Technology Consulting LLC.
7. This Agreement shall remain in force as long as the End-User using the Product is paying the applicable MTC Annual Maintenance and Support fee. Failure to pay the periodic maintenance fee shall cause this agreement to expire. MTC or End-User may terminate use of the Product and this Agreement by written notice, at least thirty (30) days prior to the termination. Within thirty (30) days after expiration or notice of termination of the Agreement, End-User shall return to MTC, postage prepaid all copies of the Product. Continued use of the Product or any information contained therein or supplied under this Agreement after termination, or expiration of this Agreement is expressly prohibited.
8. All UPDATES provided by MTC and its affiliates shall be considered part of the Product and subject to the terms and conditions of this Agreement. Additional license terms may accompany UPDATES. By installing, copying, or otherwise using any UPDATE, End-User agrees to be bound by this Agreement and any terms accompanying each such UPDATE. If End-User

does not agree to the additional license terms accompanying such UPDATES, do not install, copy, or otherwise use such UPDATES.

9. End-User agrees that MTC and its affiliates may collect and use technical information End-User provide as a part of support services related to the Product.
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.
11. MTC REPRESENTS THAT THE PRODUCT DOES NOT VIOLATE OR INFRINGE ANY PATENT, TRADEMARK, TRADE SECRET, COPYRIGHT, OR SIMILAR RIGHT. IN THE EVENT THE PRODUCT IS HELD TO INFRINGE THE RIGHTS OF ANY THIRD PARTY, MTC SHALL HAVE THE OPTION EITHER TO PROCURE THE RIGHT FOR THE END-USER TO CONTINUE USING THE PRODUCT OR AT NODUS'S EXPENSE, TO REPLACE OR MODIFY THE PRODUCT SO THAT IT BECOMES NON-INFRINGEMENT. MTC AND ITS OEM PARTNER(S) MAKE NO OTHER WARRANTY, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE ACCURACY OF THE PRODUCT, THE MERCHANTABILITY AND FITNESS OF THE PRODUCT FOR A PARTICULAR PURPOSE. FURTHER, MTC DOES NOT WARRANT THE COMPATIBILITY OF THE PRODUCT WITH END-USER'S COMPUTER HARDWARE AND/OR SOFTWARE SYSTEM.
12. End-User's sole and exclusive remedy for any damage or loss in any way connected with the Product furnished herein, whether by breach of warranty, negligence, or any breach of any other duty, shall be, at MTC's' option, replacement of the Product or return or credit of an appropriate portion of any payment made by End-User with respect to such Product. Under no circumstances shall MTC or its OEM Partner(s) be liable to End-User or any other person for any indirect, special or consequential damages of any kind, including, without limitation, damages for loss of goodwill, work stoppage, computer failure or malfunction or any and all other commercial damages or losses. Additionally, MTC assumes no liability for damages caused by incorrect parts usage and has no responsibility to verify that the parts are correct for a customer's vehicle in accordance with the manufacturers' specifications.
13. MTC may cancel this license at any time if End-User fails to comply with the terms and conditions of this Agreement; and MTC may obtain injunctive relief and may enforce any other rights and remedies to which it may be entitled in order to protect and preserve its proprietary rights.
14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.
15. No term or provision hereof shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. Any consent by any party to, or waiver of, a breach by the other, whether express or implied, shall not constitute consent to, waiver of, or excuse for any other different or subsequent breach.

CONFIDENTIALITY NOTICE - The information contained in this document is confidential and proprietary. This document is to be used with the understanding that it will be held in strict confidence and not used for reasons unrelated directly to the specific purpose of this document. No part of the document may be circulated or reproduced for distribution outside the Client organization without prior written permission from Management Technology Consulting LLC

A. Limitation of Liability

IN NO EVENT WILL MTC OR ITS OEM PARTNER(S) BE LIABLE FOR ANY DAMAGES, INCLUDING LOSS OF DATA, LOST PROFITS, COST OF COVER, OR OTHER SPECIAL, INCIDENTAL, CONSEQUENTIAL, OR INDIRECT DAMAGES ARISING FROM THE USE OF THE PROGRAM OR ACCOMPANYING DOCUMENTATION, HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY. THIS LIMITATION WILL APPLY EVEN IF MTC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGE. YOU ACKNOWLEDGE THAT THE LICENSE FEE REFLECTS THIS ALLOCATION OF RISK.

B. General

The laws of the State of California shall govern this Agreement. This Agreement is the entire agreement between MTC and End-User concerning the Product and supersedes any other communications or advertising with respect to the program and accompanying documentation. If any provision of the Agreement is held invalid, the remainder of the Agreement shall continue in full force and effect. If you have any questions, please contact in writing: Management Technology Consulting LLC, 7738 Sky hill Drive, Los Angeles, CA 90068, and Tel: (323) 851-5008.

C. Warranty Disclaimer

Management Technology Consulting LLC, Inc. disclaims any warranty regarding the product or and content or examples contained in this documentation and the Managed Solution code, including the warranties of merchantability and fitness for a particular purpose.

D. Limitation of Liability

The content of this manual is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Management Technology Consulting LLC, Inc. Management Technology Consulting LLC, Inc. assumes no responsibility or liability for any errors or inaccuracies that may appear in this manual. Neither Management Technology Consulting LLC, Inc. nor anyone else who has been involved in the creation, production or delivery of this documentation shall be liable for any indirect, incidental, special, exemplary or consequential damages, including but not limited to any loss of anticipated profit or benefits, resulting from the use of this documentation or sample code.

E. Annual Maintenance and Support

Software products offered by Management Technology Consulting LLC, (MTC) include 1 year of Annual Maintenance and support. Annual maintenance includes your right to the latest versions and any updates to this product at no charge during the 1st year of ownership. Future years of Annual Maintenance must be purchased at a fee equal to 25% of the original purchase price of the product. MTC will notify owners of record by email of the Annual Maintenance renewal time and facilitate collection of fees and simultaneously assure the latest versions and updates are in use.

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

Request and receive support online at www.MTCCRM.com Review, order, fund, track, and manage your solution needs online securely, conveniently, affordably 24/7 with MTC online. MTC is a leader in CRM customer web Portal offerings in connected Dynamics 365 / CRM enterprise solutions for social and business transactions— see solutions in action as you get what you need from MTC online on your time.