

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

**For Microsoft AppSource Users**

[www.appsource.com](http://www.appsource.com)



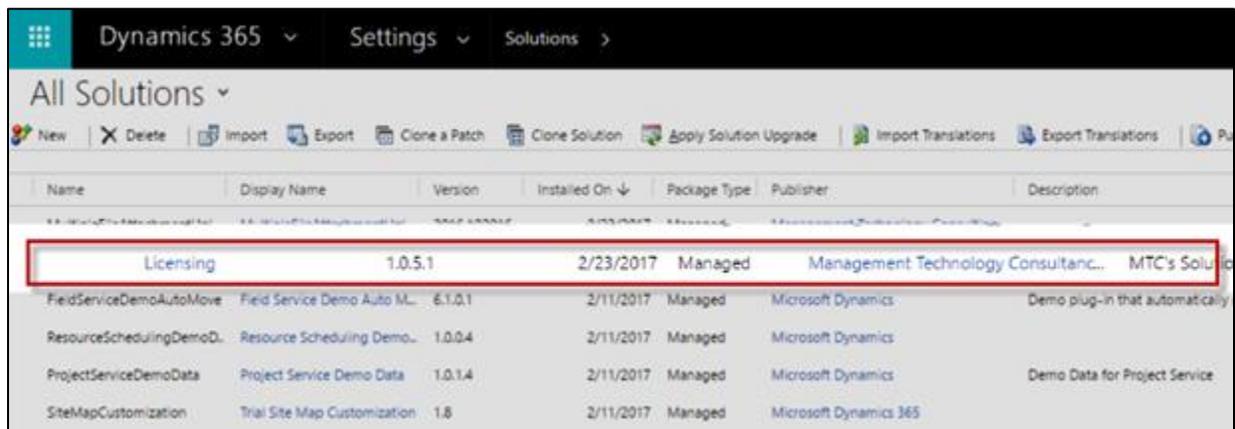
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## Product Free Trial Help Instructions

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

<p>First Name*</p> <input type="text" value="Andy"/>	<p>Last Name*</p> <input type="text" value="Wilson"/>
<p>Company</p> <input type="text" value="Manpower Argo Avenue Serv"/>	<p>Phone</p> <input type="text" value="4562358956"/>
<p>Website</p> <input type="text" value="www.maas.com"/>	<p>Email*</p> <input type="text" value="andyw@maas.com"/>
<p>City</p> <input type="text" value="Birmingham"/>	<p>State/Province</p> <input type="text" value="West Midlands"/>
<p>Country</p> <input type="text" value="England"/>	<p>Zip/Postal Code</p> <input type="text" value="500045"/>

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.

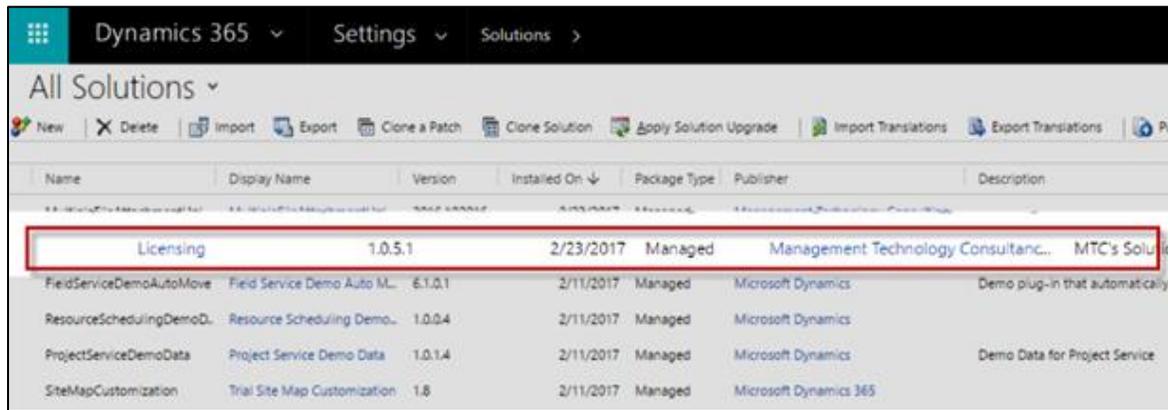
Products	Expiry Date	No of Users			
Email To Case			<a href="#">Get it Now</a>		
Export DataTool			<a href="#">Get it Now</a>		
Global Search			<a href="#">Get it Now</a>		
Go To Webinar			<a href="#">Get it Now</a>		
Group Calendar			Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
Mail Merge			<a href="#">Get it Now</a>		
Notes Rollup			<a href="#">Get it Now</a>		

In case of any issues or enquiries, please write to [sales@mtccrm.com](mailto: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**

**Solution Licensing**

**ACCOUNT INFORMATION**

First Name\*  Last Name\*

Company  Phone

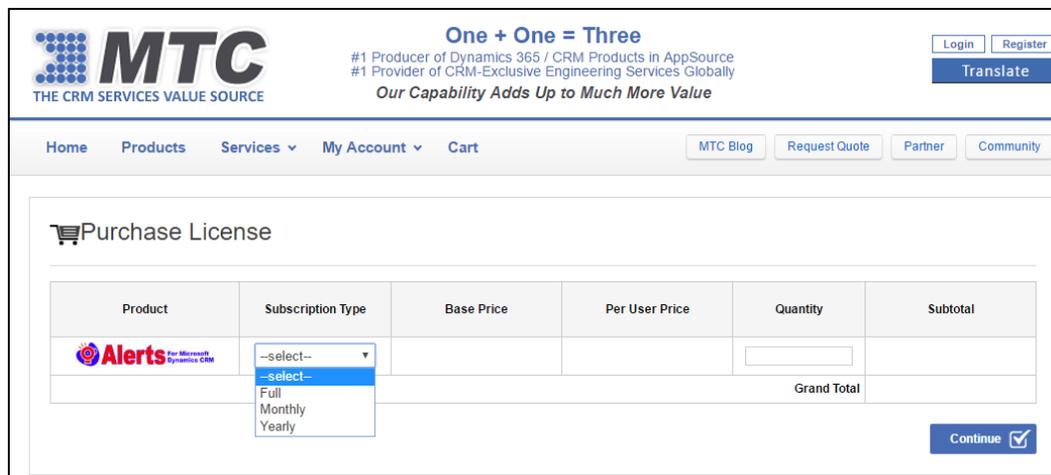
Website  Email\*

City  State/Province

Country  Zip/Postal Code

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

- 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.



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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

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	--select-- --select-- Full Monthly Yearly			<input type="text"/>	
Grand Total					

6. Click on **Continue**.

 Purchase License

Product	Subscription Type	Base Price	Per User Price	Quantity	Subtotal
	Monthly <span style="font-size: small;">▼</span>	\$0.00	\$1.00	1	\$1.00
<b>Grand Total</b>					\$1.00

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



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**INVOICE**  
SUMMARY LINE ITEMS  
Invoice : XXXXXX

---

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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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
<b>Total</b>				<b>\$1.00</b>



For any queries contact - [Salesteam@mtccrm.com](mailto: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.



### 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
<b>Total</b>			<b>\$1.00</b>

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 : XXXXXX

---

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: Michelle Lee  
 Email: my\_123@mtccrm.com  
 Requesting Contact  
ABC

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 Community: [www.DynamicsExchange.com](http://www.DynamicsExchange.com)

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

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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**Thank You for Your Business!**

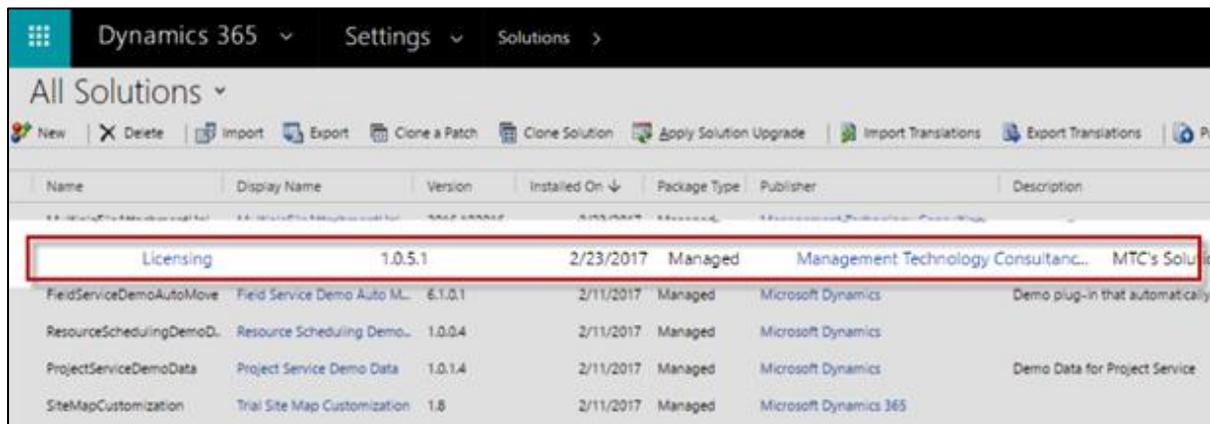
14. Finally, go to licensing solution page and click on **Update License** link to see the expiry date and no. of users being reflected.

In case of any issues or enquiries, please write to [sales@mtccrm.com](mailto: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				<a href="#">Get it Now</a>	
Web To Crm Forms				<a href="#">Get it Now</a>	
Notes Rollup	4/24/2017	1	Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
<b>CRMStarterPack</b>				<a href="#">Purchase As Bundle</a>	<a href="#">Update License</a>
Activity Calendar				<a href="#">Get it Now</a>	
Alerts			Installed	<a href="#">Buy more License</a>	<a href="#">Update License</a>
CRM Picture			Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
Report To PDF			Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
Auto Number			Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>
Note Pro				<a href="#">Get it Now</a>	
<b>EmailManagementBundle</b>				<a href="#">Purchase As Bundle</a>	<a href="#">Update License</a>
Email Signature				<a href="#">Get it Now</a>	
Email To Case				<a href="#">Get it Now</a>	

3. Click on **Buy More License** link against the product (E.g. Alerts).
4. 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
<b>Grand Total</b>					<b>\$1.00</b>

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



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**INVOICE**  
SUMMARY LINE ITEMS  
Invoice : 0000000000

---

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

California  
CA-91409  
USA

Contact: [Redacted]  
Email: [Redacted]  
Requesting Contact  
[Redacted]

Currency  
US Dollar

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MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Thru	Terms
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

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** 
[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**      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
<b>Total</b>			<b>\$1.00</b>

10. 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 : [REDACTED]

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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

100  
California  
Costa Mesa  
USA  
 Contact: Michelle Lee  
 Email: [my\\_100@mtccrm.com](mailto:my_100@mtccrm.com)  
 Requesting Contact  
 Alex

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MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Till	Terms
100000	1000000001	100@mtccrm.com			MTC - Alex - 07/05/17	07/05/17	08/05/17	120 120

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

July-05-17 ~~CR-10000~~ Paid by Credit card ending ...5016 – Thank You!



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**Thank You for Your Business!**

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

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