



Dynamics 365 / CRM / XRM Platform



## User Guide



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

CRM Notes Rollup for Dynamics 365 / CRM is a Managed Solution add-in that adds enhanced capability to CRM by gathering all Notes & Attachments in to one single Entity of the CRM. It's a self-install set-up. CRM Notes Rollup will capture all kinds of Notes and attachments from other 1: N entities to the parent record.

Coding Version	: 1.0.0.5
Document Version	: 1.0.0.5
Date of Document	: 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

<b>COPYRIGHT .....</b>	<b>2</b>
<b>DISCLAIMER .....</b>	<b>2</b>
<b>INSTALLATION PROCESS .....</b>	<b>5</b>
Installing Licensing Solution .....	6
Installing Notes Rollup Solution.....	8
How to get License Key? .....	10
Activating License Key.....	12
<b>DYNAMICS 365 SOLUTION - TRIAL LICENSE ACTIVATION/ PRODUCT LICENSE PURCHASE/ ADDITIONAL USER LICENSE PURCHASE .....</b>	<b>14</b>
<b>CONFIGURATION SETTINGS .....</b>	<b>15</b>
<b>NOTES ROLLUP FUNCTIONALITY .....</b>	<b>18</b>
Selection of Entity .....	18
Search Option.....	19
Display Attachments .....	19
Display Favorites.....	20
Display Notes.....	21
<b>UNINSTALLATION PROCESS .....</b>	<b>21</b>
<b>MTC OVERVIEW .....</b>	<b>23</b>
The Global CRM Community DynamicsExchange.com .....	23
End User License Agreement (EULA) .....	24

## Table of Figures

Figure 1: Import Solution .....	5
Figure 2 : Select Solution Package .....	6
Figure 3: Importing Options window .....	6
Figure 4: Import Option .....	7
Figure 5: Importing Solution – Licensing.....	7
Figure 6 : Select Solution Package .....	8
Figure 7 : Solution Information .....	8
Figure 8: Importing Solution .....	9
Figure 9: Developer Resources .....	10
Figure 10: Organization Unique Name .....	10
Figure 11: Configuration Screen .....	12
Figure 12: Licensing the Product.....	13
Figure 13: Notes Rollup Solution .....	15
Figure 14: Settings .....	15
Figure 15: Notes Rollup Configuration Page .....	16
Figure 16: Notes Settings.....	16
Figure 17: Settings Area .....	17
Figure 18: Account form showing Selection of Entity .....	18
Figure 19: Account form showing Search facility.....	19
Figure 20: Account form showing Attachments .....	20
Figure 21: Account form showing Favorites .....	20
Figure 22: CRM Account form showing all Notes .....	21
Figure 23: Uninstallation process .....	21
Figure 24: Uninstall Solution .....	22

## Installation Process

To install the Notes Rollup solution, the following steps are to be followed.

### STEP 1:

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

### STEP 2:

- On Downloading you will get **Notes Rollup Solution (IP file)**.
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.



NotesRollUp\_1\_0\_0\_4\_managed.zip



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

NOTE: To install the **Notes Rollup, Solution** need to be imported into CRM

### STEP 3:

- To import the solution Open your CRM click on **SETTINGS→SOLUTION**.

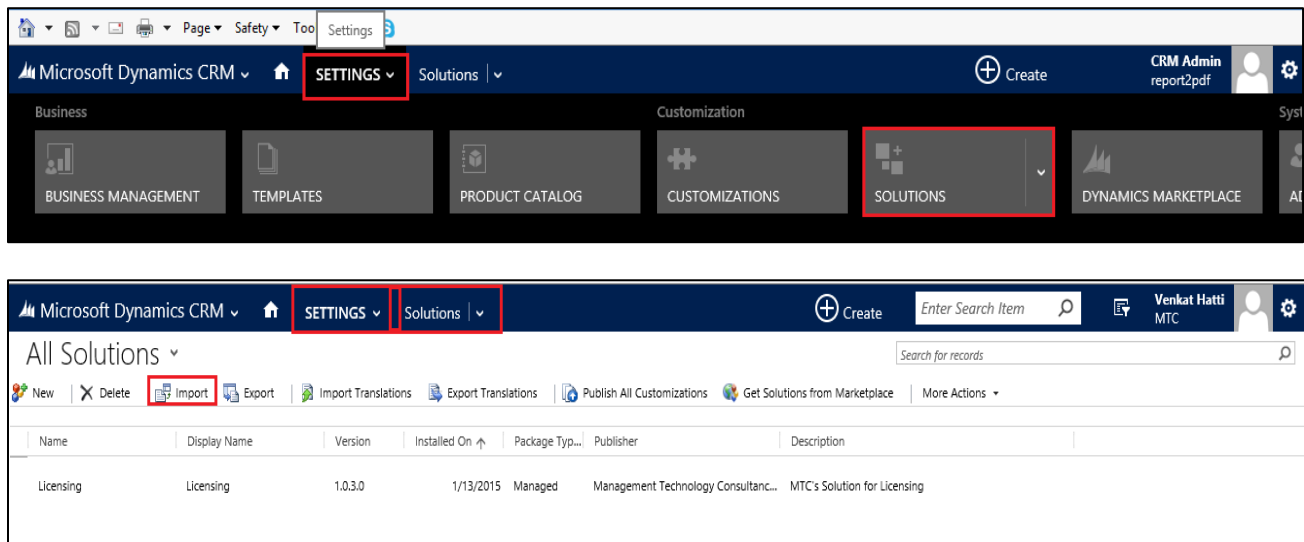


Figure 1: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
- First Install the Licensing Solution and later followed by Notes Rollup Solution.

## Installing Licensing Solution

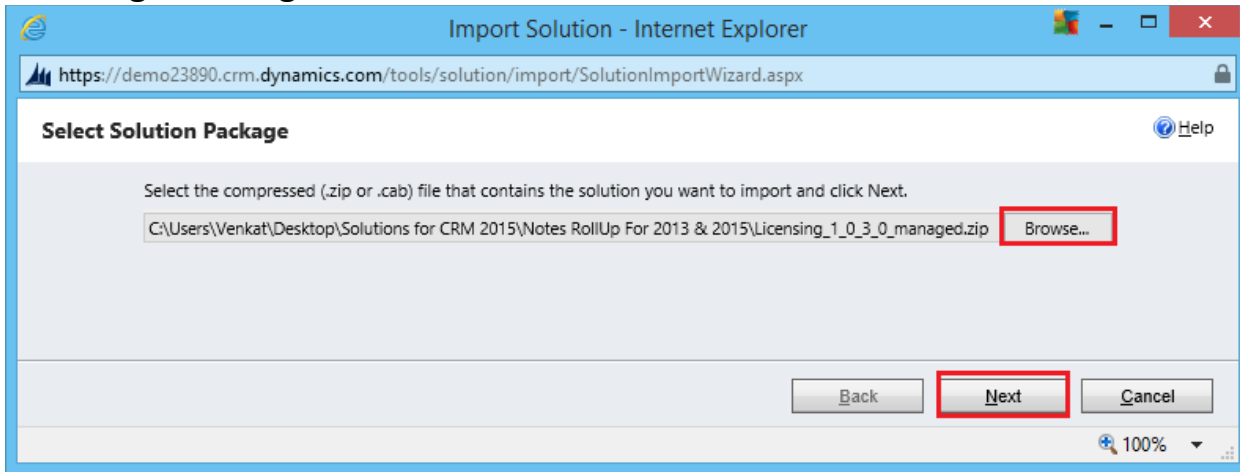


Figure 2 : Select Solution Package

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

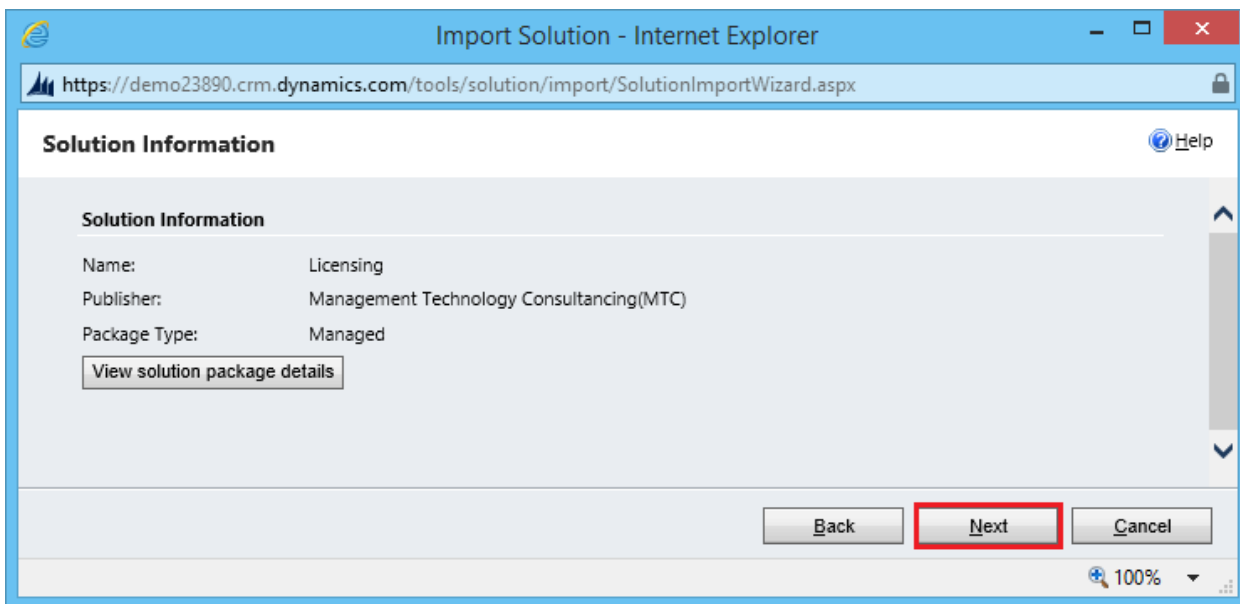


Figure 3: Importing Options window

- Click on Next to proceed.

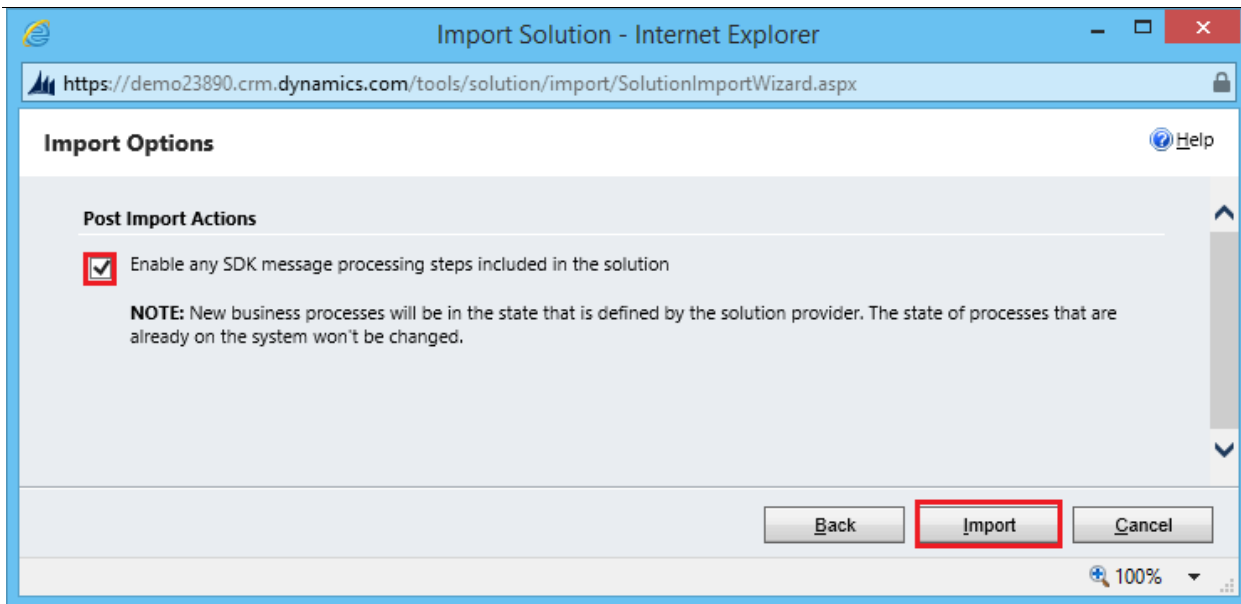


Figure 4: Import Option

- Click on Next to proceed.

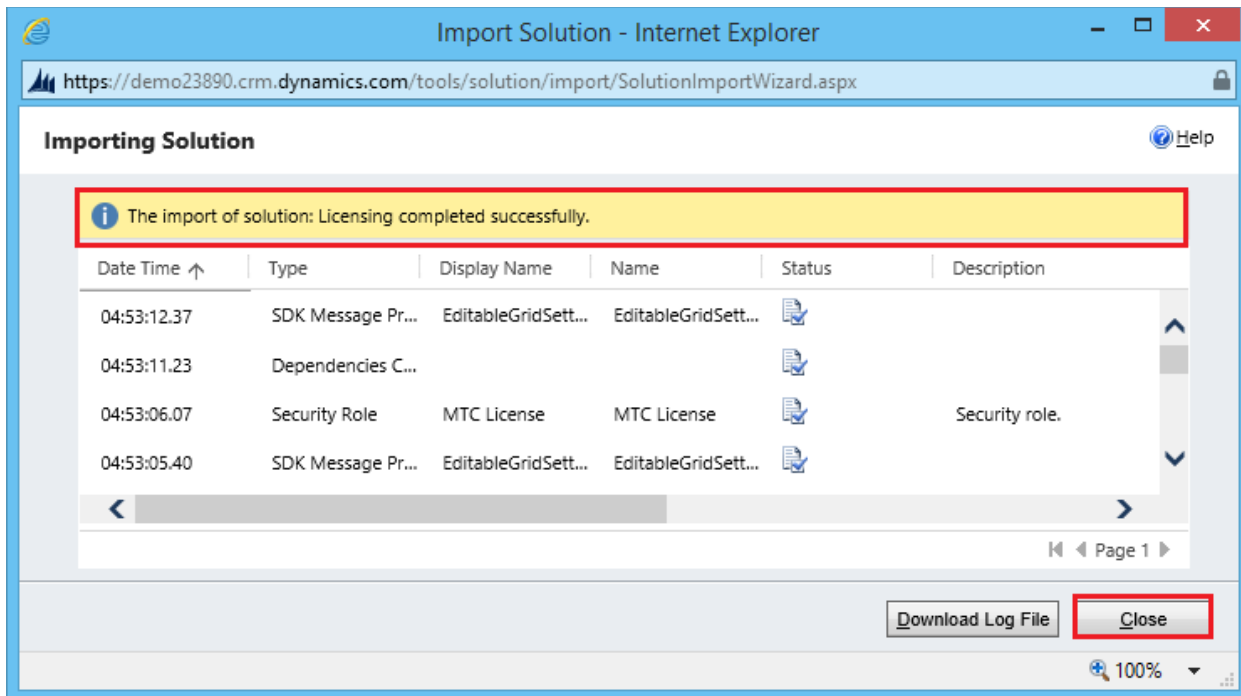


Figure 5: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

## Installing Notes Rollup Solution

- Go to **Setting**→**Solution** and Click on **Import**.

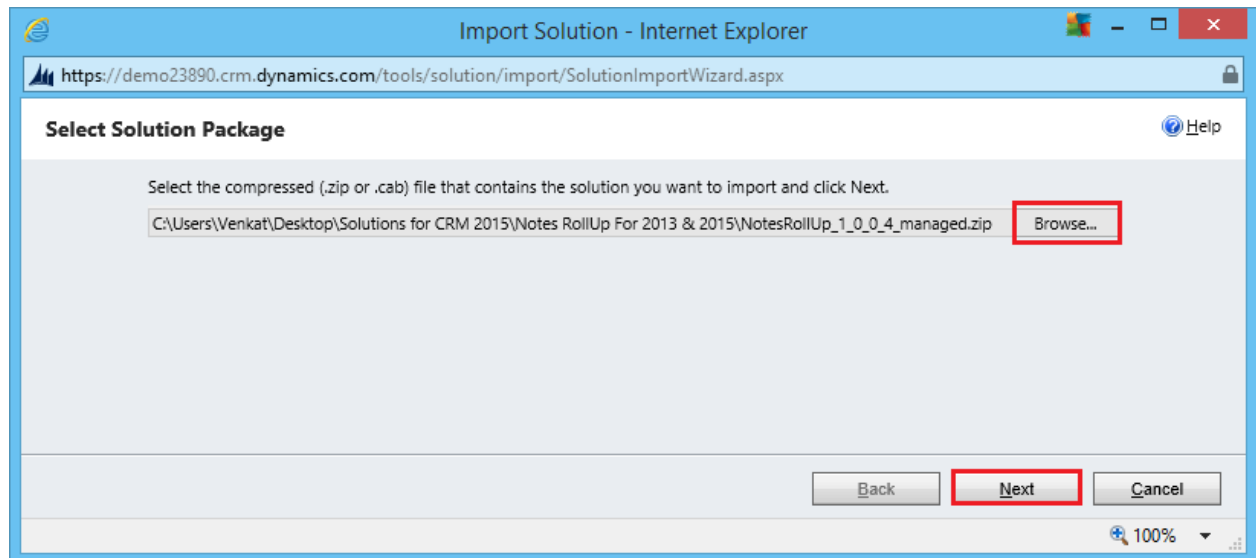


Figure 6 : Select Solution Package

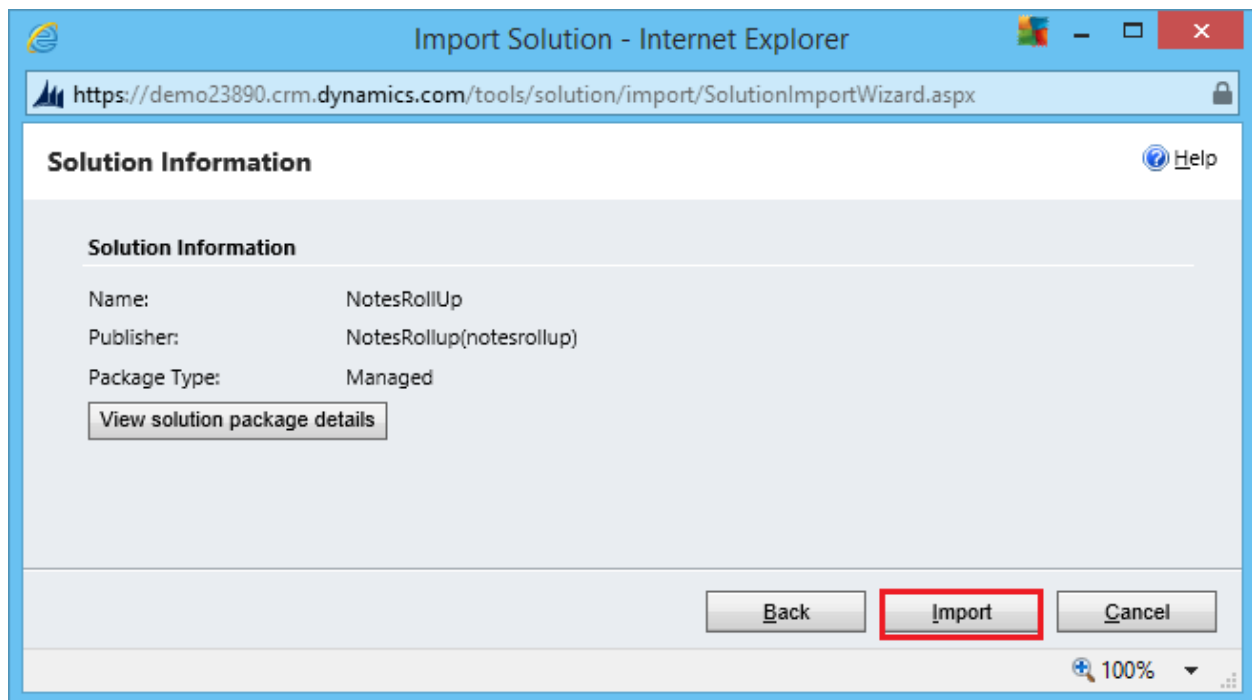


Figure 7 : Solution Information



- Click on Import 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.

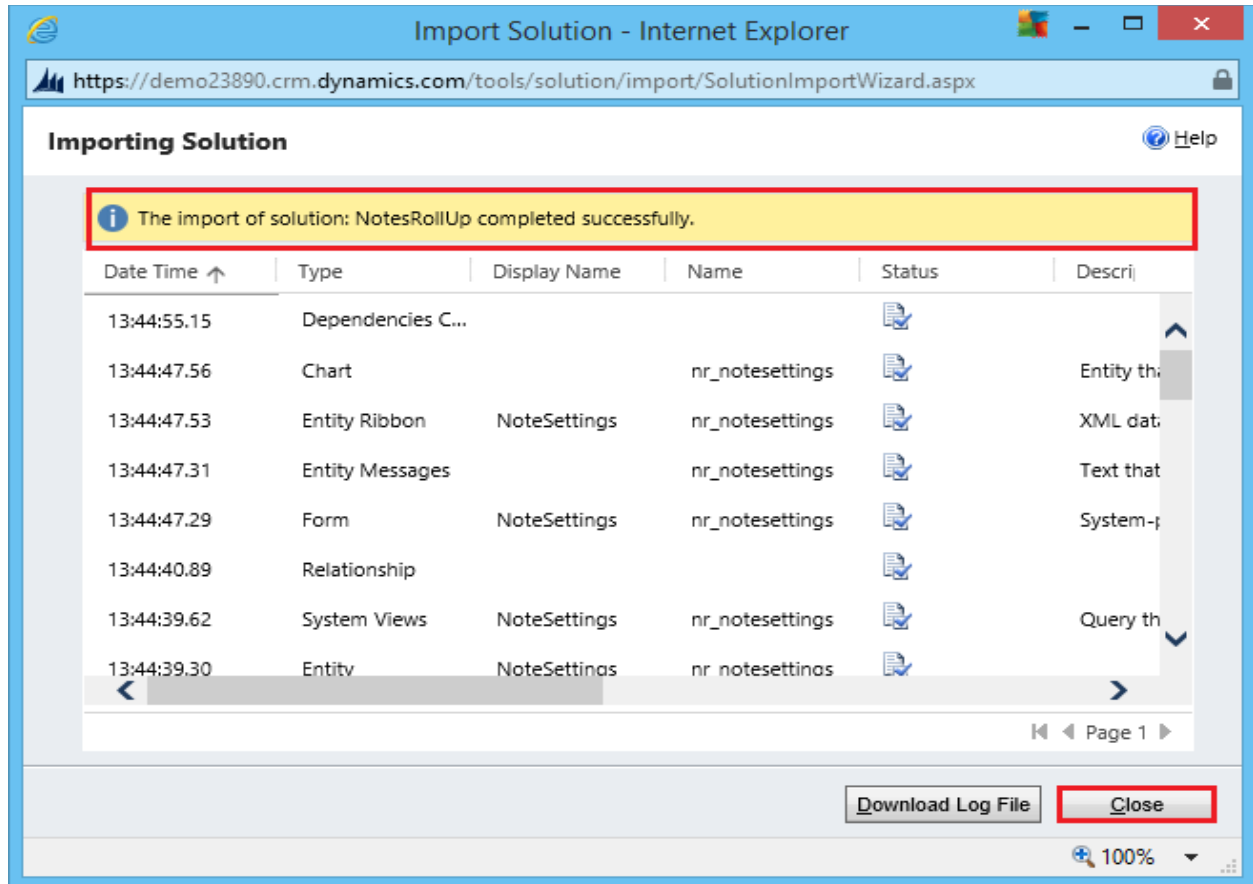
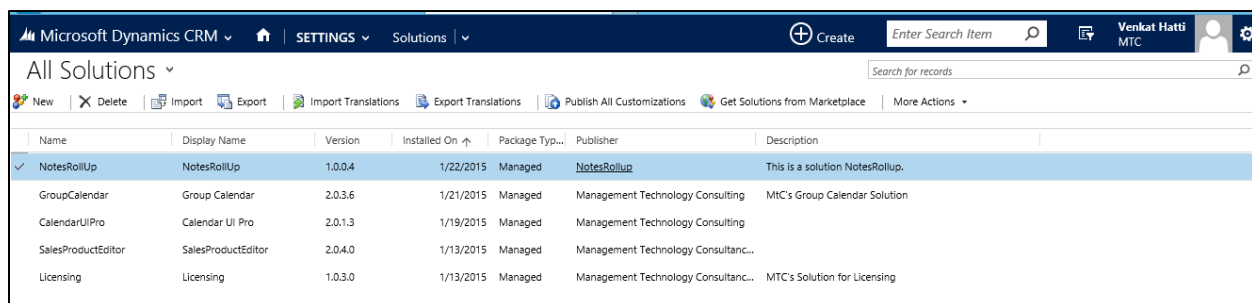


Figure 8: Importing Solution

- Click on Close and Refresh the CRM to see both the solutions.
- After importing the Notes Rollup Solution you need to place the License key navigate to **Settings**→**Solution**→Click on **Notes Rollup Solution**.



Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
✓ NotesRollUp	NotesRollUp	1.0.0.4	1/22/2015	Managed	NotesRollUp	This is a solution NotesRollUp.
GroupCalendar	Group Calendar	2.0.3.6	1/21/2015	Managed	Management Technology Consulting	MTC's Group Calendar Solution
CalendarUIPro	Calendar UI Pro	2.0.1.3	1/19/2015	Managed	Management Technology Consulting	
SalesProductEditor	SalesProductEditor	2.0.4.0	1/13/2015	Managed	Management Technology Consultanc...	
Licensing	Licensing	1.0.3.0	1/13/2015	Managed	Management Technology Consultanc...	MTC's Solution for Licensing

## How to get License Key?

- To install Notes Rollup for Dynamics 365 / CRM you will require License Key, which you can get by sending an E-mail 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.

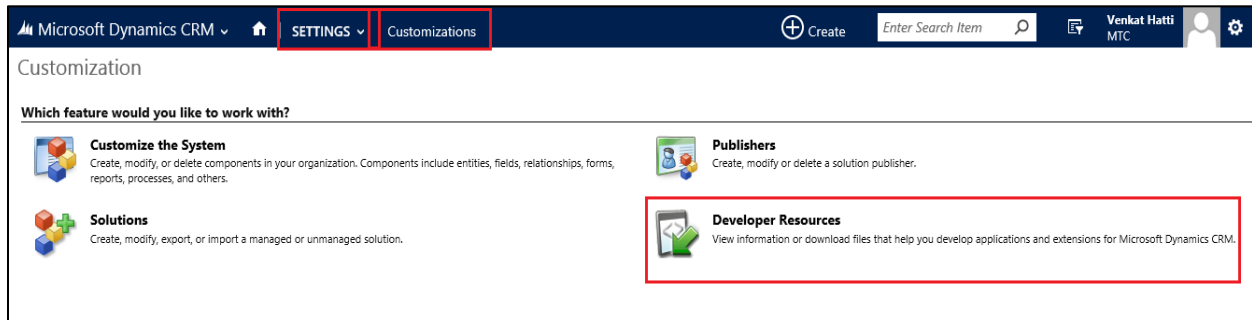


Figure 9: Developer Resources

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

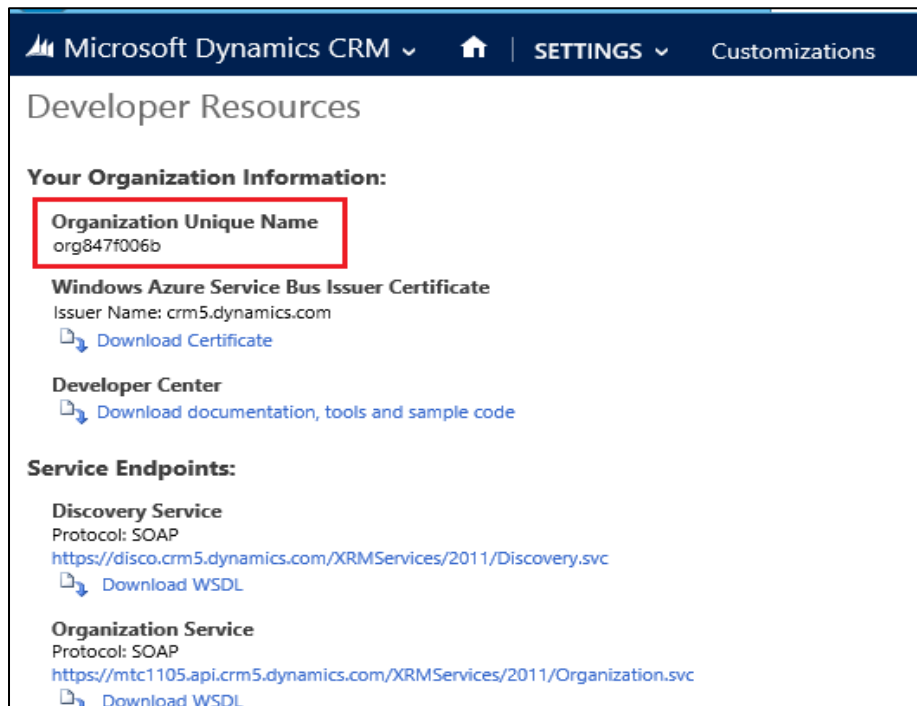


Figure 10: Organization Unique Name

- Send this Organization Unique Name through Email to [salesteam@mtccrm.com](mailto:salesteam@mtccrm.com) and you will receive your Licensing Key within 24 hours.

---

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

## Activating License Key

- Double click on Notes Rollup Solution, which opens a new screen as shown below.

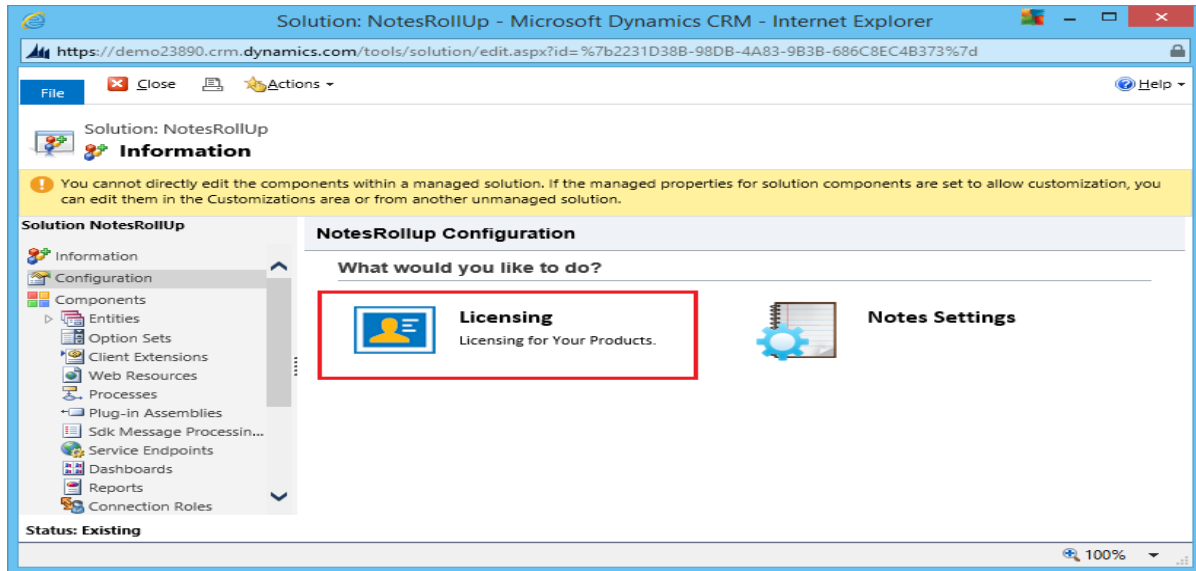
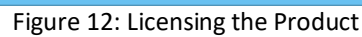


Figure 11: Configuration Screen



- Select Product as Notes Rollup from the drop down list
- Enter the License key which you have received after placing the request
- Click on Submit tab
- Once License is accepted click ok to finish Installation process of the product.
- Refresh the CRM ( Press F5)

---

## **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.

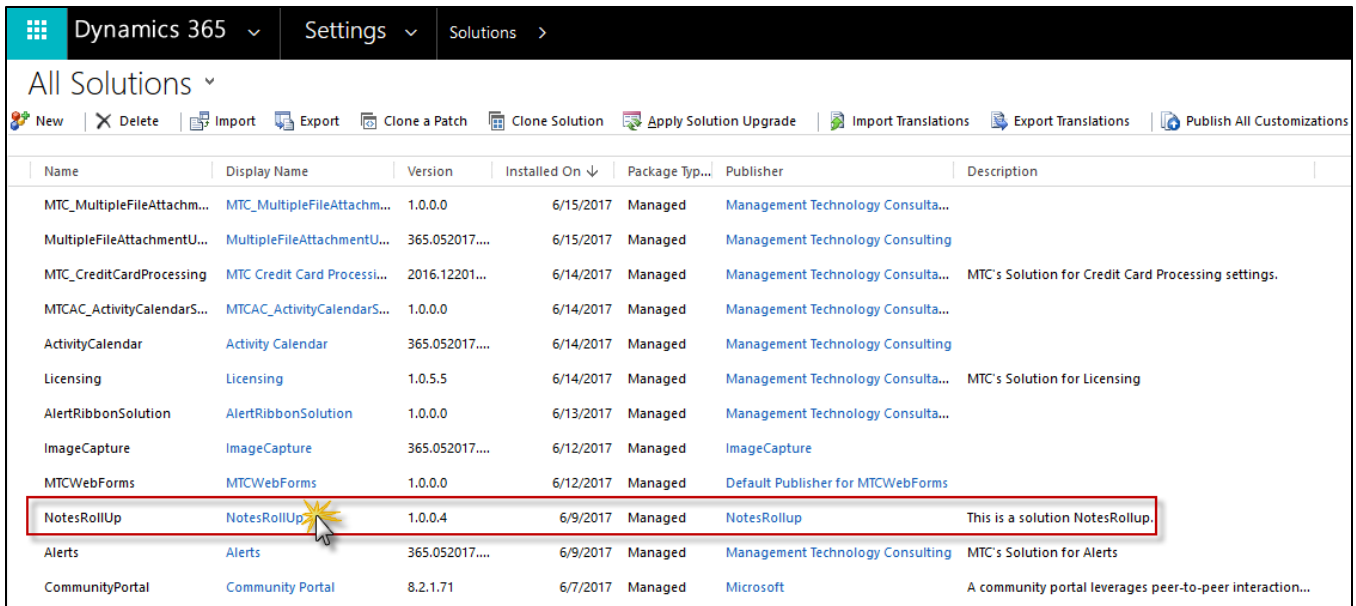
<https://www.mtccrm.com/PLI>

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

## Configuration Settings

In order to use Notes Rollup, you are required to do some basic configuration settings as discussed below. These configuration settings is a one-time activity and you can always go for different settings as per your requirements.

- Firstly, go to Solutions Page. Use navigation **Settings → Solutions**.
- Double click on Notes Rollup solution.



Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
MTC_MultipleFileAttachm...	MTC_MultipleFileAttachm...	1.0.0.0	6/15/2017	Managed	Management Technology Consulta...	
MultipleFileAttachmentU...	MultipleFileAttachmentU...	365.052017....	6/15/2017	Managed	Management Technology Consulting	
MTC_CreditCardProcessing	MTC Credit Card Process...	2016.12201...	6/14/2017	Managed	Management Technology Consulta...	MTC's Solution for Credit Card Processing settings.
MTCAC_ActivityCalendarS...	MTCAC_ActivityCalendarS...	1.0.0.0	6/14/2017	Managed	Management Technology Consulta...	
ActivityCalendar	Activity Calendar	365.052017....	6/14/2017	Managed	Management Technology Consulting	
Licensing	Licensing	1.0.5.5	6/14/2017	Managed	Management Technology Consulta...	MTC's Solution for Licensing
AlertRibbonSolution	AlertRibbonSolution	1.0.0.0	6/13/2017	Managed	Management Technology Consulta...	
ImageCapture	ImageCapture	365.052017....	6/12/2017	Managed	ImageCapture	
MTCWebForms	MTCWebForms	1.0.0.0	6/12/2017	Managed	Default Publisher for MTCWebForms	
NotesRollUp	NotesRollUp	1.0.0.4	6/9/2017	Managed	NotesRollup	This is a solution NotesRollup.
Alerts	Alerts	365.052017....	6/9/2017	Managed	Management Technology Consulting	MTC's Solution for Alerts
CommunityPortal	Community Portal	8.2.1.71	6/7/2017	Managed	Microsoft	A community portal leverages peer-to-peer interaction...

Figure 13: Notes Rollup Solution

- Notes Rollup configuration window pops up.

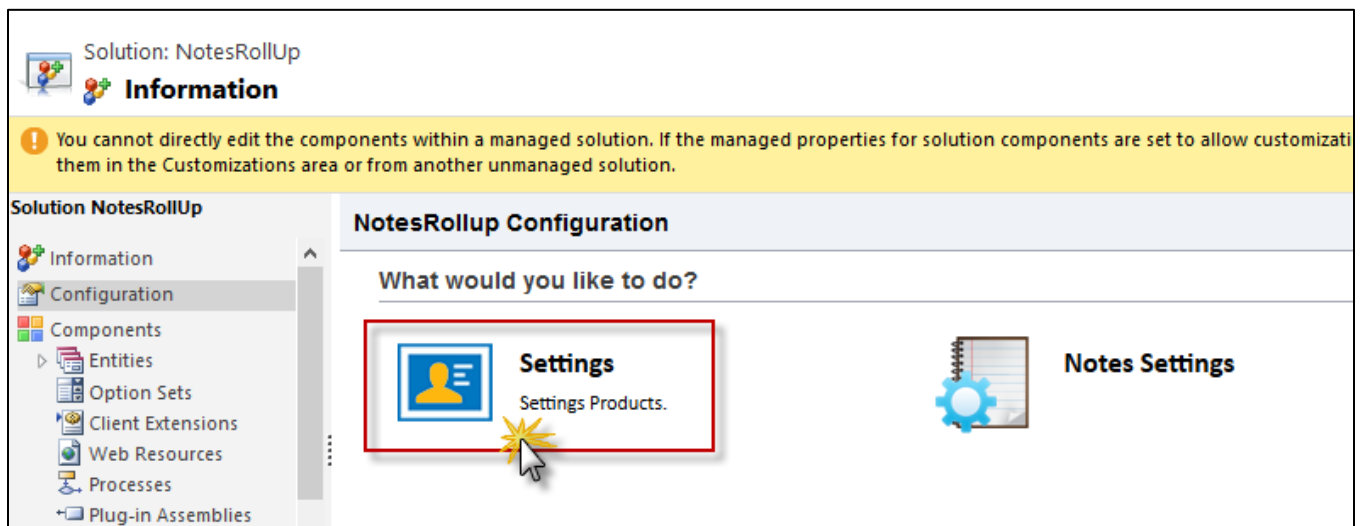


Figure 14: Settings

- Click on Settings to view the Notes Rollup Configuration page with the list of Available Entities.

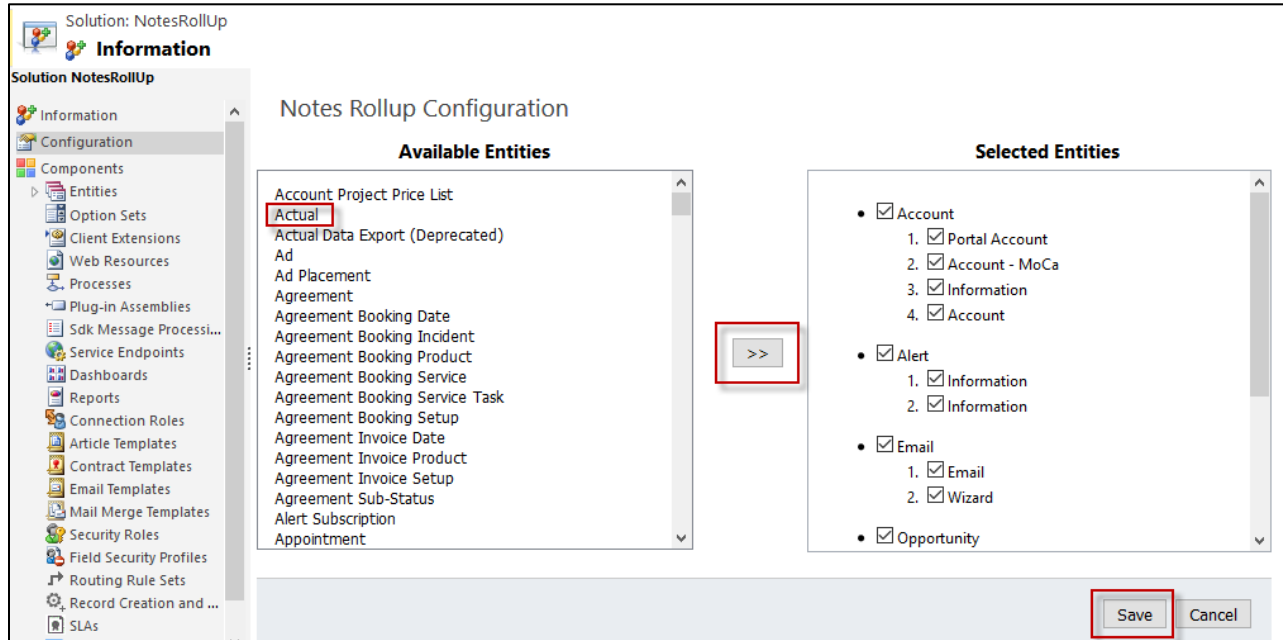


Figure 15: Notes Rollup Configuration Page

- From the left hand side pane of Available Entities, you can select the entities of your choice on which you want to apply Notes Rollup solution. Then click on the double arrow to see the entity getting reflected on the right hand side pane of Selected Entities. You can select as many entities as you wish following the same process and finally click on the **Save** button as highlighted in the above image.
- Now go back to the configuration window and click on Notes Settings.

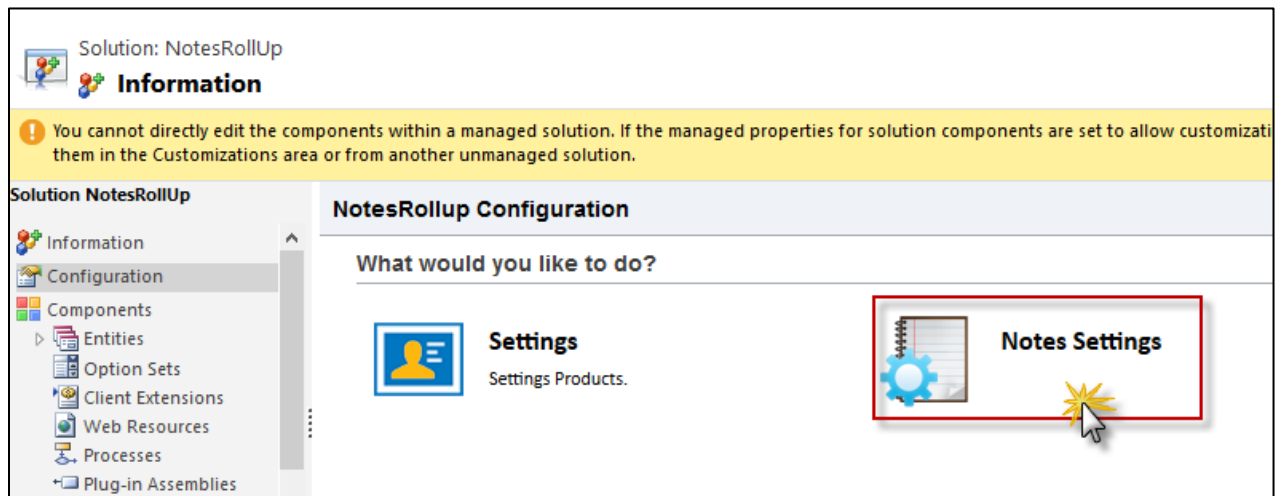
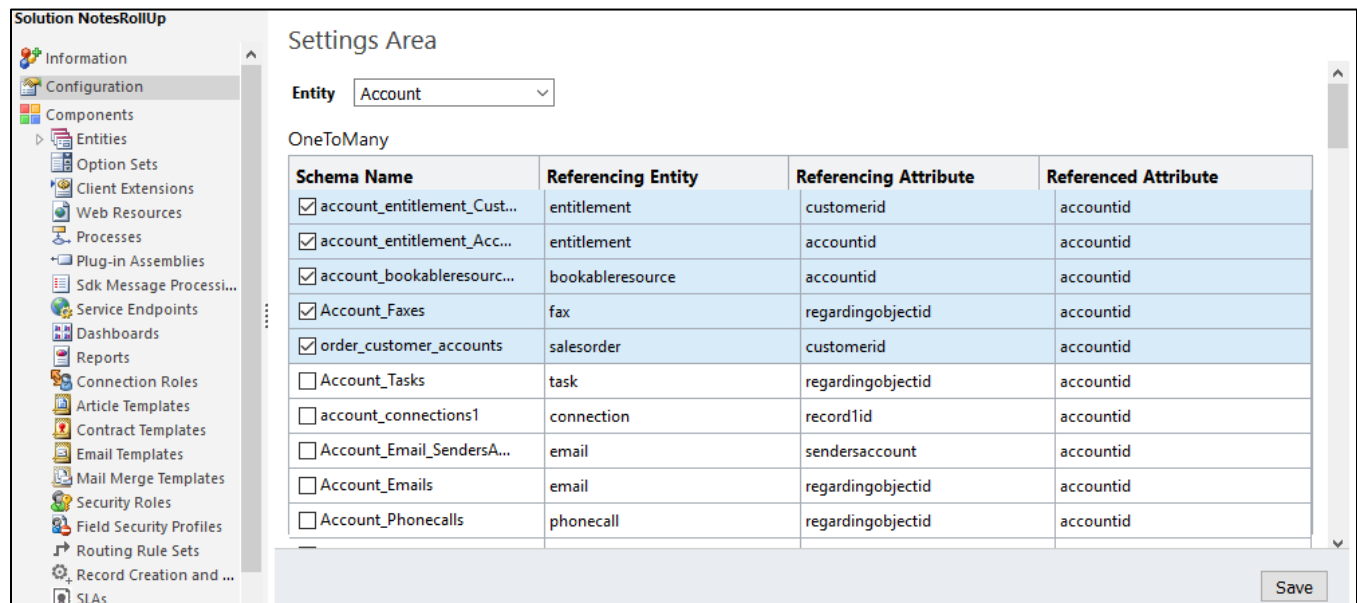


Figure 16: Notes Settings



- Settings Area page shows up where you can select the Entity from the drop down menu for applying one-to-many relationships.



**Settings Area**

Entity: Account

OneToMany

Schema Name	Referencing Entity	Referencing Attribute	Referenced Attribute
<input checked="" type="checkbox"/> account_entitlement_Cust...	entitlement	customerid	accountid
<input checked="" type="checkbox"/> account_entitlement_Acc...	entitlement	accountid	accountid
<input checked="" type="checkbox"/> account_bookableresourc...	bookableresource	accountid	accountid
<input checked="" type="checkbox"/> Account_Faxes	fax	regardingobjectid	accountid
<input checked="" type="checkbox"/> order_customer_accounts	salesorder	customerid	accountid
<input type="checkbox"/> Account_Tasks	task	regardingobjectid	accountid
<input type="checkbox"/> account_connections1	connection	recordid	accountid
<input type="checkbox"/> Account_Email_SendersA...	email	sendersaccount	accountid
<input type="checkbox"/> Account_Emails	email	regardingobjectid	accountid
<input type="checkbox"/> Account_Phonecalls	phonecall	regardingobjectid	accountid

Save

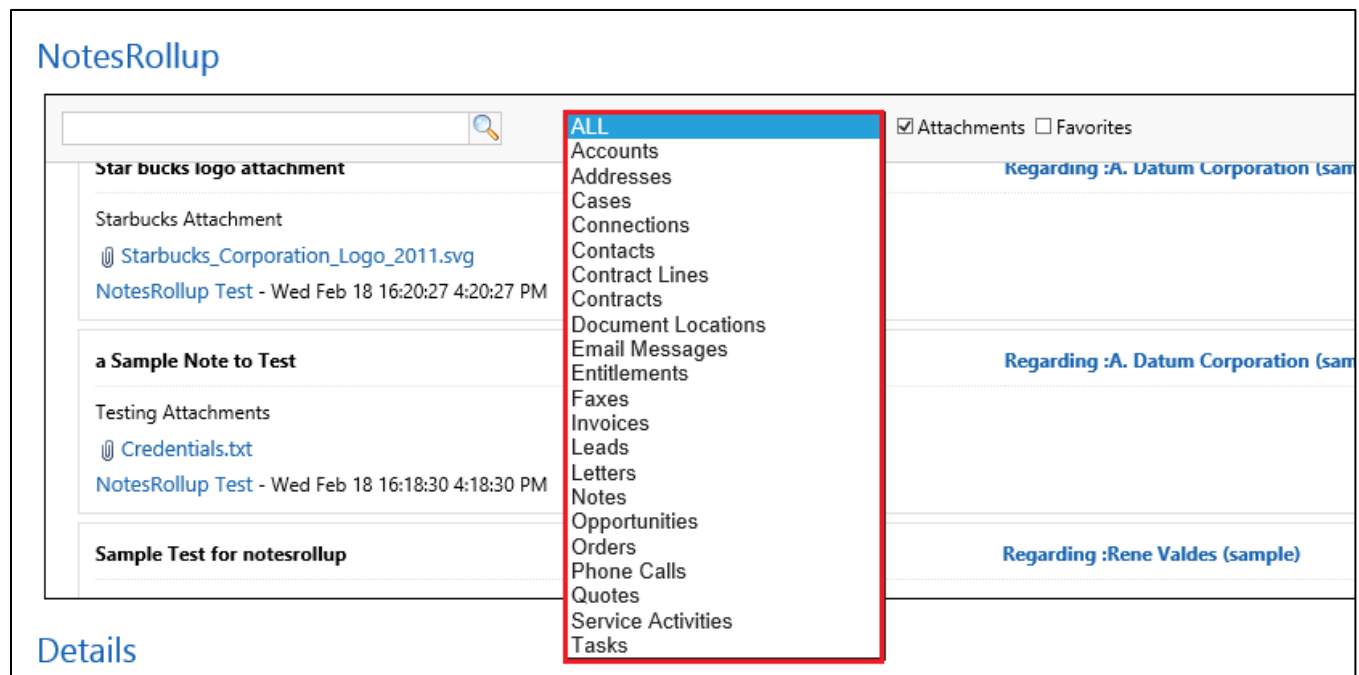
Figure 17: Settings Area

- Finally, click on **Save** button.

## Notes Rollup Functionality

- Let us take Account entity as an example for testing the Notes Rollup functionality. Remember Account entity has already been configured from the configuration settings window.
- Open the Account form.
- Scroll down to Notes Rollup Area
- You can filter your displays for Attachment or Favorites.
- In Notes Rollup area you will find the Search option to find any notes or attachments.
- All Notes with 1:N relationship are displayed as per choice of selection from the Settings Area
- All Attachments of the other selected entities are also listed and recorded in this area.
- On double click of the Notes displayed, it navigates to CRM form where you can make any changes if required on the CRM and the same is saved here also.
- Similarly on clicking the Attachment shown here it downloads the file on to you system.
- It's easier to view all notes and attachments in One form
- You can also filter your display on select the entities from the Drop down list provided as shown below

## Selection of Entity



**NotesRollup**

Starbucks logo attachment

Starbucks Attachment

[Starbucks\\_Corporation\\_Logo\\_2011.svg](#)

NotesRollup Test - Wed Feb 18 16:20:27 4:20:27 PM

**a Sample Note to Test**

Testing Attachments

[Credentials.txt](#)

NotesRollup Test - Wed Feb 18 16:18:30 4:18:30 PM

**Sample Test for notesrollup**

☒ Attachments ☐ Favorites

Regarding :A. Datum Corporation (sam

Regarding :A. Datum Corporation (sam

Regarding :Rene Valdes (sample)

**Details**

ALL

Accounts

Addresses

Cases

Connections

Contacts

Contract Lines

Contracts

Document Locations

Email Messages

Entitlements

Faxes

Invoices

Leads

Letters

Notes

Opportunities

Orders

Phone Calls

Quotes

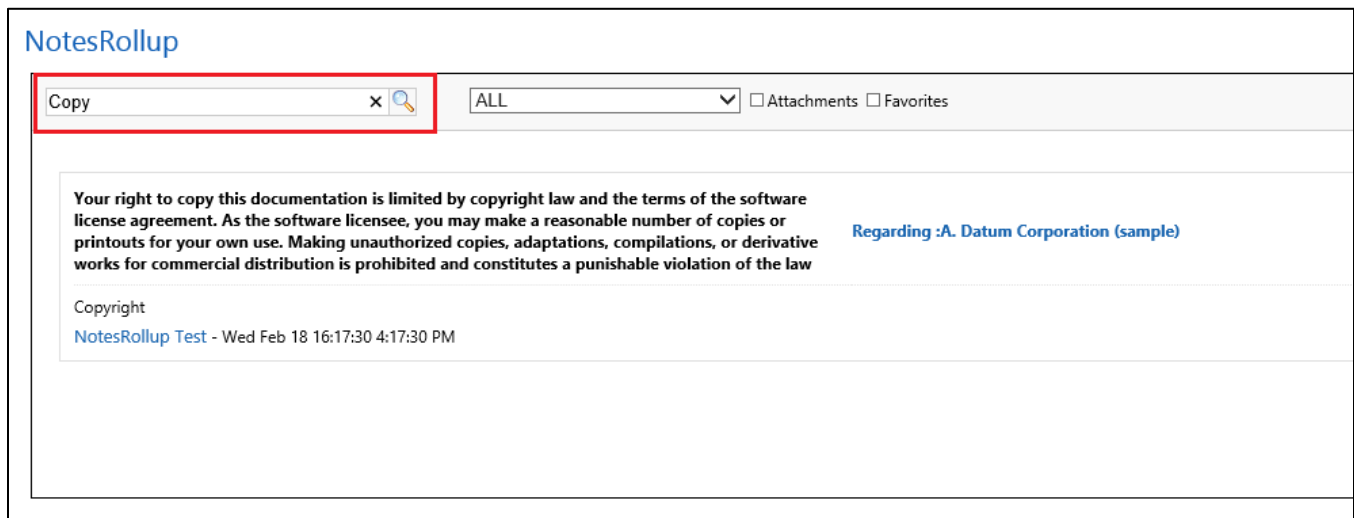
Service Activities

Tasks

Figure 18: Account form showing Selection of Entity

## Search Option

- User can search any notes by keying in (for Example we have typed in word **Copy**), All Notes which contain the word Copy are displayed for ready reference.



The screenshot shows the NotesRollup application interface. At the top left is the 'NotesRollup' logo. Below it is a search bar containing the text 'Copy', with a red rectangle highlighting it. To the right of the search bar is a dropdown menu set to 'ALL', and two checkboxes for 'Attachments' and 'Favorites'. Below the search bar, there is a copyright notice: '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'. To the right of this notice is a link: 'Regarding :A. Datum Corporation (sample)'. Below the notice, the word 'Copyright' is displayed, followed by 'NotesRollup Test - Wed Feb 18 16:17:30 4:17:30 PM'.

Figure 19: Account form showing Search facility

## Display Attachments

- You can also filter your displays for Attachment or Favorites. (shown below are the pertaining to Attachments)

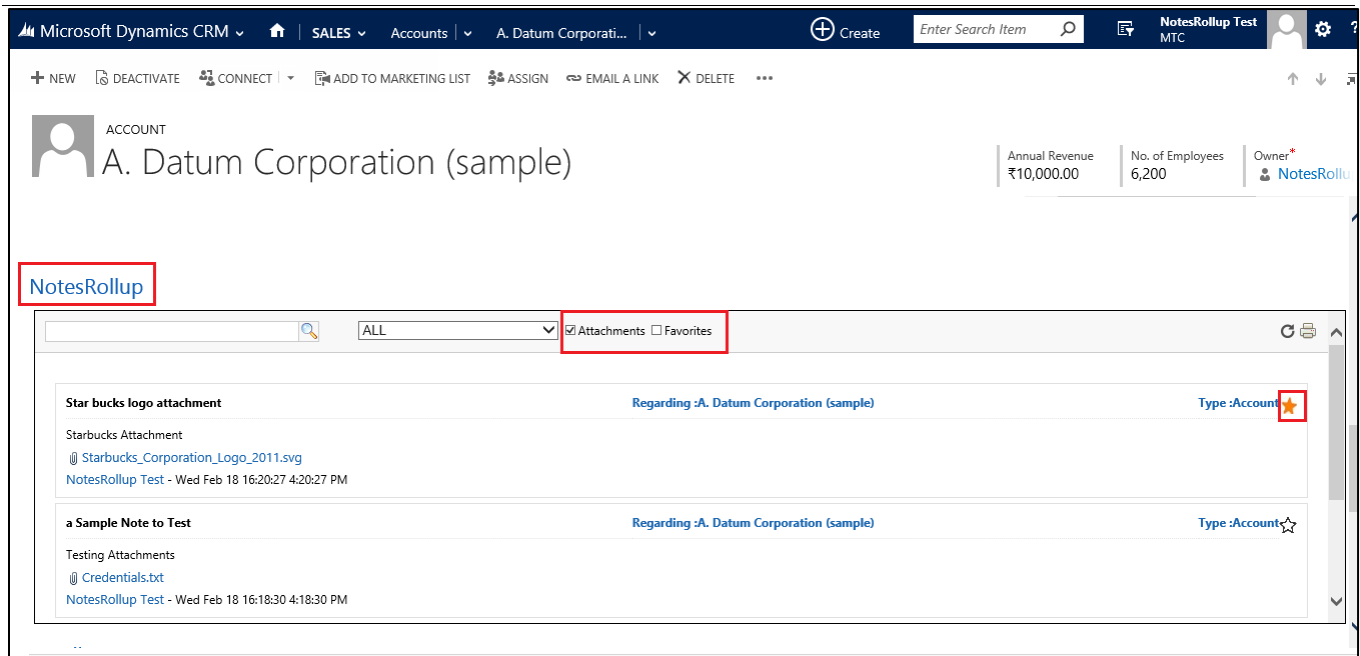



Figure 20: Account form showing Attachments

- If you select Attachment as shown above, only the files which has attachments to the Notes are displayed.

## Display Favorites

- If user clicks on  as shown below it sets the Notes as Favorite. On Double click you can undo the same
- When user selects (check box) Favorites only those which are selected as Favorites will be displayed

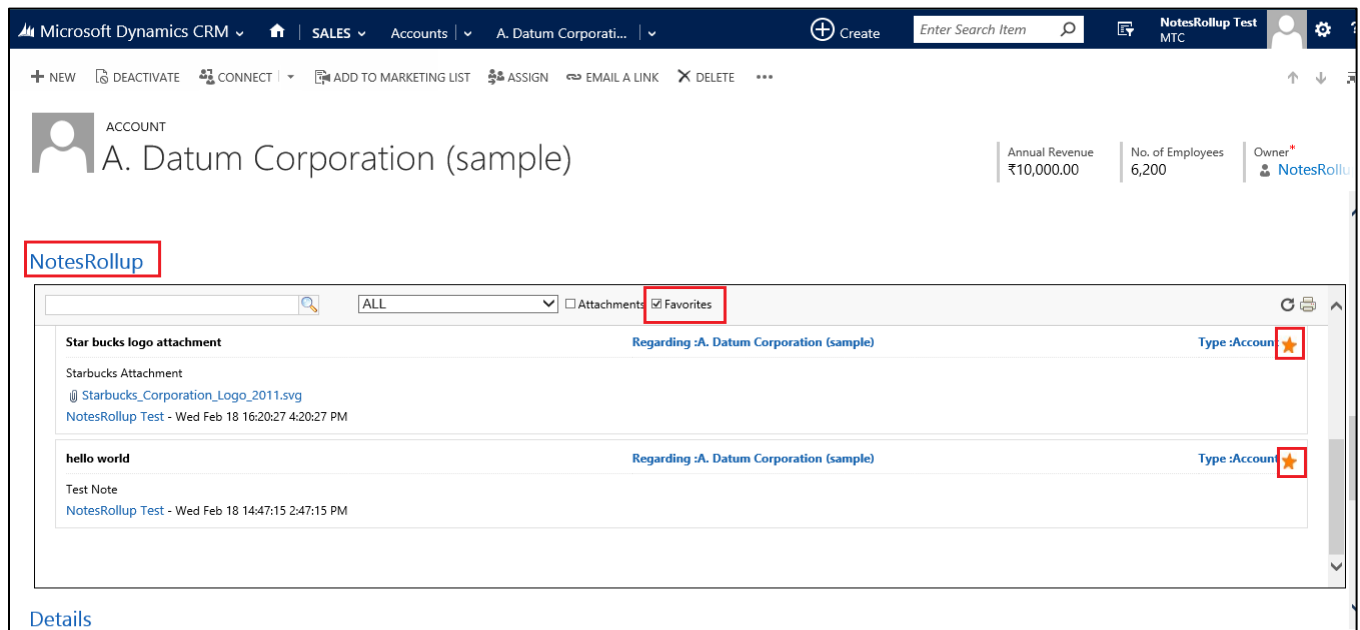
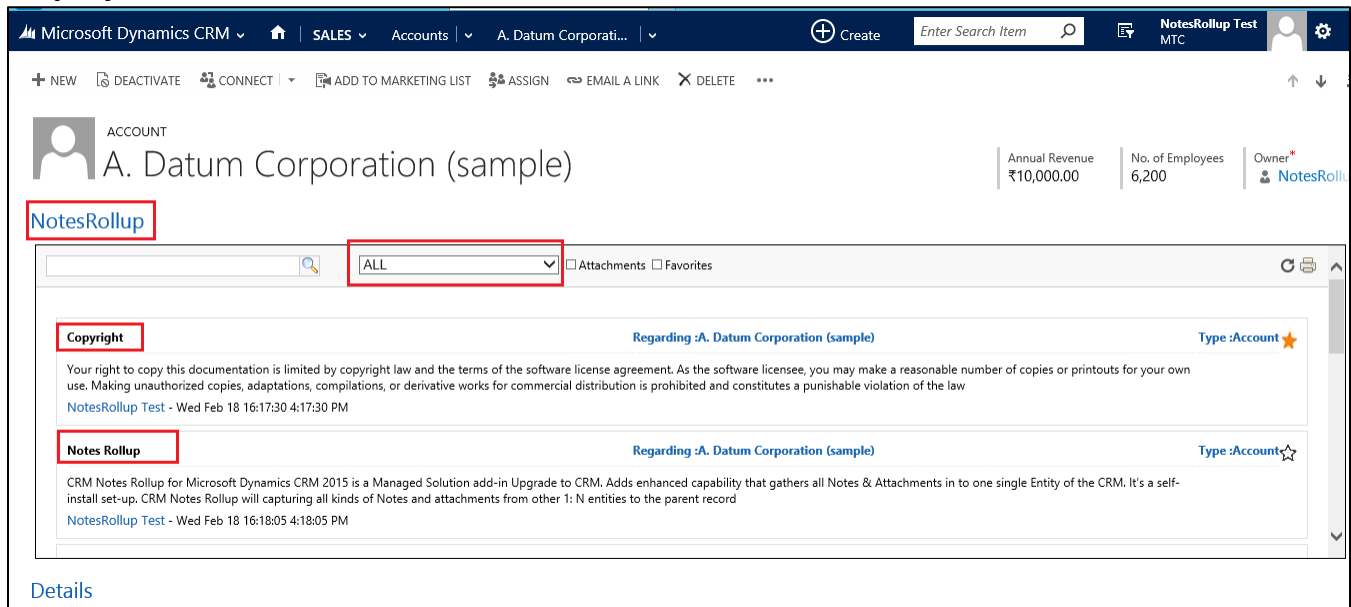


Figure 21: Account form showing Favorites

## Display Notes



Microsoft Dynamics CRM | SALES | Accounts | A. Datum Corporati... | Create | Enter Search Item | NotesRollup Test MTC

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | EMAIL A LINK | DELETE

ACCOUNT  
A. Datum Corporation (sample)

Annual Revenue: ₹10,000.00 | No. of Employees: 6,200 | Owner: NotesRollup

NotesRollup

ALL | Attachments | Favorites

**Copyright** Regarding :A. Datum Corporation (sample) Type :Account

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

NotesRollup Test - Wed Feb 18 16:17:30 4:17:30 PM

**Notes Rollup** Regarding :A. Datum Corporation (sample) Type :Account

CRM Notes Rollup for Microsoft Dynamics CRM 2015 is a Managed Solution add-in Upgrade to CRM. Adds enhanced capability that gathers all Notes & Attachments in to one single Entity of the CRM. It's a self-install set-up. CRM Notes Rollup will capturing all kinds of Notes and attachments from other 1: N entities to the parent record

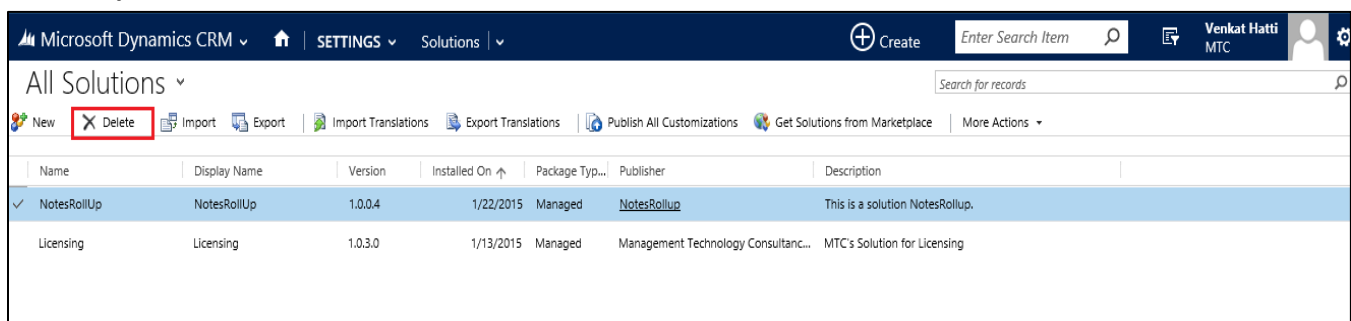
NotesRollup Test - Wed Feb 18 16:18:05 4:18:05 PM

Details

Figure 22: CRM Account form showing all Notes

## Uninstallation Process

- To uninstall Notes Rollup Solution, Navigate to **Settings** → **Solutions** → Select the check box of **Notes Rollup** then click on **Delete** as shown below



Microsoft Dynamics CRM | SETTINGS | Solutions | Create | Enter Search Item | Venkat Hatti MTC

All Solutions | Search for records

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

Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
✓ NotesRollUp	NotesRollUp	1.0.0.4	1/22/2015	Managed	NotesRollup	This is a solution NotesRollup.
Licensing	Licensing	1.0.3.0	1/13/2015	Managed	Management Technology Consultanc...	MTC's Solution for Licensing

Figure 23: Uninstallation process

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

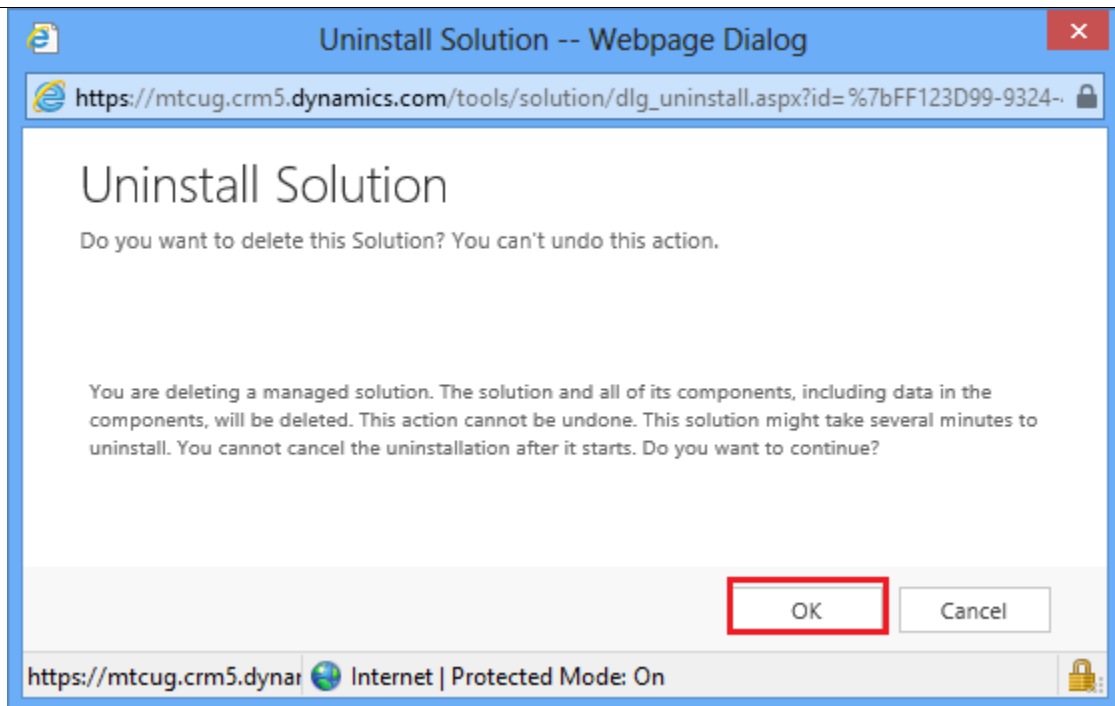


Figure 24: Uninstall Solution

- Repeat the process to uninstall 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.

Dynamics Exchange is the leading community free and open to Dynamics 365 / CRM uses 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, other 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](http://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.