

MTC Product Free Trial  
Product License Purchase  
Buy Additional Users License

# Quick Guide

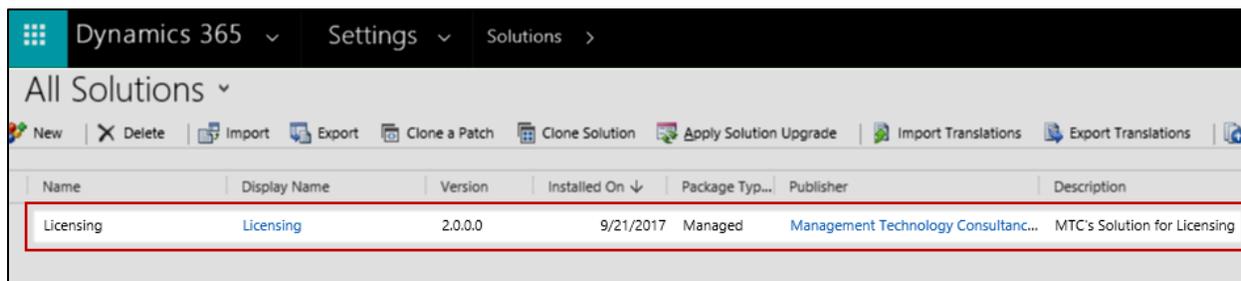


## Table of Contents

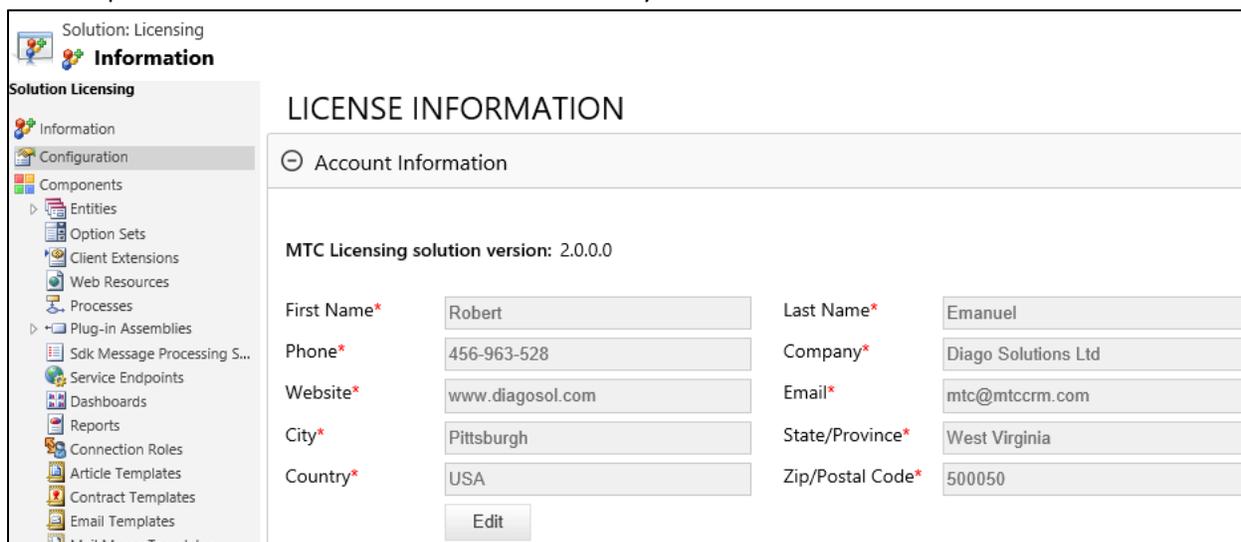
Product Free Trial Activation .....	3
Product License Purchase .....	5
Buy Additional Users License .....	12

## Product Free Trial Activation

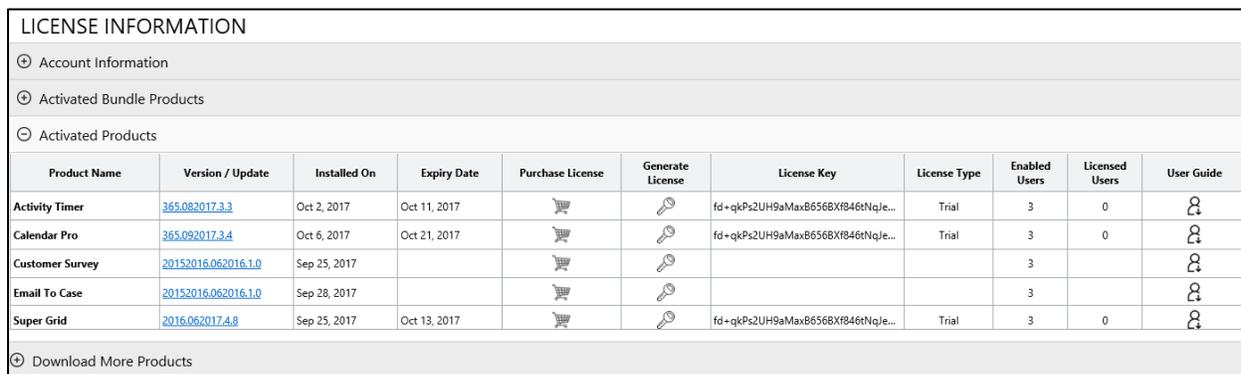
1. Go to CRM → Settings → Solutions. This CRM access and these steps require the Administrator Security Role. Click on licensing solution for the Account Registration window.



2. Complete the field details. All fields are mandatory. Click Submit.



The Account Registration window refreshes automatically and loads up with more section details such as Activated Bundle Products, Activated Products and Download More Products.



All MTC products downloaded are shown in “Activated Products” or “Activated Bundled Products.”

3. There are 2 ways to generate 15 day free trial license key for downloaded MTC products:
- Click on **Key Icon** under **Generate License of Activated Products**.

LICENSE INFORMATION										
⊕ Account Information										
⊕ Activated Bundle Products										
○ Activated Products										
Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
Activity Timer	<a href="#">365.082017.3.3</a>									
Calendar Pro	<a href="#">365.092017.3.4</a>									
Customer Survey	<a href="#">20152016.062016.1.0</a>									
Email To Case	<a href="#">20152016.062016.1.0</a>									
Super Grid	<a href="#">2016.062017.4.8</a>									

⊕ Download More Products

See a window with 3 selections. Select “**I want to start my one-time 15 day free trial**” and click “**Get Trial.**” Your 15 day free trial will be generated and updated in the **Activated Products** tab.

X

I want to start my one-time 15 day free trial

Get Trial

PS: For extension of trial period please write to [salesteam@mtccrm.com](mailto:salesteam@mtccrm.com)

I purchased the product from MTC Web Portal

I want to manually enter the license key provided by MTC Team

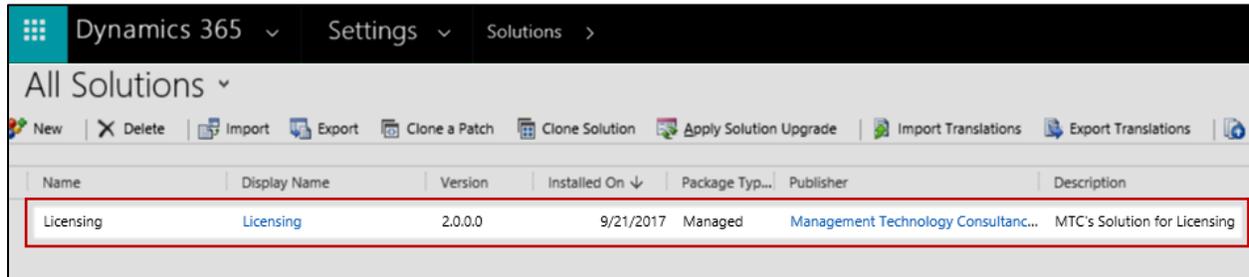
- Alternatively, the 15 day free trial license key will be generated by the first use of the product, allowing delay or an alternate User to start the trial with the appropriate Product’s Security Role. The free trial license key will be generated and updated in the **Activated Products** tab.

**Notes:**

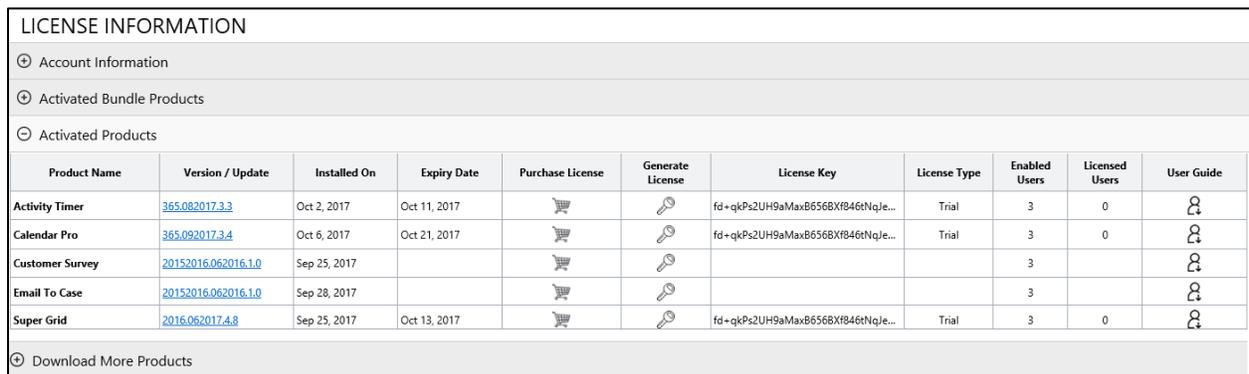
- Most MTC solutions require a unique product specific **Security Role** to be set for Users. View Security Role instructions [here](#). All products will run with the admin Security Role.
- Account Registration is a one-time activity** needed only when you install the 1<sup>st</sup> MTC product.
- For **MTC’s bundle free trial activation**, after installation click on the Key Icon on the top right corner of the bundle pane. The free trial license key is generated and activated instantly.
- Browse the “**Download More Products**” tab to view solution selection available instantly.
- If you obtain a license key from MTC for any product, click on the corresponding Key Icon under generate license and select the “**I want to manually enter the license key provided by MTC**” to enter the license key.

## Product License Purchase

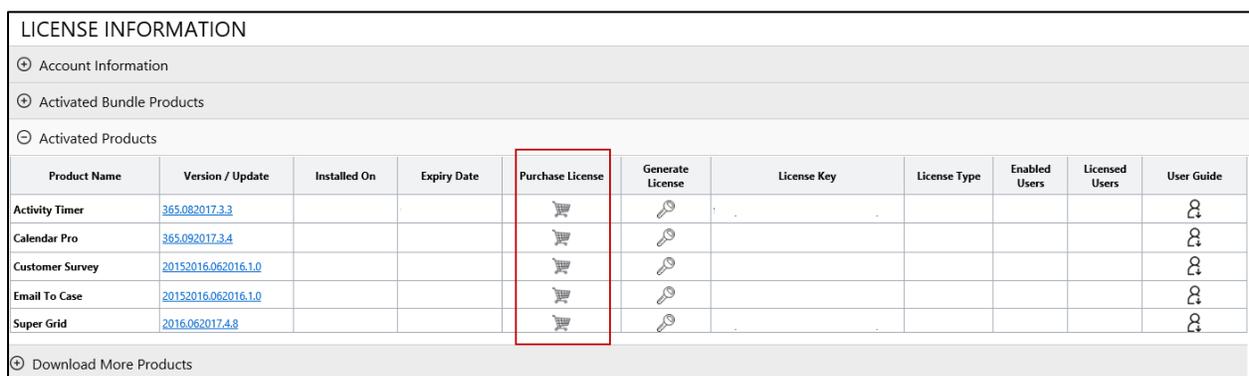
1. Go to CRM → Settings → Solutions. Click on licensing solution.



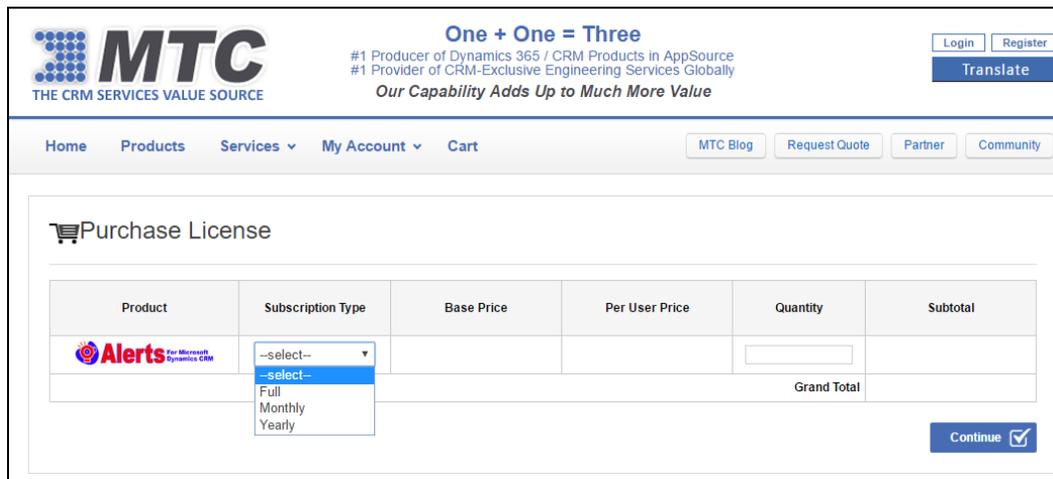
The Account Information window with Activated Products, Activated Bundle Products, and Download More Products will open.



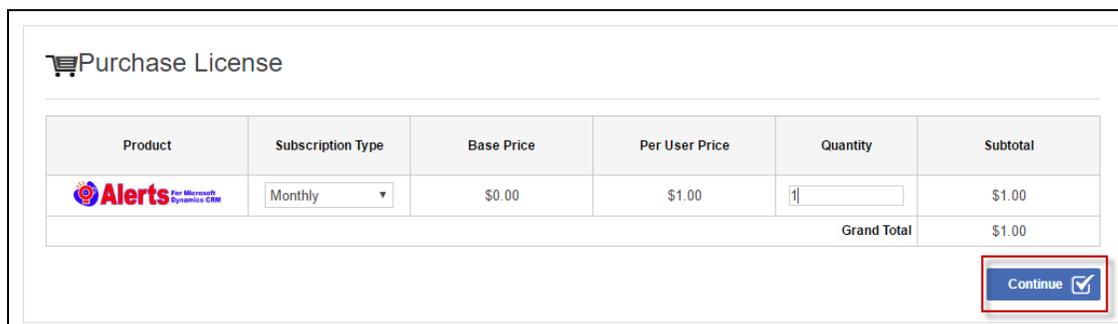
2. From the Activated Products, click on the **Cart Icon** under **Purchase License** column.



You will be directed to the MTC Purchase License portal page.



3. Select the Subscription Type for the price to show up and enter Quantity so that the Sub Total will reflect. Click **“Continue.”**



An invoice with the requesting contact will be generated.

4. Click **“Accept-Pay.”**



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**INVOICE**  
SUMMARY LINE ITEMS  
Invoice: [ID]

---

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]  
Email: [Email]  
Requesting Contact: [Name]

Currency  
US Dollar

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

MTC Primary	Primary Direct	Primary E-mail	End User	PIO Ref	Name	Issue Date	Valid Till	Terms
[Value]	[Value]	[Value]	[Value]	[Value]	[Value]	[Value]	[Value]	[Value]

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>	<b>\$1.00</b>

**Accept-Pay**



Add PIO Customer Add Text Edit Cancel Download PDF Print

For any queries contact - [Salesteam@mtccrm.com](mailto:Salesteam@mtccrm.com) or by calling 323-863-0077.  
**Thank You for Your Business!**

You will be directed to **Choose Payment Process**.

5. 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.

6. Click **“Save.”**



Payment Process

Edit Details
Pay Now

---

### Credit Card Information

FirstName: [REDACTED]      LastName: [REDACTED]  
 Credit Card Number: [REDACTED]      ExpiryDate: [REDACTED]

---

### 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**      Country: **INDIA**  
 Street: **PO Box 9999**      PostalCode: **91409**  
 City: **California**      Phone: **818-773-9999**  
 State: **CA**

---

**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>

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]

---

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

Contact: [info@mtccrm.com](mailto:info@mtccrm.com)  
Email: [info@mtccrm.com](mailto:info@mtccrm.com)  
Requesting Contact: [REDACTED]

Currency: US Dollar



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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
[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

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






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[Print](#)

For any queries contact - [SalesTeam@mtccrm.com](mailto:SalesTeam@mtccrm.com) or by calling 323-863-0077.  
**Thank You for Your Business!**

- Go back to the licensing solution page (CRM → Settings → Solutions). Click on **Key Icon** under **Generate License of Activated Products**.

LICENSE INFORMATION										
⊕ Account Information										
⊕ Activated Bundle Products										
⊖ Activated Products										
Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
Activity Timer	<a href="#">365.082017.3.3</a>									
Calendar Pro	<a href="#">365.092017.3.4</a>									
Customer Survey	<a href="#">20152016.062016.1.0</a>									
Email To Case	<a href="#">20152016.062016.1.0</a>									
Super Grid	<a href="#">2016.062017.4.8</a>									
⊕ Download More Products										

- Select **"I purchased product from MTC Web Portal"** and click **"Update."** Your product license key will be generated and updated in the Activated Products tab.

X

I want to start my one-time 15 day free trial

I purchased the product from MTC Web Portal

Update

I want to manually enter the license key provided by MTC Team

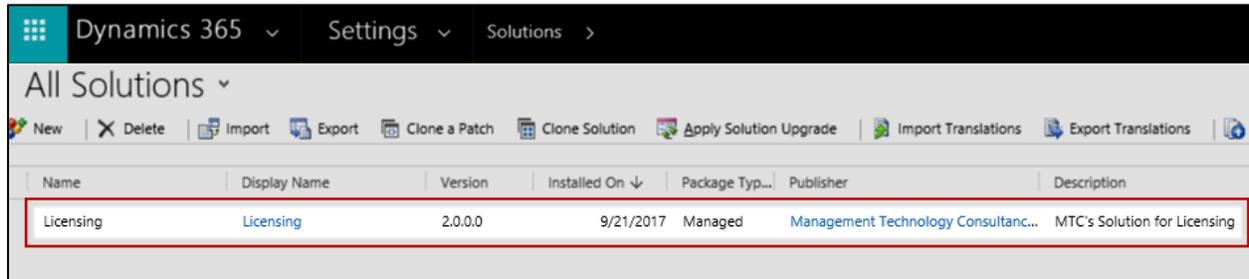
**Note: For MTC Bundle Products, you have to use Cart Icon that is present on the top right corner of that particular bundle for purchasing the license.**

To view MTC's Product Specific Security Role Matrix, [click here](#).

In case of any queries or complaints, please write down to [salesteam@mtccrm.com](mailto:salesteam@mtccrm.com)

## Buy Additional Users License

1. Go to CRM → Settings → Solutions. Click on licensing solution.



The Account Information window with Activated Products, Activated Bundle Products, and Download More Products will open.

Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
Activity Timer	<a href="#">365.082017.3.3</a>	Oct 2, 2017	Oct 11, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...	Trial	3	0	
Calendar Pro	<a href="#">365.092017.3.4</a>	Oct 6, 2017	Oct 21, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...	Trial	3	0	
Customer Survey	<a href="#">20152016.062016.1.0</a>	Sep 25, 2017						3		
Email To Case	<a href="#">20152016.062016.1.0</a>	Sep 28, 2017						3		
Super Grid	<a href="#">2016.062017.4.8</a>	Sep 25, 2017	Oct 13, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...	Trial	3	0	

2. From the Activated Products, click on the **Cart Plus Icon** under **Purchase License** column. (See example below)

Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key
Activity Timer	<a href="#">365.082017.3.3</a>	Oct 2, 2017	Oct 11, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...
Calendar Pro	<a href="#">365.092017.3.4</a>	Oct 6, 2017	Oct 21, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...
Customer Survey	<a href="#">20152016.062016.1.0</a>	Sep 25, 2017				
Email To Case	<a href="#">20152016.062016.1.0</a>	Sep 28, 2017				
Expense Manager	<a href="#">365.092017.3.22</a>	Sep 28, 2017	Dec 31, 2099			CCC@IDE@EDJD
Revenue ForeCast Manager	<a href="#">365.102017.3.1</a>	Oct 3, 2017	Oct 18, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...
Group Calendar	<a href="#">365.062017.14.8</a>	Oct 3, 2017	Oct 18, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...

3. You will be directed to the MTC Purchase License portal page.

 Buy More License

Product	Subscription Type	Base Price	Per User Price	Quantity	Subtotal
 Alerts	Monthly	\$0.00	\$1.00	1	\$1.00
<b>Grand Total</b>					<b>\$1.00</b>

Notice the Subscription Type is carried forward from your previous selection and is disabled. Only the Quantity field is open for editing.

4. Enter Quantity and click “Continue.” An invoice with the requesting contact will be generated.
5. Click “Accept-Pay.”



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**INVOICE**  
SUMMARY LINE ITEMS  
Invoice # [REDACTED]

---

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

Currency  
US Dollar

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Community www.DynamicsExchange.com

Contact: [REDACTED]  
Email: [REDACTED]  
**Requesting Contact**  
[REDACTED]

MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Till	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
			<b>Total</b>	<b>\$1.00</b>






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

6. 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 **“Save.”**

## Payment Process

CRM Organization Name:  Apply Coupon: 

## Choose Payment Process

 Enter a New Card

## Enter Card Details

Credit Card Type	<input type="text" value="Mastercard"/>	Card Expiration Date(MM-YYYY)	<input type="text" value="MM"/> <input type="text" value="YYYY"/>
Credit Card Number	<input type="text"/>	First Name	<input type="text" value="Rakesh"/>
		Last Name	<input type="text" value="Agarwal"/>

## Credit Card Billing Address Details

Company Name	<input type="text"/>	Country	<input type="text" value="INDIA"/>
Street	<input type="text" value="PO Box 9999"/>	Postal Code	<input type="text" value="91409"/>
City	<input type="text" value="California"/>	Phone	<input type="text" value="818-773-9999"/>
State	<input type="text" value="CA"/>		

- Confirm the details entered. Click **“Continue.”**

### 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

9. Confirm the Credit Card information and Invoice amount. Click “Pay Now.”

### 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**

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#### Credit card Billing Address

Company Name: **MCC**  
 Street: **PO Box 9999**    Country: **INDIA**  
 City: **California**    PostalCode: **91409**  
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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 Till	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
July-05-17 [REDACTED] Paid by Credit card ending ...5016 – Thank You!				Total \$1.00






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Calendar Pro	<a href="#">365.092017.3.4</a>									
Customer Survey	<a href="#">20152016.062016.1.0</a>									
Email To Case	<a href="#">20152016.062016.1.0</a>									
Super Grid	<a href="#">2016.062017.4.8</a>									

⊕ Download More Products

11. Select **“I purchased product from MTC Web Portal”** and click **“Update.”** Your product license key will be generated and updated in the Activated Products tab.

X

I want to start my one-time 15 day free trial

I purchased the product from MTC Web Portal

Update

I want to manually enter the license key provided by MTC Team

**Note: For MTC Bundle Products, you have to use Cart Plus Icon that is present on the top right corner of that particular bundle for purchasing the license.**

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