MTC Product Free Trial
Product License Purchase
Buy Additional Users License

Quick Guide

THE CRM SERVICES VALUE SOURCE

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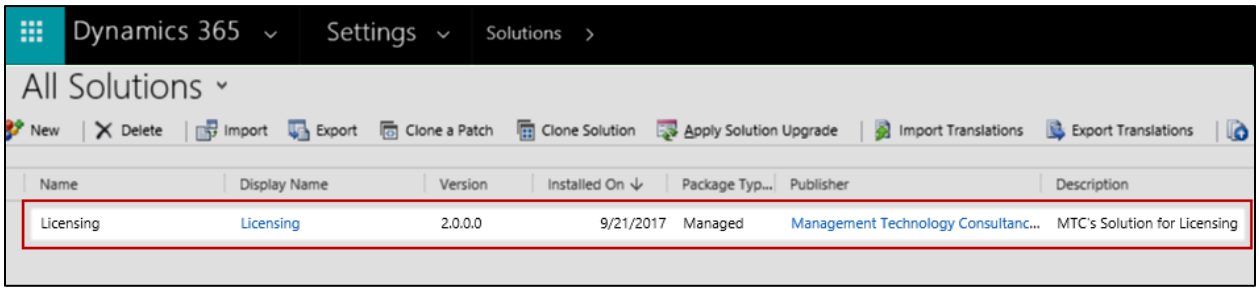
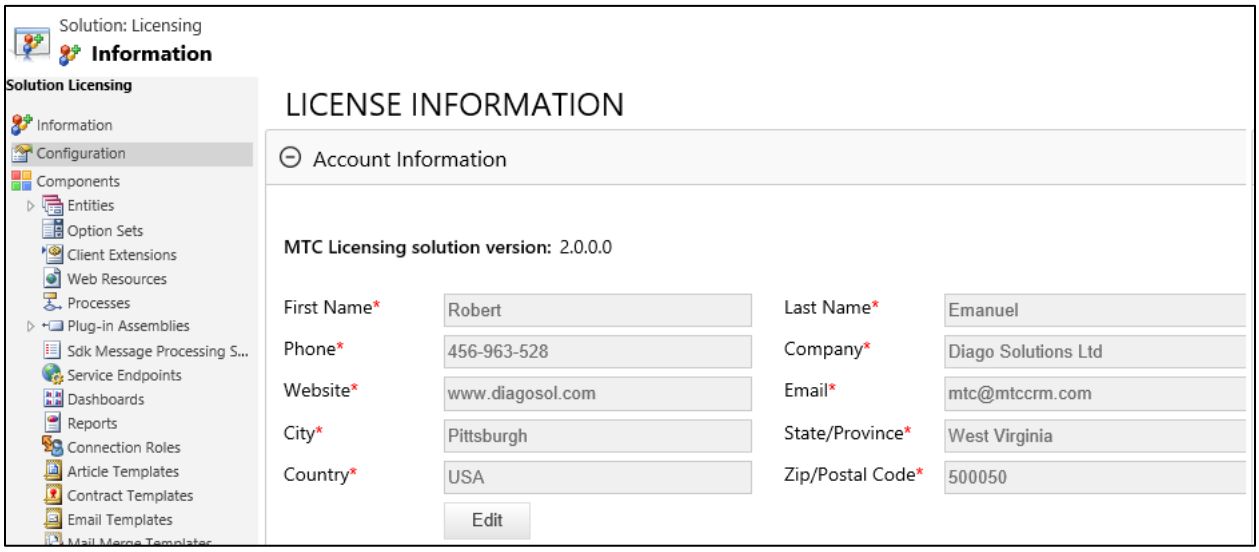
Product Free Trial Activation

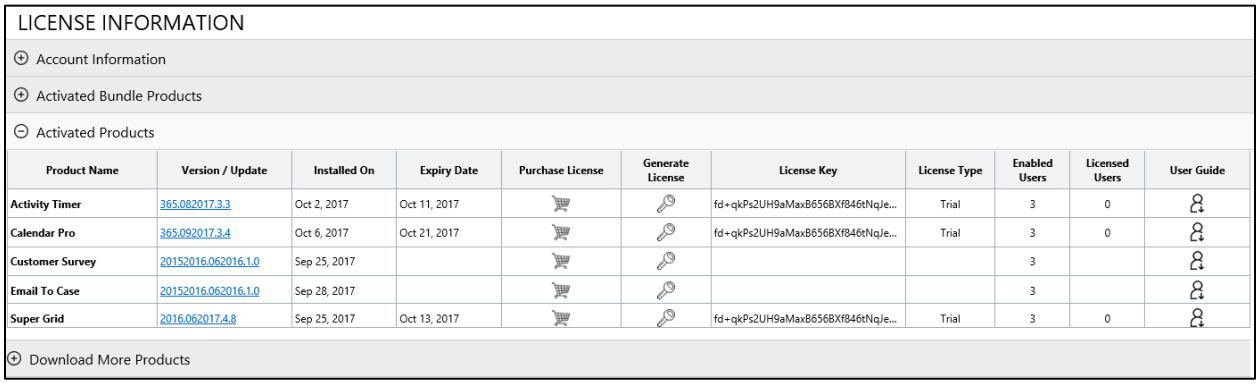
1. Go to CRM → Settings → Solutions. This CRM access and these steps require the Administrator Security Role. Click on licensing solution for the Account Registration window.



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 such as Activated Bundle Products, Activated Products and Download More Products.



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

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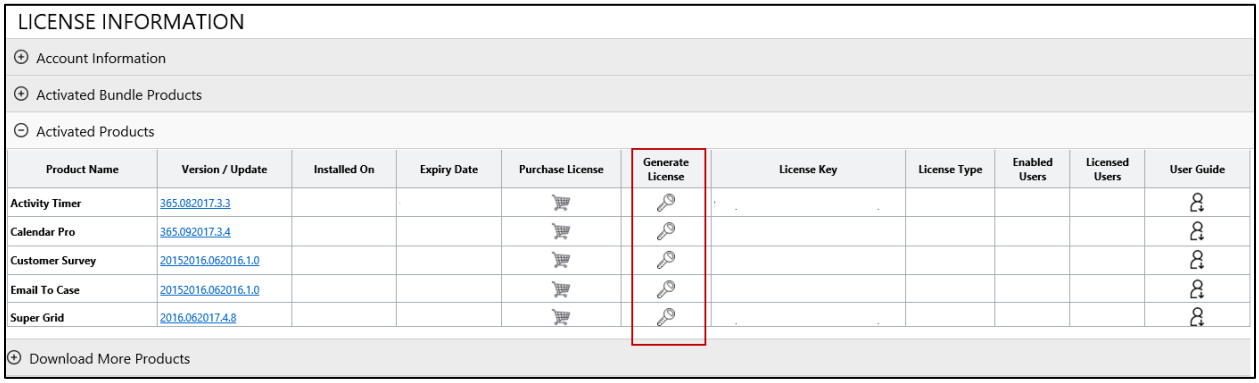
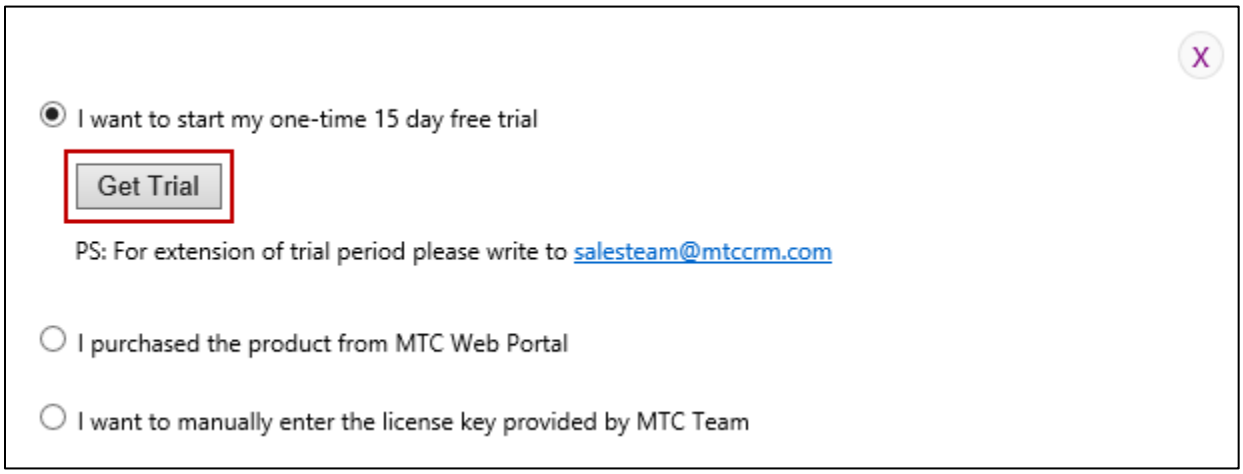
3. **There are 2 ways to generate 15 day free trial license key for downloaded MTC products:**
    a. Click on **Key Icon under Generate License of Activated Products**.



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.



    b. 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 1st 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.*

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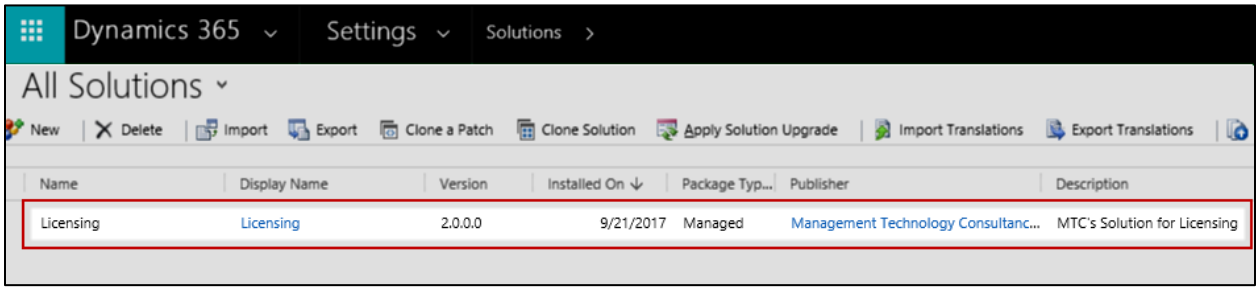
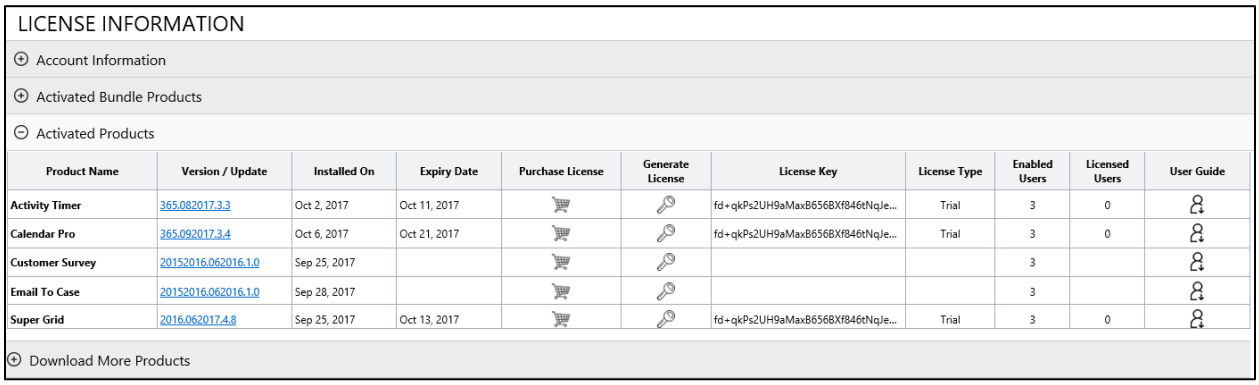
Product License Purchase

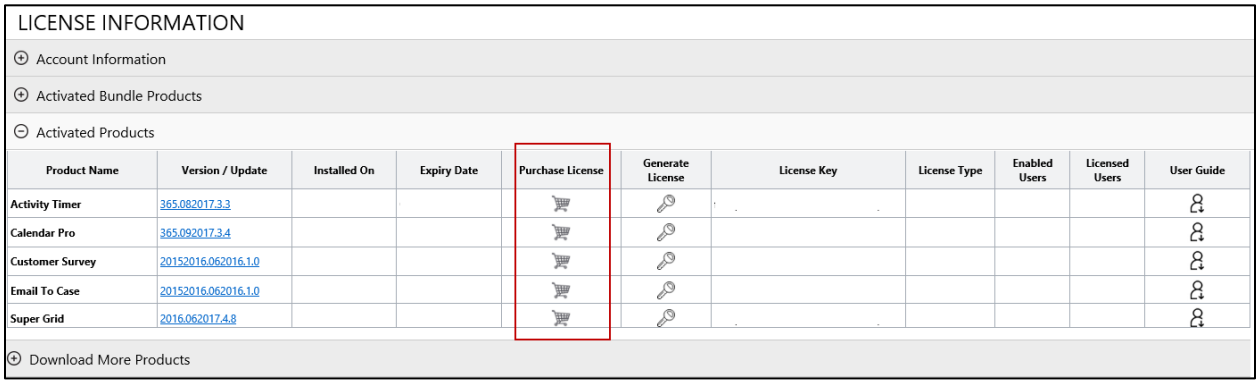
1. Go to CRM → Settings → Solutions. Click on licensing solution.



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.

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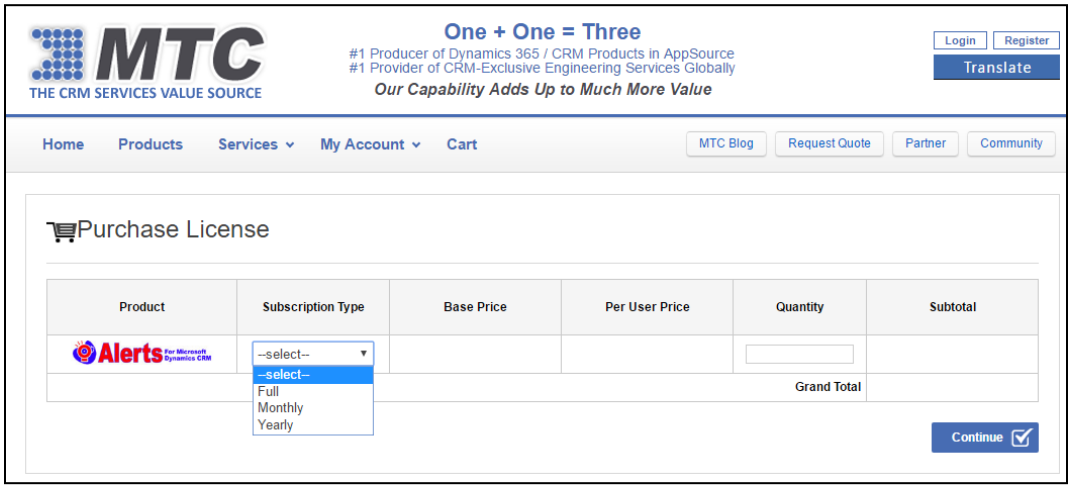
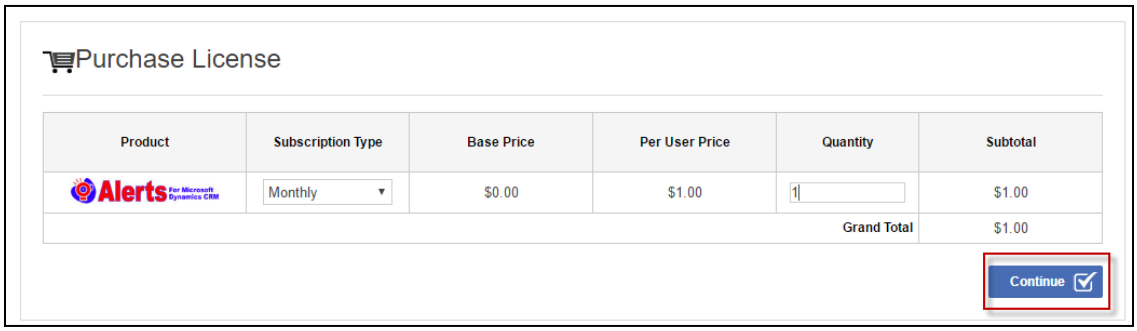


3. Select the Subscription Type for the price to show up and enter Quantity so that the Sub Total will reflect. Click "Continue."



An invoice with the requesting contact will be generated.

4. Click "Accept-Pay."

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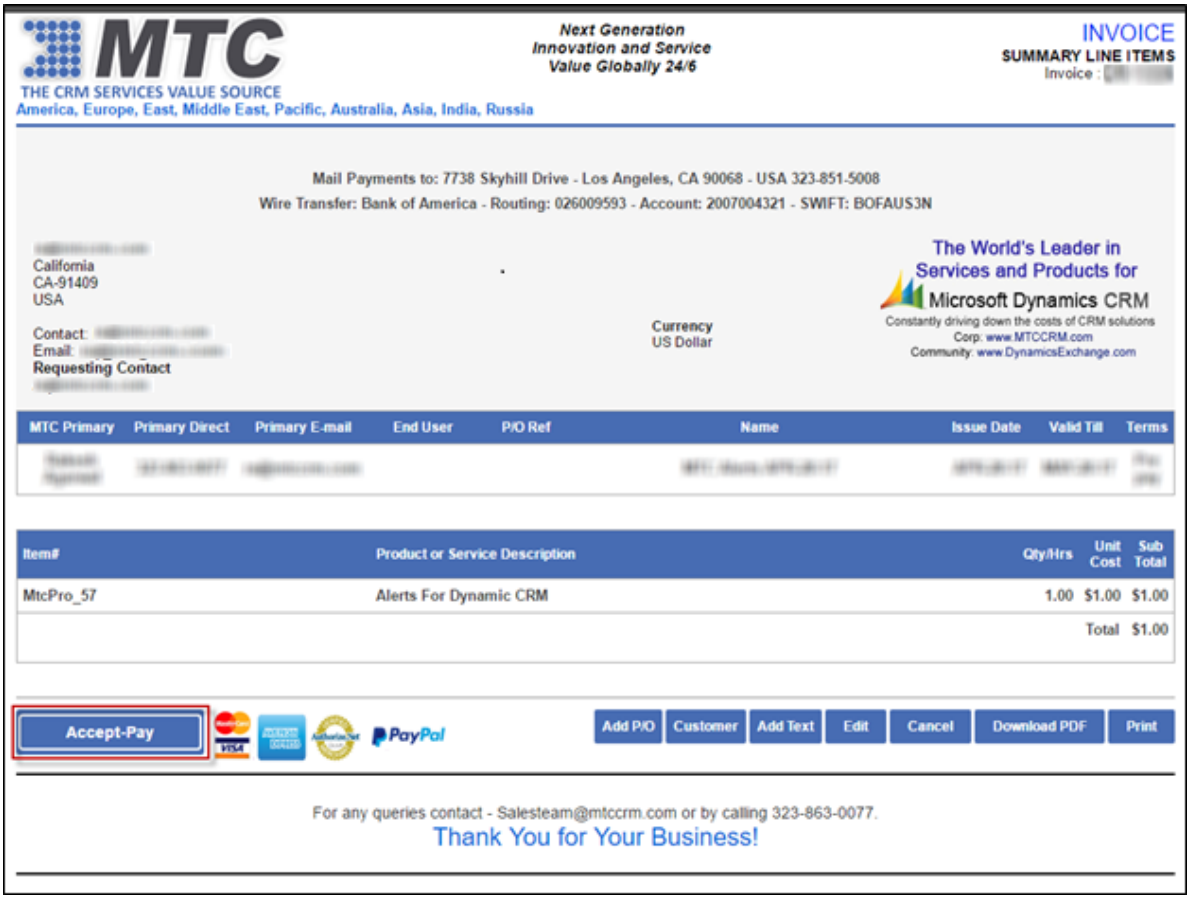

You will be directed to Choose Payment Process.

5. Make your selection by clicking on the options listed.

You will be directed to the Payment Process page where you need to enter the credit card details.

6. Click "Save."

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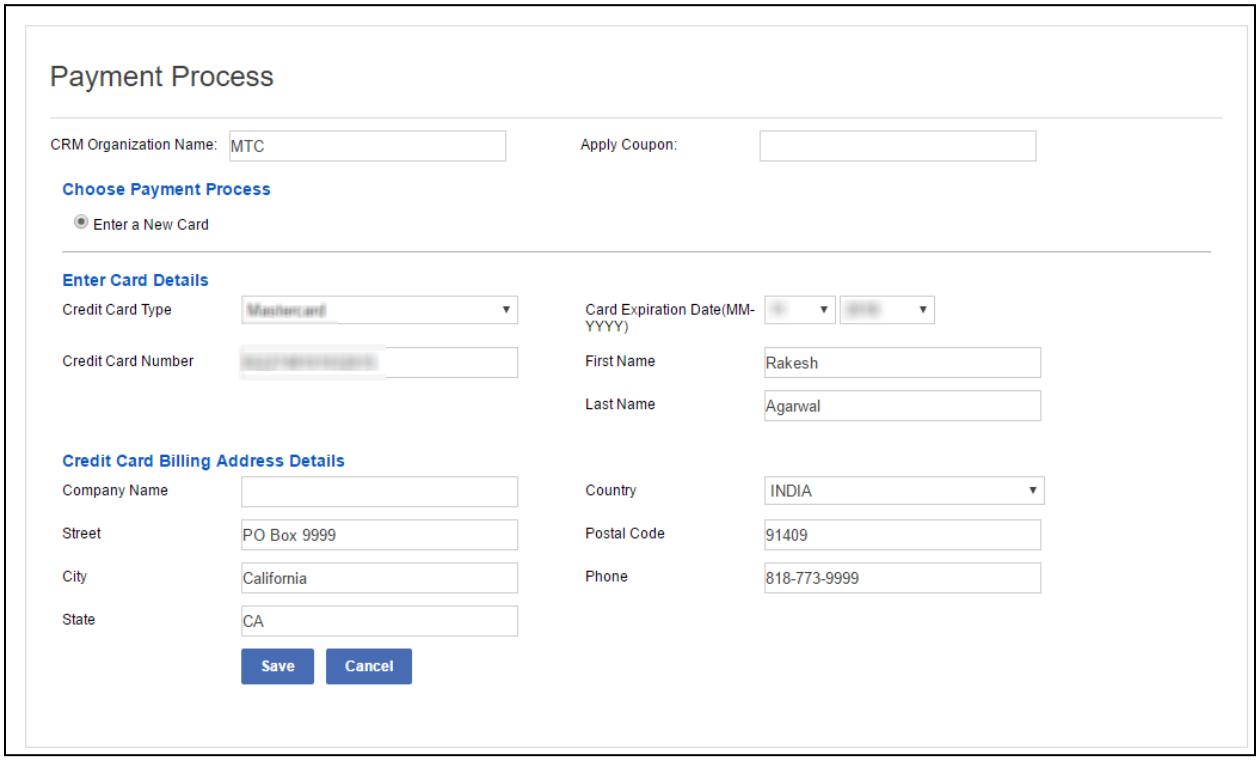
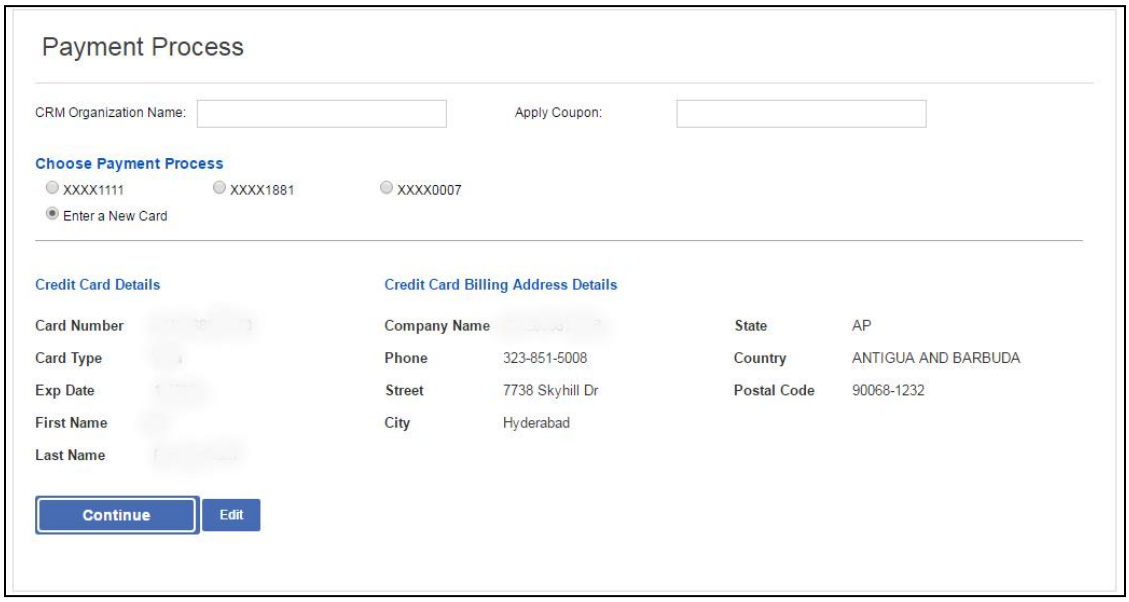


7. Confirm the details entered. Click "**Continue.**"



8. Confirm the Credit Card information and Invoice amount. Click "**Pay Now.**"

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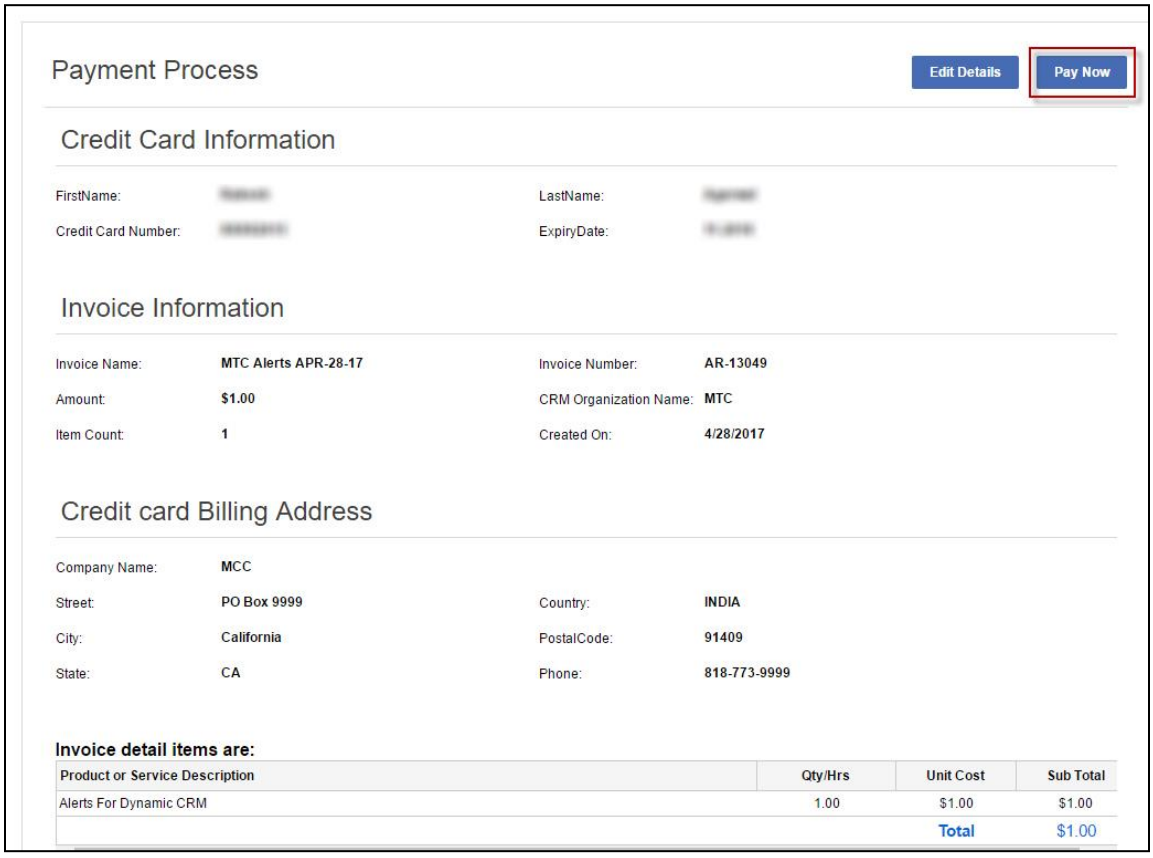

A paid invoice copy will be displayed on the screen which can downloaded in PDF format or can be printed. Simultaneously, an email with this paid invoice copy will be sent to you.

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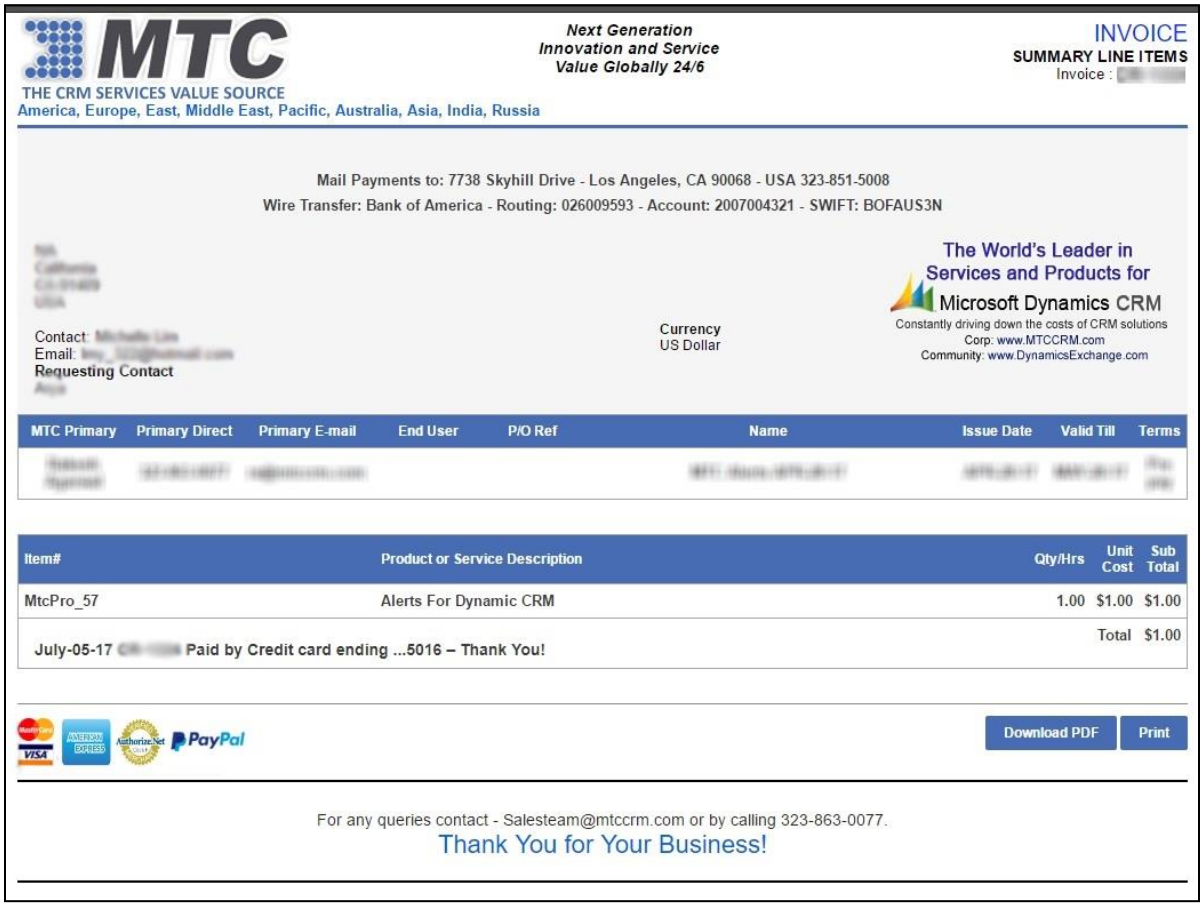

MTC
THE CRM SERVICES VALUE SOURCE
America, Europe, East, Middle East, Pacific, Australia, Asia, India, Russia

Next Generation
Innovation and Service
Value Globally 24/6

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

[redacted]

Contact: [redacted]
Email: [redacted]
Requesting Contact

Currency
US Dollar

The World's Leader in Services and Products for Microsoft Dynamics CRM
Constantly driving down the costs of CRM solutions
Corp: www.MTCCRM.com
Community: www.DynamicsExchange.com

MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Till	Terms
[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 [redacted] Paid by Credit card ending ...5016 – Thank You!

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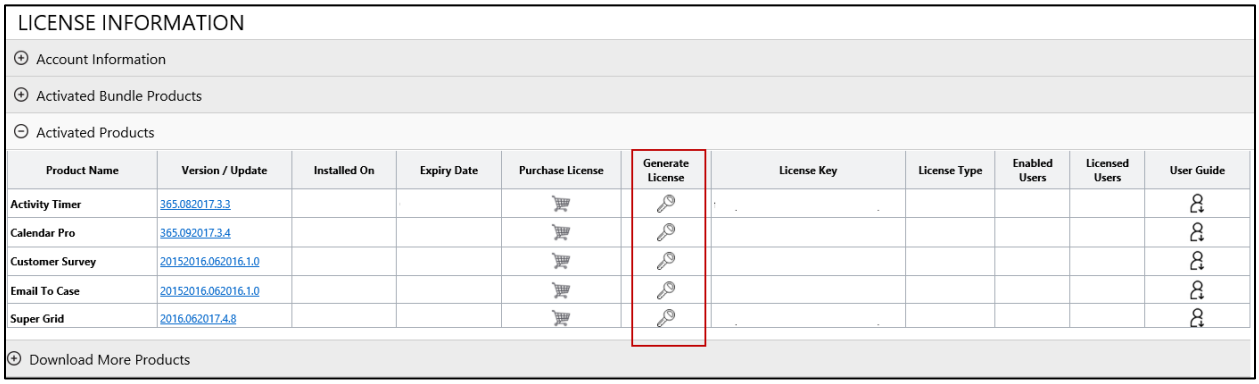
For any queries contact - Salesteam@mtccrm.com or by calling 323-863-0077.
Thank You for Your Business!

9. 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	365.082017.3.3									
Calendar Pro	365.092017.3.4									
Customer Survey	20152016.062016.1.0									
Email To Case	20152016.062016.1.0									
Super Grid	2016.062017.4.8									

⊕ Download More Products

10. 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.

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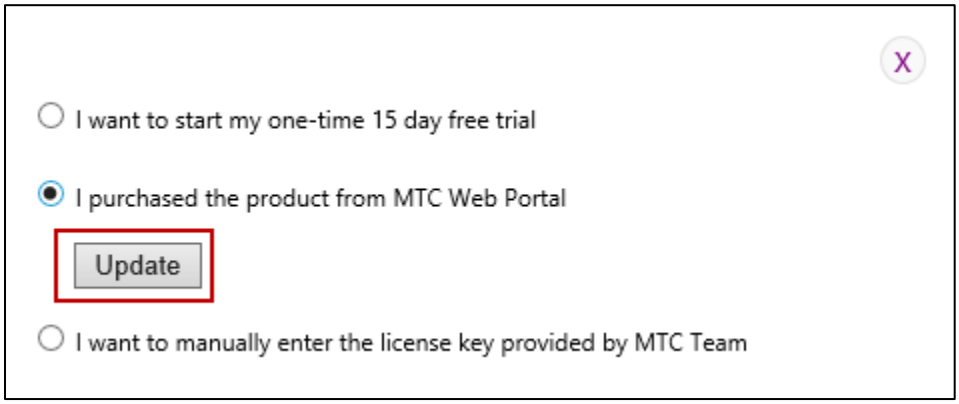

Note: For MTC Bundle Products, you have to use Cart Icon that is present on the top right corner of that particular bundle for purchasing the license.

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

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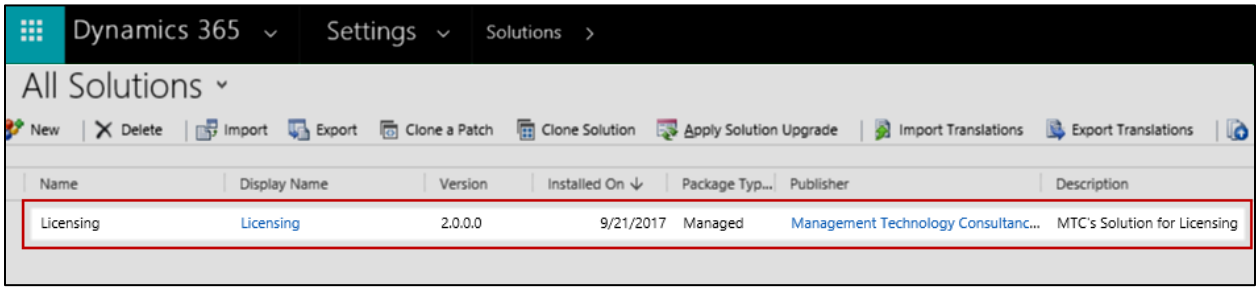
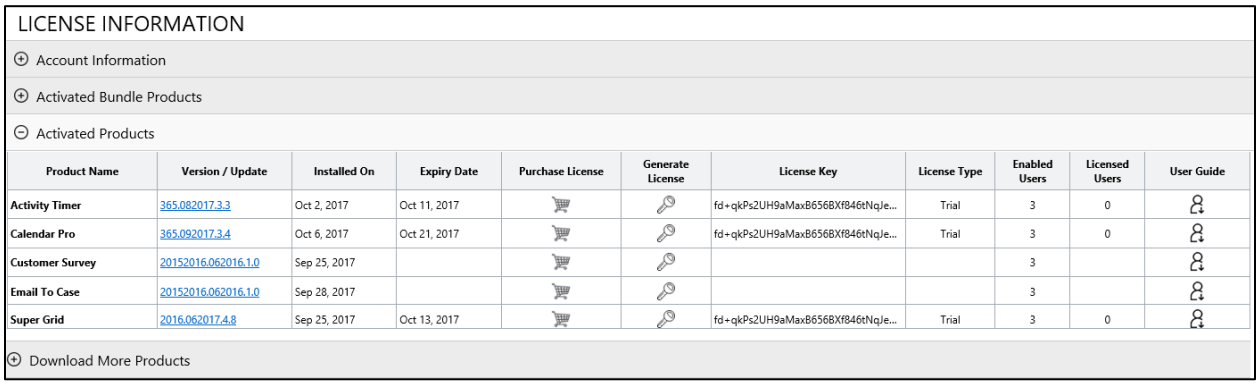
Buy Additional Users License

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

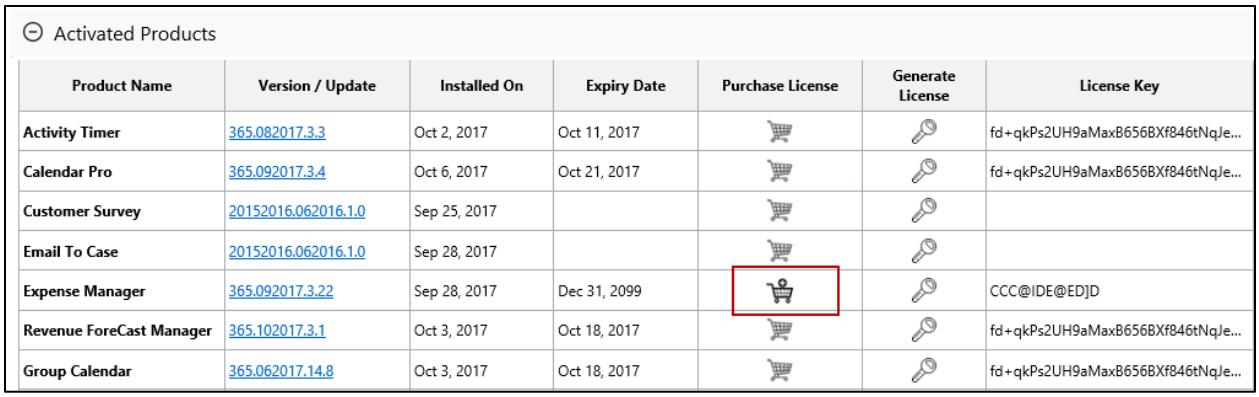


The Account Information window with Activated Products, Activated Bundle Products, and Download More Products will open.



Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
Activity Timer	365.082017.3.3	Oct 2, 2017	Oct 11, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...	Trial	3	0	
Calendar Pro	365.092017.3.4	Oct 6, 2017	Oct 21, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...	Trial	3	0	
Customer Survey	20152016.062016.1.0	Sep 25, 2017						3		
Email To Case	20152016.062016.1.0	Sep 28, 2017						3		
Super Grid	2016.062017.4.8	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	365.082017.3.3	Oct 2, 2017	Oct 11, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...
Calendar Pro	365.092017.3.4	Oct 6, 2017	Oct 21, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...
Customer Survey	20152016.062016.1.0	Sep 25, 2017				
Email To Case	20152016.062016.1.0	Sep 28, 2017				
Expense Manager	365.092017.3.22	Sep 28, 2017	Dec 31, 2099			CCC@IDE@ED]D
Revenue ForeCast Manager	365.102017.3.1	Oct 3, 2017	Oct 18, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...
Group Calendar	365.062017.14.8	Oct 3, 2017	Oct 18, 2017			fd+qkPs2UH9aMaxB656BXf846tNqJe...

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

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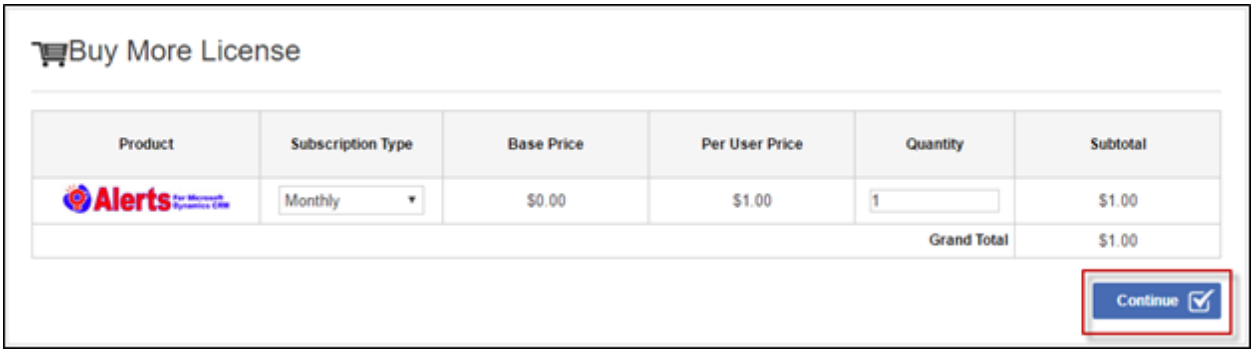
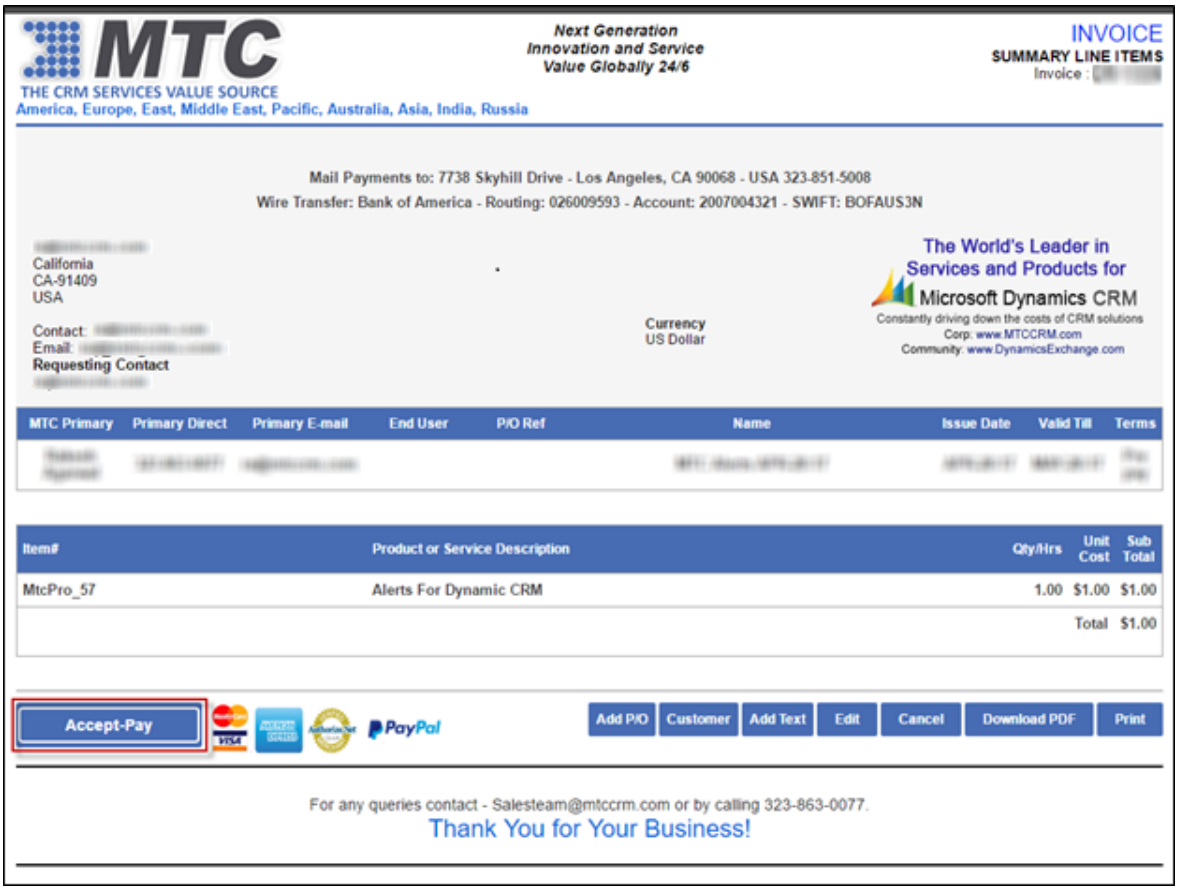


Notice the Subscription Type is carried forward from your previous selection and is disabled. Only the Quantity field is open for editing.

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



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

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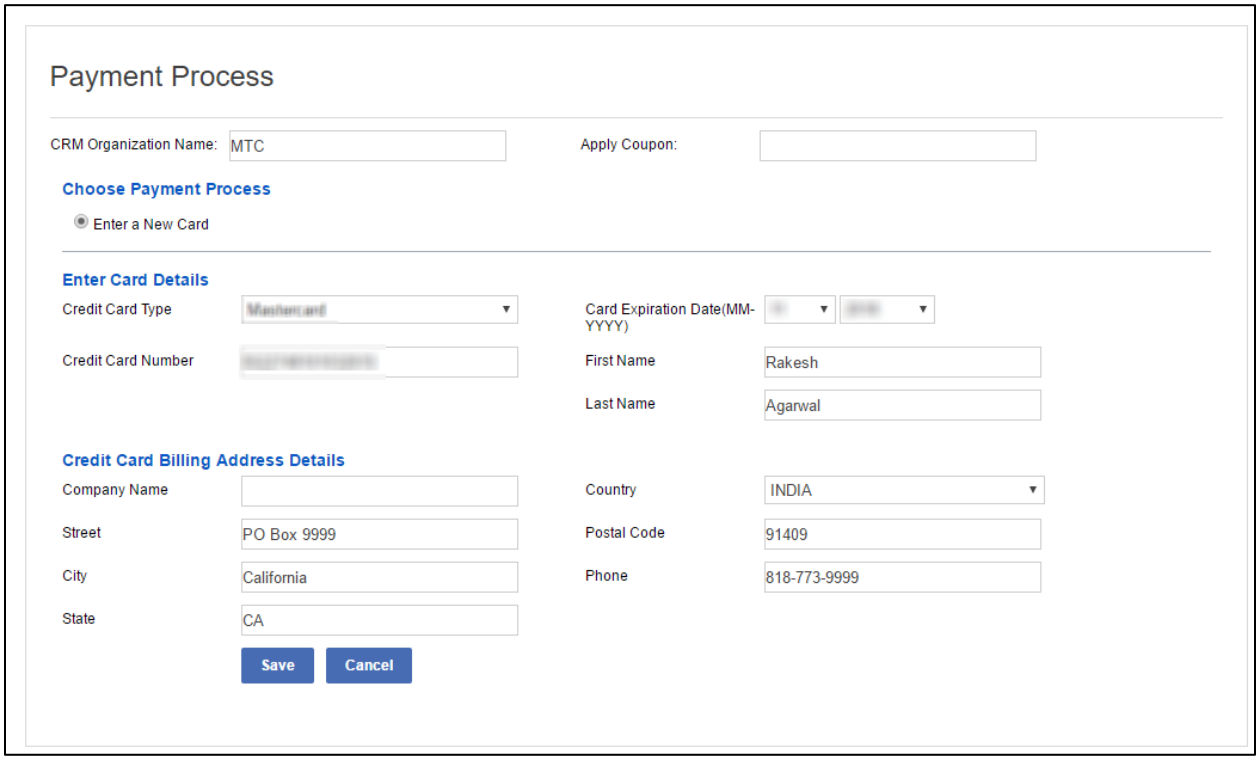
7. You will be directed to the Payment Process page where you need to enter the credit card details. (Or choose the already existing saved card if any). Click "Save."



8. Confirm the details entered. Click "Continue."

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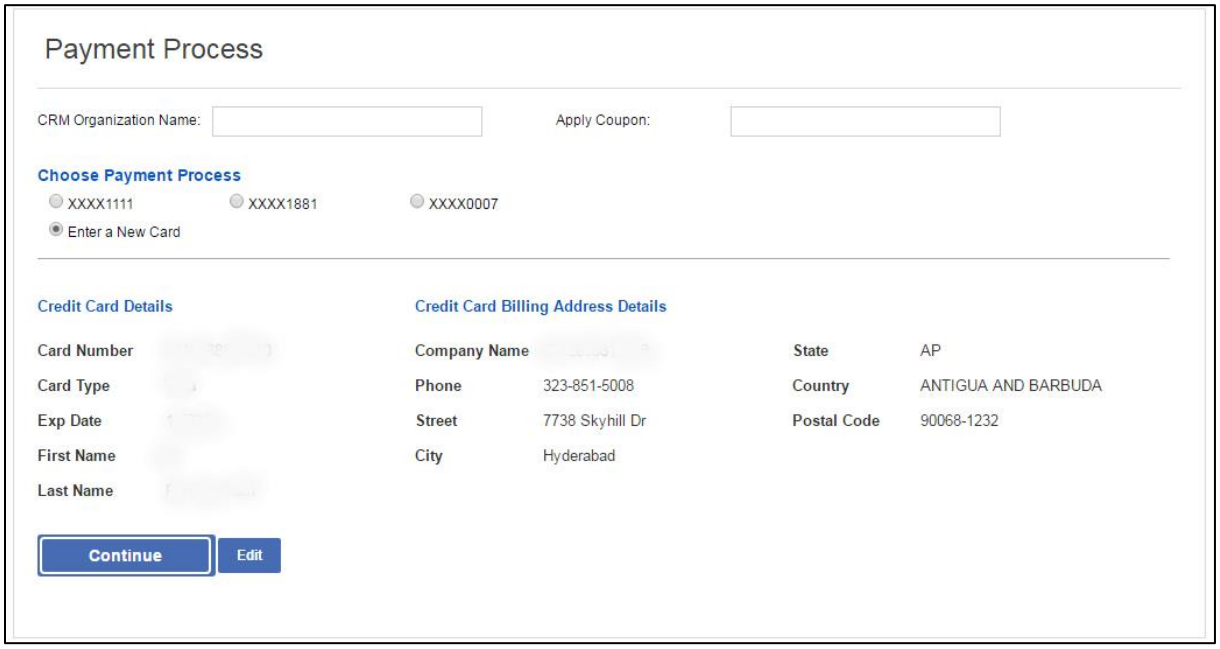
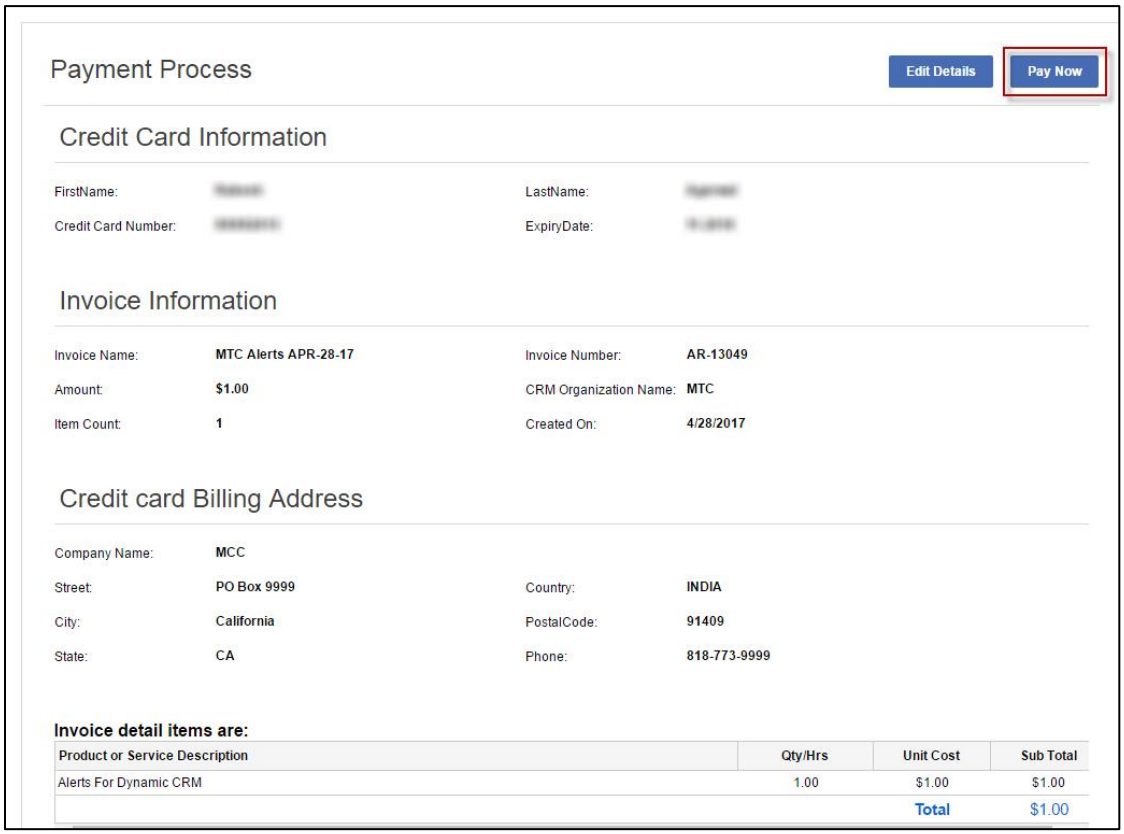


9. Confirm the Credit Card information and Invoice amount. Click "**Pay Now.**"



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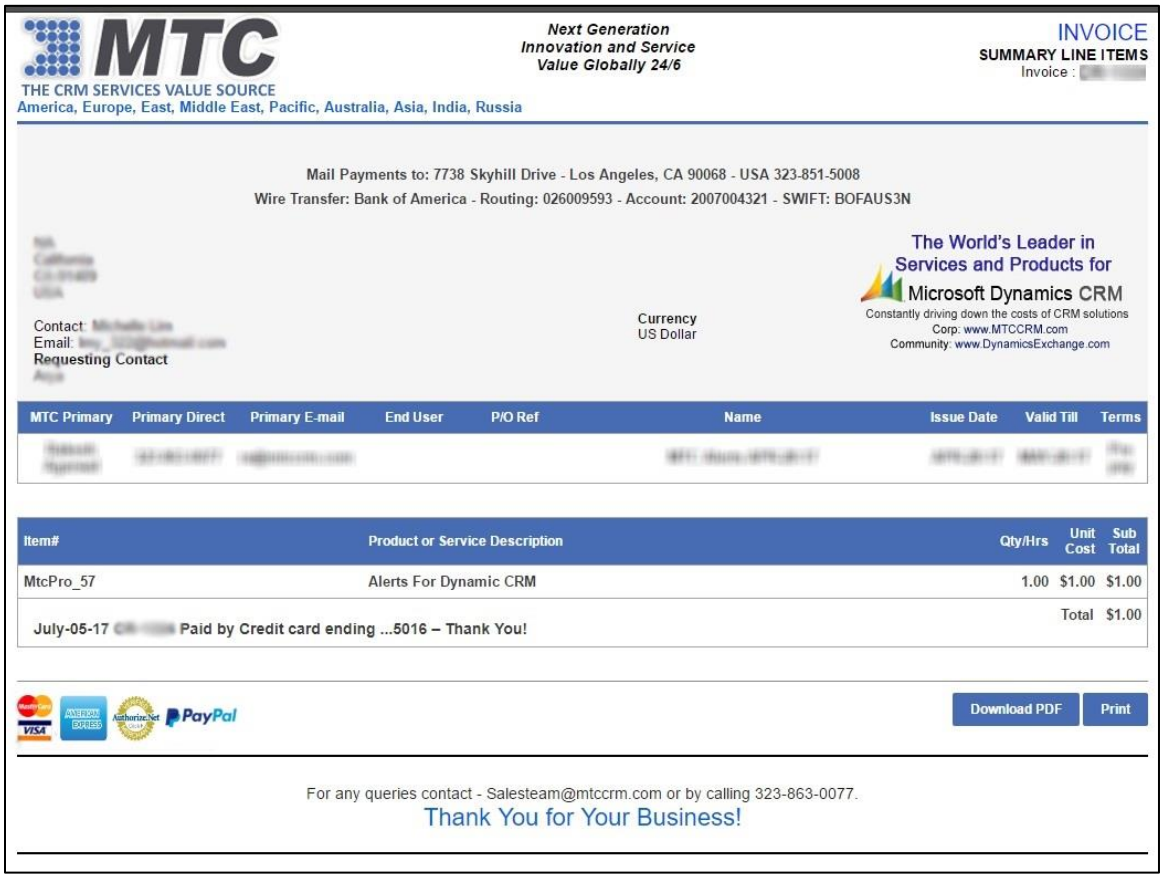
A paid invoice copy will be displayed on the screen which can downloaded in PDF format or can be printed. Simultaneously, an email with this paid invoice copy will be sent to you.



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THE CRM SERVICES VALUE SOURCE
America, Europe, East, Middle East, Pacific, Australia, Asia, India, Russia

Next Generation
Innovation and Service
Value Globally 24/6

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

[redacted]
USA

Contact: [redacted]
Email: [redacted]
Requesting Contact
[redacted]

Currency
US Dollar

The World's Leader in Services and Products for Microsoft Dynamics CRM
Constantly driving down the costs of CRM solutions
Corp: www.MTCCRM.com
Community: www.DynamicsExchange.com

MTC Primary	Primary Direct	Primary E-mail	End User	P/O Ref	Name	Issue Date	Valid Till	Terms
[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 [redacted] Paid by Credit card ending ...5016 – Thank You!

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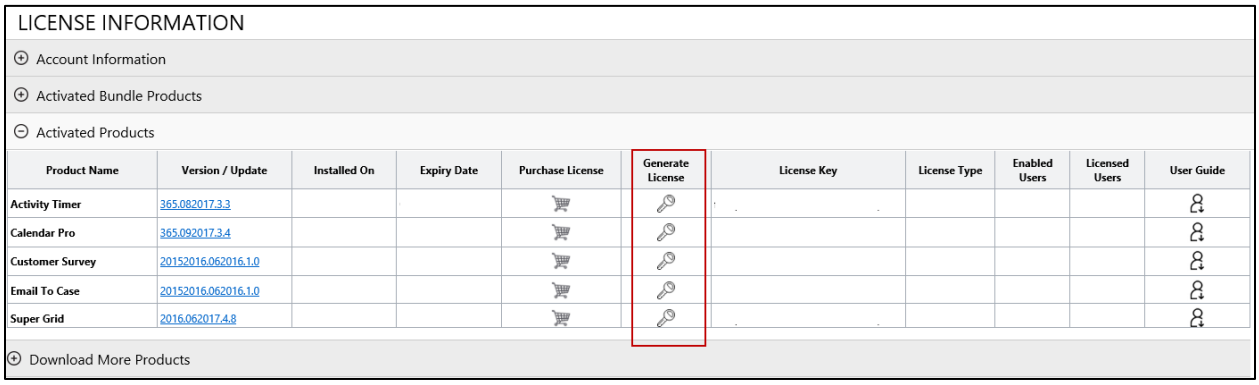
For any queries contact - Salesteam@mtccrm.com or by calling 323-863-0077.
Thank You for Your Business!

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



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⊕ Activated Bundle Products

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Product Name	Version / Update	Installed On	Expiry Date	Purchase License	Generate License	License Key	License Type	Enabled Users	Licensed Users	User Guide
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Calendar Pro	365.092017.3.4									
Customer Survey	20152016.062016.1.0									
Email To Case	20152016.062016.1.0									
Super Grid	2016.062017.4.8									

⊕ 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.

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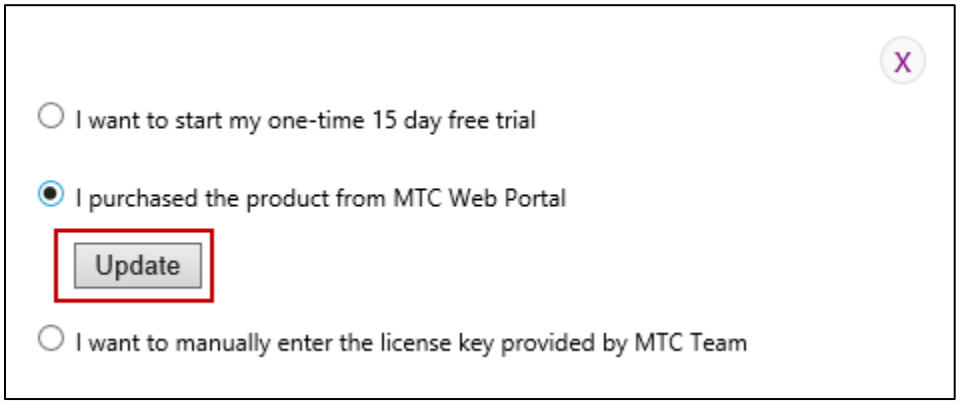

Note: For MTC Bundle Products, you have to use Cart Plus Icon that is present on the top right corner of that particular bundle for purchasing the license.

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

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