

MTC Product Free Trial
Product License Purchase
Buy Additional Users License

Quick Guide

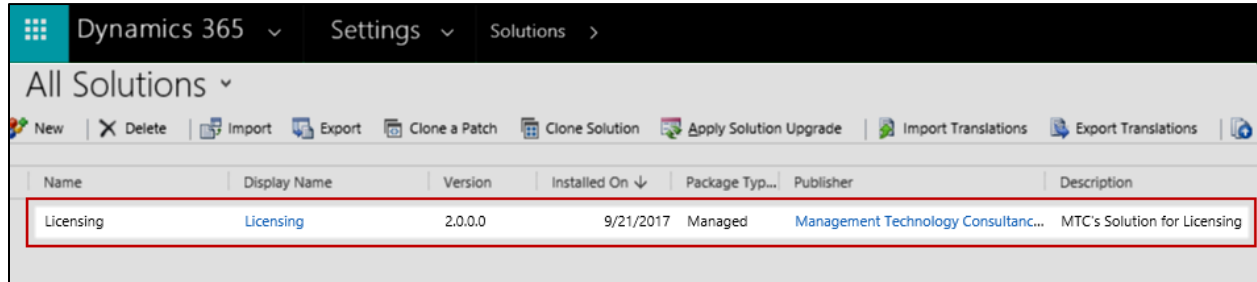


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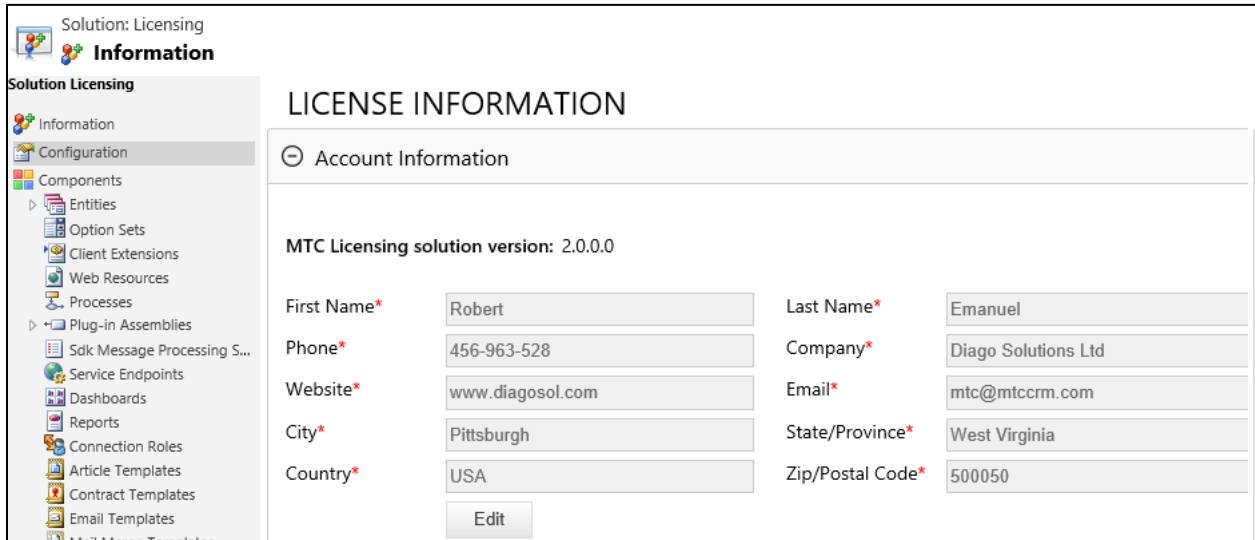
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Product Free Trial Activation

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.

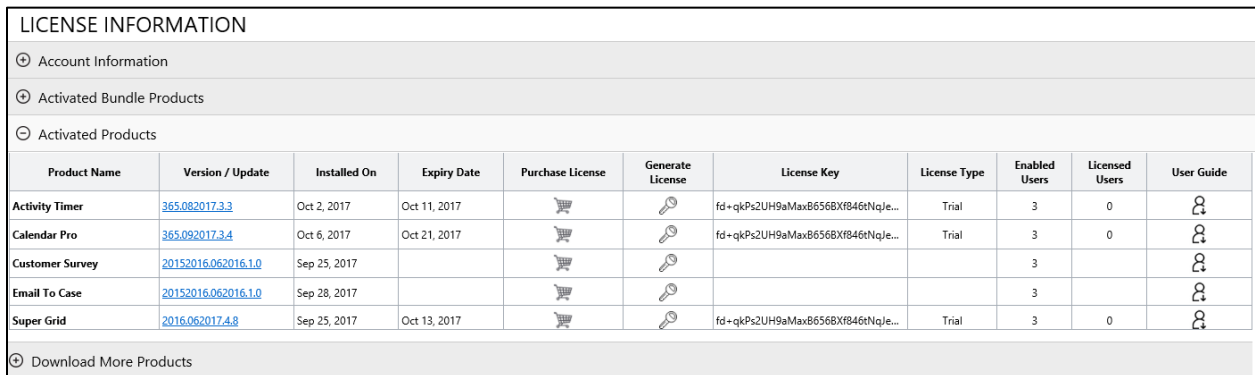


The screenshot shows the 'Solution: Licensing' configuration page. The 'Account Information' section is expanded, showing fields for user details. The 'MTC Licensing solution version' is 2.0.0.0.

MTC Licensing solution version: 2.0.0.0	
First Name*	Robert
Last Name*	Emanuel
Phone*	456-963-528
Company*	Diago Solutions Ltd
Website*	www.diagosol.com
Email*	mtc@mtccrm.com
City*	Pittsburgh
State/Province*	West Virginia
Country*	USA
Zip/Postal Code*	500050

[Edit](#)

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



The screenshot shows the 'LICENSE INFORMATION' section with three expandable categories: Account Information, Activated Bundle Products, and Activated Products. The 'Activated Products' category is expanded, showing a table of 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	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	

[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:


- a. 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										

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



PS: For extension of trial period please write to salesteam@mtccrm.com

☐ I purchased the product from MTC Web Portal

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

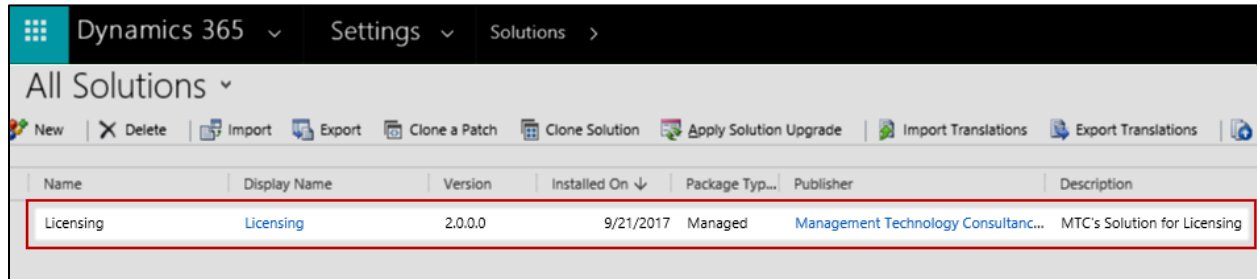
- b. Alternatively, the 15 day free trial license key will be generated by the first use of the product, allowing delay or an alternate User to start the trial with the appropriate Product’s Security Role. The free trial license key will be generated and updated in the **Activated Products** tab.

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.

Product License Purchase

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



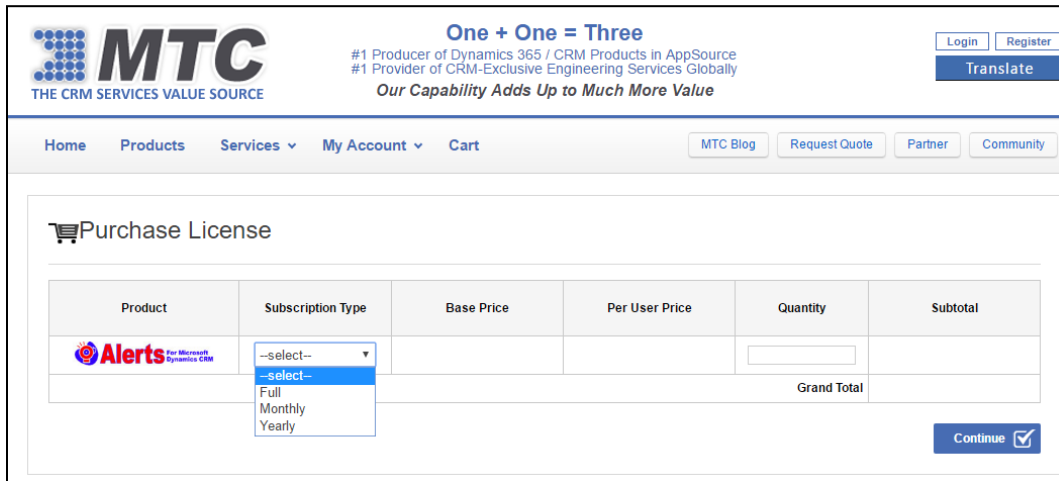
The Account Information window with Activated Products, Activated Bundle Products, and Download More Products will open.

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	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	
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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	
⊕ Download More Products										

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

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										

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





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#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

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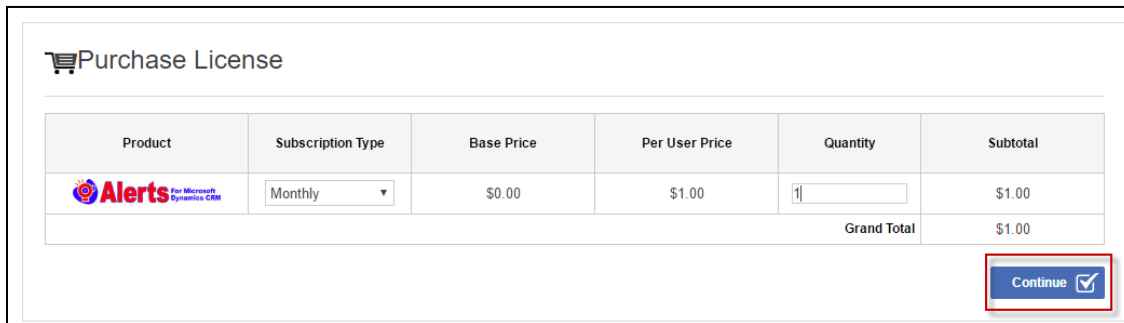
Home Products Services ▾ My Account ▾ Cart MTC Blog Request Quote Partner Community


 Purchase License


Product	Subscription Type	Base Price	Per User Price	Quantity	Subtotal
 Alerts For Microsoft Dynamics CRM	--select-- --select-- Full Monthly Yearly				
Grand Total					

Continue ☒

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




 Purchase License

Product	Subscription Type	Base Price	Per User Price	Quantity	Subtotal
 Alerts For Microsoft Dynamics CRM	Monthly	\$0.00	\$1.00	1	\$1.00
Grand Total					\$1.00

Continue ☒

An invoice with the requesting contact will be generated.

4. Click **“Accept-Pay.”**



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INVOICE
SUMMARY LINE ITEMS
Invoice: 00000000000000000000

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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

California
CA-91409
USA

Contact: 323-851-5008
Email: sales@mtdccrm.com
Requesting Contact: sales@mtdccrm.com


Currency
US Dollar

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Corp: www.MTCCRM.com
Community: www.DynamicsExchange.com

MTC Primary	Primary Direct	Primary E-mail	End User	PIO Ref	Name	Issue Date	Valid Till	Terms
Product Registered	323-851-5008	sales@mtdccrm.com			MTC - Alerts-MTDCCRM	2019-01-01	2019-12-31	Pro 1000

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 PIO Customer Add Text Edit Cancel Download PDF Print

For any queries contact - Salesteam@mtdccrm.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

CRM Organization Name:
Apply Coupon:

Choose Payment Process

☒ Enter a New Card

Enter Card Details

Credit Card Type:
Card Expiration Date(MM-YYYY):

Credit Card Number:
First Name:

Last Name:

Credit Card Billing Address Details

Company Name:
Country:

Street:
Postal Code:

City:
Phone:

State:

7. 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:
State:

Phone:
Country:

Street:
Postal Code:

City:

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

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

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
Total			\$1.00

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: Michelle Lee
Email: my_323@mtccrm.com
Requesting Contact: [REDACTED]


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
[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 [REDACTED] Paid by Credit card ending ...5016 – Thank You!



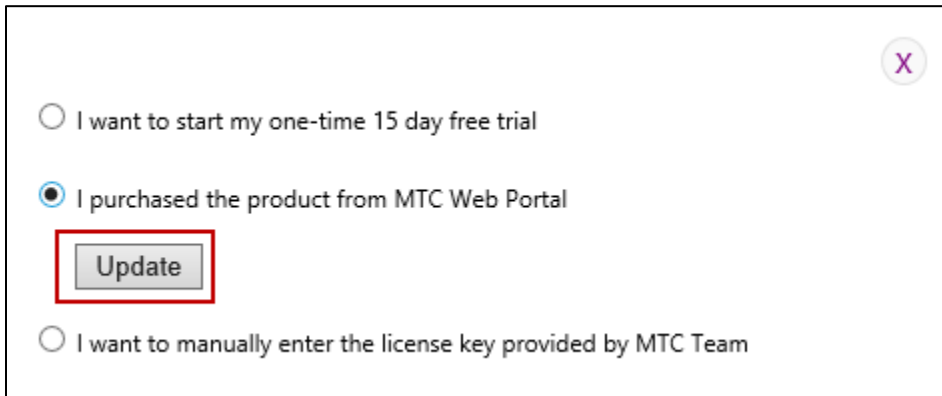
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For any queries contact - Salesteam@mtccrm.com or by calling 323-863-0077.
Thank You for Your Business!

- 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										

- 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.



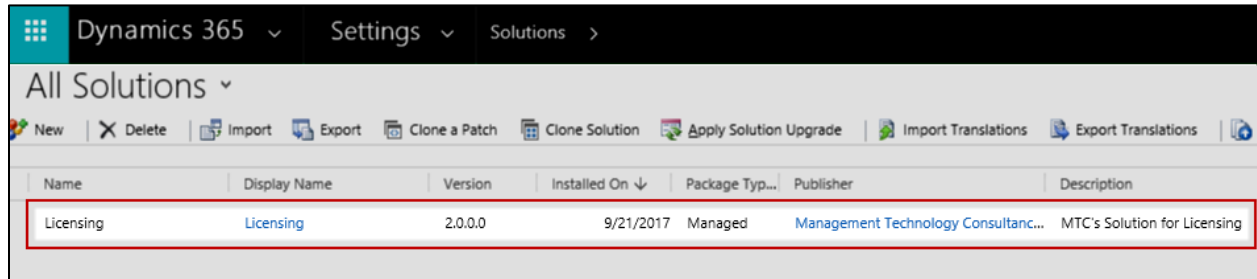
Note: For MTC Bundle Products, you have to use Cart Icon that is present on the top right corner of that particular bundle for purchasing the license.

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

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.


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	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	
⊕ Download More Products										

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

⊖ Activated Products										
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@EDJD				
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.


 Buy More License

Product	Subscription Type	Base Price	Per User Price	Quantity	Subtotal
	Monthly	\$0.00	\$1.00	1	\$1.00
Grand Total					\$1.00

Continue ☒

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

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



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INVOICE
SUMMARY LINE ITEMS
Invoice : 00000000000000000000

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: 323-851-5008
Email: info@mtccrm.com
Requesting Contact: info@mtccrm.com





Currency
US Dollar

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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
Requesting Contact	info@mtccrm.com	info@mtccrm.com			MTC: 00000000000000000000	00000000	00000000	00000000

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 Download PDF Print

For any queries contact - Salesteam@mtccrm.com or by calling 323-863-0077.
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 **“Save.”**

Payment Process

CRM Organization Name:

Apply Coupon:

Choose Payment Process

☒ Enter a New Card

Enter Card Details

Credit Card Type:

Card Expiration Date(MM-YYYY):

Credit Card Number:

First Name:

Last Name:

Credit Card Billing Address Details

Company Name:

Country:

Street:

Postal Code:

City:

Phone:

State:

Save

Cancel

- 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


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
Total			\$1.00

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
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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

Non-Confidential
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
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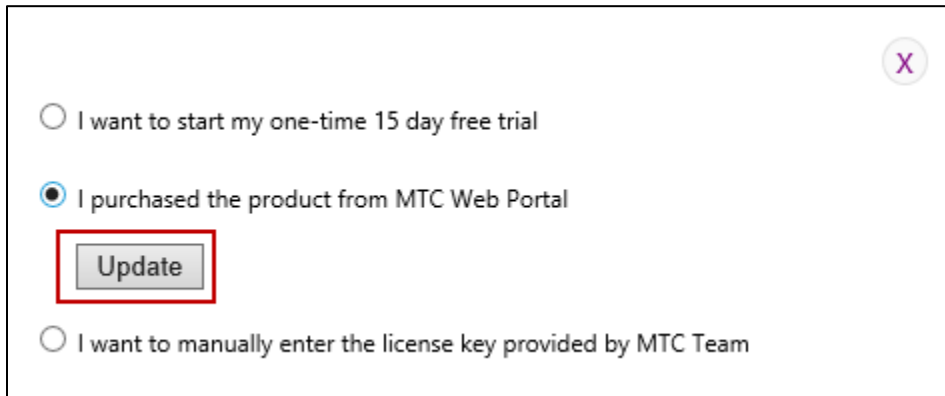
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LICENSE INFORMATION										
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Calendar Pro	365.092017.3.4									
Customer Survey	20152016.062016.1.0									
Email To Case	20152016.062016.1.0									
Super Grid	2016.062017.4.8									
⊕ Download 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.



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