

User Guide



Template to PDF

Document Version: 1.0

Solution Version: 365_022018_1_1



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Product Overview

Template to PDF is very easy-to-use and can be configured on all important CRM System and Custom Entities. With few clicks, a CRM user will be able to download target entity document templates into PDF files or may choose to send those PDF files as attachments in emails to targeted customers. With such an arrangement mission critical business activities can be accomplished in less span of time.

How does it benefit your Organization?

- Easy to use
- Affordable
- Configurable on all important system & custom entities
- One click conversion of document as PDF files in emails
- Auto –send emails with PDF attachments using a workflow.
- Save significant time and effort by eliminating complex process of generating PDF files from document templates.

How to install and Activate Template to PDF solution?

To install Template to PDF solution, please follow the below steps

1. Go to <https://www.mtccrm.com/> Products and download the latest solution.
2. A ZIP file would be downloaded to your Downloads Folder
3. Extract the contents of the ZIP file which gives you two more ZIP Files – one for solution and another for license as shown below.
4. Both the ZIP files have to be imported into your CRM for the solution to become functional.

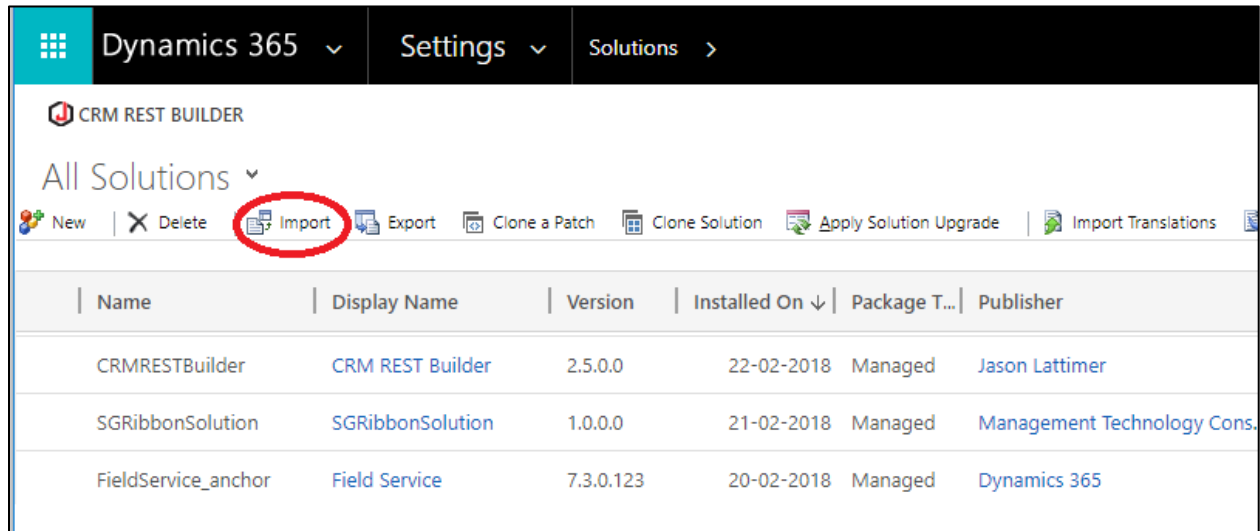
Note: First install Licensing solution followed by the Main Solution for best results.

Importing Licensing Solution

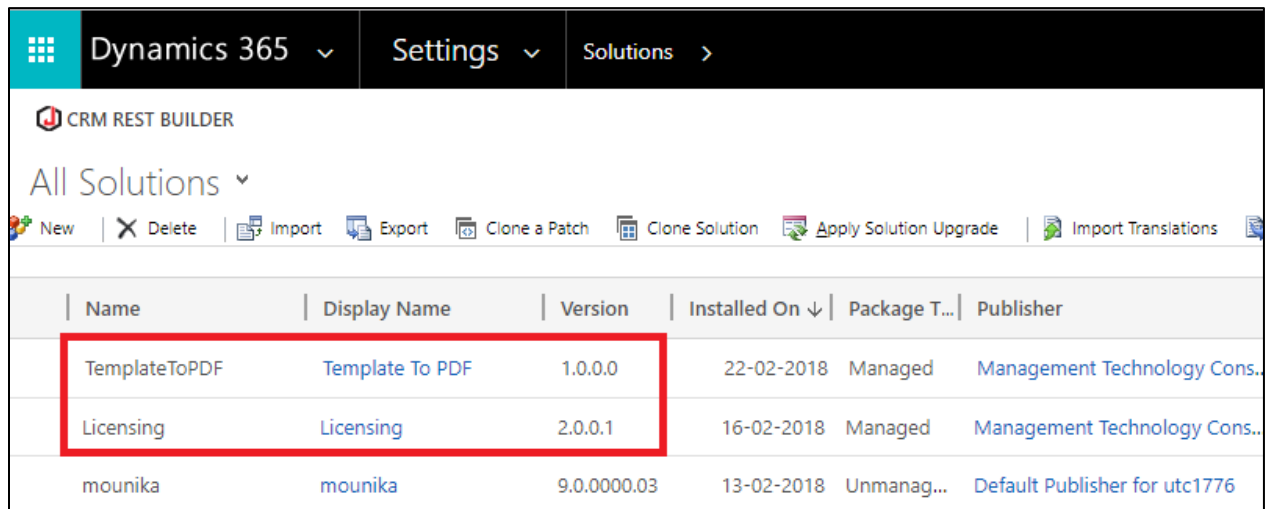
1. Open CRM and go to **Settings-> Solutions-> Import**.
2. Click on **Import** to upload the licensing solution first.
3. An Import window pops up where you can browse and select the path to the licensing solution
4. Click **Next** to proceed to next step.
5. A **Solutions Window** displaying the complete solution information appears.
6. Click on **Next** to continue.
7. An Import Options window appears. Tick the check box that says “Enable any SDK message processing steps included in the solution” and click on **Import** to begin the process
8. Once Import Customizations is done, import solution success message appears. Click on “Close” to exit the process.

Importing Template to PDF Solution

1. Open CRM and go to Settings -> Solutions -> Import.
2. Click on Import to upload the Template to PDF solution.

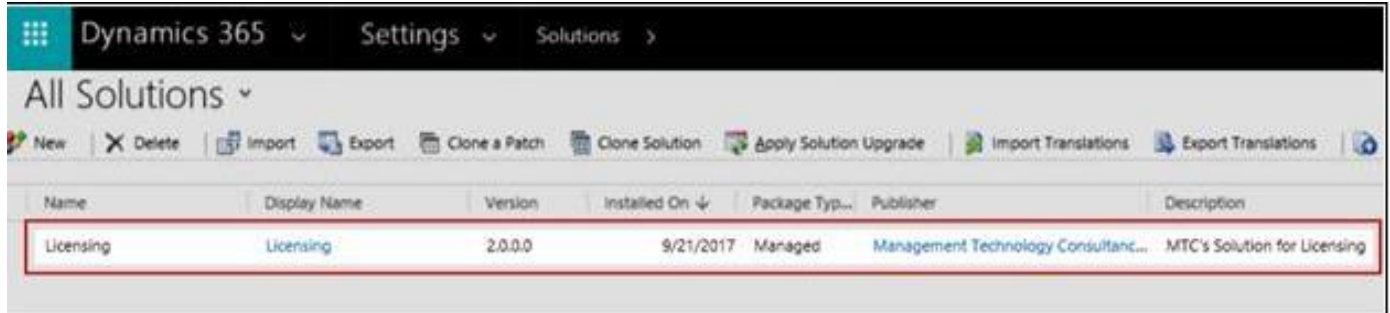


3. An Import window pops up where you can browse and select the path to the Multi-File Uploader solution.
4. Click Next to proceed to next step.
5. A Solutions Window displaying the complete solution information appears
6. Click on Import to begin the process.
7. An Import Customizations window appears with the message “Importing customizations. Please wait for the operation to complete...”
8. Once Import Customizations is done, import solution success message appears. Click on “Close” to exit the process.



Licensing

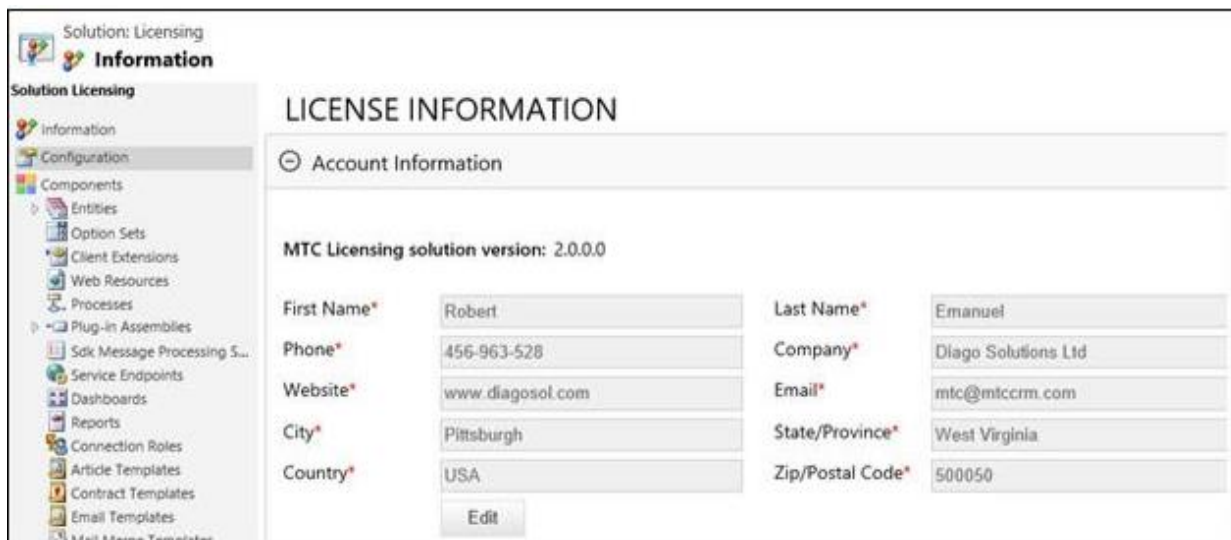
- Go to CRM -> Settings -> Solutions. This CRM access and these steps require the Administrator Security Role. Click on licensing solution for the Account Registration window



The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. A table lists available solutions, with the 'Licensing' solution highlighted by a red box.

| Name | Display Name | Version | Installed On | Package Type | Publisher | Description |
|-----------|--------------|---------|--------------|--------------|-------------------------------------|------------------------------|
| Licensing | Licensing | 2.0.0.0 | 9/21/2017 | Managed | Management Technology Consultanc... | MTC's Solution for Licensing |

- Complete the field details (Refer example below). All fields are mandatory. Click Submit.



The screenshot shows the 'Solution: Licensing' form in Dynamics 365. The 'Account Information' section is expanded, showing fields for contact and company 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 |

- 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.

| 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 | Also Available In | Survey |
| Attachment to Sharepoint | 365.092017.3.2 | Feb 22, 2018 | Mar 9, 2018 | | | fd+qkPs2UH9aMaxB656BXf8... | Trial | 3 | 0 | | | |
| Template To PDF | 1.0.0.0 | Feb 22, 2018 | Mar 9, 2018 | | | fd+qkPs2UH9aMaxB656BXf8... | Trial | 3 | 0 | | | |
| Notes Rollup | 1.0.0.4 | Feb 17, 2018 | Mar 4, 2018 | | | fd+qkPs2UH9aMaxB656BXf8... | Trial | 3 | 0 | | | |
| Sales Product Editor | 365.072017.3.4 | Feb 16, 2018 | Mar 31, 2018 | | | 03190d580305514253120a19... | Trial | 3 | 0 | | | |
| Super Grid | 2016.062017.4.6 | Feb 16, 2018 | Apr 7, 2018 | | | 03190d580305514253120a1a... | Trial | 3 | 0 | | | |

- All MTC products downloaded are shown in “Activated Products” or “Activated Bundled Products.”
- You can see Template to PDF installed date and expiry date along with purchasing option

Generating Free Trial

There are 2 ways to generate 15 day free trial license key for Template to PDF.

- Click on Key Icon under Generate License of Activated Products for Template to PDF.

| 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 | Also Available In | Survey |
| Attachment to Sharepoint | 365.092017.3.2 | Feb 22, 2018 | Mar 9, 2018 | | | fd+qkPs2UH9aMaxB656BXf8... | Trial | 3 | 0 | | | |
| Template To PDF | 365.022018.1.1 | Feb 22, 2018 | Mar 9, 2018 | | | fd+qkPs2UH9aMaxB656BXf8... | Trial | 3 | 0 | | | |
| Report To PDF | 365.092017.3.4 | Feb 23, 2018 | Mar 10, 2018 | | | fd+qkPs2UH9aMaxB656BXf8... | Trial | 3 | 0 | | CRMStarterPack | |
| Notes Rollup | 1.0.0.4 | Feb 17, 2018 | Mar 4, 2018 | | | fd+qkPs2UH9aMaxB656BXf8... | Trial | 3 | 0 | | | |
| Sales Product Editor | 365.072017.3.4 | Feb 16, 2018 | Mar 31, 2018 | | | 03190d580305514253120a19... | Trial | 3 | 0 | | | |
| Super Grid | 2016.062017.4.6 | Feb 16, 2018 | Apr 7, 2018 | | | 03190d580305514253120a1a... | Trial | 3 | 0 | | | |

You will see a window with 3 options. 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

☐ I purchased the product from MTC Web Portal

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

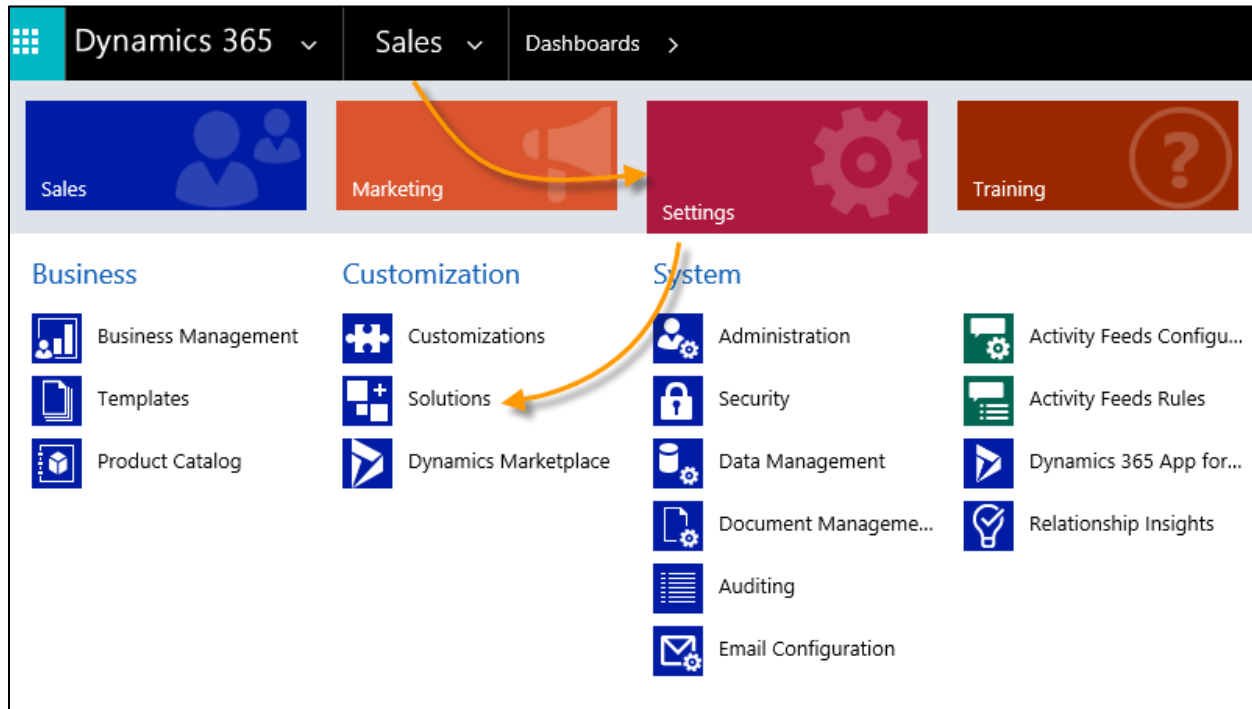
b. Alternatively, the 15 day free trial license key will be generated by the first use of the product, allowing delay or an alternate User to start the trial with the appropriate Product's Security Role. The free trial license key will be generated and updated in the Activated Products tab.

- To purchase this product, click on "cart icon" under purchase license and follow the series of steps as guided by the system. For any queries, write down to Salesteam@mtccrm.com

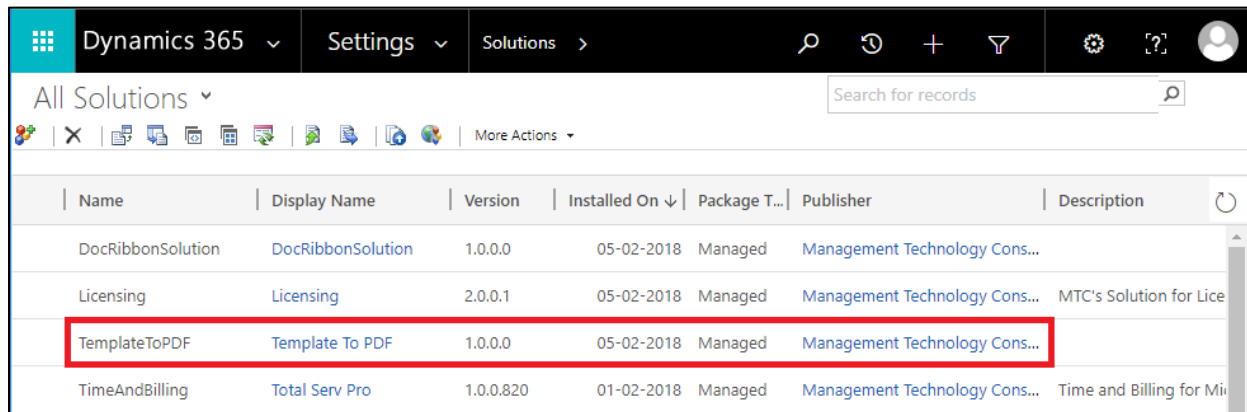
Configuration Settings in Template to PDF:

To start using Template to PDF solution, you are required to do some basic configuration settings inside your D365 as explained below.

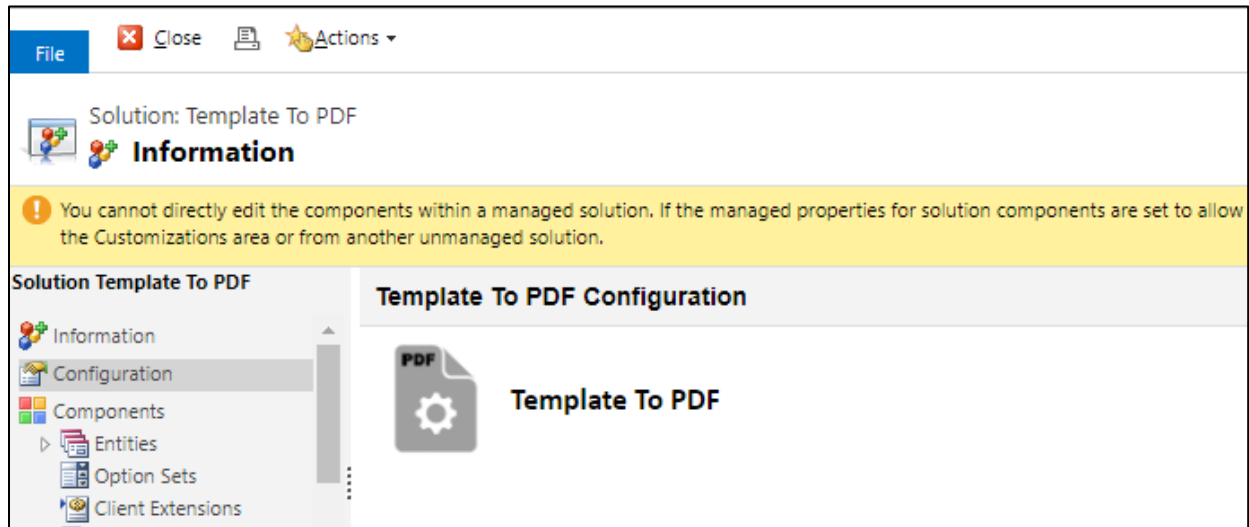
1. Go to **Settings** → **Solutions**.



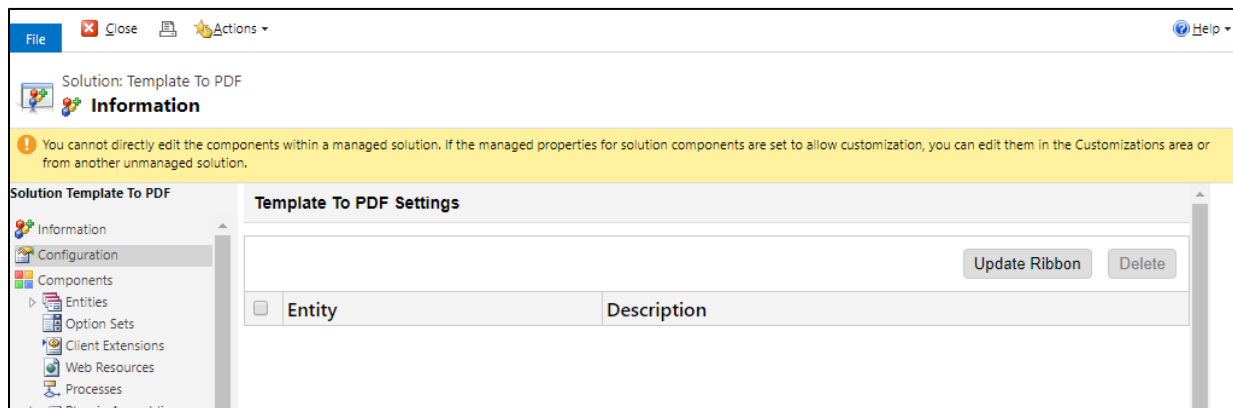
2. All the solutions installed in your D365 will show up. Click on Template to PDF Solution.



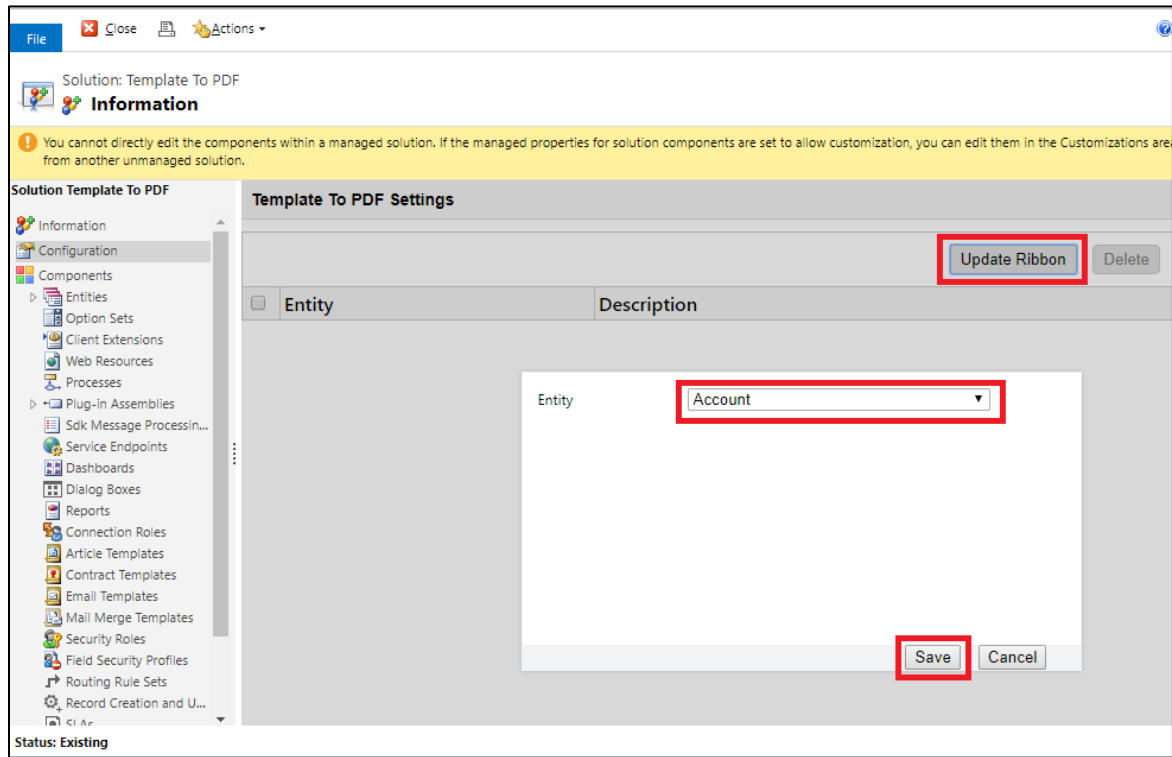
3. Template to PDF Settings window pops up. In here, you can see Template to PDF option.



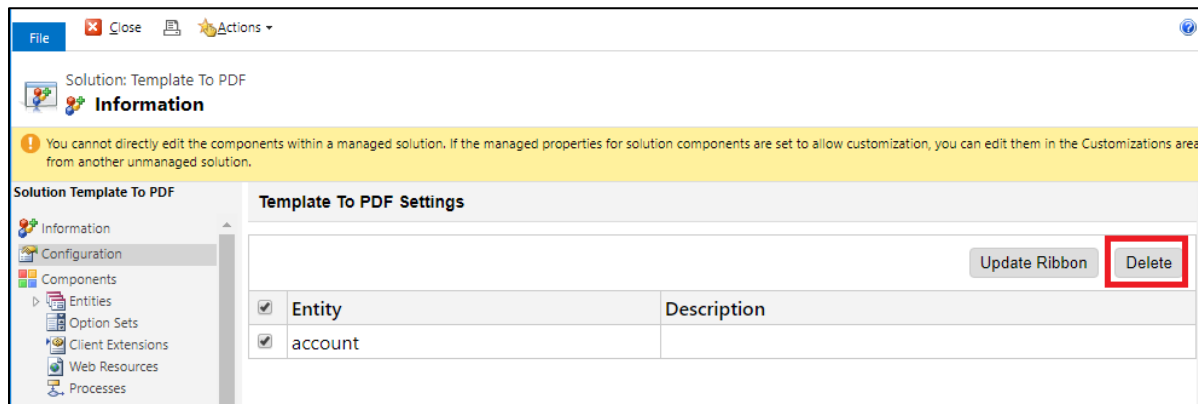
4. Click on the Template to PDF, below window pops up.



5. Click on the Update Ribbon button and select the required entity from the look up. And click on save button.



6. Account entity gets added in the list. If user want to delete the record anytime select the record and click on the delete button on the top.



Note:

- You can select only one entity at a time.
- By deleting the entity in settings template to PDF option will be disabled on that particular entity.

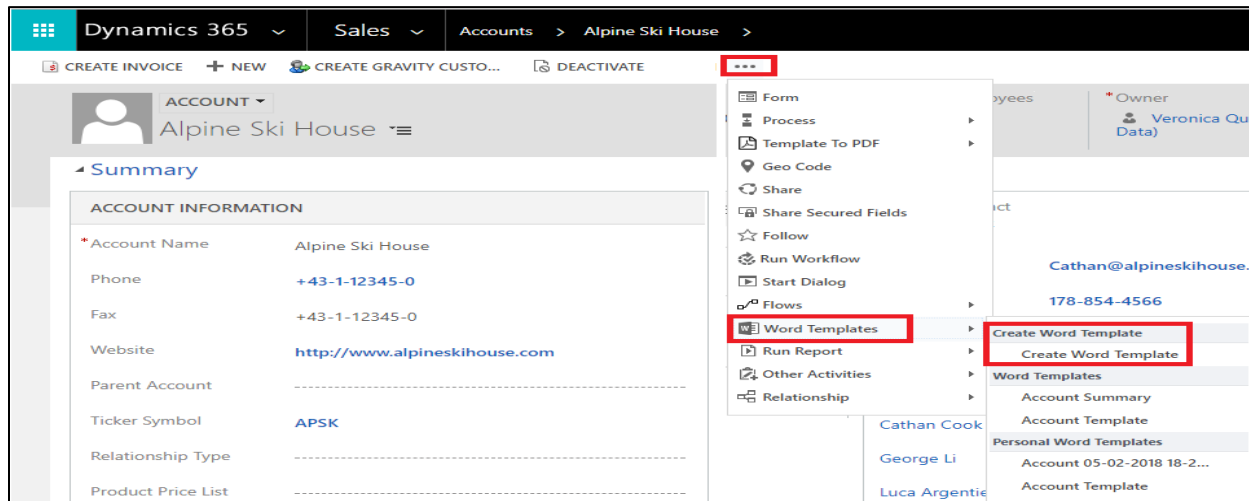
Template to PDF Functionality

Considering that all the recommended Template to PDF configuration settings are being done, let us check Template to PDF Functionality.

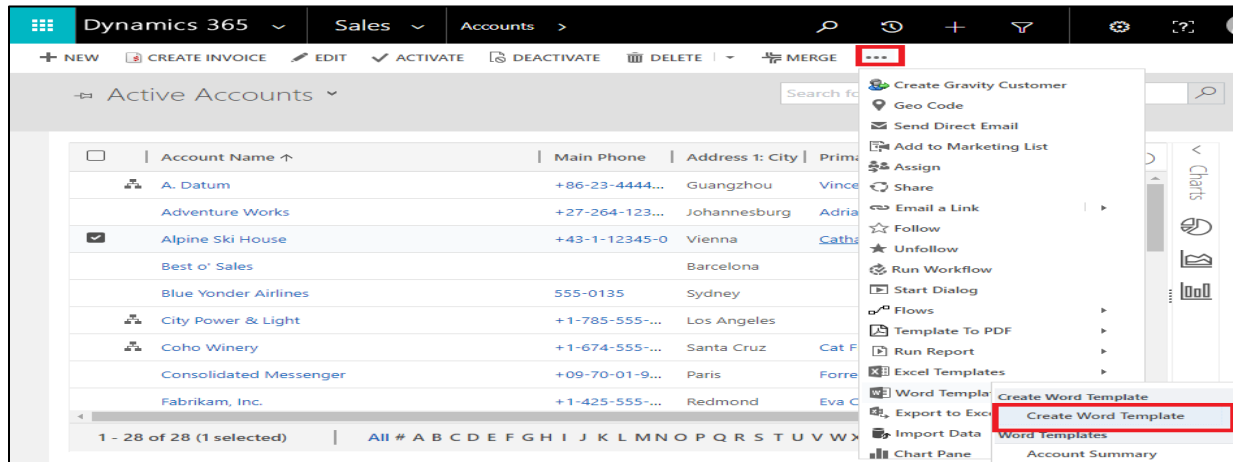
Create a Word template

In Dynamics 365 word templates can be created from three places.

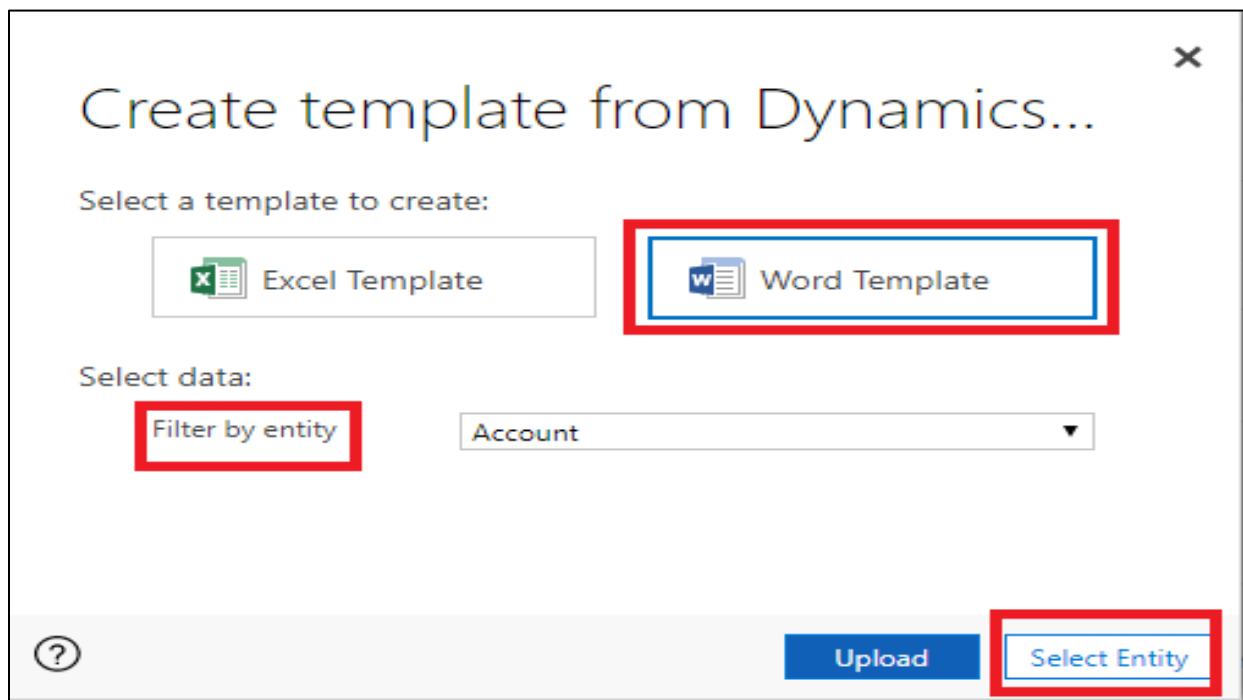
- Navigate to **settings** → **Templates** → **Document Templates** and click on **New** button to create a new Template.
- On any particular entity (For Ex: Account) open the required record and click on the (...) button on the top. From the drop down select **Word Templates-> Create word Template**. Templates created here are personal and available only to the user creating the template.



- Word templates can also be created from the Home grid by clicking on the (...) button on the top. From the drop down select **Word Templates-> Create word Template**.



Upon clicking the create word template, from the below window select an entity to filter with, and then click Word Template > Select Entity.



A window opens to provide options in navigating across various entities depending on the relationship types. Select only the appropriate relationships that you wish to add to Dynamics 365 data to word template.

Select Entity Account

This feature has requirements and considerations you need to understand to successfully create a template. Before you proceed, see [Using Word templates in Dynamics 365](#).

1:N Relationship

| <input type="checkbox"/> | Entity Name | Schema Name ↑ | ↺ |
|--------------------------|-----------------|---------------------|---|
| <input type="checkbox"/> | Agreement | msdyn_account_msdyr | |
| <input type="checkbox"/> | Agreement | msdyn_account_msdyr | |
| <input type="checkbox"/> | Customer Ass... | msdyn_account_msdyr | |
| <input type="checkbox"/> | Estimate Line | msdyn_account_msdyr | |
| <input type="checkbox"/> | Estimate Line | msdyn_account_msdyr | |
| <input type="checkbox"/> | Fact | msdyn_account_msdyr | |
| <input type="checkbox"/> | Fact | msdyn_account_msdyr | |
| <input type="checkbox"/> | Invoice Line | msdyn_account_msdyr | |

1 - 104 of 104 (1 selected)

N:1 Relationship

| <input type="checkbox"/> | Entity Name | Schema Name ↑ | ↺ |
|--------------------------|-------------------|--------------------------|---|
| <input type="checkbox"/> | Lead | account_originating_lead | |
| <input type="checkbox"/> | Account | account_parent_account | |
| <input type="checkbox"/> | Contact | account_primary_contact | |
| <input type="checkbox"/> | Business Unit | business_unit_accounts | |
| <input type="checkbox"/> | Facility/Equip... | equipment_accounts | |
| <input type="checkbox"/> | User | lk_accountbase_createdb | |
| <input type="checkbox"/> | User | lk_accountbase_createdo | |
| <input type="checkbox"/> | User | lk_accountbase_modified | |

1 - 24 of 24 (0 selected)

N:N Relationship

| <input type="checkbox"/> | Entity Name | Schema Name ↑ | ↺ |
|--------------------------|----------------|--------------------------|---|
| <input type="checkbox"/> | Lead | accountleads_association | |
| <input type="checkbox"/> | Marketing List | listaccount_association | |

1 - 2 of 2 (0 selected)

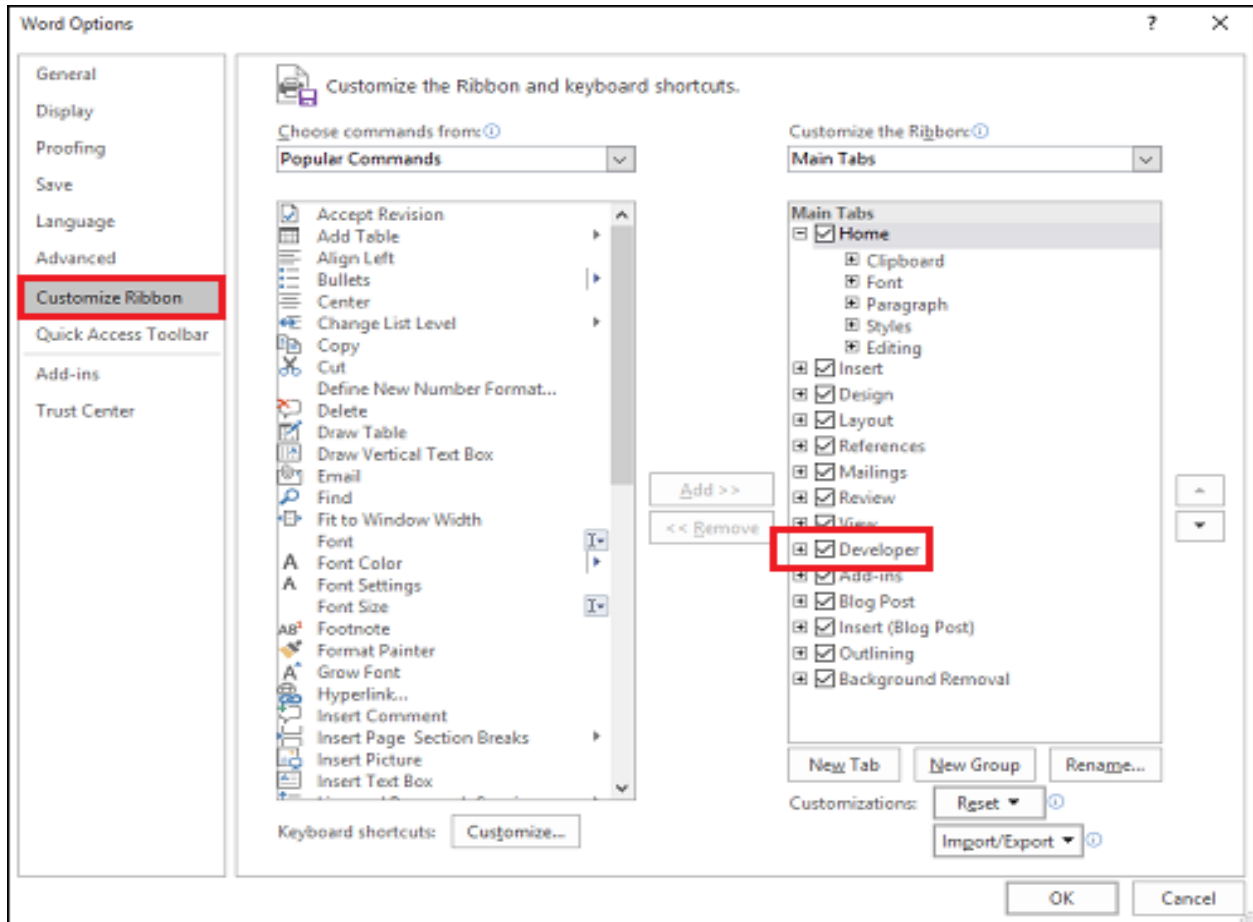
Download Template

Click **Download Template** on the Select Entity page to create a Word file on your local PC with the exported entity included as XML data.

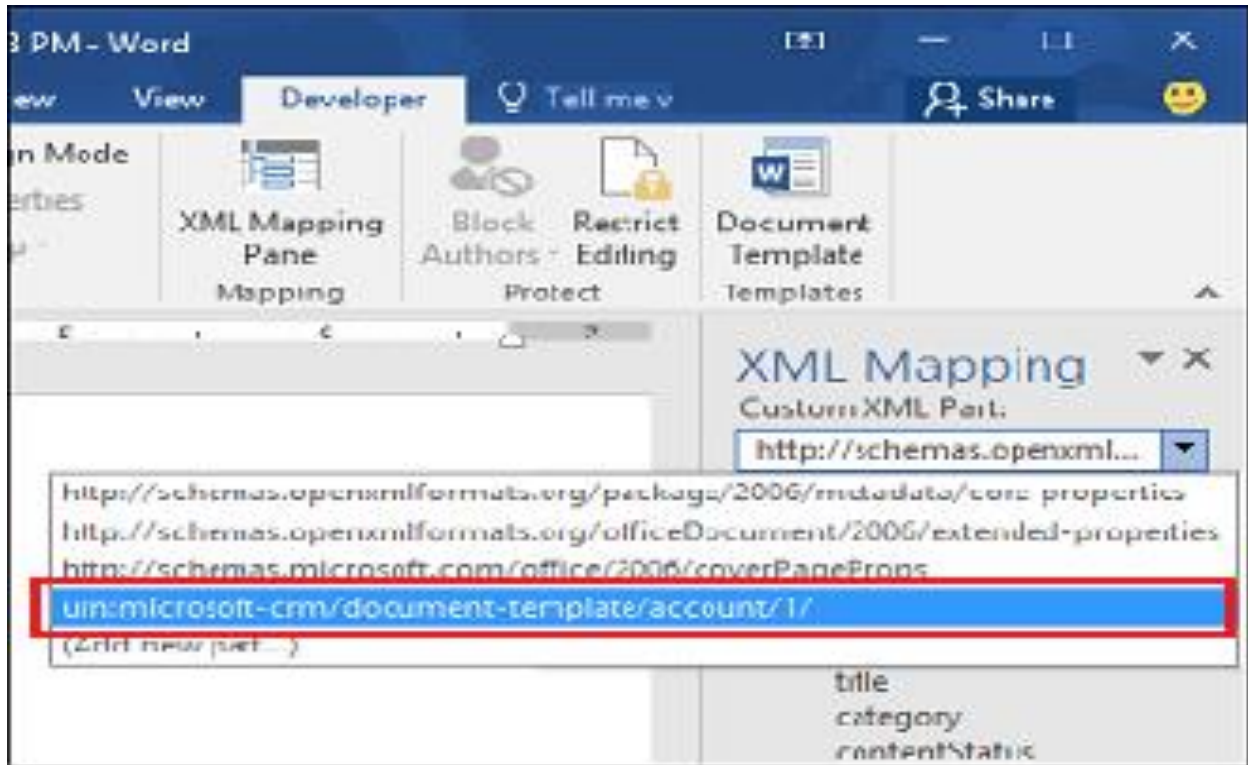
Enable the Developer tab & Mapping fields

Open the word document that is created using the download template button. Check for the Developer button on the word document. If it is disabled it should be enabled using Developer tab.

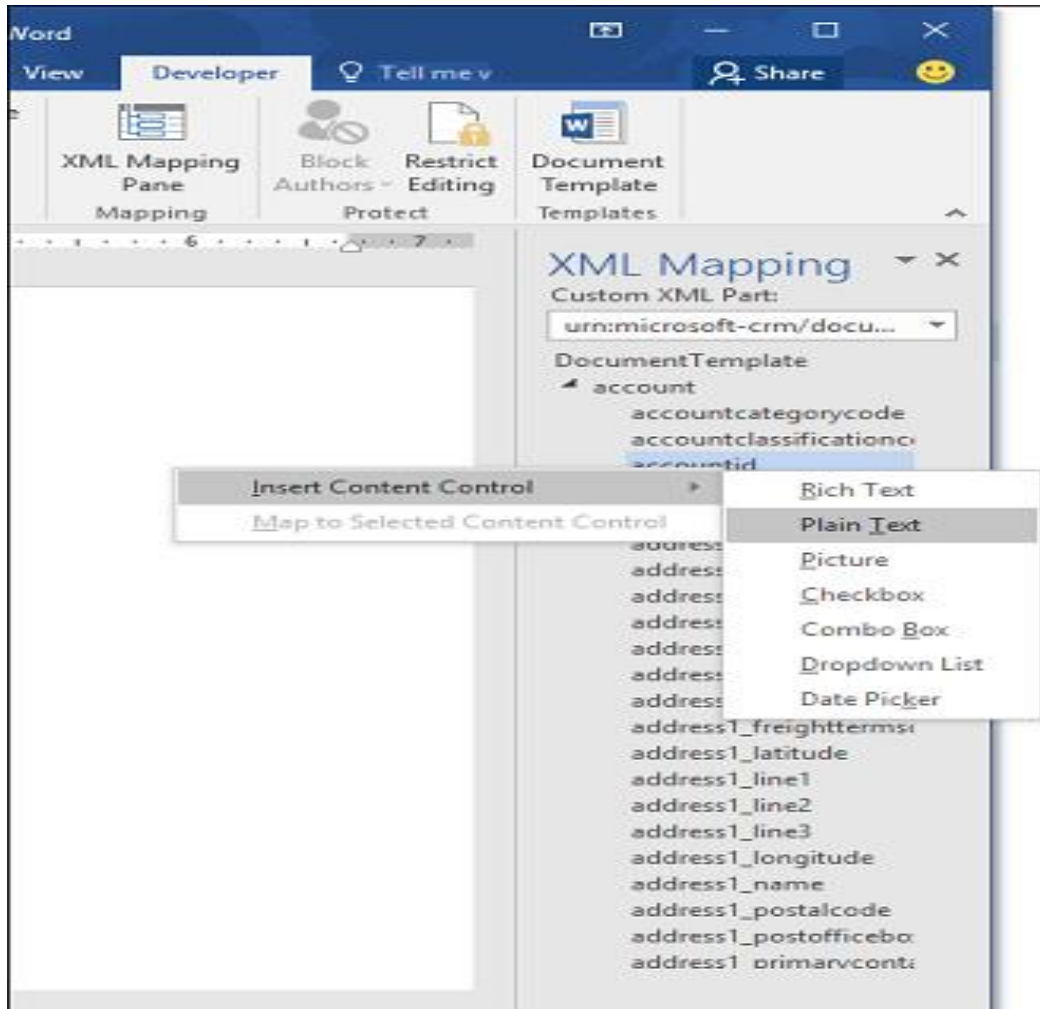
- For this navigate to **File → Options → Customize Ribbon**, and then enable Developer



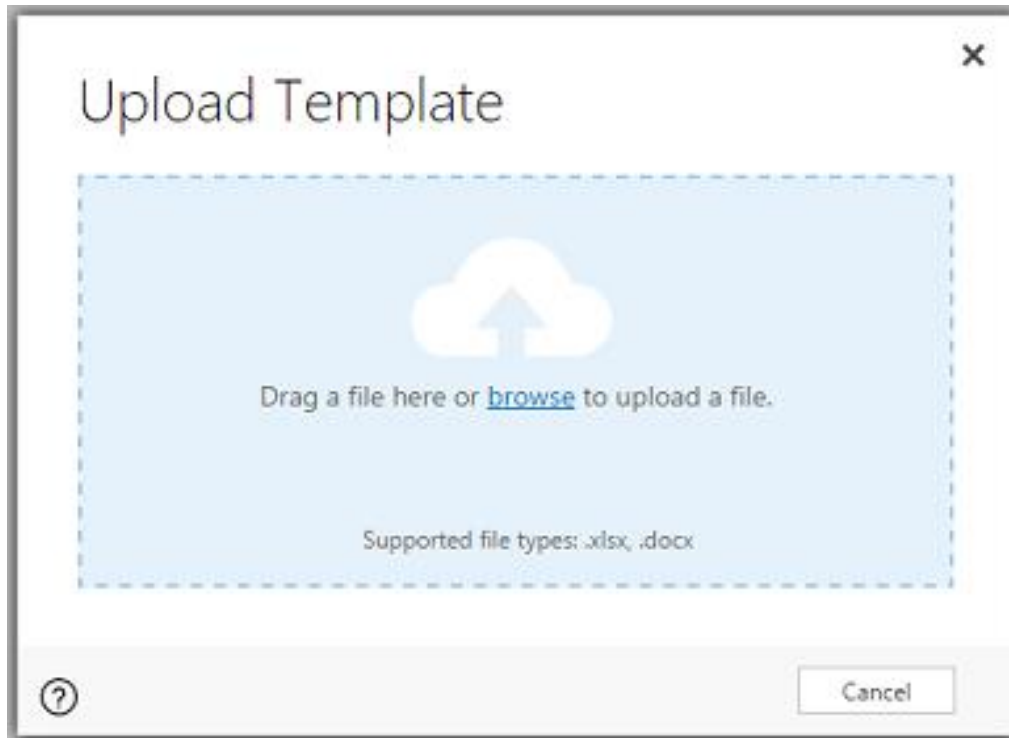
- Click Ok. Developer tab now appears in the Word ribbon.
- Under the developer tab Select the Dynamics 365 XML schema which begins with “urn: microsoft-crm/document-template/”.



Add the required fields to the document by expanding the Dynamics 365 entity, right-click the entity field, and then click **Insert Content Control → Plain Text**.



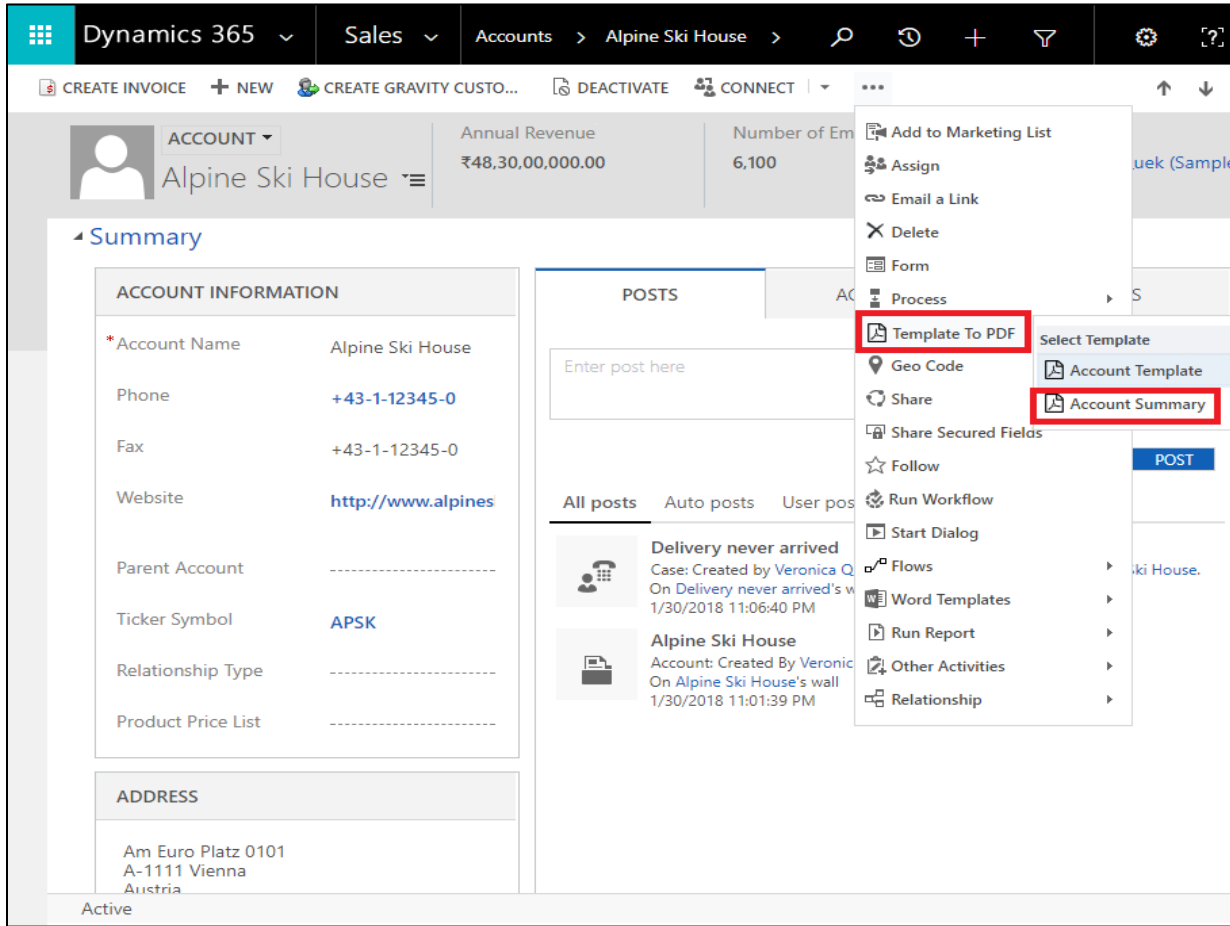
Add additional entity fields, add descriptive labels and text, and format the document.



- Browse created word template and upload the template.
- Click Upload.

Generate a PDF File from the Template to PDF

- Open any record with the required information for which you want to create a PDF file. For instance open an account record in sales.
- Click (...) and select Template to PDF option which will have all the related templates in it.
- Select particular template that you wish to create a PDF file.



The screenshot shows the Microsoft Dynamics 365 interface for the 'Alpine Ski House' account. The 'Summary' tab is selected, displaying account information such as 'Account Name: Alpine Ski House', 'Phone: +43-1-12345-0', and 'Website: http://www.alpineskihouse.com'. A context menu is open over the 'POSTS' section, showing options like 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', 'Form', 'Process', 'Template To PDF', 'Geo Code', 'Share', 'Share Secured Fields', 'Follow', 'Run Workflow', 'Start Dialog', 'Flows', 'Word Templates', 'Run Report', 'Other Activities', and 'Relationship'. The 'Template To PDF' and 'Account Summary' options are highlighted with red boxes.

Click on the selected template where two options will be enabled

- **Download PDF**
File will be downloaded on your local PC where you can view it in PDF format.

1 / 2

| | | |
|---|---|---|
| | Alpine Ski House http://www.alpineskihouse.com Phone: +43-1-12345-0 Am Euro Platz 0101 Vienna, A-1111 Austria | ACCOUNT Annual Revenue: 48,30,00,000.00 No. Employees: 6,100 Parent Account: Ticker: APSE INDUSTRY: Entertainment Retail SIC Code: |
| DESCRIPTION: Alpine Ski House grew out of a small company making ski jackets in our basement. Today, we are the top choice of winter sports apparel for professional athletes and enthusiasts around the world. For us at Alpine ski house, our love of wild and beautiful places translates into apparel that helps you enjoy them in comfort. | | PRIMARY CONTACT: Cathan Cook |

Other Contacts

| FULL NAME | EMAIL |
|-----------------|-----------------------------|
| Cathan Cook | Cathan@alpineskihouse.com |
| Luca Argentiero | luca@alpineskihouse.com |
| William Flash | williamf@alpineskihouse.com |
| George Li | georgeli@alpineskihouse.com |
| Ryan Spanton | ryans@alpineskihouse.com |

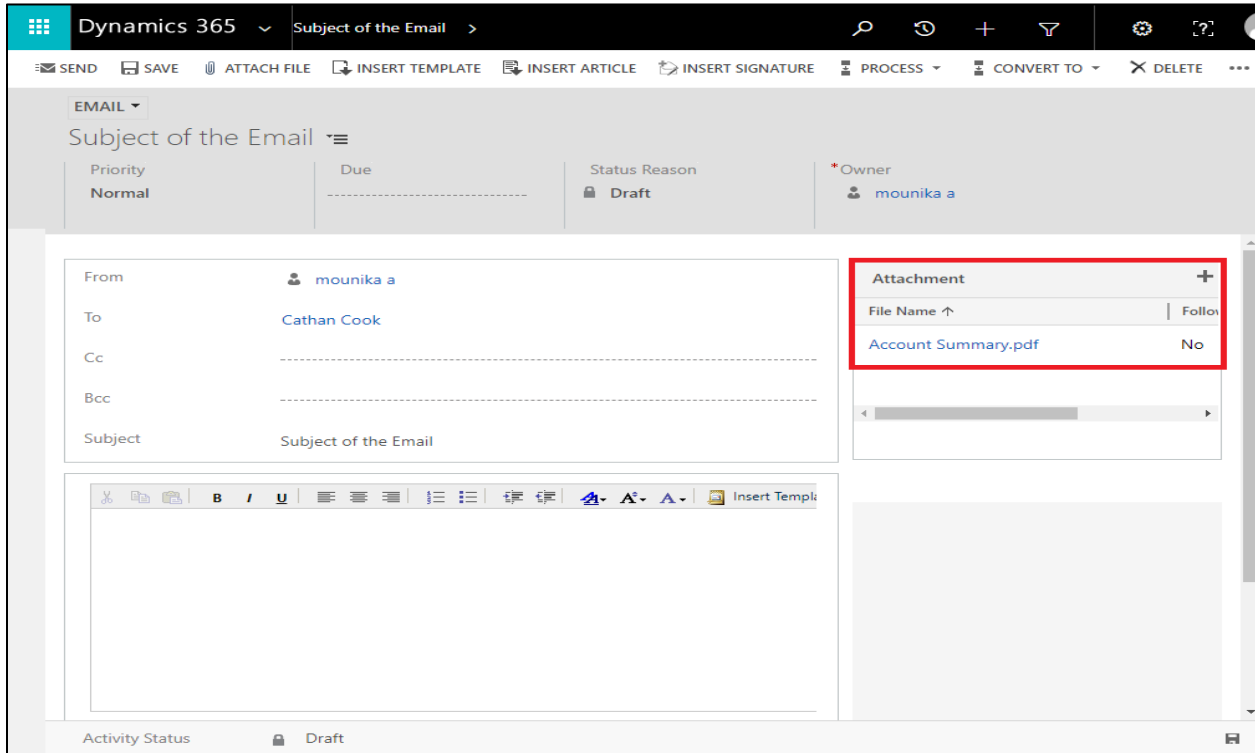
RECENT OPPORTUNITIES

| TOPIC | STATUS | ACTUAL CLOSE DATE | ACTUAL REVENUE | EST. CLOSE DATE | EST. REVENUE |
|---|-------------|-------------------|----------------|-----------------|--------------|
| Very likely will order Product SKU M1600 and M1650 this year | In Progress | | | 05-06-2017 | 1,87,500.00 |
| Incorporating home appliances into their resorts to create a more comfortable environment | Canceled | 27-04-2015 | 0.00 | 18-04-2015 | 2,30,000.00 |

Activate Windows
 Go to Settings to activate Windows

- **Send PDF attachment**

Upon clicking the send PDF attachment an email activity will be created with the PDF file attached to it.



Dynamics 365 Subject of the Email

SEND SAVE ATTACH FILE INSERT TEMPLATE INSERT ARTICLE INSERT SIGNATURE PROCESS CONVERT TO DELETE

EMAIL Subject of the Email

Priority: Normal Due: Status Reason: Draft Owner: mounika a

From: mounika a To: Cathan Cook Cc: Bcc: Subject: Subject of the Email

| Attachment | |
|---------------------|--------|
| File Name ↑ | Follow |
| Account Summary.pdf | No |

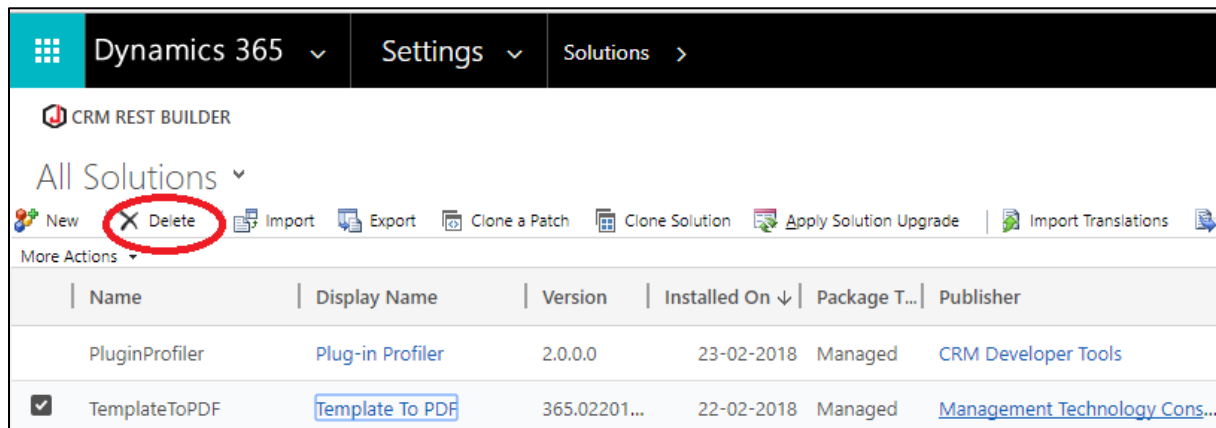
Activity Status Draft

Once the email content is created and is ready to send to a customer click on the **Send** button on the top.

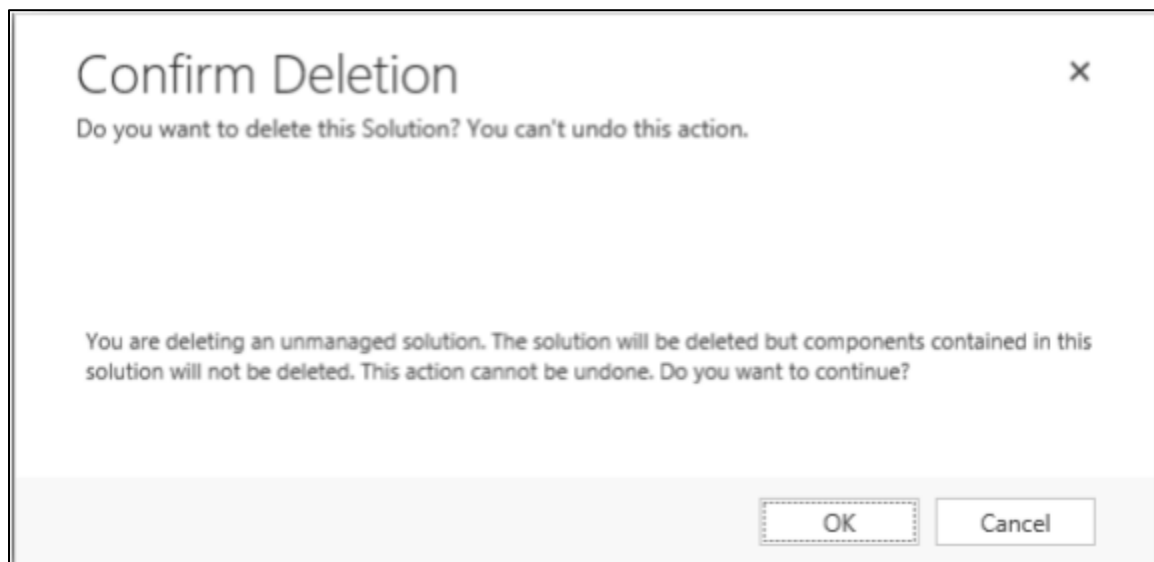
Uninstallation of Template to PDF solution in D365/CRM

To uninstall Template to PDF, please follow the below procedure.

1. Open your active CRM and navigate through Settings -> Solution.
2. Select the solution and its components by checking the boxes against them.



3. Click on "Delete" button on the ribbon. A window will pop-up as shown below



4. Click "OK" to uninstall the solution from your CRM.
5. Refresh the CRM page to see the solution disappear

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 MTC's low-cost and fixed-rate professional services current rate schedule: 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. 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 users 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, or 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.

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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.

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

8. 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.
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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.

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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.

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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 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.