



Microsoft Dynamics CRM / XRM Platform



User Guide



CRM Versions Supported: CRM 2011 and CRM Online

Copy Record Set is an add-on Product for Microsoft Dynamics CRM 2011 and CRM Online. Works on all Entities such as Opportunity, Quote, Order, Invoice, Lead, Accounts etc. Easy to operate and saves time to improve business quality. Works on all browsers.

Coding Version: 2.0.0.1

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Table of Contents

COPYRIGHT.....	2
DISCLAIMER.....	2
PRODUCT OVERVIEW	4
Key Benefits:.....	4
Copy Record Set useful for	4
LICENSE KEY	5
INSTALLATION PROCESS.....	6
LICENSE KEY INSTALLATION	10
SECURITY ROLE PRIVILEGES	11
Adding Security roles at User level.....	11
COPY RECORD SET FOR ACCOUNT, LEAD AND CONTACT ONLY.....	13
Example.....	13
Example for 1:N relationship.....	14
Example for N:N relationship	16
COPY RECORD SET FOR OTHER ENTITIES	17
UNINSTALLATION PROCESS.....	20
MTC OVERVIEW	21
The Global CRM Community DynamicsExchange.com.....	21
End User License Agreement (EULA)	22

Table of Figures

Figure 1 : Developer Resources.....	5
Figure 2 : Organization Unique Name.....	5
Figure 3 : Import Solution.....	6
Figure 4 : Select Solution Package.....	7
Figure 5 : Importing Options window	7
Figure 6: Import Solution	8
Figure 7 : Solution importing.....	8
Figure 8: Solution successfully imported	9
Figure 9 : Licensing window.....	10
Figure 10 : User level Settings.....	11
Figure 11 : Manage Roles.....	12
Figure 12 : Manage User Roles	12
Figure 13: Advance Find pop up Screen.....	13
Figure 14: New Copy Record Setting.....	14
Figure 15: Relationship Details	15
Figure 16: Relationship Details	16
Figure 17: New Copy Record Setting.....	16
Figure 18: CRM screen showing Opportunities	17
Figure 19: CRM showing new created record.....	18
Figure 20 : Deleting Copy Record Set Solution	20
Figure 21 : Uninstall Solution	20

Product Overview

MTC is a visionary in the state-of-the-art delivery of latest technologies for Microsoft Dynamic CRM at the lowest possible costs to global markets of small to medium-sized business. Microsoft Dynamics CRM Copy Record Set is an add-on component developed by MTC to address the functional gaps existing in Microsoft Dynamics CRM and give a complete end-to-end solution to CRM business users easing the tiring process of creating quotes, orders and invoice reducing the probabilities of any error occurrence. Our copy quote solution aims at scaling high your business manager's customer handling capabilities, a vital need that helps you to stay competitively ahead, by addressing the current concerns involved in manual quote creation process. ROI is surely justified by faster and instant response to your customer thriving for a high success rate of winning a deal in this customer-driven age, with less time and effort utilization — a real-time possibility through our low-cost add-on product.

Key Benefits:

- Can reuse already existing Q.O.I for future prospects.
- Effortless process to create Q.O.I allows you save lot of time.
- It allows you to quickly publish, reuse and respond to your customer on time.
- Multiple new records can now be added without opening any new sub-windows or forms and edited without ever leaving the grid to substantially reduce data entry time.
- Data accuracy is improved by the ease of data correction thereby encouraging data error maintenance in all levels of the company which improves the company image.
- Data formatting quality and uniformity greatly enhanced by the ability to audit and edit on-the-fly so easily improves marketing efforts and CRM User appreciation.
- Fast deployment and easy integration with your CRM application.

Copy Record Set useful for

S.No	Entity Name	Description
1	Account	Copying Account, and its Notes and its Relationships
2	Case	Copying case and its Notes and its Activities
3	Contact	Copying Contact, and its Notes and its Relationships
4	Invoice	Copying Invoice and its Products, and its Notes
5	Invoice Product	Copying only Invoice product
6	Lead	Copying Lead, and its Notes and its Relationships
7	Opportunity	Copying Opportunities and its Products, and its Notes
8	Opportunity Product	Copying only Opportunity Product
9	Order	Copying Order and its Products, and its Notes
10	Order Product	Copying only Order Product
11	Price List	Copying only Price list
12	Quote	Copying Quote and its Products, and its Notes
13	Quote Product	Copying only Quote Product

License Key

- To install Copy Record Set you will require License Key, which you can get by sending an E-mail request to salesteam@mtccrm.com with your Organization Unique Name.
- To access your Organization Unique Name Click on **settings**→**Customizations**→**Developer resources** as shown

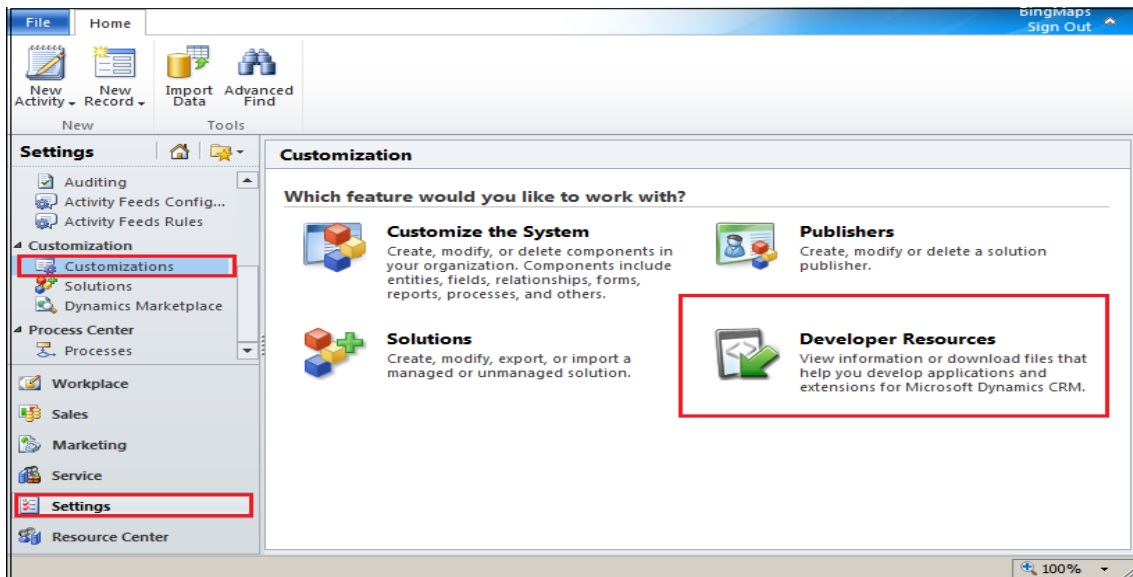


Figure 1 : Developer Resources

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

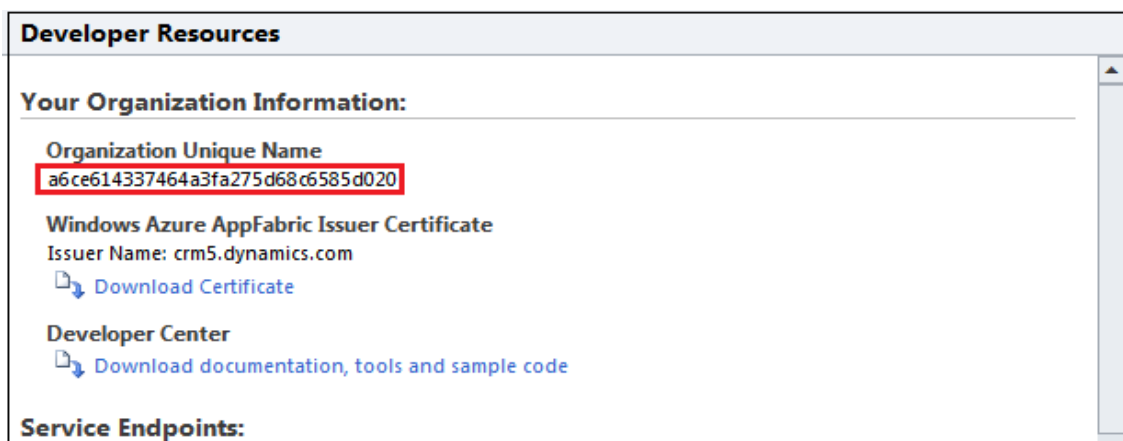


Figure 2 : Organization Unique Name

- Send this Organization Unique Name through Email and you will receive your Licensing Key within 24 hours.

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

Installation Process

To install the Copy Record Set the following steps has to be followed

STEP 1:

- For free trial go to <http://www.dynamicsexchange.com/CR.aspx> click on Download Copy Record Set Solution.

STEP 2:

- After the download completes, a new window will open asking you permission to save the file Click on Save. It will save the file in Downloads folder.
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.

Mtc_CopyRecordSet_2_0_1_0_managed.zip
Licensing_1_0_3_0_managed.zip

NOTE: To install the Copy Record Set SOLUTION the above two files need to be imported into CRM. Import Licensing Solution first and later import the Managed Copy Record Set Solution.

STEP 3:

- To import the solution Open your CRM click on **settings**→ **solution**→ **import** to open import Solution window.
- Below is the Steps shown for Importing Managed Solution. Please follow the same procedure to import the Licensing solution also.

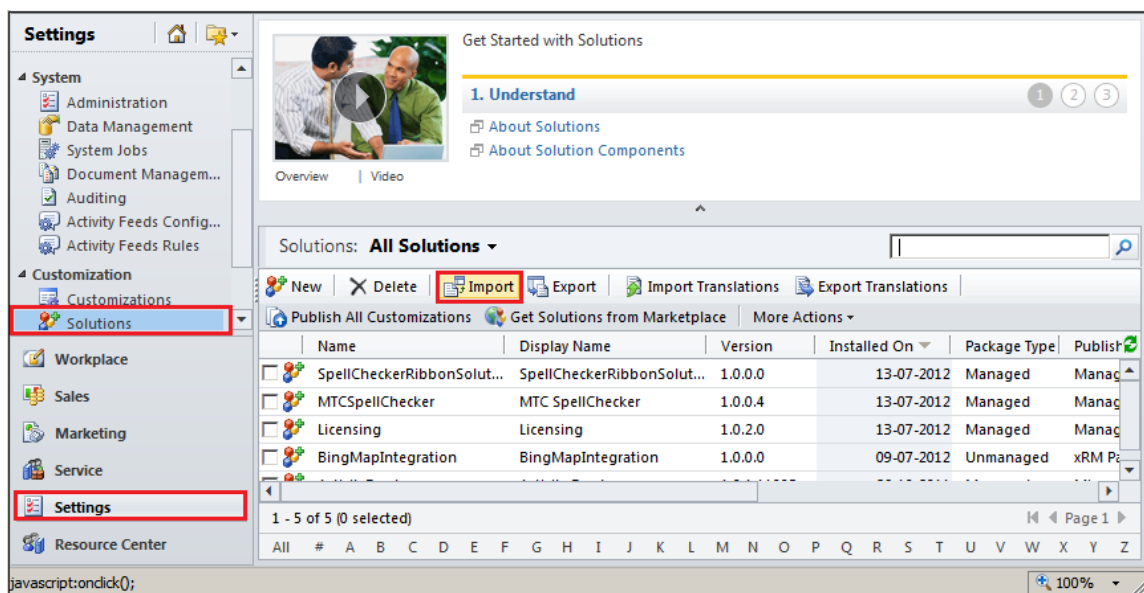


Figure 3 : Import Solution

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

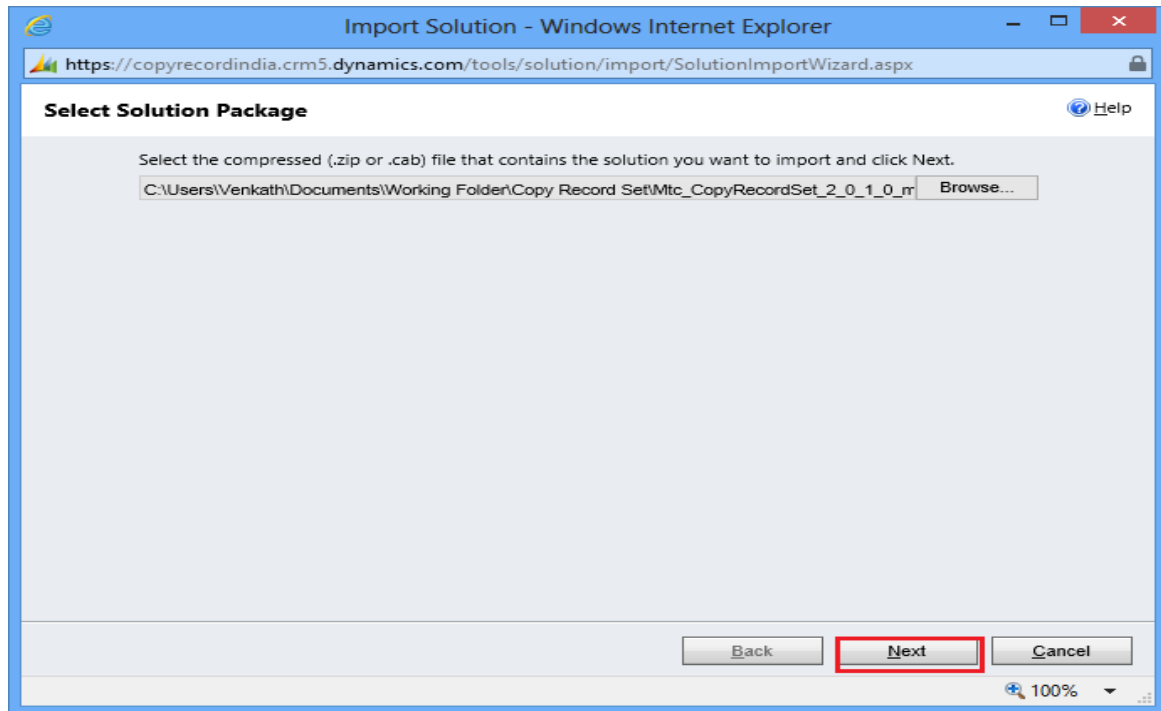


Figure 4 : Select Solution Package

- Click on **Next** after selecting the Copy Record Set Managed Solution

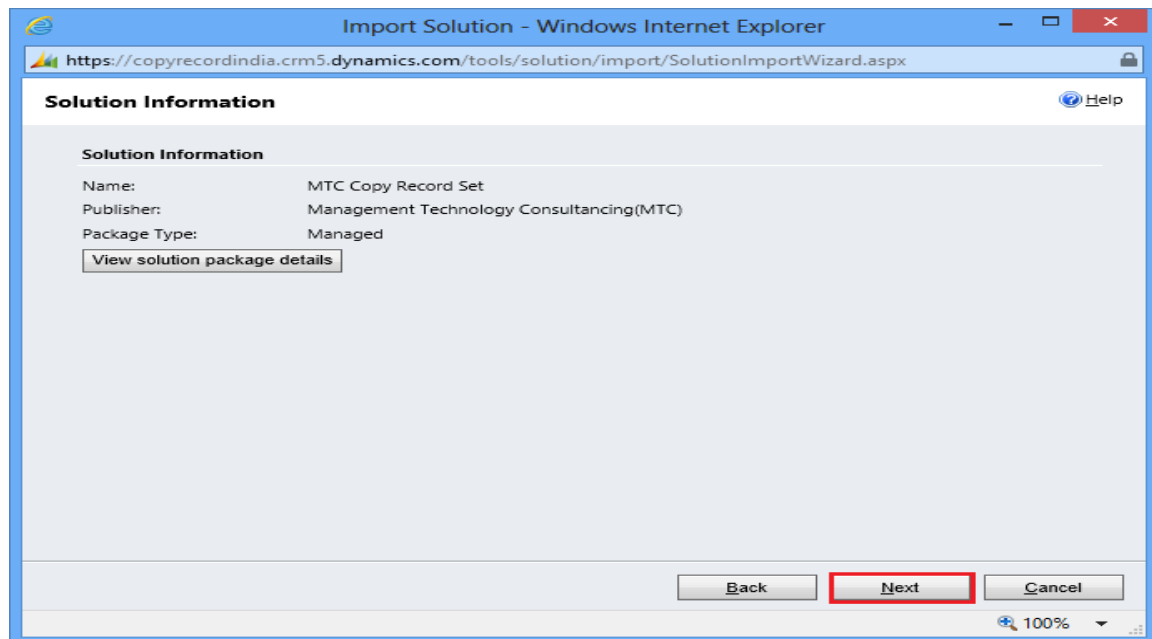


Figure 5 : Importing Options window

- Click on Next to Proceed
- Check the box to Activate the Process
- Click on Next to Proceed

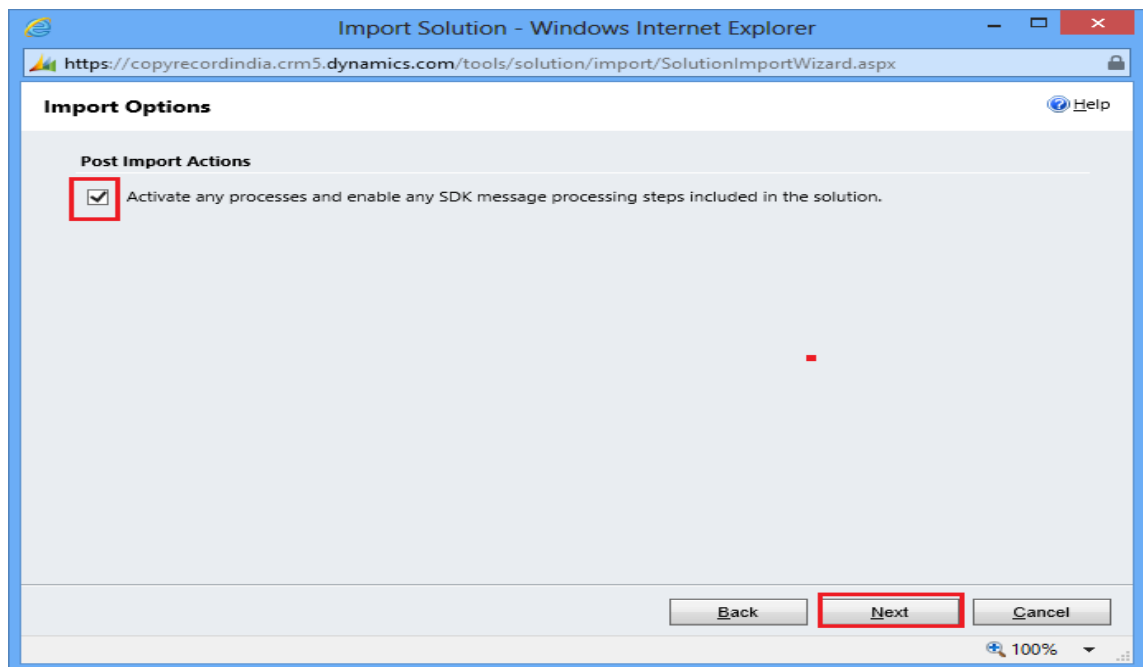


Figure 6: Import Solution

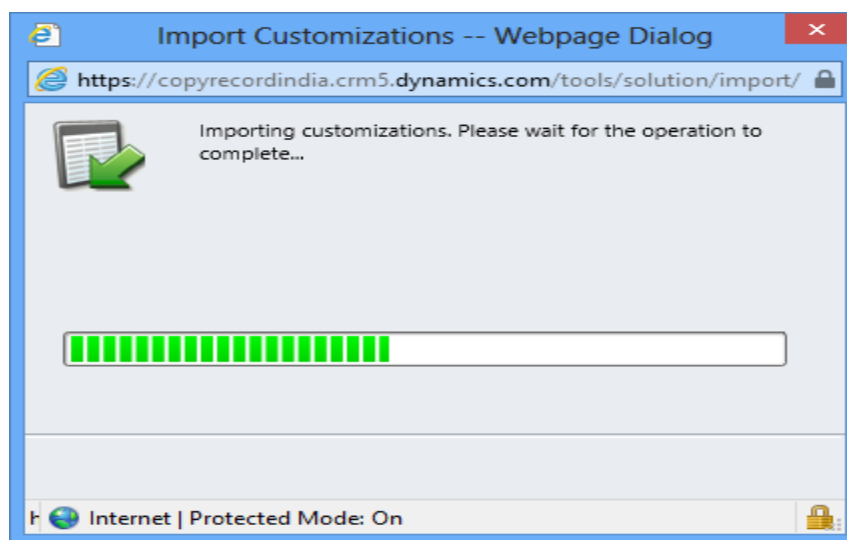


Figure 7 : Solution importing

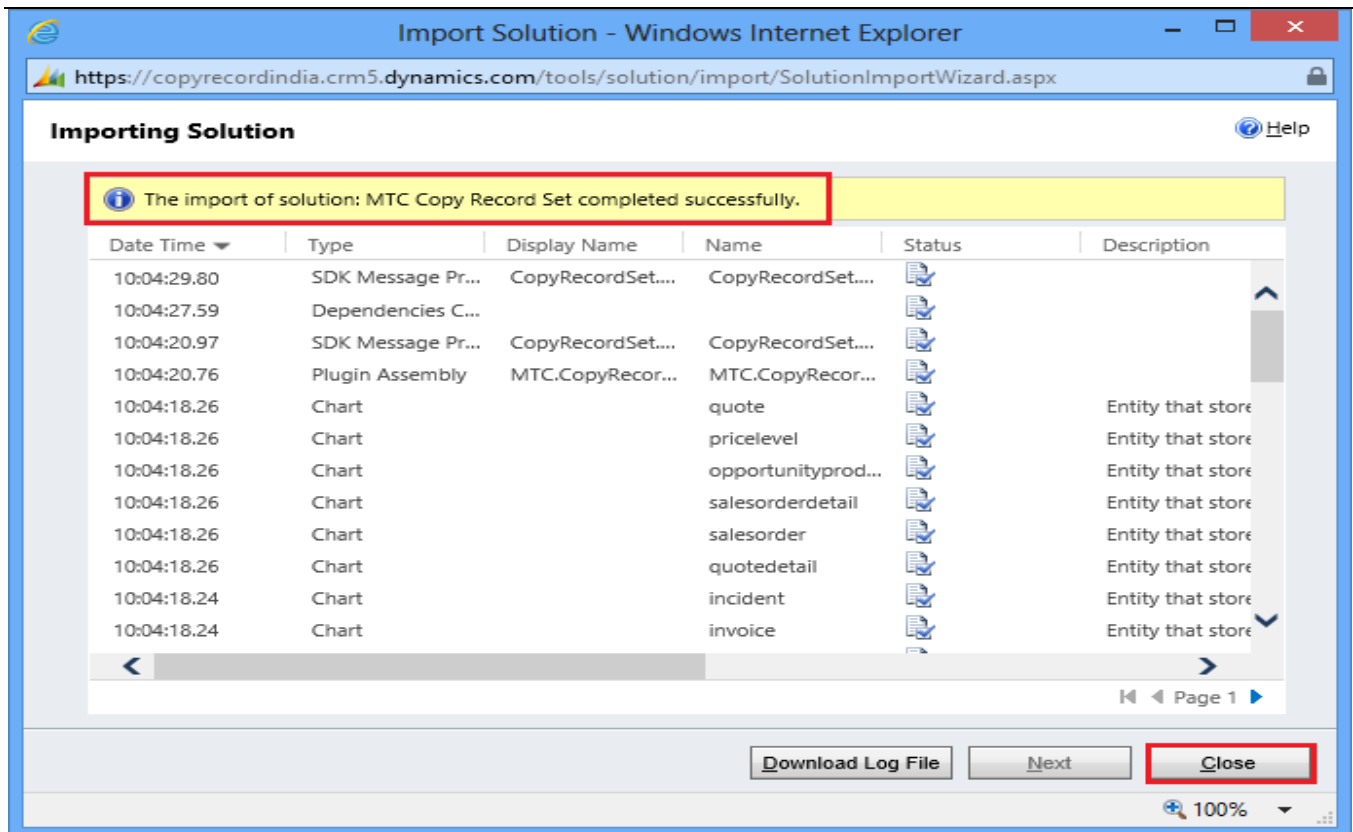


Figure 8: Solution successfully imported

- Click on Close Tab to Finish Successful installation of Managed Solution in to CRM

License Key Installation

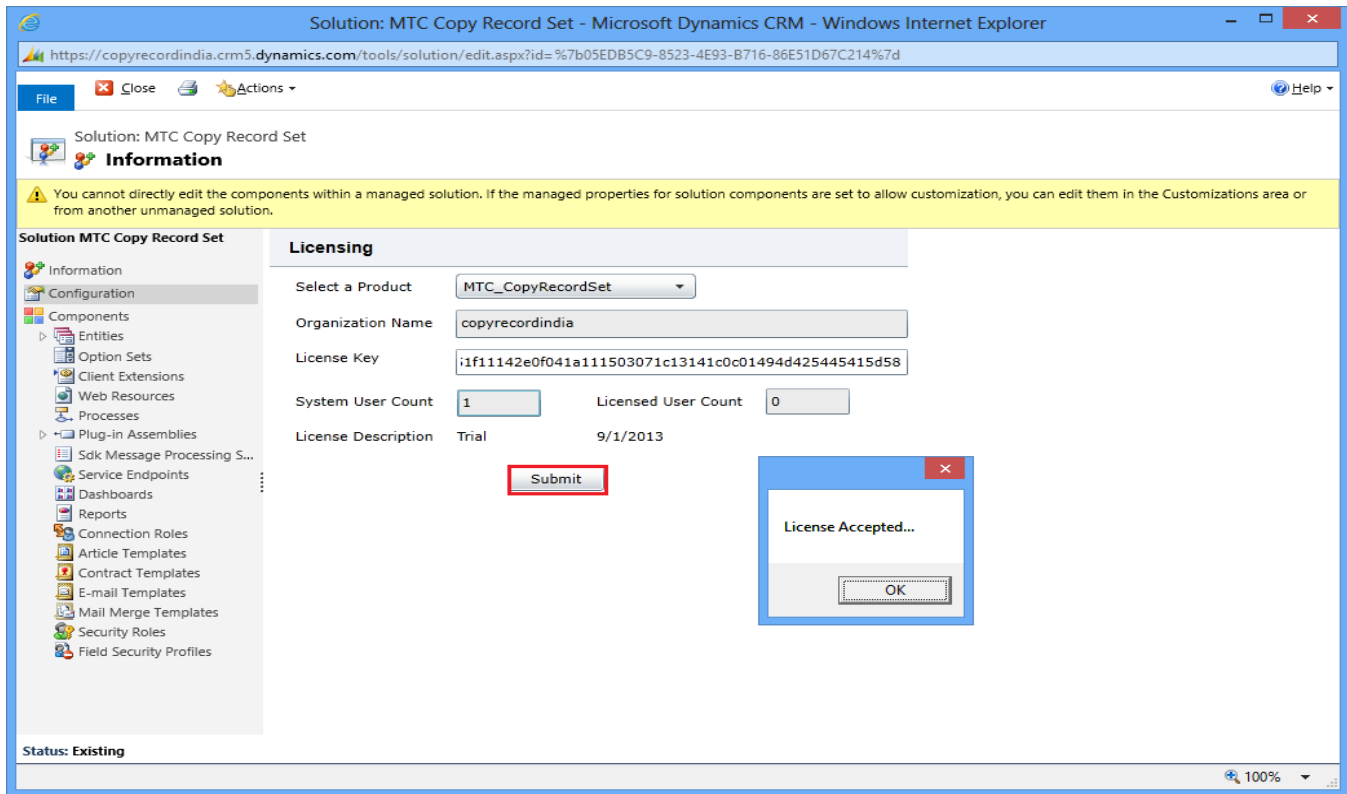


Figure 9 : Licensing window

- After importing the Copy Record Set Solution you need to place the License key navigate to **settings** → **solution** → Click on **Copy Record Set Managed** to open a new window as shown above
- Select the product as **MTC_CopyRecordSet** from the **Dropdown list**
- Enter the License key which you have received after placing the request and click on submit then a pop up window appears and displays the message **License Accepted**. Click on **OK**.

NOTE: Send the Organization Name of your CRM to salesteam@mtccrm.com .
After placing the request you will receive the **LICENSE KEY** within 24 hrs.

Security Role Privileges

Security Roles are a standard function of Microsoft Dynamics CRM and Copy Record Set is compliant to the privileges controlled by Security Roles. Your User's access privileges to add or "Create" records and modify or "Write" records from Copy Record Set can be controlled by the Security Role functionality explained briefly here and in CRM guides and "Help".

Adding Security roles at User level

You can set user level Security Roles privileges, Navigate to **Settings** → **Administration** → **Users** as shown below

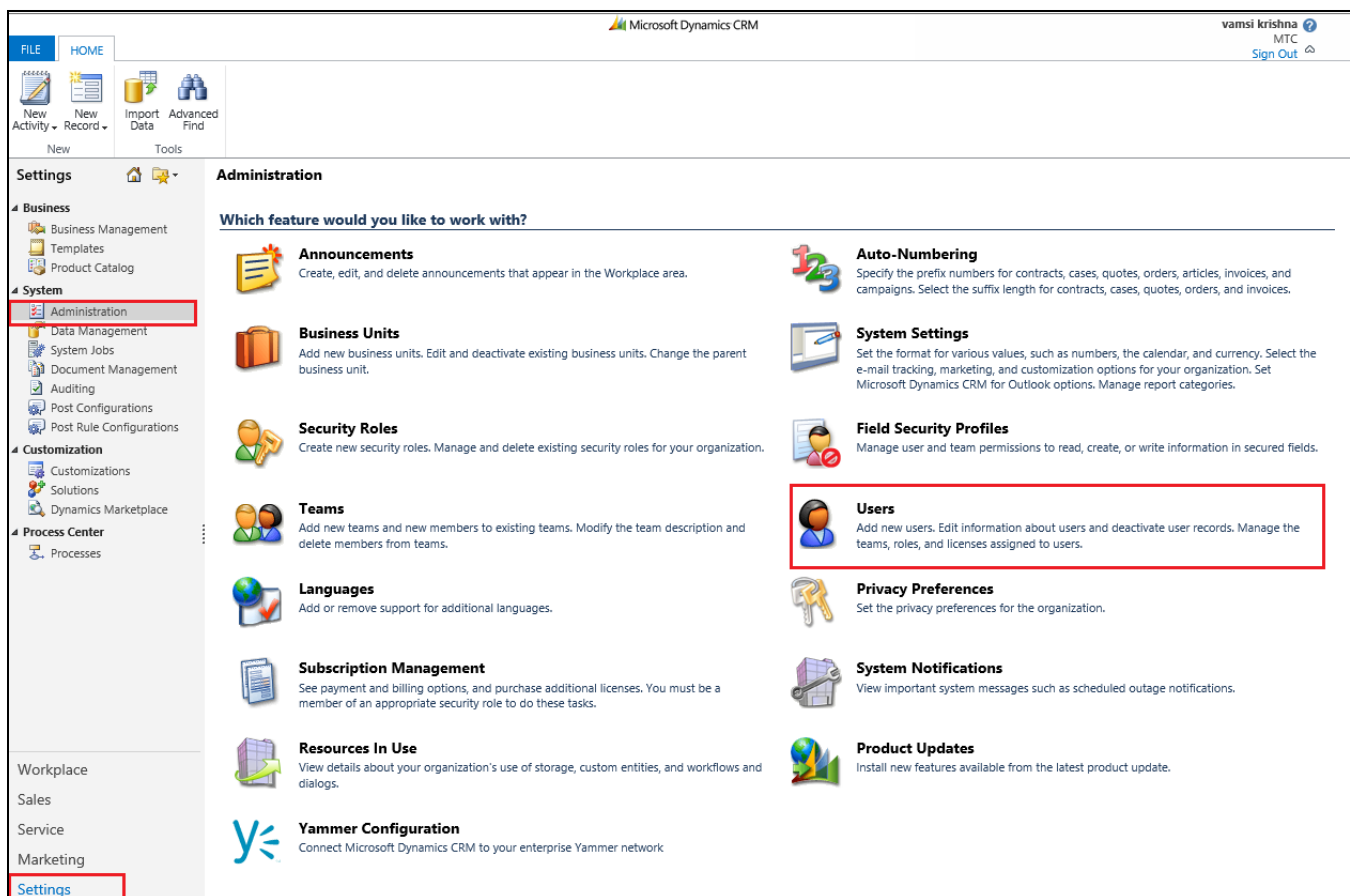


Figure 10 : User Level Settings

- It opens a new window with a list of **Enabled Users** as shown in Figure.
- Select the check box of user name to make a modification, which opens a new window, click on **Manage Roles** in the ribbon as shown (To Create a new User click on New Icon on the top left corner and follow the procedure as it comes on screen).

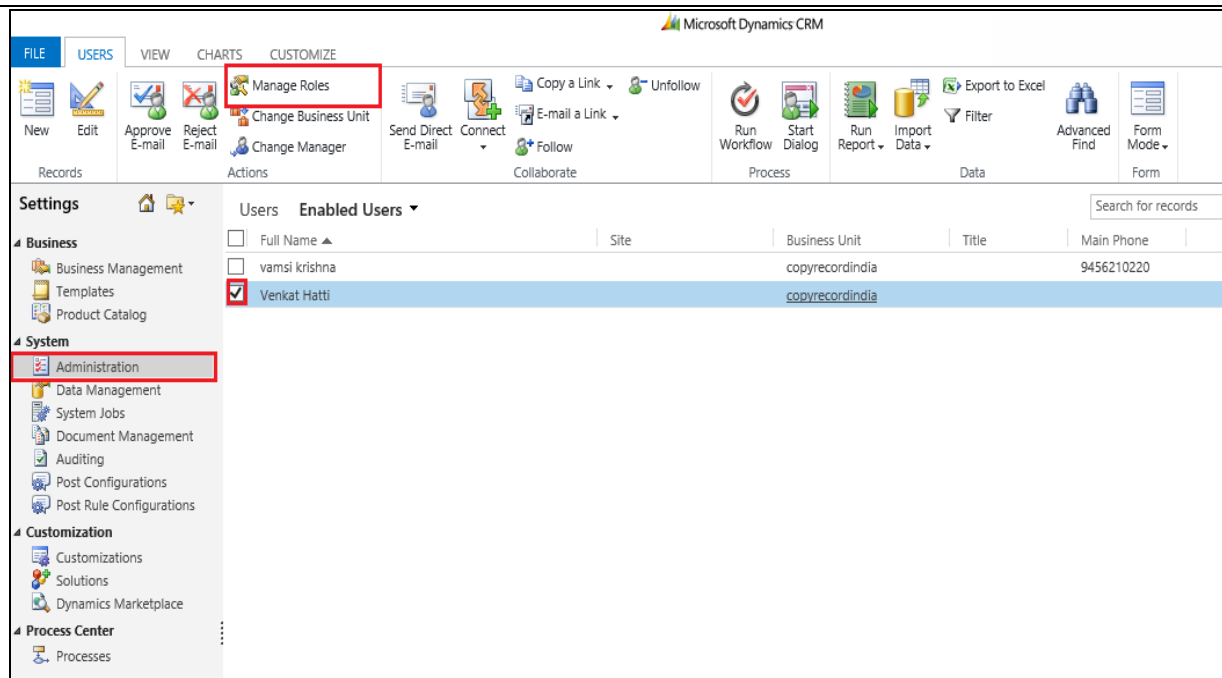


Figure 11 : Manage Roles

- A new window will open as shown.
- Select the role as “MTC License” and click on “OK” to assign the role to the user.

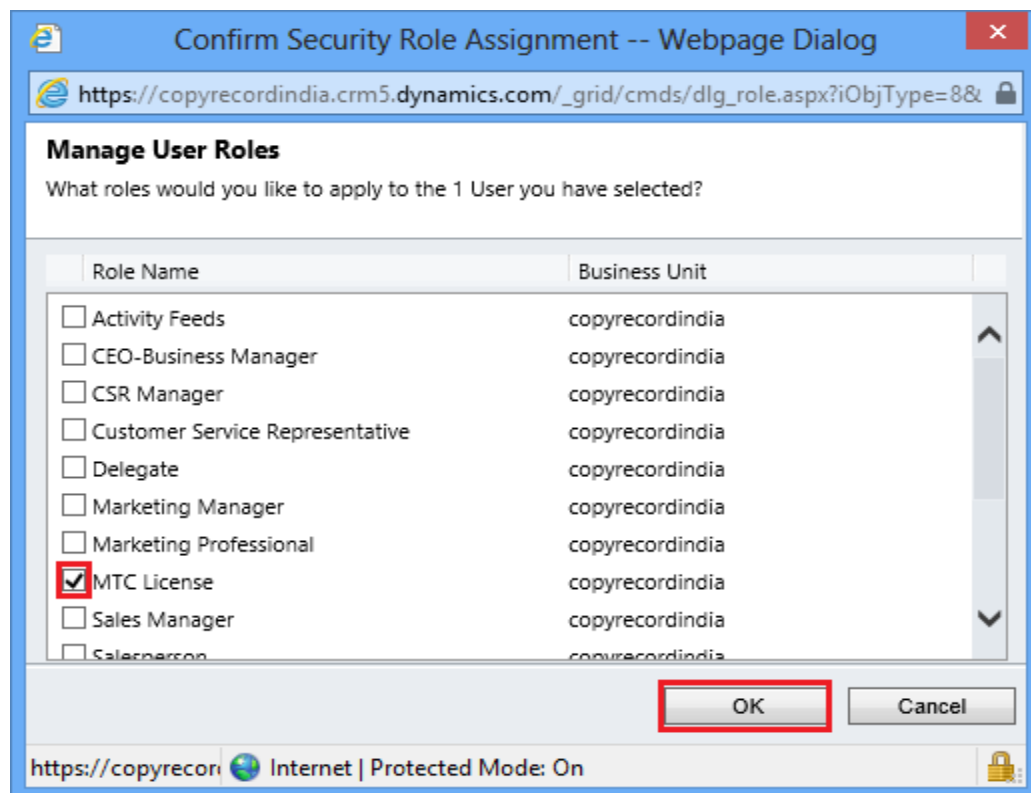


Figure 12 : Manage User Roles

Copy Record Set for Account, Lead and Contact only

Though the Copy Record Set product works for all entities, but relationships can be preset for only three entities like Account, Lead and Contact. The relationship may be **1:N** or **N:N**. unless these settings are made in the CRM your end result may not be as desired by you. Details of the Relationship links are shown below

Example

Here we will show you how does relationship works with Email task for an Account Entity

- Click on Advance Find button which is on the Top Ribbon to get a pop up screen.

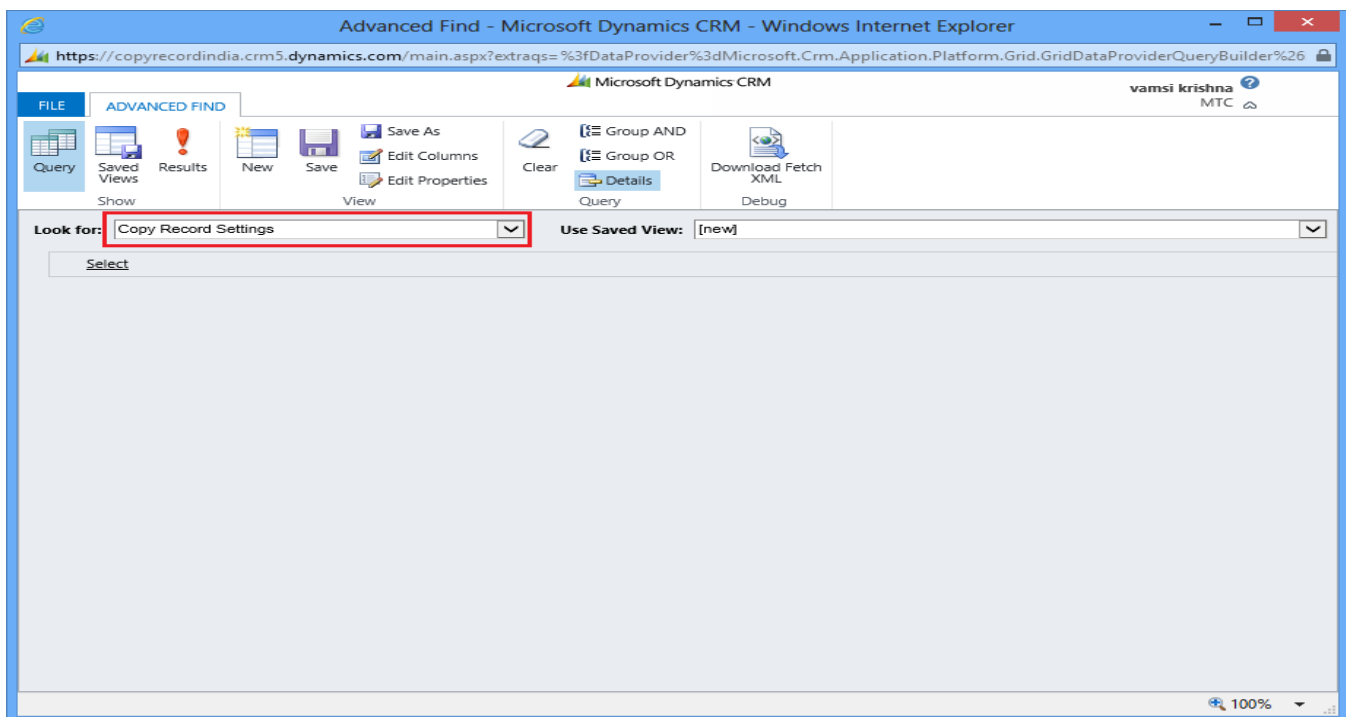


Figure 13: Advance Find pop up Screen

- Select **"Copy Record Settings"** from the Dropdown list provided
- Click on Results Tab on the Ribbon to get results
- Click on **"New Copy Record Setting"** Tab on the Top Left corner of the ribbon

As mentioned always you will have two options 1:N or N:N relations

Example for 1:N relationship

The screenshot shows the 'Copy Record Settings' form in Microsoft Dynamics CRM. The form is titled 'Copy Record Settings New' and is in the 'General' tab. The left sidebar shows the 'Information' section with 'General' and 'Notes' tabs, and the 'Related' section with 'Common' and 'Processes' categories. The 'Common' category includes 'Activities', 'Closed Activities', 'Connections', and 'Audit History'. The 'Processes' category includes 'Workflows' and 'Dialog Sessions'. The main form area contains the following fields:

- Name ***: New Name CRS
- Primary Entity ***: account
- Related Entity ***: email
- Relationship Type ***: 1:N (selected from a dropdown)
- Relation Ship Name ***: Account_Emails
- Lookup Logical Name ***: regardingobjectid

The top ribbon shows the 'FILE' tab with 'COPY RECORD SETTINGS' and 'ADD' buttons. The 'ADD' button is highlighted. The ribbon also includes 'CUSTOMIZE' and 'Share' buttons. The 'Share' button is highlighted. The ribbon also includes 'Follow', 'Unfollow', 'Run Workflow', 'Start Dialog', and 'Run Report' buttons. The ribbon also includes 'Connect', 'Copy a Link', 'E-mail a Link', 'Collaborate', 'Process', and 'Data' buttons. The ribbon also includes 'Save', 'Save & Close', and 'Delete' buttons. The ribbon also includes 'Save' and 'Save & Close' buttons. The ribbon also includes 'Save' and 'Save & Close' buttons.

Figure 14: New Copy Record Setting

- Input Name of your choice
- Input Primary Entity (In this case it will be Account Logical name only)
- Input Related Entity (In this case it will be email logical names only)
- Select Relationship type from the Drop down list (1: N or N:N)

Both the Relationship Name and Lookup logical name should be the same which is in Relationship details of Account to Email as shown below

- Select Name from Relationship Definition and Name from Lookup field and place them in the right
- Click on Save and Close to quit this operation.

Relationship: Account to E-mail - Windows Internet Explorer

https://copyrecordindia.crm5.dynamics.com/tools/systemcustomization/relationships/manageRelationship.aspx?appSolutionId=%7bFD140AAI

File Save and Close Show Dependencies Managed Properties Help

Relationship **Account to E-mail** Working on solution: Default Solution

Common Information

General

Relationship Definition

Primary Entity * Account Related Entity * E-mail

Name * Account_Emails

Lookup Field

Display Name * Regarding Name * regardingobjectid

Requirement Level * No Constraint

Description Unique identifier of the object with which the e-mail is associated.

Navigation Pane Item for Primary Entity

Display Option * Do not Display Custom Label *

Display Area * Details Display Order * 0

Relationship Behavior

Type of Behavior * Parental

Assign * Cascade All Reparent * Cascade All

Share * Cascade All Delete * Cascade All

Unshare * Cascade All Merge * Cascade All

100%

Figure 15: Relationship Details

Example for N:N relationship

- Go to Relationship form

The screenshot shows the 'Relationship' form in Microsoft Dynamics CRM. The title bar indicates 'Working on solution: Default Solution'. The left sidebar shows the 'Common' group with 'Information' selected. The main area is titled 'Relationship Account to Invoice' and has a 'General' tab selected. The form contains the following fields:

- Current Entity:**
 - Entity Name *: Account
 - Display Option *: Do not Display
 - Display Area *: Details
- Other Entity:**
 - Entity Name *: Invoice
 - Display Option *: Do not Display
 - Display Area *: Details
- Relationship Definition:**
 - Name *: new_account_invoice
 - Relationship Entity Name *: new_account_invoice (highlighted with a red box)

Figure 16: Relationship Details

- Get the Relationship Entity Name from the form and place it in Relationship name as shown

The screenshot shows the 'Copy Record Settings' form in Microsoft Dynamics CRM. The title bar indicates 'Microsoft Dynamics CRM' and the user 'vamsi.krishna MTC'. The left sidebar shows the 'Information' group with 'General' selected. The main area is titled 'Copy Record Settings New' and has a 'General' tab selected. The form contains the following fields:

- Name *: New NtoN relation**
- Primary Entity *: account**
- Related Entity *: invoice**
- Relationship Type *: N:N**
- Relation Ship Name *: new_account_invoice (highlighted with a red box)**

Figure 17: New Copy Record Setting

- Click on Save and Close to quit

Copy Record Set for Other entities

The Other entities are Invoice, Order, Quote, Case, Opportunity, Price list along with all their products such as Quote product, Invoice product etc.

After setting up the relationship for Account, Contact or Lead the functionality of the Copy record set remains the same for all as shown below.

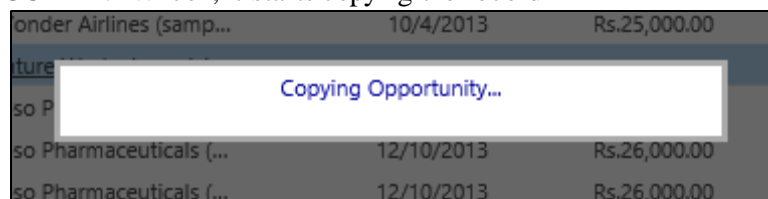
Open **CRM->Sales->Opportunity** select any of the Record as shown (New Opportunity for Test) **and** click on the **COPY NEW** icon on the ribbon

The screenshot displays the Microsoft Dynamics CRM interface. The top ribbon shows the 'COPY NEW' icon highlighted with a red box. The left navigation pane shows 'Opportunities' selected, also highlighted with a red box. The bottom workspace area shows 'Sales' selected, highlighted with a red box. The main table lists various opportunities, with 'New Opportunity for Test' selected.

Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating	E-mail (Potential Cust)
6 orders of Product SKU JJ202 (sample)	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot	
6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot	
6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot	
6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot	
6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot	
6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot	
6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot	
Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	10/4/2013	Rs.25,000.00		Hot	
Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	10/4/2013	Rs.25,000.00		Hot	
Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	10/4/2013	Rs.25,000.00		Hot	
Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	10/4/2013	Rs.25,000.00		Hot	
<input checked="" type="checkbox"/> New Opportunity for Test	Adventure Works (sample)...				Warm	
They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	12/10/2013	Rs.26,000.00	95	Hot	
They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	12/10/2013	Rs.26,000.00	95	Hot	
They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	12/10/2013	Rs.26,000.00	95	Hot	
They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	12/10/2013	Rs.26,000.00	95	Hot	
Very likely will order 18 Product SKU JJ202 this year (sam...	Alpine Ski House (sample)	11/7/2013	Rs.30,000.00		Hot	
Very likely will order 18 Product SKU JJ202 this year (sam...	Alpine Ski House (sample)	11/7/2013	Rs.30,000.00		Hot	
Very likely will order 18 Product SKU JJ202 this year (sam...	Alpine Ski House (sample)	11/7/2013	Rs.30,000.00		Hot	
Very likely will order 18 Product SKU JJ202 this year (sam...	Alpine Ski House (sample)	11/7/2013	Rs.30,000.00		Hot	
Will be ordering about 110 items of all types (sample)	Coho Winery (sample)	1/8/2014	Rs.25,000.00	80	Hot	
Will be ordering about 110 items of all types (sample)_Co...	Coho Winery (sample)	1/8/2014	Rs.25,000.00	80	Hot	
Will be ordering about 110 items of all types (sample)_Co...	Coho Winery (sample)	1/8/2014	Rs.25,000.00	80	Hot	
Will be ordering about 110 items of all types (sample)_Co...	Coho Winery (sample)	1/8/2014	Rs.25,000.00	80	Hot	

Figure 18: CRM screen showing Opportunities

- On click of the COPY NEW icon, it starts copying the record



- After copying is completed you can see in the same screen a new record is created as New Opportunity for Test_Copy is created.

Microsoft Dynamics CRM

FILE OPPORTUNITIES VIEW CHARTS ADD CUSTOMIZE

Records Actions Collaborate Process Data

Sales Customers Sales Leads Opportunities Competitors Collateral Quotes Orders Invoices Products Sales Literature Marketing Marketing Lists Quick Campaigns Goals Goals Goal Metrics Rollup Queries Workplace Sales Service Marketing Settings

Opportunities My Open Opportunities

Search for records

Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating
<input type="checkbox"/> 6 orders of Product SKU JJ202 (sample)	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot
<input type="checkbox"/> 6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot
<input type="checkbox"/> 6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot
<input type="checkbox"/> 6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot
<input type="checkbox"/> 6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot
<input type="checkbox"/> 6 orders of Product SKU JJ202 (sample)_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot
<input type="checkbox"/> 6 orders of Product SKU JJ202 (sample)_Copy_Copy	Fabrikam, Inc. (sample)	8/7/2013	Rs.10,000.00	90	Hot
<input type="checkbox"/> Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	10/4/2013	Rs.25,000.00		Hot
<input type="checkbox"/> Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	10/4/2013	Rs.25,000.00		Hot
<input type="checkbox"/> Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	10/4/2013	Rs.25,000.00		Hot
<input type="checkbox"/> Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	10/4/2013	Rs.25,000.00		Hot
<input checked="" type="checkbox"/> New Opportunity for Test	Adventure Works (sample)...				Warm
<input checked="" type="checkbox"/> New Opportunity for Test_Copy	Adventure Works (sample)...				Warm
<input type="checkbox"/> They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	12/10/2013	Rs.26,000.00	95	Hot
<input type="checkbox"/> They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	12/10/2013	Rs.26,000.00	95	Hot
<input type="checkbox"/> They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	12/10/2013	Rs.26,000.00	95	Hot
<input type="checkbox"/> They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	12/10/2013	Rs.26,000.00	95	Hot
<input type="checkbox"/> Very likely will order 18 Product SKU JJ202 this year (sam...	Alpine Ski House (sample)	11/7/2013	Rs.30,000.00		Hot
<input type="checkbox"/> Very likely will order 18 Product SKU JJ202 this year (sam...	Alpine Ski House (sample)	11/7/2013	Rs.30,000.00		Hot
<input type="checkbox"/> Very likely will order 18 Product SKU JJ202 this year (sam...	Alpine Ski House (sample)	11/7/2013	Rs.30,000.00		Hot
<input type="checkbox"/> Will be ordering about 110 items of all types (sample)	Coho Winery (sample)	1/8/2014	Rs.25,000.00	80	Hot
<input type="checkbox"/> Will be ordering about 110 items of all types (sample)_Co...	Coho Winery (sample)	1/8/2014	Rs.25,000.00	80	Hot
<input type="checkbox"/> Will be ordering about 110 items of all types (sample)_Co...	Coho Winery (sample)	1/8/2014	Rs.25,000.00	80	Hot
<input type="checkbox"/> Will be ordering about 110 items of all types (sample)_Co...	Coho Winery (sample)	1/8/2014	Rs.25,000.00	80	Hot

1 - 24 of 24 (2 selected)

Figure 19: CRM showing new created record

Once the record is duplicated or copied the created record will have the following

Copy Record Set Functionality

No	Entity Name	Description
1	Account	Copying Account, and its Notes and its Relationships
2	Contact	Copying Contact ,and its Notes and its Relationships
3	Lead	Copying Lead, and its Notes and its Relationships
4	Invoice	Copying Invoice and its Products, and its Notes
5	Order	Copying Order and its Products, and its Notes
6	Quote	Copying Quote and its Products, and its Notes
7	Case	Copying case and its Notes and its Activities
8	Opportunity	Copying Opportunities and its Products, and its Notes
9	Quote Product	Copying only Quote Product
10	Order Product	Copying only Order Product
11	Invoice Product	Copying only Invoice
12	Opportunity Product	Copying only Opportunity Product
13	Price List	Copying only Price list

Uninstallation Process

- To uninstall Copy Record Set Navigation is **Settings** → **Solutions** → Select the check box of **MTC_CopyrecordSet** then click on **Delete** as shown below.

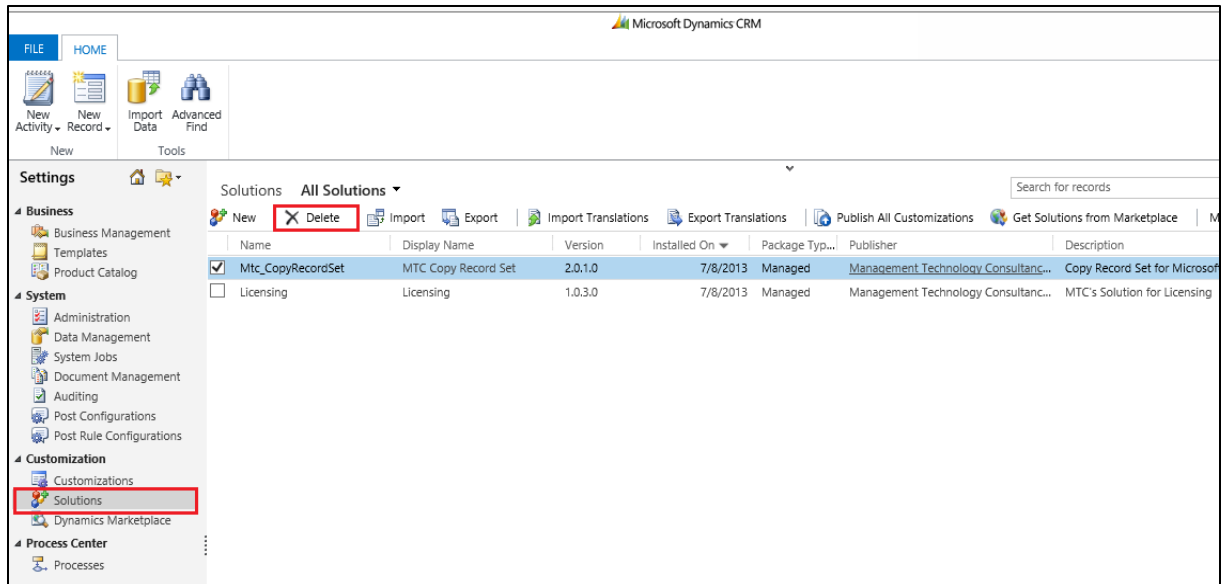


Figure 20 : Deleting Copy Record Set Solution

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

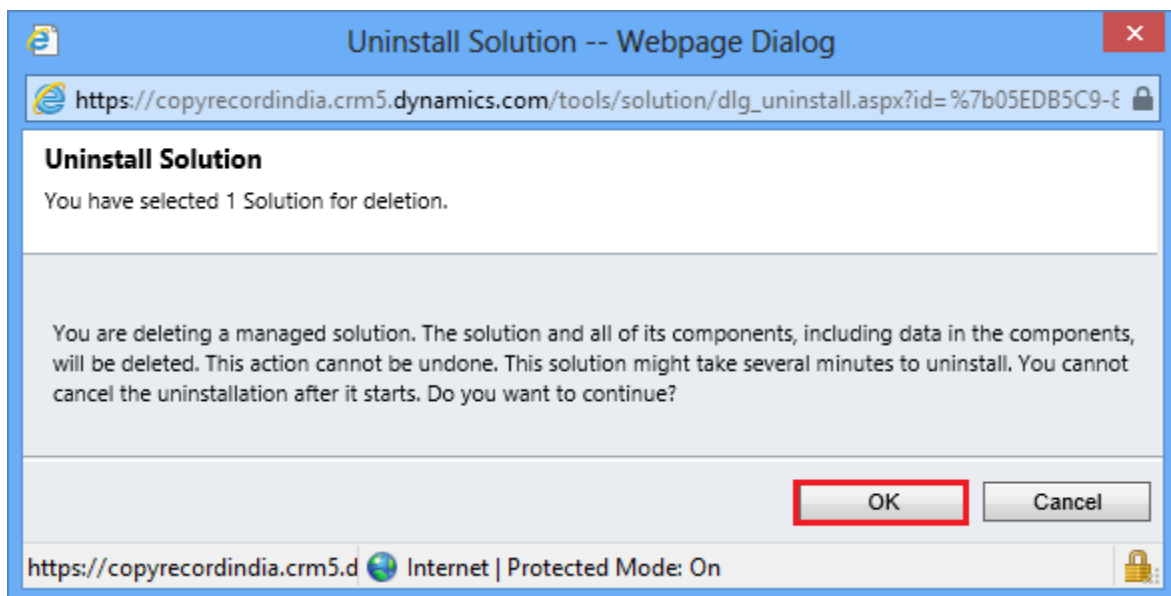


Figure 21 : Uninstall Solution

- Follow the above process to delete the Licensing solution

MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Microsoft Dynamics CRM platform. MTC supports a product development effort with a highly efficient global Microsoft CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Microsoft Dynamics 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 CRM platform technologies. Starting with the Microsoft 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 Microsoft Dynamics CRM platform and CRM portal technologies in the business of delivering add-on products and services.



web

MTC is a Microsoft Independent Solution Vender working on Microsoft CRM since the introduction of the platform. MTC's product offerings include development technologies for the Dynamics CRM platform, add-on enhancements of and major functions to CRM, as well as vertical-market Enterprise versions of CRM serving an every growing list of industries and organization types.



features
complete
Dynamics

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 Microsoft Dynamics 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 Microsoft Dynamics CRM platform with unique and innovative social networking and knowledge resource allocation processes.

Dynamics Exchange is the leading community free and open to Microsoft CRM uses and professionals for support, training, knowledge, products, and services worldwide.

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F. Customer Care details

MTC is always open to global community of Microsoft Dynamics 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

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