

Dynamics 365 / CRM / XRM Platform



Multi-File Uploader

User Guide



Microsoft Dynamics™ CRM

CRM Versions Supported: 2015/2016/D 365

Multi-File Uploader is a handy Dynamics 365 / CRM add-on specifically built to allow CRM users and administrators to upload/download multiple files (word, excel, pdf, WinRAR, etc.) to various entities (e.g. accounts, contacts, etc.) which is otherwise not possible through simple CRM functionality.

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Product Overview

MTC has developed yet another innovative Dynamics 365 / CRM add-on named Multi-File Uploader. The main purpose of Multi-File Uploader is to allow CRM users and administrators to upload/download multiple files (word, excel, pdf, WinRAR, etc.) to various entities (e.g. accounts, contacts, etc.) which is otherwise not possible through simple CRM functionality. As a result, CRM users and administrators are largely benefitted as they can now upload/download all important files at one go saving time and energy while enhancing the productivity.

How does it benefit your Organization?

- Upload/Download multiple files at one go and become more productive.
- Applicable on all entities giving you the freedom of choice.
- All major file types are supported.
- Quick to configure and easy to use.
- Save time and energy which can be used elsewhere for different priorities.

Installation

To install Multi-File Uploader 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. An Import Customizations window appears with the message “Importing customizations. Please wait for the operation to complete...”
9. Once Import Customizations is done, import solution success message appears. Click on “Close” to exit the process.

Importing Multi-File Uploader Solution

1. Open CRM and go to **Settings→Solutions→Import**.
2. Click on **Import** to upload the Multi-File Uploader solution.

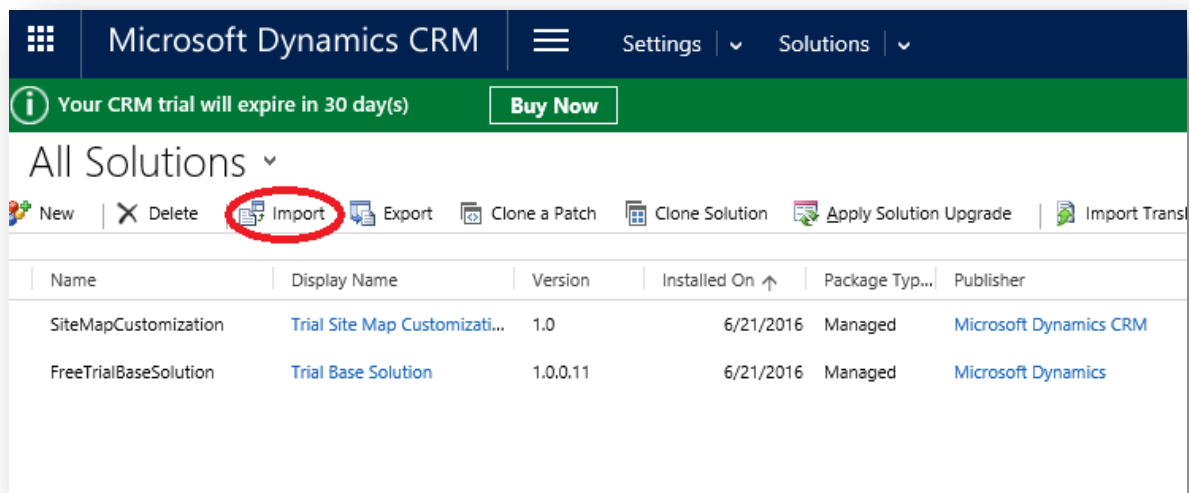


Figure 1: Import Button

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.

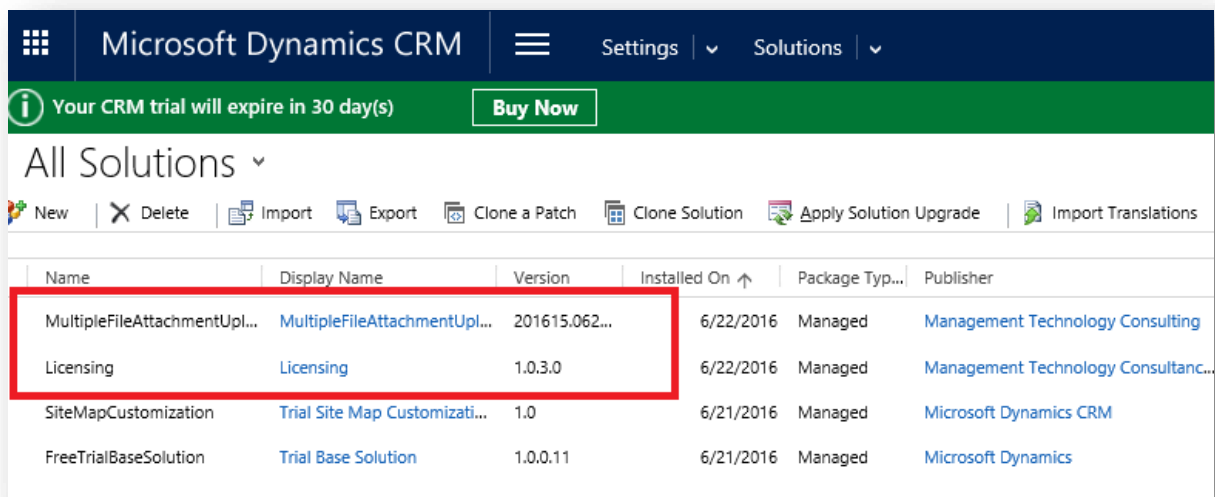


Figure 2: Solution Imported to CRM

License Key

License key is very important to run the Multi-File Uploader solution. You can procure license key in two ways as listed below.

1. License Key Generator

Use the license key generator for Multi-File Uploader on the MTC website XXX as shown below.

2. Email Sales Help

- Request license key from MTC's Sales Team via email by clicking on "Email Sales Help" as shown below.
- An automatic email to MTC's sales team with pre-defined subject and body will pop-up. All you need to do is input your Organization Unique Name and Product Name, and send the email.

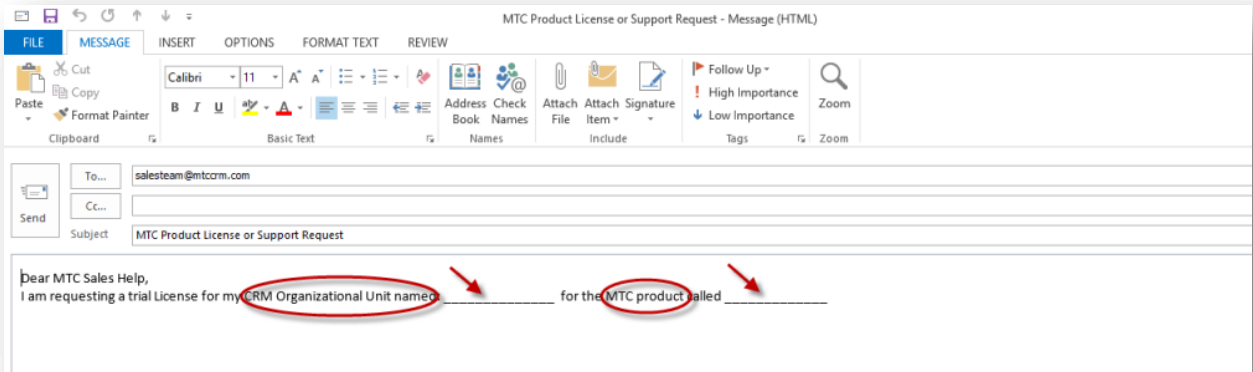


Figure 3: License Key Request via Email

Note: Alternatively, you can drop an email to salesteam@mtccrm.com requesting the license key with Organization Unique Name mentioned.

How to find out your Organization Unique Name?

- Go to **Settings** → **Customization** → **Click on Developer Resources** on your active CRM.



Figure 4: Developer Resources

- From the **Developer Resources window** copy the Organization Unique Name and send it to the MTC's Sales Team to get the license key.

After receiving your license key request, MTC will process it within 24 hours (maximum) and send you the license key.

Activating the License Key

Use the license key that you got from MTC to activate the solution. Follow the below steps.

1. Go to Settings → **Solution** → **Configuration** → **Click on LICENSING**.
2. Select the Product from the Drop down list as “Multi-File Uploader.”
3. Organization name will be automatically displayed.
4. Enter the LICENSE KEY.
5. Click on Submit button.

A pop up window appears and displays the message **License Accepted**. Click **OK**.

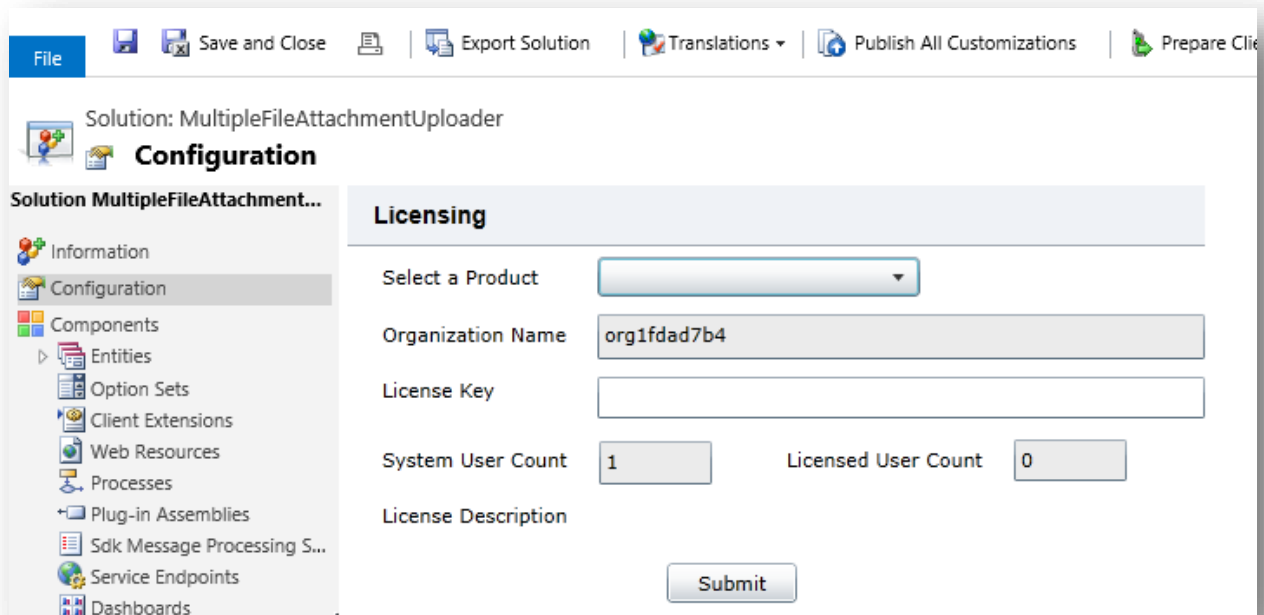


Figure 5: Activating License Key

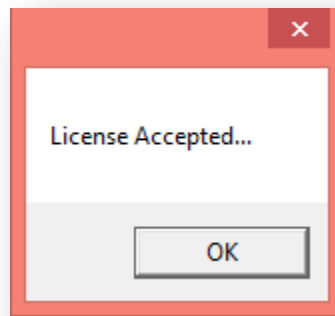


Figure 6: License Accepted

Dynamics 365 Solution - Trial License Activation/ Product License Purchase/ Additional User License Purchase

Please refer the below link for Trial License Activation and/or Product License Purchase and/or Additional User License Purchase for MTC's Dynamics 365 Solution.

<https://www.mtccrm.com/PLI>

In case of queries or issues, please write down to salesteam@mtccrm.com for quick help.

Applying Multi-File Uploader on Entities

For using Multi-File Uploader functionality on entities, you need to follow the below steps.

1. Go to **Settings→Solutions→Double Click on Multi-File Uploader**.
2. Multi-File Uploader Configuration Page shows up. Click on Multi-File Uploader Settings
3. From the Multi-File Uploader Settings window add Available Entities to Selected Entities using >> button. You can also remove Select Entities using << button.

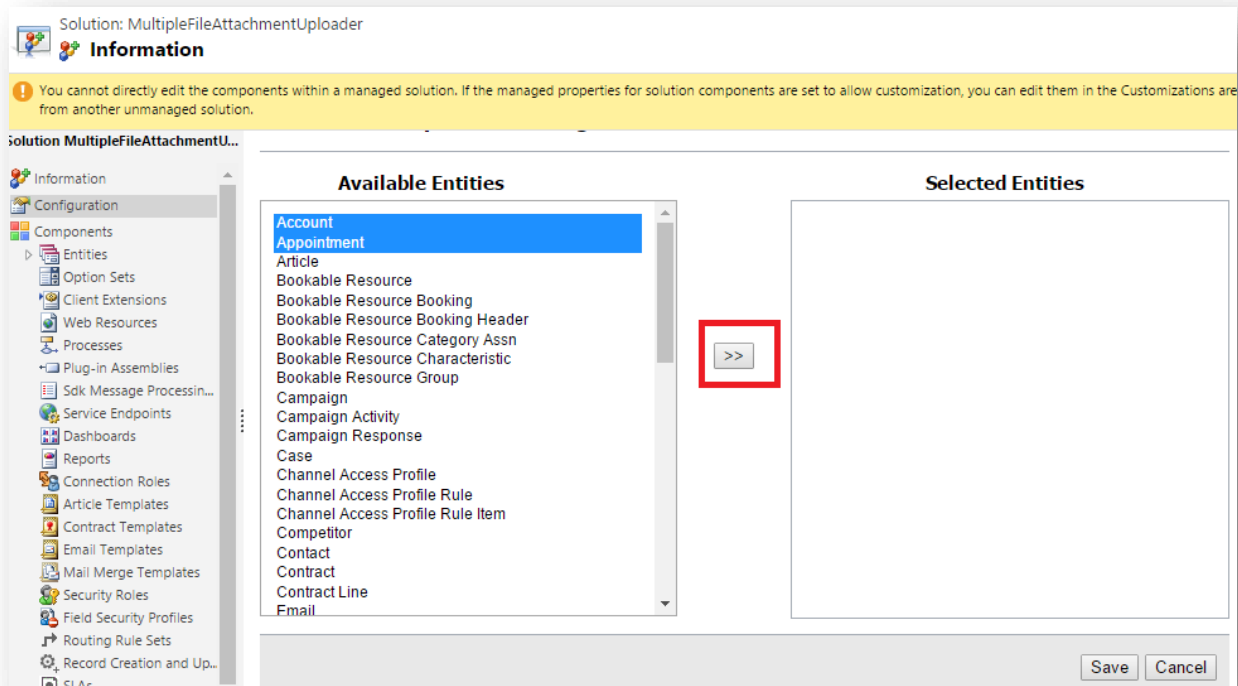


Figure 7: Select Entities from Available Entities

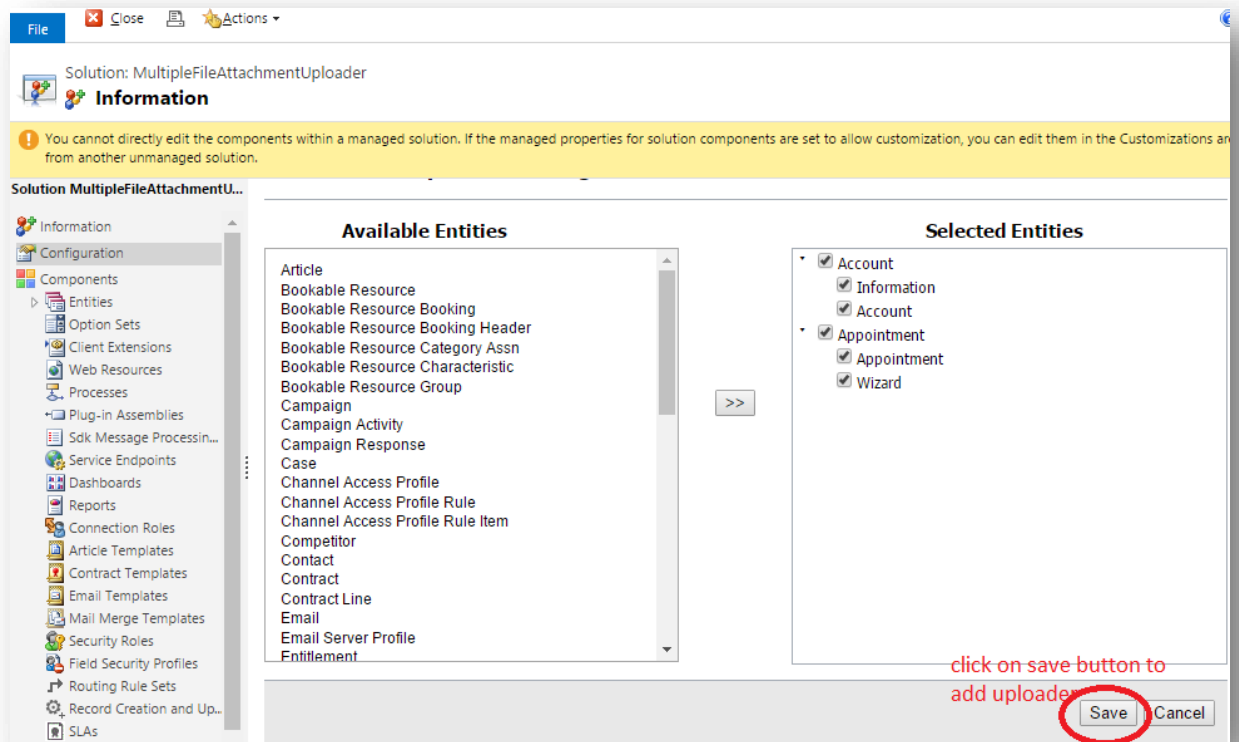


Figure 8: Click on Save

4. Entities selected and added from Available Entities will disappear and appear in Selected Entities and vice versa.
5. In the Selected Entities, all the main forms associated with entities also show up so that you can select whichever you want for applying Multi-File Uploader solution.
6. Finally click **Save** to apply the changes.

Note: The above steps are mandatory if you want to use Multi-File Uploader on any given entity.

Multi-File Uploader Functionality

Multi-File Uploader can be very handy to either upload or download multiple files at one go with the CRM entities which is otherwise not possible with normal CRM functionality.

Uploading Multiple Files

In order to upload multiple files to a given entity, you need to follow the below steps. (For your understanding, let's use Multi-File Uploader on Account entity)

1. Use "Advance Find" button and search for Accounts in your CRM.

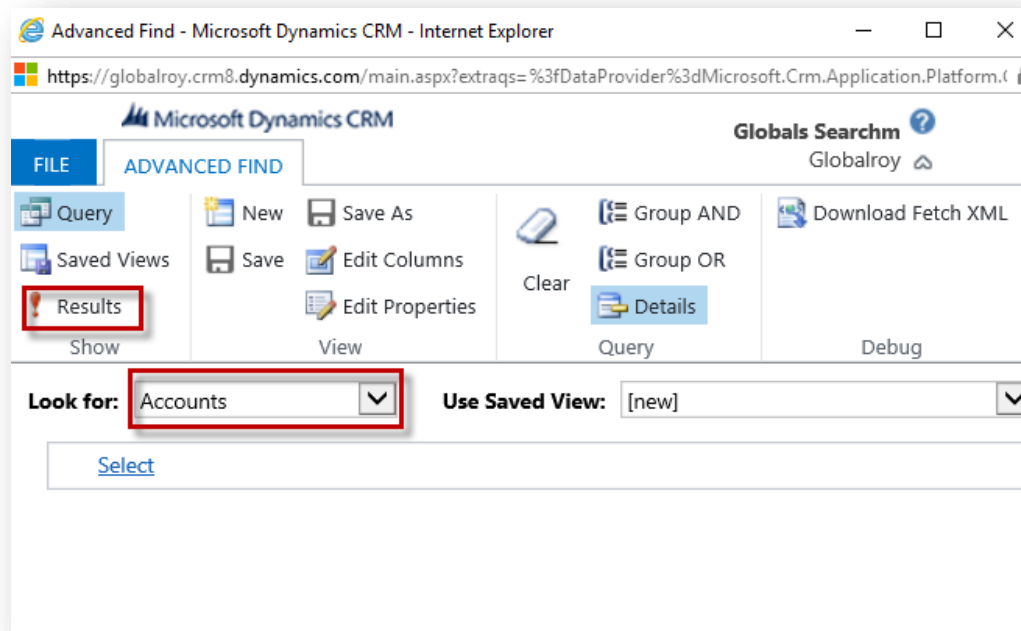


Figure 9: Accounts Search

2. Select and open any listed Account.

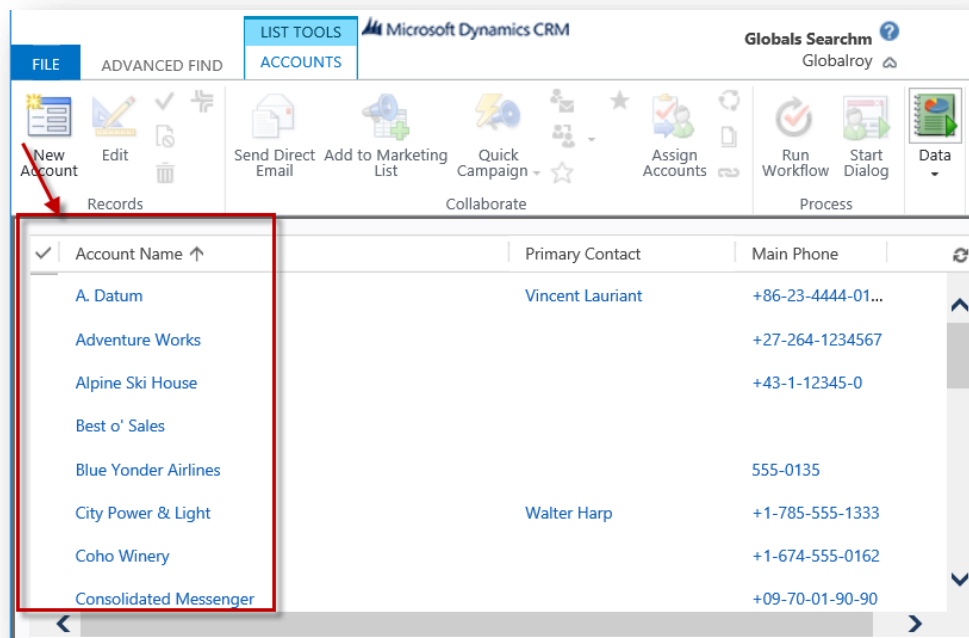


Figure 10: List of Accounts in CRM

3. You can see the Multi-File Uploader option as the entity was already selected in the configuration settings area.
4. Select the **Upload** radio button.

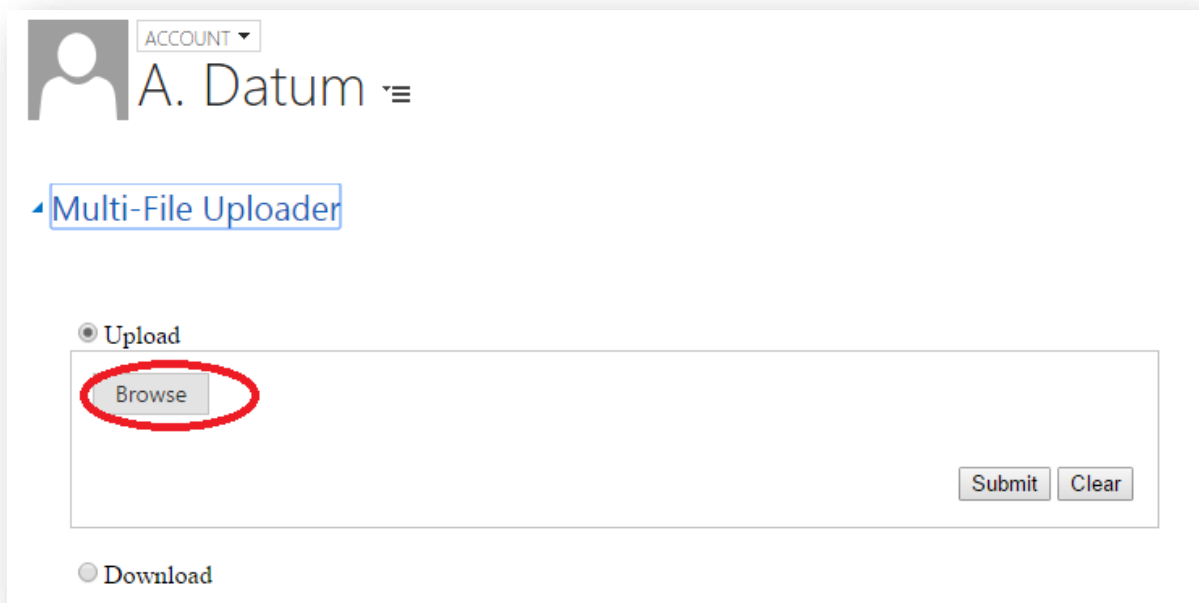
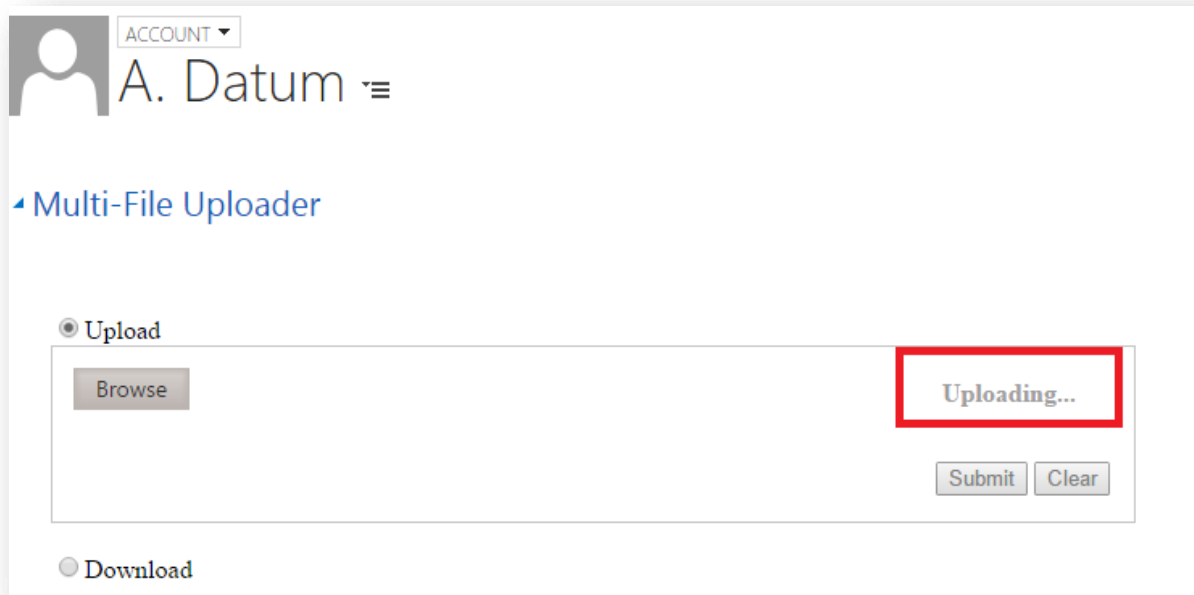


Figure 11: Select Upload and Browse

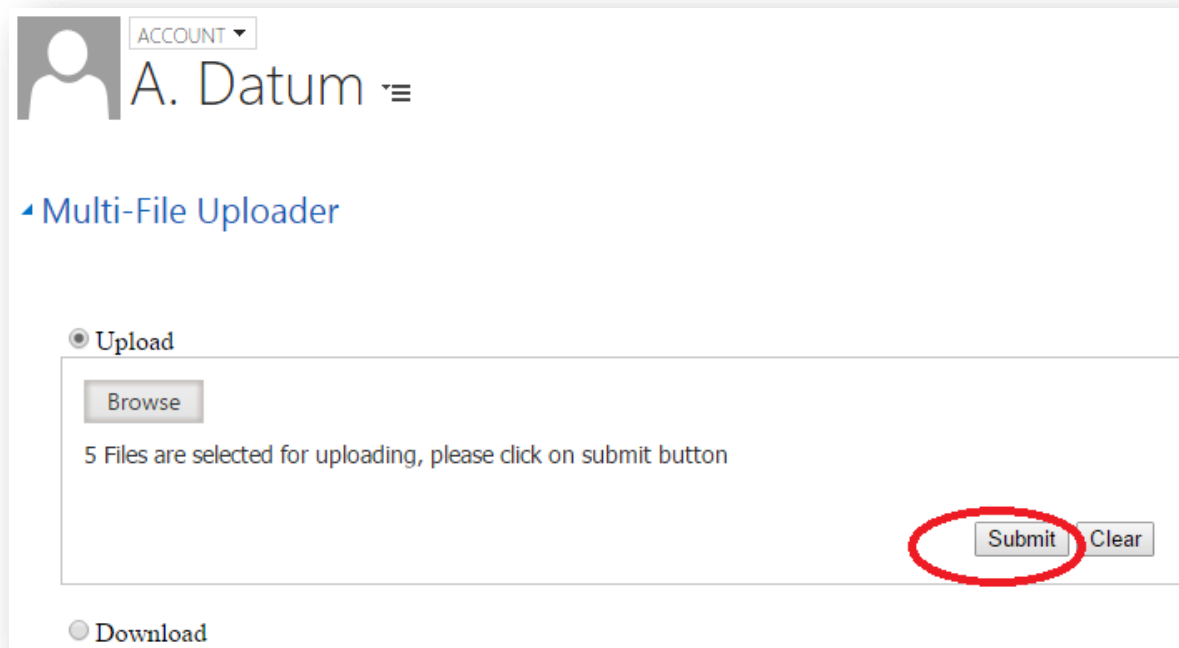
5. Browse files (word, zip, pdf, etc.) of your choice. Multi-File Uploader will notify you the no. of files selected and ready to be submitted.



The screenshot shows the user interface of the Multi-File Uploader. At the top, there is a user profile section with a placeholder icon, a dropdown menu labeled 'ACCOUNT', and the name 'A. Datum'. Below this is a navigation bar with a blue arrow and the text 'Multi-File Uploader'. The main content area has two radio buttons: 'Upload' (selected) and 'Download'. Under the 'Upload' section, there is a 'Browse' button. To the right of the 'Browse' button, the text 'Uploading...' is displayed and highlighted with a red rectangular box. Below this, there are 'Submit' and 'Clear' buttons.

Figure 12: Uploading Status

6. Click on **Submit** button to upload the files. Click on **Clear** to discard the selection.



The screenshot shows the same user interface as Figure 12. The 'Upload' radio button is selected. Below the 'Browse' button, the text '5 Files are selected for uploading, please click on submit button' is displayed. At the bottom right, the 'Submit' button is highlighted with a red oval, and the 'Clear' button is also visible.

Figure 13: Submit

7. Files thus uploaded can be seen under **Notes**.

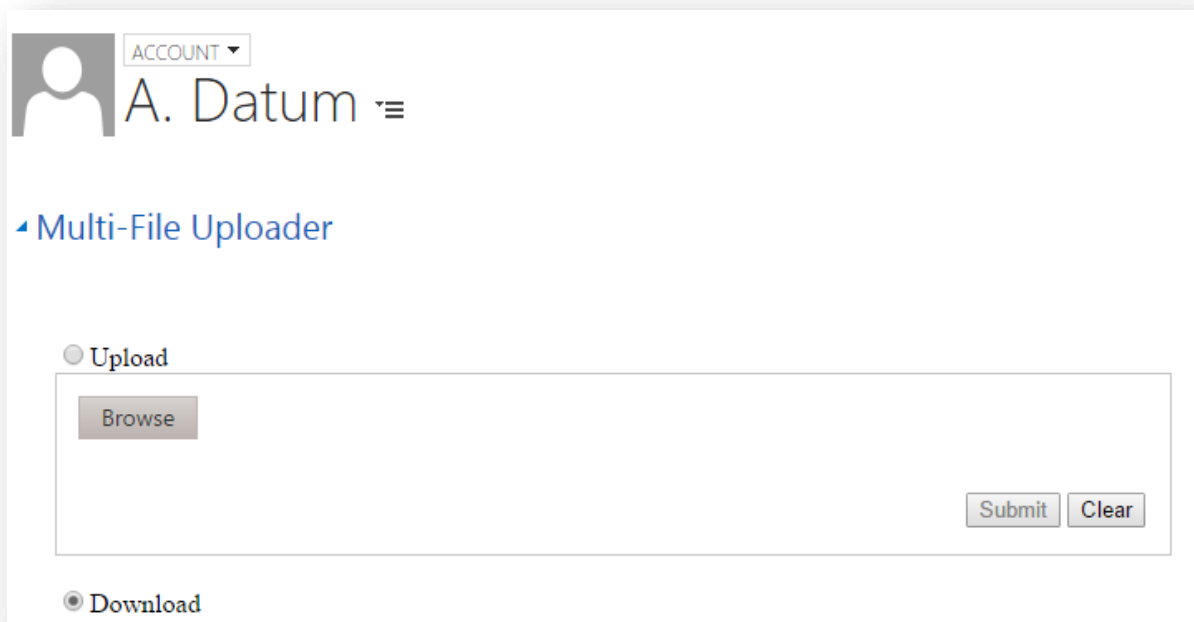
Likewise, you can repeat the above steps to upload files in other entities as well.

Note1: Except for Appointments and Email, the uploaded files can be found under Notes. For Appointments and Email, the uploaded files can be found under Attachments.

Downloading Multiple Files

In order to download multiple files to a given entity, you need to follow the below steps. (For your understanding, let's use Multi-File Uploader on Account entity)

1. Use "Advance Find" button and search for Accounts in your CRM.
2. Select and open any listed Account.
3. You can see the Multi-File Uploader option as the entity was already selected in the configuration settings area.
4. Select the **Download radio button**.



The screenshot shows the 'Multi-File Uploader' interface for the account 'A. Datum'. At the top, there is a user profile icon and a dropdown menu labeled 'ACCOUNT'. Below this, the account name 'A. Datum' is displayed with a menu icon. The 'Multi-File Uploader' section has two radio buttons: 'Upload' and 'Download'. The 'Download' radio button is selected. Below the 'Upload' radio button is a 'Browse' button. At the bottom right of the 'Upload' section are 'Submit' and 'Clear' buttons. The 'Download' radio button is located below the 'Upload' section.

Figure 14: Select Download

5. A window with the list of available attached files for this account pops up. You can select a single or multiple files and click on Download. (or) You can as well delete these files by selecting and clicking on Delete.

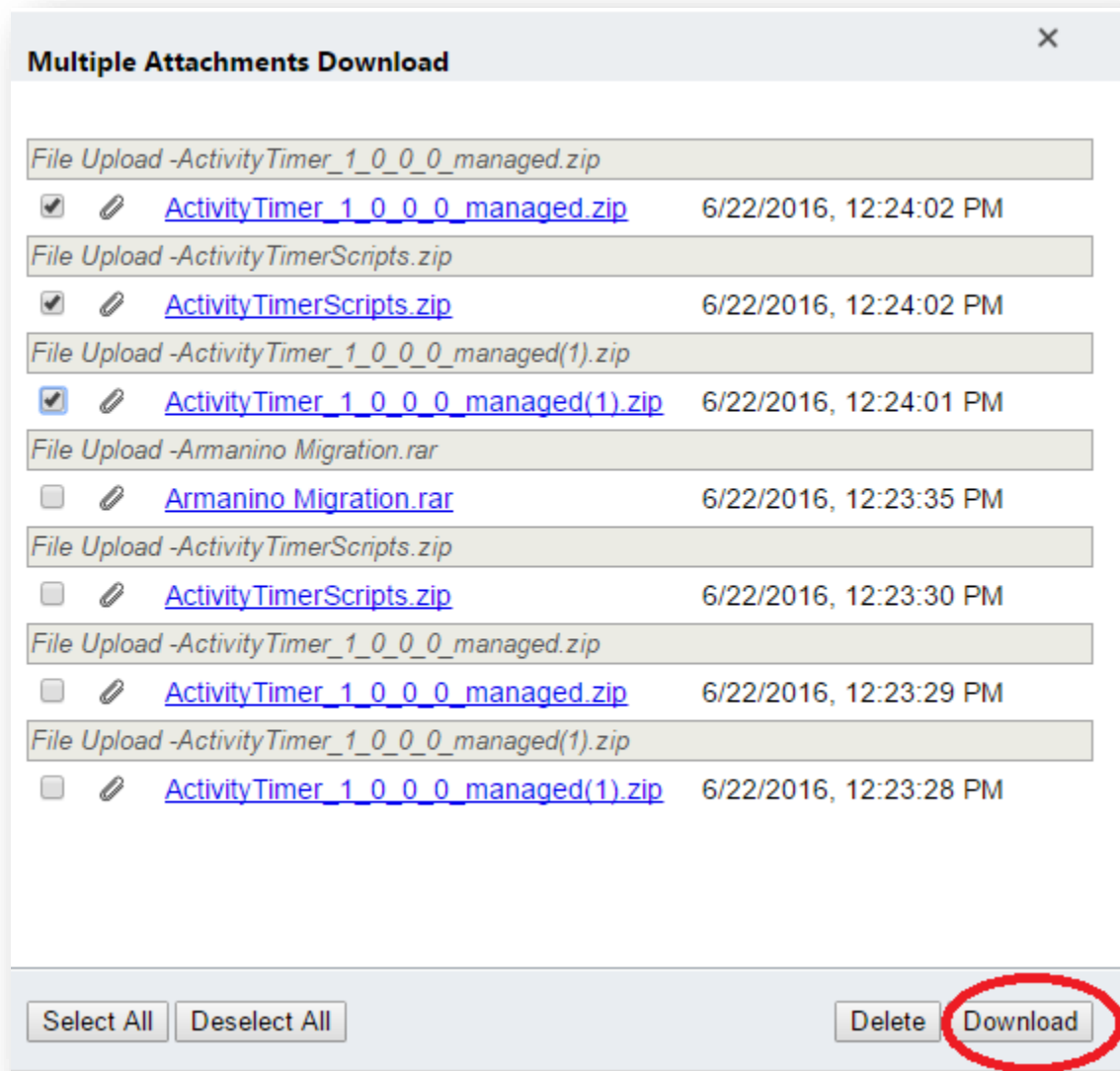


Figure 15: Select Attachments to Download

- Files thus downloaded can be found in your Downloads Folder.

Multi-File Uploader

☐ Upload

Browse

☒ Download

Submit

Summary

ACCOUNT INFORMATION

Account Name *	A. Datum
Phone	+86-23-4444-0100
Email	vlauriant@adatum.com
Website	http://www.adatum.com
Parent Account	--
Ticker Symbol	ADATU

ADDRESS

Magui Lan
 Guangzhou, Guangdong 650031
 Republic of China

POSTS

AC

File Upload

ActivityTimerScripts.zip

Mtc User - Today 12:24:02 PM

File Upload - ActivityTimer_1_0_0_0_managed(1).zip

ActivityTimer_1_0_0_0_managed(1).zip

Mtc User - Today 12:24:01 PM

Active

ActivityTimer_1_0_0_0_managed.zip

ActivityTimerScripts.zip

ActivityTimer_1_0_0_0_managed(1).zip

Multiple Attachments Download

File Upload - ActivityTimer_1_0_0_0_managed.zip

☒
[ActivityTimer_1_0_0_0_managed.zip](#)
6/22/2016, 12:24:02 PM

File Upload - ActivityTimerScripts.zip

☒
[ActivityTimerScripts.zip](#)
6/22/2016, 12:24:02 PM

File Upload - ActivityTimer_1_0_0_0_managed(1).zip

☒
[ActivityTimer_1_0_0_0_managed\(1\).zip](#)
6/22/2016, 12:24:01 PM

File Upload - Armanino Migration.rar

☐
[Armanino Migration.rar](#)
6/22/2016, 12:23:35 PM

File Upload - ActivityTimerScripts.zip

☐
[ActivityTimerScripts.zip](#)
6/22/2016, 12:23:30 PM

File Upload - ActivityTimer_1_0_0_0_managed.zip

☐
[ActivityTimer_1_0_0_0_managed.zip](#)
6/22/2016, 12:23:29 PM

File Upload - ActivityTimer_1_0_0_0_managed(1).zip

☐
[ActivityTimer_1_0_0_0_managed\(1\).zip](#)
6/22/2016, 12:23:28 PM

Select All

Deselect All

Delete

Download

Figure 16: Attachments Downloaded

Once the solution gets installed onto your CRM platform, you can see the solution being reflected in the navigation bar. Sometimes, you are required to refresh the page to see the solution. Then follow the below steps to get started with the solution.

Uninstallation

To uninstall Multi-File Uploader, 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.

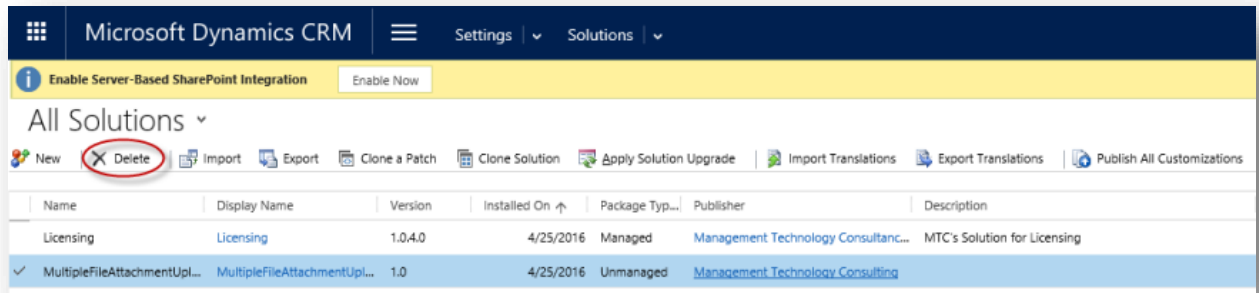


Figure 17: Delete

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

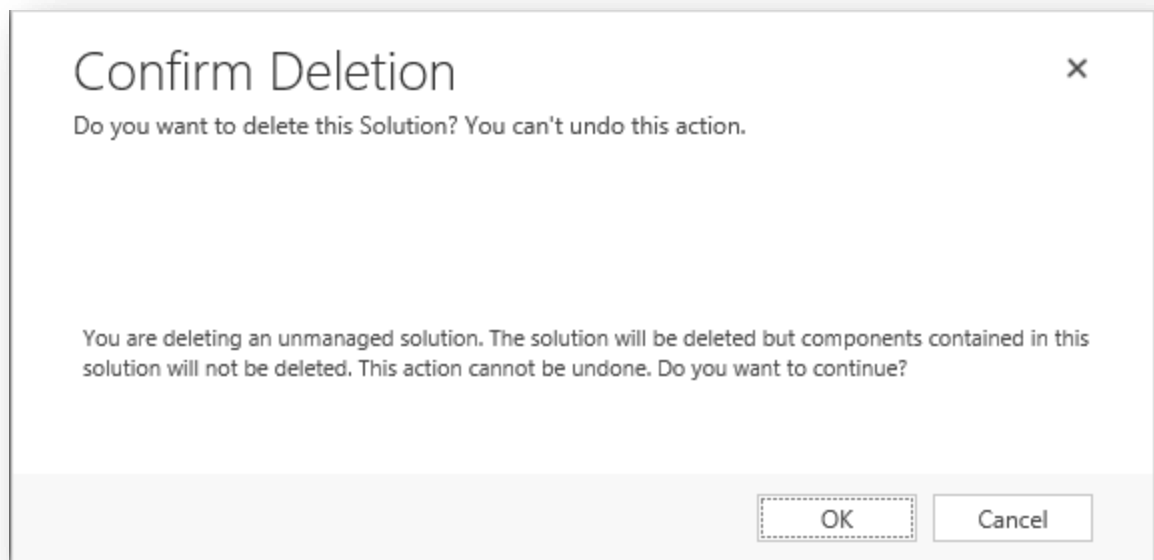


Figure 18: Confirm Deletion

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.

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USA Headquarters:
Management Technologies Consulting, LLC
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