



Dynamics 365 / CRM Platform



CRM Picture

User Guide



CRM Versions Supported:
2013/2015/2016/D 365

CRM Picture for Dynamics 365/CRM is a Managed Solution add-in for adding a Picture or art Frame to any standard or custom CRM Entity form. CRM Picture instantly and inexpensively adds image management to your CRM. It's a self-installable solution.

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Table of Contents

COPYRIGHT 2

DISCLAIMER 2

PRODUCT OVERVIEW 5

LICENSE KEY 6

INSTALLATION PROCESS 7

**DYNAMICS 365 SOLUTION - TRIAL LICENSE ACTIVATION/ PRODUCT LICENSE PURCHASE/
ADDITIONAL USER LICENSE PURCHASE13**

CRM PICTURE FUNCTIONALITY14

UNINSTALLATION PROCESS20

MTC OVERVIEW21

 The Global CRM Community DynamicsExchange.com 22

 End User License Agreement (EULA)..... 22



Table of Figures

Figure 1 : Developer Resources..... 6

Figure 2 : Organization Unique Name 6

Figure 3: Import Solution 7

Figure 4 : Select Solution Package 8

Figure 5: Solution Information 9

Figure 6: Import Options..... 9

Figure 7: Importing customization 10

Figure 8: Navigation for licensing window 11

Figure 9: Placing the License key 12

Figure 10: CRM Picture Solution..... 14

Figure 11: Configuration Window 15

Figure 12: Select Contact 16

Figure 13: Click double arrow..... 16

Figure 14: Save Contact 17

Figure 15: Settings Changed..... 17

Figure 16: CRM Picture in Contact Record..... 18

Figure 17: Upload Picture 18

Figure 18: Sample Picture after Upload..... 19

Figure 19: Delete Picture 19

Figure 20 : Deleting CRM Picture Solution..... 20

Figure 21: Solution Deleted..... 21



Product Overview

Many Dynamics CRM users want the ability to add Picture to records. The CRM Picture add-on allows users to add CRM Picture to any entity like account, contact or lead record, and display those images on the record without having to open an attachment. You can also delete the picture whenever required.

License Key

- ➔ To install CRM Picture you will require License Key, which you can get by sending an E-mail requesting license key to salesteam@mtccrm.com with your **Organization Unique Name**.
- ➔ To access your Organization Unique Name Click on **Settings**→**Customizations**→**Developer resources** as shown below.

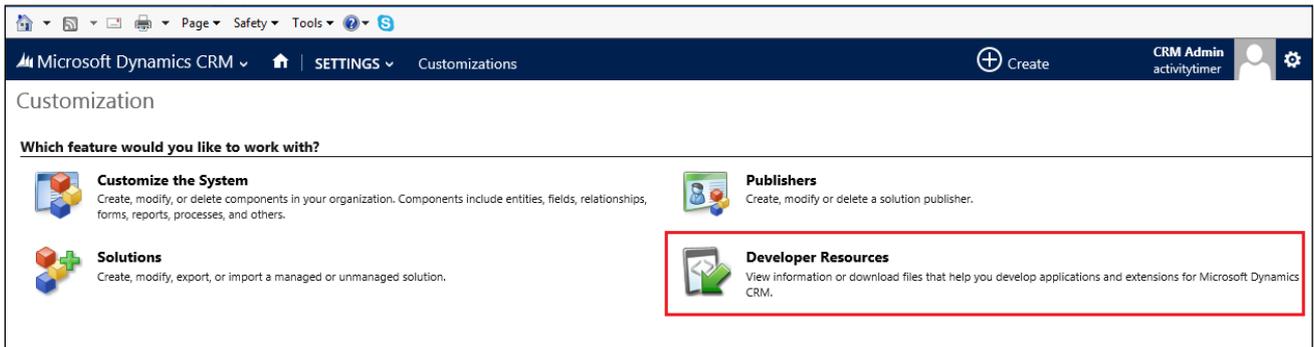


Figure 1 : Developer Resources

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

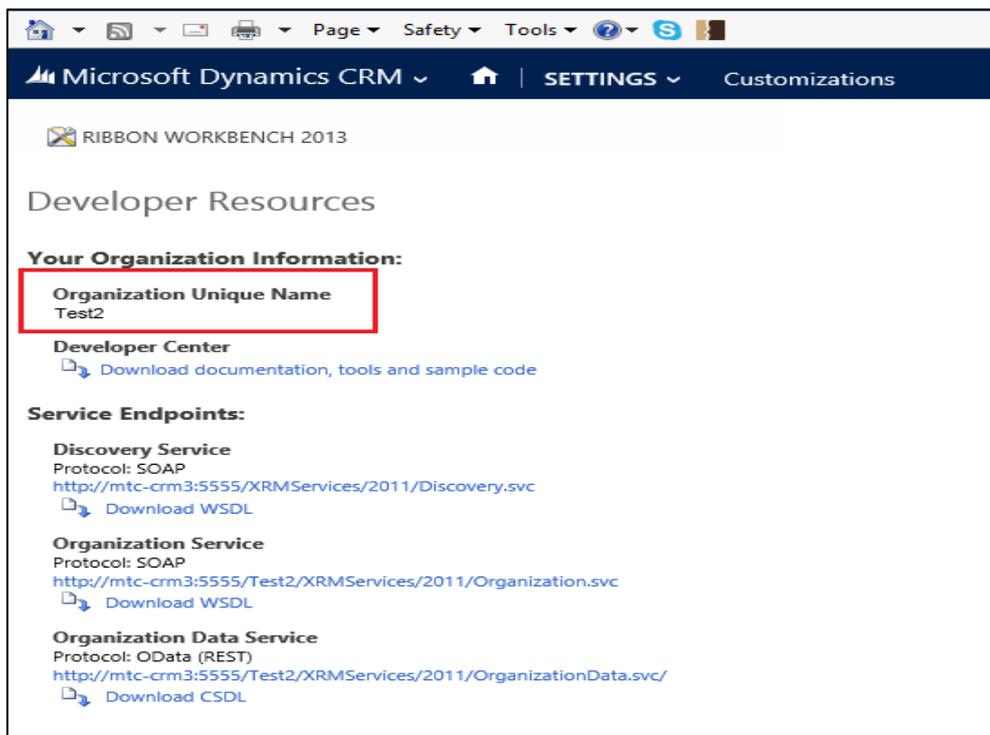


Figure 2 : Organization Unique Name

- ➔ 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 CRM Picture solution, the following steps are to be followed.

STEP 1:

- ➔ Go to <http://www.dynamicsexchange.com/PIC.aspx> click on Download to get Solution.

STEP 2:

- ➔ On Downloading you will get **CRMPicture_1_0_0_0 managed.zip**

STEP 3:

- ➔ Open your CRM click on **Settings**→**Solution**→**Import** it will open import Solution window.

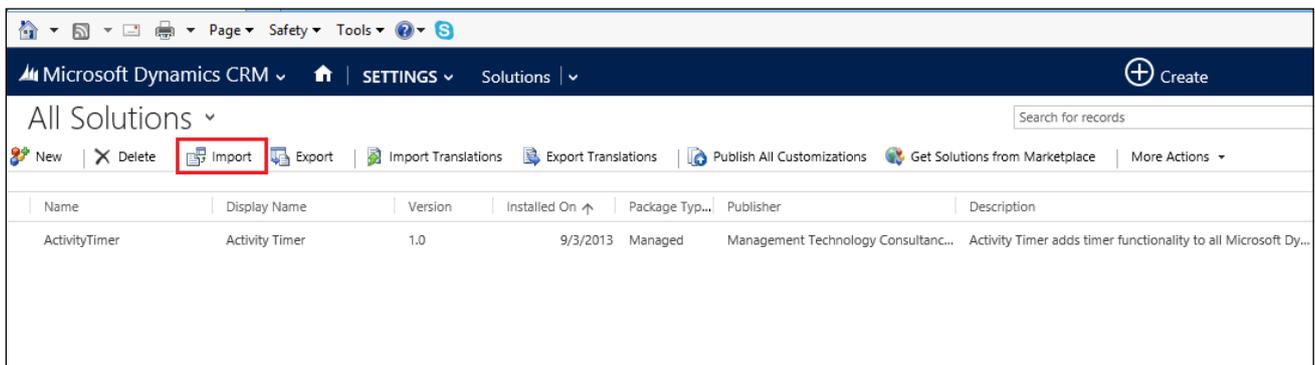


Figure 3: Import Solution

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

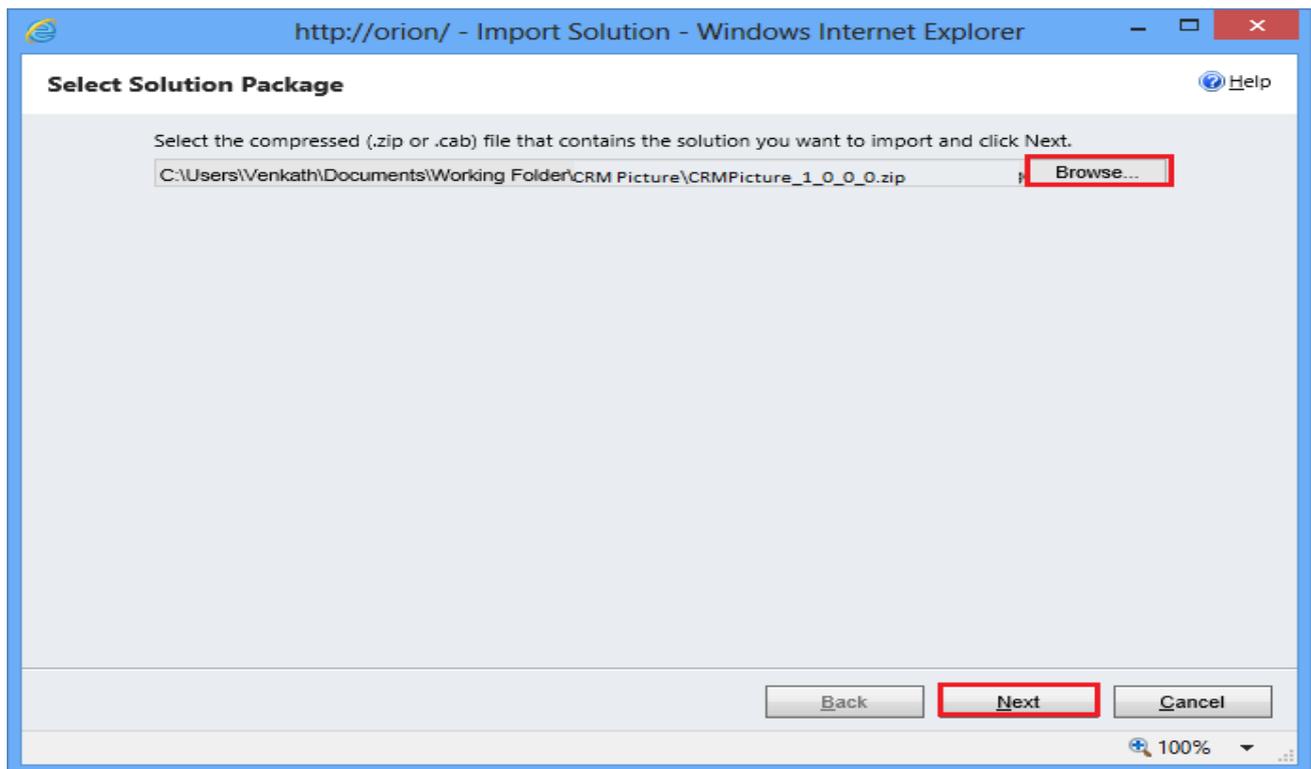


Figure 4 : Select Solution Package

- Solution information window will open. It gives the solution package details and general information.
Click on Next to continue.
- Click on next until it is finished and finally click on close.

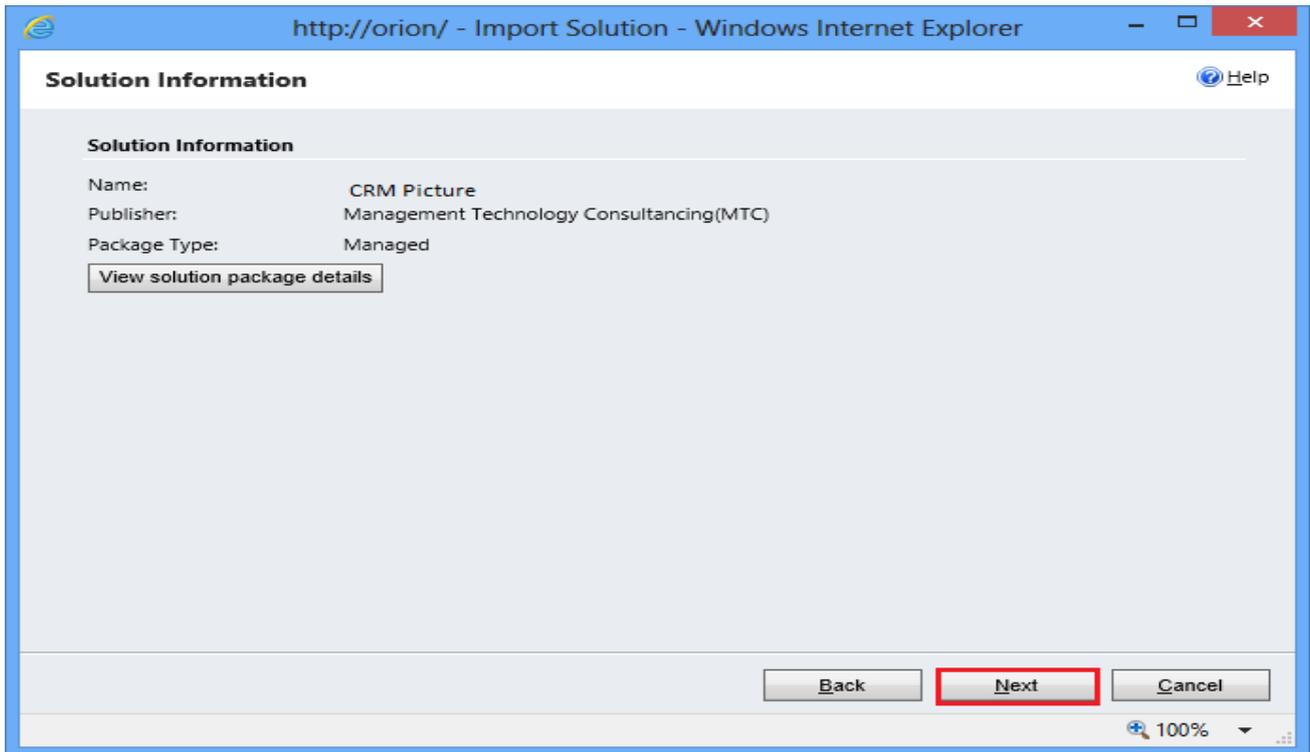


Figure 5: Solution Information

- ➔ Click on next it will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

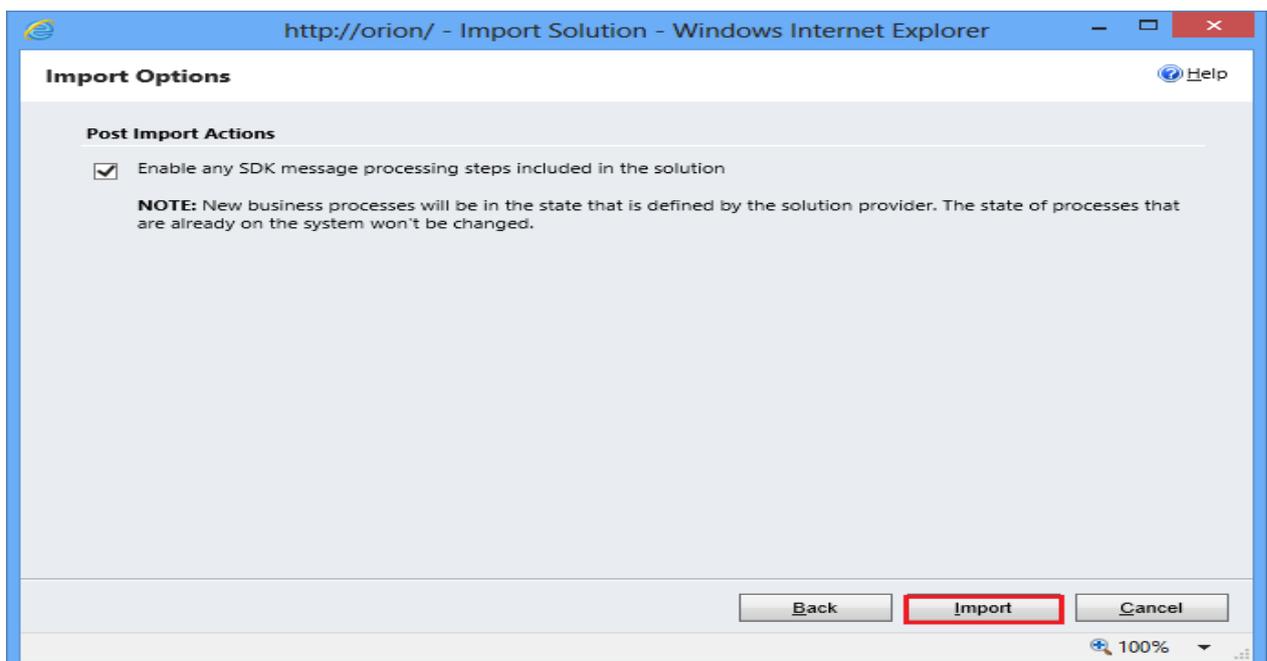


Figure 6: Import Options

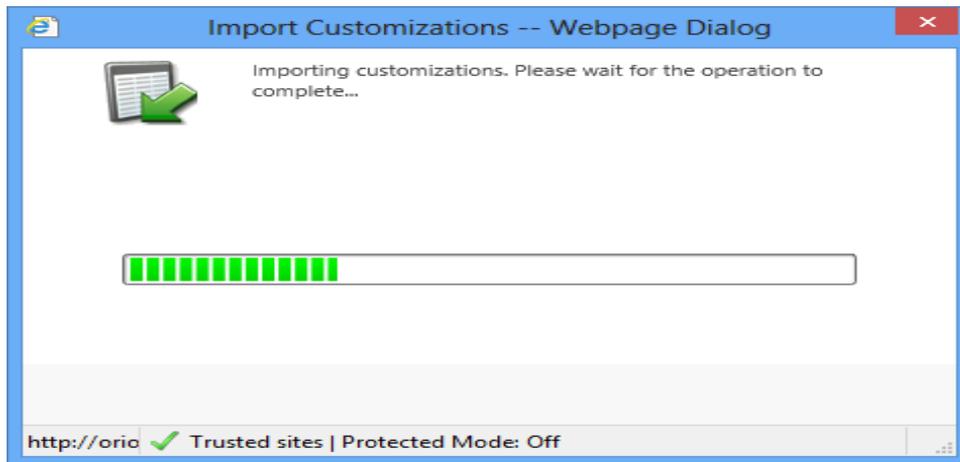
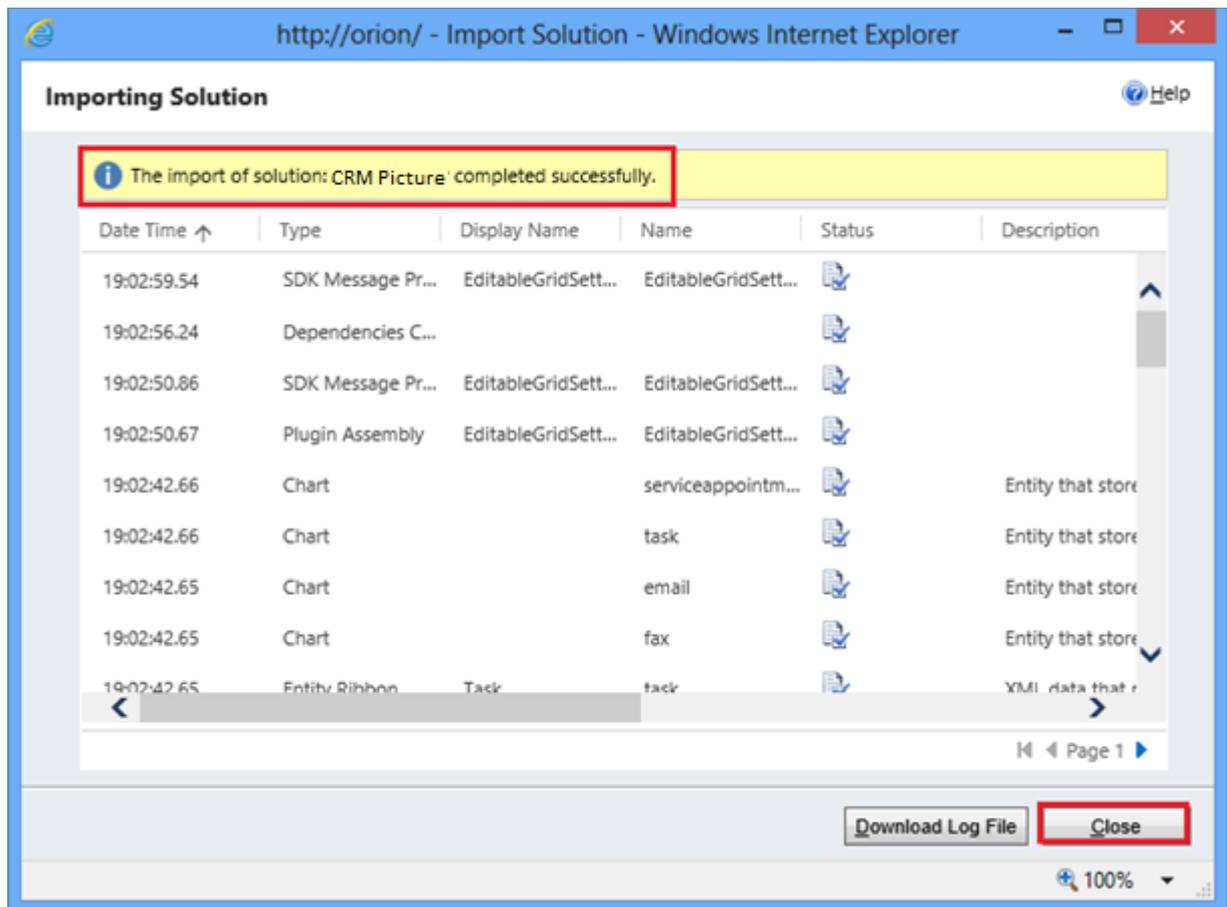


Figure 7: Importing customization



- ➔ After importing the CRM Picture Solution you need to place the License key navigate to **settings** → **solution** → Click on **MSCRIM Photo** solution

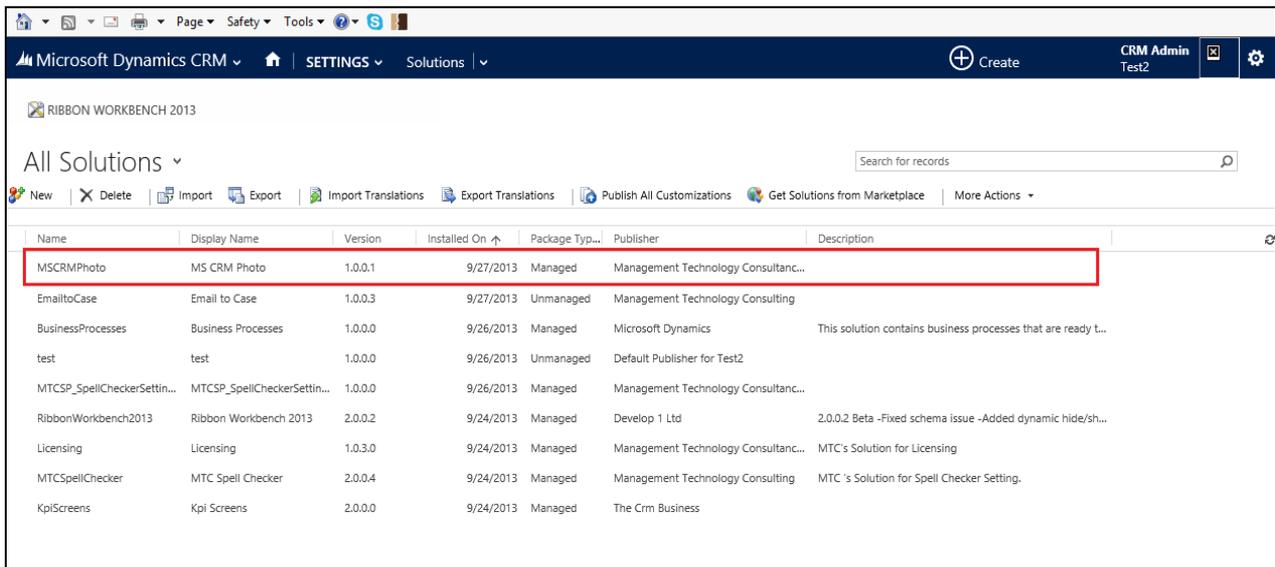


Figure 8: Navigation for licensing window

- Enter the License key which you have received after placing the request presses the tab to enable submit button and click on submit then a pop up window appears and displays the message as **License Accepted**. Click on **OK**.

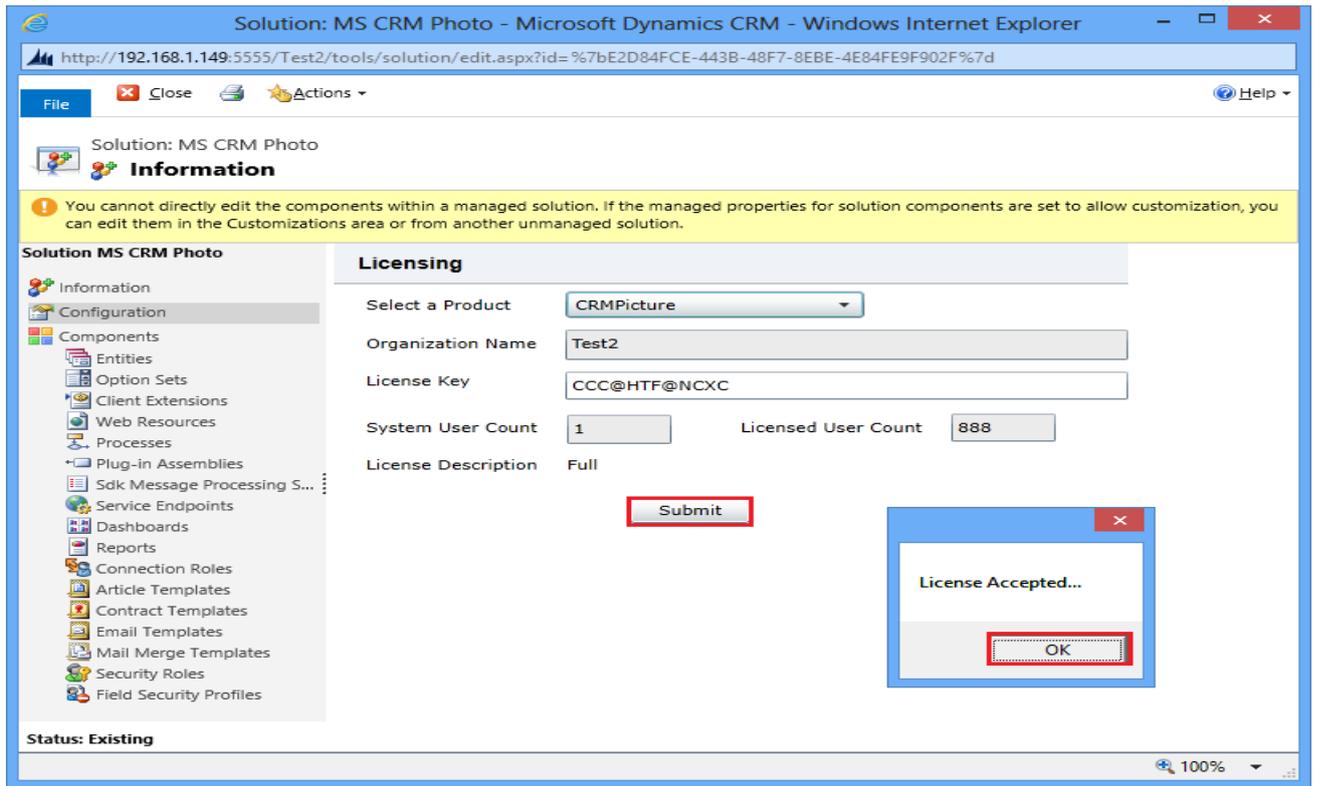


Figure 9: Placing the License key



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.



CRM Picture Functionality

CRM Picture allows you to add pictures for all entities both system as well as custom entities through simple configuration settings.

- Go to Settings → Solutions. Click on MSCRM Photo solution.

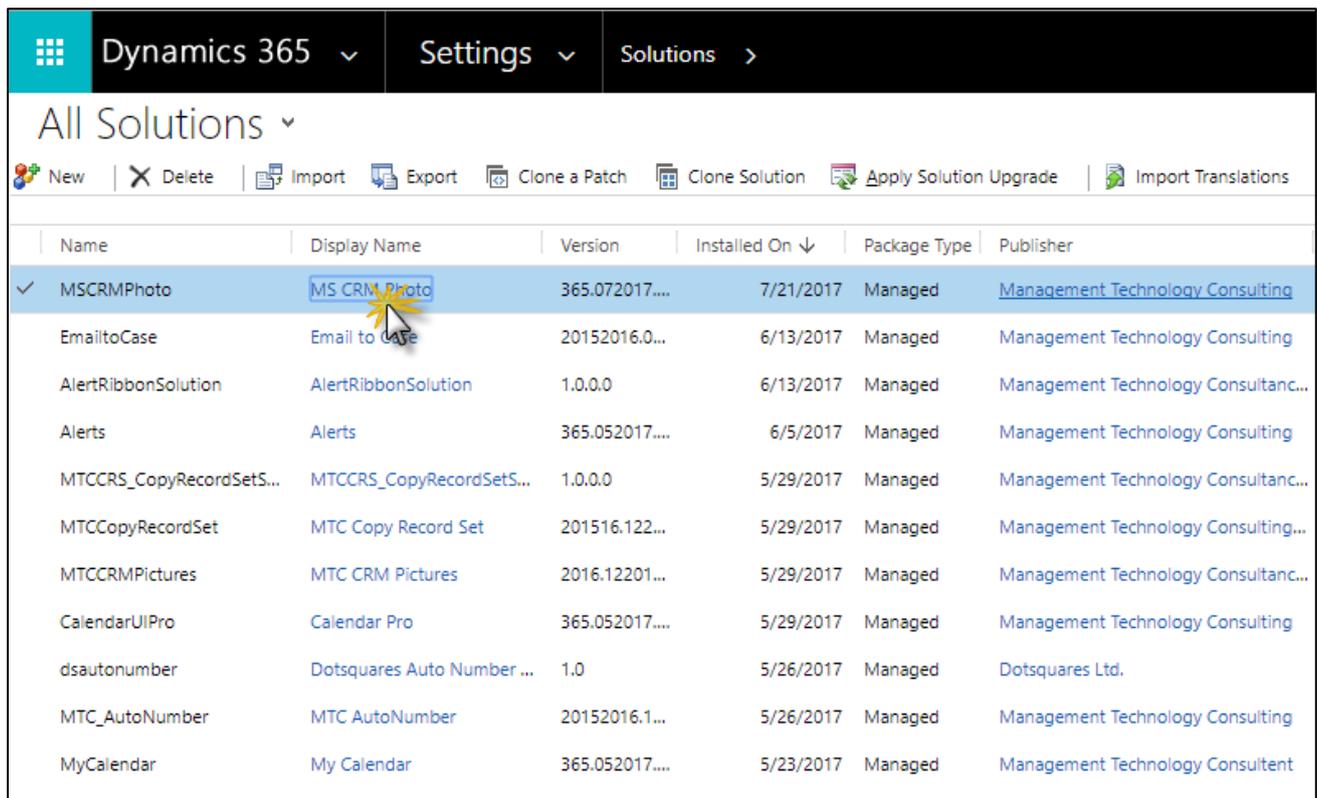


Figure 10: CRM Picture Solution

- A Configuration window pops up. The left hand side pane contains all the **Available Entities** on which you can apply the CRM Picture functionality whereas the right hand side pane displays the list of **Selected Entities** on which CRM Picture functionality has already been applied.

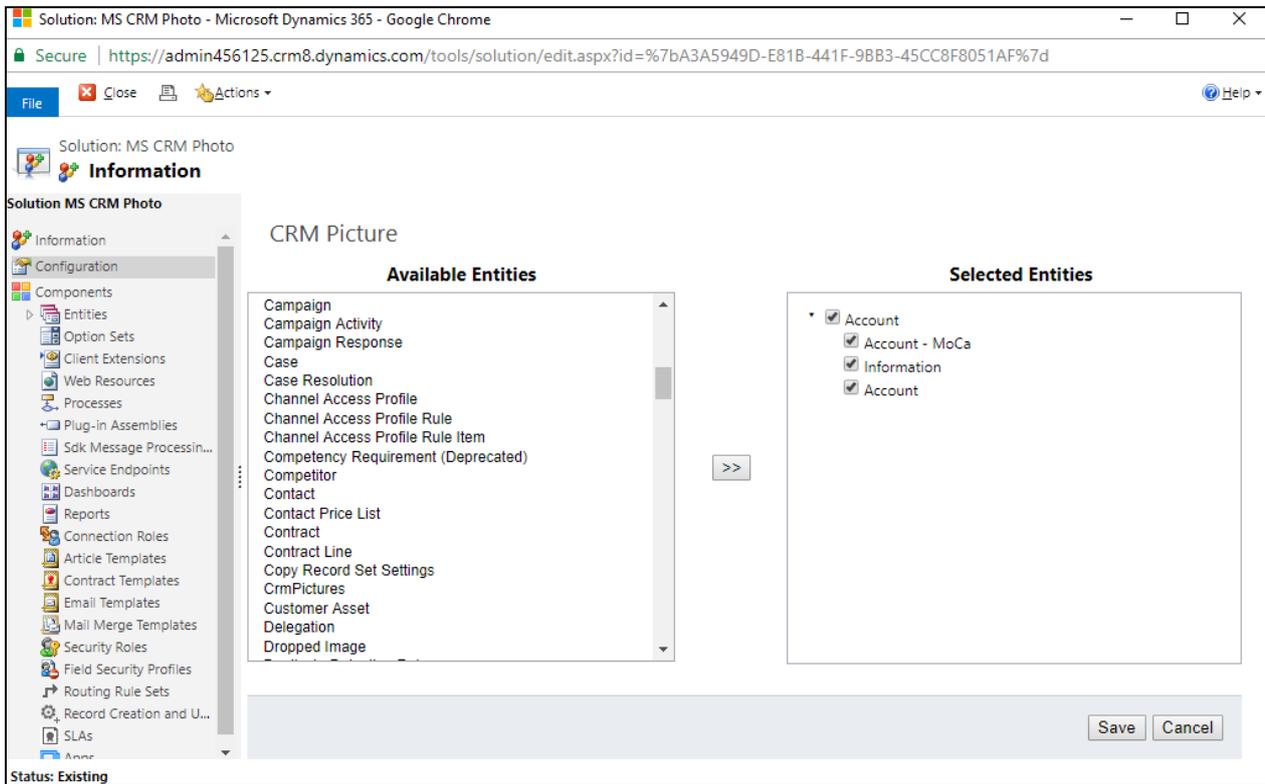


Figure 11: Configuration Window

- For applying CRM Picture functionality on a particular entity, simply select the entity from **Available Entities** and click on the double arrow >>. The selection would be reflected on the **Selected Entities**. Check box the entity and click on **Save** button.
- For example, let's apply CRM Picture functionality on Contact entity. Select Contact from Available Entities pane.

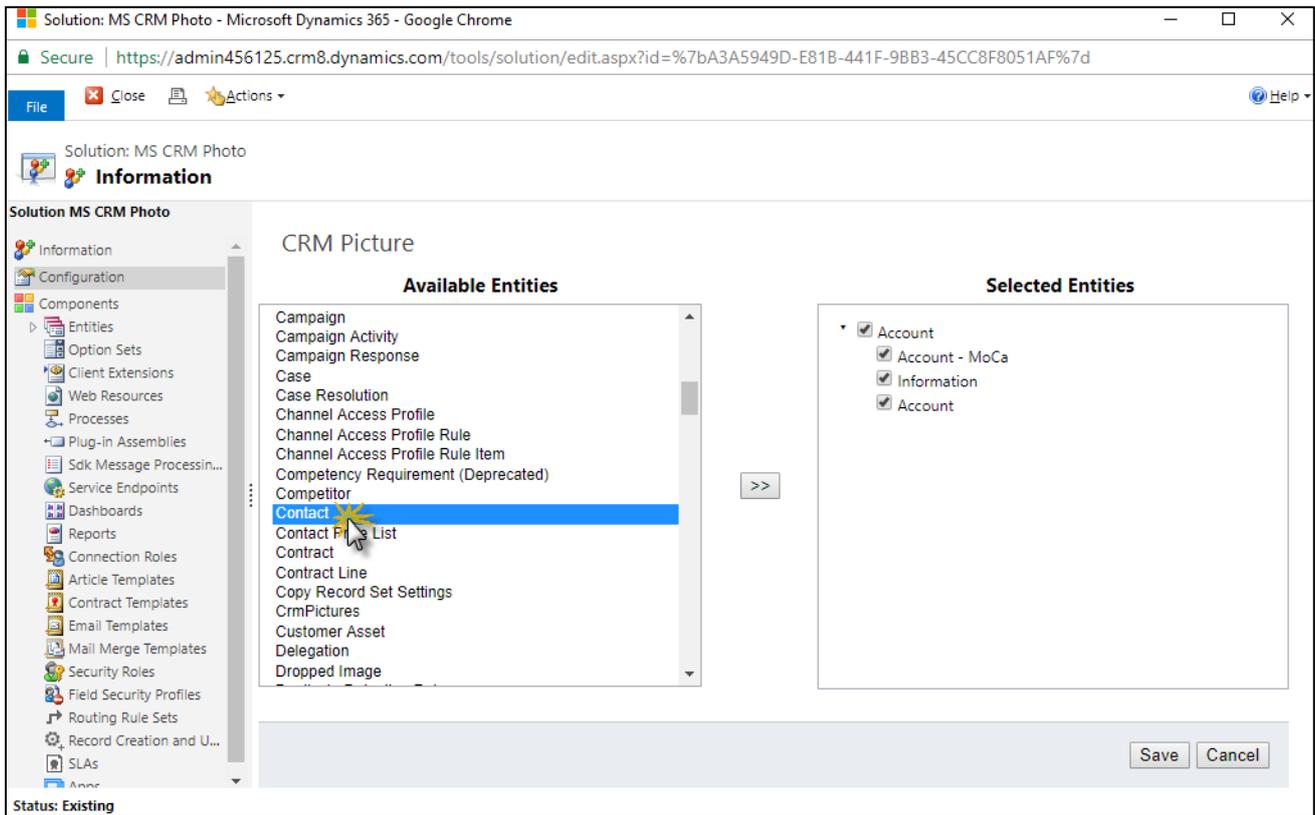


Figure 12: Select Contact

- Click on the double arrow.

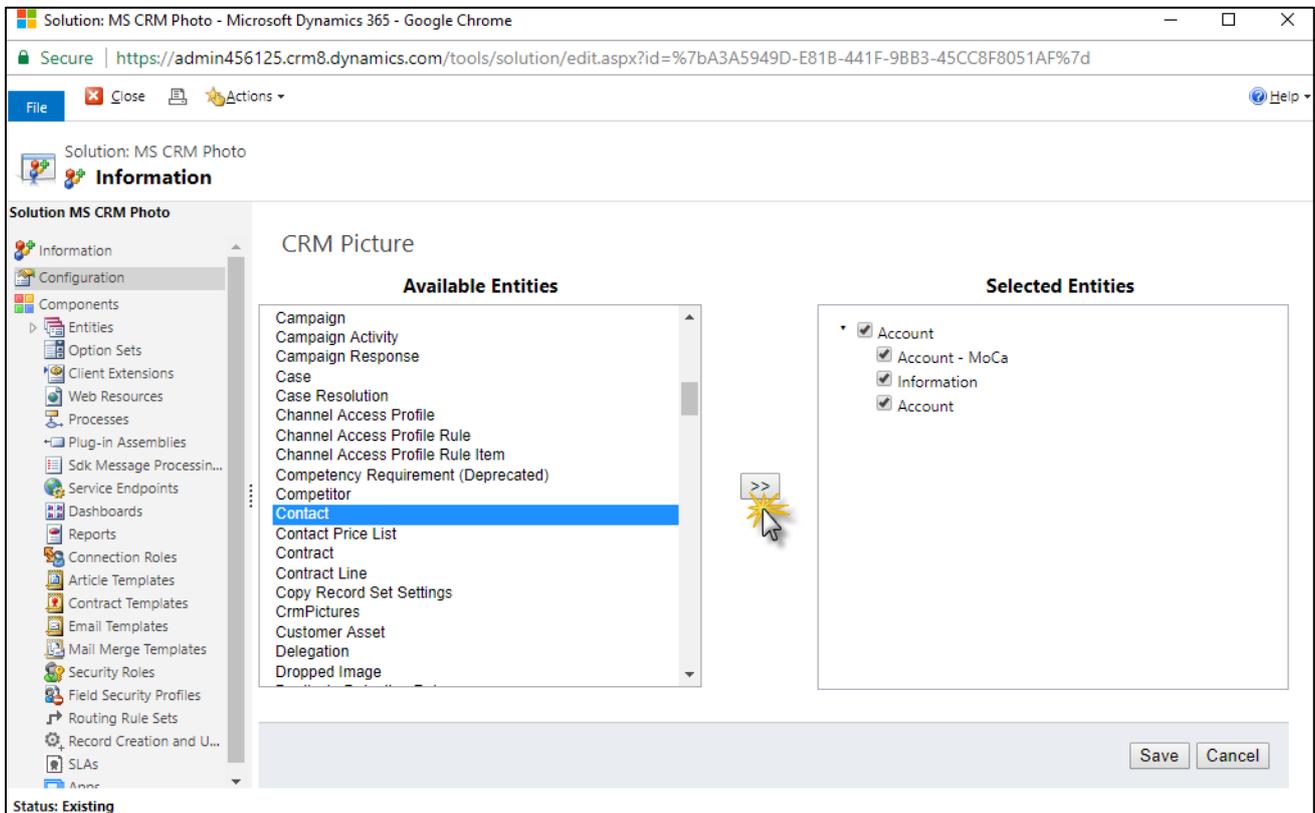


Figure 13: Click double arrow



- Contact entity will be selected and displayed on the Selected Entities pane. Check box contact and click on Save.

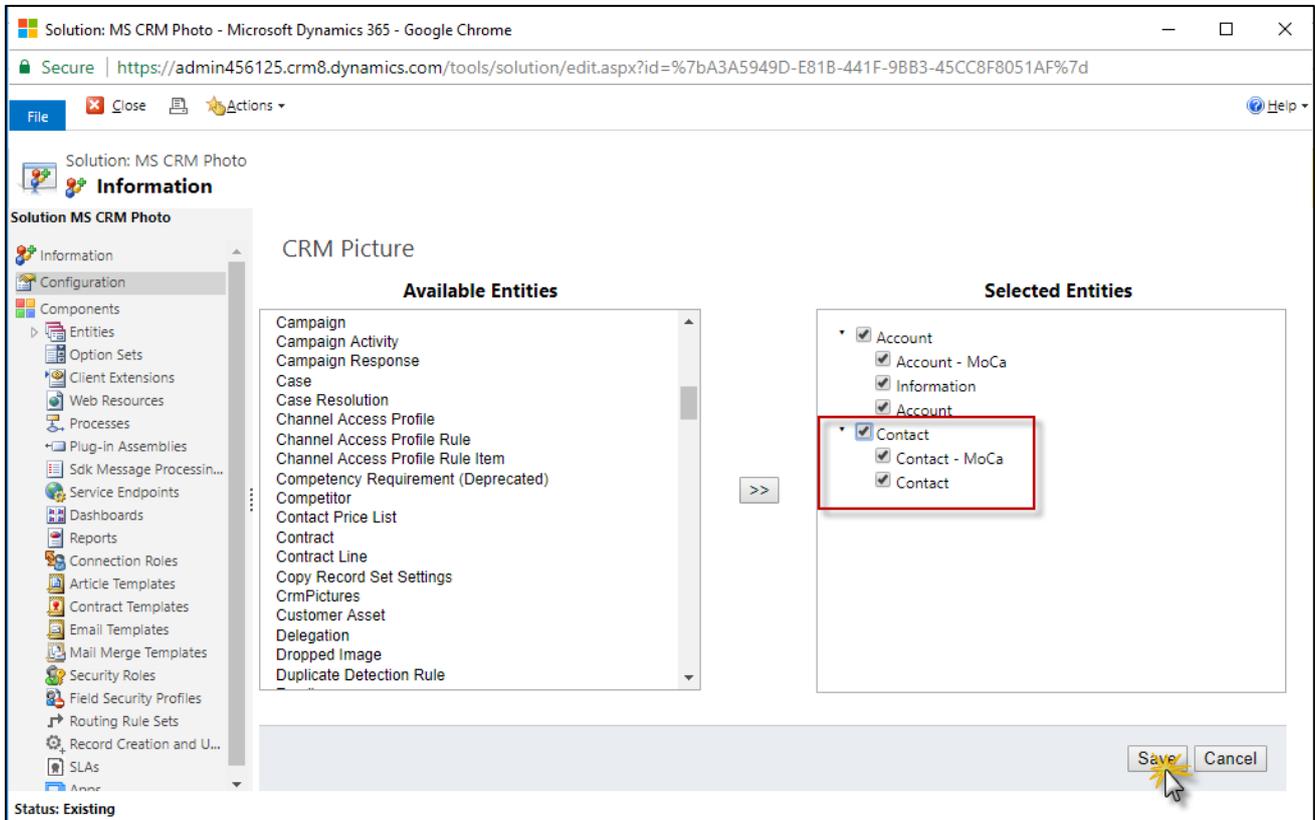


Figure 14: Save Contact

- A Settings changed window pops up. Click on OK.

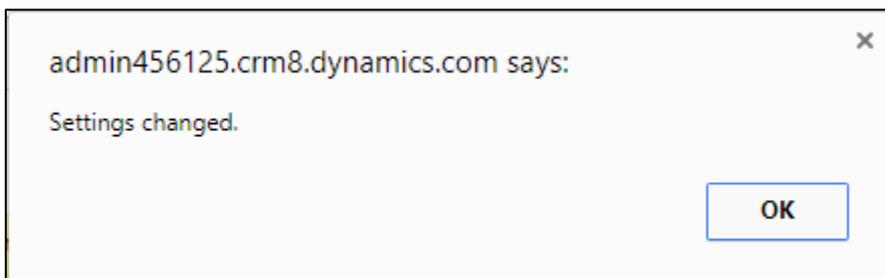


Figure 15: Settings Changed



- Now go to Sales → Contact. Click and open any sample contact to see the CRM Picture functionality box.



Figure 16: CRM Picture in Contact Record

- To upload your favorite picture from computer, click on upload icon as indicated below.

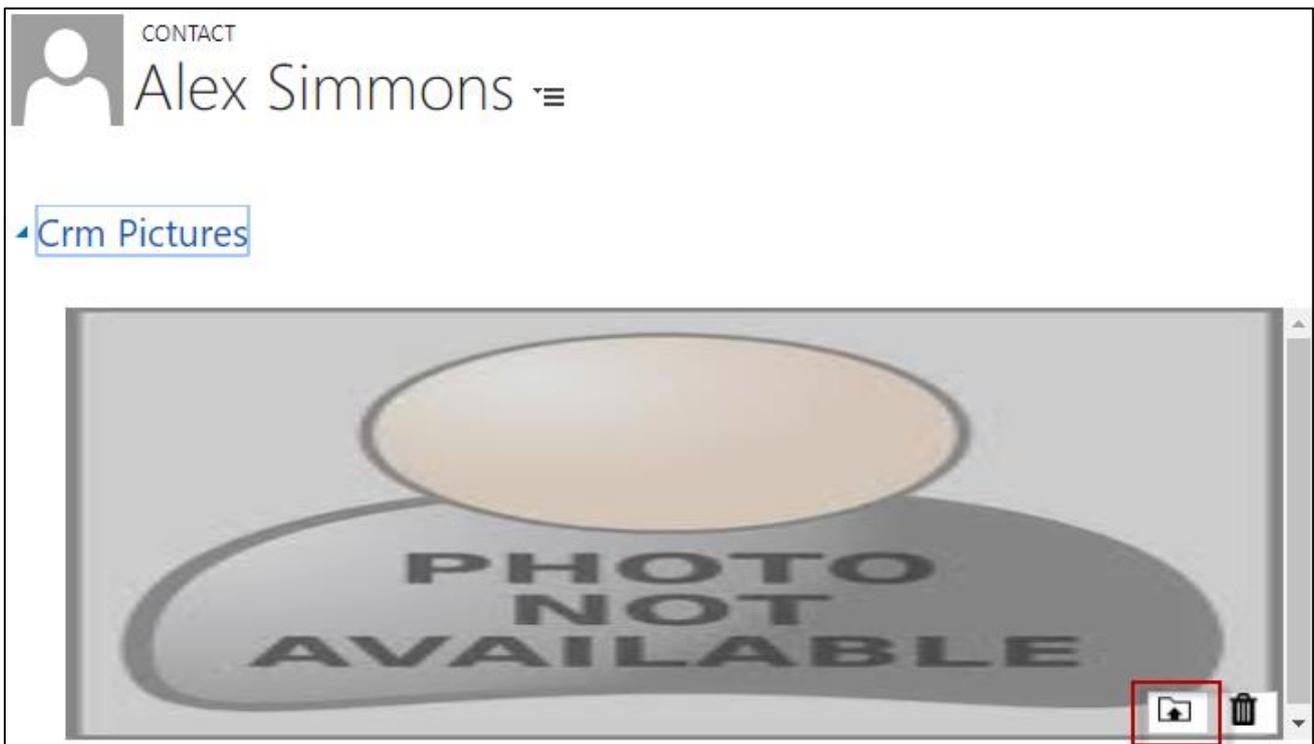


Figure 17: Upload Picture



- Sample picture is shown below.

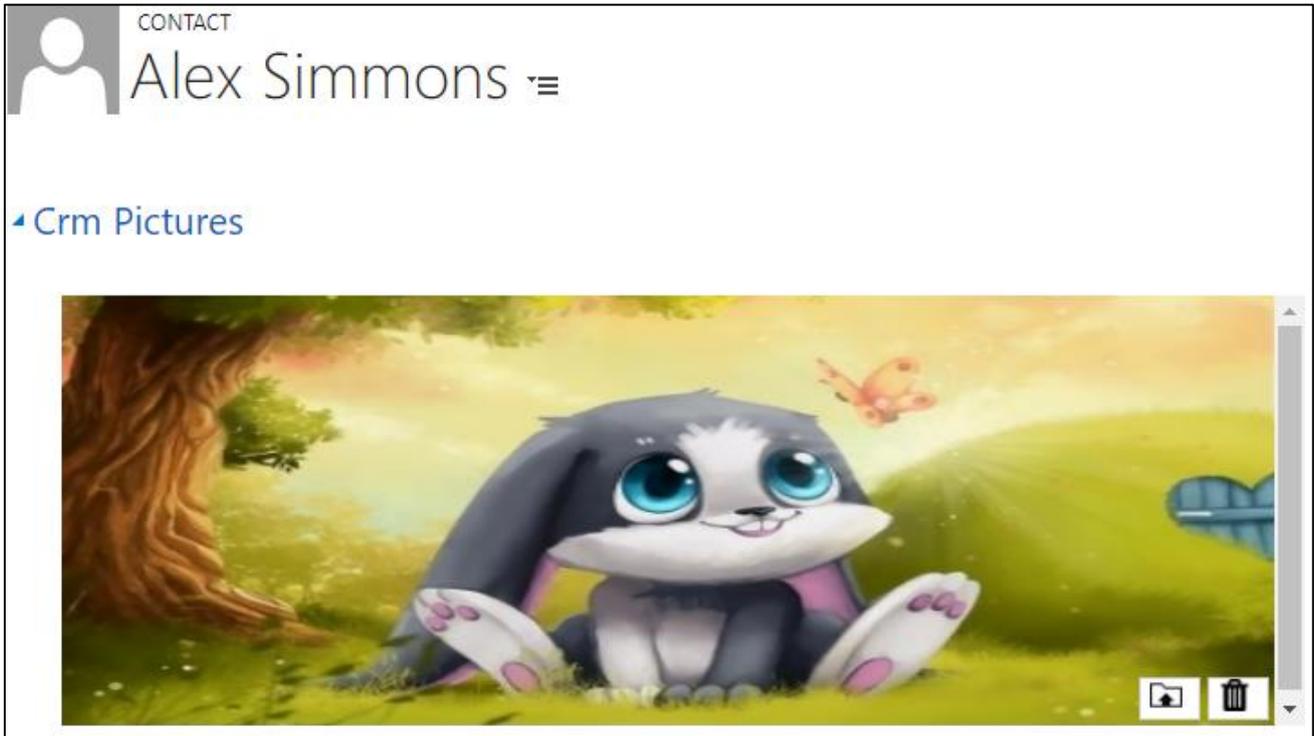


Figure 18: Sample Picture after Upload

- To delete the picture, simply click on the delete icon as indicated below.

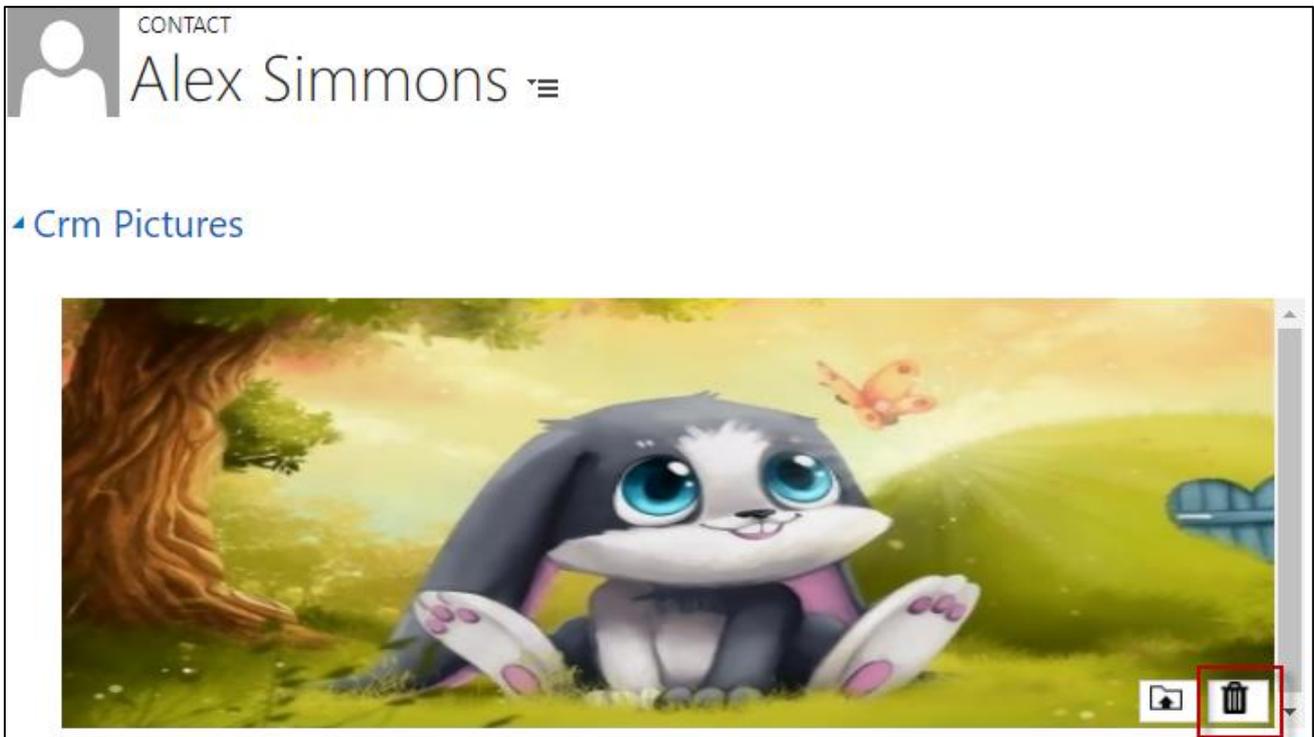


Figure 19: Delete Picture

Likewise, you can configure CRM Picture on different entities from configuration window and upload the pictures accordingly.

Uninstallation Process

- ➔ To uninstall this solution, you need to delete CRM Picture solution. Navigation is **Settings** → **Solutions** → Select the check box of **CRM Picture** then click on **Delete** as shown below for other solution also follow the same process.

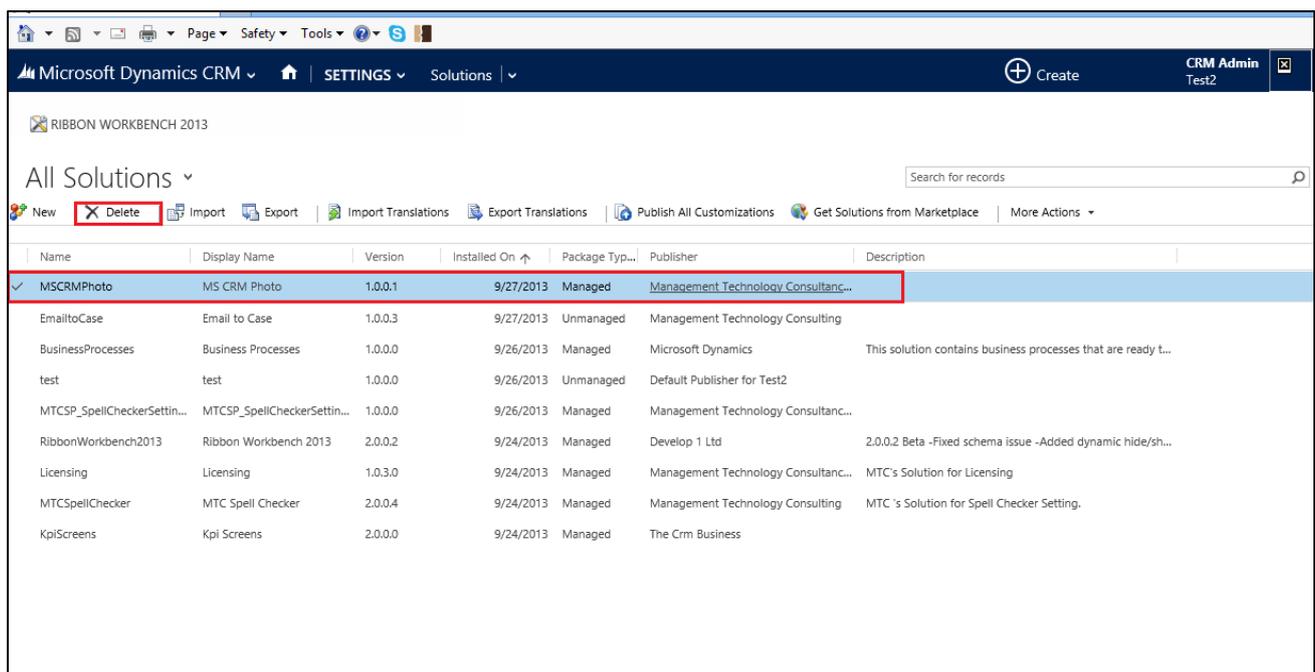


Figure 20 : Deleting CRM Picture Solution

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

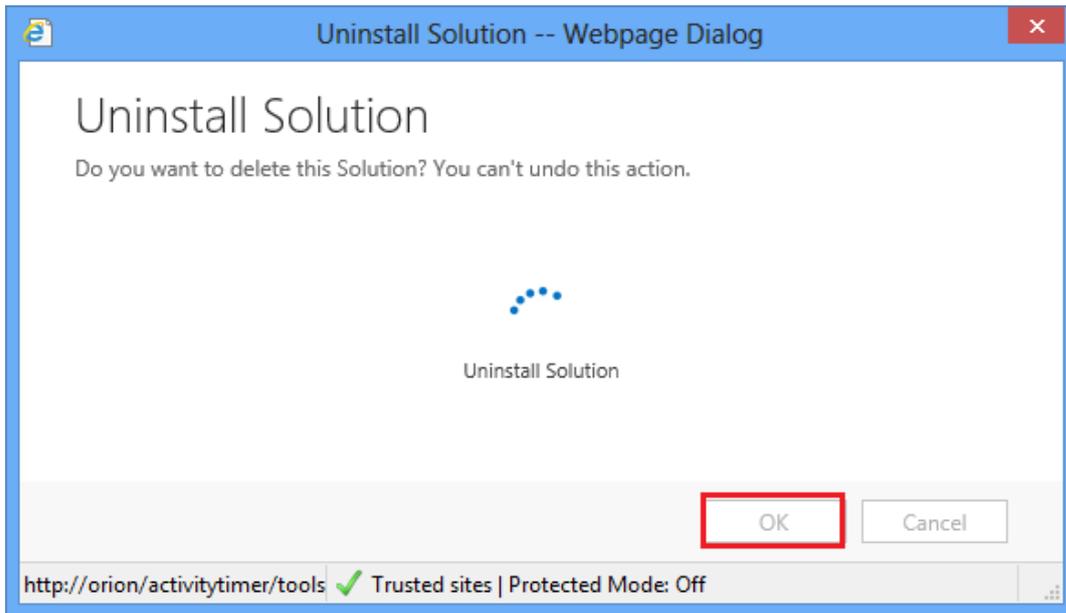


Figure 21: Solution Deleted

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Management Technology Consulting LLC (MTC) is dedicated exclusively to the Dynamics 365 / CRM platform and CRM web technologies in the business of delivering add-on products and services.



portal



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