

# User Guide

Of

Dynamic CRM Solution-**Multi files uploader**



## **DISCLAIMER**

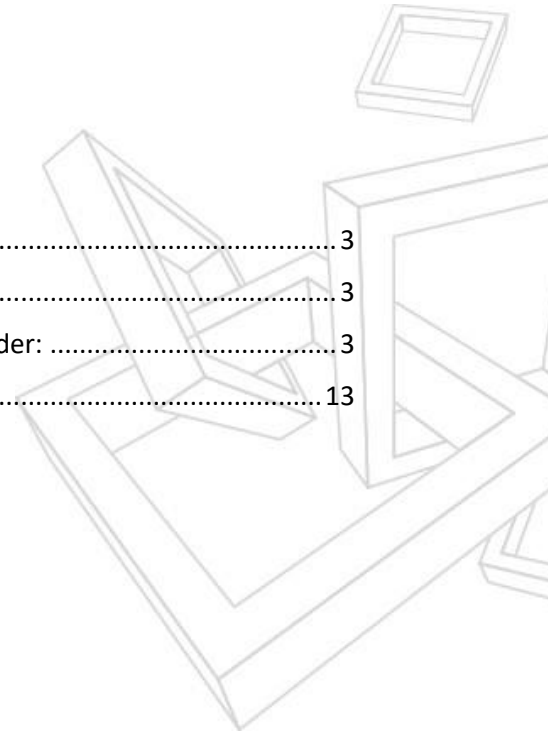
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<http://www.dotsquares.com/terms>

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## Product Overview:

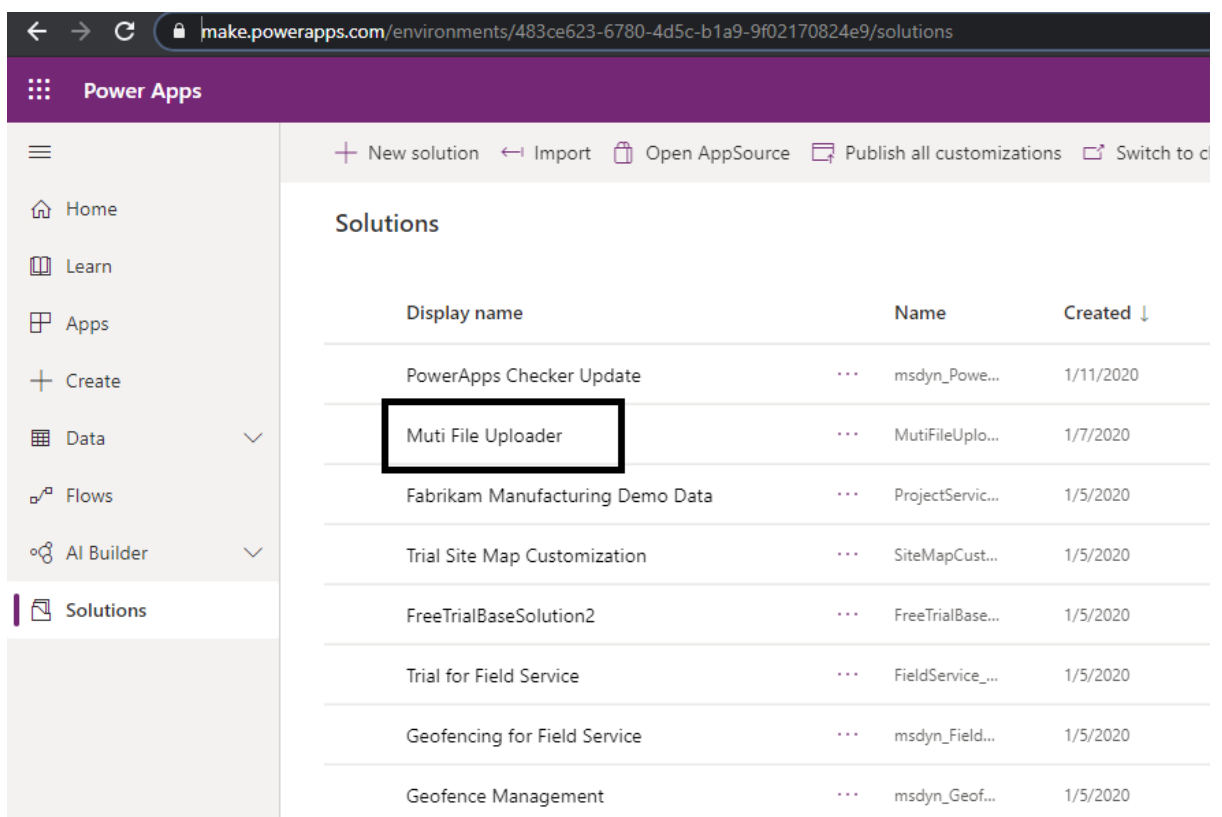
The Dotsquares-Multi files uploader is a Dynamic CRM solution that allows the user to upload multiple files into Notes by browse or Drag drop feature. It is supported for any entity form that enabled notes as attachment.

## Salient Features:

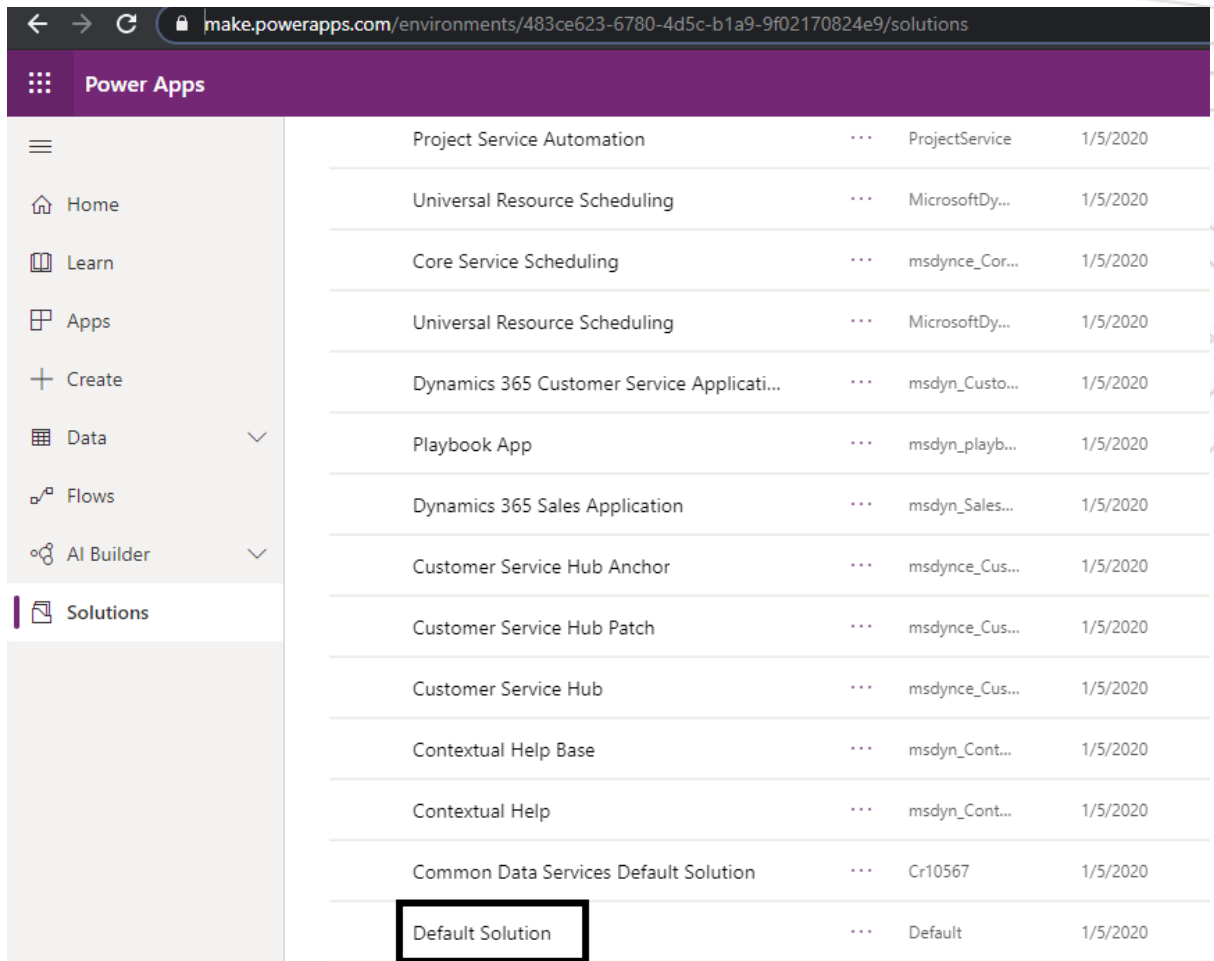
The main objective of this, CRM end-users need to upload multiple files into CRM using browse or Drag & Drop files. Because many times users try to import multiple files into CRM but that time they upload files one by one. There is no way to upload multiple file. So, users spend more time to select one by one file. The multi-file uploader is the tool that will be designed to accomplish exactly the same.

## Follow The Steps for downloading and configuring the Multi files uploader:

1. Install Multi files uploader from Microsoft AppSource (<https://appsource.microsoft.com/>).
2. Now, Go to Power Apps (<https://make.powerapps.com/>). You can see multi file uploader Solution in solutions window.

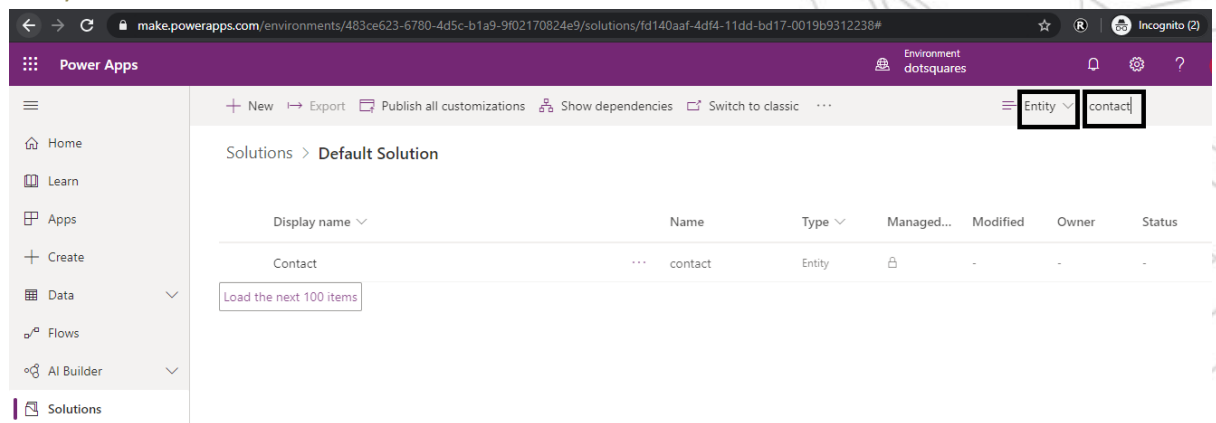


3. After install solution, go to your customize solution or default solution. Here, we take default solution.

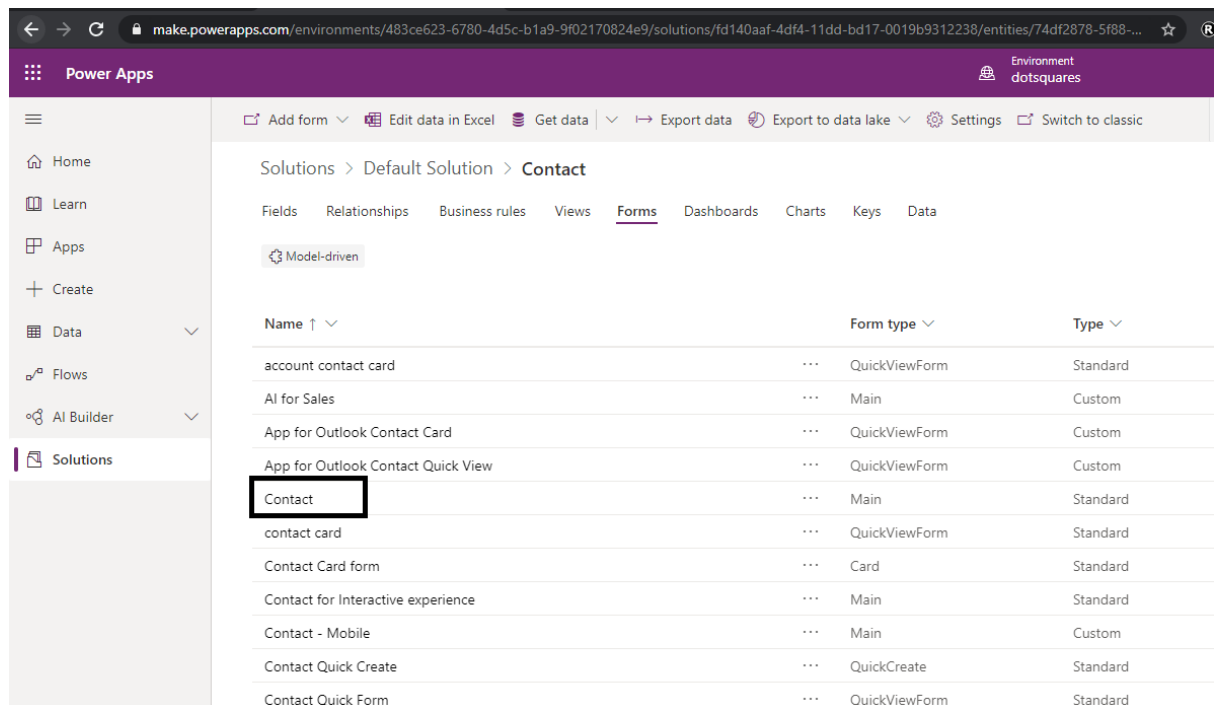


Power Apps				
☰	Project Service Automation	...	ProjectService	1/5/2020
🏠 Home	Universal Resource Scheduling	...	MicrosoftDy...	1/5/2020
📖 Learn	Core Service Scheduling	...	msdynce_Cor...	1/5/2020
📱 Apps	Universal Resource Scheduling	...	MicrosoftDy...	1/5/2020
✚ Create	Dynamics 365 Customer Service Applicati...	...	msdyn_Custo...	1/5/2020
📊 Data	Playbook App	...	msdyn_playb...	1/5/2020
📄 Flows	Dynamics 365 Sales Application	...	msdyn_Sales...	1/5/2020
🤖 AI Builder	Customer Service Hub Anchor	...	msdynce_Cus...	1/5/2020
📁 Solutions	Customer Service Hub Patch	...	msdynce_Cus...	1/5/2020
	Customer Service Hub	...	msdynce_Cus...	1/5/2020
	Contextual Help Base	...	msdyn_Cont...	1/5/2020
	Contextual Help	...	msdyn_Cont...	1/5/2020
	Common Data Services Default Solution	...	Cr10567	1/5/2020
	Default Solution	...	Default	1/5/2020

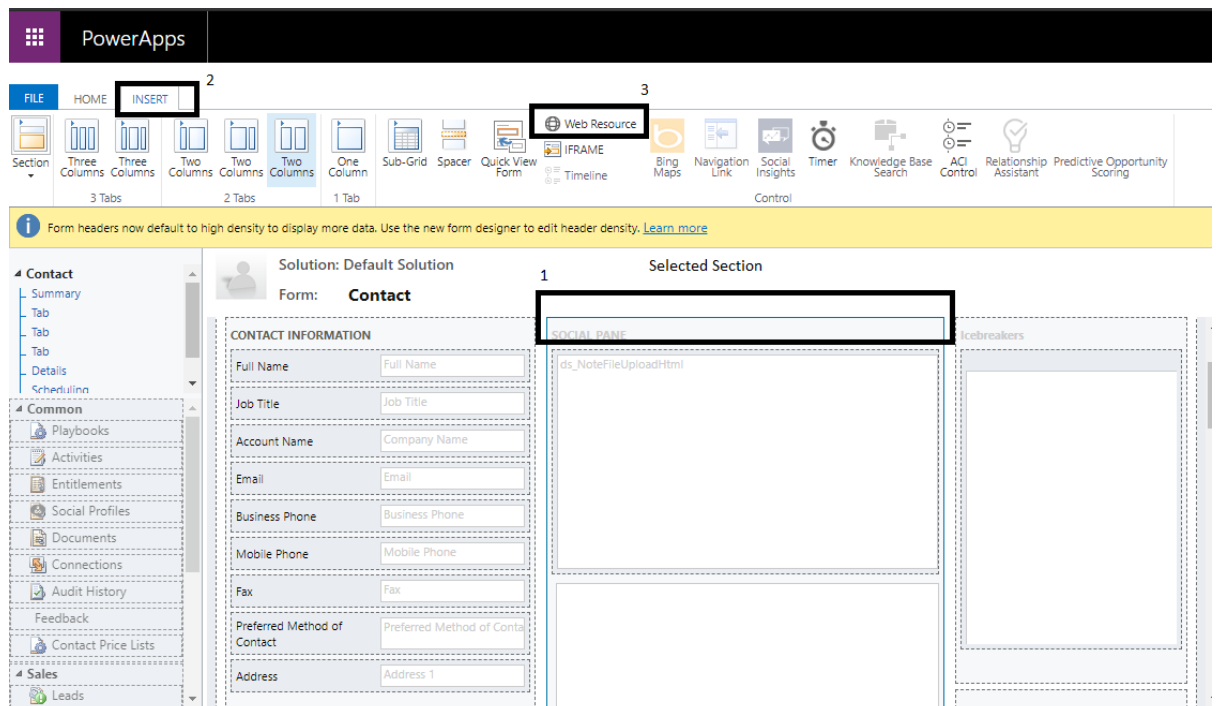
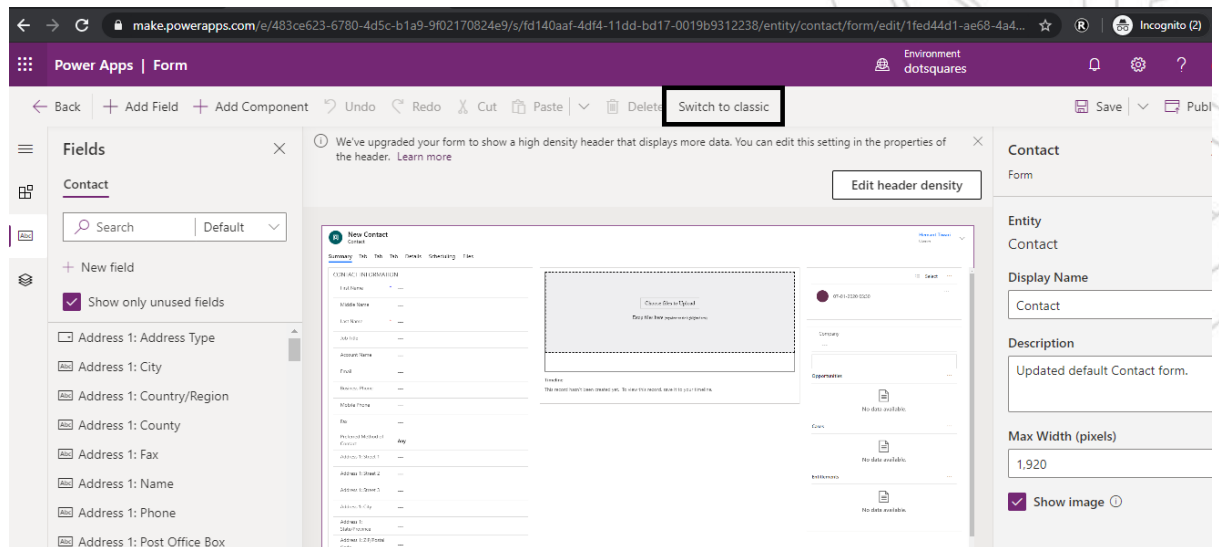
4. Open solution and Select entity where you want to add multi file uploader. For ex: **Contact** entity.



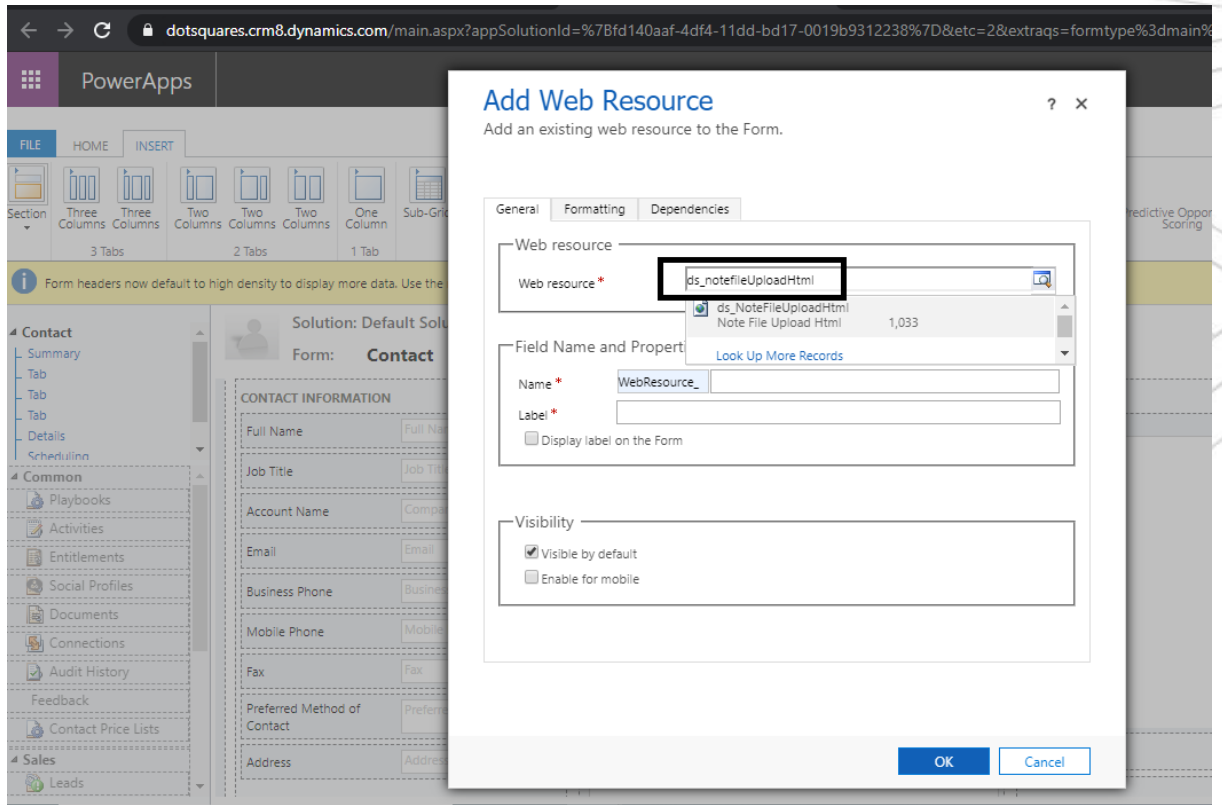
5. Go to Entity and open form. Here, we open Contact main form.



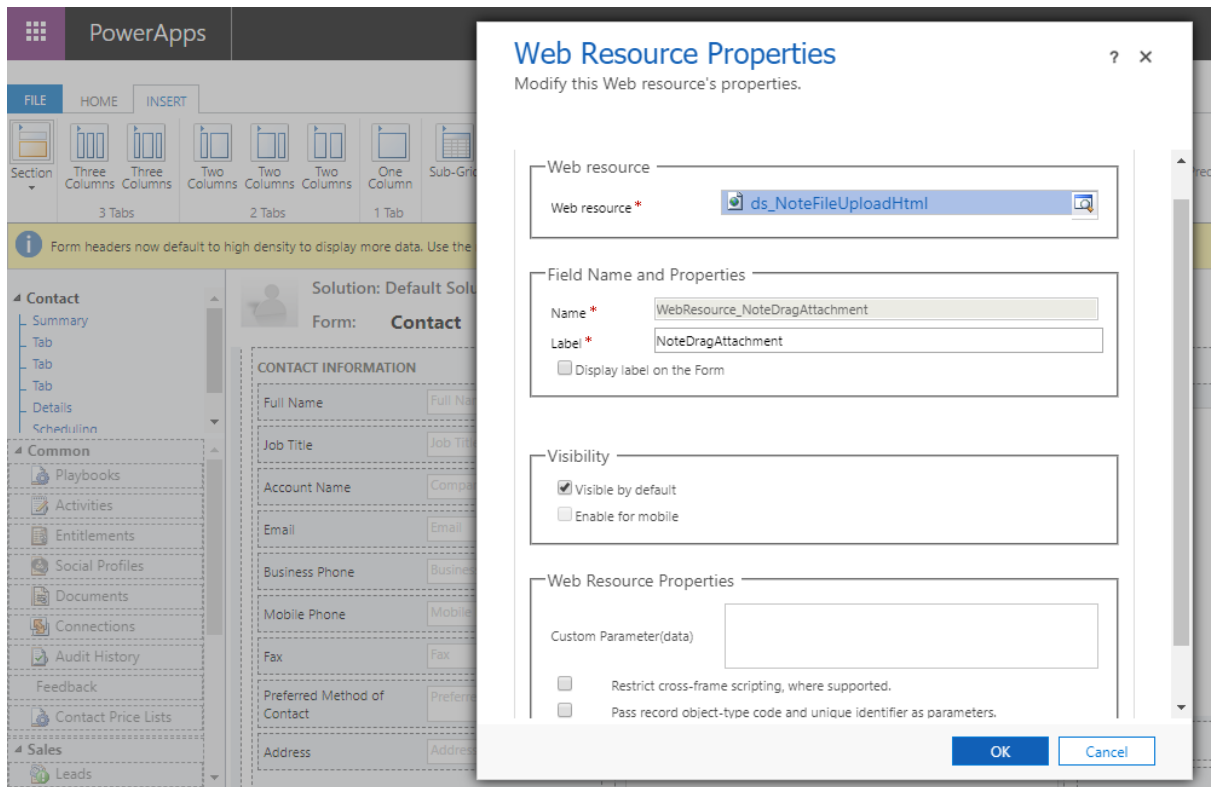
6. Now, Click on **Switch to classic** button for adds web resource into form. Select section or tab where you need to add Multi files uploader then click on insert top menu item and Select Web resource.



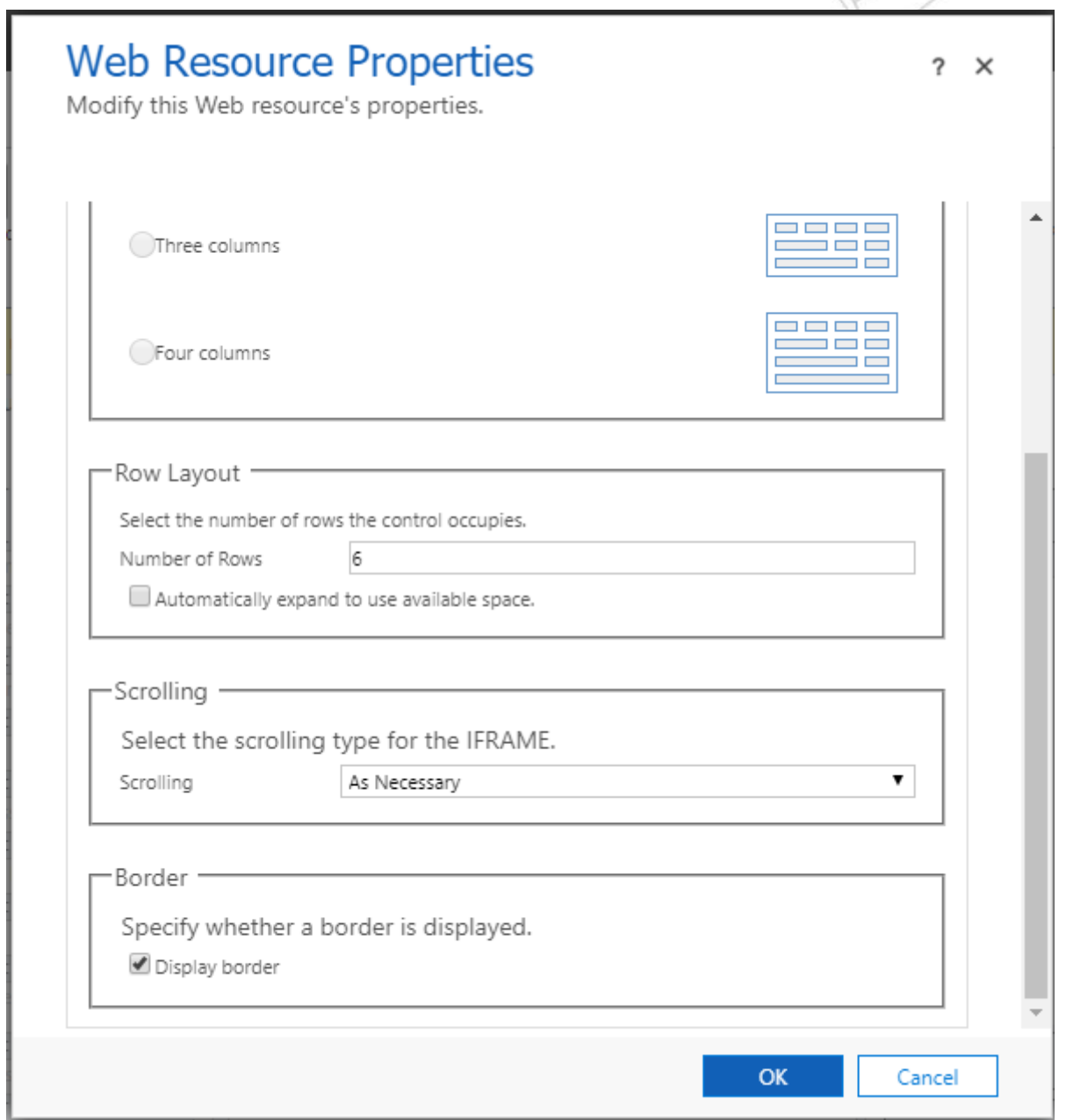
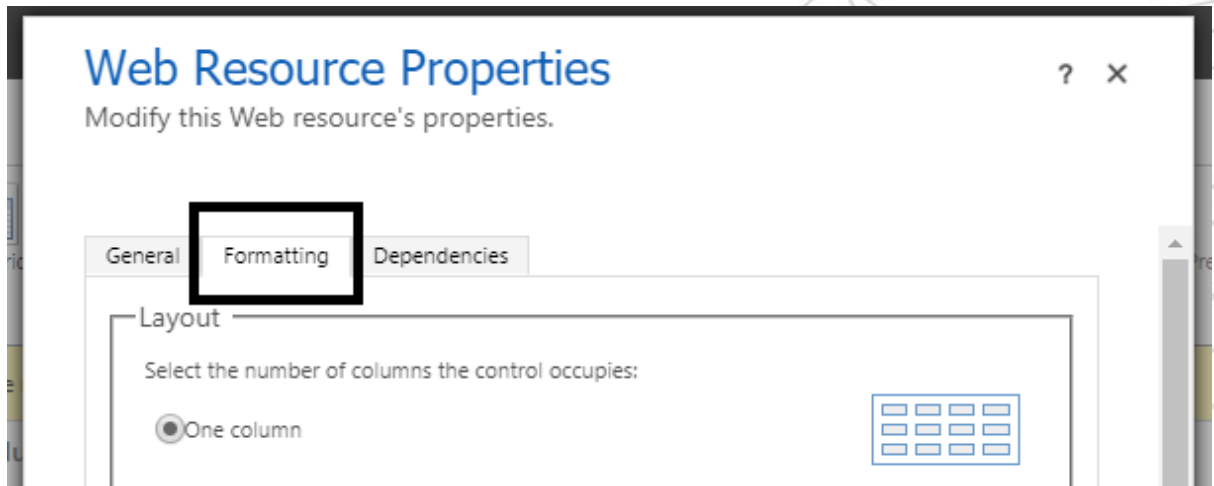
7. Now, find “ds\_notefileUploadHtml” into web resource html selector.



## 8. Fill other required textbox.

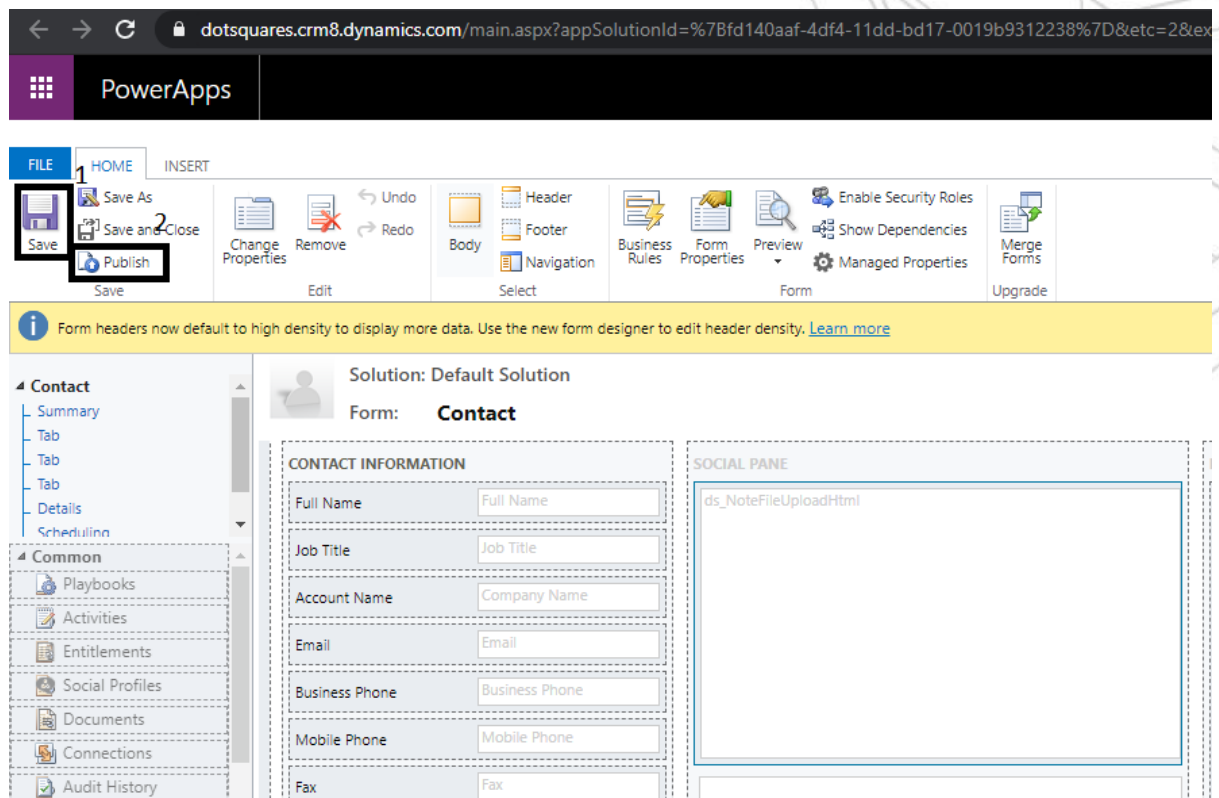


9. Click formatting tab and select those as shown image.

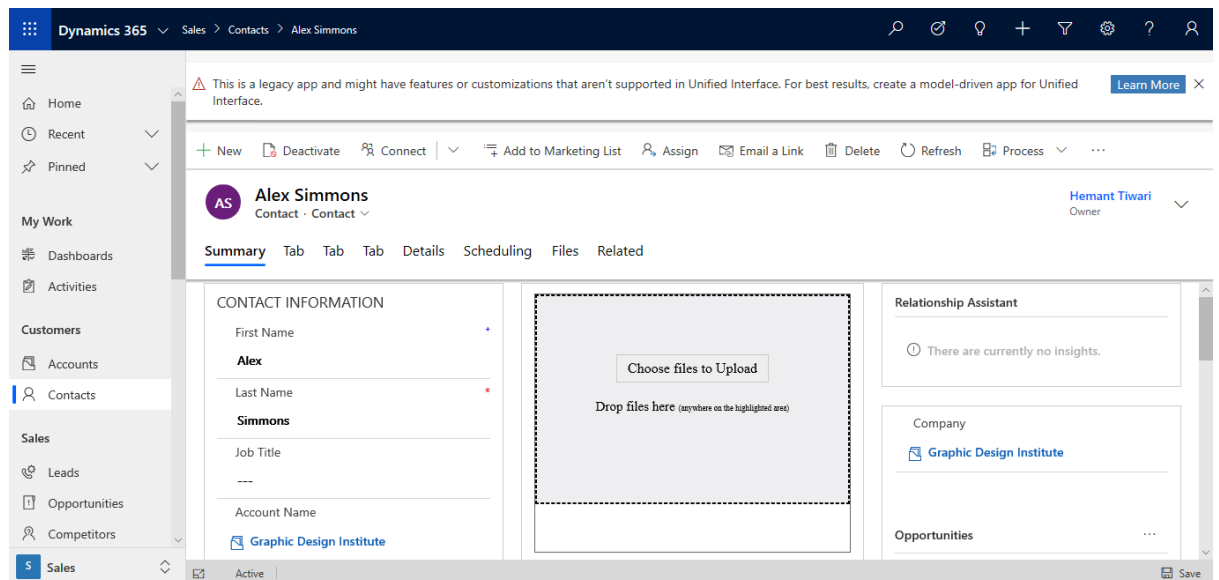


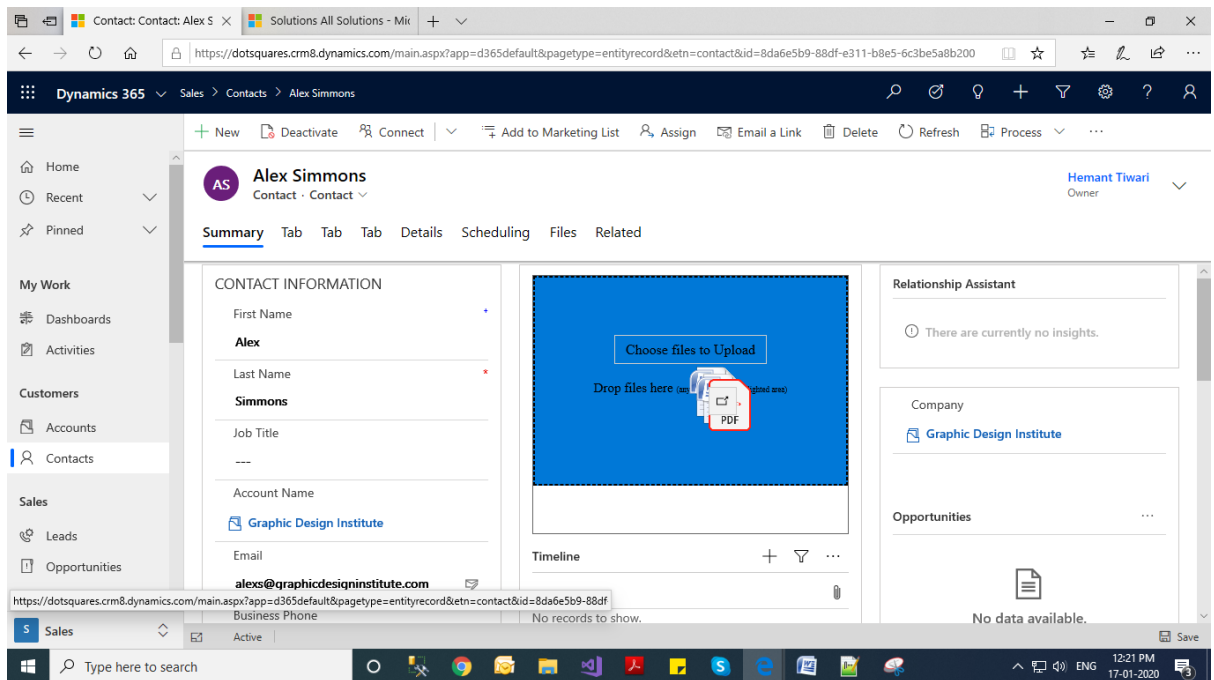
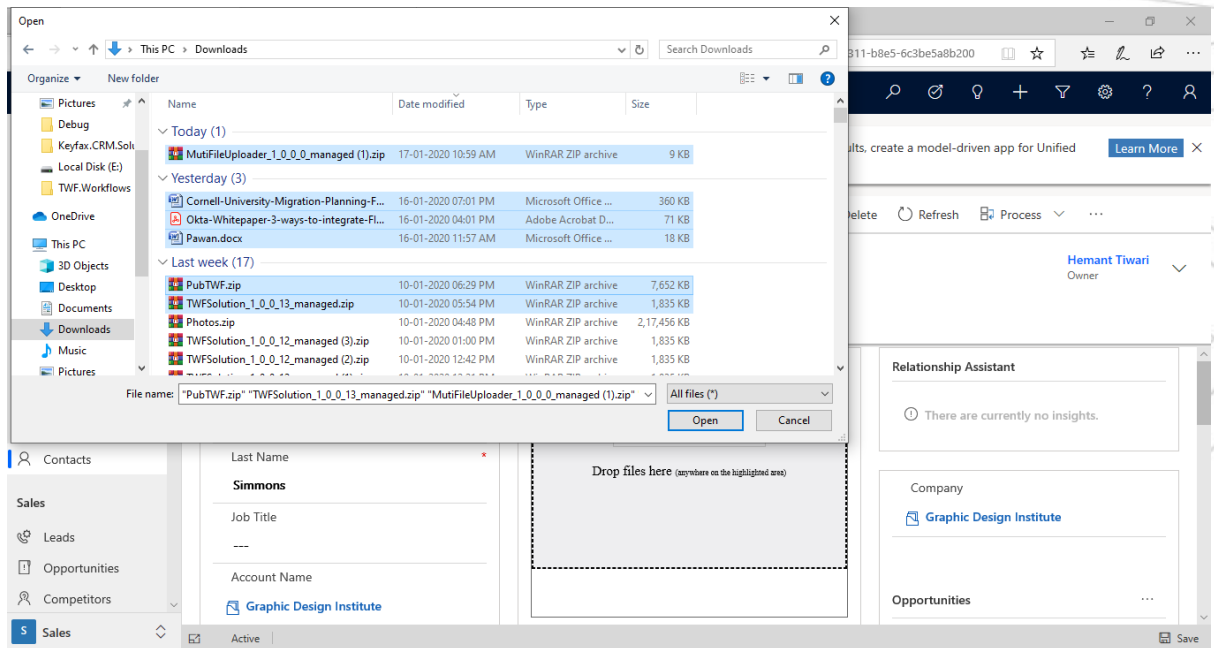


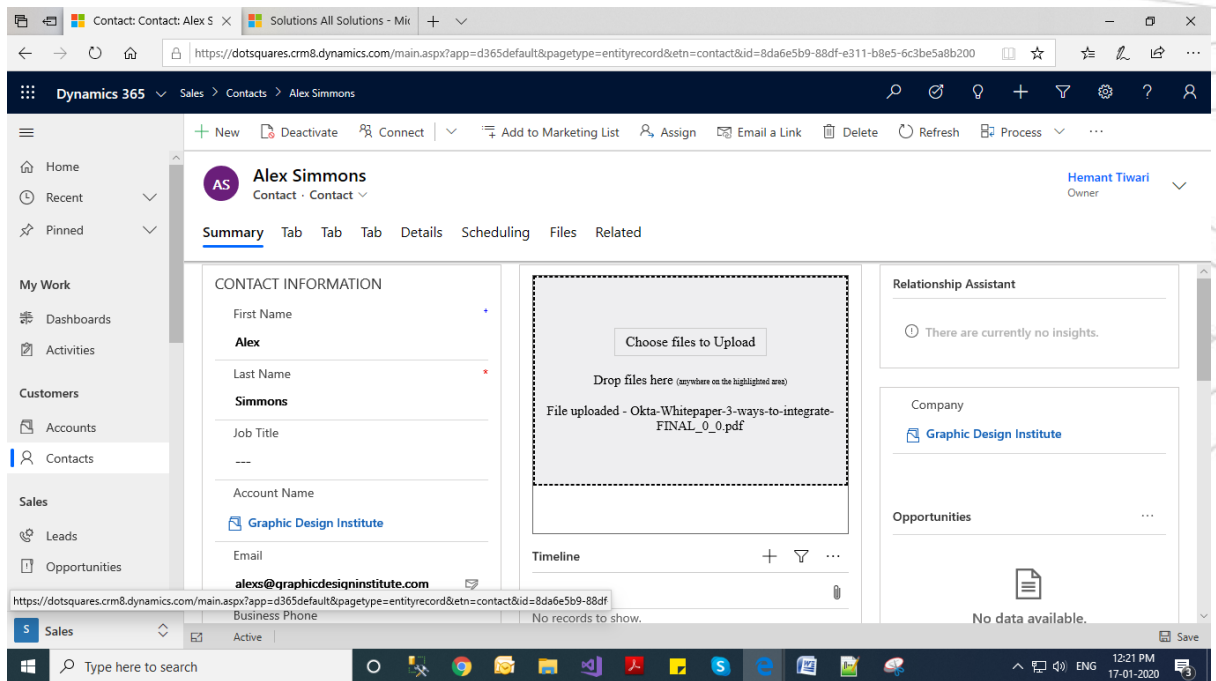
10. Hit ok and save form then click publish button.



11. Now, you can go to CRM and open any Contact where you need add notes. Just Browse or Drag and drop multiple files. So when all files imported successfully, then message shown as “File Uploaded”.

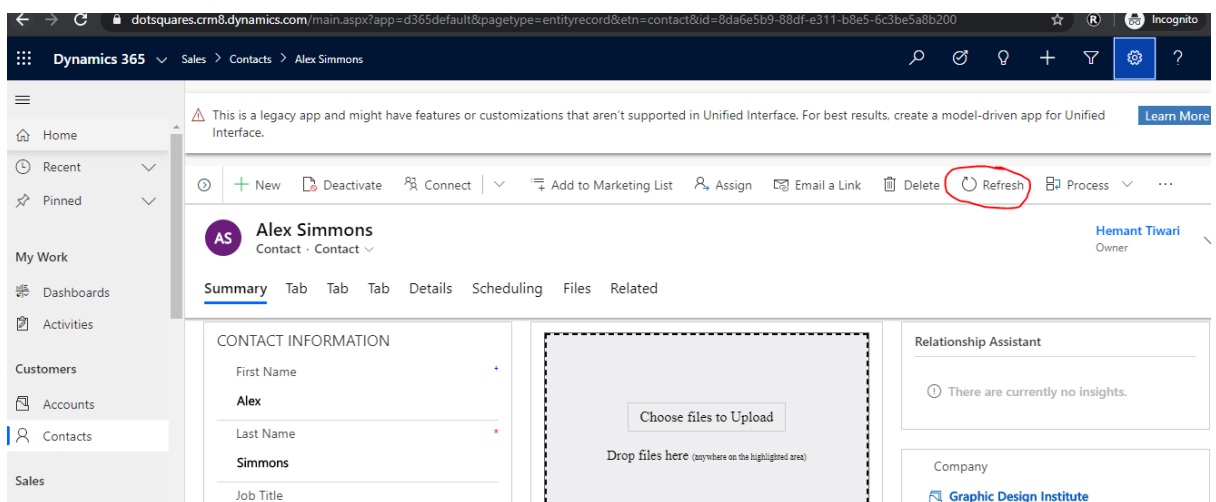




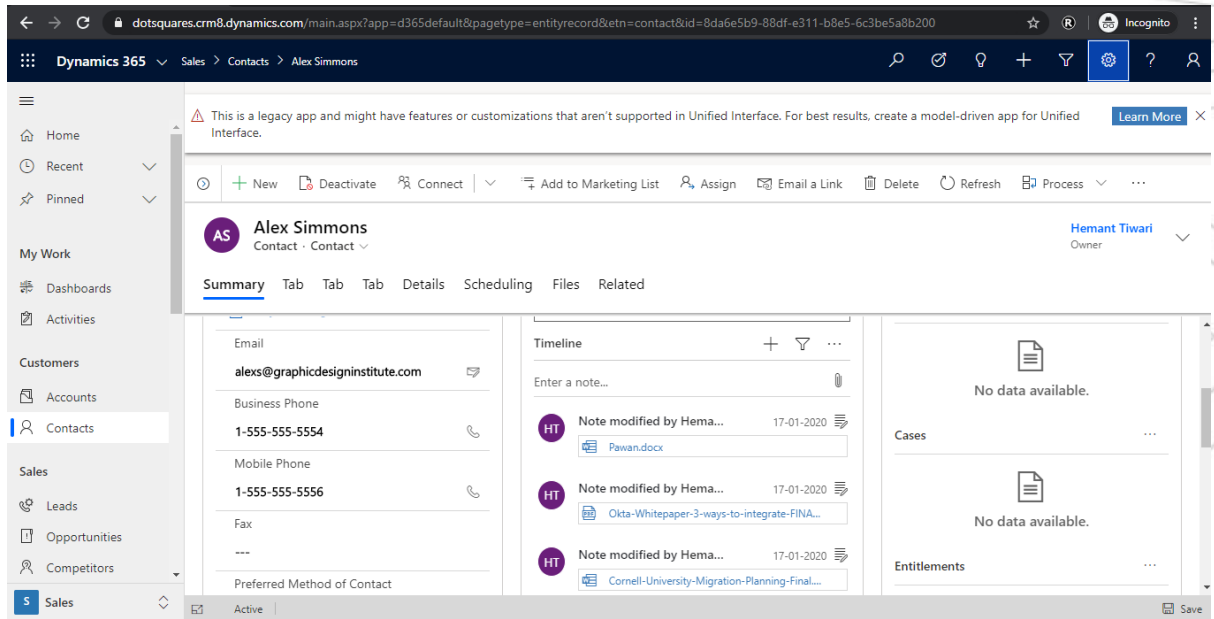


The screenshot shows the Dynamics 365 interface for a contact record named Alex Simmons. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, and Opportunities. The main area displays the contact's details under the 'Summary' tab, including First Name (Alex), Last Name (Simmons), Job Title, Account Name (Graphic Design Institute), and Email (alex@graphicdesigninstitute.com). A file upload area is visible with the text 'Choose files to Upload' and 'Drop files here (anywhere on the highlighted area)'. A file named 'Okta-Whitepaper-3-ways-to-integrate-FINAL\_0\_0.pdf' is shown as uploaded. The right sidebar shows the 'Relationship Assistant' section with a message 'There are currently no insights.' and a 'Company' section with the link 'Graphic Design Institute'. The bottom status bar shows 'No records to show.' and 'No data available.'

12. Now, you can see all imported files under notes section after refresh record.



The screenshot shows the same Dynamics 365 contact record for Alex Simmons. The 'Refresh' button in the top action bar is circled in red. A warning message at the top states: 'This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface. Learn More'. The contact information and file upload area are the same as in the previous screenshot. The right sidebar shows the 'Relationship Assistant' section with the message 'There are currently no insights.' and the 'Company' section with the link 'Graphic Design Institute'.



The screenshot displays the Microsoft Dynamics 365 CRM interface in a web browser. The address bar shows the URL: `dotsquares.crm8.dynamics.com/main.aspx?app=d365default&pagetype=entityrecord&etn=contact&id=8da6e5b9-88df-e311-b8e5-6c3be5a8b200`. The browser is Incognito mode.

The Dynamics 365 navigation pane on the left includes sections for Home, Recent, Pinned, My Work (Dashboards, Activities), Customers (Accounts, Contacts), and Sales (Leads, Opportunities, Competitors). The 'Contacts' section is currently selected.

The main content area displays the contact record for **Alex Simmons** (Contact - Contact). The owner is **Hemant Tiwari**. The record is viewed in the 'Summary' tab, with other tabs like 'Details', 'Scheduling', 'Files', and 'Related' available.

The contact details are organized into three main sections:

- Contact Information:**
  - Email: alexs@graphicdesigninstitute.com
  - Business Phone: 1-555-555-5554
  - Mobile Phone: 1-555-555-5556
  - Fax: ---
  - Preferred Method of Contact: (empty)
- Timeline:** A list of recent activities, all dated 17-01-2020, showing notes modified by Hema... with associated document links like Pawan.docx, Oltka-Whitepaper-3-ways-to-integrate-FINA..., and Cornell-University-Migration-Planning-Final....
- Related Records:** Sections for Cases, Entitlements, and other related entities, all currently showing 'No data available.'

The bottom status bar indicates the record is 'Active' and provides a 'Save' button.

## About Dotsquares

<https://www.dotsquares.com/technology/microsoft-net/microsoft-dynamics-crm/>

### **DOTSQUARES PROVIDE WEB DESIGN, DEVELOPMENT, HOSTING & DIGITAL MARKETING (SEO) SERVICES.**

Dotsquares head office is based in Albourne (near Brighton and Hove), United Kingdom with international offices in USA, Australia and has in-house development centres in Jaipur, India. We work very closely with all our clients, always looking to forge long term relationships, and offer offshore outsourcing services which reduce costs, enhance organisational flexibility and improve business and IT performance. By taking your IT project offshore you can take advantage of a fantastic price that will not be matched by onshore competitors and allows you to cut down on the costs whilst maintaining a quality that even onshore companies struggle to match. We take the pain out of your IT projects and let you concentrate on the business you know best: Your own. The idea behind Dotsquares was conceived in 2000, and the company was set up in Feb 2002. Dotsquares is a company dedicated to supplying IT services to businesses. Software development is not only highly technical, but also managerial. Our team members at our three Development Centres in Jaipur are fully accredited and have a minimum of five years commercial experience working with truly international clients. We ensure our development teams hold all the necessary accreditation such as Microsoft's and that our project managers are Project Management Institute (PMI) certified. To develop software requires time, skilled manpower, and expensive programs and equipment. We have the state-of-the-art infrastructure to make sure that any external factors don't influence the work of our team members & our clients get the fruits of the whole business model. Offshore software development is a cost effective alternative to developing software inhouse which allows business to cut the cost on the software development.

### **OUR PEOPLE, TECHNOLOGY AND PROCESSES**

Our exceptional staff of over 650 valued employees who are highly motivated to work at a successful company like Dotsquares. They are trained in technology and skilled in the English language to ensure we not only provide first class solutions but can communicate effectively with clients globally. Tried and tested processes ensure a smooth process from project initiation through to delivery and support.

### **OFFSHORE DEVELOPERS WITH UK OR US BASED PROJECT MANAGER**

Our web developers have over 5 years extensive experience of handling complex projects. Our developers have worked for more than 1000 clients all around the world, creating more than 2000 website applications for them. You can extend your in-house staff to our offshore development centre by hiring the services of dedicated developers. You can start with a single developer and scale-up to a full-fledged project team.