

User Guide



Multi-File Uploader

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Solution Version: 365.062017.2.4

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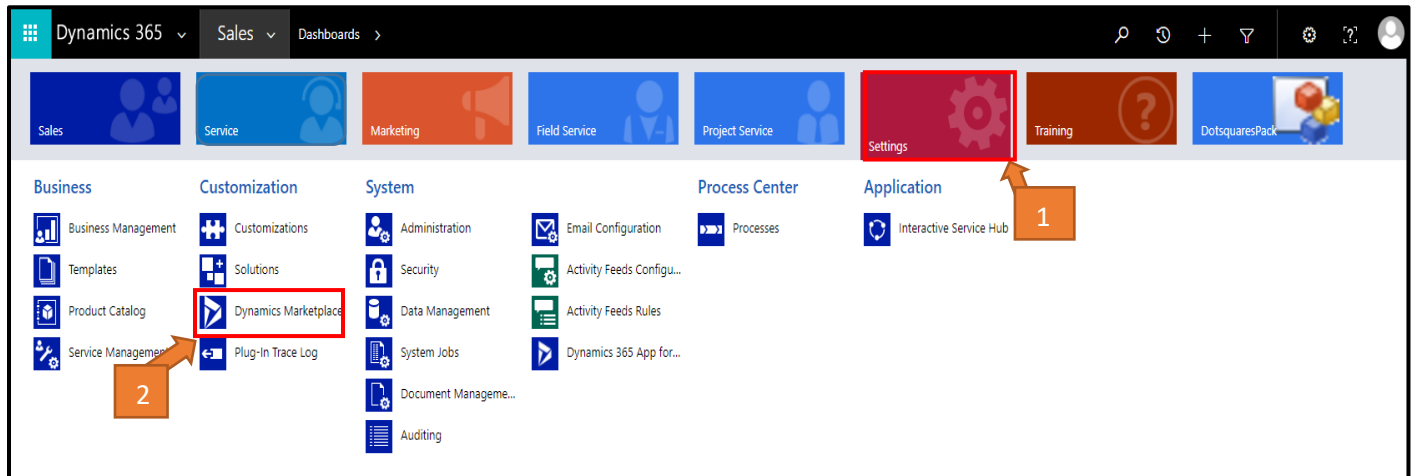
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How to Install Multi-File Uploader in your Dynamics 365?

To **Install** MTC's Multi-File Uploader add-on solution into your Dynamics 365, please follow the below instructions.

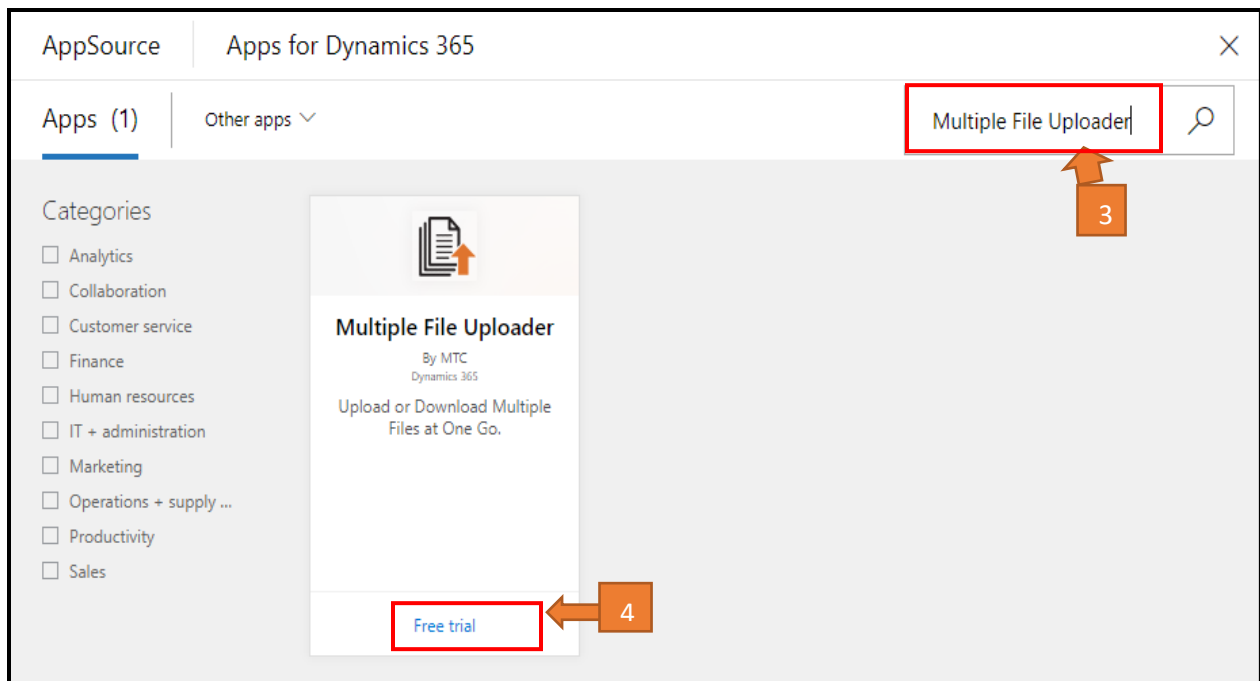
Step 1:

- Navigate to **Dynamics 365 -> Settings** and click on **Dynamics Marketplace**.



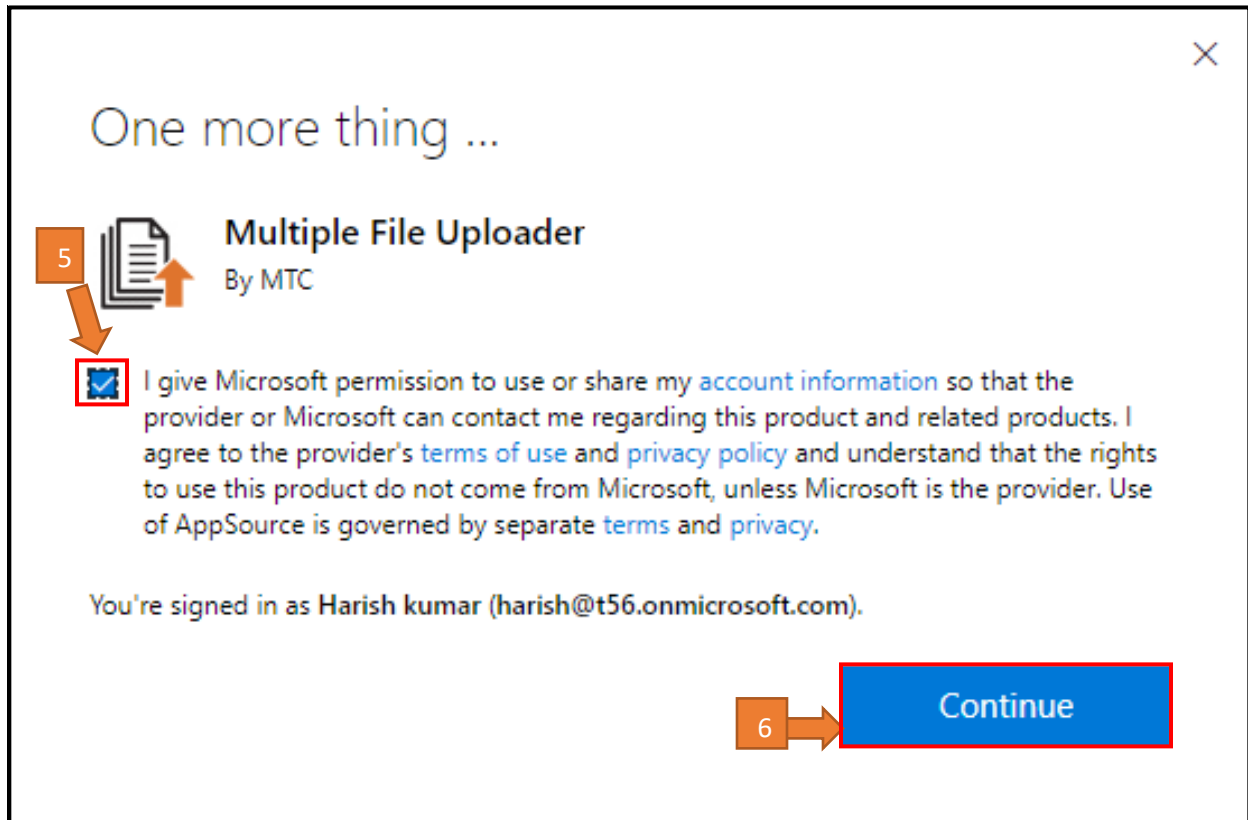
Step 2:

- In search box, search for **Multiple File Uploader** and click on **free trial**.



Step 3:

- Tick the **Check Box** to give permission and click on **Continue**.



Step 4:

- Tick the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: MTC (orge03d5402)

☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

7

8

Agree

Cancel

Step 5:

- After clicking on agree the **Installation Process Begins**.

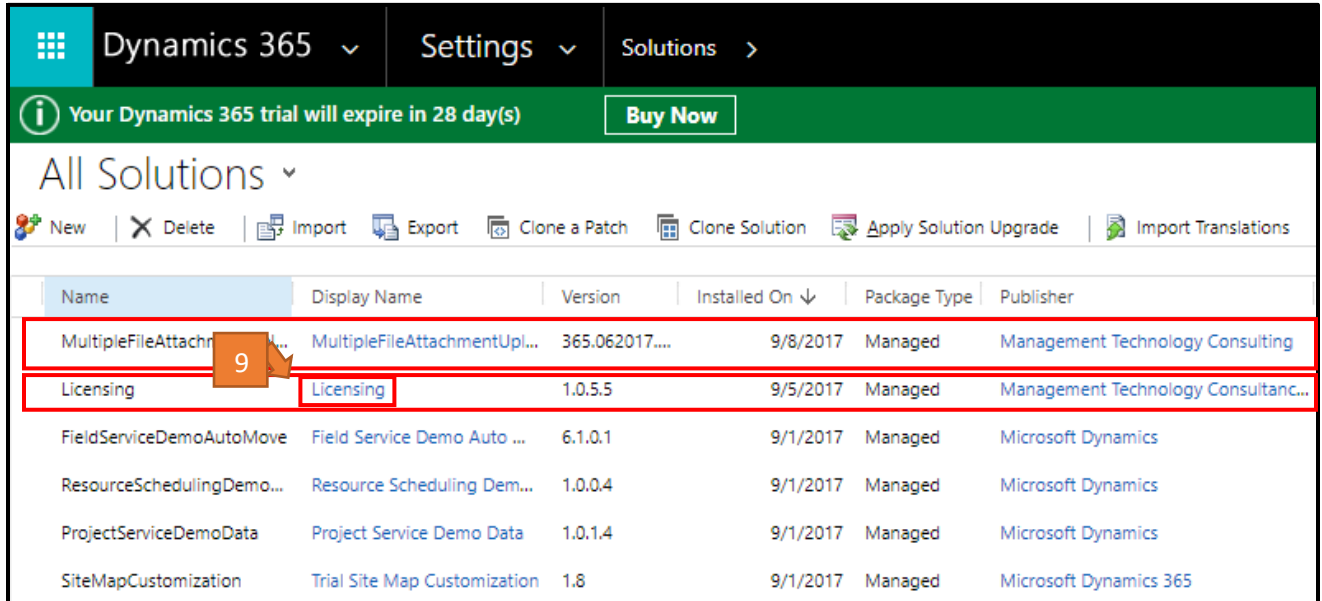
Manage your solutions

Select a preferred solution to manage on selected instance: MTC

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Live Assist for Microsoft D...	2.0.2.0	1/1/2050	Not installed
Live Assist for Microsoft D...	2.0.2.0	1/1/2050	Not installed
MS CRM Photo	365.72017.3.2	1/1/2050	Not installed
MultipleFileAttachmentUp...	365.62017.2.4	1/1/2050	Installation pending
Office 365 Groups	2.7.0.0	1/1/2050	Not installed
Project Service Automation	1.2.1.56	1/1/2050	Not installed
Voice of the Customer for ...	9.0.823.1	1/1/2050	Not installed

Step 6:

- After completing the installation, you will notice that **licensing solution** along with **Multiple File Uploader Solution** is being installed.
- To get the free trial Click on **licensing solution**.

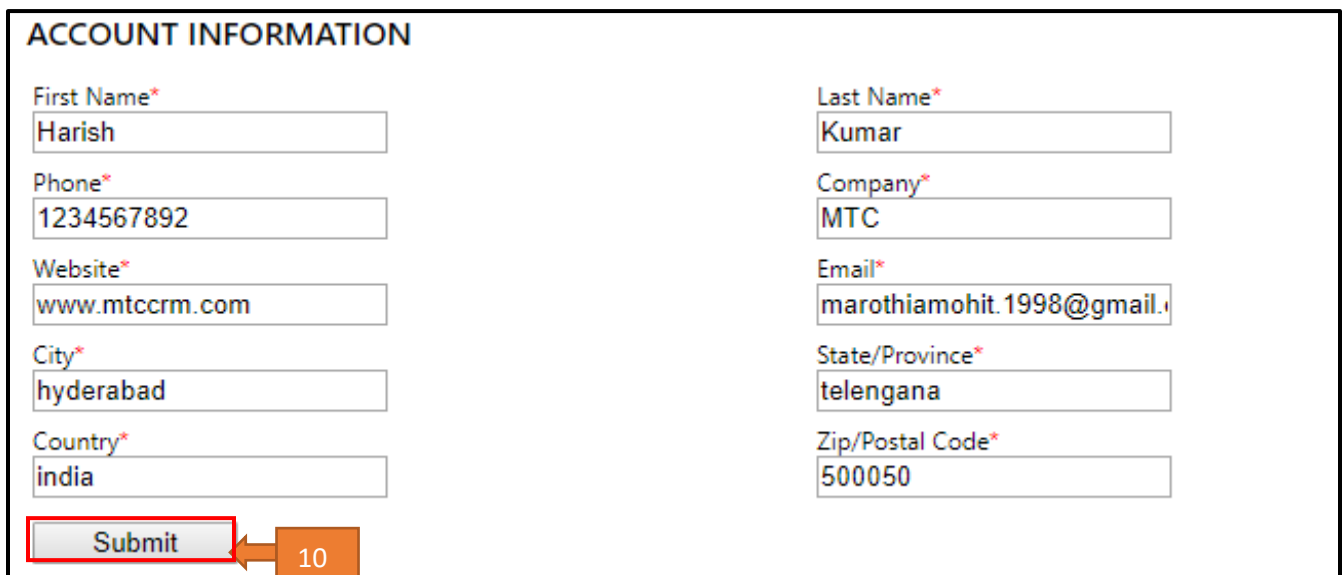


The screenshot shows the Dynamics 365 interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this, a green banner indicates 'Your Dynamics 365 trial will expire in 28 day(s)' with a 'Buy Now' button. The main section is titled 'All Solutions' and contains a table of installed solutions. A red box highlights the 'Licensing' solution, and an orange arrow labeled '9' points to it.

Name	Display Name	Version	Installed On	Package Type	Publisher
MultipleFileAttachment...	MultipleFileAttachmentUpl...	365.062017....	9/8/2017	Managed	Management Technology Consulting
Licensing	Licensing	1.0.5.5	9/5/2017	Managed	Management Technology Consultanc...
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	9/1/2017	Managed	Microsoft Dynamics
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	9/1/2017	Managed	Microsoft Dynamics
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	9/1/2017	Managed	Microsoft Dynamics
SiteMapCustomization	Trial Site Map Customization	1.8	9/1/2017	Managed	Microsoft Dynamics 365

Step 7:

- You will be redirected to Account Registration window.
- Fill in all fields (All fields are mandatory) as shown below and click on **submit**. "This will be a onetime activity."



The screenshot shows the 'ACCOUNT INFORMATION' form. It contains several text input fields for personal and company details. A red box highlights the 'Submit' button, and an orange arrow labeled '10' points to it.

First Name*	Last Name*
<input type="text" value="Harish"/>	<input type="text" value="Kumar"/>
Phone*	Company*
<input type="text" value="1234567892"/>	<input type="text" value="MTC"/>
Website*	Email*
<input type="text" value="www.mtccrm.com"/>	<input type="text" value="marothiamohit.1998@gmail."/>
City*	State/Province*
<input type="text" value="hyderabad"/>	<input type="text" value="telengana"/>
Country*	Zip/Postal Code*
<input type="text" value="india"/>	<input type="text" value="500050"/>
<input type="button" value="Submit"/>	

Step 8:

- After submitting the registration details, the window refreshes automatically and loads up all MTC products and you can find **MultiFile Uploader** as **Installed**.

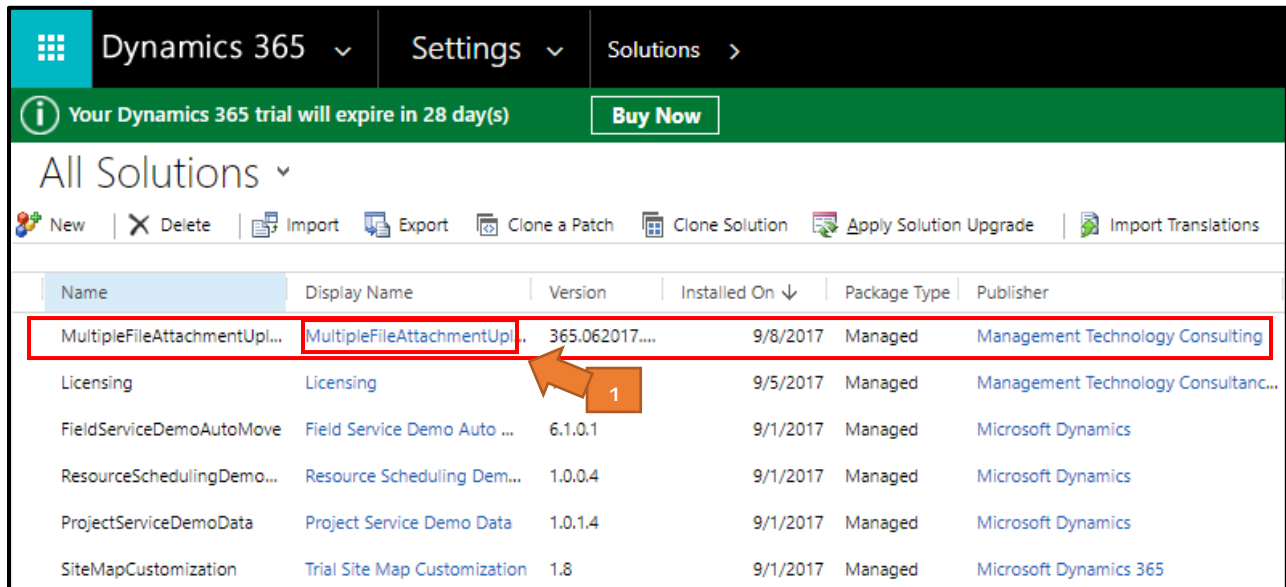
Products	Expiry Date	No of Users			
Coffee Sender			Get it Now		
Address Search			Get it Now		
Attachment to Sharepoint			Get it Now		
Calendar Pro			Get it Now		
Capture Image			Get it Now		
CRM Data Validation Tool			Get it Now		
MultiFile Uploader			Installed	Purchase License	Update License
Customer Survey			Get it Now		
Template To PDF			Get it Now		
Editable Grid Pro			Get it Now		

Note: The free trial license is generated and updated automatically on the first use of the product.

How to Configure Multi-File Uploader in your Dynamics 365?

Step 1:

- Navigate to **Dynamics365 -> Settings -> Solutions**. You will find **MultipleFileAttachmentUpload** solution. Click on it.

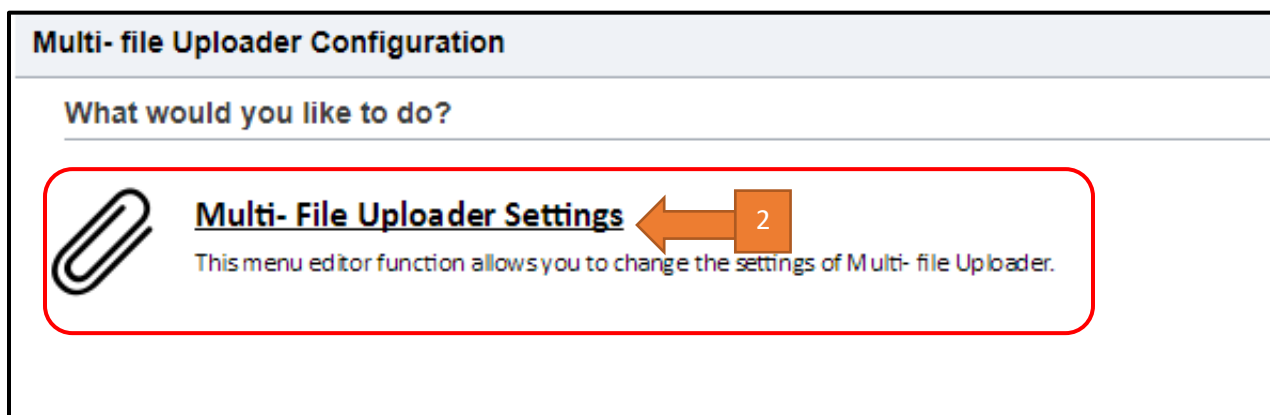


The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. A table lists installed solutions. The first row, 'MultipleFileAttachmentUpload', is highlighted with a red box and an orange arrow labeled '1' pointing to it.

Name	Display Name	Version	Installed On	Package Type	Publisher
MultipleFileAttachmentUpload	MultipleFileAttachmentUpload	365.062017....	9/8/2017	Managed	Management Technology Consulting
Licensing	Licensing		9/5/2017	Managed	Management Technology Consulting
FieldServiceDemoAutoMove	Field Service Demo Auto Move	6.1.0.1	9/1/2017	Managed	Microsoft Dynamics
ResourceSchedulingDemo	Resource Scheduling Demo	1.0.0.4	9/1/2017	Managed	Microsoft Dynamics
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	9/1/2017	Managed	Microsoft Dynamics
SiteMapCustomization	Trial Site Map Customization	1.8	9/1/2017	Managed	Microsoft Dynamics 365

Step 2:

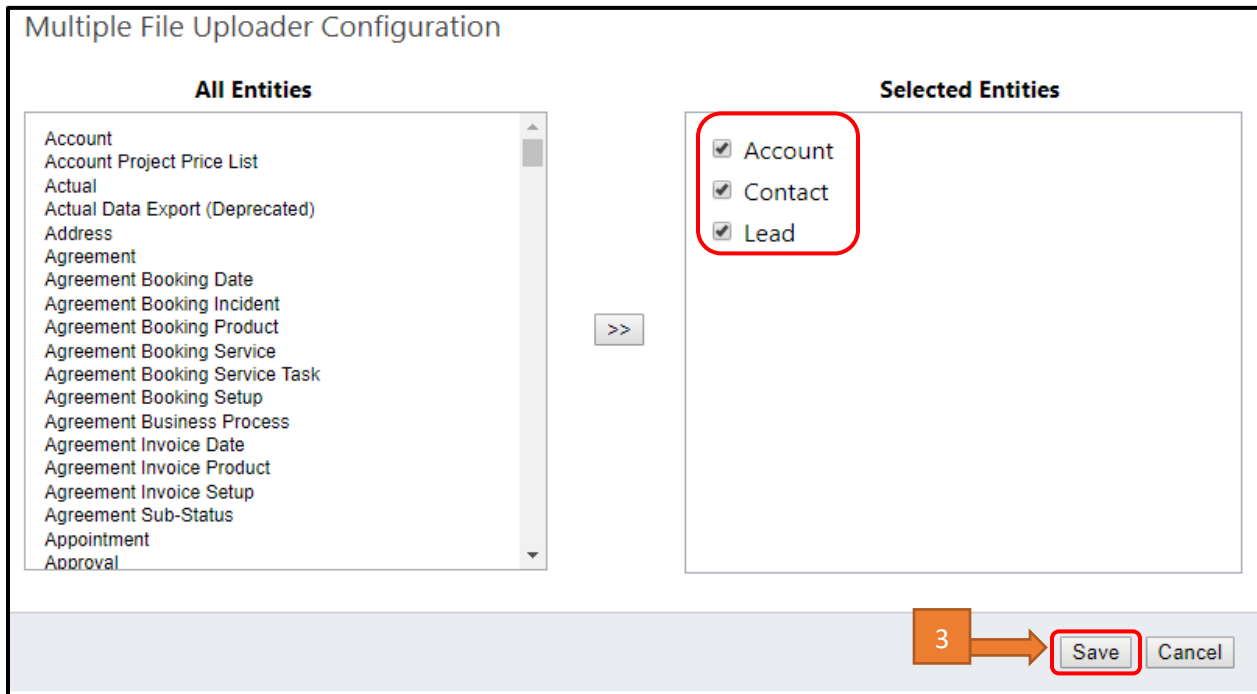
- You will be redirected to Multi-File Uploader Configuration window.
- Click on **Multi-File Uploader Settings**.



The screenshot shows the 'Multi- file Uploader Configuration' window. Under the heading 'What would you like to do?', there is a button labeled 'Multi- File Uploader Settings' with a paperclip icon. An orange arrow labeled '2' points to this button. Below the button, a text box states: 'This menu editor function allows you to change the settings of Multi- file Uploader.'

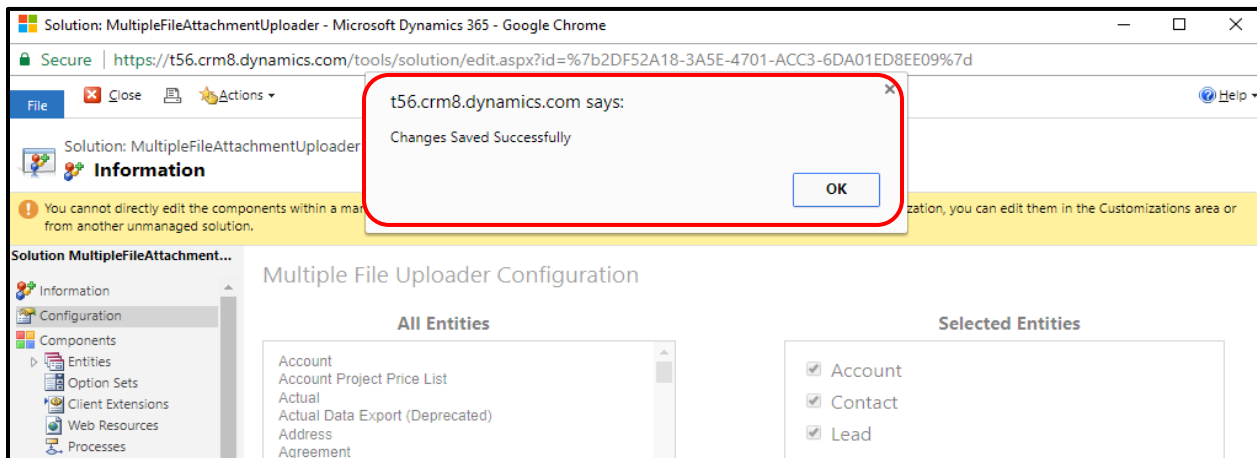
Step 3:

- You will be redirected to Multi-File Uploader Configuration page.
- Select one or more Entities from All Entities and click on double arrow >> button to move these entities to **Selected Entities** or you can double click on entities to move to the Selected Entities.
- After checking the Selected Entities checkboxes click on **save** button



Step4:

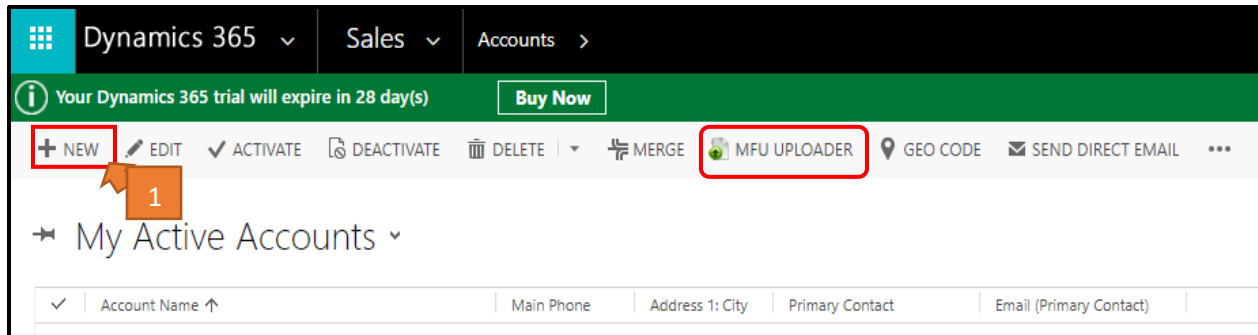
- After clicking on save button, **Changes Saved Successfully** popup message will come.



Multi-File Uploader Functionality

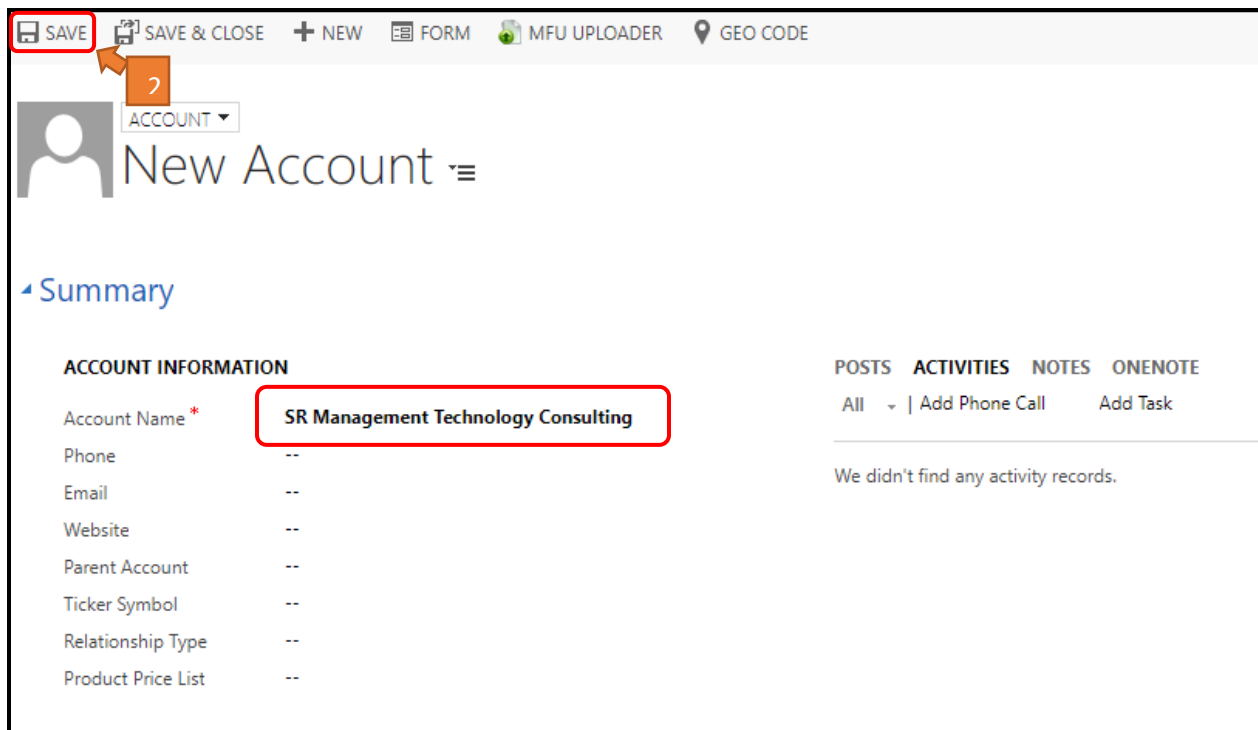
Step 1:

- Navigate to **Dynamic 365**, click on **Sales** and select **Accounts**.
- Now you can find **MFU UPLOADER** button on ribbon area.
- To Create **New Account** click on **NEW**



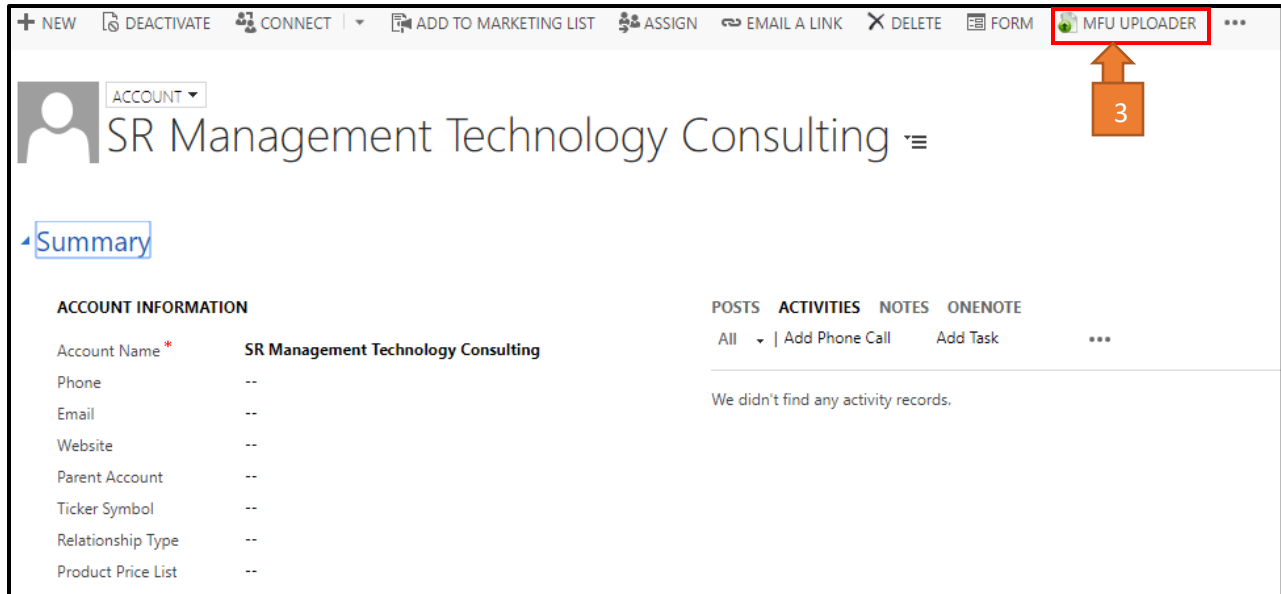
Step 2:

- Fill the **Account** details and **Save** it.



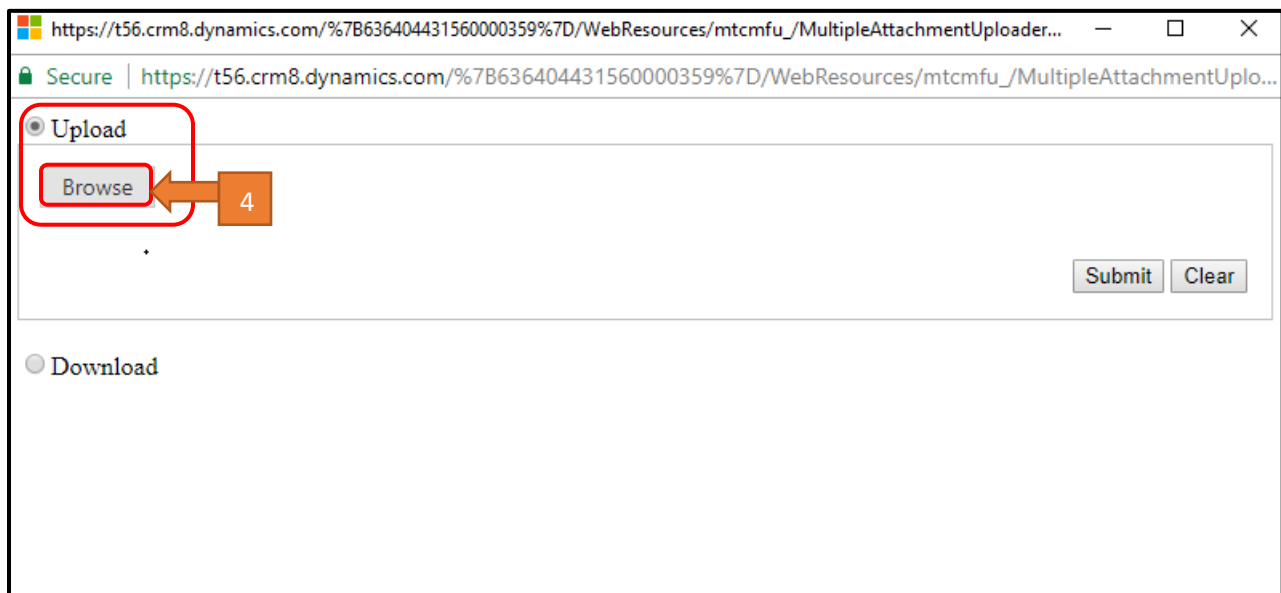
Step 3:

- Now you can click on **MFU UPLOADER** for uploading/downloading multiple files.



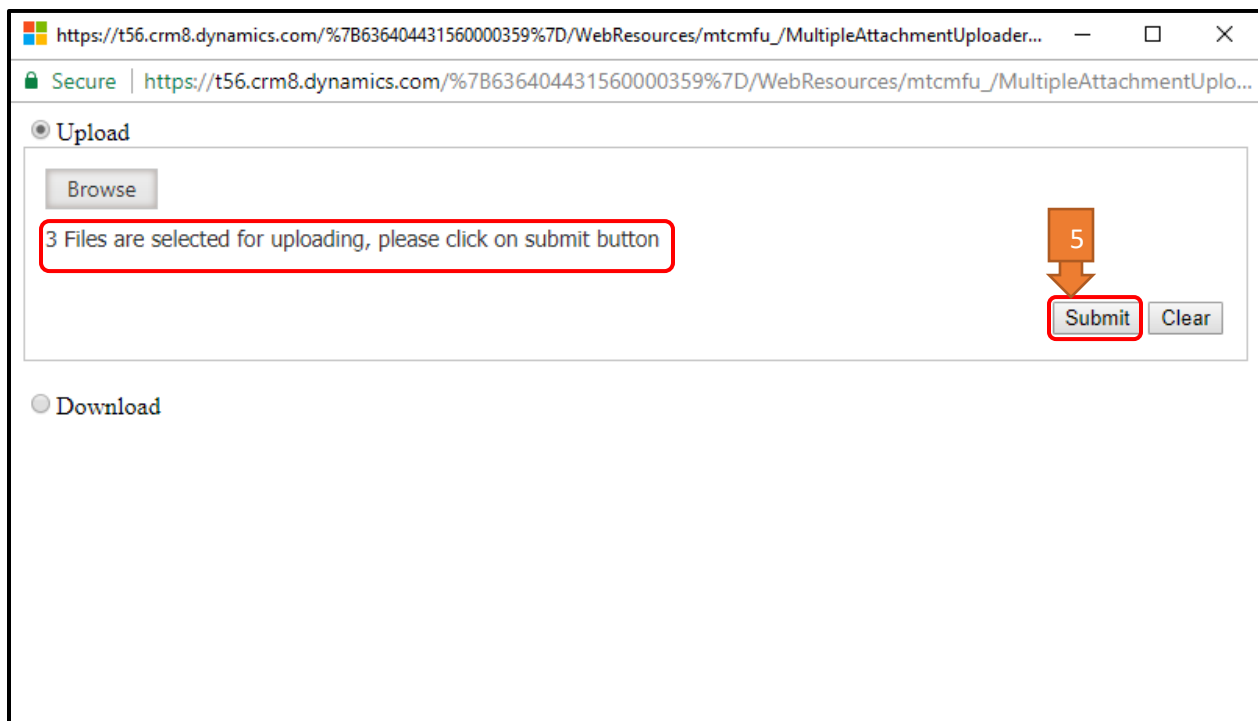
Step 4:

- A window pops up as shown below. Select Upload option and click on **Browse** to select multiple files for uploading to this account.



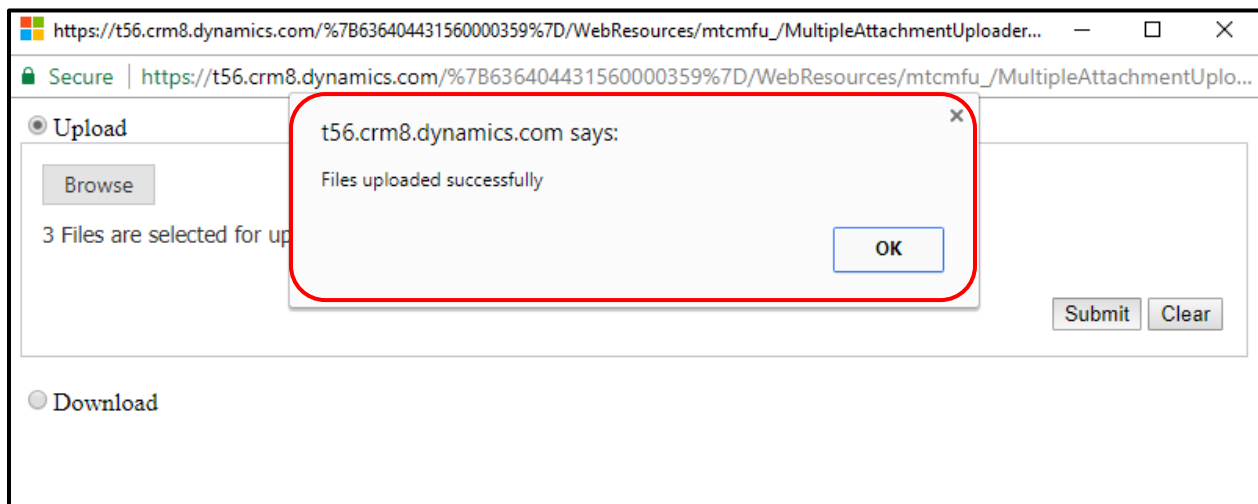
Step 5:

- Now you can see **multiple selected files are ready to be uploaded**. Click on **Submit** button.



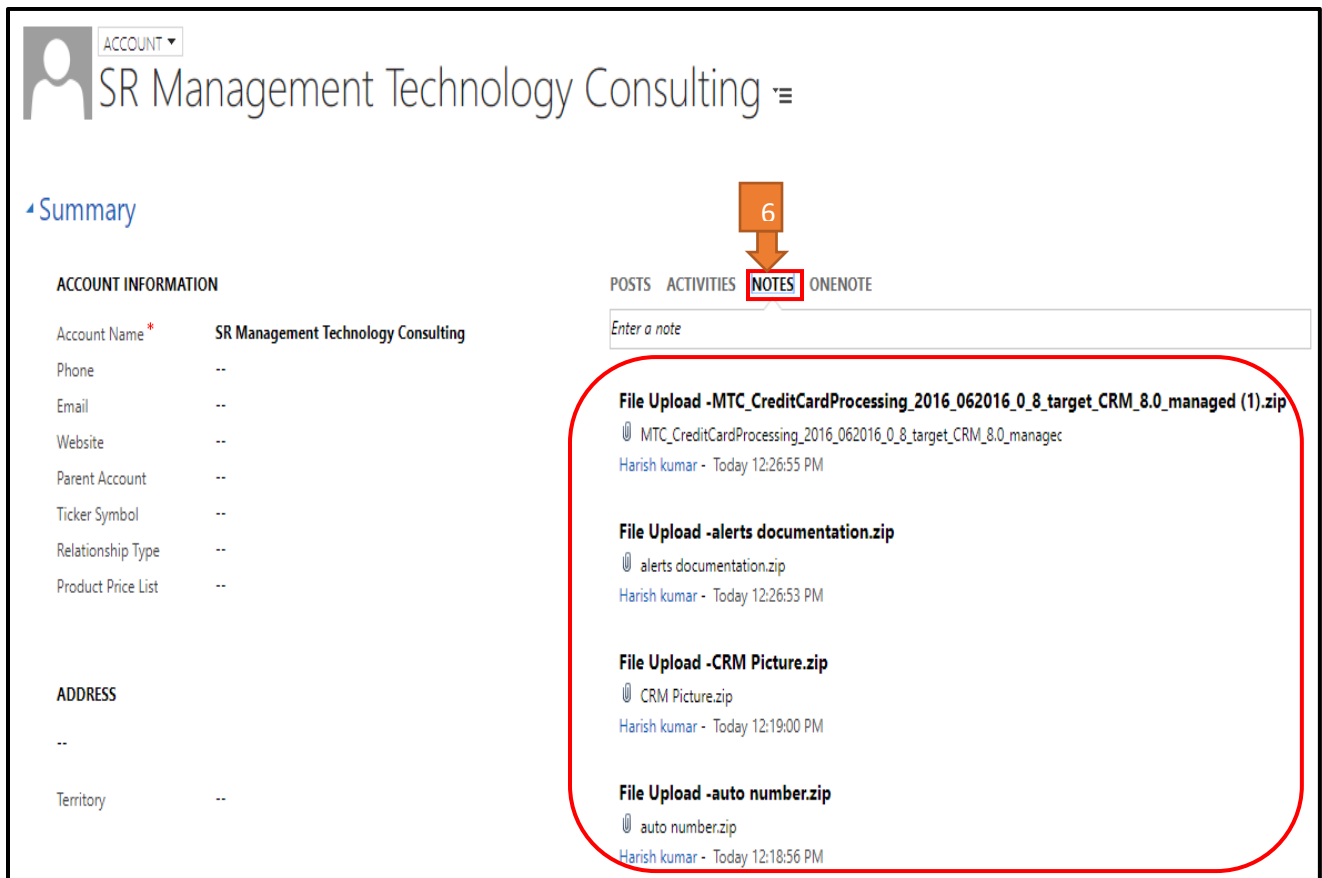
Step 6:

- After clicking on submit. **Files uploaded successfully** pop-up message will appear.



Step 7:

- To review the files uploaded you can navigate to Account record and click on **NOTES**.



ACCOUNT

SR Management Technology Consulting

Summary

ACCOUNT INFORMATION

Account Name *	SR Management Technology Consulting
Phone	--
Email	--
Website	--
Parent Account	--
Ticker Symbol	--
Relationship Type	--
Product Price List	--

ADDRESS

--

Territory

--

POSTS ACTIVITIES **NOTES** ONENOTE

Enter a note

File Upload -MTC_CreditCardProcessing_2016_062016_0_8_target_CRM_8.0_managed (1).zip
 MTC_CreditCardProcessing_2016_062016_0_8_target_CRM_8.0_managed
 Harish kumar - Today 12:26:55 PM

File Upload -alerts documentation.zip
 alerts documentation.zip
 Harish kumar - Today 12:26:53 PM

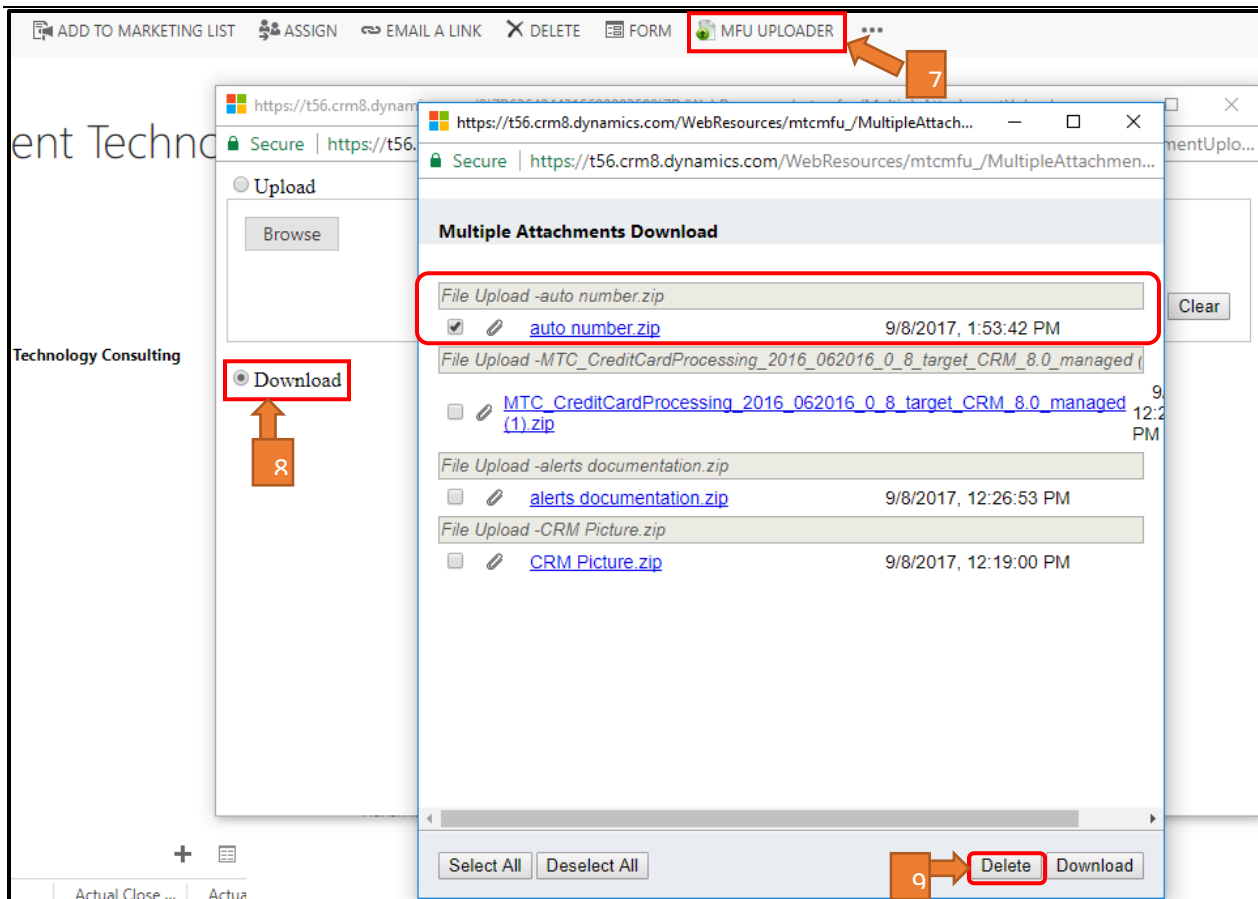
File Upload -CRM Picture.zip
 CRM Picture.zip
 Harish kumar - Today 12:19:00 PM

File Upload -auto number.zip
 auto number.zip
 Harish kumar - Today 12:18:56 PM

How to Delete Files?

Step 8:

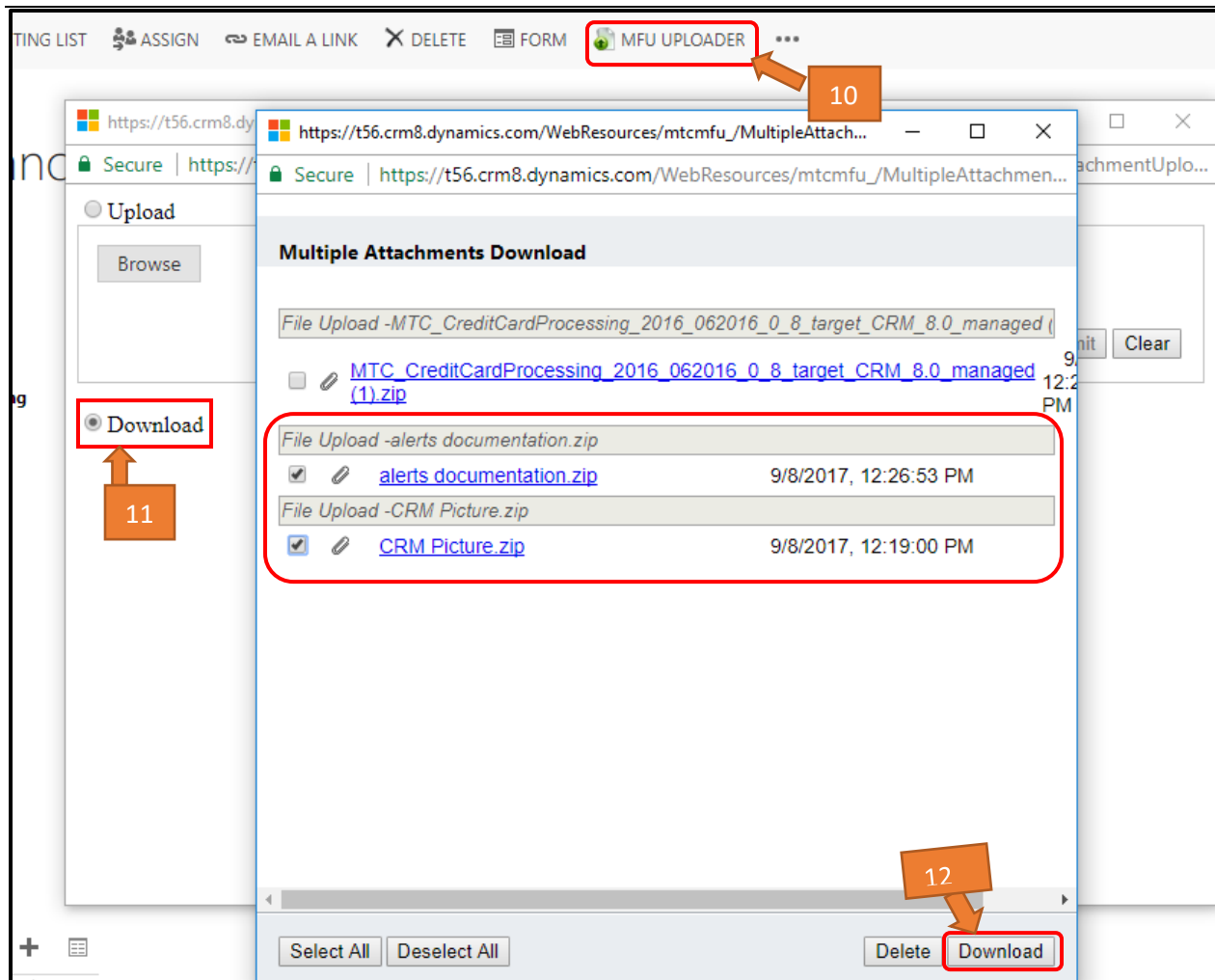
- To **Delete** any of the uploaded or previously present files click on **MFU UPLOADER**.
- A window appears as shown below. Select **Download** option.
- Another window appears with all uploaded files. Select files which you want to **Delete**.
- Click on **Delete**.



How to Download Multiple Files?

Step 10:

- To **Download** multiple files, click on **MFU UPLOADER**.
- A window appears as shown below. Select **Download** option.
- Another window appears with all existing files. Select files which you want to **Download**.
- Click on **Download**.



Step 11:

- Files thus **Downloaded** can be found in your Downloads Folder.



https://t56.crm8.dynamics.com/WebResources/mtcmfu/MultipleAttachmentUploader/Html/NotesAttachmentsDownload?data=27B40474-5394-E... — □ ×

Secure | https://t56.crm8.dynamics.com/WebResources/mtcmfu/MultipleAttachmentUploader/Html/NotesAttachmentsDownload?data=27B40...

Multiple Attachments Download

File Upload -MTC_CreditCardProcessing_2016_062016_0_8_target_CRM_8.0_managed (1).zip		
<input type="checkbox"/>	MTC_CreditCardProcessing_2016_062016_0_8_target_CRM_8.0_managed (1).zip	9/8/2017, 12:26:55 PM
File Upload -alerts documentation.zip		
<input checked="" type="checkbox"/>	alerts documentation.zip	9/8/2017, 12:26:53 PM
File Upload -CRM Picture.zip		
<input checked="" type="checkbox"/>	CRM Picture.zip	9/8/2017, 12:19:00 PM

Select All Deselect All Delete Download

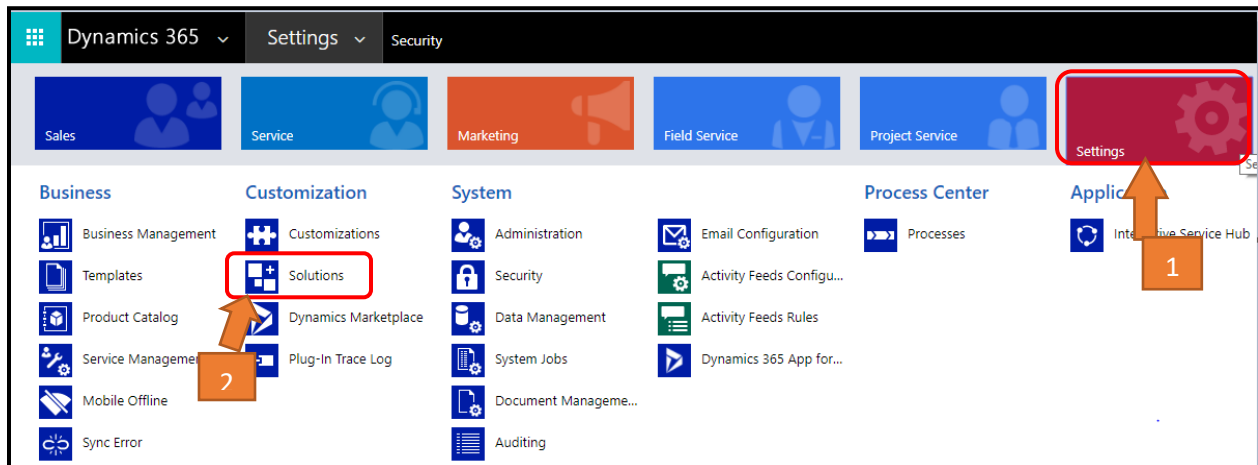
 CRM Picture.zip ^
  alerts documentati....zip ^

Show all ×

How to Uninstall Multi-File Uploader in your Dynamics 365?

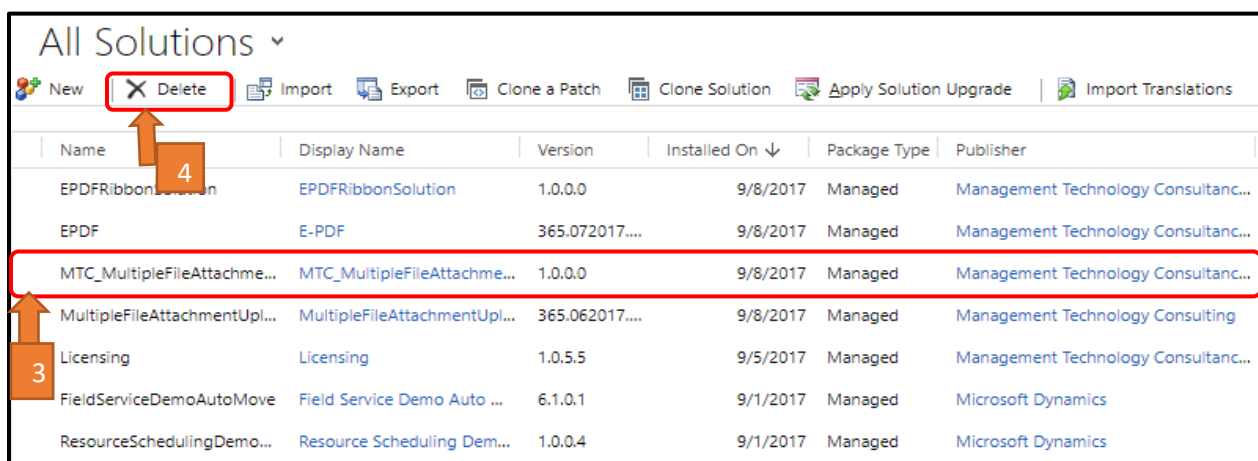
Step1:

- To Uninstall **Multiple File Uploader** Solution, navigate to **Dynamics 365 → Settings → Solution**.



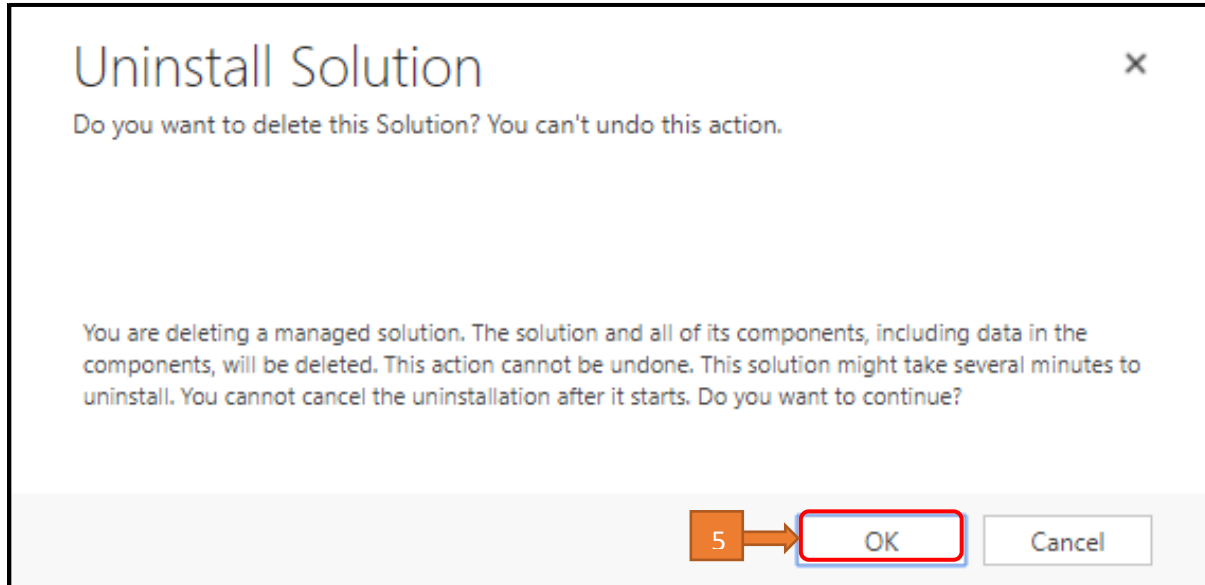
Step2:

- Upon Configuring the **Multiple File Uploader** settings will get **MTC_MultipleFileAttachmentUploader**. In order to delete the **Multiple File Uploader** first we need to delete **MTC_MultipleFileAttachmentUploader**.
- Select the solution and click on **Delete**.



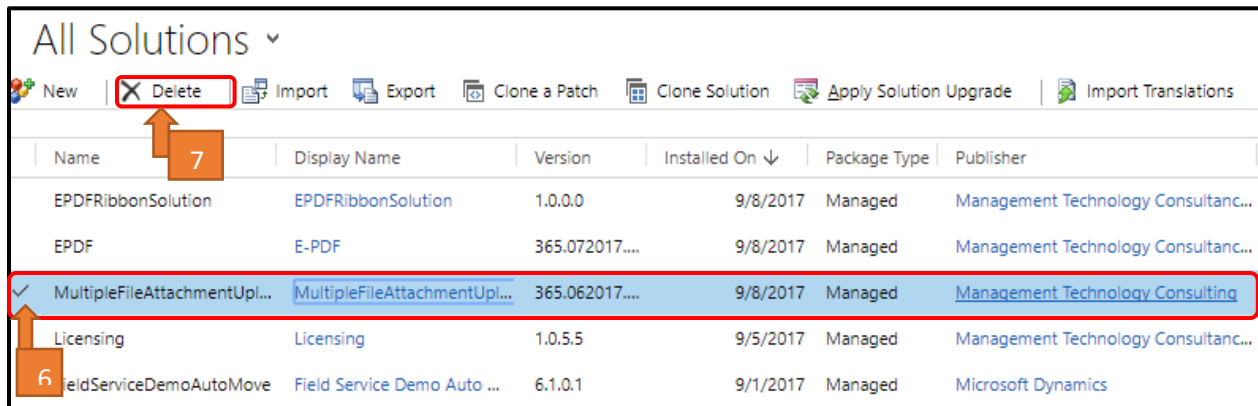
Step3:

- Click on **ok** to start uninstalling **MTC_MultipleFileAttachmentUploader**.



Step4:

- Click on **MultipleFileAttachmentUploader** and click on **Delete** to uninstall the **Multiple File Uploader**.



Step5:

- Click on **ok** to start uninstalling the **Multiple File Uploader**.

