User Guide

Multi-File Uploader

Document Version: 1.0

Solution Version: 365.062017.2.4

MTC

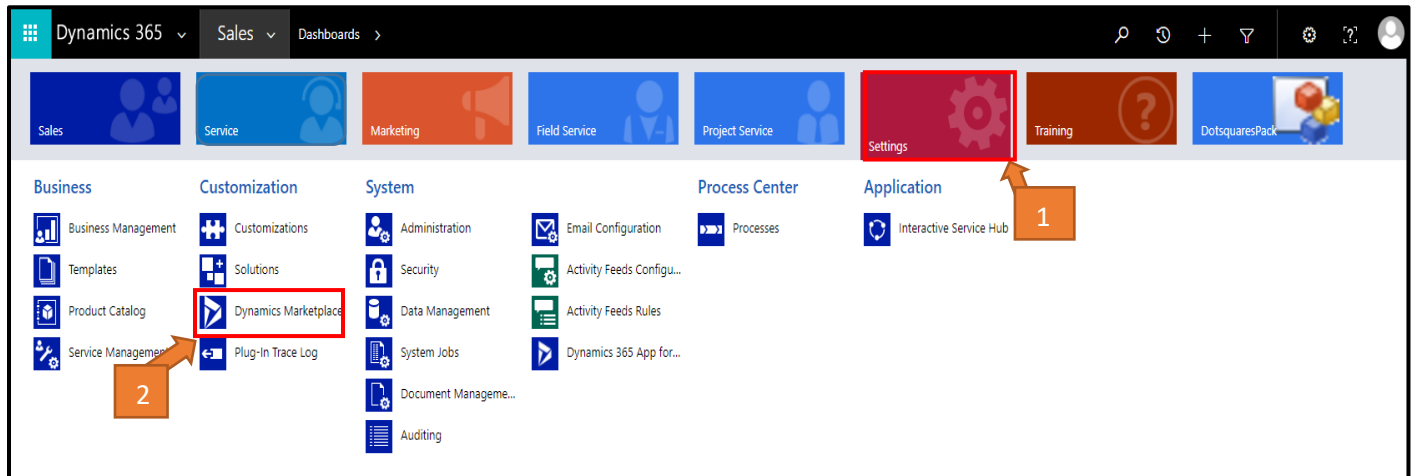THE CRM SERVICES VALUE SOURCE

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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.
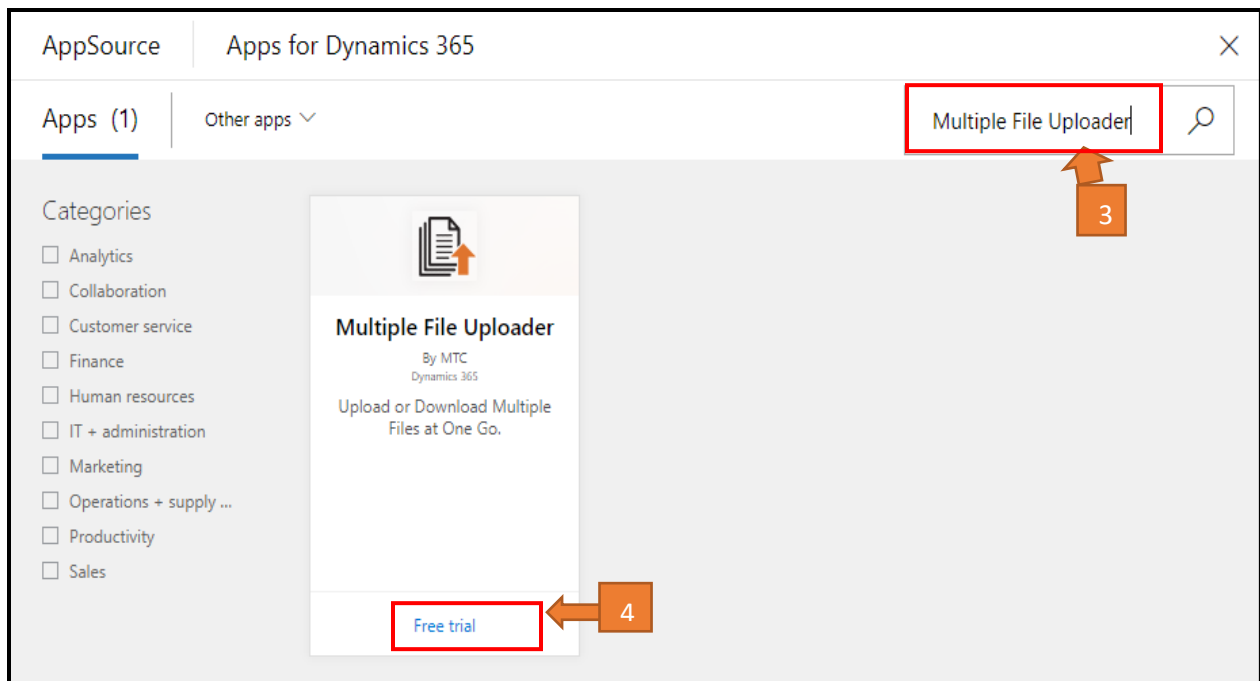
Step 1:

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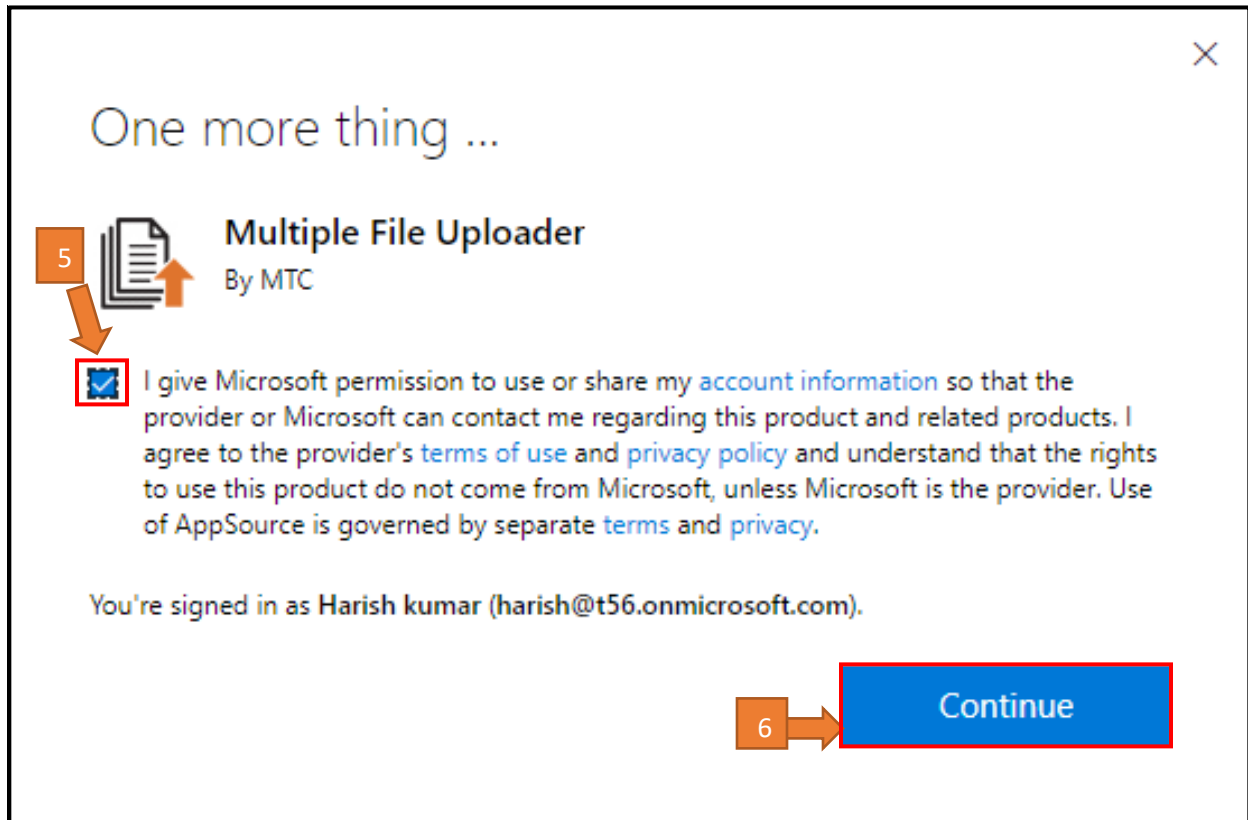

Step 2:

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

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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.

Step 5:

➢ After clicking on agree the **Installation Process Begins**.
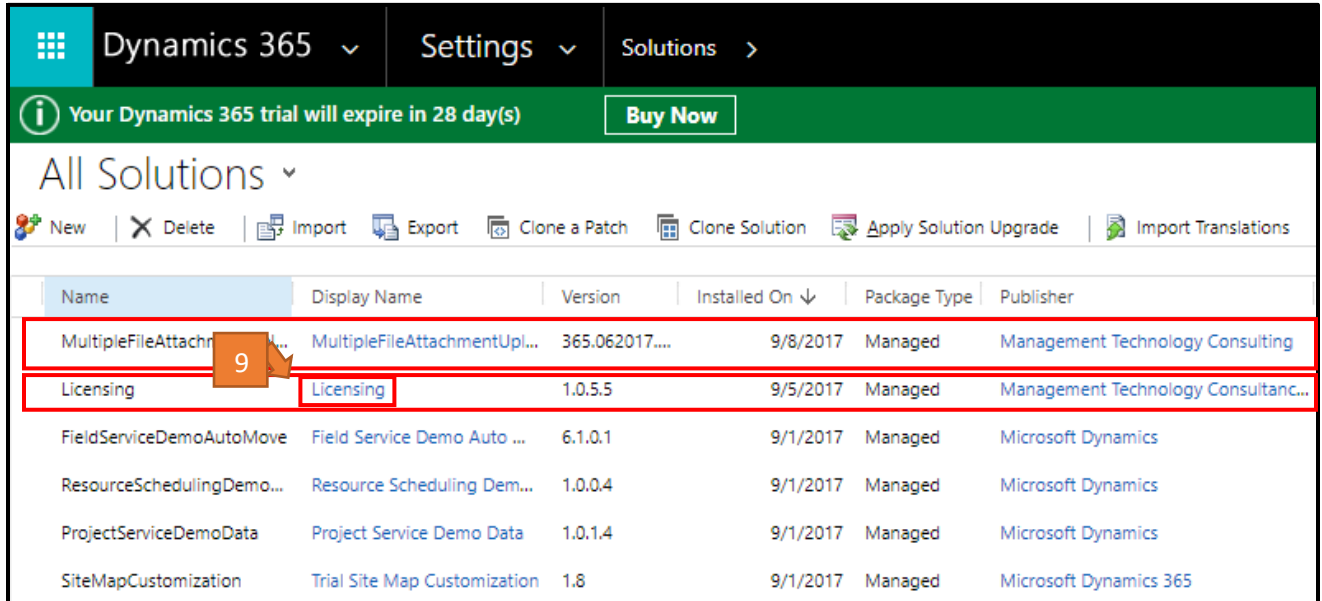
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Step 6:

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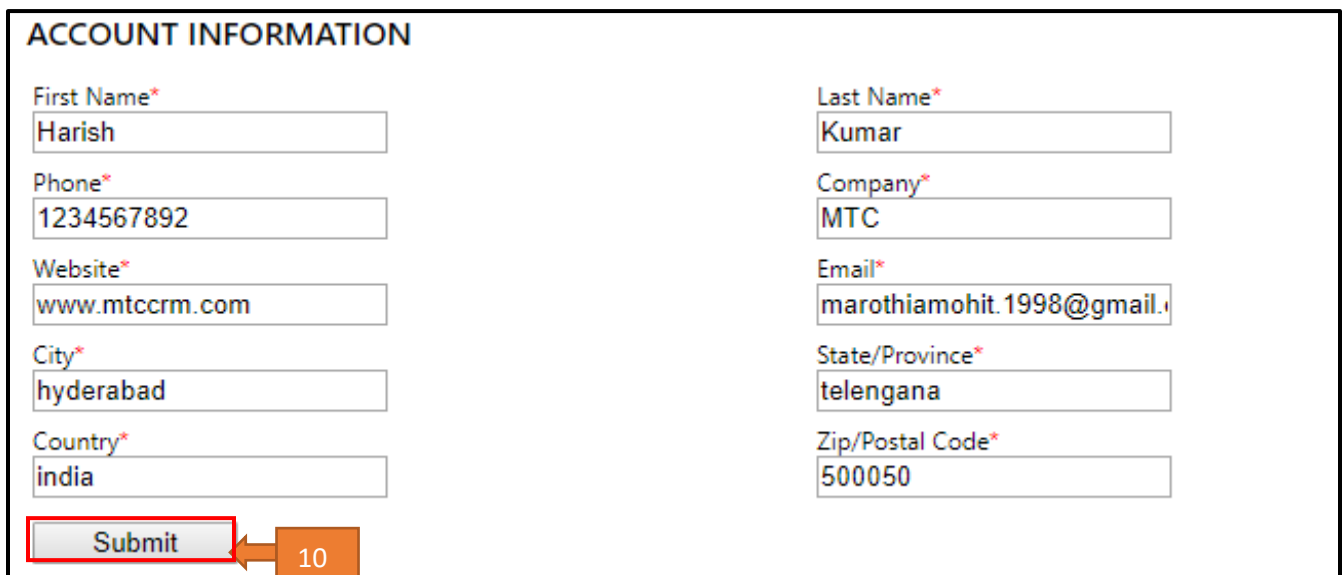- ➢ To get the free trial Click on **licensing solution.**

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."**

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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.**
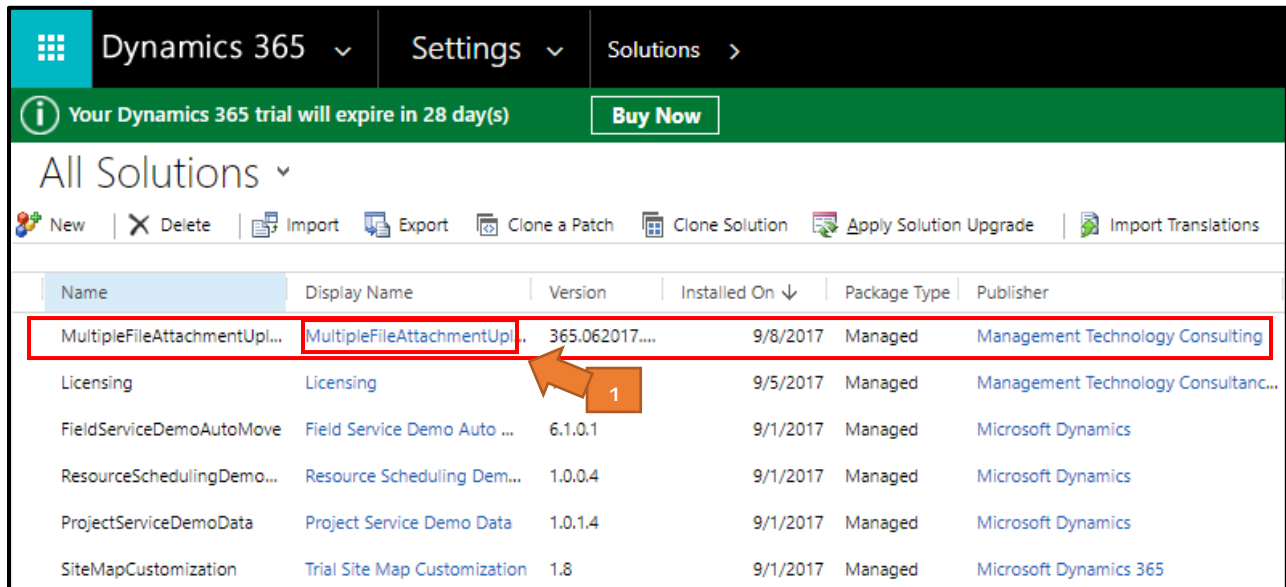
Products	Expiry Date	No of Users			⟳
Coffee Sender			Get it Now		
Address Search			Get it Now		
Attachment to Sharepoint			Get it Now		
Calendar Pro			Get it Now		
Capture Image			Get it Now		
CRM Data Validation Tool			Get it Now		
MultiFile Uploader			Installed	Purchase License	Update License
Customer 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.

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

Step 1:

➢ Navigate to **Dynamic365 -> Settings -> Solutions**. . You will find **MultipleFileAttachmentUpload** solution. Click on it.
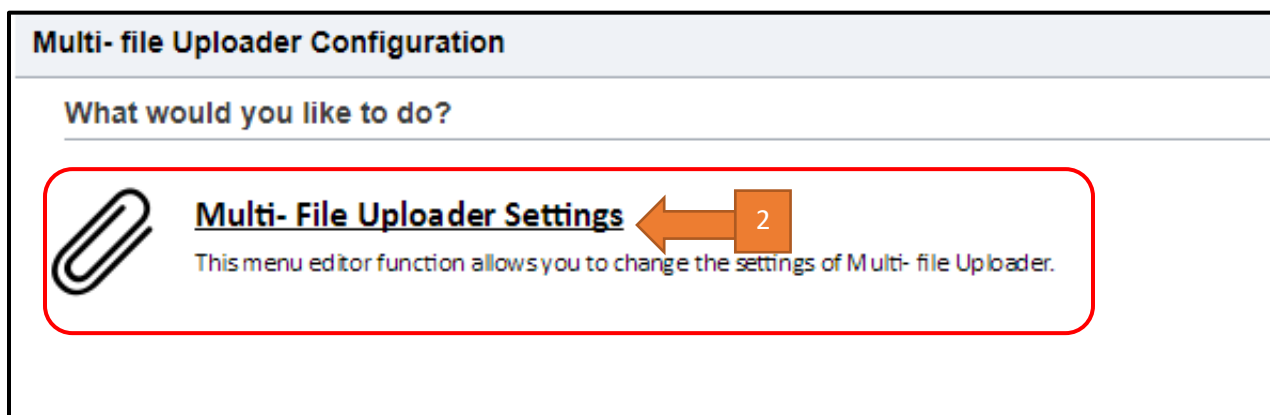

Step 2:

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

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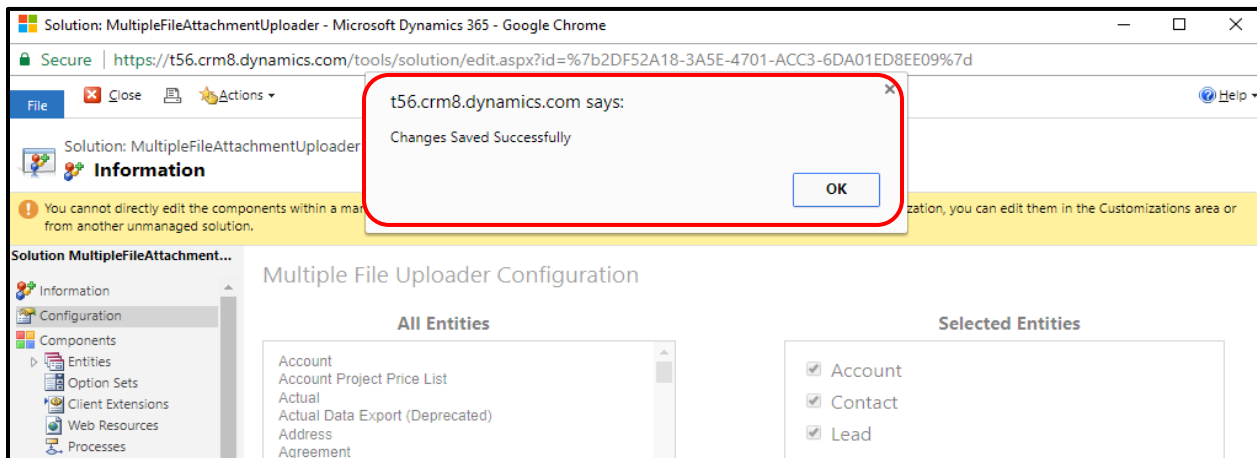
Step 3:

- ➢ You will 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**
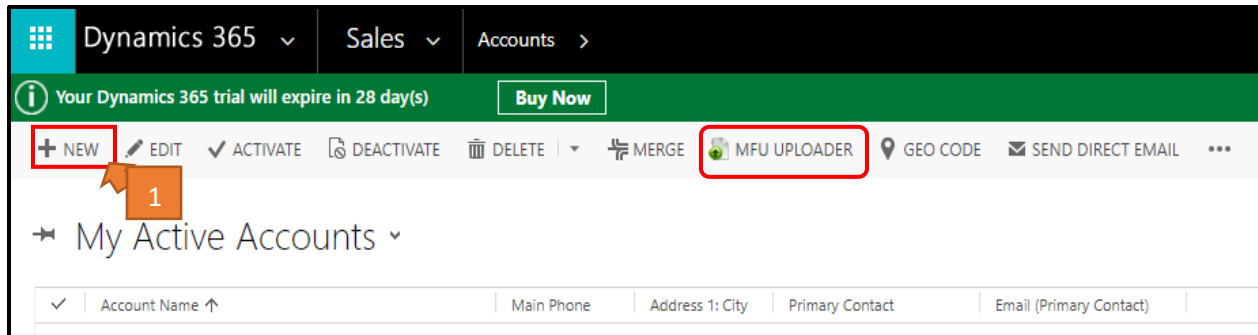
Step 2:

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

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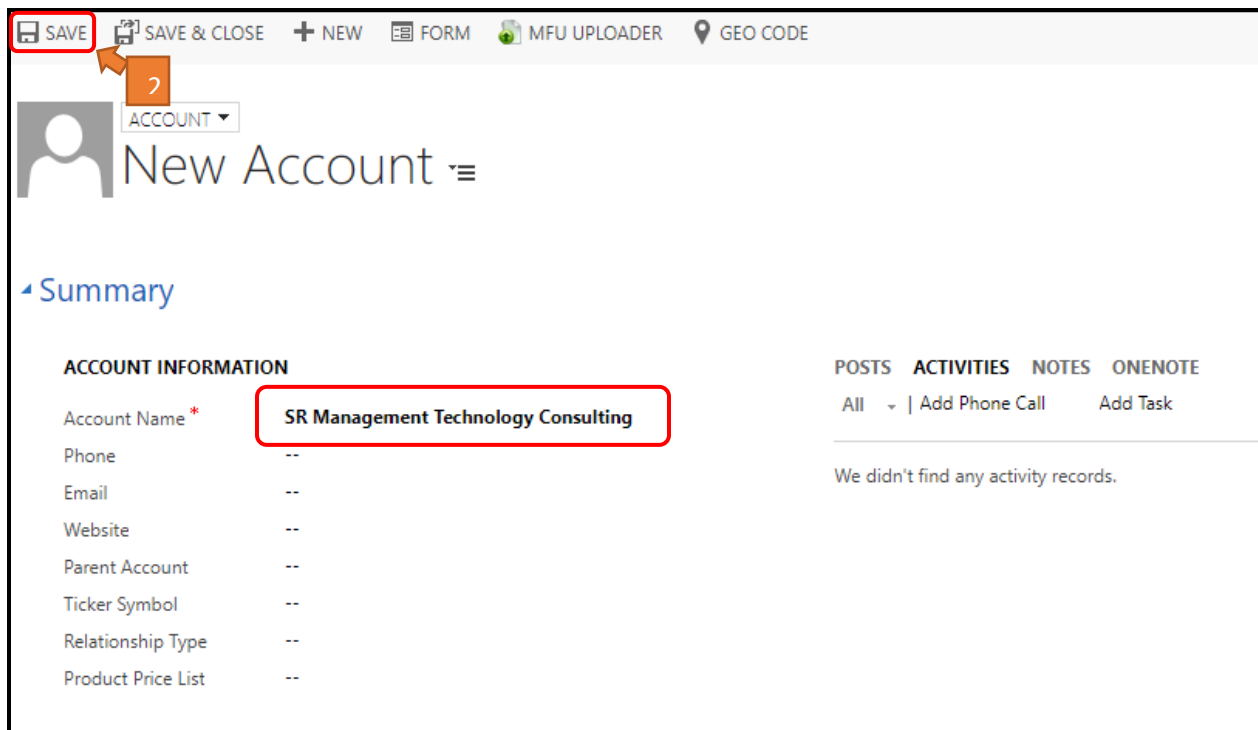
Step 3:

➢ Now you can click on **MFU UPLOADER** for uploading/downloading multiple files.
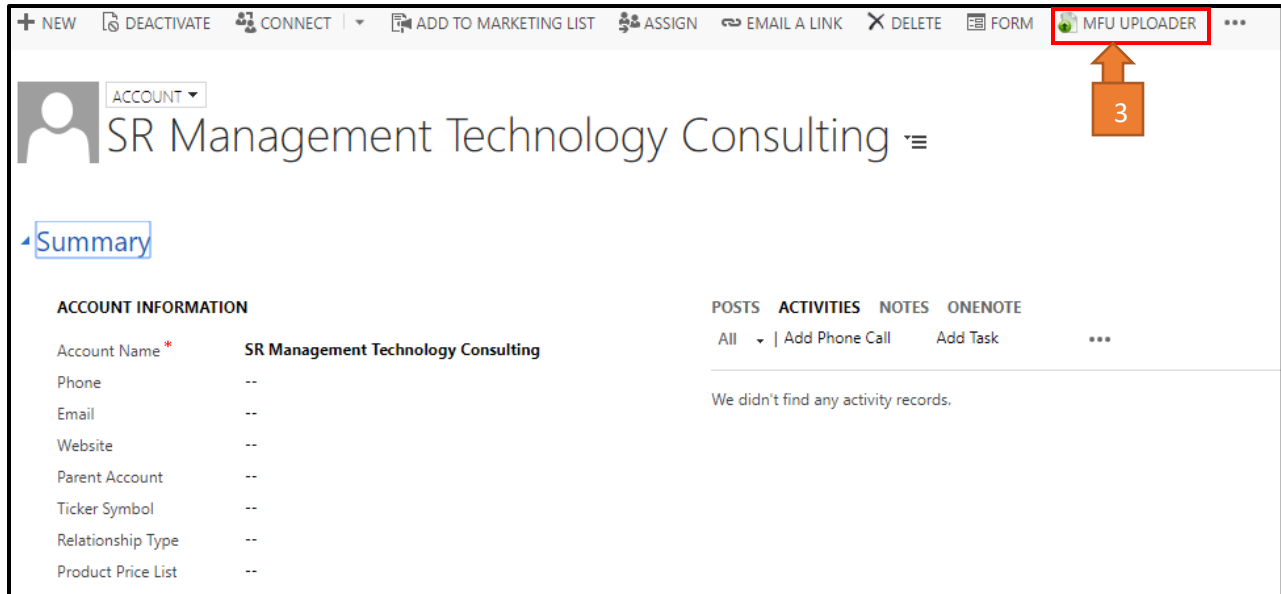
Step 4:

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

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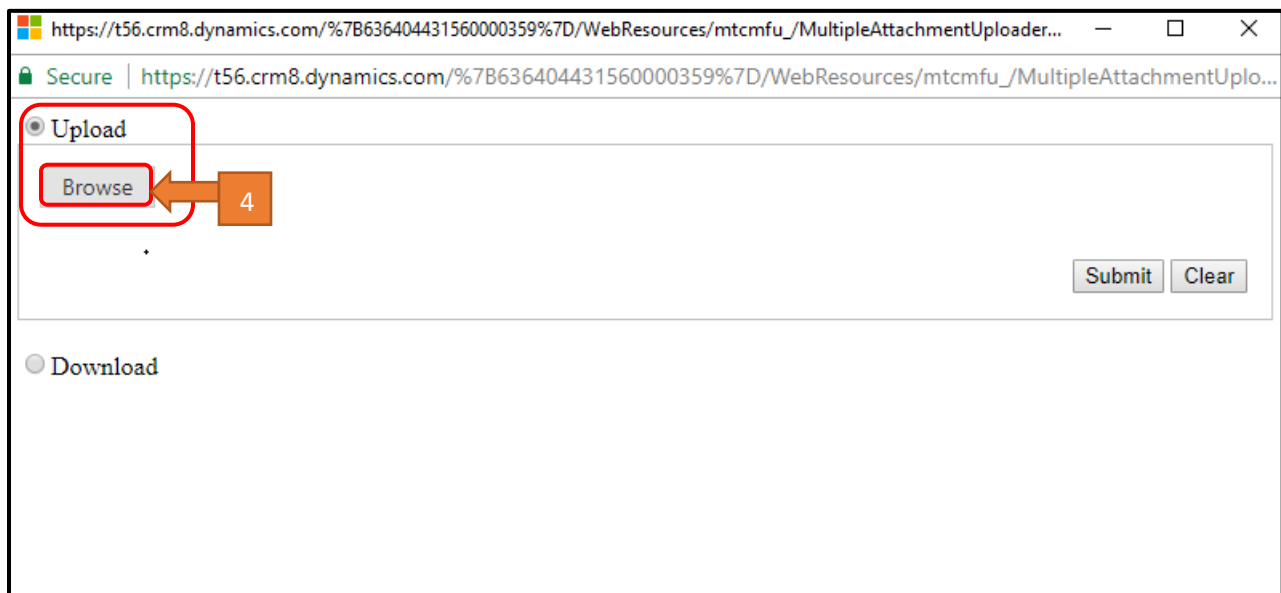
Step 5:

- ➢ Now you can see **multiple selected files are ready to be uploaded.** Click on **Submit** button.
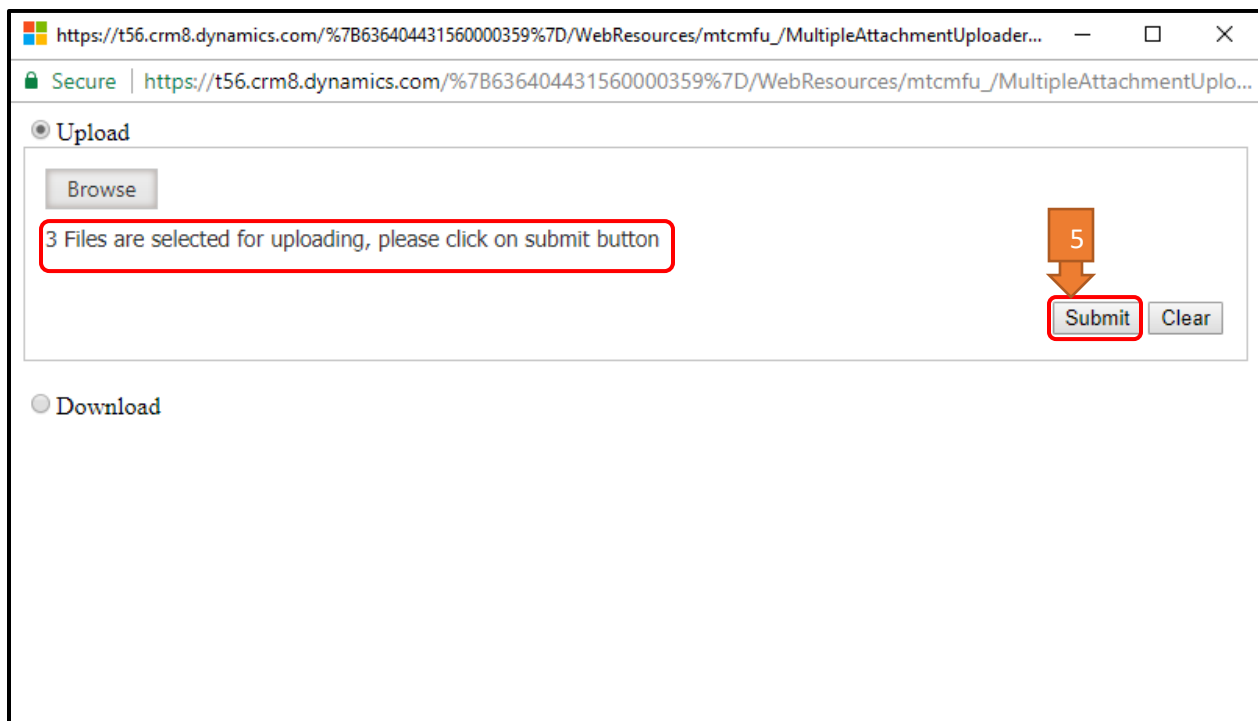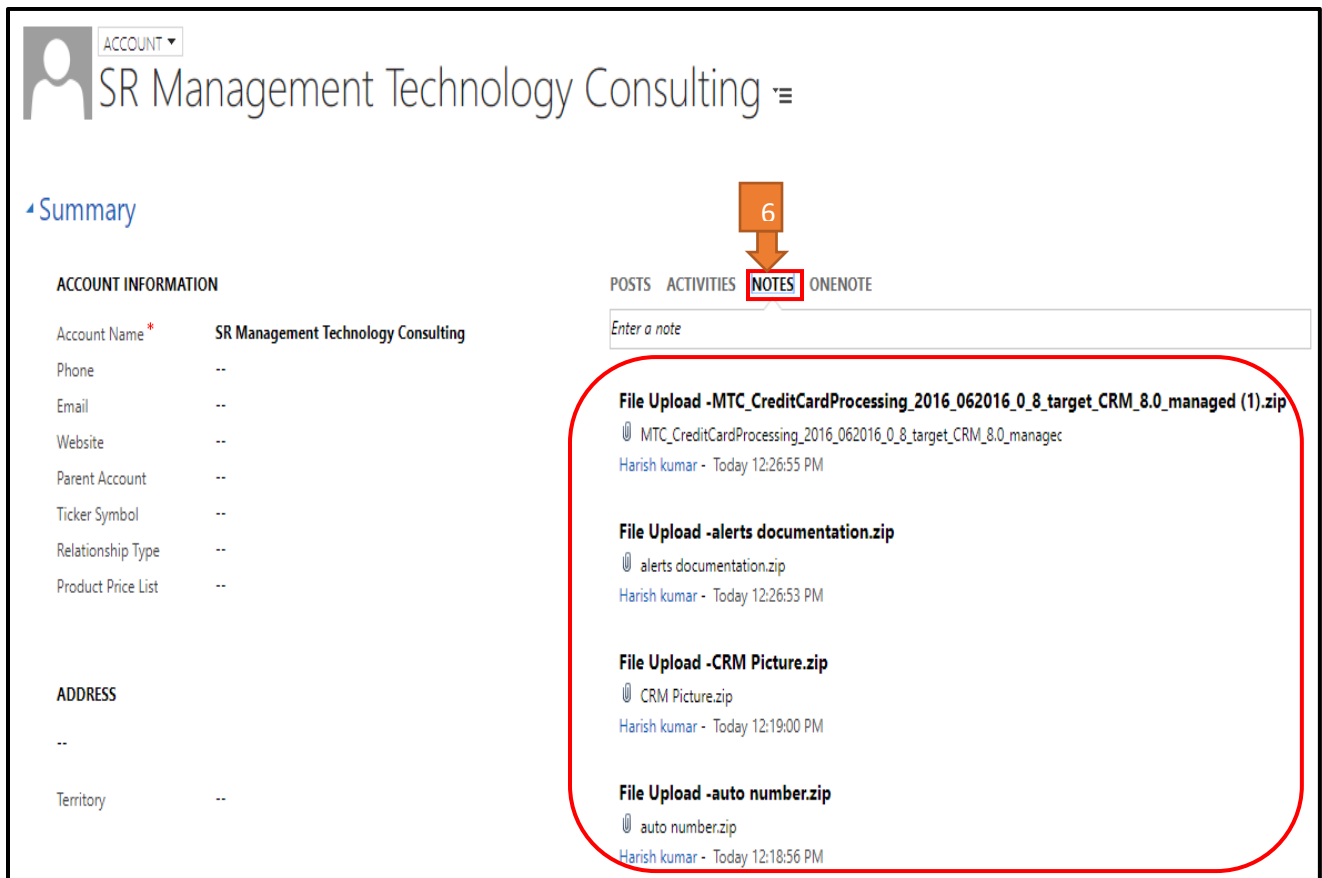
Step 6:

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

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Step 7:

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

How to Delete Files?

Step 8:

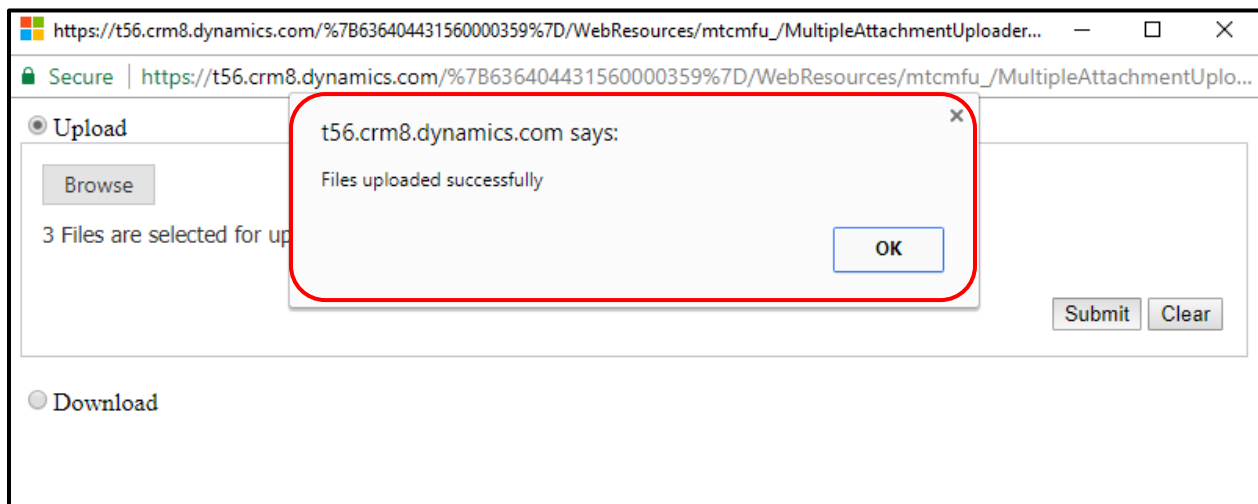➢ To **Delete** any of the uploaded or previously present files click on **MFU UPLOADER**.
➢ A window appears as shown below. Select **Download** option.
➢ Another window appears with all uploaded files. Select files which you want to **Delete**.
➢ Click on **Delete**.

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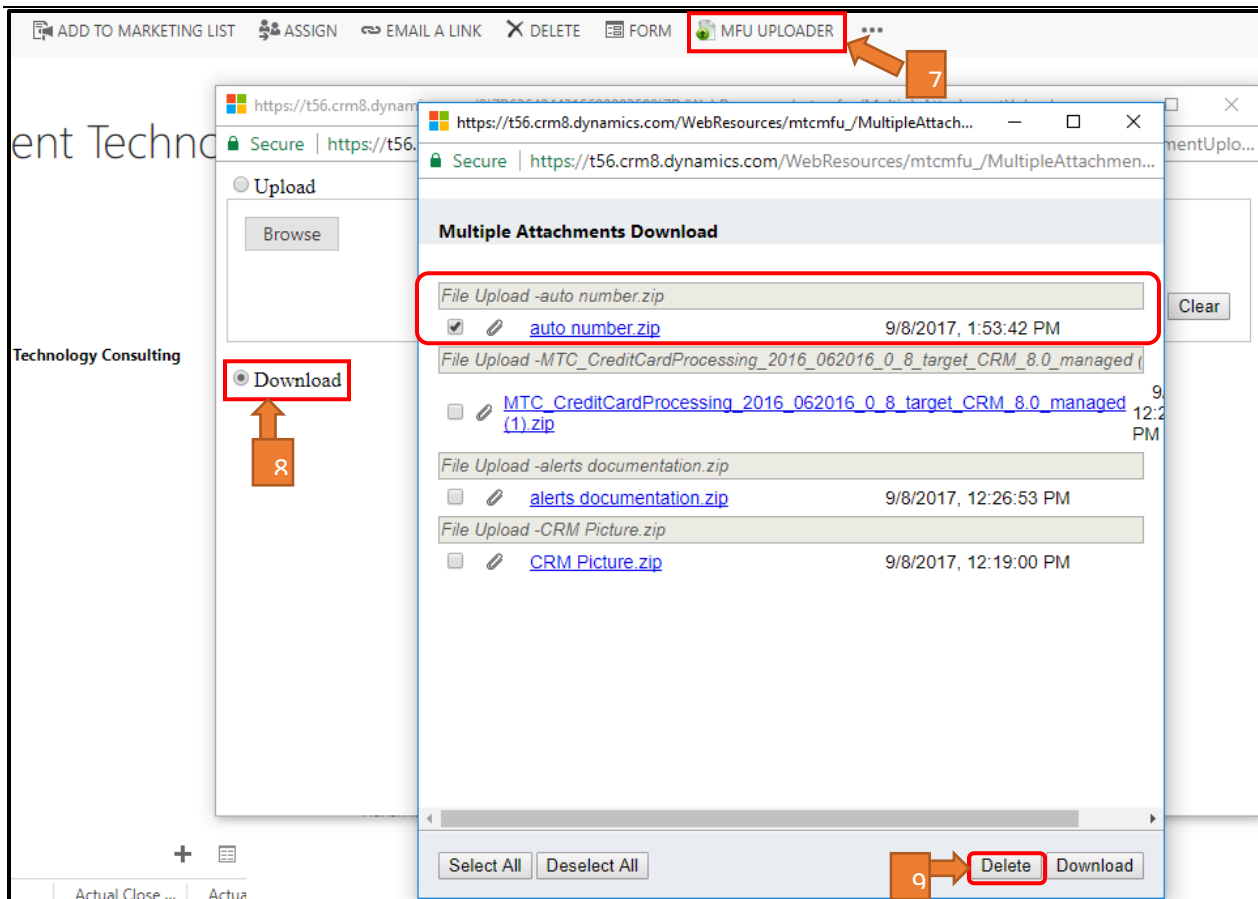
How to Download Multiple Files?

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**.

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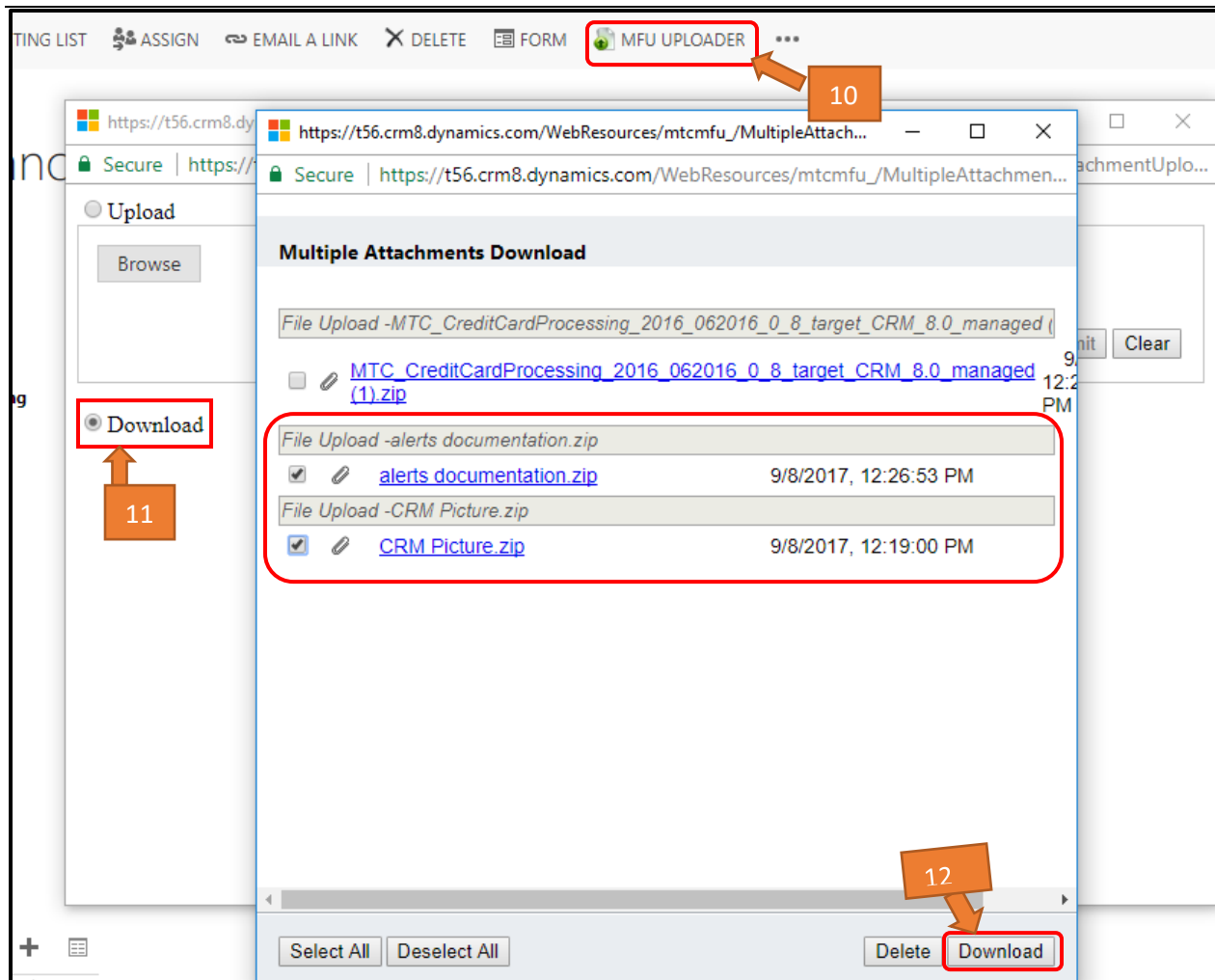
Step 11:

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

Multiple Attachments Download

		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 (1).zip	9/8/2017, 12:26:55 PM
		File Upload -alerts documentation.zip	
☑	📎	alerts documentation.zip	9/8/2017, 12:26:53 PM
		File Upload -CRM Picture.zip	
☑	📎	CRM Picture.zip	9/8/2017, 12:19:00 PM

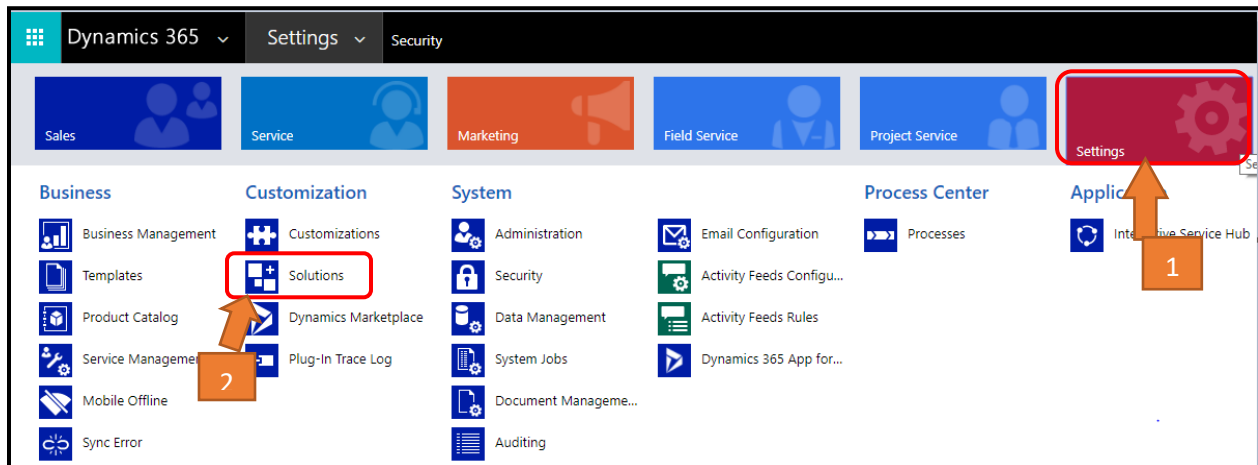Select All Deselect All   Delete Download

CRM Picture.zip ^   alerts documentati....zip ^   Show all ✕

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## 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**.

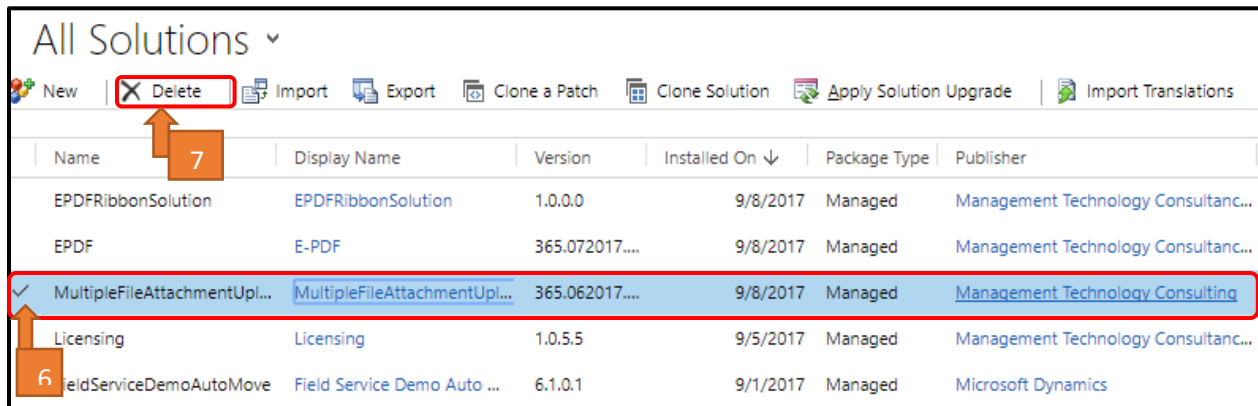➢ Select the solution and click on **Delete**.

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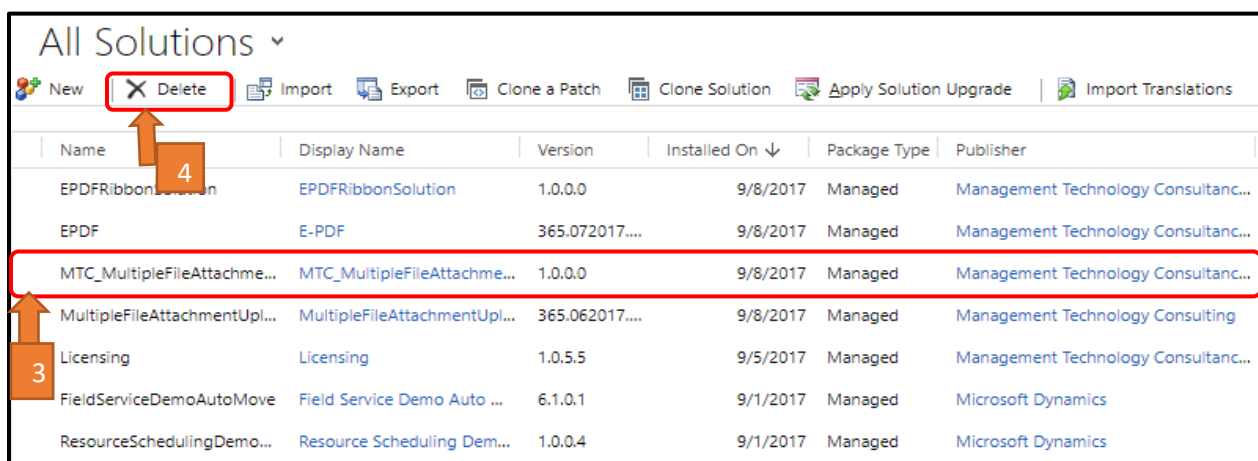
Step3:

➢ Click on **ok** to start uninstalling **MTC_MultipleFileAttachmentUploader**.
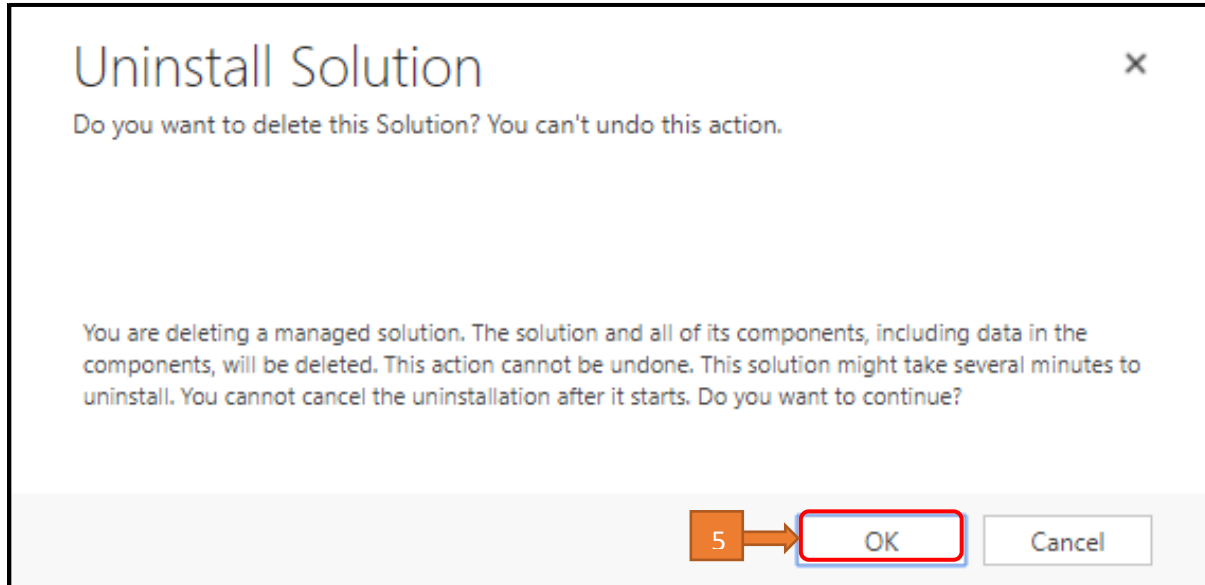
Step4:

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

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Step5:

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

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