



CRMI Image Gallery Managed Solution

For Microsoft Dynamics CRM Online 2015 / 2016

Installation & User Manual V1.0

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INTRODUCTION

Highlights

The *CRMI Image Gallery* is an easy to use image carousel display solution that provides the ability for you to add images to a record and be able to see those images in an image carousel right on the main form when you open the record.

Once your system administrator has installed and registered the managed solution and configured the image gallery settings for a CRM entity, you will be able display image(s) in the selected record of that entity in CRM, provided you have rights to append notes to this entity. With the image gallery in place, you have full control to add and remove images. You can view the image in its original size and you can set an image from the gallery as the entity image for the record.

Features

- *CRMI Image Gallery* will work with: CRM Online 2015 or CRM Online 2016
- *CRMI Image Gallery* supports: .png, .jpg, .jpeg and .gif photo types.
- *CRMI Image Gallery* can work with or without the CRMI QuickPic Mobile App.
- *CRMI Image Gallery* can be used with any entity that has Notes enabled. (The Set feature that sets the record's entity image will only work if the entity also has an entity image field enabled.)

Browser Versions Supported

- IE9+
- Chrome
- Firefox

SOLUTION IMPORT

Pre-Import Steps

Before getting started export the current CRM Default Solution as backup.

Step by Step Import

1. Navigate to Settings | Solutions and click the "Import" button.
2. Click browse and select the *CRMI Image Gallery* managed solution zip file and click "Next".
3. Click "Next" after reading the Solution Information page.
4. Under Import Options page leave "Enable any SDK message processing steps included in the solution" box checked and click "Import".
5. When the solution import progress pop-up is completed and you receive the "The import of the solution: completed successfully" message click "Close".
6. Click "Publish All Customizations" in the command bar of the All Solutions grid view.

LICENSE ACTIVATION

In order for *CRMI Image Gallery* to work you must have a valid license installed. Once you have provided to CRM Innovation the required information below a .lic file will be sent to you:

- CRM Version (2015 or 2016)
- CRM Online URL
- # of Enabled CRM Users

Note: Image Gallery is license based on enabled user bands and is organization specific. If you need to use the Image Gallery solution on other environments, ie. Dev, test, etc. you will need to acquire a secondary license for this purpose.

Step by Step License Install

1. Navigate to Settings | CRMI License Details and click the "+ New" button.
2. Click "Chose File" and select the .lic file sent to you by CRM Innovation and click "Open"
3. Click the "Upload License" button
4. Save & Close the record

IMAGE GALLERY SETUP

After you've imported and registered the *CRMI Image Gallery* solution, the first thing you will want to do is add the image gallery, where the images are displayed, onto an entity's form in CRM.

If you want to add the image gallery to an entity form (OOB or Custom Entity) you will need to:

1. Make sure the entity is set up to have Notes. This is done by checking the "Notes (includes attachments)" box under the entity's Communication & Collaboration settings.
2. Make sure the Notes Pane is enabled on the entity's form. You can add the Notes Pane to an entity form from the Form Editor by selection a section, clicking on the Insert Tab and clicking the "Notes" button.

If you want to be able to use the Set feature in the image gallery to set a record's entity image you will also need to:

1. Make sure your entity is set up to have entity images. This is done by creating a field of the "Image" type for the entity and then making sure that Primary Image field under the Entity Definition section is set to Entity Image.
2. Make sure the Entity Image is enabled on the entity's form. This is done by bringing up the Form Editor and selecting Form Properties. Go to the Display tab and make sure the "Show image on the form" box is checked. (If the box is unable to be checked it is because you have not set up the entity image for the entity under step 1.)

To add the image gallery to an entity's form:

1. Navigate to the Form Editor for the specific entity and form to which you'd like to add the image gallery:
 - Go to Settings | Customization | Customize The System and from there under the desired entity select Forms and then select that entity's main form where you want to add the image gallery
 - Open a record of the entity and form where you wish to add the image gallery and click the "Form"/"Form Editor" button in the command bar (it may be under the "... " drop down)
2. Select the desired section on the form and click on the Insert Tab.
3. Click the "Web Resource" button.
4. Use the lookup field and search for the resource called crm_newCRMQuickPicPlus.html.

5. Give the resource a name in the "Label" field, for example imagegallery.

6. Under Web Resource Properties make sure to check the box next to "Pass record object-type code and unique identifier as parameters".

7. Go to the Formatting Tab and the columns and rows you would like the image gallery to fill and click OK.

** Recommendations:

- Row Layout: set 17 for "Number of Rows".

- Border: uncheck the box next to "Display border".

8. Save & Publish the form.

USING CRMI IMAGE GALLERY

When you open an existing record for an entity where you have set up the image gallery you will see it rendered on the form where you put it. If you are creating a new record the image gallery will not be visible or enabled until the record is saved and refreshed. Below are the functions of the image gallery:

- **Add (+) icon:** this enables you to browse your file system and add an image to the image gallery. This action works by adding a Note with an attachment for this record. You can also add new image to the image gallery by adding an image file as an attachment to a Note directly in the Notes Pane (you will need to refresh your browser to see these new images in the image gallery).
* Drag-and-drop function may be added in a later version.
- **Set (✓) icon:** this enables you to set the selected image as the entity image for the record. Once this is done, deleting the image from the image gallery or deleting the Note record or attachment associated with this image will not remove the set entity image.
* This function is not available for the User entity.
- **Remove (✕) icon:** this enables you to remove/delete the selected image from the image gallery. Once you confirm the prompt message, the selected image is removed from the image gallery and the Note record associated with the image will also be permanently deleted. You can also remove images from the image gallery by deleting the Note or attachment associated with the image directly in the Notes Pane of the record.
- **View (🔍) icon:** will open the image in a pop-up window, shown in its original size up to a max of 900x800 pixels. (If this is not working the first time you try it after set up you may need to refresh your browser)
* Depends on your browser setting, it may open a new tab instead of a new window.

UNINSTALLING THE SOLUTION

To uninstall the solution, do the following:

1. Remove the image gallery web resource from all entity's forms where it has been placed.
2. Navigate to Settings | Solutions
3. Select the CRM Innovation Image Gallery solution and click the "X" to delete the solution