



Install & User Guide - Quick Picture Add-on

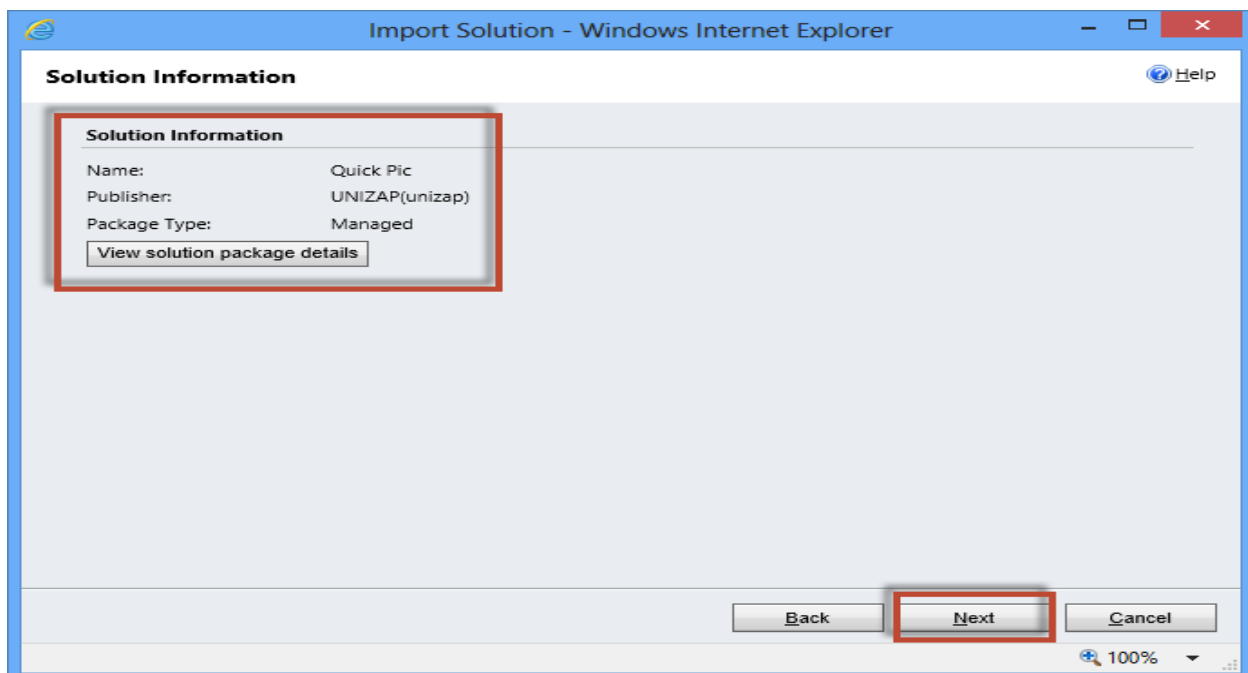
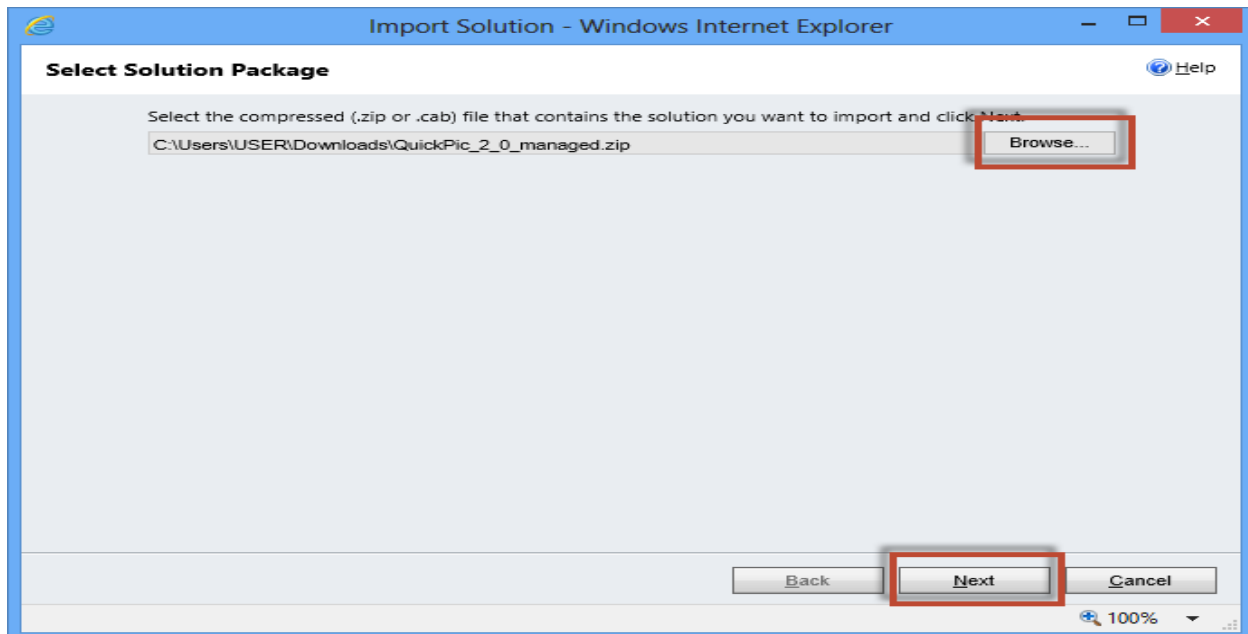
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Installation

1. Log in to your Microsoft Dynamics CRM 2011 instance as a System Administrator or System Customizer – Must have administrative privileges.
2. Navigate to Settings > Solutions and click on Import.
3. The next window that opens will let you browse for the solution you are importing – navigate to the QuickPic_2_0_managed file downloaded from Unizap website, select it and complete the import as shown here.





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Import Solution - Windows Internet Explorer

Import Options

Post Import Actions

☒ Activate any processes and enable any SDK message processing steps included in the solution.

Back Next Cancel

100%

Import Solution - Windows Internet Explorer

Importing Solution

The import of solution: Quick Pic completed successfully.

Date Time	Type	Display Name	Name	Status	Description
13:07:46.19	SDK Message Pr...	UNIZAP.Addon....	UNIZAP.Addon....		
13:07:46.15	SDK Message Pr...	UNIZAP.Addon....	UNIZAP.Addon....		
13:07:43.57	Dependencies C...				
13:07:34.88	Security Role	QuickPic	QuickPic		Security role.
13:07:33.35	SDK Message Pr...	UNIZAP.Addon....	UNIZAP.Addon....		
13:07:33.31	SDK Message Pr...	UNIZAP.Addon....	UNIZAP.Addon....		
13:07:32.88	Plugin Assembly	UNIZAP.Addon....	UNIZAP.Addon....		
13:07:26.72	Chart		unizap_quickpic...		Entity that store
13:07:22.81	Relationship				
13:07:20.80	Entity Ribbon	Quick Pic Data	unizap_quickpic...		XML data that r
13:07:20.62	Entity Messages		unizap_quickpic...		Text that repres
13:07:20.61	Form	Quick Pic Data	unizap_quickpic...		System-popula

Download Log File Next Close

100%



Placing Quick Picture on Product Form

- Quick Picture Add-on lets you add photos to your CRM records.
- This is very useful when your users want to have a gallery of pictures which they can browse through directly on CRM form.

To place Quick Picture on Product Form please follow the steps below:

1. Open Form customization window in Product Entity & navigate to Insert Tab to insert a new Web Resource. Add *unizap_QuickPic.html* as shown in the following images.

The screenshot shows the Microsoft Dynamics CRM Form Designer interface. The 'Insert' tab is selected in the ribbon, and the 'Web Resource' control is highlighted. The 'Field Explorer' on the right shows the 'Product' entity fields. The 'Form' pane shows the 'Product' form with various fields like ID, Name, Subject, Unit Group, Default Unit, Currency, Product Name, Product Type, Quantity On Hand, URL, List Price, Standard Cost, and Current Cost.

Add Web Resource

Add an existing web resource to the Form.

The 'Add Web Resource' dialog box is shown. The 'Web resource' field is set to 'unizap_QuickPic.html'. The 'Field Name and Properties' section shows 'Name' as 'WebResource_QuickPicture' and 'Label' as 'QuickPicture'. The 'Visibility' section has 'Visible by default' checked. The 'Web Resource Properties' section is empty.

Web Resource Properties

Modify this Web resource's properties.

The 'Web Resource Properties' dialog box is shown. The 'Layout' section shows 'One column' selected. The 'Row Layout' section shows 'Number of Rows' set to 6. The 'Scrolling' section has 'Never' selected. The 'Border' section has 'Display border' checked.



After you insert the Web Resource, the Product form should look like this. Save & Publish to continue.

2. Now open any **existing** product record from your CRM system to see the Quick Picture Placeholder as shown here. Hover on the placeholder to get access to buttons as shown in the screen below.

Note: The Quick Picture placeholder will be visible only on existing records. You must save the new record first before adding a picture to that record.



Using Quick Picture to add pictures to a record.

Note: To Add/Delete pictures, the user must be a System Administrator or must be assigned the “QuickPic” role which comes with the managed solution.

1. Click on the green button to add picture. Select the picture to add it to the product record.

Product
Ferrari Demo Car

Products

General

ID * CAR-001

Name * Ferrari Demo Car

Subject

Product Type Sales Inventory

Unit Group * Default Unit

Quantity On Hand 10.00

Default Unit * Primary Unit

URL

Currency US Dollar

Image placeholder with a green plus button.

2. You may add more than one picture to any record. Click on green button to add another picture.

Product
Ferrari Demo Car

Products

General

ID * CAR-001

Name * Ferrari Demo Car

Subject

Product Type Sales Inventory

Unit Group * Default Unit

Quantity On Hand 10.00

Default Unit * Primary Unit

URL

Currency US Dollar

Image placeholder with a green plus button.

You may browse through the images using the left/right arrow buttons as highlighted above.

3. Click on the Red (Cross) button to delete the displayed picture.

Product
Ferrari Demo Car

Products

General

ID * CAR-001

Name * Ferrari Demo Car

Subject

Product Type Sales Inventory

Unit Group * Default Unit

Quantity On Hand 10.00

Default Unit * Primary Unit

URL

Currency US Dollar

Image placeholder with a red cross button.



Place Quick Picture on any other entity form

You can place Quick Picture on any CRM entity form.

1. Navigate to the entity you'd like to place it on and open any existing record or new record of that entity.
2. Click the Customize tab - >Customize Form.
3. Insert the web resource as explained earlier in this guide.
4. Choose no. of columns & no. of rows as required.
5. Once you click Ok, you will see the web resource on the form design view. You may drag it to any other position in the tab as desired.

Note: The picture will be resized automatically based on the dimensions of the HTML web-resource. So, set the rows & columns of the web-resource accordingly.