



Created by MyCRM Ltd

ePicture 2011

User and function guide

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Function Description

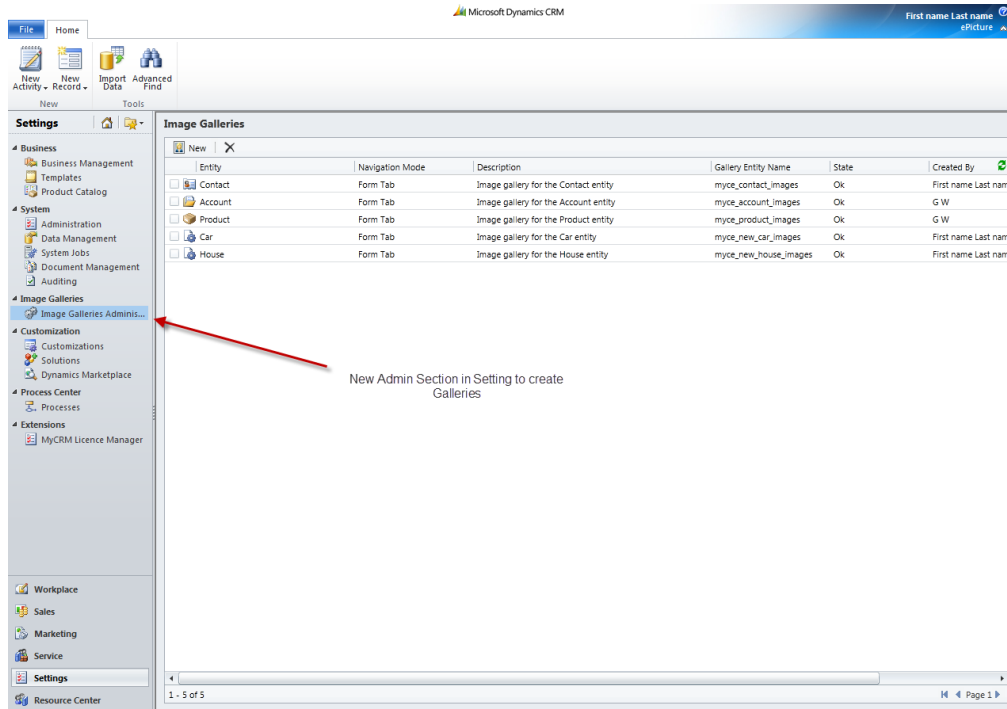
The main purpose of this document is to help end users gain insight and knowledge when using the latest release of ePicture for Microsoft Dynamics CRM 2011, from MyCRM.

The new ePicture function allows end users to create Image galleries against individual record types in CRM and select a resource to display a primary picture with doing any additional configuration or development of the CRM system.

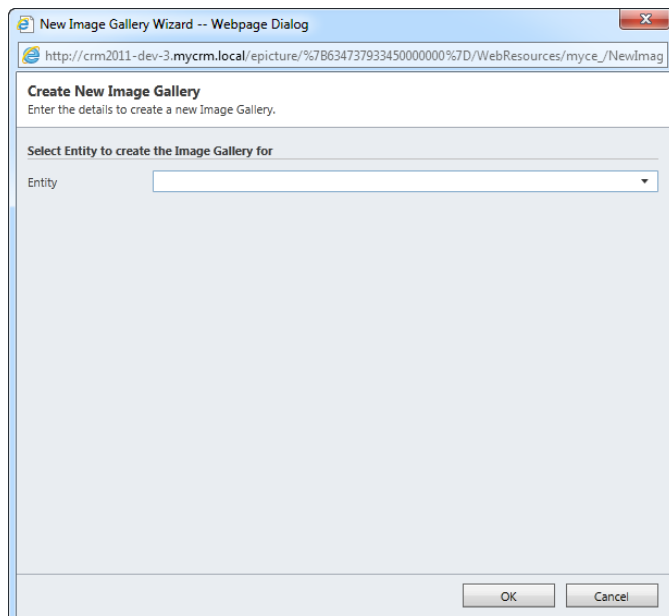


Create Image Galleries

After installing the ePicture Solution from the MyCRM Download Centre navigate to settings on the left to the Image Gallery Admin, and the following screen will be displayed.



From here select the “New” button from the tool bar



From the Drop Down select the entity type that will have the associated Image Gallery.

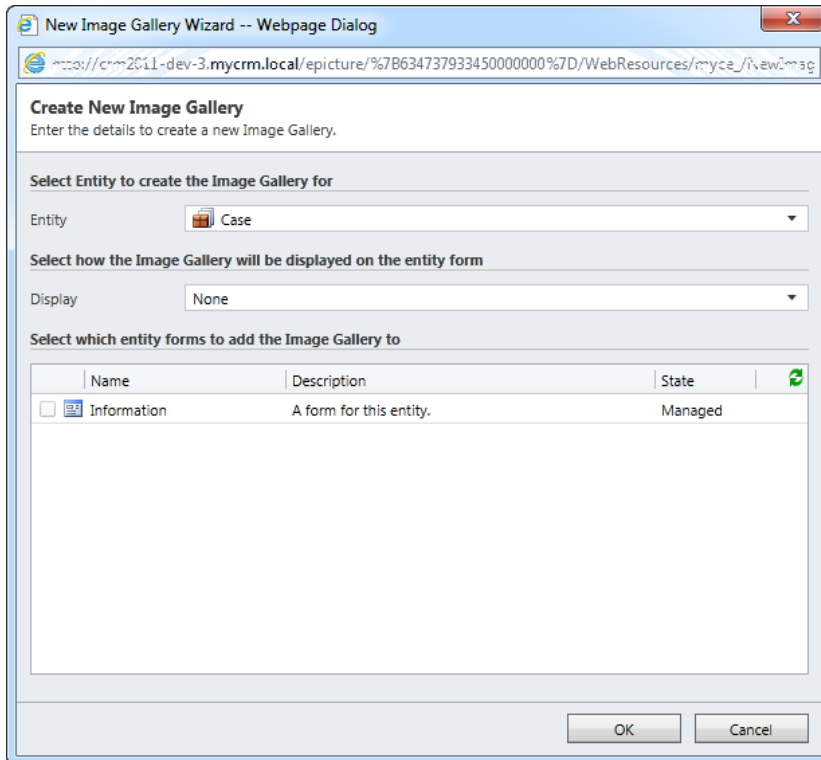
From the example below the Case entity in CRM has been selected, You can also select how users will navigate to the image gallery from the entity form.



None = the Gallery will not be displayed on the entity

Form Tab = Means the images Gallery is embedded on the form

Navigation Link = Image Library is available from the left Navigation



Create New Image Gallery
Enter the details to create a new Image Gallery.


Select Entity to create the Image Gallery for

Entity:

Select how the Image Gallery will be displayed on the entity form

Display:

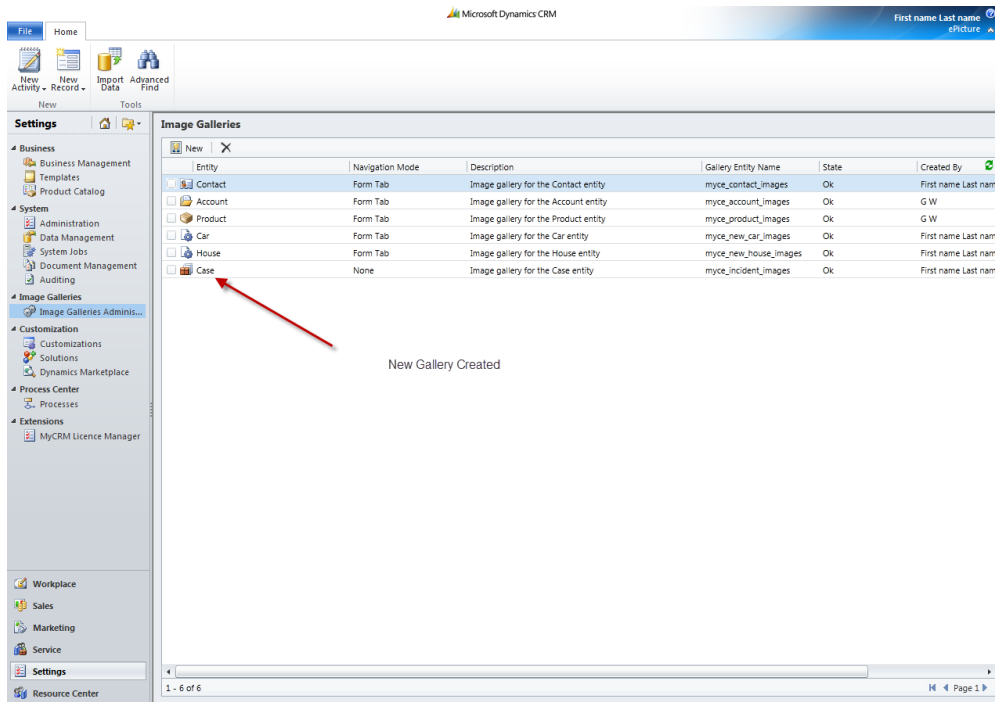
Select which entity forms to add the Image Gallery to

<input type="checkbox"/>	Name	Description	State	
<input checked="" type="checkbox"/>	Information	A form for this entity.	Managed	

OK Cancel

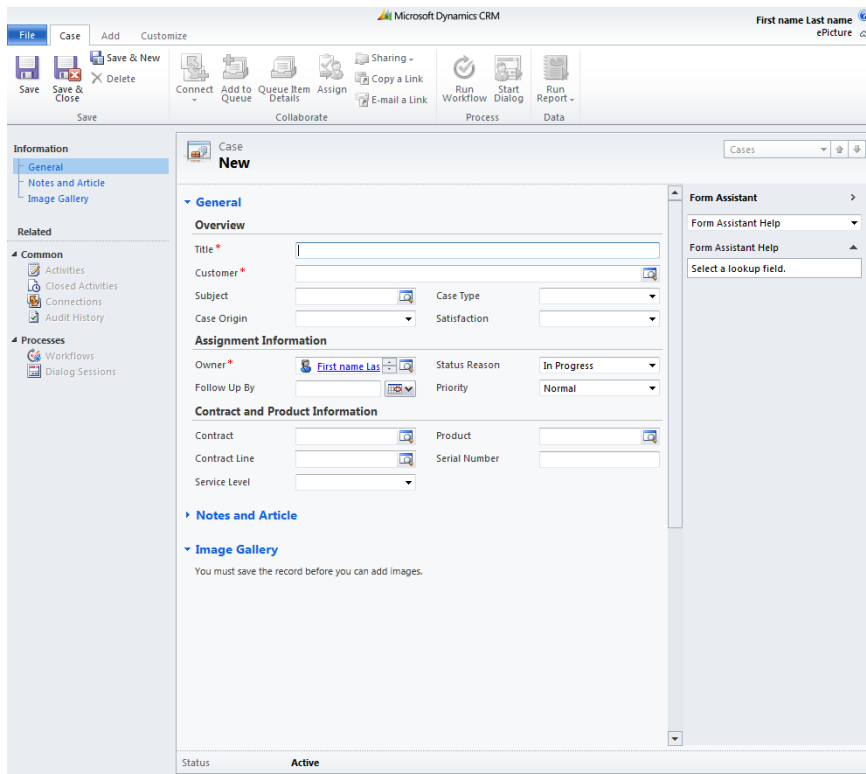


Once the above settings are set, select the OK button at the bottom of the screen. The New Gallery will be created and published in CRM.



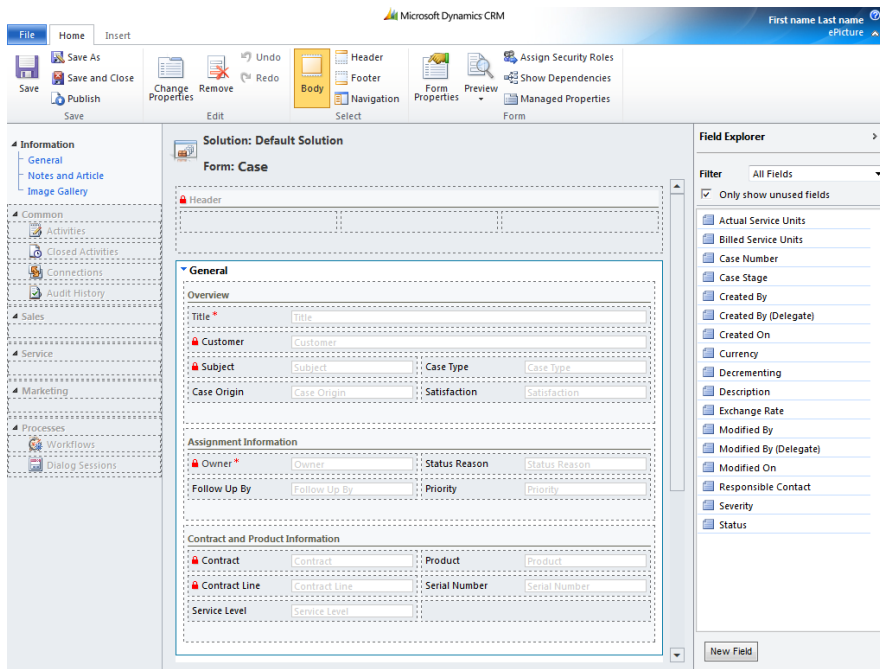
Using WebResource to Display Primary Picture on a Form

In this section we look at configuring a form to use the additional web resource to display a primary picture on a record, in this example the case record is being used.

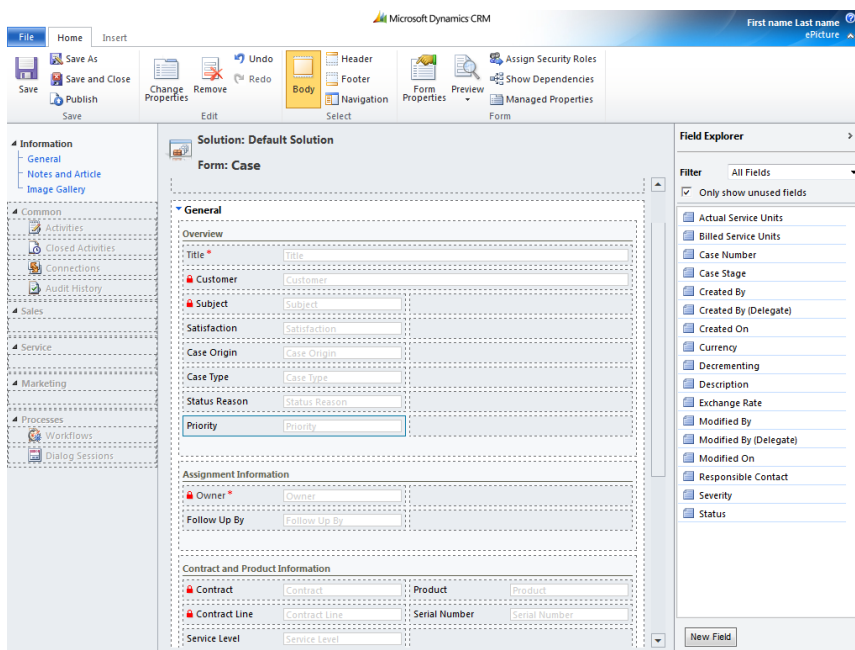


The above is a default view of the standard case record; the first step is to change the layout of the case record so that the web resource can be added to the form, using the customisation facility edit the case form.



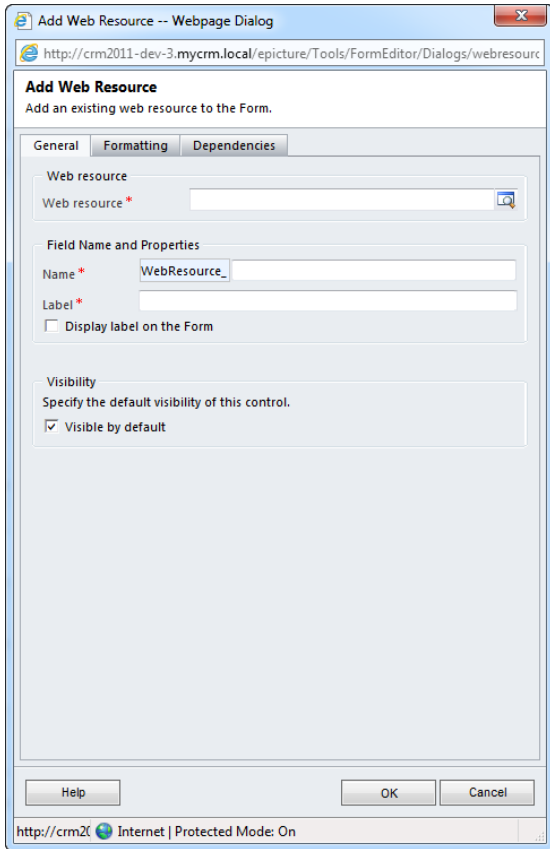


Using the edit tools layout the form as below, this is just an example so that a space is created for the new web resource on the form

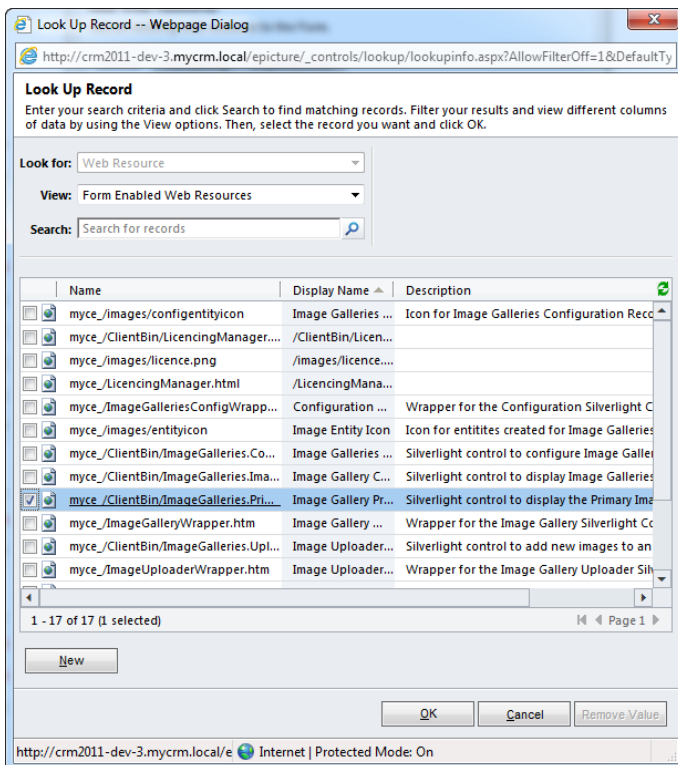


Then select the Insert tab at the top to add new web resource from the tool bar.

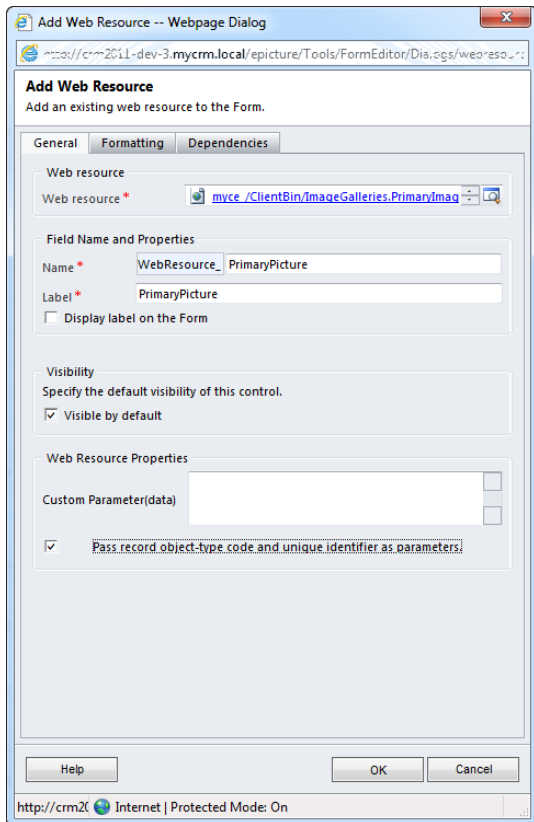




On the web resource form select the resource to use, this is as follows:

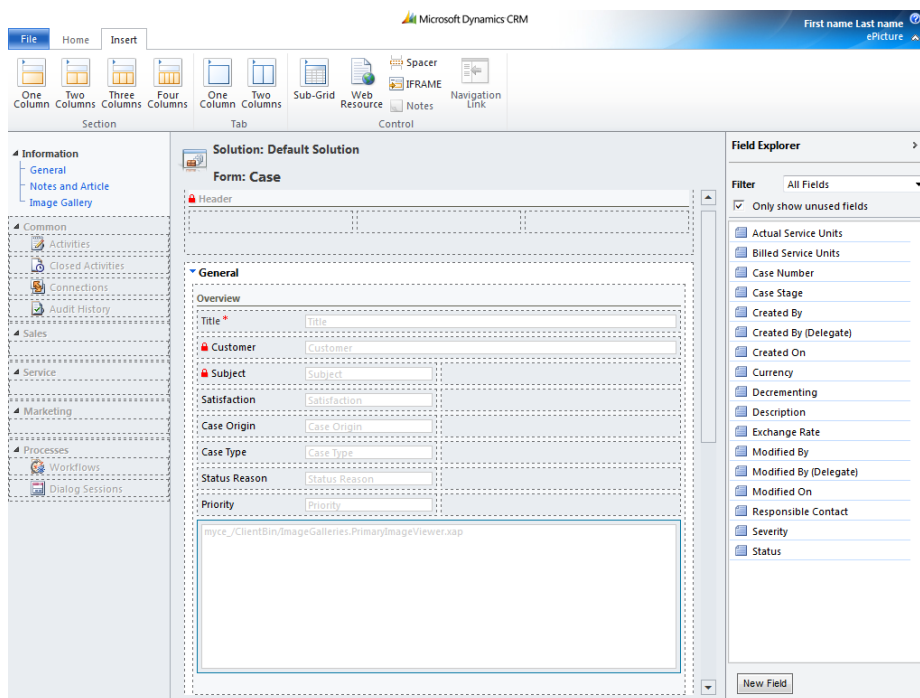


From this screen you can select ok and populate the relevant setting on the Web Resource screen.

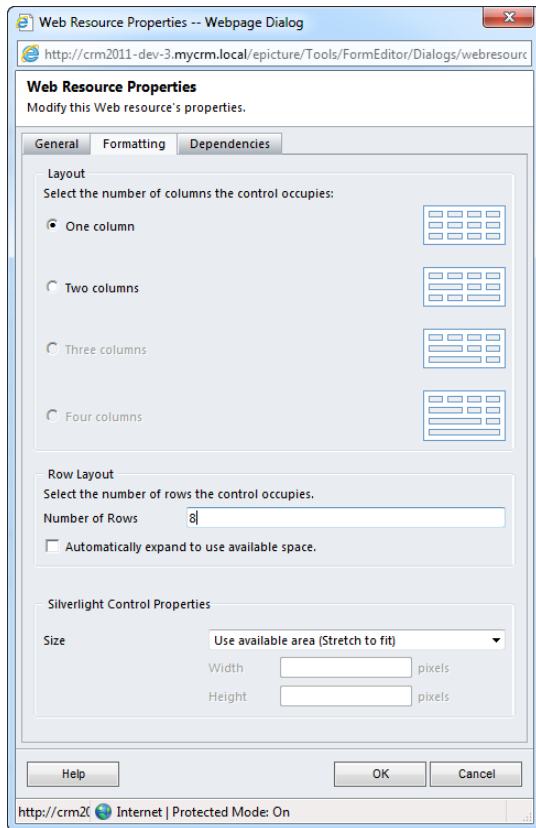


The select ok to return to the form

From the image below you can see the web resource has been added to the form, this by default is double column



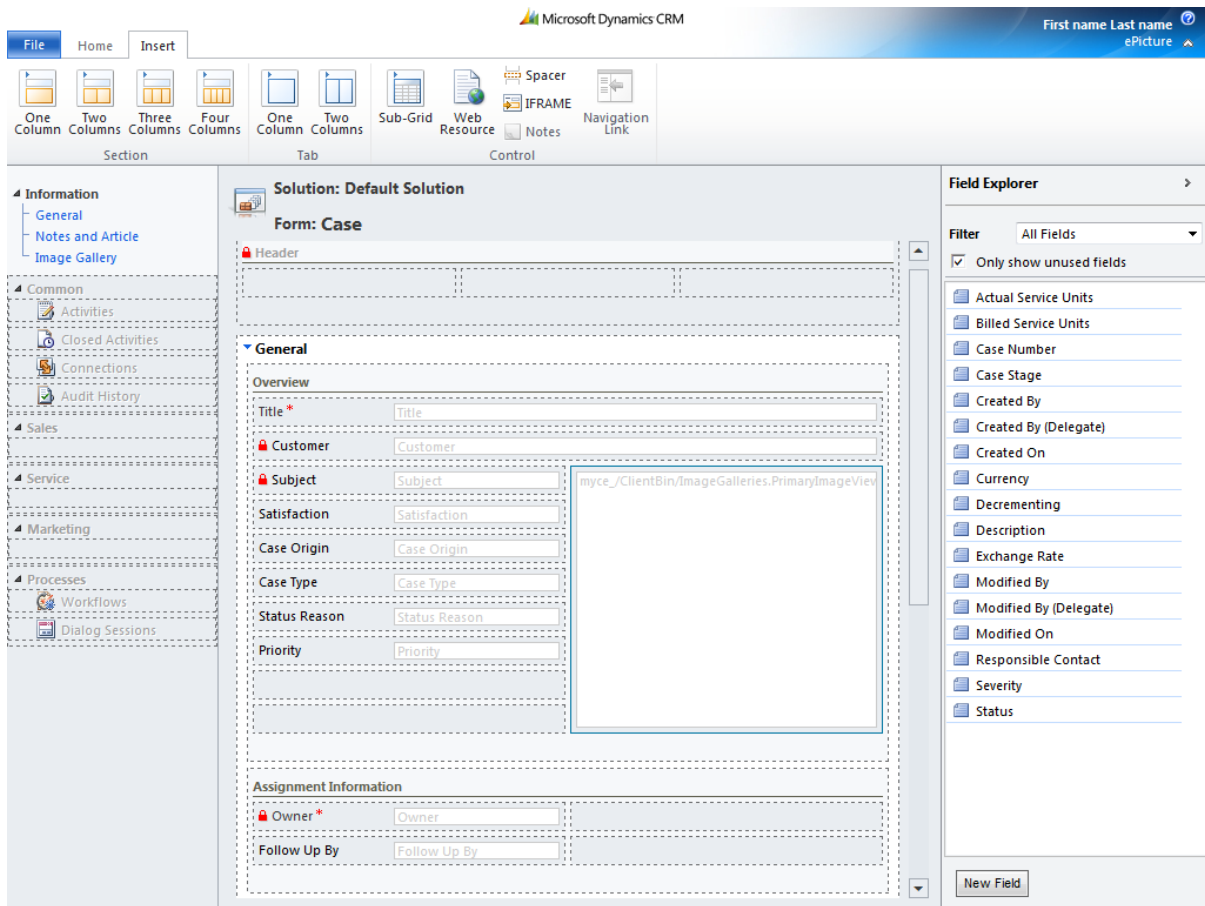
Select the web resource on the form by double clicking and change the format setting to be single column for best effect



Select ok to save the format settings

You can move the web resource into place so that the edited screen looks like the example below





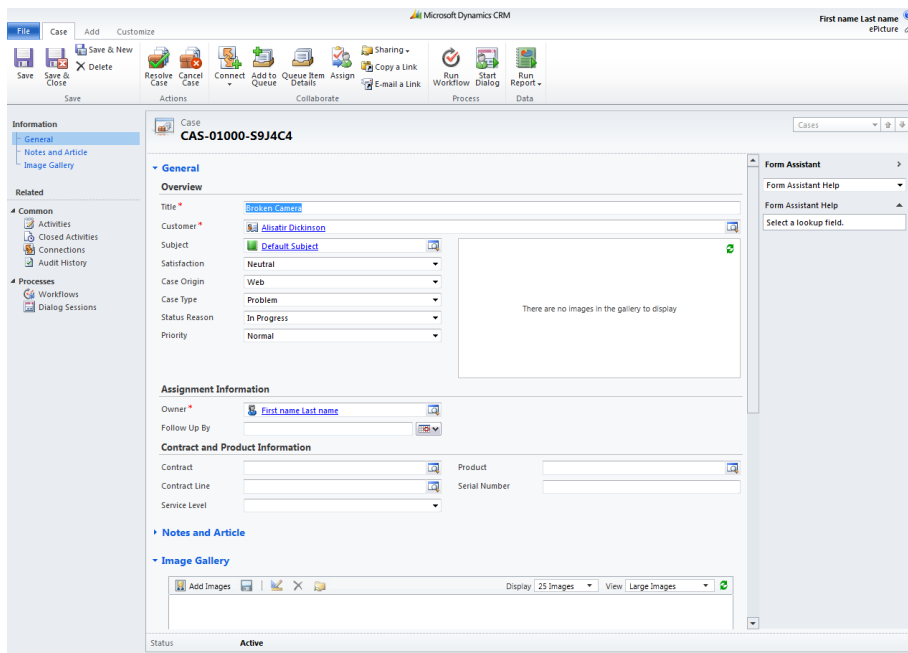
Save and publish the form and this completes the customisation of the web resource.



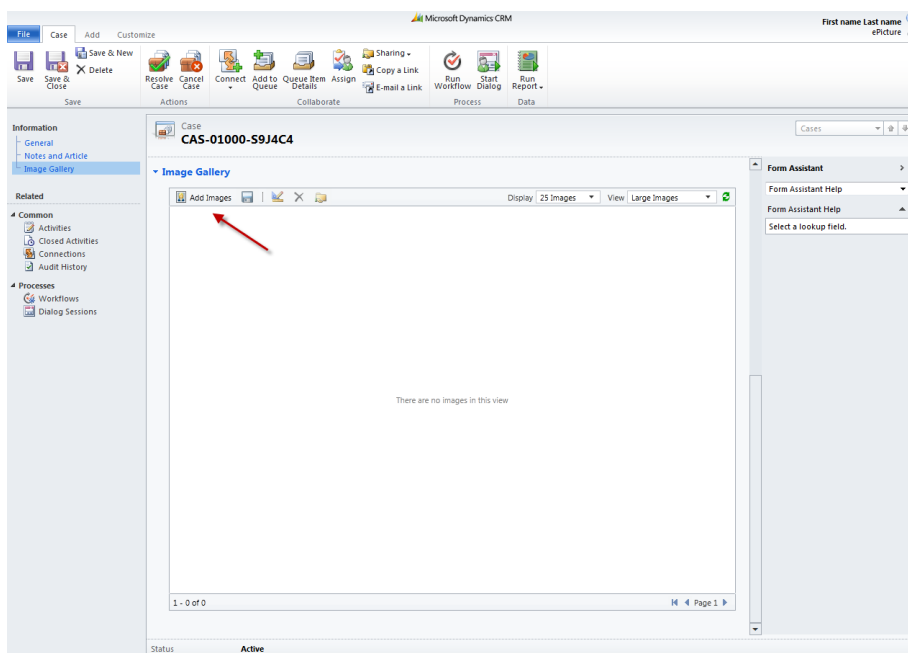
Adding Images to a Record

Again in this example we use the Case record that we configured above to add an image to a case that has been raised in CRM.

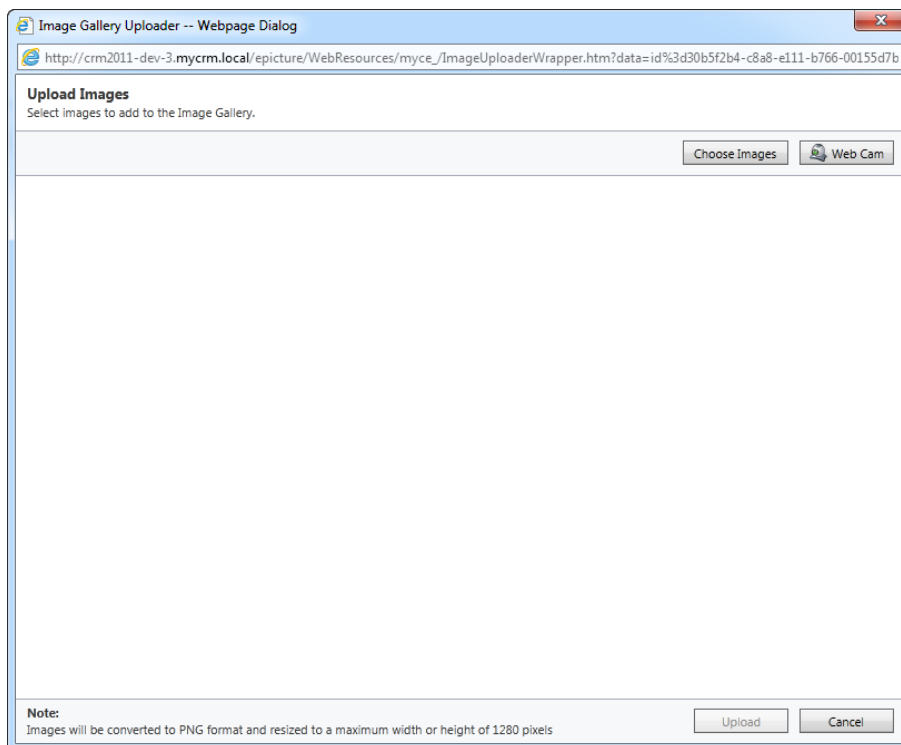
The example below is of a new case that has been created and saved, now an image is going to be added



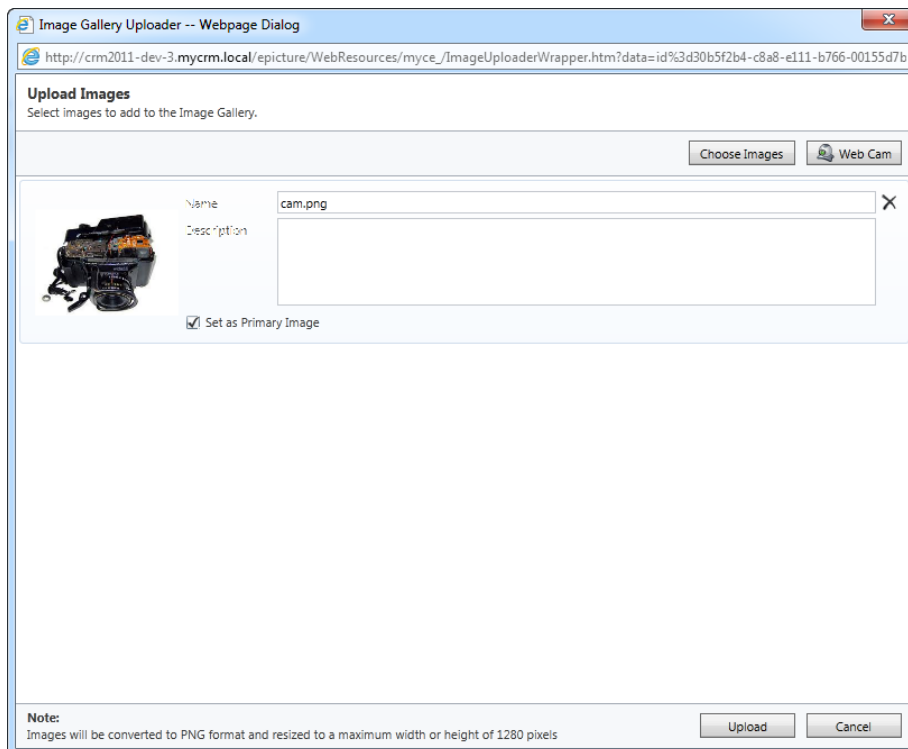
From the Top left navigate to the Image Gallery and select the “Add Image” on the tool bar



Select the add images and the following Screen is displayed



In this example we select images from the Hard Drive but if a webcam is connected this can be used to capture images



Once the image is selected the primary setting can be set and the image uploaded to CRM, please note multiple image uploads is supported in ePicture



Once the picture is uploaded the Case record will refresh and the picture will be displayed.

