



IMPORT GUIDE

PowerPhoto

CRM 2013/2015



Service



Support



Education



Add-ons

Contents

Import

Register

Configure

Add, Remove, Set Default, Set Record Image, Thumbnail & View Text

Display Original File

Save Original File

Resize Photo

Resize Height

Resize Width

Maximum File Size

Security Roles

Supported Browsers

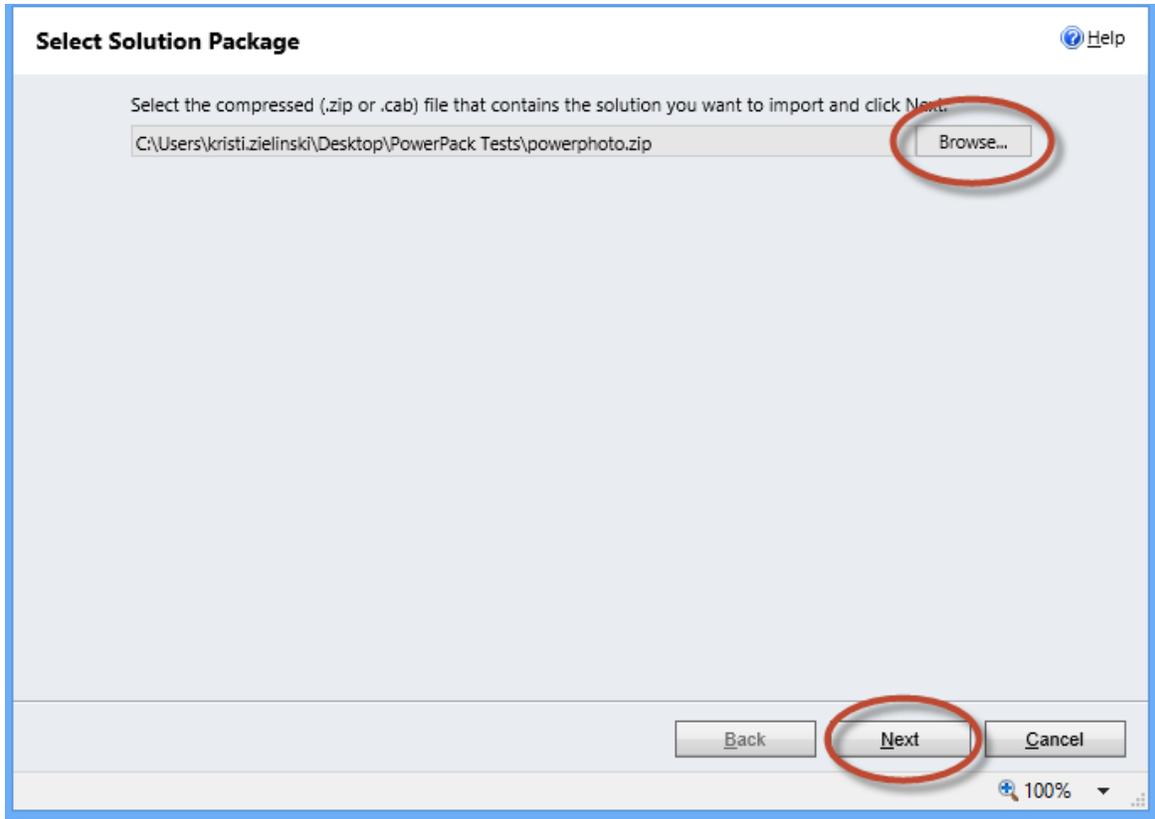
Uninstalling PowerPhoto



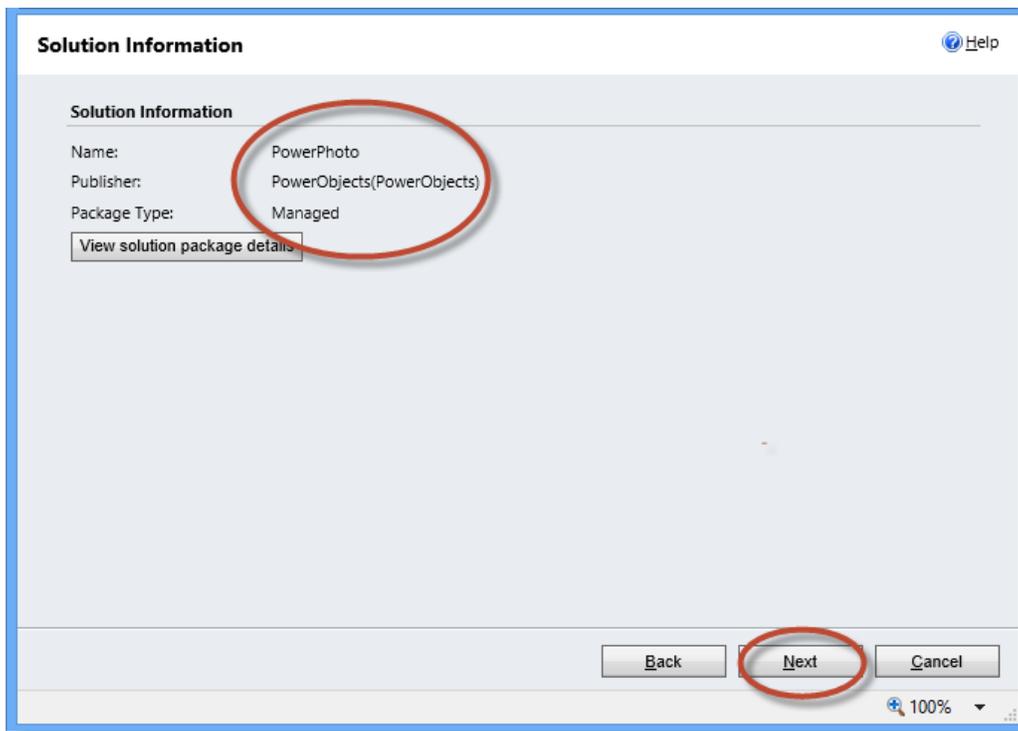
Import

The first step to installing any managed solution in Microsoft Dynamics CRM is to locate the file you want to install, download it and place it on your computer. In this instance, you would go to the PowerPhoto webpage, click on Download Solution and save the file in a convenient place on your computer.

After you're done with that, log in to your Microsoft Dynamics CRM 2013 as a System Administrator or System Customizer – you must have administrative privileges. Navigate to Settings > Solutions and click on Import. The next window that opens will let you browse for the solution you are importing – navigate to the file, select it and click Next.

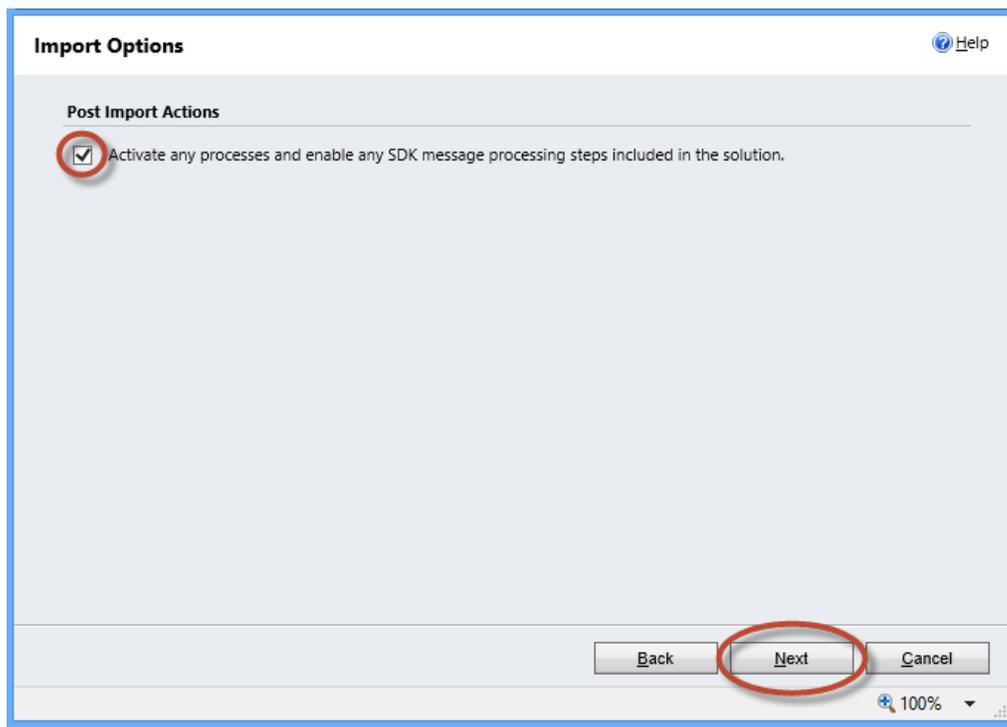


The next screen that opens up will show the Name / Publisher / Package Type of the solution you are installing. This screen should show PowerPhoto from PowerObjects.

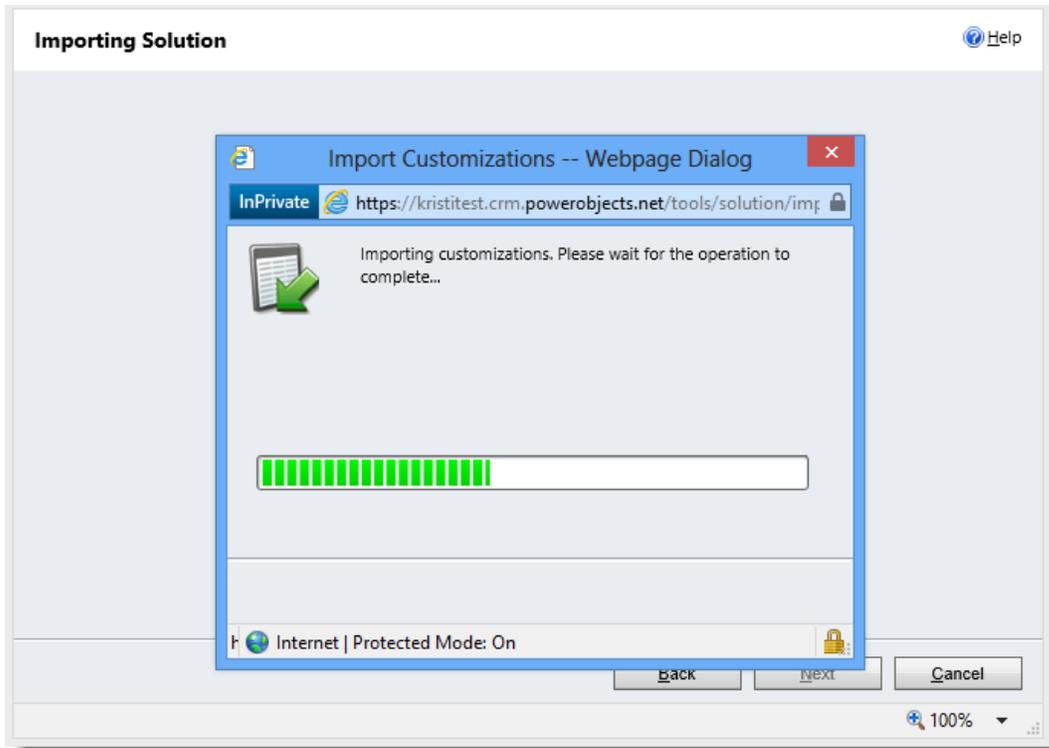


Click Next, and make sure to check the "Activate all processes..." checkbox, and click Next

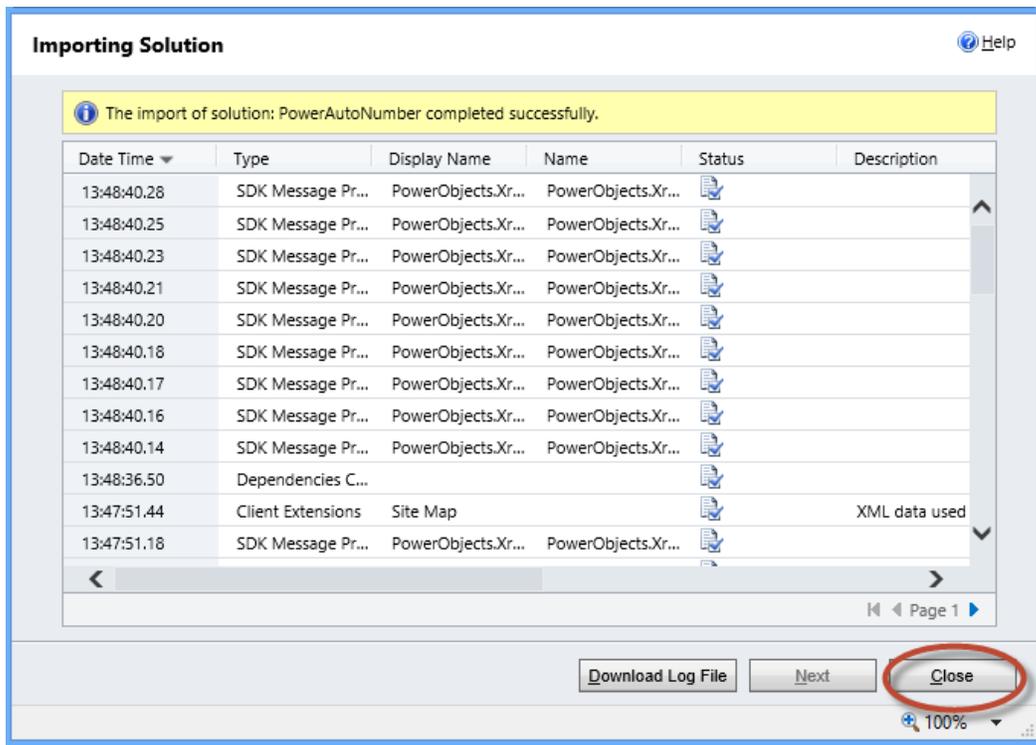
IMPORTANT: *If you do not check this box, the add-on WILL NOT FUNCTION CORRECTLY!*



A green progress indicator will display while the solution imports.



Once the solution is done importing, you will see a screen like the one below. The yellow bar along the top indicates that your solution has imported successfully. Click Close.



Register

In the Solutions Window, double click on PowerPhoto. Fill in your information and click Submit. Be patient while the information is submitted.

The screenshot shows the PowerPhoto configuration window. The top menu bar includes File, Save and Close, Export Solution, Import Translations, Export Translations, Publish All Customizations, Actions, and Help. The main window title is "Solution: PowerPhoto Configuration". On the left is a navigation tree with categories like Information, Configuration, Components, Entities, Option Sets, Client Extensions, Web Resources, Processes, Plug-in Assemblies, Sdk Message Processing S..., Service Endpoints, Dashboards, Reports, Connection Roles, Article Templates, Contract Templates, Email Templates, Mail Merge Templates, Security Roles, and Field Security Profiles. The main content area is titled "POWER OBJECTS" and has two tabs: "Profile" and "Setup". A red arrow points to the "Submit" button in the "Profile" tab. Below the "Submit" button are radio buttons for "Try" (selected) and "Subscribe". The "General" section contains the following form fields:

First Name *	PowerPack	Last Name *	Pro
Company *	PowerObjects	Main Phone *	612-339-3355
Email *	powerpackpro@powerobjects.com	State/Province *	MN
Address *	718 Washington Ave. N	Postal Code *	55401
City *	Minneapolis	Country *	USA

At the bottom left, it says "Status: Existing".

You are now registered for your free 30 day trial! For directions on how to use PowerPhoto, please reference the PowerPhoto user guide, which can be found on the [PowerPhoto web page](#).

Configure

By default, PowerPhoto images are compressed and saved with a maximum pixel height of 305 and a maximum pixel width of 225 while preserving the image's aspect ratio. If you'd like to change the maximum height or width, you can change these settings in the PowerPhoto Setup tab.

Solution: PowerPhoto

Configuration

Solution PowerPhoto

Information
Configuration
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing S...
Service Endpoints
Dashboards
Reports
Connection Roles
Article Templates
Contract Templates
Email Templates
Mail Merge Templates
Security Roles
Field Security Profiles

POWER OBJECTS

Status: Trial Expires: 1/12/2014

Profile: Setup

Save | Reset | Help

Add Text	Add	This will change the name "Add" on all PowerPhoto Controls.
Remove Text	Remove	This will change the name "Remove" on all PowerPhoto Controls.
Set Default Text	Set Default	This will change the name "Set Default" on all PowerPhoto Controls.
Set Record Image Text	Set Record Image	This will change the name "Set Record Image" on all PowerPhoto Controls.
Thumbnail Text	Thumbnail	This will change the name "Thumbnail" on all PowerPhoto Controls.
View Text	View	This will change the name "View" on all PowerPhoto Controls.
Display Original File	<input type="checkbox"/>	Display the original file in PowerPhoto. (May impact performance)
Save Original File	<input type="checkbox"/>	Save the original image in addition to the resized image. (Impacts disk space)
Resize Photo	<input checked="" type="checkbox"/>	Resize the stored image to save disk space. (May affect image quality)
Resize Height	305	Maximum image height in pixels. (Preserves aspect ratio)
Resize Width	225	Maximum image width in pixel. (Preserves aspect ratio)
Maximum File Size	5,120.00	The maximum size of the file to be uploaded in kilobytes. (KB)

Status: Existing

Add, Remove, Set Default, Set Record Image, Thumbnail & View Text

In the PowerPhoto control, you will have words displayed - Add, Remove, View, Thumbnail, Set Default and Set Record Image. You can change the words that are displayed in the control by changing the wording here, in the setup tab of the PowerPhoto solution. This feature is designed to support foreign languages.

Example of the PowerPhoto control, and the text that can be changed:



Display Original File

Selecting 'Yes' will display the original uncompressed file instead of the resized image in the PowerPhoto control on the CRM form.

Displaying the original file may impact performance due to the potentially large size of images. To ensure optimal performance, the recommended setting for this option is 'No'.

Save Original File

Selecting 'Yes' will store the original image in addition to the resized image. This allows for utilization of the uncompressed image to be used in reporting and other processes.

Resize Photo

Controls whether or not the image dragged into the PowerPhoto control should be resized and compressed to save disk space. Selecting 'Yes' will resize the dragged image to the maximum pixel dimensions specified in the Resize Height and Resize Width options.

To ensure optimal performance PowerObjects recommends that this value be set to 'Yes' and that the resized image should not be larger than 1 megabyte (MB) in size. Should the need arise to save an image larger than 1 MB, the Save Original File option should be set to 'Yes'.

Resize Height

Represents the maximum pixel height that a dragged image will be resized to while preserving the original image's aspect ratio.

Resize Width

Represents the maximum pixel width that a dragged image will be resized to while preserving the original image's aspect ratio.

Maximum File Size

This option displays CRM's maximum file upload setting as defined in CRM's E-mail settings. PowerPhoto will not store an uncompressed image that is larger than the value defined in this field. Images larger than this value can be saved if they are resized to less than 1MB as defined by the image resizing options described above.

To modify this value, manually access CRM's E-mail settings by navigating to Settings > Administration > System Settings and selecting the E-mail tab. Change the value listed for Maximum file size and click OK.

Note: *The maximum value that can be entered in CRM's E-mail settings is defined by the CRM server that hosts the CRM organization. **Always consult your system administrator before making changes to CRM settings.***



System Settings

Set system-level settings for Microsoft Dynamics CRM.

General | Calendar | Formats | Auditing | **Email** | Marketing | Customization | Outlook | Reporting | Goals

Maximum number of subject keywords for recipients: 20
Maximum difference allowed between subject keywords: 0
Minimum number of recipients required to match: 2

Set tracking options for emails between CRM users
CRM email messages sent between CRM users can be tracked as two activities: an outgoing email activity and an incoming email activity. This will not occur if all CRM recipients are configured for sender-based matching only.
 Track emails sent between CRM users as two activities

Set Email form options
Use secure frames to restrict email message content: Yes No
Allow messages with unresolved email recipients to be sent: Yes No

Set file size limit for attachments
Maximum file size (in kilobytes): 5,120

Configure alerts
Select the alerts to send to Microsoft Dynamics CRM users.
 Error
 Warning
 Information
Specify if you want to notify the mailbox owner about an email server profile alert. The email server profile owner will also be notified.
 Notify mailbox owner

OK Cancel

Once you are finished editing these settings, remember to click Save. You can also choose to set the settings back to their defaults, by clicking the "Reset" button.

Security Roles

Every user who would like to have access to PowerPhoto will need the PowerPhoto User security role assigned to them. System Administrators will automatically see PowerPhoto and be able to use PowerPhoto, even without having the security role assigned.

Manage User Roles [X]

What roles would you like to apply to the 1 User you have selected?

Role Name	Business Unit
<input type="checkbox"/> Delegate	pppowerphoto2013
<input type="checkbox"/> Marketing Manager	pppowerphoto2013
<input type="checkbox"/> Marketing Professional	pppowerphoto2013
<input checked="" type="checkbox"/> PowerPhoto User	pppowerphoto2013
<input type="checkbox"/> Sales Manager	pppowerphoto2013
<input type="checkbox"/> Salesperson	pppowerphoto2013

OK Cancel

Supported Browsers

The following browser versions support uploading files via HTML, which is what PowerPhoto does. If you will be using a browser that is not listed below, then you may want to consider using the “.2011” version of PowerPhoto, which uses Silverlight to upload photos instead of HTML. If your browser does not support uploading images via HTML, you will still be able to use PowerPhoto, just not to upload images.

- IE10+
- Firefox 3.6+
- Chrome 6+
- Safari 6+
- Opera 11.1+

Uninstalling PowerPhoto

To uninstall, first remove the PowerPhoto control from your forms. Then uninstall as usual, by deleting the solution. Deleting the solution will remove all images and data related to PowerPhoto.

Thanks for your interest in PowerPhoto. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of import. If you are interested in subscribing, go back to the configuration screen and change “try” to “subscribe” and enter your credit card information – you will be charged \$1/CRM user/month.

Interested in more CRM tips and tricks? Check out [blog](#) or subscribe to our [newsletter](#).

