



Document Bulk Uploader

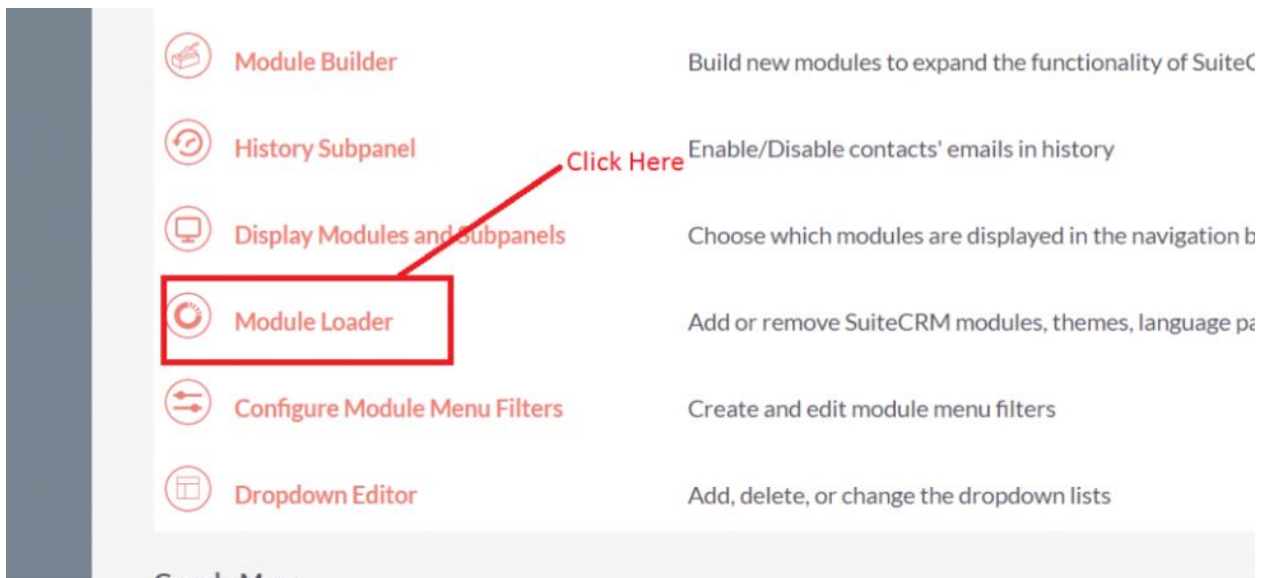
Pre-requisites

Please follow the below steps before installing the Document Bulk Uploader.

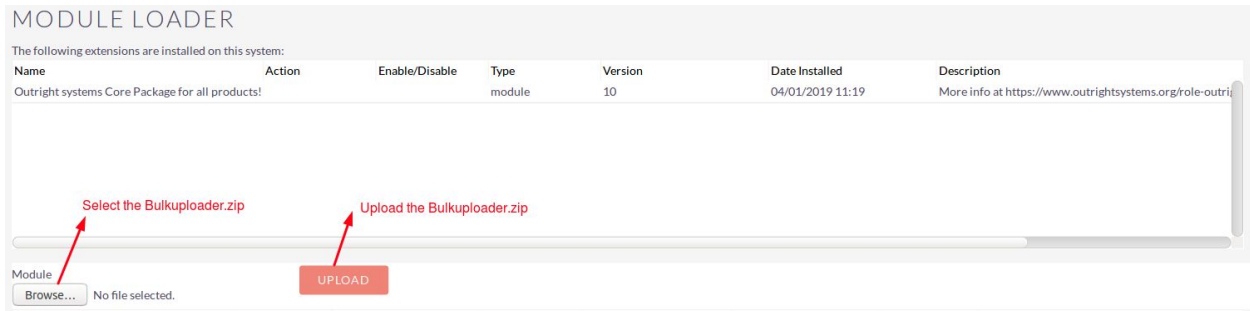
1. Log in as an Administrator.
2. Verify the CRM version should be compatible with Document Bulk Uploader.
3. CRM should have the Outright utils file, if not then install the Outright Utils package first then install Document Bulk Uploader.
4. Log in as an Administrator.
5. Verify the CRM version should be compatible with Document Bulk Uploader.
6. CRM should have the Outright utils file, if not then install the Outright Utils package first then install Document Bulk Uploader.

Installation Guide:-

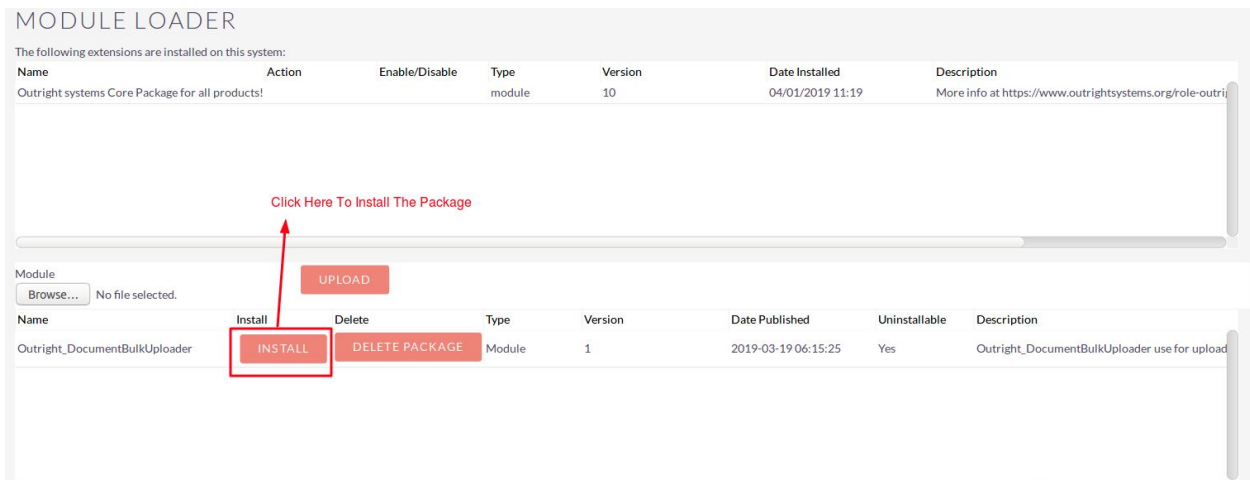
1. Go to the Administration page.
2. Click on “**Module Loader**” to install the package.



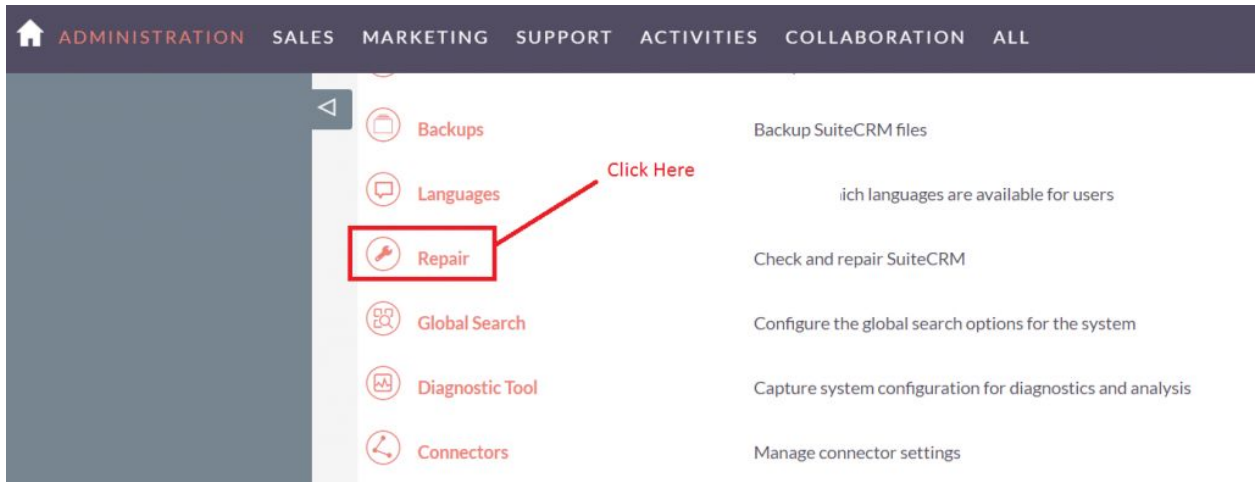
3. Click on "**Choose File**" button and select the BulkUploader.zip



4. Click on "**Upload**" to upload the file in CRM and then click on the Install button.



5. Again go to the Administration page and click on repair.



6. Click on "Quick Repair and Rebuild" and click on execute button.

NOTE: any changes you make to the script in the textbox will be reflected in the exported or executed code.

```
/* Table : outr_bulk_uploader */
/* MISSING TABLE: outr_bulk_uploader */
CREATE TABLE outr_bulk_uploader (id char(36) NOT NULL ,name varchar(255) NULL ,date_entered datetime
NULL ,date_modified datetime NULL ,modified_user_id char(36) NULL ,created_by char(36) NULL ,description text
NULL ,deleted bool DEFAULT '0' NULL ,assigned_user_id char(36) NULL ,document_type varchar(100) NULL
,category varchar(100) NULL ,sub_category varchar(100) NULL , PRIMARY KEY (id)) CHARACTER SET utf8
COLLATE utf8_general_ci;
/* Table : outr_bulk_uploader_documents_1_c */
/* MISSING TABLE: outr_bulk_uploader_documents_1_c */
CREATE TABLE outr_bulk_uploader_documents_1_c (id varchar(36) NOT NULL ,date_modified datetime NULL
,deleted bool DEFAULT '0' NULL ,outr_bulk_uploader_documents_1outr_bulk_uploader_ida varchar(36) NULL
,outr_bulk_uploader_documents_1documents_idb varchar(36) NULL ,document_revision_id varchar(36) NULL ,
PRIMARY KEY (id), KEY outr_bulk_uploader_documents_1_ida1
(outr_bulk_uploader_documents_1outr_bulk_uploader_ida), KEY outr_bulk_uploader_documents_1_alt
(outr_bulk_uploader_documents_1documents_idb)) CHARACTER SET utf8 COLLATE utf8_general_ci;
/* Table : accounts_outr_bulk_uploader_1_c */
/* MISSING TABLE: accounts_outr_bulk_uploader_1_c */
CREATE TABLE accounts_outr_bulk_uploader_1_c (id varchar(36) NOT NULL ,date_modified datetime NULL
,deleted bool DEFAULT '0' NULL ,accounts_outr_bulk_uploader_1accounts_ida varchar(36) NULL
,accounts_outr_bulk_uploader_1outr_bulk_uploader_idb varchar(36) NULL , PRIMARY KEY (id), KEY
accounts_outr_bulk_uploader_1_ida1 (accounts_outr_bulk_uploader_1accounts_ida), KEY
accounts_outr_bulk_uploader_1_alt (accounts_outr_bulk_uploader_1outr_bulk_uploader_idb)) CHARACTER SET
utf8 COLLATE utf8_general_ci;
```

[Click Here to execute above query](#)

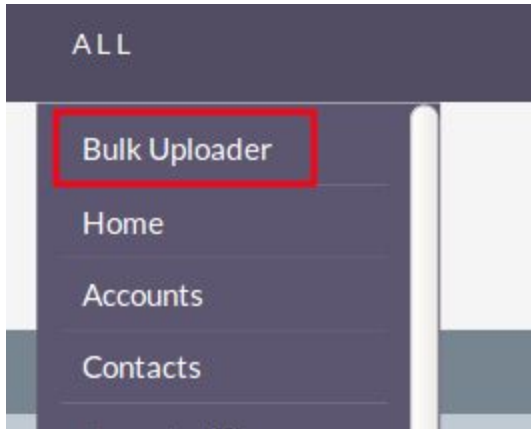
EXECUTE

EXPORT

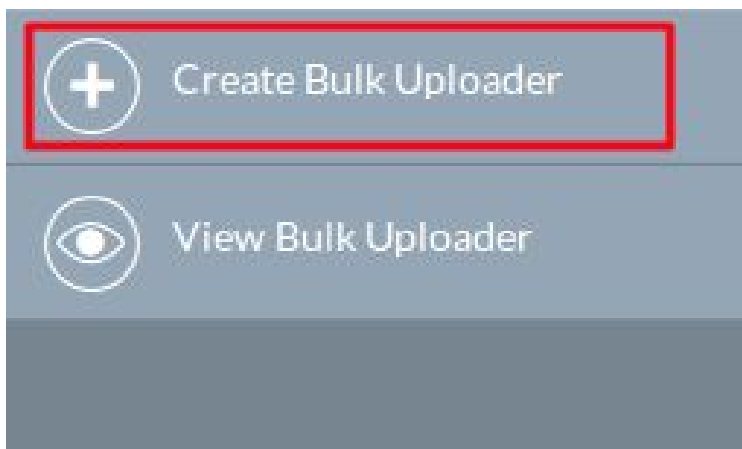
NOTE: after installing each plugin, It is mandatory to repair and execute.

User Guide:-

1 Go to the All tab and click on Bulk Uploader.



2. Click on create bulk uploader.



3. Fill the Category, Subcategory, Document Type and save the record.

CREATE

SAVE CANCEL

BASIC

Name: Test Assigned to: Administrator

Category: Marketing → Select Category Sub Category: Marketing Collateral → Select Sub category

Document Type: Mail Merge → Select Document type

SAVE CANCEL

4. In detail view Click on Bulk Uploader.

TEST ☆

BASIC ACTIONS **Bulk Uploader** → Hit The bulk Uploader Button

Name: Test Assigned to: Administrator

Date Created: 04/01/2019 Date Modified: 04/01/2019

Category: Marketing Sub Category: Marketing Collateral

Document Type: Mail Merge Accounts:

DOCUMENTS

Name	File	Category	Status	Publish Date
Create				

No results found.

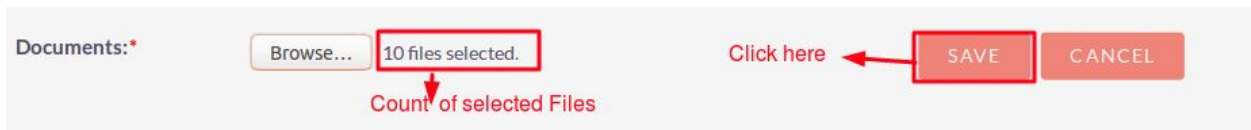
5. Select the Multiple documents to upload.

Documents:*

Browse... → Select Multiple Documents No files selected.

SAVE CANCEL

6. Selected documents count will appear here save the record simply.



7. See the All uploaded document in subpanel.

