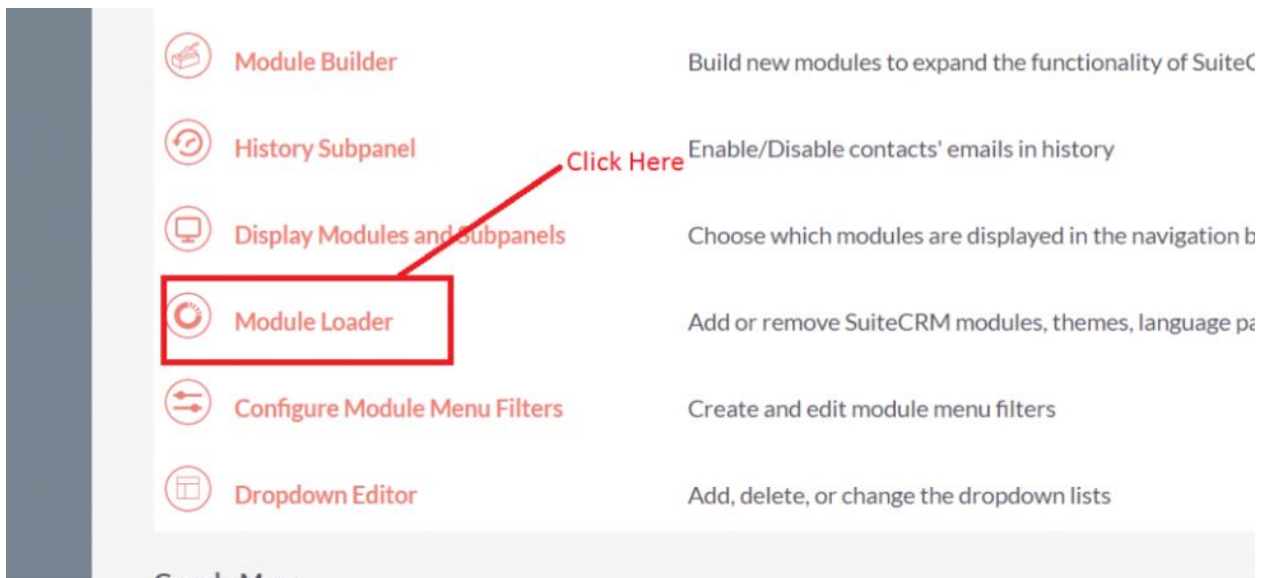# Document Bulk Uploader

Pre-requisites

Please follow the below steps before installing the Document Bulk Uploader.
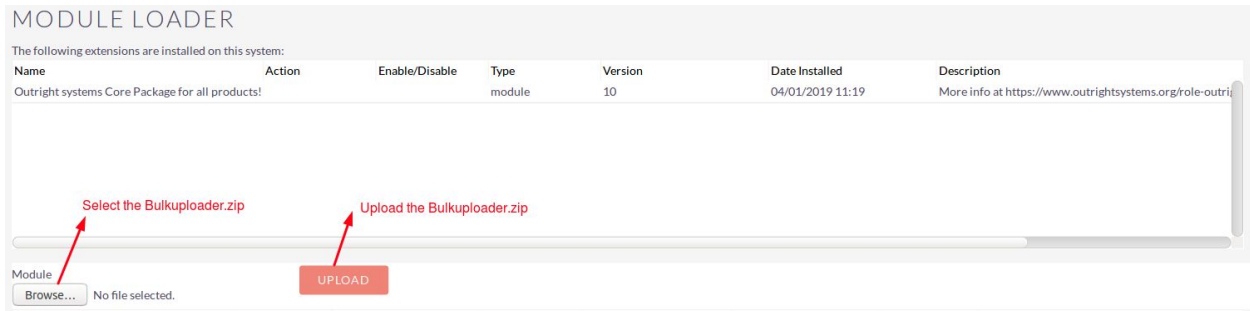
1. Log in as an Administrator.
2. Verify the CRM version should be compatible with Document Bulk Uploader.
3. CRM should have the Outright utils file, if not then install the Outright Utils package first then install Document Bulk Uploader.
4. Log in as an Administrator.
5. Verify the CRM version should 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.
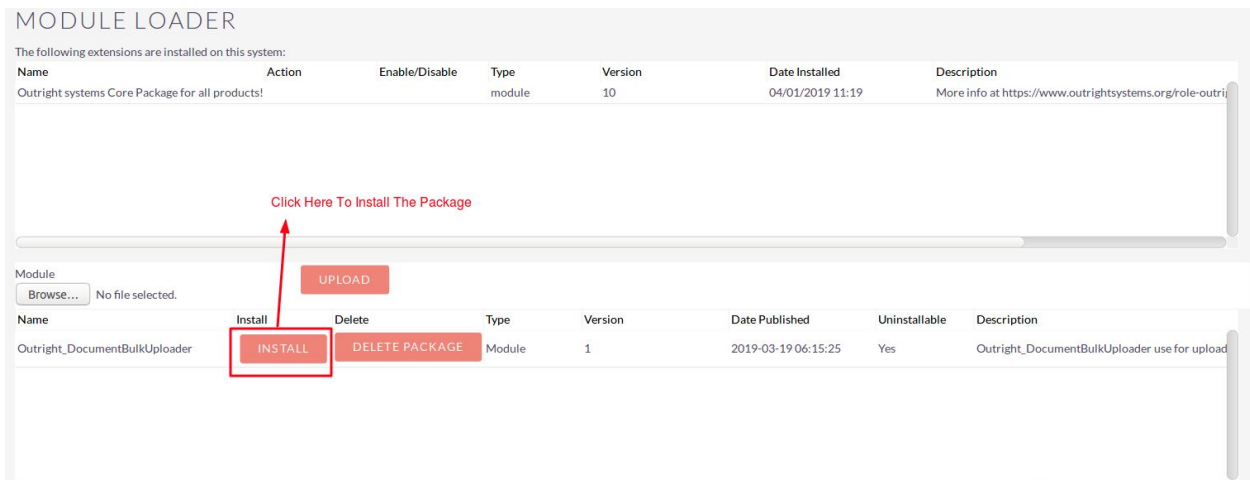
Installation Guide:-

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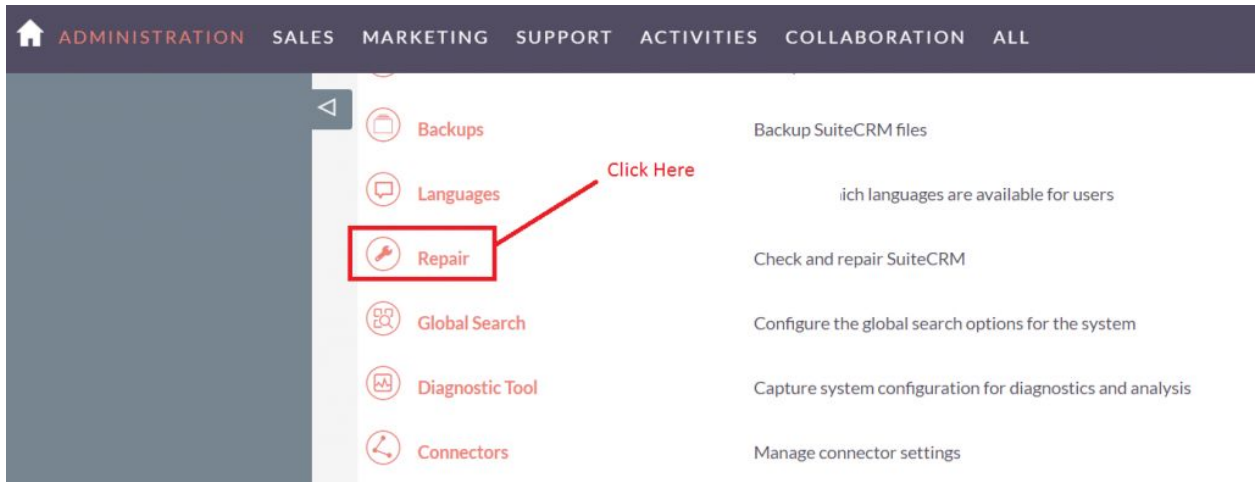

3. Click on "**Choose File**" button and select the BulkUploader.zip

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.

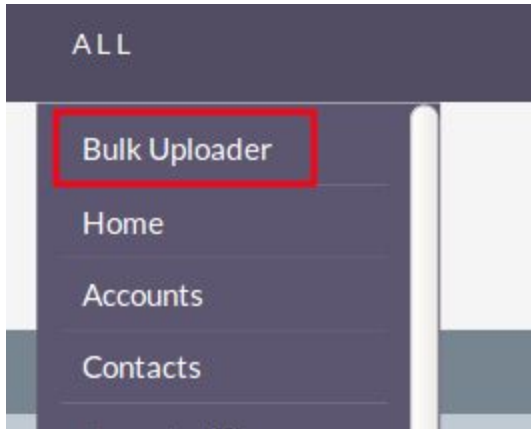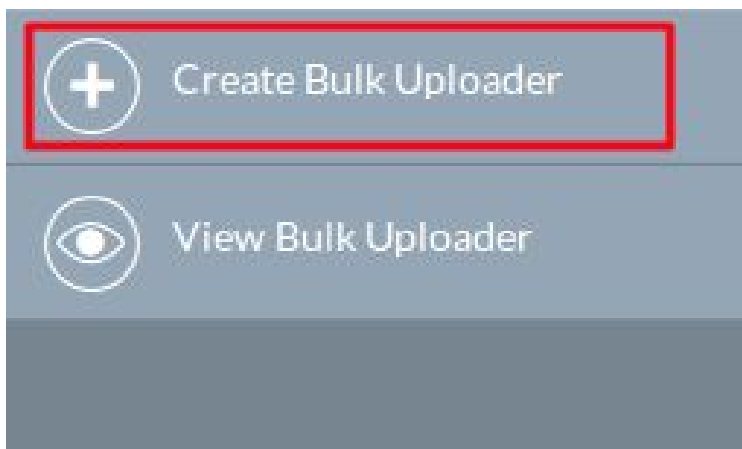6. Click on "**Quick Repair and Rebuild**" and click on execute button.

NOTE: 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 ▾ |◁ ◁ (0 - 0 of 0) ▷ ▷|

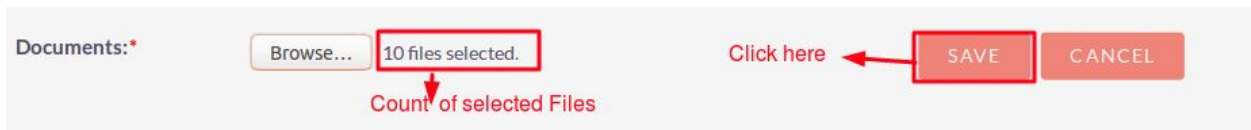No results found.

5. Select the Multiple documents to upload.

Documents:*   Browse...   No files selected.   Select Multiple Documents   SAVE   CANCEL

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

7. See the All uploaded document in subpanel.