# Monkey Upload User Guide

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Three Grey Monkeys

# About

Monkey Upload is a web resource for CRM forms which provides the following capabilities:

- Manage files from any CRM form
- Upload and store any file type
- Image preview in the form
- Download files
- Delete files

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## Setup

### **Import Solution**

### Security Roles

To use Monkey Upload, users must be assigned one of the Monkey Upload security roles. The roles are:

- Monkey Upload Full Access
- Monkey Upload Read Only

For users who should upload or delete files, assign the Monkey Upload - Full Access security role.

For users who should only view or download files, assign the Monkey Upload - Full Access security role.

#### Add to Form

Before Monkey Upload can be used, it must be added to the required form using the form editor, which can be achieved by following the instructions below.

- 1. Navigate to the desired form, such as Account
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3. Once the form editor has loaded, open the "INSERT" tab

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#### 4. Select the "Web Resource" button





- 5. Once the "Add Web Resource" dialog loads, input the following details, then select "OK":
- Web resourcetgm\_/HTML/MonkeyFileManager.htmlNamemonkeyFileManagerLabelMonkey File ManagerDisplay label on the FormTick this if desiredVisible by defaultTick this

	Microsoft   Dynamics 365	
Two Tv lumns Colu 2 Ta	Add Web Resource ? Add an existing web resource to the Form.	× riedge I Search
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A	Web Resource Properties         Custom Parameter(data)         Restrict cross-frame scripting, where supported.         Pass record object-type code and unique identifier as parameters.         Enable for tablet	Add Add Add Add Add
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# Using Monkey File Manager

### Upload

Please note, the security role, *Monkey Upload – Full Access*, is required for this action.

To upload a new file, follow the instructions below.

### 1. Click on the Upload button

#### CONTACT INFORMATION

Full Name*	Brendan Keogh-Smith	Enter post here
Job Title	Managing Director	All posts Auto posts User posts
Account Name	Three Grey Monkeys	Brendan Keogh-Smith
Email		Contact: Created By crm ad
Business Phone		On Brendan Keogh-Smith's
Mobile Phone		louay
Fax		
Preferred Method of (	Any	
Address		

Monkey File Manager	Upload

POSTS ACTIVITIES NOTES

2. Browse your system for the file, then click on the Open button

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### View

All uploaded files will be displayed in the monkey file manager as shown below.

Clicking on a file will show a "preview" and additional options. For example, an image file will be enlarged to fit file manager space and three additional buttons will appear.





### Download

To download a file, simply select a file item, then once the *file preview* loads, select the download button.

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### Delete

Please note, the security role, *Monkey Upload – Full Access*, is required for this action.

To delete a file, simply select a file item, then once the *file preview* loads, select the delete button.

Upload	Download	Delete	Return		
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# Remove the Monkey File Manager from a Form

Removing the Monkey File Manager from a form is simple. To achieve this, follow the instructions below.

- 1. Navigate to the desired form
- 2. From the taskbar, select the Form button
- 3. Click on the Monkey File Manager web resource
- 4. Click on the Remove button

# Uninstall Monkey Upload

Uninstalling Monkey Upload from your CRM system is simple. To achieve this, follow the instructions below.

- 1. Navigate to Settings > Solutions
- 2. Click on MonkeyUpload
- 3. Click on the Delete button in the Taskbar

