

# 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.

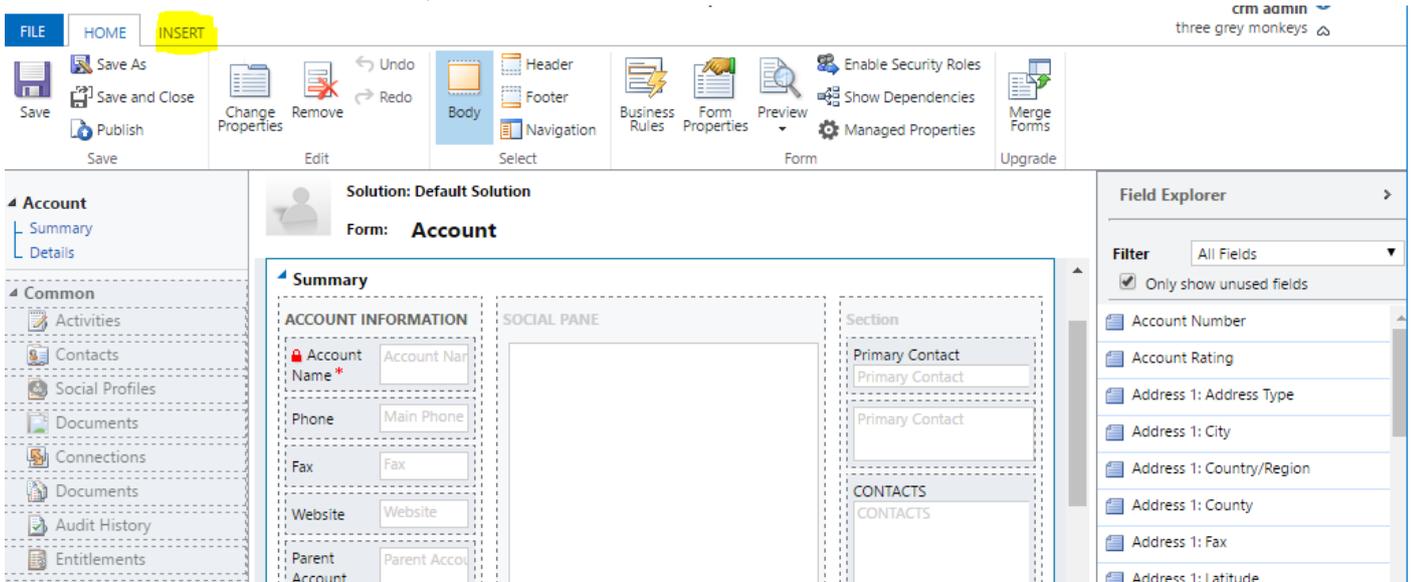
### Add to Form

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.

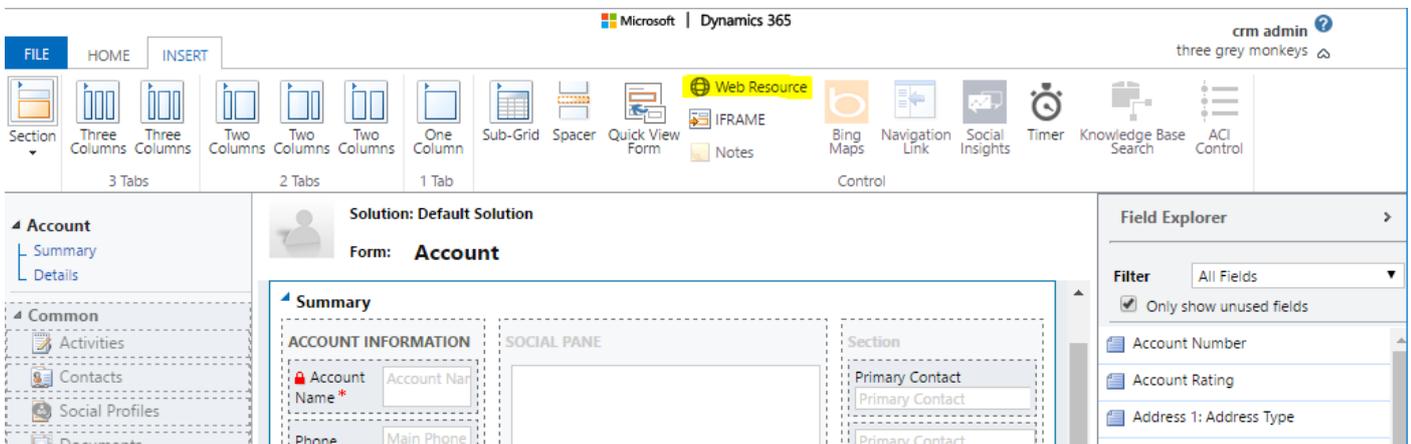
1. Navigate to the desired form, such as Account
2. From the taskbar, select the "Form" button

The screenshot displays the Dynamics 365 user interface. At the top, the navigation bar shows 'Dynamics 365' and 'Sales'. The breadcrumb trail indicates the current location: 'Accounts > Three Grey Monkeys >'. The taskbar below the navigation bar contains several action buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'FORM' (highlighted in yellow), 'PROCESS', and a menu icon. Below the taskbar, the 'ACCOUNT' page for 'Three Grey Monkeys' is visible. The page header includes the account name and a menu icon. To the right, summary statistics are shown: 'Annual Revenue' (..), 'No. of Employees' (..), and 'Owner' (crm admin). The main content area is titled 'Summary' and is divided into several sections: 'ACCOUNT INFORMATION' (Account Name: Three Grey Monkeys, Phone: .., Fax: .., Website: .., Parent Account: .., Ticker Symbol: ..), 'ADDRESS' (..), 'POSTS' (with a 'POST' button and a recent post from 'Three Grey Monkeys' dated 11/28/2016 3:31 PM), 'ACTIVITIES', 'NOTES', 'Primary Contact' (..), 'CONTACTS' (No Contact records found), 'RECENT OPPORTUNITIES' (No Opportunity records found), and 'RECENT CASES'.

3. Once the form editor has loaded, open the "INSERT" tab

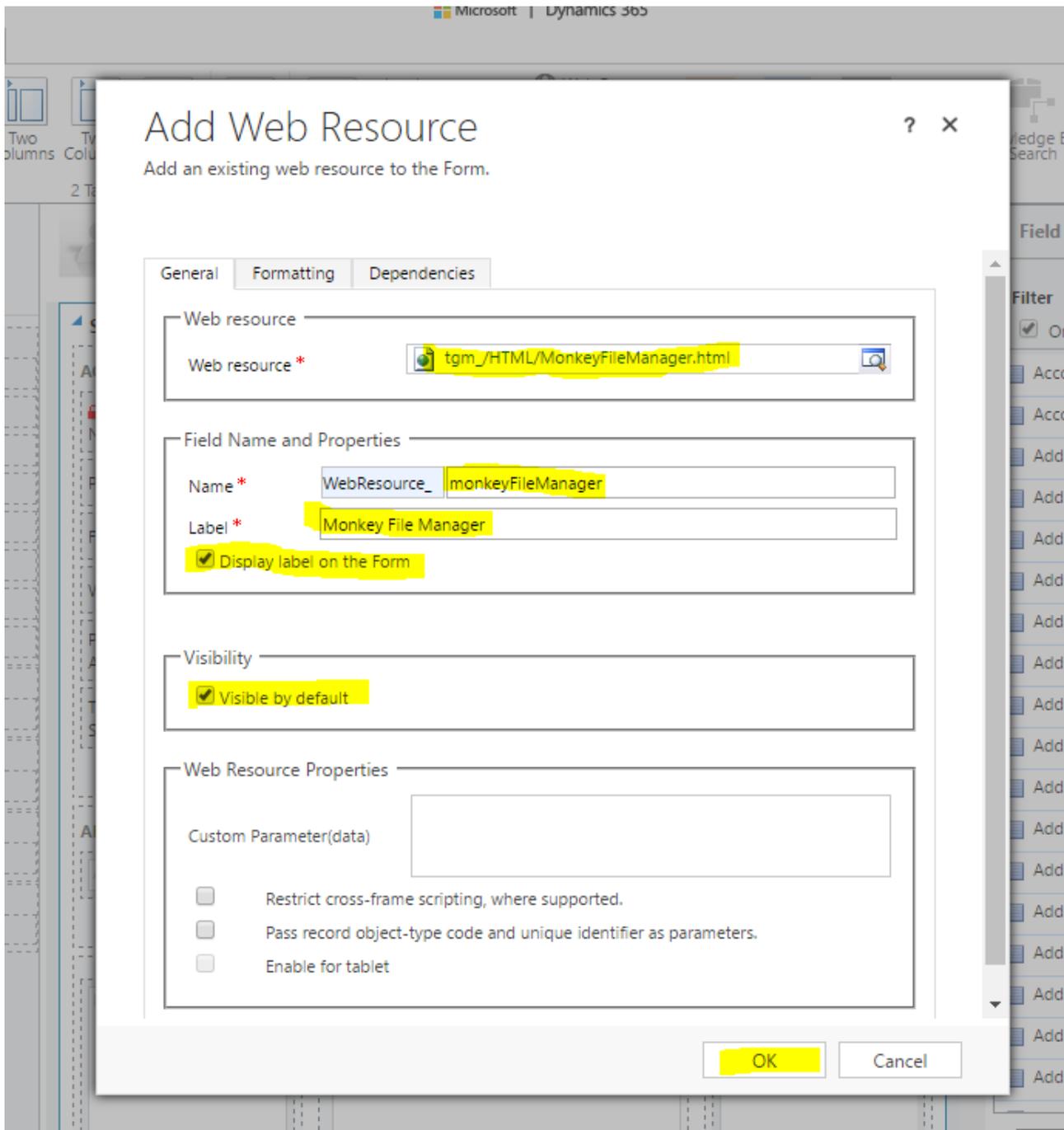


4. Select the "Web Resource" button



5. Once the “Add Web Resource” dialog loads, input the following details, then select “OK”:

<i>Web resource</i>	tgm_/HTML/MonkeyFileManager.html
<i>Name</i>	monkeyFileManager
<i>Label</i>	Monkey File Manager
<i>Display label on the Form</i>	Tick this if desired
<i>Visible by default</i>	Tick this



## Using Monkey File Manager

### Upload

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

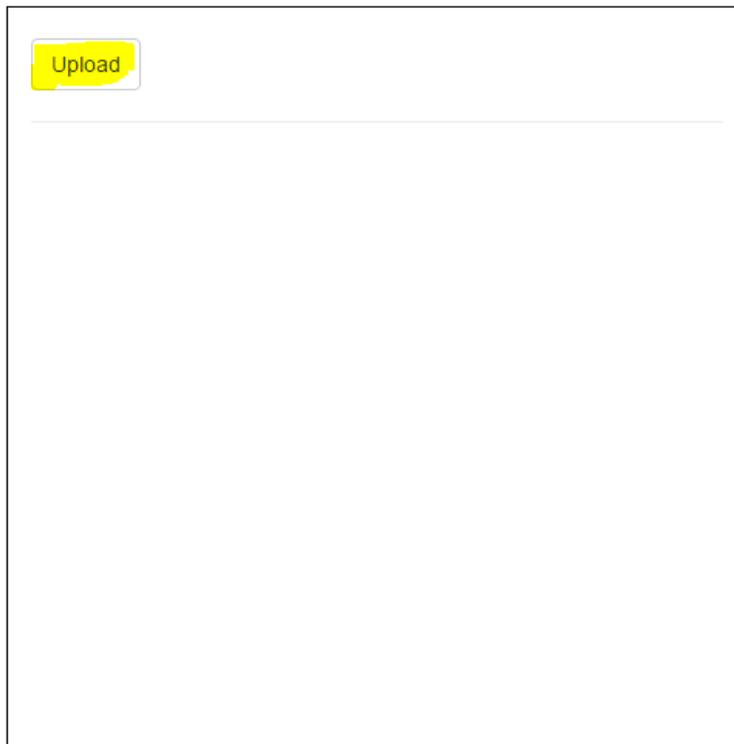
To upload a new file, follow the instructions below.

1. Click on the *Upload* button

#### CONTACT INFORMATION

Full Name*	<b>Brendan Keogh-Smith</b>
Job Title	<b>Managing Director</b>
Account Name	 <b>Three Grey Monkeys</b>
Email	--
Business Phone	--
Mobile Phone	--
Fax	--
Preferred Method of C	<b>Any</b>
Address	--

Monkey File Manager



#### POSTS ACTIVITIES NOTES

Enter post here

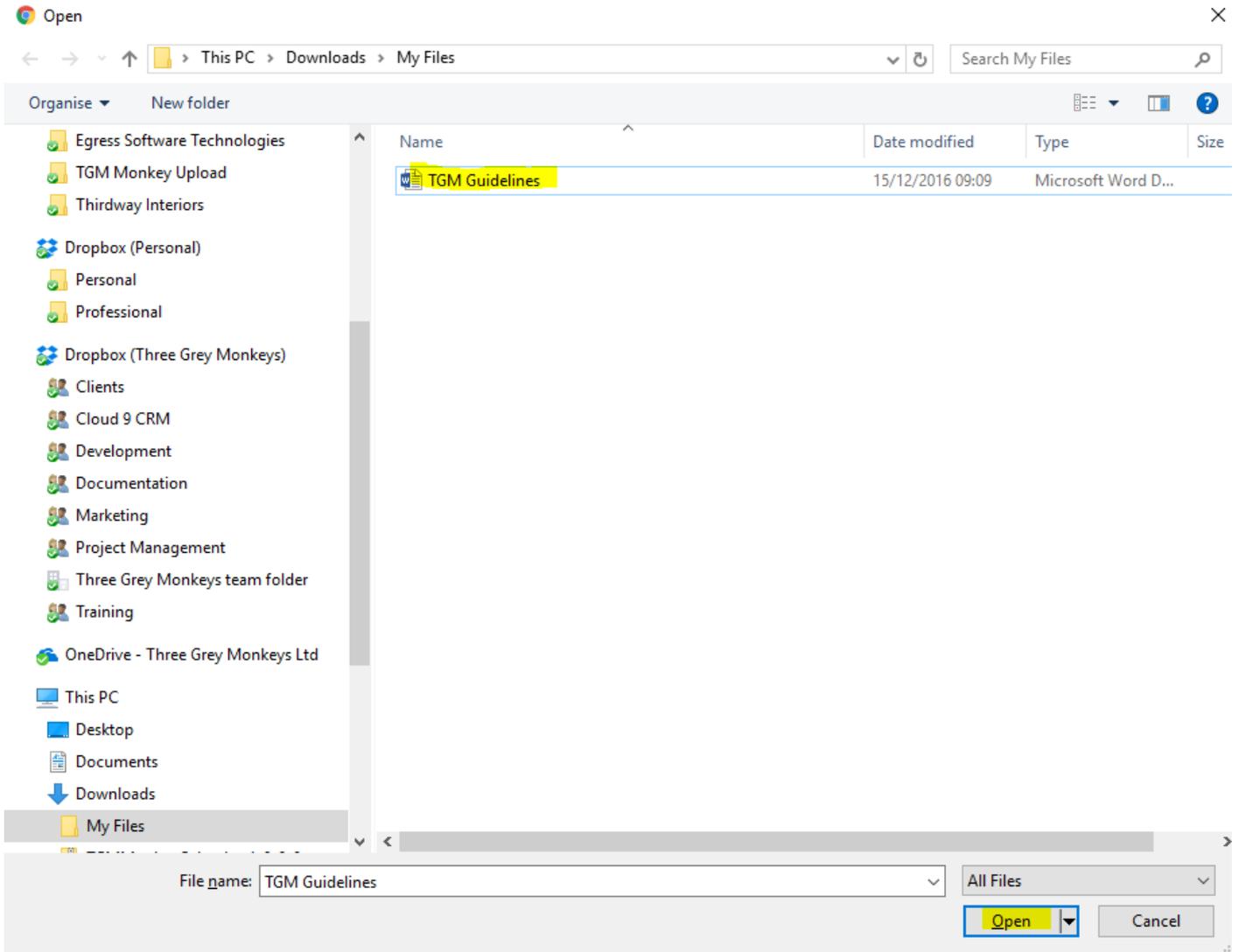
All posts Auto posts User posts



**Brendan Keogh-Smith**  
Contact: Created By *crm ad*  
On *Brendan Keogh-Smith's*  
Today

## User Guide

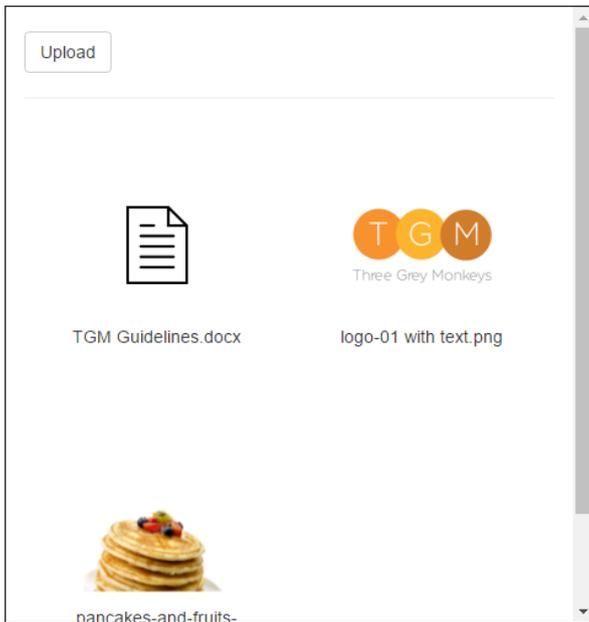
2. Browse your system for the file, then click on the *Open* button



### 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.



## 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.



## 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