



# Price List Utilities

For Dynamics CRM 2013



Installation Guide

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## ***What's In This Manual***

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This manual provides guidelines for installing and configuring the Price List Utilities add-on for Microsoft Dynamics CRM 2013. It specifies system requirements, contains step-by-step installation guide, gives tips on troubleshooting and describes post installation configuration procedures.

The manual is divided into the following sections:

➤ **Introduction**

In this chapter you can find basic information about Price List Utilities, its licensing and compatibility with Microsoft Dynamics CRM.

➤ **Installation**

In this chapter you can find information about system requirements, how to install and uninstall Price List Utilities. It also contains information about post installation configuration procedures.

## **Introduction**

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This section contains a list of the supported databases and operating environments for Price List Utilities module, as well as the recommended system requirements for servers and client computers.

### **Price List Utilities Overview**

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Price List Utilities is an add-on application specially designed for Microsoft Dynamics CRM. With its intuitive wizard driven interface you will be able to:

- add new price lists to multiple products
- update pricing information globally (by percentage or fixed amount)
- copy price lists from one product to multiple products or from selected price list to another price list
- remove price lists
- import or update price lists from a file
- export price list to a file which can be used later as a source for import

And all of it requires just few simple steps, available directly from Microsoft Dynamics CRM interface.

Written in Silverlight it seamlessly integrates with the latest version of the Microsoft Dynamics CRM 2013. Packaged as managed solution is fully compatible with all types of the deployment (on-premises, live). No client or server side installation needed. This product is licensed per organization.

### **Product Licensing**

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#### **Demo Licenses**

Price List Utilities is licensed per Organization. Demo version is fully functional, but allows only five records to be processed. There are no evaluation licenses for this product.

#### **Compatibility**

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Price List Utilities is compatible with Microsoft Dynamics CRM version 2013, and all installation types (on-premises live, etc).

## ***Installation Instruction***

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In this chapter you can find information about system requirements, how to install and uninstall Price List Utilities on your Microsoft Dynamics CRM server. It also contains information about post installation configuration procedures.

### **System Requirements**

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This chapter contains a list of the supported databases and operating systems, as well as components that must be installed on a server before you can start Price List Utilities installation process.

➤ **Supported client operating systems**

Windows 8 (64-bit and 32-bit versions)  
Windows 7 (64-bit and 32-bit versions)  
Windows Vista SP2 (6-bit and 32-bit versions)

➤ **Supported browsers\***

Internet Explorer 10 (Windows)  
Internet Explorer 9 (Windows)  
Internet Explorer 8 (Windows)  
Latest version of Chrome (Windows)  
Latest version of Firefox (Windows)  
Latest version of Safari (Mac OSX)

*\*) Make sure you that have disabled popup blocker in your browser for the CRM domain (please refer to your browser documentation).*

➤ **Required components**

Silverlight 5.0 (it should install automatically, but can be also installed manually from <http://www.microsoft.com/getsilverlight>).

## Installation

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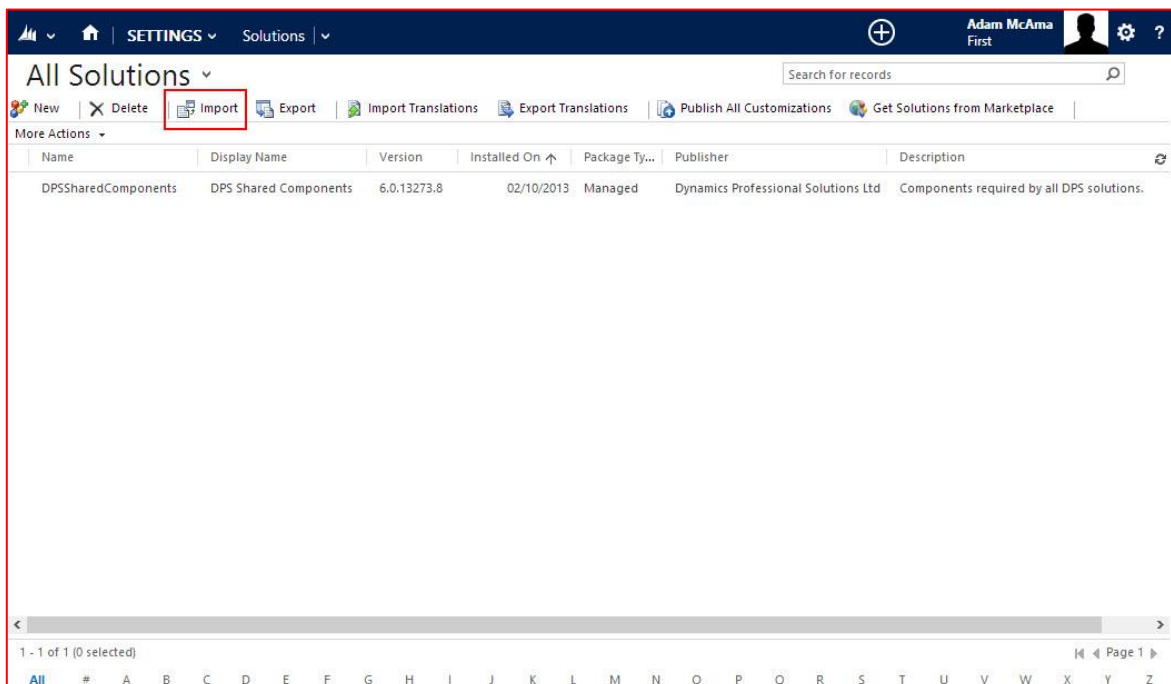
To use Price List Utilities no client or server side installation is needed. Product is packaged as managed solution so you only need to import two compressed (zip) files into your Dynamics CRM deployment. You must have administrator privileges in the Dynamics CRM in order to install this solution.

### 1. Obtain required files

- a. Go to <http://downloads.dynamics-pros.com>
- b. Click on “Download trial versions of our products link” (login will be required) and download the latest version of the Price List Utilities 2013 (PriceListUtilities\_2013.zip).
- c. Unzip PriceListUtilities\_2013.zip. It contains two more zip files (these are the files that you will be importing into Dynamics CRM 2013):
  - i. Shared\_6.0.xxxx.x.zip (import first)
  - ii. PriceListUtilities\_6.0.xxxxx.x.zip (import second)

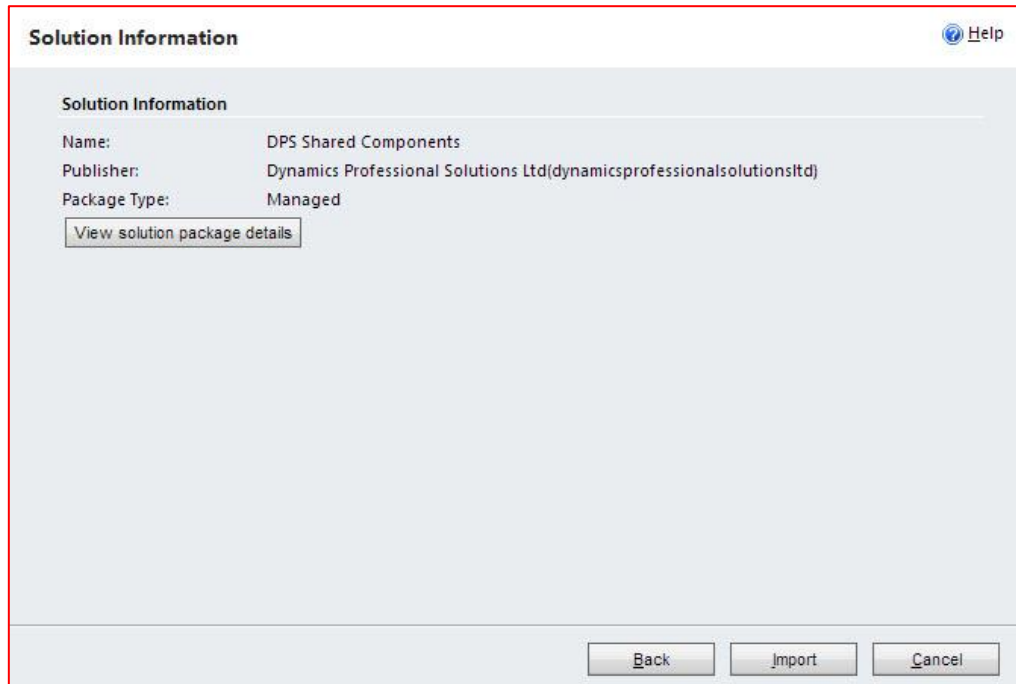
### 2. Import managed solution

- a. Login to your Dynamics CRM and go to Solutions in the Settings Area. Click “Import” option in the toolbar.

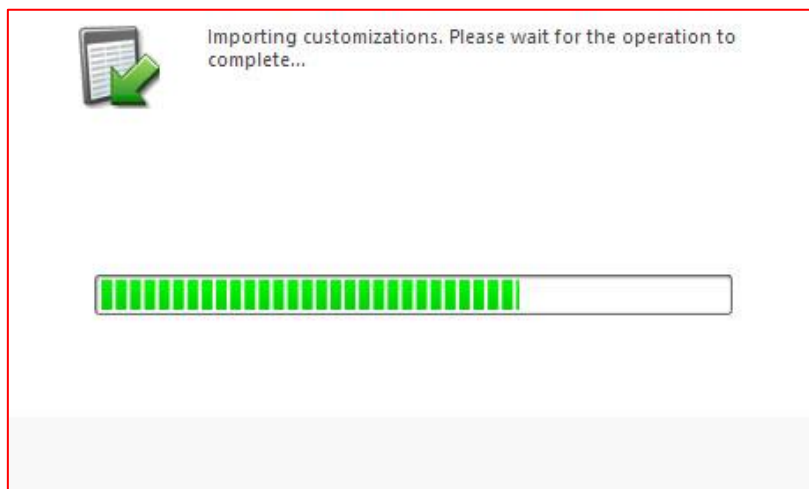




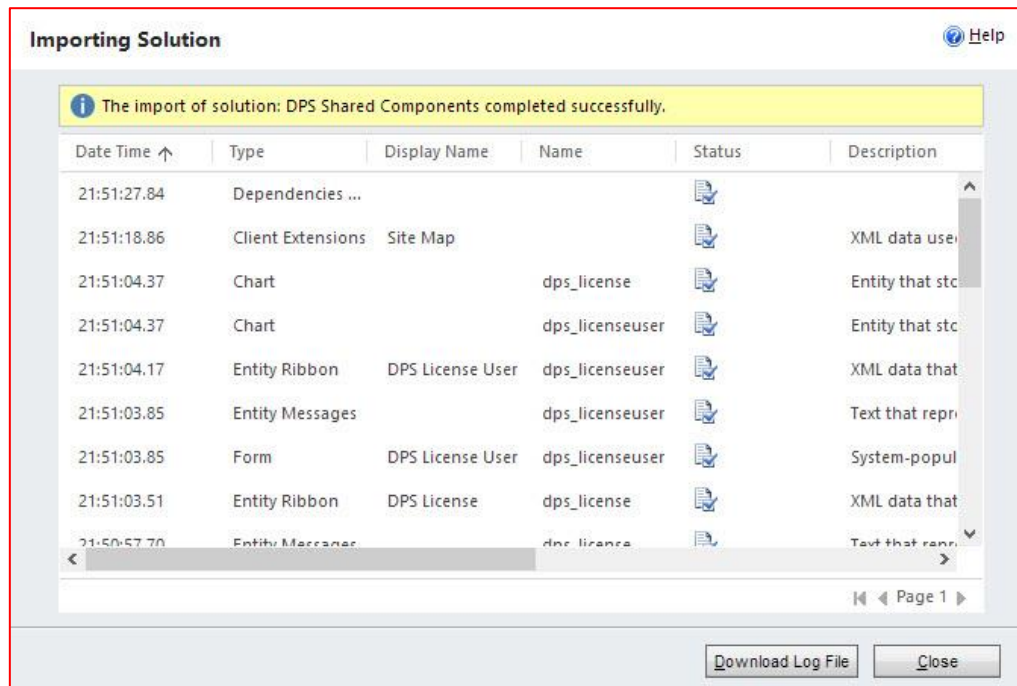
- b. In the Select Solution Package screen select the **Shared\_6.0.xxxx.x.zip** file you have downloaded in the previous step. Click “Next”.



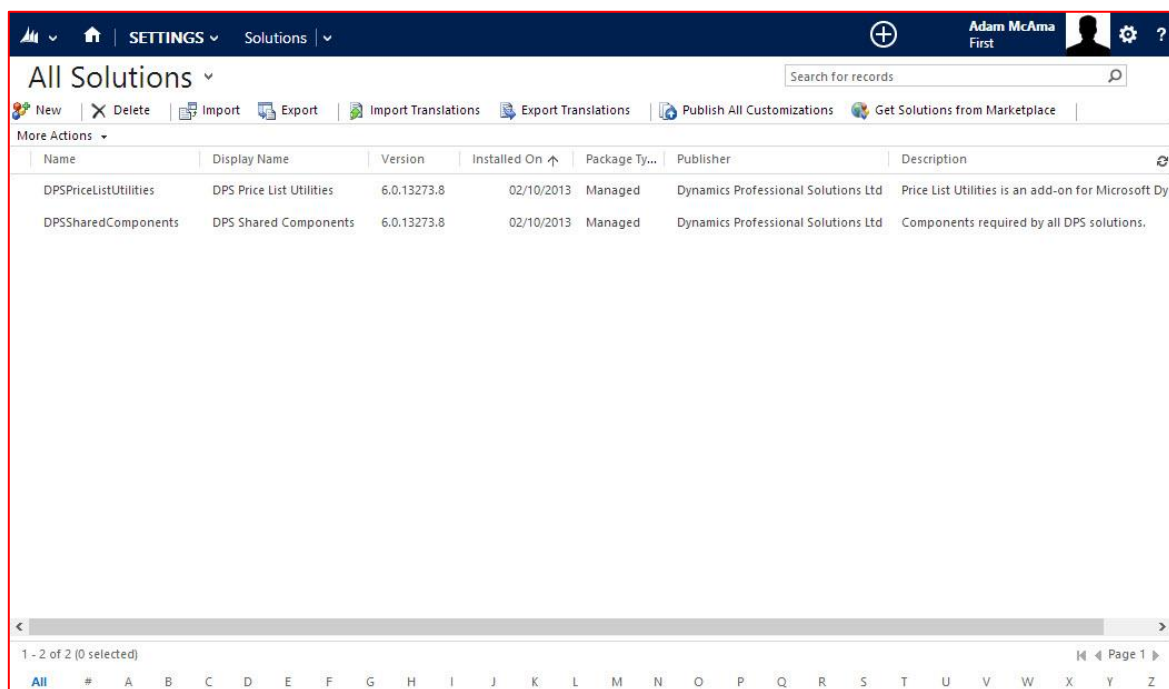
- c. Importing Solution screen will open and progress can be monitored. It may take some time to complete the import.



- d. When system finishes review that process was completed successfully. At this point you can also download a log file.



- e. Repeat above steps and import **PriceListUtilities\_6.0.xxxxx.x.zip** file.
- f. After that step you should have two managed solutions from Dynamics Professional Solutions Ltd publisher.



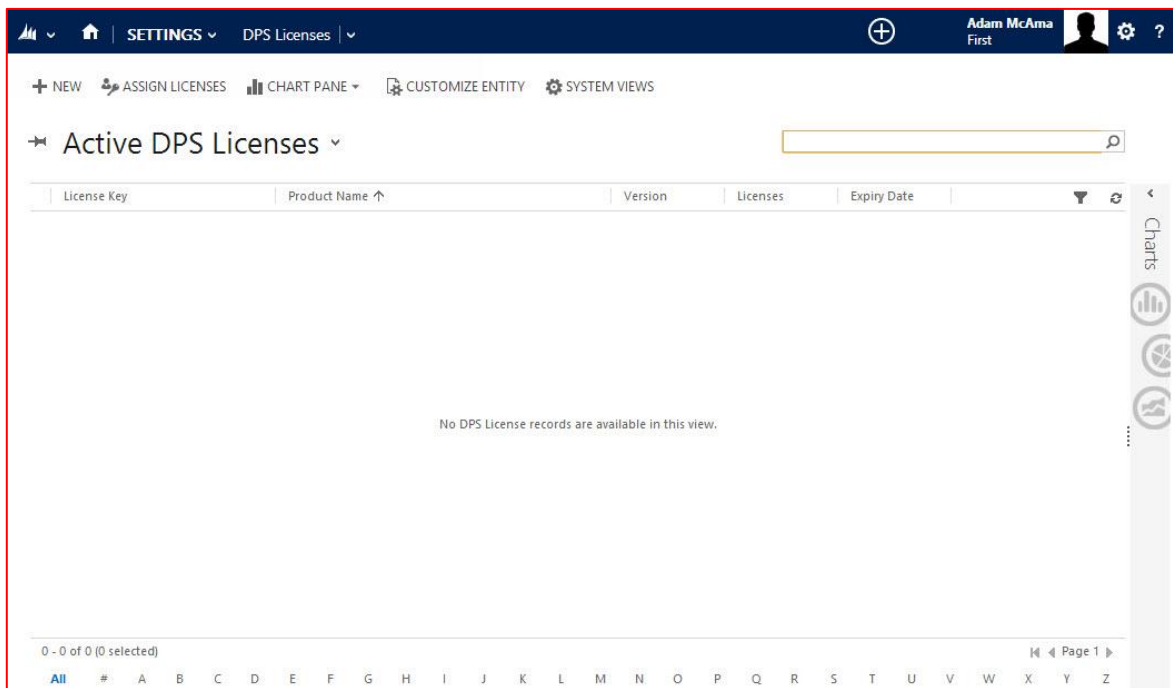
## Post Installation Configuration

DPS Price List Utilities download contains a fully functional version limited to updating 5 records. There are no evaluation licenses for this product.

If you have purchased Price List Utilities product follow below steps to register your product.

### 1. Login to Dynamics CRM and access Settings Area.

Select DPS Licenses option from the Extensions section.



### 2. Select New from Command Bar to add Dynamics Professional License.

In the Add License screen verify that your Organization Name is displayed correctly and enter the license key that was emailed to you.

**Add License**  
Enter your DPS license key below.

Organization Name:

License Key\*:

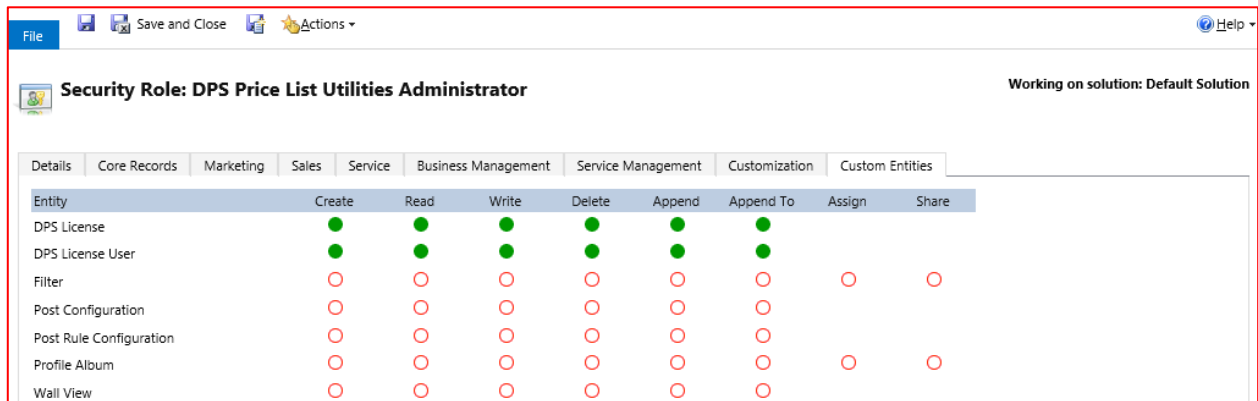
6.0.13273.8

## Permissions

After installing Price List Utilities solution two new security roles will be available in your Organization.

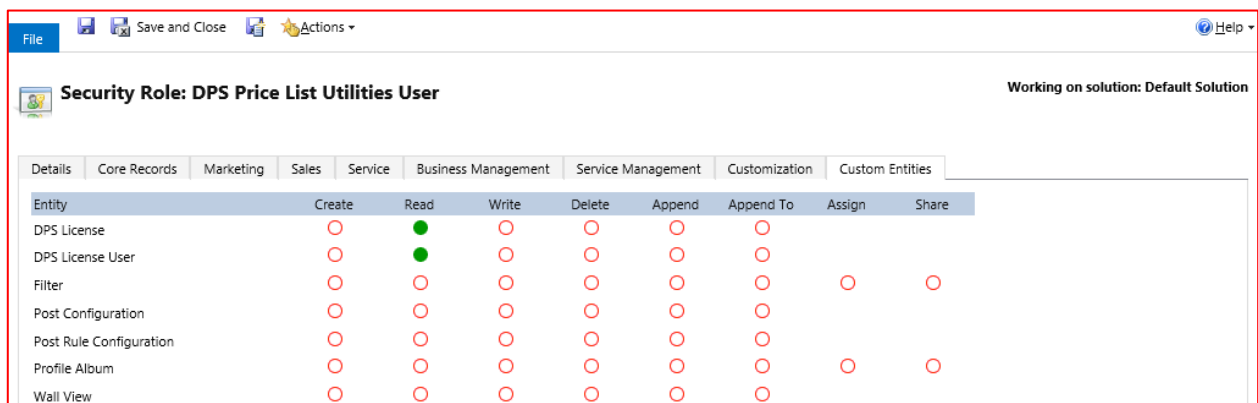
- DPS Price List Utilities Administrator
- DPS Price List Utilities User

Assign appropriate roles to your Dynamics CRM users or amend their existing security roles by adding privileges included in ours.



Working on solution: Default Solution

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
DPS License	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		
DPS License User	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		
Filter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Post Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Post Rule Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Profile Album	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wall View	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		



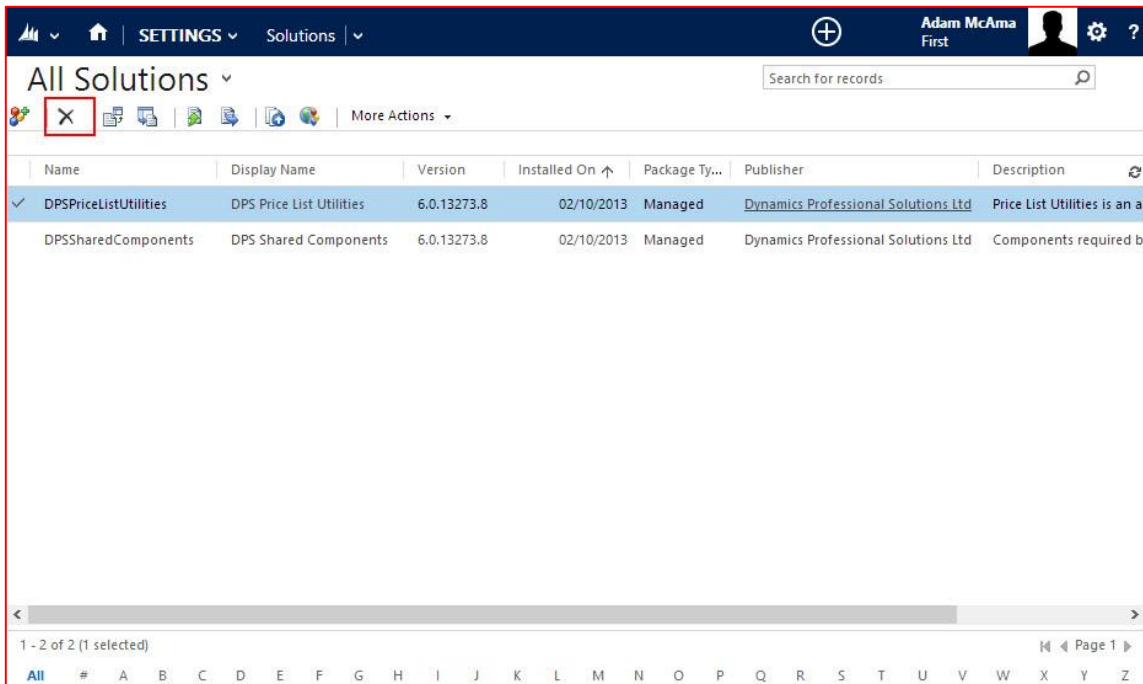
Working on solution: Default Solution

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
DPS License	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
DPS License User	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Filter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Post Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Post Rule Configuration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Profile Album	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wall View	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

# Uninstall

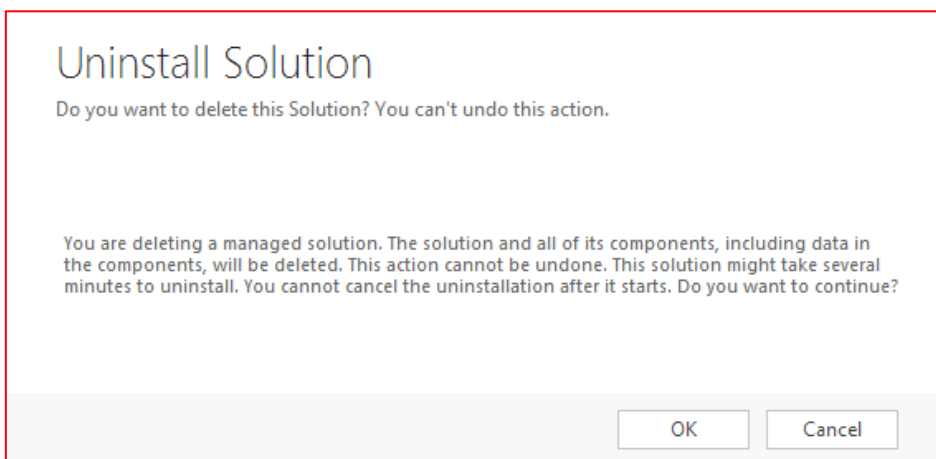
## 1. Login to Dynamics CRM and go to the Solutions in Settings Area.

Mark the solution you wish to uninstall and click delete button. Note that you will have to delete DPS Price List Utilities first. You will not be able to delete DPS Shared Components if there is at least one DPS product still installed.



## 2. Confirm Deletion

Confirm deletion screen will open. Click OK button to delete the solution.



## ***Support***

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If you have any questions or problem with our products contact our support team. Submit your question using New Support Request Form on our Web page. A member of our support team will get in touch with you as soon as possible.

**Support:** <http://www.dynamics-pros.com/support>

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