



Price List Utilities

For Dynamics 365 v 9.x



Installation Guide

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What's In This Manual

This manual provides guidelines for installing and configuring the Price List Utilities add-on for Dynamics 365 2016. 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 Dynamics 365.

➤ **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

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

Price List Utilities is an add-on application specially designed for Dynamics 365. With its intuitive wizard driven interface you will be able to:

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

And all of it requires just few simple steps, available directly from Dynamics 365 interface.

Written in HTML 5 it seamlessly integrates with the latest version of the Dynamics 365 2016. 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

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

Price List Utilities is compatible with Dynamics 365 version 9.

Installation Instruction

In this chapter you can find information about system requirements, how to install and uninstall Price List Utilities on your Dynamics 365 server. It also contains information about post installation configuration procedures.

System Requirements

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 10
Windows 8.1
Windows 8
Windows 7
Mac OSX

➤ **Supported browsers***

Microsoft Edge
Internet Explorer 11 (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).*

Installation

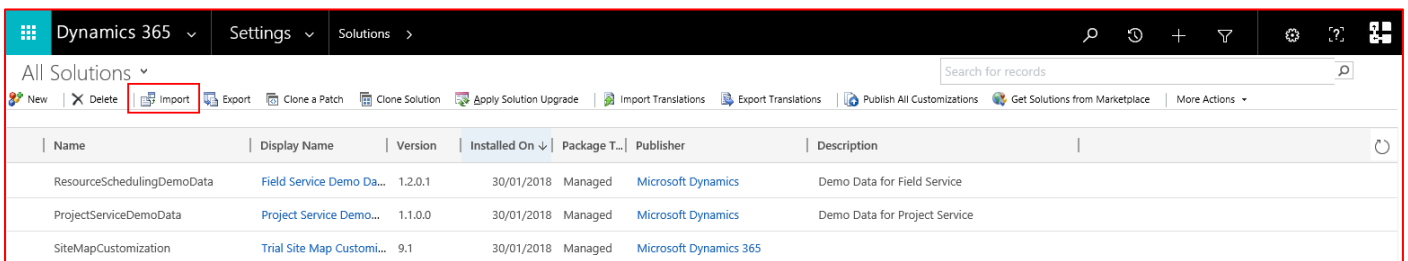
To use Price List Utilities no client or server-side installation is needed. Product is packaged as managed solution, so you only need to import one compressed (zip) file into your Dynamics 365 deployment. You must have administrator privileges in the Dynamics 365 to install this solution.

1. Obtain required files

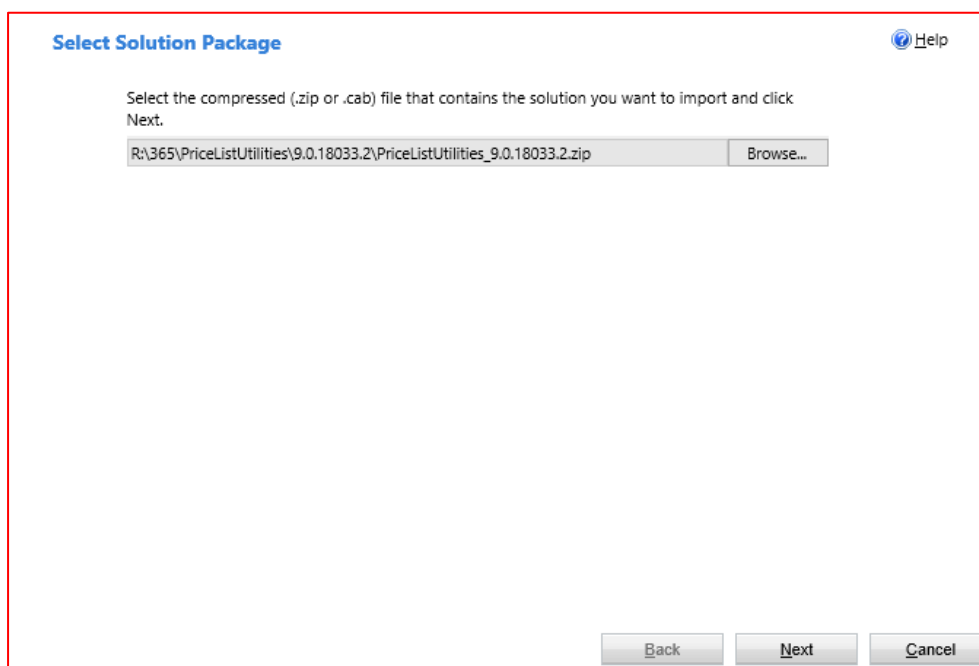
- a. Go to <http://downloads.dynamics-pros.com>
- b. Click on “Download trial versions of our products link” (login will be required) and download the latest version of the Price List Utilities 2016 (PriceListUtilities_2016.zip).
- c. Unzip PriceListUtilities_365_9.zip. It contains zip file you will be importing into Dynamics 365 and documentation.
 - i. PriceListUtilities_9.xxxxx.x.zip (import second)

2. Import managed solution

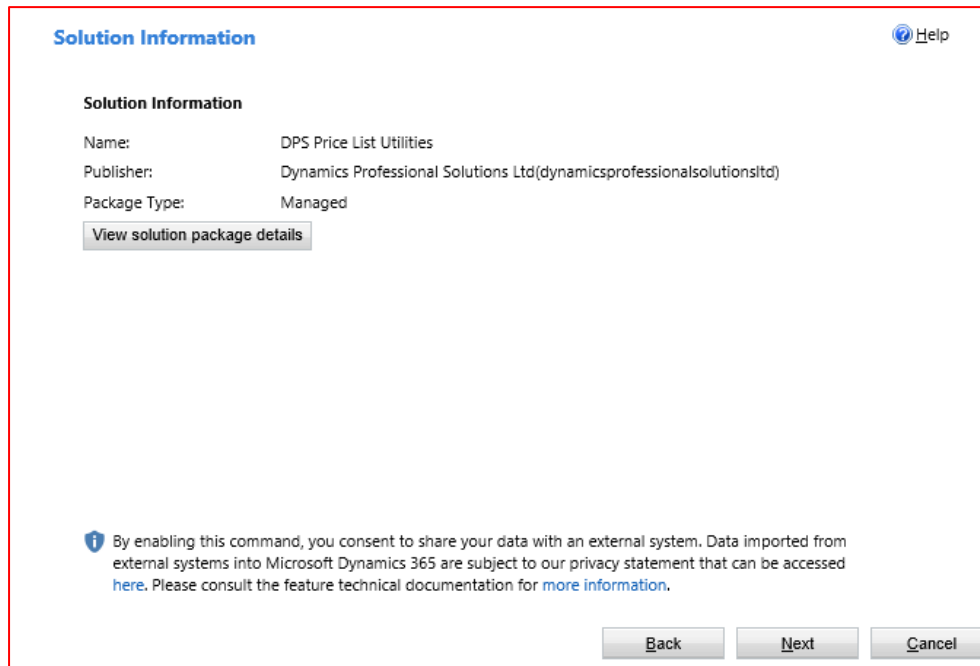
- a. Login to your Dynamics 365 and go to Solutions in the Settings Area. Click “Import” option in the toolbar.



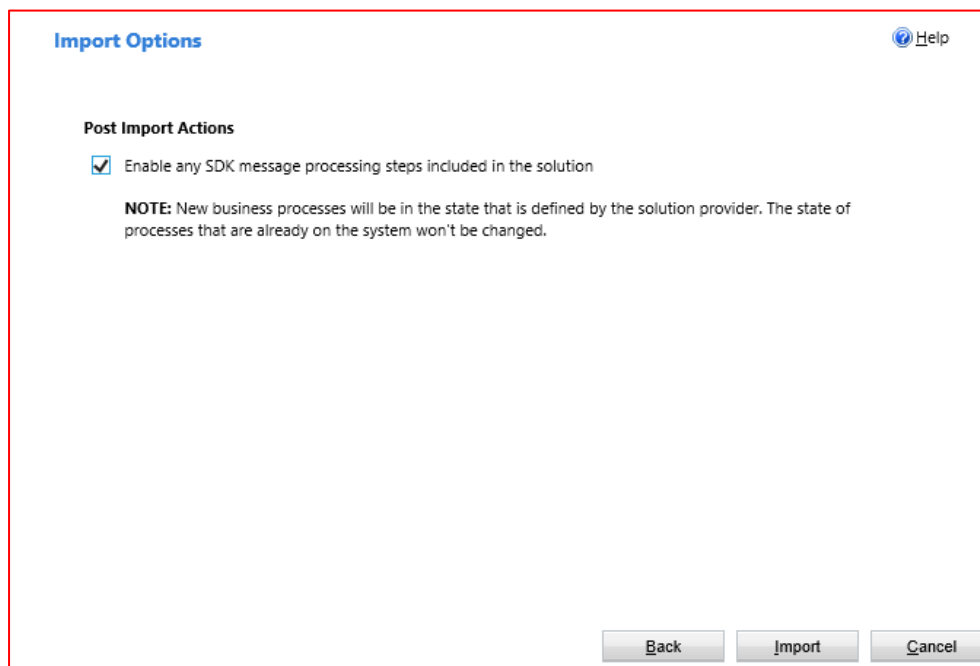
- b. In the Select Solution Package screen select the **PriceListUtilities_9.xxxxx.x.zip** file you have downloaded in the previous step. Click “Next”.



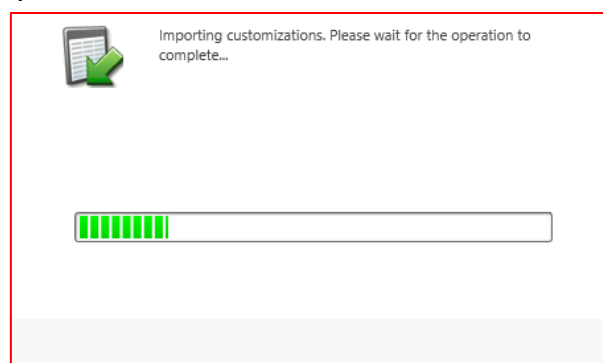
- c. Click “Next” in the “Solution Information” screen.



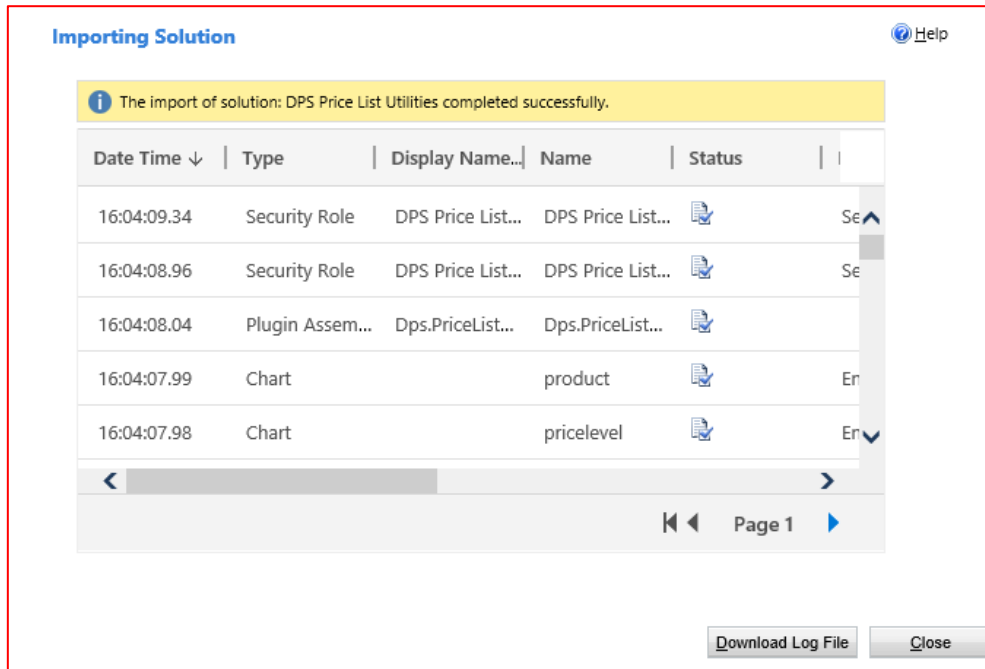
- d. In the “Import Options” screen make sure option “Enable any SDK message processing” is selected.



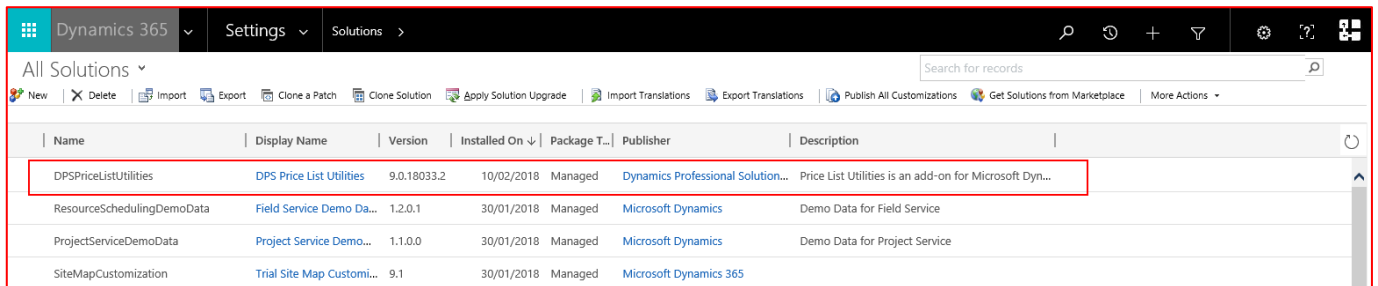
- e. Importing Solution screen will open, and progress can be monitored. It may take some time to complete the import.



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



- g. After that step you should have new managed solutions from Dynamics Professional Solutions Ltd publisher.



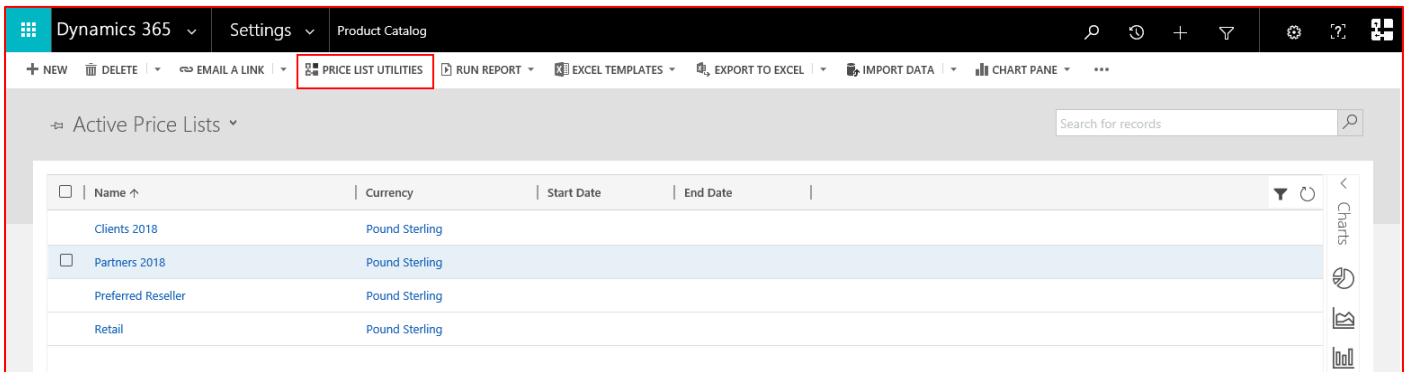
Post Installation Configuration

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.

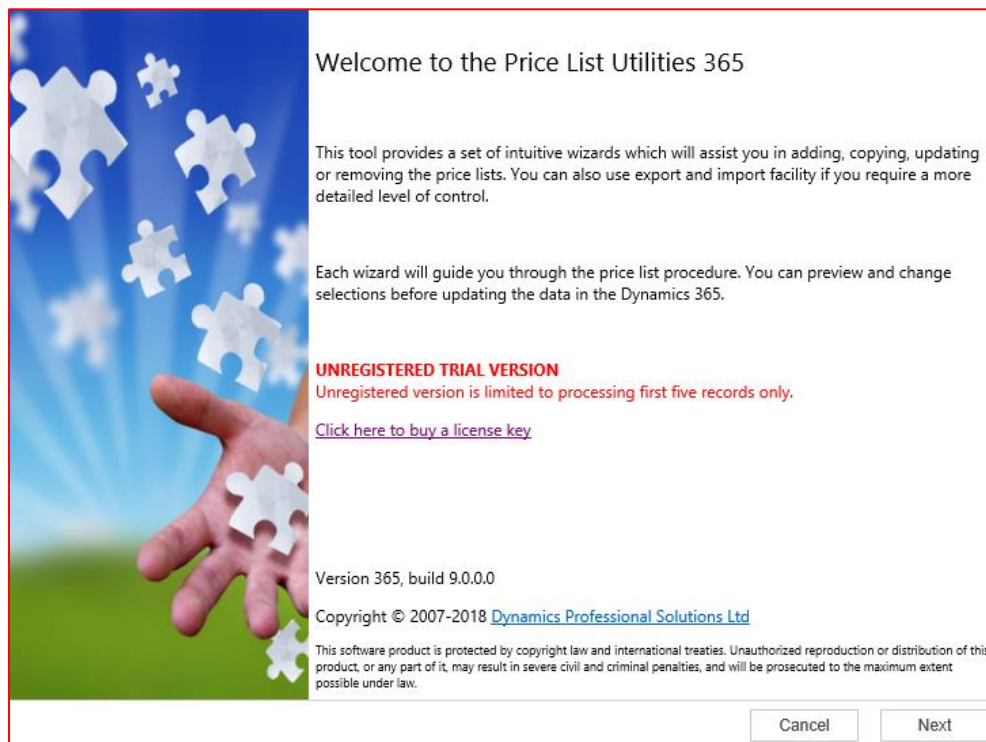
1. Login to Dynamics 365 and access Product Catalog in the Settings Area.

Click on the Price List Utilities button shown in the Ribbon.

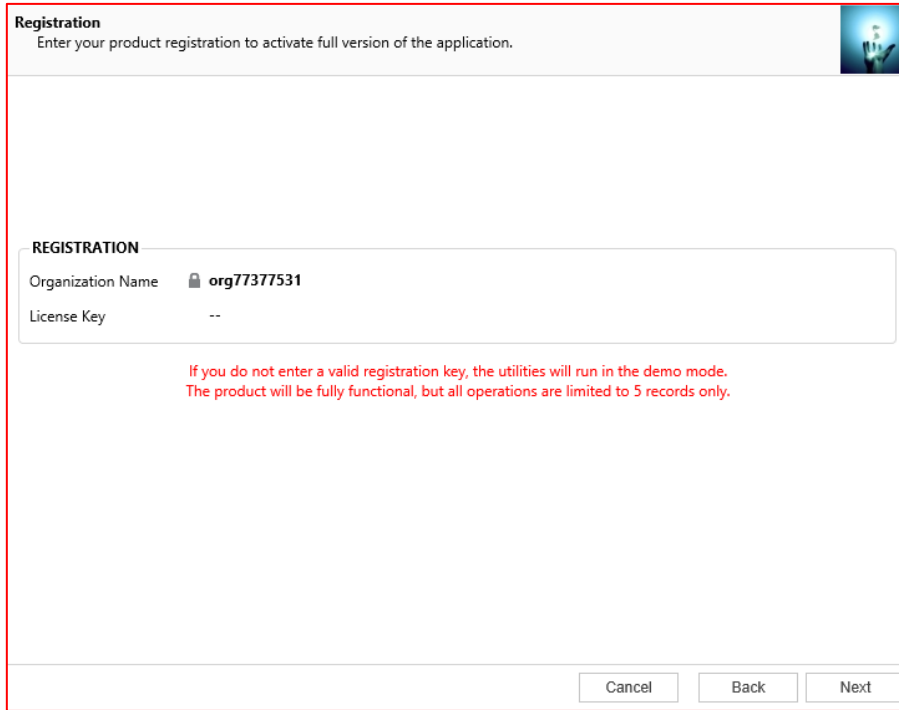


2. Welcome to the Price List Utilities 365.

On the Welcome to the Price List Utilities 2016 screen, click “Next” button



3. On the Registration screen verify that your Organization Name is displayed correctly and enter the license key that was emailed to you.

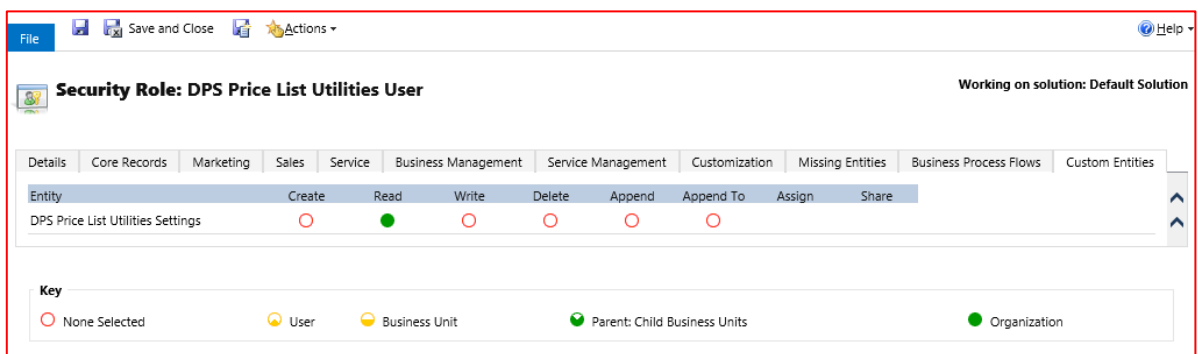
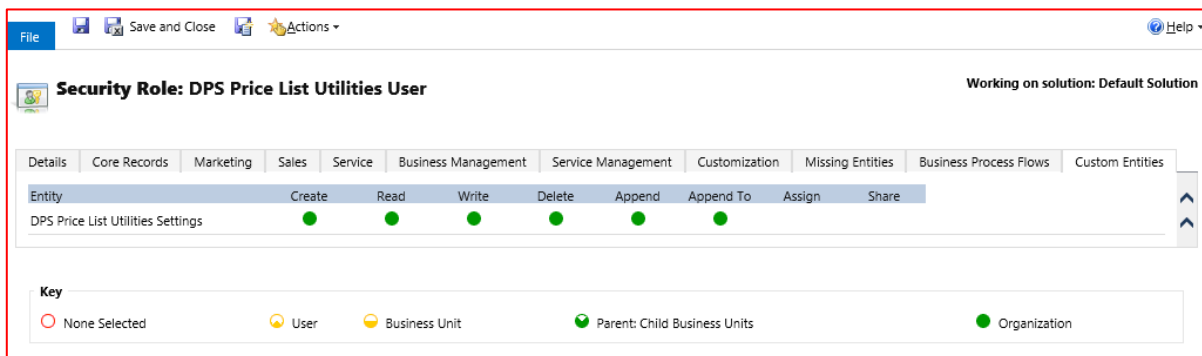


Permissions

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

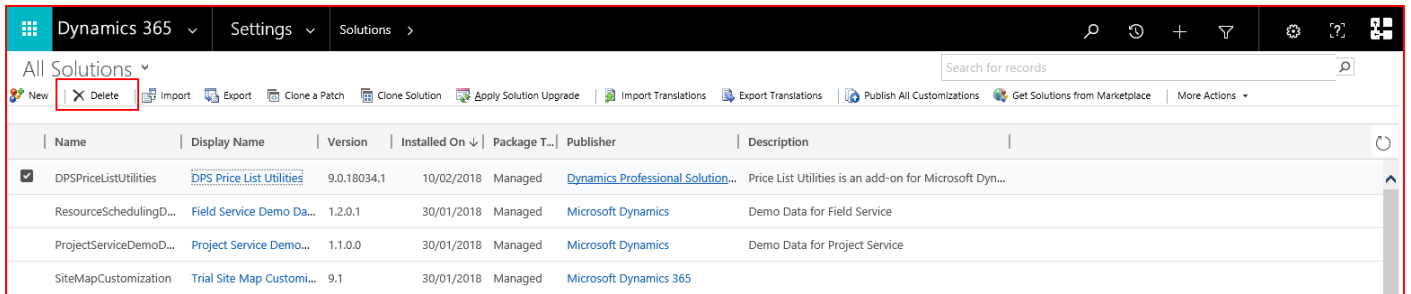
Assign appropriate roles to your Dynamics 365 users or amend their existing security roles by adding privileges included in ours.



Uninstall

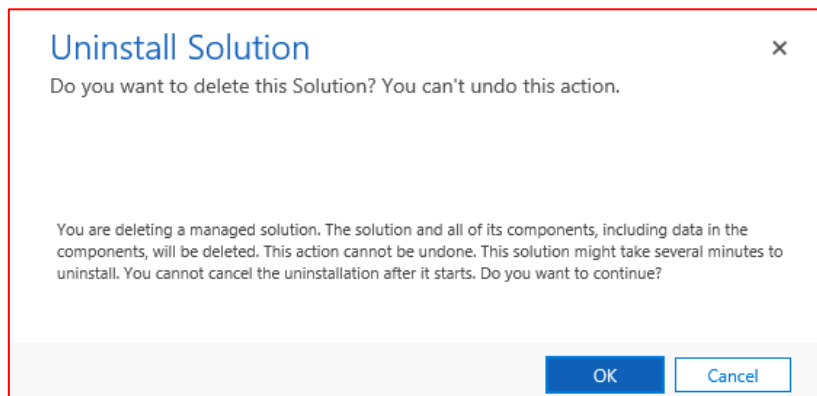
1. Login to Dynamics 365 and go to the Solutions in Settings Area.

Mark the solution you wish to uninstall and click delete button.



2. Confirm Deletion

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



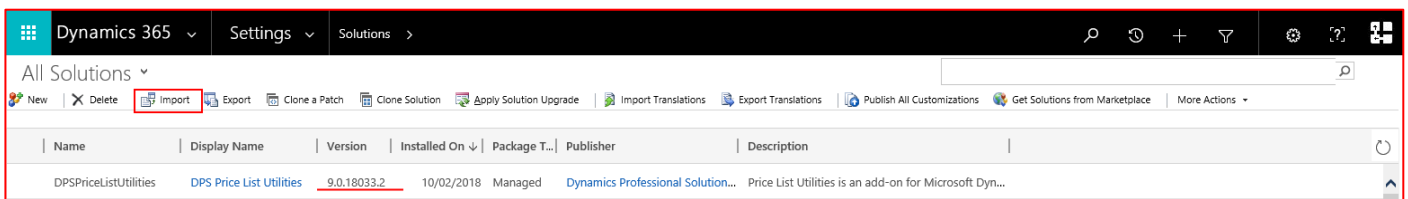
Update

All our products are sold with free updates for a main CRM version. This means that when you buy a product for the CRM 2016 you are entitled to receive free updates containing bug fixes and enhancements until new major version of the CRM is released.

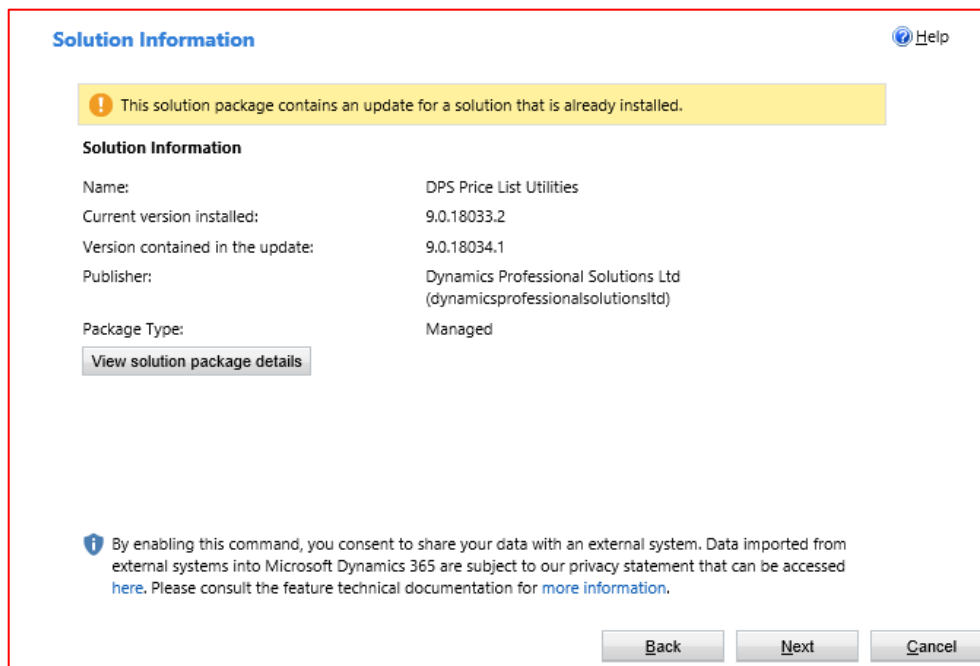
1. Download updated solution form DPS website

2. Import updated solution

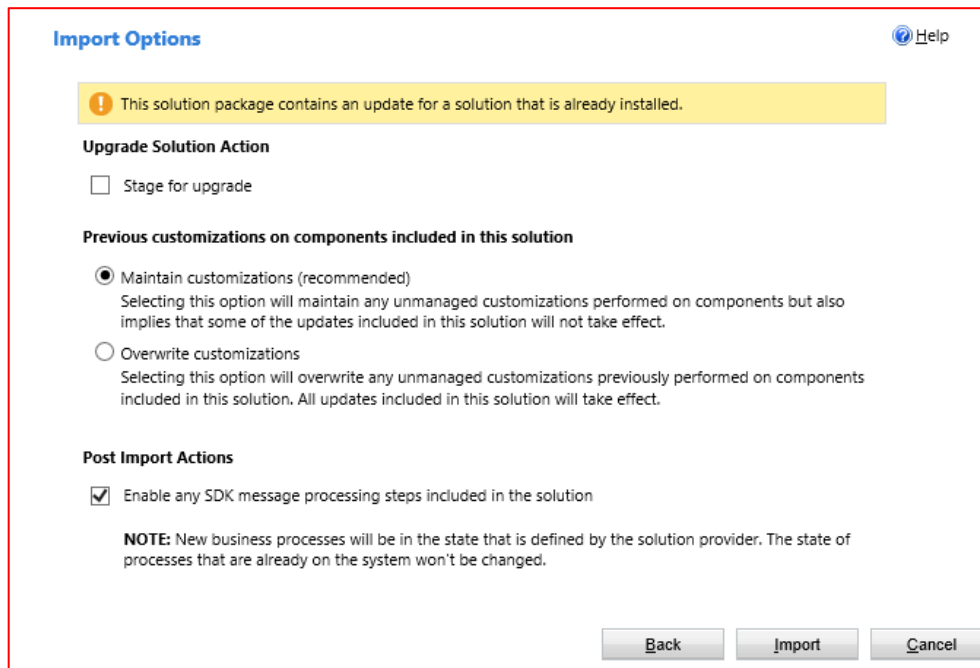
- a. Login to your Dynamics 365 and go to Solutions in the Settings Area. Click “Import” option in the toolbar.



- b. In the Select Solution Package screen select the PriceListUtilities_9.xxxxx.x.zip file you have downloaded from our website. Click “Next”.
- c. Dynamics 365 will spot that previous version of our solution already exist in your organization and ask for confirmation to process. Click “Next”.

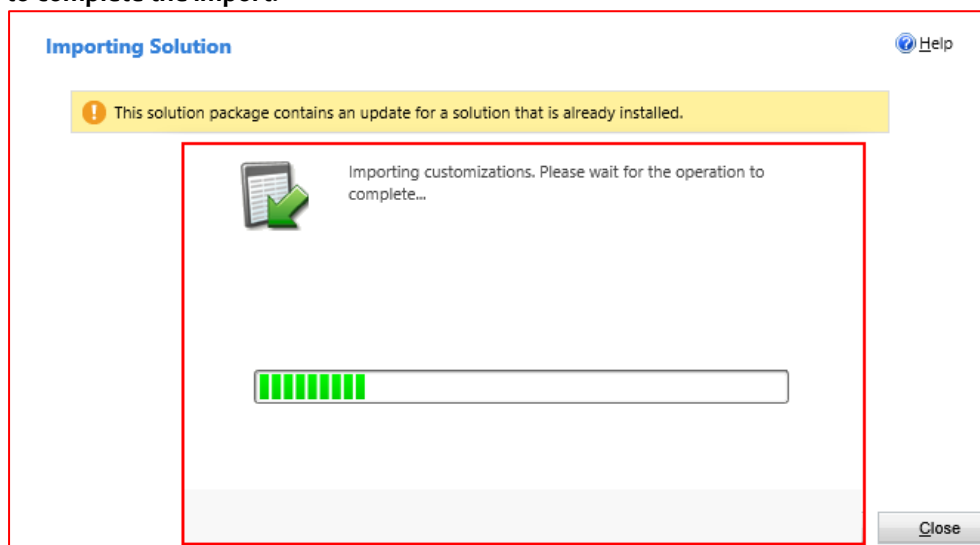


- d. When a new version of the solution is imported, users are given the option of keeping their own customizations or overwriting them.



- e. Importing Solution screen will open where progress can be monitored. It may take some time.

to complete the import.



Upgrade

Upgrade to new Dynamics 365 version cost 50% of the regular license price and it does not matter which version you are upgrading from. For example, you can upgrade from version 9 to 11 and the cost would be the same, e.g. 50% of the cost of the product version you are upgrading to.

After upgrading your Dynamics 365 instance import updated solution as discussed in Update section of this manual. You will have to provide new registration key for the upgraded product to work.

Alternatively uninstall old solution and import new one.

Support

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

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

Download: <http://www.dynamics-pros.com/downloads>

