

Price List Utilities

For Dynamics CRM 2013



Microsoft Dynamics CRM

SETTINGS

Product Catalog

Create

Adam McArma
First

NEW

DELETE

PRICE LIST UTILITIES

RUN REPORT

EXPORT TO EXCEL

Active Price Lists

Name	Currency	Start Date	End Date
2013 Customers	Pound Sterling	01/01/2013	31/12/2013
2013 Partners	Pound Sterling	01/01/2013	31/12/2013

Charts



Welcome to the Price List Utilities 2013

The Price List Utilities include a series of wizards that assist you in updating your price lists.

Choose a wizard to complete.

Select the price list procedure to complete.

☒ **Add Price List Wizard**
Add new price list items to your price list.

☐ **Update Price List Wizard**
Update existing records in your price lists.

☐ **Copy Price List Wizard**
Copy existing price list to your other products.

☐ **Remove Price List Wizard**
Remove existing records from your price lists.

☐ **Import Price List Wizard**
Import or update product price list from a flat file.

☐ **Export Price List Wizard**
Export product price list to a flat file.

Cancel

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Price List Utilities

- Price List Utilities is an add-on application specially designed for Microsoft Dynamics CRM.
- 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.



Price List Utilities

- **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
 - copy price lists from one price list to multiple pricelists
 - remove unwanted price list items
 - import or update price lists from a flat file
 - export price list to a file which can be used later as a source for import.




ADD PRICE LIST WIZARD



Choose a wizard to complete.

- Select the price list procedure you wish to complete.
- Appropriate wizard will guide you through the procedure.

Choose a wizard to complete.

Select the price list procedure to complete.

- ☒ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price lists.
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Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**
Export product price list to a flat file.

CancelBackNext



Select a price list and restrictions.

- Select a price list you wish to update by adding new price list items. Specify product range.

Select a price list and restrictions.

Price list items can only be added to products which share the same unit group.


Price List*	 2013 Customers 
Unit Group*	 ORG 
First Product ID	 ACSUM04 
Last Product ID	 COPY06 



Specify pricing details.

- Specify information for new price list item

Specify pricing details.
Specify unit of measure, quantity selling options and pricing method.



Unit*

ORG

Discount List

Quantity Selling Option*

Whole

Pricing Method*

Currency Amount

Amount*

250.00

Currency

Pound Sterling

Cancel

Back

Next



Specify rounding details.

- Specify rounding details.
- This screen is not available if you have specified Currency Amount as a Pricing Method.

Specify rounding details.
Specify rounding policy and options.

Rounding Policy

Up

Rounding Option

Ends In

Rounding Amount

0.05

Cancel

Back

Next




Preview the records to be added.

- Preview the records to be processed.

Preview the records to be added.

Preview the records to be processed and verify your selections.



☒ Select All ☐ Select None

	Product	Price List	Unit
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 3)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 4)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 4)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Copy Tool (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Copy Tool (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Copy Tool (CRM 4)	2013 Customers	ORG

Cancel


Back

Next



Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

Review settings.


Verify the settings and click Next if you are ready to start processing.

Property	Value
Action	Add Price List
Price List	2013 Customers
Unit Group	ORG
Price List Items	ACSUM04 : AMUP06
Selected Price List Items	7
Unit	ORG
Discount List	Not specified
Quantity Selling Option	Whole
Pricing Method	Currency Amount
Amount	250.00000



Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

Processing.

Wizard is currently processing your data. It may take several minutes to complete.

Processing

Product Name:	PRLU03
Price List:	2013 Customers
Unit:	ORG

Processed:	3
Skipped:	0
Errors:	0

Cancel

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Next



Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






UPDATE PRICE LIST WIZARD



Choose a wizard to complete.

- Let's see how you can update existing records in your price list.

Choose a wizard to complete.

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☒ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**
Export product price list to a flat file.



Enter restrictions.

- You can update price list for a group of products that share the same pricing method.
- You can update multiple price list items at the same time.

Enter restrictions.
You can update price lists for a group of products that share a common price method.

Price List

From  2013 Customers 

To  2013 Customers 

Product

From 

To 

Pricing Method*  Currency Amount 

Cancel

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Next



Specify update details.

- Indicate how the price list information should be updated.

Specify update details.
Indicate how the price list information should be updated.

Update By:

☒ Percentage
☐ Fixed

Example:

Current Price = \$120
Update by Percentage
Amount = 10%
New Price = $\$120 + (10\% * \$120) = \$132$

Amount (%)*

Cancel

Back

Next




Preview the records to be updated.

- Preview the records to be processed.

Preview the records to be added.

Preview the records to be processed and verify your selections.



☒ Select All ☐ Select None

	Product	Price List	Unit
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 3)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 4)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 4)	2013 Customers	ORG

Cancel


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Next



Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

Review settings.


Verify the settings and click Next if you are ready to start processing.

Property	Value
Action	Update Price List
Price List Items	Range not specified
Selected Price List Items	9
Price Lists	2013 Customers : 2013 Customers
Update Mode	Percentage
Update Amount	20.00000



Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

Processing.

Wizard is currently processing your data. It may take several minutes to complete.

Processing

Product Name:	PRLU03
Price List:	2013 Customers
Unit:	ORG

Processed:	3
Skipped:	0
Errors:	0

Cancel

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Next



Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






COPY PRICE LIST WIZARD



Choose a wizard to complete.

- Let's see how you can copy existing price list from a source product to a range of similar products.

Choose a wizard to complete.

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☒ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**
Export product price list to a flat file.



Select a source product and restrictions.

- Select how you want to copy information.
- You can copy price list items:
 - from one Price List to another
 - from one Product to other

Select a source product and restrictions.

Select a source product with the price list that you want to copy to other products.

Copy From (source)

☒ Product Price Lists ☐ Price List

Product*

Copy To (destination)

First Product ID

Last Product ID

Cancel Back Next



Select a source product and restrictions.

- Select a source Price List.
- Specify products you want to copy price information to.

Specify export range.
Select products and/or price lists to export.

Export

☐ by Price List ☒ by Product

Product*

First Price List:

Last Price List:

Cancel Back Next



Preview the records to be copied.

- Preview the records to be processed.

Preview the records to be copied.

Preview the records to be processed and verify your selections.

☒ Select All

☐ Select None

	Product	Price List	Unit
<input checked="" type="checkbox"/>	DPS Import Tool (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Import Tool (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Import Tool (CRM 4)	2013 Customers	ORG

Cancel


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Next



Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

Review settings.


Verify the settings and click Next if you are ready to start processing.

Property	Value
Action	Export Price Lists
Price List	2013 Customers
Products	Range not specified
File name	PRLU -DPS 2013 Export.txt
Field Separator	Comma (,)



Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

Processing.

Wizard is currently processing your data. It may take several minutes to complete.

Processing

Product Name:	PRLU03
Price List:	2013 Customers
Unit:	ORG

Processed:	3
Skipped:	0
Errors:	0

Cancel

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Next



Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






REMOVE PRICE LIST WIZARD



Choose a wizard to complete.

- Let's see how you can remove existing price list records.

Choose a wizard to complete.

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☒ **Remove Price List Wizard**
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**
Export product price list to a flat file.




Enter restrictions.

- Enter restrictions to limit price list items that will be removed.
- Use Price List or Products as ranges.

Enter restrictions.
You can update price lists for a group of products that share a common price method.

Price List


From  2013 Customers 

To  2013 Customers 

Product

From 

To 

Pricing Method*  Currency Amount

Cancel

Back

Next



Preview the records to be removed.

- Preview the records to be processed.

Preview the records to be removed.

Preview the records to be processed and verify your selections.

☒ Select All

☐ Select None

	Product	Price List	Unit
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 3)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 4)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2011)	2013 Customers	ORG

Cancel


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Next



Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

Review settings.


Verify the settings and click Next if you are ready to start processing.

Property	Value
Action	Remove Price List
Price List Items	ACSUM04 : AMUP04
Selected Price List Items	3
Price Lists	2013 Customers : 2013 Customers



Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

Processing.

Wizard is currently processing your data. It may take several minutes to complete.

Processing

Product Name:	PRLU03
Price List:	2013 Customers
Unit:	ORG

Processed:	3
Skipped:	0
Errors:	0

Cancel

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Next



Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






IMPORT PRICE LIST WIZARD



Choose a wizard to complete.

- Let's see how to import or update existing price list items

Choose a wizard to complete.

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price lists.
- ☒ **Import Price List Wizard**
Import or update product price list from a flat file.
- ☐ **Export Price List Wizard**
Export product price list to a flat file.



Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

Review settings.
Verify the settings and click Next if you are ready to start processing.

Property	Value
Action	Remove Price List
Price List Items	ACSUM04 : AMUP04
Selected Price List Items	3
Price Lists	2013 Customers : 2013 Customers

Cancel

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Next



Select an input file.

- Select a file that contains price list items to import or update.

Select an input file.
Select a file that contains price lists to import from and specify its format.

Source File: PRLU -DPS 2013 Import.txt Browse...

Field Separator: Comma (,) ▼

Field Data Delimiter: Double Quote (") ▼

☒ First row contains column headings

Cancel Back Next



Map fields.

- Map source import file fields to CRM Entity fields.

Map fields.

Map source import file fields to CRM Entity fields.

Import	Target	Source		
<input checked="" type="checkbox"/>	Amount	Amount	▼	300.0000
<input type="checkbox"/>	Currency		▼	
<input checked="" type="checkbox"/>	Discount List	Discount List	▼	
<input checked="" type="checkbox"/>	Percentage	Percentage	▼	
<input checked="" type="checkbox"/>	Price List	Price List	▼	2013 Customers
<input checked="" type="checkbox"/>	Pricing Method	Pricing Method	▼	Currency Amount
<input type="checkbox"/>	Process		▼	
<input type="checkbox"/>	Process Stage		▼	
<input checked="" type="checkbox"/>	Product	Product	▼	AMUP05
<input checked="" type="checkbox"/>	Quantity Selling Option	Quantity Selling Option	▼	Whole
<input checked="" type="checkbox"/>	Rounding Amount	Rounding Amount	▼	
<input checked="" type="checkbox"/>	Rounding Option	Rounding Option	▼	
<input checked="" type="checkbox"/>	Rounding Policy	Rounding Policy	▼	

Cancel

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Input file validation.

- Validate the input file.

Input file validation.

Input file needs to be validated. Click 'Verify' to start validation process.

Verify

Amount	Discount List	Percentage	Price List	Pricing Method	Product	Quantity Selling
↻ 300.0000			2013 Cust	Currency Amount	AMUP05	Whole
Existing record will be updated.						
↻ 300.0000			2013 Cust	Currency Amount	AMUP06	Whole
Existing record will be updated.						
↻ 250.0000			2013 Cust	Currency Amount	PRLU03	Whole
Existing record will be updated.						
↻ 250.0000			2013 Cust	Currency Amount	PRLU05	Whole
Existing record will be updated.						
↻ 250.0000			2013 Cust	Currency Amount	PRLU06	Whole
Existing record will be updated.						

Cancel


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Next



Review settings.

- Verify settings you have selected.
- Use “Back” button if you wish to make any changes

Review settings.


Verify the settings and click Next if you are ready to start processing.

Property	Value
Action	Import Price Lists
Price List Items to Import	5



Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

Processing.

Wizard is currently processing your data. It may take several minutes to complete.

Processing

Product Name:	PRLU03
Price List:	2013 Customers
Unit:	ORG

Processed:	3
Skipped:	0
Errors:	0

Cancel

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Next



Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.






EXPORT PRICE LIST WIZARD



Choose a wizard to complete.

- Let's see how to export existing price list items

Choose a wizard to complete.

Select the price list procedure to complete.

- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price lists.
- ☐ **Import Price List Wizard**
Import or update product price list from a flat file.
- ☒ **Export Price List Wizard**
Export product price list to a flat file.



Specify export range.

- Select how you want to identify records to export (by Price List or by Product)

Specify export range.
Select products and/or price lists to export.

Export

☐ by Price List ☒ by Product

Product*

First Price List:

Last Price List:

Cancel Back Next



Specify export file.

- Select location and format for the export file

Specify export file.
Select export file and file format.

Export File: PRLU -DPS 2013 Export.txt [Browse...](#)


Field Separator: Comma (,) ▼

[Cancel](#) [Back](#) [Next](#)



Review settings.

- Verify the settings you have selected.
- Use “Back” button if you wish to make any changes.

Review settings.


Verify the settings and click Next if you are ready to start processing.

Property	Value
Action	Export Price Lists
Price List	2013 Customers
Products	Range not specified
File name	PRLU -DPS 2013 Export.txt
Field Separator	Comma (,)



Processing.

- Wizard will start processing.
- Use “Show Report” to see details in case there were any errors.

Processing.

Wizard is currently processing your data. It may take several minutes to complete.

Processing

Product Name:	PRLU03
Price List:	2013 Customers
Unit:	ORG

Processed:	3
Skipped:	0
Errors:	0



Completed the Price List Utilities Wizard.

- If you want to run another wizard you can run Price List Utilities again.





Price List Utilities

- **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
 - copy price lists from one price list to multiple pricelists
 - remove unwanted price list items
 - import or update price lists from a flat file
 - export price list to a file which can be used later as a source for import



D Y N A M I C S

P R O F E S S I O N A L S O L U T I O N S

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The image features three stylized human figures. The central figure is red, and the two flanking figures are blue. They are positioned on a base composed of overlapping, wavy shapes in shades of red and yellow. The background is white.

Thank You!

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