



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.

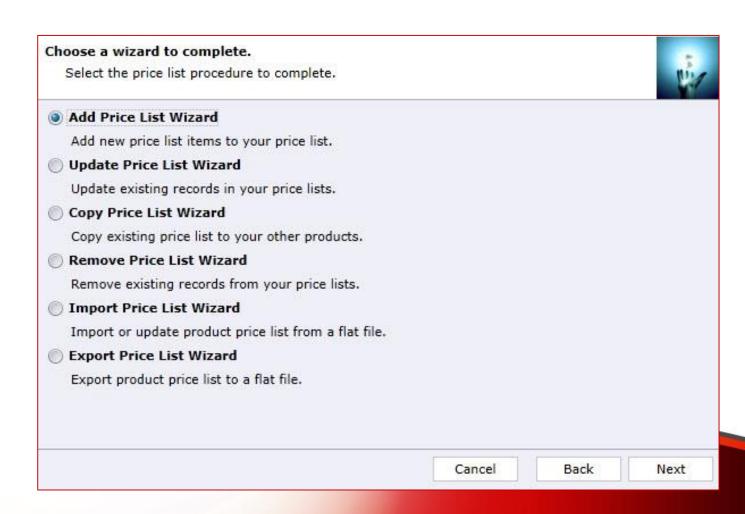


ADD PRICE LIST WIZARD



Choose a wizard to complete.

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





Select a price list and restrictions.

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





Specify pricing details.

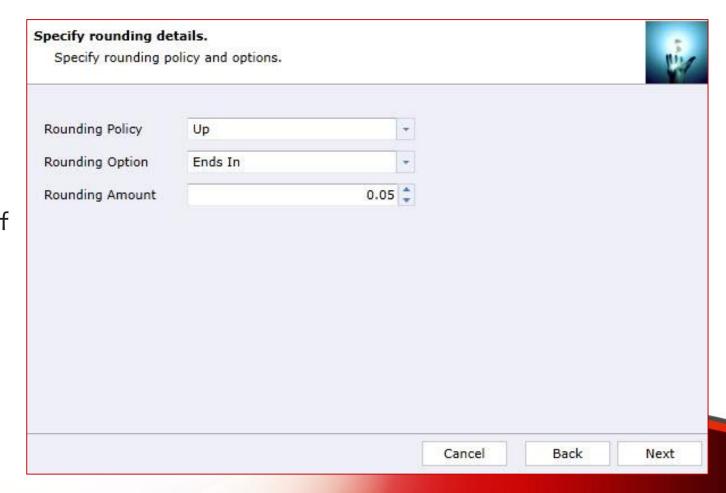
 Specify information for new price list item





Specify rounding details.

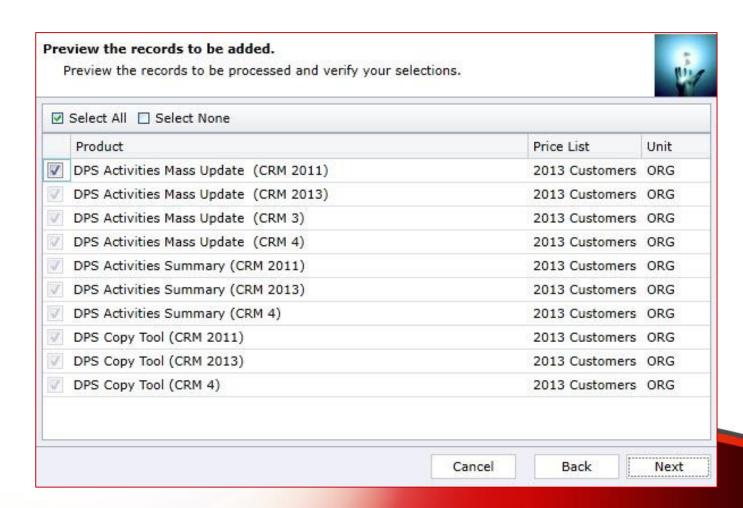
- Specify rounding details.
- This screen is not available if you have specified Currency Amount as a Pricing Method.





Preview the records to be added.

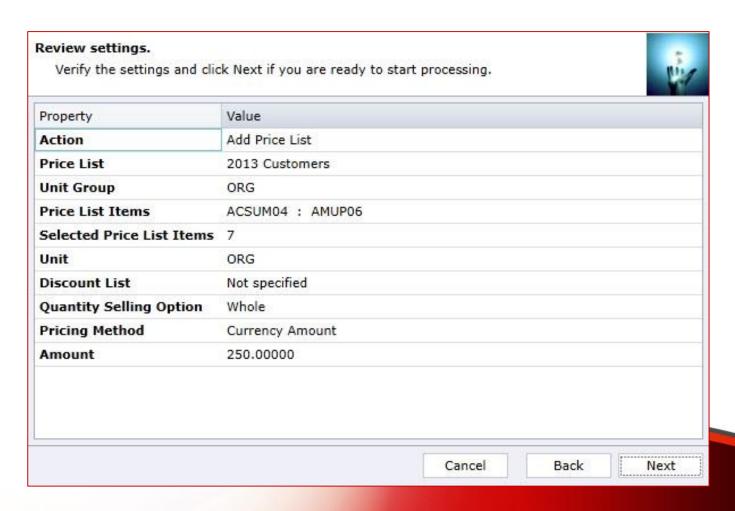
Preview the records to be processed.





Review settings.

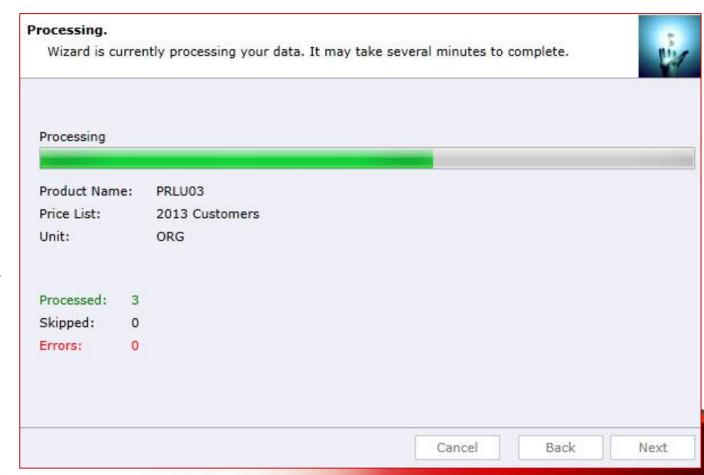
- Verify the settings you have selected.
- Use "Back" button if you wish to make any changes.





Processing.

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





Completed the Price List Utilities Wizard.

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



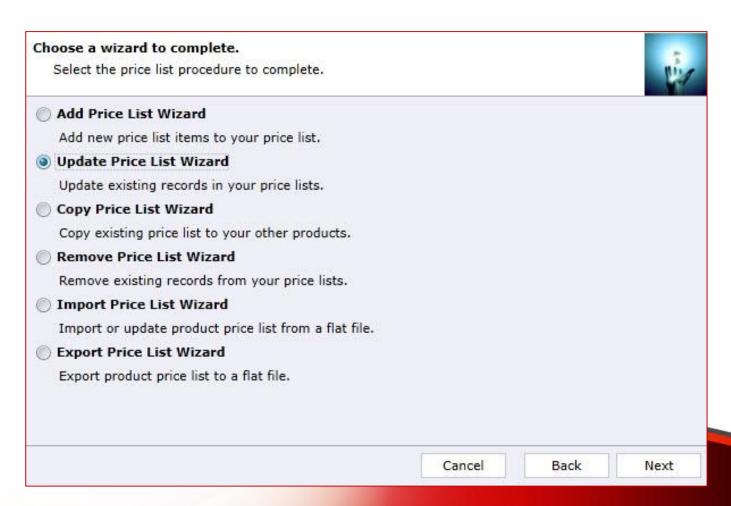


UPDATE PRICE LIST WIZARD



Choose a wizard to complete.

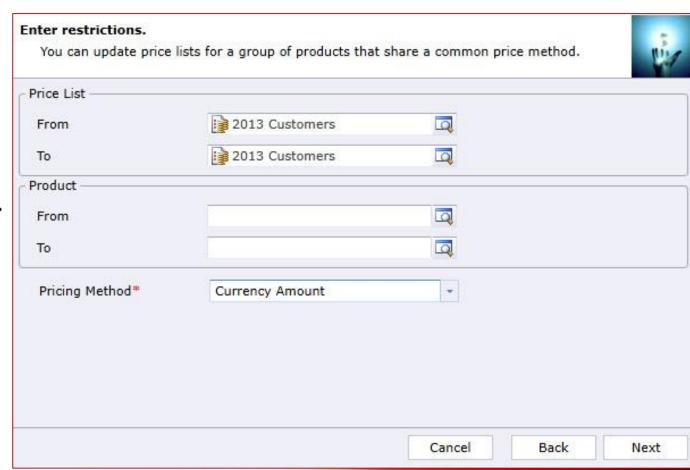
 Let's see how you can update existing records in your price list.





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.





Specify update details.

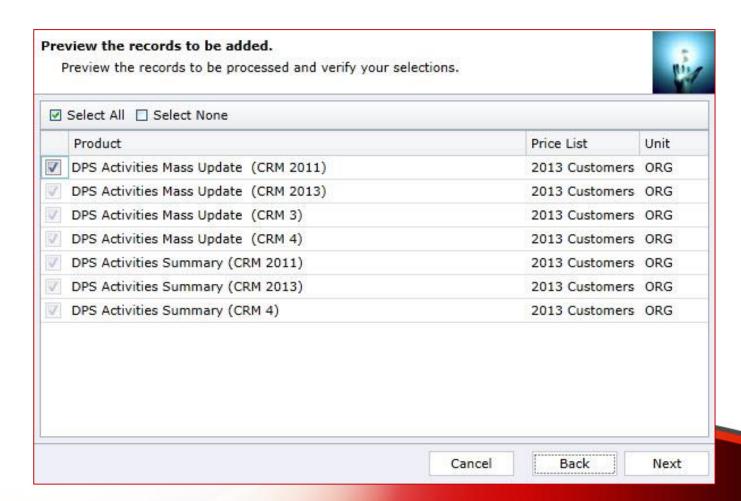
 Indicate how the price list information should be updated.





Preview the records to be updated.

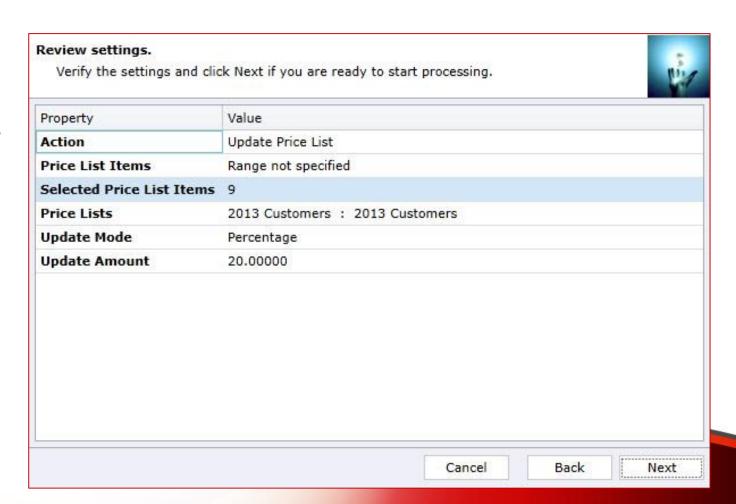
 Preview the records to be processed.





Review settings.

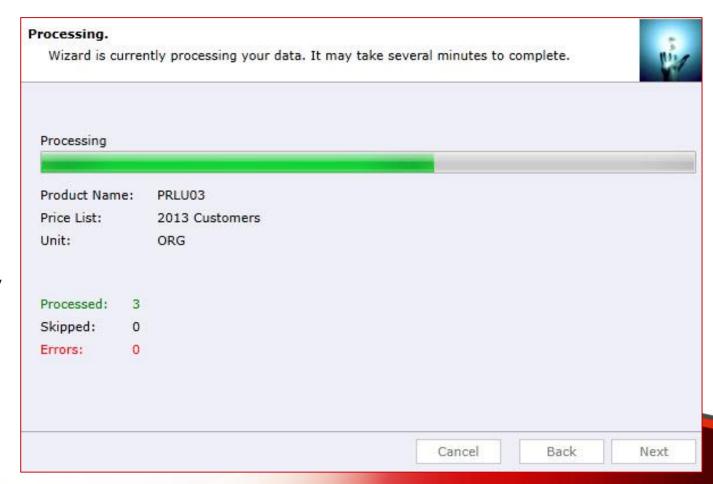
- Verify the settings you have selected.
- Use "Back" button if you wish to make any changes.





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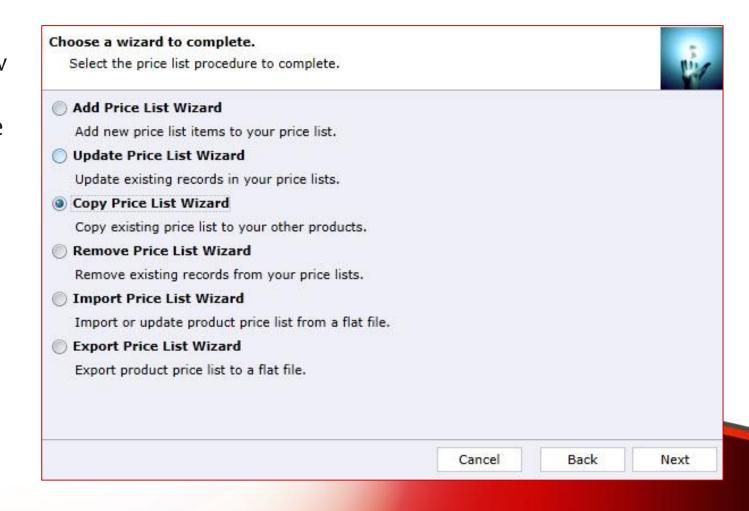


COPY PRICE LIST WIZARD



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.





Select a source product and restrictions.

 Select how you want to copy information.

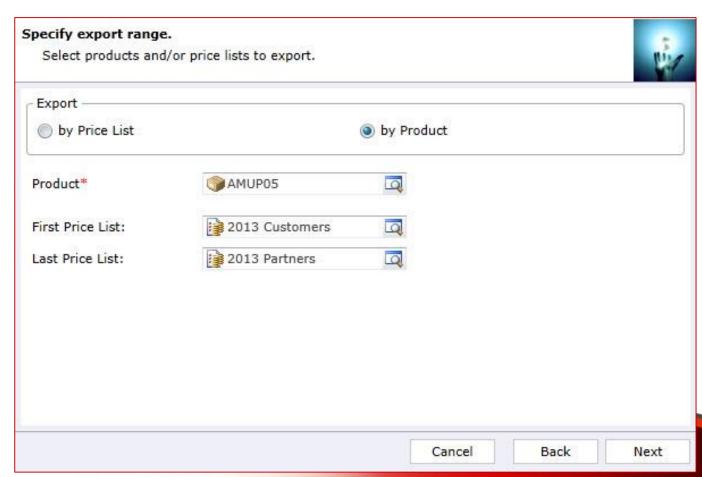
- You can copy price list items:
- from one Price List to another
- from oneProduct to other





Select a source product and restrictions.

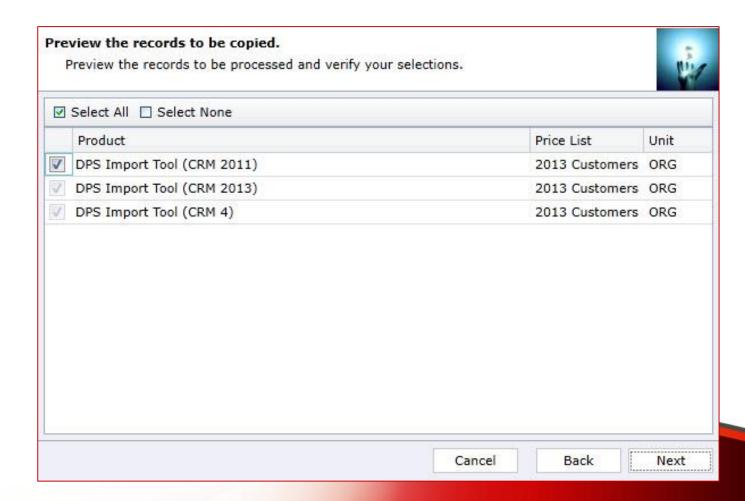
- Select a source
 Price List.
- Specify
 products you
 want to copy
 price
 information to.





Preview the records to be copied.

 Preview the records to be processed.

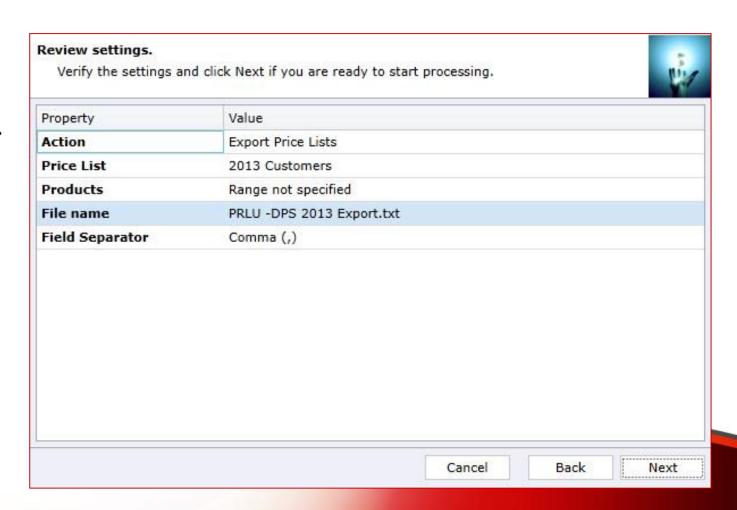




Review settings.

Verify the settings you have selected.

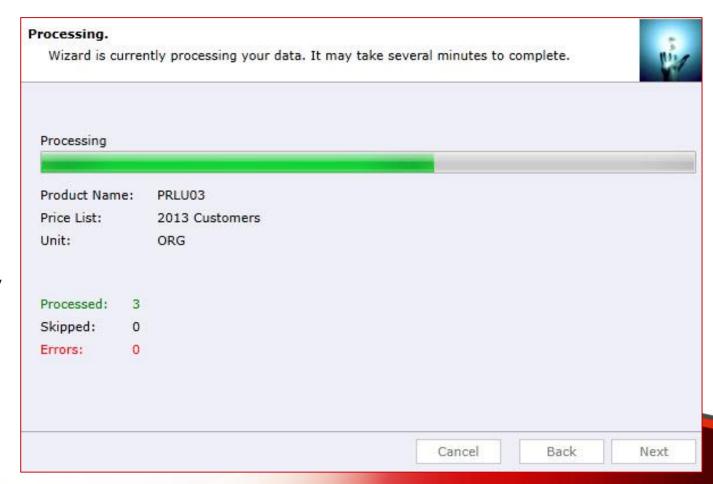
 Use "Back" button if you wish to make any changes.





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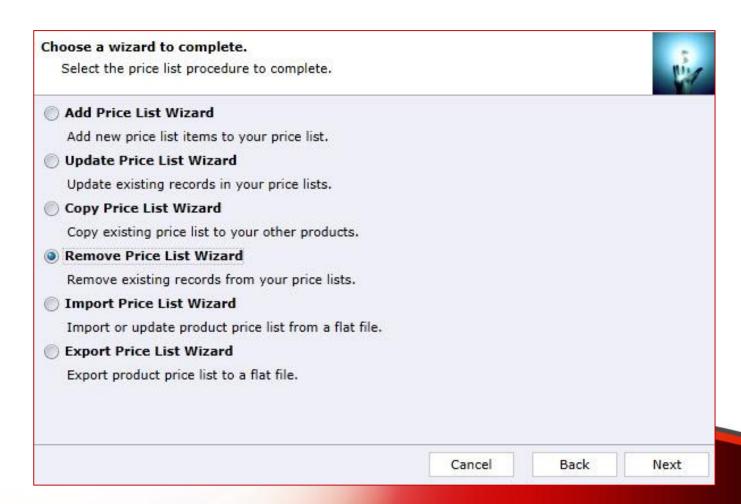


REMOVE PRICE LIST WIZARD



Choose a wizard to complete.

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





Enter restrictions.

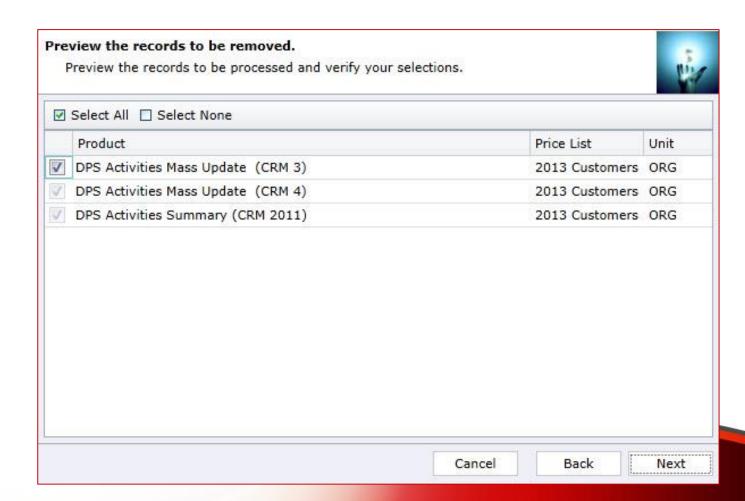
- Enter
 restrictions to
 limit price list
 items that well
 be removed.
- Use Price List or Products as ranges.





Preview the records to be removed.

 Preview the records to be processed.

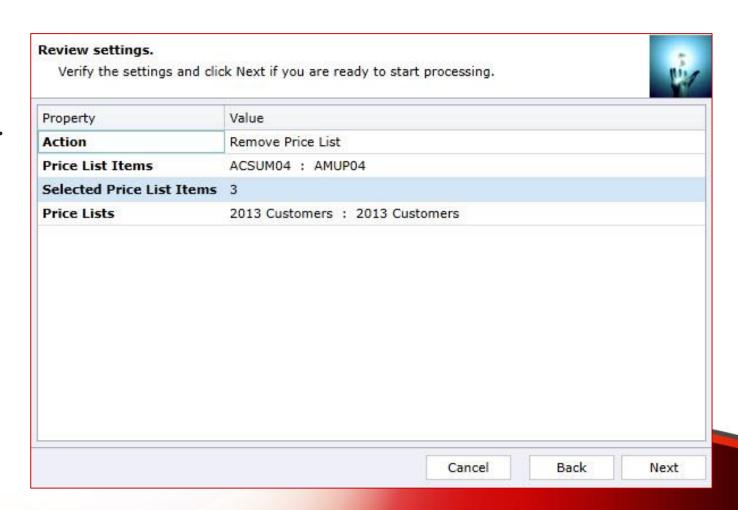




Review settings.

 Verify the settings you have selected.

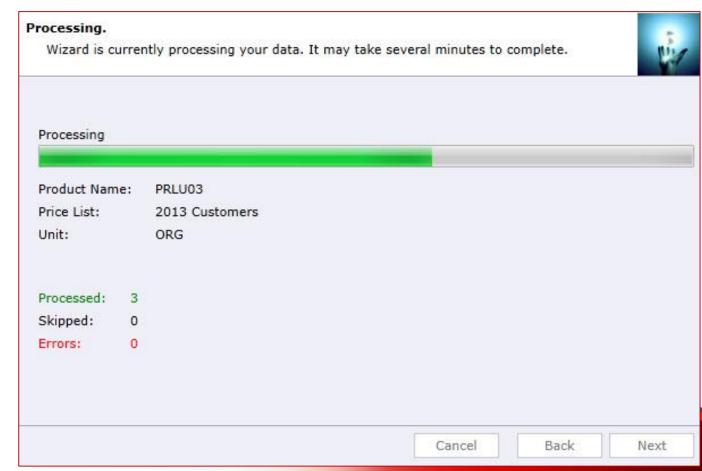
 Use "Back" button if you wish to make any changes.





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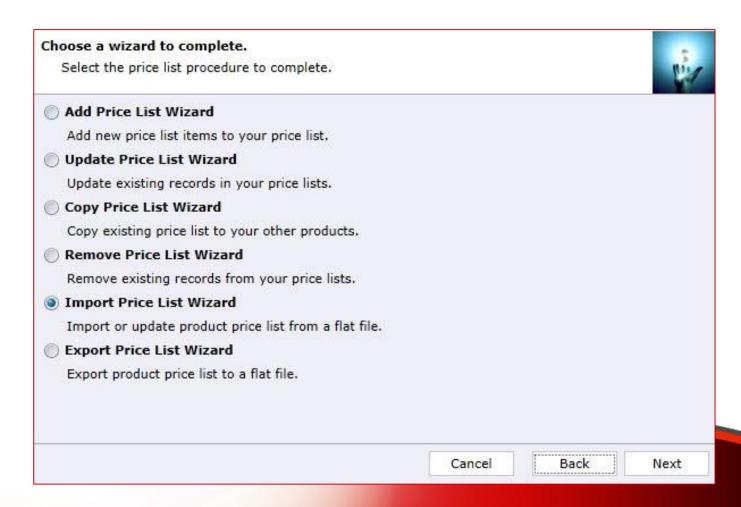


IMPORT PRICE LIST WIZARD



Choose a wizard to complete.

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

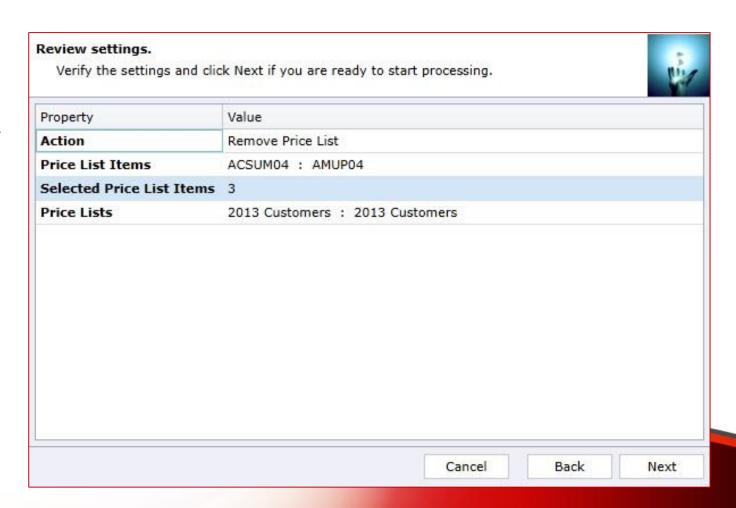




Review settings.

 Verify the settings you have selected.

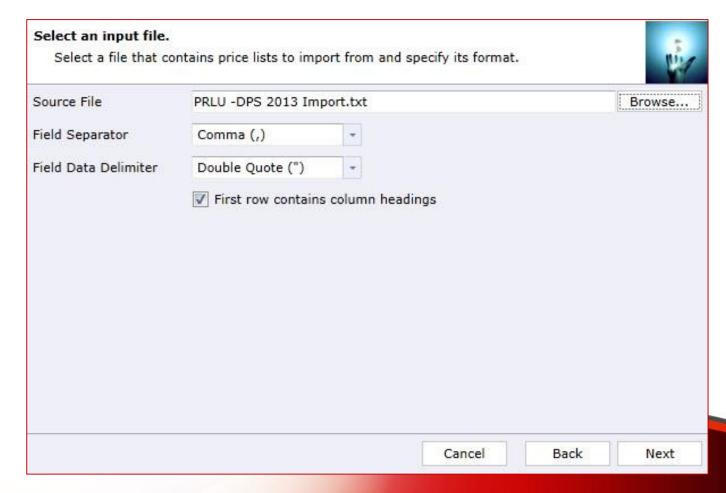
 Use "Back" button if you wish to make any changes.





Select an input file.

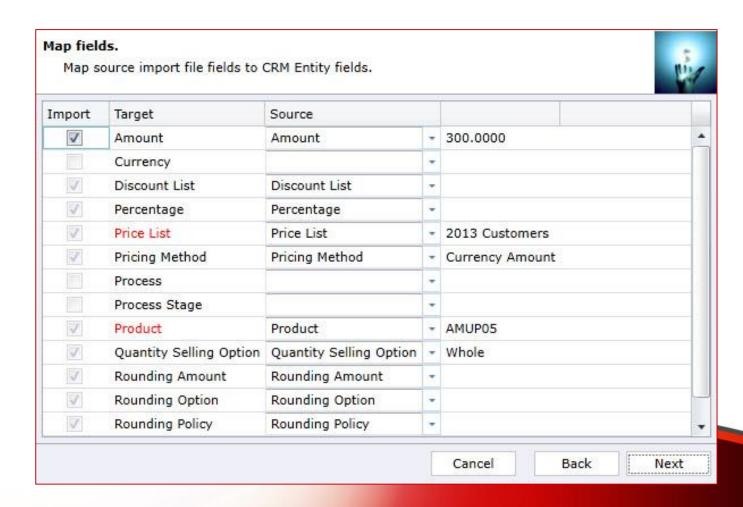
 Select a file that contains price list items to import or update.





Map fields.

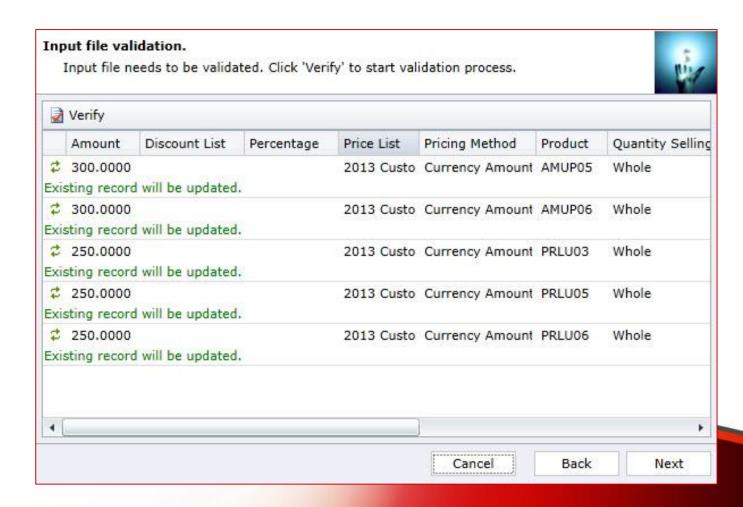
 Map source import file fields to CRM Entity fields.





Input file validation.

Validate the input file.

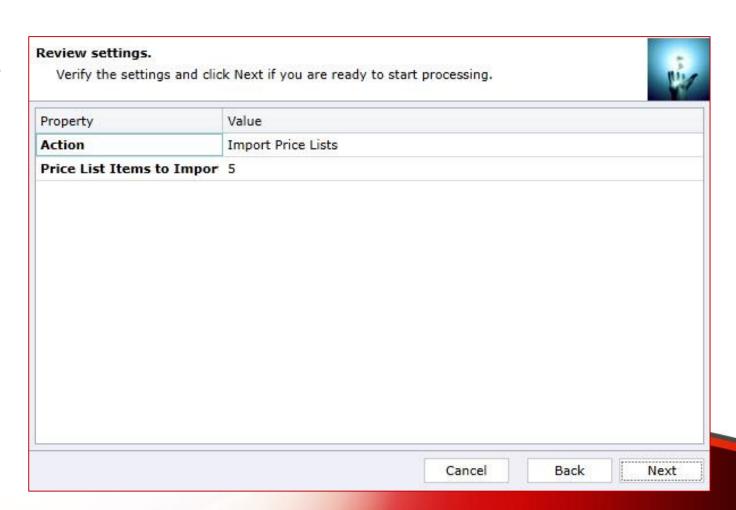




Review settings.

 Verify settings you have selected.

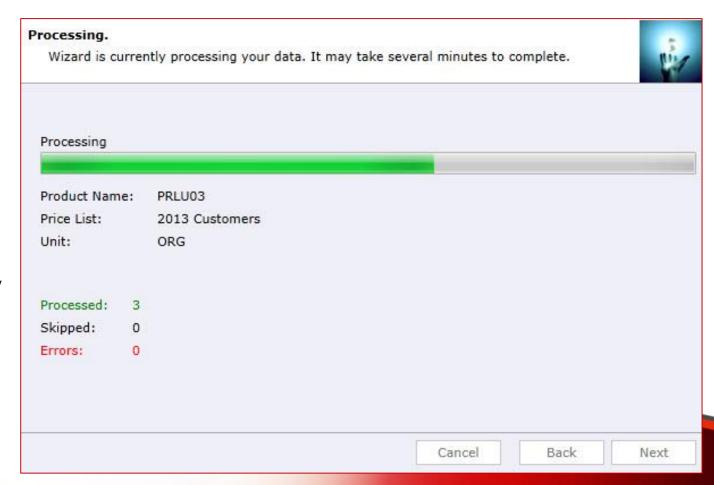
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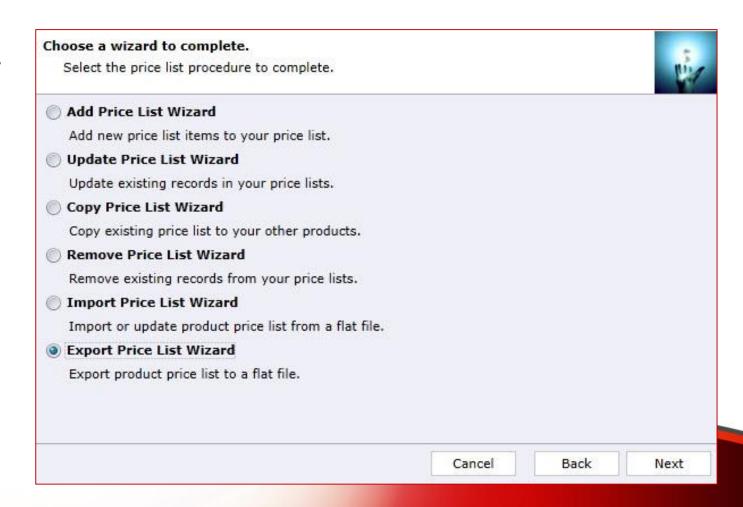


EXPORT PRICE LIST WIZARD



Choose a wizard to complete.

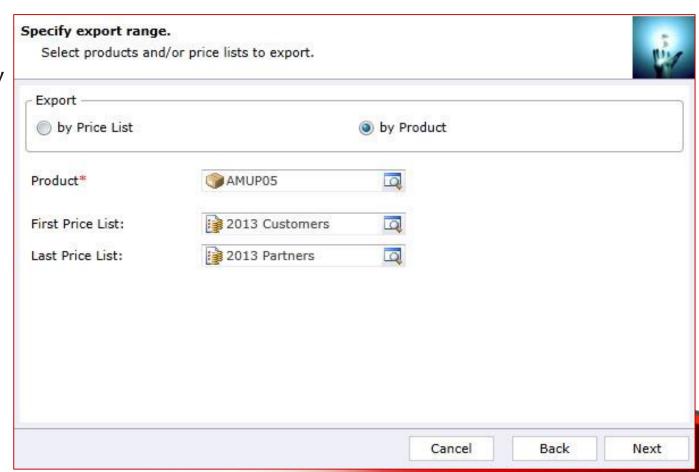
 Let's see how to export existing price list items





Specify export range.

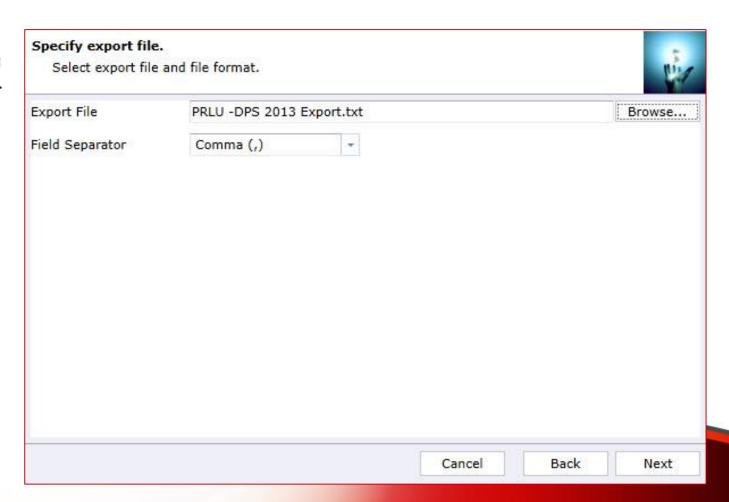
 Select how you want to identify records to export (by Price List or by Product)





Specify export file.

 Select location and format for the export file

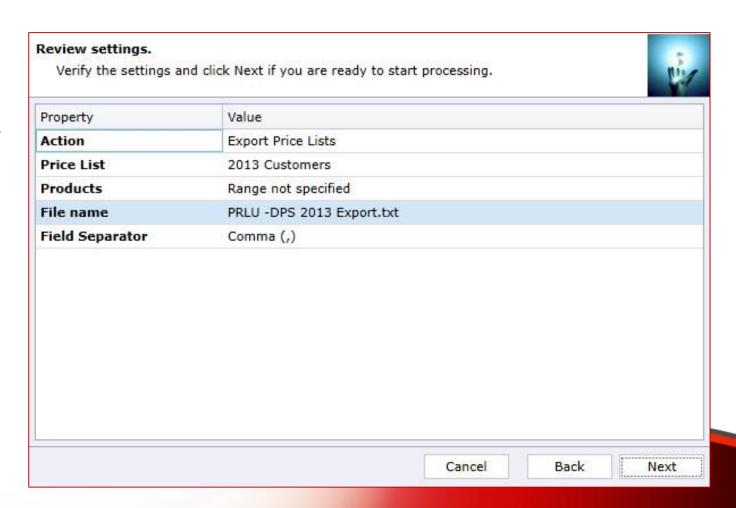




Review settings.

Verify the settings you have selected.

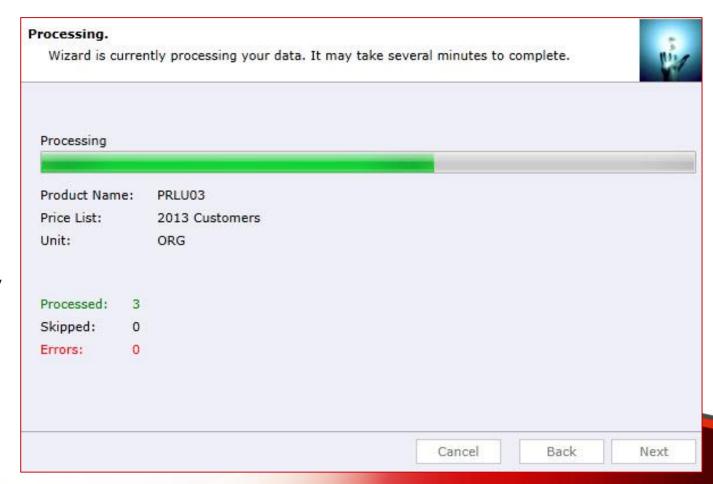
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