



Price List Utilities

- Price List Utilities is an add-on application specially designed for Dynamics CRM 365 v 9.x.
- Written in HTML 5 it seamlessly integrates with the latest version of the Dynamics CRM 365 v 9.x
- 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 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 lists items from one 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 flat file
 - set default price list on a product

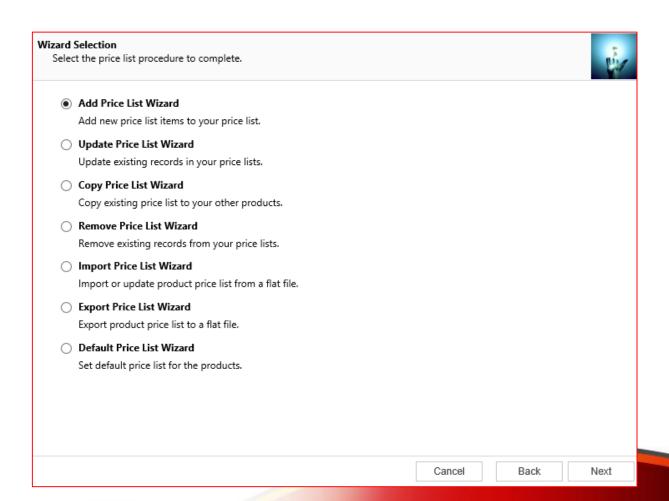


ADD PRICE LIST WIZARD



Choose a wizard to complete.

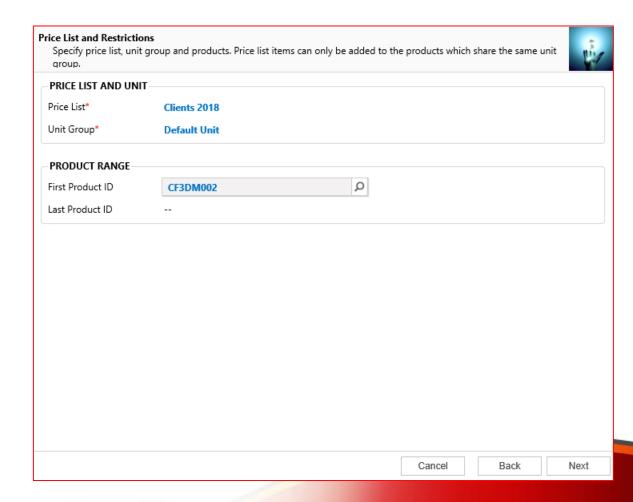
- Select the price list procedure you wish to complete.
- Appropriate wizard will guide you through the procedure.





Select a price list and restrictions.

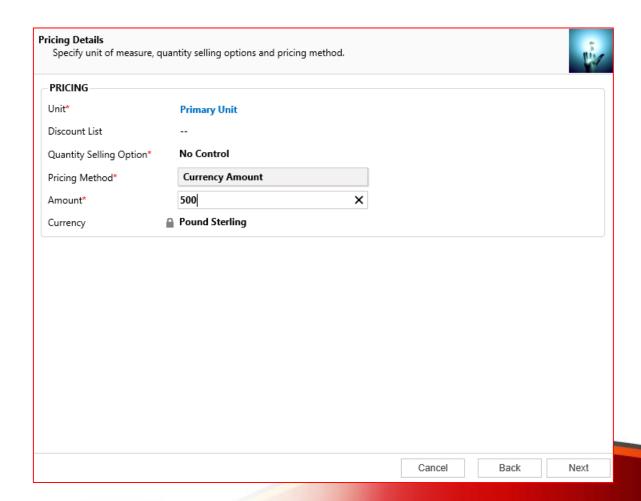
 Select a price list you wish to update by adding new price list items.
 Specify product range.





Specify pricing details.

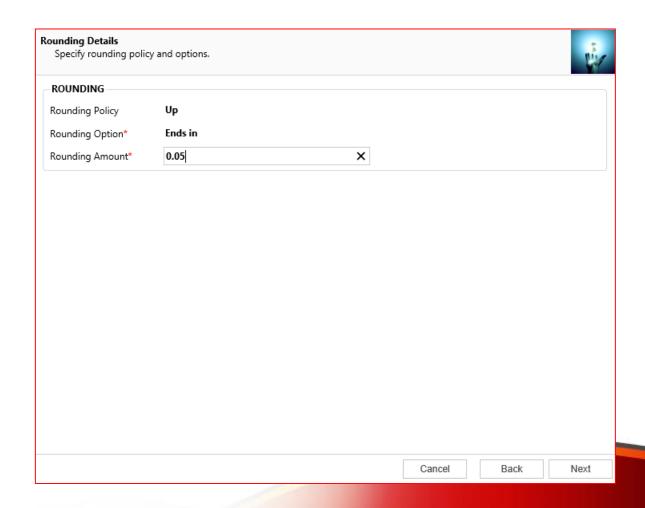
 Specify information for new price list item





Specify rounding details.

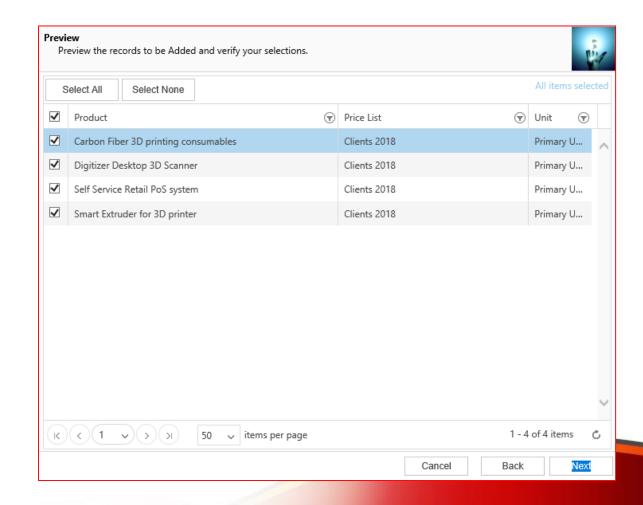
- Specify rounding details.
- This screen is not available if you have specified Currency Amount as a Pricing Method.





Preview the records to be added.

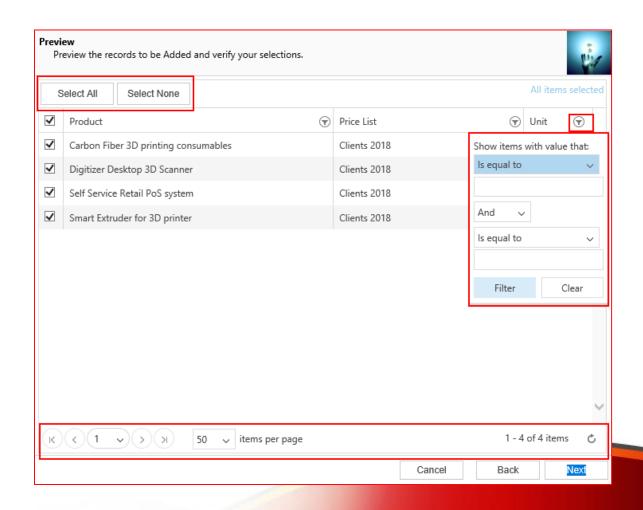
 Preview the records to be processed.





Preview the records to be added.

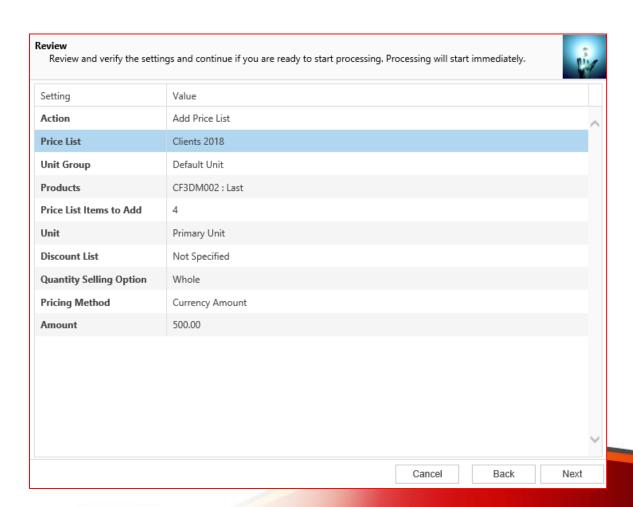
- use "Select All "button to quickly select records on all pages
- use "Select None" button to deselect records on all pages and ark records individually
- use filters to identify records





Review settings.

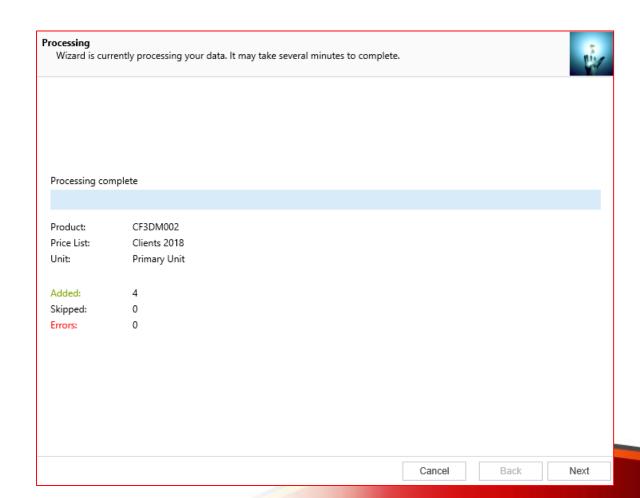
- Verify the settings you have selected.
- Use "Back" button if you wish to make any changes.





Processing.

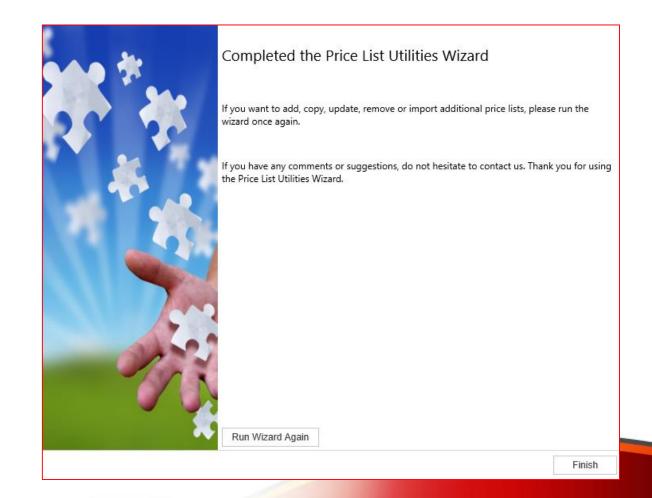
- Wizard will start processing.
- Use "Show Report" to see details in case there were any errors.





Completed the Price List Utilities Wizard.

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



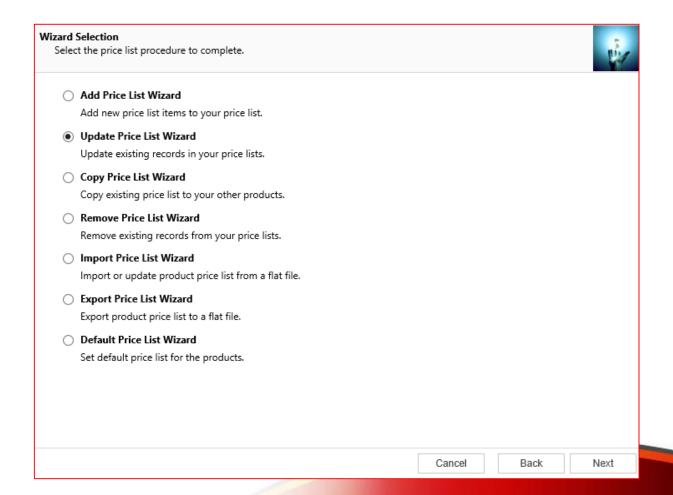


UPDATE PRICE LIST WIZARD



Choose a wizard to complete.

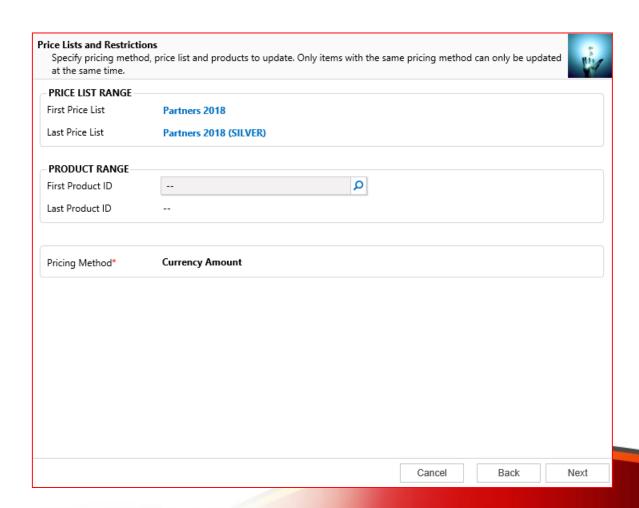
 Let's see how you can update existing records in your price list.





Enter restrictions.

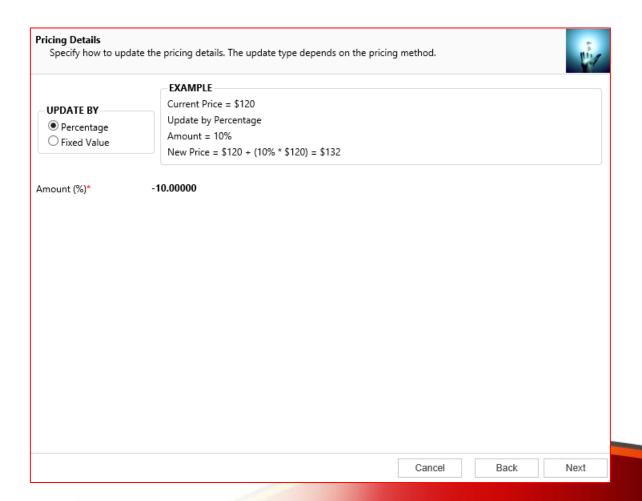
- You can update price list for a group of products that share the same pricing method.
- You can update multiple price list items at the same time.





Specify update details.

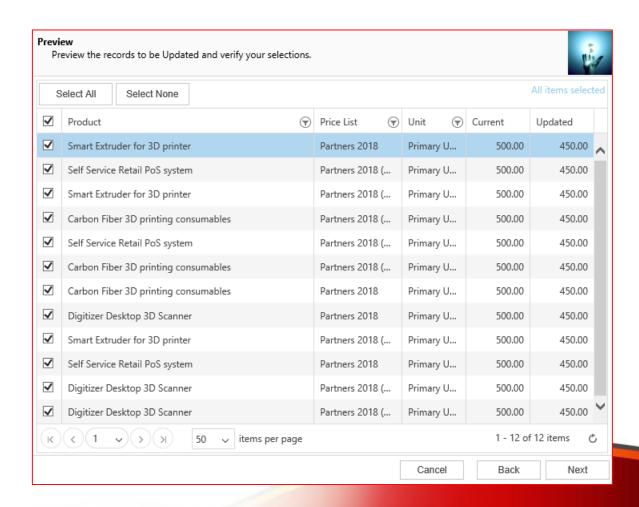
 Indicate how the price list information should be updated.





Preview the records to be updated.

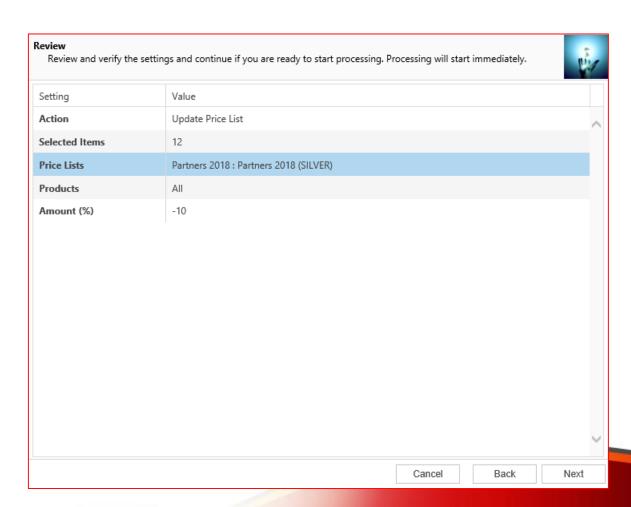
Preview the records to be processed.





Review settings.

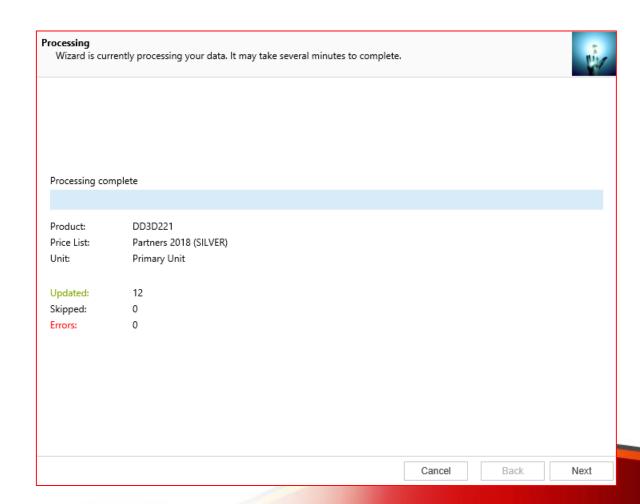
- Verify the settings you have selected.
- Use "Back" button if you wish to make any changes.





Processing.

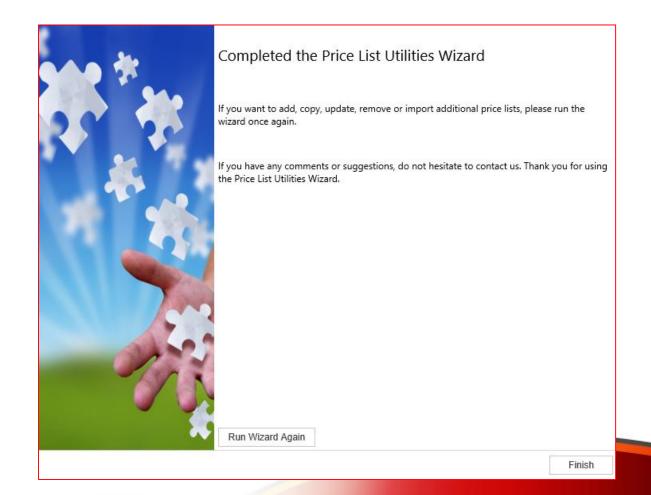
- Wizard will start processing.
- Use "Show Report" to see details in case there were any errors.





Completed the Price List Utilities Wizard.

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



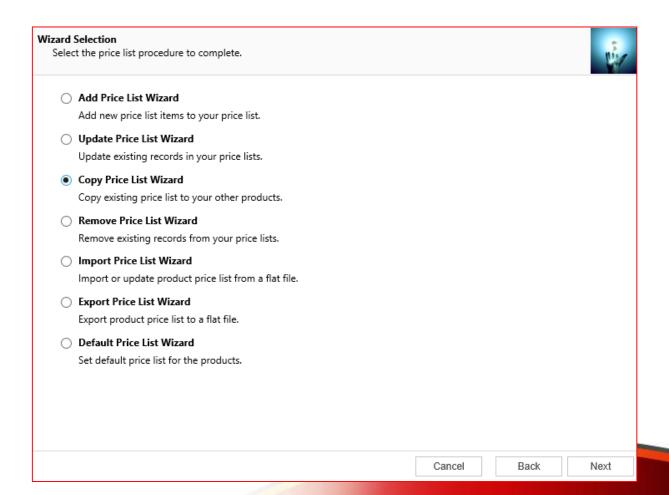


COPY PRICE LIST WIZARD



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.

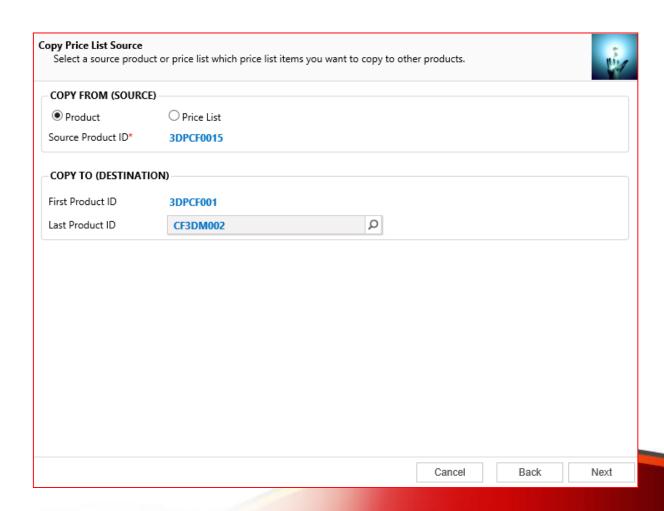




Select a source (Product or Price List)

 Select how you want to copy information.

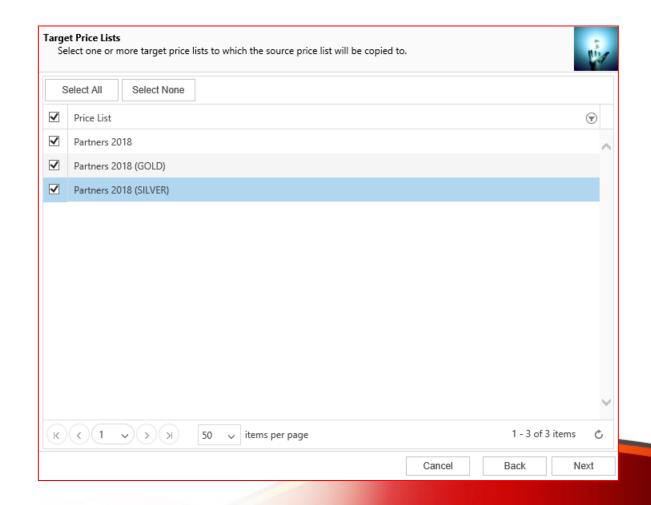
- You can copy price list items:
- from one Price
 List to one or
 more pricelists
- from one
 Product to other





Specify Target Price List.

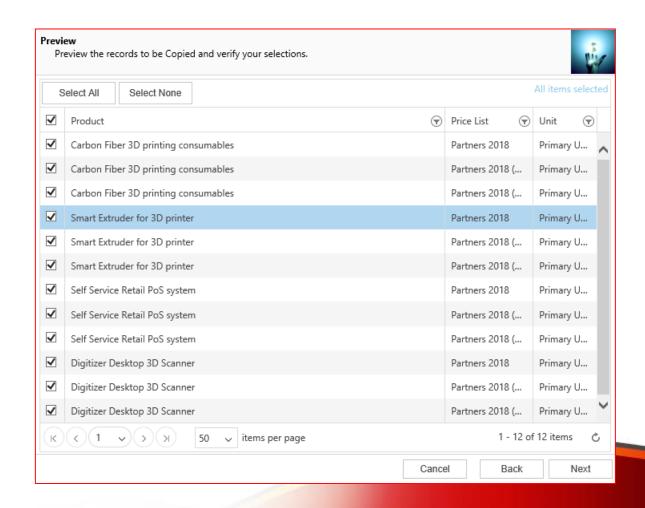
 This screen will only be available when you copy to multiple price lists.





Preview the records to be copied.

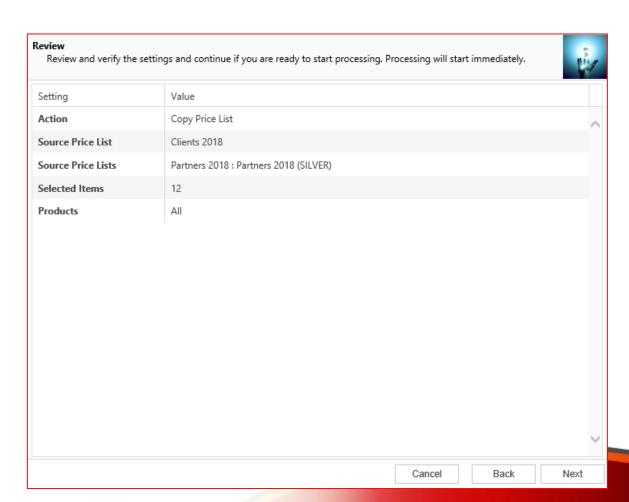
 Preview the records to be processed.





Review settings.

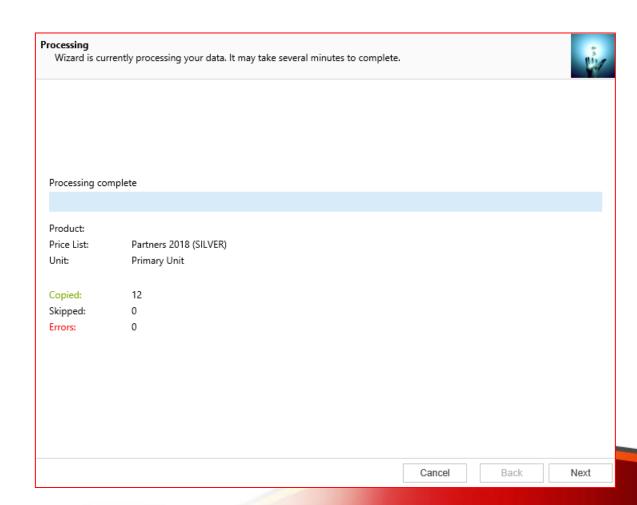
- Verify the settings you have selected.
- Use "Back" button if you wish to make any changes.





Processing.

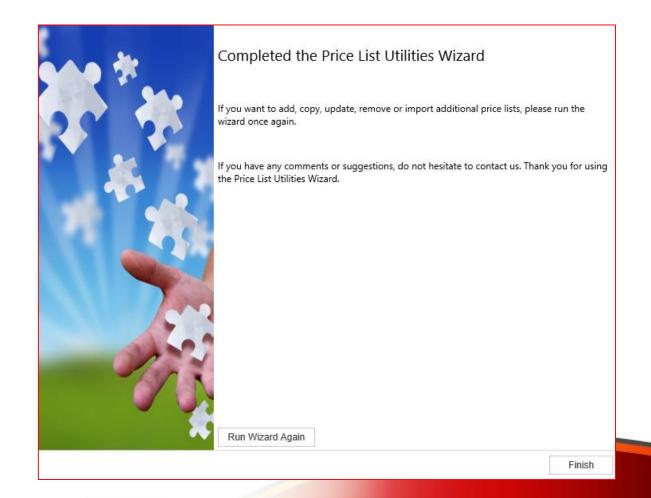
- Wizard will start processing.
- Use "Show Report" to see details in case there were any errors.





Completed the Price List Utilities Wizard.

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



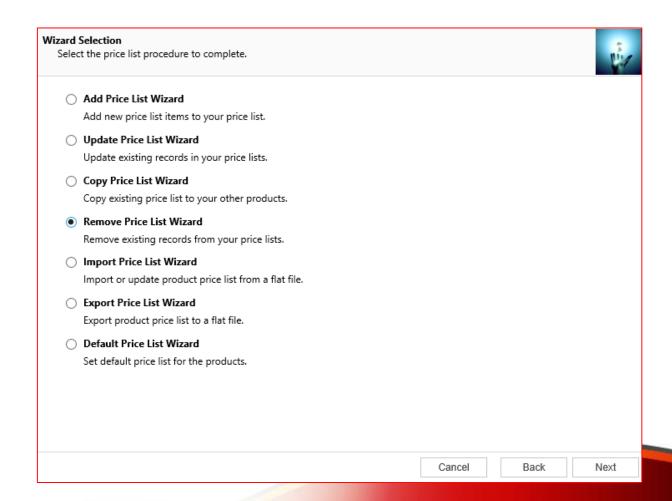


REMOVE PRICE LIST WIZARD



Choose a wizard to complete.

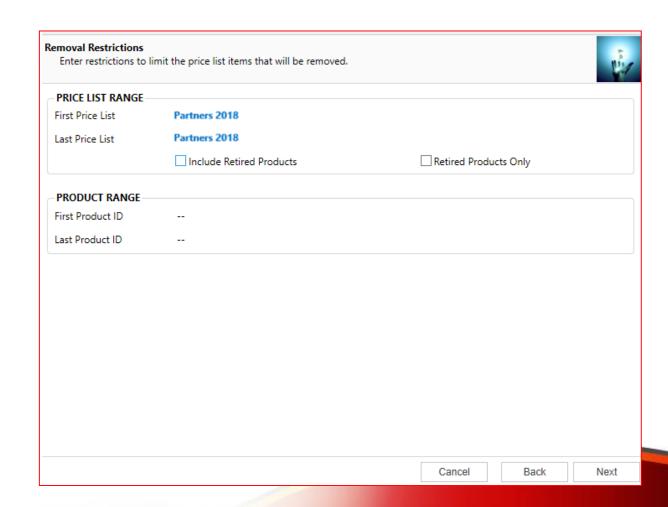
 Let's see how you can remove existing price list records.





Enter restrictions.

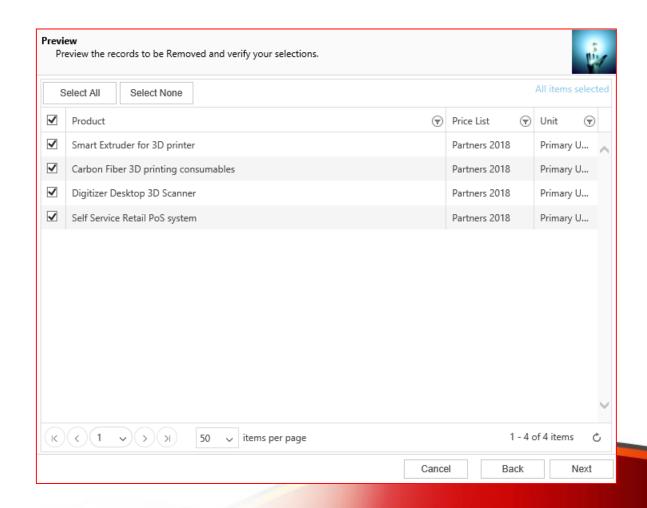
- Enter
 restrictions to
 limit price list
 items that well
 be removed.
- Remove price list items from only active, active and retired or only retired products.
- Use Price List or Products as ranges.





Preview the records to be removed.

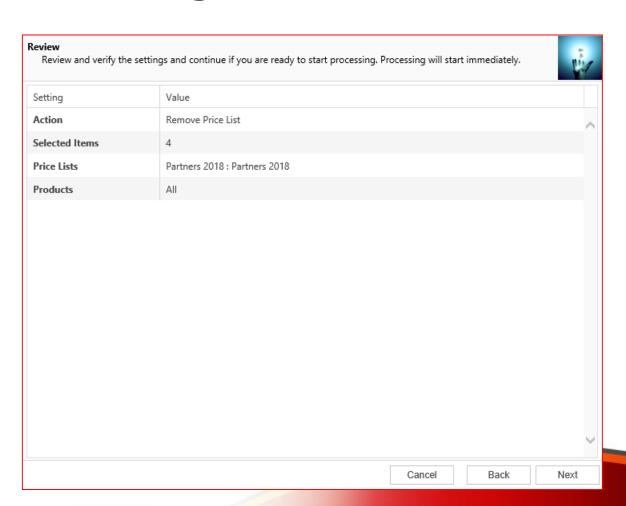
 Preview the records to be processed.





Review settings.

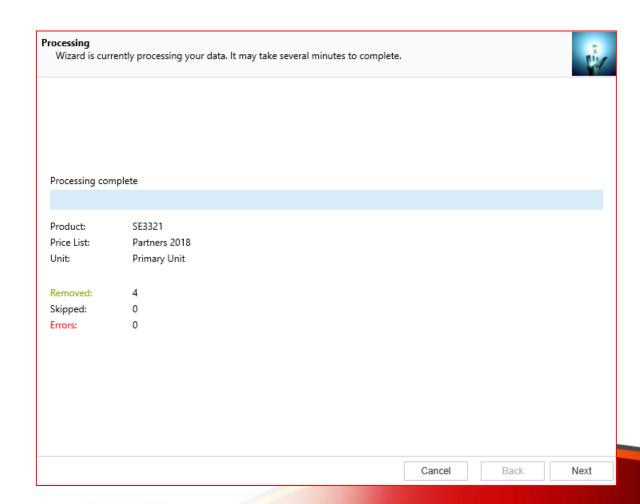
- Verify the settings you have selected.
- Use "Back" button if you wish to make any changes.





Processing.

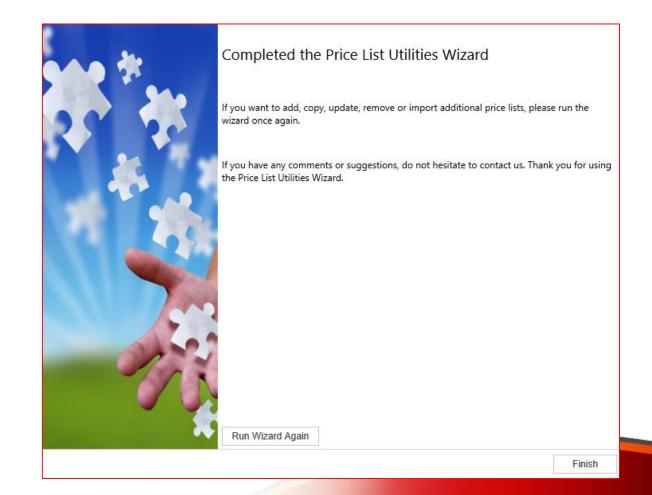
- Wizard will start processing.
- Use "Show Report" to see details in case there were any errors.





Completed the Price List Utilities Wizard.

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



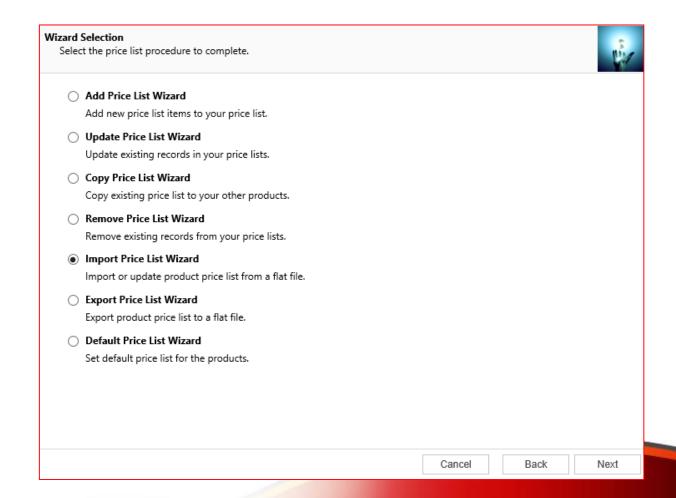


IMPORT PRICE LIST WIZARD



Choose a wizard to complete.

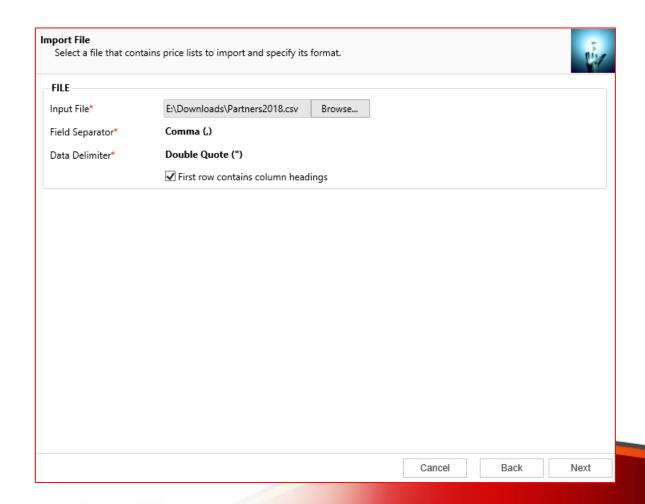
 Let's see how to import or update existing price list items





Select an input file.

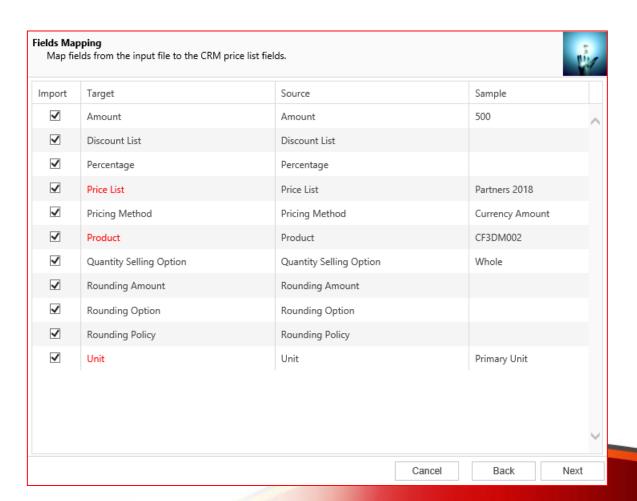
 Select a file that contains price list items to import or update.





Map fields.

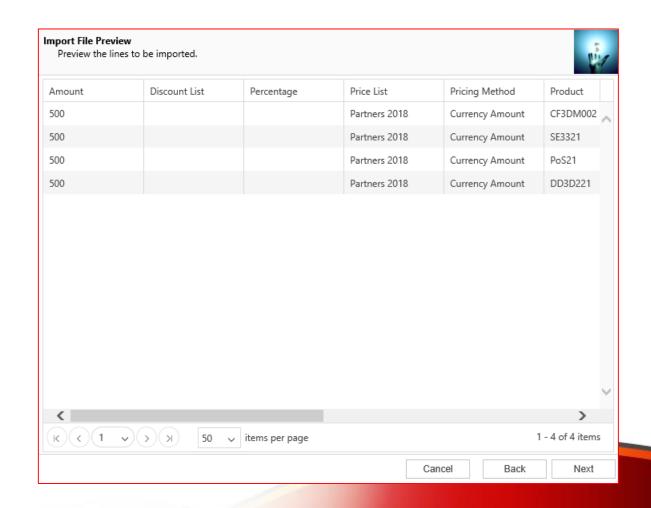
 Map source import file fields to CRM Entity fields.





Input file validation.

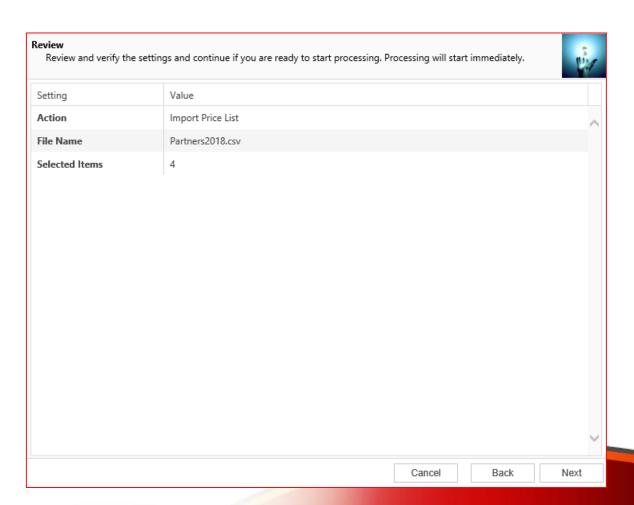
Validate the input file.





Review settings.

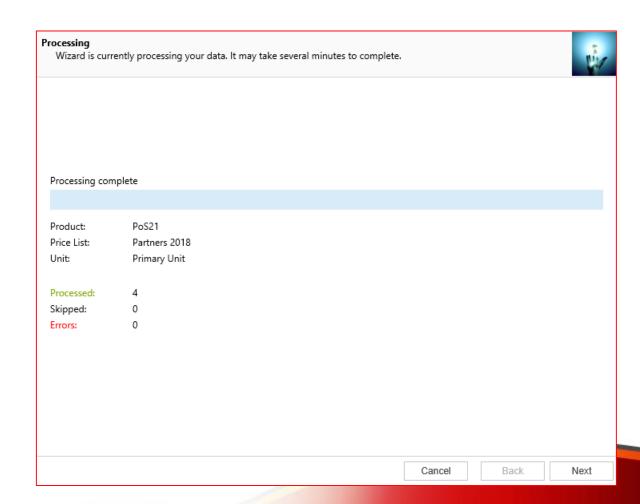
- Verify settings you have selected.
- Use "Back" button if you wish to make any changes





Processing.

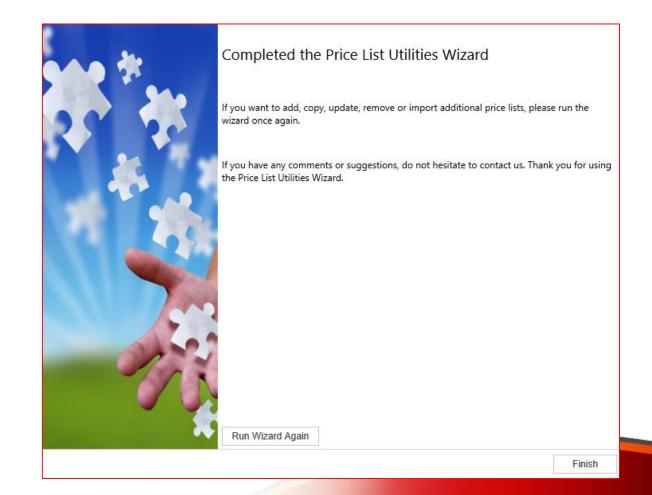
- Wizard will start processing.
- Use "Show Report" to see details in case there were any errors.





Completed the Price List Utilities Wizard.

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



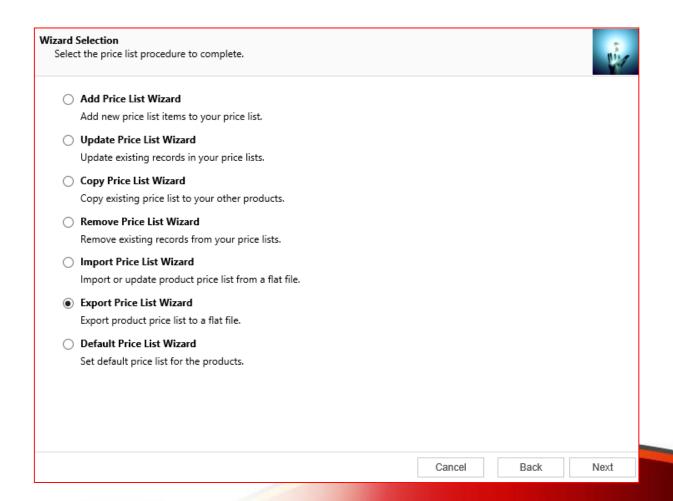


EXPORT PRICE LIST WIZARD



Choose a wizard to complete.

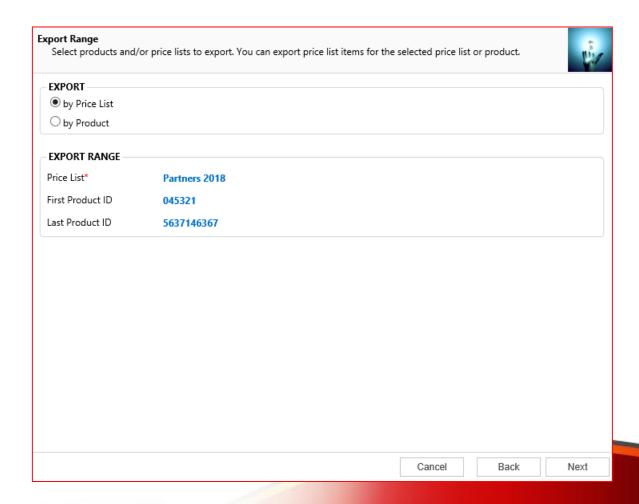
 Let's see how to export existing price list items





Specify export range.

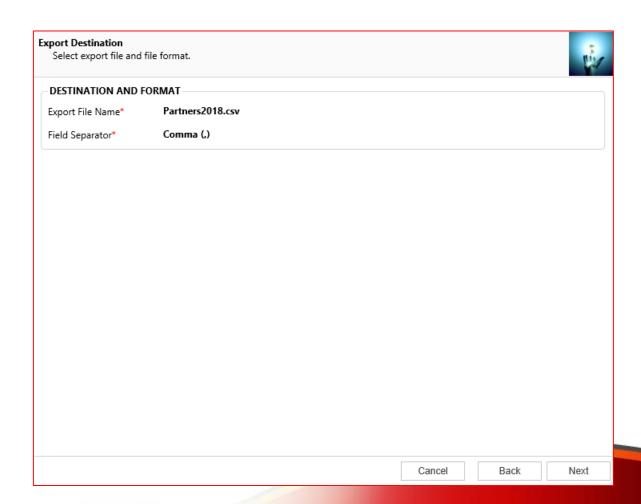
 Select how you want to identify records to export (by Price List or by Product)





Specify export file.

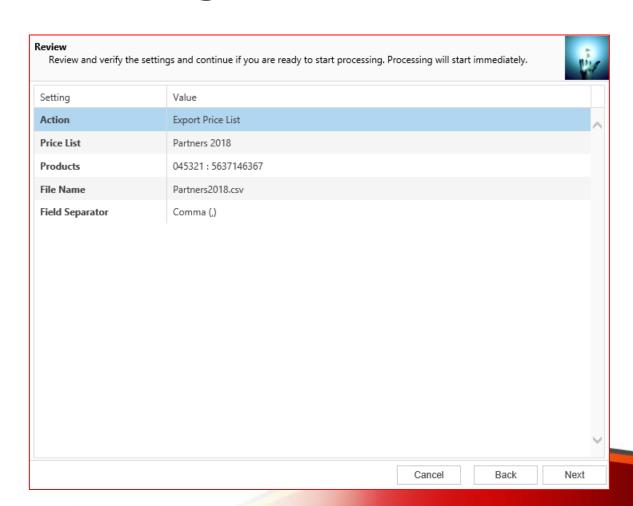
 Select location and format for the export file





Review settings.

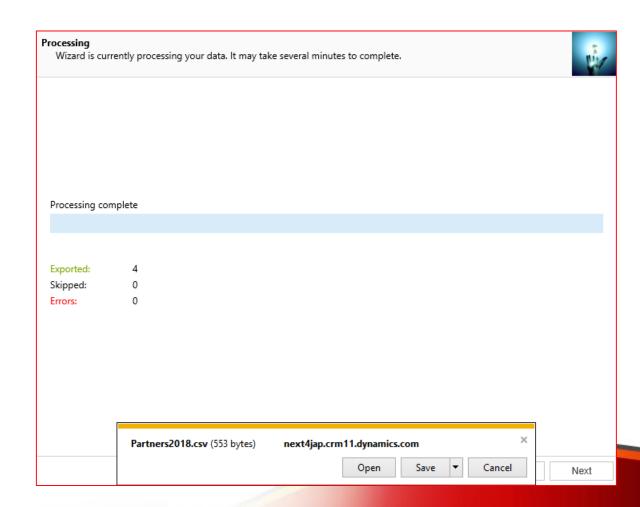
- Verify the settings you have selected.
- Use "Back" button if you wish to make any changes.





Processing.

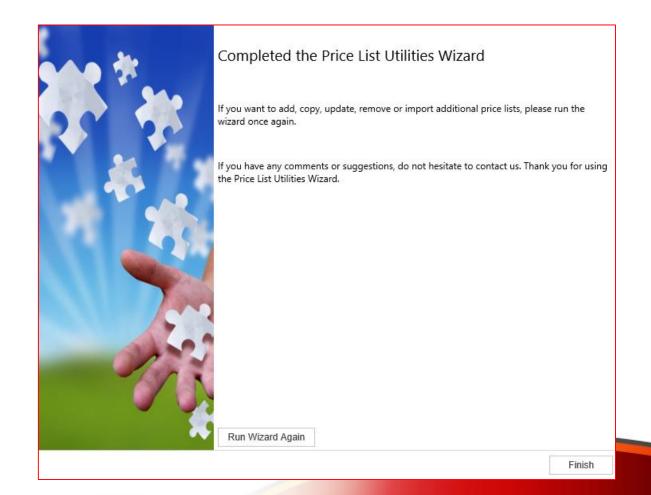
- Wizard will start processing.
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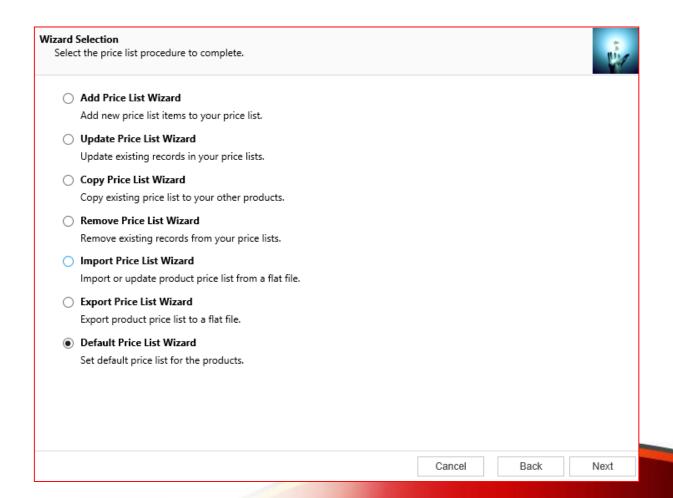


DEFAULT PRICE LIST WIZARD



Choose a wizard to complete.

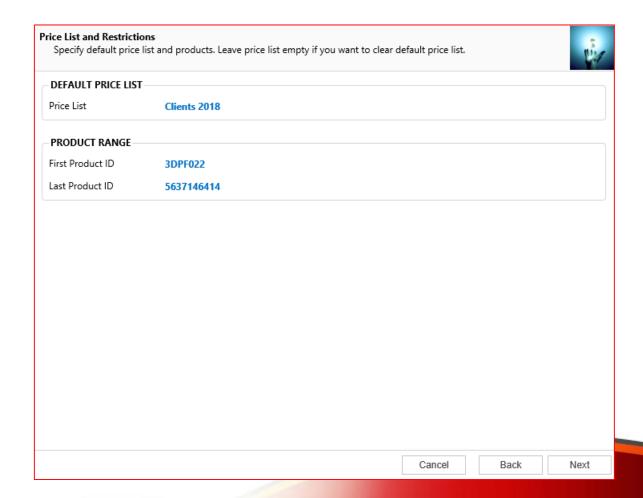
 Let's see how to set a default Price List on a product





Price List and Restrictions

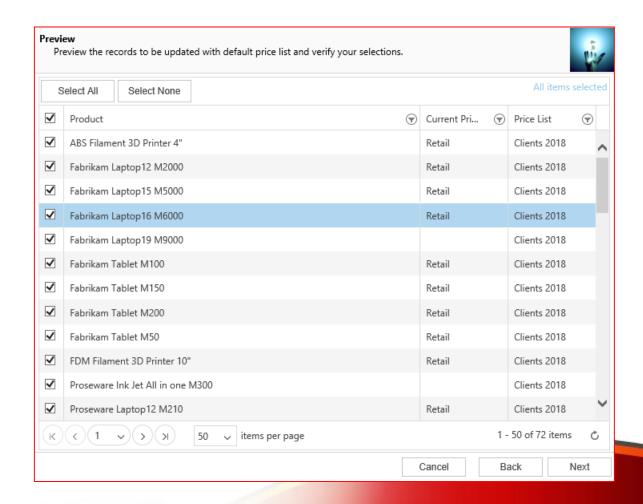
 Select the Price List you want to set as default and range of products you want to update.





Preview the records to be updated.

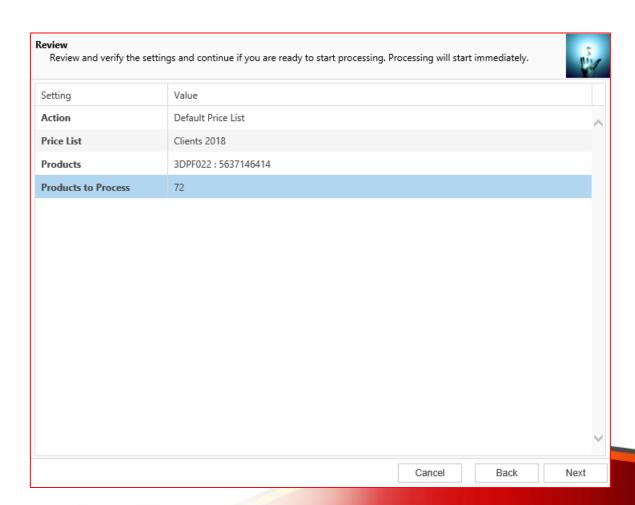
Preview the records to be processed.





Review settings.

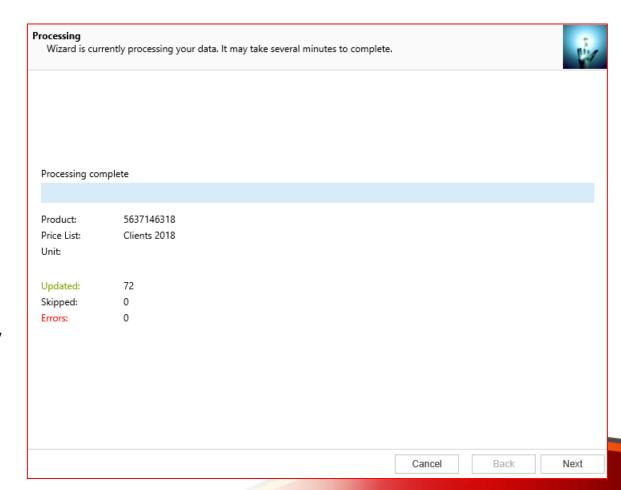
- Verify the settings you have selected.
- Use "Back" button if you wish to make any changes.





Processing.

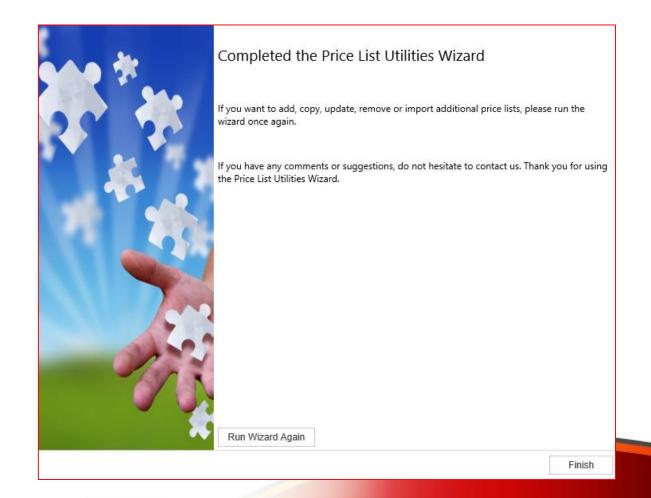
- Wizard will start processing.
- Use "Show Report" to see details in case there were any errors.





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 - 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



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