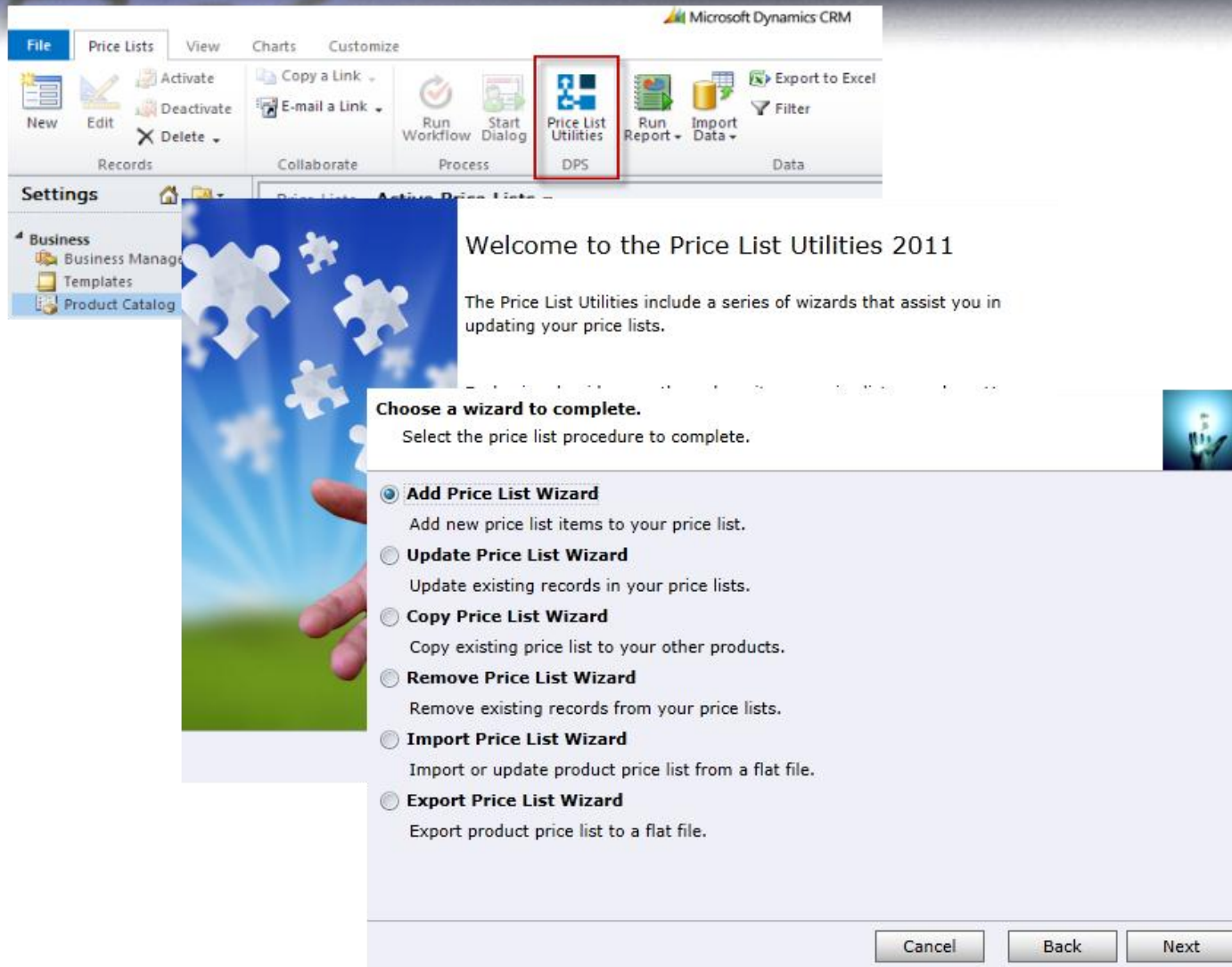# Price List Utilities

- 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**
  - **remove price lists**
  - **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**

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

Price List Utilities

- Written in Silverlight it seamlessly integrates with the latest version of the Microsoft Dynamics CRM 2011.

- 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.

- Demo version is fully functional, but allows only five records to be processed.

Add Price List Wizard

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]　[Back]　[Next]

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

Select a price list and restrictions.

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

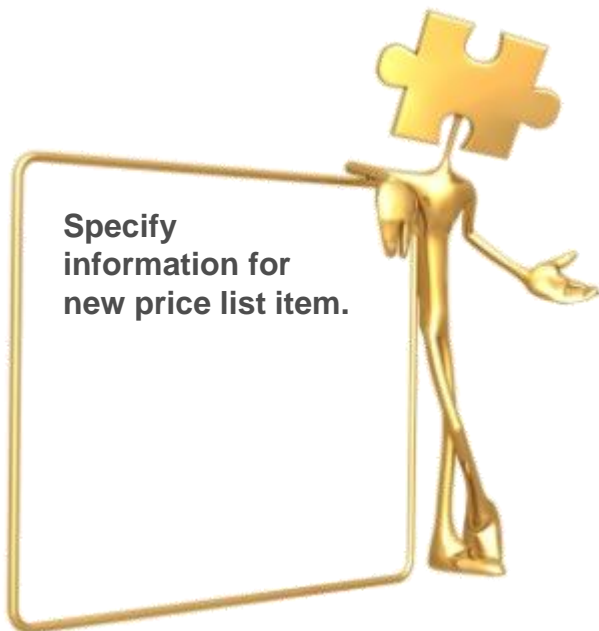|	
Price List*	2011 Gold
Unit Group*	Each
First Product ID	Raw Material 001
Last Product ID	Raw Material 006

Cancel   Back   Next

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

Specify pricing details.

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

Unit*   Each

Discount List

Quantity Selling Option*   No Control

Pricing Method*   Currency Amount

Amount*   250.00

Currency   Pound Sterling

Cancel   Back   Next

Specify information for new price list item.

Specify rounding details.

Specify rounding policy and options.

Rounding Policy	None ▾
Rounding Option	▾
Rounding Amount	0.00 ⬍

Cancel Back Next

Specify rounding details.

This screen is not available if you have specified Currency Amount as Pricing Method.
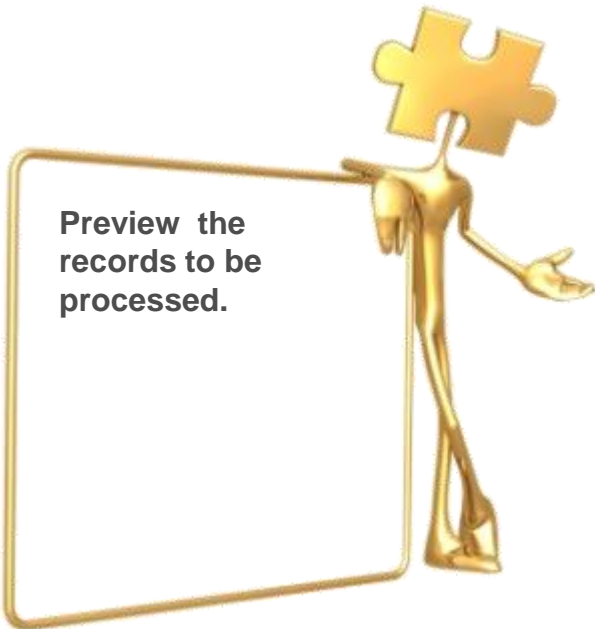
Preview the records to be added.

Preview the records to be processed and verify your selections.

☑ Select All   ☐ Select None

	Product	Price List	Unit
☑	Raw Material 001	2011 Gold	Each
☑	Raw Material 002	2011 Gold	Each
☑	Raw Material 003	2011 Gold	Each
☑	Raw Material 004	2011 Gold	Each
☑	Raw Material 005	2011 Gold	Each
☑	Raw Material 006	2011 Gold	Each

Cancel   Back   Next

Preview the records to be processed.

Review settings.

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

| Property	Value
Action	Add Price List
Price List	2011 Gold
Unit Group	Each
Price List Items	Raw Material 001 : Raw Material 006
Selected Price List Items	6
Unit	Each
Discount List	Not specified
Quantity Selling Option	No Control
Pricing Method	Currency Amount
Amount	250.00000

Cancel   Back   Next

Verify the settings you have selected.

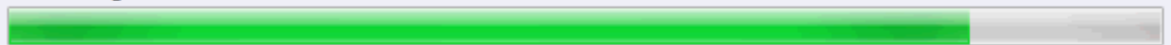**Use "Back" button if you wish to make any changes.**
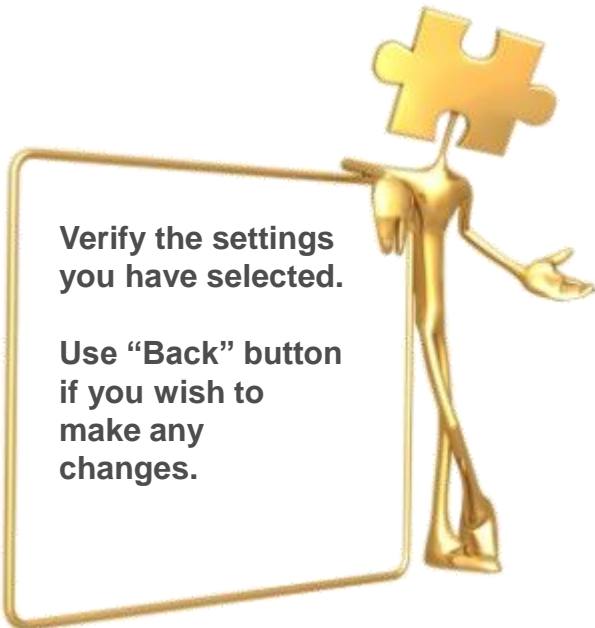
Processing.

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

Processing

Product Name: Raw Material 005
Price List: 2011 Gold
Unit: Each

Added: 5
Skipped: 0
Errors: 0

Cancel   Back   Next

**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 add, copy, update, remove or import additional price lists, please run the wizard once again.

If you have any comments or suggestions, do not hesitate to contact us. Thank you for using the Price List Utilities Wizard.

Run Wizard Again

http://www.dynamics-pros.com

Finish

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

Update Price List Wizard

Choose a wizard to complete.
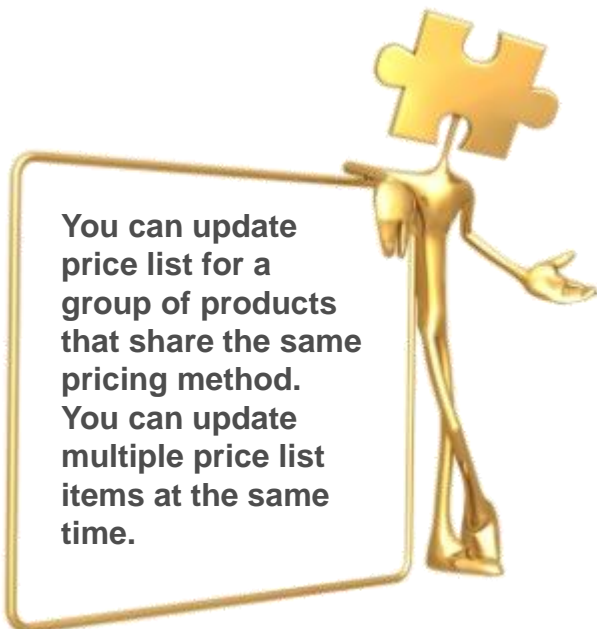
Select the price list procedure to complete.

○ **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   Back   Next

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

Enter restrictions.

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

Price List

From   2011 Gold

To   2011 Gold

Product

From   Finish Product 001

To   Raw Material 006

Pricing Method*   Currency Amount

Cancel   Back   Next

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.

Update By:

- ⦿ Percentage
- ○ Fixed

Example:

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

Amount (%)*   20.00000 ⇕

Cancel   Back   Next

Indicate how the price list information should be updated.
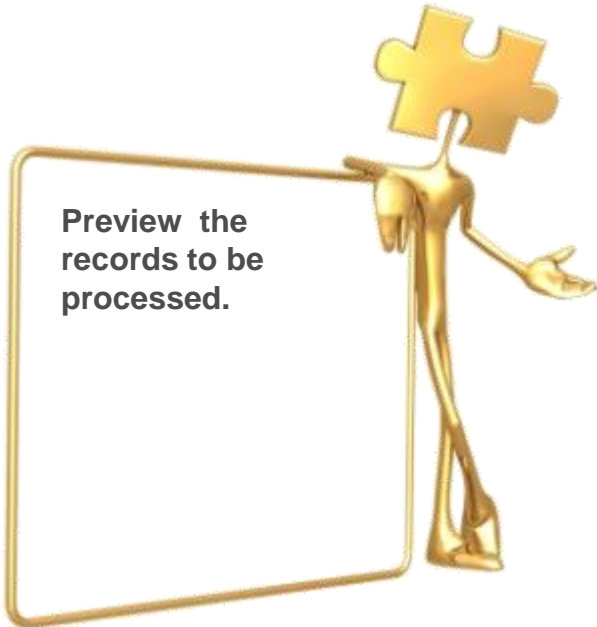
Preview the records to be updated.

Preview the records to be processed and verify your selections.

☑ Select All ☐ Select None

	Product	Price List	Unit	Current	Updated
☑	Raw Material 001	2011 Gold	Each	250.00	300.00
☑	Raw Material 002	2011 Gold	Each	250.00	300.00
☑	Raw Material 003	2011 Gold	Each	250.00	300.00
☑	Raw Material 004	2011 Gold	Each	250.00	300.00
☑	Raw Material 005	2011 Gold	Each	250.00	300.00
☑	Raw Material 006	2011 Gold	Each	250.00	300.00
☑	Finish Product 001	2011 Gold	Each	1250.00	1500.00
☑	Finish Product 002	2011 Gold	Each	1250.00	1500.00
☑	Finish Product 003	2011 Gold	Each	1250.00	1500.00
☑	Finish Product 004	2011 Gold	Each	1250.00	1500.00
☑	Finish Product 005	2011 Gold	Each	1250.00	1500.00

Cancel   Back   Next

Preview the records to be processed.

Review settings.

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

Property	Value
Action	Update Price List
Price List Items	Finish Product 001 : Raw Material 006
Selected Price List Items	11
Price Lists	2011 Gold : 2011 Gold
Update Mode	Percentage
Update Amount	20.00000

Cancel   Back   Next

Verify the settings you have selected.

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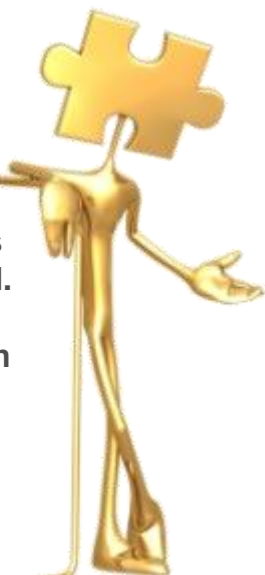
Processing.

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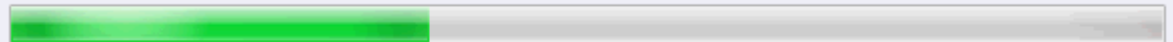
Processing

Product Name: Raw Material 004
Price List: 2011 Gold
Unit: Each

Updated: 4
Skipped: 0
Errors: 0

Cancel   Back   Next

Wizard will start processing.

If there were any errors Use "Show Report" to see details.

Completed the Price List Utilities Wizard

If you want to add, copy, update, remove or import additional price lists, please run the wizard once again.

If you have any comments or suggestions, do not hesitate to contact us. Thank you for using the Price List Utilities Wizard.

Run Wizard Again

http://www.dynamics-pros.com

Finish

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

Copy Price List Wizard

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 | Back | Next |

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

Copy From (source)

- ⦿ Product Price Lists   ◯ Price List

Product*   📦 IV001   🔍

Copy To (destination)

First Product ID   [|] 🔍

Last Product ID   [ ] 🔍

Cancel   Back   Next

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

Price List*   📄 2013 Customers   🔍

Copy To (destination)

Target Price List*   📄 2013 Partners   🔍

First Product ID   [   ]   🔍

Last Product ID   [   ]   🔍

Cancel   Back   Next

Select a source Price List

Specify products you want to copy price information to.
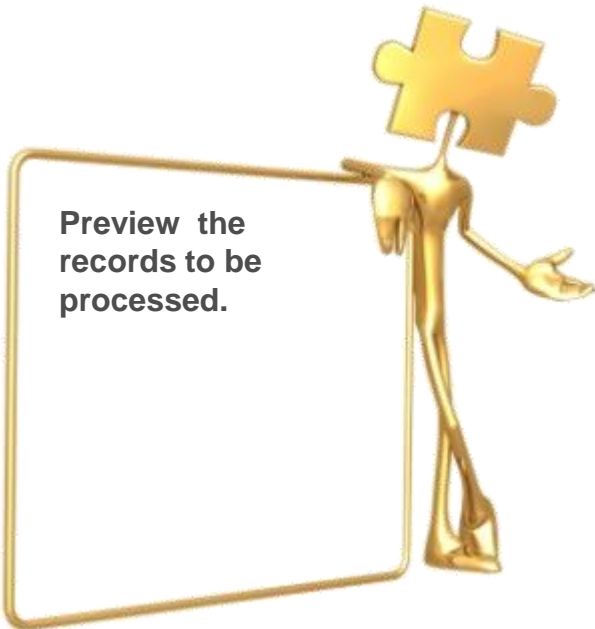
Preview the records to be copied.

Preview the records to be processed and verify your selections.

☑ Select All   ☐ Select None

	Product	Price List	Unit
☑	Finish Product 002	2011 Gold	Each
☑	Finish Product 003	2011 Gold	Each
☑	Finish Product 004	2011 Gold	Each
☑	Finish Product 005	2011 Gold	Each

Cancel   Back   Next

Preview the records to be processed.

Review settings.

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

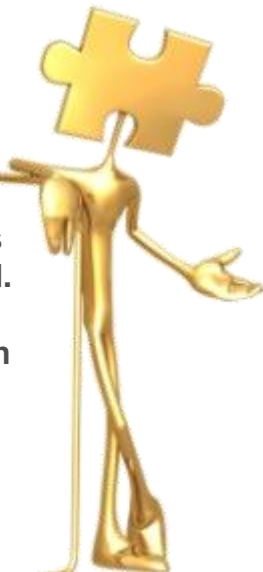| Property	Value
Action	Copy Price List
Source Product	Finish Product 001
Unit Group	Each
Price List Items	Finish Product 002 : Finish Product 005
Selected Price List Items	4

Cancel | Back | Next

Verify the settings you have selected.

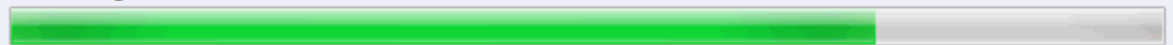**Use "Back" button if you wish to make any changes.**

Processing.

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

Processing

Product Name: Finish Product 004
Price List: 2010 Gold
Unit: Each

Copied: 3
Skipped: 0
Errors: 0

Cancel   Back   Next

Wizard will start processing.

If there were any errors Use "Show Report" to see details.

Completed the Price List Utilities Wizard

If you want to add, copy, update, remove or import additional price lists, please run the wizard once again.

If you have any comments or suggestions, do not hesitate to contact us. Thank you for using the Price List Utilities Wizard.

Run Wizard Again

http://www.dynamics-pros.com

Finish

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

Remove Price List Wizard

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 | Back | Next |

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

Enter restrictions.

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

Price List

| From | 📇 2011 Gold | 🔍 |
| To | 📇 2011 Gold | 🔍 |

Product

| From | 📦 Finish Product 001 | 🔍 |
| To | 📦 Raw Material 006 | 🔍 |

Pricing Method*   Currency Amount ▼

Cancel   Back   Next

Enter restrictions to limit price list items that well be removed.

Use Price List or Products as ranges.
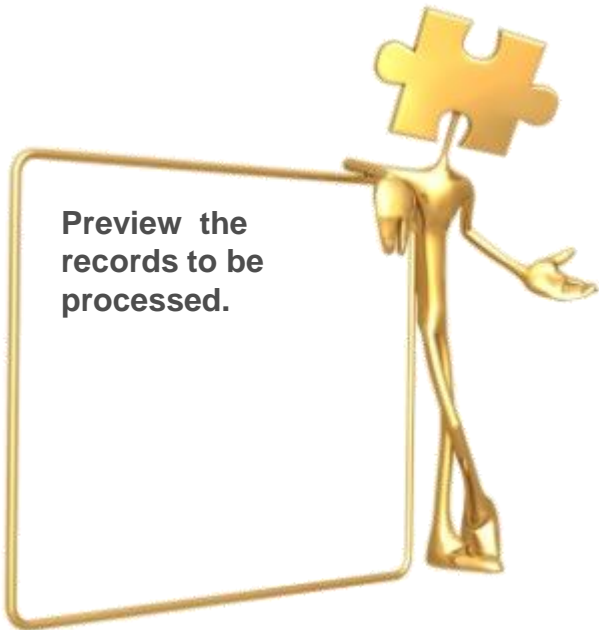
Preview the records to be removed.

Preview the records to be processed and verify your selections.

☑ Select All ☐ Select None

	Product	Price List	Unit
☑	Finish Product 001	2010 Gold	Each
☑	Finish Product 002	2010 Gold	Each
☑	Finish Product 003	2010 Gold	Each

Cancel   Back   Next

Preview the records to be processed.

Review settings.

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

Property	Value
Action	Remove Price List
Price List Items	Finish Product 001 : Finish Product 003
Selected Price List Items	3
Price Lists	2010 Gold : 2010 Gold

Cancel   Back   Next

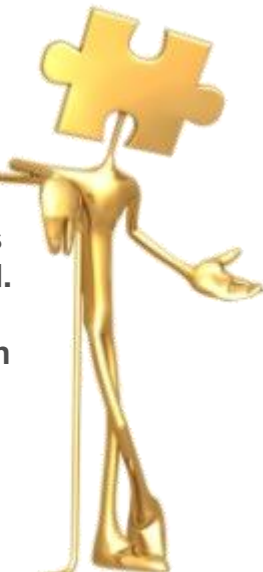Verify the settings you have selected.

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

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

Processing complete

Removed:	3
Skipped:	0
Errors:	0

Cancel   Back   Next

Wizard will start processing.

If there were any errors Use "Show Report" to see details.

Completed the Price List Utilities Wizard

If you want to add, copy, update, remove or import additional price lists, please run the wizard once again.

If you have any comments or suggestions, do not hesitate to contact us. Thank you for using the Price List Utilities Wizard.

Run Wizard Again

http://www.dynamics-pros.com

Finish

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

Import Price List Wizard

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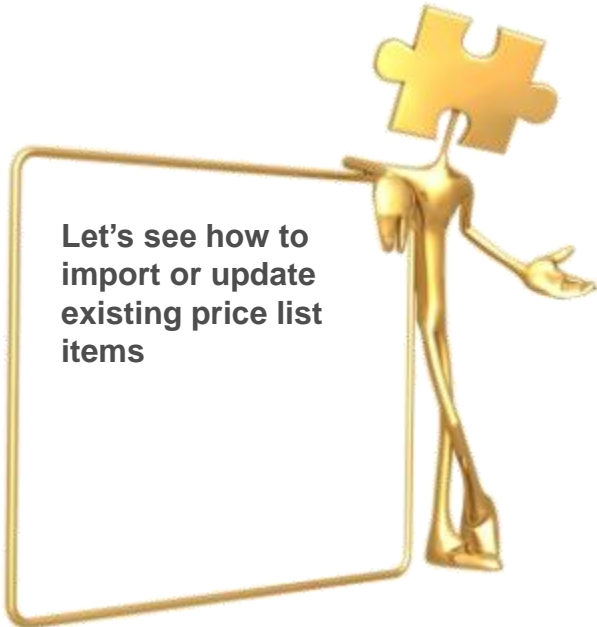
Let's see how to import or update existing price list items

Select an input file.

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

Source File	DPS_PriceList Items.csv [Browse...]
Field Separator	Comma (,) ▾
Field Data Delimiter	Double Quote (") ▾
	☑ First row contains column headings

[Cancel] [Back] [Next]

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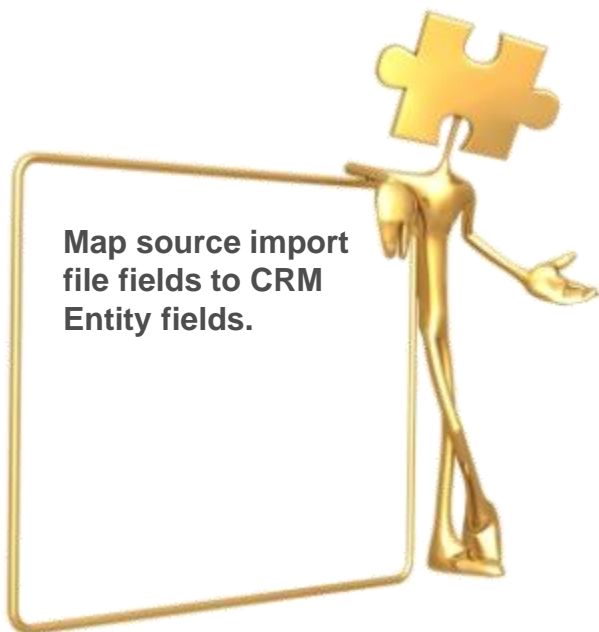
Map fields.

Map source import file fields to CRM Entity fields.

Import	Target	Source	
☑	Amount	Amount ▾	500
☐	Discount List	▾	
☑	Percentage	Percentage ▾	
☑	Price List	Price List ▾	Standard Customers Pricelist
☑	Pricing Method	Pricing method ▾	Amount
☑	Product	Product ▾	Raw Material 001
☐	Quantity Selling Option	▾	
☐	Rounding Amount	▾	
☐	Rounding Option	▾	
☐	Rounding Policy	▾	
☑	Unit	Unit ▾	Each

Cancel Back Next

Map source import file fields to CRM Entity fields.

Input file validation.

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

	Amount	Percentage	Price List	Pricing Method	Product	Unit	
☀	500		Standard C	Currency Amount	Raw Mate	Each	
New record will be created.							
☀	500		Standard C	Currency Amount	Raw Mate	Each	
New record will be created.							
☀	500		Standard C	Currency Amount	Raw Mate	Each	
New record will be created.							
☀	500		Standard C	Currency Amount	Raw Mate	Each	
New record will be created.							
☀	500		Standard C	Currency Amount	Raw Mate	Each	
New record will be created.							

Verify

Cancel   Back   Next

Validate the input file.
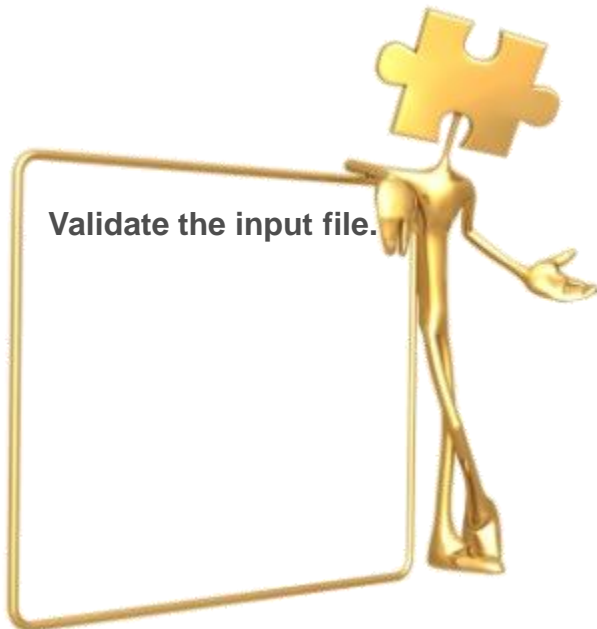
Price List Wizard

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	16

Cancel   « Back   Next »

Verify settings you have selected.

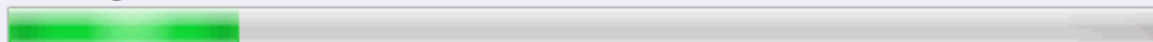Use "Back" button if you wish to make any changes

Processing.

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

Processing

Product Name: Raw Material 001
Price List: Standard Customers Pricelist
Unit: Each

Processed: 1
Skipped: 0
Errors: 0

Cancel   Back   Next

Wizard will start processing.

Processing.

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

Processing complete

Processed: 5
Skipped: 0
Errors: 0

Cancel   Back   Next

Wizard will start processing.

Completed the Price List Utilities Wizard

If you want to add, copy, update, remove or import additional price lists, please run the wizard once again.

If you have any comments or suggestions, do not hesitate to contact us. Thank you for using the Price List Utilities Wizard.
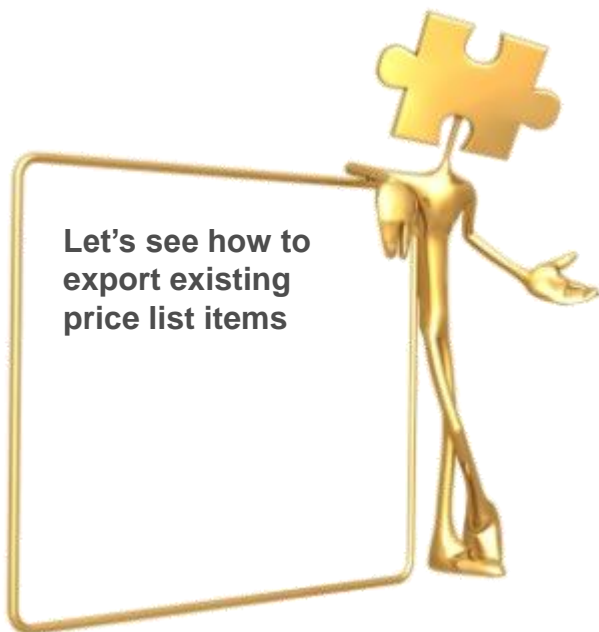
Run Wizard Again

http://www.dynamics-pros.com

Finish

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

Export Price List Wizard

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   Back   Next

Let's see how to export existing price list items

Specify export range.

Select products and/or price lists to export.

Export

◉ by Price List   ◯ by Product

Price List*   2013 Customers

First Product ID

Last Product ID

Cancel   Back   Next

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

Specify export file.
Select export file and file format.

Export File	Export - PartnersPriceLIst.txt Browse...
Field Separator	Comma (,) ▾
	Comma (,)
	Tab (\t)

Cancel   Back   Next

Select location and format for the export file

Review settings.

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

Property	Value
Action	Export Price Lists
Product	AS064-6061
Price List Items	Range not specified
File name	Export1.txt
Field Separator	Comma (,)

Cancel   Back   Next

Verify settings you have selected.

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

Processing.

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

Processing

Exported:	475
Skipped:	0
Errors:	0

Cancel   Back   Next

**Wizard will start
processing.**

Processing.

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

Processing complete

Exported: 475
Skipped: 0
Errors: 0

Wizard will start processing.

Cancel   Back   Next

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

Completed the Price List Utilities Wizard

If you want to add, copy, update, remove or import additional price lists, please run the wizard once again.

If you have any comments or suggestions, do not hesitate to contact us. Thank you for using the Price List Utilities Wizard.

Run Wizard Again

http://www.dynamics-pros.com

Finish

- 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**
  - **remove price lists**
  - **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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