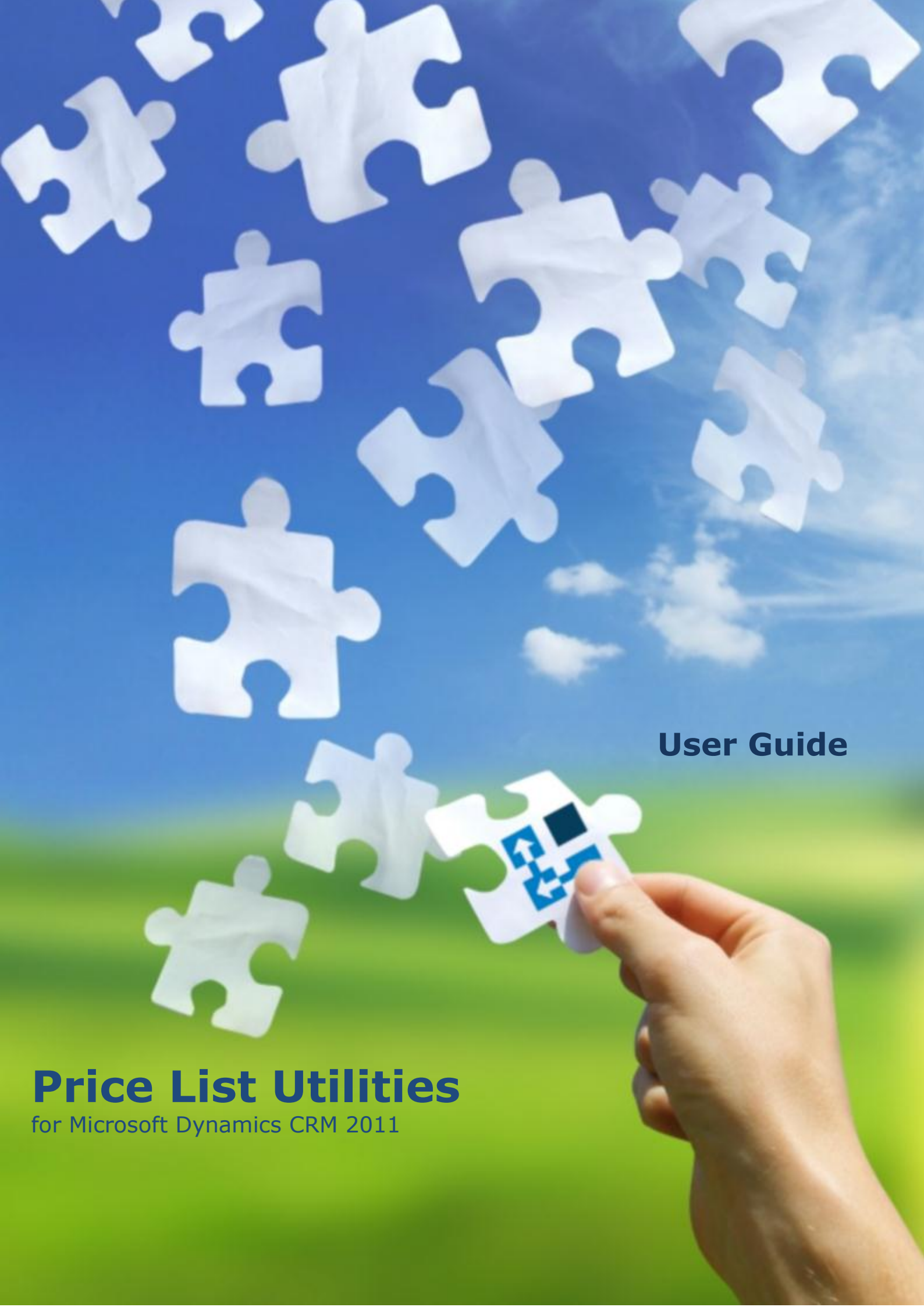

User Guide

Price List Utilities

for Microsoft Dynamics CRM 2011

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What's in this manual

DPS Price List Utilities includes a set of user friendly wizards which will help you to work with the price lists items in Microsoft Dynamics CRM. You will be able to add a new price list items to a range of products, copy the existing price list items from one product to a range of products, update the existing price list information and so on.

This manual is divided into the following chapters:

- ***Getting started with the price list wizards***

  This section will help you to start working with DPS Price List Utilities.

- ***Adding price list items to multiple products***

  This section will guide you through the adding price list items procedure.

- ***Updating price list items for multiple products***

  This section will guide you through the updating price list items procedure.

- ***Copying price list items from one product to other products***

  This section will guide you through the copying price list items procedure.

- ***Removing price list items from multiple products***

  This section will guide you through the removing price list items procedure.

- ***Importing or updating price list items from a file***

  This section will guide you through the importing price list items procedure.

- ***Exporting price list items to a file***

  This section will guide you through the exporting price list items procedure.

Functionality

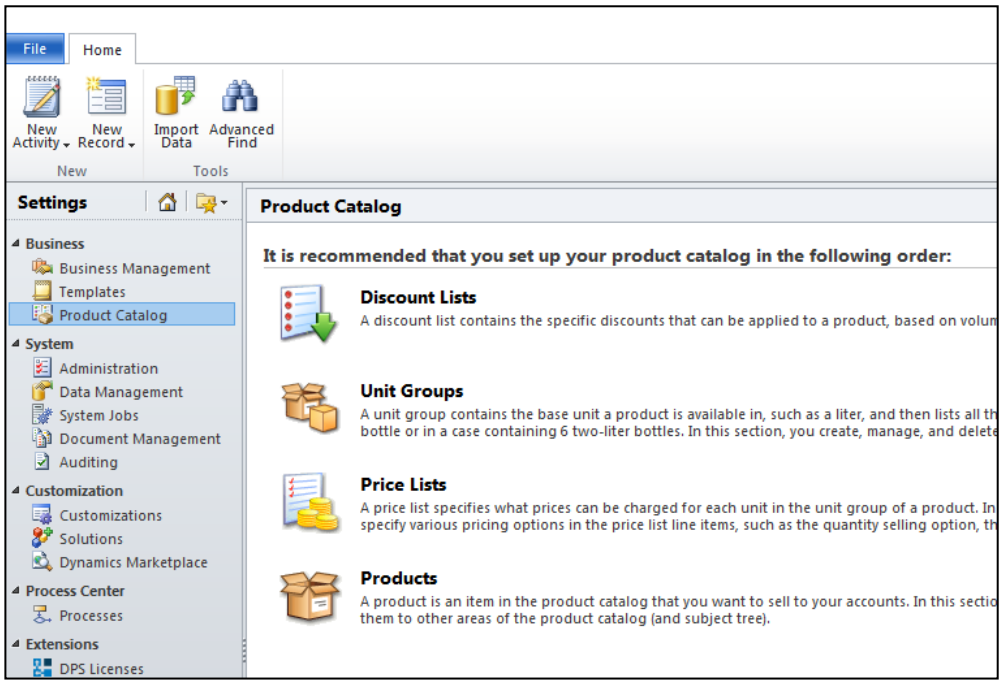
Using the wizards is straightforward, screens are easy to use and self explanatory, but you can refer to this manual for more information when needed.

Chapter 1: Getting started with the price list wizards

To use any of the price list wizards available in the Price List Utilities open the welcome window, navigate to the wizard selection page, and select a procedure you would like to perform. All price list wizard features begin with these steps.

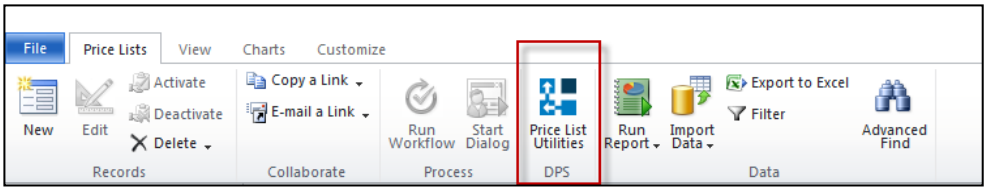
To get started with a price list wizard:

1. Log in to Microsoft Dynamics CRM 2011
2. Price List Utilities can be generally launched from two places:
    a. Select 'Price Lists' in the Product Catalog section in the Settings area



    b. Navigate to Products grid view from any location (for example Sales)

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

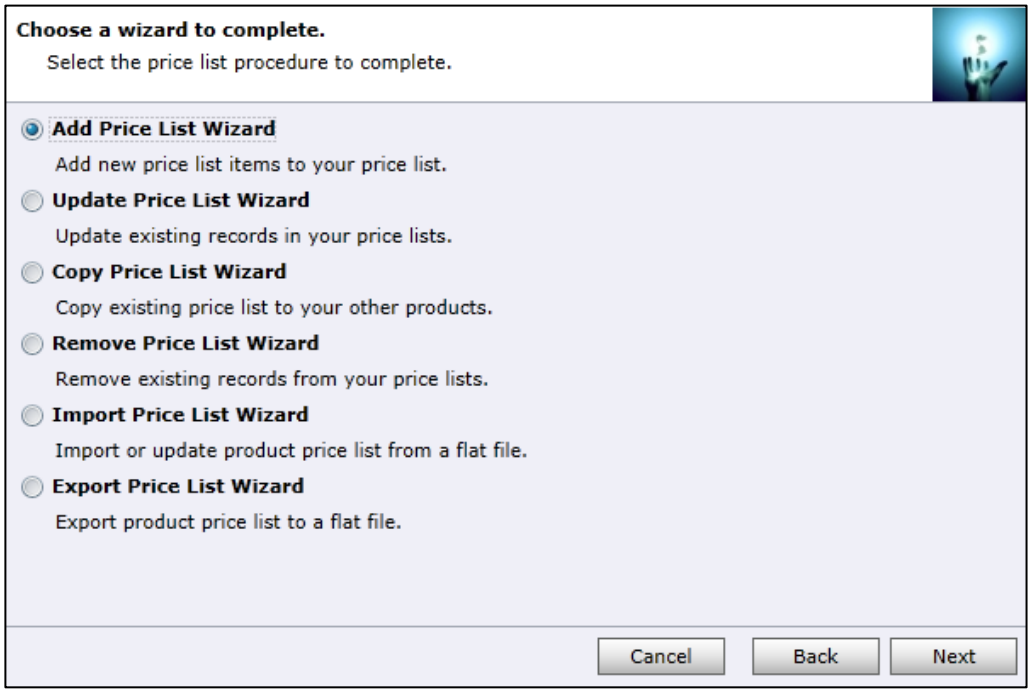


4. Welcome to Price List Utilities 2011

On the Welcome to the Price List Utilities 2011 screen, click "*Next*" button

5. Choose a wizard to complete

Select a procedure you wish to complete. For more information regarding each wizard refer to the appropriate chapter in this manual.



Chapter 2: Adding price list to multiple products

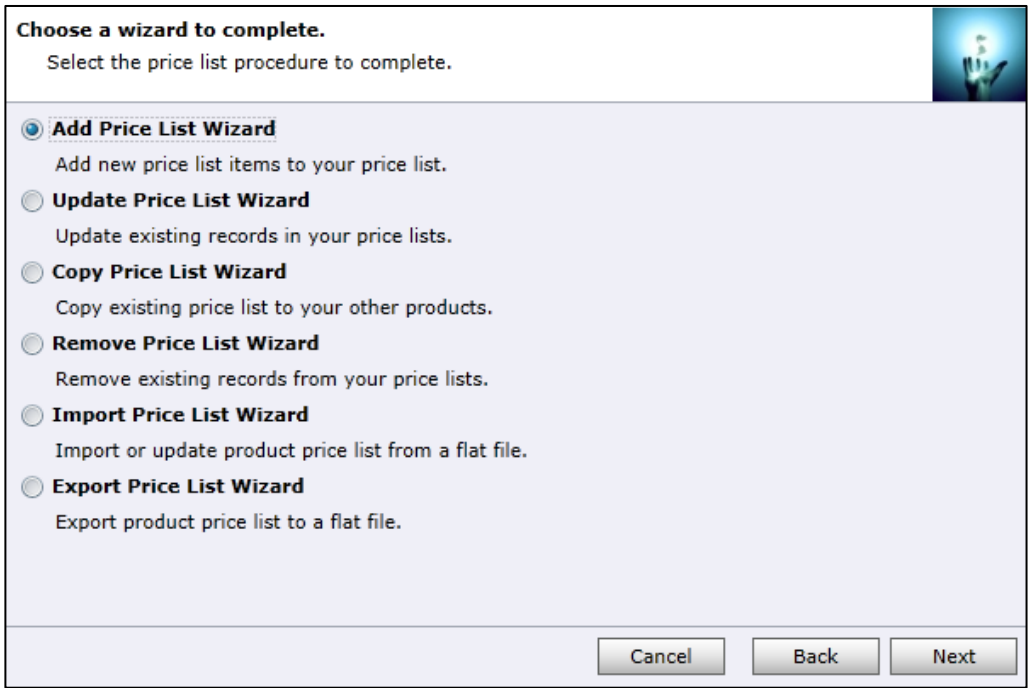
You can use this wizard to add price list item information to multiple products at once.

You can only add price list items to the products which share the same unit group. You will have to run the wizard again if you want to add pricing information to the products with different unit groups.

To add price list items to multiple products:

1. Choose a wizard

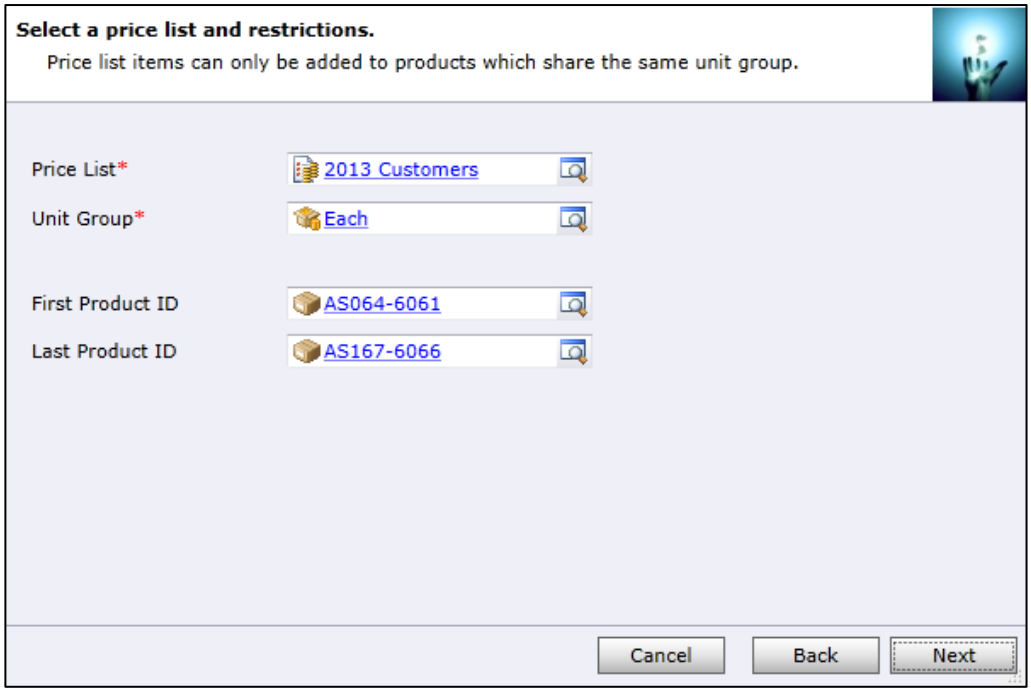
In the "Choose a wizard to complete" screen select the "Add Price List Wizard".



Click "*Next*" to continue.

2. Select price list, unit group and restrictions

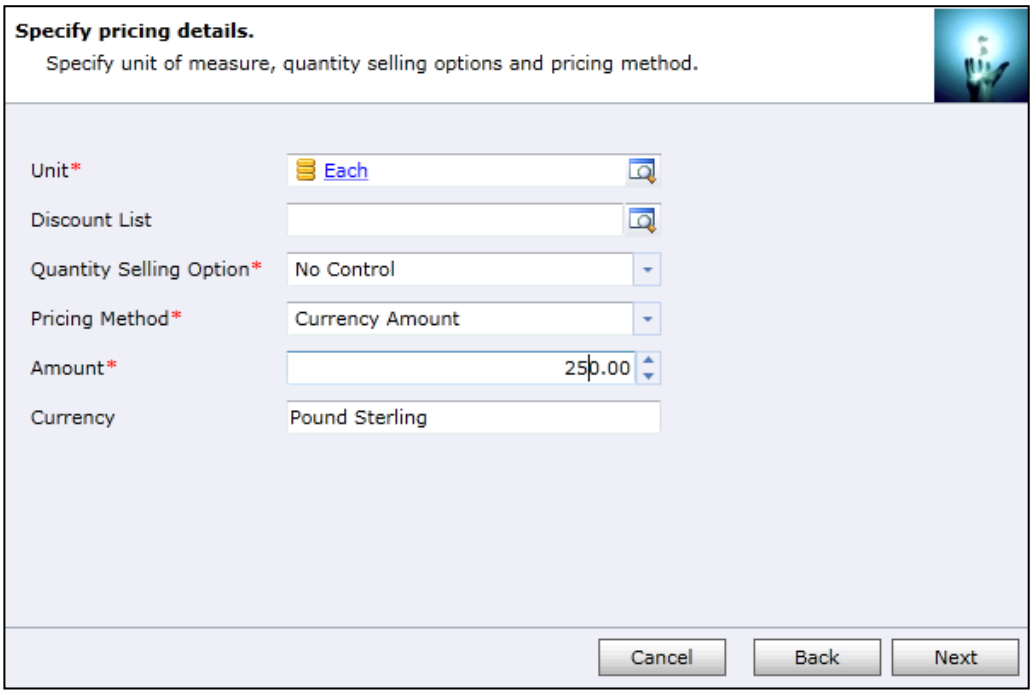
- Select a price list you would like to add.
- Select a unit group.
- Specify products you would like to add price list items to. Products must have the same unit group as specified in the previous step. "From" and/or "To" can be empty. If range is not specified at all it means all products.



Click "*Next*" to continue.

3. Specify pricing details

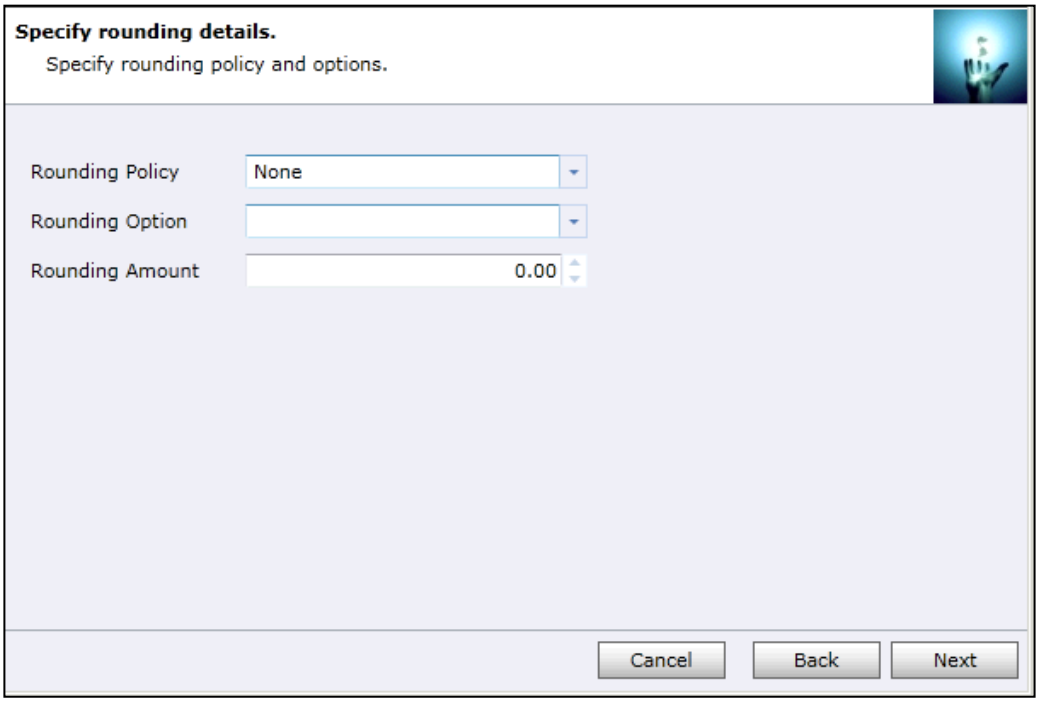
Enter the information how to calculate the default price for the products you are adding the price list items to. Specify a unit of measure, quantity selling options and pricing methods.



Click "*Next*" to continue.

4. Specify rounding details

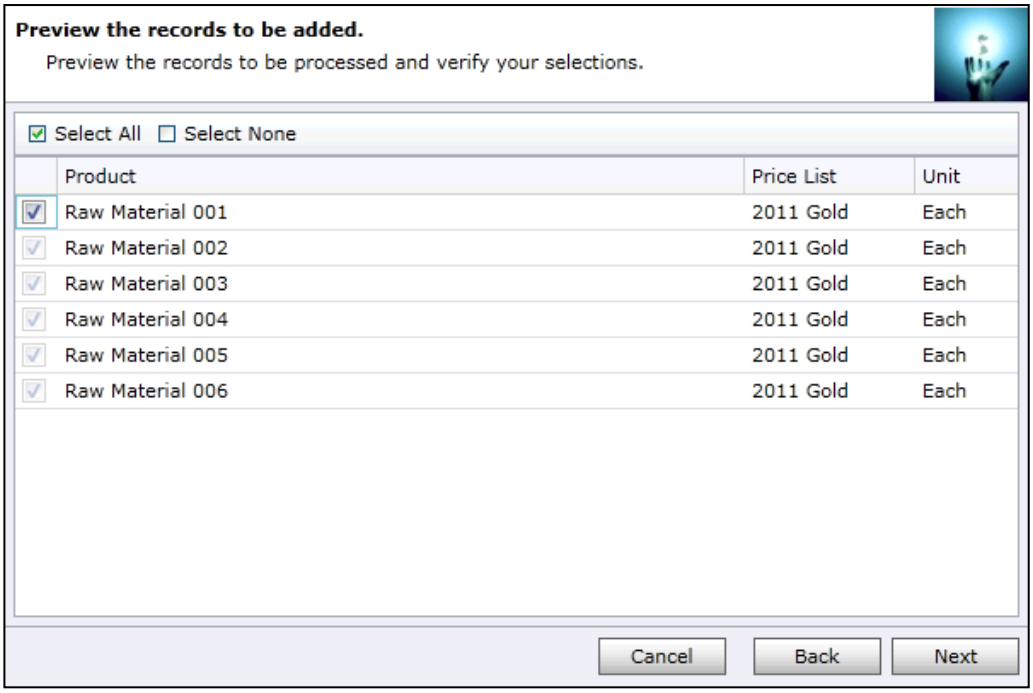
This screen is not available if you have specified Currency Amount as Pricing Method.



Click "*Next*" to continue.

5. Preview the records to be processed

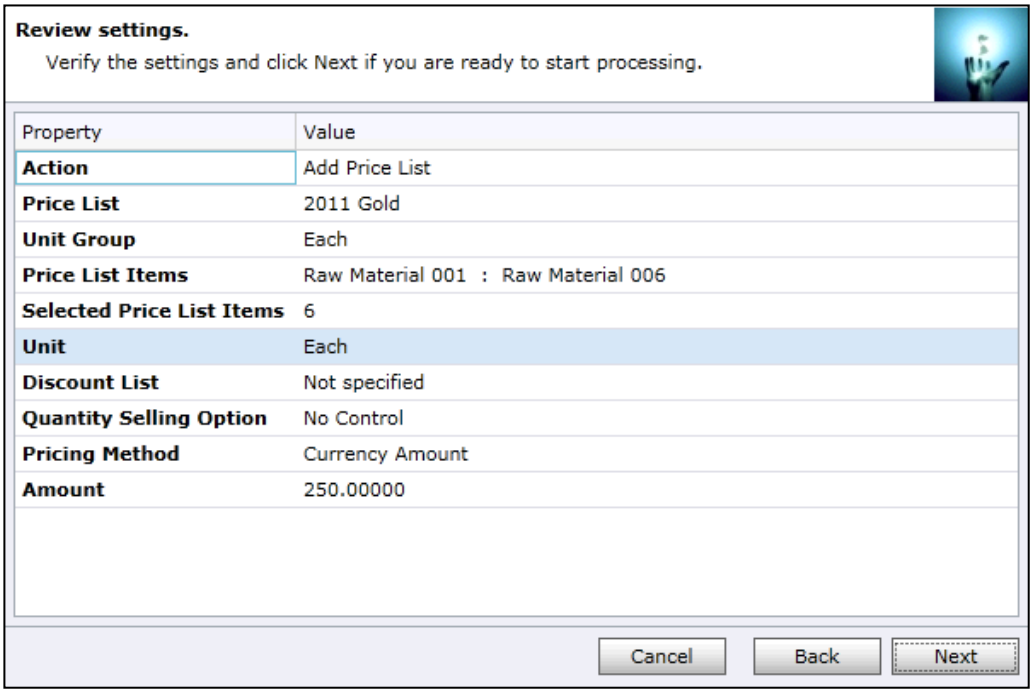
Review the information in the scrolling window. Use "*Back*" button to make any modifications as needed.



Click "*Next*" to continue.

6. Review the settings

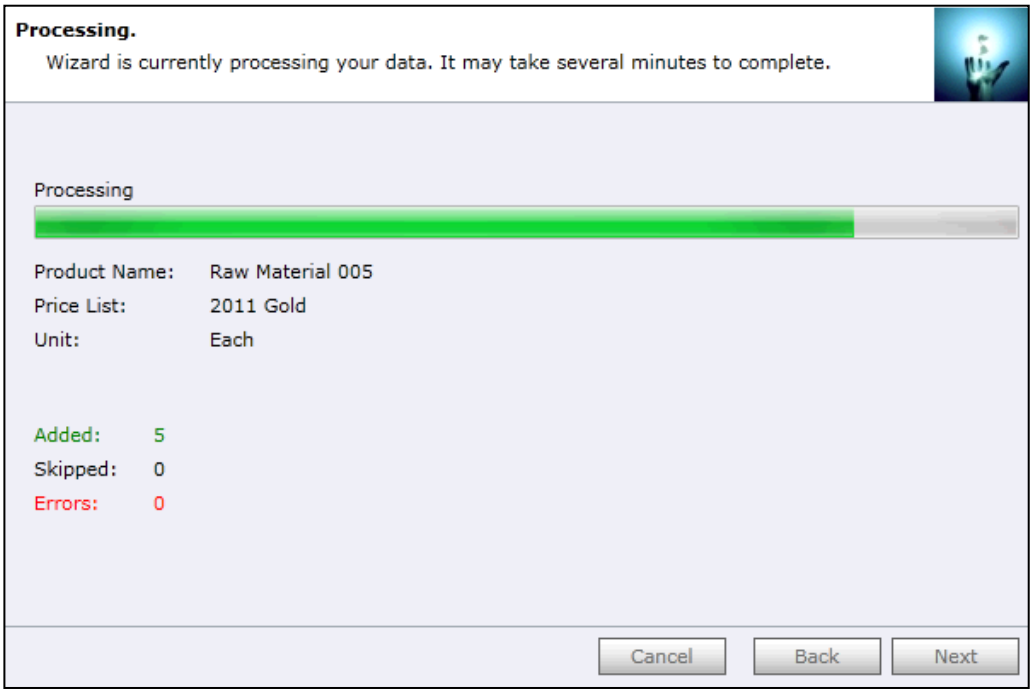
Verify the settings you have selected. Use "*Back*" button if you wish to make any changes.



Click "*Next*" to start adding price list items to the products. Once processing begins it cannot be stopped.

7. Processing

Wizard will start the processing. It may take several minutes to complete.



Click "*Next*" when processing is complete. If there were any errors, "*Show Report*" link will be available to check the details.

8. Completed the Price List Utilities Wizard

You can finish the wizard now or choose to run it again if you want to do some more processing.

Chapter 3: Updating price list items for multiple products

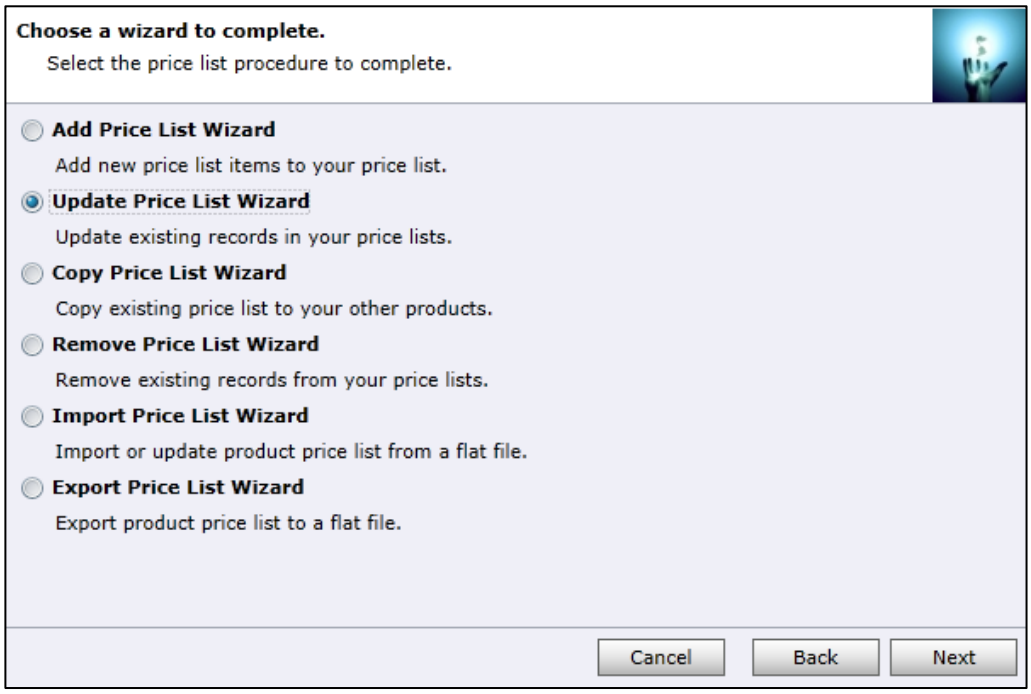
You can use this wizard to update price list item information for multiple products at once.

You can update price list items for the products that share the same price method. You can update several price lists at the same time.

To update a price list items for multiple products:

1. Choose a wizard

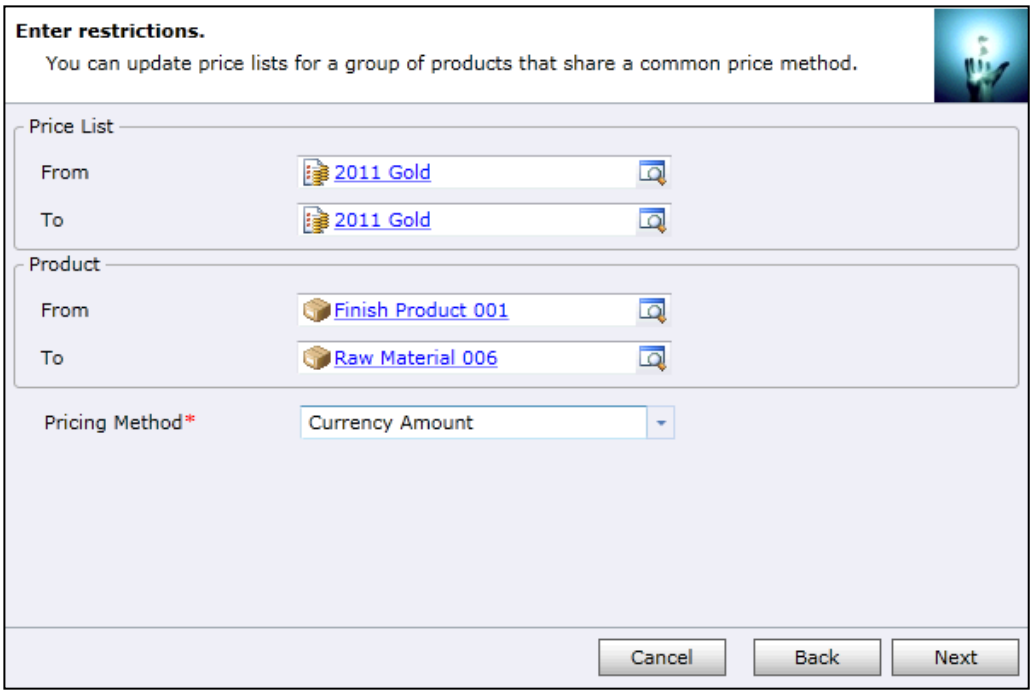
In the "Choose a wizard to complete" screen select the "Update Price List Wizard".



Click "*Next*" to continue.

2. Enter restrictions

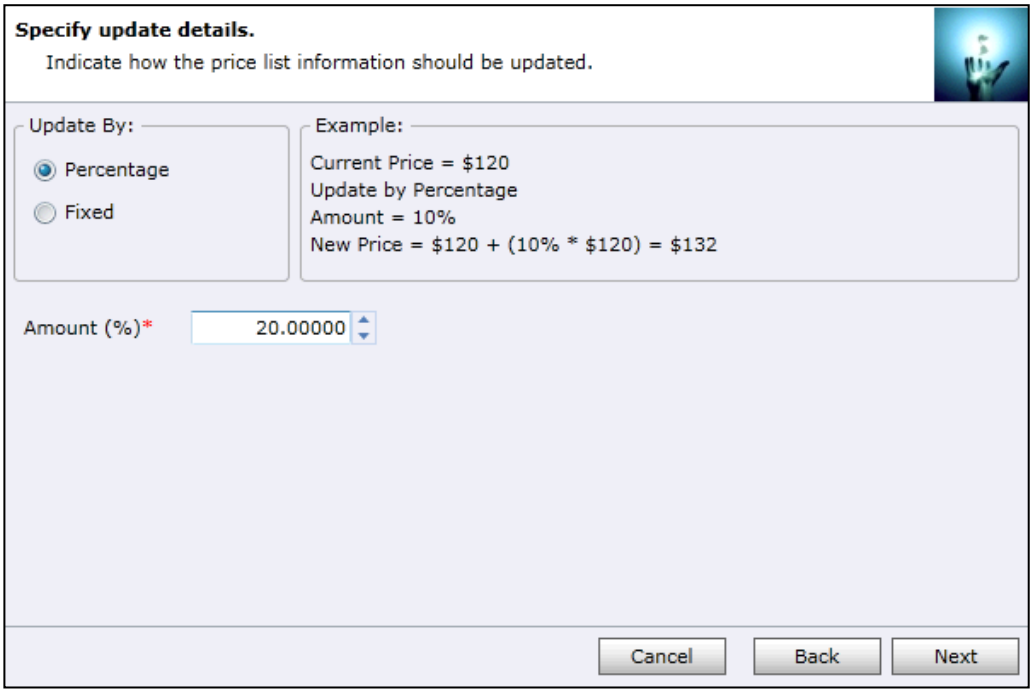
- Specify price lists you would like to update. "From" and/or "To" can be empty. If range is not specified at all it means all price lists.
- Specify products you would like to update price list items for. "From" and/or "To" can be empty. If range is not specified at all it means all products.



Click "*Next*" to continue.

3. Specify update details

Indicate how the price list information should be updated.



Fixed percentages versus percentage
If you are updating price lists that have the price method based on the percentage, e.g. any price method other than Currency Amount, you can specify either a fixed percentage or a percentage change.

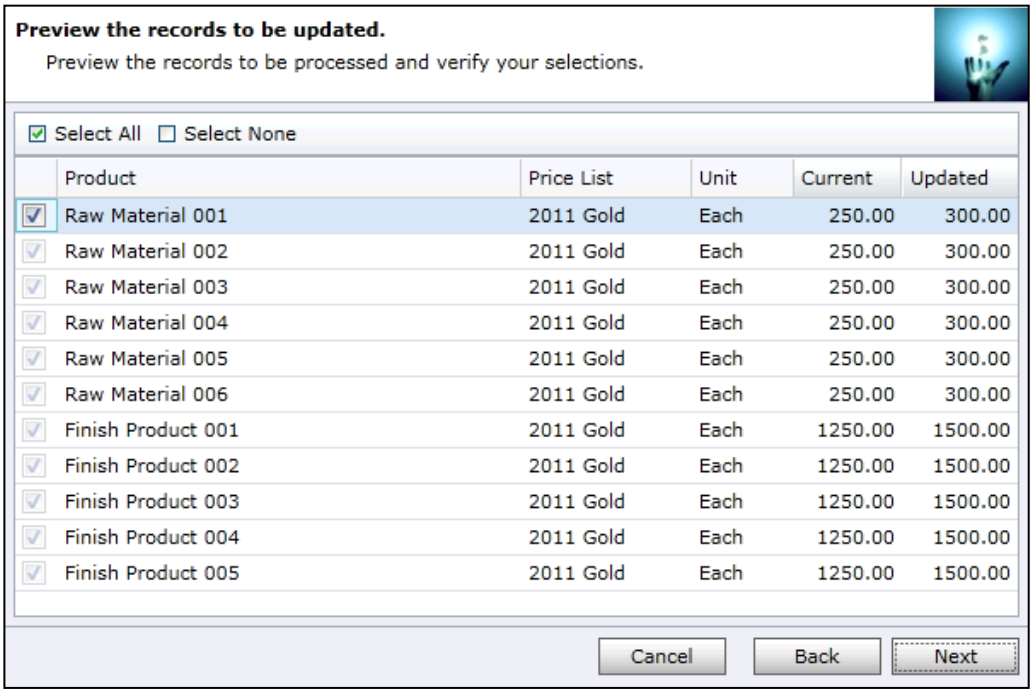
If you use the Fixed Percent update option, the percentage you enter is added to the percentage in each price list.

If you use the Percent update option, the percentage in each price list is multiplied by the percentage you enter, and the result is added to the percentage in each price list.

Click "*Next*" to continue.

4. Preview the records to be processed

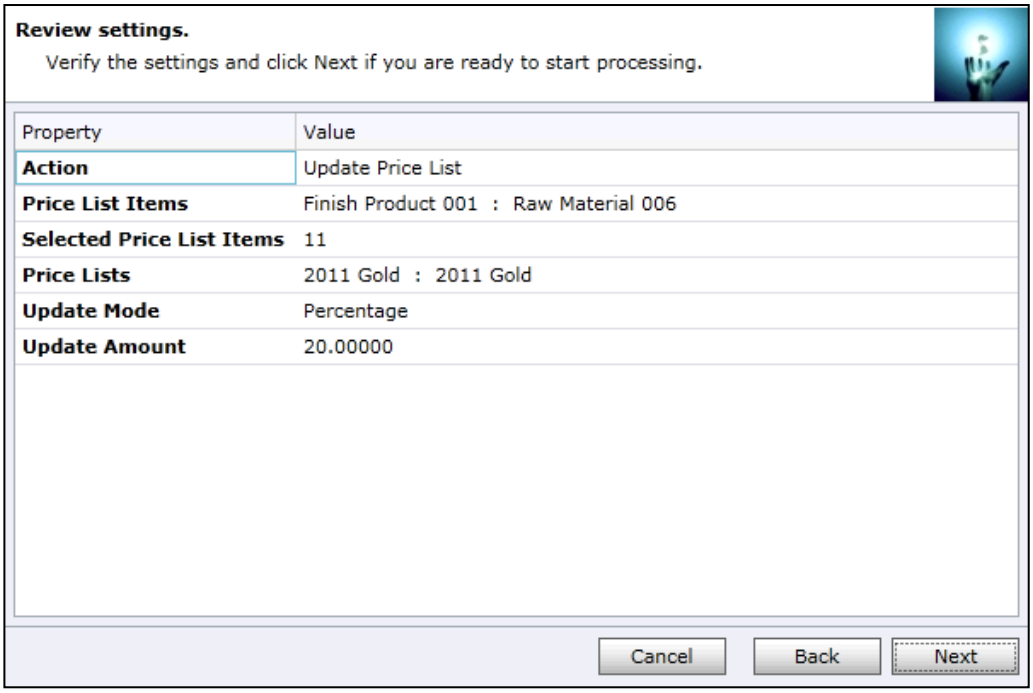
Review the information in the scrolling window. Use "*Back*" button to make any modifications as needed.



Click "*Next*" to continue.

5. Review the settings

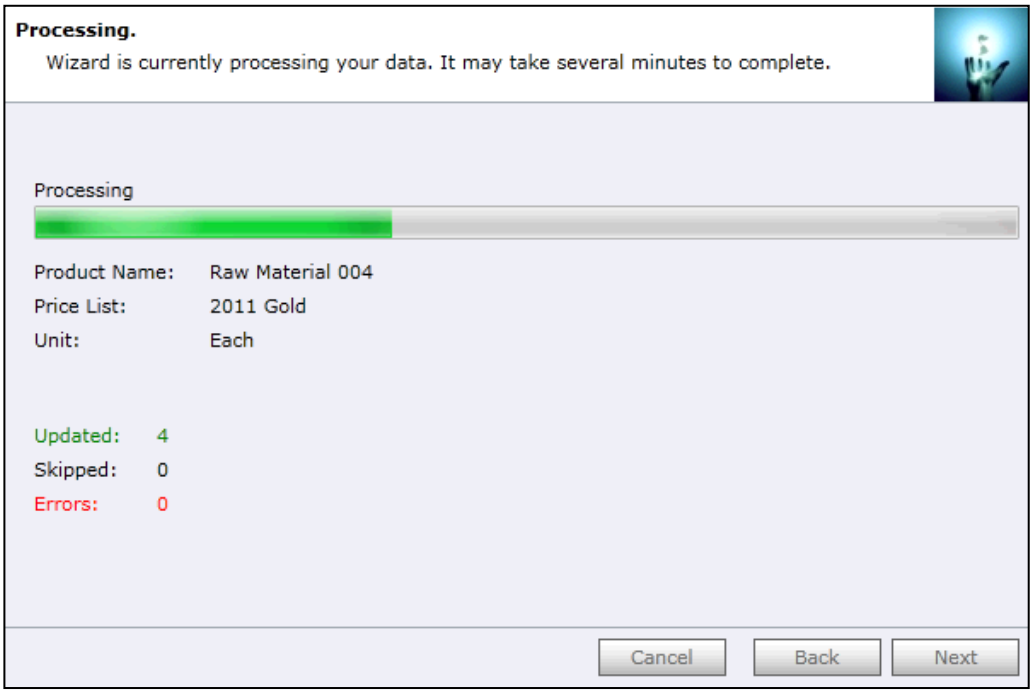
Verify the settings you have selected. Use "*Back*" button if you wish to make any changes.



Click "*Next*" to start updating price list items for the products. Once processing begins it cannot be stopped.

6. Processing

Wizard will start the processing. It may take several minutes to complete.



Click "*Next*" when processing is complete. If there were any errors, "*Show Report*" link will be available to check the details.

7. Completed the Price List Utilities Wizard

You can finish the wizard now or choose to run it again if you want to do some more processing.

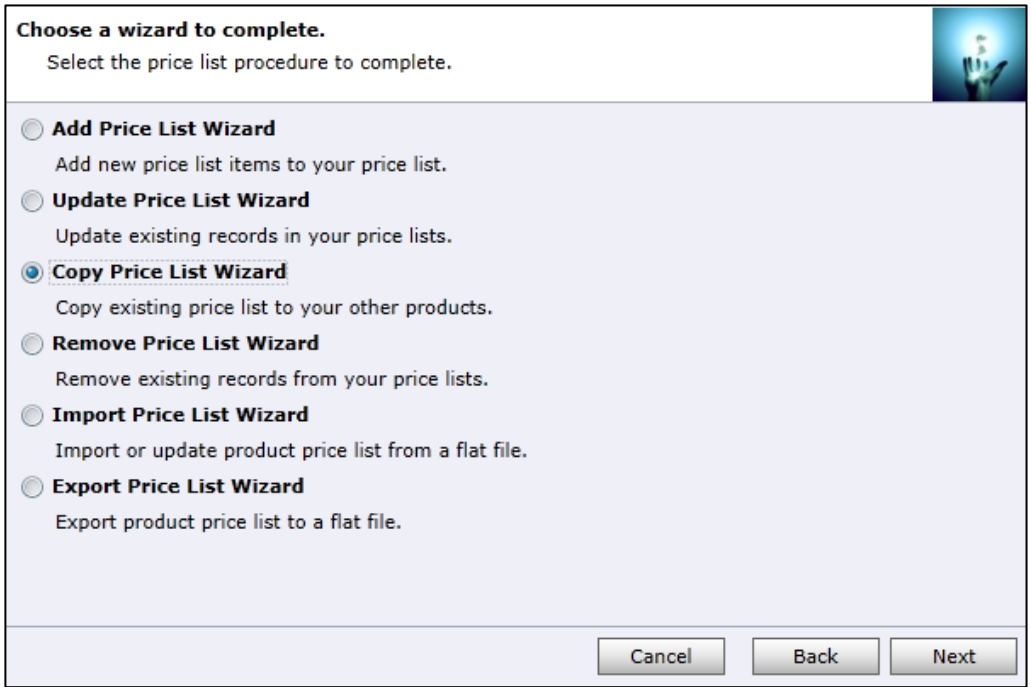
Chapter 4: Copying price list items from one product to other products

You can use this wizard to copy price list item information from one product (selected template product) to multiple products at once.

To copy price list items to multiple products:

1. Choose a wizard

In the "Choose a wizard to complete" screen select the "Copy Price List Wizard".



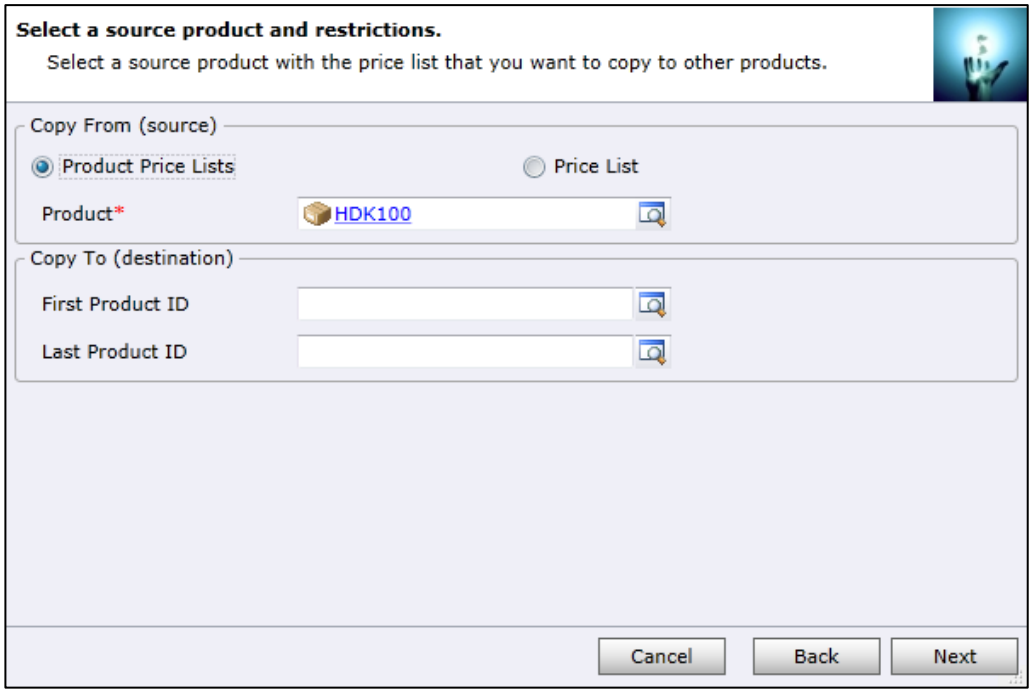
Click "*Next*" to continue.

2. Select source product and restrictions

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

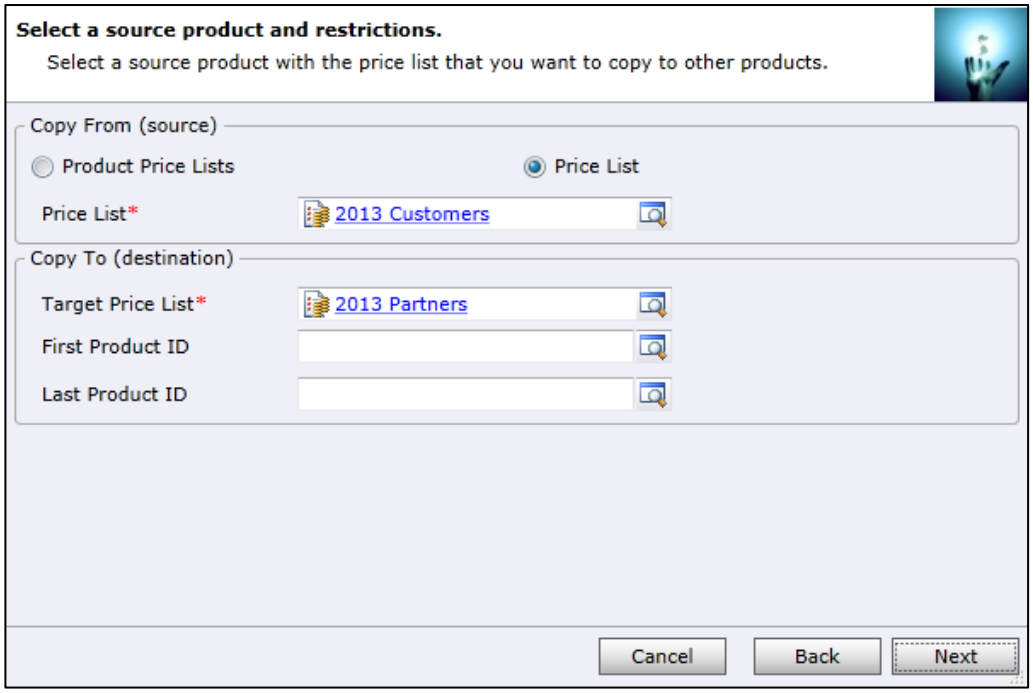
When coping from Product Price List:

- Select a source product you want to copy price list information from. This is the product which pricing information will be used as a template.
- Specify products you would like to copy price list items to. "From" and/or "To" can be empty. If range is not specified at all it means all products.



When coping from Price List:

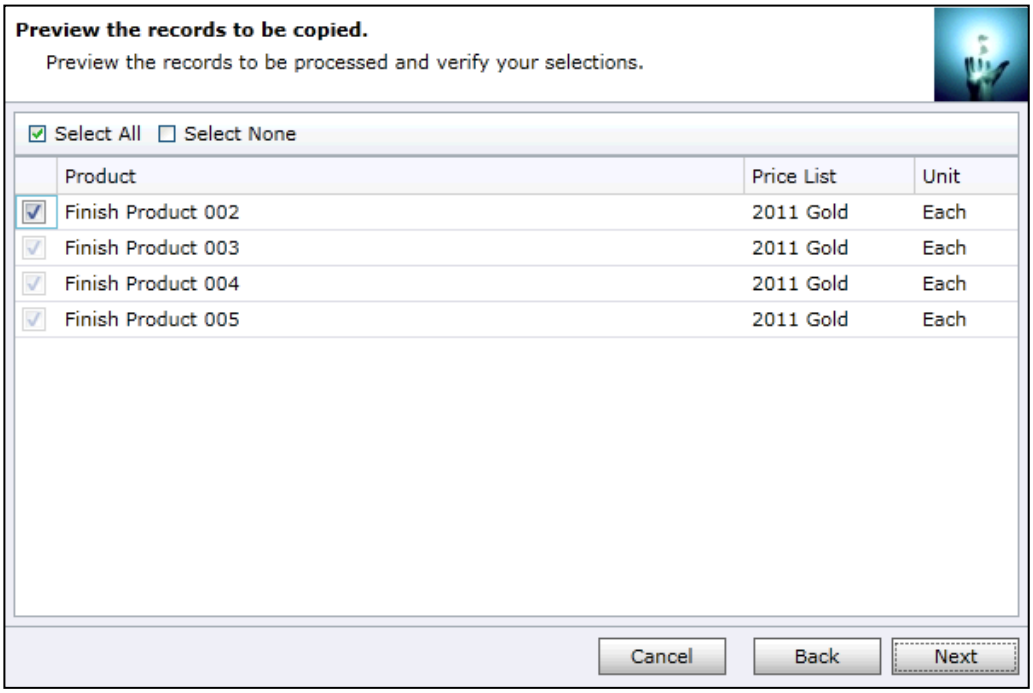
- Select a source Price List you want to copy price list information from. This is the Price List which pricing information will be used as a template.
- Specify target Price List you would like to copy price list items to.
- Optionally limit products you want to include in target price list.



Click "*Next*" to continue.

3. Preview the records to be processed

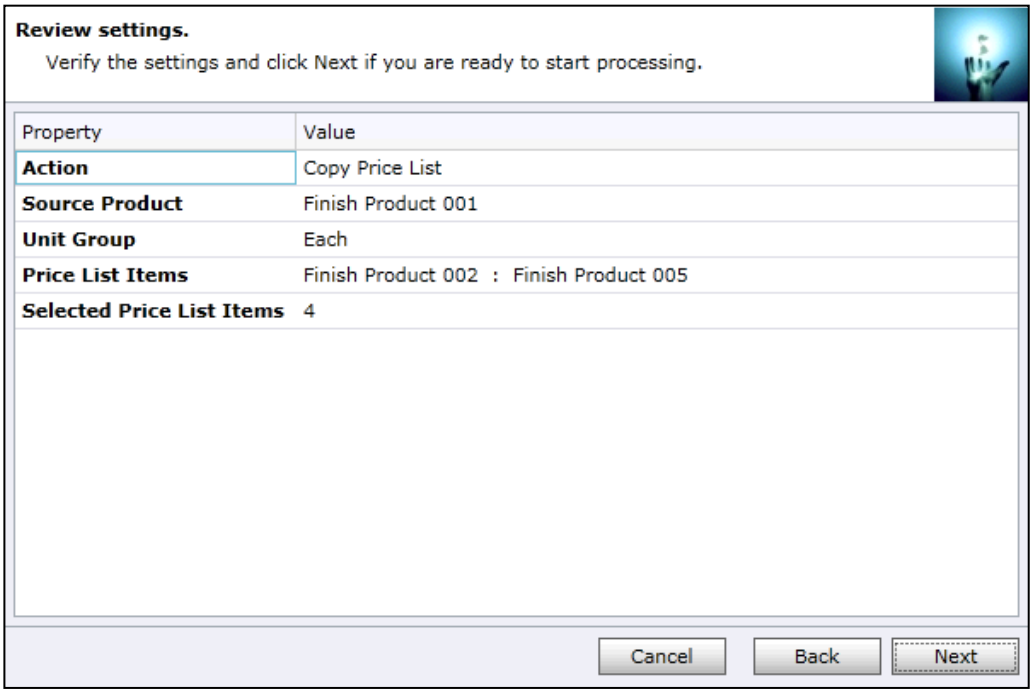
Review the information in the scrolling window. Use "*Back*" button to make any modifications as needed.



Click "*Next*" to continue.

4. Review the settings

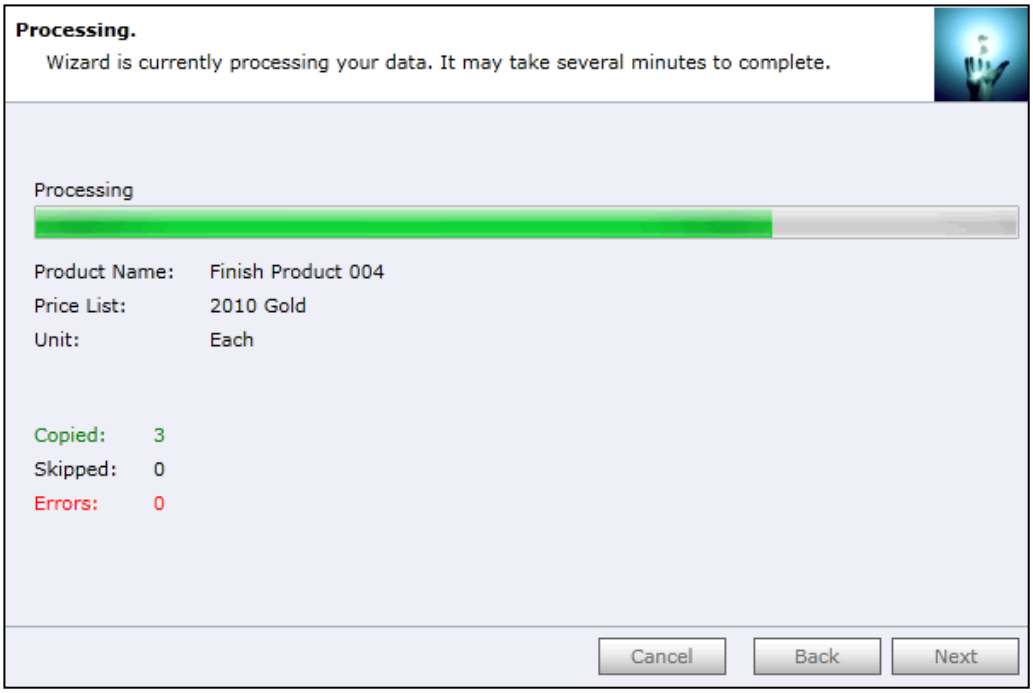
Verify the settings you have selected. Use "*Back*" button if you wish to make any changes.



Click "*Next*" to start copying price list items to the products. Once processing begins it cannot be stopped.

5. Processing

Wizard will start the processing. It may take several minutes to complete.



Click "*Next*" when processing is complete. If there were any errors, "*Show Report*" link will be available to check the details.

6. Completed the Price List Utilities Wizard

You can finish the wizard now or choose to run it again if you want to do some more processing.

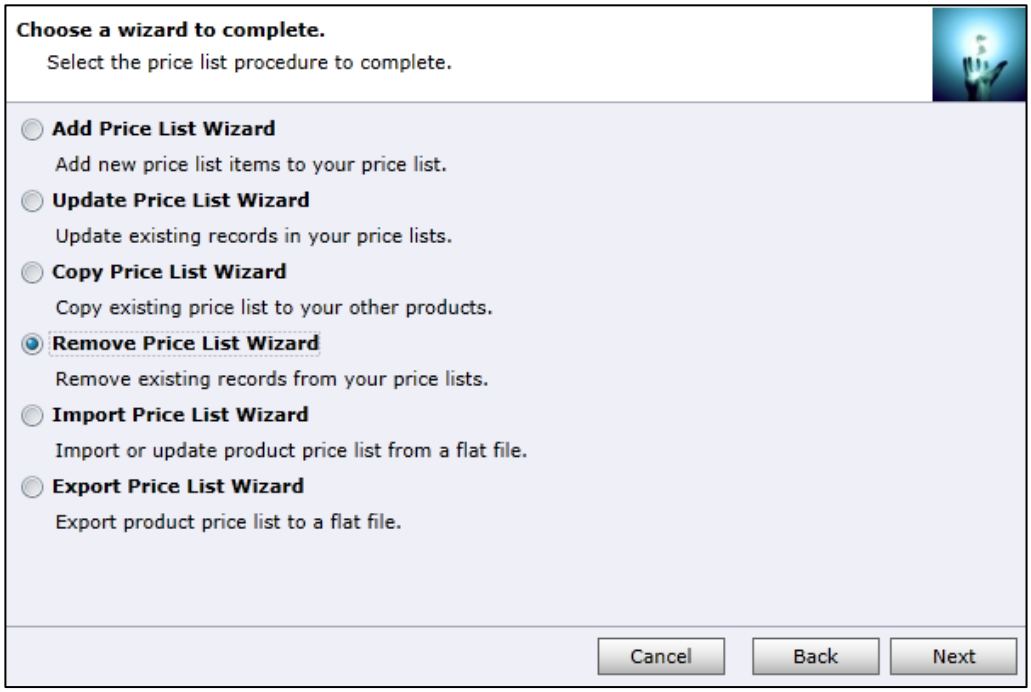
Chapter 5: Removing price list items from multiple products

You can use this wizard to remove price list item information from multiple products at once.

To remove price list items from multiple products:

1. Choose a wizard

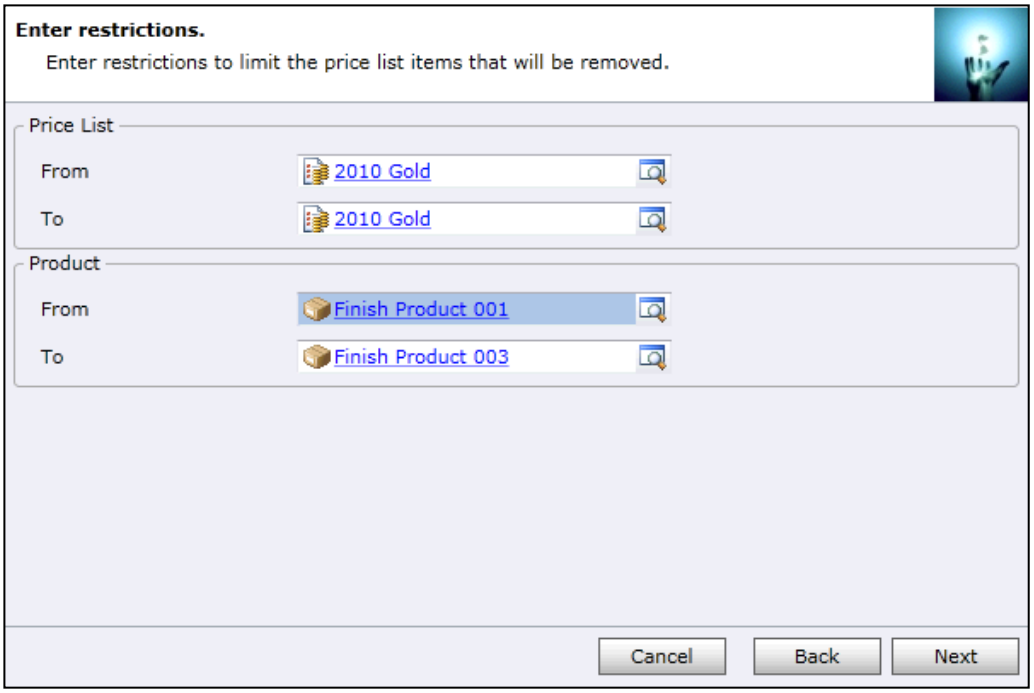
In the "Choose a wizard to complete" screen select the "Remove Price List Wizard".



Click "*Next*" to continue.

2. Enter Restrictions

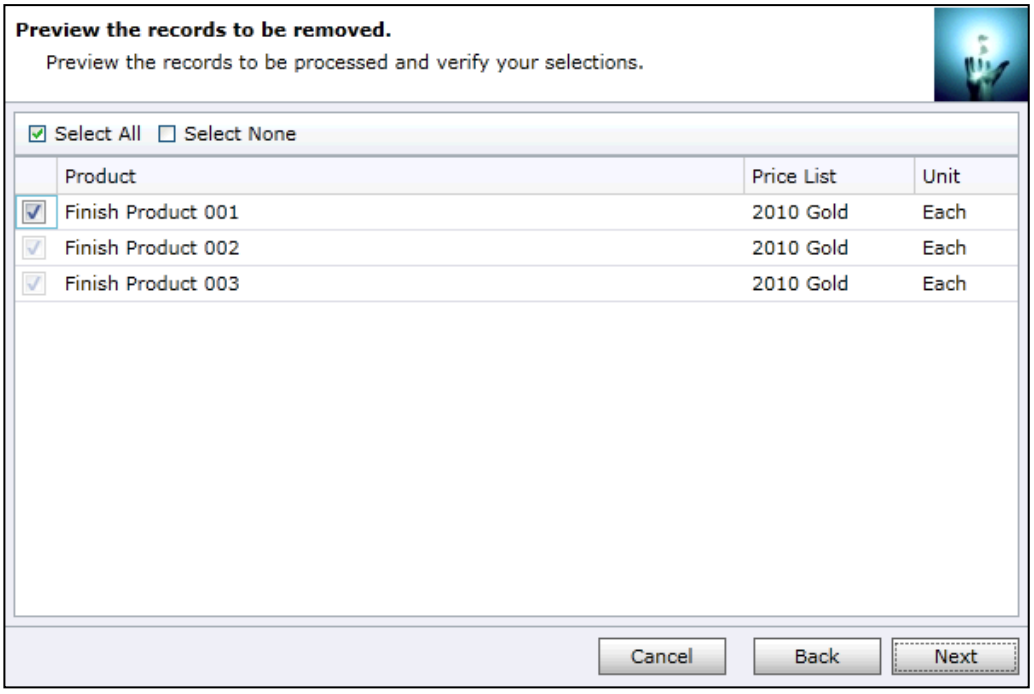
- Specify price lists you would like to remove. "From" and/or "To" can be empty. If range is not specified at all it means all price lists.
- Specify products you would like to remove price list items from. "From" and/or "To" can be empty. If range is not specified at all it means all products.



Click "*Next*" to continue.

3. Preview the records to be processed

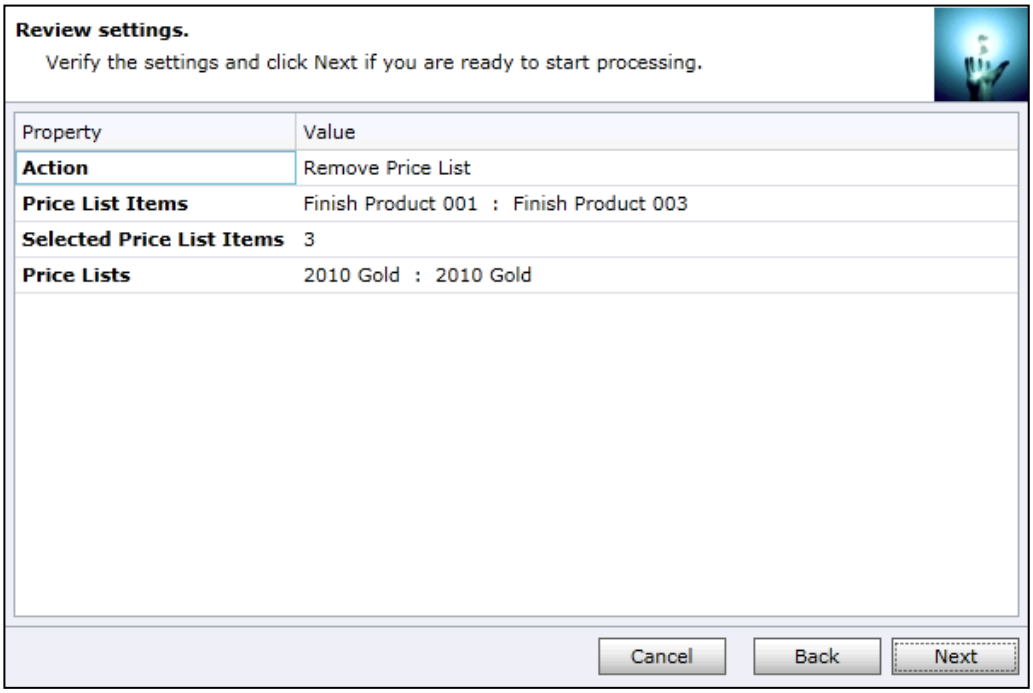
Review the information in the scrolling window. Use "*Back*" button to make any modifications as needed.



Click "*Next*" to continue.

4. Review the settings

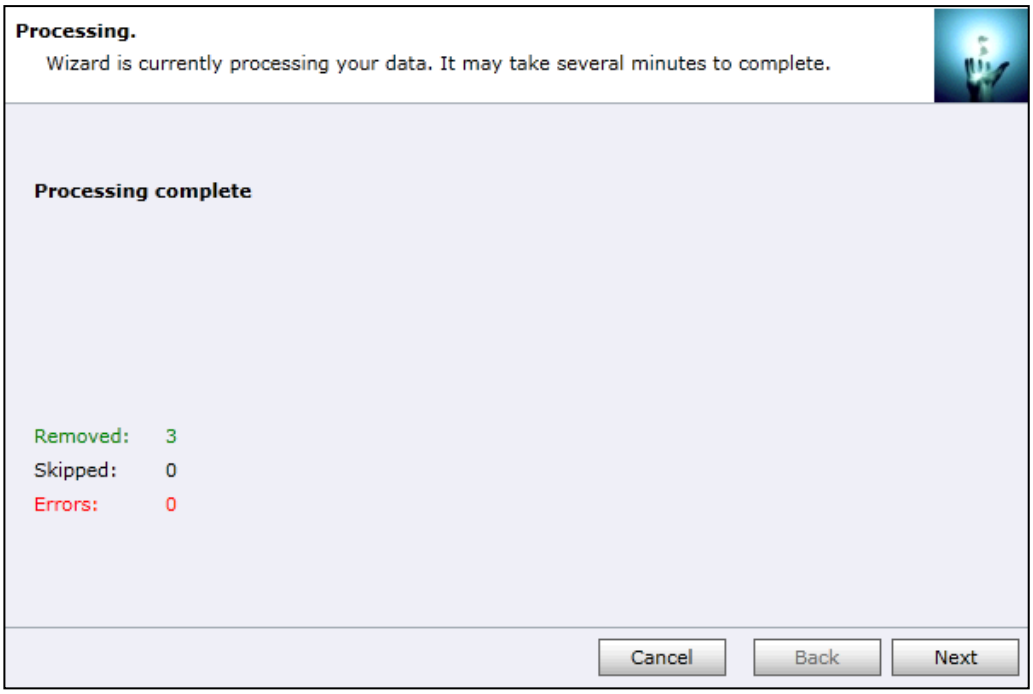
Verify the settings you have selected. Use "*Back*" button if you wish to make any changes.



Click "*Next*" to start removing price list items from the products. Once processing begins it cannot be stopped.

5. Processing

Wizard will start the processing. It may take several minutes to complete.



Click "*Next*" when processing is complete. If there were any errors, "*Show Report*" link will be available to check the details.

6. Completed the Price List Utilities Wizard

You can finish the wizard now or choose to run it again if you want to do some more processing.

Chapter 6: Importing or updating price list items from a file

You can use this wizard to import or update price list items information from a file.

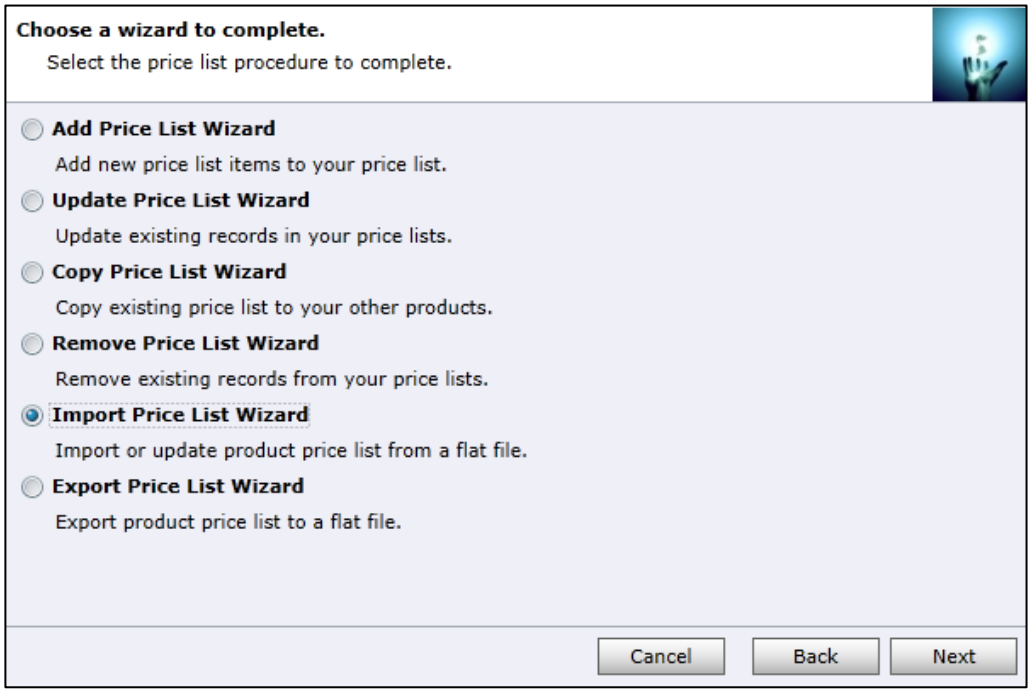
Requirements for the successful import or update:

- Price List, Unit, Discount List and Product in your file must exist in the Dynamics CRM
- Pricing Method and Rounding Option in your file must be exactly as in the Dynamics CRM
- Import Wizard is using Product – Price List – Unit combination to decide which operation will be performed. Combination that does not exist in the CRM will be imported; existing records will be updated.

To import or update price list items from a file:

1. Choose a wizard

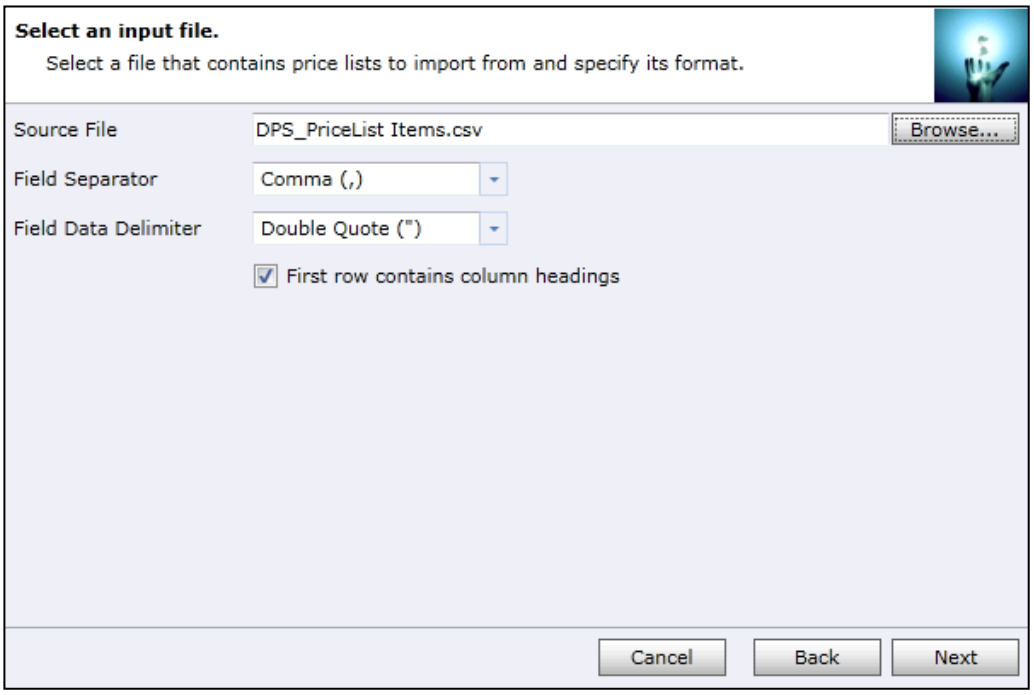
In the "Choose a wizard to complete" screen select the "Import Price List Wizard".



Click "*Next*" to continue.

2. Select an input file

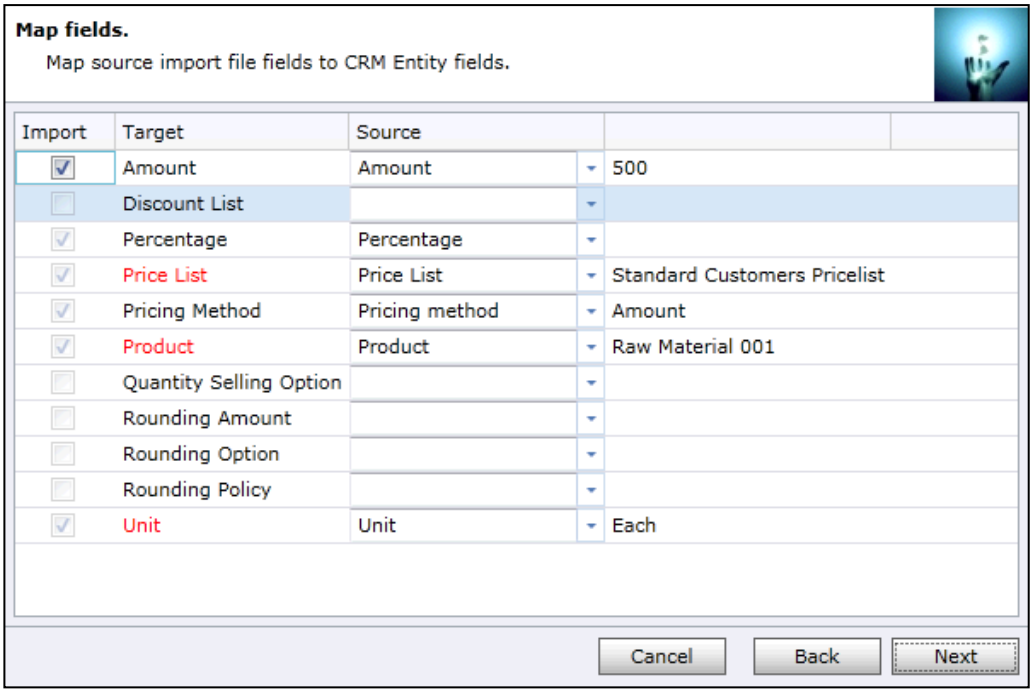
- Select a file that contains pricing information you wish to import. Make sure that Field Separator and Filed Data Delimiter fields are correctly selected.
- Specify whether your file contains a header.



Click "*Next*" to continue.

3. Map fields

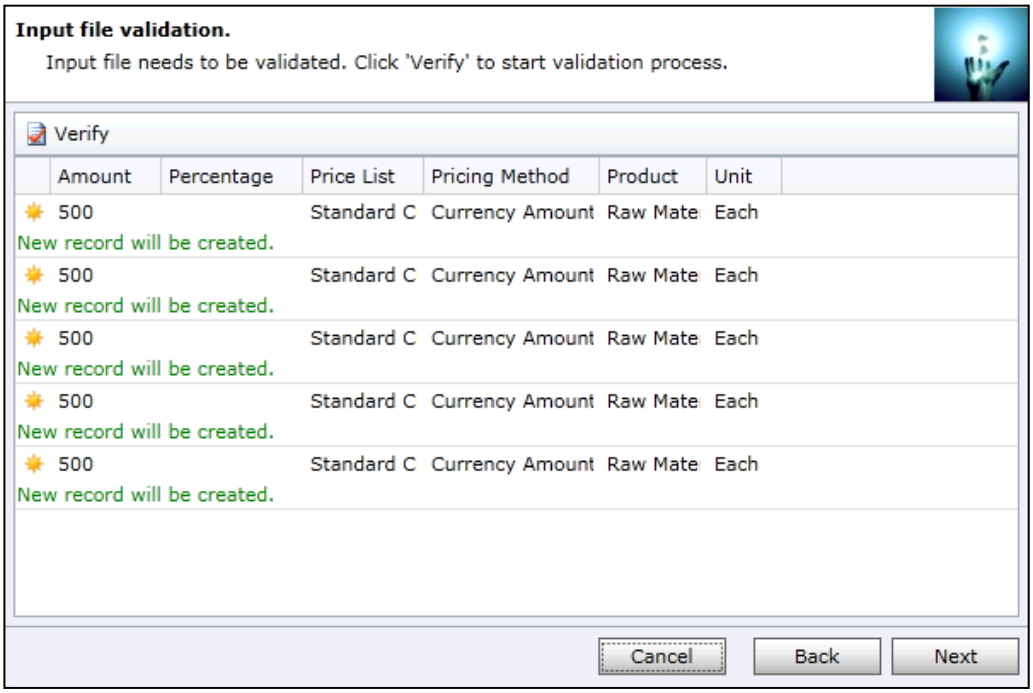
Map Dynamics CRM fields to fields in the input file. Fields marked in red colour are the key fields used to identify whether to create or update the price list items.



Click "*Next*" to continue.

4. Input file validation

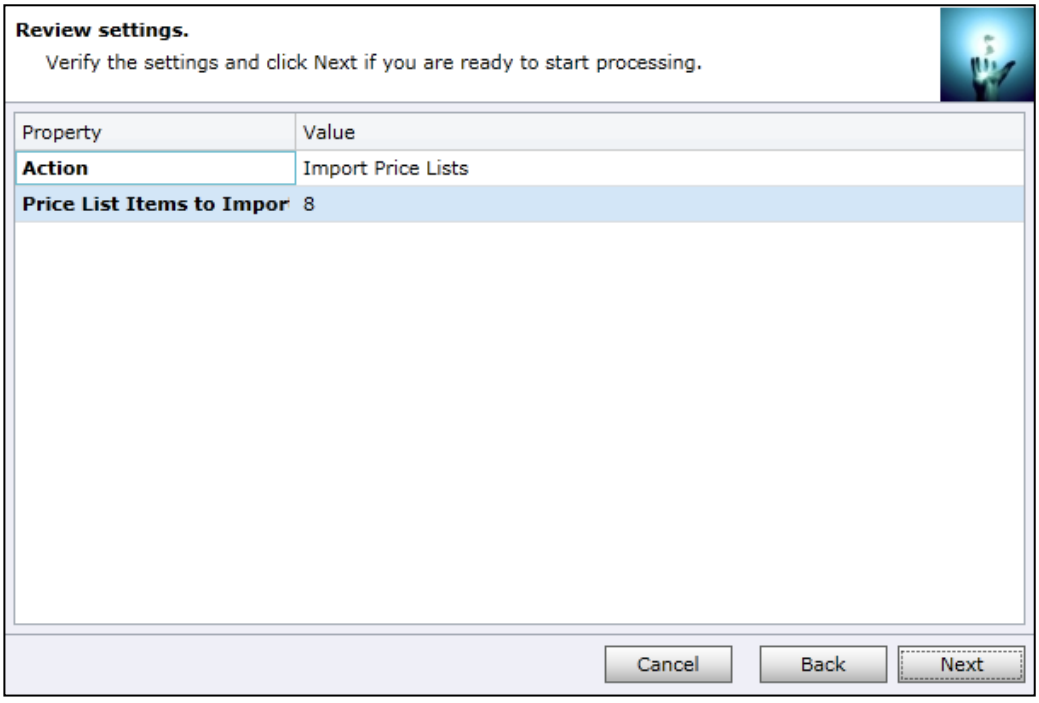
Use verify button to validate the input file. You will not be able to continue if there are any errors.



Click "*Next*" to continue.

5. Review the settings

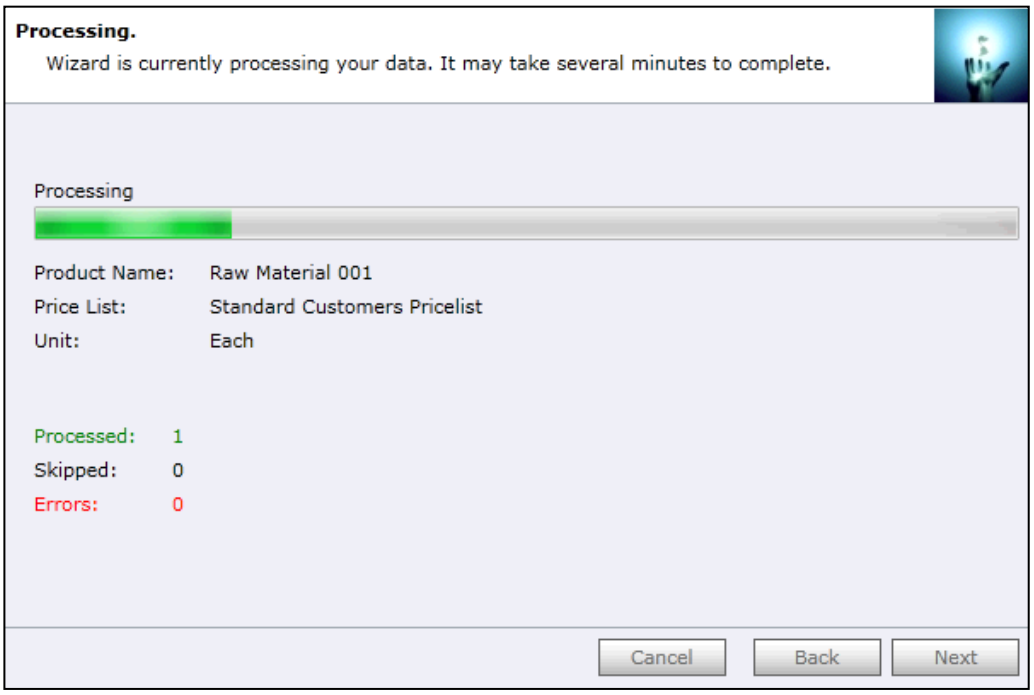
Verify the settings you have selected. Use "*Back*" button if you wish to make any changes.



Click "*Next*" to start importing price list items. Once processing begins it cannot be stopped.

6. Processing

Wizard will start the processing. It may take several minutes to complete.



Click "*Next*" when processing is complete. If there were any errors, "*Show Report*" link will be available to check the details.

7. Completed the Price List Utilities Wizard

You can finish the wizard now or choose to run it again if you want to do some more processing.

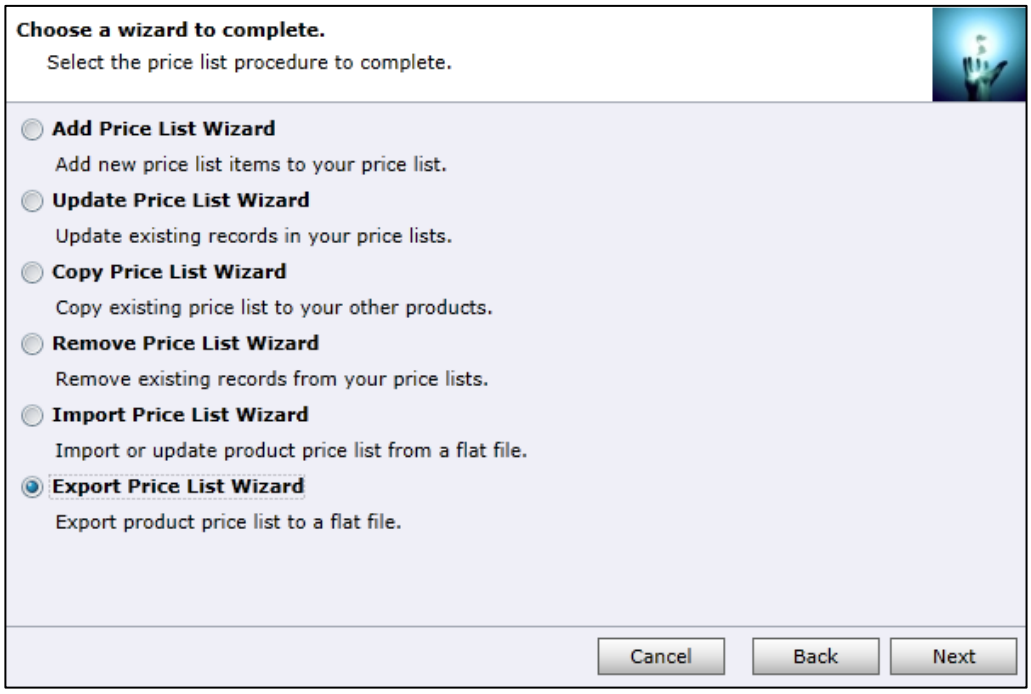
Chapter 7: Exporting price list items from a file

You can use this wizard to export price list items to a file which can be used later as a source for import

To export price list items to a file:

1. Choose a wizard

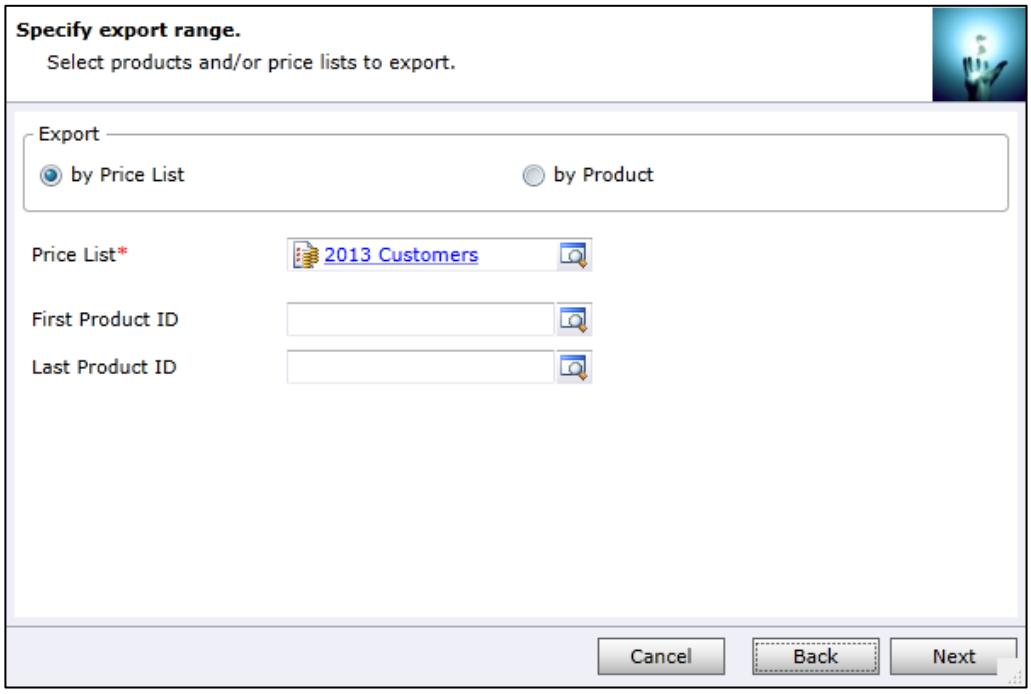
In the "Choose a wizard to complete" screen select the "Export Price List Wizard".



Click "*Next*" to continue.

1. Specify export range

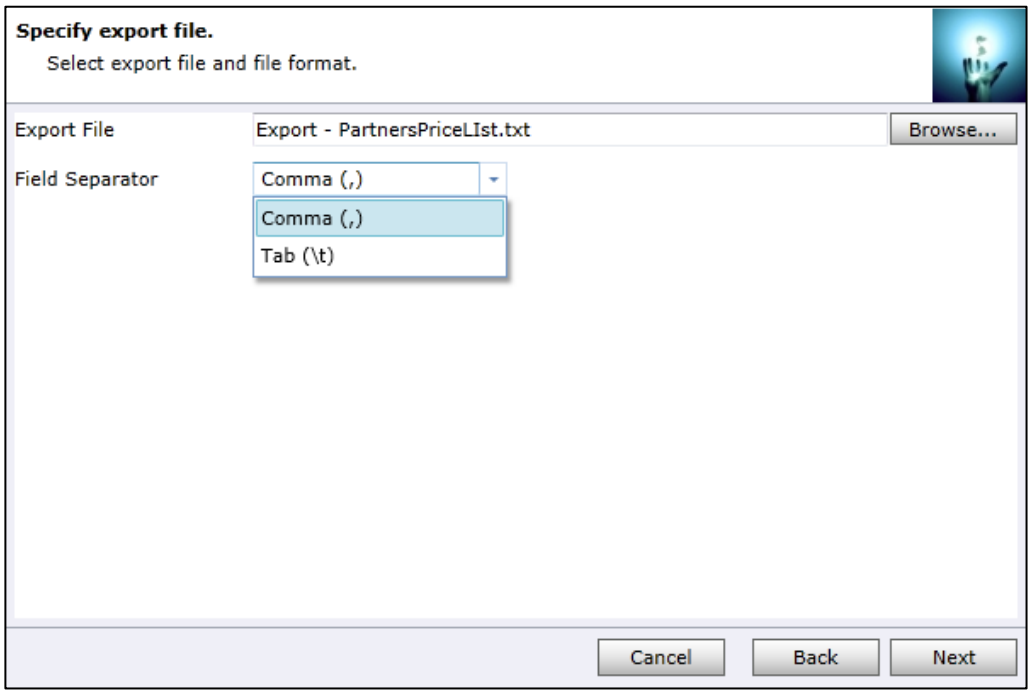
In the "Specify export range" screen select how you want to identify records to export. Choose to export by Price List or by Product.



Click "Next" to continue.

2. Specify export file.

In the "Specify export file" screen select location and format for the export file.

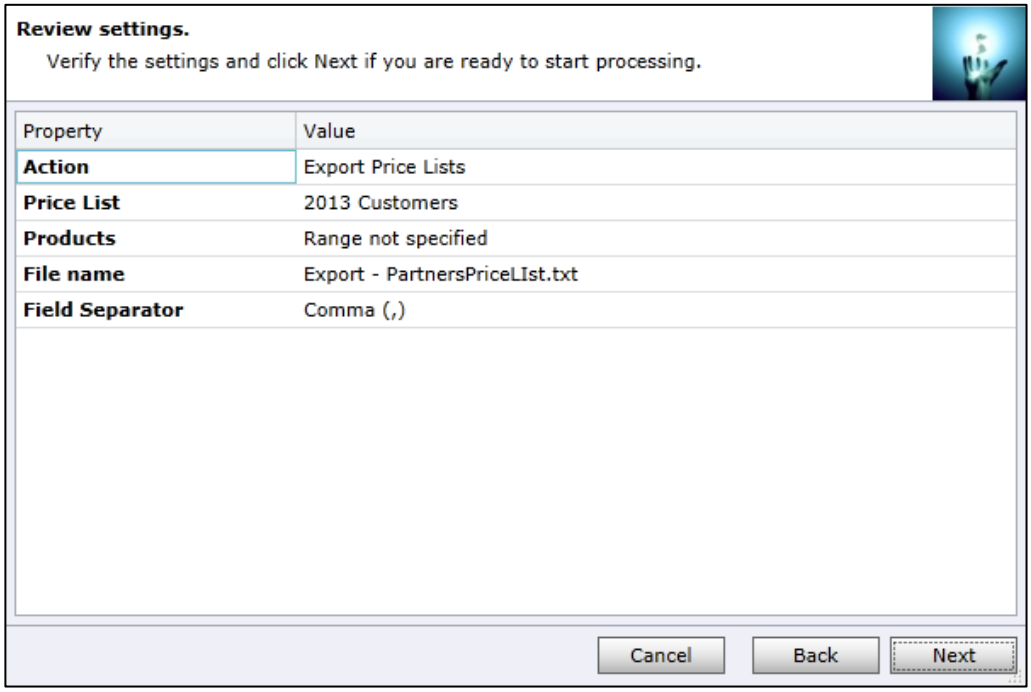


Click "Next" to continue.

3. Review settings.

In the "Review settings" screen verify settings you have selected.

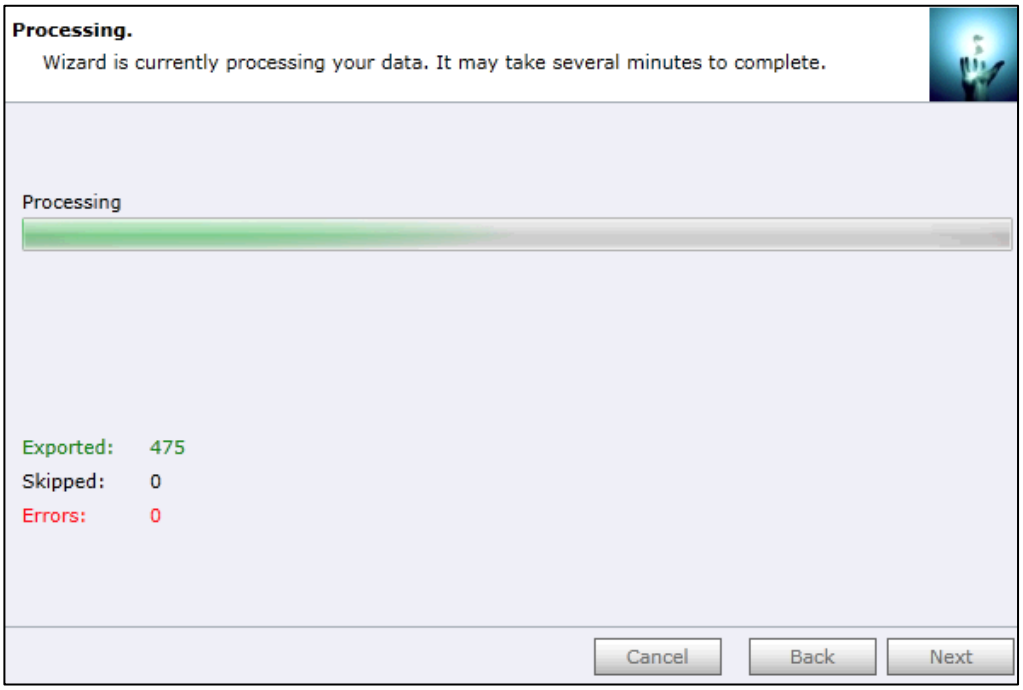
Use "Back" button if you wish to make any changes



Click "Next" to continue.

4. Processing

Wizard will start the processing. It may take several minutes to complete.



Click "*Next*" when processing is complete. If there were any errors, "*Show Report*" link will be available to check the details.

5. Completed the Price List Utilities Wizard

You can finish the wizard now or choose to run it again if you want to do some more processing.

Support

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

http://support.dynamics-pros.com

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