

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

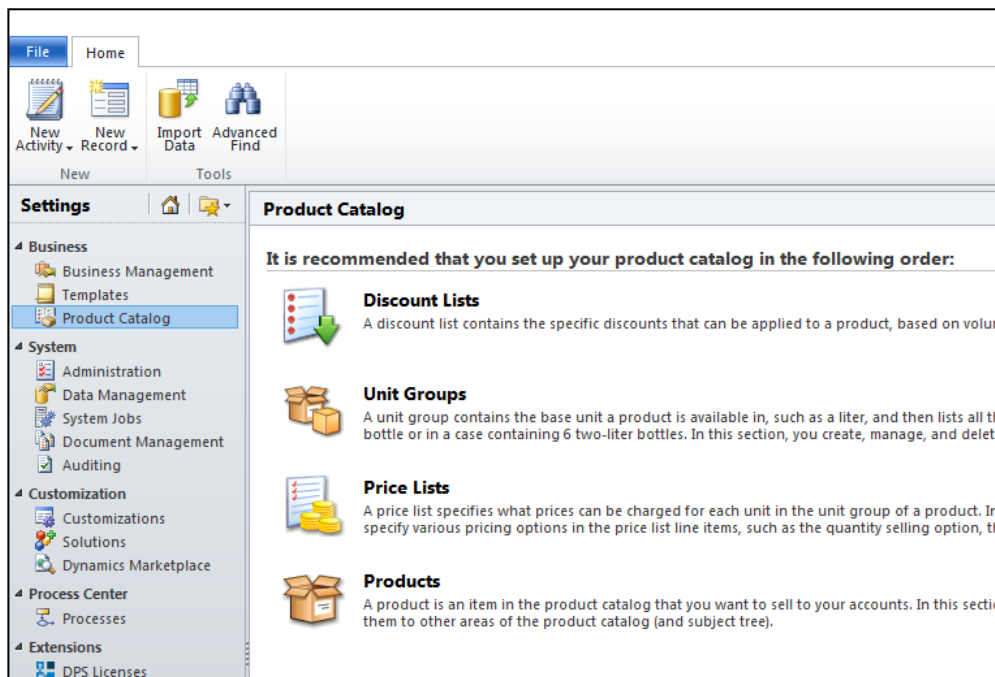
Using the wizards is straightforward, screens are easy to use and self explanatory, but you can refer to this manual for more information when needed.

Chapter 1: Getting started with the price list wizards

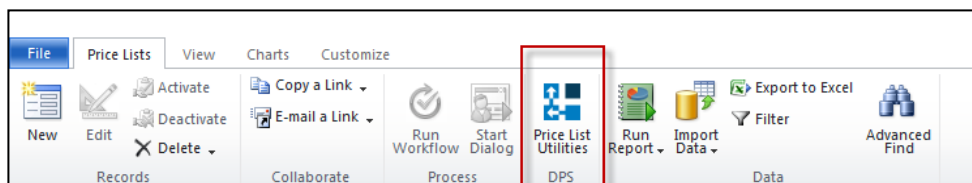
To use any of the price list wizards available in the Price List Utilities open the welcome window, navigate to the wizard selection page, and select a procedure you would like to perform. All price list wizard features begin with these steps.

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



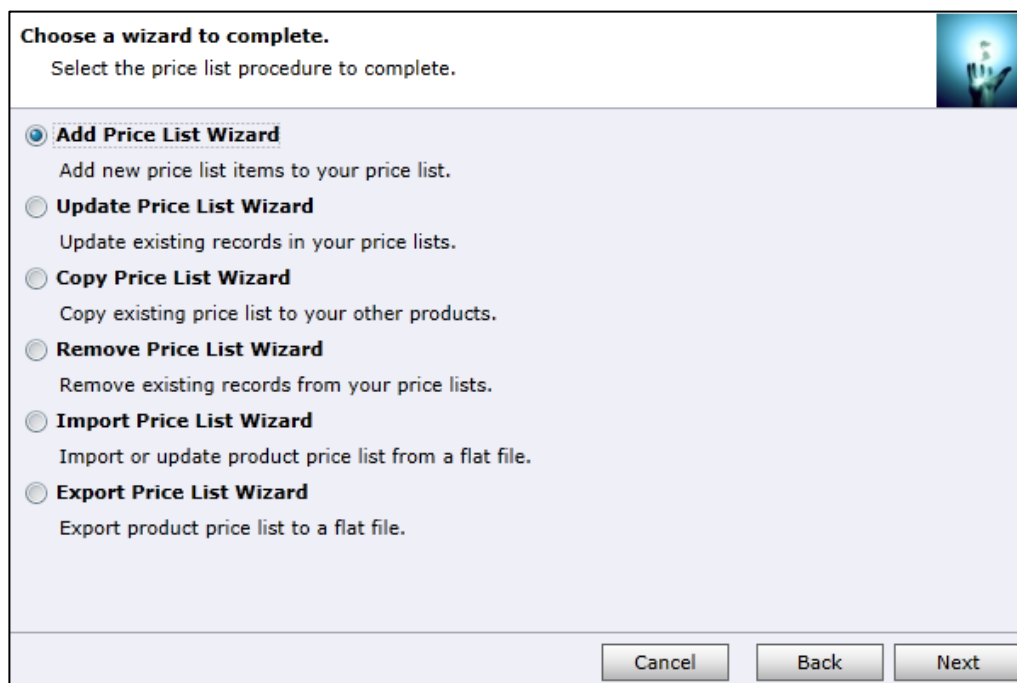
4. Welcome to Price List Utilities 2011

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

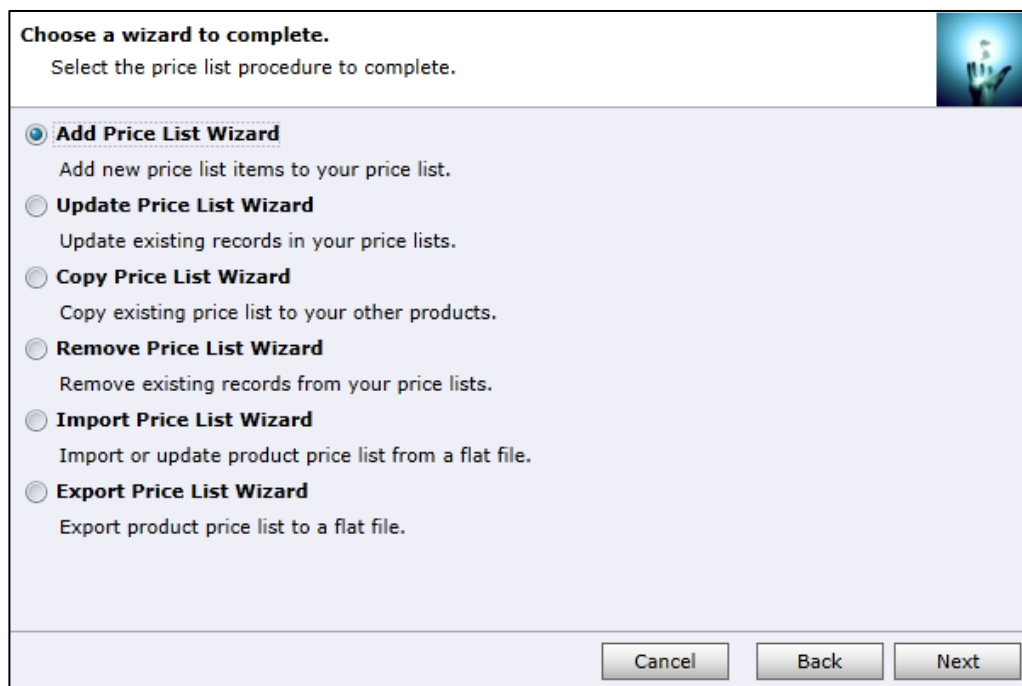
You can use this wizard to add price list item information to multiple products at once.

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".



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

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.

Select a price list and restrictions.

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

Price List*

Unit Group*

First Product ID

Last Product ID

Cancel Back Next

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.

Specify pricing details.

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

Unit*

Discount List

Quantity Selling Option*

Pricing Method*

Amount*

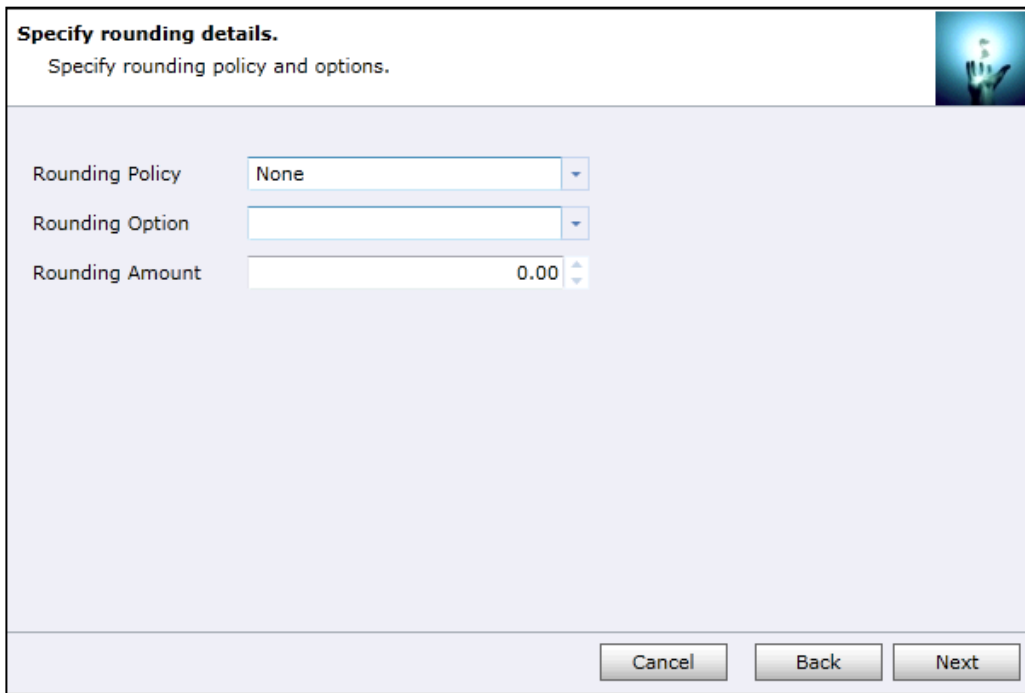
Currency

Cancel Back Next

Click "Next" to continue.

4. Specify rounding details

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



Specify rounding details.
Specify rounding policy and options.

Rounding Policy:

Rounding Option:

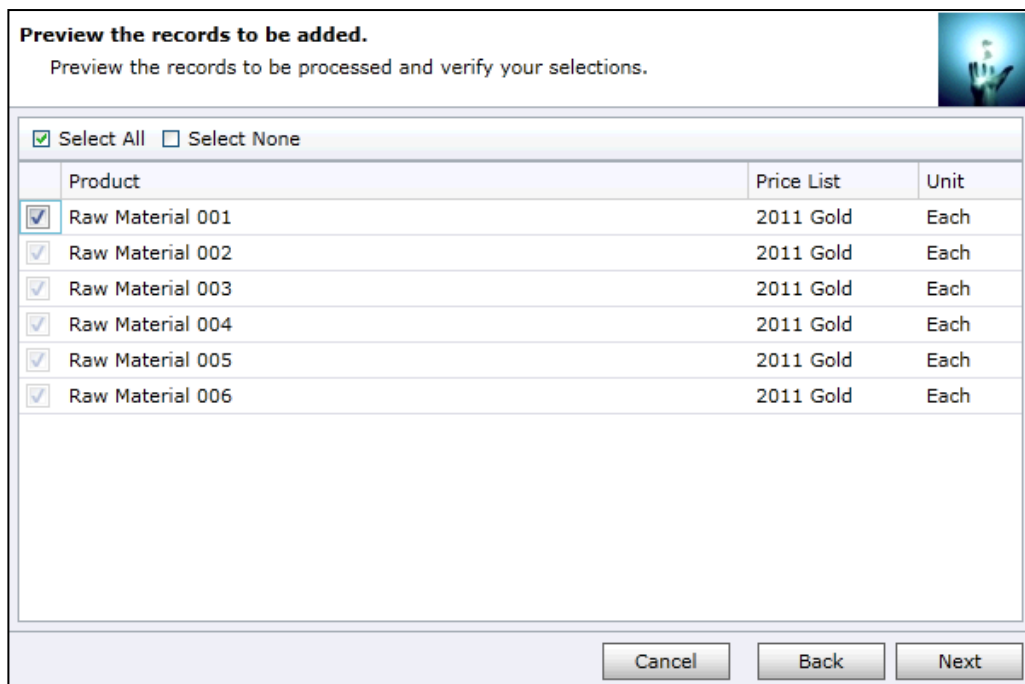
Rounding Amount:

Buttons: Cancel, Back, Next

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.



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"/> Raw Material 001	2011 Gold	Each
<input checked="" type="checkbox"/> Raw Material 002	2011 Gold	Each
<input checked="" type="checkbox"/> Raw Material 003	2011 Gold	Each
<input checked="" type="checkbox"/> Raw Material 004	2011 Gold	Each
<input checked="" type="checkbox"/> Raw Material 005	2011 Gold	Each
<input checked="" type="checkbox"/> Raw Material 006	2011 Gold	Each

Buttons: Cancel, Back, Next

Click "Next" to continue.

6. Review the 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	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

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.

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

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

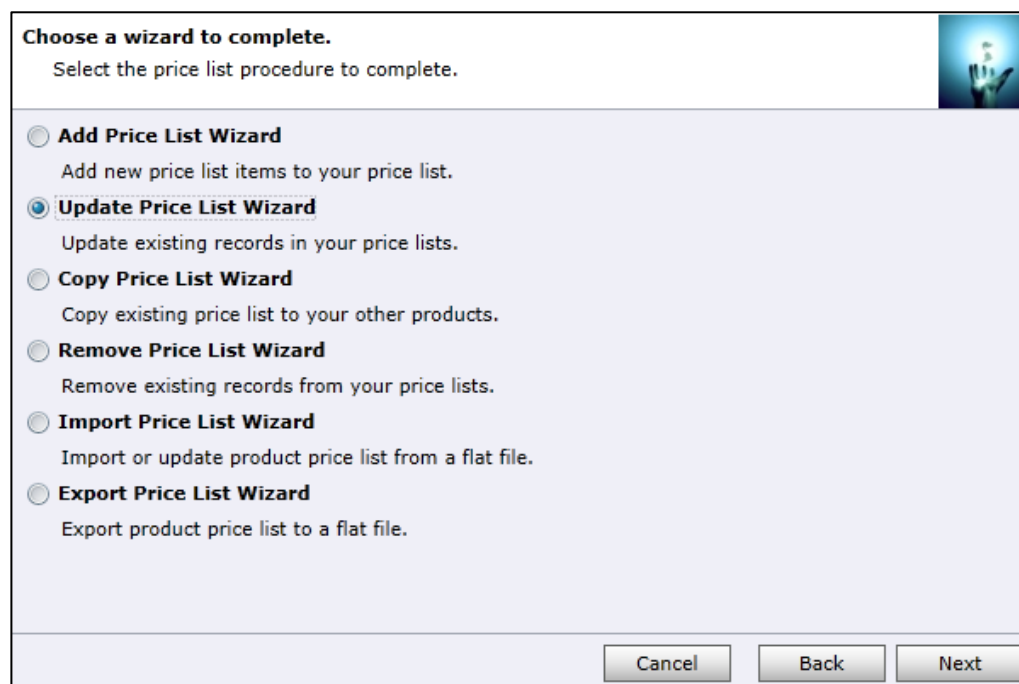
You can use this wizard to update price list item information for multiple products at once.

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”.



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

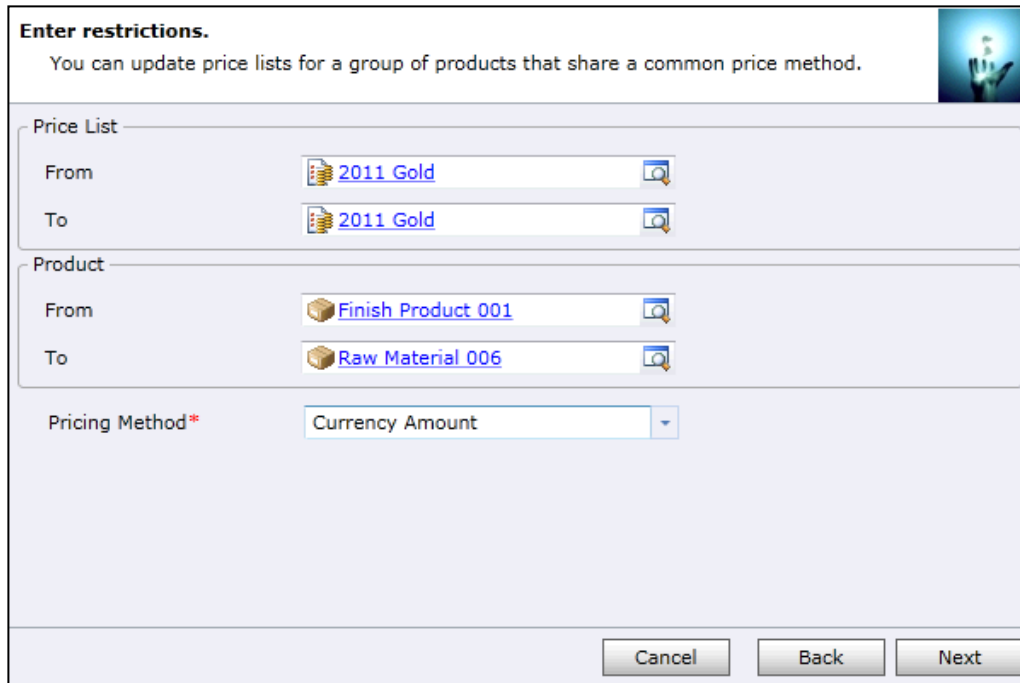
- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☒ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price 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

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.





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 

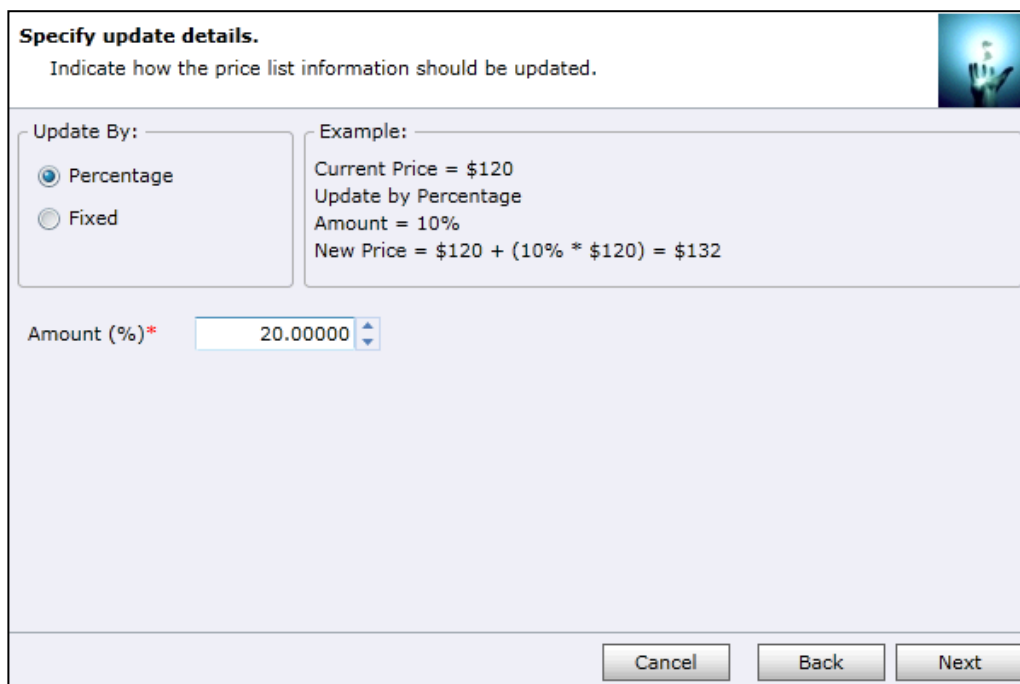
Pricing Method*  Currency Amount 

Cancel Back Next

Click "Next" to continue.

3. 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 (%)  20.00000 

Cancel Back Next

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.

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
<input checked="" type="checkbox"/>	Raw Material 001	2011 Gold	Each	250.00	300.00
<input checked="" type="checkbox"/>	Raw Material 002	2011 Gold	Each	250.00	300.00
<input checked="" type="checkbox"/>	Raw Material 003	2011 Gold	Each	250.00	300.00
<input checked="" type="checkbox"/>	Raw Material 004	2011 Gold	Each	250.00	300.00
<input checked="" type="checkbox"/>	Raw Material 005	2011 Gold	Each	250.00	300.00
<input checked="" type="checkbox"/>	Raw Material 006	2011 Gold	Each	250.00	300.00
<input checked="" type="checkbox"/>	Finish Product 001	2011 Gold	Each	1250.00	1500.00
<input checked="" type="checkbox"/>	Finish Product 002	2011 Gold	Each	1250.00	1500.00
<input checked="" type="checkbox"/>	Finish Product 003	2011 Gold	Each	1250.00	1500.00
<input checked="" type="checkbox"/>	Finish Product 004	2011 Gold	Each	1250.00	1500.00
<input checked="" type="checkbox"/>	Finish Product 005	2011 Gold	Each	1250.00	1500.00

Cancel

Back

Next

Click "Next" to continue.

5. Review the 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	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

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.

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

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.



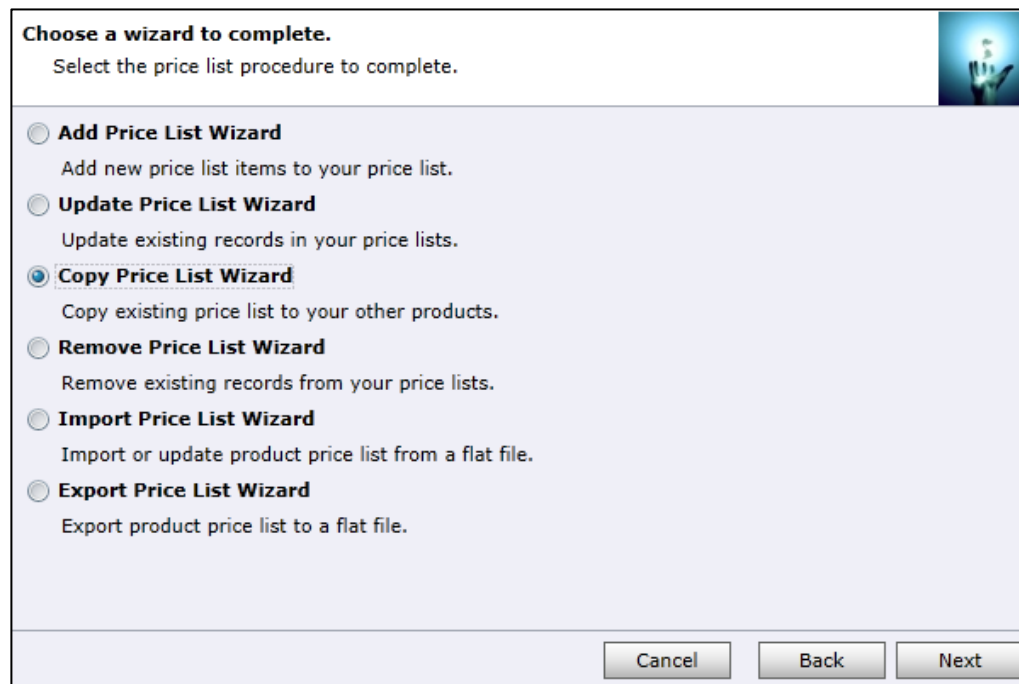
Chapter 4: Copying price list items from one product to other products

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”.



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

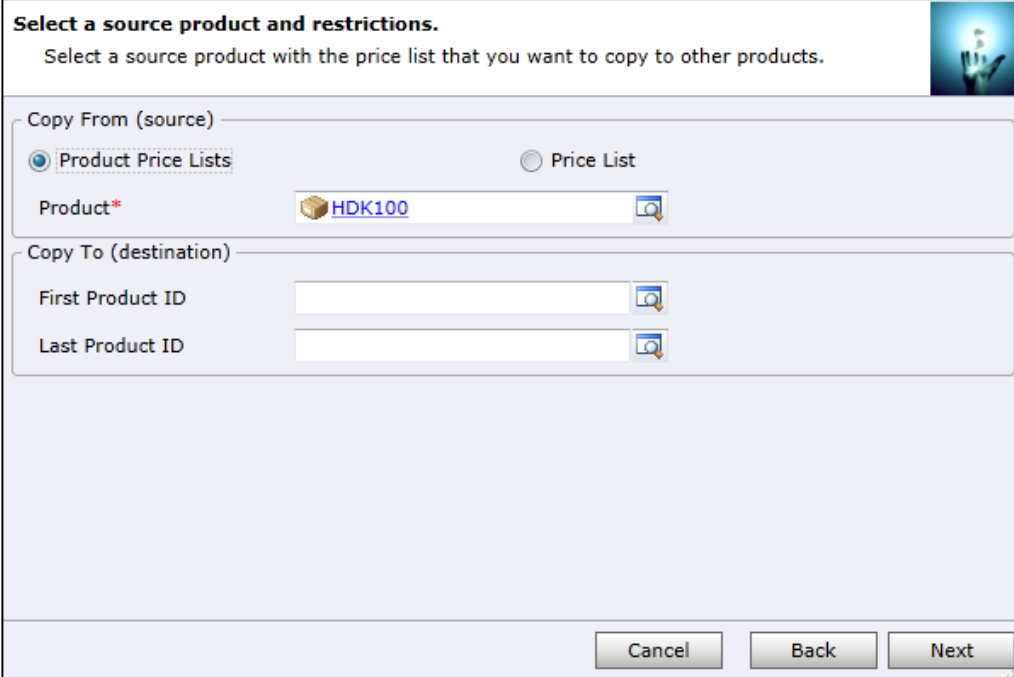
Click “Next” to continue.

2. Select source product and restrictions

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



The screenshot shows a software dialog box titled "Select a source product and restrictions." with a subtitle "Select a source product with the price list that you want to copy to other products." The dialog is divided into two main sections: "Copy From (source)" and "Copy To (destination)". In the "Copy From" section, there are two radio buttons: "Product Price Lists" (which is selected) and "Price List". Below these is a text field labeled "Product*" containing the value "HDK100" and a magnifying glass icon. The "Copy To" section contains two text fields: "First Product ID" and "Last Product ID", each with a magnifying glass icon. At the bottom of the dialog are three buttons: "Cancel", "Back", and "Next".



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.



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

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.

Preview the records to be copied.
Preview the records to be processed and verify your selections.

☒ Select All ☐ Select None

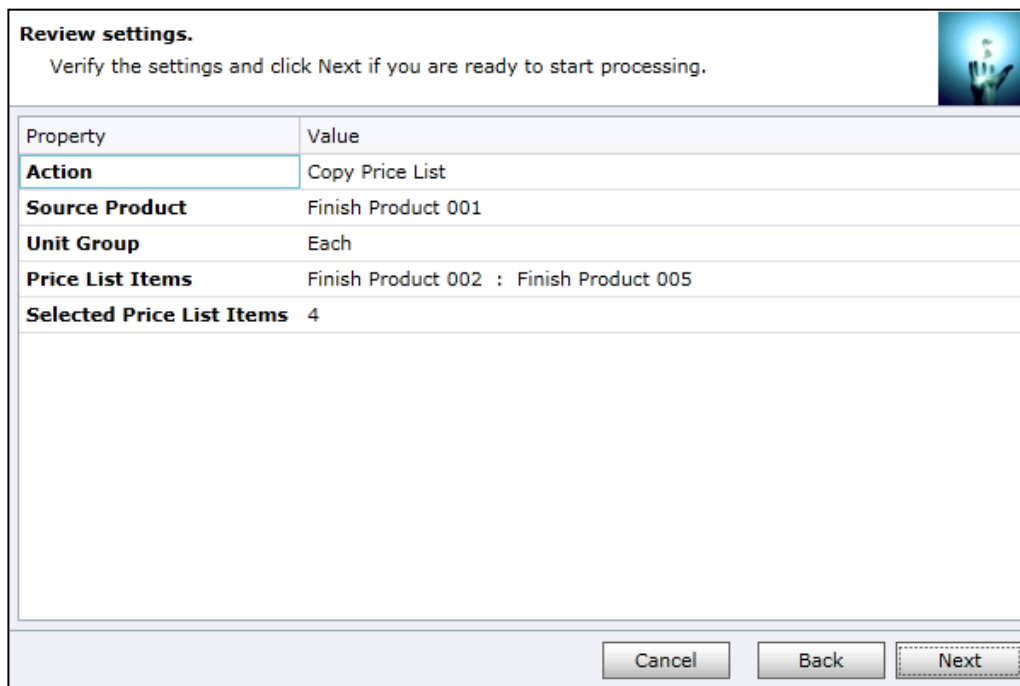
	Product	Price List	Unit
<input checked="" type="checkbox"/>	Finish Product 002	2011 Gold	Each
<input checked="" type="checkbox"/>	Finish Product 003	2011 Gold	Each
<input checked="" type="checkbox"/>	Finish Product 004	2011 Gold	Each
<input checked="" type="checkbox"/>	Finish Product 005	2011 Gold	Each

Cancel Back Next

Click "Next" to continue.

4. Review the 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.

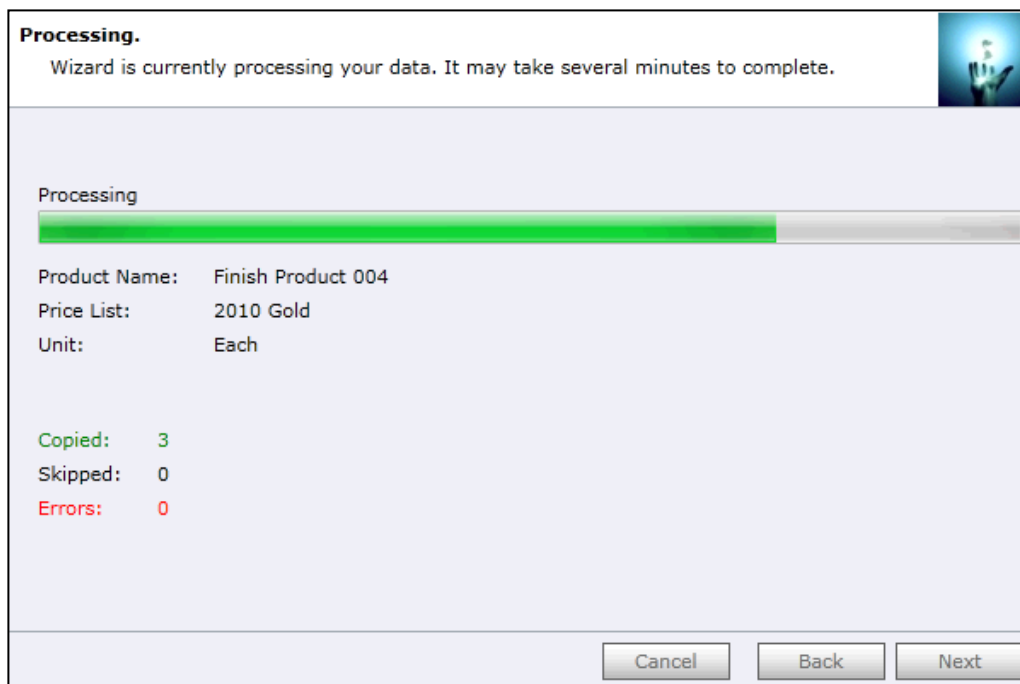
Property	Value
Action	Copy Price List
Source Product	Finish Product 001
Unit Group	Each
Price List Items	Finish Product 002 : Finish Product 005
Selected Price List Items	4

Buttons: Cancel, Back, Next

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.



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

Buttons: Cancel, Back, Next

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.



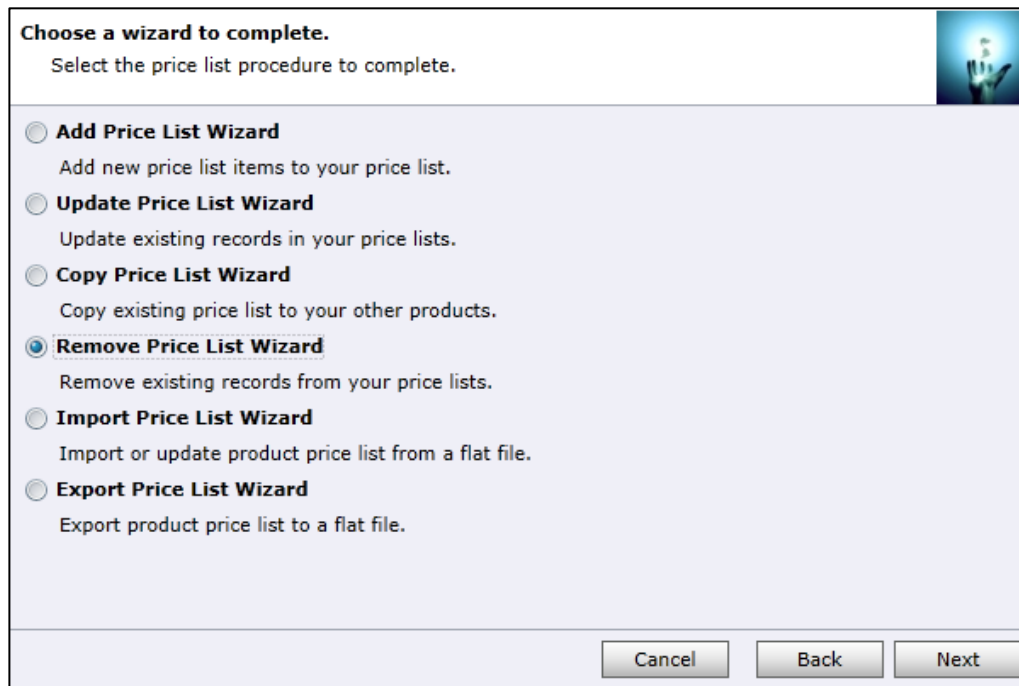
Chapter 5: Removing price list items from multiple products

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”.



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

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.

Enter restrictions.
Enter restrictions to limit the price list items that will be removed.

Price List

From 2010 Gold

To 2010 Gold

Product

From Finish Product 001

To Finish Product 003

Cancel Back Next

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.

Preview the records to be removed.
Preview the records to be processed and verify your selections.

☒ Select All ☐ Select None

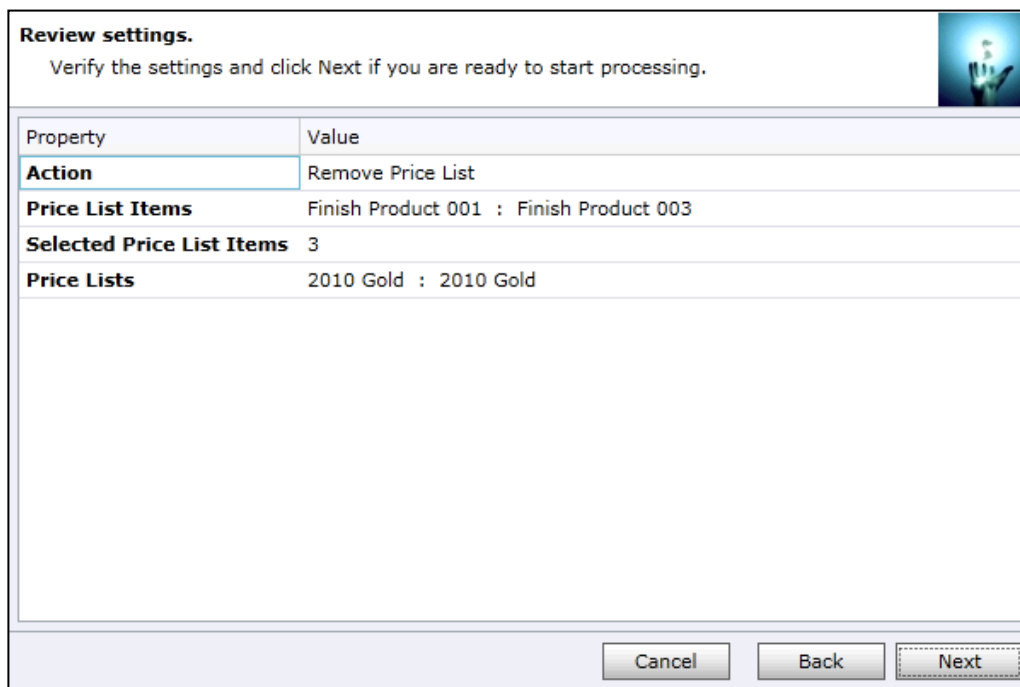
Product	Price List	Unit
<input checked="" type="checkbox"/> Finish Product 001	2010 Gold	Each
<input checked="" type="checkbox"/> Finish Product 002	2010 Gold	Each
<input checked="" type="checkbox"/> Finish Product 003	2010 Gold	Each

Cancel Back Next

Click "Next" to continue.

4. Review the settings

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

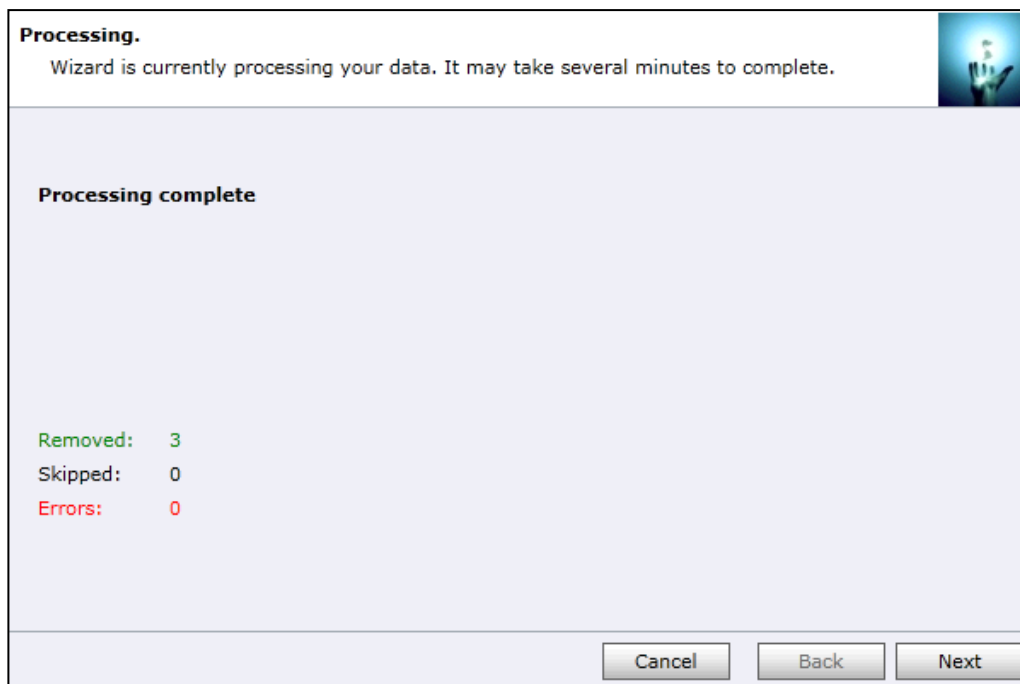


Property	Value
Action	Remove Price List
Price List Items	Finish Product 001 : Finish Product 003
Selected Price List Items	3
Price Lists	2010 Gold : 2010 Gold

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.



Processing complete

Removed: 3
Skipped: 0
Errors: 0

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.

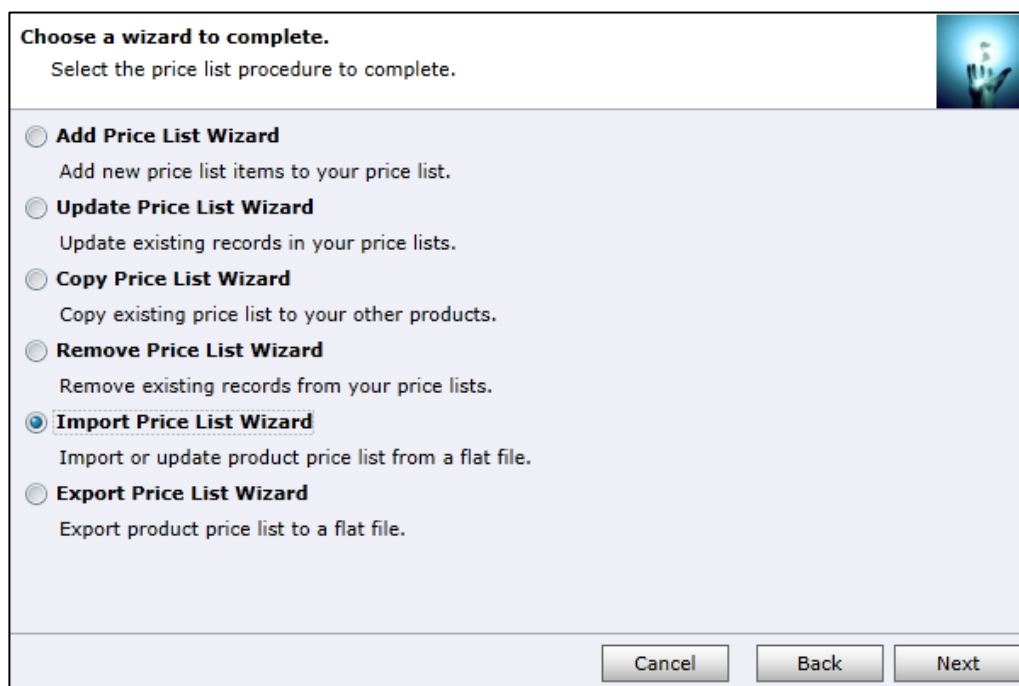
Requirements for the successful import or update:

- 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”.



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

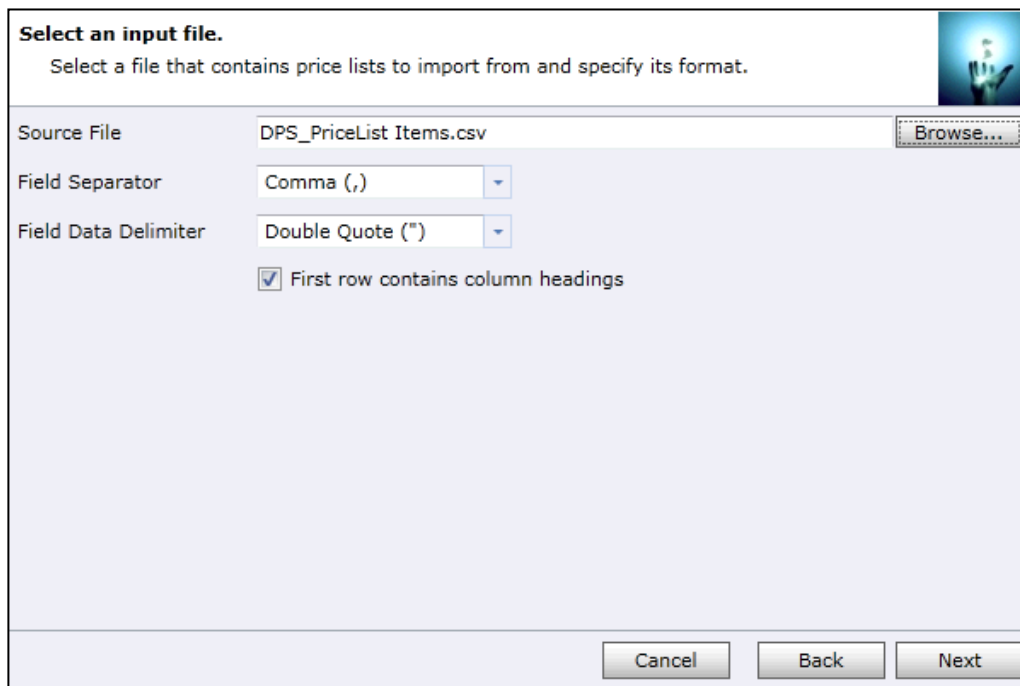
- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price 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

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 Field Data Delimiter fields are correctly selected.
- Specify whether your file contains a header.



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 (")

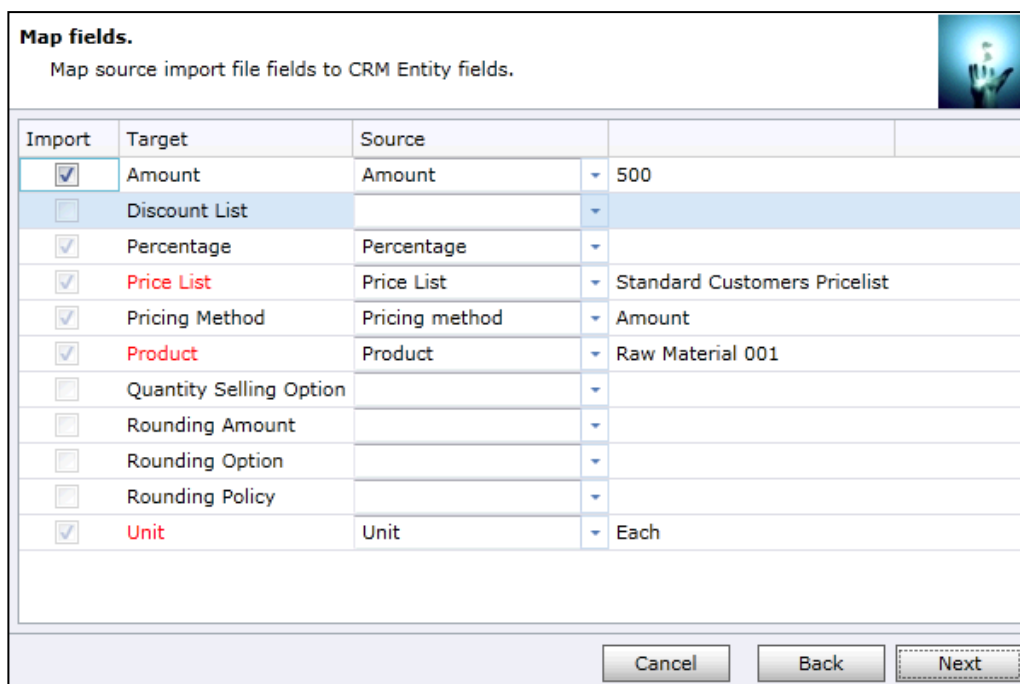
☒ First row contains column headings

Cancel Back Next

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.



Map fields.
Map source import file fields to CRM Entity fields.

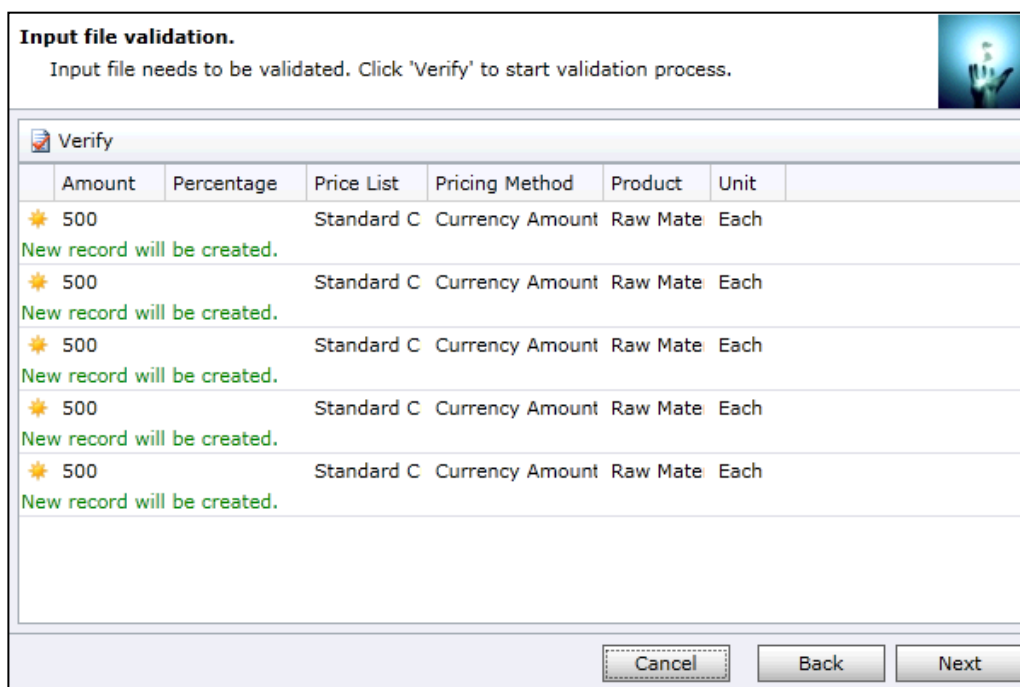
Import	Target	Source	
<input checked="" type="checkbox"/>	Amount	Amount	500
<input type="checkbox"/>	Discount List		
<input checked="" type="checkbox"/>	Percentage	Percentage	
<input checked="" type="checkbox"/>	Price List	Price List	Standard Customers Pricelist
<input checked="" type="checkbox"/>	Pricing Method	Pricing method	Amount
<input checked="" type="checkbox"/>	Product	Product	Raw Material 001
<input type="checkbox"/>	Quantity Selling Option		
<input type="checkbox"/>	Rounding Amount		
<input type="checkbox"/>	Rounding Option		
<input type="checkbox"/>	Rounding Policy		
<input checked="" type="checkbox"/>	Unit	Unit	Each

Cancel Back Next

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.



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

Verify

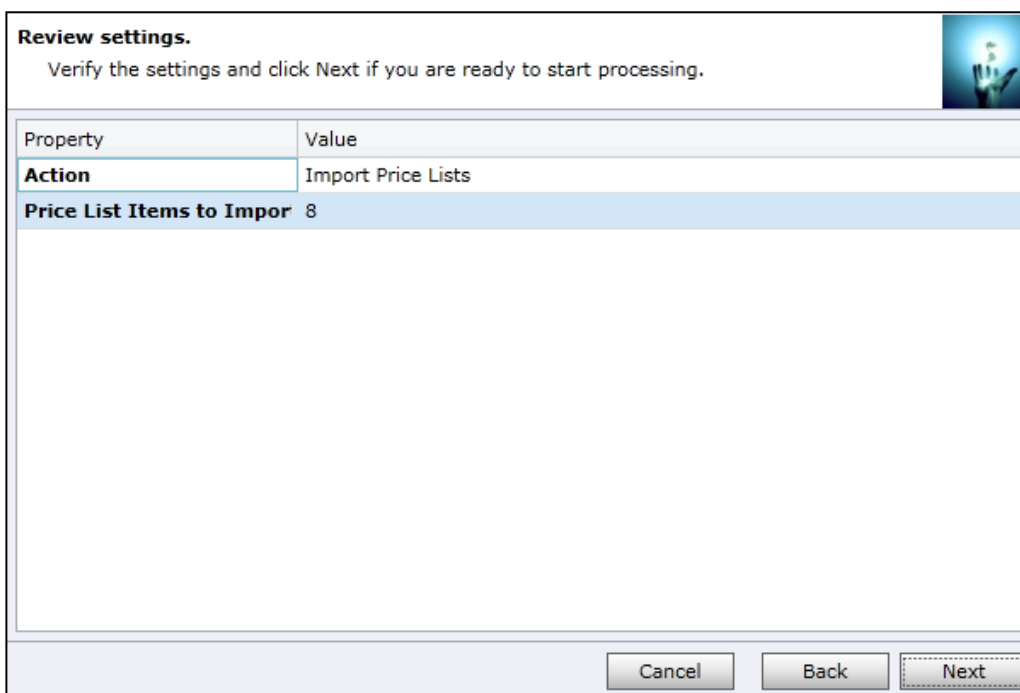
Amount	Percentage	Price List	Pricing Method	Product	Unit	
500		Standard C	Currency Amount	Raw Mate	Each	New record will be created.
500		Standard C	Currency Amount	Raw Mate	Each	New record will be created.
500		Standard C	Currency Amount	Raw Mate	Each	New record will be created.
500		Standard C	Currency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

Cancel Back Next

Click "Next" to continue.

5. Review the 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.

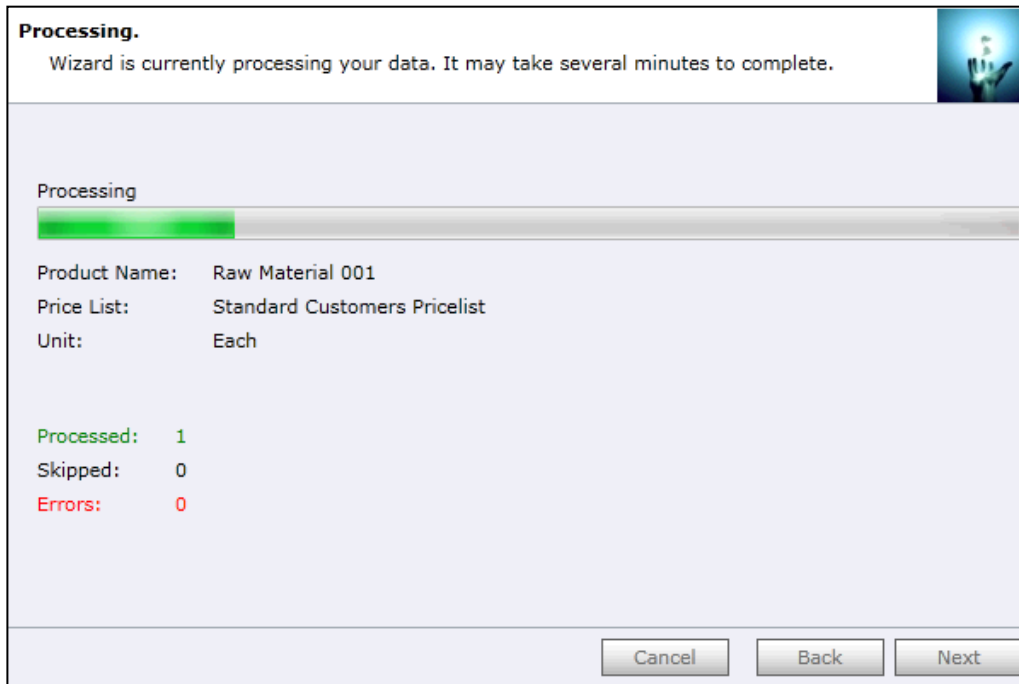
Property	Value
Action	Import Price Lists
Price List Items to Import	8

Cancel Back Next

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.



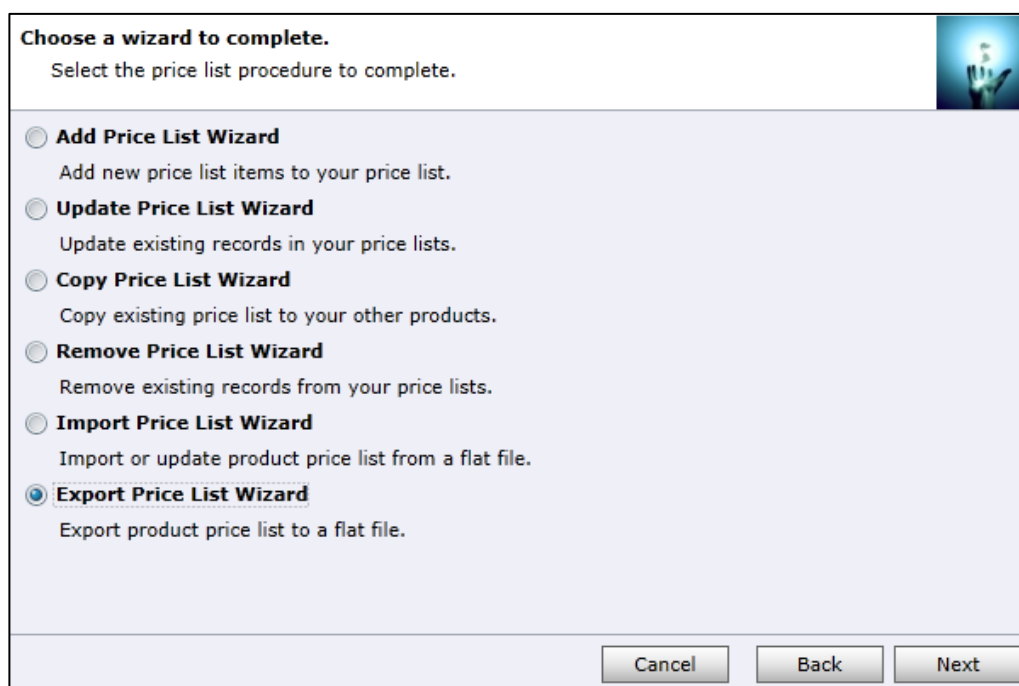
Chapter 7: Exporting price list items from a file

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

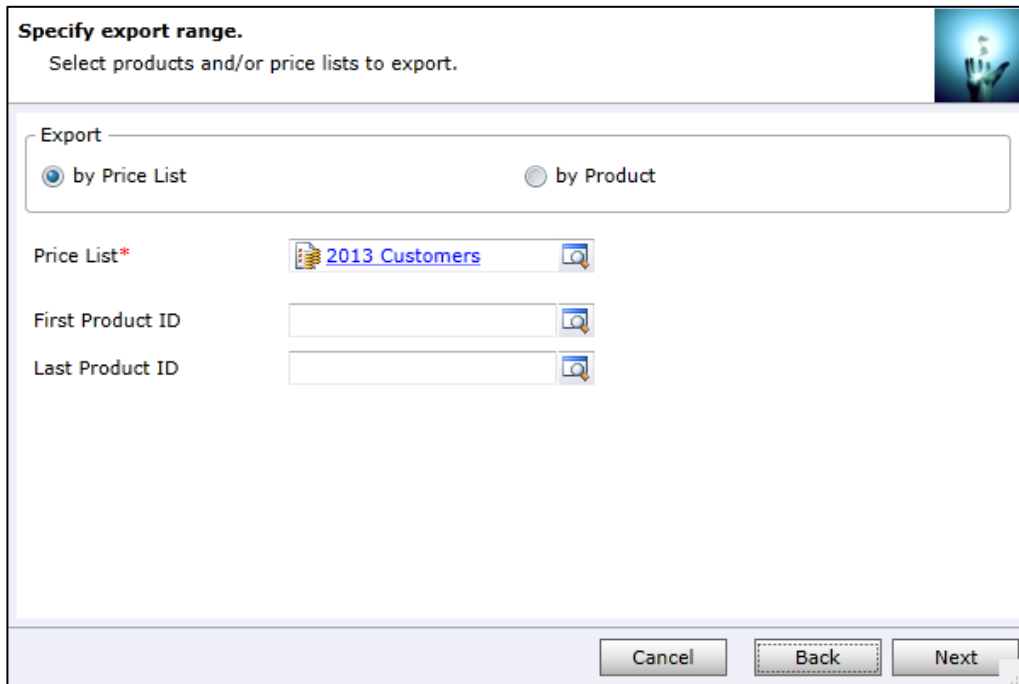
In the "Choose a wizard to complete" screen select the "Export Price List Wizard".



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.

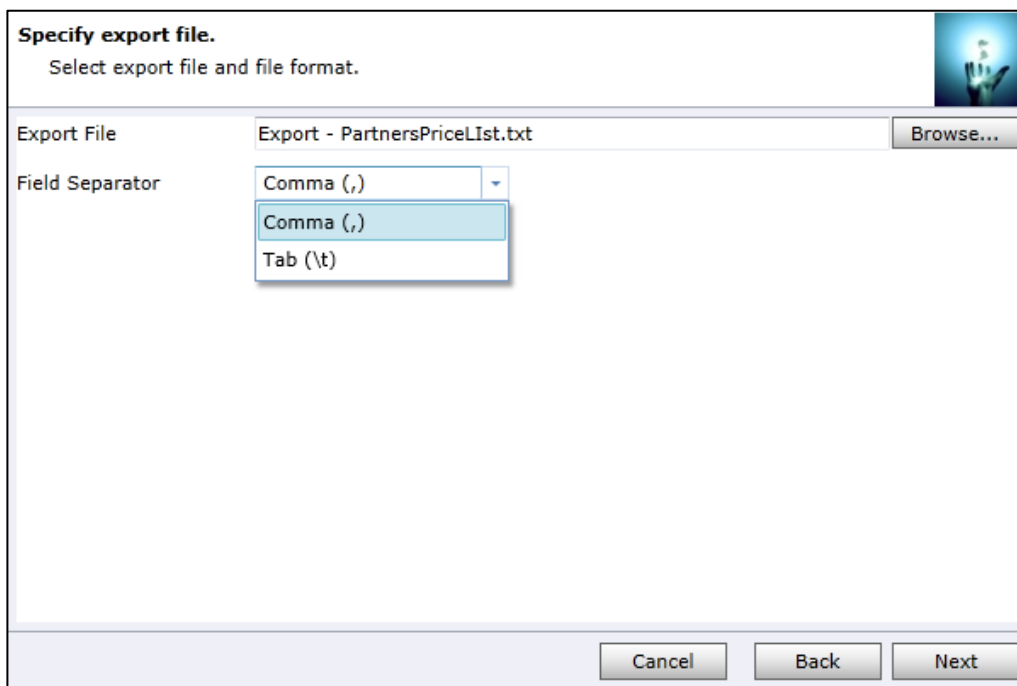


The dialog box is titled "Specify export range." with a subtitle "Select products and/or price lists to export." and a small icon of a hand holding a dollar sign. It contains two radio buttons under the "Export" section: "by Price List" (selected) and "by Product". Below this, there are three input fields: "Price List*" with a dropdown menu showing "2013 Customers", "First Product ID", and "Last Product ID", each with a search icon. At the bottom are "Cancel", "Back", and "Next" buttons.

Click "Next" to continue.

2. Specify export file.

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



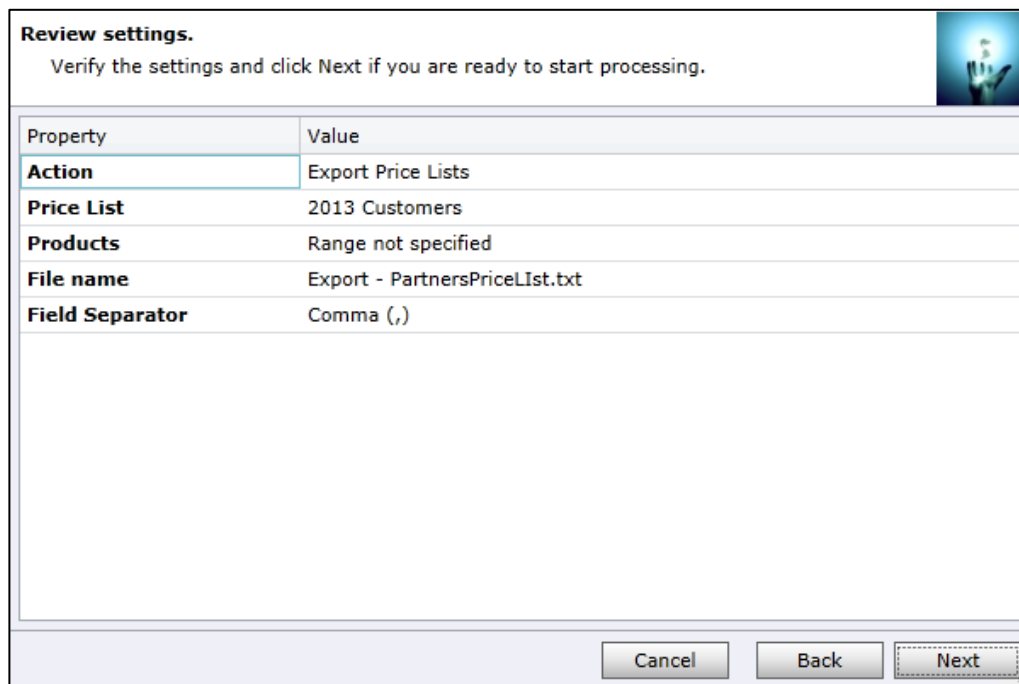
The dialog box is titled "Specify export file." with a subtitle "Select export file and file format." and a small icon of a hand holding a dollar sign. It contains an "Export File" text box with the value "Export - PartnersPriceList.txt" and a "Browse..." button. Below this is a "Field Separator" dropdown menu with a list showing "Comma (,)" (selected), "Comma (,)", and "Tab (\t)". At the bottom are "Cancel", "Back", and "Next" buttons.

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



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

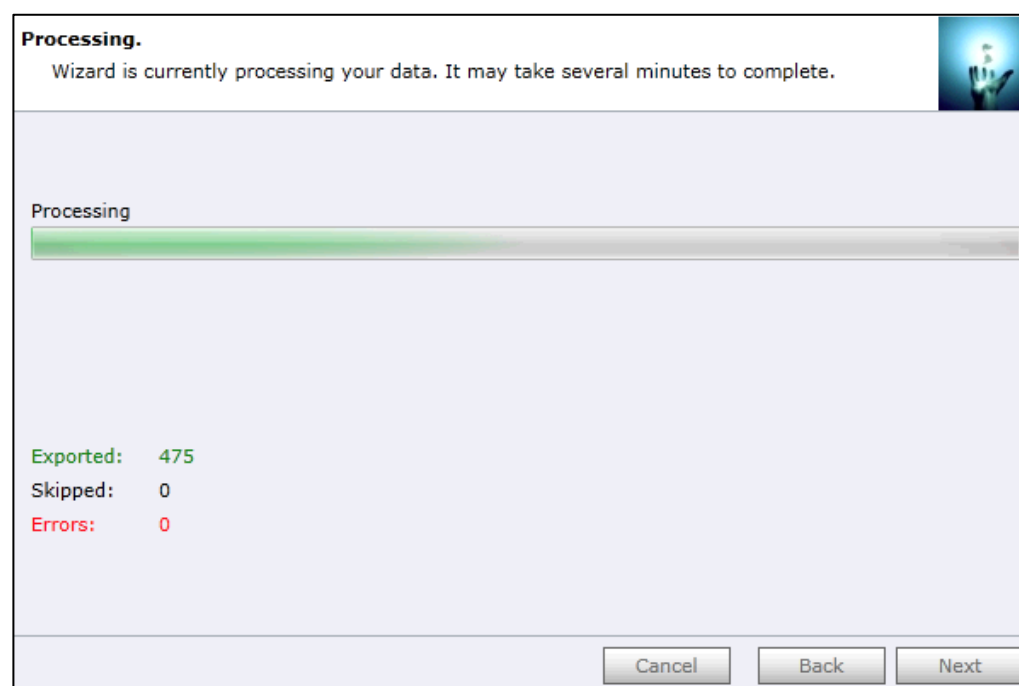
Property	Value
Action	Export Price Lists
Price List	2013 Customers
Products	Range not specified
File name	Export - PartnersPriceList.txt
Field Separator	Comma (,)

Buttons: Cancel, Back, Next

Click "Next" to continue.

4. Processing

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



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

Processing

Exported: 475
Skipped: 0
Errors: 0

Buttons: Cancel, Back, Next

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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