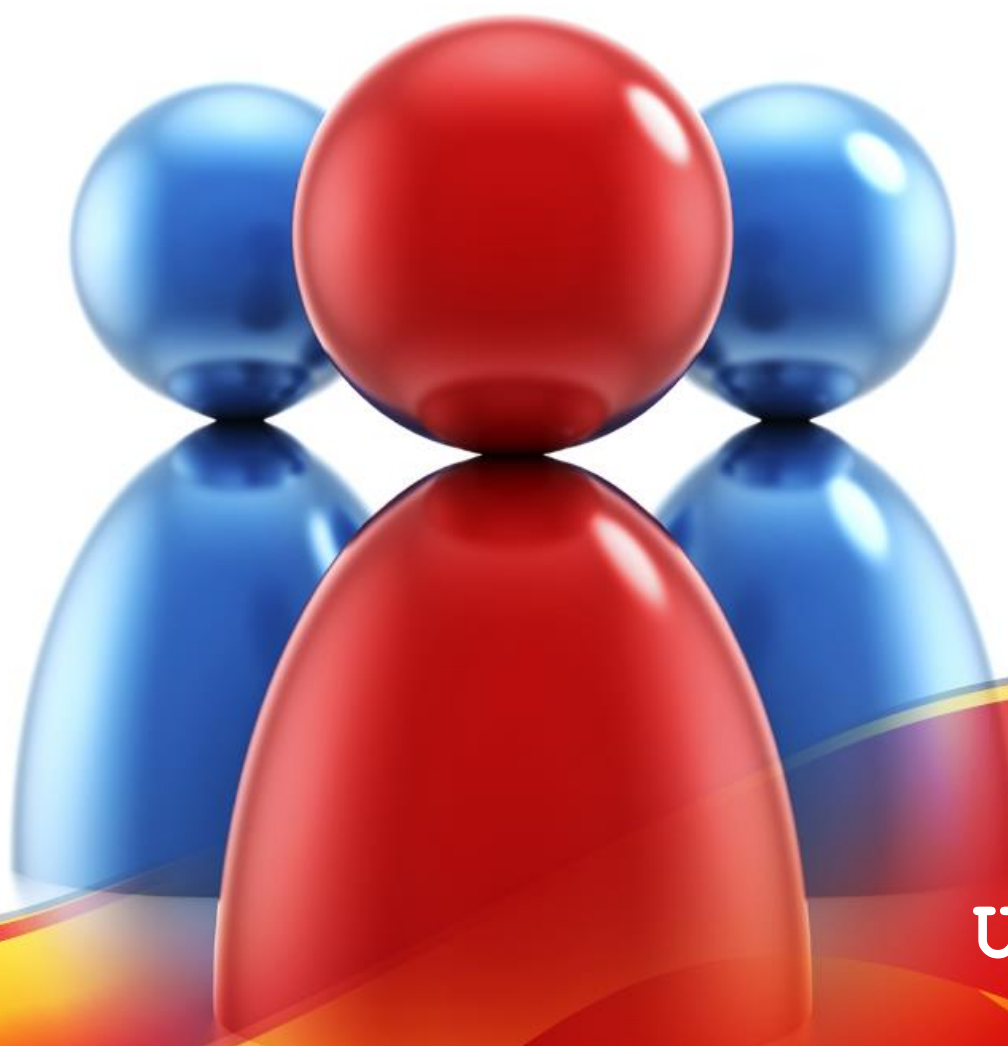




# **Price List Utilities**

**For Dynamics CRM 2015**



**User Guide**

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## ***What's in this manual***

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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 and 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.

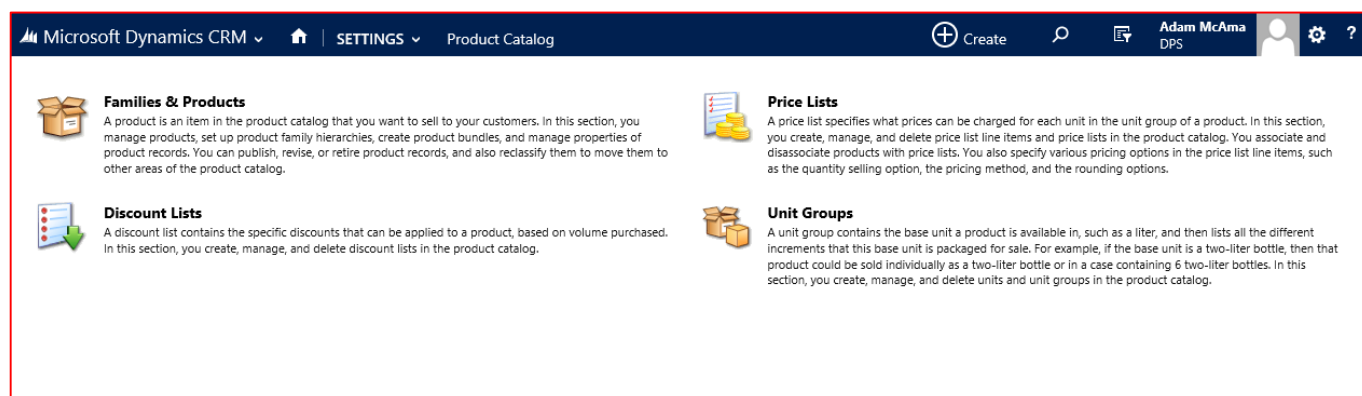
Using the wizards is straightforward, screens are easy to use and self-explanatory, but you can refer to this manual for more information when needed.

## Chapter 1: Getting started with the price list wizards

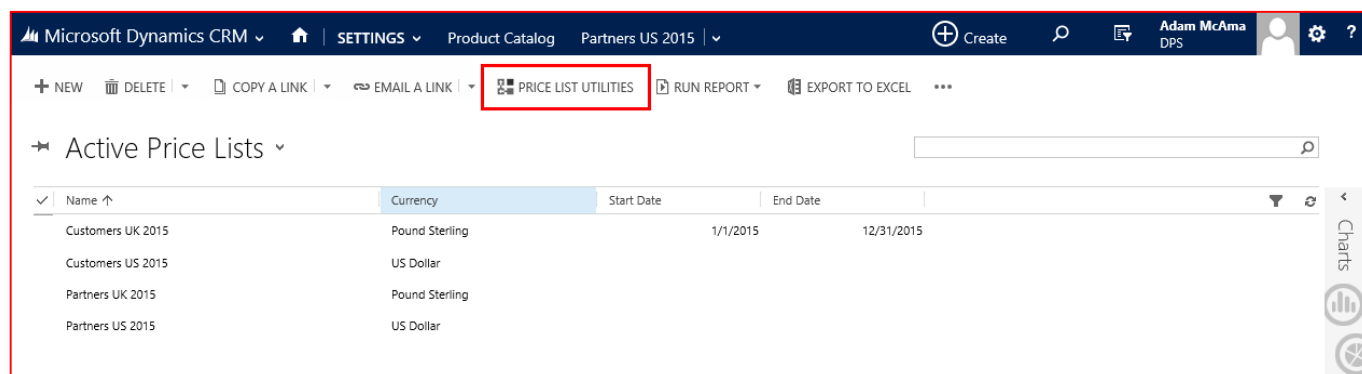
To use any of the price list wizards available in the Price List Utilities open the welcome window, navigate to the wizard selection page, and select a procedure you would like to perform. All price list wizard features begin with these steps.

### To get started with a price list wizard:

1. Log in to Microsoft Dynamics CRM 2015
2. Price List Utilities can be generally launched from two places:
  - a. Select 'Price Lists' in the Product Catalog section in the Settings area

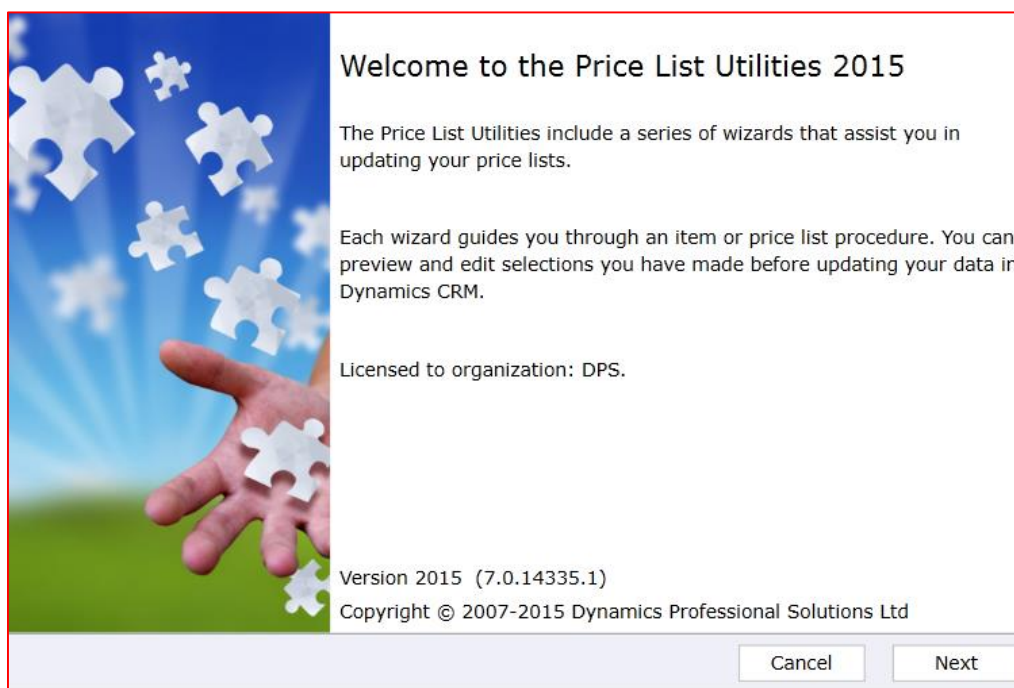


- b. Navigate to Products grid view from any location (for example Sales)
3. Click on the Price List Utilities button shown in the Ribbon



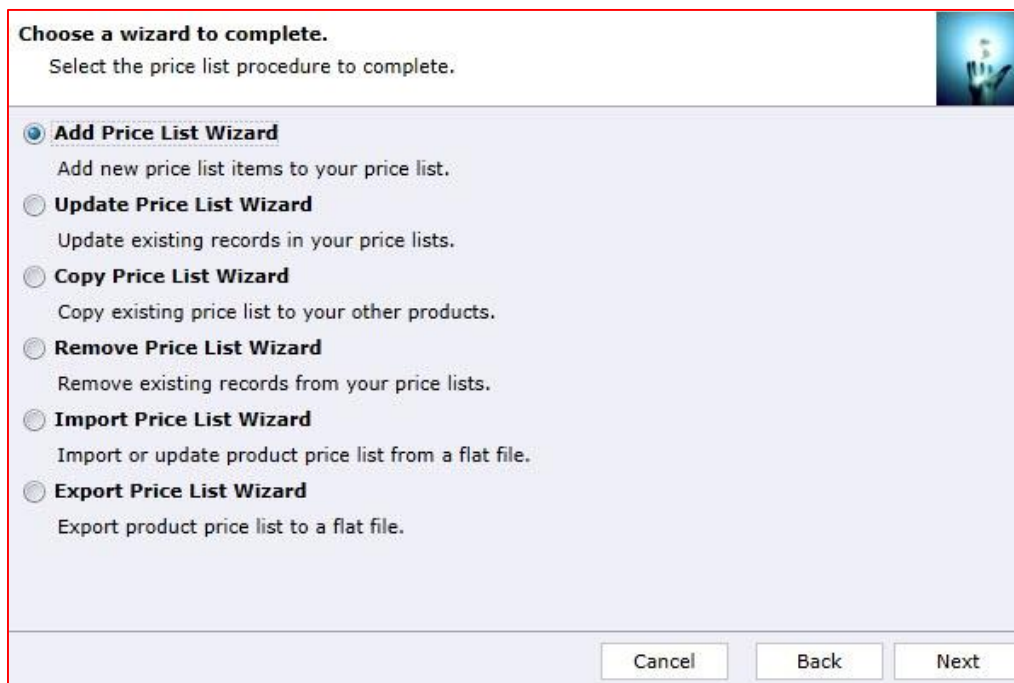
#### 4. Welcome to Price List Utilities 2015

On the Welcome to the Price List Utilities 2015 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.



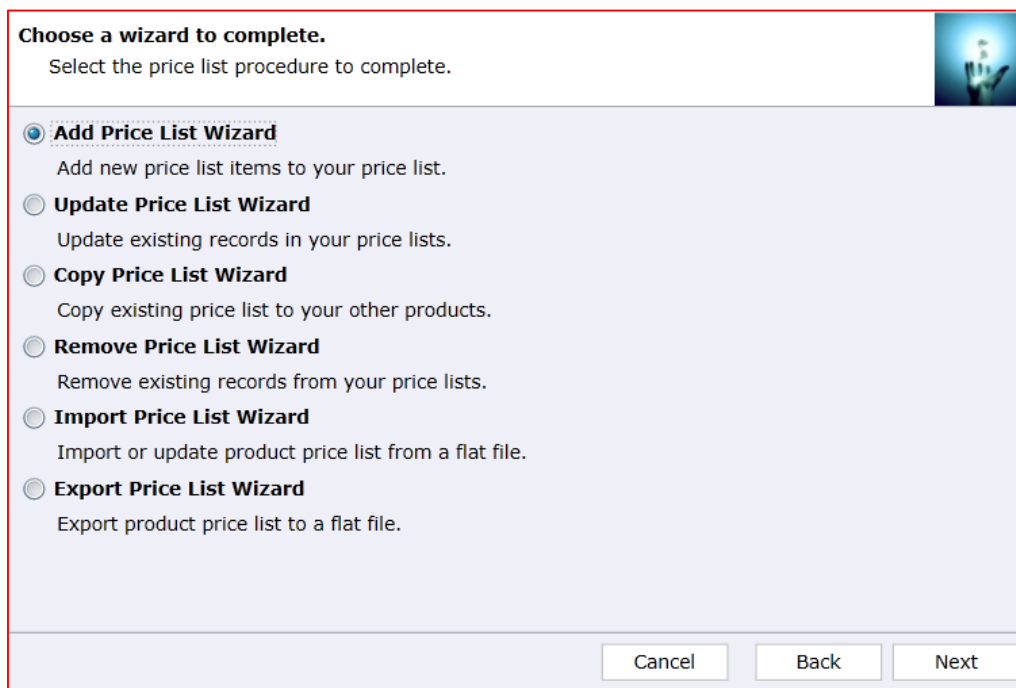
You can use this wizard to add price list item information to multiple products at once.

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\*

2013 Customers

Unit Group\*

ORG

First Product ID

ACSUM04

Last Product ID

COPY06

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\*

ORG

Discount List

Quantity Selling Option\*

Whole

Pricing Method\*

Currency Amount

Amount\*

250.00

Currency

Pound Sterling

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

Up

Rounding Option

Ends In

Rounding Amount

0.05

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"/>	DPS Activities Mass Update (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 3)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 4)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 4)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Copy Tool (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Copy Tool (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Copy Tool (CRM 4)	2013 Customers	ORG

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	2013 Customers
Unit Group	ORG
Price List Items	ACSUM04 : AMUP06
Selected Price List Items	7
Unit	ORG
Discount List	Not specified
Quantity Selling Option	Whole
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: DPS Activities Mass Update (CRM 2013)  
Price List: 2013 Customers  
Unit: ORG

Processed: 1  
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.



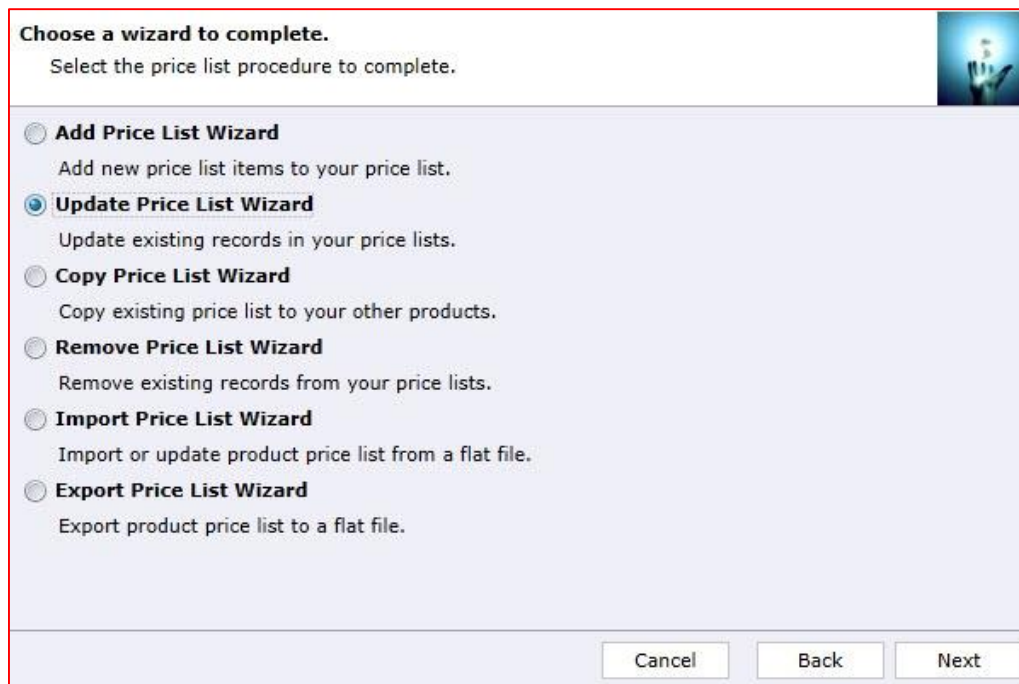
You can use this wizard to update price list item information for multiple products at once.

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.

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

Price List

From 2013 Customers

To 2013 Customers

Product

From

To

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 added.**  
Preview the records to be processed and verify your selections.

☒ Select All ☐ Select None

	Product	Price List	Unit
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 3)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Mass Update (CRM 4)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Activities Summary (CRM 4)	2013 Customers	ORG

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	Range not specified
Selected Price List Items	9
Price Lists	2013 Customers : 2013 Customers
Update Mode	Percentage
Update Amount	20.00000

CancelBackNext

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: DPS Activities Mass Update (CRM 2013)  
Price List: 2013 Customers  
Unit: ORG

Processed: 1  
Skipped: 0  
Errors: 0

CancelBackNext

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.

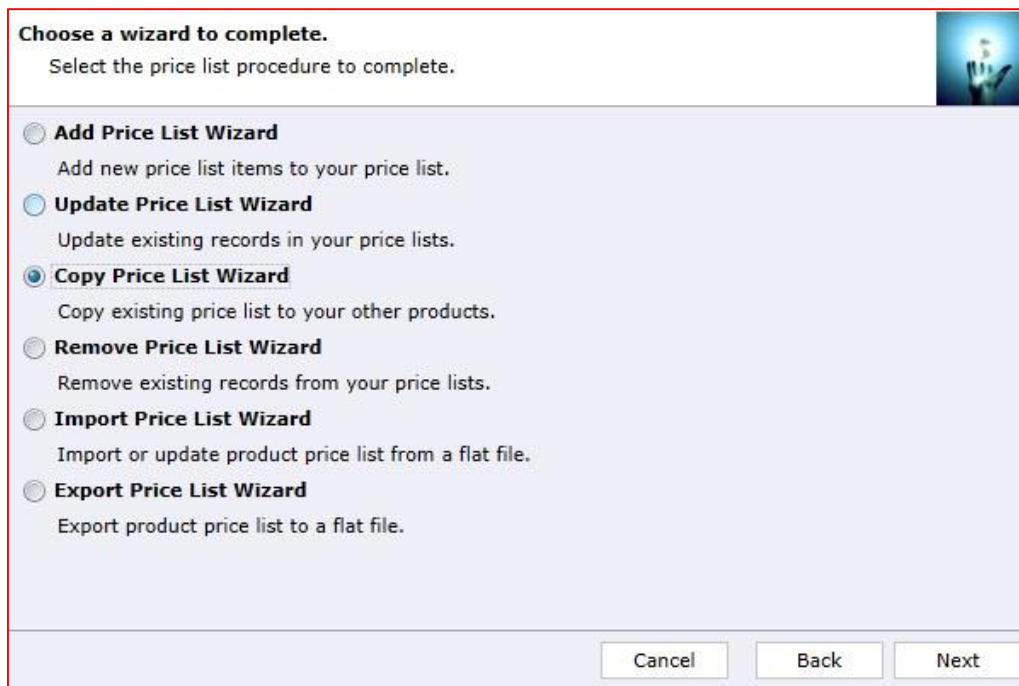


You can use this wizard to copy price list item information from one product (selected template product) to multiple products at once.

### 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:
  - 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.

**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\* IMP03

Copy To (destination)

First Product ID IMP04

Last Product ID IMP06

Cancel Back 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. Review 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"/>	DPS Import Tool (CRM 2011)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Import Tool (CRM 2013)	2013 Customers	ORG
<input checked="" type="checkbox"/>	DPS Import Tool (CRM 4)	2013 Customers	ORG

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
<b>Action</b>	Copy Price List
<b>Source Price List</b>	2014 Customers
<b>Target Price List</b>	2014 Partners
<b>Price List Items</b>	Range not specified
<b>Selected Price List Items</b>	18

Cancel

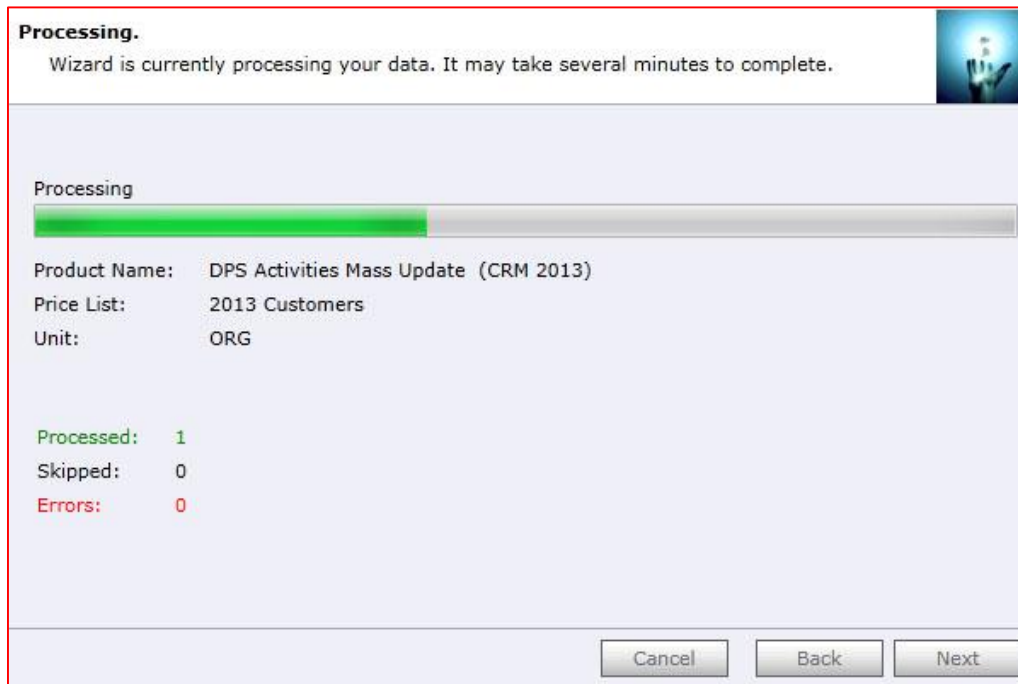
Back

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: DPS Activities Mass Update (CRM 2013)  
Price List: 2013 Customers  
Unit: ORG

Processed: 1  
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.

## 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.



**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>

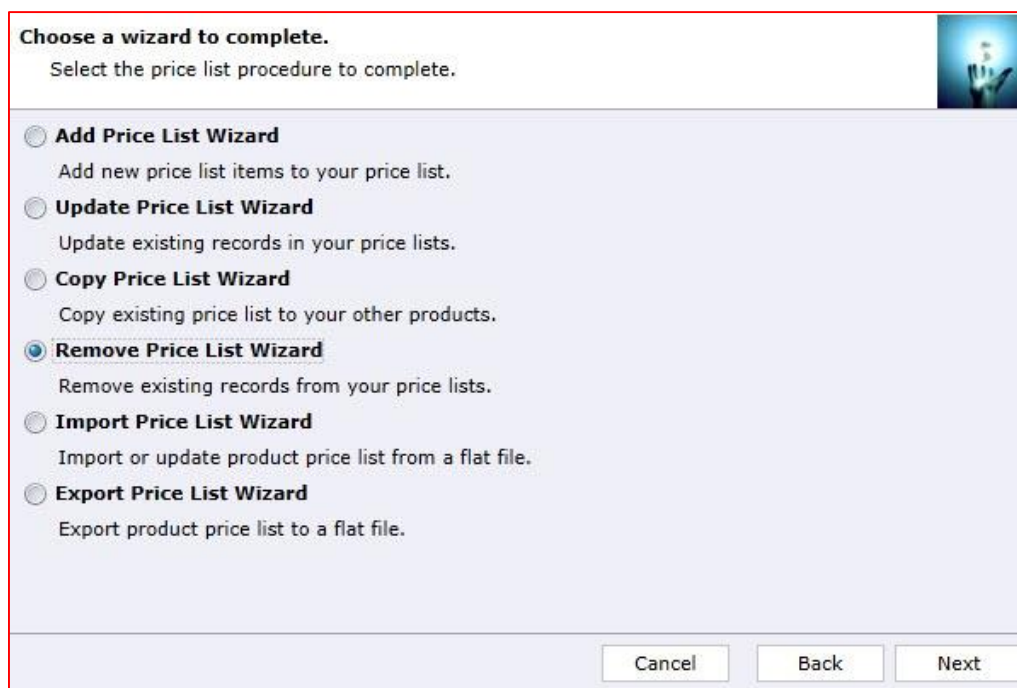
Finish

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 2013 Customers

To 2013 Customers

Product

From ACSUM04

To AMUP04

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"/> DPS Activities Mass Update (CRM 3)	2013 Customers	ORG
<input checked="" type="checkbox"/> DPS Activities Mass Update (CRM 4)	2013 Customers	ORG
<input checked="" type="checkbox"/> DPS Activities Summary (CRM 2011)	2013 Customers	ORG

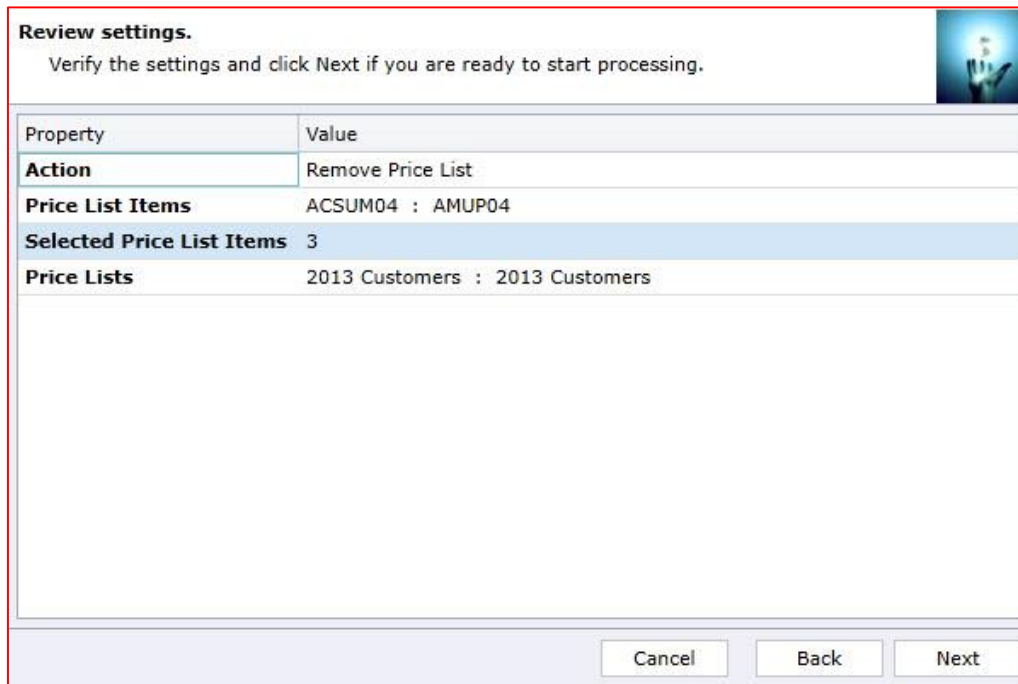
Cancel Back Next

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.

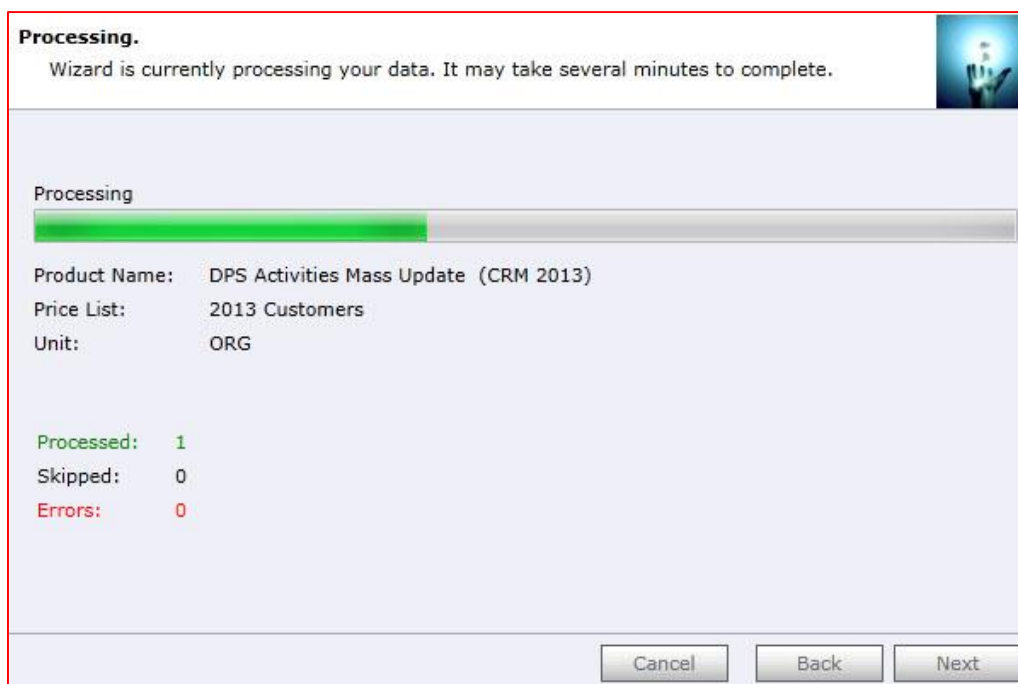
Property	Value
Action	Remove Price List
Price List Items	ACSUM04 : AMUP04
Selected Price List Items	3
Price Lists	2013 Customers : 2013 Customers

Buttons: Cancel, Back, Next

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

Processing

Product Name: DPS Activities Mass Update (CRM 2013)  
Price List: 2013 Customers  
Unit: ORG

Processed: 1  
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.



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

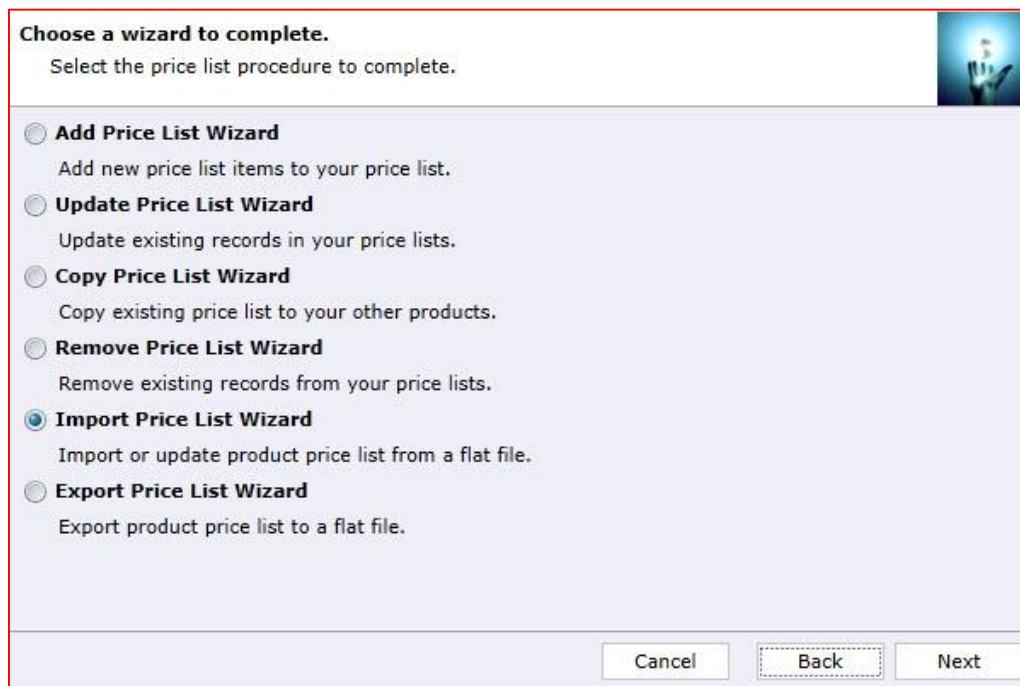
Requirements for the successful import or update:

- 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.

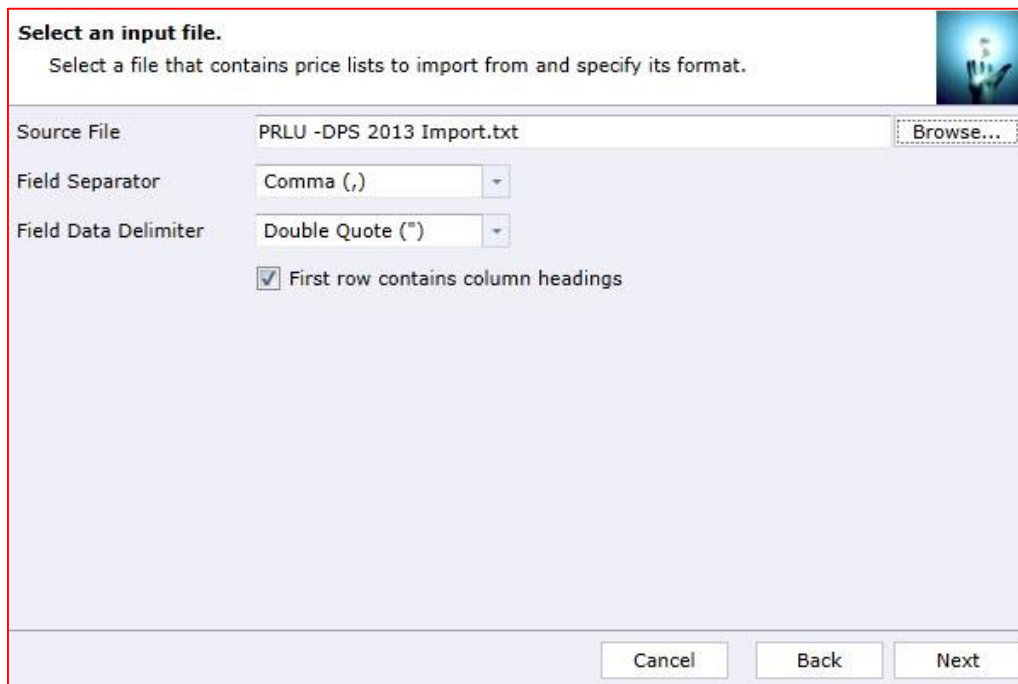
- ☐ **Add Price List Wizard**  
Add new price list items to your price list.
- ☐ **Update Price List Wizard**  
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**  
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**  
Remove existing records from 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: PRLU -DPS 2013 Import.txt Browse...

Field Separator: Comma (,)

Field Data Delimiter: Double Quote (")

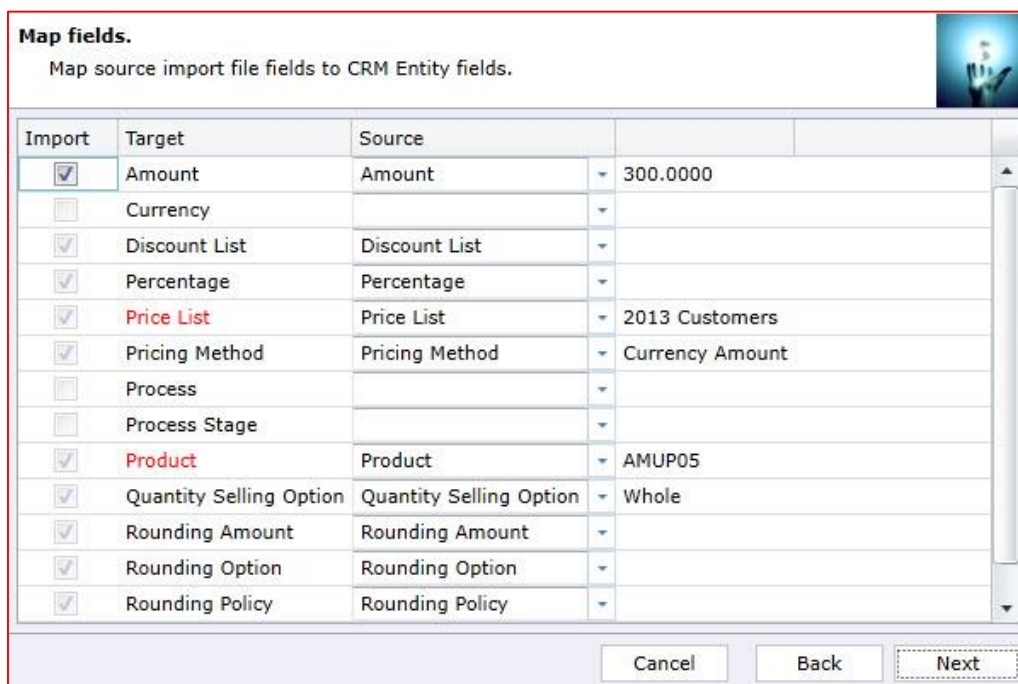
☒ First row contains column headings

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.

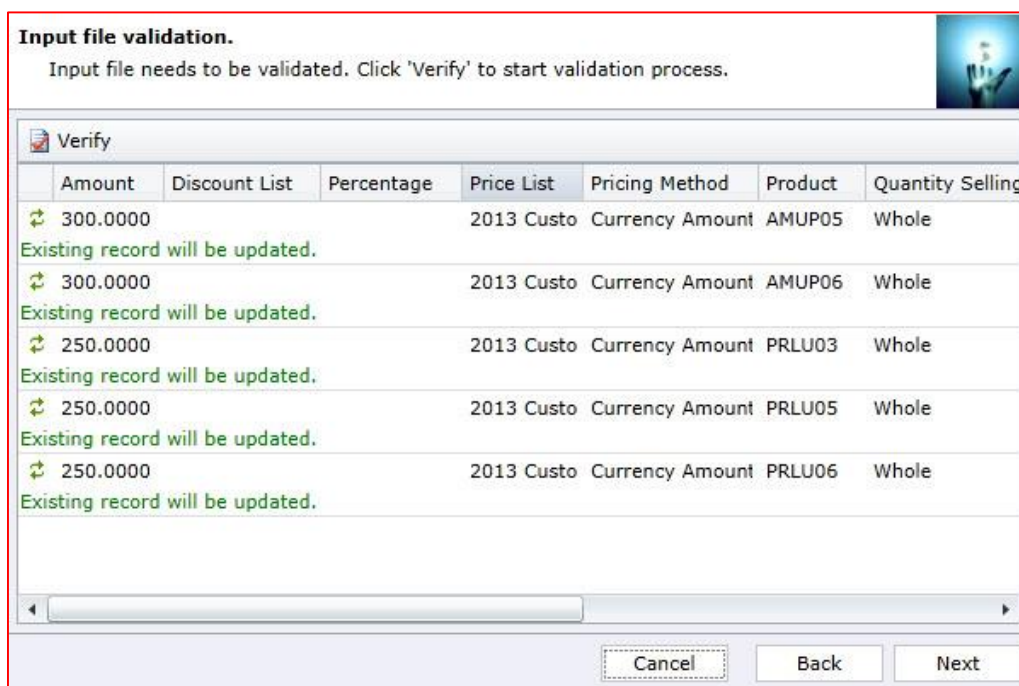
Import	Target	Source	
<input checked="" type="checkbox"/>	Amount	Amount	300.0000
<input type="checkbox"/>	Currency		
<input checked="" type="checkbox"/>	Discount List	Discount List	
<input checked="" type="checkbox"/>	Percentage	Percentage	
<input checked="" type="checkbox"/>	Price List	Price List	2013 Customers
<input checked="" type="checkbox"/>	Pricing Method	Pricing Method	Currency Amount
<input type="checkbox"/>	Process		
<input type="checkbox"/>	Process Stage		
<input checked="" type="checkbox"/>	Product	Product	AMUP05
<input checked="" type="checkbox"/>	Quantity Selling Option	Quantity Selling Option	Whole
<input checked="" type="checkbox"/>	Rounding Amount	Rounding Amount	
<input checked="" type="checkbox"/>	Rounding Option	Rounding Option	
<input checked="" type="checkbox"/>	Rounding Policy	Rounding Policy	

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

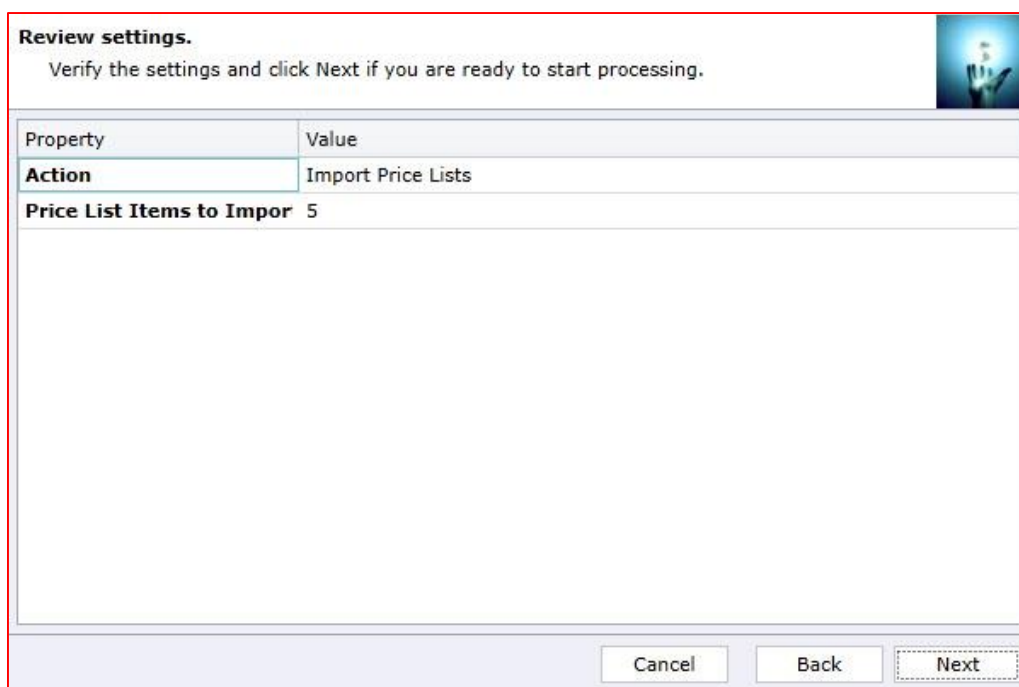
Amount	Discount List	Percentage	Price List	Pricing Method	Product	Quantity Selling
300.0000			2013 Cust	Currency Amount	AMUP05	Whole
Existing record will be updated.						
300.0000			2013 Cust	Currency Amount	AMUP06	Whole
Existing record will be updated.						
250.0000			2013 Cust	Currency Amount	PRLU03	Whole
Existing record will be updated.						
250.0000			2013 Cust	Currency Amount	PRLU05	Whole
Existing record will be updated.						
250.0000			2013 Cust	Currency Amount	PRLU06	Whole
Existing record will be updated.						

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.

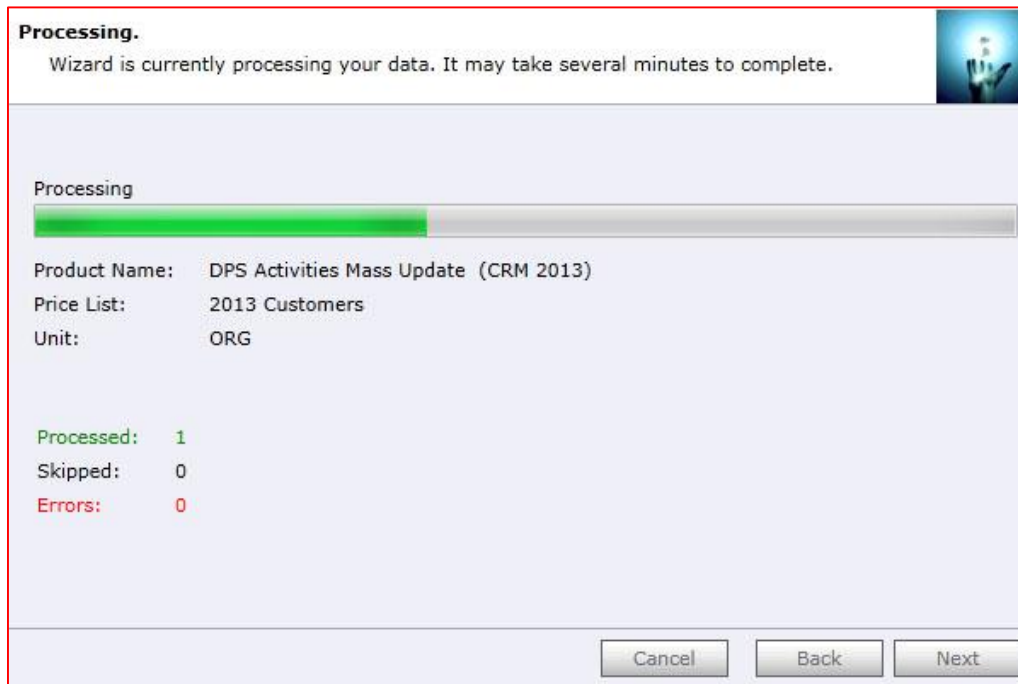
Property	Value
Action	Import Price Lists
Price List Items to Import	5

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.



**Processing.**

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

Processing

Product Name: DPS Activities Mass Update (CRM 2013)  
Price List: 2013 Customers  
Unit: ORG

Processed: 1  
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.



**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

## Chapter 7: Exporting price list items from a file

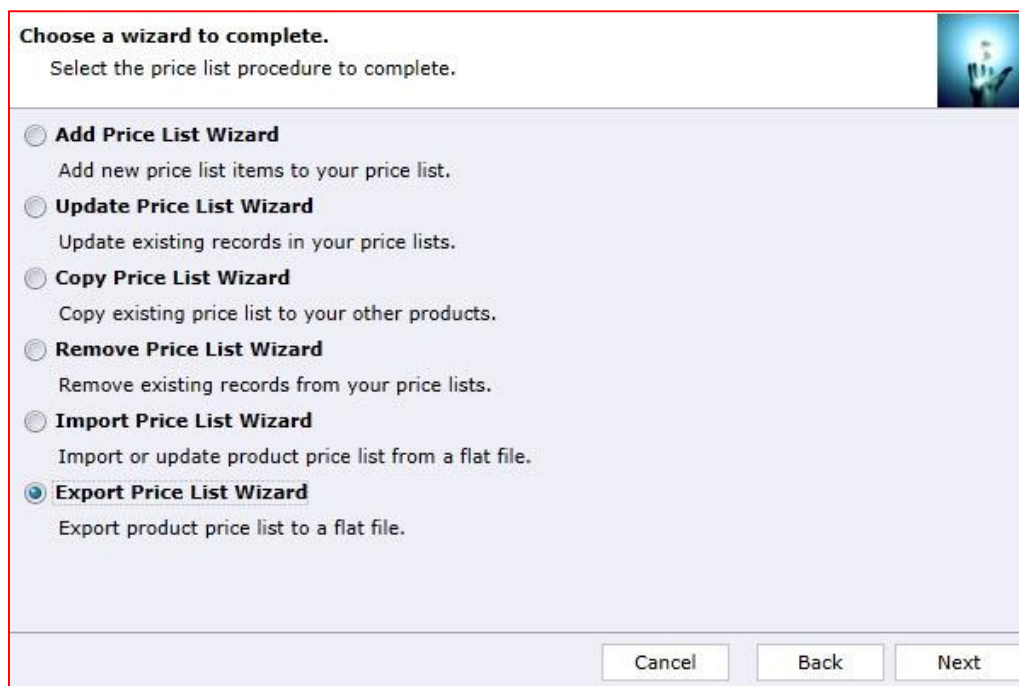
---

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

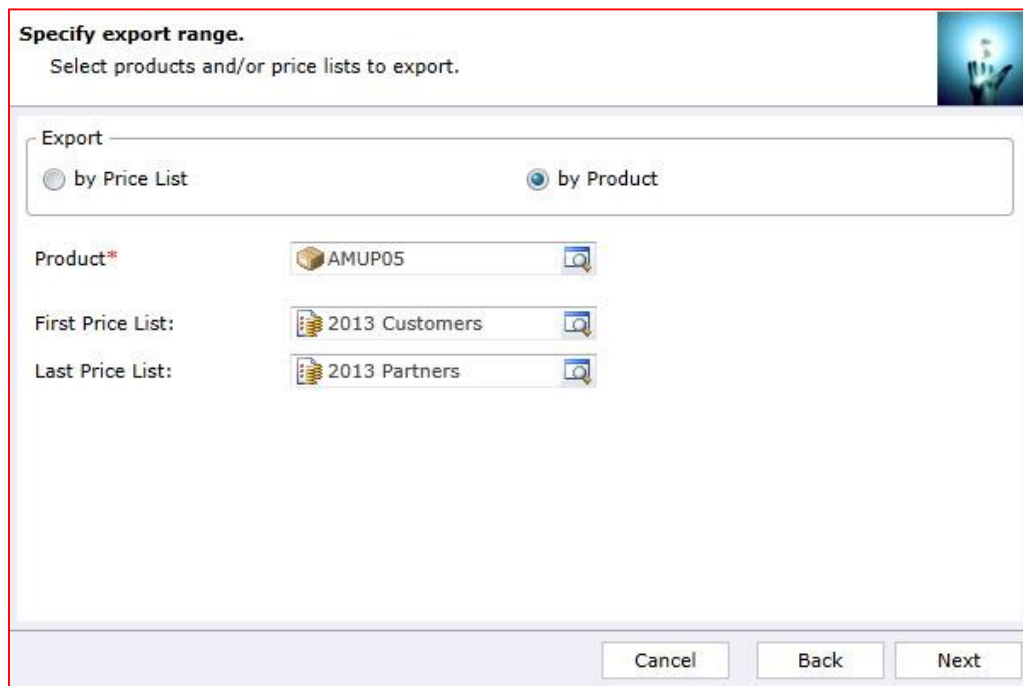
In the “Choose a wizard to complete” screen select the “Export Price List Wizard”.



Click “Next” to continue.

## 2. 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.

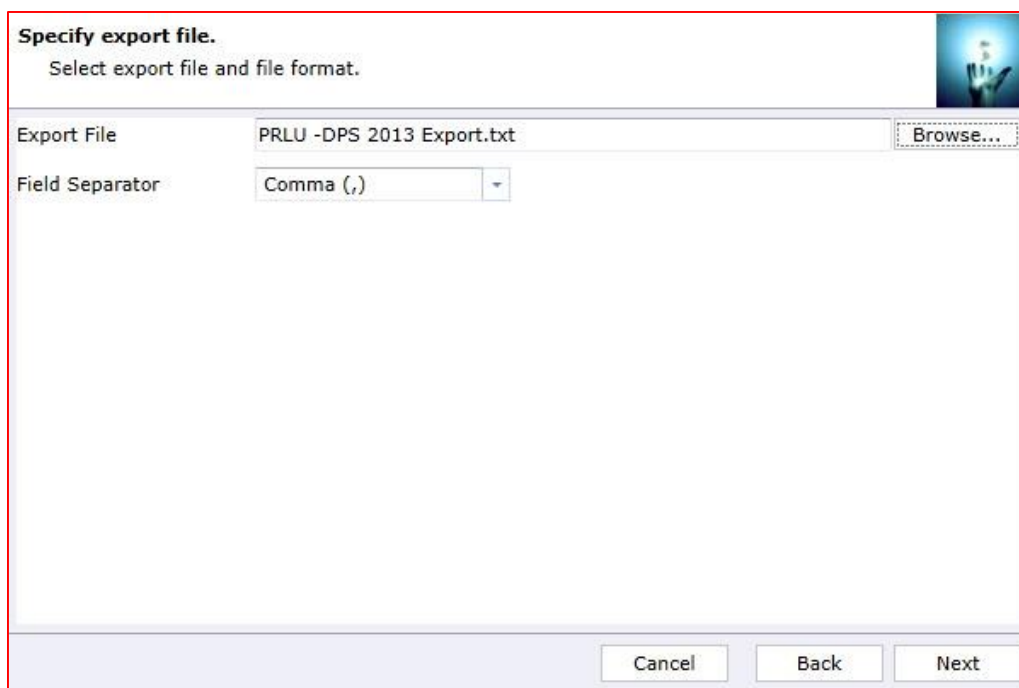


The dialog box is titled "Specify export range." with a subtitle "Select products and/or price lists to export." and a small icon of a hand holding a glowing sphere. It features two radio buttons under the heading "Export": "by Price List" (unselected) and "by Product" (selected). Below this, there are three input fields, each with a magnifying glass icon: "Product\*" contains "AMUP05", "First Price List:" contains "2013 Customers", and "Last Price List:" contains "2013 Partners". At the bottom right are three buttons: "Cancel", "Back", and "Next".

Click “Next” to continue.

## 3. 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 glowing sphere. It contains two input fields: "Export File" with the text "PRLU -DPS 2013 Export.txt" and a "Browse..." button to its right, and "Field Separator" with a dropdown menu showing "Comma (,)" and a small downward arrow. At the bottom right are three buttons: "Cancel", "Back", and "Next".

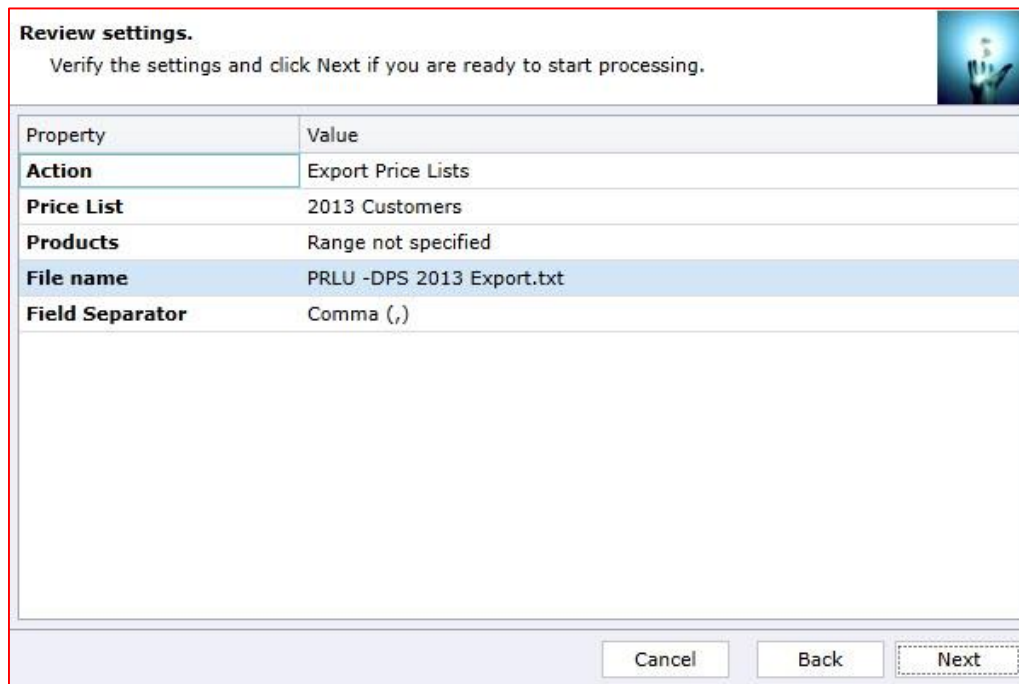
Click “Next” to continue.



#### 4. 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.

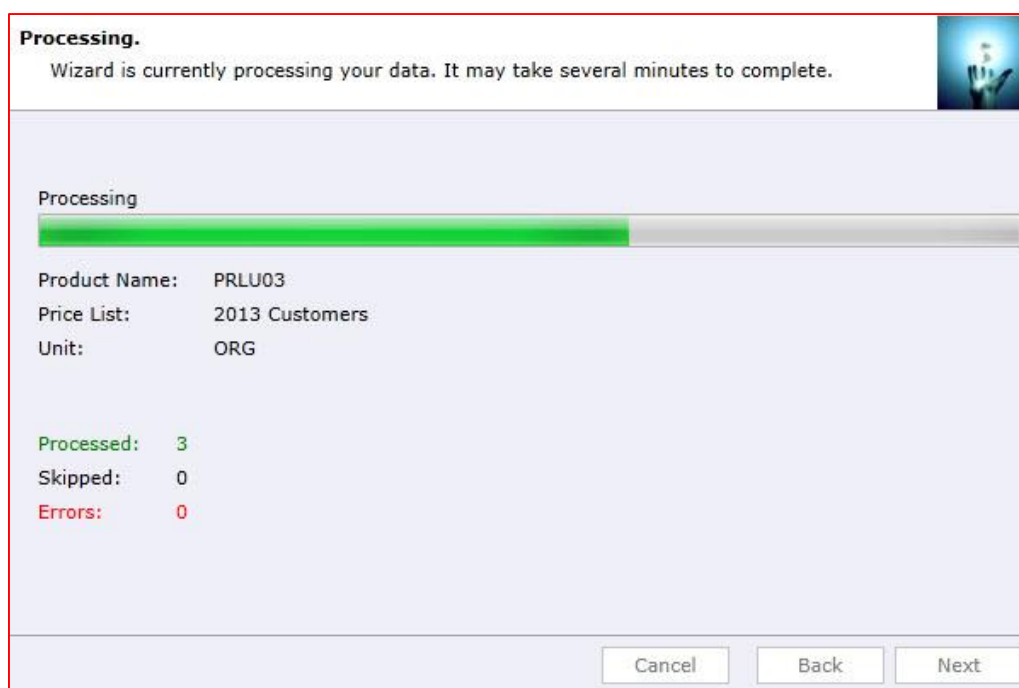
Property	Value
<b>Action</b>	Export Price Lists
<b>Price List</b>	2013 Customers
<b>Products</b>	Range not specified
<b>File name</b>	PRLU -DPS 2013 Export.txt
<b>Field Separator</b>	Comma (,)

Buttons: Cancel, Back, Next

Click “Next” to continue.

#### 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: PRLU03  
Price List: 2013 Customers  
Unit: ORG

Processed: 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.



## ***Support***

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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.

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