



# **Price List Utilities**

**For Dynamics CRM 2016**



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 or from one price list to multiple price lists**

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

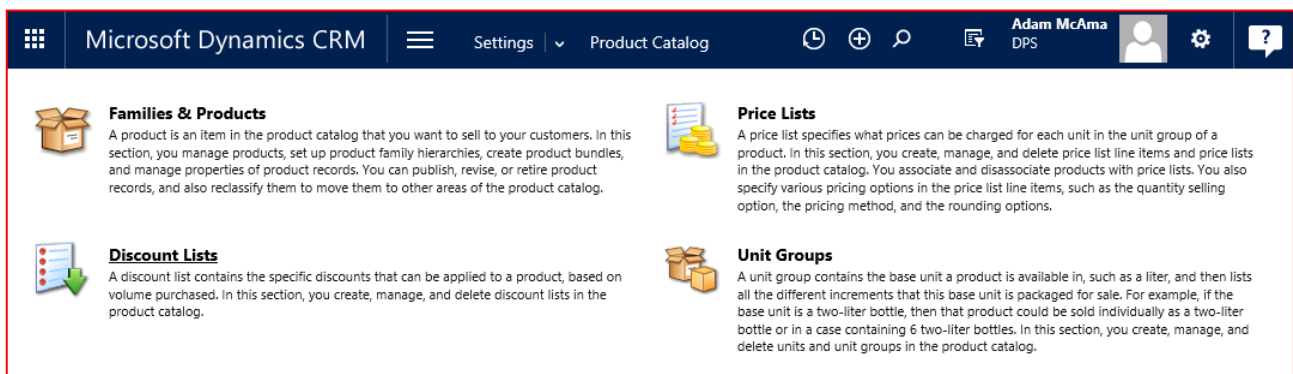
Using the wizards is straightforward, screens are easy to use and self-explanatory, but you can refer to this manual for more information when needed.

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

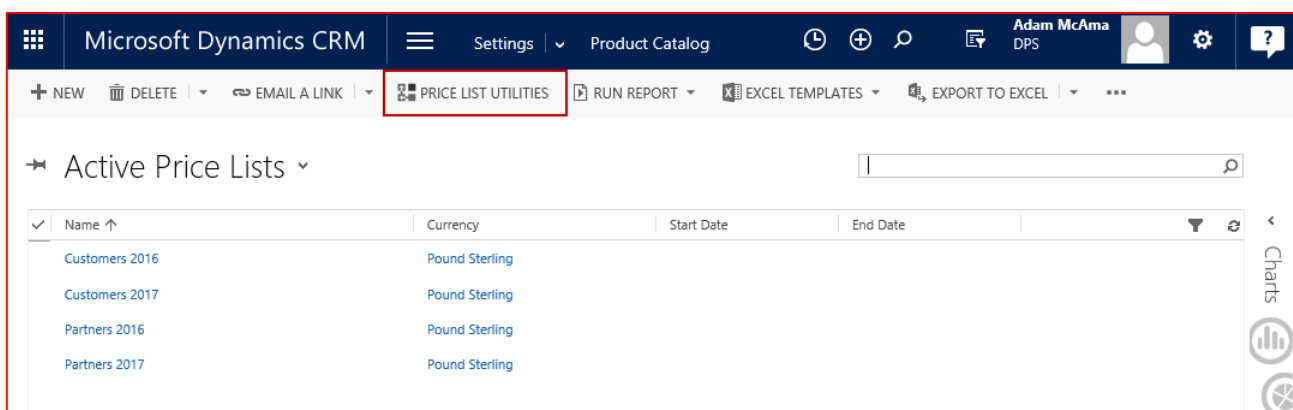
To use any of the price list wizards available in the Price List Utilities open the welcome window, navigate to the wizard selection page, and select a procedure you would like to perform. All price list wizard features begin with these steps.

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

1. Log in to Microsoft Dynamics CRM 2016
2. Price List Utilities can be generally launched from two places:
  - a. Select 'Price Lists' in the Product Catalog section in the Settings area

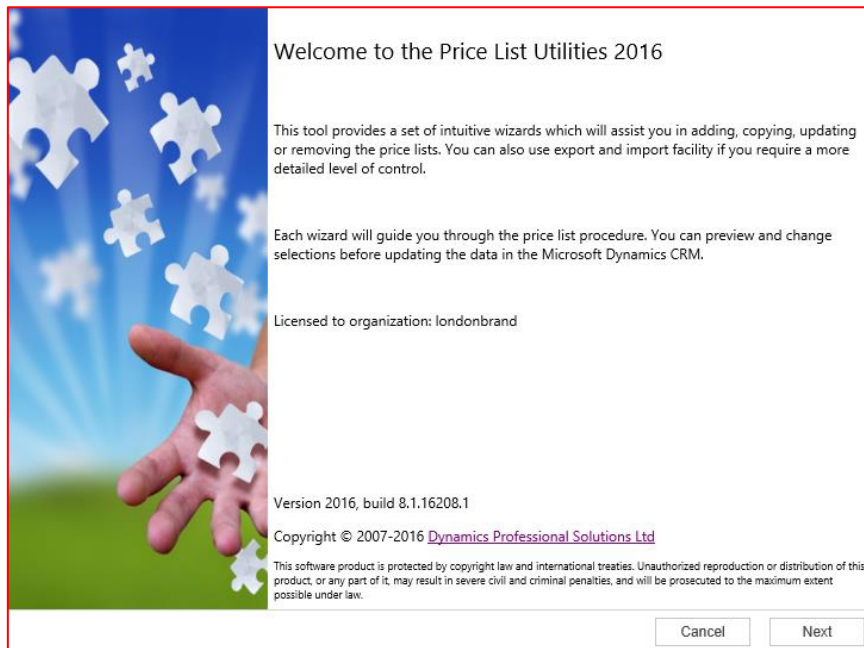


- b. Navigate to Products grid view from any location (for example Sales)
3. Click on the Price List Utilities button shown in the Ribbon



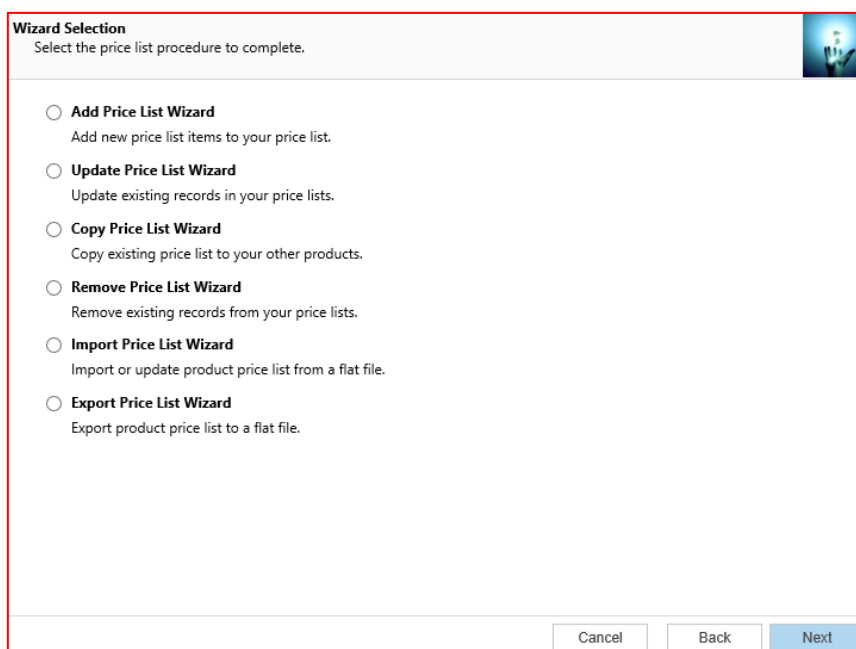
#### 4. Welcome to Price List Utilities 2016

On the Welcome to the Price List Utilities 2016 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

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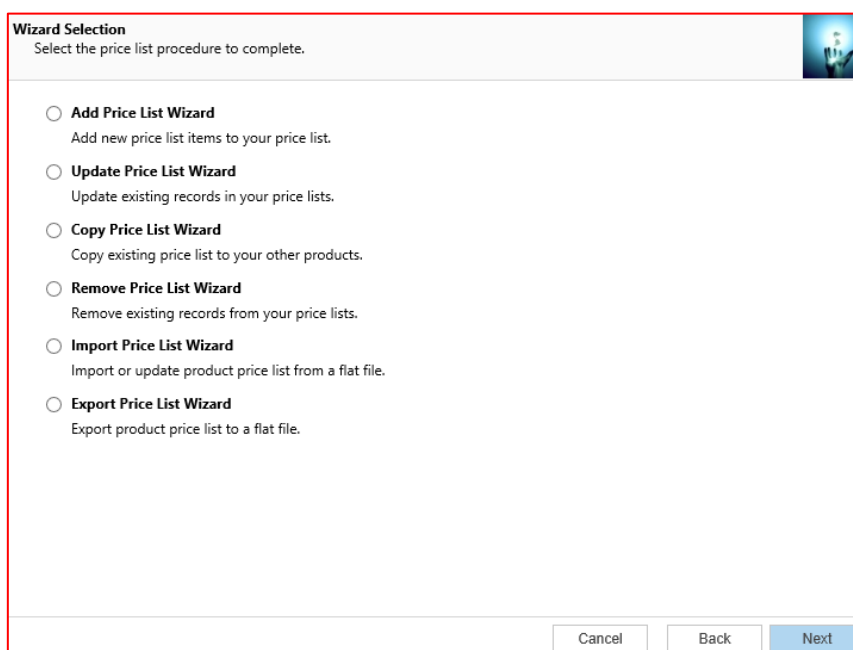
You can use this wizard to add price list item information to multiple products at once.

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 “Wizard Selection” screen select the “Add Price List Wizard”.

The screenshot shows a window titled "Wizard Selection" with a subtitle "Select the price list procedure to complete." and a small icon of a hand pointing up. The window contains a list of seven wizard options, each with a radio button and a description. The "Add Price List Wizard" is the first option. At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

**Wizard Selection**  
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.

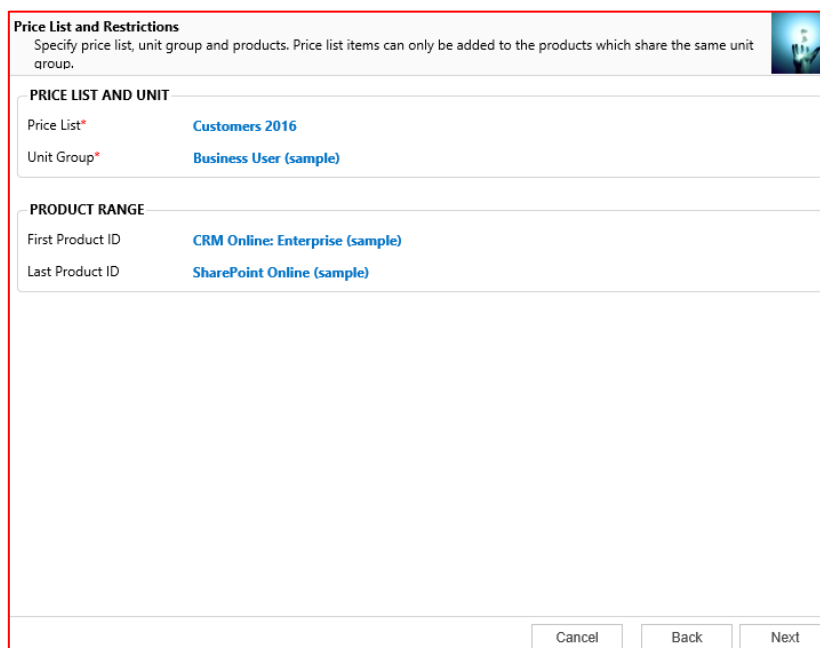
Cancel Back Next

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.



**Price List and Restrictions**  
Specify price list, unit group and products. Price list items can only be added to the products which share the same unit group.

**PRICE LIST AND UNIT**

Price List\* [Customers 2016](#)

Unit Group\* [Business User \(sample\)](#)

**PRODUCT RANGE**

First Product ID [CRM Online: Enterprise \(sample\)](#)

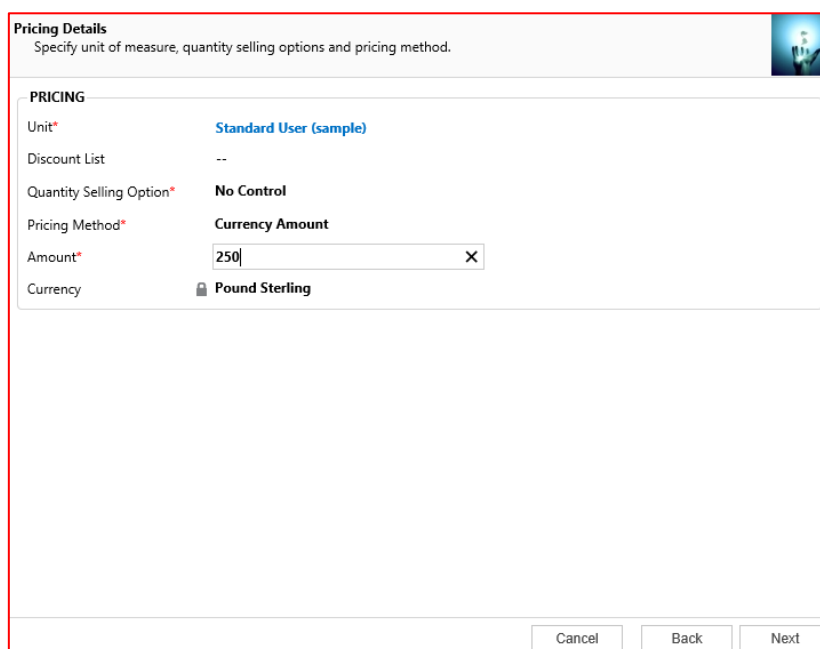
Last Product ID [SharePoint Online \(sample\)](#)

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.



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

**PRICING**

Unit\* [Standard User \(sample\)](#)

Discount List --

Quantity Selling Option\* No Control

Pricing Method\* Currency Amount

Amount\*  X

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.

**Rounding Details**  
Specify rounding policy and options.

**ROUNDING**

Rounding Policy

Up

Rounding Option\*

Ends in

Rounding Amount\*

0.05

X

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**  
Preview the records to be Added and verify your selections.

Select All

Select None

All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Exchange Online (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Lync Online (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office Desktop for Midsize & Enterprise (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office Desktop for Small Business Premium (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	SharePoint Online (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Enterprise (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Midsize (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Small Business (sample)	Customers 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 for Enterprise (sample)	Customers 2016	Standard...

<<

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1

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>>

50

items per page

1 - 15 of 15 items

Cancel

Back

Next

You can:

- use “Select All “button to quickly select records on all pages
- use “Select None” button to deselect records on all pages or mark records individually
- use filters to identify records

The screenshot shows the 'Preview' window with the title 'Preview' and subtitle 'Preview the records to be Added and verify your selections.' At the top, there are 'Select All' and 'Select None' buttons. Below them is a table with columns: Product, Price List, and Unit. The 'Product' column contains a list of products, all of which are checked. The 'Price List' column contains 'Customers 2016' for all products. The 'Unit' column contains 'Standard...' for all products. A filter dropdown menu is open over the 'Unit' column, showing 'Show items with value that:' and 'Is equal to'. The 'Filter' button is highlighted. At the bottom, there are navigation buttons: 'Cancel', 'Back', and 'Next'.

Product	Price List	Unit
CRM Online: Enterprise (sample)	Customers 2016	Standard...
CRM Online: Professional (sample)	Customers 2016	Standard...
CRM Online: Standard (sample)	Customers 2016	Standard...
Exchange Online (sample)	Customers 2016	Standard...
Lync Online (sample)	Customers 2016	Standard...
Office Desktop for Midsize & Enterprise (sample)	Customers 2016	Standard...
Office Desktop for Small Business Premium (sample)	Customers 2016	Standard...
SharePoint Online (sample)	Customers 2016	Standard...
Office 365 and CRM Online: Enterprise (sample)	Customers 2016	Standard...
Office 365 and CRM Online: Midsize (sample)	Customers 2016	Standard...
Office 365 and CRM Online: Small Business (sample)	Customers 2016	Standard...
Office 365 for Enterprise (sample)	Customers 2016	Standard...

Click “Next” to continue.

## 6. Review the settings

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

The screenshot shows the 'Review' window with the title 'Review' and subtitle 'Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.' Below the subtitle is a table with two columns: 'Setting' and 'Value'. The table contains the following settings and values:

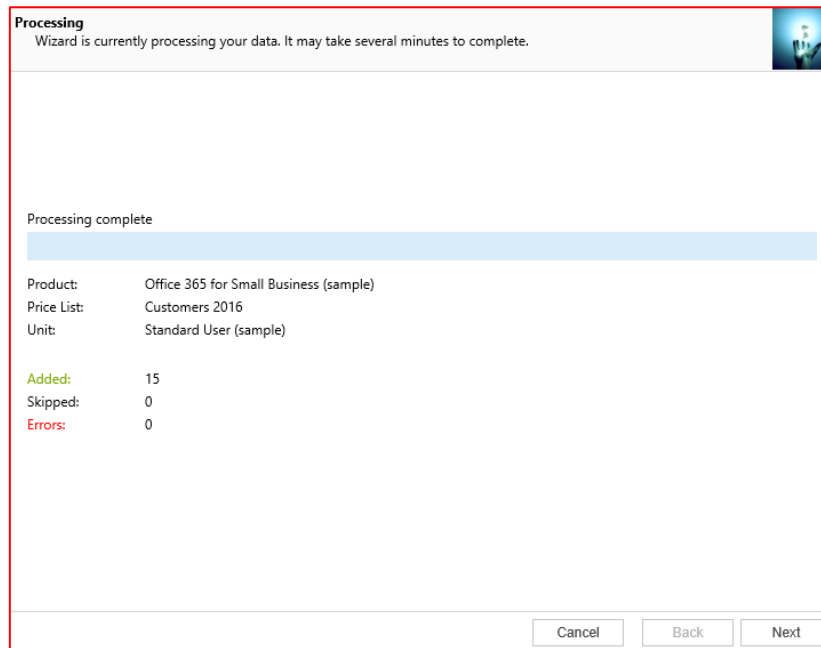
Setting	Value
Action	Add Price List
Price List	Customers 2016
Unit Group	Business User (sample)
Products	CRM Online: Enterprise (sample) : SharePoint Online (sample)
Price List Items to Add	15
Unit	Standard User (sample)
Discount List	Not Specified
Quantity Selling Option	No Control
Pricing Method	Currency Amount
Amount	250.00

At the bottom, there are navigation buttons: 'Cancel', 'Back', and 'Next'.

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.



The screenshot shows a window titled "Processing" with a subtitle "Wizard is currently processing your data. It may take several minutes to complete." Below this is a large blue progress bar labeled "Processing complete". To the right of the progress bar is a small icon of a hand holding a glowing sphere. Below the progress bar, the following information is displayed:

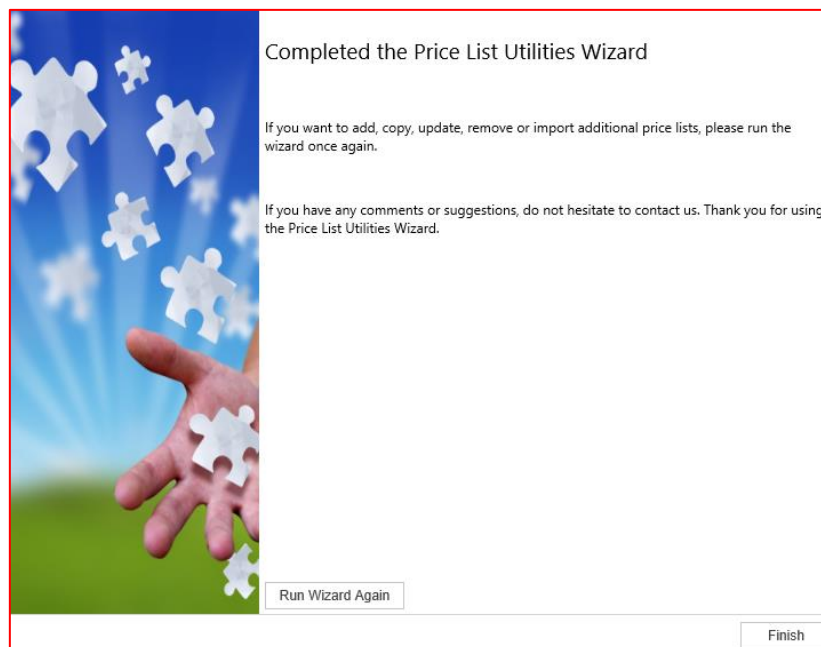
Product:	Office 365 for Small Business (sample)
Price List:	Customers 2016
Unit:	Standard User (sample)
Added:	15
Skipped:	0
Errors:	0

At the bottom of the window are three buttons: "Cancel", "Back", and "Next".

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.



The screenshot shows a window titled "Completed the Price List Utilities Wizard". On the left side is a large image of a hand holding several white puzzle pieces against a blue sky with green grass at the bottom. The main text area contains the following information:

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.

At the bottom of the window are two buttons: "Run Wizard Again" and "Finish".

## Chapter 3: Updating price list items for multiple products

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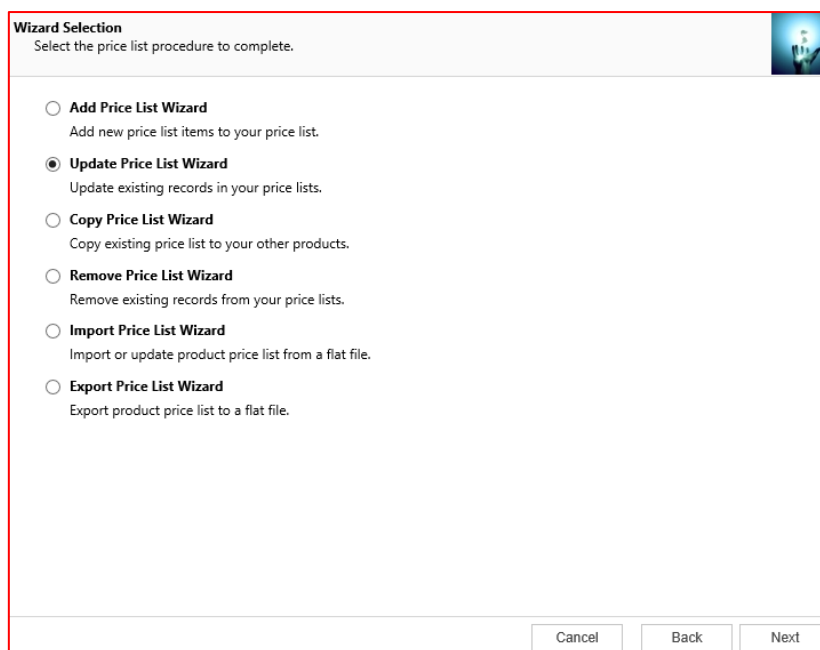
You can use this wizard to update price list item information for multiple products at once.

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 “Wizard Selection” screen select the “Update Price List Wizard”.

The screenshot shows a window titled "Wizard Selection" with a subtitle "Select the price list procedure to complete." In the top right corner, there is a small icon of a hand pointing up. The main area contains a list of six wizard options, each with a radio button and a description. The "Update Price List Wizard" is selected, indicated by a filled radio button. At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

**Wizard Selection**  
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.

**Price Lists and Restrictions**  
Specify pricing method, price list and products to update. Only items with the same pricing method can only be updated at the same time.

**PRICE LIST RANGE**  
First Price List **Customers 2016**  
Last Price List **Customers 2017**

**PRODUCT RANGE**  
First Product ID   
Last Product ID

Pricing Method\* **Currency Amount**

Cancel

Back

Next

Click “Next” to continue.

## 3. Specify update details

Indicate how the price list information should be updated.

**Pricing Details**  
Specify how to update the pricing details. The update type depends on the pricing method.

**UPDATE BY**  
☒ Percentage  
☐ Fixed Value

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

Amount (%)\* **7.50000**

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**  
Preview the records to be Updated and verify your selections.

Select AllSelect NoneAll items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit	Current	Updated
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Exchange Online (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Lync Online (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	SharePoint Online (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office Desktop for Small Business Premium (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office Desktop for Midsize & Enterprise (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Enterprise (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Midsize (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Small Business (sample)	Customers 2016	Standard...	250.00	268.75
<input checked="" type="checkbox"/>	Office 365 for Enterprise (sample)	Customers 2016	Standard...	250.00	268.75

<<<1>>>

50 items per page

1 - 15 of 15 items

Cancel

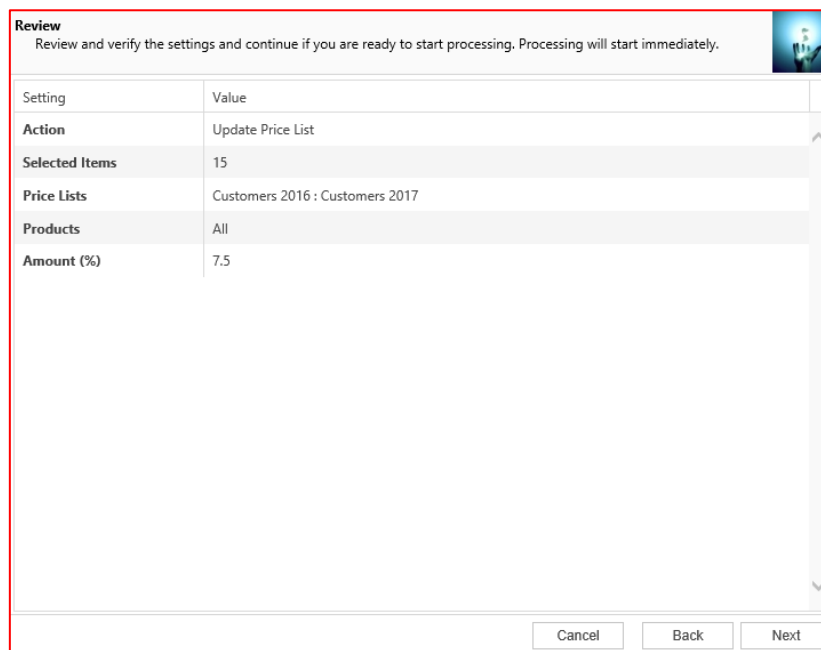
Back

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.

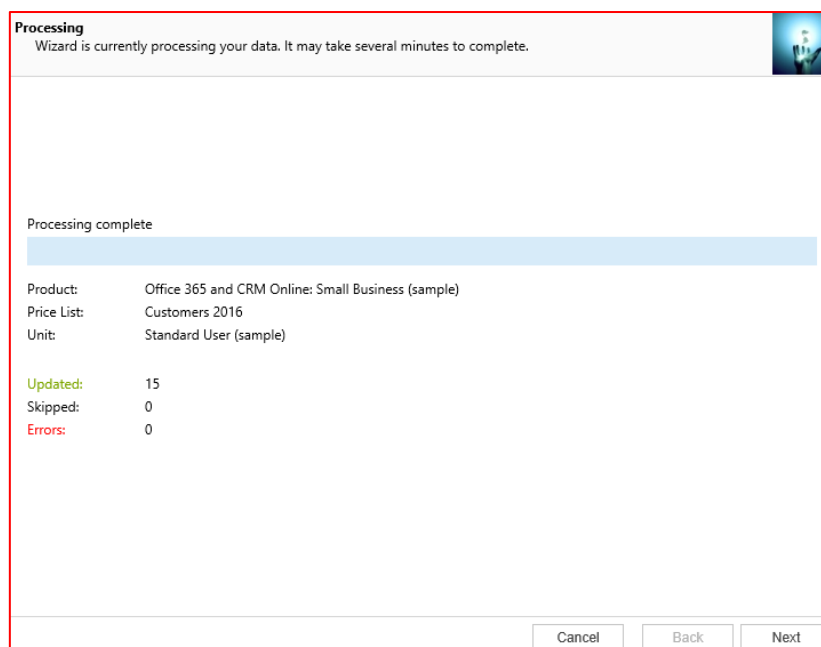


Setting	Value
Action	Update Price List
Selected Items	15
Price Lists	Customers 2016 : Customers 2017
Products	All
Amount (%)	7.5

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 complete

Product: Office 365 and CRM Online: Small Business (sample)  
Price List: Customers 2016  
Unit: Standard User (sample)

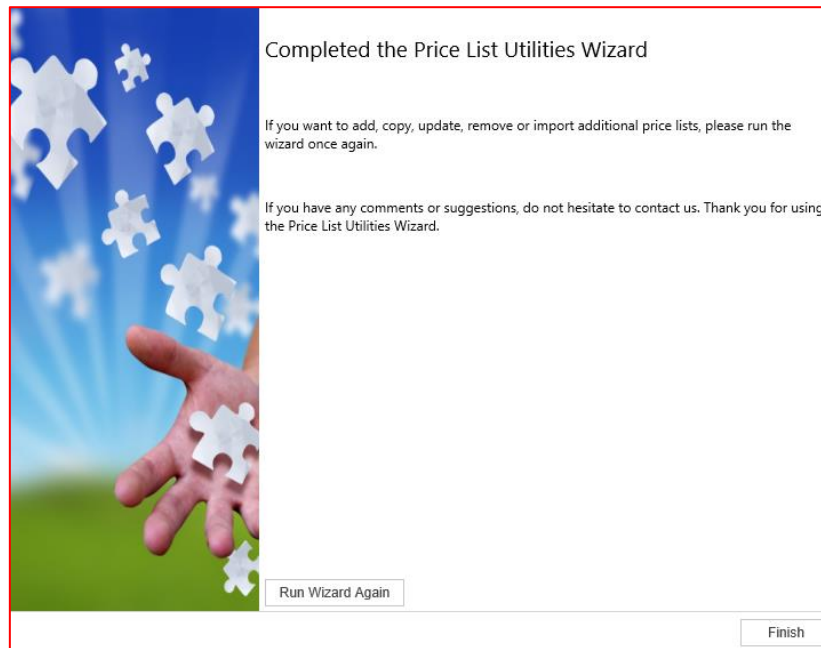
Updated: 15  
Skipped: 0  
Errors: 0

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



## 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

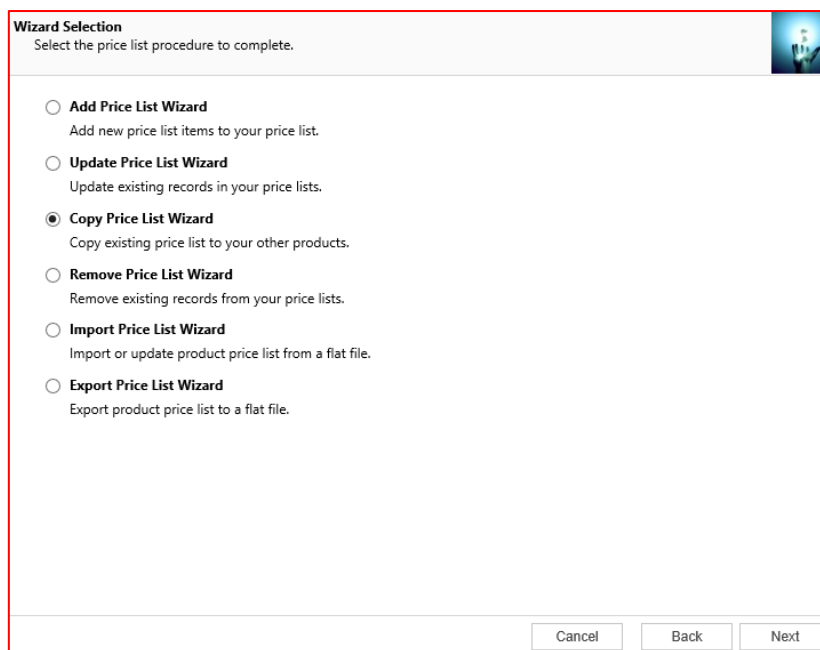
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You can use this wizard to copy price list item information from one product (selected template product) to multiple products at once.

### To copy price list items to multiple products:

#### 1. Choose a wizard

In the “Wizard Selection” screen select the “Copy Price List Wizard”.



The screenshot shows a dialog box titled "Wizard Selection" with the instruction "Select the price list procedure to complete." There is a small icon of a hand pointing at a lightbulb in the top right corner. The dialog lists six options, each with a radio button and a description:

- ☐ **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.

At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

Click “Next” to continue.

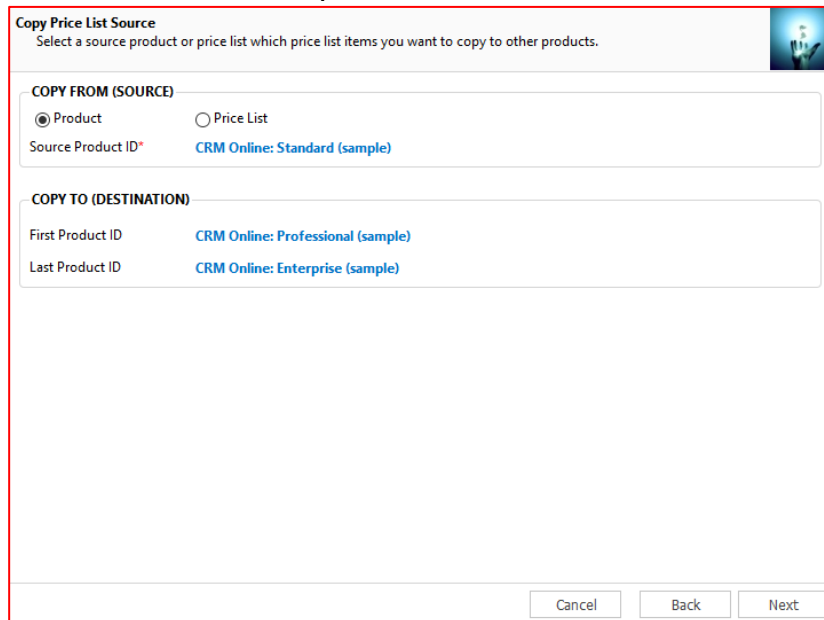
## 2. Select source product and restrictions

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 copying from Product Price List:

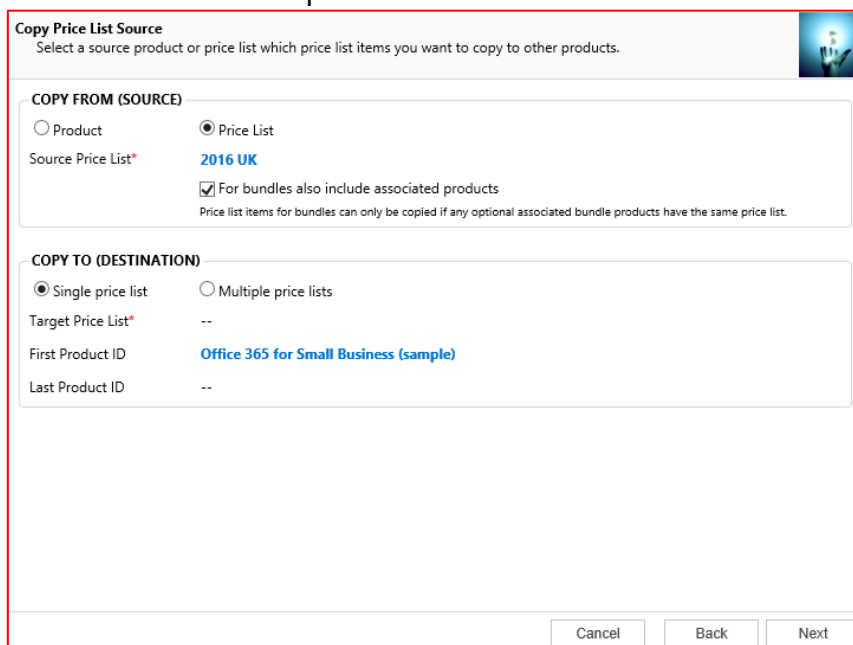
- Select a source product you want to copy price list information from. This is the product which pricing information will be used as a template.
- Specify products you would like to copy price list items to. “From” and/or “To” can be empty. If range is not specified at all it means all products.



The screenshot shows the 'Copy Price List Source' dialog box. The title bar says 'Copy Price List Source' and the subtitle is 'Select a source product or price list which price list items you want to copy to other products.' There is a small icon of a hand pointing up in the top right corner. The dialog is divided into two main sections: 'COPY FROM (SOURCE)' and 'COPY TO (DESTINATION)'. In the 'COPY FROM (SOURCE)' section, the 'Product' radio button is selected, and the 'Source Product ID' is 'CRM Online: Standard (sample)'. In the 'COPY TO (DESTINATION)' section, the 'First Product ID' is 'CRM Online: Professional (sample)' and the 'Last Product ID' is 'CRM Online: Enterprise (sample)'. At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Next'.

When copying 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. You can also select multiple price lists.
- Optionally limit products you want to include in target price list.
- For bundles you can request to automatically copy any optional bundle products that are not already included in the destination price list.



The screenshot shows the 'Copy Price List Source' dialog box. The title bar says 'Copy Price List Source' and the subtitle is 'Select a source product or price list which price list items you want to copy to other products.' There is a small icon of a hand pointing up in the top right corner. The dialog is divided into two main sections: 'COPY FROM (SOURCE)' and 'COPY TO (DESTINATION)'. In the 'COPY FROM (SOURCE)' section, the 'Price List' radio button is selected, and the 'Source Price List' is '2016 UK'. There is a checkbox 'For bundles also include associated products' which is checked. Below it, a note says 'Price list items for bundles can only be copied if any optional associated bundle products have the same price list.' In the 'COPY TO (DESTINATION)' section, the 'Single price list' radio button is selected, and the 'Target Price List' is '--'. The 'First Product ID' is 'Office 365 for Small Business (sample)' and the 'Last Product ID' is '--'. At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Next'.

Click “Next” to continue.

### 3. In “Target Price List” review destination pricelist.

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

Price List
<input checked="" type="checkbox"/> Partners 2016
<input checked="" type="checkbox"/> Partners 2017

Click “Next” to continue.

### 4. Review the records to be processed

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

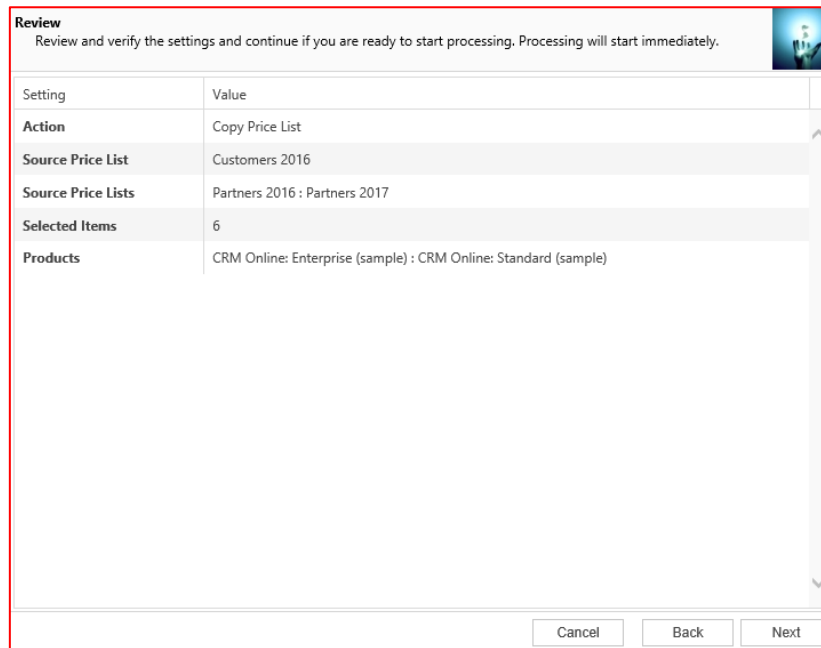
Product	Price List	Unit
<input checked="" type="checkbox"/> CRM Online: Professional (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/> CRM Online: Professional (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/> CRM Online: Standard (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/> CRM Online: Standard (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/> CRM Online: Enterprise (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/> CRM Online: Enterprise (sample)	Partners 2017	Standard...

Please note that “Select All” button selects all items across all pages, while “Select None” deselects them all. You can select/deselect items within currently displayed page only using checkboxes, but please note that the checkbox in the header works for the currently displayed page only.

Click “Next” to continue.

## 5. Review the settings

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

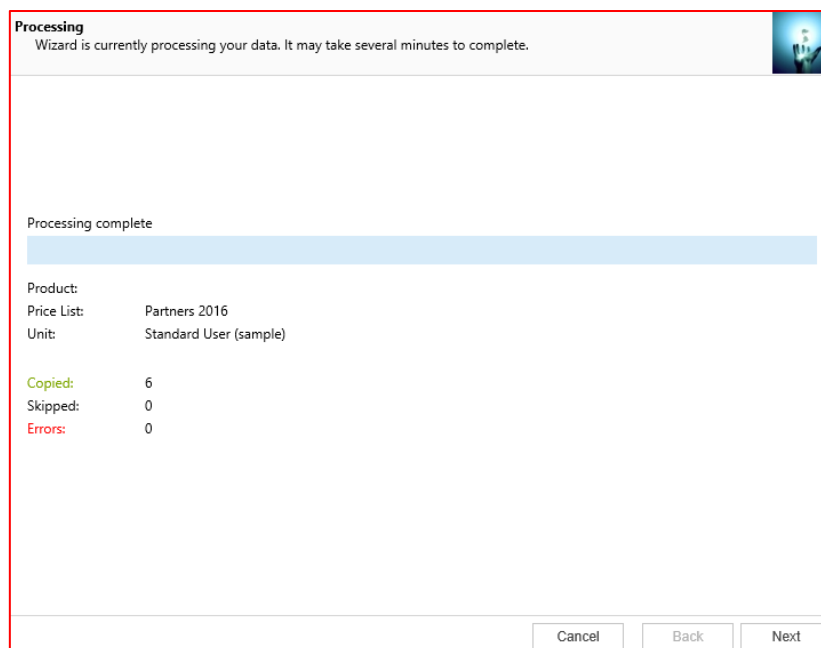


Setting	Value
Action	Copy Price List
Source Price List	Customers 2016
Source Price Lists	Partners 2016 : Partners 2017
Selected Items	6
Products	CRM Online: Enterprise (sample) : CRM Online: Standard (sample)

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

## 6. Processing

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



Processing complete

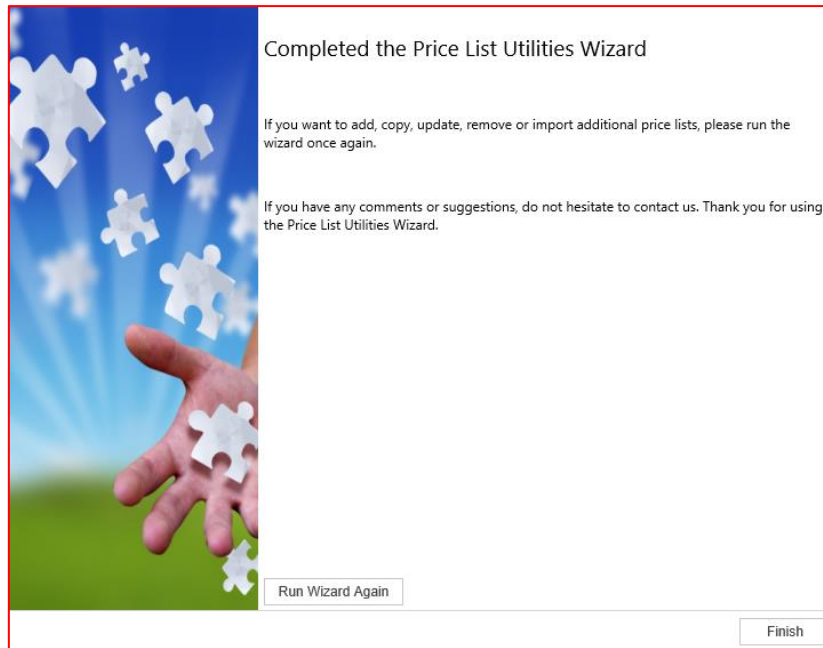
Product: Partners 2016  
Price List: Standard User (sample)  
Unit: Standard User (sample)

Copied: 6  
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.

## 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

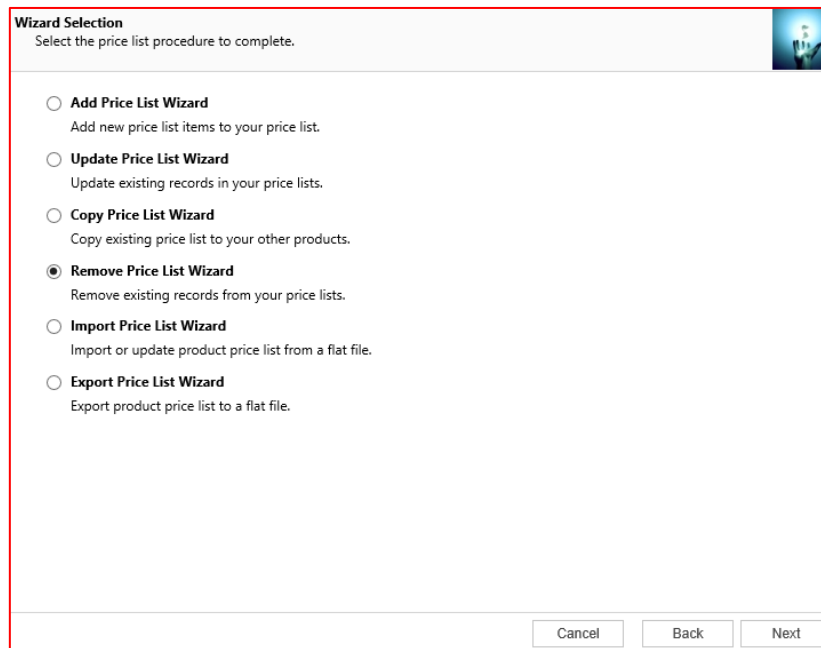
Finish

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 “Wizard Selection” screen select the “Remove Price List Wizard”.

The screenshot shows a window titled "Wizard Selection" with a subtitle "Select the price list procedure to complete." In the top right corner, there is a small icon of a person with a lightbulb above their head. The main area contains a list of six wizard options, each with a radio button and a description. The "Remove Price List Wizard" is selected, indicated by a filled radio button. At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

**Wizard Selection**  
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.

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

**PRICE LIST RANGE**  
First Price List **Partners 2016**  
Last Price List **Partners 2017**

**PRODUCT RANGE**  
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**  
Preview the records to be Removed and verify your selections.

Select All Select None All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	CRM Online: Professional (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/>	CRM Online: Enterprise (sample)	Partners 2017	Standard...
<input checked="" type="checkbox"/>	CRM Online: Standard (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Lync Online (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Office Desktop for Midsize & Enterprise (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Office Desktop for Small Business Premium (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	SharePoint Online (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Exchange Online (sample)	Partners 2016	Standard...
<input checked="" type="checkbox"/>	Office 365 and CRM Online: Enterprise (sample)	Partners 2016	Standard...

< < 1 > > 50 items per page 1 - 18 of 18 items

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**  
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.

Setting	Value
Action	Remove Price List
Selected Items	18
Price Lists	Partners 2016 : Partners 2017
Products	All

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 complete

Product:

Price List:

Unit:

Removed:

Skipped:

Errors:

Exchange Online (sample)

Partners 2016

Standard User (sample)

18

0

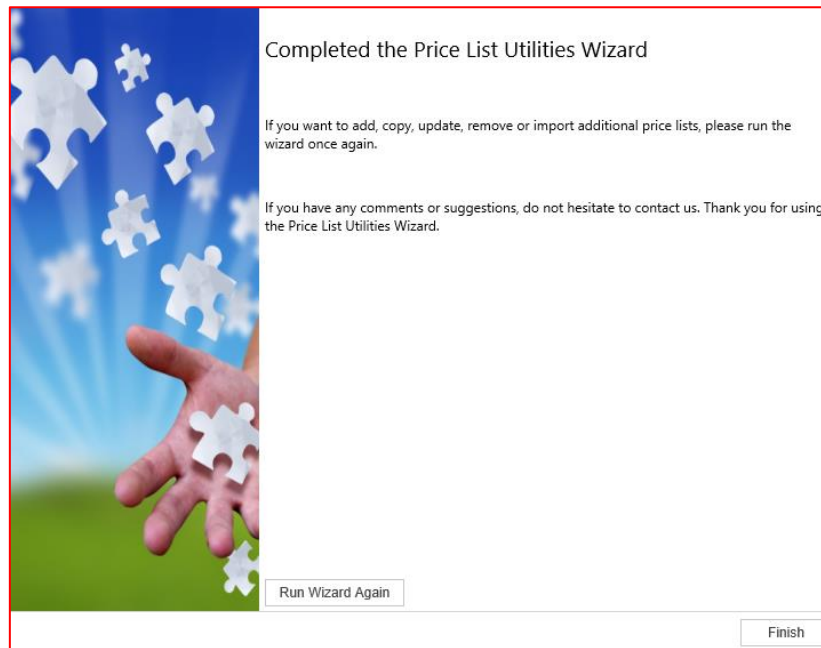
0

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.



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

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

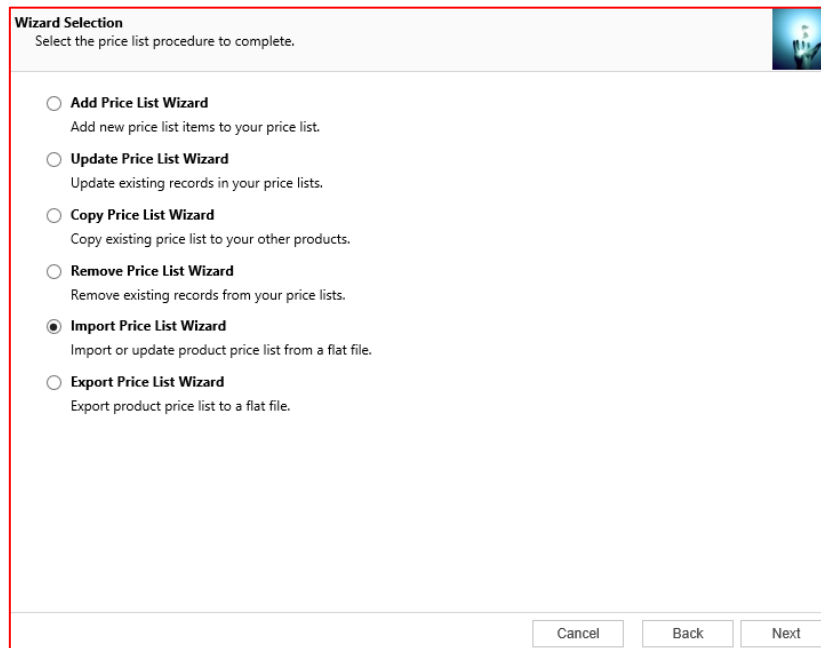
Requirements for the successful import or update:

- 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 “Wizard Selection” screen select the “Import Price List Wizard”.



**Wizard Selection**  
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.

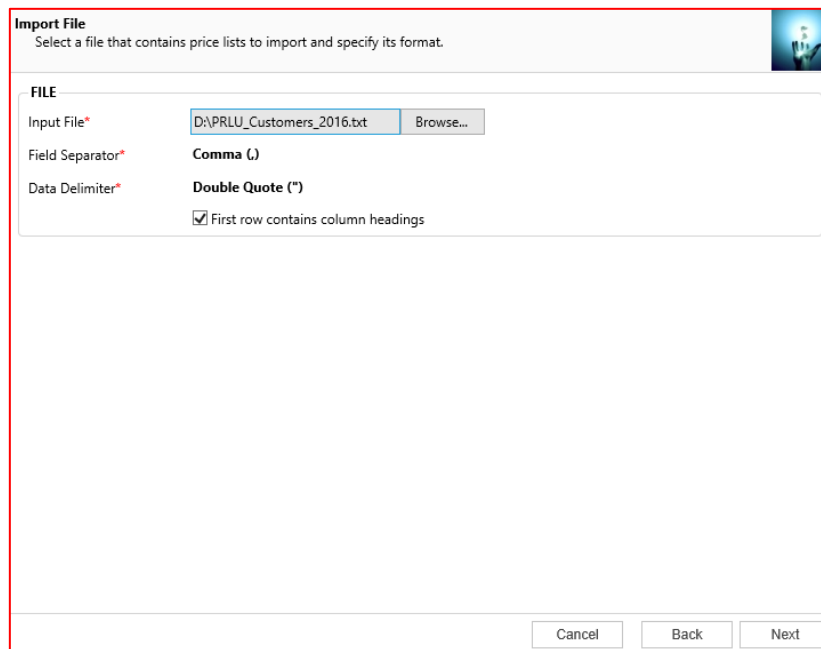
☐ **Export Price List Wizard**  
Export product price list to a flat file.

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



**Import File**  
Select a file that contains price lists to import and specify its format.

**FILE**

Input File\*  Browse...

Field Separator\* **Comma (,)**

Data Delimiter\* **Double Quote (")**

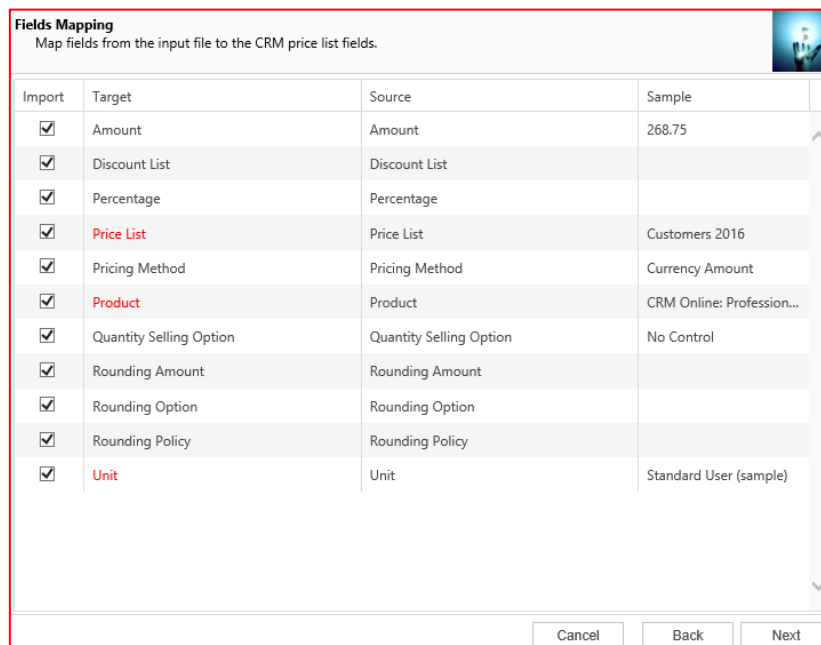
☒ First row contains column headings

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.



**Fields Mapping**  
Map fields from the input file to the CRM price list fields.

Import	Target	Source	Sample
<input checked="" type="checkbox"/>	Amount	Amount	268.75
<input checked="" type="checkbox"/>	Discount List	Discount List	
<input checked="" type="checkbox"/>	Percentage	Percentage	
<input checked="" type="checkbox"/>	<b>Price List</b>	Price List	Customers 2016
<input checked="" type="checkbox"/>	Pricing Method	Pricing Method	Currency Amount
<input checked="" type="checkbox"/>	<b>Product</b>	Product	CRM Online: Profession...
<input checked="" type="checkbox"/>	Quantity Selling Option	Quantity Selling Option	No Control
<input checked="" type="checkbox"/>	Rounding Amount	Rounding Amount	
<input checked="" type="checkbox"/>	Rounding Option	Rounding Option	
<input checked="" type="checkbox"/>	Rounding Policy	Rounding Policy	
<input checked="" type="checkbox"/>	<b>Unit</b>	Unit	Standard User (sample)

Cancel Back Next

Click “Next” to continue.

#### 4. Input file preview

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

Import File Preview						
Preview the lines to be imported.						
Amount	Discount List	Percent...	Price List	Pricing Method	Product	Quantity Se
268.75			Customers 2016	Currency Amount	CRM Online: Professional (sample)	No Control
268.75			Customers 2016	Currency Amount	Exchange Online (sample)	No Control
268.75			Customers 2016	Currency Amount	Lync Online (sample)	No Control
268.75			Customers 2016	Currency Amount	CRM Online: Standard (sample)	No Control
268.75			Customers 2016	Currency Amount	CRM Online: Enterprise (sample)	No Control
268.75			Customers 2016	Currency Amount	SharePoint Online (sample)	No Control
268.75			Customers 2016	Currency Amount	Office Desktop for Small Business Premium (sample)	No Control
					Office Desktop for	
<div>&lt; 1 50 items per page 1 - 15 of 15 items</div>						
				Cancel	Back	Next

Click “Next” to continue.

#### 5. Review the settings

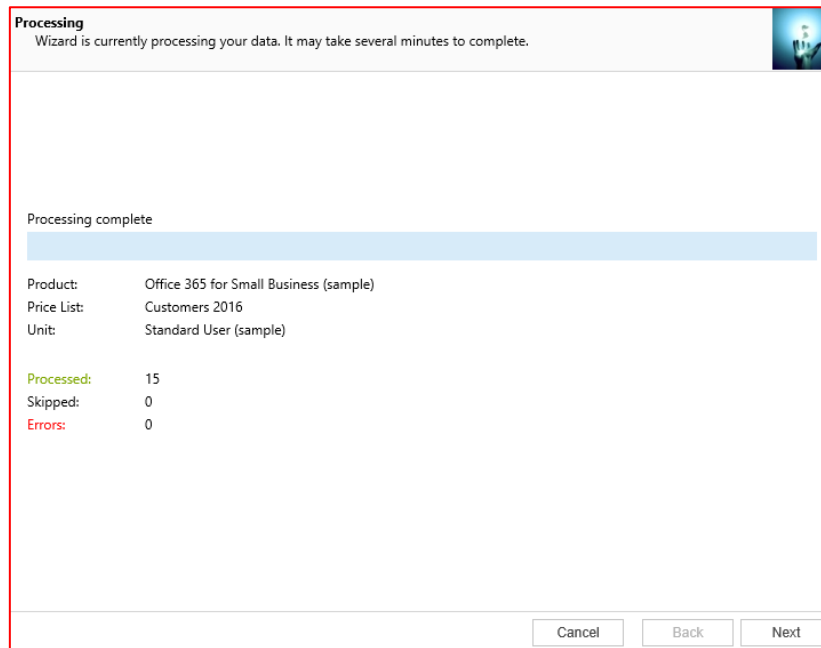
Verify the settings you have selected. Use “Back” button if you wish to make any changes.

Review	
Review and verify the settings and continue if you are ready to start processing. Processing will start immediately.	
Setting	Value
Action	Import Price List
File Name	PRLU_Customers_2016.txt
Selected Items	15
<div>Cancel Back Next</div>	

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.



The screenshot shows a window titled "Processing" with a status bar indicating "Wizard is currently processing your data. It may take several minutes to complete." Below this, a blue bar indicates "Processing complete". The window displays the following information:

Product:	Office 365 for Small Business (sample)
Price List:	Customers 2016
Unit:	Standard User (sample)

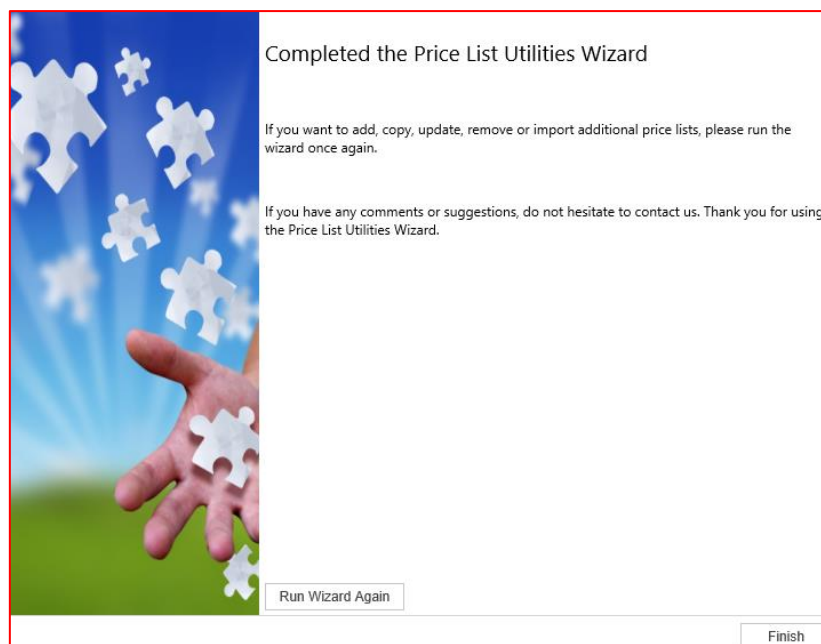
Processed:	15
Skipped:	0
Errors:	0

At the bottom right, there are three buttons: "Cancel", "Back", and "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.



The screenshot shows a window titled "Completed the Price List Utilities Wizard". On the left side, there is an image of a hand holding several white puzzle pieces against a blue sky with green grass at the bottom. The text on the right side of the window reads:

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.

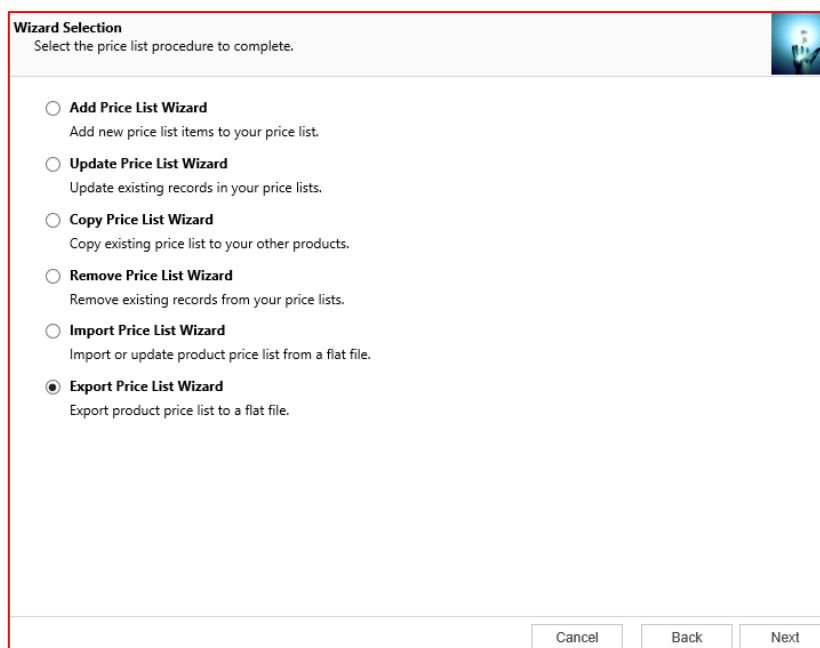
At the bottom, there are two buttons: "Run Wizard Again" and "Finish".

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 “Wizard Selection” screen select the “Export Price List Wizard”.

The image shows a 'Wizard Selection' dialog box with a title bar and a close button. The main area contains a list of six wizard options, each with a radio button and a description. The 'Export Price List Wizard' is selected with a filled radio button. At the bottom right, there are three buttons: 'Cancel', 'Back', and 'Next'.

**Wizard Selection**  
Select the price list procedure to complete.

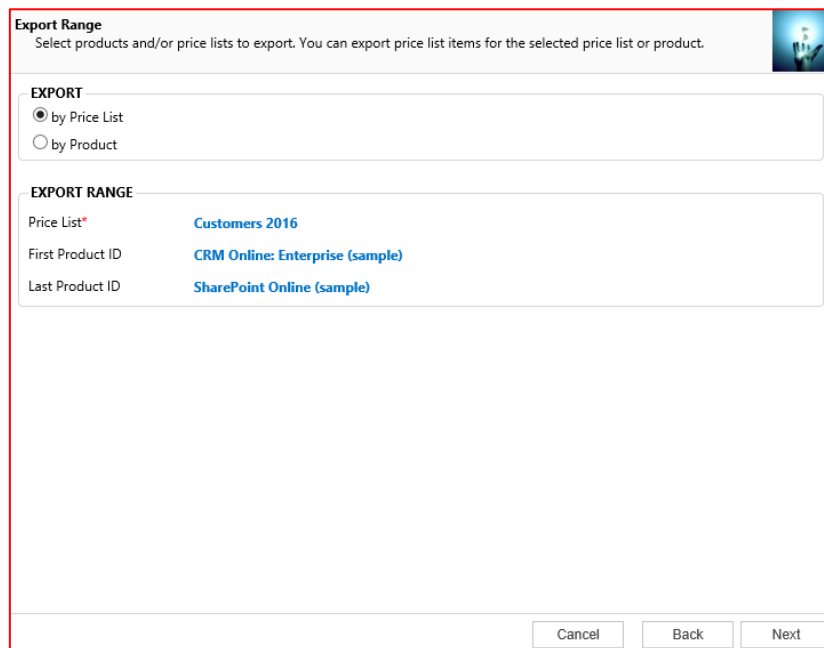
- ☐ **Add Price List Wizard**  
Add new price list items to your price list.
- ☐ **Update Price List Wizard**  
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**  
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**  
Remove existing records from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



**Export Range**  
Select products and/or price lists to export. You can export price list items for the selected price list or product.

**EXPORT**

☒ by Price List  
☐ by Product

**EXPORT RANGE**

Price List\* [Customers 2016](#)

First Product ID [CRM Online: Enterprise \(sample\)](#)

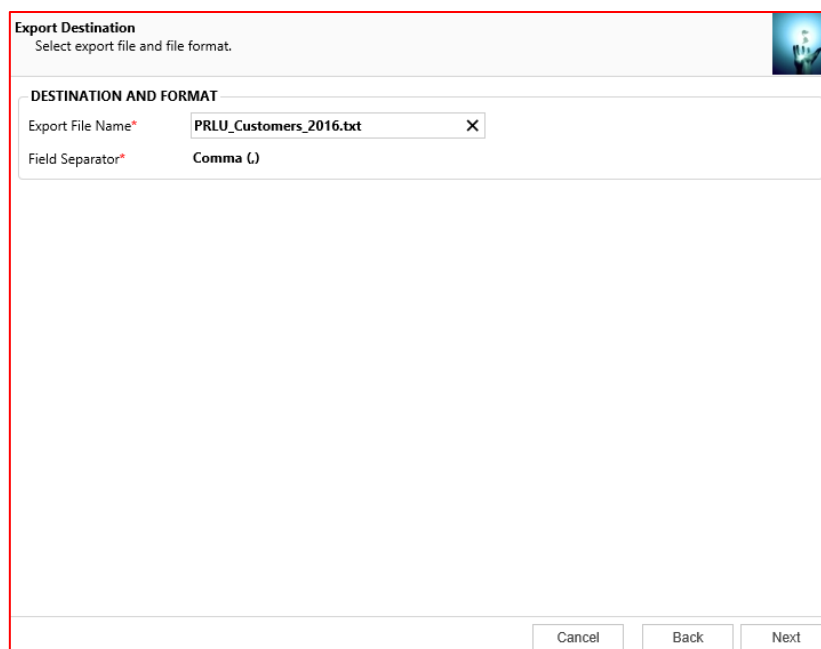
Last Product ID [SharePoint Online \(sample\)](#)

Cancel Back Next

Click “Next” to continue.

## 3. Specify export file.

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



**Export Destination**  
Select export file and file format.

**DESTINATION AND FORMAT**

Export File Name\*  X

Field Separator\*

Cancel Back 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

Setting	Value
Action	Export Price List
Price List	Customers 2016
Products	CRM Online: Enterprise (sample) : SharePoint Online (sample)
File Name	PRLU_Customers_2016.txt
Field Separator	Comma (,)

Click “Next” to continue.

#### 5. Processing

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

Processing complete

Exported:	15
Skipped:	0
Errors:	0

PRLU\_Customers\_2016.txt (2.41 KB) londonbrand.crm4.dynamics.com

Open Save Cancel

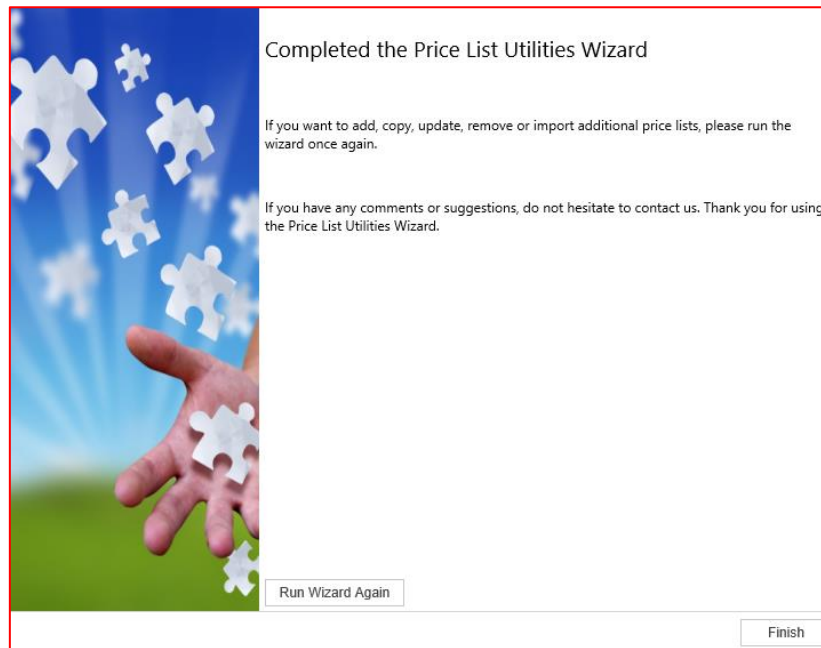
Next

Save the export file when asked.

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.

**Support:**

<http://www.dynamics-pros.com/support>

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