



Price List Utilities

For Dynamics 365 v 9.x



User Guide

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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 Dynamics 365. 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.

➤ **Setting Default Price List for a product**

This section will guide you through the setting a product Default Price List procedure.

Functionality

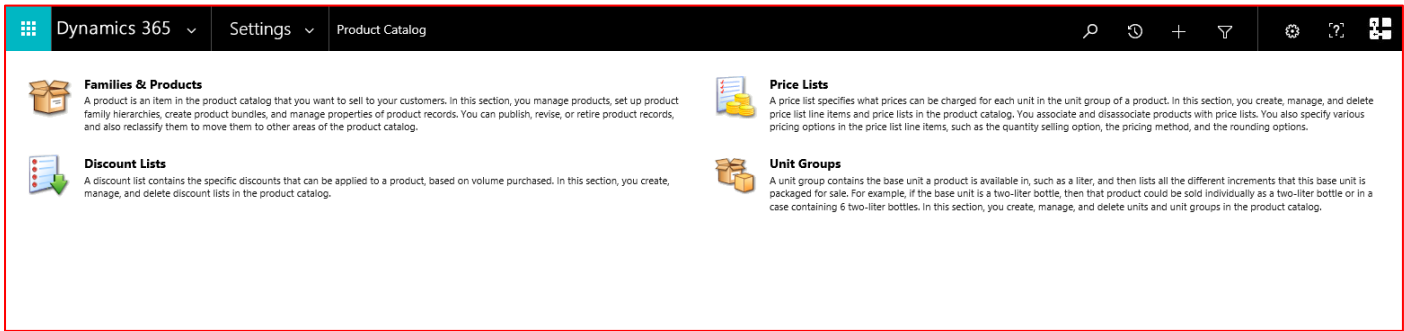
Using the wizards is straightforward, screens are easy to use and self-explanatory, but you can refer to this manual for more information when needed.

Chapter 1: Getting started with the price list wizards

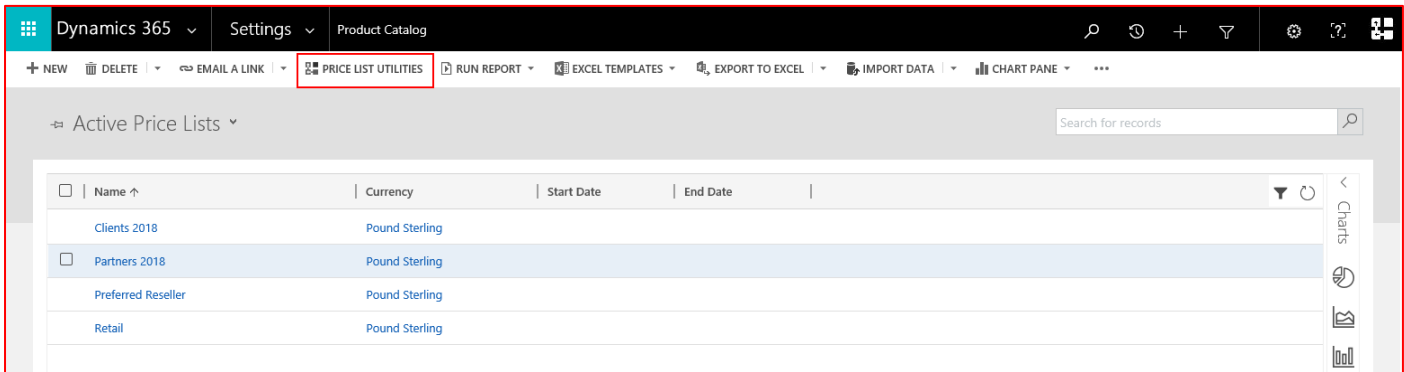
To use any of the price list wizards available in the Price List Utilities open the welcome window, navigate to the wizard selection page, and select a procedure you would like to perform. All price list wizard features begin with these steps.

To get started with a price list wizard:

- 1. Log in to Microsoft Dynamics 365
- 2. Price List Utilities can be generally launched from two places:
 - a. Select ‘Price Lists’ in the Product Catalog section in the Settings area

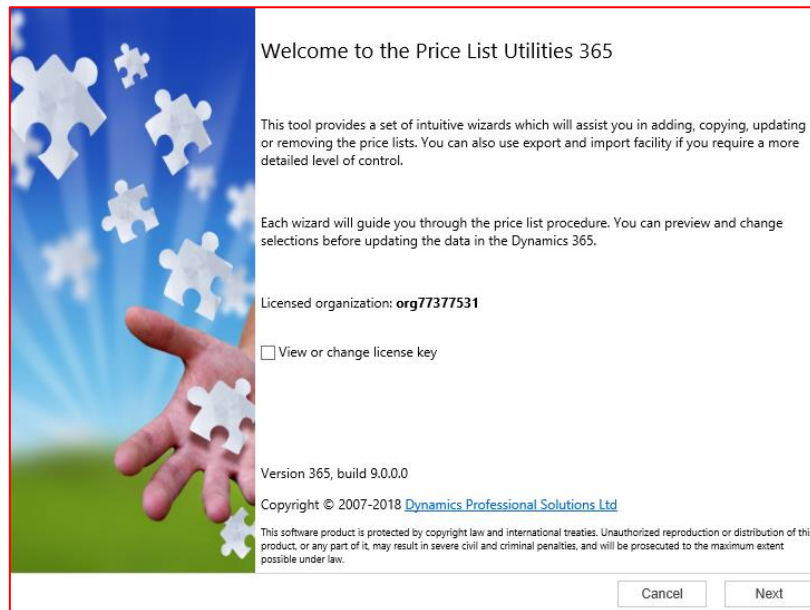


- b. Navigate to Products grid view from any location (for example Sales)
- 3. Click on the Price List Utilities button shown in the Ribbon



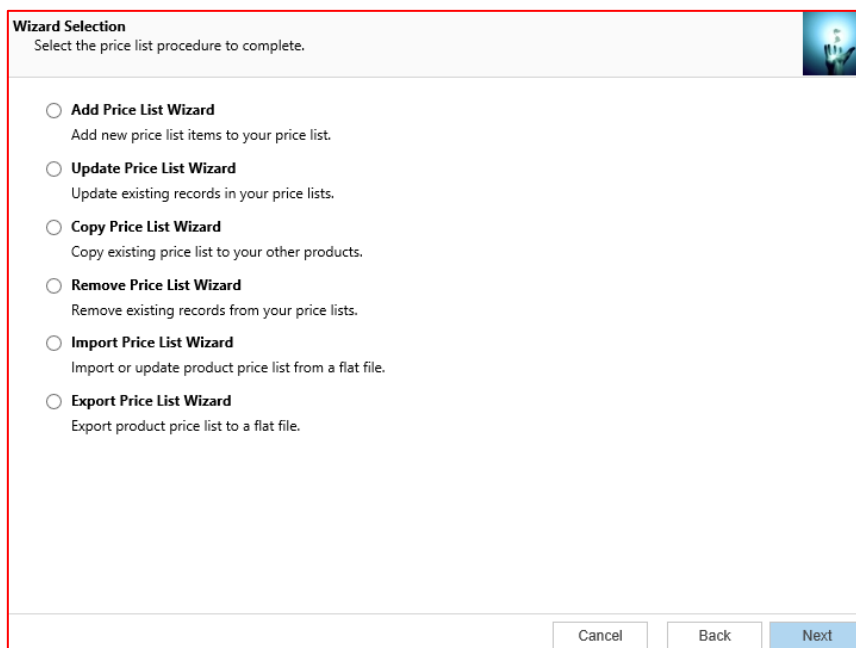
4. Welcome to Price List Utilities 365

On the Welcome to the Price List Utilities 365 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.



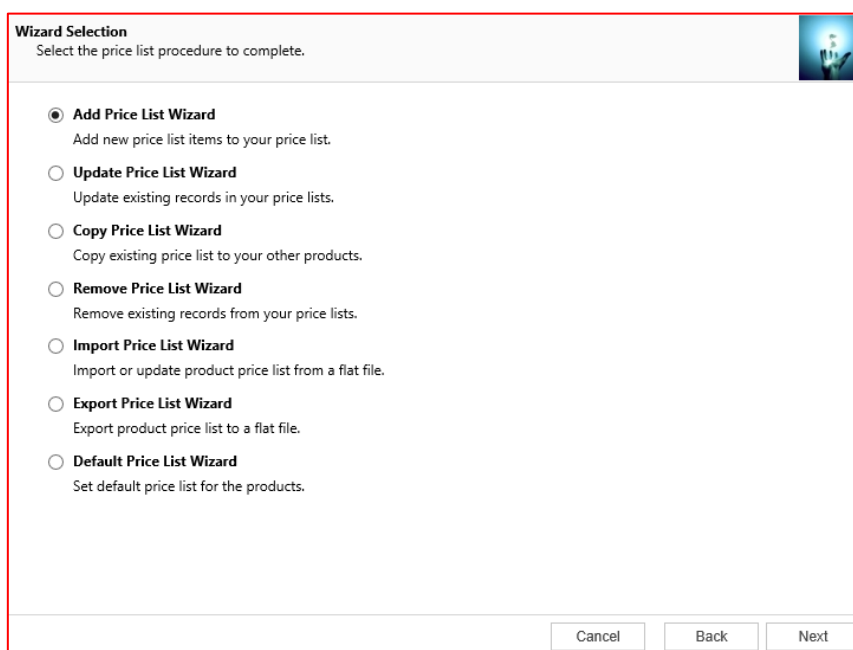
You can use this wizard to add price list item information to multiple products at once.

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

The image shows a software dialog box titled "Wizard Selection". Below the title bar, it says "Select the price list procedure to complete." There is a list of seven wizard options, each with a radio button and a description. The first option, "Add Price List Wizard", is selected. The other options are "Update Price List Wizard", "Copy Price List Wizard", "Remove Price List Wizard", "Import Price List Wizard", "Export Price List Wizard", and "Default Price List Wizard". At the bottom right of the dialog box are three buttons: "Cancel", "Back", and "Next".

Wizard Selection
Select the price list procedure to complete.

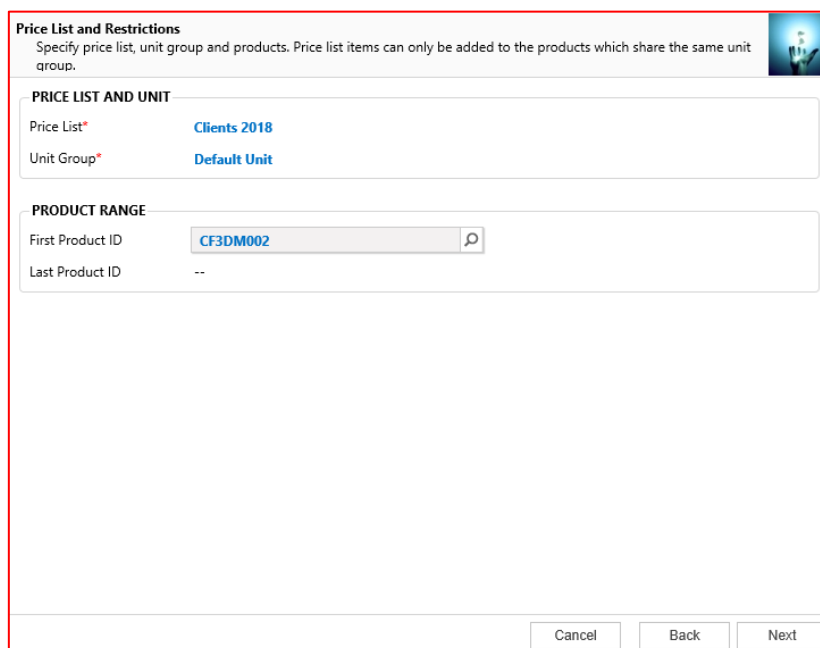
- ☒ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price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

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* **Clients 2018**

Unit Group* **Default Unit**

PRODUCT RANGE

First Product ID **CF3DM002**

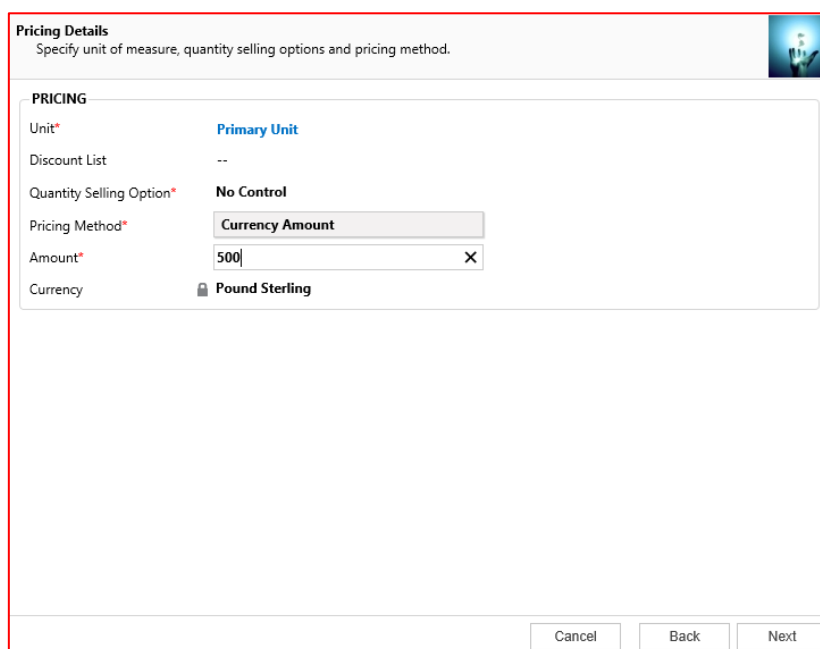
Last Product ID **--**

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.



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

PRICING

Unit* **Primary Unit**

Discount List **--**

Quantity Selling Option* **No Control**

Pricing Method* **Currency Amount**

Amount* **500**

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*

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 AllSelect None

All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit
<input checked="" type="checkbox"/>	Carbon Fiber 3D printing consumables	Clients 2018	Primary U...
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Clients 2018	Primary U...
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Clients 2018	Primary U...
<input checked="" type="checkbox"/>	Smart Extruder for 3D printer	Clients 2018	Primary U...

1

<

>

>>

50 items per page

1 - 4 of 4 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

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"/>	Carbon Fiber 3D printing consumables	Clients 2018	
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Clients 2018	
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Clients 2018	
<input checked="" type="checkbox"/>	Smart Extruder for 3D printer	Clients 2018	

Show items with value that:

Is equal to

And

Is equal to

Filter Clear

1 - 4 of 4 items

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

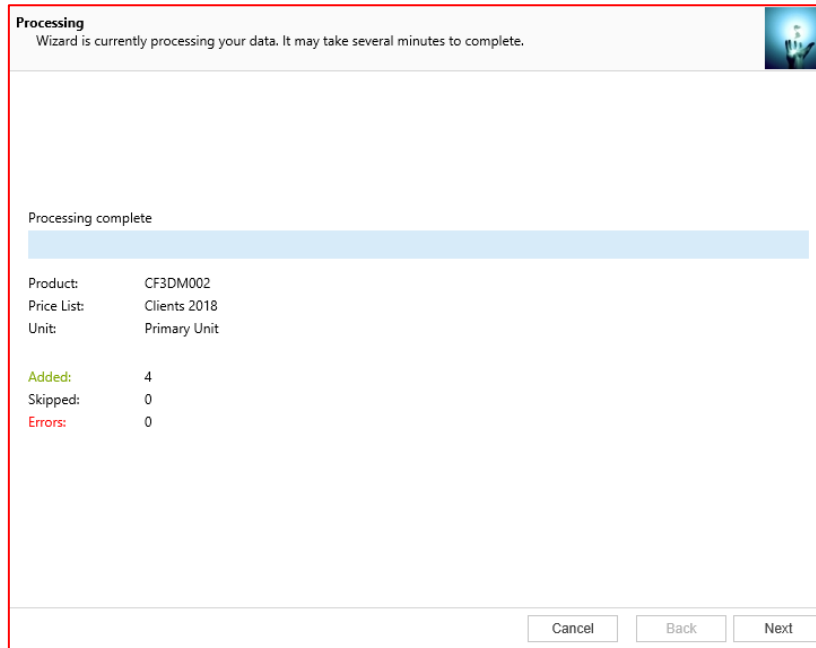
Setting	Value
Action	Add Price List
Price List	Clients 2018
Unit Group	Default Unit
Products	CF3DM002 : Last
Price List Items to Add	4
Unit	Primary Unit
Discount List	Not Specified
Quantity Selling Option	Whole
Pricing Method	Currency Amount
Amount	500.00

Cancel Back 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 progress bar labeled "Processing complete" which is filled. To the right of the progress bar, there is a small icon of a hand holding a puzzle piece. Below the progress bar, the following information is displayed:

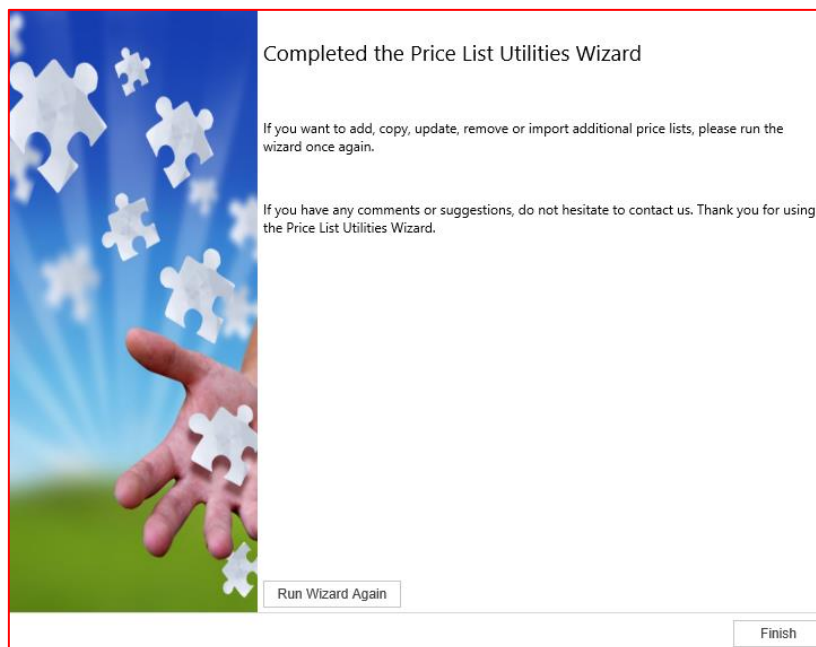
Product:	CF3DM002
Price List:	Clients 2018
Unit:	Primary Unit
Added:	4
Skipped:	0
Errors:	0

At the bottom right of the window, 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.

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, there is a large image of a hand holding several white puzzle pieces against a blue sky with green grass at the bottom. To the right of the image, the following text is displayed:

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 left of the window, there is a button labeled "Run Wizard Again". At the bottom right, there is a button labeled "Finish".

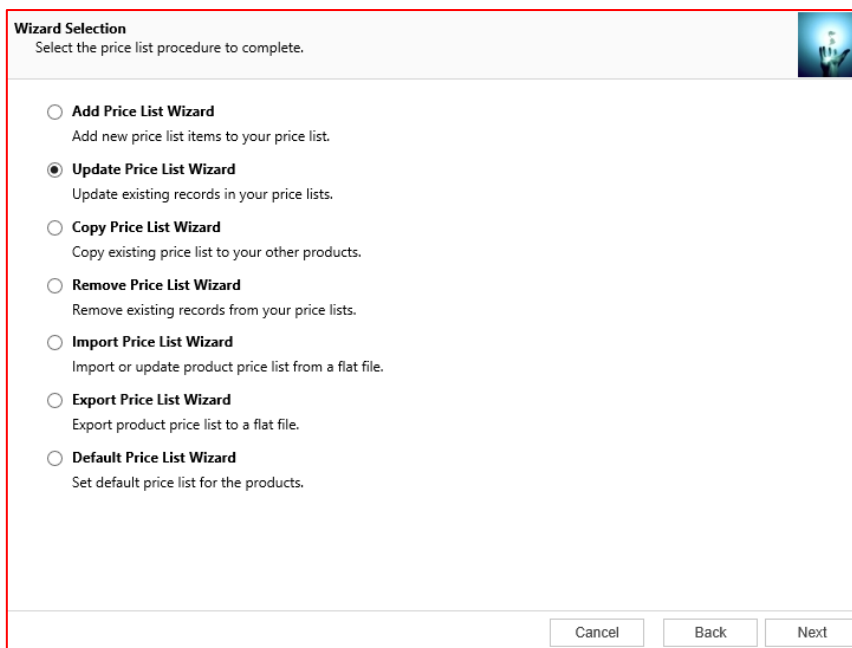
You can use this wizard to update price list item information for multiple products at once.

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 the instruction "Select the price list procedure to complete." Below this, there is a list of seven wizard 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.
- ☐ **Default Price List Wizard**
Set default price list for the products.

At the bottom right of the window, there are three buttons: "Cancel", "Back", and "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 [Partners 2018](#)
Last Price List [Partners 2018 \(SILVER\)](#)

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 (%)* **-10.00000**

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

Preview the records to be Updated and verify your selections.



Select AllSelect None

All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit	Current	Updated
<input checked="" type="checkbox"/>	Smart Extruder for 3D printer	Partners 2018	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Partners 2018 (...)	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Smart Extruder for 3D printer	Partners 2018 (...)	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Carbon Fiber 3D printing consumables	Partners 2018 (...)	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Partners 2018 (...)	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Carbon Fiber 3D printing consumables	Partners 2018 (...)	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Carbon Fiber 3D printing consumables	Partners 2018	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Partners 2018	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Smart Extruder for 3D printer	Partners 2018 (...)	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Partners 2018	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Partners 2018 (...)	Primary U...	500.00	450.00
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Partners 2018 (...)	Primary U...	500.00	450.00

1

<>

50 items per page

1 - 12 of 12 items

Cancel

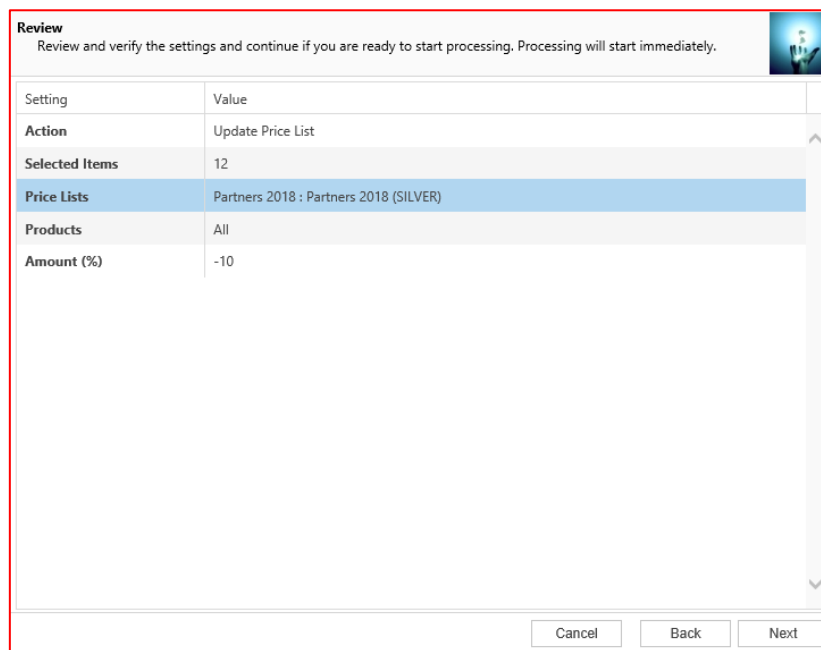
Back

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.



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

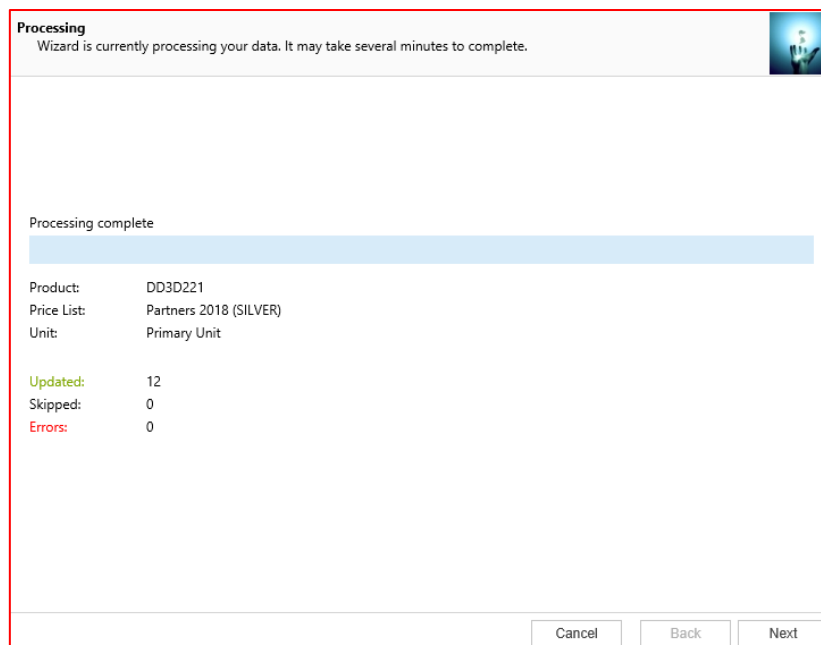
Setting	Value
Action	Update Price List
Selected Items	12
Price Lists	Partners 2018 : Partners 2018 (SILVER)
Products	All
Amount (%)	-10

Buttons: 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 complete

Product: DD3D221
Price List: Partners 2018 (SILVER)
Unit: Primary Unit

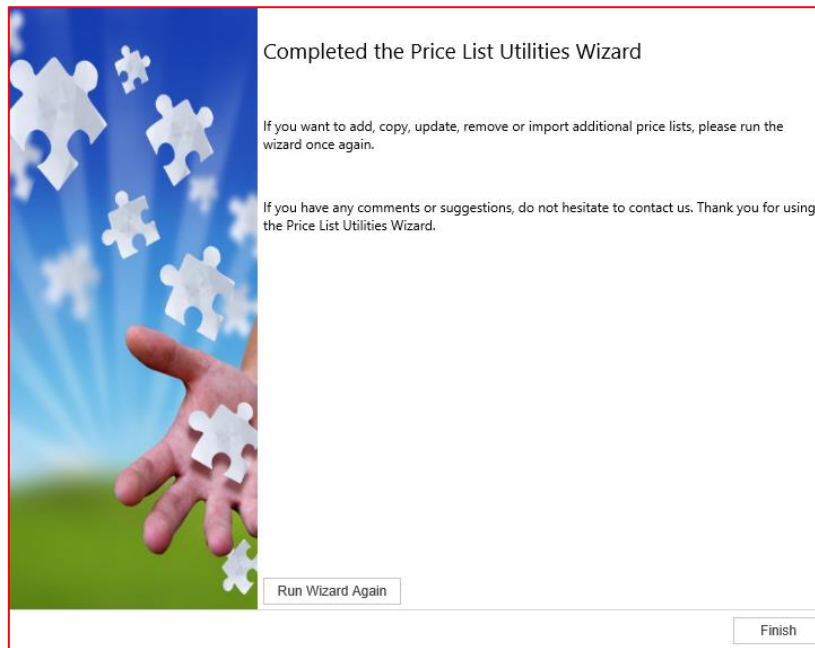
Updated: 12
Skipped: 0
Errors: 0

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.

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.

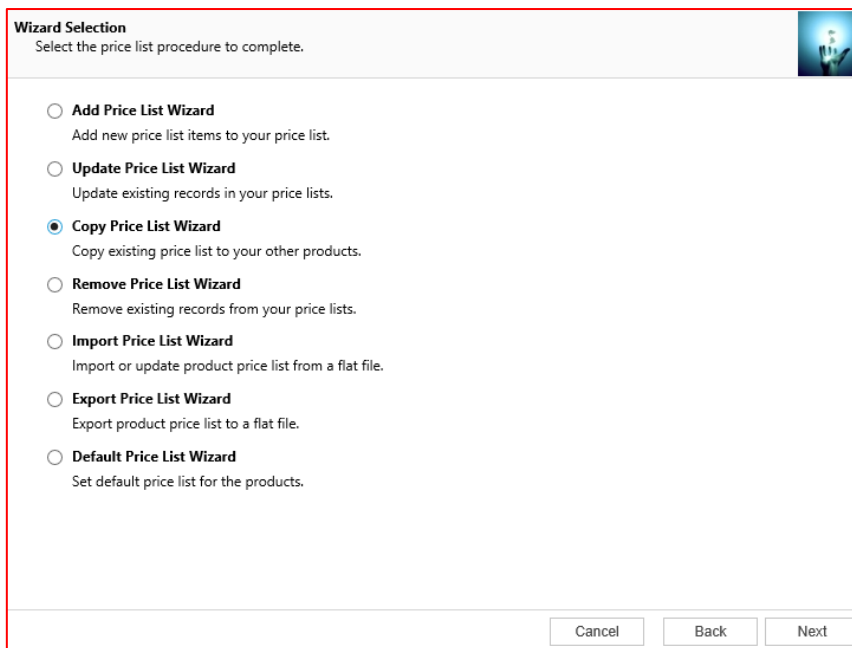


You can use this wizard to copy price list item information from one product (selected template product) to multiple products at once.

To copy price list items to multiple products:

1. Choose a wizard

In the “Wizard Selection” screen select the “Copy 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.
- ☐ **Default Price List Wizard**
Set default price list for the products.

Cancel Back Next

Click “Next” to continue.

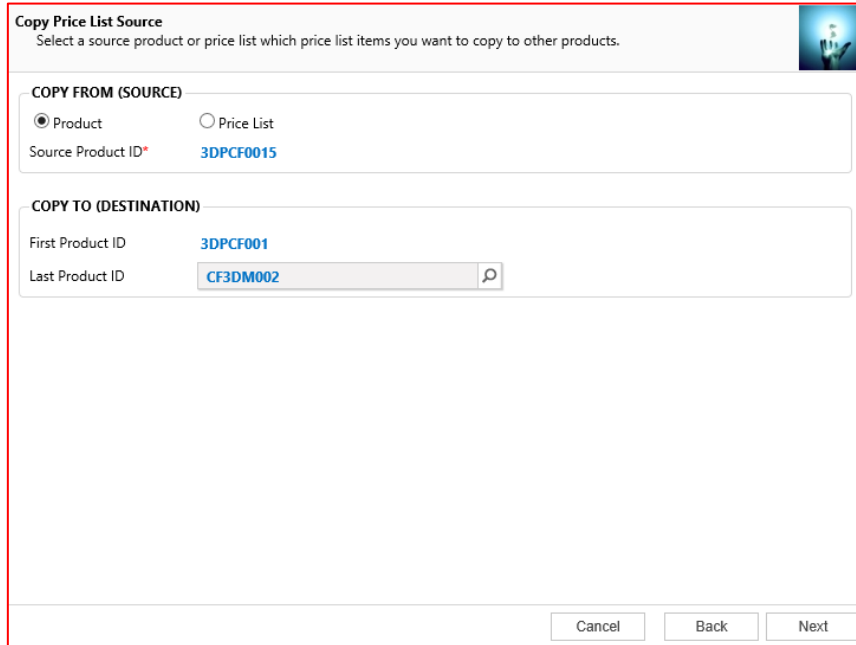
2. Select source product and restrictions

Choose how you want to copy information. You can copy price list items:

- 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.



Copy Price List Source
Select a source product or price list which price list items you want to copy to other products.

COPY FROM (SOURCE)

☒ Product ☐ Price List

Source Product ID* **3DPCF0015**

COPY TO (DESTINATION)

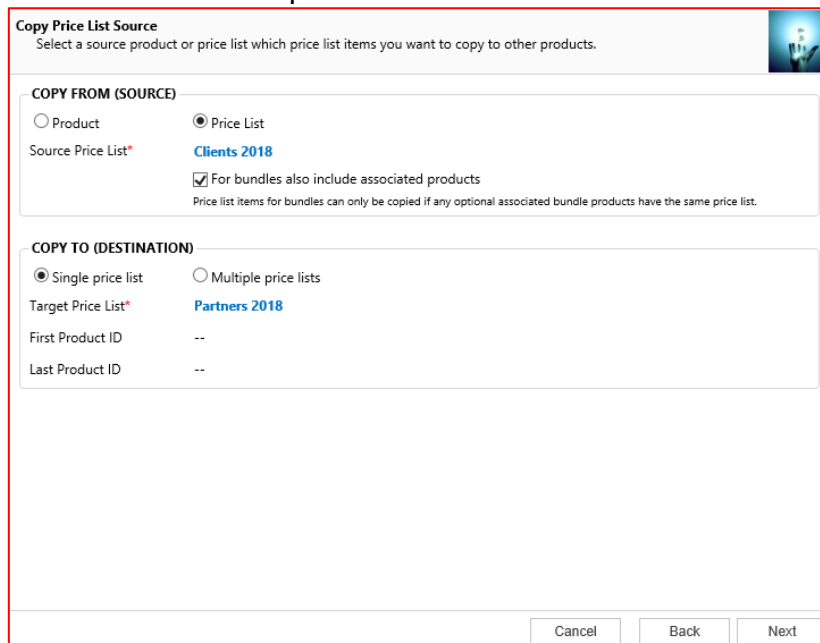
First Product ID **3DPCF001**

Last Product ID **CF3DM002** 🔍

Cancel Back 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.



Copy Price List Source
Select a source product or price list which price list items you want to copy to other products.

COPY FROM (SOURCE)

☐ Product ☒ Price List

Source Price List* **Clients 2018**

☒ For bundles also include associated products
Price list items for bundles can only be copied if any optional associated bundle products have the same price list.

COPY TO (DESTINATION)

☒ Single price list ☐ Multiple price lists

Target Price List* **Partners 2018**

First Product ID --

Last Product ID --

Cancel Back 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.

Target Price Lists
Select one or more target price lists to which the source price list will be copied to.

Select All Select None

<input checked="" type="checkbox"/>	Price List	
<input checked="" type="checkbox"/>	Partners 2018	
<input checked="" type="checkbox"/>	Partners 2018 (GOLD)	
<input checked="" type="checkbox"/>	Partners 2018 (SILVER)	

< << 1 >> > 50 items per page 1 - 3 of 3 items

Cancel Back Next

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.

Preview
Preview the records to be Copied and verify your selections.

Select All Select None All items selected

<input checked="" type="checkbox"/>	Product	Price List	Unit
<input checked="" type="checkbox"/>	Carbon Fiber 3D printing consumables	Partners 2018	Primary U...
<input checked="" type="checkbox"/>	Carbon Fiber 3D printing consumables	Partners 2018 (...)	Primary U...
<input checked="" type="checkbox"/>	Carbon Fiber 3D printing consumables	Partners 2018 (...)	Primary U...
<input checked="" type="checkbox"/>	Smart Extruder for 3D printer	Partners 2018	Primary U...
<input checked="" type="checkbox"/>	Smart Extruder for 3D printer	Partners 2018 (...)	Primary U...
<input checked="" type="checkbox"/>	Smart Extruder for 3D printer	Partners 2018 (...)	Primary U...
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Partners 2018	Primary U...
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Partners 2018 (...)	Primary U...
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Partners 2018 (...)	Primary U...
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Partners 2018	Primary U...
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Partners 2018 (...)	Primary U...
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Partners 2018 (...)	Primary U...

< << 1 >> > 50 items per page 1 - 12 of 12 items

Cancel Back Next

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.

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

Setting	Value
Action	Copy Price List
Source Price List	Clients 2018
Source Price Lists	Partners 2018 : Partners 2018 (SILVER)
Selected Items	12
Products	All

Cancel

Back

Next

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

Processing complete

Product:
Price List: Partners 2018 (SILVER)
Unit: Primary Unit

Copied: 12
Skipped: 0
Errors: 0

Cancel

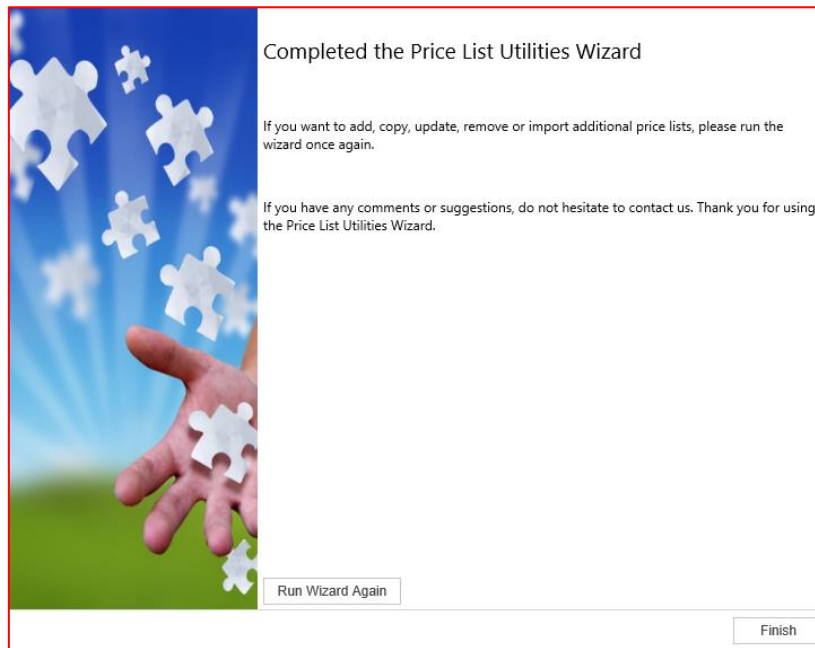
Back

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.

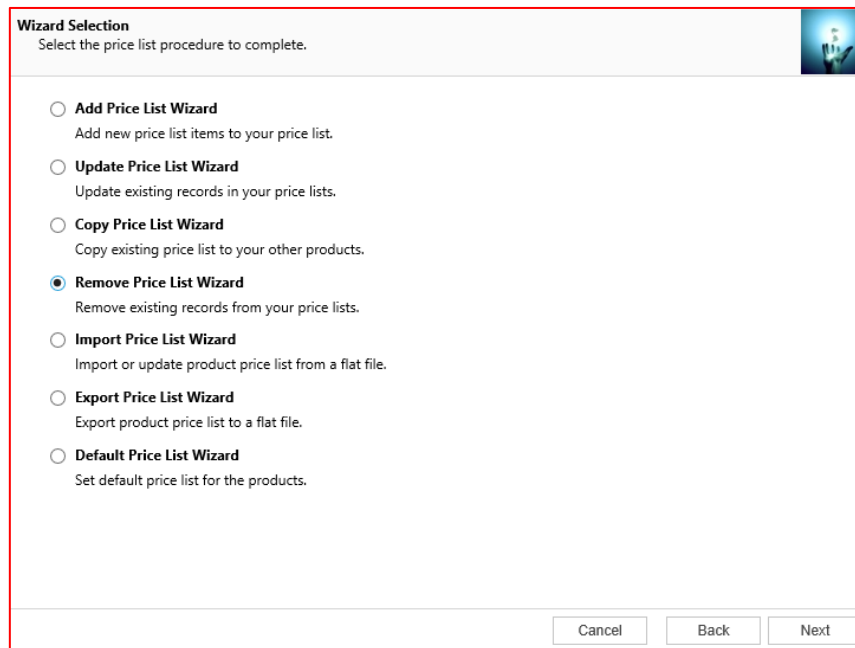


You can use this wizard to remove price list item information from multiple products at once.

To remove price list items from multiple products:

1. Choose a wizard

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



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.
- ☐ **Default Price List Wizard**
Set default price list for the products.

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 2018](#)
Last Price List: [Partners 2018](#)

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"/>	Smart Extruder for 3D printer	Partners 2018	Primary U...
<input checked="" type="checkbox"/>	Carbon Fiber 3D printing consumables	Partners 2018	Primary U...
<input checked="" type="checkbox"/>	Digitizer Desktop 3D Scanner	Partners 2018	Primary U...
<input checked="" type="checkbox"/>	Self Service Retail PoS system	Partners 2018	Primary U...

1 - 4 of 4 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	4
Price Lists	Partners 2018 : Partners 2018
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:	SE3321
Price List:	Partners 2018
Unit:	Primary Unit
Removed:	4
Skipped:	0
Errors:	0

Cancel

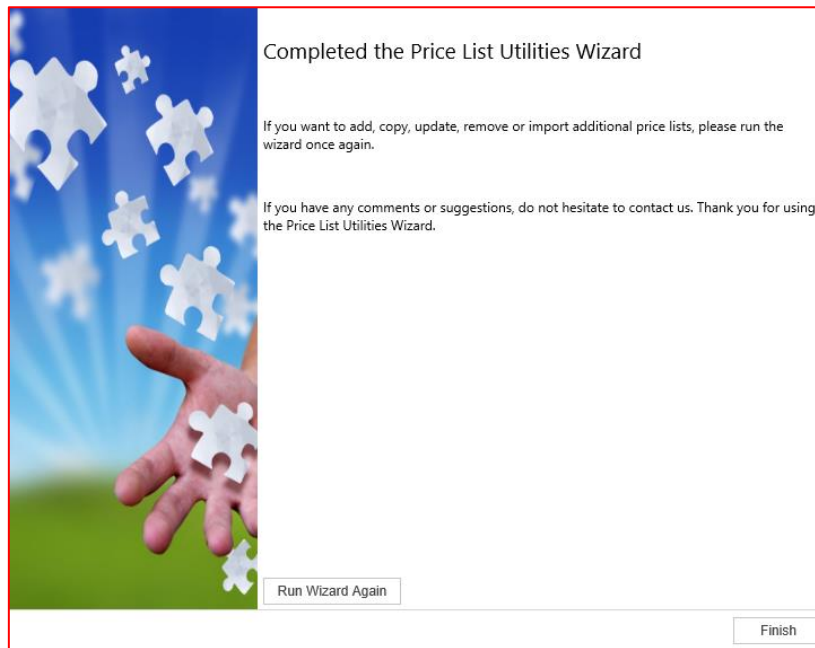
Back

Next

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

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.

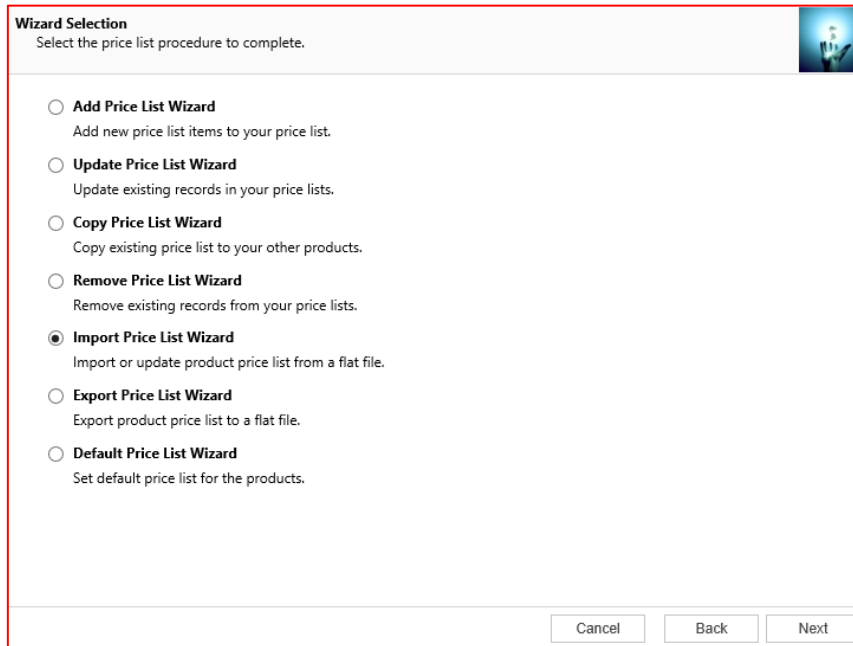
Requirements for the successful import or update:

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



Wizard Selection
Select the price list procedure to complete.

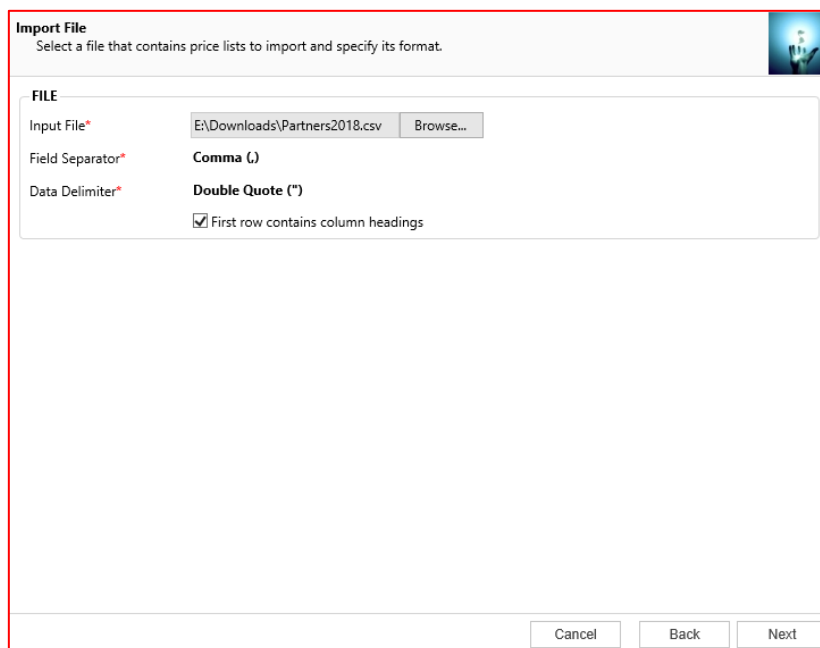
- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price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

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.



The 'Import File' dialog box is shown, titled 'Import File' with a subtitle 'Select a file that contains price lists to import and specify its format.' It features a 'FILE' section with the following fields:

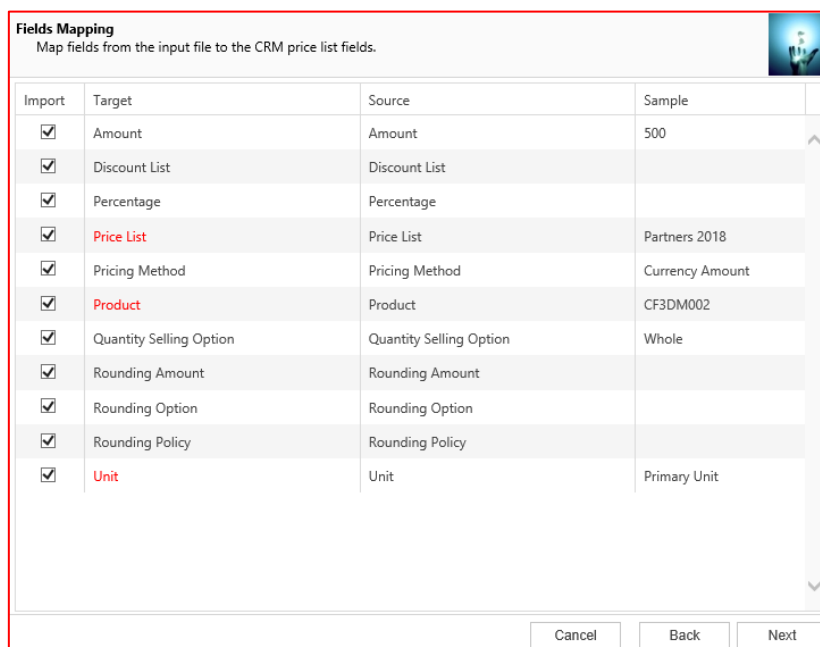
- Input File***: E:\Downloads\Partners2018.csv (with a 'Browse...' button)
- Field Separator***: Comma (,)
- Data Delimiter***: Double Quote (")
- ☒ First row contains column headings

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

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.



The 'Fields Mapping' dialog box is shown, titled 'Fields Mapping' with a subtitle 'Map fields from the input file to the CRM price list fields.' It contains a table with the following data:

Import	Target	Source	Sample
<input checked="" type="checkbox"/>	Amount	Amount	500
<input checked="" type="checkbox"/>	Discount List	Discount List	
<input checked="" type="checkbox"/>	Percentage	Percentage	
<input checked="" type="checkbox"/>	Price List	Price List	Partners 2018
<input checked="" type="checkbox"/>	Pricing Method	Pricing Method	Currency Amount
<input checked="" type="checkbox"/>	Product	Product	CF3DM002
<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	
<input checked="" type="checkbox"/>	Unit	Unit	Primary Unit

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

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	Percentage	Price List	Pricing Method	Product
500			Partners 2018	Currency Amount	CF3DM002
500			Partners 2018	Currency Amount	SE3321
500			Partners 2018	Currency Amount	PoS21
500			Partners 2018	Currency Amount	DD3D221

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50 items per page

1 - 4 of 4 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.

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	Partners2018.csv
Selected Items	4

Cancel

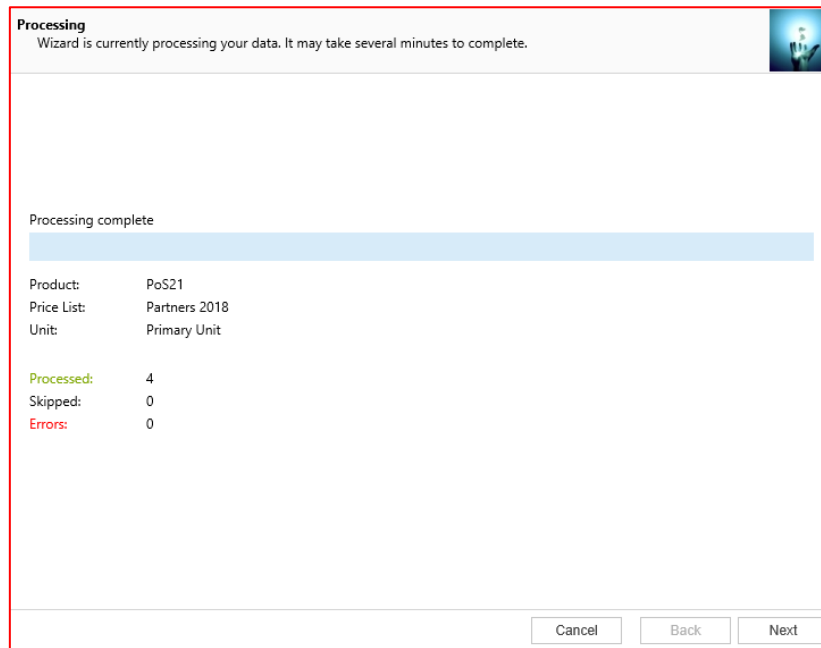
Back

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.



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 progress bar is shown at 100% completion. The window displays the following information:

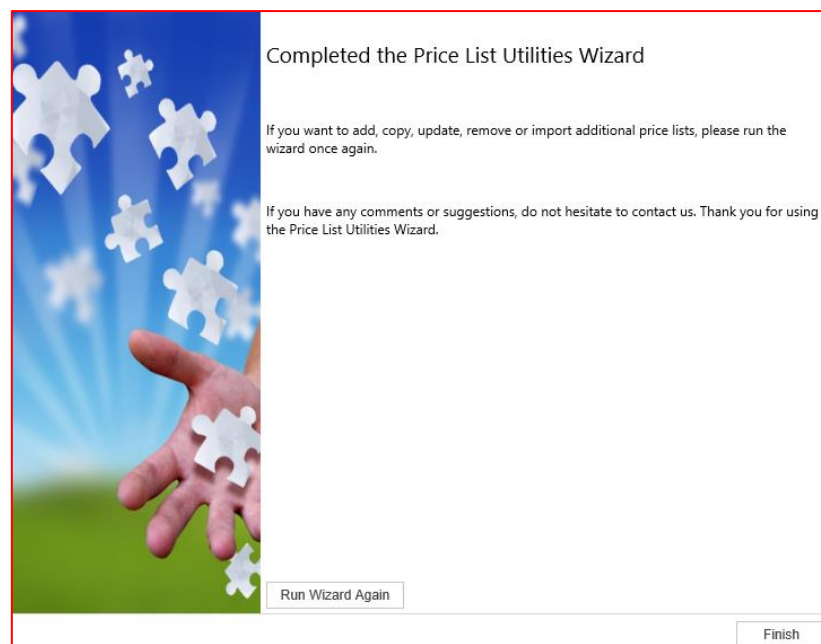
Product:	Pos21
Price List:	Partners 2018
Unit:	Primary Unit
Processed:	4
Skipped:	0
Errors:	0

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 a graphic 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:

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.

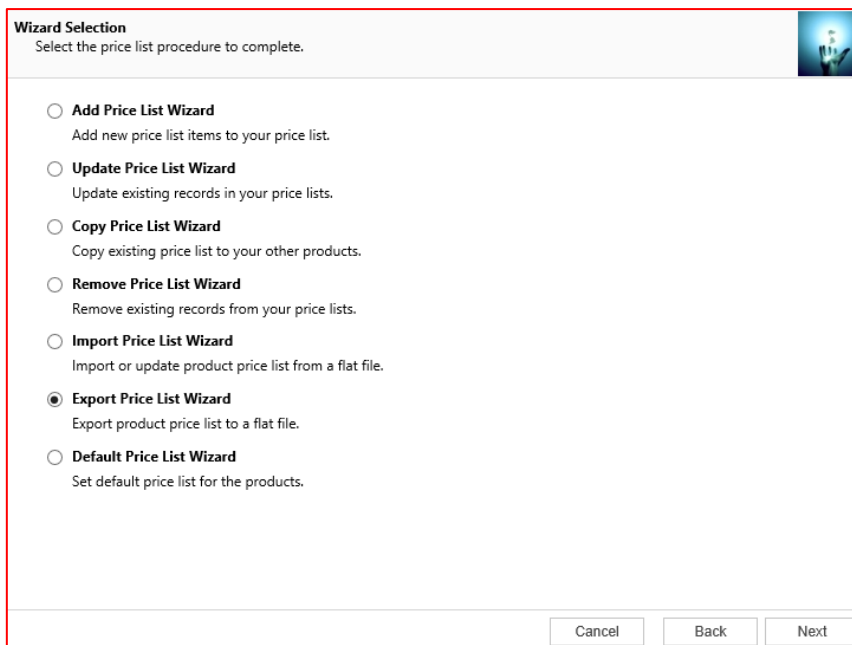
At the bottom, there are two buttons: "Run Wizard Again" and "Finish".

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”.



Wizard Selection
Select the price list procedure to complete.

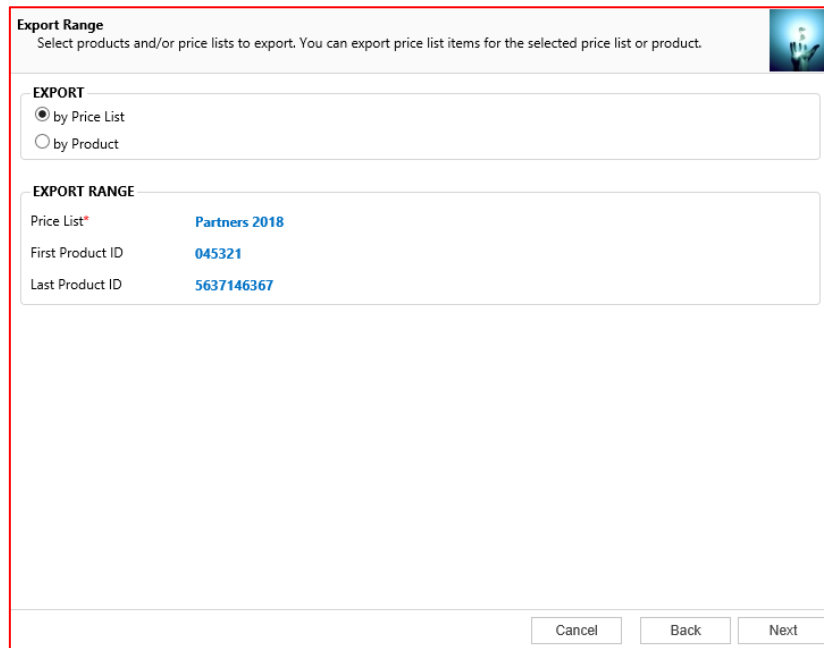
- ☐ **Add Price List Wizard**
Add new price list items to your price list.
- ☐ **Update Price List Wizard**
Update existing records in your price lists.
- ☐ **Copy Price List Wizard**
Copy existing price list to your other products.
- ☐ **Remove Price List Wizard**
Remove existing records from your price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

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* **Partners 2018**

First Product ID **045321**

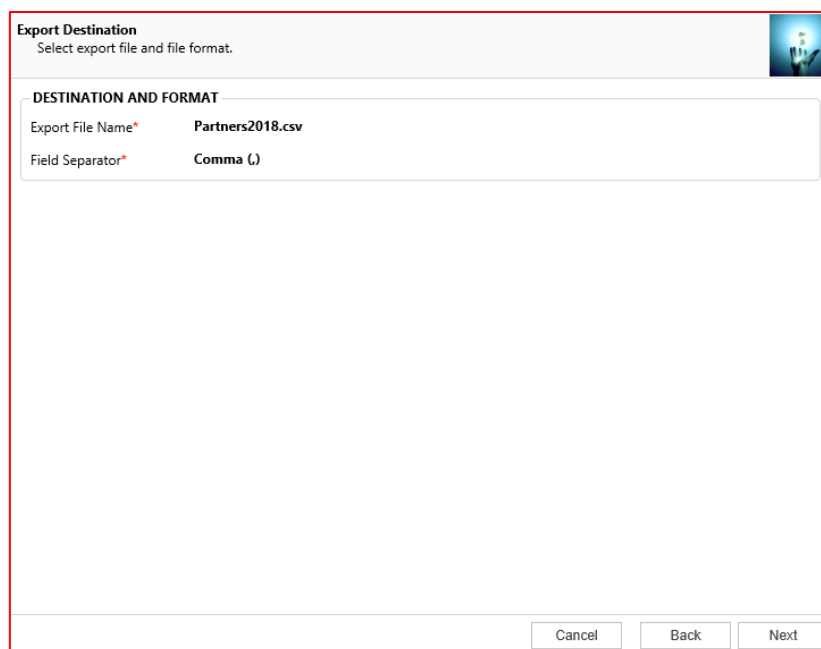
Last Product ID **5637146367**

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* **Partners2018.csv**

Field Separator* **Comma (,)**

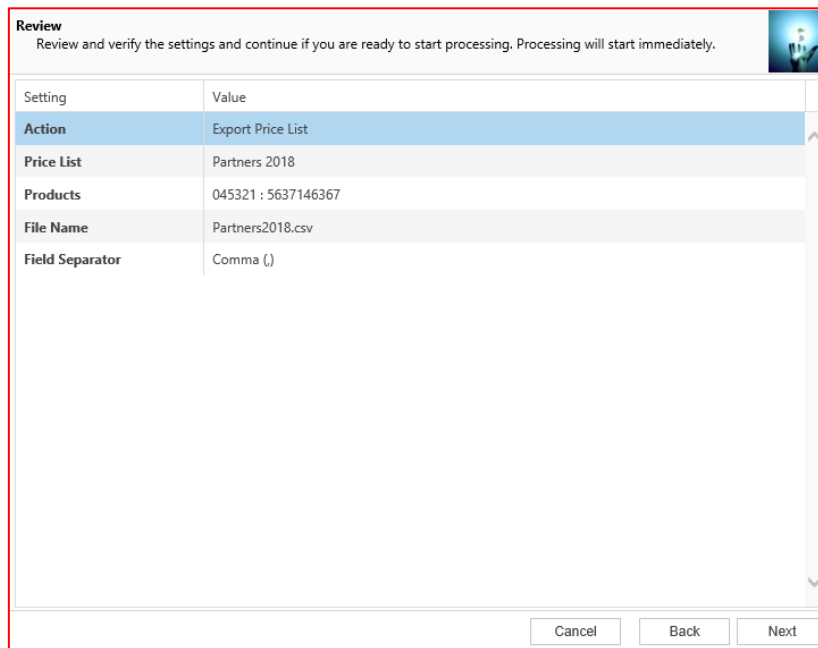
Cancel Back Next

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



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

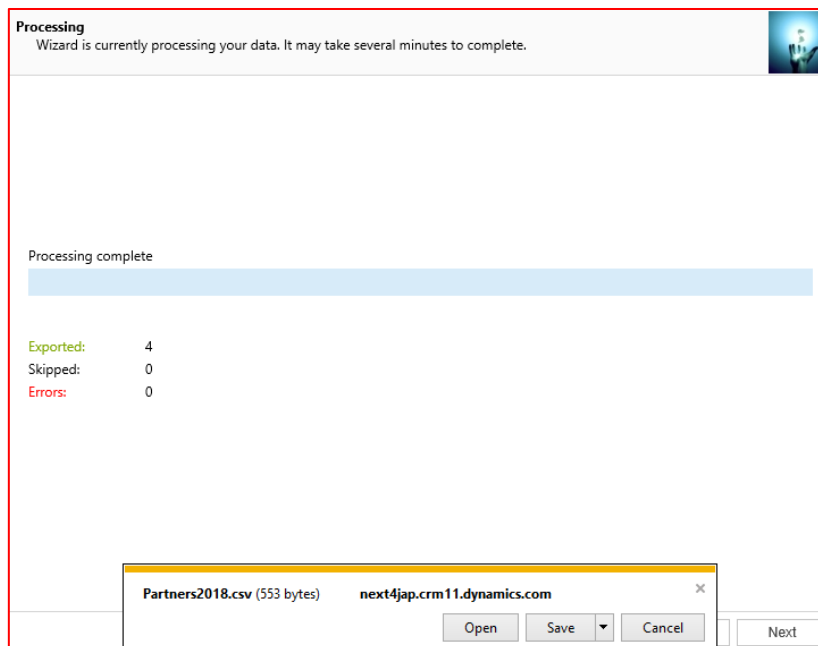
Setting	Value
Action	Export Price List
Price List	Partners 2018
Products	045321 : 5637146367
File Name	Partners2018.csv
Field Separator	Comma (,)

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 complete

Exported: 4
Skipped: 0
Errors: 0

Partners2018.csv (553 bytes) next4jap.crm11.dynamics.com

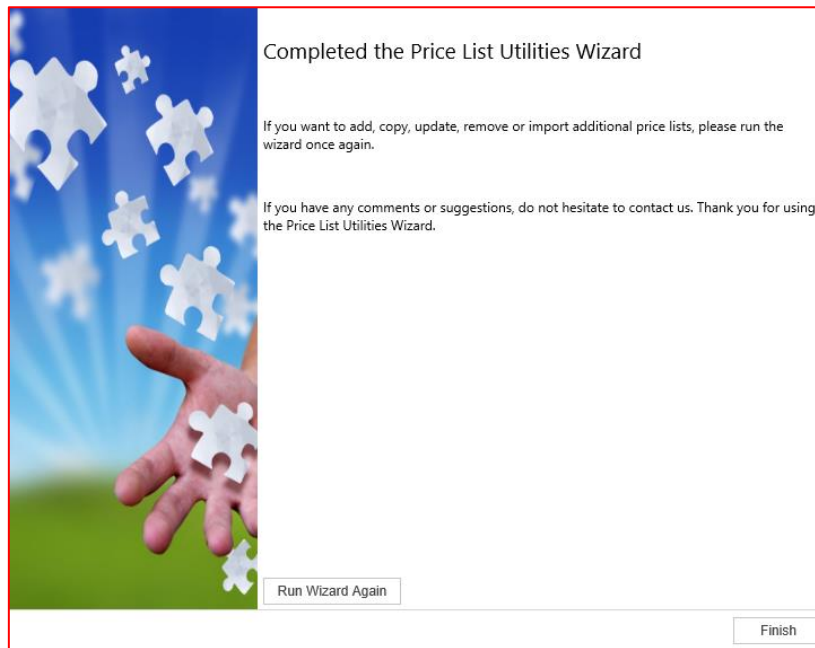
Open Save Cancel Next

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.

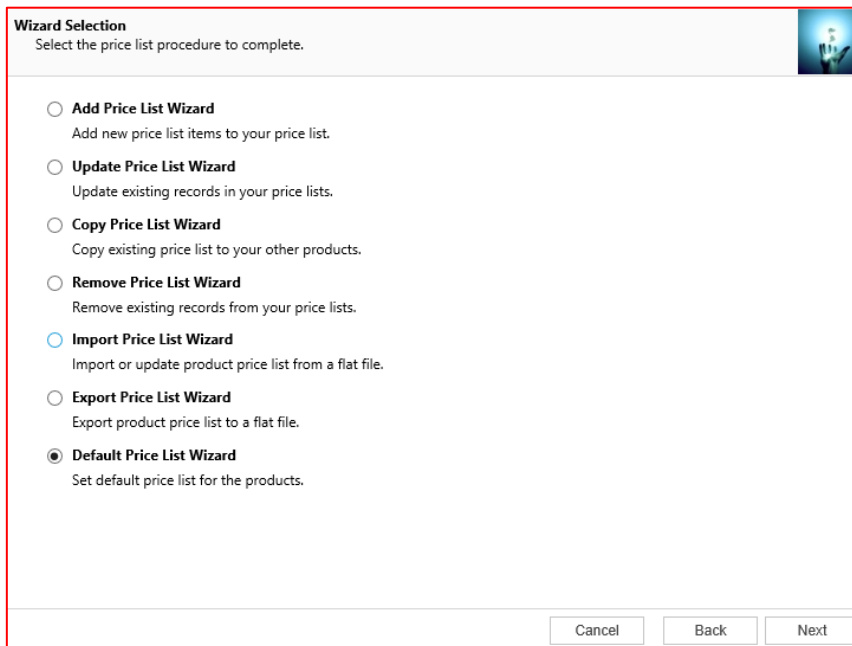
6. Completed the Price List Utilities Wizard

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



1. Choose a wizard

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

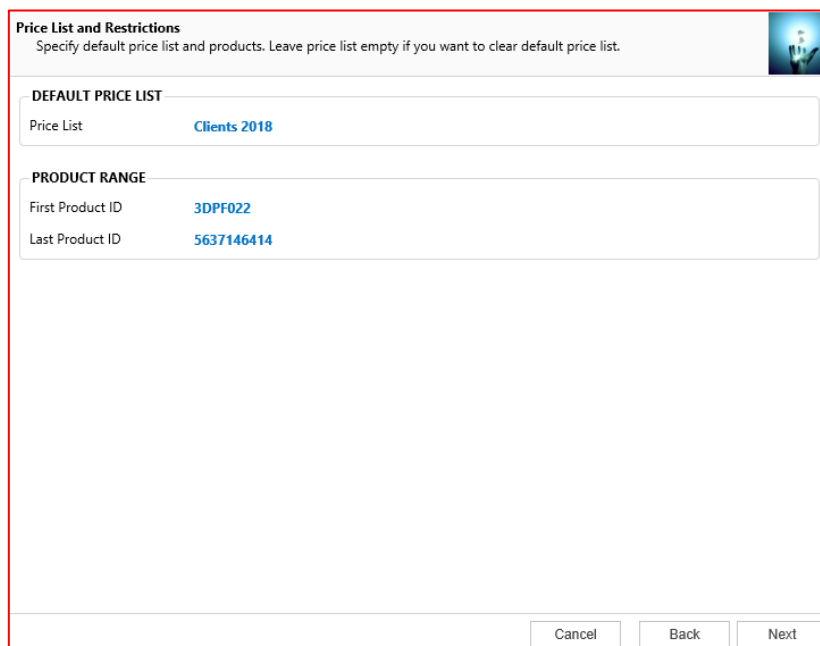
The screenshot shows a window titled "Wizard Selection" with the instruction "Select the price list procedure to complete." There is a list of seven wizard options, each with a radio button and a description. The "Default Price List Wizard" is selected with a filled radio button. At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

Wizard Selection	
Select the price list procedure to complete.	
<input type="radio"/>	Add Price List Wizard Add new price list items to your price list.
<input type="radio"/>	Update Price List Wizard Update existing records in your price lists.
<input type="radio"/>	Copy Price List Wizard Copy existing price list to your other products.
<input type="radio"/>	Remove Price List Wizard Remove existing records from your price lists.
<input checked="" type="radio"/>	Import Price List Wizard Import or update product price list from a flat file.
<input type="radio"/>	Export Price List Wizard Export product price list to a flat file.
<input checked="" type="radio"/>	Default Price List Wizard Set default price list for the products.

Click “Next” to continue.

2. Price List and Restrictions

In the “Price List and Restrictions” screen select the Price List you want to set as default and range of products you want to update.

The screenshot shows a window titled "Price List and Restrictions" with the instruction "Specify default price list and products. Leave price list empty if you want to clear default price list." It has two sections: "DEFAULT PRICE LIST" and "PRODUCT RANGE". The "DEFAULT PRICE LIST" section has a "Price List" field with the value "Clients 2018". The "PRODUCT RANGE" section has "First Product ID" as "3DPF022" and "Last Product ID" as "5637146414". At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

Price List and Restrictions	
Specify default price list and products. Leave price list empty if you want to clear default price list.	
DEFAULT PRICE LIST	
Price List	Clients 2018
PRODUCT RANGE	
First Product ID	3DPF022
Last Product ID	5637146414

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

Preview the records to be updated with default price list and verify your selections.

Select All

Select None

All items selected

<input checked="" type="checkbox"/>	Product	Current Pri...	Price List
<input checked="" type="checkbox"/>	ABS Filament 3D Printer 4"	Retail	Clients 2018
<input checked="" type="checkbox"/>	Fabrikam Laptop12 M2000	Retail	Clients 2018
<input checked="" type="checkbox"/>	Fabrikam Laptop15 M5000	Retail	Clients 2018
<input checked="" type="checkbox"/>	Fabrikam Laptop16 M6000	Retail	Clients 2018
<input checked="" type="checkbox"/>	Fabrikam Laptop19 M9000		Clients 2018
<input checked="" type="checkbox"/>	Fabrikam Tablet M100	Retail	Clients 2018
<input checked="" type="checkbox"/>	Fabrikam Tablet M150	Retail	Clients 2018
<input checked="" type="checkbox"/>	Fabrikam Tablet M200	Retail	Clients 2018
<input checked="" type="checkbox"/>	Fabrikam Tablet M50	Retail	Clients 2018
<input checked="" type="checkbox"/>	FDM Filament 3D Printer 10"	Retail	Clients 2018
<input checked="" type="checkbox"/>	Proseware Ink Jet All in one M300		Clients 2018
<input checked="" type="checkbox"/>	Proseware Laptop12 M210	Retail	Clients 2018

1

50

items per page

1 - 50 of 72 items

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

Review

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

Setting	Value
Action	Default Price List
Price List	Clients 2018
Products	3DPF022 : 5637146414
Products to Process	72

Cancel

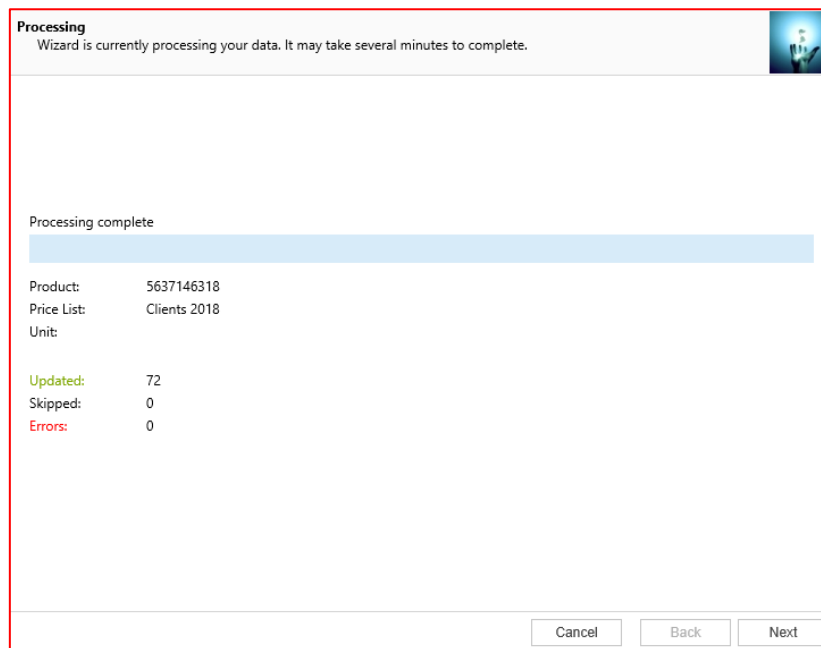
Back

Next

Click “Next” to continue.

5. Processing

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



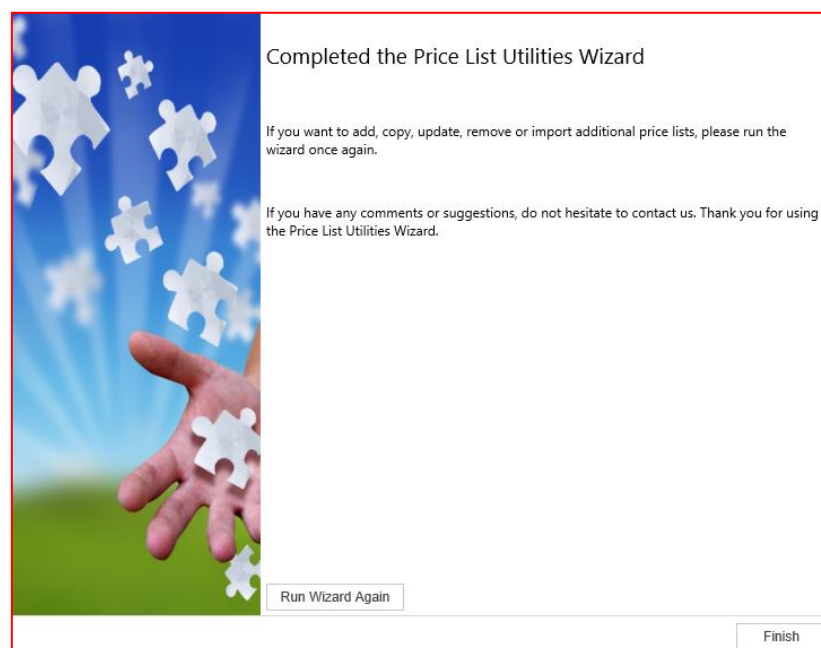
The screenshot shows a window titled "Processing" with a status bar indicating "Wizard is currently processing your data. It may take several minutes to complete." Below this, a progress bar is shown, followed by the text "Processing complete". The window displays the following information:

Product:	5637146318
Price List:	Clients 2018
Unit:	
Updated:	72
Skipped:	0
Errors:	0

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

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.



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 in 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 of the window, there are two buttons: "Run Wizard Again" and "Finish".

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.

Support:

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

Download:

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

