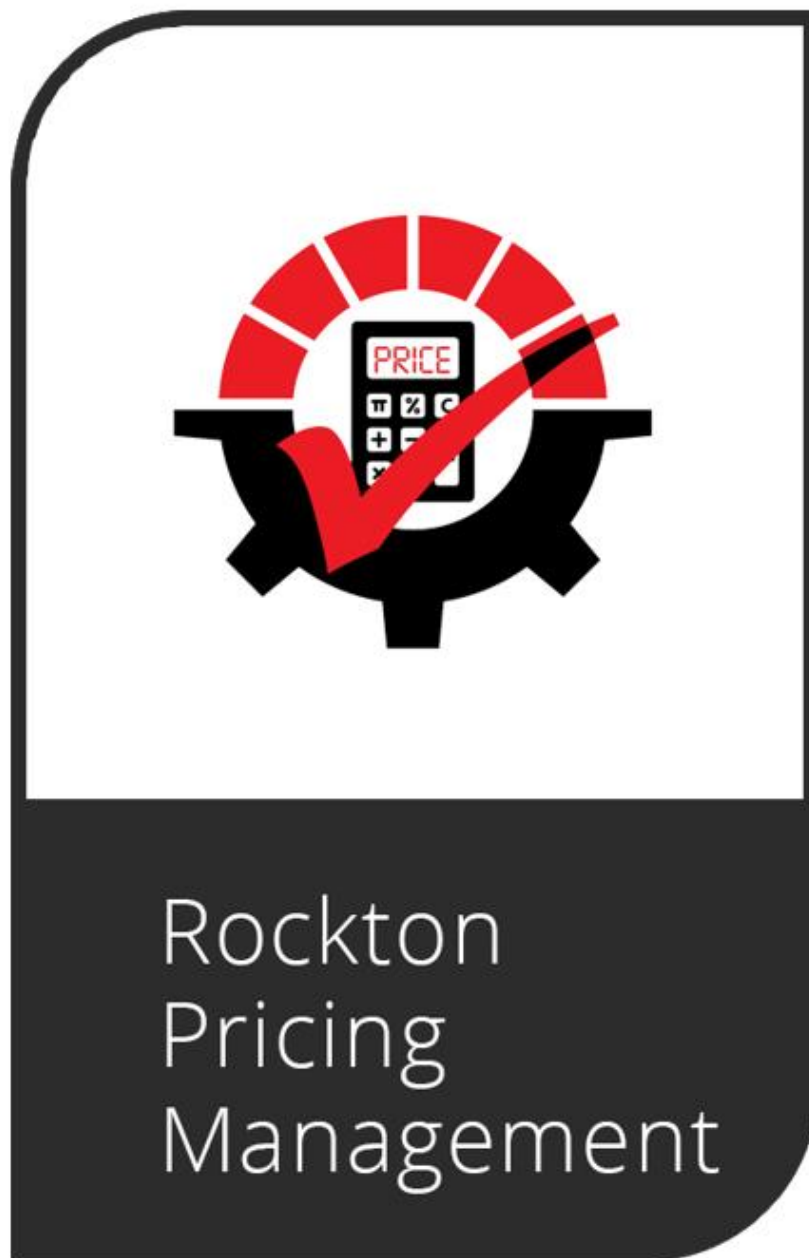


Rockton Pricing Management GP Connector

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1. Title



Rockton Pricing Management

January 28, 2026



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4. Introduction

For Rockton Pricing Management (RPM) to function in a typical customer environment, it requires two key components:

1. Pricing Application - A stand alone, SQL based web application serving as the foundation for RPM's pricing functionalities.
2. Connector - This is an ERP-specific software module tailored for a seamless integration between RPM and Microsoft Dynamics GP.

This document describes how to install, configure, and use the RPM Connector within Dynamics GP. It assumes the RPM application component of RPM is already installed and that the necessary data from Dynamics GP (e.g., Accounts, Items, Customers) has been successfully imported into RPM.

Note: For more information on RPM, refer to the Help Files within the RPM application.

To use RPM and the GP Connector, it is necessary that all configuration steps pertaining to Sales and Inventory within Dynamics GP are complete. For example, the Schedule ID in RPM corresponds to the Price Level in Dynamics GP, therefore, you must ensure that any Schedule IDs being used in RPM are set up in Dynamics GP as Price Levels and appropriately assigned to Customers or Items.

5. Installation Information

Installation Overview

There are five main steps to installing and configuring the RPM Connector for GP. These will be described in detail in the following sections.

1. Complete prerequisites.
2. Install the Dynamics GP OData service.
3. Install the RPM Connector for GP.
4. Complete OData configuration in Dynamics GP.
5. Test the OData connection.

5.1. Prerequisites for RPM GP Connector

Prerequisites for RPM GP Connector Data Sync Setup

To install the GP OData service, you will first need to have the following configured on your system.

1. The server where you install the GP OData service must have a Dynamics GP client installed.
2. This server must be on a domain and Active Directory must be installed.
3. You must have a valid SSL certificate to use for the GP OData service.
4. Verify that the ISS site you are using has a binding configured for https. Ensure the following:
 - The hostname in the binding matches the one specified in the SSL certificate from step 3.
 - The port used in the binding is accessible from external sources through your firewall.
5. You must have a service account to use for running the GP OData service.
6. You must have a separate AD user that will access Dynamics GP via OData.
7. You must create a dedicated GP user that will be tied to the AD user in step 6. This user will be granted access to the OD Security Roles for the data you will be exposing to the OData service.
8. Open the following IPs in your firewall to all the RPM Services to be accessed from Azure:
 - 104.40.21.181
 - 20.112.214.89
 - 20.112.214.66

- 20.112.214.131
- 20.112.212.207
- 20.112.214.10
- 20.112.210.119
- 20.112.214.77
- 20.112.214.62
- 20.112.209.220
- 20.112.214.121
- 20.112.214.91
- 20.112.214.82
- 20.118.56.10
- 20.84.193.133
- 20.112.214.70
- 20.112.214.37
- 20.112.214.84
- 20.112.210.115
- 20.112.212.196
- 20.112.214.55
- 20.112.212.150
- 20.112.213.8
- 20.112.213.4
- 20.112.208.18
- 20.84.194.108
- 20.112.214.148
- 20.112.214.175
- 20.112.214.12
- 20.112.214.6
- 20.112.214.169
- 20.112.210.205
- 104.40.21.181

9. Enable OLE Automation on your SQL Server by running the following in SSMS:

```
sp_configure 'show advanced options', 1;
GO
RECONFIGURE;
GO
sp_configure 'Ole Automation Procedures', 1;
GO
RECONFIGURE;
GO
```

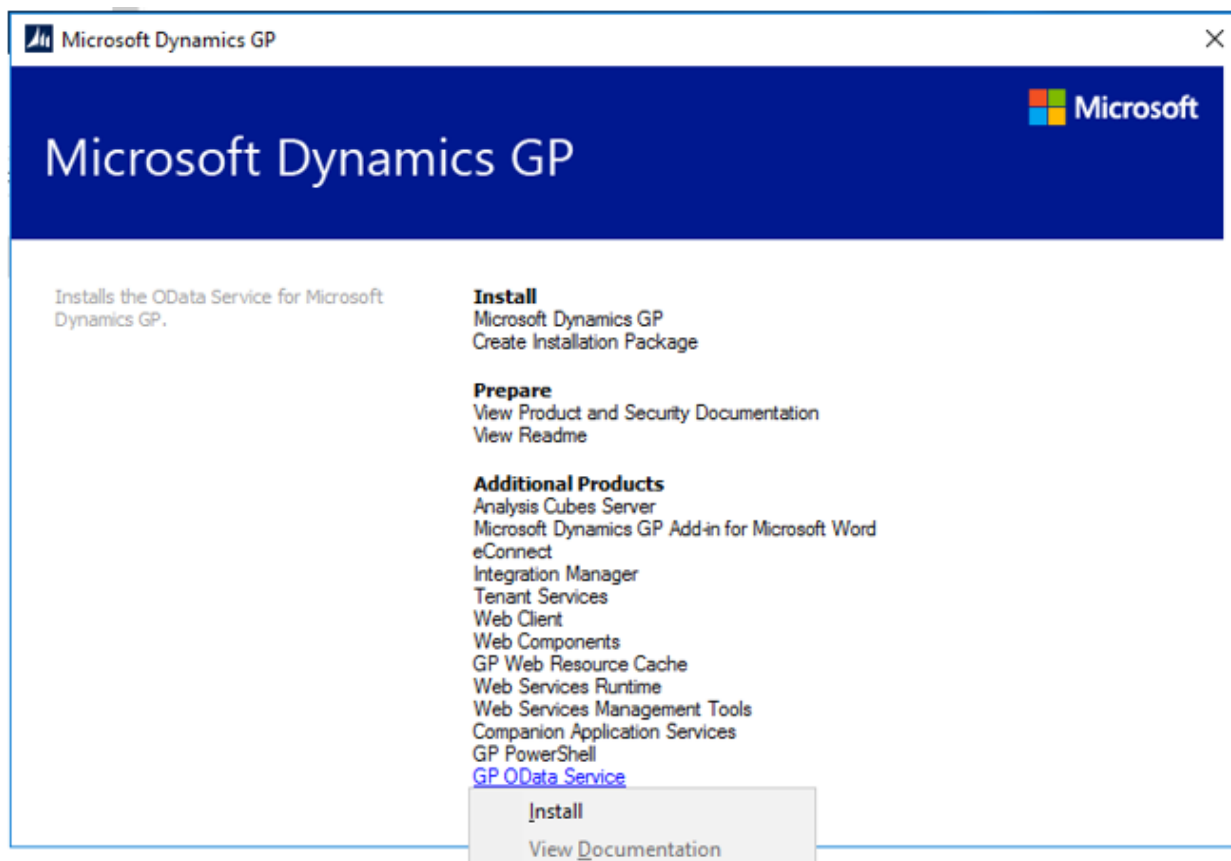
5.2. Install of Dynamics GP OData Service and RPM Connector

Part 1: Install GP OData Service

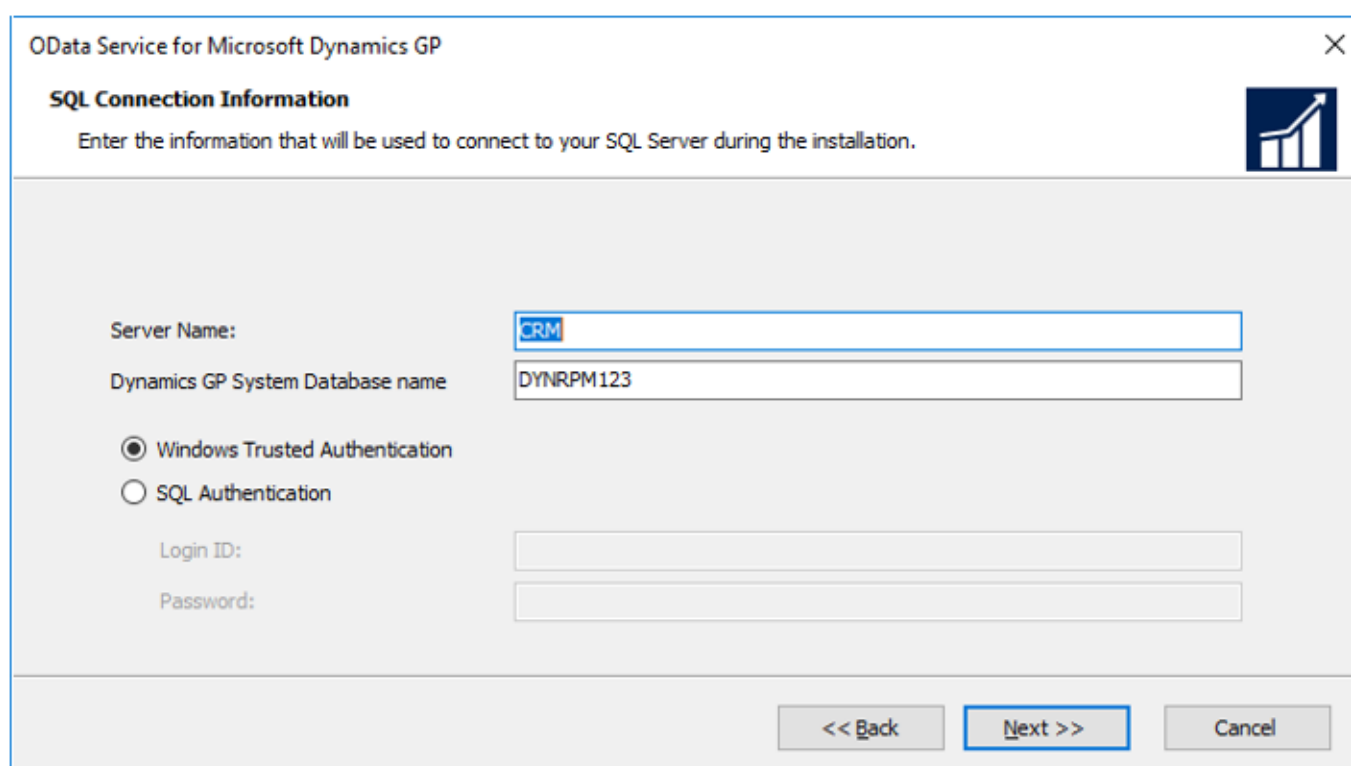
In this step, you'll deploy the 'GP OData Service' by running setup.exe from the Dynamics GP

DVD. This process creates a URL endpoint that allows for secure data access when building reports. It also ensures that only authenticated users with the appropriate permissions can access the data.

1. Run **setup.exe** from the Dyamics GP installation image.
2. Choose **GP ODataService** from the list. Then choose **Install** from the drop-down.



3. Select the **Accept the License Agreement** box and click **Next**.
4. Enter the authentication information for your SQL Server. Then click **Next**.



- For most situations, we recommend purchasing an SSL certificate to be used for this service. However, there may be some situations where you may be able to create a self-signed certificate in IIS for this purpose. Be sure that the Host Name matches the host name in the SSL certificate you are using.
- Enter the credentials for the domain account that will run the service. Then click **Next**.

- Click **Finish** to complete the GP OData Service installation.

Part 2: Install RPM Connector for GP



Please read these instructions in their entirety before installing this software. We recommend you don't run any other Windows programs while installing this program.



If this is an upgrade from a previous build of the RPM Connector for GP, we strongly recommend that you backup any changes that you have made to any views that start with RPMView, stored procedures that start with usp_RPM, and triggers that start with RPM. Under normal circumstances, changes to these SQL objects will be retained, but a backup is still recommended.

Note that the above does not apply to stored procedure usp_RPMSyncQueue or trigger RPM_RPM0010_INSERT. These SQL objects will always be replaced when upgrading.

Important: Extract the files and folders in the zip file you downloaded to a folder where you can easily access it. You will want to be able to access the folder from all workstations where you are going to install.

Workstation Installation Instructions

- 1 On each computer where you wish to install Rockton Pricing Management (RPM), right-click the RPM setup file (**RPMSetup.exe**) and click **Run as administrator**.
- 2 Browse to the folder where Dynamics GP is installed if the correct path does not default for you.



Important! Install the RPM Connector to the same directory where Dynamics GP is installed. If the default directory on the RPM Connector for Microsoft Dynamics GP Installation Wizard is not the same as the Dynamics GP installation directory, modify the default directory. If you enter this incorrectly, RPM will not function.

4. Click **Install**. This will copy RPM.cnk and any other pertinent files as appropriate. It will also install other components required to run RPM. In some instances, you may need to reboot your system after the installation is complete.
5. Verify the Status shows "Installed Successfully." for each item listed, (you will need to scroll down to see all items), then click **Exit**.
6. To include the new chunk file code, launch Dynamics GP. Right-click the Dynamics GP icon, click **More**, then click **Run as administrator**. The following message should appear:

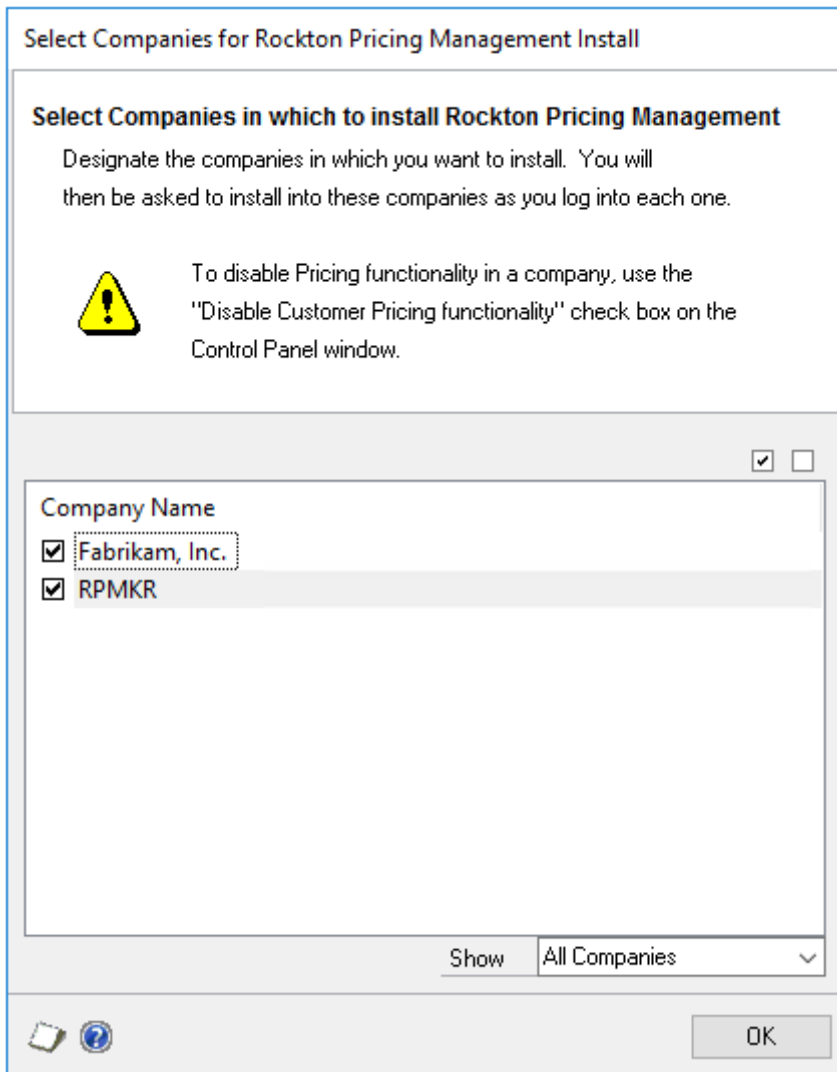
New code must be included in the DYNAMICS.SET dictionary. Do you wish to include new code now?

7. Click **Yes**. This process will modify your DYNAMICS.SET file to include information relating to RPM, and the RPM.cnk file will create an RPM.DIC file.
8. Log in using a User who has sufficient SQL Server permissions to create Tables and Triggers. This user must either be in the 'sysadmin' fixed server role or the 'db_owner' role for the DYNAMICS database. Additionally, this User must be assigned to either the RPM ADMIN or POWERUSER Security Role within Dynamics GP.

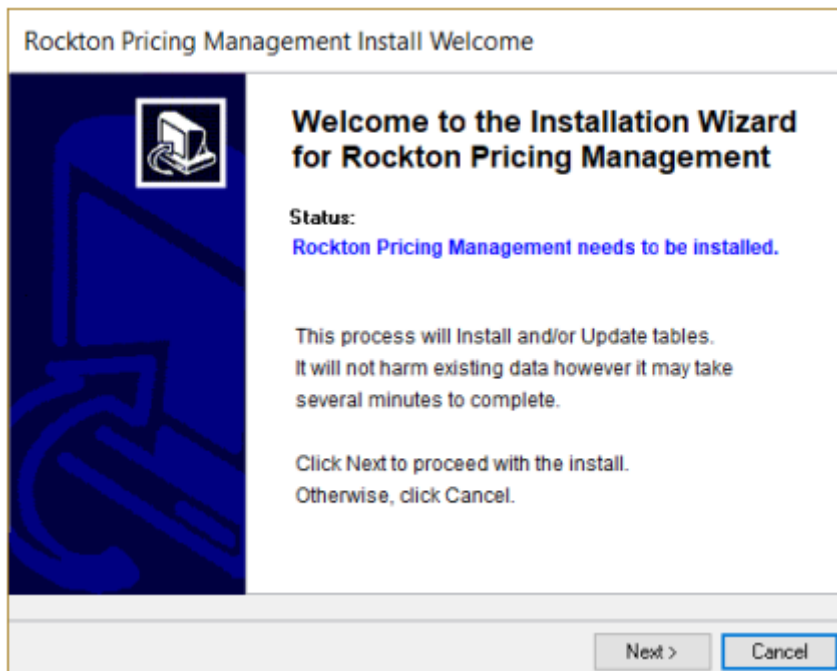


For new installation of RPM (not upgrades from a previous build), log in as a User in the POWERUSER Security role. This is because the RPM ADMIN role has not yet been created.

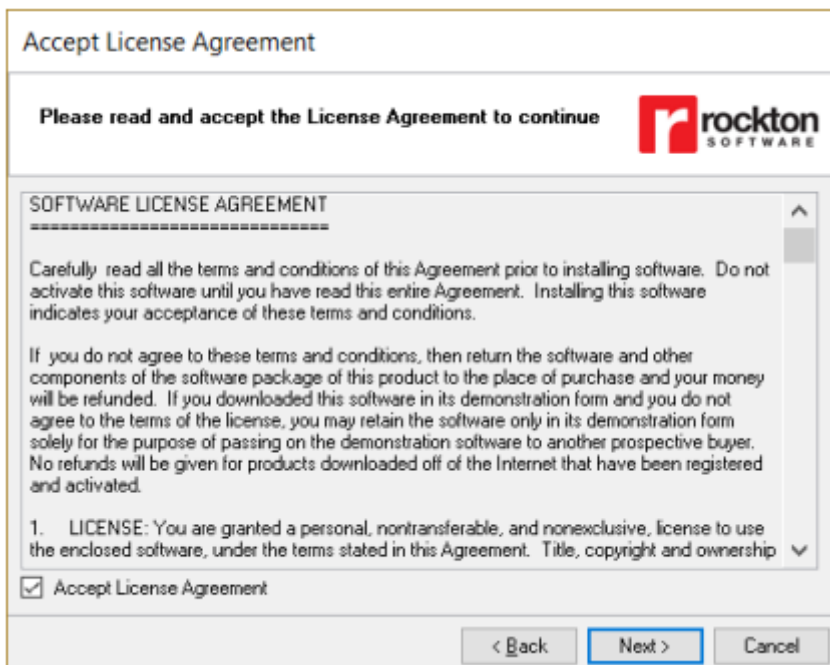
9. Log into any company where you plan to use RPM. RPM maintains data at the system and company levels; therefore, it is necessary to install the software in each Dynamics GP company where you intend to use RPM.
10. The "Select Companies for Rockton Pricing Management Install" window will open. Mark the companies where you intend to install RPM, then click **OK**.



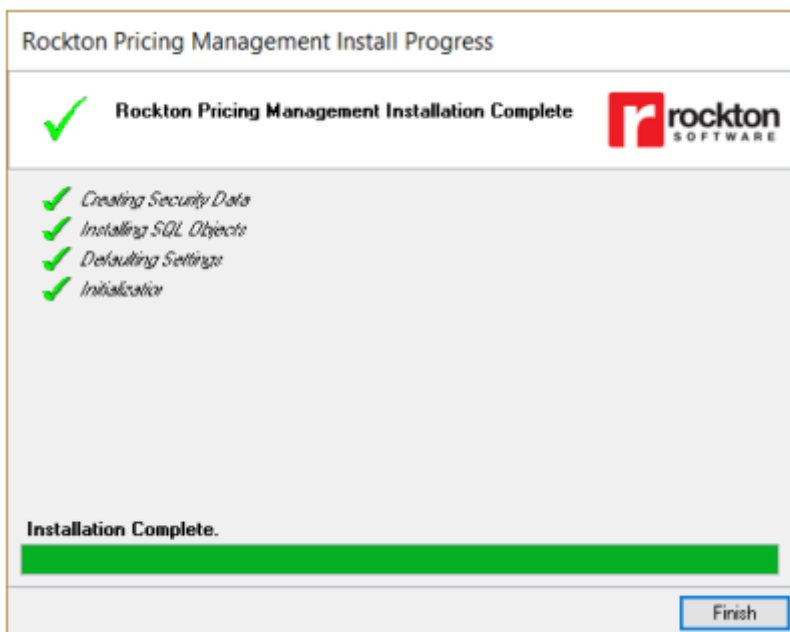
11. Next, the RPM install Welcome window will open. Note the status message. This indicates whether you will be installing for the first time or upgrading from an earlier build.



12. Click **Next** to review the License Agreement.



13. Check the **Accept License Agreement** box and click **Next** to launch the Install Progress dialog. During the installation, you may see some informational messages. Take note of these messages, and click **OK** or respond to them as necessary.



When the installation has completed, click **Finish**. The Rockton Pricing Management Status window will open. Take note of any messages and click **OK**. You will then see this dialog:

Would you like to install Rockton Pricing Management for another company, or have you finished?

15. Click 'Another' to open the Company Login window. Log in to the next company, then repeat steps 8-14 for each additional Company. After the last Company has been installed, click 'Finished'.
16. Log out of Dynamics GP and log back in to see RPM Connector for GP features.
17. Verify the installation. Enter a transaction on the Sales Transaction Entry window to test at least one RPM pricing scenario using different user types (POWERUSER, RPM Administrator, regular user, etc., as appropriate) in a company other than Fabrikam.

This completes the installation process for the first workstation. You can now install RPM on all other workstations by following steps 1-7 outlined above. No further workstation-specific installation is required.

Part 3: Complete OData Configuration in Dynamics GP

1. Log into Dynamics GP using the 'sa' account or another account that has permissions to access the Security and OData windows under **Tools | Setup | System**.
2. Verify that the GP user created in step 7 of the Complete prerequisites section is tied to the Windows AD account you created for step 6 of that section.

3. Ensure that the GP user has been granted security access to the appropriate roles (the ones starting with OD). If you are unsure, choose the OD POWERUSER* role.

User Security Setup - TWO (sa)

Save Clear Copy Additional File Print Tools Help Add Note Debug

Actions Additional File Tools Help Debug

User: Jimp Jim Pelikszka

Company Fabrikam, Inc.

User Type Full

Roles:

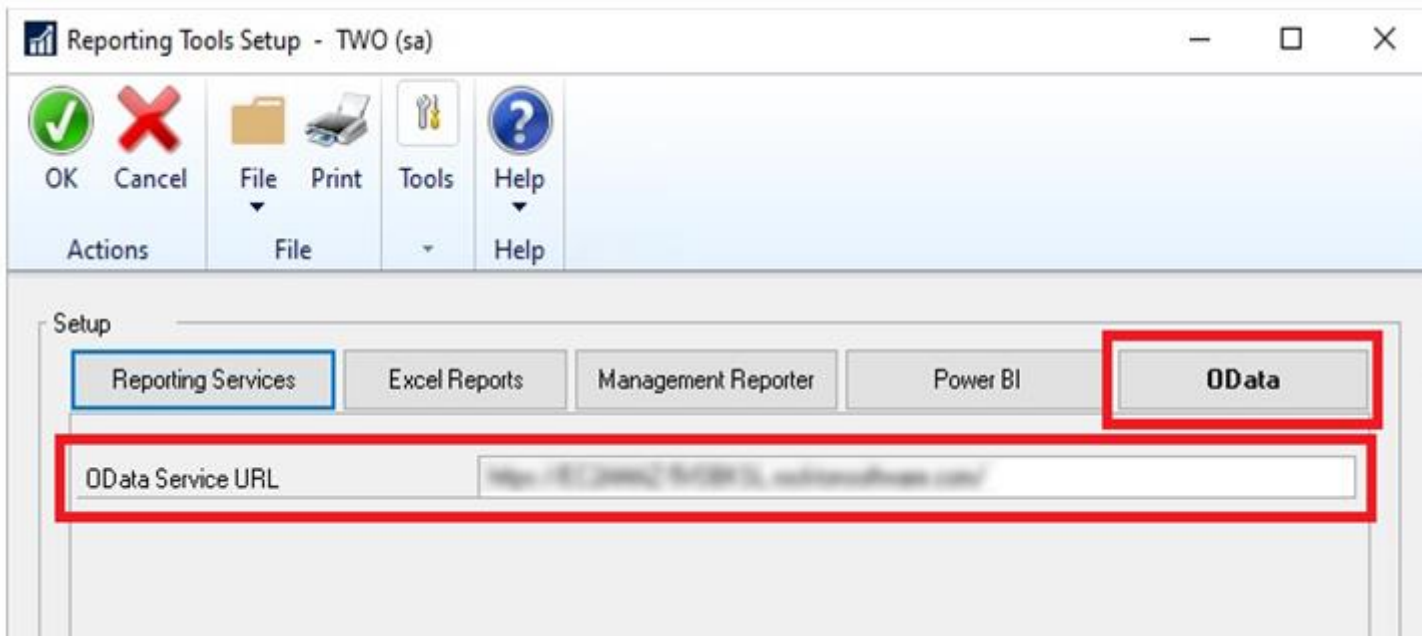
☐ Display Selected Roles

Security Role ID	Name
<input checked="" type="checkbox"/> OD_ACCOUNTING MANAGER*	Odata Accounting Manager
<input checked="" type="checkbox"/> OD_AP COORDINATOR*	OD_AP COORDINATOR
<input checked="" type="checkbox"/> OD_AR COORDINATOR*	Odata Accounts Receivable Coordinator
<input checked="" type="checkbox"/> OD_BOOKKEEPER*	Odata Bookkeeper
<input checked="" type="checkbox"/> OD_CERTIFIED ACCOUNTANT*	Odata Certified Accountant
<input checked="" type="checkbox"/> OD_COLLECTIONS MANAGER*	Odata Collections Manager
<input checked="" type="checkbox"/> OD_CUSTOMER SERVICE REP*	Odata Customer Service Representative
<input checked="" type="checkbox"/> OD_DISPATCHER*	Odata Dispatcher
<input checked="" type="checkbox"/> OD_EXECUTIVE*	Odata Executive
<input checked="" type="checkbox"/> OD_HR ADMINISTRATOR*	Odata HR Administrator
<input checked="" type="checkbox"/> OD_MATERIALS MANAGER*	Odata Materials Manager
<input checked="" type="checkbox"/> OD_OPERATIONS MANAGER*	Odata Operations Manager
<input checked="" type="checkbox"/> OD_ORDER PROCESSOR*	Odata Order Processor
<input checked="" type="checkbox"/> OD_PAYROLL*	Odata Payroll
<input checked="" type="checkbox"/> OD_POWER USER*	Odata Power User
<input checked="" type="checkbox"/> OD_PRODUCTION MANAGER*	Odata Production Manager
<input checked="" type="checkbox"/> OD_PRODUCTION PLANNER*	Odata Production Planner
<input checked="" type="checkbox"/> OD_PROJECT MANAGER*	Odata Project Manager
<input checked="" type="checkbox"/> OD_PURCHASING AGENT*	Odata Purchasing Agent
<input checked="" type="checkbox"/> OD_PURCHASING MANAGER*	Odata Purchasing Manager
<input checked="" type="checkbox"/> OD_SALES MANAGER*	Odata Sales Manager
<input checked="" type="checkbox"/> OD_SHIPPING RECEIVING*	Odata Shipping and Receiving

Alternate/Modified Forms and Reports ID: DEFAULTUSER

AFA Reports

4. Navigate to **Tools | Setup | System | OData | Configure OData Service**.
5. In the **OData tab**, enter the OData Service URL in the following format:
https://<computer name>.<domain name>.com/
****Important:** ensure you include the trailing slash at the end of the URL.
6. Click **OK** to finalize the configuration.



7. Navigate to **Tools | Setup | System | OData | Data Sources** within Dynamics GP.
8. For the Product, select **Microsoft Dynamics GP**.
9. For the Database, select a company database where you want to use RPM.
10. For the Object Type, select **Views**.

Data Sources - TW186 (sa)

OK
 Add Objects
 Refresh
 Additional
 File
 Tools
 Help
 Add Note

Product: Microsoft Dynamics GP
 Database: TW186 (Fabrikam, Inc.)
 Object Type: Views
 Mark All
 Unmark All

	Name	Object Type	Date Modified
<input type="checkbox"/>	AccountSummary	Views	2/8/2024
<input type="checkbox"/>	AccountTransactions	Views	2/8/2024
<input type="checkbox"/>	Accounts	Views	2/8/2024
<input type="checkbox"/>	BankTransactions	Views	2/8/2024
<input type="checkbox"/>	MultidimensionalAnalysis	Views	2/8/2024
<input type="checkbox"/>	TaxDetailTransactions	Views	2/8/2024
<input type="checkbox"/>	CustomerAddress	Views	2/8/2024
<input type="checkbox"/>	CustomerItems	Views	2/8/2024
<input type="checkbox"/>	Customers	Views	2/8/2024
<input type="checkbox"/>	ReceivablesApply_Open	Views	2/8/2024
<input type="checkbox"/>	ReceivablesTransactions	Views	2/8/2024

- Click the Name column header to sort by Name. Then scroll down to find the views that start with RPMView. If you don't see any views that start with RPMView, then click the **Add Objects** Button to open the Customer Data Sources window. Mark all views that start with RPMView and click **OK**.

Custom Data Sources

☒ OK

Database: Tw186 (Fabrikam, Inc.)

Object Type: Views

Mark All Unmark All

	Name	Object Type	Date Modified
<input type="checkbox"/>	rmWorkTransactions	Views	2/8/2024
<input checked="" type="checkbox"/>	RPMViewCustomer	Views	4/29/2024
<input checked="" type="checkbox"/>	RPMViewGLAccount	Views	4/29/2024
<input checked="" type="checkbox"/>	RPMViewItem	Views	4/29/2024
<input checked="" type="checkbox"/>	RPMViewItemCurrency	Views	4/29/2024
<input checked="" type="checkbox"/>	RPMViewLocationCode	Views	4/29/2024
<input checked="" type="checkbox"/>	RPMViewPriceLevel	Views	4/29/2024
<input checked="" type="checkbox"/>	RPMViewUofM	Views	4/29/2024
<input checked="" type="checkbox"/>	RPMViewUofMSchedule	Views	4/29/2024
<input type="checkbox"/>	RTVSerialLot_Work	Views	2/8/2024
<input type="checkbox"/>	SalesSerialLot	Views	2/8/2024

12. On the Data sources window, select all views that start with RPMView (you may need to refresh if you did step 11). Then click **OK**.
13. Repeat steps 7-12 for each company database where you will be using RPM.
14. Navigate to **Tools | Setup | System | OData | Publish OData**.
15. Mark the Publish column for RPMView objects that you want to synchronize with RPM.
16. Take note of the OData URL column. You will use these URLs to test the OData setup later.
17. Click **OK**.

Publish Odata - TWO (sa)

OK File Print Tools Help Add Note

Actions File Help

Product: Microsoft Dynamics GP Object Type: All Database: TWO (Fabrikam, Inc.) Mark All Unmark All

Object type	Object Name	Service Name	Publish	OData URL
Views	RPMViewCustomer	RPMViewCustomer	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewCust
Views	RPMViewItem	RPMViewItem	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewItem
Views	RPMViewItemCurrency	RPMViewItemCurrency	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewItem
Views	RPMViewLocationCode	RPMViewLocationCode	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewLoc
Views	RPMViewPriceLevel	RPMViewPriceLevel	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewPrice
Views	RPMViewUoM	RPMViewUoM	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewUoM
Views	RPMViewUoMSchedule	RPMViewUoMSchedule	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewUoM
Views	RPMViewCurrency	RPMViewCurrency	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewCur
Views	RPMViewGLAccount	RPMViewGLAccount	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewGLA
Views	RPMViewPriceSheet	RPMViewPriceSheet	<input checked="" type="checkbox"/>	https://[server]/[port]/[path]/com/GP/OData/TWO/RPMViewPrice

*Users with a SQL Database Owner role will inherit security access to all published OData objects.

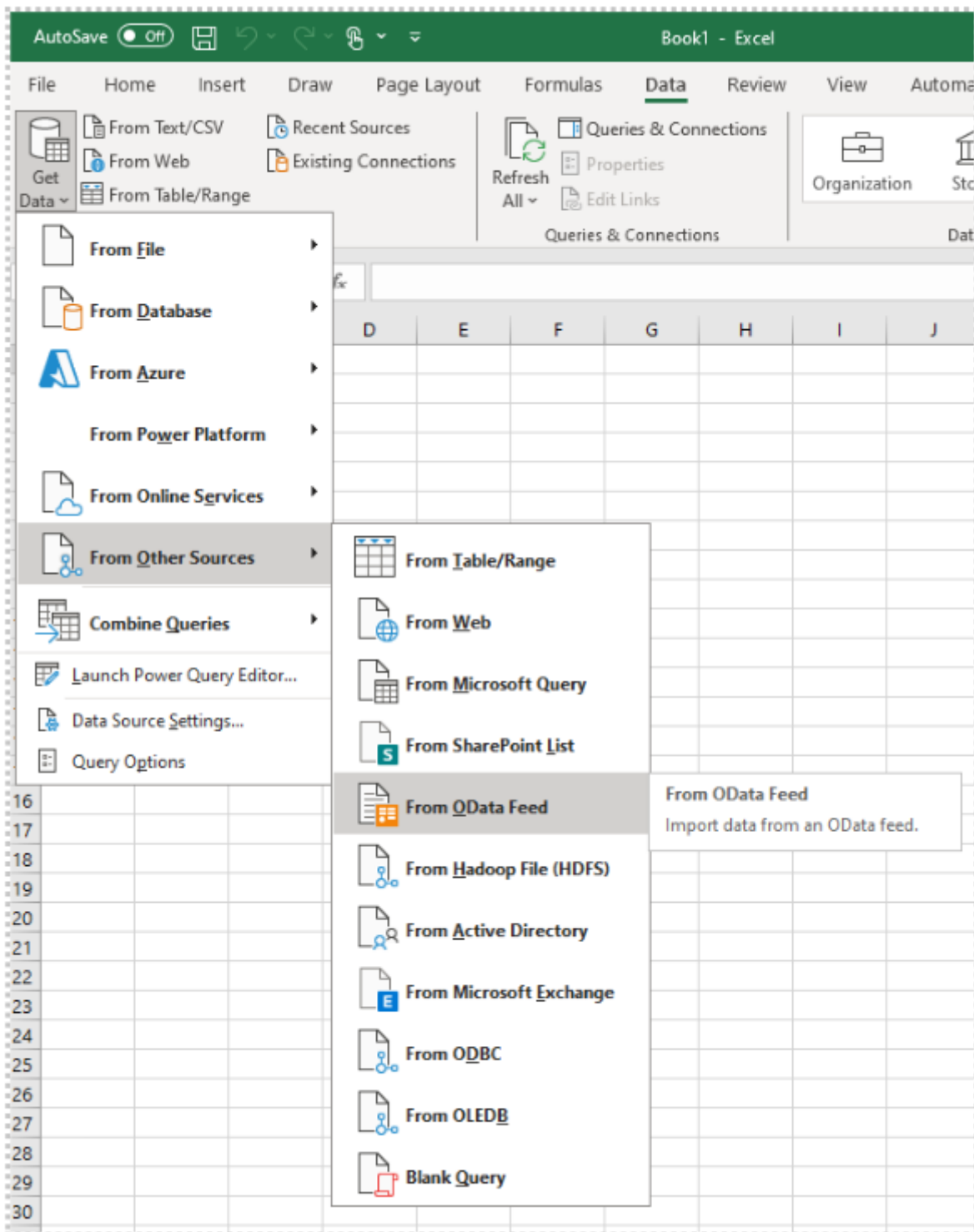
Part 4: Test the OData Connection

Test the OData Connection using a Browser

1. Navigate to **Tools | Setup | System | OData | Publish OData** within Dynamics GP.
2. Find the first object that starts with RPMView; copy the OData URL to your clipboard.
3. Open a browser and paste this URL into the address bar.
4. You should see results from that view, in JSON format, delivered via OData. If it was not successful, go to the next section Test the OData setup using Excel.
5. If it was successful, continue with step 2 for the next object in the list that starts with RPMView. If all objects can be displayed successfully, then your OData setup is complete.

Test the OData Connection using Excel

1. Open Excel by right-clicking and choosing Run as administrator.
2. In Excel, choose the 'Data' tab, then choose Get Data > From Other Sources > From OData Feed.



3. You may see the OData feed dialog below. Navigate back to the Publish OData window in Dynamics GP by going to **Tools > Setup > System > OData > Publish OData**.
4. Copy one of the displayed URLs.
5. Paste the URL into the Data Feed dialog box, ensuring to include only up to and including the database name, followed by a slash.

OData feed

☒ Basic ☐ Advanced


URL

OK Cancel

6. If you see the OData Feed Connection dialog below, select Windows from the green panel on the left.
7. Choose **Use alternate credentials**.
8. Enter the credentials for the AD user you set up earlier in the Prerequisites section.
9. Click **Save** to apply the settings.

OData feed

☒ Anonymous ☐ Windows ☐ Basic ☐ Web API ☐ Organizational account

 <https://ec2amaz-5vobk5l-rocktonsoftware.com/GP...>

Use your Windows credentials to access this OData feed.

☐ Use my current credentials

☒ Use alternate credentials

User name

Password

Save Cancel

Note: You can also access this window by choosing the Get Data button > Data Source Settings. Then, select the data source you entered earlier in the OData Feed dialog and choose the Edit Permissions button. On the Edit Permissions window, choose the Edit button.

10. You should now see the Navigator window below. From here, you can select any of your OData sources to see a preview on the right side, or choose the Load button to load these results into Excel.

Navigator

Select multiple items

Display Options

https://... C...

- RPMViewCustomer
- RPMViewGLAccount
- RPMViewItem
- RPMViewItemClass
- RPMViewItemCurrency
- RPMViewLocationCode
- RPMViewPriceLevel
- RPMViewUoRM
- RPMViewUoRMSchedule

RPMViewCustomer

Preview downloaded on Friday, April 12, 2024

CUSTNMBR	CUSTNAME	CUSTCLAS	SLPRSNID
SVCRETURN01	Service		
COMTELPAD0001	Comtel-Page Inc.	USA-IAKSNE-T3	NANCY B.
FRANCHIS0001	Franchise Office Machines	USA-ILMO-T1	PAUL W.
SINCLAIR0001	Sinclair State University	USA-ILMO-T1	PAUL W.
LONDONBE0001	Londonberry Nursing Home	NEWZEALAND-T8	IAN M.
CELLULAR0001	Cellular Express	USA-ILMO-T1	PAUL W.
FOURTHCO0001	Fourth Coffee	USA-IAKSNE-T3	NANCY B.
REYNOLDS0001	Reynolds State College	USA-INMI-T2	GREG E.
ATMORE0001	Atmore Retirement Center	USA-ILMO-T1	PAUL W.
LASERMES0001	Laser Messenger Service	USA-MNWI-T4	SANDRA M.
PLACEMAD0001	Place & MacDero Associates	CAN-ABBCYKNWTT7	ERIN J.
DOLLISCO0001	Dollis Cove Resort	CAN-PQMT-T5	FRANCINE B.
DOWNTOWN001	Downtown Hotel	USA-ILMO-T1	PAUL W.
FABRETURN01	Fabrikam Returns		
ADVANCED0001	Advanced Paper Co.	USA-ILMO-T1	PAUL W.
CENTRALC0001	Central Communications LTD	USA-ILMO-T1	PAUL W.
GREENWAY0001	Greenway Foods	USA-ILMO-T1	PAUL W.
NORTHERN0001	Northern State College	USA-ILMO-T1	PAUL W.
SNELLING0001	Snelling Communications Inc.	USA-ILMO-T1	PAUL W.
CRAWFORD0001	Crawfords, Inc.	USA-ILMO-T1	PAUL W.
HOLLINGC0001	Holling Communications Inc.	USA-ILMO-T1	PAUL W.
ALTONMAN0001	Alton Manufacturing	USA-INMI-T2	GREG E.

Select Related Tables

Load Transform Data Cancel

11. If Excel is not available, you may also use a similar approach to test using Power BI.

5.3. Uninstalling GP OData Service and the RPM Connector for GP

Uninstalling the GP OData Service

If you are not using the GP OData service for anything besides RPM, you can optionally uninstall it as follows:

1. Log in to the server where GP OData service was initially installed.
2. Run **setup.exe** from the Dynamics GP installation image.
3. Choose **GP OData Service** from the list. Then choose **Install** from the drop-down.
4. Choose **Remove** from the Program Maintenance dialog.
5. Follow the steps to completely uninstall the GP OData service.

If you wish to keep the GP OData service installed, you should remove the RPM data sources from it as follows:

1. Log in to the Dynamics GP client where the GP OData service was initially installed.

2. Unpublish RPM data sources by going to **Tools | Setup | System | OData | Publish OData**.
3. Select a database that has the RPM Connector for GP installed.
4. Unmark the Publish column for each RPMView object.
5. Repeat steps 3 and 4 for each company with the RPM Connector for GP installed.
6. Click **OK** to close the Publish window.
7. Remove RPM data sources by going to **Tools | Setup | System | OData | Data Sources**.
8. For Product, select Microsoft Dynamics GP for Product. For Database, select a company database where the RPM Connector for GP is installed. For Object Type, select Views. Click the Name column header to sort by Name.
9. Scroll down to find the views that start with RPMView. Unmark all views that start with RPMView.
10. Repeat step 9, selecting each company where the RPM Connector for GP was installed.
11. Click **OK** to close the Data Sources window.

Uninstalling the RPM Connector for GP

To completely uninstall the RPM Connector from your workstation and server, follow these steps:

1. Log in to Dynamics GP as any User with 'sysadmin' fixed server role or the 'db_owner' role for the DYNAMICS database.
2. Open the Rockton Pricing Management Setup window and click the Uninstall tab.
3. Click **Complete Uninstall** to completely uninstall from the server, or click **Workstation Uninstall** to remove it from the current workstation only.
4. Click **OK** on the message to close Dynamics GP.
5. Delete the following files from the Dynamics GP install folder (not all of them may be present):

RPM.DIC	PMTransaction.mac
RPM.cnk	RMTransaction.mac
RPM.VBA	SOPTransaction.mac
RPM_RocktonLicenseAgreement.txt	RocktonSoftware.RPMConnectorForGP.dll
Rockton Pricing Management Read Me.txt	Rockton Pricing Management Manual.pdf
SyncQueueInsertTrigger.sql	Rockton Pricing Management What's New.pdf
usp_RPMSyncQueue.sql	Any .sql files beginning with RPMView

6. Delete any files beginning with RPM from the Dynamics GP Data folder.
7. If you selected Complete Uninstall in step 3, log in to Dynamics GP with a User having access to the Security windows, and remove the RPM ADMIN Security Role and the ADMIN_RPM_01 Security Task.

Manually Uninstalling

Use the following steps to manually uninstall the RPM Connector.

Manually uninstalling from a Workstation

Perform these steps on each workstation where you want to remove the RPM Connector.

1. Edit the Dynamics.set file (found in the Dynamics GP installation directory) to remove the RPM Connector entries. Follow these three steps:
 - a. The first line in the file should be a number. Subtract 1 from this number.
 - b. Remove these two lines.
 - 8225
 - Rockton Pricing Management
 - c. In the lower section of the file, you will find several path names. Remove those lines that reference the following dictionaries:
 - RPM.DIC
 - FRMS8225.DIC
 - RPTS8225.DIC.
2. Delete the following files from the Dynamics GP installation folder (not all of them may be present):

RPM.DIC	PMTransaction.mac
RPM.cnk	RMTransaction.mac
RPM.VBA	SOPTransaction.mac
RPM_RocktonLicenseAgreement.txt	RocktonSoftware.RPMConnectorForGP.dll
Rockton Pricing Management Read Me.txt	Rockton Pricing Management Manual.pdf
SyncQueueInsertTrigger.sql	Rockton Pricing Management What's New.pdf
usp_RPMSyncQueue.sql	Any .sql files beginning with RPMView

3. If you plan to re-install RPM, skip this step. However, if you do not plan to re-install RPM, delete the following files from the Dynamics GP Data folder (not all of them may be present):
 - FRMS8225.DIC
 - RPTS8225.DIC

Manually uninstalling from the Server

Follow these steps to completely remove the RPM Connector from the system.

1. Launch SQL Server Management Studio.
2. Drop all tables in the DYNAMICS database that are named as follows:
 - RPMXX (*where xx represents the table number*)
3. Drop all stored procedures in the DYNAMICS database names as follows:
 - zDP_RPMxxYYY (*where xx is the table number and YYY is one of 11 possible suffixes*)
4. Drop all Views on each company database whose names begin with RPMView.

5. Drop the usp_RPMSyncQueue stored procedure.
6. Drop triggers from the following tables that are named as follows:
RPM <tablename> INSERT
RPM <tablename> UPDATE

Database	Table Name
DYNAMICS	MC40200
Each company database	GL00100, IV00101, IV00105, IV00108, IV40201, IV40202, IV40400, IV40700, IV40800, RPM00101

7. Log in to Dynamics GP with a User having access to the Security windows and remove the RPM ADMIN Security Role and the ADMIN RPM 01 Security Task.

5.4. Omni Price Migration

If you are migrating from Rockton Software's Omni Price product to Rockton Pricing Management (RPM), you can have both Omni Price and the RPM Connector products installed together, however, pricing will not be derived from the contracts in Omni Price. The benefit to having it installed is two-fold. First, you are still able to refer to any history that may be stored in Omni Price. Second, it may be useful to refer to your Omni Price Contract and Filter configuration while setting up RPM.

If you have both products installed, you will receive the following message after logging into Dynamics GP:

Rockton Omni Price will have limited functionality since Rockton Pricing Management is also installed. You will still be able to review setup information, but pricing calculations and other functionality will be disabled for Omni Price.

5.5. About Rockton Pricing Management

Help | About Microsoft Dynamics GP | Additional | About Rockton Pricing Management

The About Rockton Pricing Management window displays the version of the Rockton Pricing Management Connector currently installed.



This window also provides the phone number to use to contact Rockton Software, and a link to our website.

6. Navigation and Settings Overview

Navigation and Settings Overview

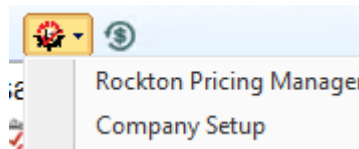
6.1. RPM Navigation

Menu

There are multiple ways you may access the Rockton Pricing Management (RPM) windows within Dynamics GP. To open most of these windows, start by going to the RPM Setup menu within Dynamics GP. Navigate to **Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management** and then select the specific window you wish to use from the list.

Toolbar

After RPM is installed, shortcuts are added to the toolbar. The RPM icon on the toolbar provides access to a list of RPM windows that can be opened directly from the shortcut. Additionally, there is another icon on the toolbar that is a shortcut to the Process Rebates window.



6.2. RPM Security Settings

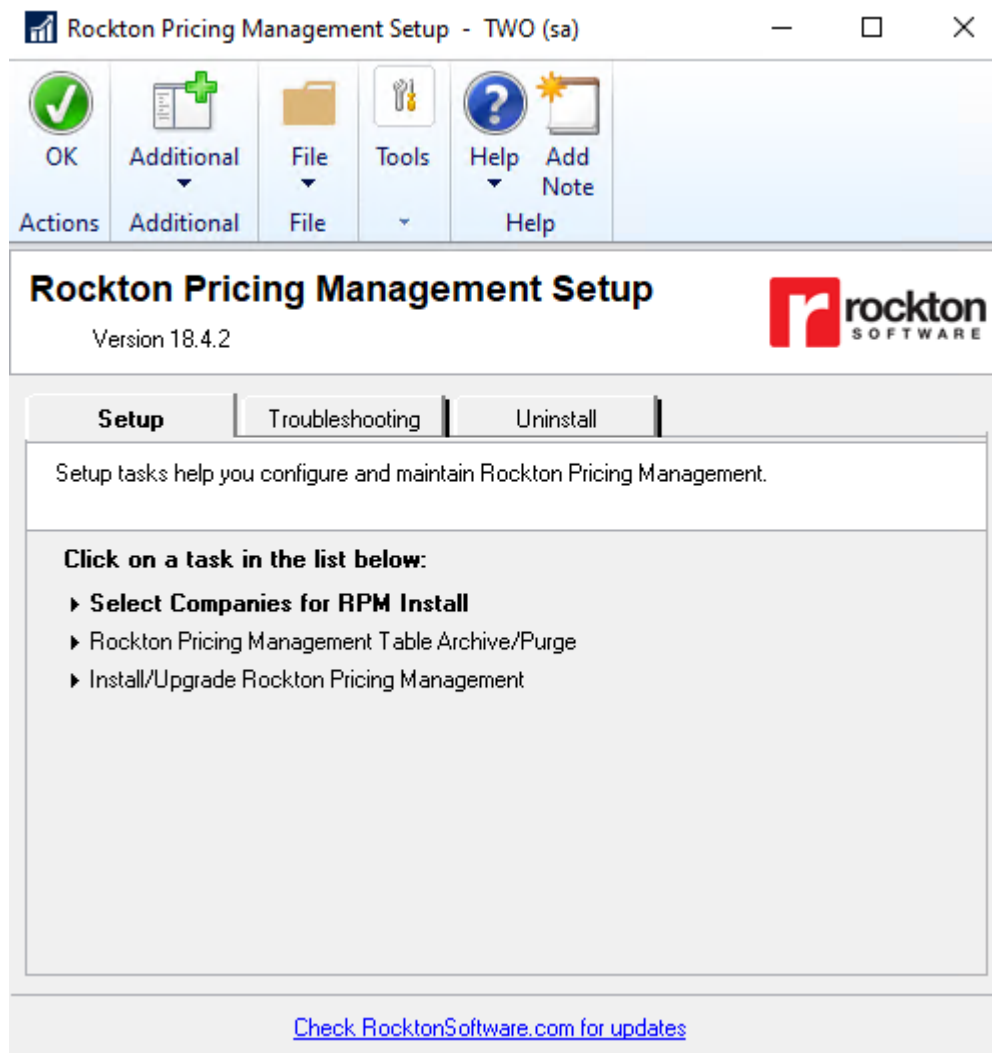
Security in RPM can be administered via the following Security Items:

- RPM ADMIN Security Role
Used to set access to an Administrator of RPM.
- ADMIN_RPM_01 Security Task
Contains all windows necessary to setup and administer RPM. Typical Users do not need to have access to these windows.
- DEFAULTUSER Security Task
Contains all the windows that are required for the average User to be able to use RPM. No setup or administration windows are included.

6.3. Rockton Pricing Management Setup

Description

The Rockton Pricing Management Setup window allows you to perform setup and maintenance tasks. You can access this window by using the Rockton Pricing Management (RPM) shortcut available on the toolbar. To access this window, ensure that you are logged in as a User in the RPM ADMIN Security Role or the POWERUSER Security Role.



The Rockton Pricing Management Setup window provides access to all the necessary tasks for system configuration and maintenance. It is divided into three tabs:

- 1 Setup
- 2 Troubleshooting
- 3 Uninstall

To get a quick overview of each task, simply hover your cursor over any task in the list. To select a specific task, click on the task name.

If you click on the “Check RocktonSoftware.com for updates” link, you will be directed to the

[Downloads](#) web page for this product. Here, you can verify that you have the latest build installed.

Detailed descriptions of the tasks available in each tab can be found in the following tables:

Setup tab

Setup tasks help you configure and maintain Rockton Pricing Management.

Task	Description
Select Companies for RPM Install	Opens the window where you can select the companies in which you want to install RPM.
Rockton Pricing Management Table Archive/Purge	Opens the Table Archive/Purge window, where you can purge, archive, or restore tables from RPM.
Install/Upgrade Rockton Pricing Management	This action installs the software or upgrades it from a previous version. This process may take several minutes to complete and also configures table permissions for all users in the system database. You can execute this task multiple times without any adverse effects. Note: You must be logged in as a User who is in the 'sysadmin' fixed server role or the 'db_owner' role

Troubleshooting tab

These tasks are for troubleshooting purposes and may be asked for use by Rockton Support.

Task	Description
Re-add Security Data	This function adds Security Roles and Tasks for RPM, if they have been deleted. Note: You must be logged in as a User with access to run the Install/Upgrade option (as described above) or a User with Security access to both the Security Role Setup and Security Task Setup windows to use this option.
Move to First Position	Moves RPM to the first position in the launch file after Dynamics GP.
Remove from Launch File	Removes RPM from the launch file.
Rebuild Menus	Rebuilds menu navigation for RPM by first removing all menus from the Menu Master table. To complete the process, you must log in again to see the rebuilt menus.
Rebuild Toolbars	Removes and recreates default toolbar items for RPM.
Enable or Disable Script Logging	Enables or disables script logging either immediately or beginning the next time you log into Dynamics GP from this workstation.
Diagnostics Mode	This option may gather diagnostics, create log files, open the Code window, or other things that may be helpful to Rockton Support.

Uninstall tab

These tasks are for uninstalling RPM from a workstation or a complete uninstall.

Task	Description
Workstation Uninstall	Removes Rockton Pricing Management from the launch file. It also removes settings from the Defaults file.
Complete Uninstall	Rockton Pricing Management tables are removed from the database(s) and the product is removed from the launch file.

6.4. Document Attributes Setup

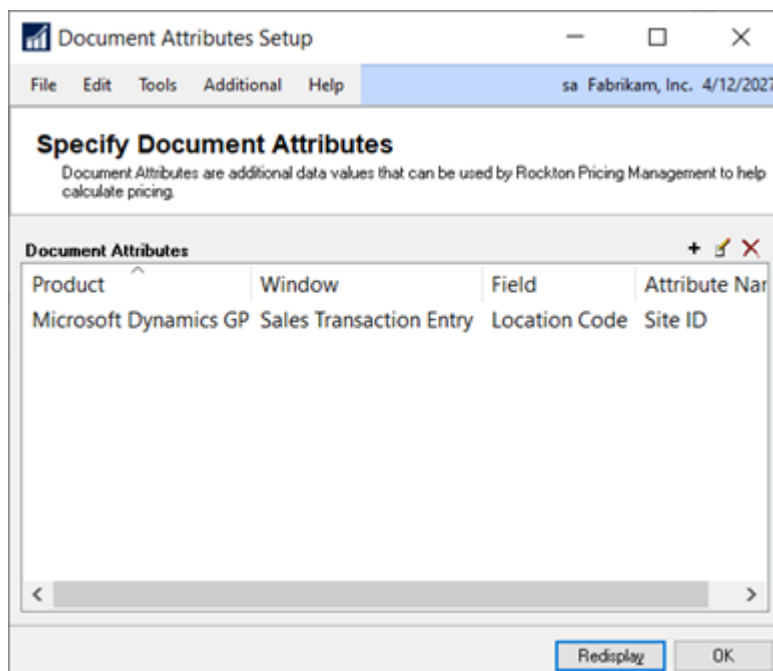
Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management | Document Attributes Setup

Description

This window is used to specify additional fields to be used in pricing calculations. When calculating a price on a sales document, Rockton Pricing Management (RPM) will use the following fields to determine that price:

- Customer Number
- Date
- Currency ID
- Item Number
- U of M
- Quantity
- Site ID
- Schedule ID
- Unit Price

You may find it useful to include other values from the sales transaction when determining a price. These added elements are referred to as Document Attributes. Within this window, you specify which Document Attributes should be passed to RPM each time it tries to calculate a price.



Add Document Attribute button

This button (+) enables you to define one or more new Document Attributes. When you click the button,

you will be presented with two options:

- Choose from Sales Transaction Entry window
- Select from a list of fields

Choose from Sales Transaction Entry window

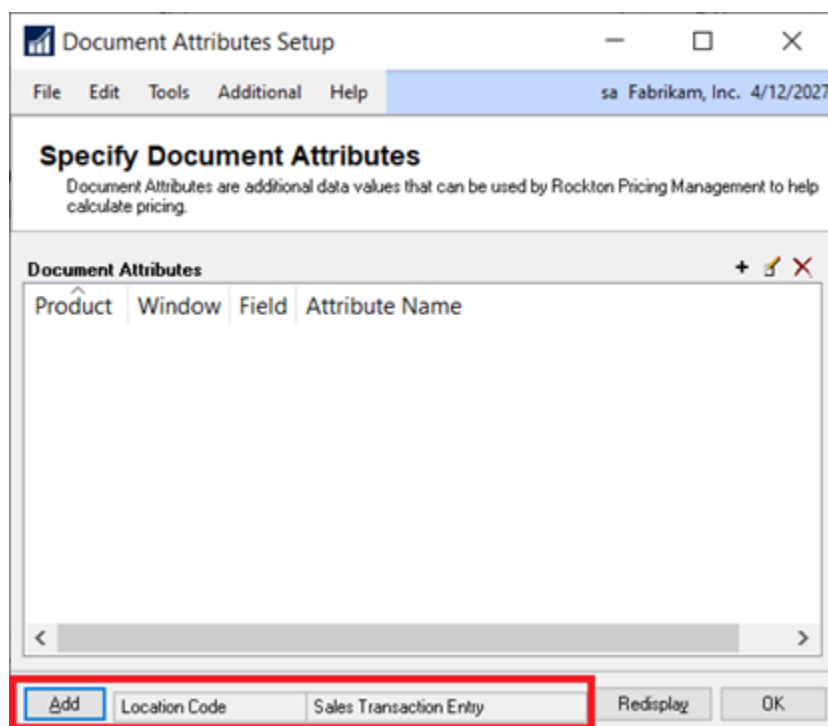
Select this option to access the Sales Transaction Entry window. You will see the following message:

Move your cursor to a Sales Transaction Entry window field that you want to be a Document Attribute.

*Then click Add at the bottom of the Document Attributes Setup window.
Repeat as needed.*

Determine which field from the Sales Transaction Entry window you would like to use to determine pricing and place your cursor in that field. It may be necessary to enter other relevant fields first to enable the desired field. At the bottom of the Document Attribute Setup window, you will see an "Add" button and the name of the field you have chosen as well as its window name.

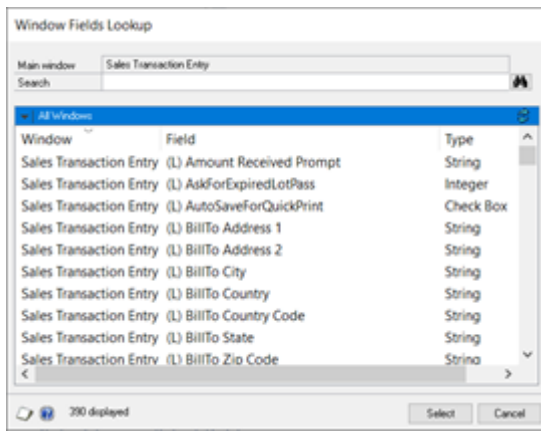
Note: Only fields that are included in the SOP_Line_Work table, which is the SOP101200 table, can be selected and added as a document attribute. If the field is not part of the SOP10200 table, a message will appear and not allow the selection of that field.



If the selections appear correct, click the "Add" button to include the chosen field in the Document Attributes list. Continue to select additional fields by moving to each field and clicking the "Add" button. Once you have finished, click "OK" in the Document Attributes Setup window.

Select from a list of fields

Choosing this option will open the Window Fields Lookup window:



You might prefer this method if the field you want is not visible on the Sales Transaction Entry window, but you know its name.

Choose a field from the list and click the "Select" button to add it to the Document Attributes list within the Document Attribute Setup window.

Note: Only fields that are part of the SOP10200 table are included in the list for selection.

Edit Document Attribute Name button

By clicking this button (✎) you can modify the attribute name of the Document Attribute you have chosen in the list. This name should match what you have defined for this attribute within the RPM web applicaiton.

Remove Document Attribute(s) button

This button (✖) permits you to delete Document Attributes from the list. You have the option to select multiple attributes and remove them by using the Ctrl or Shift keys.

To Create a Document Attribute:

1. Navigate to **Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management | Document Attributes Setup** or use the **RPM shortcut** and click **Document Attributes Setup**.
2. Click **Add Document Attribute (+)**.
3. Click **Choose from Sales Transaction Entry window** or **Select from a list of fields**, depending on the field you are adding as an attribute.
4. Confirm your choice by clicking **OK** to the prompt.
5. Click the field you wish to add as an attribute and then click **Add**.
6. Enter the name of the Document Attribute exactly as it is defined in RPM.
7. Add any additional attributes as needed, or click **OK** to close the windows.

To Edit a Document Attribute:

1. Navigate to **Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management | Document Attributes Setup** or use the **RPM shortcut** and click **Document Attributes Setup**.
2. Highlight the Document Attribute you want to edit and click **Edit Document Attribute**

Name (✎).

3. Enter the **Attribute Name** as it is defined in RPM.
4. Click **OK**.
5. To close the Document Attributes Setup window, click **OK**.

To Delete a Document Attribute:

1. Navigate to **Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management | Document Attributes Setup** or use the **RPM shortcut** and click **Document Attributes Setup**.
2. Highlight the Document Attribute you want to delete and click **Remove Document Attribute** (✕).
3. When prompted with a message confirming the delete, click **Delete**.
4. Click **OK** in the Document Attributes Setup window to close the window.

6.5. Report Options

Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management | Report Options

Description

This window is used to configure default options for reports available within Rockton Pricing Management (RPM).

Report

From the drop-down, select the report for which you wish to configure settings.

Batch Recalc Report - This report is generated after executing the Recalculate Batch option from the Sales Batches window in Dynamics GP.

Ask Each Time

Enable this check box if you want to receive a prompt to select the report location each time you print. When this check box remains unmarked, the report will print according to the settings designated in this window.

Screen

Mark this check box to automatically print the report to the screen each time.

Printer

Mark this check box to automatically print the report to a printer each time.

File

Mark this check box to automatically send the report to a file each time.

Insert Tokens

Click Current Date or Current Time to include these tokens in the file name. When the report is printed, these tokens will become part of the file name. For example, *BatchRecalcRpt%DATE%%TIME%*.

File Name

Specify the file name you want to assign to the report being saved to a file. Use the Insert Tokens to enhance the file name with descriptive information regarding when it was printed.

Sample

Displays an example of what the file name will look. This is especially helpful if you are using the tokens. For example, *BatchRecalcRpt101820231028PM*.

File Format

Choose the desired file format from the drop-down menu when printing the report to a file. The available options include:

- Text file
- Tab-delimited file
- Comma-delimited file
- HTML file
- XML Data file

Append

Select this option to append the existing file when printing the report to file.

Replace

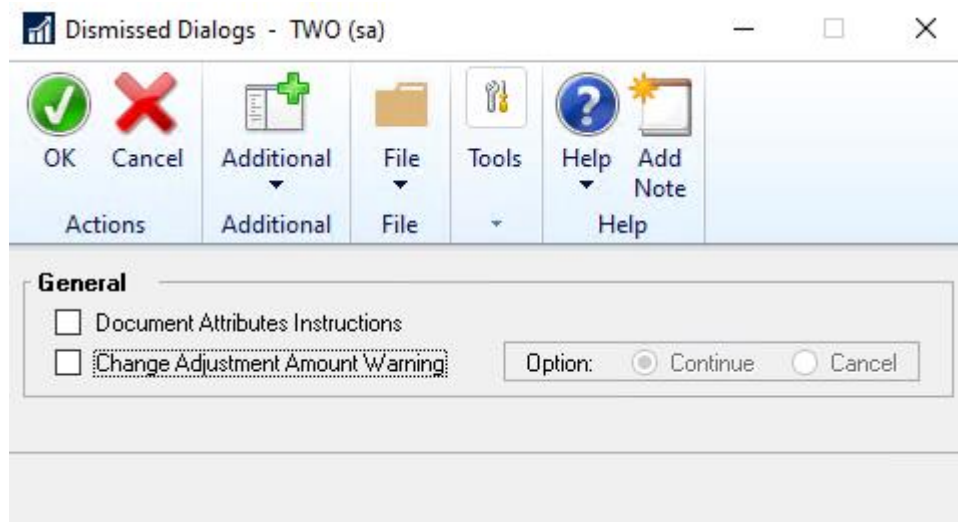
Select this option to replace the existing file with the new file when printing the report to file.

6.6. Dismissed Dialogs

Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management | Dismissed Dialogs

Description

In Rockton Pricing Management (RPM), some alert messages include a check box labeled "Don't show this message again" in the lower-left corner. Checking this box will prevent the message from appearing the next time you perform that action. If you decide you want to see the message again after dismissing it, you can modify the setting in the Dismissed Dialogs window by clearing the check box.



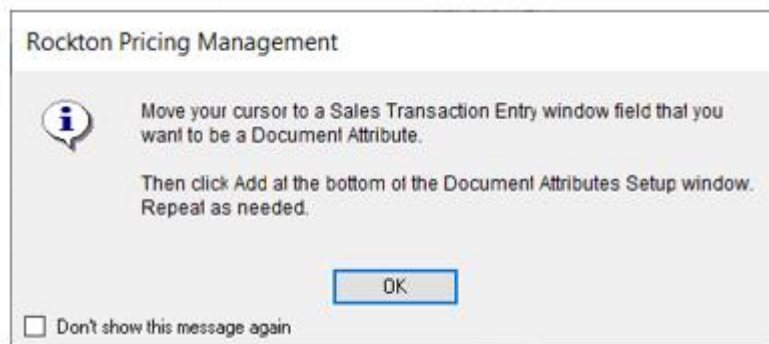
When you first enter this window, the messages that you have dismissed will be checked. By unchecking a message, it will be displayed the next time you perform the associated action. Similarly, any unchecked messages can be dismissed within this window by checking the respective check box.



Dismissed messages are specific to each user, so modifying these settings will only affect what you see, and not what other Users see.

Document Attributes Instructions

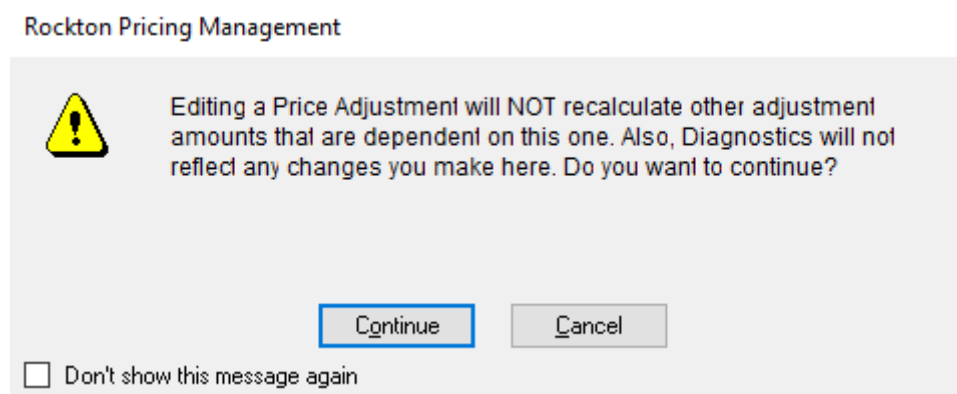
If you enable this option, the following message will no longer be displayed when you click the "Add Document Attribute" (+) button within the Document Attributes Setup window.



When you receive this message, you have the option to mark the "Don't show this message again" check box to prevent that message from reappearing. If you wish to be prompted with this message in the future, open the Dismissed Dialogs window and unmark the "Document Attributes Instructions" check box.

Change Adjustment Amount Warning

Enabling this option suppresses the message that you typically receive when editing a Price Adjustment. To reinstate this prompt, unmark the "Change Adjustment Amount Warning" option if you wish to receive the prompt again.

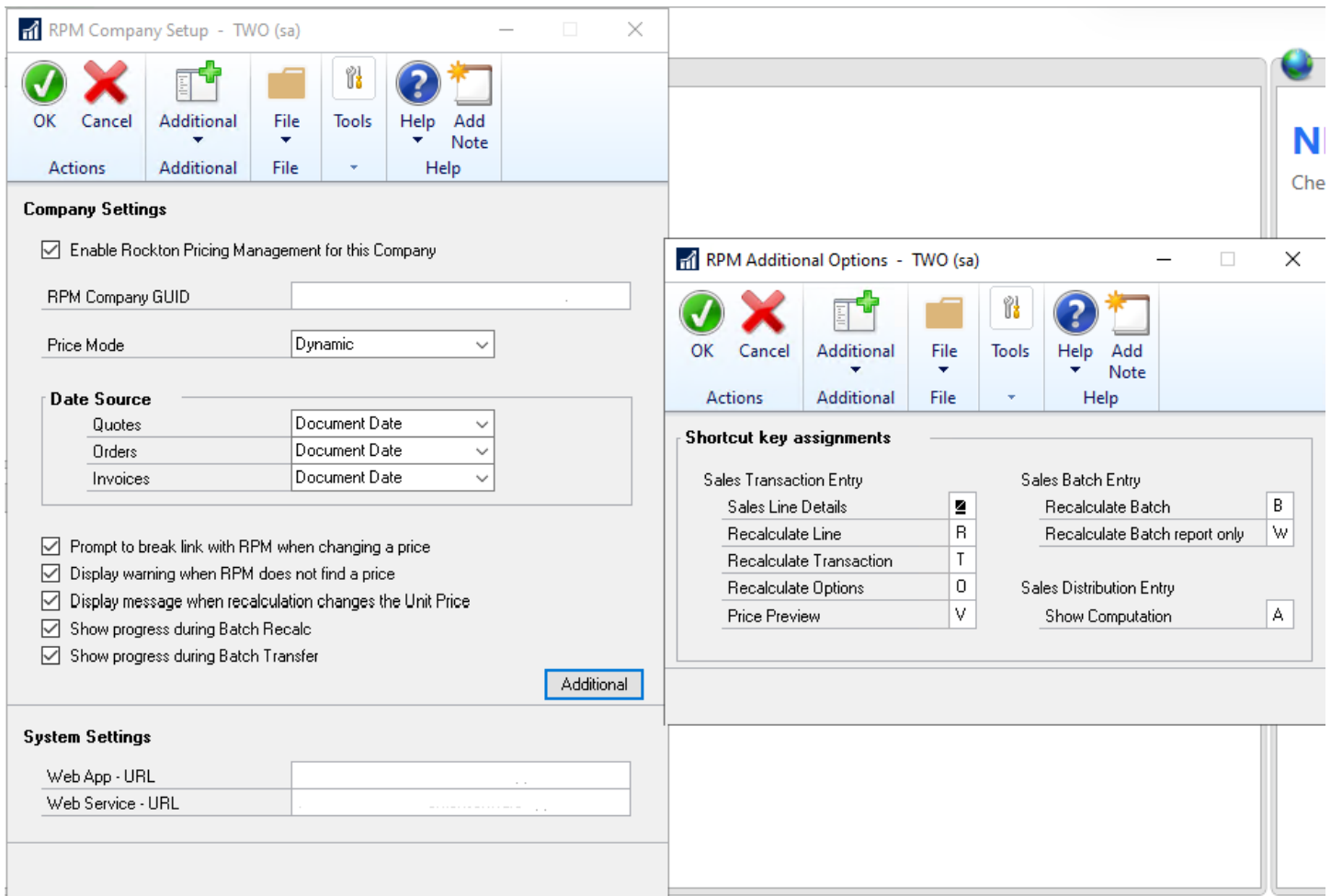


6.7. RPM Company Setup

Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management | Company Setup

Description

This window is used to enable Rockton Pricing Management (RPM) and configure company-wide settings for the company in which you are currently logged in. To access this window, you must be a User in the RPM ADMIN Security Role or the POWERUSER Security Role.



Enable Rockton Pricing Management for this Company

Enabling this check box will activate all RPM features for the current company. If left unchecked, GP standard pricing will be used.

RPM Company GUID

Enter the company GUID of the RPM company. This is found under the Current Company ID field in RPM under Settings.

Price Mode

Select the pricing mode that RPM should use when calculating a price:

- Dynamic – Always let RPM automatically determine the best Schedule to use on the Sales Transaction Line.
- Static – Always use the Schedule that is specified on the Sales Transaction Line.
- Hybrid – Provides you the flexibility to decide whether RPM determines the best Schedule or allows you to specify the Schedule. With this option selected, you can either allow the Schedule to default or specify the Schedule if the field is left blank.

Data Source

Select which Sales Order Processing date to use for RPM filters that require specific dates in the RPM web application. You may select one of the following for Quotes, Orders and Invoices:

- Document Date
- Requested Ship Date

- Quote Expiration Date
- Order Date

Prompt to break link with RPM when changing a price

When a user modifies the unit price or extended price on a sales transaction, this severs the link to the price calculated by the RPM web application. Mark this option to prompt the user for confirmation before proceeding with the change.

Display warning when RPM does not find a price

Enable this option to receive a warning when RPM is unable to determine a price during the price calculation process. This can occur when there are no pricing rules configured in RPM. If no price is found in RPM, GP standard pricing will be applied.

Display message when recalculation changes the Unit Price

Mark this option if you want to receive a message when the Unit Price is changed as a result of the recalculation process.

Show progress during Batch Recalc

Mark this option to see a progress bar while a batch recalculation is in progress.

Show progress during Batch Transfer

Mark this option to see a progress bar while a batch is being transferred.

Shortcut key assignments

You have the flexibility to customize the default shortcut keys assigned to any of these actions. These shortcuts are activated by pressing Ctrl and the assigned key.

- Sales Line Details – Open the Sales Line Details window from the following windows:
 - Sales Transaction Entry
 - Sales Item Detail Entry
 - Sales Transaction Inquiry Zoom
- Recalculate Line – Call RPM to determine the current price for the current line from the following windows:
 - Sales Transaction Entry
 - Sales Item Detail Entry
- Recalculate Transaction – Call RPM to determine the current price for all lines of the current transaction from the Sales Transaction Entry window.
- Recalculate Option - Brings the option to calculate by Line or Transaction when in the Sales Transaction Entry window.
- Price Preview - Brings the Price Preview window up when in the Sales Transaction Entry window.
- Recalculate Batch – Call RPM to determine the current price for each transaction in the

current batch from the Sales Batch Entry window. This can result in actual changes to unit prices.

- Recalculate Batch report only - This calls RPM to determine the current price for each transaction in the current batch form the Sales Batch Entry window. This is a report only of the changes. No unit prices will change with this option.
- Show Computation – Open the Rockton Pricing Management - Adjustment Details window from the Sales Distribution Entry window.

Note: You may also perform any of these actions from the Additional menu on their respective windows.

Web App - URL:

Enter the URL of your RPM Web App Service.

Web Service - URL

Enter the URL of your RPM Web Service.

7. Transaction Information

7.1. Sales Transaction Entry

Transactions | Sales | Sales Transaction Entry

Description

Rockton Pricing Management (RPM) is seamlessly integrated into the Dynamics GP Sales Transaction Entry window, ensuring a smooth and streamlined experience. As transactions are entered, the GP Connector communicates with the RPM web application to return the calculated price.

Sales Transaction Entry - TWO (sa)

Save

Actions

AA

Options

View

Additional

Go To

File

Print

E-mail

Tools

Help

Add Note

ActionsOptionsViewAdditionalGo ToFileFileE-mailToolsHelpHelp

Type/Type ID:InvoiceSTDINVDate4/12/2027

Document No.STDINV2358Batch ID

Customer IDAARONFIT0001Default Site IDWAREHOUSE

Customer NameAaron Fitz ElectricalCustomer PO Number

Ship To AddressWAREHOUSE11403 45 St. SouthCurrency IDZ-US\$

Line Items by Order Entered

Item Number	D	U of M	Invoice Quantity	Unit Price	Extended Price
128 SDRAM	<input type="checkbox"/>	Each	1	\$228.68	\$228.68
100XLG	<input type="checkbox"/>	Each	1	\$101.74	\$101.74
	<input type="checkbox"/>		0	\$0.00	\$0.00

Amount Received\$0.00

Terms Discount Taken\$0.00

On Account\$344.42

Comment ID

Subtotal\$330.42

Trade Discount\$0.00

Freight\$0.00

Miscellaneous\$0.00

Tax\$14.00

Total\$344.42

by Document No.

Document Status

When you enter a transaction and pricing criteria have been defined, RPM retrieves the specified price and populates it into the Unit Price field. If RPM cannot find a price for the given criteria, it uses the Unit Price and Price Level configured within Dynamics GP. In the event that RPM resorts to using the Dynamics GP price, a warning dialog opens:

RPM Pricing Warning - TWO (sa)

OK

Redisplay

Additional

File

Tools

Help

Actions

Additional

File

Help

Document Number / Type	STDINV2358	Return
Customer Number / Name	AARONFIT0001	Aaron Fitz Electrical

Item Number	U of M	Quantity
100XLG	Each	1

Message
 Recalculation has changed Unit Price from 200.00 to 101.74

Note: If you do not wish to receive this message, you can disable it from the RPM Company Setup window. Simply, unmark the "Display warning when RPM does not find a price" option.

The Price Level returned on the transaction line defaults from the Customer directly. To access this field, click the "Show Details" button which displays the details of the line.

Sales Transaction Entry - TWO (sa)

Save Actions Options View Additional Go To File Print E-mail Tools Help Add Note

Type/Type ID: Invoice STDINV Date: 4/12/2027

Document No. STDINV2358 Batch ID

Customer ID AARONFIT0001 Default Site ID WAREHOUSE

Customer Name Aaron Fitz Electrical Customer PO Number

Ship To Address WAREHOUSE 11403 45 St. South Currency ID Z-US\$

Line Items by Order Entered

Item Number	D	U of M	Invoice Quantity	Unit Price	Extended Price
128 SDRAM	<input type="checkbox"/>	Each	1	\$228.68	\$228.68

Description: 128 mg SDRAM

Unit Cost: \$152.10

Req Ship Date: 4/12/2027

Date Shipped: 4/12/2027

Billed Quantity: 1

Qty Fulfilled: 1

Qty Canceled: 0

Qty to Back Order: 0

Site ID: WAREHOUSE

Price Level: MASTER

Ship To Address ID: WAREHOUSE

Shipping Method: LOCAL DELIVERY

Quantity Available: (83)

Amount Received: \$0.00

Terms Discount Taken: \$0.00

On Account: \$337.55

Subtotal: \$330.42

Trade Discount: \$0.00

Freight: \$0.00

Miscellaneous: \$0.00

Tax: \$7.13

Total: \$337.55

by Document No. Document Status

In addition to the Unit Price, the Schedule ID used by RPM in the price calculation is returned to the Schedule ID field on the RPM - Sales Line Details page. To view, place your cursor on the transaction line, select Additional and then select RPM - Sales Line Details.

Rockton Pricing Management - Sales Line Details - TWO (sa)

OK Redisplay Additional File Tools Help Add Note

Document Type Invoice Item Number 128 SDRAM

Document Number STDINV2358 Item Description 128 mg SDRAM

Schedule ID MASTER

Computation Type	Debit Account Number	Credit Account Number	Affects Unit Price?	Computation Amount	Comment
\$25 SC	000-1100-00	000-1101-00	Yes	\$25.00	205.99 >> [25] >> 25 >> 230.99
No change			No	\$230.99	230.99 >> [0] >> 0 >> 230.99
1% Discount	000-2210-00	000-1101-00	Yes	(\$2.30)	230.99 >> [-1] >> -2.3099 >> 228.6801

Unit Price: \$228.68

☒ Price Was Found [Price Diagnostics](#)

If you are using the Static Price Mode (see the section on the [RPM Company Setup](#) window for more information on Price Mode), the Price Level will automatically default based on the Dynamics GP setup.



In order to use RPM and the GP Connector, it is essential that all set ups pertaining to Sales and Inventory are complete in Dynamics GP. For example, the Schedule IDs in RPM correspond to the Price Levels in Dynamics GP. Therefore, you must ensure that any Schedule IDs used in RPM are set up in Dynamics GP as Price Levels and are assigned to Customers or Items as appropriate.

7.2. Price Computations

Transactions | Sales | Sales Transaction Entry - Additional | RPM - Sales Line Details

Description

You can to configure Rockton Pricing Management (RPM) to return additional Price Adjustments along with the Unit Price for your Items. These adjustments are defined within the RPM web application as Calculations. For more information on Calculations, view the Help in the RPM web application.

To access the Price Computations for a specific line item, place your cursor anywhere within the desired line and then click **Additional | RPM - Sales Line Details**. You may also use the shortcut key, which by default is **Ctrl+Z**, to open the RPM - Sales Line Details window:

Computation Type	Debit Account Number	Credit Account Number	Affects Unit Price?	Computation Amount	Comment
\$25 SC	000-1100-00	000-1101-00	Yes	\$25.00	205.99 >> [25] >> 25 >> 230.99
No change			No	\$230.99	230.99 >> [0] >> 0 >> 230.99
1% Discount	000-2210-00	000-1101-00	Yes	(\$2.30)	230.99 >> [-1] >> -2.3099 >> 228.6801

Unit Price: \$228.68

☒ Price Was Found [Price Diagnostics](#)

The Rockton Pricing Management – Sales Line Details window displays a list of each Adjustment returned from RPM for the selected line item. The fields located at the window's top section are sourced from the initially selected Sales line item. The columns within the list are determined by the RPM web application configuration and are as follows:

Computation Type

This is defined within the RPM web application and cannot be modified from this window.

Debit and Credit Account Numbers

For every Adjustment two distributions is generated for the sales document: one Debit and one Credit. When the Adjustment Amount field is a positive value, the following distributions will be created:

Account Number	Debit Amount	Credit Amount
Debit Account Number	If Adjustment Amount is positive → Adjustment Amount If Adjustment amount is negative → 0.00	If Adjustment Amount is positive → 0.00 If Adjustment Amount is negative → -1 * Adjustment Amount
Credit Account Number	If Adjustment Amount is positive → 0.00 If Adjustment amount is negative → -1 * Adjustment Amount	If Adjustment Amount is positive → Adjustment Amount If Adjustment amount is negative → 0.00

See the [Sales Distribution Entry](#) window section for more information about viewing the Distributions for a sales document.

Affects Unit Price?

If "Yes", then the Adjustment Amount is applied to the Unit Price that is returned to the sales transaction.

Computation Amount

The Computation Amount is the value of the adjustment applied to the Unit Price. When RPM returns a price, it includes the Computation Amount, so these amounts are already considered into the returned price. If the user modifies a Computation Amount later, the Unit Price is adjusted by the difference between the original amount calculated by RPM and the new value entered by the user for that adjustment.

Example 1

Let's say RPM initially calculated a Unit Price of \$100.00 with an adjustment of \$5.50. If "Is Editable?" and "Affects Unit Price?" are both set to "Yes", and the user changes the Computation Amount from \$5.50 to \$10, the Unit Price is adjusted by the difference, which is \$4.50. The new Unit Price is now \$104.50. If the user later changes it from \$10 to \$12, the Unit Price is adjusted by and additional \$2, resulting in a Unit Price of \$106.50. This is because \$12 is \$6.50 more than the original amount calculated for this adjustment (\$5.50).

Example 2

Using the same initial Unit Price of \$100.00 with the same adjustment as in the previous example, but with "Affects Unit Price?" set to "No". In this case, it does not matter how much or how many times the user changes the Adjustment Amount; the Unit Price will always remain at \$100.

Comment

The Comment field in the Computations grid will display an overview of how each computation line was calculated, making pricing results easier to understand and troubleshoot.

Price Was Found

When marked, this field indicates that RPM successfully calculated a price for this item. If RPM did not calculate a price, this check box remains unmarked.

Price Diagnostics

Clicking this hyper-link opens the Price Diagnostics window, which displays all the decisions made by the RPM web application during the calculation of this price. This window is typically used to help understand the price calculation process or when troubleshooting potential pricing issues.

Thu Jan 29 2026 19:06:29 GMT...

Run ID
245

Calculation Time
110

Output Price
228.6801

Result Data

Input Document Output Document Input Line Output Line

Result Data

Beginning of Diagnostics

Input JSON:

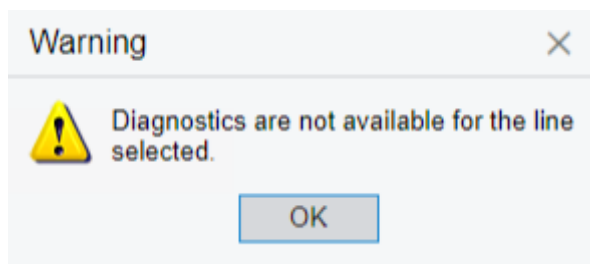
```
{
  "Document": {
    "DocumentNumber": "STDINV2358-3",
    "LineCount": 1,
    "Lines": [
      {
        "LineNumber": "16384-0",
        "ScheduleERPID": "",
        "CustomerNumber": "AARONFIT0001",
        "ItemNumber": "128 SDRAM",
        "LocationCode": "WAREHOUSE",
        "UofMName": "Each",

```

Toggle Monospace

Generate Tests

By default, the diagnostic information is stored for 7 days, at which point it is purged in RPM. If the data has been purged for the record and you click View Diagnostics, you will receive the following message:



For more information on purging diagnostics, review the RPM Help files.

Manual Edit of Unit Price

You can override the price calculated by RPM by manually entering a new Unit Price or Extended Price on the transaction line. When you do this, it severs the connection to RPM for that sales transaction line, and you won't be able to access the Rockton Pricing Management – Sales Line Details window for that line anymore.

If you want to re-establish the link to RPM, you must perform an action that triggers the recalculation of the Unit Price by RPM. For further details, refer to the section on [Recalculating a Price](#).

7.3. Recalculating a Price

Description

You may want to recalculate the price for a Sales transaction. Some examples are:

1. You've manually changed the price on a transaction.
2. Your Schedule configurations have changed, and you want to apply the current price.
3. The line was entered previously, and you want to verify the price is still valid.

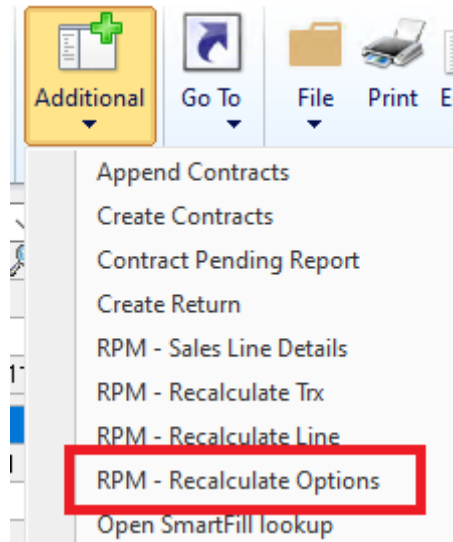
Recalculate Option

If you would first like to see what the recalculation would do, you can use the RPM Recalculate Option to go through a preview of the calculation. Using this option will return the recalculated amounts in a window without actually changing the price. This will allow you to see what the recalculated price will be before you changing it.

To access this feature:

- 1 Open the **Sales Transaction Entry** window.
- 2 Click the **Additional** menu.
- 3 Select **RPM Recalculate Option**.

For the Recalculate option, choose Current Line or Whole Transaction depending on whether you want to see the recalculation amount for the line you are on or all lines on the transaction.



If you only want to see the potential change, then mark the 'Show changes, but do not change prices.' checkbox. You can unmark this option if you want to move forward with changing the price on the transaction after the recalculation and see the pop-up window displaying the price changes for the transaction.

RPM Recalculate Options

Recalculate: Current Line ▼

☒ Show changes, but do not change prices

Process Cancel

When you click Process, the RPM Pricing Warning window will open and display the Items that were recalculated and the new prices.

RPM Pricing Warning - TWO (sa)

OK
 Redisplay
 Additional
 File
 Tools
 Help

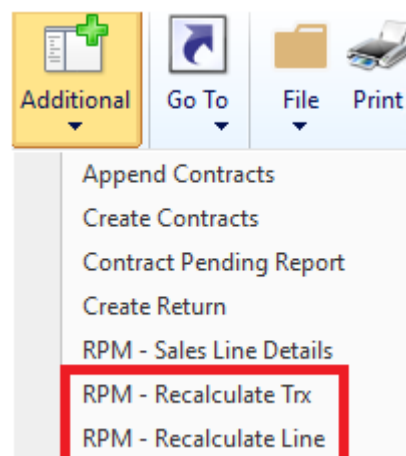
Document Number / Type: STDINV2358 Return
 Customer Number / Name: AARONFIT0001 Aaron Fitz Electrical

Item Number	U of M	Quantity
100XLG	Each	1

Message
Recalculation has changed Unit Price from 200.00 to 101.74

Recalculate Methods

There are three ways RPM can recalculate; a single line on a sales transaction, all lines on a transaction, or all transactions in a batch.



Recalculating a single line

(Transactions | Sales | Sales Transaction Entry - Additional | RPM - Recalculate Trx)

To recalculate a single line, access the Sales Transaction Entry window or the Sales Item Detail Entry window. From the Additional menu, click "RPM – Recalculate Line" (or use the shortcut key,

which is CTRL+R by default). Make sure to place your cursor on the line you want to recalculate. You are prompted to confirm the request:

RPM: About to recalculate the pricing for this line. Continue?

Click "Yes" to proceed with the recalculation or "No" to cancel.

Alternatively, a recalculation can be initiated when modifying a field on the line or on the transaction header, which RPM uses to determine the price for this line. This action triggers the price to recalculate using the current RPM pricing setup, even if the link to a previous Schedule had been broken for this line item. In this case, there won't be a confirmation first, the price recalculates automatically.

Once the recalculation is complete and the unit price has been adjusted, a warning notification will inform you of the price change. If you do not want to receive this warning message after a recalculation, you can unmark the "Display message when recalculation changes the Unit Price" check box in RPM Company Setup.

Recalculating an Entire Transaction

(Transactions | Sales | Sales Transaction Entry - Additional | RPM - Recalculate Line)

You can recalculate the entire transaction using either the Sales Transaction Entry window or the Sales Item Detail Entry window. Open the Additional menu (or use the shortcut key, which is CTRL+T by default), and a confirmation prompt will appear:

RPM: About to recalculate the pricing for this document. Continue?

Click "Yes" to proceed with the recalculation or "No" to cancel.

Once the recalculation is complete and the unit price has adjusted, a warning notification will inform you of the price change. If you do not want to receive this warning message after a recalculation, you can unmark the "Display message when recalculation changes the Unit Price" check box in RPM Company Setup.

Recalculating an Entire Batch

(Transactions | Sales | Sales Batches - Additional | RPM - Recalculate Batch)

You have the option to recalculate the batch or print the Recalc Batch report. By clicking the RPM - Recalc Batch report only option, a report will print displaying the recalculation details for the batch selected in the window. This is a helpful option if you want to verify new pricing before updating the transactions.

To recalculate an entire batch, open the Sales Batch Entry window and from the Additional menu (or use the shortcut key, which is CTRL+B by default), click RPM - Recalculate Batch. You will then receive a prompt to confirm:

RPM: About to recalculate the pricing for this batch. Continue?

Click "Yes" to proceed with the recalculation or "No" to cancel. If you choose "Yes", a progress bar will appear, indicating the number of records to be recalculated and how many have already been recalculated.

When the recalculation is complete, the RPM Batch Recalc Messages report will be generated and displayed, displaying any records where the price has been changed.

7.4. Sales Distribution Entry

Transactions | Sales | Sales Transaction Entry | Go To | Distributions

Description

The Sales Distribution Entry window displays the distributions for the current Sales Document. If you are using Price Computations within RPM and have marked to Track Computations on the Calculation, these adjustment distributions will also be displayed here.

Sales Distribution Entry - TWO (sa)

OK

Delete

Default

View

Additional

File

Tools

Help

Add Note

Debug

Actions

View

Additional

File

Tools

Help

Debug

Customer IDAARONFIT0001

Document No.STDINV2270

NameAaron Fitz Electrical

Document TypeInvoice

Functional Amount\$442.50

Originating Amount\$0.00

Account Distributions

Account

Type

Debit

Credit

Description

Originating Debit

Originating Credit

Distribution Reference

000 -1200 -00	RECV	\$442.50	\$0.00
000 -4100 -00	SALES	\$0.00	\$442.50
300 -5130 -00	COMMEXP	\$13.28	\$0.00
000 -2120 -00	COMMPAY	\$0.00	\$13.28
000 -1205 -00	MISC	\$0.00	\$21.00
000 -4100 -00	MISC	\$21.00	\$0.00
000 -6650 -00	MISC	\$3.00	\$0.00
000 -6730 -00	MISC	\$0.00	\$3.00
000 -4100 -00	MISC	\$5.76	\$0.00
000 -4520 -01	MISC	\$0.00	\$5.76
000 -1205 -00	MISC	\$0.00	\$27.50
000 -4100 -00	MISC	\$27.50	\$0.00
000 -6650 -00	MISC	\$3.00	\$0.00
000 -6730 -00	MISC	\$0.00	\$3.00
000 -4100 -00	MISC	\$7.51	\$0.00
Functional Totals		\$523.55	\$523.55
Originating Totals		\$0.00	\$0.00

RPM creates two distributions (one debit and one credit) for each Computation record that is associated with a sales line item price that was calculated by RPM. These distributions have a Type of "MISC" and may not be edited or deleted by users as they are controlled by RPM.

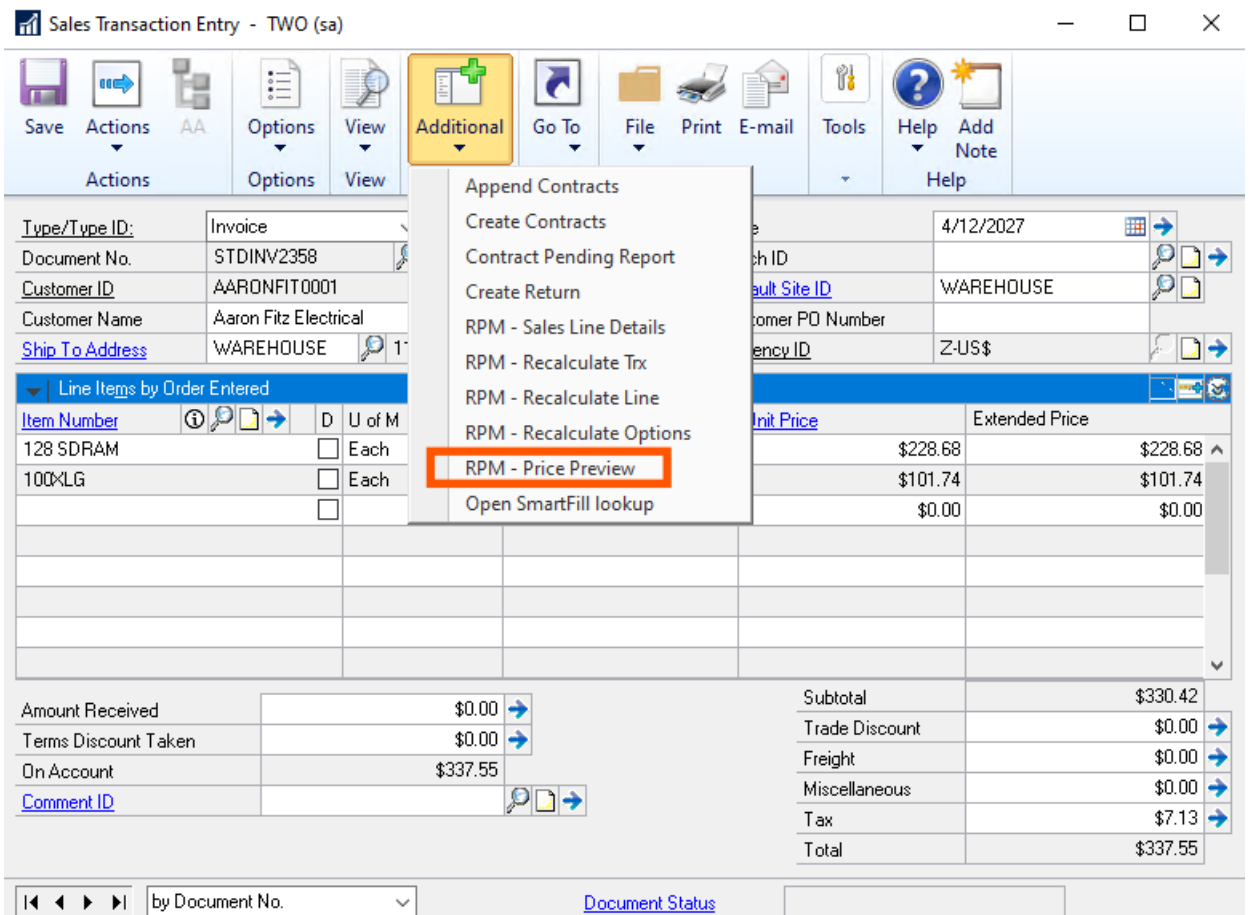
You can modify the values by making changes to the Computations (see the section on [Price Computations](#) for more information).

7.5. Price Preview

Transactions | Sales | Sales Transaction Entry | Additional | RPM - Price Preview

The RPM GP Connector includes Price Preview, which allows users to view a clear, side-by-side comparison of pricing results across applicable RPM Schedules directly within Dynamics GP. This feature mirrors the analysis available in RPM Test Scenarios, making it easier to validate pricing logic, review pricing adjustments, and troubleshoot pricing behavior.

After a sales line has been entered, Price Preview can be accessed from the Additional button on the Sales Transaction Entry window.



The Price Preview window provides visibility into all pricing calculations for each Schedule.

8. Additional Tools and Functionality

8.1. Data Sync

Data Sync Overview

Rockton Pricing Management (RPM) integrates seamlessly with Dynamics GP to ensure consistent and accurate data synchronization between the two systems. This synchronization is essential to reflect any changes made to customer data in Dynamics GP accurately within RPM. An updated synchronization method using Sync Queues in RPM facilitates this process.

Upon installing the RPM Connector for Dynamics GP, several views are created within SQL to support this integration:

In the DYNAMICS database:

- RPMViewCurrency

In the Company database:

- RPMViewCustomer
- RPMViewGLAccount
- RPMViewItem
- RPMViewItemCurrency
- RPMViewLocationCode
- RPMViewPriceLevel
- RPMViewPriceSheet
- RPMViewUofM
- RPMViewUofMSchedule

Additionally, RPM Triggers are established on various SQL tables in Dynamics GP. These triggers work alongside the views in the local sync queue to notify the RPM web service of any new or changed records - be it a new Customer or Item, or changes to existing records like a GL Account. When a record is created or edited in any of these specified RPM SQL Views, it initiates a local sync queue record. Single records sync automatically. However, to sync all data for an entity or to apply specific sync filters, using System Jobs in RPM is essential. Once configured, RPM will then automatically update the records based on this synchronized data.

Because most of the synchronization setup and processing occurs within the RPM Core, there is limited visibility and interaction options available directly within Dynamics GP itself. For more detailed exploration of the RPM Data Sync function, please refer to the Rockton Pricing Management manual.

Review the Data Sync Overview section for some additional technical detail regarding the Data Sync between RPM and Dynamics GP.

8.1.1. Data Sync Overview

Overview of Data Sync from GP to RPM for Data Sync

The RPM GP Connector facilitates seamless data synchronization from Dynamics GP to RPM, leveraging the OData service for robust and secure data transfer. The process is designed to ensure that all data from Dynamics GP is accurately reflected in RPM through a series of well-defined steps:

Prerequisites Setup:

1. OData Service Installation and Configuration:
 - Install and configure the Dynamics GP OData Service using the GP install image, ensuring the server is domain-connected with Active Directory and a valid certificate.
 - Set up a service account with appropriate Active Directory credentials to run the OData service.
 - Verify the OData service by accessing the published URL, which should return data.
2. SQL Server Configuration:
 - Execute the Enable Ole Automation.sql script on your SQL server to prepare the database for synchronization.
3. Dynamics GP Preparation:
 - Utilize a dedicated GP user linked to the AD user with the necessary permissions to access Security and OData settings within GP.

Configuring Data Sync:

1. GP OData Service Deployment:
 - Run the setup from the Dynamics GP DVD to create an endpoint for OData, allowing authenticated data access.
2. Dynamics GP Setup:
 - Log into Dynamics GP with sufficient privileges to modify OData and security settings.
 - Link GP login to the Windows AD account and configure roles and permissions to include all necessary "OD" roles.
 - Navigate through Dynamics GP to set up the OData service, specifying the service

URL and configuring data sources to include RPM-specific views.

3. OData Connection Testing:

- Test the OData connection in Dynamics GP and via external tools like Excel and potentially Power BI to ensure the integrity and availability of the data.
- Confirm the operational status of the OData feeds by accessing them in a browser or through client applications, ensuring all configured views return expected data.

Ongoing Management and Testing:

- Regularly update and test the OData connections and the data sync functionalities to ensure consistent and reliable data transfer between Dynamics GP and RPM.
- Use client tools like Excel or Power BI to verify the data integrity and troubleshoot any issues in the data synchronization process.

This structured approach not only ensures data consistency across platforms but also provides a reliable and scalable solution for integrating Dynamics GP with RPM, making business processes more efficient and data-driven.

8.1.2. Document Attribute Process with Data Sync

Document Attribute Process with Data Sync

In some cases, you may find that key pricing decisions rely on data points that RPM doesn't currently track. This section explains how you can add these data fields as document attributes to the Data Sync process, enabling RPM to recognize and utilize this new information for your pricing models. Syncing these document attributes enhances the system's flexibility in how pricing is calculated.

Note: This section requires at least a basic familiarity with SQL Server, the Transact SQL language, and SQL Server Management Studio.

Adding a New Attribute for Data Sync

To integrate a new attribute into the Data Sync process, follow these key steps:

- Identify the appropriate view for the new attribute.
- Update the view to include the new attribute in the database.
- Modify the Sync trigger to capture changes related to the new attribute.
- Adjust the Sync Reader and Sync Writer within RPM to handle the new data efficiently.

Part 1: Identify the appropriate View for the new Attribute

There are several SQL views that are used by the Data Sync process in the RPM Connector for Dynamics GP. The following lists these views and the tables that are used by them:

View	Table Name	Contains Create and Modified Date?
RPMViewCurrency	MC40200	No
RPMViewCustomer	RM00101	Yes
RPMViewGLAccount	GL00100 GL00105	Yes No
RPMViewItem	IV00101 IV40400	Yes No
RPMViewItemCurrency	IV00101 IV00105 IV00108 IV40202	No No No No
RPMViewLocationCode	IV40700	No
RPMViewPriceLevel	IV40800	Yes
RPMViewPriceSheet		
RPMViewUofM	IV40201 IV40202	No No
RPMViewUofMSchedule	IV40201	No

The first thing you will need to do is to determine which of the above views is the best fit for the new attribute.

Note: For Dynamics GP, you may only add an attribute that exists as a column in one of the tables listed above.

Part 2: Update the View

You will need to edit the view in SSMS and add your new column to the column list of the SELECT statement for that view.

For instance, let's say you want RPM to be able to use the Credit Limit Amount on the Customer Master table (RM00101). That falls under scenario 1, so you would edit the RPMCustomerView

and add the CRLMTAMT column, as follows (see highlighted text):

```
ALTER VIEW [dbo].[RPMViewCustomer]
AS
SELECT CUSTNMBR, CUSTNAME, CUSTCLAS, SLPRSNID, SALSTERR, PRCLEVEL, CURNCYID, SHIPMTHD,
CITY, STATE, ZIP, COUNTRY, PYMTRMID, UPSZONE, USERDEF1, USERDEF2, CREATDDT, MODIFDT,
CRLMTAMT
FROM    dbo.RM00101
```

Part 3: Modify the Sync Trigger

Each table that will be synchronized to RPM will have two triggers associated with it: an INSERT trigger and an UPDATE trigger. Using the same example as in the previous section, you will edit the UPDATE trigger in SSMS and change it as follows (changes are highlighted):

3. Find the section where it checks which columns have changed. It begins as follows:

```
IF UPDATE(CUSTNAME) OR UPDATE(CUSTCLAS) OR UPDATE(SLPRSNID) OR ...
```

2. Simply insert your column anywhere in this list:

```
IF UPDATE(CUSTNAME) OR UPDATE(CUSTCLAS) OR UPDATE(CRLMTAMT) OR UPDATE(SLPRSNID) OR
```

Part 4: Adjust the Sync Reader and Sync Writer within RPM

See the RPM Help documentation for information to make the necessary changes to the Sync Readers and Sync Writers directly within RPM.

8.2. Table Archive/Purge

Microsoft Dynamics GP | Tools | Setup | Rockton Pricing Management | Rockton Pricing Management Setup

Description

When you use the RPM - Recalculate Batch process to recalculate a batch, the information is stored in a table until you choose to remove the data. The Rockton Pricing Management Table Archive/Purge window is used for archiving and purging these Batch Recalc messages. This window is accessible to users with the RPM Admin. security role.

Rockton Pricing Management Table Archive/Purge - TWO (sa)

OK
 Archive to XML
 Purge
 Import Archive
 Redisplay
 Additional
 File
 Tools
 Help
 Add Note

Rockton Pricing Management Table Archive/Purge

We recommend backing up your system and company databases (if applicable).
You may also want to have all users exit Microsoft Dynamics GP.

Table to archive/purge: Batch Recalc Messages

Criteria:

Total record count for selected table: 323
Records to be archived/purged based on above criteria: 323

Preview

CMPANYID	RPM_Recalc_Date	RPM_Recalc_Time	SEQNUMBR	SOPNUMBE	SOPTYPE	LNITMSEQ
-1	2023-10-06 00:00:00.000	1900-01-01 16:28:33.000	1	INVS3017	3	16384
-1	2023-10-06 00:00:00.000	1900-01-01 16:28:33.000	2	INVS3017	3	32768
-1	2023-10-06 00:00:00.000	1900-01-01 16:28:33.000	3	INVS3017	3	49152
-1	2023-10-06 00:00:00.000	1900-01-01 16:28:33.000	4	INVS3017	3	65536
-1	2023-10-06 00:00:00.000	1900-01-01 16:28:33.000	5	INVS3017	3	81920
-1	2023-10-06 00:00:00.000	1900-01-01 16:28:33.000	6	INVS3018	3	16384
-1	2023-10-06 00:00:00.000	1900-01-01 16:28:33.000	7	INVS3018	3	49152

Table to archive/Purge

Contains a list of available tables that may be archived or purged. Currently, only Batch Recalc Messages appear in the drop-down.

Criteria

Allows you to define a query for the selection of records to archive and purge to XML. Click the "Edit Criteria" button () to open the Query Builder window where you can define a query to apply to the records. For more information see the [Query Builder](#) section on building a query.

After you have defined your Criteria, the number of records that match the query will be displayed in the "Records to be archived/purged based on above criteria" field. The total number of records in the table is also shown. These records are listed in the Preview list at the bottom of the Auditor Table Archive/Purge window. You have several actions available for managing this group of records.

- **Archive to XML**

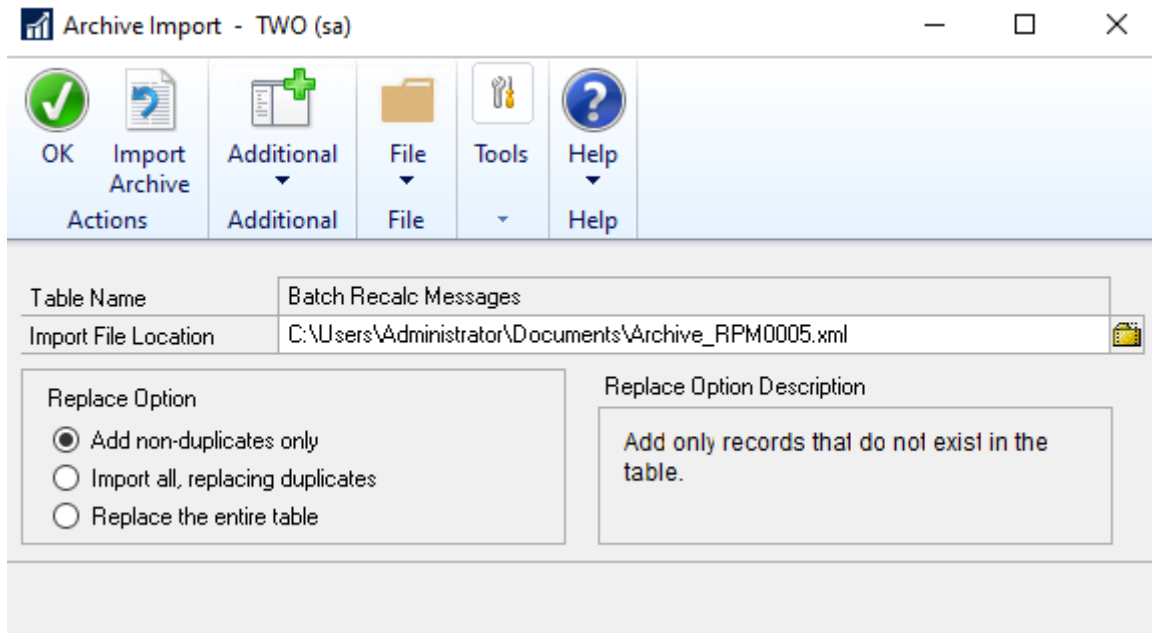
Creates XML files that have text information of these records, which can be viewed in most browsers or in an XML editor.

- **Purge**

This deletes the selected records from the table. You can recover these records by importing a previously created XML archive or by restoring from a backup.

- **Import Archive**

Opens the Archive Import window where you can reintegrate the contents of a previously created XML archive file back into the original master tables.



You can select a path and provide a filename of the XML archive file you want to import. To ensure a successful import, this file must have been created using the "Archive to XML" function from the Rockton Pricing Management Archive/Purge window.

Mark the "Replace Option" to indicate how duplicates should be handled. An item in the archive file is considered as a duplicate if the values for all the primary keys field in the table match a record in the table itself.

The options available are:

Add non-duplicates only - Only items in the archive file that do not match records in the table will be imported, while any duplicates will be ignored.

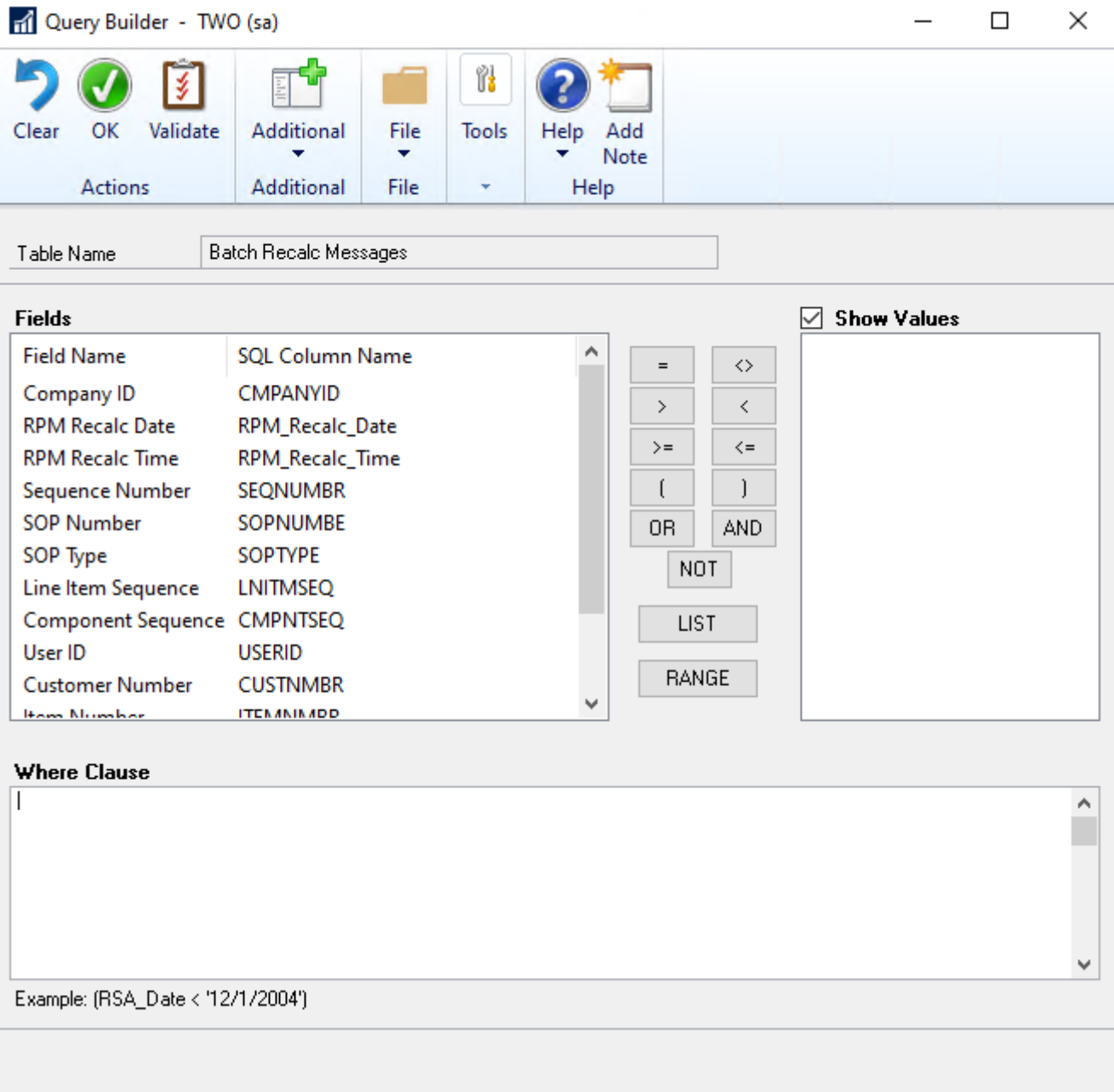
Import all, replacing duplicates - All items in the archive file will be imported; if any duplicates are detected, the corresponding record in the table will be replaced with the values from the archive file.

Replace the entire table - All records are removed from the table, then proceed to import all records from the archive file.

After you have made your selection, click the "Import Archive" button. When prompted to confirm, click "Continue" or "Cancel".

8.3. Query Builder

This window builds a query to filter and identify the records that you want to purge or archive.



Steps to build a query:

1. Double-click a field from the Fields list box on the left. This action inserts the SQL name of that field into the Where Clause box at the bottom, which is where you construct your query.
2. Click one of the operator buttons positioned between the Fields and Values list boxes.
3. Double-click a value from the Values list box to add it into the query, or simply input the desired value into the query.
4. Click **Validate** to verify the syntax is correct.

The List and Range buttons will prompt you with instructions for using those operators.

You may use the method above or manually type a SQL where clause manually.

9. Appendix
