# 2020 Worksheet User Guide



# **Table of Contents**

ABOUT 2020 WORKSHEET	1
GETTING STARTED	2
HINTS AND PROCEDURES	3
ASSOCIATED-VISUAL AND VISUAL-ONLY WORKSHEETS	3
USING HELP	6
Topics	7
What's new	7
User Guide	9
Release Notes	9
View the 2020 Technologies website	9
Diagnostics	10
Check for software updates	11
Check for catalog updates	11
About 2020 Worksheet	11
SCREEN COMPONENTS	12
Caption bar	13
Menu bar	13
Toolbars	14
Show or hide a toolbar	15
Move a toolbar	15
Add and remove buttons	16
To reset a modified built-in toolbar:	18
Custom toolbars	18
Delete a custom toolbar	20
Standard	21
View	23

Item	25
Worksheet	28
Report	30
Visualize	31
Explorer pane	31
Move the Explorer pane	32
Auto-hide feature (Explorer pane)	34
Show or hide Explorer pane tabs	35
Content tab	36
Projects tab	38
Search tab	39
Bookmarks tab	40
Preview pane	41
Worksheet area	42
Worksheet tabs	42
Worksheet tab	43
Show or hide rows	44
Resize columns	44
Display or hide a column	45
Customize columns	47
Description of worksheet columns	48
Catalog Info columns	49
Counts columns	50
Discounts columns	51
International columns	51
Item Management	52
Miscellaneous columns	53
Price Zones columns	55
Pricing columns	55
Tagging columns	56
Totals columns	57
Views columns	58

Preview column	58
Global Options tab	60
Cover Page tab	61
Report tab	62
Task pane	63
Show or hide the Task pane	64
Move the Task pane	64
Auto-hide feature (Task pane)	67
Worksheets view	68
Item Detail view	70
Option Clipboard view	72
Status bar	73
Context menus	74
CREATE A WORKSHEET	75
New blank worksheet	75
New worksheet using the Wizard	76
OPEN, SAVE AND CLOSE A WORKSHEET	77
Open a worksheet	77
Save a worksheet	77
Close a worksheet	78
IMPORT, EXPORT AND CONVERT DATA	79
Import data	79
Export data	81
Convert data	83
Export several files	83
Convert a Giza Specifier User Library	84
Convert a Design Express project	84
MERGE AND PURGE WORKSHEETS	85
Merge worksheets	86
Purge a worksheet	86

PRINT AND E-MAIL A WORKSHEET	87
E-mail a worksheet	87
Print a worksheet	87
Preview before printing	88
Example - Print panels only	88
Page Setup	90
Set the default printer	90
Print multiple levels	91
Header / Footer	91
Header tab	93
Footer tab	94
Example: customize the header	95
WORKSHEET PROPERTIES	98
General	99
Order	100
Columns	102
Header/Footer	102
Adjustments	103
International	103
WORKSHEET TEMPLATES	104
Create a new template	104
Create a template from current worksheet settings	105
Select a default worksheet template	106
Apply a template to a worksheet	107
PROJECTS	108
Create a project folder	108
Manage projects	109
Project templates	110
Apply a project template to a worksheet	111
Open a worksheet or drawing from the Projects tab	113

Copy products from other worksheets	113
PREFERENCES	115
General preferences	116
Display preferences	118
Common preferences	120
Explorer preferences	122
QuickSearch preferences	124
Specification preferences	127
Visualization preferences	129
Content preferences	130
Folders and files preferences	134
User preferences	137
MANUFACTURER CATALOGS	140
Navigate catalogs	140
Catalog Properties	142
Use multiple versions of the same catalog	144
BOOKMARKS	147
Organize bookmarks	148
ENTER AND EDIT ITEMS IN A WORKSHEET	150
Add products using drag and drop	151
Add products using Insert	153
Add products from an archived catalog	154
Add service parts	155
From the Content tab:	155
From the Worksheet area:	159
Select or make an item current	160
Current item	161
To make an item current:	161
To clear the current item:	162
Select items	163

Special selection tools	164
Select flagged, locked, complete or incomplete items	164
Select by Criteria	165
Edit commands	166
Cut, copy and paste an item	166
Delete an item	167
Move an item	168
Undo an action	168
Redo an action	169
Go to a specific line and column	170
Go to an item's location in Explorer	170
Add or edit an annotation for an item	170
Sort records by column	171
Sort by multiple columns	172
Attributes	174
Search for an attribute line	176
Custom items (Specials)	177
Change an existing part into a custom item	177
Add an item that is not found in a catalog	179
Insert blank options and attributes	180
Item properties	180
Copy values from one column to another	181
Quickly fill in cell values (Assign)	182
Copy options and attributes (Block Assign)	183
Consolidate identical items	185
Split an item	186
Update items	188
Update against a catalog	188
Update against a worksheet	189
Update preview images	190
Flag and lock lines	192
Flag lines	192

Flag by criteria	193
Lock lines	195
Lock by criteria	196
Send an item	198
Send to a worksheet	198
Send to a drawing	199
SEARCH FOR TEXT OR PRODUCTS	200
Find text in a worksheet	200
Use Advanced Find to select items	201
Find and replace an item	203
QuickSearch	205
Use QuickSearch from the Content tab	205
Use QuickSearch from the Part Number field	206
Filter QuickSearch	207
Search for products	208
Search by part number	209
Search by part description	211
PREVIEW A PRODUCT	213
Change the preview image type	215
Rotate or move an image	216
Zoom an image	217
Change the ISO view	217
Change the rendering mode	218
Save the image	218
Load an image	219
<u>OPTIONS</u>	220
Specify - access 2020 Options	221
Global Options	222
Screen components	223
Line Item Information	224

Option Groups	224
Available Options	227
Select options using Global Options	229
Verify options if Quick Options is on	232
Filtered items	235
Option Clipboard	237
Option Clipboard sections	238
Copy options to the Option Clipboard	238
Option trail	240
Option Trail Properties	240
Apply an option trail to one item	242
Apply an option trail to several items	243
Apply several option trails to several items	245
Option Sets	246
Save option sets	246
Load and apply option sets	247
Complete column	247
Search for an option line	248
DISCOUNTS AND PRICE ADJUSTMENTS	250
Discounts	250
To apply a discount:	251
Discount schedules	254
Save discount schedules	255
Apply saved discount schedules	256
Modify or remove a discount from a schedule	257
Print a discount schedule	258
Modify discounts	259
View discounts applied to an item	260
Price adjustments	260
Fixed amount	261
Example - create a design fee	264

Percentage amount	265
Example - add a tax	268
Example - price reduction for parts from a specific catalog	270
Advanced adjustment	271
Example - discount for large orders	273
Example - shipping charge based on weight	275
Modify or move adjustments	277
Recalculate the Grand Total	280
SUBTOTALS	280
Insert subtotal through MultiSort	280
Insert subtotal manually	283
Insert subtotal by a selection set	284
Remove subtotals	285
CUSTOM CATALOGS	285
Custom catalogs vs. manufacturer catalogs	286
Add items to a custom catalog	287
Add items into a custom catalog from a worksheet	287
Add items into a custom catalog from the Content tab	288
Add items into a custom catalog from Specify	288
Add items into a custom catalog from Search	289
Add in a custom catalog as a product	289
Add in a custom catalog as a Standard	291
Create a custom catalog	294
Manage custom catalogs	295
Modify an item in a custom catalog	296
Delete an item from a custom catalog	296
Update an item against a manufacturer catalog	296
Add options to an item in a custom catalog	297
Reuse and update items from a custom catalog	298
Reuse an individual part from a custom catalog	298
Reuse a Standard from a custom catalog	300

Reuse an individual part within a Standard from a custom catalog	301
What happens when you update custom catalog items	303
Break custom catalog links	303
Break a link on an individual product	303
Break a Link on a Standard	304
Flatten a Standard	304
Break a Standard Link	304
STANDARDS	307
View the contents of a standard	308
Step out of a Standard	310
Redefine a Standard	311
Save as single level worksheet	313
Print multiple levels	314
Show levels in Explorer	315
OUTLINE LEVELS	315
PANEL CONFIGURATIONS	317
Use the Custom Catalog Wizard to insert a panel	317
Create a panel configuration without the Wizard	318
Modify a panel configuration	320
Specify options for a panel configuration	322
VALIDATE A WORKSHEET	323
VISUALIZE A SCENE OR ALL PRODUCTS IN VISUAL IMPRESSION	324
WORKSHEET LINKS	326
Insert worksheet links	326
Change worksheet links	328
CONTACTS	328
Edit contact information for the current worksheet only	330

File menu	366
COMMAND REFERENCE	366
Report preferences	365
Design preferences	364
Frame Designer preferences	363
Add frame designs to a worksheet	361
Import frame design sets	359
Export frame design sets	358
Print a frame design	357
Modify a frame design	355
Create a frame design	350
Access the Frame Designer	349
FRAME DESIGNER (GIZA ONLY)	348
Print reports	347
Export a report to PDF	346
View report pages	345
Report Designer	344
Create a Panel Builder Report	343
Create, edit and manage reports	341
Generate Quick Reports	341
Apply a standard or user report design	340
View a report	339
REPORTS	339
Print a cover page	338
Zoom the cover page	338
Apply a cover page layout	337
Create a new cover page layout	335
Manage cover page layouts	333
Edit an existing cover page	332
COVER PAGE	331

Edit menu	370
View menu	373
Item menu	375
Worksheet menu	378
Reports menu	380
Visualize menu	382
Tools menu	383
Help menu	385
MANUFACTURER-SPECIFIC INFORMATION	388

# About 2020 Worksheet

2020 Worksheet is the most powerful furniture specification software in the office design industry. Select and specify furniture products with the most up-to-date and accurate furniture data. Sales teams, design teams and order entry staff can all freely exchange electronic project information.

With 2020 Worksheet, you can:

- Quickly select a common set of options and finishes that can be applied to all related products in a single worksheet
- Create a variety of customized reports and presentation materials
- Assign discounts to an entire worksheet or selected items
- Import from and export to other applications and manufacturer-specific formats
- Manage re-configuration projects and inventory
- Use Custom Catalogs to capture, manage and re-use common furniture configurations

# **Getting started**

When you first open 2020 Worksheet, two windows appear sequentially by default. You can turn them on/off at subsequent launch of the program.

2020 Monthly What's New window (see What's new)

#### Startup Wizard (see below)

From the Startup Wizard dialog box, you get four options:

- Use the Wizard to create new project folders, configure your existing projects and create a new worksheet. For more information see <u>New worksheet using the Wizard</u>.
- Open an existing worksheet from one of your projects folders.
- Open a recently used worksheet from one of your projects folders.
- Start with a **<u>blank worksheet</u>** in your current project folder.

Note: If you check **Don't show this dialog box (default to a blank worksheet)**, this dialog box will not appear the next time you open 2020 Worksheet or create a new worksheet . However, you can still access the Startup Wizard later on by checking the **Show startup wizard...** box in the **Preferences** dialog from the **Tools** menu.

See also Enter and edit items in a worksheet.

# **Hints and procedures**

As in other Windows applications, there are many ways to perform specific tasks in 2020 Worksheet. For example, when copying an item, you can:

- Use the menu bar to select the command
- Click on an icon on the toolbar
- Right-click to access the <u>context menu</u>

Instead of showing different ways of performing the same task, procedures in this help file show you only one way so that you can quickly learn how to use the application.

Note: Make sure all the Worksheet toolbars are displayed for procedures directing you to click icons.

# Associated-visual and visual-only worksheets

If you are working with a worksheet created in CAP Designer , two types can be available:

An associated-visual worksheet (**associated.visual.sp4**) synchronizes all drawing information between Worksheet and CAP Designer with limited user interaction by prompting for an update when required.

A visual-only worksheet (**visual.sp4**) pushes finish and room information (Visual Impression) to the drawing when you open or switch to CAP Designer and you use *Update against worksheet*.

When you open a worksheet, note that:

The associated worksheet has the same name as the drawing it was created from with the extension (.associated.visual.sp4) A visual worksheet can have a different name (.visual.sp4.)

You can open an associated-visual drawing by clicking in the Worksheet toolbar. This command saves the worksheet and automatically updates the associated drawing before opening it.

You can visualize products in parts (scenes) or in whole (entire design) in Visual Impression, by clicking Visualize 👻

- If you no longer want this worksheet to be associated to the CAP Drawing, use the Save As command and save as a different file type.
- If you add an item, the Unplanned icon appears in the first column (Item # column). When you update the drawing in CAP Designer, this unplanned item is saved in the drawing's Non-plan item list (NPIL).

[7]	PF2436	Panel Frame, 24VV x 36H
	).	Skipped Option

The Qty value is the sum of non-planned and planned quantities. To view non-planned and planned values, activate the Non-plan Ct and Plan Ct columns.

In the example below, there are no non-plan quantities of the first item in the worksheet.

ltem	non-Plan Ct	Plan Ct	Qty	List	Ext List
1	0	8	8	\$ 200.00	\$ 1,600.00

If you change the **Qty**, the **non-Plan Ct** value changes accordingly. Notice that the Unplanned

icon also appears in the first column.

ltem	non-Plan Ct	Plan Ct	Qty	List	Ext List
[1]	2	8	10	\$ 200.00	\$ 2,000.00
8					

If you enter a value in **Qty** that is less than **Plan Ct**, Worksheet alerts you and resets the value back to the planned quantity.

- You cannot edit the Mfg, Alt Mfg, Cat and Part Number
- You cannot split items
- When deleting an item, you will see a warning message
- You will not be able to flatten <u>outline levels</u> and <u>standards</u>
- If you have locks in a worksheet, they will be removed when you save the worksheet
- When you cut or copy an item then paste it, that item will be considered as a non-plan item when you update the drawing against the associated worksheet
- You can convert planned items to specials by checking the Special column
- If you update preview images, your images will still be there even if you update the worksheet from CAP Designer later on.
- Standards created in Worksheet are considered as non-planned. When you update the drawing in CAP Designer, the Standard will be listed in the Non-plan item list.
- Outline levels created in Worksheet cannot be tied to a CAP bound within the associated drawing. As such, you cannot insert outline levels in an associated worksheet.

# **Using Help**

The following sections describe how to use options from the Worksheet **Help** menu and the Worksheet help **Toolbar**.

The	question mark - <b>Topics</b> opti	on/icon	7 Topics	takes you to th	e <u>Contents</u> page (	of this help file.
HEL	P					
0	Topics What's New User Guide	F1				
•	Release Notes Website Community					
	2020 on Social Media Training Support	b b b				
۲	Diagnostics Check for Software Updates Check for Catalog Updates	5				
٩	About 20-20 Worksheet		J 🕌 🔍	🖂 📑 💐 🔞	f 🗹 in 😐	0

## **Topics**

This option opens the topics of the help file you are in right now.

## What's new

From the Help menu, click What's New. From the window shown below, you can:

- view announcements on 2020 Technologies commercial software
- read about and download manufacturer catalog updates
- view information about new commands, software fixes and known issues
- download software or catalog updates. See also <u>Check for software updates</u>, <u>Check for catalog</u> <u>updates</u>
- download PDF versions of the 2020 Technologies commercial software user manuals
- b download PDF files of Release Notes (What's New) as they become available
- find training courses for 2020 Technologies software

- view a list of upcoming industry events in which 2020 Technologies will participate
- obtain 2020 Technologies' contact information



## **User Guide**

To display a PDF format of the current help file for reading or printing, from the **Help** menu, select **User Guide**.

## **Release Notes**

To read notes about the current release, from the **Help** menu, select **Release Notes**.

## View the 2020 Technologies website

From the Help menu select www.2020spaces.com.

# Diagnostics

The **Diagnostics** command from the **Worksheet Help** menu is used by technical support to troubleshoot 2020 software.

63		<b>C</b>	0.1			
Software	Filename	Size	Date	Regis	Version	Dr
	CAPPanelBuilder.exe	14809088	08-03-17 07:37:50 PM	No	13.1.0.13123	С
Cantant	CAPDiag.exe	12380136	08-03-17 07:39:40 PM	No	13.1.0.13123	С
content	CAPQuickSearchIndexer.exe	8991744	08-03-17 07:40:52 PM	No	13.1.0.13123	
****	CAPQuickSearchServer.exe	308736	08-03-17 07:39:44 PM	No	13.1.0.13123	С
distributables	CAPSetup.dll	3005440	08-03-17 07:41:14 PM	No	13.1.0.13123	С
	SylDirect.dll	38400	03-22-17 07:00:10 PM	No	13.1.0.13123	s
Security	TilerDes.exe	540672	03-20-17 07:00:10 PM	No	2.1.0.2	F
188	C4DLL.DLL	389632	03-20-17 07:00:10 PM	No		
Tools	😻 CS_ARDLL.dll	245760	03-20-17 07:00:10 PM	No		
10015	👹 IJL20.DLL	729088	03-08-14 03:45:16 AM	No	2.0.15.47	Ir
த்	BGHELP.DLL	1213200	03-08-14 03:47:50 AM	No	6.12.2.633	N
Updates	MFCMIFC80.DLL	23720	03-08-14 12:47:54 PM	No	12.0.21005.1	м
\$ <b>\$</b> _	FlxComm.dll	1888776	03-22-17 07:00:16 PM	No	2016.3.0.0	F
or Reporting	😻 FlxCore.dll	7281160	03-22-17 07:00:16 PM	No	2016.3.0.0	F
	CAPQuickSearchServerX64.exe	349184	08-03-17 07:43:50 PM	No	13.1.0.13123	С
Support	CAP2020Handler.dll	1829888	08-03-17 07:35:48 PM	Yes	13.1.0.13123	С
Support	CAPArchiveHandler.dll	443904	08-03-17 07:35:30 PM	Yes	13.1.0.13123	С
	CAPCatalogHandler.dll	2267648	08-03-17 07:36:08 PM	Yes	13.1.0.13123	С
	CAPCustomHandler.dll	1647616	08-03-17 07:41:28 PM	Yes	13.1.0.13123	С,
	<					>
	Select Source Location			Adv	anced Maintenan	ce

# **Check for software updates**

#### From the Help menu select Check for Updates.

The **Software Manager** appears. From here you can view updates for your system, view update descriptions and download and install updates.

For help on the Software Manager click on the <u>Help</u> Iink/icon at the bottom right of the window.

## **Check for catalog updates**

From the Help menu select Check for Catalog Updates.

The **Software Manager** appears. From here you can view manufacturer catalogs updates, view update descriptions and download and install updates.

For help on the Software Manager click on the <u>Help</u> Iink/icon at the bottom right of the window.

### About 2020 Worksheet

To verify your version number and obtain 2020 contact information, choose **Help**, **About 2020 Worksheet**.

# **Screen components**

This section covers 2020 Worksheet screen components, along with a brief description. Click the component part below this illustration to get more details.

<u>0</u>	20-20 Worksheet - Untitled1 (modified)	- 8 2
20-20 Worksheet Specify, discount,	nd quote furniture products with ease and accuracy Caption bar Toolbars	
File Edit View Item Worksheet Reports Vis	ualize Tools Help - Menu bar	
<u>"</u> , , , , , , , , , , , , , , , , , , ,		Apply Template 👻 📳 Rows 🐨
📑, 💁 Insert -   🗶 🎄 🖈 🔫   🕲 🖽   😢 Ser	d To + ( #), #), 📑 🗃 😫 21 ( 🛊 🕞 🗷 🗆 🖉 ( 🖧 🚽 🖉 ( 🖓 🖓 🖉 🖉 🖉 🕐 Report D	esigns
iontent + 4 ×	Untitled1 (modified) ×	▼ Task Pane
Content 🔹 1 🛱 👷 -	Worksheet	🖉 🕲 🚰   Worksheets 🔹
Zone 1 2 (none) n/a QuickSearch 2 Name Description	Item 🗸 👌 🍂 🧭 Preview Mfg Cat Part Number Part Description Grand Total	Existing ^ Visual Impression Sample
Image: Catalog       Image: Catalog         Image: Catalog       Image: Ca	Task påne Worksheet area	Nove Worksheets New Vorksheet Wizard Blank Worksheet Wizard Blank Worksheet New From Template Clicent Wh Price Adjustments Clicent Wh Price Adjustments Clicent Where Adjustments Clicent Manage Templates Project Nanagement Project Nanagement Project Nanagement
Preview pane	Status bar	Worksheet Actions     •       Worksheet Poperties     •       Print     •       Update Against Catalog     •       Update Against Consider     •       •     Consolidate       •     Consolidate       •     Apply Discount.       •     Apply Discount.
Facilitate Yamise masse 61	Classic 1: 50.00 P. 50.00 S: 50.00 Januar	Item (none) Row (none) Col-(none)

- Caption bar
- 🕨 <u>Menu bar</u>
- Toolbars
- Explorer pane
- Preview pane

- Worksheet area
- Task pane
- Status bar

As in any standard Windows application, you can use <u>context menus</u> to quickly access commands.

Note: The recommended screen resolution is 1280 x 1024. The minimum resolution needed is 1024 x 768. You will need to set your screen resolution to the minimum to easily work within 2020 Worksheet.

# **Caption bar**

The caption bar is primarily a label for the software.

To show or hide the caption bar, right-click near the caption bar and select Caption Bar.

# Menu bar

Located on top of the 2020 Worksheet screen (below the <u>caption bar</u>) are menu names (from **File** to **Help**). They list the tasks you can perform in 2020 Worksheet. You can dock/undock and move the menu bar as you would for toolbars.

To quickly find the help topics and shortcuts that correspond to each menu item, see the following under <u>Command reference</u>:

- 🕨 <u>File menu</u>
- 🕨 <u>Edit menu</u>
- 🕨 <u>View menu</u>
- 🕨 <u>Item menu</u>
- Worksheet menu
- Reports menu

- Visualize
- Tools menu
- 🕨 <u>Help menu</u>

# Toolbars

As in standard Windows applications, toolbars in 2020 Worksheet allow you to perform frequent operations quickly with icons (images representing an action or a command).

You can easily customize toolbars. See the topics below for more information:

- Show or hide a toolbar
- Move a toolbar
- Add and remove buttons
- Custom toolbars

There are several built-in toolbars in 2020 Worksheet, each representing a category of commands. You may change their position to suit your needs. See the topics below for information on each toolbar:

- Standard
- View
- 🕨 <u>Item</u>
- Worksheet
- Report
- Visualize
- 🕨 <u>Help</u>

#### Show or hide a toolbar

- 1. Right-click anywhere in a toolbar area and then mouse over **Tool Bars**.
- 2. Select the toolbar name to toggle the toolbar on or off.

If it is off (no vill appear on your screen (a vill also appear next to its name). Selecting it again will turn it off.

#### Move a toolbar

You can display or hide toolbars, and you can save your selections as a workspace. You can also create your own toolbars.

A toolbar can be *floating* or *docked*. A floating toolbar is displayed anywhere in the worksheet area, and you can drag a floating toolbar to a new location, resize it, or dock it. A docked toolbar is attached to any edge of the worksheet area. You can move a docked toolbar by dragging it to a new docking location. Click-hold the left edge of the toolbar to move it around. To dock/undock a toolbar, double-click on the left ledge.



#### Add and remove buttons

Customizing a toolbar consists of adding buttons to a built-in (Standard, View, Item, Worksheet, Report or Tools) or <u>custom</u> toolbar.

- 1. Click the **View** menu and select **Toolbars**, **Customize**. You can also right-click on any toolbar.
- 2. Click the **Commands** tab in the **Customize** dialog box.
- 3. To **remove** a button from a toolbar, click-hold the button in the **Commands** pane and then drop it anywhere off *outside* the list.

Categories: File Edit View Item Worksheet Reports Visualize Tools Help New Menu All Commands	Commands: New New Worksheet Wizard
---	--

To **add** a button to a toolbar, under **Categories**, highlight the toolbar you want to choose icons from. Click-hold a button under **Commands** and then drag it to the desired toolbar.

ommands Toolbars Too	s Keyboard Menu Options	13	
Categories:	Commands:		
File Edit View	Select Scene	ecial	Part Description
ltem Worksheet	(ione)		
Reports Visualize Tools			Executive High-Back Chair
Help New Menu All Commands			Skipped Option
			Skipped Option
escription: Start Visual In	pression a select a scene to visualize		
			A 7x7 Left Hand Workstation
			A 7x7 Left Hand Workstation

4. Click **Close** when done adding/removing buttons.

Note: Your custom toolbars will not stay if you have multiple sessions of Worksheet open when you customize the toolbars. Make sure only one worksheet is open when customizing.

To reset a modified built-in toolbar:

If you added or removed buttons to a built-in toolbar, here is how you can retrieve the original toolbar:

- 1. Choose View, Toolbars, Customize.
- 2. Click the **Toolbars** tab.
- 3. Click the modified built-in toolbar.
- 4. Click Reset.
- 5. Click Close.

Note: You cannot reset a custom toolbar.

#### **Custom toolbars**

Creating a toolbar consists of using buttons from existing 2020 toolbars to make up a custom toolbar.

- 1. Click View, Toolbars, Customize.
- 2. From the Customize dialog box, click the **Toolbars** tab.
- 3. Click **New** to create a toolbar.
- Type in a toolbar name and click **OK**.
   An empty toolbar appears. The new toolbar will expand as you add buttons to it.
- 5. Click the **Commands** tab.
- 6. Under **Categories**, highlight the toolbar you want to choose buttons from. Click on a button to see its description at the bottom of the dialog.

7. Drag the required buttons to the empty toolbar you just created.



8. Click Close to end.

See <u>Delete a custom toolbar</u>.

Delete a custom toolbar

- 1. Choose View, Toolbars, Customize.
- 2. Click the Toolbars tab.
- 3. Select the custom toolbar to remove.

smmande 1000dis	Tools	Keuboard	Menu	Options		
oolbare.	10010	(inc) provide	incina.			
obbars. ✓Item				Reset		
MyToolbar				Reset All		
Standard				New		
✓ Tools ✓ View				Rename		
Worksheet				Delete		

- 4. Click Delete.
- 5. Click Close.

## Standard

Standard

🖞 🖆 💁 🛃 🔮 🔍 1 🥶 🔯 1 📽 1 🕸 1 🖧 1 🎽 1 🖓 1 🖓 1

lcon	Name	Shortcut	Function
	New	Ctrl+N	Create a <u>new</u> worksheet
	Open	Ctrl+O	Open an existing worksheet
<u>8</u>	Close	Ctrl+F4	Close the current worksheet
	Save	Ctrl+S	Save the current worksheet
	Save As		Save the current worksheet under a different name
	Save All		Save all open worksheets
2	Print	Ctrl+P	Print the current worksheet
	Print Preview		Preview the current worksheet before printing
	Project Properties	Ctrl+Enter	Edit <u>project template</u> settings
	Worksheet Properties	Alt+Enter	Edit <u>Worksheet properties</u> : title, customize column settings, page header and

▼ X

\* 🔜 | 🍓 🔬 | 🥝

			footer setup and price adjustments
	Project Management	Ctrl+M	Edit <u>project notes</u>
	Import Center		Import a file into the current document
	Export Center		Export a file from the current document
8	Cut	Ctrl+Shift+X	Cut selected or if nothing is selected, the current item
	Сору	Ctrl+Shift+C	<u>Copy</u> selected or if nothing is selected, the current item
	Paste	Ctrl+Shift+V	Paste the last item(s) that was cut or copied
<b>•</b>	Undo	Ctrl+Z, Alt+Backspace	Undo an action. The drop down allows multiple steps to be undone at one time
C •	Redo	Ctrl+Y, Ctrl+Backspace	Redo an undone action. The drop down allows multiple steps to be redone at one time
# <b>3</b>	Find	Ctrl+F	Find any string in the worksheet

hao	Quick <u>Find</u>		Enter a value to search the entire worksheet or click the dropdown to reuse a previous search string
	Replace	Ctrl+R	Replace an existing value with a new one
	Preferences	F10	Edit Worksheet Preferences
8	Contact Manager		Add/edit <u>contacts</u> .
<b>@</b>	Help	F1	Open the 2020 Worksheet Help file

# View

View	▼ X
🥏 🔁 🔲 📄 🛛 🖓 🕀 🛛 🎰 Apply Template 👻 🖺	Rows 👻

Icon	Name	Shortcut	Function
	View Contents		Display or hide the <u>Content tab</u> of the Explorer pane.
	View Projects		Display or hide the <u>Projects tab</u> of the Explorer pane.
••	View Task Pane		Display or hide the <u>Task Pane</u> .
	Full Screen View	Ctrl+Alt+V	Turns Full Screen View on and off.
------------------	----------------------------	------------	---
<del>(1)</del>	Step In		Display the products in a <u>Standard</u> or <u>Outline Level</u> .
P	Step Out		Display the Standard or Outline Level.
Apply Template 🔻	Apply Template		Opens a drop-down menu to access the <u>Manage Template</u> function and all available templates that can be applied.
	View Products	Ctrl+Alt+P	Clicking this button turns the product lines on or off. Clicking-holding this button opens a flyout menu which additional view options.
	View Options	Ctrl+Alt+O	Turns the <u>options</u> on or off.
	View Attributes	Ctrl+Alt+A	Turns the <u>attributes</u> on or off in a worksheet
60	View worksheet Links	Ctrl+Alt+L	Turns the <u>worksheet links</u> on or off in a worksheet
8	View Custom	Ctrl+Alt+S	Turns the <u>Standards</u> on or off in a worksheet

	Catalog Standards		
<b>B</b>	View Outline Levels	Ctrl+Alt+T	Turns the <u>outline levels</u> on or off in a worksheet
<b>*</b>	View Price Adjustments	Ctrl+Alt+B	Turns the <u>price adjustments</u> on or off in a worksheet
<b>B</b>	View Subtotals	Ctrl+Alt+U	Turns the <u>subtotals</u> on or off in a worksheet
Rows 🔻	Rows		Opens a drop-down menu that allows rows to be turned on and off in a worksheet.

## ltem



lcon	Name	Shortcut	Function
	Insert Product	Ctrl+Shift+P	Add a product line to the Worksheet. Click and hold the button to open a flyout menu which contains all other insert options explained below.

	Insert Option	Ctrl+Shift+O	Add an option line to the current Worksheet item
<b>**</b>	Insert Attribute	Ctrl+Shift+A	Add an attribute to the current Worksheet item
	Insert Outline Level	Ctrl+Shift+T	Add an outline level to the Worksheet
1	Insert Custom Catalog Standard	Ctrl+Shift+S	Add a <u>Standard</u> to the Worksheet
E.	Insert Custom Catalog Panel Configuration		Insert a panel configuration from a custom catalog into the worksheet
***	Insert Worksheet Link	Ctrl+Shift+L	Add a worksheet link to the Worksheet
	Insert Adjustment	Ctrl+Shift+D	Add a <u>price adjustment</u> to the Worksheet
*8	Insert Subtotal	Ctrl+Shift+U	Add a <u>subtotal</u> to the Worksheet
🖓 Insert 🔻	Insert		Allows the items from the dropdown to be added to the Worksheet

×	Delete	Ctrl+Shift+Del	Delete the current row
Ŷ	Move Up	Ctrl+Shift+UpArrow	Move the current item up in the Worksheet
4	Move Down	Ctrl+Shift+DownArrow	Move the current item down in the Worksheet
	ltem Properties	Ctrl+Alt+Enter	View all the <u>details of the</u> <u>current item</u>
3	Specify	F8	Add finishes in <u>2020 Options</u>
<b>3</b>	Explore	F9	Open Content tab to the location of the current item
😢 Send To 🔻	Send To		Opens a drop-down menu. Sends items to <u>Custom Catalogs</u> , <u>Worksheets</u> , and <u>Drawings</u>
<u>مە</u>	Toggle Flag		Turns the <b>Flag</b> column on and off. Click and hold the button to open the Flag flyout menu. See <u>Flag lines</u> .
() ()	Toggle Lock		Turns the <b>Lock</b> column on and off. Click and hold the button to open the Lock flyout menu. See <u>Lock lines</u> .

# Worksheet

Worksheet	<b>▼</b> ×
🛅 🖸 🤰 😂 Sort Settings 🗸   🏥 🍡 📴 🖂 🗌   🌳   🔩 🛤 🛤	🙉   📠

lcon	Name	Shortcut	Function
	Customize Columns		Opens the <u>Worksheet properties</u> dialog to <u>adjust column setting</u> .
	Resize Columns		Resize all columns automatically so all contents are displayed.
2↓	Multi Sort		Sorts multiple columns.
斜 Sort Settings 👻	Sort Settings		Opens a drop-down menu to access the Manage Sort Settings function and all available saved Sort Settings that can be applied.
× +	Assign		Assigns a value to a column, option or attribute.
<b>~</b>	Block Assign		Copies the options or attributes from one item to others.
	Column Copy		Copies the contents of one column to another column.
	Select All	Ctrl+A	Selects all items in the Worksheet.

	Clear Selection	Esc	Deselects all items in the Worksheet.
7	Consolidate		Merges like items in the Worksheet.
2	Update Against Catalog	Ctrl+U	Updates all or selected items against the Manufacturer or Custom Catalog.
() (),,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Update Against Worksheet		Updates items against a selected Worksheet by product number or tag.
	Update Preview Images		Updates preview images of items in the Worksheet.
Ø	Apply Discount	Ctrl+D	Opens the <u>Discount</u> dialog box.
DÜG	Show Associated Drawing		If the current worksheet is <u>associated to a</u> <u>drawing</u> , opens AutoCAD and loads the associated drawing.

# Report

Report 👻	×
🔮 🏢 过 🛛 🕑 Report Designs	*

lcon	Name	Function
	Quick Report	Creates a quick report based on the columns displayed in the worksheet.
	Edit Report Design	Edit the active report in the Report Designer.
	Manage Reports	Create, edit, and manage your report designs.
2	Refresh Report View	Refreshes the report view to show any changes in design or content of the current worksheet.
● Report Designs →	Report Designs Drop Down	Shows the available standard and user reports that can be applied.

# Visualize

If the current worksheet was created from a CAP Designer drawing, you can open Visual Impression to

visually specify product and room finishes by clicking the Visualize Visualize to button

If scenes were defined in CAP Designer for the drawing, you can choose among named scenes. Otherwise, choose **Entire Design**.

See also Visualize a scene or all products in Visual Impression

# **Explorer pane**

The Explorer pane is a powerful navigation utility that lets you browse multiple furniture catalogs at one time, as well as find all the files that you will use and create.

Content	· + A 🕹	-
content		
Zone 1	USD USD	
QuickSearch	X	
Name	Description	1
EXP	20-20 Example Catalog	4
🎊 💽 DMO	20-20 Enriched Data D	
🎊 🔊 MMM	3M	
澤 💽 925	9 To 5 Seating	
ABC	ABCO	
🂱 👧 AIS	AIS	
🎏 🔊 ALE	Alera	
🎏 🔊 ASC	Allseating	
🎏 🔊 ALS	Allsteel	
AMS	American Seating	
AMG	American Seating GSA	-
•	4	
Manufacturer		

The Explorer pane consists of four tabs:

- <u>Content tab</u>: displays manufacturer catalogs.
- <u>Projects tab</u>: navigates to all project folders containing worksheet files and CAP Designer drawings.
- Search tab: allows you to search for products and displays products found after a search.
- Bookmarks tab: shows the bookmarks saved on your system.

See the following topics to move or hide the Explorer bar:

- Move the Explorer bar
- Auto-hide feature (Explorer bar)
- Show or hide Explorer bar tabs

### Move the Explorer pane

With the flexibility of <u>AutoHide</u>, floating and docking, you can tailor the 2020 Worksheet screen to the way you work.

Explorer is normally docked at left of the worksheet area, but you can undock it and drag it elsewhere.

- 1. Click and hold the title bar at the top.
- 2. Drag the Explorer pane to the location you prefer. The window can float above the worksheet or you can dock it. To dock on either side, top, or bottom, move the mouse as you are dragging to the control buttons.



Click either arrow to dock on the left, on the right on top or below the worsheet area

When Explorer is docked, you can resize the window by dragging on the vertical bar between Explorer and the Worksheet area.



Auto-hide feature (Explorer pane)

By putting the Explorer pane on auto-hide you can see more of your worksheet when you are not using any of the Explorer tabs.

1. Click on the push pin icon in the title bar.



The Explorer bar will collapse and be on the far left side of your screen.

2. To access any of the Explorer tabs, hover over the desired tab icon and that tab will open.



Show or hide Explorer pane tabs

By default, all of the Explorer pane tabs are visible when you open 2020 Worksheet.

You can close and open each of the different tabs individually by doing any of the following:

- From the menu bar select View, Explorer Bars. Select the tab you want to show or hide.
- Right-click on any toolbar or button in 2020 Worksheet then select Explorer Bars. Select the tab you want to show or hide.
- You can turn on/off the Content, Projects tabs and Task pane on and off by using these toolbar buttons:



Note: Instead of hiding each Explorer tab individually, a more efficient way to work with the Explorer pane is to set it to <u>auto hide</u>.

## **Content tab**

Use the Explorer pane Content tab to access the manufacturer catalogs you have installed.



From the **Content** tab you can:

- Navigate catalogs
- Use <u>QuickSearch</u> to find products
- Drag and drop products to a worksheet
- Bookmark products used often

Note: To find an item quickly in the Contents tab, right-click on the corresponding graphic and choose **Explore**.

To customize the appearance of the **Content** tab:

- 1. From the menu select Tools, Preferences to open the Preferences dialog.
- 2. Click <u>Content</u> to control the manufacturers and catalogs displayed here. By default, all catalogs are loaded and available at the same time.

Click Explorer to show content as a tree instead of as a list.

Click <u>Common</u> to show grid lines between each item in the **Content** tab.

# **Projects tab**

The Explorer pane Projects tab allows access to your project hierarchy. You can open 2020 Worksheet files or AutoCAD drawings. You can quickly copy an item from one worksheet to another worksheet or drawing without opening the original worksheet. You can also quickly view the contents of a <u>custom</u> <u>catalog</u>, including <u>Standards</u>.



You can view a quick description and details of an item in the Projects tab by using the horizontal scroll bar at the bottom or resizing the Projects tab.

See <u>Projects</u> for more information.

## Search tab

The Explorer pane Search tab allows you to search for products. Clicking the Search icon  $\square$ .

Once you have finished searching, this tab shows the products found. This tool is useful when searching multiple catalogs for products with a common element (panels, for example). These items are consolidated under the Search Results.

From here you can select products and <u>send them into drawings or worksheets</u> or <u>drag and drop them</u> as you would from the <u>Content tab</u> of Explorer.

Search	▼ ₽	×
Q		
Name	Description	
- Search Results (477 items)		
BF1230	Monolithic Panel, 30H x 12W	
PBF1830	Monolithic Panel, 30H x 18W	=
PBF2430	Monolithic Panel, 30H x 24W	
PBF3030	Monolithic Panel, 30H x 30W	
PBF3630	Monolithic Panel, 30H x 36W	
E PBF4230	Monolithic Panel, 30H x 42W	
E PBF4830	Monolithic Panel, 30H x 48W	
📄 PBF1236	Monolithic Panel, 36H x 12W	
E PBF1836	Monolithic Panel, 36H x 18W	
🖹 PBF2436	Monolithic Panel, 36H x 24W	
🖹 PBF3036	Monolithic Panel, 36H x 30W	
💼 PBF3636	Monolithic Panel, 36H x 36W	
E PBF4236	Monolithic Panel, 36H x 42W	
PBF4836	Monolithic Panel, 36H x 48W	
B PBF1242	Monolithic Panel, 42H x 12W	
E PBF1842	Monolithic Panel, 42H x 18W	
BF2442	Monolithic Panel, 42H x 24W	
E PBF3042	Monolithic Panel, 42H x 30W	
E PBF3642	Monolithic Panel, 42H x 36W	
PBF4242	Monolithic Panel, 42H x 42W	
E PBF4842	Monolithic Panel, 42H x 48W	
PBF1248	Monolithic Panel, 48H x 12W	
PBF1848	Monolithic Panel, 48H x 18W	
PBF2448	Monolithic Panel, 48H x 24W	
PBF3048	Monolithic Panel, 48H x 30W	
PBF3648	Monolithic Panel, 48H x 36W	
PBF4248	Monolithic Panel, 48H x 42W	
PBF4848	Monolithic Panel, 48H x 48W	
PBF1254	Monolithic Panel, 54H x 12W	
PBF1854	Monolithic Panel, 54H x 18W	
PBF2454	Monolithic Panel, 54H x 24W	
PBF3054	Monolithic Panel, 54H x 30W	
PBF3654	Monolithic Panel, 54H x 36W	
E DDEADEA	Manalithia Danal 5/14 x /2/1/	

## **Bookmarks tab**

The Bookmarks tab contains a list of <u>bookmarks</u> that you have added. From here you can <u>organize</u> <u>bookmarks</u> or open a bookmark folder to view its list of products.

To open a bookmark folder:

- 1. From the Explorer pane Bookmarks tab, click on 
  <sup>I</sup> to expand a folder. By default, bookmarks are saved under the **Content** folder.
- 2. Continue clicking on the plus sign until you see the list of products in a bookmark.

Bookmarks	<b>▼</b> ₽>
🛃 😈	
Name	Description
<b>⊞</b> <del>☆</del> Bookmarks	

Note: If you don't see the bookmarks you just added, click 💴.

3. <u>Drag and drop a product</u> to a worksheet or <u>send it</u> to a drawing or worksheet.

# **Preview pane**

To show the Preview pane, click the View menu and Preview Bar.

As you mouse over selections in the <u>Explorer</u>, the Preview pane displays images. Also, you can preview multiple items if you select a <u>standard</u> from a <u>custom catalog</u> (Projects tab). Note that the standard must have been created within CAP Designer, not Worksheet.

For information on what you can do in the Preview pane, see Preview a product.



Note: Just like the Explorer pane, you can <u>auto-hide</u> and <u>move</u> the Preview pane.

# Worksheet area

The worksheet area is where you can: add <u>products</u>, <u>discounts</u> and <u>price adjustments</u>; <u>specify finishes</u>; customize the worksheet <u>cover page</u>; and <u>produce reports</u>.

Within the worksheet area there are <u>worksheet tabs</u> so you can work on many worksheets at the same time.

Each worksheet has four tabs:

- Worksheet
- Global Options
- Cover Page
- Report

## Worksheet tabs

Worksheet tabs allow you to have many worksheets open at the same time.

1. To move between worksheets click on the desired tab.

	test w	orkshe	eet ×		Visual Impr	ession Sa	ample (fo	r AutoCAD R17)	)
Wo Wo	rksheet	t				]			
Item	×	8	1	ø	Preview	Mfg	Cat	Part Number	

2. If the worksheet is not visible, click the drop-down arrow to the right of the tabs and select the desired worksheet.

📓 test worksheet 🗙 📓 Visual Impression Sample (for AutoCAD R17)		•	Task Pane 👻 🖣 🗙
Worksheet	Level		test worksheet
have a grant and the second se			Visual Impression Sample (for AutoCAD R17)
item V 🗿 / Preview Mig Cat Part Number Part Description	1.1.1		

Each worksheet has four view tabs:

- Worksheet
- Global Options
- Cover Page
- Report

## Worksheet tab

The Worksheet tab is the default Worksheet area view. From this tab you can <u>enter and edit items in a</u> <u>worksheet</u>.



To resize the worksheet text size, from the menu select **Tools**, **Preferences**, then click <u>Display</u>. To show or hide rows, see <u>Show or hide rows</u>.

#### See also:

- Resize columns
- Display or hide a column
- Customize columns
- Description of worksheet columns

#### Show or hide rows

You can choose to view or hide <u>products</u>, <u>options</u>, <u>attributes</u>, <u>standards</u>, <u>outline levels</u>, <u>worksheet links</u>, <u>price adjustments</u>, <u>subtotals</u> and the grand total.

To show or hide rows, from the **View** menu, select **Rows**, then select the item type.

Note: When you hide an item type, you will not be able to insert an item of that type later on unless you show the item type again.

For example, if you hid **Price Adjustments**, then go to the **Item** menu then select **Insert**, the **Price Adjustments** type will be disabled.

#### **Resize columns**

#### To resize a column:

1. Position the cursor on the edge of the area of column to resize until you see the cursor change to a double arrow.



2. Click and hold the mouse button, drag to resize, then release when you reach the desired dimension.

#### To automatically resize a column:

- 1. Place your cursor to the right of a column heading and wait for the double arrows to appear.
- 2. Now double click and the column size will automatically adjust to the appropriate width, based on all line items.

#### To resize all columns to view all the information in each column:

Right-click on any column header and select **Resize Columns**. You may need to adjust the **Part Description** column after this function.

Display or hide a column

- 1. Right-click on any column header.
- 2. Select Columns.
- 3. Select the group to which the column belongs.
- 4. Click the column you wish to turn on or off.

A check mark beside a column name indicates that the column is displayed in the worksheet.

Part Description	Category	Alias 1	Qty	List	Ext List
c Panel, 30H x 12W 💷	Customize <u>C</u> olumns Resi <u>z</u> e Columns		1	\$ 395.00	\$ 395.00
Option	Sort Columns	•	Catalog Info	• <	Preview
Open Bookshelf 30L x 30H			Counts Discounts International	> <mark>&gt;</mark> > <del>&gt;</del> > <del>&gt;</del>	Mfg Cat Part Number
Option Option			Item Manager Miscellaneous	nent 🕨	Option Group
High-Back Chair			Price Zones Pricing		Category Weight
Option Option			Totals	÷	Unit List
edestal Desk Arc Front ?L x 36W			views	<b>,</b>	Catalog Tag 1 Catalog Tag 2
Option Option Option					Catalog Location Alt Mfg Catalog Order
					Catalog Date

Note: If you want to turn off multiple columns, it is faster to use <u>Customize columns</u>.

# **Customize columns**

Worksheet has over 40 columns of information. Showing all these columns would take up too much room on the screen and on a <u>printout</u>. As such, some columns are not displayed by default. Use **Customize columns** to show certain details of items like Tag or discount information, or to hide details such as the List Price.

To customize columns, right-click on any column header then select **Customize Columns**.

In the **Worksheet Properties** dialog, you can view columns using either the **Standard** or **Grouped** view. In **Grouped View**, columns are organized by categories.

То:	Do this:
	Check or clear the check boxes next to the column names.
Display or hide a column	In Grouped View, if you want to check all columns under one group, check the group name.
	You can also right-click on the column to show or hide.
Modify a column's position in the worksheet (you can do this only in Standard view)	Select the column and drag it up or down.
	Change the <b>Text</b> value.
Change the column header text	This field can be used to add your own customized columns. For example, click on one of the <b>Alias</b> columns, then change the <b>Text</b> value.
	Even if you change the column header text here, its field name will not be changed in <u>Report Designer</u> .

Resize the column width	Beside <b>Width</b> , enter the value in pixels. For a quicker way, see <u>Resize Columns</u> .
Define the justification of text in the column	Change <b>Justify</b> to Left, Center or Right.
Change the data type accepted by the column	Beside <b>Type</b> , select the data type. You can only change the data type of certain columns.
	Beside <b>Mode</b> , select:
Disable a column, make it read-	<b>Disabled</b> - user cannot click on the column
writable	Read Only - user can click but cannot modify a value
	Read and Write - user can click and modify a value

#### See also: Description of worksheet columns

Note: You can save a column configuration in a worksheet template and apply the template to other worksheets so that they will have the same column settings. See <u>Worksheet templates</u>.

#### **Description of worksheet columns**

Click on the group name below to see a brief description of each column in the group.

- Catalog Info columns
- Counts columns
- Discounts columns
- International columns
- Item Management
- Miscellaneous columns

- Price Zones columns
- Pricing columns
- Tagging columns
- Totals columns
- Views columns

### Catalog Info columns

Column	Description
Preview	See <u>Preview column</u>
Mfg	Manufacturer code
Cat	Catalog
Part Number	Part Number
Option Group	Option Description
Part Description	Part Description
Category	Furniture type
Weight	Weight
Volume	Volume
Unit List	Option up charges
Unit Purchase	Option up charges
Catalog Tag 1	For future use

Catalog Tag 2	For future use
Catalog Location	Location of item in Catalog hierarchy
Alt Mfg	Alternate Manufacturer. The Mfg code of the <u>archived</u> <u>catalog</u> .
Catalog Order	Number representing the order that a product appears in a catalog. The first product encountered is 1, and so on. You can use this field to sort parts in an order similar to paging through the printed catalog.
Catalog Date	The date the catalog file was compiled by 2020 and not the date the catalog was last updated.

### **Counts columns**

Column	Description
non-Plan Ct	Used for a worksheet associated to a CAP Designer drawing. Displays the quantity that was added in 2020 Worksheet.
Plan Ct	Used for a worksheet linked to a 2020 Office Sales design or a worksheet associated to a CAP Designer drawing. Displays the quantity that is in the plan or drawing.
Pkg Type	Package Type
Pkg Ct	Package Count
Count	Pkg Count x Quantity
Qty	Quantity

### **Discounts columns**

Column	Description
Sell-%	Sell Discount off list
Sell+%	Sell Discount over Purchase
Purchase%	Purchase Discount off list
Margin%	Margin Discount
DPP%	Dealer Purchase Price Discount

### International columns

Column	Description
List Adjust	Percentage adjustment applied to List
Exch Rate	Exchange rate percentage
Exchg Base	Exchange Base amount
Exch List	Exchange List amount
Exch Purchase	Exchange Purchase amount
Exch Sell	Exchange Sell amount
Exch Margin	Exchange Margin amount

#### **Item Management**

Worksheet has five columns used for additional control on a line by line basis:

- Color Displays a user-specified color, which can be set multiple ways.
- <u>Complete</u> indicates if the item is <u>optioned</u> and complete, optioned but needing an update, incomplete or unknown
- Lock lock items from being updated or edited
- Flag flag an item for a specific reason; also set automatically when an item is not found after updating against a catalog
- Annotate add or edit an item note

The status of these columns will be saved with the worksheet and remain set even when you close the worksheet.

When the **Complete**, **Flag** and **Lock** columns are <u>turned off</u>, the icons will still be visible in the **Item** column.



Note: When the **Flag** and **Lock** columns are turned off, you cannot change their values unless you turn on the column or use the <u>Item Detail</u> view of the <u>Task Pane</u>.

When printing a worksheet, you can choose whether or not to print the **Flag**, **Lock** and **Complete** icons in the **Item** column when those columns are not visible. This preference is set by going to **Tools**, **Preferences**, then selecting <u>General</u>. By default this preference is turned on.

### Miscellaneous columns

Column	Description
Special	Checkbox to indicate if this is a custom item. See <u>Change an</u> <u>existing part into a custom item</u> .
Quote #	Field for Design Express users that corresponds to the PRJ# field. This identifies a special item.
Include 1	Checkbox used to include the worksheet item. Defaults to checked. This column could be used to include the item when calculating a price adjustment or discount.
Include 2	Checkbox used to include the worksheet item. Defaults to checked. This column could be used to include the item when calculating a price adjustment or discount.
Include 3	Checkbox used to include the worksheet item. Defaults to checked. This column could be used to include the item when calculating a price adjustment or discount.
Exclude 1	Checkbox used to exclude the worksheet item. This column could be used to exclude the item when calculating a price adjustment or discount.
Exclude 2	Checkbox used to exclude the worksheet item. This column could be used to exclude the item when calculating a price adjustment or discount.

Exclude 3	Checkbox used to exclude the worksheet item. This column could be used to exclude the item when calculating a price adjustment or discount.				
Date	Requested date for the item. Double-click to show the current date. Click on the day, month or year then type the new value or use the Up or Down buttons. Use the rightmost button to select the date using a calendar.				

### Price Zones columns

Column	Description				
PZ	Prize Zone				
PZ Description	Price Zone Description				
PZ Currency	Price Zone Currency				

### Pricing columns

Column	Description					
List	Vfg. published list					
DPP	Dealer Purchase Price					
Purchase	Purchase amount					
Sell	Sell amount					
Margin	Margin amount					
User 1	User defined amount					

User 2	User defined amount
User 3	User defined amount
Base	Base price of an item, which is the unit list price of the single product alone, without any option up-charges added in

## Tagging columns

Column	Description					
Тад	Tag					
Generic	Various uses					
Alias 1	User defined field					
Alias 2	User defined field					
Alias 3	User defined field					
Building	Building					
Floor	Floor					
Department	Department					
Person	Person					
Finish Code	A tag field used with Panel Builder. You set this value in Panel Builder and use it in Worksheet to select the appropriate options.					

### **Totals columns**

Column	Description					
Ext List	Extended List total amount					
Ext DPP	Extended Dealer Purchase Price total amount					
Ext Purchase	Extended Purchase total amount					
Ext Sell	Extended Sell total amount					
Ext Margin	Extended Margin total amount					
Ext User 1	Extended User total amount					
Ext User 2	Extended User total amount					
Ext User 3	Extended User total amount					
Ext Weight	Extended Weight total					
Ext Volume	Extended Volume total					
Ext Base	Extended Base total amount					

#### **Views columns**

Column	Description					
Plan View	Legacy field - Cadvance					
Elev View	Legacy field - Cadvance					
3D View	Legacy field - Cadvance					

#### Preview column

ltem	$\checkmark$	8	Preview	Mfg	Cat	Part Number	Part Description
1			_	GNC	GNC	CHEXEC	Executive
	<ul> <li>Image: A start of the start of</li></ul>		2				

If an item in a worksheet has a preview image available, the image will be displayed in the **Preview** column. The image is displayed in 64 x 64 pixels.

A preview image for an item is displayed in the **Preview** column if the item:

- was <u>dragged and dropped</u> from the <u>Explorer pane</u> to the worksheet area the image displayed in the **Preview** column will be the same as the one displayed in the Preview pane
- b was pasted onto the worksheet from another item that contains a preview image already
- was sent from one worksheet to the current one and the item from the source worksheet already contains a preview image
- comes from merging items that already contain a preview image

A Preview is also displayed if Update Preview Image 🔜 is clicked.

The **Preview** column is empty if:

- the item was added using the Send To command from CAP Designer, Search or Options
- the item comes from imported data
- the item was created from a takeoff (file was created from CAP Designer using the Create Worksheet File command)
- the image does not exist

Note: When there is no image is displayed in the **Preview** column, use the **Update preview images** command to display the image. See the topic <u>Update preview images</u>.
# **Global Options tab**

Global Options allows you to apply the same finish to more than one line item if the finish is available. This allows for more consistent specifications. See <u>Global Options</u> for more information.

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### **Cover Page tab**

Cover page is a customizable page that will pull information form the worksheet and <u>Worksheet</u> <u>Properties</u> to populate fields of information.

See <u>Cover page</u> for more information on how to use one of the default cover pages or create your own cover page.



### **Report tab**

The **Report** tab allows you to use one of the default report configurations or create your own report configurations for printing worksheet information.

See <u>Reports</u>.

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	Prepare	d For:			Job: PO Number: By: Mark Smith Notes:
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	2	1	UDTRANBBF2024	Single Pedesta Attachment	Transitional for Desk
	3	1	UDTRANB8F2024	Single Pedesta	Transitional for Desk
		_			

# Task pane

By default, the Task pane is visible when you open 2020 Worksheet. To find out how to hide or display the Task pane, see <u>Show or hide the Task pane</u>.

The Task pane is similar to the <u>Explorer pane</u>. There are 3 views that contain different sets of information:

- Worksheets provides quick access to commonly used tasks
- Item Detail lists all of the available columns of information for a selected or current line item in the current worksheet
- Option Clipboard stores options that can be applied to other line items within the current worksheet or saved as an Option Set for use in other worksheets

#### To access a view:

Click on the drop-down arrow and select the view.



Note: To see more of your screen when you are not using the Task pane, use the <u>Auto-hide feature</u>. You can also <u>Move the Task pane</u>.

### Show or hide the Task pane

By default, the Task pane is visible when you open 2020 Worksheet. To show or hide the Task pane, select **View**, **Task Pane**, **Visible** from the menu.

See also:

- Move the Task pane
- Auto-hide feature (Task pane)

### Move the Task pane

The Task Pane can be docked (attached to the side of the Worksheet window) or undocked (unattached and floating in the middle of the Worksheet window).

If you drag the undocked Task Pane by its title bar, docking arrows will appear on the screen. These arrows indicate the locations where the Task Pane may be docked. Hover the cursor over one of the docking arrows to automatically dock the Task Pane along the edge of the screen.

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#### **Auto-scroll bars**

If the contents of a Task Pane view is too extensive to be viewed at one time, auto-scroll bars appear at the bottom and/or the top of the view. Hover over these auto-scroll bars to automatically scroll the view.



## Auto-hide feature (Task pane)

By putting the Task pane on auto-hide you can see more of your worksheet screen when you are not using any of the Task pane features.

1. Click the push pin on the Task pane.



The Task pane will collapse and be on the far right side of your screen.

2. To access the Task pane, mouse over the Task pane label or icon and it will open to the last view you were in.



### Worksheets view

The Worksheets view of the Task pane gathers most popular commands for worksheets.

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) 🕝 🚰   Worksheets		
Existing		
Visual Impression Sample		
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TestWorksheetFromWS		
Visual Impression Sample (for )	Aut	o
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🚰 More Worksheets		
New		*
🌮 New Worksheet Wizard		
Blank Worksheet		
New From Template		
Client with Price Adjustments	S	*
Client		-
🏠 Manage Templates		
Projects		
🚭 Project Management		
📸 Project Properties		
Worksheet Actions		*
🚰 Worksheet Properties		
📑 Print		
🕵 Update Against Catalog		
📲 Update Against Worksheet		
Consolidate		
Apply Discount		

In the Worksheets view you can:

- Open one of the last 5 worksheets you worked on
- Create a new worksheet quickly, either <u>blank</u> or from a <u>template</u>
- Manage worksheet templates
- Manage projects
- Set worksheet properties
- Print the worksheet
- Update items against a catalog
- Update items against a worksheet
- Consolidate identical items
- Apply a discount or discount schedule

### **Item Detail view**

If you have several columns in your worksheet, use the Item Detail view to quickly see all columns of an item, instead of scrolling across the worksheet.



The Item Detail view provides information about any line item that is marked as <u>current</u> in the active worksheet, as well as consolidates commonly performed commands related to line items.

The item information portion of Item Detail displays every property for the current line item and the corresponding value assigned to that property. Property names are displayed as Column headers in the worksheet.

Some of the commands available in Item Detail view are:

- Preview an item
- Specify (assign options to) the line item
- Explore to that item's location in the catalog content
- Send an item to a worksheet or a drawing
- Move a line item up or down in the worksheet

Note: If you change a value in a column (for example: changing **Qty**), the Item Detail will be updated automatically to display the new value. The reverse is also true. If you change a value in the Item Detail view, the line item in the worksheet is automatically updated.

# **Option Clipboard view**

The Option Clipboard view is used for quickly applying options to a worksheet from similar items in the same worksheet, a previously opened worksheet, or from a saved Option Set file.

Task Pane	▼ # ×
🚱 🕝 🚰   Option Clipboard	τ.
Option Trail Actions	
Copy Paste	
Paste with Criteria	
× Remove Properties	
Option Clipboard	*
EXP (unnamed) Skipped Option Skipped Option	

For more information on what you can do in the Option Clipboard, see Option Clipboard.

# Status bar

The Status bar contains general information about the current worksheet, such as:

- the Total List, Purchase and Sell Price for the worksheet
- whether you are on a Product line, an <u>Option</u> Line or an <u>Attribute</u> line
- where you are in the current worksheet: the item number, the row and column (similar to Microsoft Excel)

For Help Topics, press F1 L: \$7,941.00 P: \$7,941.00 S: \$7,941.00 E Product Item: 1 of 5 Row: 1 Col: 6

Note: You can hide the Status bar by choosing View, Status Bar.

# **Context menus**

Context menus—right-click menus—display a subset of commands that are specific to the context or the element selected.

To display a context menu, right-click. For example, in the <u>Content tab</u> of the Explorer Pane, mouse over the product you want to specify finishes for, right-click and then click **Specify**.



# **Create a worksheet**

There are several ways you can create a worksheet:

- create a worksheet from CAP Designer or Giza. For details on creating a worksheet from any of these applications, consult the application's help file.
- create a <u>new blank worksheet</u>

create a <u>new worksheet using the Wizard</u>

## New blank worksheet

- 1. Click in on the <u>Standard toolbar</u>.
- 2. Click Blank. You now have a blank worksheet where you can start placing products.

Note: In the **Startup Wizard** you can check **Don't show this dialog (default to a blank worksheet)** so that the next time you click the **New** icon, a blank worksheet is created automatically. This setting will be saved in your <u>preferences</u>.

Note: If you click **Wizard**, you can use the Wizard to configure your projects and create a new worksheet.

#### See also:

- New worksheet using the Wizard
- Save a worksheet
- Close a worksheet
- Add products using drag and drop
- Add products using Insert

# New worksheet using the Wizard

When you create a worksheet using the New Worksheet Wizard, the selected project's template is applied to the worksheet. The worksheet is also automatically saved in the appropriate project folder.

- 1. From File menu select New Worksheet Wizard.
- 2. Select the **Projects** folder where you want to save the new worksheet.

Note: To create a new project folder, click on All Projects or a project folder then click New. Type in a name for the new folder. See <u>Manage projects</u> for other project folder commands.

- 3. Click Next.
- 4. Modify the project's properties (Template info). Click Next.

Note: To change which options are checked whenever this dialog box appears, from the menu, select Tools, Preferences then select <u>Common</u> preferences.

5. Enter the name of the worksheet and then click Finish.

#### See also:

- New blank worksheet
- Save a worksheet
- Close a worksheet
- Add products using drag and drop
- Add products using Insert

# **Open, save and close a worksheet**

Refer to the following topics:

- Open a worksheet
- Save a worksheet
- Close a worksheet

# **Open a worksheet**

- 1. Click an the <u>Standard toolbar</u>.
- 2. If you want to apply the <u>current project's template</u> when opening the worksheet, check the box under Project Support.
- 3. In the **Look in** field, choose the disk/folder where the required design is located.
- 4. In the List of files and folders area, select the file then click Open.

Note: To open a file you recently worked on, select **File**, **Open Recent Worksheet**. Select the file from the list. Worksheet lists the 10 last files you worked on.

# Save a worksheet

To save the current worksheet:

- 1. Click an the <u>Standard toolbar</u>.
- 2. If this is the first time you are saving the worksheet, you will see the Save As dialog.

In the **Save in** field, choose the disk/folder where you want to save the worksheet.

In the **File name** field, type in the name of the file and press ENTER.

To save the current worksheet under a different name, click in the <u>Standard toolbar</u>. Do the same actions as in step 2 above.

If the current worksheet is an associated worksheet (associated.visual.sp4) and you want to save it as a visual-only worksheet (visual.sp4), use Save As Visual Worksheet.

If the current worksheet is a visual (visual.sp4) worksheet and you want to save it as a classic .sp4 file, use Save As Classic Worksheet.

To save all modified worksheets, click *like* in the <u>Standard toolbar</u>. Do the same actions as in step 2 above.

See also:

- Save as single level worksheet
- Associated-visual and visual-only worksheets

**Close a worksheet** 

To close a worksheet, click the **Close** button in the worksheet tab.



To close all open worksheets, select File, Close All.

# Import, export and convert data

2020 Worksheet gives you the flexibility to work with other applications and file formats. You can:

- Import data
- Export data
- Convert data

# Import data

You can create worksheets quickly by importing data from other applications.

- 1. Make sure **to have a blank worksheet open**. The import function will add the imported products to your current worksheet.
- 2. From the File menu, select Import Center.
- 3. In the **Import Center** dialog, select the format of the file you want to import. When you select a format, its description is displayed on the right side.

ormat Name	Extension	-	Import an XML file compiant with the OEDA standard (version 2, 12,0) for				
Common			purchase orders.				
OFDA XML 2.12.0	xml		For more information about this				
FDA XML 3.0	xml		format, please visit the Office				
FDA XML 4.0	xml		Furniture Dealers Alliance website at				
IF	sif		www.ordanet.org				
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and a farmed and slide towards an	المرابع المارية المرابع والمستح						
ect a format and click Import, or	simply double clici	c a for	mat above.				

Note: If you want to remove some formats from the list, click **Select Formats.** In the **Select Formats for Import** dialog clear the checkboxes of the formats you want to hide then click **OK**.

- 4. Click **Import** to choose the file.
- 5. From the **Choose a file to import from** dialog box select the file to be imported then click **Open**.
- 6. Once the import is done, you may see an **Import Log** reporting all the products imported. Click the **Items with Warnings or Errors** tab to see if any items had error messages. You may save the log if you want.
- 7. After the import is complete you may be prompted to <u>consolidate</u> identical items in the worksheet and <u>update</u> your worksheet against the catalogs. Click **Yes**.

Note: Worksheet remembers the last used format so the next time you open the Import Center, the last used format is automatically selected. The Steelcase SpecSIF option is for files with .ssf extensions.

This is used to SIF from Hedberg. The Steelcase Partial SpecSIF is for files with .psf extensions. This is also used to SIF from Hedberg.

# **Export data**

This feature lets you export 2020 Worksheet files to a variety of formats.

- 1. From the File menu, select Export Center.
- 2. Select the format of the file. When you highlight a format its description is displayed to the right.

Format Name	Extension		
Common	-		
CAP Studio SIF	sif		
Expanded Legacy CAPSIF	sif		
Legacy CAPSIF	sif		
OFDA XML 2.12.0	xml		
OFDA XML 3.0	xml		
OFDA XML 4.0	xml		
SIF with Combined Part+Option Nu	sif		
General			
Comma Separated Values	CSV		
Excel	xls		
HTML	htm	-	
D 1	10		

Note: If you want to remove some formats from the list, click **Select Formats.** In the **Select Formats for Export** dialog clear the check boxes of the formats you want to hide then click **OK**.

- 3. If you want standards and outline levels <u>flattened</u>, and identical items <u>consolidated</u> in the new file, check **Export from a flattened and consolidated view of the worksheet**.
- 4. Click Export.
- 5. In the **Choose a file to export to** dialog select the folder, type the file name then click **Save**.

#### Notes:

- Worksheet remembers the last used format so the next time you open the Export Center, the last used format is automatically selected.
- CAP Studio SIF has all the new 32-bit SIF codes applied to it and can be read by other software applications like EDI (electronic ordering) systems
- Legacy CAPSIF is a classic CAPSIF file that CAPSpex created using old 8-bit code
- Steelcase SpecSIF (.SSF) option is used to SIF to Hedberg
- Steelcase Partial SpecSIF (.PSF) is also used to SIF to Hedberg
- Teknion SIF includes <u>panel configurations</u> created from Worksheet
- Before exporting to a Global Order Entry XML or a Global Contract SIF, you must set certain fields in the Worksheet Properties. See Global Order Entry in the 2020 Worksheet Manufacturer-Specific Information Help.

# **Convert data**

From the **Convert** sub-menu you can:

- Export multiple files at one time. You can convert multiple worksheets to OFDA XML or to CAPSIF for Order Entry type files. This is a great time-saver if you have multiple worksheet files that need to be converted.
- Convert a Giza User Library to a Custom Catalog that can be used in 2020 Worksheet.
- <u>Convert a Design Express project</u> and its spec groups into worksheets

### **Export several files**

To export several files to an OFDA XML file or CAPSIF for Order Entry:

- 1. From the File menu, select Convert.
- 2. Select Worksheet to OFDA XML or Worksheet to CAPSIF for Order Entry.
- 3. Select your files. Use the SHIFT key to pick a range of files or the CTRL key to select non-adjacent files.
- 4. Click **Open**.
- 5. In the **Browse for Folder** dialog, select the destination folder of the converted files.
- 6. If you are converting to OFDA XML, select the OFDA XML version then click OK.
- 7. Click **OK** when the **Conversion Complete** message appears.

## **Convert a Giza Specifier User Library**

You can convert User libraries created in Giza Specifer to 2020 Worksheet <u>custom catalogs</u>. All of the information that was stored in the library, including pricing, will be available.

You will find custom catalogs in the **Projects** tab of the Explorer bar. You can add new items to the converted custom catalog.

To convert a Giza Specifier User Library:

- 1. From the File menu, select Convert.
- 2. Select **Giza User Library to Custom Catalog.** The **Add** to Custom Catalog Wizard dialog will open.
- 3. Select an existing **Custom Catalog** to send the converted items to or <u>create a new</u> <u>one</u>.
- 4. Click Finish.
- 5. Click **OK** when the **Conversion Complete** message appears.

### **Convert a Design Express project**

To convert a Design Express project and its spec groups into worksheets:

- 1. From the File menu, select Convert.
- 2. Select Design Express Project.
- 3. Click .... to select the folder which contains the Design Express project.
- 4. In the Browse for Folder dialog, select the project folder then click OK.
- 5. Leave **Update Converted Worksheets** checked if you want to <u>update converted</u> <u>items against manufacturer catalogs</u>.

- 6. Leave **Open Converted Worksheets** checked if you want to open each converted worksheet.
- 7. Click Convert.
- 8. Under **Conversion results**, you will see the status of the project you are converting. The status is updated as the conversion progresses.

This may take a few minutes, please wait.

9. Once you see the status of the project and the created worksheets as finished, click **Close**.

Note: You will find the worksheets in a new project folder under Local Projects. This folder will have the same name as the Design Express project. During the conversion, the program creates a <u>worksheet template</u> based on properties common to all spec groups. After the conversion, Alias 1, Alias 2 and Alias 3 columns are renamed Tag 1, Tag 2 and Tag 3.

# Merge and purge worksheets

Refer to the following topics:

- Merge worksheets
- Purge a worksheet

# Merge worksheets

The **Merge** feature allows you to combine 2 or more worksheets at a time. This is a very useful tool if you want to quickly create one large worksheet from many.

- 1. Make sure that you have one worksheet open.
- 2. From the **File** menu, select **Merge**.
- 3. Select one worksheet or as many others you would like to merge into your current worksheet by using the SHIFT and CTRL keys.
- 4. Click Open.

Items from the selected worksheets will be added automatically to the current worksheet. Merge will automatically <u>consolidate</u> your worksheet for you.

## **Purge a worksheet**

When a worksheet is saved over and over, it grows in size. You can use the **Purge** command periodically to control a file's size. This command mimics the purge command available in AutoCAD.

Note: This operation cannot be undone. However, a backup file will be created in the same folder as the original file.

- 1. From the File menu, select Purge.
- 2. When you see the confirmation message, click Yes.

# Print and e-mail a worksheet

Refer to the following topics:

- Print a worksheet
- E-mail a worksheet

# **E-mail a worksheet**

From the File menu select Send.

A new mail message appears, with the current worksheet set as attachment.

This feature works with any Messaging Application Programming Interface (MAPI) compatible program, such as Microsoft Outlook.

# **Print a worksheet**

All visible columns of the worksheet will be printed. We recommend that you do a print preview before printing.

Note: The page will be horizontally scaled to fit all the visible columns on one page. Therefore the total width of your columns will affect the size of the font printed — the wider the columns and the more columns you are viewing, the smaller the font.

- 1. From File menu click Print.
- 2. In the **Print** dialog select the **Printer**, the **Print range**, the **number of copies**.
- 3. Click **Properties** to change the selected printer's properties such as the page orientation (portrait or landscape) and paper source.
- 4. Click OK.

#### See also:

- Preview before printing
- Example Print panels only
- Page Setup
- Set the default printer
- Print multiple levels
- Header / Footer

## **Preview before printing**

- 1. Click in the <u>Standard toolbar</u>.
- 2. Using the buttons at the top left of the preview tab, you can print, go to the next or previous page, view two pages at a time, zoom in and out, and close the print preview.
- 3. If the print preview looks correct, click Print.

If you need to modify the worksheet before printing, click **Close** then make the changes.

### **Example - Print panels only**

In this example, instead of printing a list of all the items in the worksheet you will print a list of panels.

- 1. <u>Sort</u> your worksheet by Part Description, Part Number and Catalog code.
- 2. <u>Select</u> all the panels on your worksheet.

3. From the File menu select Print Preview.

Notice that only the panels are shown. If you have any items selected, worksheet will assume that you will be printing selected items only and will automatically insert a subtotal of the selected items in the printout.

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- 4. From the File menu select Print.
- 5. In the **Print** dialog box, verify that **Selection** is checked in **Print Range**.
- 6. Click **OK**.

Note: Use the <u>Advanced Find Feature</u> to select a number of similar items on your worksheet without sorting your worksheet.

### Page Setup

Page setup controls the way the worksheet prints. Once you change it for your worksheet it will stay that way. This information is **linked to a specific worksheet**, not to the computer.

- 1. From the File menu, select Page Setup.
- 2. Change any of the following settings: Margin, Distance To Frame, Appearance, Orientation and Centering.
- 3. Under Miscellaneous you can choose to insert a page break after each subtotal.
- 4. Click **Print Preview** to preview your page setup.
- 5. Click **OK** to save the page setup or **Print** to send the worksheet to the printer.

Note: Even if you are printing to a black and white printer, check **Print in Color** to see subtotals better on your printout.

### Set the default printer

To set the default printer, paper size and orientation for all open worksheets:

- 1. From the File menu, select Print Setup.
- 2. Select the printer, paper size and orientation.
- 3. Click OK.

Note: This information is linked to the computer, not to a specific worksheet.

## **Print multiple levels**

A quick way to print all the levels (Standards or Outline) in a worksheet is to use the Print Levels tool. Before you print you will need to <u>set the default printer</u> using the Print Setup dialog.

- 1. From the menu select **File**, **Print Levels**.
- 2. In the **Print Levels** dialog box, select which worksheets you wish to print. For each line checked you will have one printout.
- 3. Check whether you also want to print the <u>cover page</u> and/or the <u>report</u>.
- 4. Click **Print**.

Note: The title on each sheet will be the name of the Standard or the Outline level.

### Header / Footer

Select File, Page Header/Footer to customize the header and footer when printing a worksheet.

This command opens the <u>Worksheet Properties</u> dialog, with the **Header/Footer** tab active.

Notice the \$ codes in the Header/Footer tab. This is a simple computer code instructing the program to pull the data from the worksheet. These codes are used because the information may change but the placement and format will remain the same.

In addition to using the \$ codes, you may also type in any information you would like to appear in the header or footer. Click in the proper area (Header or Footer tab; Left Aligned, Centered or Right Aligned) and type the text.

Note: When modifying the Header/Footer, insert the code first before typing in text. Otherwise, the text you entered will be overwritten by the code.

То	Do this
Modify the header	Click the <u>Header</u> tab.
Modify the footer	Click the <u>Footer</u> tab.
Access the list of codes and view their current values	Click the <b>Legend</b> button.
Adjust the space given to the header and footer	Click Page Setup.
Change the font type and size	Click Font.

**See** <u>Example: customize the header</u> for a step-by-step example of adding a line to the header.

#### Header tab

Use the **Header** tab to place information at the top of the worksheet.

Left Aligned	Centered	Right Aligned	^
\$R		\$P of \$N	

**\$R** is a default symbol for the **Title** of the worksheet. The Worksheet Title is set in the <u>General tab</u> of the <u>Worksheet Properties</u> dialog box. By default, the title appears in the upper left corner of the worksheet .

**\$P** is a default symbol for current page number and **\$N** is the default symbol for number of pages. By default, the page number appears in the upper right corner of the worksheet.

Note: Click the Legend button for all legend codes and descriptions.

#### See also:

- Header / Footer
- Footer tab
- Example: customize the header

#### Footer tab

Use the **Footer** tab to place information at the bottom of the worksheet.

Left Aligned	Centered	Right Aligned	^
şı.	l	\$0	
			>

**\$L** is the default symbol for the path and filename of the worksheet. By default, this appears in the lower left corner of the worksheet.

**\$D** is the default symbol for the Date/Time stamp. By default, this appears in the lower right corner of the worksheet.

Note: Click the **Legend** button for all legend codes and descriptions.

#### See also:

- Header / Footer
- Header tab
- Example: customize the header

Example: customize the header

In this example you will add a line to the header.

1. In the Header tab, click the second cell under the column Left Aligned.

Left Aligned	Centered	Right Aligned	1
\$R		\$P of \$N	
Header	Footer /	1	Y
I neader A	rooter /		

- 2. Click the **Legend** button to access the list of codes.
- 3. In the Header/Footer Legend dialog, select the code \$C Prepared by Company Name then click Insert Code.
| Code  | Description              | Currant Value   |
|-------|--------------------------|---|
| Code  | Drepared By Company Name | 20-20 Technologies  |
|       | Date and time            | 20-20 1001000005  |
| F     | File Name                | Ted1 cn4  |
| 1     | File Name with Full Path | C:\Documents and Settings\galaca\My Documents\CAP\Projects\Te |
| N     | Number of Pages          | (calculated when printing)                                    |
| 0     | Project Note             | (Currently Blank)   |
| P     | Current Page Number      | (calculated when printing)                                    |
| R     | Worksheet Title          | Learning Worksheet  |
| ORD1  | Order Type               | (Currently Blank)   |
| ORD2  | Order P.O. Number        | (Currently Blank)   |
| ORD3  | Order Invoice Number     | (Currently Blank)   |
| ORD4  | Order Quote Number       | (Currently Blank)   |
| ORD5  | Order Contract Number    | (Currently Blank)   |
| ORD6  | Order Note               | (Currently Blank)   |
| 10007 | Andre Consist Discount   | (Commette Black)  |

4. Type Designed by: in the box, before **\$C**.

Left Aligned	Centered	Right Aligned	^
\$R		\$P of \$N	
Designed by: \$C			
	Faster /		~

- 5. Click Font. Select Font = Arial, Font Style = Regular and Size = 12. Click OK.
- 6. Click Page Setup to open the Page Setup dialog.
- 7. Click **Print Preview** in the **Page Setup** dialog. Notice the header that you just entered.



8. Click Close.

# **Worksheet properties**

You can customize each worksheet with the Worksheet Properties icon in the Standard toolbar.



The information you enter in the Worksheet Properties dialog box is saved with the specific worksheet. To apply this setting to other worksheets use <u>Worksheet templates</u>.

There are six panes available in the Worksheet Properties dialog box:

- <u>General</u> to enter the worksheet title (for reports and other outputs as opposed to worksheet file name) and worksheet contact information.
- Order to enter order information.
- <u>Columns</u> to customize the columns displayed and their order in the worksheet.
- Header/Footer to customize the header and footer when printing the worksheet.
- <u>Adjustments</u>- to add price adjustments such as taxes, installation fees and shipping charges.
- International to specify the currency used for the worksheet and any other currency to convert prices to. Get coaching on this.

#### General

Use the **General** properties to define the worksheet title and the contact information about a job or installation.

The worksheet title appears on top of the worksheet. *Do not confuse worksheet file name with worksheet title*.



The information you enter here will be used in both the worksheet <u>cover page</u> and the <u>reports</u>.

1. Click on the <u>Standard toolbar</u>.

The General information will appear by default.

- 2. Enter the worksheet title.
- 3. Click the button beside one of the contact fields, such as **Prepared For**:



4. In the <u>2020 Contacts Manager</u> dialog box, select the contact that will go in the contact field then click **OK**.

You can create a new contact here if necessary. The contact name is displayed on the dialog. If you want to remove this contact, just click the button. 5. Under Miscellaneous Text, there are three text fields.

Check the appropriate box to activate the **Edit** button. Click **Edit** to open the **Misc. Text** dialog. Enter text then click **OK**.

6. Click **OK** to save and close or **Apply** to save and keep the **Worksheet Properties** dialog open.

See also: Edit contact information for the current worksheet only

Note: Checking the **Security** box then entering a password will protect your worksheets.

#### Order

Use the **Order** information to define the P.O. Number, Quote Number, Invoice Number, etc. In here, you can also enter the required deposit value and the Valid Through date; the date after which the quoted price will no longer be valid. All this information will be used in <u>reports</u>.

1. Click on the <u>Standard toolbar</u>.

2. Click Order.

<b>1</b>	Order Information					
General	Order Type: P.O. Number:	1		•		
Columns	Invoice Number:					
All ader/Footer	Contract Number:					P.C
djustments	Order Note:					÷
ternational	Order Details					00000
	Special Discount (S.Q. #):				Net:	erms:
	Billing Terms:			•	List:	
	Shipping Terms: Ship Via:	<u></u>		•	Deposit:	
	Order Date:	Request	Date:	Valid Thro	ough:	
	9/11/2013 -	9/11/20	13 -	9/11/20	13 -	
	Request Type:			•		
	Before Delivery Con	tact:	Phone:		Hours	-
	After Hours Contact	3	Phone:		_	

3. Enter the order information and then click **OK**.

## Columns

Use the **Columns** information to define which columns will be displayed in the worksheet. From here, you can also change the column header text and the column order.

- 1. Click on the <u>Standard toolbar</u>.
- 2. Click Columns.

Note: Click Grouped View if you want to view columns by <u>category</u>.

3. <u>Customize the columns</u> then click **OK**.

#### **Header/Footer**

Use the Header/Footer pane to customize the header and footer when printing a worksheet.

- 1. Click on the <u>Standard toolbar</u>.
- 2. Click Header/Footer.
- 3. See <u>Header / Footer</u> for the rest of the steps.

## Adjustments

Use the **Adjustments** information to insert price adjustments to your worksheet, such as tax, bottom line discounts, shipping charges, etc.

- 1. Click on the <u>Standard toolbar</u>.
- 2. Click Adjustments.
- 3. Click Add.
- 4. See <u>Price Adjustments</u> for details on adding a price adjustment.

#### International

Use the International pane to specify a quotation currency and other currencies to convert prices to.

Currency and exchange rate should not be changed unless your business received coaching.

WARNING: You may damage your worksheet pricing information.

# **Worksheet templates**

Once you have the <u>worksheet properties</u> set up the way you like, you can save the settings to a template. The template can then be applied to any worksheet.

Within a template you can save: customer contact information, order information, column settings, header and footer settings, and price adjustments.

You can save templates on a network directory so all CAP users can have access to them. This is a great way to standardize the look of worksheets being printed from your firm.

#### See also:

- Create a new template
- Create a template from current worksheet settings
- Select a default worksheet template
- Apply a template to a worksheet

#### Create a new template

- 1. From the View menu, select Templates, Manage Templates.
- 2. Click New in the Manage Worksheet Templates dialog.
- 3. Enter the template name and then click **OK**.
- 4. In the Template Properties dialog, select any of the following tabs:

<u>General</u> - to enter the worksheet title and worksheet contact information <u>Order</u> - to enter order information <u>Columns</u> - to customize the columns displayed and their order in the worksheet <u>Header/Footer</u> - to define the header and footer when printing the worksheet <u>Adjustments</u> - to add price adjustments such as taxes, installation fees and shipping charges International - reserved for international businesses

- 5. Click **OK**.
- 6. To apply this template to the current worksheet, click **Apply**.

# Create a template from current worksheet settings

Before using the current worksheet setting to create a template, you must save the worksheet first.

- 1. From the View menu, select Templates, Manage Templates.
- 2. In the Manage Worksheet Templates dialog, click Capture.
- 3. Enter the template name then click **OK**.

Now that template is saved, it can be <u>applied</u> to any other worksheet. If you need to make changes to it, you can edit, rename or delete it.

## Select a default worksheet template

- 1. From the View menu, select Templates, Manage Templates.
- 2. Select the template in the Manage Templates dialog box.

Manage Worksł	leet Templates		×
Default Folder:	C: \Users \josee \Documents \CAP \Templates		
Template Name			
Client with F Client Company	rice Adjustments		
New	Edit Rename Delete Capture	Set Default	Apply
NOTE: Setting a	default template overrides the standard project template behavior	Clear Default	Close

- 3. Click Set Default. Notice that the template name is now in bold.
- 4. Click Close.

Note: If you wish to use the standard project template again later on, click **Clear Default**.

### Apply a template to a worksheet

- 1. From the View menu, select Templates, Manage Templates.
- 2. In the Manage Templates dialog, select the template in the list then click Apply.
- 3. In the Apply Template dialog, specify whether the contact information, column arrangement, page setup and header/footer and price adjustments will be taken from the template, from the current worksheet, or from both (applicable to price adjustments only). You can choose to keep the default settings.

Note: To change which options are automatically checked whenever this dialog appears, from the menu choose Tools, Preferences then select <u>Common</u> preferences.

4. Click OK.

Note: A quicker way to apply templates is to use the template pulldown from the **Template** toolbar.

6	Apply Template 👻 🖺 Rows				
6	Manage Templates				
	Client with Price Adjustments				
	Client				
	Company				

# **Projects**

Project folders help you organize your drawings and worksheets. For example, if you are working on the Head office project for client ABC, you can create a project folder called **ABC Head office** and store all worksheets and drawings in that folder. You can also create sub-folders within a project folder.

The <u>Projects tab</u> of the <u>Explorer pane</u> provides the fastest way to access your project hierarchy.

See:

- Create a project folder
- Manage projects
- Project templates
- Apply a project template to a worksheet
- Open a worksheet from the Projects tab
- Copy products from other worksheets
- New worksheet using the Wizard

#### Create a project folder

To better organize your worksheets so that you can save them in separate projects, create project folders.

- 1. Click the Projects tab of the Explorer bar.
- 2. Right-click on Local Projects or a project folder.
- 3. Select New, Project.

4. A folder called **New Project Folder** is created. Rename the project folder.

You will now be able to <u>save</u> worksheets and drawings in this project folder.

Note: You can also create a project folder using the **<u>Project Management Wizard</u>**.

#### **Manage projects**

You can create, rename or delete projects by using the Project Management Wizard. You can also use the Wizard to add notes to the project or create a project template.

- 1. From the File menu, select Project Management.
- 2. In the Project Management Wizard, double-click on All Projects.
- 3. Do any of the following and then click **Close**:

То:	Do this:		
Create a new	<ol> <li>Click on All Projects or a project folder then click New.</li> </ol>		
projectionaci	2. Type in a name for the new folder.		
	Note: This will delete all the contents in the folder.		
Delete a project folder	<ol> <li>Make sure that none of the files in this folder are opened.</li> </ol>		
	2. Click on the folder then click <b>Remove</b> .		
Rename a	1. Click on the folder then click <b>Rename</b> .		
project folder	2. Type in a new name.		

	1. Click on the folder then click <b>Add</b> .
Add this project to <b>My Projects</b>	<ol><li>Type in the name of the project if necessary.</li></ol>
	Note: This will simply create a link to the project. You can keep track of projects you work on frequently in the <b>My Projects</b> folder.
Change the	1. Click on the folder then click <b>Next</b> .
project's	2. Type in any notes for the project.
enter notes for	3. Click <b>Edit</b> to change the project's template.
the project	4. Click <b>Finish</b> .

Note: You can access the same commands listed above by right-clicking on a project folder. These commands are also accessible by right-clicking in the **Projects** tab of the **Explorer pane**.

# **Project templates**

You can edit project templates by using the **Project Management Wizard**. Project templates work the same way as <u>worksheet templates</u>, that is, you can <u>apply a project template to a worksheet</u>.

- 1. From the File menu, select Project Management.
- 2. In the **Project Management Wizard**, double-click on **All Projects** or click the + sign to view all the project folders.
- 3. Click on the folder then click **Next**.
- 4. Click **Edit** to change the project's template.

5. In the **Template Properties** dialog, select any of the following tabs:

<u>General</u> - to enter the worksheet title and worksheet contact information <u>Order</u> - to enter order information <u>Columns</u> - to customize the columns displayed and their order in the worksheet <u>Header/Footer</u> - to define the header and footer when printing the worksheet <u>Adjustments</u>- to add price adjustments such as taxes, installation fees and shipping charges

6. Click Finish.

#### Apply a project template to a worksheet

Just as you can <u>apply a worksheet template</u> to a worksheet, you can apply a project template to a worksheet.

- 1. Click the <u>Projects tab</u> of the <u>Explorer bar</u>.
- 2. Right-click on Local Projects or a project folder then select Properties.

3. In the **Project Properties** dialog, click **Apply** to apply the project's template to the current worksheet.



4. In the **Apply Template** dialog, specify whether the contact information, column arrangement, page setup and header/footer and price adjustments will be taken from the project template, from the current worksheet, or from both (applicable to price adjustments only). You can choose to keep the default settings.

Note: To change which options are checked whenever this dialog appears, from the menu choose **Tools, Preferences** then select <u>Common</u> preferences.

- 5. Click **OK** in the **Apply Template** dialog.
- 6. Click Finish.

Note: You can capture the current worksheet's properties and apply it to the project's template by clicking **Capture** in the **Project Properties** dialog. You can edit the project's template by clicking **Edit** in the **Project Properties** dialog.

# Open a worksheet or drawing from the Projects tab

If you saved a worksheet or drawing in your projects folder, you can open it from the Projects tab.

- 1. Click the <u>Projects tab</u> of the <u>Explorer pane</u>.
- 2. Open the folders by double-clicking on them or clicking on the +.
- 3. If you double-click on a worksheet file name, Worksheet will automatically open the file.

If you double-click on a drawing, AutoCAD will launch and automatically open the drawing.

# Copy products from other worksheets

- 1. Click the <u>Projects tab</u> of the <u>Explorer pane</u>.
- 2. Open the folders by clicking on the +.
- 3. Use the + to see the product in a previously created worksheet.

4. Click on an item in the worksheet and drag and drop it to the current worksheet.



Notice the line is copied completely, including options, attributes and discounting. The original file is not modified in any way.

You can also use the **Projects** tab to copy items from <u>custom catalogs</u> to worksheets. See <u>Reuse and</u> <u>update items from a custom catalog</u>.

# **Preferences**

Worksheet preferences allow you to control specific characteristics of the program such as which catalogs are listed, Explorer bar appearance and default folders.

You can modify the following preferences:

- General set printing, column sorting and file auto-save defaults
- Display change font styles and sizes
- <u>Common</u> modify Apply Template, Update Against Catalog and Consolidate criteria default settings
- Explorer customize the Explorer bar
- QuickSearch change how QuickSearch works
- Specification modify 2020 Options, Global Options and Option Clipboard settings
- Visualization set the search order that 2020 Worksheet will use when looking for a product's preview image
- <u>Content</u> select the manufacturers and catalogs you would like to access
- Folders and files select folders where documents are stored
- User assign the current user and logo

International - please contact Customer Support if you need to set a currency other than USD

# **General preferences**

1. From the **Tools** menu select **Preferences**.

By default, the **General** preferences are displayed.

	Preferences
General	Project Support  ✓ Show startup wizard screen when creating new worksheets  ✓ Use 'My Projects' to organize large project folders
Common	Validation     Show tips related to Visualization     Show tips related to Associated Worksheets
Explorer Comparison QuickSearch	Show ups related to Associated Worksheets     Validate pricing by flagging possible problems with the relationship between List,     Purchase, and Sell prices
Specification	<ul> <li>Initially scale the printing to fit all columns on a single page (requires a restart of the application)</li> <li>Print Bookmark, Lock and Complete icons in the Item column when those columns are not visible (requires a restart of the application)</li> </ul>
Content	Sorting Ask for confirmation before sorting worksheet columns
a User	✓ AutoSave Save interval: 15 minutes When auto-saving, create a backup copy of the file. This backup file will be located in the same folder as the original file, and will have the same name as the original file with a 'backup' extension
	OK Cancel Apply Help

 Modify any of the general preferences, click OK to save and close, or click Apply to save and keep the Preferences dialog box open.
 Those that are self-explanatory are shortly described below or linked to the

Those that are self-explanatory are shortly described below or linked to the corresponding topic:

Category	Settings			
Project Support	Show startup wizard screen when creating new worksheets			
Validation	Show tips related to Visualization and Show tips related to Associated Worksheets to display tips on how the current worksheet will interact with <u>Visual Impression</u> and any <u>associated</u> worksheet.			
Printing	Horizontally scale the printing to fit all columns on a single page (requires a restart of the application)			
Sorting	Ask for confirmation before sorting worksheet columns			
AutoSave	<ul> <li>Check AutoSave to enable the automatic save of worksheets.</li> <li>Click the scroll button to change the</li> </ul>			
	Auto-Save interval.			
	Check When auto-saving, create a backup copy of the file (). to create a file with a '.backup' extension			
	Note that 'Untitled' worksheets will not be auto-saved or backed up.			

### **Display preferences**

Use **Display** preferences to set worksheet font styles and sizes. By default, Worksheet displays each row type in a different color. For example, options are displayed in a light blue background and attributes are displayed in a light yellow background.

You can change color selections for your background and text as well as set the height of certain rows, such as product or grand total.

- 1. From the **Tools** menu select **Preferences**.
- 2. Click Display.

		Preferences			×
	Worksheet Font				
General	Face: Arial		×	Size: 10	~
Display	Colors	Prolonged	Terete		Deld
		Background:	lext:	Height:	Bold:
Common	Product:	Default ∨	Default ∨	2 👻	
3	Option:	Default 🗸	Default V		
Explorer	Attribute:	📃 Default 🗸	Default 🗸		
QuickSearch	Worksheet Link:	📃 Default 🗸	📕 Default 🗸	2	
QuickSearch	Standard:	Default 🗸	Default 🗸	2	
Specification	Panel Configuration:	Default 🗸	Default 🗸		
<b>6</b>	Outline Level:	Default 🗸	Default 🗸	2	-
Visualization	Custom Catalog Item:	Default 🗸	Default 🗸		
Content	Price Adjustment:	Default 🗸	Default 🗸	2	
	Grand Total:	Default 🗸	Default 🗸	2	•
Folders + Files	Subtotal:	Default 🗸	Default 🗸	1	•
8	Invalid Field:	Default 🗸	Default 🗸		
User	Color Column:	Default 🗸			
	Defaults				
		ОК	Cancel	Apply	Help

3. Modify any of the following settings:

Font face (style) and size of text in the worksheet
Background or text color of each row type. Select Defaults to reset the background or text color to the standard default setting.
Height of Product, Worksheet Link, Standard, Outline Level, Price Adjustment, Grand Total and Subtotal rows.
Display Product, Worksheet Link, Standard, Panel Configuration, Outline Level, Custom Catalog Item, Price Adjustment, Grand Total and Subtotal rows in bold.

4. Click **OK** to save and close.

Or, click **Apply** to save and keep the **Preferences** dialog box open.

Note: The **Defaults** button will reset all the colors, sizes and fonts back to the standard default settings.

### **Common preferences**

- 1. From the **Tools** menu select **Preferences**.
- 2. Click Common.

	Preferences
General	Send To Insert items by appending at bottom of worksheet Insert items above current item
Display Common	List Views           Use extended List View features         Show grid lines between rows and columns
🎯 Explorer 🥰	Apply Template A template contains all of the information contained in Worksheet Properties and can be applied to new or open worksheets to quickly configure these characteristics of a worksheet.
QuickSearch 🔋 Specification	Please specify how items from Worksheet Properties get handled when applying a template: From the From the Combine Template Worksheet Both
b Visualization	Contact Information:         Image: Contact Information: <thend: contact="" information:<="" th="">         Image: C</thend:>
Content	Page Setup:     Image: Constraint of the setup of the set
Folders + Files	Show these choices each time a template is applied
de user	Default SIF File Encoding: ANSI V
	Defaults Update Against Catalog Consolidate Criteria Update Against Worksheet
	OK Cancel Apply Help

3. Modify any of the following settings and then click **OK** to save and close. Or, click **Apply** to save and keep the **Preferences** dialog open.

Category	Settings
Send to	<ul> <li>Change the behavior when <u>sending items to a worksheet</u>:</li> <li>Insert items by appending at bottom of worksheet</li> </ul>
	Insert items above current item
List Views	Change the settings for the <u>Content tab</u> of the <u>Explorer bar</u> if the Content tab is <u>displayed in list view</u> .
	<ul> <li>Use extended List View features (hover select, single click, underlining)</li> </ul>
	• Check <b>Show grid lines between rows and columns</b> to display grid lines to separate items.
Apply template	Change default settings when <u>applying a worksheet template</u> .
	Check whether or not you want to see these choices each time a template is applied.
Export	Change the default SIF coding from ANSI to Unicode when <u>exporting data</u> .
Defaults	Click <b>Update Against Catalog</b> to set the default update values and default price zones selected when doing an <u>update against a</u> <u>catalog</u> .
	Click <b>Consolidate Criteria to</b> select the default columns used when performing a <u>consolidate</u> .
	Click <b>Update Against Worksheet</b> to set the default update values selected when doing an <u>update against a worksheet</u> .

#### **Explorer preferences**

Use Explorer preferences to set the Explorer pane's behavior and appearance.

- 1. From the Tools menu select Preferences.
- 2. Click Explorer.



3. Change any of the following settings:

Show Content tab as a list instead of a tree Show Price Zone bar on the Content tab Show Status Bar on all Explorer tabs Select to always display the Search, Bookmarks tabs in Explorer. Note that the Contents and Projects tabs must always be displayed. Simplify hierarchies by skipping the root item if it is an "only child" - when there is only one choice in a catalog, automatically select that item Watch for changes to custom catalogs and worksheets and refresh changed items automatically

- 4. Click **OK** to save and close.
  - Or, click Apply to save and keep the Preferences dialog open.

Note: You can also access Explorer preferences from the View menu, Explorer Bars, Preferences.

### **QuickSearch preferences**

Use the QuickSearch preferences to set the <u>QuickSearch</u> behavior.

- 1. From the **Tools** menu select **Preferences**.
- 2. Click QuickSearch.

	Preferences
*	✓ Enable QuickSearch
General	Common Settings
Dicplay	Maximum number of matching part numbers to display: 50
	$\hfill\square$ Don't display the suggestion list if there are more matches than this maximum
Common	$\checkmark$ Exclude disabled catalogs from the suggestion list
3	✓ Check if the index needs to be updated every time QuickSearch is started
Explorer	Worksheet
e	✓ Display the suggestion list when typing in the worksheet's Part Number field
QuickSearch	Update the item before it is inserted into the worksheet
3 Specification	
10 specification	Explorer
Visualization	Show the QuickSearch bar
٢	
Content	
Delders Siles	
Folders + Files	
user 🗠	
	Rebuild Index Update Index
	OK Cancel Apply Help

3. Change any of the following settings and then click **OK** to save and close. Or, click **Apply** to save and keep the **Preferences** dialog open.

Category	Setting
Enable QuickSearch	If this check is cleared, QuickSearch will be deactivated both in CAP Designer and 2020 Worksheet.
	Note: Clearing this checkbox will deactivate other QuickSearch settings in this dialog. If you choose to enable QuickSearch again later on, make sure to check the appropriate settings below.
Common Settings	• Enter the maximum number of matching part numbers to display in the list
	• Don't display the suggestion list if there are more matches than this maximum
	Exclude disabled catalogs from the suggestion list
	Check if the index needs to be updated every time     QuickSearch is started
Worksheet	• Display the suggestion list when <u>typing in the worksheet's Part</u> <u>Number field</u>
	Update the item before it is inserted into the worksheet
Explorer	Show or hide the <u>QuickSearch</u> field in the Explorer Pane.

Note: A large index file (IDX) is included with every CAP Studio installation. The **Rebuild Index** button rebuilds this entire file from scratch. Use the **Rebuild Index** button only when there seems to be corruption in the IDX file, as it takes a few minutes to finish.

2020 Worksheet automatically updates the IDX file whenever there is a change to content, for example, if you manually add or delete catalogs. Use the **Update Index** button to force an update, if it seems as though QuickSearch is not displaying all the part numbers. Since this is an incremental update it takes less time than rebuilding the index.

# **Specification preferences**

Use Specification preferences to set 2020 Options, Option Clipboard, and Global Options settings.

- 1. From the **Tools** menu select **Preferences**.
- 2. Click Specification.

	Preferences
i in the second	20-20 Options ✓ Use Default Options Number of option trails to remember for Default Options: 5 🚖 ✓ Automatically select "only child" options ✓ Automatically show option notes
QuickSearch	Option Clipboard     ✓ Show tooltips in the Option Trail list     Global Options     ✓ Use Quick Options to intelligently select related options in similar option groups     When switching to the Global Options view
Golders + Files	Refresh the Global Options list:       Prompt v         When switching away from the Global Options view         Apply changes made in the Global Options list:       Prompt v         Group By Defaults
	OK Cancel Apply Help

3. Change any of the following settings and then click **OK** to save and close. Or, click **Apply** to save and keep the **Preferences** dialog box open.

Category	Settings
2020 Options	Use Default Options - use the default options set by the manufacturer
	Enter the Number of option trails to remember for Default Options
	Automatically select "only child" options - when there is only one option available, automatically select it
	Automatically show option notes - display all notes on options
Option Clipboard	<b>Show tooltips in the Option Trail list</b> - Show the Option Trail properties dialog when the cursor hovers over an option trail in the clipboard.
Global Options	Use <u>Quick Options</u> to intelligently select related options in similar option groups
	Choose to prompt before, always or never refresh the <u>Global Options</u> list when switching to the Global Options view.
	Choose to prompt before, always or never apply changes made in the Global Options list when switching away from the Global Options view.
	Click <b>Group By Defaults</b> to set the default columns used to group global options

# **Visualization preferences**

Use the **Visualization** preferences to set the search order that 2020 Worksheet will use when looking for a **Product Preview**.

- 1. From the **Tools** menu select **Preferences**.
- 2. Click Visualization.

	Preferences	×
General Display Common Explorer QuickSearch	Media Search Order The list below contains the possible types of media which the Preview Window, found throughout Worksheet, can display. When the Preview Window is set to 'auto', the first available type will be displayed. Unchecked types will be ignored. Uive Rendered Photograph Dimensional Context Rendered Image Text	<b>†</b>
Specification Specification Visualization Content Content Folders + Files User	Disable presentation finish materials	
	OK Cancel Apply	Help

3. Use the **Up** or **Down** arrow to change the order.

When displaying a preview image, 2020 Worksheet will go through this list and look for the image corresponding to the first image type. If an image is not available, the program will go down the list until it finds an image.

4. Add a check mark if you want to **Disable presentation finish materials** in the product preview.

#### **Content preferences**

Use **Content** preferences to change the settings for the <u>Content tab</u> in the <u>Explorer pane</u>.

You can select the manufacturers and catalogs you want to have access to. Also, you can change the default price zones for each catalog, and uninstall unwanted catalogs.

1. From the **Tools** menu select **Preferences**.

#### 2. Click Content.



3. Change any of the following settings and then click **OK** to save and close. Or, click **Apply** to save and keep the **Preferences** dialog box open.
| То  | Do this  |  |  |
|---|--|--|--|
| Enable or                                       | Check or uncheck a manufacturer in the list.   |  |  |
| disable a<br>manufacturer in<br>the Content tab | When you disable a manufacturer it will be "grayed" out in the Content tab. Disabling a manufacturer is not the same as <u>uninstalling it</u> .                   |  |  |
|   | If you want to hide a disabled manufacturer, check <b>Hide disabled</b><br><b>Manufactures and content in listings</b> located at the bottom of the<br>dialog box. |  |  |
| Enable or                                       | 1. Select a manufacturer in the list.  |  |  |
| disable a catalog in the Content                | 2. Check or uncheck a catalog.   |  |  |
| tab   | When you disable a catalog it will be "grayed" out in the <b>Content</b> tab. Disabling a catalog is not the same as uninstalling it.                              |  |  |
|   | If you want to hide a disabled catalog, check <b>Hide disabled</b><br><b>Manufactures and content in listings</b> located at the bottom of the<br>dialog box.      |  |  |
| Move a<br>manufacturer or                       | Select the catalog or manufacturer, then click 🗲 or 🗲.   |  |  |
| catalog up or<br>down in the list               | Note: If you use a particular manufacturer or catalog often, you can move it to the top of the list.   |  |  |
| Add a<br>manufacturer                           | 1. Click 🛄 .   |  |  |
|   | 2. Enter a unique 3-character code for the manufacturer.   |  |  |

	3. Enter the manufacturer name.
	4. Select the folder where the content for the
	new manufacturer will be located. Make a
	new folder if necessary.
Add a catalog	1. Select the manufacturer.
	2. Click then navigate to the catalog.
	Once it has been added, you will be able to
	access the products and pricing contained
	in that catalog.
	Use this to install a catalog such as one with an old price list or to
	install a discontinued manufacturer.
Delete a	Note: The following steps will uninstall the selected item.
manufacturer or catalog	1. Select the manufacturer or catalog.
5	
	2. Click — to remove the selected
	manufacturer or catalog.
Change the	1. Select the manufacturer and catalog.
location of a	2. Under <b>Content Properties</b> click the <b>Browse</b>
catalog, its	icon beside Catalog, Graphics or Database.
its database	
Change the	1. Select the manufacturer and the catalog.
zones	2. Select the <b>default prize zone</b> .

	Note: Steelcase and Kimball users can select specific price zones for old price lists.
Hide disabled manufacturers and catalogs	Check <b>Hide disabled manufacturers and catalog in listings</b> . When you restart 2020 Worksheet, the catalogs and manufacturers you disabled will not be listed in the <b>Content</b> tab.

# Folders and files preferences

Use **Folders and Files** preferences to select the folders where documents are stored. In most cases you will **not** need to edit these locations because defaults are set during installation.

1. From the **Tools** menu select **Preferences**.

#### 2. Click Folders + Files.



3. Change any of the following settings by clicking the Browse button beside it. Then, click **OK** to save and close. Or, click **Apply** to save and keep the **Preferences** dialog box open.

Setting	Description		
Local Projects	These are folders that appear in the <u>Projects</u> tab of the <u>Explorer pane</u> . This is the primary search folder for opening and saving worksheets. Select the folder where projects will be stored on the local PC.		
Network Projects	These are folders that appear in the Explorer bar's Projects tab. Select the folder where projects will be stored on the network.		
Export files	Select the folder where <u>export files</u> will be stored. Can be on the local PC or on the network.		
Worksheet templates	Select the folder where <u>worksheet templates</u> will be stored. Can be on the local PC or on the network.		
Sort Settings	Select the folder where Sort Settings will be stored. The folder can be on the local machine or on the network.		
CoverPage layouts	Select the folder where <u>cover page</u> templates will be stored. Can be on the local PC or on the network.		
Report designs	Select the folder where <u>report designs</u> will be stored. Can be on the local PC or on the network.		
Explorer bookmarks	Select the folder where <u>bookmarks</u> will be saved. This folder should be on the local PC.		

QuickSearch index	Select the location of the index accessed by <u>QuickSearch</u> in Explorer and Worksheet.
Search keyword index	Select the location of the index accessed by <u>Search</u> in Explorer and Worksheet.
Contacts database	Select the location of the <u>Contacts</u> database.
Default Options file	Select the location of the <u>default options</u> file.

# **User preferences**

Set the **User** preferences to choose the current user and logo.

1. From the **Tools** menu select **Preferences**.

2. Click User.

		Preferences	×
General Bisplay Common Signal Common	Current User	Select which user in your Contacts represents the Prepared By user or company. This information can be displayed on a Cover Page, Report, or a worksheet's Header/Footer.	
QuickSearch Specification Content Content Content Contert Usualization Usualization Usualization Usualization Usualization Usualization Usualization Usualization Usualization Usualization	Logo Browse Clear	Select an image to represent the Prepared By user or company. This image can be displayed on a Cover Page or Report.	
		OK Cancel Apply Hel	p

3. Click the button under **Current User**.

This is a shortcut to the **Prepared By** field in the Worksheet Properties <u>General</u> tab.

Change your information in <u>Contacts</u>, then click **Set Default**. The record you set as default appears as the **Current User**. This information can be used on a <u>cover page</u>, <u>report</u> or printed worksheet's <u>header/footer</u>.

1. Click **Browse...** to select the default image to represent the **Current User**. This logo can be used on a cover page or report.



2. Click **OK** to save and close.

Or, click **Apply** to save and keep the **Preferences** dialog box open.

# **Manufacturer catalogs**

Manufacturer catalogs are installed with the 2020 Worksheet application.

For information about custom catalogs, see the <u>Custom catalogs</u> section.

### See:

- Navigate catalogs
- Catalog Properties

### Navigate catalogs

- 1. From the <u>Content tab</u> or the Explorer pane, select a manufacturer.
- 2. Click on the catalog you want to view.
- 3. Click on a section. Continue selecting sections until you get to the desired product number.

To drag and drop products from the Explorer bar to the worksheet, see <u>Add products using drag and</u> <u>drop</u>.

To move around in Explorer use the three navigational features: up one level, **Home**, and the drop down arrow. These help you move quickly to a section within the **Content** tab.



Notes: To save time, you can <u>bookmark</u> manufacturers, catalogs, sections or products you use frequently. You can display the Content in tree view instead of list view if you prefer. See <u>Explorer</u> <u>preferences</u> for details.

# **Catalog Properties**

Right-click on a section or product of a manufacturer catalog in the <u>Content tab</u> of the <u>Explorer pane</u> and select **Properties**.

atalog Properti	es				-X
1 Catalog 🕴	Visualization				
	EXHB Executive Hig \$760.00	h-Back Chair			
Type:	Product				
Link:	ca\default	.htm?SRC='CAT'8	&PUB='CAP'&MFG=	='EXP'&CAT='EX	P'&CATID='1439'
Mfg:	EXP - 20-20 E	Example Catalog			-22
Catalog:	EXP - 20-20 E	xample Office Fu	urniture		
Catalog Path:	C:\ProgramD	ata\CAP\Content	EVEXPVEXP.CAT		
Last Modified:	6/24/2008	3:36:02 PM	Last Accessed:	8/13/2013	11:20:59 AM
Send To	3 Specify				
				Close	Help

If you navigated down to a product, a preview of the product may be available when you click on the **Visualization** tab.

Catalog Proper	ties
	Auto   🚰 🗟 🎓   💽 🗣 🕲   💽
	Close Help

From the Catalog Properties window (Catalog tab) you can:

- Preview a product
- Send an item to a drawing
- Send an item to a worksheet
- Add an item to a custom catalog
- Specify an item using 2020 Options

# Use multiple versions of the same catalog

CAP Designer and 2020 Worksheet allow you to use multiple versions of the same catalog. This allows you to create worksheets using the current catalog and others using older catalogs. You can even put products from different versions of the catalog in one worksheet.

- 1. **Before** installing updated catalogs, copy the MFG folder that is to be archived, giving it a unique name at the same time.
- 2. From the Tools menu select Preferences.
- 3. Click Content.
- 4. Beside Select which manufacturers will be available, click
- 5. Enter a unique 3-character code for the manufacturer.

Enter Text		×
Please enter a	unique 3 character code for th	is manufacturer.
Manufacturer Code:	MIS	
	OK	Cancel

6. Enter the manufacturer name.

The name will default to the MFG code that was just entered. You can leave this name or type a more detailed name. The value entered in this field will be displayed in the worksheet to indicate if an item is from an archived catalog or from a standard, up-to-date catalog, so be sure to provide a name that will be understood and consistent.

Enter Text	×
Pleas	se enter a name for this manufacturer.
Manufacturer Name:	MIS-09-2013-DETAILED
1 <del>1.</del>	OK Cancel

7. Now you have to associate a specific folder with the "new manufacturer". Select the folder you created in step 1.

Þ	Adobe	-
Þ	🏭 Apple	
D	Apple Computer	-
Þ	ATI	E
Þ	Autodesk 🔋	
4	CAP	
	De Content	
	퉬 CoverPages	
	Logs	
	\mu Repository	

In the image above, the copied folder is located next to the other data, in the local Content folder. This is not a requirement. The archived data can be stored at any location accessible to the computer (other local folder, network, etc.).

8. With the newly added manufacturer folder selected in the upper section, under

Select which content will be available, click

- 9. Select one or more catalogs (files with .CAT extension) then click **Open**.
- 10. Click **OK** to apply the changes and close the **Preferences** dialog.
- 11. Click **OK** when the two information boxes appear.

Note that adding catalogs triggers a rebuild of the **QuickSearch** index.

12. For the changes to take effect, exit then reopen 2020 Worksheet.

Notice that the manufacturer you just added is now visible in the **Explorer** bar. It will be located at the bottom of the list.

You can move it up by going into **Preferences**, <u>**Content</u>** then using the **button**.</u>

Note: See <u>Add products from an archived catalog</u> to insert products from this archived catalog to the worksheet.

# **Bookmarks**

Bookmarks are a convenient way of returning to selected manufacturers, catalogs, sections, or products that you use frequently. You can also create bookmarks for worksheets or drawings you use often.

You can access bookmarks from 2020 Worksheet and CAP Designer.

1. In the <u>Content tab</u> of <u>Explorer</u>, right-click the manufacturer, catalog, section or product number that you want to bookmark.

Note that you can also use the <u>Projects</u>, <u>Search</u> or <u>Bookmarks</u> tab to create a bookmark.

2. Click the Add Bookmark icon beside the Home icon.



3. The bookmark name defaults to the name of the manufacturer, catalog, section or part number you have selected. You can change this to another name.

Note: The name you use cannot consist of any of the following characters: ", ', /, , |, ?, \*, :, <, or >.

4. Click **OK** to save the name.

5. To use the bookmark, click and hold the **Bookmark** icon and select the bookmark.



By default, content (manufacturers, catalogs, sections, or products) bookmarks are saved under the Content folder. Drawing bookmarks are saved under the Projects folder. Worksheet bookmarks are saved under the Worksheets folder.

See Organize bookmarks to organize bookmark folders and contents.

Note: You can also access and organize bookmarks from the **Bookmarks**, **Projects** or **Search** tab.

If you bookmark a product or level (section) and that product or level has changed position after a <u>catalog update</u>, the bookmark will no longer work.

## **Organize bookmarks**

Organizing <u>bookmarks</u> is similar to keeping a "Favorites" folder of frequently visited sites in a web browser. Bookmarks are saved on your computer. To see where they are stored on your computer, see <u>Folders and files preferences</u>.

By default, content (manufacturers, catalogs, sections, or products) bookmarks are saved under the **Content** folder. Drawing bookmarks are saved in the **Projects** folder. Worksheet bookmarks are saved under the **Worksheets** folder.

You can create and rename folders so you organize bookmarks by project or location.

1. In the <u>Content tab</u> of <u>Explorer</u>, right-click the manufacturer, catalog, section or product number that you want to bookmark.

Note that you can also use the <u>Projects</u>, <u>Search</u> or <u>Bookmarks</u> tab to create a bookmark.

2. Click and hold the arrow beside the **Add Bookmark** icon then select **Organize Bookmarks**.

<b>→</b> ⊕ ×
• t 🖾 💏 •
D Organize Bookmarks
36 H top cap

3. In the **Organize Favorites** dialog box, click on a folder and you will see a list of the bookmarks it contains.

Organize Favorites	×
Bookmarks as of 09-2013 BM bridge RBB2442	
New folder Favorites Folder Modified: 9/17/2013 11:24 AM	
New Folder Move Rename Delete.	
Close	

- 4. Do any of the following to organize bookmarks:
  - Click New Folder to create a new Bookmarks folder.
  - Drag and drop bookmarks into a folder, or from one folder to another.
  - **Rename** or **Delete** a bookmarks folder.
  - Highlight an item, then click Move. In the Browse For Folder dialog box, navigate to a folder to hold the bookmark.

# Enter and edit items in a worksheet

This section explains how to enter and edit items in a worksheet. This includes adding products from manufacturer catalogs, searching for products, selecting items, etc.

#### Refer to the following topics:

- Add products using drag and drop
- Add products using Insert
- Add products from an archived catalog
- Add service parts
- Select or make an item current
- Edit commands
- Go to a specific line and column
- Go to an item's location in Explorer
- Add or edit an annotation for an item
- Sort records by column
- Attributes
- Custom items (Specials)

- Item properties
- Copy values from one column to another
- Quickly fill in cell values (Assign)
- Copy options and attributes (Block Assign)
- Consolidate identical items
- Split an item
- Update items
- Flag and lock lines
- Color lines
- Send an item

# Add products using drag and drop

From **any tab** of the Explorer bar, you can drag and drop products to your worksheet.

To drag and drop products from the <u>Content tab</u>:

1. <u>Navigate your way down to a part number</u> used in a specification.

Or, use <u>QuickSearch</u> or <u>Search</u> to find a product.

2. Once you have navigated to an item you wish to specify, select the part number by holding down the left mouse button.

If available, a preview image is displayed in the <u>Preview bar</u>. Use any of the Preview toolbar buttons to zoom, rotate or change the image type.

3. While holding down the left mouse button, drag that item over to the right and release the button when you are over your worksheet.



#### See also:

- Add products using Insert
- Bookmarks

Note: If you click on a product instead of dragging and dropping it, you will see the <u>2020 Options</u> dialog.

If you see product with a note icon , you can view the note by clicking on the name. The **Note** is in the bottom part of the 2020 Options dialog. Click **Cancel** after reading the note.

If you see a product with a service parts icon  $\overset{\text{result}}{\sim}$ , you can add service parts to the worksheet. See <u>Add</u> service parts.

# Add products using Insert

If you have a product list, it may be faster to use the **Insert Product** command instead of <u>dragging and</u> <u>dropping</u> products from the <u>Explorer bar</u>.

- 1. Click on the <u>Item toolbar</u> then select **Product**.
- 2. Insert as many blank items as needed.

Note: You can press CTRL+SHIFT+P on your keyboard to quickly insert a product line.

3. Click in the Part Number column for item #1 and begin to enter the Part Number.

<u>Quick Search</u> will provide a list of possible part numbers in all available catalogs when the number of matches are under 50 (by default).

4. Double-click on the desired part number to fill in the information.

#### See also Bookmarks

Note: If you want to see preview images for items, run the Update Preview Images command.

### Add products from an archived catalog

The steps for adding products from an archived catalog are the same as adding from the current catalog. See <u>Use multiple versions of the same catalog</u> for instructions on archiving a catalog.

- 1. Add the product from the archived catalog. You can <u>drag and drop</u> from the Explorer bar or use <u>Insert</u>.
- 2. <u>Display</u> the Alt MFG column.

Notice that the MFG code appears as though the item came from the actual manufacturer. In the example shown below, an item brought in has the original MFG code of AIS. The MFG code of the archived catalog is displayed in the Alt MFG column. This is how you can differentiate the archived catalog from the current one.

📄 Worl	Untitle ksheet	d1.sp4	l (mo	dified)	~		
Item	1	8	1	Mfg	Alt Mfg	Cat	Part Number
[1]				AIS	Al2	A02	P-HEFR3912

The Alt MFG value is important because it is used when doing an <u>Update against</u> <u>catalog</u>. Worksheet will check this field first. If there is no value, it will check MFG, then CAT.

You can change the Alt MFG value of items that are already in the worksheet by

manually typing in the Alt MFG value, using <u>Assign</u>, or <u>Block Assign</u>. For example, if you inserted an item from the current catalog but you want an archived catalog's pricing, simply change the Alt MFG of this item to the archived catalog's MFG code. Then do an Update against catalog.

As another example, if you inserted an item from the archived catalog but want to get pricing from the current catalog, simply delete the value in the Alt MFG column then do an Update against catalog.

Note: If you set the Alt MFG to an invalid one, the item gets <u>flagged</u> and a question mark is displayed in the **Complete** column.

### **Add service parts**

You can add service parts from Kimball or National through the <u>Worksheet area</u> or from the <u>Content</u> <u>tab</u> of <u>Explorer bar</u>.

From the Content tab:

1. <u>Navigate your way down to a part number</u> used in a specification. Or, use <u>QuickSearch</u> or <u>Search</u> to find a product.

2. Click the **Service Parts** icon next to the product name.



3. Resize the 2020 Service Parts dialog to better view its contents.

The service part numbers are listed on the left side, while an illustration on the right side shows where the service parts are located.

ase l	Model	: 22K3060DDFLV	K K	mball <sup>®</sup> Office
Callo	ut Qt	Part Nbr Detai	Is Description	
	1	<u>1885944</u>	PREVAIL, 30WX26H, MODESTY PANEL	
1	2	<u>1885933</u>	PREVAIL, DRAWER ASSEMBLY, BOX	
э	3	1885931	PREVAIL, DRAWER ASSEMBLY, FILE	A S S S
c	1	<u>1885932</u>	PREVAIL, DRAWER FRONT SET, BOX/BOX/FILE	
þ	1	<u>1885930</u>	PREVAIL, DRAWER FRONT SET, FILE/FILE, RIGHT	
	2	1519595 🤳	DRAWER SLIDE SET, BOX	
2	3	<u>1519443</u> 👌	DRAWER SLIDE SET,BOX/FILE	
3	3	1656759	FILE ROD .75 X 11.783	
H.	4	1544944	CUP HNG SC 110 BK	
	4	1475356	HNG MTG PLT BK 5MM	
J	4	1885937	HINGE ASSEMBLY	
lecte	d Servi	ce Parts		Terms and Conditions
				X Benove the right to change prices
				without prior notice. Delive
				Gear List for details.
				Details

4. Click on a service part number to add it to the **Selected Service Parts** list.

If you see a **Note** icon <sup>4</sup>/<sub>2</sub> next to the part number, you can click on it to read any notes about that part.

5. Add other parts if necessary. If you want to remove a selected service part, select it then click **Remove**.

To clear the list, click **Clear List**.

1885933	PREVAIL, DRAWER ASSEMBLY, BOX	K Remov
] 1885931	PREVAIL, DRAWER ASSEMBLY, FILE	Clear L
] 1885932	PREVAIL, DRAWER FRONT SET, BOX/BOX/FILE	
] 1885930	PREVAIL, DRAWER FRONT SET, FILE/FILE, RIGHT	

- 6. By default, items sent to worksheets will be <u>flagged</u>. If you do not want them to be flagged clear the checkmark beside **Flag items sent to worksheets**.
- 7. When done, click **Send To**, **Worksheets**, then select the worksheet.

The service parts are added to the worksheet.

Wor	rksheet	t				*	Level
Item	-	8	1	Mfg	Cat	Part Number	Part Description
•		<mark>8</mark> \$		KIM	KSP	1885933	PREVAIL, DRAWER ASSEMBLY, BOX
2	-	85	1	KIM	KSP	1885931	PREVAIL, DRAWER ASSEMBLY, FILE
	-	<del>8</del> \$		KIM	KSP	1885932	PREVAIL, DRAWER FRONT SET, BOX/BOX/FILE
						***	Skipped Option Skipped Option Skipped Option
2	-	<mark>8</mark> \$		KIM	KSP	1885930	PREVAIL, DRAWER FRONT SET, FILE/FILE, RIGHT
						***	Skipped Option Skipped Option Skipped Option

These items are automatically price locked (notice the **Price Lock** icon <sup>3</sup> under the **Lock** column) to prevent changes to the price. For no charge items, use the **Item** menu to <u>delete pricing</u>.

From the Worksheet area:

- 1. <u>Select</u> or make the line item <u>current</u>.
- 2. From the Item menu, choose Select Service Parts.
- 3. Follow steps 3 to 6 above.

# Select or make an item current

On a worksheet you will have a number of items. You can edit these items, add finishes and discounts to them, cut, copy, paste, and send them to another worksheet, etc.

How does the program know when performing functions such as paste, where to paste the item on the worksheet? Here we will discuss the difference between items that are <u>current</u> and items that are <u>selected</u>.

When performing <u>edit commands</u>, if there are no selected items, Worksheet will perform the function on the current item. If there is both a current item and a selected item, the selected item will always take precedence over a current item. For example with one item current and one selected, the <u>cut</u> command will cut the selected line item.

-		Cur	rent Item	Skipped Option Skipped Option						
<b>[3]</b>	TC	SCA	MPTAM6542P3	PANEL-TACK ACOUST,3 CIRCT,ME CAP,42-5/16X64-11/16	D TOP	1	\$	857.00	5	857.00
			111 103 111	Skipped Option Skipped Option Skipped Option Skipped Option						
4	STC	SCA	MU2824BBFL	PEDESTAL-FIXED,2 BOX/1 FILE DWR,UK,AVENIR PULL,23-1/2D		1	5	548.00	\$	548.00
			644 144	Skipped Option Skipped Option						
			ta a c	Skipped Option Sel Skipped Option	lected Ite	m.				
			101	Skipped Option						
5	STC	SCA	MUCC2222	WORKSURFACE-CORNER,CURVE 24X24X42X42	D,	1	\$	368.00	\$	368.00
			PLASTIC	*EDGE PLASTIC Skipped Option Skipped Option						

See also Special selection tools

## **Current item**

It is necessary to have a current item for a number of reasons. The current item is the priority item on the worksheet. When specifying options from a worksheet the current item is the starting point.

Note: When you insert or paste items, these items will be inserted **above your current item**. If there is no current item, the Insert or Paste command will insert an item at the **end of the worksheet**.

To make an item current:

Click in any cell except the **Item** column. You will see brackets around the item number. You can only have one current item at a time.

📓 Worksheet 👻										
Item	Mfg	Cat	Part Number #	Part Description	Oty	Qty List		Ext List		
1	STC	SCA	MBBL4216	BIN-STORAGE,LK,15-5/8X41-3/4X 17-1/8	1	5	506.00	\$	506.00	
_			010 010 010	Skipped Option Skipped Option Skipped Option Skipped Option						
[2]	TC	SCA	MPTAM6524P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,24-5/16/64-11/16	1	\$	722.00	\$	722.00	
			844. 944. 944.	Skipped Option Skipped Option Skipped Option Skipped Option						
3	STC	SCA	MPTAM6542P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,42-5/16/84-11/16	1	\$	857.00	\$	857.00	

To clear the current item:

#### Click on the Item column heading.

Worlsheet 🗠								
Item	Mfg	Cat	Part Number &	Part Description				
-	STC	SCA	MBBL4216	BIN-STORAGE,LK,15-5/8X41-3				
				Skipped Option Skipped Option Skipped Option Skipped Option				
[2]	STC	SCA	MPTAM6524P3	PANEL-TACK ACOUST,3 CIRC CAP,24-5/16/64-11/16				
				Skipped Option				
				Skipped Option Skipped Option Skipped Option				
3	STC	SCA	MPTAM6542P3	PANEL-TACK ACOUST,3 CIRC CAP,42-5/16/84-11/16				
				Skipped Option Skipped Option Skipped Option				

### See also:

- Select items
- Special selection tools

# **Select items**

Selecting items is a way to make a subset of your worksheet. You can cut, copy, paste, update against catalog, apply a discount, send to, and use the find and replace features on your selected set of items. Selected items are highlighted across the entire row.

#### To select an item:

Click on the **Item** number. In the example below, the item was selected by clicking on the number **1** in the **Item** column.

📄 Wor	kshee	t : Tes	t associ	ated w	orksheet 🔻	•				
Item	-	8	1	ø	Previe	Mfg	Cat	Part Number	Special	Part Description
1	-			ø		EXP	EXP	EXHB		Executive High-Back Chair
-								005 		Stone Gray Skipped Option
2	0			ø						
3	-					DMO	DMO	CE66		End Panel Connector, 66H
										Skipped Option Skipped Option Skipped Option
[4]	-					DMO	DMO	CE66		End Panel Connector, 66H

You may select more than one item by holding down the SHIFT (to select adjacent items) or CTRL (to select non-adjacent items) key on your keyboard while clicking the item numbers.

To select all the items in your worksheet, from the Edit menu, choose Select All.

To clear selected items, press the ESC key.

To select items that were not selected AND clear selected items, from the **Edit** menu, choose **Invert Selection**.

### See also:

- Current item
- Special selection tools

# **Special selection tools**

There are other ways to select items besides <u>clicking the **Item**</u> column.

You can also:

- Select flagged, locked, complete or incomplete items
- Select by criteria

These tools are very helpful when working on large files or worksheets with Alias values assigned.

### Select flagged, locked, complete or incomplete items

Example - select flagged items:

- 1. Flag all the panels in the worksheet.
- 2. To quickly select all flagged items, from the menu choose Edit, Select, Flagged.

The flagged items are now selected.

The same procedure can be done for <u>Locked</u> or <u>Complete/Incomplete</u> items.

#### See also:

- Select items
- Select by criteria

### Select by Criteria

For large files it may be faster to use **Select by Criteria** to make a selection set.

Example - select items by catalog code:

- 1. From the Edit menu choose Select by Criteria.
- 2. In the **Select by Criteria** dialog, check the **Cat** column, leave the **Operator** as equals and type in the catalog code of products you want selected.
- 3. Click **OK**. All the line items from that Catalog will be selected.

Use **Select by Criteria** using columns like **Alias, Department, Floor** or **Tag** for optioning, printing or sending to another worksheet.

For example, to print only items from the Sales Department, check **Department**, set **Operator** to **equals** then type in **Sales** under **Value**, then <u>print</u> only selected items.

Note: You can specify more than one criteria. By default, only items that match **all** the specified criteria will be selected. If you want to select items that match **any** of the specified criteria, check the option under **Match Options**.

### **Edit commands**

This section explains the various tasks you can perform to alter you worksheet. These include copying and pasting items, deleting items, undoing an action, etc.

See:

- Cut, copy and paste an item
- Delete an item
- Move an item
- Undo an action
- Redo an action

Cut, copy and paste an item

To cut or copy an item:

1. <u>Select an item</u> or make an item <u>current</u>.

If there is both a current item and a selected item in the worksheet, the selected item will be cut/copied to the clipboard.

2. Right-click and select Cut Item(s) or Copy Item(s).

To paste an item:

1. <u>Make a line current</u> so that the item will be pasted on this line.

If you want the item to be pasted at the end of the worksheet, clear the current item by pressing  ${\ensuremath{\tt ESC}}$  .

2. Right-click and select Paste Item(s).

### **Delete an item**

In Worksheet you can delete the current or selected item. This item could be a product, <u>option</u>, <u>attribute</u>, <u>worksheet link</u>, <u>standard</u>, <u>outline level</u>, <u>subtotal</u>, or <u>price adjustment</u>.

In addition, you can also delete:

- both the options and attribute lines in the current item
- the pricing information in the current item
- all <u>subtotal</u> lines in the worksheet

To delete an item:

1. <u>Select an item</u> or make an item <u>current</u>.

If there is both a current item and a selected item in the worksheet, the selected item will be deleted.

- 2. Right-click and select Delete.
- 3. Choose any of the following:

Command	То
Current Item (or Selected Item)	Delete the current or selected item(s).
Options + Attributes	Delete option and attribute lines from the current or selected item(s)
Pricing	Worksheet does not show a confirmation message before deleting pricing information. This deletes prices from the current or selected item(s).
All Subtotals



Worksheet does not show a confirmation message before deleting all subtotals.

This deletes all subtotal lines in the worksheet.

4. Click Yes if you see a Confirmation message.

Note: A guick way to delete the item is to press CTRL+SHIFT+DELETE.

## Move an item

You can move the current item up, down, to the top or to the bottom of the worksheet.

From the Item menu, select Move, then choose the appropriate action.

## Undo an action

To undo the last action:



To undo more than one action:

1. Click the arrow next to the Undo icon in the Standard toolbar to see a list of the most recent actions you can undo.



2. Click the action you want to undo. If you don't see the action, scroll through the list.

When you undo an action, you also undo all actions above it in the list. Also, if you later decide you didn't want to undo an action, click

### **Redo an action**

To redo the last action:

Click <sup>Cl</sup> on the <u>Standard toolbar</u>.

To redo more than one action:

1. Click the arrow next to the **Redo** icon in the <u>Standard toolbar</u> to see a list of the most recent actions you can redo.



2. Click the action you want to redo. If you don't see the action, scroll through the list.

When you redo an action, you also redo all actions above it in the list. Also, if you later decide you didn't want to redo an action, click

# Go to a specific line and column

If you have several lines in your worksheet and want to go to a specific line and column, use the **Go To** command.

- 1. From the Edit menu, select Go To.
- 2. Under Item Number, enter the line number you want to go to.
- 3. Under Select Column, select the column you want to go to.
- 4. Click **OK**.

## Go to an item's location in Explorer

- 1. Make the item <u>current</u> in the worksheet.
- 2. Right-click and select **Explore** to go to the product's location in the Content tab.

The item is then highlighted in the **Content** tab of **Explorer**.

## Add or edit an annotation for an item

To enter or edit a note on an item, click in the Annotation column and then write or edit a note.



lit A	nnotation							×
1b	Tahoma	- 1	0 🔻 Color	• B	<i>I</i> <u>U</u>	DZ∃		
(	Clear						ОК	Cancel

## Sort records by column

Lines on your worksheet can be sorted by one column or by multiple columns.

#### To sort by one column:

- 1. Click the column heading, for example, **Part Number**.
- 2. You will be prompted to confirm the sort so you don't sort your worksheet accidentally, since sorting will remove any <u>subtotals</u> in the worksheet. Click **Yes**.

This will sort your worksheet by number (1-9) then letter (A-Z).

A second click will reverse the sort by letter (Z-A) then by number (9-1). You will notice an arrow next to the column heading, indicating that records are sorted by this column.

1044	6	>
Cat	Part Number 3	
cs	475485M	PLSTC
CS	LEAPV2	462 CH

See also:

- Sort by multiple columns
- Save Sort Settings

Note: You can also sort your worksheet by right-clicking any column header, selecting **Sort** then the column name.

## Sort by multiple columns

- 1. Click  $2^{\downarrow}$  on the <u>Worksheet toolbar</u>.
- 2. In the **Multiple Column Sort dialog**, select the checkboxes beside the columns you want to sort by. You can also **Select All** or **Clear All** of the columns. Only columns that are displayed in the worksheet are available.

	Multipl	e Coli	umn Sc	ort			×		
Column Name				^	S	elect All			
Part Number							_		
Part Description	ı				C	lear All			
Category					Ŧ	Top			
Floor					,	төр			
Department					+	Move U	b		
Person					-		٢		
Qty					÷	Move D	own		
List									
Sell					£	Bottom			
Ascending (09, WARNING: E	A2) Existing sub	totals w	ending (9 ill be rem	0, ovec	ZA) d by th	ne sort			
✓ Insert Subtotals (the first checked)	after each d field in th	unique e list)	value of t	he p	orimary	y sort fiel	d		
Subtotal by Area Tag (primary sort field must be Alias1, Alias2, or Alias3 and contain valid Area Tags)									
Load	Save		Ok	(		Cance	!		

3. By highlighting a column name (such as **Part Number**) and using the Move Up, Move Down, Top or Bottom arrows, move the column up or down in the sorting order.

This will adjust the rank or order of your sort. The first column checked will be used as the primary sort field.

4. Choose either sort order:

Ascending - sorting from 0 to 9, then A to Z

Descending - sorting from Z to A, 9 to 0

- 5. If you want to **Insert** <u>subtotals</u> after each unique value of the primary sort field, check the box.
- 6. Click **OK** to execute the sort.

## **Attributes**

You can add Attribute lines to line items and use them as a tag field or a place to enter specific information about that item. Attribute information is generally used for notes or information that is not in the catalog. Text entered in the **Attribute** field is not affected by <u>Update Against Catalog</u>. Attribute lines can also be displayed or hidden in a worksheet.

- 1. Make a product line <u>current</u> in a worksheet.
- 2. Click Insert on the <u>Item toolbar</u> then select **Attribute**.
- 3. A yellow line will appear below the options.

Type in information such as a specific note about that item.

I		1					
[4]	STC	SCA	MPTAM6524P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,24-5/16/64-11/16	1	\$ 754.00	\$ 754.00
			STD PNT 4773 ABT FACE Y152 ABT FACE Y152 ***	*BASIC:STANDARD PAINT BALTIC (TRANS) *SURF-1:ABOUT FACE AQUA *SURF-2:ABOUT FACE AQUA			
1			IGM	First Floor			
5	STC	SCA	MPTAM6542P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP. 42-5/16x64-11/16	1	\$ 889.00	\$ 889.00

To display or hide Attribute lines, click the Rows dropdown in the <u>View toolbar</u> and select **Attributes**.

Rows 🕨	8	Products	Ctrl+Alt+P
Columns •	<b>()</b>	Options	Ctrl+Alt+O
Levels •	8	Attributes	Ctrl+Alt+A
Templates •	8	Standards	Ctrl+Alt+S
ha i i 🗇 i i 🗇 i i i	8	Outline Levels	Ctrl+Alt+T
Projects Search Bookmarks	80	Worksheet Links	Ctrl+Alt+L
<b>▼</b> 무	3	Price Adjustments	Ctrl+Alt+J
🎓 🗎 🗑 😭 🕒		Subtotals	Ctrl+Alt+U
	~	Grand Total	Ctrl+Alt+G

#### See also:

- Search for an attribute line
- Delete an item
- Show or hide rows
- Copy options and attributes (Block Assign)

Note: Steelcase uses the Attribute field for specific tagging. See Manufacturer-specific information

Search for an attribute line

- 1. Click M on the <u>Standard toolbar</u>.
- 2. Check Advanced.
- 3. Under Item Detail Search Criteria, click under Type then select Attribute.
- 4. Type in the number and/or description.

Column	Operator	Value					
Complete	equals	Complete		Select All			
Lock	equals	Locked		Cancel			
Flag	equals	on		Cancer			
Annotation	equals		E	Advanced			
Mfg	equals			Advanced			
Cat	equals			Clear curre			
Part Number	equals			selection			
Special	equals						
Part Description	equals						
Category	equals		+				
m Detail Search Crit <b>Type</b>	teria: Number	Description		Add			
ttribuite				Remove			
Attribute							

5. Click Find Next.

# **Custom items (Specials)**

You can create custom items if a product is not found in a catalog, or if a standard product needs to be adjusted in some way.

See:

- Change an existing part into a custom item
- Add an item that is not found in a catalog
- For Steelcase users, see Convert to Steelcase Special in the 2020 Worksheet Manufacturer Specific Information help.
- For Haworth users, see Haworth Specials in the 2020 Worksheet Manufacturer Specific Information help.

Change an existing part into a custom item

1. <u>Customize your columns</u> in order to display the **Special** column. It is recommended to move it next to the **Cat** column.

📄 Woi	rksheet					-			
ltem	Preview	1	8	1	Mfg	Cat	Special	Part Number	Part Description
1					EXP	EXP	Γ	PBF1230	Monolithic Panel, 30H x 12W
									Skipped Option Skipped Option

- 2. Make an item current.
- 3. Change the product number, description and list price as needed.

- 4. Change the <u>options</u> once the item is defined as a special you won't be able to specify options.
- 5. Check the box under **Special**. This adds an asterisk to the **CAT** code.

📄 Wor	rksheet				-	-			
ltem	Preview	1	8	1	Mfg	Cat	Special	Part Number	Part Description
[1]	J	9			EXP	EXP*	ঘ	PBF1230	Monolithic Panel, 30H x 12W
								] 	Skipped Option Skipped Option

Note: This also works the other way — if you add an asterisk to the **CAT** code the **Special** box will be checked.

6. Once all changes are made, it is a good idea to <u>lock</u> the line item to protect it from any mistaken changes.

Because the **CAT** code has been changed, if you do an <u>Update Against Catalog</u> this line item will be ignored. Also, you cannot specify options for this custom item.

If you want to update this item against the catalog or specify it, you need to clear the **Special** box or remove the **CAT** code asterisk.

## Add an item that is not found in a catalog

Another method for creating a custom item is to add a blank line to the worksheet and type in the information you need:

- 1. Click Insert I on the Item toolbar then select **Product**.
- 2. Type the information about the special in the blank line.

Wor 📓	rksheet			4										Level.
Item	1	0	A Part Number	Mfg	Cat	Oty	Part Description	Li	st	Ext	List	Purc	hase	Ex •
	1		5907K-884	ALS	ALD	1	66X24 Dsk Shi Assy 25.5H b/p 29H n/i	\$	908.00	5	908.00	\$	908.00	
			.GR				6" from RS/4 1/4" from Rear							
			M				Metal Grommet							
			EL				CLR: Matte Silver							
			\$(MICA)				Mica Clr Opts							
			PR2				CLR: Platinum Metallic							
			LT3C				LAM: Gravel							
2]	20	8	SP-5910K-884	ALS	ALD*	1	40X24 DskK Shi Assy 25.5H b/p 29H n/i	\$	900.00	\$	900.00	\$	900.00	
			GL				6" from LS/4 1/4' from Rear							
			M				Metal Grommet							
			EL				CLR: Matte Silver							
			\$(MICA)				Mica Clr Opts							
			PR2				CLR: Platinum Metallic							
			.TM41				LAM: Beigestone							
	1		NR6842F	HON	HIN	1	Raceway Fabric Panel 68H 42W	\$	533.00	\$	533.00	\$	533.00	
			\$(M1)				GRADE: Fabric Grade M1							
			CT				FABRIC: Catalyst							
			20				COLOR: Gold							
-			1. 1.	-										

3. Once all changes are made, it is a good idea to <u>lock</u> the line item to protect it from any mistaken changes.

See also: Insert blank options and attributes.

Note: The icon in the line item's <u>Complete</u> column will indicate that it needs to be updated against the catalog. You will **not** want to do this because Worksheet will flag this item as unknown and you may no longer be able to find the item in the worksheet.

#### Insert blank options and attributes

You can add a blank <u>option</u> or attribute to a line item. The **Option** line is used for information from the manufacturer's catalog or information about finishes. The **Attribute** line is for additional information such as special installation instructions or notes.

To insert a blank attribute line, see Attributes.

#### To insert a blank option line:

- 1. Make the item <u>current</u>.
- 2. Click Insert i on the Item toolbar then select **Option**.

To delete option and/or attribute lines, see <u>Delete an item</u>.

## **Item properties**

Once you have added <u>options</u> or <u>discounted</u> your worksheet you can <u>display columns</u> with the pricing information or you can use the **Item Properties** of each individual line item.

To view an item's properties:

- 1. Right-click on an item then select **Properties**.
- 2. Click on any of the Item Properties tabs:

**Pricing:** view prices and quantities. **Discounts:** view discounts associated with an item. Click **Edit All** to edit discounts or **Remove** All to remove all discounts. **Details**: to see options applied to that line. Click **Specify** to change the options. Click **Step In** to step in the level, if the current item is a <u>Standard</u> or an <u>Outline level</u>. **Visualization**: change the image displayed in the **Preview** column. Change the preview image (see <u>Preview a product</u>) then click **Use this image for item preview**.

- 3. Click **Previous** or **Next** to view the properties of the previous or next item in the worksheet.
- 4. Click **Goto Item** to close the **Item Properties** dialog and make the item that was opened in **Item Properties** current.

See also Item Detail view

# Copy values from one column to another

Worksheet columns have certain information in them when you do a take off (create a worksheet) from a drawing. For example, the **Tag** column will have the symbol tags listed and you may have assigned an **Alias** value in the drawing. You may want to have the information that is in the **Alias** column in the **Tag** column.

Example - copy values from the Alias 1 column to the Tag column:

- 1. Make sure that the Alias 1 and Tag columns are visible on the worksheet.
- 2. Click in the Worksheet toolbar.
- 3. In the Column to Copy From box select Alias 1.
- 4. In the Column to Copy To box select Tag.
- If you want to keep the information in the Tag column and simply add the information from the Alias 1 column then check Append copied text to the current value.
- 6. If you want to **apply only to selected items** check the option.

- 7. If you want to **apply within all levels** (<u>standard</u> and <u>outline levels</u>) check the option.
- 8. Click **OK**.

# Quickly fill in cell values (Assign)

When the information of a column is the same for many line items, use the **Assign** feature to quickly fill in all the cells.

Example - assign values to the Alias 1 column:

- 1. <u>Turn on</u> the **Alias 1** column.
- 2. Click the **Assign** icon in the **Worksheet** toolbar.
- 3. Check Alias 1 and type Area A in the Assign Value column.

Column Heading	Ass	ign Value
Color		
Annotation		
Mfg		
Cat		
Part Number		
Special		
Part Description		
Category		
Alias 1	Area A	
Qty	0	
Option		
		Remove
	Ade	

- 4. If you want to Assign only to selected items check the option.
- 5. If you want to Assign within all levels (standards or outline levels) check the option.
- 6. Click OK.

Note: If you want to assign an **Attribute or Option** to lines click the **Option** drop-down.



# Copy options and attributes (Block Assign)

Block Assign will copy the <u>options</u> and/or <u>attributes</u> of one item to other items on your worksheet. It can be a great time saver if you have several similar items that all require the same finishes/attributes.

To add a block of options from one item to similar items on a worksheet.

- 1. Select (make current) the first item that you want to copy the finishes from.
- 2. Select the items you want to copy finishes to.
- 3. Click on the Worksheet toolbar.
- 4. Under **Assign**, leave both **Options** and **Attributes** checked. This will copy both the options and attributes.

ock Assign		<b>_</b>
Assign		
Options		
Attributes		
From Item		
2:		•
Tag: Part Descriptio	n:	
To Item		
Range:	start 1	end 222
Selected		
		Cancel

- 5. The **From Item field** should default to the current item number (the item that has the finishes you wish to copy).
- 6. Under **To Item**, click **Selected**.
- 7. Click **OK**.

The **From Item**'s options will overwrite the existing options on all the selected items. Be aware that you may accidentally apply options from a panel to a pedestal. The Attributes will be added to any other Attributes the items already have.

8. Now that the options have been assigned, do an <u>update against catalog</u>.

Note: Updating against the catalog is vital if you assign finishes from one item to another because these finishes may include a price up-charge that needs to be reflected in the total pricing. You should always update against the catalog after using Block Assign.

# **Consolidate identical items**

Consolidate combines identical line items into one line item and updates the quantity.

- 1. Click worksheet toolbar.
- 2. In the **Consolidate** dialog, select or clear the criteria will be used for the consolidation. For example, if you have different tags or discounts in the file clear those columns. The resulting value in the column will be the first value encountered in the worksheet.

Consolidate	×								
Consolidate will combine identical items in all levels. The items within Standards will not be consolidated. This will remove all subtotals from the worksheet.									
Consolidate Criteria:	_								
Color 🔨	Select All								
✓ Flag									
Annotation	Clear All								
✓ Mfg									
✓ Alt Mfg									
✓ Cat									
<ul> <li>Part Number</li> </ul>									
✓ Special									
Option Group									
Part Description									
Category									
Generic									
Finish Code									
Alias 1									
Lieft Almo 1									
Consolidate Edit Defaults Set Defaults	Cancel								

#### 3. Click Consolidate.

#### See also: Split an item

Note: Any items that are <u>optioned</u> or <u>discounted</u> differently will not consolidate unless the option or discount boxes are cleared.

Click **Edit Defaults** to change the default consolidate criteria. This is the same as clicking **Default Consolidate Criteria** in **Tools**, **Preferences**, <u>Common</u>.

Click Set Defaults to reapply the default criteria on the dialog box.

## Split an item

Split separates one line item into two identical items and updates the quantity. Instead of copying and pasting a line then changing the **Qty**, Split is a quicker way of accomplishing the same task.

1. Make the item <u>current</u>.

Before splitting an item, make sure its Qty is greater than 1.

ltem	$\checkmark$	8	∕♦	Mfg	Cat	Qty	Part Number
1	<b>~</b>			STC	CS1	1	940000100SR
[2]	<			STC	CS1	10	940000100SR
3	<b>~</b>			STC	CS1	1	940000100SR

- 2. From the Item menu, click Split.
- 3. Type the quantity for the **new** or **existing** line. The other quantity will be automatically updated. You can also use the buttons to change quantities.

Split Item		×
Part Number:	940	0001005R
Line number 2 items with the	will be spl following Ouantity	it into two quantities:
New	4	
Existing	6	~
ОК		Cancel

4. Click OK.

ltem	$\checkmark$	8	∕♦	Mfg	Cat	Qty	Part Number
1	<b>~</b>			STC	CS1	1	940000100SR
[2]	<			STC	CS1	4	940000100SR
3	<b>~</b>			STC	CS1	6	940000100SR
4	<			STC	CS1	1	940000100SR

See also Consolidate identical items

# **Update items**

Use:

- Update against a catalog to apply information such as pricing from the manufacturer catalog to your worksheet.
- Update against a worksheet to update finishes, tags and discount information using an existing worksheet.
- Update preview images to retrieve, change or reset the preview images of items in your worksheet

#### Update against a catalog

Updating against a catalog applies information from the manufacturer catalog to your worksheet. Catalog information includes data such as part numbers, part descriptions, list prices, weights and volumes. The **Update Against Catalog** will also allow you to update against different price zones.

Note: Whenever you see this icon in any of the cells under the <u>Complete column</u>, you will need to do an update against catalog.

- 1. If you want to update only certain items, select them first in the worksheet.
- 2. Click in the <u>Worksheet</u> toolbar.
- 3. Under **Update Settings** change any of the following:
  - price zone
  - update items within all levels (Standard or Outline)
  - update selected items only
  - flag items not found in catalogs
- 4. Click Update.

5. Once the process if finished, read the dialog box to see how many items were updated, then click **OK**.

Note: If you checked <u>Flag</u> items not found in catalogs, you can easily find items in your worksheet that were not found by the update. Check for typing errors and update again.

#### Update against a worksheet

Updating against a worksheet can save several steps. Where updating against the electronic catalog will bring in correct description and most recent pricing, updating against a worksheet will update finishes, tags and discounting from a pre-made worksheet. For projects that use the same furniture with the same finishes, it is a great time saver.

In the example below, you will update a new worksheet against another one to bring in options.

- 1. First, make sure to have a saved worksheet with products already <u>optioned</u>. This will be the "Master" worksheet. You will update another worksheet against this one.
- 2. Create a new worksheet.
- 3. Enter some part numbers that are also in the Master worksheet.
- 4. Click is on the <u>Worksheet toolbar</u>.
- Under Worksheet to Update Against, type the path and file name of the Master worksheet or click it to locate it.
- 6. Under Update By, leave the default setting (Product Number).

This will search for exact product numbers in the worksheet that you are updating against, and bring the remaining information for that particular item to your current worksheet.

- 7. Accept the defaults in the **Columns to Update** section. This will include all the information that we want brought into our current worksheet.
- 8. Under **Update Criteria**, leave the **Update options** checked so that the options will be updated.
- 9. Click **OK**.
- 10. Read the **Results** dialog box for information on updated items then click **OK**.
- 11. Do an <u>Update Against Catalog</u> to validate option selections and get current pricing.

Note: You can also use the Option Clipboard to copy options from an existing worksheet.

#### Update preview images

Use the Update Preview Images command to:

- Change the preview image of items on the worksheet
- Retrieve the preview image of items that have an empty Preview column this is the case when items were added to the worksheet from a takeoff from CAP Designer or by using the <u>Merge</u>, <u>Import</u> and <u>Send To</u> commands.
- Reset the preview image of items on the worksheet back to the default image, zoom magnification and rotation.

Note: If an item is locked, its preview image will not be updated.

If you have a <u>standard</u> or <u>outline level</u> in your worksheet, you need to use the **Step In** command to view its contents, then use the **Update Preview Images** command.

- 1. Click an the Worksheet toolbar.
- 2. Do any of the following in the **Refresh Preview Images** dialog:

То:	Do this:
	<ol> <li>If necessary, make changes to the preview image.</li> </ol>
Change the preview	See <u>Preview a product</u> for details on what you can do with preview images.
image of the displayed item	<ol> <li>Click Update This Image For Item Preview to change the preview image of the current item displayed.</li> </ol>
	3. Click <b>Next Item</b> to go to the next item.
	4. Click <b>Close</b> .
	<ol> <li>If you want to replace existing images with their default image, rotation and zoom magnification, check <b>Replace existing</b> images.</li> </ol>
Retrieve the preview image of items that have an empty	<ol><li>Click Update All to retrieve the preview image of items that do not have an image.</li></ol>
Preview column	This button changes to a <b>Stop</b> button during the update. Click <b>Stop</b> if you want to discontinue updating.
	3. Click <b>Close</b> .

	1. Check Replace existing images.
Reset the preview image of items on the	2. Click <b>Update All</b> .
worksheet back to the default image, zoom magnification and rotation	<ul><li>This button changes to a Stop button during the update. Click Stop if you want to discontinue updating.</li><li>Click Close.</li></ul>

# **Flag and lock lines**

You can lock lines so that they cannot be updated automatically (by functions such as <u>Global Options</u>) or manually.

You can also flag lines to mark them for a specific reason.

See:

- Flag lines
- Flag by criteria
- Lock lines
- Lock by criteria

### **Flag lines**

A line can be flagged automatically after <u>updating against a catalog</u> or <u>adding a service part</u>. You can also flag a line manually.

#### To flag one item:

Click in the **Flag** column.

ltem	1	8	1
1	1		
			Ň
			1

To flag several items:

Select the items then click <sup>2</sup> in the <u>Item toolbar</u>.

The **Toggle Flag** button will switch the flag status of either the current item or selected items. The fly out includes **Toggle Flag**, **Set Flag** and **Clear Flag** buttons.



The Flag status can also be controlled from the **Item** menu. From here you can also go to the previous or next flagged item, clear all flags or <u>flag by criteria</u>.

## Flag by criteria

If you have a large worksheet, instead of selecting items then flagging them, multiple items can be flagged by criteria.

In the example below we will flag items from a specific catalog:

- 1. From the Item menu select Flags, By Criteria.
- 2. Check the **Cat** column and set the value to equal a catalog code in your worksheet.

Items in the workshe	et will be flagged base	ed on the criteria belo	ow:
Match Options			
Elag items the	at match all criteria		
© Flag terno di			
Tiag items th	at match any criteria		
Column	Operator	Value	
Complete	equals	Complete	
Annotation	equals		
Mfg	equals		
Cat	equals	HAN	-
Part Number	equals		
Special	equals		
Part Description	equals		
Category	equals		
Alias 1	equals		
C Qty	equals	0	-
		_	

All the items from that catalog will be flagged. You can <u>select these flagged items</u> using the **Edit** menu.

#### Lock lines

A locked item is not affected by most commands and cannot be edited. Many toolbar buttons will be grayed out if the current item is locked.

If you lock a line then <u>export</u> the worksheet to SIF, the line is **not** included in the order. Also, a locked line is not optioned by <u>Global Options</u> or updated by an <u>Update against catalog</u>.

#### To lock one item:

Click in the Lock column.

8	1
8	1

#### To lock several items:

- 1. <u>Select</u> a few items in the worksheet.
- 2. Click an the <u>Item toolbar</u>. This will switch the lock status of either the current item or selected items.

The **Toggle Lock** button will switch the lock status of either the current item or selected items. The flyout includes **Toggle Flag**, **Lock** and **Unlock** buttons.



The Lock status can also be controlled from the **Item** menu. From here you can also go to the previous or next locked item, unlock all items or <u>lock by criteria</u>.

Note: A locked line <sup>6</sup> is not the same as an item with a price lock <sup>6</sup>. Items with price locks have the price columns locked, but you can still modify the other columns. See <u>Add service parts</u> for an example.

#### Lock by criteria

If you have a large worksheet, instead of selecting items then locking them, multiple items can be locked by criteria.

Example: lock all complete (all options have been specified) items.

1. From the Item menu select Lock, By Criteria.

2. Check the **Complete** column and set the value to equal **Complete**.

tems in the workshee	t will be locked based	d on the criteria below:	
Match Options			
Lock items that	t match all criteria		
I ock items the	t match any criteria		
	it match any criteria		
Coiumn	Operator	Value	
Complete	equals	Complete	
Flag	equals	on	
Annotation	equals		=
🥅 Mfg	equals		
📃 Cat	equals		
Part Number	equals		
Special	equals		
Part Description	equals		
	equals		
Category	equals		+
Category Alias 1	oquuis		
Category Alias 1	equuis	_	

# Send an item

You can send a worksheet item to:

- another worksheet
- a <u>drawing</u>
- a <u>custom catalog</u>

#### Send to a worksheet

You can copy items from one worksheet and send them to another worksheet.

- 1. <u>Select an item or make an item current in your worksheet.</u>
- 2. Right-click on the item then select Send To, Worksheets.
- 3. Select:

New - to send the item to a new Untitled worksheet Existing - to send the item to an existing worksheet that is not currently open <Worksheet name> - to send the item to an open worksheet

#### See also Send to a drawing

Note: If you right-click on a product in the <u>Explorer bar</u>, you can also access the **Send To** menu. For example, you can send items from your <u>Custom Catalog</u>.

You can also send items from the 2020 Options dialog.

#### Send to a drawing

You can send an item from a worksheet to an AutoCAD drawing. You can only send one item at a time to the drawing because you will be placing the symbol of that item.

- 1. Open the AutoCAD drawing. Make sure that CAP Designer has been loaded.
- 2. <u>Select an item</u> or make an item <u>current</u> in your worksheet.
- 3. Right-click on the item then select **Send To**, **Drawing**.
- 4. Go to the AutoCAD drawing.

Notice that the symbol is ready to be placed.

If there is no symbol referenced to the part, you will not be able to send it to a drawing.

5. Place the symbol in your drawing.

If the item is optioned it will be sent to the drawing with these options.

Note: If you right-click on a product in the <u>Explorer bar</u>, you can also access the **Send To** menu. For example, you can send items from your <u>Custom Catalog</u>.

You can also send items from the 2020 Options dialog.

# **Search for text or products**

The following topics show you the various ways you can search for text or products in 2020 Worksheet.

- Find text in a worksheet
- QuickSearch
- Search for products

## Find text in a worksheet

To find cells containing a search string:

- 1. Click M on the <u>Standard toolbar</u>.
- 2. Beside Find What, type the text you want to search for.

Note: If there is an item selected in the worksheet, the **Search Selected Cells** will be checked by default.

- 3. Select the **Direction** of the search: up or down.
- 4. Click Find Next.

Worksheet puts the cursor on the cell containing the text you entered.

5. To search for the same text again using the same search direction, press F3.

#### See also:

- Use Advanced Find to Select Items
- Find and replace an item

Note: To reuse a previous search string, use **Quick Find** on the <u>Standard toolbar</u> hao
. You can also search for a string by entering a value here.

#### **Use Advanced Find to select items**

When your worksheet is small it is easy to select the items you need for editing or updating. How can you quickly select a group of items if you have 70 line items on your worksheet?

Example: select panels in the worksheet

- 1. Make sure that you have at least one panel in your worksheet.
- 2. Click M on the <u>Standard toolbar</u>.
- 3. Check Advanced.
- 4. Check Part Description.

Note: If there is an item selected in the worksheet, the **Search Selected Items** will be checked by default. Make sure to clear this and any other check boxes from previous searches.

5. In the **Operator** column, change "equals" to "contains" by selecting it from the drop down.

6. In the **Value** column type Panel.

Complete Locked On Cancel	equals	Complete
Locked On Cancel Cancel Advanced	equals	
Advanced	oquaio	Lock
Advanced	equals	Flag
Advanced	n equals	Annotation
Clear curren	equals	Mfg
	equals	Cat
Panel selection	er contains	Part Number
	equais	Special
	ription equals	Part Description
	equals	Category
ber Description Add	arch Criteria:	em Detail Search Type
		Option
Remove		
	cted Items	Search Selecte
ber Description	arch Criteria: Number	em Detail Search Type Option

7. If there is anything else that all panels have in common select another search criteria.

For instance, if you want to select all panels with product numbers containing

"ABC...", check **Part Number**, change the **Operator** to "contains" and type ABC under **Value**.

8. Click Select All.

Note: You can also do the same thing using <u>Select by Criteria</u>.

#### Find and replace an item

**Find and Replace** will find a certain set of characters in a worksheet and replace it with another. This feature is useful if your customer wants to change one finish to another globally.

For instance, if the customer has decided to change all black trim to gray.

- 1. Click on the <u>Standard</u> toolbar.
- 2. In the **Find What** field, type the information that you want to replace.
- 3. In the **Replace With** field, type the information that will replace the **Find What** information.
- 4. In **Replace In Column**, select the column where values will be replaced.
- 5. In **Replace In Row**, change the value to the specific rows you are changing (for example, **Options**).
| Find What:       | Black        | -                 |
|------------------|--------------|-------------------|
| Replace With:    | Gray         | •                 |
| Replace In Colu  | mn:          | Replace In        |
| Part Description | n <b>•</b> ] | Ourrent Selection |
| Replace In Row   | :            | All Items         |
| Options          | •            |                   |

- 6. Under **Replace In**, select **All Items** or **Current Selection** (selected by default if there are selected items in the worksheet).
- 7. Click Replace to replace one occurrence or Replace All to replace all occurrences.

Remember: you must do an Update Against a Catalog to have the description and / or prices change.

Note: Highlight the information you want to replace before doing a **Find and Replace** so that the text is automatically entered in the **Find What** field. The correct column will also be set in the **Replace in Column**.

To run Find and Replace again, press F3.

# QuickSearch

The QuickSearch feature displays a list of possible matches as you type in a part number. This feature is available from the <u>Content</u> tab of the <u>Explorer pane</u> and from the <u>Part Number</u> field in the <u>worksheet</u> <u>area</u>.

See:

- Use QuickSearch from the Content tab
- Use QuickSearch from the Part Number field
- Filter QuickSearch

To change QuickSearch behavior, go to the **Tools** menu, select **Preferences**, and then click **QuickSearch**. For more information see <u>QuickSearch preferences</u>.

Use QuickSearch from the Content tab

1. In the <u>Content</u> tab of the <u>Explorer pane</u>, start typing a part number in the **QuickSearch** field.

The program displays a list of possible matches, up to a maximum of 50. This list contracts as you type in more of the part number.

Content				• t 🖾 👷 •		
Zone 1	:	Price Zor	e 1 USI	D		
QuickSea	rch 📿	mpt				
Name	Descrip	MFG	CAT	PN	Description	^
ARC ARC	ABCO	STC	SES	MPTAH6524P4	PANEL-TACK ACOUST, 4 CIRCT, HI T	
AT ATS	Affords	STC	SCA	MPTAH6524P4	PANEL-TACK ACOUST,4 CIRCT,HI T	
ALL ALC	Allabard	STG	SGS	MPTAH6524P4	PANEL-TACK ACOUST,4 CIRCT,HI T	
ALS	Alisteel	STC	SES	MPTAH6530	PANEL-TACK ACOUST, HI TOP CAP,	
AMG AMG	America	STC	SCA	MPTAH6530	PANEL-TACK ACOUST, HI TOP CAP,	
AMS AMS	America	STG	SGS	MPTAH6530	PANEL-TACK ACOUST, HI TOP CAP,	
BAS	Basyx	STC	SPS	MPTAH65306	PANEL-TACK ACOUST, HI TOP CAP,	
BLD	BOLD	STC	SPS	MPTAH653063	PANEL-TACK ACOUST, 3 CIRCT, HI T	
Alene	0	STC	SPS	MPTAH653064	PANEL-TACK ACOLIST 3+D CIRCT	~

By default, the QuickSearch filter is **on** so that the search is performed **on the current level (catalog or section)**. To turn off this filter, see <u>Filter QuickSearch</u>.

2. Select an item from the list by **double-clicking** on it.

Note: QuickSearch displays a maximum of 50 matching parts. You can change this number in the Preferences dialog. See <u>QuickSearch preferences</u> for details.

### Use QuickSearch from the Part Number field

- 1. In the <u>worksheet area</u>, click in the **Part Number** field.
- 2. Start typing the part number.

As you type in the part number, the program will display a list of possible matches, up to a maximum of 50. This list will contract as you type in more of the part number.

Wor	isheel	t				~							
ltem	1	3	1	Mfg	Cat	Part Number		per Part Description		Category			
(1)	0					VT-							
2	,			1	,	-	ALS	ALC	MFG	CAT	PN	Description	
	*				1	NUC	NUC	VR-42	Round Wood Tab	de Top, 42 Dia.			
						NUC	NUC	VR-48	Round Wood Tab	ole Top, 48 Dia.			
						30F	JOC	VR-6	6" DIAMETER VE	NEER POST			
						NUC	NUC	VR-60	Round Wood Tab	ole Top, 60 Dia.			
						ALS	ALC	VR-EOK	Virage Executive	Chair High-Back			
						ALS	ALC	VR-EOKFC	Virage Executive	Chair High-Back w/			
						ALS	ALC	VR-MOK	Virage Manageria	al Chair Mid-Back Op			
						ALS	ALC	VR-MOKEC	Virage Manageria	al Chair Mid-Back Op			

Note: By default, QuickSearch will provide a list of possible part numbers in **all available catalogs.** If you want the search limited to a certain manufacturer or catalog, enter a value in the **Mfg** or **Cat** fields before typing the part number.

3. Double-click on the desired part number to fill in the information.

Note: QuickSearch displays a maximum of 50 matching parts. You can change this number in the Preferences dialog. See <u>QuickSearch preferences</u> for details.

### Filter QuickSearch

By default, the QuickSearch filter is on so that QuickSearch searches **only within the current level**. For example, if you navigated down to a catalog, only that catalog will be searched. If you navigated down to a section, only that section will be searched.

To turn the filter on or off, click the filter button in the <u>Content tab</u>.

To see the difference with the filter on and off:

1. <u>Navigate to a part number</u>.

- 2. Make sure that the QuickSearch filter is on.
- 3. Type a part number that is from a different catalog. Notice that nothing is found even if the entire part number is entered.

Content		<b>★</b> # ×		
20.5"D	- t 🙆	🖞 救 •		
Zone 1 C   F	Price Zone 1 USD			
QuickSearch	462			
Name	Description	Details		
VREBL-2190	Rear unit, elec. access, d	\$7,264.00		
VREBL-2196	Rear unit, elec. access, d	\$7,465.00		
VREBL-21102	Rear unit, elec. access, d	\$7,683.00		
VREBL-21108	Rear unit, elec. access, d	\$7,858.00		
VREBL-21114	Rear unit, elec. access, d	\$8,018.00		
VREBL-21120	Rear unit, elec. access, d	\$8,235.00		
VREBR-2190	Rear unit, elec. access, d	\$7,264.00		
VREBR-2196	Rear unit, elec. access, d	\$7,465.00		
VREBR-2110	Rear unit, elec. access, d	\$7,683.00		
VREBR-2110	Rear unit, elec. access, d	\$7,858.00		
VREBR-2111	Rear unit, elec. access, d	\$8,018.00		
VREBR-2112	Rear unit, elec. access, d	\$8,235.00		

- 4. Click the Filter QuickSearch button to deactivate it.
- 5. Type the same part number. Notice the list of possible matches from all catalogs.

# **Search for products**

Use **2020 Search** to look for products in: manufacturer's catalogs, <u>custom catalogs</u>, and worksheets.

This tool is useful when searching multiple catalogs for products with a common element (panels, for example). It displays the search results in the Explorer bar's <u>Search</u> tab.

To access **2020 Search**, click *s* from the Tools toolbar or from the <u>Search tab</u> in Explorer.

You can search by part number or by part description.

### Search by part number

- 1. Click 🤍 from the Tools toolbar.
- 2. Under Search Field, select Part Number.
- 3. Under Manufacturer or Project File Type, select the manufacturer, Custom Catalog or Worksheets.
- 4. Under **Catalog or Project File**, select the catalog, custom catalog or worksheet.
- 5. Under Search String, type the full or partial part number.

You can use wildcards to replace missing or unknown characters. The "\*" will replace a string of characters. The "?" will only replace one character. You may have more than one wildcard in a search string.

6. Click **Search**. Your completed search should look similar to the image below. If there is no match, no items will appear.

20-2 Sea	0 Se	earch r catalogs, custom	catalogs, and worksheets for product inform	nation		9
earch Fie	ld:		Search String:			
Part Number		1	475485*	475485*		
anufactu	rer or P	roject File Type:			-	
STC -	Steelca	CP.			¥	Close
atalog	Project	File			1000	
acalog or	riojett	1 10.				Help
AI Ca	talogs			×	10	
esults:	Cat	Part Number	Part Description	Price	•••	Specify.
esults: Mfg	Cat CS1	Part Number 475485FSR	Part Description RETROFIT-FRAME, TX ARM, FELT GL	Price \$164.00	•••	Specify.
esults: Mfg STC STC	Cat CS1 CS1	Part Number 475485FSR 4754855SR	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL	Price \$164.00 \$161.00		Specify.
esults: Mfg STC STC	Cat CS1 CS1 SCN	Part Number 475485FSR 4754855SR 475485SSR 475485M	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL CHAIR-PLAYER, SLED BASE, TXT AR	Price \$164.00 \$161.00 \$401.00		Specify.
esults: Mfg STC STC STC STC	Cat CS1 CS1 SCN SCN	Part Number 475485FSR 4754855SR 475485M 475485M 475485MB	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR	Price \$164.00 \$161.00 \$401.00 \$468.00		Specify.
esults: Mfg STC STC STC STC STC	Cat CS1 CS1 SCN SCN SCN	Part Number 475485F5R 47548555R 47548555R 475485M 475485MB 475485MBF	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR	Price \$164.00 \$161.00 \$401.00 \$468.00 \$525.00		Specify.
Mig STC STC STC STC STC STC	Cat CS1 CS1 SCN SCN SCN SCN	Part Number 475485F5R 47548555R 47548555R 475485M 475485MB 475485MB 475485MB 475485MF	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR	Price \$164.00 \$401.00 \$468.00 \$525.00 \$458.00		Specify.
MFg STC STC STC STC STC STC STC STC	Cat CS1 CS1 SCN SCN SCN SCN SCS	Part Number 475485F5R 47548555R 47548555R 475485MB 475485MB 475485MB 475485MF 475485MF	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR	Price \$164.00 \$401.00 \$468.00 \$525.00 \$458.00 \$401.00		Specify.
esults: Mfg STC STC STC STC STC STC STC STC	Cat CS1 CS1 SCN SCN SCN SCN SCS SCS	Part Number 475485F5R 475485SSR 475485M8 475485M8 475485M8 475485M8 475485MF 475485MF 475485MF 475485M	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR	Price \$164.00 \$161.00 \$468.00 \$525.00 \$458.00 \$401.00 \$468.00		Specify.
MFg STC STC STC STC STC STC STC STC STC STC	Cat CS1 CC1 SCN SCN SCN SCN SCS SCS SCS SCS	Part Number 475485F5R 4754855SR 475485M8 475485M8 475485M8 475485M8 475485MF 475485MF 475485M 475485MB 475485MB	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR	Price \$164.00 \$161.00 \$468.00 \$4525.00 \$458.00 \$458.00 \$468.00 \$525.00		Specify.
All Ca esults: Mfg STC STC STC STC STC STC STC STC STC STC	Cat CS1 CCN SCN SCN SCN SCS SCS SCS SCS SCS	Part Number 475485PSR 475485SSR 475485M8 475485M8 475485M8 475485M8 475485MF 475485M 475485M8 475485M8 475485M8 475485M8 475485M8	Part Description RETROFIT-FRAME, TX ARM, FELT GL RETROFIT-FRAME, TX ARM, SS GL CHAIR-PLAYER, SLED BASE, TXT AR CHAIR-PLAYER, SLED BASE, TXT AR	Price \$164.00 \$161.00 \$468.00 \$525.00 \$458.00 \$468.00 \$468.00 \$525.00 \$458.00		Specify.

- 7. Hover over an item to select it.
- 8. Click any of the following:

**Specify** to launch <u>2020 Options</u>, where you can specify finish options for the selected item.

**Explore** to go to the product's location in the Content tab.

Send To to send the item to a custom catalog, worksheet or drawing

Note: The more catalogs you search through, the longer it will take. Click the **Abort** button if the search takes too long.

When you finish a search, search results are displayed in the Explorer <u>Search tab</u>. From here you can select products and send them into drawings or worksheets as you would from the <u>Content tab</u>.

### Search by part description

- 1. Click 🔍 from the Tools toolbar.
- 2. Under Search Field, select Part Description.
- 3. Under Manufacturer or Project File Type, select the manufacturer, Custom Catalog or Worksheets.
- 4. Under **Catalog or Project File**, select the catalog, custom catalog or worksheet.
- 5. Under **Search String**, type the full or partial part description.

You can use wildcards to replace missing or unknown characters. The "\*" will replace a string of characters. The "?" will only replace one character. You may have more than one wildcard in a search string.

6. Click **Search**. Your completed search should look similar to the image below. If there is no match, no items will appear.

20-2 Sea	0 Se	earch r catalogs, custom	catalogs, and worksheets for product infor	mation		9
arch Fiel	ld:		Search String:			
Part Description		1	chair sled	chair sled		
anufactu	rer or P	roject File Type:			-	
STC -	Steeka	ce .			~	Close
atalon or	Project	File			1000	
Latalog or Project File:						
scs -	Steekca	se Seating		~		Help
SCS - esuits: Mfg	Steeka Cat	se Seating Part Number	Part Description	Price		Help
SCS - esults: Mfg	Steeka Cat SCS	se Seating Part Number 4585023	Part Description CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00		Help
SCS - esuits: Mfg STC STC	Steeka Cat SCS SCS	Part Number 4585023 4585023F	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00		Help
SCS - esuits: Mfg STC STC STC	Steeka Cat SCS SCS SCS	se Seating Part Number 4585023 4585023F 4585023U	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00 \$784.00		Help
SCS - esults: Mfg STC STC STC STC	Steeka Cat SCS SCS SCS SCS	Part Number 4585023 4585023F 4585023F 4585023FU	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00 \$784.00 \$841.00		Help Help Specify. Explore Send I
scs- esuits: Mfg STC STC STC STC	Steeka Cat SCS SCS SCS SCS SCS	Part Number 4585023 4585023F 4585023F 4585023FU 4585023FU 45850235	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00 \$784.00 \$841.00 \$1,248.00		Help Help Specify. Explore Send I
scs- esults: Mfg STC STC STC STC STC STC	Steeka Cat SCS SCS SCS SCS SCS SCS	Part Number 4585023 4585023F 4585023F 4585023FU 4585023FU 45850235 4585023F5	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00 \$784.00 \$841.00 \$1,248.00 \$1,248.00 \$1,305.00		Help Help Specify. Explore Send I
scs- esults: Mfg STC STC STC STC STC STC STC	Steeka Cat SCS SCS SCS SCS SCS SCS SCS SCS	Part Number 4585023 4585023F 4585023F 4585023FU 4585023FU 4585023F5 4585023SU	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00 \$784.00 \$841.00 \$1,248.00 \$1,305.00 \$1,305.00 \$1,558.00		Help
scs- esults: Mfg STC STC STC STC STC STC STC STC	Steeka Cat SCS SCS SCS SCS SCS SCS SCS SCS SCS	Part Number 4585023 4585023F 4585023F 4585023FU 4585023FU 4585023FU 4585023SU 4585023SU 4585023SU 4585023SU	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00 \$784.00 \$841.00 \$1,248.00 \$1,305.00 \$1,558.00 \$1,615.00		Help
scs- esults: Mfg STC STC STC STC STC STC STC STC STC STC	Steeka Cat SCS SCS SCS SCS SCS SCS SCS SCS SCS SC	Part Number 45850230 45850230 45850230 45850239 45850239 458502350 45850230 45850	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00 \$784.00 \$841.00 \$1,248.00 \$1,305.00 \$1,558.00 \$1,615.00 \$620.00		Help
scs- esults: Mfg STC STC STC STC STC STC STC STC STC STC	Steeka Cat SCS SCS SCS SCS SCS SCS SCS SCS SCS SC	Part Number 4585023 4585023F 4585023F 4585023FU 4585023FU 4585023FU 4585023FU 4585023FU 4585023FU 4585023FU 4585023FU 4585023FU 4585023FU 4585023FU	Part Description CHAIR-SENSOR, MULTI USE, MID BK CHAIR-SENSOR, MULTI USE, MID BK	Price \$640.00 \$697.00 \$784.00 \$841.00 \$1,248.00 \$1,305.00 \$1,558.00 \$1,615.00 \$620.00 \$677.00		Help

- 7. Hover over an item to select it.
- 8. Click any of the following:

**Specify** to launch <u>2020 Options</u>, where you can specify finish options for the selected item.

**Explore** to go to the product's location in the Content tab.

Send To to send the item to a custom catalog, worksheet or drawing

Note: The more catalogs you search through, the longer it will take. Click the **Abort** button if the search takes too long.

When you finish a search, search results are displayed in the Explorer <u>Search tab</u>. From here you can select products and send them into drawings or worksheets as you would from the <u>Content tab</u>.

# **Preview a product**

The Product preview helps in the visual selection of products from a catalog and the visual identification of products already in a worksheet.



You can preview a single item if you select a product from a manufacturer catalog, or multiple items if you select a standard from a custom catalog. Note that the standard must have been created within CAP Designer, not Worksheet.

The product preview feature is available from different areas of 2020 Worksheet:

- Explorer pane
- Worksheet tab (Worksheet area)
- Item Properties
- Catalog Properties
- Item Detail view (Task Pane)
- Report Designer

You can do the following when previewing a product or standard:

- Change the preview image type
- Rotate or move an image
- 🕨 <u>Zoom an image</u>
- Change the ISO view
- Change the rendering mode
- Save the image
- 🕨 <u>Load an image</u>
- See also: Update preview images

Note: Product preview may not be available for all manufacturer products.

# Change the preview image type

1. Click on the **Auto** button, which is the left-most on the toolbar.



When you first preview an image, **Auto** is selected as the image type. Auto corresponds to the first image type checked in <u>Visualization Preferences</u> that has an available image.

2. Select the image type from the drop-down.

All image types (except text) allow <u>zooming in and out</u>. In addition, if you choose the Live Rendered image type, you can <u>rotate and move the image</u>.

Image type	Definition
Live Rendered	Interactive rendered image
Photograph	Photograph
Dimensional	Image with dimensional information
Context	Image of the content in a typical environment
Rendered Image	Rendered image
Text	Text description

The image is displayed using the image type you selected.

### Rotate or move an image

You can rotate or move live rendered images only.

To rotate an image horizontally:

- 1. Left-click the image. Keep holding the left mouse button.
- 2. Move the mouse left or right to rotate the image in a horizontal direction.

To move an image in any direction:

- 1. Click and hold both left and right mouse buttons.
- 2. Move the mouse in any direction.

### See also:

Change the ISO view

Note: To reset the view back to the default zoom and rotation, click 🖄.

# Zoom an image

- 1. Right-click the image and hold.
- 2. Zoom in/out my moving the mouse down/up.

Note: To reset the view back to the default zoom and rotation, click 🖄.

# **Change the ISO view**

Click any of the view buttons to position the image in a different ISO view:

- ISO SW position the image in an ISO southwest view
- ISO SE position the image in an ISO southeast view
- ISO NW position the image in an ISO northwest view
- ISO NE position the image in an ISO northeast view
- ISO Top view the image from the top

### See also:

Rotate or move an image

# Change the rendering mode

Click any of the rendering buttons to change the rendering mode:

Icon	Name	Description
	Shaded	view the image in a shaded rendering mode
\$	Wireframe	view the image in a wireframe rendering mode
Ô	Hiddenline Wireframe	view the image in a hidden-line wireframe rendering mode
	Greyscale	use the greyscale color palette when rendering
<b>id</b>	AutoCAD colors	use the AutoCAD color palette when rendering

Note: The Preview feature displays an image using the default image type set in <u>Visualization</u> <u>preferences</u>.

# Save the image

To save a snapshot of the image in BMP format:

- 1. Click 😼
- 2. Select the folder where you want to save the image.
- 3. Type the image name.
- 4. Click Save.

# Load an image

To use your own image for the preview:

- 1. Click 🞑.
- 2. Select the folder where the image is located.
- 3. Click on the image name then click **OK**.

The image you loaded is now displayed in the Preview.

Notice that if you click the Image type button, **User Image** is checked.

Media	🚰 🚽 🎓
Auto	D
Live	Rendered
Pho	tograph
Dime	ensional
Con	text
Ren	dered Image
Tex	t
🗸 User	r Image

Note: Selecting a user image does not change the default image displayed for the selected product/standard.

# **Options**

It is recommended to specify options once you are done adding all the products to your worksheet.

Manufacturers cannot fill an order unless all the items on the worksheet have finish information such as fabric, laminate, and/or paint colors.

There are several ways you can specify options in 2020 Worksheet:

- Specify access 2020 Options apply options to one item at a time
- Global options apply options to several items at the same time (recommended to save time)
- Option clipboard apply options to several items from similar items in the current worksheet or from another worksheet

### See also:

- Complete column
- Search for an option line
- Insert blank options and attributes
- Update against a worksheet
- Copy options and attributes (Block Assign)
- Show or hide rows
- Validate a worksheet

# Specify - access 2020 Options

To specify an item in a worksheet, right-click on the item then select **Specify**.

Note: If the item is incomplete, click the **Incomplete** icon in the **Complete** column:

Item	~	A	1	Mfg	Cat	Qty
1*	()	0		STC	SCA	1

You can also specify a product from any of the <u>Explorer</u> bar tabs by right-clicking on the product then selecting **Specify**.

In the 2020 Options dialog, you can do the following:

- Customize the 2020 Options dialog
- Select options
- Skip options
- Change options
- Apply default options automatically
- Preview options
- Preview structural options

Note: See <u>Global Options</u> to specify options for several items at the same time. See also <u>Option</u> <u>Clipboard</u> to apply options to several items from similar items in the current or another worksheet.

# **Global Options**

Global options gives you the ability to select and apply options to multiple items at the same time. This will save valuable time and reduce the chance for errors that occur during the specification stage of a project.

This is different than the <u>option clipboard</u>. The dialog allows you to work through an entire specification at the same time. You will see the line items that you will be applying finishes to, the option groups that need to be selected as well as the options available.

#### To set global options:

1. Click the **Global Options** tab at the bottom of the current worksheet.



2. You will be prompted to refresh global options based on any changes you have already made to finishes in the <u>Worksheet</u> view. Click **Yes** to refresh.

To make your choice the default behavior so that you do not see the prompt every time you click Global Options, check **Do not ask this again**.

See:

- Screen components to become familiar with the Global Options screen layout
- Select options using Global Options for step-by-step instructions on selecting global options
- Filtered items to see which items are filtered from the Global options tab

### **Screen components**

#### The Global Options screen is divided into 3 areas:

- Line item information
- Option groups
- Available options



#### Line Item Information

The Line Item Information area tells you which line items are going to receive the finishes that you are selecting in the <u>Option groups</u> area. By clicking on any one of the option groups the line items affected will appear in this window.

Global options will apply finishes to all items unless grouping is used in the Option Groups area.

100	Proper	ties	$\square$	Autosize			
	Qty	Mfg	Cat	Part Num	Part Description	Category	Tag
	6	ALS	A30	Y03624P	Base Panel Frame 36HX24	PANEL	P36
	3	ALS	A30	Y03630P	Base Panel Frame 36HX30	PANEL	
	6	ALS	A30	Y03630P	Base Panel Frame 36HX30	PANEL	P36

Click the <u>Filtered items</u> button in the Option Groups area to find out if items were filtered from the Global Options tab. This button is enabled only if there are filtered items.

### See also:

- Available options
- Select options using Global Options

### **Option Groups**

Option groups are the different types of finishes that need to be applied in a specification. By default, options are grouped by manufacturer code.

To group options by different criteria:

1. Click the **Group By** button in the Option Group area.

{ <b>]</b> }	Group By 👎 Filtered Items (1)	) 🛛 🚁 Refresh 🛛 🐺 Apply 🔹 Quick (	Options 🖓 🕅
	Option Groups	Selected Option	P
I A	ALS		
	2130 WOOD FINISHES	Skipped Option	?
	2131 FAB Selections	Skipped Option	?
	Edg Clr opts	Skipped Option	2
	Grommet Type Option	Skipped Option	2
	LAM Clr opts	Skipped Option	?
	Pnt Grd Opts	Skipped Option	?

2. Check the columns of information that you would like to group by. For example, you may want to group by category so that panels, worksurfaces, accessories, etc. are grouped together.

lobal Options Group By	<b>—</b> ×
▼ Mfg	Select All
Alt Mfg	
Cat	Clear All
Category	
Tag	テ
Generic	
Finish Code	<b>•</b>
Alias 1	
Alias 2	<b>F</b>
Alias 3	
Building	<b>F</b>
Floor	
Department	
Person	
Ousto #	

3. Change the sort priority by dragging the column.

In the above example, options will be sorted first by manufacturer, then by category.

- 4. Check **Use these settings as the default groupings** if you wish to set these columns as your default groupings.
- 5. Click OK.

The results help you to better understand the options that are being selected. For example, you can see easily that you have different paint colors for pedestals than for overheads.

Opt	ion Groups
- ALS	
🖃 F	PANEL
	CORE/MICA PAINT COLORS
	FAB TYPE optS
	SEATING
	#19 Cylinder opt
	#19 Frame Finish opt
	4100 PAINT optS
	4104 FAB Selections
	A19-HWB Fab Opt
	CASTER opt
	SUM Arm Cap Opt
	Sum Side Frame Opts
	Sum Side Glide Opt
	SUM-SOP FAB Selections
ΞV	VORKSURFACE
	Grommet Type Option

### **Available Options**

This window lists all of the available options for each <u>option group</u> as it is selected. Options are selected by clicking on the desired option.

You can skip over an option group by clicking on the **Next Group** button at the top of this area. Skipping options is useful if, for instance, the customer has not decided on a panel fabric color but has selected a grade of fabric.



Some catalogs allow you to preview options. For a list of catalogs that support option previews see the What's New file.



### See also:

- Line item information
- Select options using Global Options
- Filtered items

### **Select options using Global Options**

Note: By default, option groups are shown by manufacturer. Click **Group By** and check **Category** to further group by category. This way panels, worksurfaces, accessories, etc. are grouped together.

1. In the <u>Global Options</u> tab, click on the first <u>option group</u> in the listing.

Note that a question mark under the Flag  $\mathbb{F}$  column shows that the option group is skipped or has not been selected.

Group By 🖓 Filtered Items (0) 🔢	Refresh Apply Quick Options	W: Verty
Option Groups	Selected Option	P
🖃 ALS		-
PANEL		
Pnt Grd Opts	Skipped Option	?
SEATING		
2130 WOOD FINISHES	Skipped Option	2
2131 FAB Selections	Skipped Option	?
WORKSURFACE		
Edg Clr opts	Skipped Option	?
Grommet Type Option	Skipped Option	2
LAM Cir opts	Skipped Option	2

The <u>line item information area</u> will tell you which line items in the specification will be receiving the selected option group.

2. Click on the desired finish in the <u>Available Options area</u>.



Some catalogs have option preview available.

In some cases, a popup dialog will appear and you will have to enter your finish (customer's own material).

You can skip over an option group by clicking on the **Next Group** button at the top of this area.

3. In some cases, sub-options may open under the selected option, indicated by a minus sign.

Continue selecting options until the next top level option is highlighted.

Option Groups	Selected Option	9
- ALS		
PANEL		
Pnt Grd Opts	Skipped Option	?
SEATING		
2130 WOOD FINISHES	Skipped Option	?
2131 FAB Selections	GRD C COM UPH	~
Tracking Num Grade C COM Fab	Tracking Number Needed	×
- WORKSURFACE		
Edg Clr opts	Skipped Option	2
Grommet Type Option	Skipped Option	2
LAM Cir opts	Skipped Option	?

4. An option is selected and complete when there is a green checkmark in the **Flag** column.

If you see a red flag in the **Flag** column, it means that the option was selected automatically by <u>Quick Options</u>. You can accept this selection by clicking on the red flag or change the selection by highlighting it and clicking the **Verify** button.

5. If all option groups are checked when the finishes are applied, then all finishes are specified in the current worksheet.

Click **Apply** to take the finishes selected and apply them to the appropriate line items in the specifications. If you forget to do this before leaving Global Options, you will be prompted to do so.

### See also:

- Filtered items
- Screen components

Note: If you make changes in Global Options then click **Refresh** before clicking **Apply**, refreshing will discard the selections you made in Global Options and will reapply the options set in the worksheet.

The **Refresh** button forces the Global Options tab to take a look at the current worksheet and pull existing finishes into the Global Options tab. This is normally done when you <u>enter the Global Options</u> tab but if for some reason you chose not to refresh, this button will perform that function.

### Verify options if Quick Options is on

Quick Options allows the same option to be tentatively selected. This feature helps speed the selection process by looking for duplicate finish selections and applying the same finish.

For example, if there is a paint option on pedestals and overheads, once the finish is selected for the pedestals, the same finish will tentatively be applied to the overheads.

This is **NOT** a forced decision - you will still need to verify these selections.

1. Click the Quick Options button in the Option Groups area.

The **Quick Options** button is a toggle - if the button is highlighted the feature is turned on. If it is the same color as the other buttons the feature is turned off.

Iption Groups	Selected Option
A19-HWB Fab Opt	Quick Options Skipped Option
CASTER opt	Skipped Option
Grommet Type Option	Skipped Option
LAM Clr opts	Skipped Option
SUM Arm Cap Opt	Skipped Option
Sum Side Frame Opts	Skipped Option
Sum Side Glide Opt	Skipped Option
SUM-SOP FAB Selections	Skipped Option
Vinyl Edg opt	Skipped Option
🚽 design	
CORE/MICA PAINT COLORS	Skipped Option
FAB TYPE optS	Skipped Option
🖃 sales	
CORE/MICA PAINT COLORS	Skipped Option
FAB TYPE optS	Skipped Option

2. As finishes are selected, if a similar finish can be "assumed" quick options will pick that finish.

A red flag will be placed under the **Flag** column red to let you know that this was selected automatically by Quick Options.

Notice in the example below that the Core/Mica paint color was selected in the Design group and is indicated by a green check mark. In the Sales group this same option has a red flag indicating it was selected by Quick Option.

Option Groups	Selected Option	P ^
A19-HWB Fab Opt	Skipped Option	?
CASTER opt	Skipped Option	?
Grommet Type Option	Skipped Option	?
LAM Cir opts	Skipped Option	?
SUM Arm Cap Opt	Skipped Option	?
Sum Side Frame Opts	Skipped Option	?
Sum Side Glide Opt	Skipped Option	?
SUM-SOP FAB Selections	Skipped Option	?
Vinyl Edg opt	Skipped Option	?
🖃 design		
CORE/MICA PAINT COLORS	CLR: Driftwood	~
FAB TYPE optS	Skipped Option	?
🖃 sales	Number of the second	
CORE/MICA PAINT COLORS	CLR: Driftwood	٣
FAB TYPE optS	Skipped Option	? 🗸

3. To confirm an option selected by quick options, click on the red flag to turn it to a check.

To change the finish, highlight the option and click the **Verify** button.

Option Groups	Selected Option		F		
Grommet Type Option	Verify Skipped Option		?		
LAM Cir opts	Skipped Option Skipped Option				
SUM Arm Cap Opt					
Sum Side Frame Opts	Skipped Option		2		
Sum Side Glide Opt	Skipped Option		2		
SUM-SOP FAB Selections	Skipped Option		3		
Vinyl Edg opt	Skipped Option				
] design					
CORE/MICA PAINT COLORS	CLR: Driftwood		~		
FAB TYPE optS	GRD 2 FAB		~		
GRD 2 FAB	Skipped Option	Click on the flag to	1		
] sales		turn to a check			
CORE/MICA PAINT COLORS	CLR: Driftwood		~		
FAB TYPE optS	GRD 2 FAB		N		
GRD 2 FAB	Skipped Option		1		

Note: By default, **Quick Options** is automatically on. If you wish to change this setting, go to the **Tools** menu, **Preferences**, then click <u>Specification</u>.

### **Filtered items**

To prevent <u>Global Options</u> from updating certain items, they are filtered from the Global Options view:

- locked items
- <u>custom catalog</u> items
- items not found in the catalog
- items not <u>updated against the catalog</u>
- items created before Worksheet 3.0 that have never been updated against the catalog

To see the list of filtered items, click **Filtered Items** in the <u>Option groups area</u>. Note that the number of filtered items is indicated beside the button.

You can resize the Filtered Items dialog and its columns.

Qty         M         C.         Part.         Part Description         Categ         T         G         A         A         B         F         D         P           3         A         A         2131         Reinhard Conte         SEATI         3         A         A         F         D         P           3         A         A         FP36         Rudder PVC 36         WOR         3.         S	:	Lock Cust Item Item	ed it om ( s no s no s cre	ems Catalog it t found i t up-to-c sated pri	tems (products or st in the catalog late against the cat or to Worksheet 3.0	andards) alog ) that have	ne	ver be	en u	pdate	d aga	inst t	he ca	talog	
3         A. A. 2131         Reinhard Conte         SEATI           3         A. A. FP36         Rudder PVC 36         WDR         3.	Qty	М	C.	Part	Part Description	Categ	Т	G	A	A	A	B	F	D	P
3 A., A., FP36 Rudder PVC 36 WOR 3.	3	A.,	A.,	2131	Reinhard Conte	SEATI									
	3	A.,	A.,	FP36	Rudder PVC 36	WOR	3.								

You can also right-click on an item and select **Properties** to display the **Product Group Properties** dialog.

#### See also:

- Select options using Global Options
- Screen components

# **Option Clipboard**

The Option Clipboard view of the <u>Task pane</u> is used for quickly applying options to a worksheet from similar items in the same worksheet, a previously opened worksheet, or from a saved Option Set file.

<ul> <li>Option Clipboard</li> <li>Option Trail Actions         <ul> <li>Copy</li> <li>Copy</li> <li>Paste</li> <li>Paste with Criteria</li> <li>Remove</li> <li>Properties</li> </ul> </li> <li>Option Clipboard</li> <li>Metal Grommets (Qty 2)</li> <li>EL CLR: Matte Silver</li> </ul>	8
Option Trail Actions Copy Paste Paste with Orteria Remove Properties Option Clipboard AWS WORKSURFACE (unnamed) ····································	8
Option Clipboard  AWS WORKSURFACE (unnamed)  .~ EE Edg: Cloud M Metal Grommets (Qty 2) EL CLR: Matte Silver	*
AWS WORKSURFACE (unnamed) "Solid Colors"" .EE Edg: Cloud M Metal Grommets (Qty 2) EL CLR: Matte Silver	
Option Set Actions	*
🎾 Load	
🙀 Save As	
🖾 Empty	

For details about the three sections in the Option Clipboard, see Option Clipboard sections.

To apply options to the worksheet:

- 1. Copy options to the clipboard
- 2. Use the Option trail to apply options to other items.

If you wish, you may save options in an option set so that you can apply them to other worksheets.

Note: Remember to do an <u>Update Against Catalog</u> whenever you use the Option Clipboard. Updating against the catalog is vital if you assign finishes from one item to another because these finishes may include a price up-charge that needs to be reflected in the total pricing.

### **Option Clipboard sections**

The Option Clipboard view has three sections:

- Option Trail Actions provides tools for capturing option trails (all of a line item's assigned options) from items in a project, applying captured option trails to items in a project, and viewing and modifying properties of captured option trails.
- Option Clipboard displays captured option trails. These option trails are selected individually or in groups for application to items in a project. Right clicking on an option trail provides quick access to a menu of option trail action commands.
- Option Set Actions provides tools for saving the content of the Option Clipboard as an Option Set, loading a saved Option Set into the Option Clipboard, and emptying the entire contents of the Option Clipboard.

Copy options to the Option Clipboard

- 1. Switch to the Option Clipboard view in Task Pane.
- 2. <u>Select</u> a <u>completely specified line</u> or make it <u>current</u>.

### 3. Click **Copy** on the Task Pane.

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Item	1	8	1	Mfg	Cat	Qty	Part Number	Part Descr 🐴	Option Trail Actions	۲
1	1			ALS	A30	6	Y03624P	Base Panel Frame 35 Top Cap	Paste	
							\$(METALL) .PR5	Metallic Clr Opts CLR: Champagne Me	<ul> <li>♥ Paste with Criteria</li> <li>X Remove</li> </ul>	
2	~			ALS	A30	3	Y03630P	Base Panel Frame 36 Top Cap	Option Clipboard	*
							\$(METALL) .PR5	Metallic Clr Opts CLR: Champagne Me	A30 PANEL (unnamed)	
3	1			ALS	A30	6	Y03630P	Base Panel Frame 36 Top Cap	.PR5 CLR: Char	upts npagne Metallic
							\$(METALL) .PR5	Metallic Clr Opts CLR: Champagne Me		
4	~			ALS	ALC	3	2131	Reinhard Contempora Wood Arms	-	
							.J \$(CCOM) .QTEC	FINISH: Henna Cherry GRD C COM UPH Tracking Number Nee		
5	-			ALS	AWS	3	FP723624U	Rudder PVC 72Wx36 w/Grom		
							.~	**Solid Colors***		
							.EE	Edg: Cloud	Option Set Actions	*
							M	Metal Grommets (Qty	🎱 Load	
-							EL	CLR: Matte Silver	😼 Save As	
<		1 AL			1		Immediate at the		Empty	
	N	Work	sheet	Glob	al Options	/ Cov	er Page / Report /			

The options from that line item will be copied to the Option Clipboard.

If the option trail is already in the clipboard, a notification dialog opens.

Note: You can select multiple lines. Each unique option trail in the selection will be copied to the clipboard. Duplicate trails will not be copied.
### **Option trail**

Option trails <u>copied to the clipboard</u> can be used in a variety of ways:

- Paste a single option trail onto a single line item in the worksheet
- Paste a single option trail to multiple line items in the worksheet
- Paste multiple option trails to multiple line items in the worksheet

#### See also Option Trail Properties

#### **Option Trail Properties**

When an option trail is captured on the clipboard it carries with it additional properties associated with the line item from which it was copied. These properties can be edited for the captured option trail, but those edits **are not** reflected back to the original line item from which it was copied. Also, if these properties are changed on the original line item, they **are not** updated for the captured option trail on the clipboard.

#### To view an option trail's properties:

Hove the cursor over an option trail in the clipboard.

A popup dialog (Option Trail Properties) opens, listing that trail's properties and current values. This dialog is for information only and disappears after a brief delay.

If you do not see the popup dialog, activate it by going to the Tools menu, Preferences. Click <u>Specifications</u>.

#### To edit an option trail's properties:

- 1. Click the option trail in the clipboard.
- 2. Right-click then select **Properties**.

This brings up the **editable** Option Trail Properties dialog.

3. You can edit, add or delete the value for any property as necessary.

All property values come from the original line item, except for the **Name** property. The **Name** property allows an option trail to be labeled with freeform text. It can be used for any purpose, such as labeling the option trail according to the project location to which that trail applies.



See also:

- Apply an option trail to one item
- Apply an option trail to several items
- Apply several option trails to several items

Apply an option trail to one item

- 1. From the Option Clipboard select one option trail.
- 2. Drag it onto a line item in the worksheet and drop it to apply.

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	taskp	ane.sp	+ (m	odified)						* X	(a) (a) (b) Option Optional
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Item	1	2	1	Mfg	Cat	Part Number	Part Description	Category	Qty	_^	Conv
ų	-			SIC	ISA	US2448	WORKSURFACE-STRAIGHT,24X48	WORKSURFACE	2		Paste
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E				STC	TSA	UCC224848	WORKSURFACE-CORNER CURVED	WORKSURFACE	1		Uption Clipboard
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				STC	TSA	TS76648TF	PANEL-FULL TACKABLE	PANEL	1		Coed
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Once the option is applied, a results dialog box appears. The results show:

- How many items were processed (how many items the options were copied to)
- How many are complete with no skipped options
- How many items are still incomplete and need more options added
- How many unique option lines were pasted
- How many options were skipped

When you apply an option trail to an item, the software automatically does an update against the catalog for the options in that item. This is a partial update — it does not affect the part description or the unit list price of the base item, only the option pricing. You still need to <u>update against the catalog</u>.

#### See also:

- Option Trail Properties
- Apply an option trail to several items
- Apply several option trails to several items

Note: Options will be applied similarly to the way default options are applied in the <u>Specify</u> tool. If you apply the options from one item to a different product type, each option will be checked to see if it's a valid option — only the ones that are valid will be used.

#### Apply an option trail to several items

You can apply one option to items in the worksheet that share common characteristics. When using this technique you will ensure that options are assigned where desired.

You can apply an option trail to:

- selected items in the worksheet
- items that match a specific criteria
- items that match the trail properties

In the example below, we will apply an option trail to items that match the option trail's **Mfg** and **Category** columns:

- 1. From the Option Clipboard, select one option trail.
- 2. Click Paste with Criteria under Option Trail Actions.
- 3. Check the **Mfg** and **Category** boxes in the option trail **Column** section and click the **OK** button.

Paste Options With O	riteria		6
Paste Options			
O to the selecter	1 items		
0			
<ul> <li>to all items in t</li> </ul>	he current level		
			Where the item matches the
Using the following cri	teria:		option trail for these columns:
Column	Operator	Value	e Column
Flag	equals	on	✓ Mtg
Mfg	equals	1	Category
Cat	equals		Cut
Part Number	equals		Tag
Part Description	equals		Generic
Category	equals		Alias 1
Qty	equals	0	Alias 2
List	equals	0.00	Alias 3
Ext List	equals	\$ 0.00	Building
			Floor
			Department
			Person
			OK Cancel

After the application process has completed a status dialog opens reporting on the results.

4. Click **OK** to review the results in the worksheet.

Notice that all items in the worksheet matching both the **Mfg** and **Category** properties are populated with the option trail's content.

#### See also:

- Option Trail Properties
- Apply an option trail to one item
- Apply several option trails to several items

Note: When you apply an option trail to an item, the software automatically does an update against the catalog for the options in that item. This is a partial update — it does not affect the part description or the unit list price of the base item, only the option pricing. You still need to <u>update against the catalog</u>.

Apply several option trails to several items

- 1. <u>Select</u> several items in the worksheet.
- 2. In the <u>Option Clipboard</u> select several adjacent options by holding the SHIFT key or non-adjacent options by holding the CTRL key.
- 3. Click Paste under Option Trail Actions.

This will apply selected options from the clipboard to the selected line items in the worksheet. A status dialog opens reporting the results.

#### See also:

- Option Trail Properties
- Apply an option trail to one item
- ♦ Apply an option trail to several items

Note: It is good practice to double check the results to ensure all options have been assigned as desired.

When you apply an option trail to an item, the software automatically does an update against the catalog for the options in that item. This is a partial update — it does not affect the part description or the unit list price of the base item, only the option pricing. You still need to <u>update against the catalog</u>.

### **Option Sets**

The Option Clipboard allows you to quickly apply pre-selected options to other worksheets.

First, you must save the <u>contents of the option clipboard</u> to an Option Set.

Then, you can then <u>load this option set</u> to the clipboard and apply the options to items in your worksheet.

#### Save option sets

The <u>Option Clipboard</u> allows you to quickly apply pre-selected options to other worksheets. You can do this by saving the <u>contents of the option clipboard</u> to an Option Set.

#### To save all the contents of the option clipboard to an option set:

- 1. Click Save As under Option Set Actions.
- 2. In the Save As dialog enter a name for the file.

By default, it will be saved in the My Documents \Cap \OptionSets directory with an

extension of *.optionset*. You may save this to another location by changing the Save in location.

3. Click Save.

Load and apply option sets

To apply a <u>saved</u> option set:

- 1. In a worksheet, clear the <u>option clipboard</u> if necessary by clicking **Empty** under **Option Set Actions**.
- 2. Click Load under Option Set icons.
- 3. In the **Manage Option Sets** dialog, click the Option Set to select it and load it in the **Option Clipboard**.

# **Complete column**

The **Complete** column indicates if an item is optioned and complete, optioned but needing an update, incomplete, or unknown. It is automatically populated when working on the Worksheet.

The four states are:

1	Item has all the options specified.
	Item is missing option information. Clicking on this icon will open the <u>2020 Options</u> dialog.
	This icon appears when options have been applied using Option Clipboard, Block Assign or Global Options but haven't been <u>updated against the</u> <u>catalog</u> for pricing. Clicking on this icon will bring up the <b>Update Against</b> <b>Catalog</b> dialog.
0	This icon appears when a blank line is added to the worksheet or if the item isn't found in the manufacturer's catalog.

# Search for an option line

- 1. Click M on the <u>Standard toolbar</u>.
- 2. Check Advanced.
- 3. Under Item Detail Search Criteria, click Type to select Option.

4. Type in the number and/or description you are looking for.

Column	Operator	Value		0.1.1.1
Complete	equals	Complete		Select All
Lock	equals	Locked		Cancel
Flag	equals	on	-	Concer
Annotation	equals		-	A duppered
Mfg	equals			
] Cat	equals			Clear curre
Part Number	equals			selection
Special	equals			
Part Description	equals			
Category	equals		-	
m Detail Search Cri <b>Type</b>	Number	Description		Add
m Detail Search Cri Type ption	Number	Description		Add Remove

5. Click Find Next.

Worksheet puts the cursor on the cell containing the text you entered.

6. To search for the same text again using the same search direction, press F3.

#### See also:

- Use Advanced Find to Select Items
- Find and replace an item

# **Discounts and price adjustments**

This section shows you how to:

- > apply various types of <u>discounts</u> to items in the worksheet
- use price adjustments to change the total price
- recalculate the Grand Total

See also Sub-totals

## Discounts

In this section, you will learn about the various types of discounts, how to apply discounts to a worksheet, and how to change columns to view the discount.

There are various types of discounts in Worksheet. The following are definitions of each discount type.

Discount type	Definition
Sell -%	The discount percentage off the list price given to the client or end user.
Sell +%	The mark-up percentage to the client or end user based on the dealer's cost.
Purchase %	The dealer discount, a percentage off the list price.
Margin %	The gross profit percentage which is calculated as Margin\$ divided by Sell\$.

### Notes:

- List \$ = The manufacturer's published list price.
- Purchase \$= the dealer's cost after discounts.
- Sell \$ = The cost to the client or end user.

Margin \$ = The profit margin in dollars which is the difference between what the end user paid (Sell \$) and what the dealer paid (Purchase \$).

### To apply a discount:

- 1. From the **Worksheet** menu, click **Apply Discount**.
- 2. To save this discount to the <u>current discount schedule</u>, type a discount **Description**.
- 3. Click Sell- %, Sell+ % or Margin % and enter the percentage.
- 4. Check the box for the **Purchase %** and enter the percentage.

Discount values can be entered as a straight percentage (i.e. 35%) or as a breakdown. Click the solution to apply discounts on top of discounts (i.e. 50/10/5).

Type the first discount in the top box, tab to the next field to enter the compound discount. The **Discount Breakdown** will automatically do the math.



Note: If you have a four-tier discount, put the total discount on the first line then put the fourth discount on the second line.

6. You can apply discounts based on Column Heading criteria, for example, Cat equals SCA. This will have the discount apply to only lines that have SCA in the Cat column. Using the "equals" Operator indicates that the column must meet the exact criteria. You can also change the Operator to "is not equal" or "contains" by clicking in the Operator cell.

Apply Discount	8			
Description:	New Discount	<b>#</b> 1		
💿 Sel- %	30	3	<	
O Sell+ %	0		<	
O Margin %	0		2	
Purchase %	57.250		3	
DPP %	0		2	
Discount Criteria:				
Column	Opera	tor	Value	^
Mig	equals			
Cat	equals		SCA	
Part Number	equals			
I Part Descriptio	n equais			
Discount Applicat	xon /			
O Apply discour	nt to the current	item		
O Apply discour	nt to the selecter	d items		
<ul> <li>Apply discourt</li> </ul>	nt to all items (wi	thin all le	vels)	
Add this discour	nt to the current	schedule	e.	
			<u> </u>	Cancel

7. Click **Apply discount to all items (within all levels)**. For information about levels see <u>Standards</u> and <u>Outline levels</u>.

You can also apply discounts to the current item, or to the selected items.

- 8. Check Add discount to the current schedule to save the discount to a schedule.
- 9. Click **OK**.

Note: To view the discount columns in the worksheet, right-click on any column header then select **Customize columns**.

#### See also:

- View discounts applied to an item
- Modify discounts
- Discount schedules

### **Discount schedules**

A Discount Schedule is a group of individual discounts saved in one file. This file can be shared and used again and again if you do projects where the same discounts will apply.

#### To apply a discount schedule to a worksheet:

1. From the Worksheet menu, click Apply Schedule.

The Apply Schedule dialog will open.

pply Sched	lule				(
chedule File:	<untitled></untitled>			Load.	Save
Discount Typ	ie ints in this Schedule	Total Discount	Discount #1	Discount #2	Discount #3
Add	Modify	Remove	Print		
<ul> <li>Apply sch</li> <li>Apply sch</li> <li>Apply sch</li> </ul>	hedule to the current its hedule to the selected if hedule to all items (with	em tems in all levels)			
Apply sch	hedule to all items (with	in all levels)		Apph	/ Close

- Click Add and a blank Add Discount dialog box will open. Here you can <u>create other</u> <u>discounts</u> to add to the current discount schedule. For example, you can add a discount for each Cat code in your worksheet.
- 3. To apply selected discounts within the schedule to your worksheet, highlight the discounts you want to apply. Use the SHIFT or CTRL key.

To apply all the discounts in the schedule to the worksheet, click the first line (**Discounts in this Schedule**).

- 4. Under **Schedule Application**, select whether to apply the schedule to the current item, the selected items, or all items.
- 5. Click Apply.

#### See also:

- Save discount schedules
- Apply saved discount schedules
- Modify or remove a discount from a schedule
- Print a discount schedule

#### Save discount schedules

If you want to use discount schedules in other worksheets you can save them in your project folder.

- 1. In the **Apply Schedule** dialog, click **Save** and the **Save As** dialog box will show the Projects folder.
- 2. Type the schedule name then click **Save**.

Note: If you do not save the schedule, 2020 Worksheet will prompt you to save it when you close the worksheet.

Apply saved discount schedules

- 1. From the Worksheet menu, select Apply Schedule.
- 2. Click Load to open the saved schedule.
- 3. From the list of discounts in the schedule, select the ones you would like to apply. You can use the SHIFT or CTRL key.

To apply all the discounts in the schedule, click the first line (**Discounts in this Schedule**).

nequie me.	D:\My Documents\CA	P\Projects\Client.d	sc	Load.	Save
Discount Type		Total Discount	Discount #1	Discount #2	Discount #3
Discoun	ts in this Schedule	_			6
🗄 🧰 Seat	ing				
- III S	ell Minus	30.000	30.000	0.000	0.000
E P	urchase	57.250	50.000	10.000	5.000
🖃 🛄 Syst	ems				
- E S	ell Minus	30.000	30.000	0.000	0.000
P P	urchase	58.200	50.000	12.000	5.000
E Filing	)				
Add	Modify	Remove	Print		

- 4. Under **Schedule Application**, select whether to apply the schedule to the current item, the selected items, or all items.
- 5. Click Apply.

Notes: If your discounts overlap, apply the more general discount first, then go back to **Apply Schedule** and select the more specific discount. If there are discounts you commonly use, create a discount schedule with all the standard product lines you use and name it **Standard.dsc.** 

Modify or remove a discount from a schedule

- 1. From the Worksheet menu, choose Apply Schedule.
- 2. In the **Apply Schedule** dialog, if you have an existing discount, select the discount folder and click **Modify**. This will display the **Modify Discount** dialog box if you need to make changes.

To remove a discount, select the discount folder and click **Remove**. A confirmation message will appear. Click **Yes**.

		Load.	Save.	0
Total Discount	Discount #1	Discount #2	Discount #3	^
30.000	30.000	0.000	0.000	
57.250	50.000	10.000	5.000	
30.000	30.000	0.000	0.000	-
58.200	50.000	12.000	5.000	
				~
Remove	Print			
tem				
items				
hin all levels)				
	Total Discount 30.000 57.250 30.000 58.200 Remove	Total Discount         Discount #1           30.000         30.000           \$7.250         \$0.000           30.000         30.000           \$8.200         \$0.000           Remove         Print           tem         kems           in all levers(s)         \$0.000	Total Discount         Discount #1         Discount #2           30.000         30.000         0.000           57.250         50.000         10.000           30.000         30.000         0.000           30.000         50.000         12.000           Remove         Print         Print	Total Discount         Discount #1         Discount #2         Discount #3           30.000         30.000         0.000         0.000           \$7.250         \$0.000         10.000         5.000           30.000         30.000         0.000         5.000           \$8.200         \$0.000         12.000         \$.000           Remove         Print         Print

3. If you want to apply the modified discount within the schedule to your worksheet, highlight the discount then click **Apply**.

Print a discount schedule

Use the **Print** command in the **Apply Schedule** dialog to open a text file containing all the discounts in your schedule. This is a handy way to view all discounts, their percentages and criteria. You can then print this text file.

#### To print a discount schedule:

- 1. From the Worksheet menu, choose Apply Schedule.
- 2. In the **Apply Schedule** dialog, select the discount folder and click **Print**. This will open a text file with all the discount information.

# **Modify discounts**

There are many ways you can modify discounts in a worksheet.

If you saved the discount in a schedule, see Modify or remove a discount from a schedule.

If you did not save the discount in a schedule:

- 1. Right-click on the item and select **Properties**.
- 2. Click on the **Discounts** tab.

Descript	tion Rudder P	VC 72Wx36	Dx24W Lam w/G Generic: Alias 2:	rom	Alias 3:	
Pricing	Discounts	😮 Dețails				
iscount	s Associated with	this Item				200.00
Type			Breakdown Total	Breakdown 1	Breakdown 2	Breakdown 3
Margir	h Percent		10	10	0	0
r da	All Darr					

3. To edit discounts, click Edit All. Modify the discounts then click OK.

To remove all discounts, click **Remove All**. When a confirmation message appears, click **Yes**.

4. Click Close.

View discounts applied to an item

To view discounts applied to one item:

- 1. Right-click on the item and select **Properties**.
- 2. In the Item Properties dialog, click on the Discounts tab.
- 3. Click Close.

See <u>Item properties</u> for more information about the **Item Properties** dialog.

#### See also:

- Modify discounts
- Discount schedules

# **Price adjustments**

Price adjustments are bottom-line amounts that affect the grand totals of the worksheet.

There are three different types of price adjustments:

- fixed amount for example, a design fee or a handling charge
- percentage for example, a sales tax or bottom line discount
- <u>advanced</u> for scaled adjustments. For example, you may want orders of less than \$50,000 to receive a 2% reduction and orders above 50,000 to receive a 3% reduction.

To insert a price adjustment, from the <u>Item toolbar</u>, click <sup>Insert</sup> and select **Price Adjustment**. **See also:** 

### Modify or move adjustments

- Delete an item
- Show or hide rows

### **Fixed amount**

Use the **Fixed Amount** Adjustment type for fixed amount charges or reductions, such as a design fee or handling charge.

1. In the Select Adjustment Type screen of the Adjustment Properties Wizard, type the name in the **Description** field.

This description will appear under the Part Description column.

2. If you want information to appear under the **Mfg**, **Cat** and **Part #** columns, type the text in the appropriate boxes.

3. Leave the Adjustment Type as **Fixed Amount**.

Please select the type of adjustment you want to enter.  Jjustments affect the grand totals of the worksheet. They come in three mis: fixed-amount, percent, and advanced. Fixed-amount adjustments a eful for simple miscellaneous charges. Percent adjustments are useful for les tax, etc.  Adjustment Information Description:  New Price Adjustment (optional) Mfg: Cat: Part #:
justments affect the grand totals of the worksheet. They come in three rms: fixed-amount, percent, and advanced. Fixed-amount adjustments a eful for single miscellaneous charges. Percent adjustments are useful for les tax, etc. Adjustment Information Description: New Price Adjustment (optional) Mfg: Cat: Part #:
Adjustment Information Description: New Price Adjustment (optional) Mfg: Cat: Part #:
Description:           New Price Adjustment           (optional) Mfg:         Cat:         Part #:
New Price Adjustment (optional) Mfg: Cat: Part #:
(optional) Mfg: Cat: Part #:
idjustment Type         Fixed           Fixed-Amount         Example: This adjustment type might lused to apply a set amount for design work.           Percent         work.
Include preceding adjustments in this adjustment's calculation
Allow succeeding adjustments to use this adjustment in their calculation
Include in SIF output as a line item
Add to worksheet template

- 4. Check **Include** preceding adjustments... if you want adjustments that appear before this one to be factored in its calculation.
- 5. Check **Allow succeeding adjustments...** if you want to allow adjustments that follow this one to use it in their calculations. For example, check this for a handling charge that must be taxed.
- 6. Check **Include in SIF output as a line item** if you want this adjustment to appear as a line item in a SIF output.
- 7. Check **Add to worksheet template** if you want to add this price adjustment in a <u>worksheet template</u>.

- 8. Click Next.
- 9. In the Fixed Amount Adjustment Details screen, select **Charge** if you want to add this amount to the grand total. Select **Credit** if you want to subtract this amount from the grand total.

Adjustment Proper	ties Wizard	X
Fixed-Amount Adj Please enter the	ustment Details details of the fixed-amount adjustment.	
Fixed-amount adjust the worksheets gran Ocreent Amount: 0.00	ments are values that are added to or subtracted from d total. This adjustment can be discounted as necessary. dit	
Adjustment Discour	nt 0.00 <<	
O ≦ell +%	0.00	
O <u>M</u> argin %	0.00	
Purchase %	0.00 <<	
< Back	lext > Finish Close He	lp )

- 10. Enter an amount in the **Amount** field.
- 11. You can also <u>discount</u> this adjustment if necessary by typing in values under **Adjustment Discount**.

#### 12. Click Finish.

At the bottom of your worksheet, you will see a new green line with the price adjustment.

Note: To see a fixed amount adjustment example, see <u>Example - create a design fee</u>.

Example - create a design fee

- 1. In the Select Adjustment Type screen, type Design Fee in the Description field.
- 2. Leave the Adjustment Type as Fixed Amount.
- 3. Clear Include preceding adjustments...
- 4. Leave **Allow succeeding adjustments...** checked since you want to allow adjustments that follow this one to use it in their calculations.
- 5. Click Next.
- 6. In the **Fixed Amount Adjustment Details** screen, select **Charge** to add this amount to the grand total.
- 7. Enter 200 in the **Amount** field.
- 8. Click Finish.

At the bottom of your worksheet, you will see a new green line with the price adjustment.

Item	Part Description	Category Qty		List	List Sell		Ext Sell	
1	Office Workdesk, 72W x 30D-2 Ped	un bereiten bertig	2	\$ 1,584.00	\$ 1,393.92	\$ 3,168.00	\$ 2,787.84	
2	Drafting Table, 55W x 32D		1	\$ 606.00	\$ 533.28	\$ 606.00	\$ 533.28	
3	Panel Frame, 24W x 36H		5	\$ 201.00	\$ 176.88	\$ 1,005.00	\$ 884.40	
	Design Fee		1	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	
	Grand Total					\$ 4,979.00	\$ 4,405.52	

### Percentage amount

Use the Percentage amount adjustment type for charges such as taxes or credits such as bottom-line discounts.

1. In the **Select Adjustment Type** screen of the **Adjustment Properties Wizard**, type the name in the **Description** field.

This description will appear under the **Part Description** column.

- 2. Under Adjustment Type select Percent.
- 3. If you want information to appear in the **Mfg**, **Cat** and **Part #** columns, type the text in the appropriate boxes.
- 4. Check **Include preceding adjustments...** if you want adjustments that appear before this one to be factored in its calculation.

For example, if a handling charge appears before this price adjustment, check this option to apply a tax to the charge.

5. Check **Allow succeeding adjustments...** if you want to allow adjustments that follow this one to use it in their calculations.

In most cases, if this is a tax type adjustment you would clear this box.

- 6. Check **Include in SIF output as a line item** if you want this adjustment to appear as a line item in a SIF output.
- 7. Check **Add to worksheet template** if you want to add this price adjustment in a worksheet template.
- 8. Click Next.
- 9. In the **Percent Adjustment Details** screen, select **Charge** if you want to add this amount. Select **Credit** if you want to subtract this amount.

Please enter the deta	ils of the percent	adjustment.	
Percent adjustments are criterion set on the next p	calculated values t bage.	based on items includ	led by the
⊙ <u>Charge</u> O C <u>r</u> edit			
Adjustment Percentage:	0.00		
Calculate off of Column:	Ext Sell	~	
Sell			

- 10. Enter the Adjustment Percentage.
- 11. Beside **Calculate off Column,** select the column you want to use to calculate the adjustment percentage.

For example, if **Adjustment Percentage** = 10% and you selected **Ext. Sell**, which has a value of \$5,000, the adjustment amount would be .10 X 5,000 = 500.

- 12. Select the column(s) where you want to add or subtract the adjustment List, Purchase and/or Sell.
- 13. Click Next.
- 14. In the **Price Adjustment Criteria** screen, you can use criteria to filter which item's values are used to find the ending percentage.

For example, your percentage adjustment could only consider items from a specific catalog. In that case you would check the **Cat** column, select the equals **operator** then type in the catalog code in **Value**.

If you do not wish to use any criteria simply leave this screen blank.

#### 15. Click Finish.

At the bottom of your worksheet, you will see a new green line with the price adjustment.

Note: To see percentage amount adjustment examples, see <u>Example - add a tax</u> and <u>Example - price</u> reduction for parts from a specific catalog.

Example - add a tax

Before doing this exercise, do Example - create a design fee.

- 1. In the Select Adjustment Type screen, type Sales Tax in the Description field.
- 2. Under Adjustment Type select Percent.
- 3. Check **Include preceding adjustments...** so that the adjustment you created previously will be included in this adjustment's calculation.
- 4. Clear **Allow succeeding adjustments...** since you do not want subsequent adjustments to include this tax in their calculations.
- 5. Click Next.

- 6. In the Percent Adjustment Details screen, select Charge.
- 7. Enter 7 in the **Adjustment Percentage**.
- 8. Beside Calculate off Column, select Ext. Sell.
- 9. Under Add or Subtract Adjustment's Value to these Columns check Sell.
- 10. Click Next.
- 11. In the Price Adjustment Criteria screen, simply leave this screen blank.
- 12. Click Finish.

At the bottom of your worksheet, you will see a new green line with the price adjustment.

If you did the Example - create a design fee, you will notice that the tax you just created is applied to the design fee.

Item	Part Description	Part Description Category Qty		List	Sell	Ext List	Ext Sell	
1	Office Workdesk, 72W x 30D-2 Ped	Ped	2	\$ 1,584.00	\$ 1,393.92	\$ 3,168.00	\$ 2,787.84	
2	Drafting Table, 55W x 32D		1	\$ 606.00	\$ 533.28	\$ 606.00	\$ 533.28	
3	Panel Frame, 24W x 36H		5	\$ 201.00	\$ 176.88	\$ 1,005.00	\$ 884.40	
	Design Fee		1	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	
	Sales Tax		1	\$ 0.00	\$ 308.39	\$ 0.00	\$ 308.39	
	Grand Total					\$ 4,979.00	\$ 4,713.91	

Example - price reduction for parts from a specific catalog

- 1. In the Select Adjustment Type screen, type Price Reduction in the Description field.
- 2. Under Adjustment Type select Percent.
- 3. In the **Part # column**, type Promotion.
- 4. Clear Include preceding adjustments...
- 5. Clear Allow succeeding adjustments...
- 6. Click Next.
- 7. In the Percent Adjustment Details screen, select Credit.
- 8. Enter 5 in Adjustment Percentage.
- 9. Beside Calculate off Column, select Ext. Sell.
- 10. Under Add or Subtract Adjustment's Value to these Columns check Sell.
- 11. Click Next.
- 12. In the **Price Adjustment Criteria** screen, check the **Cat** column, select the equals **operator** then type in a catalog code (make sure that there are items from this catalog in your worksheet) in **Value**.
- 13. Click Finish.

At the bottom of your worksheet, you will see a new green line with the price adjustment.

Item	Part Number	Part Description	Category	Qty	List	Sell	Ext List	Ext Sell
1	WS7230P2	Office Workdesk, 72W x 30D-2 Ped		2	\$ 1,584.00	\$ 1,393.92	\$ 3,168.00	\$ 2,787.84
2	DRAFTING TABLE 5532	Drafting Table, 55W x 32D		1	\$ 606.00	\$ 533.28	\$ 606.00	\$ 533.28
3	PF2436	Panel Frame, 24W x 36H		5	\$ 201.00	\$ 176.88	\$ 1,005.00	\$ 884.40
	Promotion	Price Reduction		1	\$ 0.00	(\$ 210.28)	\$ 0.00	(\$ 210.28)
		Grand Total					\$ 4,779.00	\$ 3,995.24

Note: Although you can use the <u>Apply Discount</u> dialog to achieve the same result, creating a Price Adjustment will call special attention to this discount since a line is added to the worksheet.

### **Advanced adjustment**

Use this adjustment type for scaled adjustments. For example, you may want orders of less than \$50,000 to receive a 2% reduction and orders above 50,000 to receive a 3% reduction.

1. In the Select Adjustment Type screen of the Adjustment Properties Wizard, type the name in the Description field (for example, Large Order Discount).

This description will appear under the **Part Description** column.

- 2. Under Adjustment Type select Advanced.
- 3. If you want information to appear in the **Mfg**, **Cat** and **Part #** columns, type the text in the appropriate boxes.
- 4. Check **Include preceding adjustments...** if you want adjustments that appear before this one to be factored in its calculation.
- 5. Check **Allow succeeding adjustments...** if you want to allow adjustments that follow this one to use it in their calculations.

- 6. Check **Include in SIF output as a line item** if you want this adjustment to appear as a line item in a SIF output.
- 7. Check **Add to worksheet template** if you want to add this price adjustment in a worksheet template.
- 8. Click Next.
- 9. In the **Advanced Adjustment Details** screen, select **Charge** if you want to add this amount. Select **Credit** if you want to subtract this amount.
- 10. Under **Adjustment Conditions**, specify pricing criteria to use to determine which adjustment should be applied. You can specify up to 5 criteria.

**Important** - conditions are evaluated from top to bottom. The **first** condition that matches will determine the calculation used.

Note: Read each condition as: When Total \_ Is \_ Amount, Use \_.

In the example below, a flat fee of \$150 will be charged if the **Ext. Weight** is less than 5,000. If the **Ext. Weight** is greater than or equal 5,000 pounds, a charge of 5 cents per pound will be applied.

Adjustment Conditions								
When Total	Is	Amount	Use					
Ext Weight 🛛 🗸	< 💌	5000.0( 🔽	\$ 150.00 = Simple \$ 💌					
Ext Weight	<	Max 💌	\$ 0.05 * Ext Weight 🗸					

You could read the above conditions as: When Total Ext. Weight Is < 5000, Use \$150.00. When Total Ext. Weight Is < Max, Use \$0.05 X Ext. Weight.

11. Select the column where you want to add or subtract the percent adjustment - List, Purchase or Sell.

- 12. Click Next.
- 13. In the **Price Adjustment Criteria** screen, you can use criteria to filter which item's values are used to find the ending percentage.

For example, your adjustment could only consider items from a specific catalog. In that case you would check the **Cat** column, select the equals **operator** then type in the catalog code in **Value**.

If you do not wish to use any criteria simply leave this screen blank.

14. Click Finish.

At the bottom of your worksheet, you will see a new green line with the price adjustment.

Note: To see advanced adjustment examples, see <u>Example - discount for large orders</u> and <u>Example -</u> <u>shipping charge based on weight</u>.

**Example - discount for large orders** 

In this example, you will define the following discounts:

2% for orders >= 50,000 and < 100,000

3% for orders >= 100,000 and < 250,000

4% for orders >= 250,000

- 1. In the Select Adjustment Type screen, type Large Order Discount.
- 2. Under Adjustment Type select Advanced.
- 3. Clear Include preceding adjustments...
- 4. Clear Allow succeeding adjustments...
- 5. Click Next.

- 6. In the Advanced Adjustment Details screen, select Credit.
- 7. Under Adjustment Conditions, select the following information:

Adjustment Conditions								
When Total	Is	Amount	Use					
Ext Sell 🛛 👻	>= 🗸	250000 🗸	% 4.00 of Ext Sell 🔽					
Ext Sell	>=	100000 🔽	% 3.00 of Ext Sell 🔽					
Ext Sell	>=	50000.( 🔽	% 2.00 of Ext Sell 🛛 👻					

The order of conditions is important as they are evaluated from top to bottom. The **first** condition that matches will determine the calculation used.

- 8. Under Add or Subtract Adjustment's Value to these Columns check Sell.
- 9. Click Next.
- 10. In the Price Adjustment Criteria screen, simply leave this screen blank.
- 11. Click Finish.

At the bottom of your worksheet, you will see a new green line with the price adjustment.

In the example below, the order was greater than 100,000 so a discount of 3% was applied.

Item	Part Number	Part Description	Category	Qty	List	Sell	Ext List	Ext Sell
1	WS7230P2	Office Workdesk, 72W x 30D-2 Ped	a un na anna Anna.	50	\$ 1,584.00	\$ 1,393.92	\$ 79,200.00	\$ 69,696.00
[2]	DRAFTING TABLE 5532	Drafting Table, 55W x 32D		40	\$ 606.00	\$ 533.28	\$ 24,240.00	\$ 21,331.20
3	PF2436	Panel Frame, 24W x 36H	ana	60	\$ 201.00	\$ 176.88	\$ 12,060.00	\$ 10,612.80
sub		Subtotal					\$ 115,500.00	\$ 101,640.00
		Large Order Discount		1	\$ 0.00	(\$ 3,049.20)	\$ 0.00	(\$ 3,049.20)
		Grand Total					\$ 115,500.00	\$ 98,590.80

#### Example - shipping charge based on weight

In this example, you will add a shipping charge to the worksheet. You will charge a flat fee of \$150 if the **Ext. Weight** is less than 5,000 pounds. If the order is greater than or equal 5,000 pounds, you will charge 5 cents per pound.

- 1. In the **Select Adjustment Type** screen, type Shipping Charge.
- 2. Under Adjustment Type select Advanced.
- 3. Clear Include preceding adjustments...
- 4. Clear Allow succeeding adjustments...
- 5. Click Next.
- 6. In the Advanced Adjustment Details screen, select Charge.
- 7. Under Adjustment Conditions, on the first line enter the following:


8. On the second line, enter the following information:



- 9. Under Add or Subtract Adjustment's Value to these Columns check Sell.
- 10. Click Next.
- 11. In the Price Adjustment Criteria screen, simply leave this screen blank.
- 12. Click Finish.

At the bottom of your worksheet, you will see a new green line with the price adjustment.

In the image below, the Ext. Weight exceeded 5,000 pounds, meeting the second condition, so the shipping charge equals \$0.05 X Ext. Weight.

Item	Part Description	Category	Qty	List	Sell	Ext List	Ext Sell	Ext Weight
1	Office Workdesk, 72W x 30D-2 Ped		25	\$ 1,584.00	\$ 1,393.92	\$ 39,600.00	\$ 34,848.00	7,425.000
2	Drafting Table, 55W x 32D		10	\$ 606.00	\$ 533.28	\$ 6,060.00	\$ 5,332.80	1,350.000
3	Panel Frame, 24W x 36H		10	\$ 201.00	\$ 176.88	\$ 2,010.00	\$ 1,768.80	210.000
	Shipping Charge		1	\$ 0.00	\$ 449.25	\$ 0.00	\$ 449.25	
	Grand Total					\$ 47,670.00	\$ 42,398.85	8,985.000

### Modify or move adjustments

You can modify adjustments two ways: from the **Worksheet Properties** dialog, and directly <u>from the</u> <u>worksheet</u>.

From the Worksheet Properties dialog box:

- 1. Click the <u>Adjustments</u> tab.
- 2. In this tab, you can:
  - Click **Add** to create a new fixed or percent adjustment.
  - Select a price adjustment then click **Remove** to delete it.
  - Click Remove All to delete all price adjustments.
  - Select an adjustment then click Edit to modify it.
  - Use the arrows to change the order in which an adjustment takes effect and its order of appearance in this window.

* General Corder	Columns	A Header/Footer	Adjustments
ou can use this page to djustments, delete adj OTE: adjustments add	change the value ustments, or changed here are shown	of adjustments, cro ge the order of adju at the root level of	eate new stments. the worksheet.
Description		Amount	
Design Fee		200.0000	
S)Tax		6.5	

3. Click **OK** or **Apply**.

From the worksheet:

- 1. Right-click on any adjustment to edit it directly from the worksheet.
- 2. In the pop-up menu you can:
  - Select Insert Adjustment to create a new fixed or percent adjustment
  - Select Delete Adjustment
  - Select **Properties** to edit the adjustment
  - Click Move Up or Move Down to change the order in which an Adjustment takes effect and its order of appearance in the worksheet.

142	WORKSUR	WORKSURFACE-STRAIGHT,24X42							178.00	\$	178.00
De Ta	Design Fee	-			7	1	\$	200.00	\$	200.00	
	Тах	Tax Delete Adjustment			trl+Shift+D		1	\$	315.03	\$	315.03
	Grand Tota		Properties							5	7,153.03
al Options / Cover Page			Move Up Move Down			_	_				
reet		ι	\$7,153.03	P: \$3,352.81	S: \$	5,161.63		2	Price	e Adj	ustment Iter

Note: You can edit an adjustment by clicking on the line.

# **Recalculate the Grand Total**

If you delete a price adjustment from the <u>Worksheet Properties</u> dialog, the Grand Total values might not immediately reflect the removed amount.

Use the **Recalculate** command from the **Worksheet** menu to recalculate the Grand Total amounts.

# **Subtotals**

Subtotals are added to the worksheet as another line similar to the **Total** line. The items continue to be numbered normally above and below them.

#### See:

- Insert subtotal through MultiSort
- Insert subtotal manually
- Insert subtotal by a selection set
- Remove subtotals

# Insert subtotal through MultiSort

The easiest way to insert subtotals is through MultiSort.

- 1. Click  $\stackrel{A}{2}$  on the <u>Worksheet toolbar</u>.
- 2. Notice that the first checked column is in bold font. This is the primary sort column that will be used to insert subtotals.

If you want to change the primary sort column, use the **Top**, **Move Up**, **Move Down** and **Bottom** buttons.

Clear All Top Move Up Move Down E Bottom
emoved by the sort of the primary eld must be Alias1, ea Tags)
Mfg Cat Part Number Part Description Department Qty List Ext List Ascending (09, Occending (90, A2) WARNING: Existing subtotals will be re Usert Subtotals after each unique value of the field (the first checked field in the list) Subtotal by Area Tag (primary sort field Alias2, or Alias3 and contain valid Area

- 3. Check Insert subtotals after each unique value of the primary sort field.
- 4. Click OK.

This will add subtotals lines of the primary sort column to your worksheet.

			Grand Total			\$	5,713.00
	SCS		SCS Subtotal			\$	1,583.00
STC	SCS	LEAPV2	462 CHAIR-ADJ SEAT, UPH, HWPD ARM, LMBR	1	\$ 1,139.00	\$	1,139.00
STC	SCS	475485MF	475 CHAIR-GUEST,SLED BASE,OPN TEXT PLSTC ARM,MONO FRAME,FCS	1	\$ 444.00	5	444.00
	SCF		SCF Subtotal			\$	811.00
STC	SCF	RLF18422F	LATERAL FILE-2 DRAWER,FLUSH FRONT,18X42X28	1	\$ 811.00	\$	811.00
	SCA		SCA Subtotal			\$	3,319.00
STC	SCA	MUS2442	WORKSURFACE-STRAIGHT,24X42	1	\$ 178.00	\$	178.00
STC	SCA	MUCC2222	WORKSURFACE-CORNER,CURVED, 24X24X42X42	1	\$ 368.00	\$	368.00
STC	SCA	MU2824BBFL	PEDESTAL-FIXED,2 BOX/1 FILE DWR,LK,AVENIR PULL,23-1/2D	1	\$ 586.00	\$	586.00
STC	SCA	MPTAM6542P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,42-5/16X64-11/16	1	\$ 889.00	\$	889.00
STC	SCA	MPTAM6524P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,24-5/16X64-11/16	1	\$ 754.00	\$	754.00

### See also:

- Insert subtotal manually
- Insert subtotal by a selection set
- Remove subtotals

# Insert subtotal manually

To insert a price adjustment, click for a line select **Subtotal**, **Single**.

The subtotal will do the sum of all the items above it to the top of the worksheet or to the previous subtotal.

: Class Pr	oject	~						
Mfg	Cat	Part Number 3	Part Description	Department	Qty	1	List	Ext List
STC	SCS	475485MF	475 CHAIR-GUEST,SLED BASE,OPN TEXT PLSTC ARM,MONO FRAME,FCS		1	\$	444.00	\$ 444.00
STC	SCS	LEAPV2	462 CHAIR-ADJ SEAT, UPH, HWPD ARM, LMBR		1	\$	1,139.00	\$ 1,139.00
STC	SCA	MBBL4216	BIN-STORAGE,LK,15-5/8X41-3/4X 17-1/8		1	\$	544.00	\$ 544.00
STC	SCA	MPTAM6524P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,24-5/16X64-11/16		1	\$	754.00	\$ 754.00
			Subtotal					\$ 2,881.00
STC	SCA	MPTAM6542P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,42-5/16/64-11/16		1	\$	889.00	\$ 889.00
STC	SCA	MU2824BBFL	PEDESTAL-FIXED,2 BOX/1 FILE DWR,LK,AVENIR PULL,23-1/2D		1	\$	586.00	\$ 586.00
STC	SCA	MUCC2222	WORKSURFACE-CORNER,CURVED, 24X24X42X42		1	\$	368.00	\$ 368.00
STC	SCA	MUS2442	WORKSURFACE-STRAIGHT,24X42		1	\$	178.00	\$ 178.00
STC	SCF	RLF18422F	LATERAL FILE-2 DRAWER, FLUSH FRONT, 18X42X28		1	\$	811.00	\$ 811.00
	1		Grand Total					\$ 5,713.00

You can move the subtotal line up or down in the worksheet and it will total the items above it.

Move it using the move

buttons. Notice the subtotal will automatically update as you move

See also:

the lines.

- Insert subtotal through MultiSort
- Insert subtotal by a selection set
- <u>Remove subtotals</u>

# Insert subtotal by a selection set

Another way to add a subtotal to the worksheet is to select a range of items.

From the Item toolbar, click Insert and select Subtotal, By Selection.

If there are unselected items before the first selected item, the selected items will be moved up in the worksheet to follow the first subtotal appearing before the first selected items, or the top of the worksheet if there are no subtotals above the first selected item.

If the selection set was not contiguous, the unselected items will be moved below the inserted subtotal.

See also:

- Insert subtotal through MultiSort
- Insert subtotal manually
- Remove subtotals

### **Remove subtotals**

To remove one or many subtotals:

1. <u>Select the subtotal</u> or make it <u>current</u>.

If there is both a current item and a selected item in the worksheet, the selected item will be deleted.

- 2. Right-click and select Delete, Current Item (or Selected Item).
- 3. Click **Yes** when you see a confirmation message.

To remove all subtotals, from the Item menu select Delete, All Subtotals.

To hide subtotals but not remove them, see <u>Show or hide rows</u>.

# **Custom catalogs**

Custom catalogs are a powerful way to capture, store, and reuse tools that you create in Worksheet and CAP Designer.

- A Custom Catalog is a separate file that captures, manages, and allows the user to reuse products.
- This Custom Catalog file (.cc4) can be used and accessed by other people in a company by placing the custom catalog on a network.
- They are flexible and powerful because you, the user, can define them.
- You can place items into your Custom Catalog through both Worksheet and CAP Designer.
- A Custom Catalog is different from a Manufacturer's Catalog in that you can add and edit items, descriptions and pricing into your Custom Catalog.

#### See also:

- Custom catalogs vs. manufacturer catalogs
- Add items to a custom catalog
- Create a custom catalog
- Manage custom catalogs
- Modify an item in a custom catalog
- Reuse and update items from a custom catalog
- Break custom catalog link

Note: When you place an item in a custom catalog, you are responsible for updating its price. If you want to use the current pricing from the manufacturer's catalog, you will need to <u>update against a</u> <u>manufacturer catalog</u>

### **Custom catalogs vs. manufacturer catalogs**

Standard manufacturer catalogs appear in the Explorer's Content Tab.

Custom catalogs appear in the Projects tab.

As with standard catalogs, you drill down to the custom catalog. The difference is that **you** can add items into your custom catalogs. Example: If you have saved a CAP <u>Standard</u> into your custom catalog, you will see the following appear in the Projects tab:

- The custom catalog icon 😑 🧼 New Custom Catalog.cc4
- A custom catalog CAP Standard icon 😑 🞯 Typical Workstation 1
- 🕨 An individual product within that CAP Standard 😐 🖹 WCEL-5030
- You can also place a specific part from that Standard into a worksheet

# Add items to a custom catalog

You can add different types of items to your custom catalog:

- Individual Products
- Standards
- Specials (Individual Products or Custom Items)

You can add items to your custom catalog from:

- a worksheet
- the <u>Content tab</u>
- Specify
- a Search window

Add items into a custom catalog from a worksheet

- 1. <u>Select one or several items</u> or make a line item <u>current</u> in the worksheet.
- 2. Click Send To on the Item toolbar and select Custom Catalog Wizard.
- In the Send to Custom Catalog Wizard, select a custom catalog (ending with .cc4). To create a new custom catalog, see <u>Create a custom catalog</u>.
- 4. Click Next.
- 5. In the next screen, you can choose to:

Add in a custom catalog as a product or Add in a custom catalog as a Standard Note: If you made a mistake and want to delete a custom catalog, select it then press **Delete**. For more information about managing custom catalogs, <u>click here</u>.

Add items into a custom catalog from the Content tab

- 1. In the <u>Content tab</u> of the Explorer pane, <u>navigate to a specific product</u>.
- 2. Right-click on a part number.
- 3. Select Send To, Custom Catalog Wizard.
- In the Send to Custom Catalog Wizard, select a custom catalog (ending with .cc4). To create a new custom catalog, see <u>Create a custom catalog</u>.
- 5. Click Next.
- 6. See: Add in a custom catalog as a product.

Note: Sending an item into your custom catalog this way will send the item without any options added.

Add items into a custom catalog from Specify

- 1. From the <u>2020 Options</u> dialog, select options for the item.
- 2. Click Send To, Custom Catalog Wizard.
- In the Send to Custom Catalog Wizard, select a custom catalog (ending with .cc4). To create a new custom catalog, see <u>Create a custom catalog</u>.
- 4. Click Next.
- 5. See <u>Add in a custom catalog as a product</u>.

### Add items into a custom catalog from Search

- 1. Do a <u>Search by part number</u> or <u>by part description</u>.
- 2. After the search is complete, click **Send To** then **Custom Catalog Wizard**.
- In the Send to Custom Catalog Wizard, select a custom catalog (ending with .cc4). To create a new custom catalog, see <u>Create a custom catalog</u>.
- 4. Click Next.
- 5. See <u>Add in a custom catalog as a product</u>.

### Add in a custom catalog as a product

First, access the Custom Catalog Wizard from a <u>worksheet</u>, the <u>Content tab</u>, <u>2020 Options</u>, or <u>Search</u> and then select a location within the custom catalog to store the item.

1. Select Store in the custom catalog as a Product.



- 2. Click Next.
- 3. In the Product Properties dialog box make any necessary changes to the information being displayed. You can put a special price. Make sure the **Quantity** is set to **1**.

Product Properties Edit the informatio	an required to describe a Pro	oduct.		Ċ
	Mfg. Code:	EXP	Quantity:	
	Catalog Code:	EXP	Unit List Price (not including upcharges): \$760	.00
	Part Number:	EXHB		
	Part Description:	Executive H	ligh-Back Chair	4

- 4. Click Finish.
- 5. Go to the <u>Projects tab</u> in <u>Explorer</u> and click <sup>10</sup> to display the custom catalog you created as well as the product you just added to that custom catalog.
- 6. To add this product to a worksheet, see <u>Reuse an individual part from a custom</u> <u>catalog</u>.

#### See also:

Add in a custom catalog as a Standard

### Add in a custom catalog as a Standard

You may want to select several items in your worksheet and add those items as a <u>Standard</u> into your custom catalog. By adding these items as a Standard they will appear within one group.

You must first <u>select several items</u>, access the <u>Custom Catalog Wizard from a worksheet</u> and then choose a location in the custom catalog.

- 1. When you are in the **Saving Your Work** screen you can only select **Store in the custom catalog as a Standard** because you have selected multiple items.
- 2. Click Next.
- 3. Enter a name and a description for the Standard.

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- 4. Leave **Consolidate the parts in this Standard** checked so that identical parts in the standard will be consolidated.
- 5. If necessary, assign Alias values to all the components of the Standard.
- 6. Click Finish.
- 7. Go to the Projects tab in Explorer and click<sup>10</sup> to display the Standard in the custom catalog.

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							Grand Total

8. To add this Standard to a worksheet, see <u>Reuse a Standard from a custom catalog</u>.

To add an individual part from this Standard to a worksheet, see <u>Reuse an individual</u> part within a Standard from a custom catalog

### **Create a custom catalog**

1. In the **Custom Catalog Wizard**, right-click on **Local Projects**, select **New**, then **Custom Catalog**.

#### Or click the **New** button.



2. A **New Custom Catalog.cc4** appears. Highlight the **New Custom Catalog.cc4** and rename it.

Note: If you want to delete a custom catalog, click on it then press **Delete**.

### Manage custom catalogs

To manage custom catalogs (remove, rename, etc.), right-click on a custom catalog in the **Projects** tab of the <u>Explorer pane</u>.

Then, select the option corresponding to the modification you need to make.

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# Modify an item in a custom catalog

The <u>Projects tab</u> in Explorer gives you the ability to modify items that are within a custom catalog. You can:

- delete an item within the custom catalog
- update against a current manufacturer's catalog
- specify options on a part within a custom catalog

### Delete an item from a custom catalog

- 1. In the <u>Projects tab</u> of <u>Explorer</u>, expand the custom catalog.
- 2. Select the part then Press **Delete**.
- 3. Click **Yes** when a confirmation message appears.

### Update an item against a manufacturer catalog

When a product is in the Custom Catalog, the price will not automatically update when a new price list is released on the Worksheet Monthly Update. You can use this to your advantage for clients that are on old pricing or have special prices for items. For example, if they don't pay upcharges for certain items you can change the price on those products.

If you want to have the prices use the current pricing from the Manufacturer Catalog, you need to update your Custom Catalog when a new price list is released. You can update the entire catalog or just individual items in it.

- 1. In the <u>Projects tab</u> of <u>Explorer</u>, highlight the catalog or part you want to update.
- 2. Right-click and select **Update**.

This will launch the Update Against Catalog Wizard.

Add options to an item in a custom catalog

1. In the <u>Projects tab</u> of <u>Explorer</u>, highlight the part you want to add options to.

If the part is within a <u>Standard</u> you will need to expand the Standard to view the part.

- 2. Right-click and select Specify.
- 3. Select options for the item and then click **OK**.
- 4. Go back to the **Projects tab** and click **Refresh** to display the options you added to the item in your custom catalog.

Notice that the options you specified appear listed under that product.

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# Reuse and update items from a custom catalog

Custom catalogs give you the ability to reuse items in worksheets and drawings.

You can reuse:

- Individual products
- Standards
- Individual products pulled from within a Standard

Depending on which option you chose above, updating an item against a catalog either updates against the custom catalog or the manufacturer's catalog. See <u>What happens when you update custom catalog</u> <u>items</u>.

Reuse an individual part from a custom catalog

- 1. In the <u>Projects tab</u> of <u>Explorer</u>, highlight the part you want to reuse in your custom catalog.
- 2. Drag and drop it into the worksheet on the right side of the screen.

The part will appear in the worksheet as a line item. The item appears in yellow in the worksheet. This represents a individual item from a custom catalog.



When you do an Update Against Catalog on this item, it will update against the custom catalog.

Because this item is linked to the custom catalog, when changes occur in the custom catalog they will be reflected in the worksheet.

Note: You can reuse any item in a custom catalog, regardless of whether it was created in Worksheet or in CAP Designer.

Reuse a Standard from a custom catalog

- 1. In the <u>Projects tab</u> of <u>Explorer</u>, highlight the Standard you want to reuse from your custom catalog.
- 2. Drag and drop it into the worksheet on the right side of the screen.

Notice the pink color that represents a Standard line item in a worksheet.



If you <u>step into the Standard</u>, the products within a Standard appear in yellow in the worksheet.

The Standard is linked to the custom catalog (as indicated by the yellow lines). When you do an <u>update</u> <u>against a catalog</u> in the worksheet, the Standard will be updated against the custom catalog.

If changes are made to the Standard in the custom catalog, such as adding options or changing prices, the Standard in the worksheet will reflect that change the next time an Update Against Catalog is performed in the worksheet.

To better understand this, do the exercise below:

- 1. Go to the **Projects Tab** in **Explorer** and <u>add or change the options</u> to one line of your Standard.
- 2. Click on the Standard line and do an Update against Catalog in the worksheet.

You should see that the Standard price has changed and the options have been added to that line in the Standard.

Reuse an individual part within a Standard from a custom catalog

- 1. In the <u>Projects tab</u> of <u>Explorer</u>, expand the Standard, and highlight the individual part you want to reuse in your custom catalog.
- 2. Drag and drop it into the worksheet on the right side of the screen.
- 3. The Individual Part from the Standard will appear in the worksheet as a line item. Notice the color that represents an individual part in the worksheet.

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Note: The individual part taken from a Standard will update against the manufacturer catalog when you perform an <u>Update Against a Catalog</u>.

### What happens when you update custom catalog items

Here's a summary of what will happen when you reuse individual products, standards, or individual products from standards in a worksheet then do an <u>update against catalog</u>:

Individual Products	Update against $\rightarrow$	Custom Catalog		
Standards	Update against $\rightarrow$	Custom Catalog		
Individual Products pulled from a Standard	Update against $ ightarrow$	Manufacturer Catalog		

# **Break custom catalog links**

If you do not want the individual products or Standards to update against the custom catalog they came from but rather against the current manufacturer catalog, you can break the link.

See:

- Break a link on an individual product
- Break a link on a Standard

Break a link on an individual product

- 1. Make the custom individual product line item <u>current</u> or <u>select the items</u> to unlink.
- 2. From the Edit menu and select Break Custom Catalog Link.
- 3. Click **Yes** on the confirmation message.

Notice that the product now appears as a normal product line, that is, the color has changed to white.

Note: If you were now to <u>update against a catalog</u>, this item would update against the current manufacturer catalog and not the custom catalog from which it came.

### Break a Link on a Standard

There are two ways to break a Standard link:

- flatten all the components into the worksheet as individual line items
- break the link to the custom catalog and convert the Standard to an Outline level.

The advantage of the Outline method is that you can <u>update against the manufacturer's catalog</u>, but still have a line representing the whole Standard.

See also Save as single level worksheet - to create a new worksheet with individual line items

#### Flatten a Standard

- 1. Make the <u>Standard</u> line item <u>current</u>.
- 2. From the Edit menu, select Flatten Standard or Outline Level.
- 3. Click **Yes** when you see a confirmation message.

Now all the components from the Standard are individual items in the worksheet. Similar items will not be combined. Use <u>Consolidate</u> to combine them.

**Break a Standard Link** 

If you would rather the items be in a separate folder but still be able to update against the catalog you can also use Break Catalog Link.

- 1. Make the Standard line <u>current</u>.
- 2. From the Edit menu and select Break Custom Catalog Link.

3. Click **Yes** when you see a confirmation message.

Notice that the Standard now appears as a green outline level.

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	2		STC	SCS	475485MF	475 CHAIR-GUEST, SLED BASE, OPN TEXT PLSTC ARM, MONO FRAME, FCS		1	\$ 444
	3		STC	SCS	475485MF	475 CHAIR-GUEST,SLED BASE,OPN TEXT PLSTC ARM,MONO FRAME,FCS		1	\$ 444
	4		STC	SCS	LEAPV2	462 CHAIR-ADJ SEAT, UPH, HWPD ARM, LMBR		1	\$ 1,139
	5		STC	SCA	MPTAM6542P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,42-5/16X64-11/16		1	\$ 889
	6		STC	SCA	MU2824BBFL	PEDESTAL-FIXED,2 BOX/1 FILE DWR,LK,AVENIR PULL,23-1/2D		1	\$ 586
	7		STC	SCA	MUCC2222	WORKSURFACE-CORNER,CURVED, 24X24X42X42		1	\$ 368

If you <u>step into</u> this Outline level, you would see that the items within the Standard now appear as normal product lines and have been multiplied by the number of Standards that were originally there. Notice that the header is the same green, indicating that you have stepped into an Outline level.

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	STC	SCA	MBBL4216	BIN-STORAGE, LK, 15-5/8X41-3/4X 17-1/8		1	\$ 544.00	\$ 544.00	
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If you were now to <u>update against a catalog</u>, all of the products in this Outline level would update against the current manufacturer catalog and not the Custom Catalog from which they came.

You can later <u>Flatten the Outline level</u> from the **Edit** menu.

# **Standards**

Standards are groups of products that usually represent a workstation. You can create a Standard from the worksheet or from a CAP Designer drawing. See <u>Add items to a custom catalog</u> for information on creating Standards from a worksheet. See the Create a CAP Standard section in the CAP Designer help file for more information on creating Standards from a drawing.

Once you have created a Standard you can reuse it by dragging it into a worksheet.See <u>Reuse a</u> <u>Standard from a custom catalog</u> for details.

This section describes how to modify and use Standards.

#### See also:

- View the contents of a Standard
- Step out of a Standard
- Redefine a Standard
- Save as single level worksheet
- Print multiple levels
- Show levels in Explorer
- Break a link on a Standard
- Outline levels
- Delete an item

# View the contents of a standard

Viewing the contents of the Standard is also called **Stepping into a Level**.

To view what is in a Standard you can:

Click the Level drop-down on the header then select Step In.



Use the Name fly out. You can also jump from one Standard to another from here.

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When you step into a Standard, notice that the lines are yellow, because the parts come from a <u>Custom</u> <u>Catalog</u>. Also notice the title has changed to the name of the Standard in the header (Level bar).

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2	1	S	TC	SCA	MPTAM6542 P3	PANEL-TACK ACOUST 3 CIRCT MED TOP CAP 42-5/16/84-11/16	2	\$ 889.00	\$ 1,778.00
3	STC SCA MU282488FU		MU28248BFL	PEDESTAL-FIXED,2 BOW1 FILE DWR,LK,AVENIR PULL,23-1/2D	1	\$ 586.00	\$ 586.00		
4	1	S	TC	SCA	MUCC2222	WORKSURFACE-CORNER, CURVED, 24/24/42/42	1	\$ 368.00	\$ 368.00
5	1	S	TC	SCA	MUS2442	WORKSURFACE-STRAIGHT,24X42	2	\$ 178.00	\$ 356.00
6	3	S	TC	SCF	RLF18422F	LATERAL FILE-2 DRAWER, FLUSH FRONT, 18:42:28	.1	\$ 982.00	\$ 982.00
7	1	S	TC	scs	475485MF	475 CHAIR-GUEST, SLED BASE, OPN TEXT PLSTC ARM, MONO FRAME, FCS	1	\$ 444.00	\$ 444.00
8	1	S	TC	SCS	475495MF	475 CHAIR-GUEST, SLED BASE, OPN TEXT PLSTC ARM,MONO FRAME, FCS	3	\$ 464.00	\$ 1,392.00
9	1	S	TC	SCS	LEAPV2	462 CHAIR-ADJ SEAT, UPH, HWPD ARM, LMBR	1	\$ 1,139.00	\$ 1,139.00
10	1	S	тс	SCS	475495MF	475 CHAIR-GUEST, SLED BASE, OPN TEXT PLSTC ARM, MONO FRAME, FCS	1	\$ 464.00	\$ 464.00
	1				Тур В	Typical 8 - 6x6 Workstation			\$ 9,353.00

# Step out of a Standard

The most common ways of stepping out of a Standard are:

Click the Level drop-down on the header then select Step Out.

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**b** Use the **Name** fly out. You can also jump from one Standard to another from here.

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# **Redefine a Standard**

When a Standard is in a custom catalog it can be edited from Explorer, Worksheet or in CAP Designer. Example of redefining a Standard in the worksheet:

- 1. <u>Add options</u> to the Standard in the worksheet.
- 2. <u>Select all the items</u> in the Standard.
- 3. Click Send To on the Item toolbar and select Custom Catalog Wizard.
- 4. In the **Send to Custom Catalog Wizard**, select the Standard that you wish to redefine.


- 5. Click Next.
- 6. Click Next on the Saving Your Work dialog.
- 7. Type in the exact same name as the Standard you are replacing.
- 8. Type in a description.
- 9. Check Replace the contents of the existing Standard.



- 10. If necessary, assign an Alias to all the components of the Standard.
- 11. Click Finish.

12. Go to the Projects tab in Explorer and click 🥨.

Notice that the Standard will now have the options in it.

To redefine a standard from the Explorer bar:

- 1. Go to the **Projects Tab** in **Explorer** and <u>add or change the options</u> to one line of your Standard.
- 2. Click on the Standard line and do an <u>Update against Catalog</u> in the worksheet.

You should see that the Standard price has changed and the options have been added to that line in the Standard.

#### Save as single level worksheet

When you are ready to order items that are in your worksheet, they must be listed as individual items, with no outline or standard levels.

To create a new worksheet with items from standards/outline levels listed individually:

- 1. From the File menu, select Save As Single Level Worksheet.
- 2. In the Save in field, choose the disk/folder where you want to save the worksheet.

In the File name field, type in the name of the file and press ENTER.

Note: Type in a meaningful name so you can easily link this worksheet to the original one. For example, if the original worksheet is named Client1, name the single-level worksheet Client1\_order.

Notice that the new worksheet has items listed individually, with each line no longer in yellow.

This way, you still have the original worksheet with the Standard lines in it. If you ever make changes to the Standard, you just need to **Save As Single Level Worksheet** again to create a new worksheet with items listed individually.

Note: Saving as a single level worksheet is different from <u>flattening a standard</u> or <u>breaking a standard</u> <u>link</u>, which breaks the link to the custom catalog.

#### **Print multiple levels**

A quick way to print all the levels (Standards or Outline) in a worksheet is to use the Print Levels tool. Before you print you will need to <u>set the default printer</u> using the Print Setup dialog.

- 1. From the menu select File, Print Levels.
- 2. In the **Print Levels** dialog box, select which worksheets you wish to print. For each line checked you will have one printout.
- 3. Check whether you also want to print the <u>cover page</u> and/or the <u>report</u>.
- 4. Click Print.

Note: The title on each sheet will be the name of the Standard or the Outline level.

## Show levels in Explorer

	Work	statio	ns.sp	94 (mod	ified)	-			•	×	
🚮 Тур	A : Typ	pical A	Works	tation		~			Leve	el 🖕	
ltem	1	8	1	Mfg	Cat	Qty	Part Number	Part Descr	<b>{</b> <sup>4</sup> }	Step In	
[1]	۲			ALS	A30	2	Y03624P	Base Panel Fr 36HX24W Pnt	Ռ	Step Qut	
								Skipped Optio	13	Print Levels	
2	-			ALS	A30	1	Y03630P	Base Panel Fr 36HX30W Pnt	d To	Show Levels in Explorer	
								Skipped Option	n		

Click the Level dropdown on the header then select Show Levels In Explorer.

The Explorer bar's <u>Projects tab</u> highlights the level you are currently in (whether you are in the worksheet or Standard level).

# **Outline levels**

Outline levels allow you to better organize your worksheet. For example, you would use an outline level for a floor, building or room name. Within each outline level you would have your parts and <u>standards</u>. When you print the worksheet, you can show only the outline levels to be able to quickly look at pricing per level.

You can create outline levels from the worksheet or from a CAP Designer drawing. In CAP Designer, you would create CAP bounds and this will be represented in 2020 Worksheet as an outline level. See the Bounds section in the CAP Designer online help for details.

To create an outline level in 2020 Worksheet:

1. Click Insert on the Item toolbar then select **Outline level**.

2. A green line is inserted in your worksheet, representing an outline level.

	Untit	led1.s	p4 (m	odified)	n -			<b>▼</b> ×
Wor	ksheel	:				~		Level 🖕
Item	1	8	1	Mfg	Cat	Qty	Part Number	Part Descrip
[1]							New Outline Level	

3. Click in the **Part Number** column to change the outline level name, if necessary.

You can use the same commands available to Standards for Outline levels. See the following topics under the <u>Standards</u> section:

- View the contents of a Standard to step into an outline level to view and modify its contents.
- Step out of a Standard
- Save as single level worksheet
- Print multiple levels
- Show levels in Explorer

To delete an outline level, see <u>Delete an item</u>.

Note: You can also create an outline level by breaking a standard link.

# **Panel configurations**

Panel configurations are usually created and modified in CAP Designer so that they are updated automatically in the design. However, Worksheet also gives you the option to create and modify panel configurations.

You can either:

- Use the Custom Catalog Wizard to create a panel configuration and then insert it into the worksheet
- Create and insert a panel configuration without the Wizard

#### Use the Custom Catalog Wizard to insert a panel

- 1. Click Insert I on the <u>Item toolbar</u> then select **Panel Configuration from a Custom Catalog**.
- 2. In the **Custom Catalog Wizard**, click **Panel Builder** to create a new panel configuration.
- 3. Create your panel configuration(s) in Panel Builder. For more information, see the Panel Builder help. Close Panel Builder when done.
- 4. Back in the Custom Catalog Wizard, click **Refresh** to update the custom catalog list.
- 5. Open the custom catalog where you saved the panel configuration, select the appropriate panel configuration width then click **Finish** to insert the item into the worksheet.

Name		Description	^
Cient (     My Par     My Par     According to the second se	ets Rapids office Catalog.cc4 nel Configurations.cc4 ood Panel 48 High coustic 51	Project folders store	
	Acoustic 51 24 Acoustic 51 20	24" Panel Config 20" Panel Config	
	Acoustic 51 36	36" Panel Confin	~
ess Finish to insert the	selected item into the w	orksheet.	

#### See also:

- Modify a panel configuration
- Specify options for a panel configuration

### Create a panel configuration without the Wizard

- 1. From the Tools menu, select Panel Builder.
- 2. Create one or more panel configurations in Panel Builder. For more information, see the Panel Builder help file. Close Panel Builder when done.
- 3. Right-click on the custom catalog where you just added the panel configurations then select **Refresh**.



4. After creating the panel configuration, select a particular width then drag it to the worksheet.



#### See also:

- Modify a panel configuration
- Specify options for a panel configuration

# Modify a panel configuration

Important: A panel configuration is like a standard, with one exception: a panel configuration already inserted in a worksheet is **NOT** linked to its custom catalog.

If you make changes to the panel configuration in the custom catalog, the panel configurations already in the worksheet do not change even if you do an <u>Update against catalog</u>. You will need to delete the existing panel configuration in the worksheet and drag the panel configuration again from the custom catalog to the worksheet.

It is therefore recommended to <u>specify options for the panel configuration</u> only after the panel configuration has been finalized.

1. Right-click on the panel configuration then select **Specify**. Panel Builder opens so you can make your changes.

Note that even if you right-click on a particular width, all panel configuration widths get modified, not just that specific width.



- 2. Make the changes in Panel Builder, save and close Panel Builder.
- 3. Right-click on the custom catalog (.cc4 extension) then select Refresh.
- 4. If you had previously inserted that panel configuration into the worksheet, you will need to delete that panel configuration in the worksheet then drag and drop from the Custom Catalog.

# Specify options for a panel configuration

A panel configuration is represented on the worksheet as a <u>standard</u>. **However**, unlike a standard, a panel configuration already inserted in a worksheet is **NOT** linked to its custom catalog. It is therefore recommended to specify options for the panel configuration only if the panel configuration no longer needs to be <u>modified</u>.

- Untitled1.sp4 (modified) • X Acoustic 51 24 : 24" Panel Config v Level . Item Preview 1 Mfg Cat Part Number 1 5 TEK TLE **KES1524** 0 6 TLE KES1524 TEK 0 7 TLE KTR24 TEK 0 TEK TLE Acoustic 51 24 < > H + + H Worksheet Global Options Cover Page Report
- 1. From the worksheet, step into the standard.

2. Do an Update Against Catalog.

Notice that in the **Complete** column, the Question mark is replaced by the icon.

3. <u>Specify each item</u> one by one or use <u>Global Options</u>.

Note: If you want to display the image in the **<u>Preview</u>** column, you must do an <u>Update Preview image</u>.

# Validate a worksheet

To ensure that you have entered accurate orders, use the **Validate** command. This command checks a worksheet against a set of validation criteria. After running the verification you can view a list of errors encountered. From this list you can flag the erroneous parts or go to the part number in the worksheet.

1. From the Worksheet menu, select Validate.

The **Validate Worksheet** dialog appears. You can resize this dialog or go to the worksheet while this dialog is open.

The dialog lists part numbers in the worksheet that are not valid. You also see the errors on each part number.

Validate W	/orksheet							
	Visu	al Impres	sion Sam	ple.assoc	ciated.vis	ual		Â
	Part Number	Incomplete Options	List Price <= 0	Purchase Price <= 0	Sell Price <= 0	Sell Price <= Purchase Price	Quantity is O	E
	EXHB	•				•		
	Part Number		•	•	•	•		
	<u>CE66</u>	•				•		
	<u>CX66</u>	•				•		
	CTREC3672	•				•		
	DPDABBF3672	•				•		
	USD3072	•				•		
	<u>TC24</u>	•				•		
	<u>TC42</u>	•				•		
11	11101001							
Criteria	3				Flag All	Refresh	Close	<b>)</b>

2. To change the validation criteria, click **Criteria**. In the **Validation Criteria** dialog check the ones you want verified then click **OK**.

The information on the Validate Worksheet dialog will be refreshed automatically.

3. To make corrections, you can either:

- Click on **Flag All** to flag parts that are not valid. Without closing the dialog, make the corrections in the worksheet. Go back to the **Validate Worksheet** dialog and click **Refresh** to update the information.

- Click on a part number to make that part number current in the worksheet. Without closing the dialog, make the corrections in the worksheet. Go back to the **Validate Worksheet** dialog and click **Refresh** to update the information.

4. Click **Close** to close the dialog.

# Visualize a scene or all products in Visual Impression

If the current worksheet was created from a CAP Designer or Giza Designer drawing, you can open Visual Impression to visually specify product and room finishes.

Click the Visualize menu and Select Scene, and then select a scene from Visual Impression.





You can also click a named scene or Entire Design to start Visual Impression.



See also *Define a scene for Visual Impression* in the CAP Designer help file or the Giza Designer help file and the Visual Impression Quick Tour help file.

# **Worksheet links**

Worksheet Links are similar to <u>Standards</u>. You can use Worksheet Links to help create a Total Budget Recap for a job. You can use them to link to other worksheet files.

For example, let's say you want to create a budget for a job with several workstations, panels and lateral files but do not need a drawing. By creating a worksheet for each group of items you can easily add them together using Links.

#### See:

- Insert worksheet links
- Change worksheet links
- Save as single level worksheet
- Delete an item

### **Insert worksheet links**

In the exercise below, you will create a proposal worksheet for client ABC's Mortgage Department. The client wants 6 TypA workstations and 4 TypB workstations. You will use worksheet links in the proposal.

Before starting the exercise, create 2 worksheets:

- 1. Name the first worksheet TypA.sp4. Add a Standard in it.
- 2. Name the second worksheet  ${\tt TypB.sp4}.$  Add a Standard in it.

Exercise - insert worksheet links:

- 1. <u>Create a new blank</u> worksheet. <u>Save</u> the worksheet as ABCProposal.sp4.
- 2. Click <sup>Insert</sup> on the <u>Item toolbar</u> then select **Worksheet Link**.
- 3. In the **Open** dialog box, double-click TypA.sp4 to insert it into your ABCProposal worksheet.

Line item 1 will now have TypA.sp4 inserted and subtotaled.

- 4. Repeat Step 2 to insert another worksheet link.
- 5. Double-click TypB.sp4 to insert it into your ABCProposal worksheet.

Now we can edit the quantity fields of each line:

- 1. Click in the **Qty** column of line item 1 (TypA) and change the quantity to 6.
- 2. Click in the **Qty** column of line item 2 (TypB) and change the quantity to 4.

Here you have a great way to look at and keep track of the project. Your client can see the individual cost of the workstations, the subtotal for the department, and how many of each type of workstation is going in the department.

As long as the individual typical worksheets are correct (have the correct items, brackets, grommets, cantilevers, task lights, etc), you know the bottom line is correct.

See <u>Change worksheet links</u> to view how making a change to the TypA.sp4 standard also changes the file ABCProposal.sp4

## Change worksheet links

Before starting this exercise, make sure you did the exercise Insert worksheet links.

Let's say that the client has seen the sub-totaled proposal, and they would like to make changes to TypA by adding a guest chair.

- 1. In the worksheet ABCProposal.sp4, make line item 1 current by clicking in the part description column for Typical A.
- 2. From the File menu, click Worksheet Link, Open.

This will open the original TypA.sp4 worksheet so that you can add a guest chair. Using <u>Explorer</u>, search for a chair and <u>drag it</u> into the worksheet.

- 3. Save the TypA.sp4 worksheet and close it.
- 4. Verify the changes have been made to ABCProposal.sp4 by checking that the price has increased.

Once client ABC is satisfied with the proposal, you can merge all the furniture items onto one worksheet and create one order. To do this, you need to save the file ABCProposal.sp4 as a single level worksheet. See <u>Save as single level worksheet</u> for details.

# **Contacts**

The 2020 Contacts Manager is a small database that helps you integrate and organize contact information such as customers, vendors and staff.

You can then display this information in your worksheet <u>cover page</u> and <u>reports</u> by selecting the appropriate contact through the <u>Worksheet Properties General tab</u>.

To enter contacts, from the Tools menu, select Contacts.

То:	Do this:
	1. Click the <b>Add New</b> button.
Add a new contact	2. Enter the contact information on the right side of the screen.
	3. Click <b>OK</b> to save your changes.
	<ol> <li>Highlight the contact on the left side of the screen.</li> </ol>
Modify a contact	<ol> <li>Modify the contact information on the right side of the screen.</li> </ol>
	3. Click <b>OK</b> to save your changes.
	1. Highlight the contact on the left side of the screen.
Delete a contact	2. Click <b>Remove</b> .
	3. Click <b>OK</b> to save your changes.

Set a contact as the <b>Prepared by</b> contact in Worksheet Properties.	<ol> <li>Highlight the contact on the left side of the screen.</li> <li>Click Set Default.</li> <li>Click OK to save your changes.</li> </ol>
Import contacts from a comma- separated (.csv) file or an XML file	<ol> <li>Click Import File.</li> <li>In the Open dialog, select the file to import then click Open.</li> </ol>
Export contacts to a comma- separated (.csv) file	<ul><li>6. Click Export File.</li><li>7. In the Save dialog, type in the name of the file then click Save.</li></ul>

See also Edit contact information for the current worksheet only

# Edit contact information for the current worksheet only

You can edit a contact's information for the current worksheet, so that it is different than what is stored in the <u>Contacts</u> database. This feature also allows you to update your Contacts database when you receive a worksheet that has newer contact data.

- 1. Click on the <u>Standard toolbar</u>.
- 2. In Worksheet Properties, click General on the left.
- Click the button beside one of the contact fields.

4. In the Edit Worksheet Contact... dialog, modify the contact information under This Worksheet's Copy.

If you make a mistake and want to copy the information from the Contacts database, click **Copy from Database**.

If you want to copy the information in the current worksheet to the Contacts database, click **Save To Database**.

- 5. Click **OK** in the **Edit Worksheet Contact...** dialog.
- 6. In the **Worksheet Properties** dialog, click **OK** to save and close or **Apply** to save and keep the dialog open.

# **Cover Page**

Cover Page helps you create attractive, informative cover pages for several different uses. Here are a few examples of possible uses for a cover page:

- Approval pages allow an end user to sign off on pricing and information within a specific worksheet for an upcoming project.
- Proposal page for bid purposes on a job, where a dealer could prepare a page that specifies that the information is for estimates only.
- Fax cover pages to send as a fax front page on a worksheet that a user may want to send to a client.
- Interoffice cover to pass information from one department to another within an office. This could serve as a verification that information has been passed from design to sales and then to order entry.

There are infinite ways to customize a cover page. A company or dealer could create a cover page and have everyone in the company use it. Once it is created it can become the default for a dealership to create a consistent look when preparing internal information or presentation for clients.

Cover Page includes an editor and WYSIWYG (What You See is What You Get) preview screen. In Cover Page you can include: company logos, imported graphics, freehand drawing elements and worksheet data that is dynamically updated from a worksheet, such as pricing and customer information from Worksheet Properties.

#### See:

- Edit an existing cover page
- Manage cover page layouts
- Create a new cover page layout
- Apply a cover page layout
- Zoom the cover page
- Print a cover page

### Edit an existing cover page

1. Click the **Cover Page** tab in the <u>Worksheet area</u>.



2. Beside Selected CoverPage, select Plain.



3. Click the Edit CoverPage Layout icon.



This launches the 2020 CoverPage Designer for the default cover page titled Plain.

- 4. See the 2020 CoverPage Designer online help for information on using this program.
- 5. After making changes in 2020 CoverPage Designer, click 2 on the Cover Page toolbar to view your changes.

#### Manage cover page layouts

1. Click the **Cover Page** tab in the <u>Worksheet area</u>.



2. Click the Manage CoverPage Layouts icon on the CoverPage toolbar.



3. In the Manage Cover Page Layouts dialog box you can do any of the following:

То:	Do this:
Create a new cover page layout	Click <b>New</b> to create a blank cover page layout
Create a new cover page layout based on an existing one	See <u>Create a new cover page layout</u> .
Edit a cover page layout	Select the cover page layout then click <b>Edit</b> . The 2020 CoverPage Designer appears. See the 2020 CoverPage Designer help for details.
Rename a cover page layout	Select the cover page layout then click <b>Rename</b> .
Delete a cover page layout	Select the cover page layout then click <b>Delete</b> .
Apply a cover page layout to the current layout	Select the cover page layout then click <b>Apply.</b>

Set a cover page layout	Select the cover page layout then click <b>Set Default.</b>
as default	Notice that the selected layout is now in <b>bold.</b>
Reset the default cover page layout	Click <b>Clear Default</b> .

#### Create a new cover page layout

1. Click the **Cover Page** tab in the <u>Worksheet area</u>.



2. Click the Manage CoverPage Layouts icon on the CoverPage toolbar.



- 3. In the **Manage Cover Page Layouts** dialog box, click **New Based on** to create a cover page layout based on an existing one.
- 4. In the Browse for File dialog, click the + sign beside the CoverPages folder to expand it.

5. Select an existing cover page layout.



- 6. Click OK.
- 7. Enter a unique name for the cover page layout then click **OK**.
- 8. Click Close in the Manage Cover Page Layout dialog.

You will now be able to select the new cover page layout by clicking beside **Selected CoverPage** and then selecting it under **My Cover Pages**.



## Apply a cover page layout

To apply a standard or user cover page layout to the current cover page:

- 1. From the menu, select **Reports**, then **Apply CoverPage** Layout.
- 2. Select the standard or user cover page layout from the list.

Note: A faster way is to click the arrow beside **Selected CoverPage**, then select the cover page layout.



### Zoom the cover page

- 1. In the **Cover Page** tab in the <u>Worksheet area</u>, click the dropdown arrow beside **Zoom** on the Cover Page toolbar.
- 2. Select the level you want to zoom.



#### Print a cover page

You can print a cover page independently or along with product items.

To print the cover page only:

While you in the <u>Cover Page</u> tab, click **File** menu then select **Print**.

To print the cover page with product items:

- 1. Click the Worksheet tab.
- 2. From the File menu, select Print Levels.
- 3. In the Print Levels dialog, check Include the Cover Page.
- 4. Click Print.
  - See also Print reports

# **Reports**

2020 Worksheet's reporting tool allows you to build completely customized internal or external reports. You can do this by creating your own report or customizing report templates.

#### See:

- View a report
- Apply a standard or user report design
- Generate Quick Reports
- Create, edit and manage reports
- Report Designer
- View report pages
- Export a report to PDF
- Print reports

#### View a report

Click the **Report** tab at bottom of the <u>worksheet area</u>.



## Apply a standard or user report design

In the **Report** tab, there are standard report designs (templates) that you may use to create reports. You can also select one of the user reports you created.

1. Click the **Report Designs** drop down on the <u>Report Toolbar</u>.



2. Select one of the standard reports or user reports listed. The report will automatically generate and you will see a preview on the **Report** tab.

## **Generate Quick Reports**

A Quick Report can be generated based on the columns that are turned on in the Worksheet tab.

To generate a quick report, click is on the <u>Report Toolbar</u>.

Note: Once you have run the Quick Report once, it will be available from the **Report Designs** drop down on the **Report Toolbar**.

This quick report can then be customized and renamed.

#### See also:

- View a report
- Apply a standard or user report design
- Create, edit and manage reports
- Report Designer
- Export a report to PDF
- Print reports

### Create, edit and manage reports

The **Manage Report Designs** dialog allows you to create and modify your own report designs. These reports will be stored as user reports.

- 1. Click on the <u>Reports toolbar</u>.
- 2. In the Manage Report Design dialog:

То:	Do this:
	1. Click New.
Create a new	2. Enter a name for the report then click <b>OK</b> .
blank report	2020 Report Designer launches with the new report opened. See the Report Designer help to edit the report.
	1. Click New Based On.
	2. The Browse for File dialog opens.
Create a new report based on an existing one	<ul> <li>Select the report in the Standard Reports directory. If you would like to browse to the User Reports they can be found under: <i>My Documents\CAP\UserReports.</i></li> <li>3. Enter a name for the report then click OK.</li> <li>2020 Report Designer launches with the new report opened. See the Report Designer help to edit the report.</li> </ul>
	Select the report then click <b>Edit</b> .
Edit a report	2020 Report Designer launches with the new report opened. See the Report Designer help to edit the report.
Rename a report	Select the report then click <b>Rename</b> .
Delete a report	Select the report then click <b>Delete</b> .

Apply a report design to the current one.	Select the report then click <b>Apply.</b>
Set a report as default	Select the report then click <b>Set Default.</b> Notice that the selected report is now in <b>bold.</b>
Reset the default report	Click <b>Clear Default</b> .

## **Create a Panel Builder Report**

To generate a report on panel configurations showing Panel Builder elevations and finishes, click **Reports**, **Panel Builder Reports**...

Name	Mfg	Cat	Qty	Width	Description	Details
A66-PNL 42	DMO	DMO 1B2-PNL	22	42	42" A basic 66" panel no wi	<u>Details</u>
A66-WIN-M DMO, DMO, A66	DMO -WIN-N	DMO 1B-PNL -	2	42	42" 66" High Panel with 2 M	<u>Details</u>
A66-WIN-M	DMO -WIN-P		19	42	42" A66-WIN-MB-PNL	<u>Details</u>
A66-WIN-P	DMO	DMO	15	24	24" A66-WIN-PNL	Details
A66-WIN-P	DMO	DMO	17	42	42" A66-WIN-PNL	<u>Details</u>
Include detailer	linforr	ation fol	lowing	reach ele	wation in the report	

This dialog box allows you to:

- Select one or all Panel Builder configurations.
- Insert graphics and finish text on the report or insert graphics with details of options.

Details	
Details	

Obtain more information on reports such as catalog and manufacturer information, effective date of the catalog, project name and long part number description and user-defined logos (Include Header Image).

Choose the configuration(s) you wish to generate a report for, add the options <u>Details</u> you want, check **Include detail information following**... and **Include Header Image**, as you wish, then click **OK**.

### **Report Designer**

You can modify standard reports and also create and edit user reports in the 2020 Report Designer program.

- 1. Click en on the <u>Reports toolbar</u>.
- 2. See the Report Designer help for information on using this program.
- 3. After making changes to a report design, click on the **Reports** toolbar to regenerate the report.

## View report pages

From the <u>Report tab</u> toolbar, use the arrow buttons to view pages in the report:



Or, type the page number in the **Go To Page** box then press Enter:



To zoom in or out, click the **Zoom** icon and select the zoom factor.

æ	•
	Page Width
	Whole Page
	400%
	300%
	200%
	150%
	100%
	75%
	50%
	25%
	Customize

### **Export a report to PDF**

Once you created a report, you can export it to a .pdf file.

1. From the <u>Report tab</u>, click the **Export Report** button on the toolbar.

alias file for customers.sp4						
	4	×	▶  1	<i>1</i> 7 m <sup>2</sup> <b>→</b>		
MExport Report	E					
<b></b>						
			CV	V2 Worksheet		
			<b>C1</b>	vz vvorksneet		

2. In the **Save As** dialog, choose the disk/folder where you want to save the PDF file in the **Save in** field.

In the **File name** field, type in the name of the file and press ENTER.

The exported PDF file will now be in the location you specified.

### **Print reports**

You can print the report independently or with the cover page and worksheet.

To print the report only:

1. From the <u>Report tab</u> toolbar, click



- 2. Select the **Printer**, the **Print range** and the **Number of copies**.
- 3. Click OK.

To print the report with the cover page and worksheet:

- 1. Click the Worksheet tab.
- 2. From the File menu, select Print Levels.

The Print Level dialog will open.

- 3. Check Include the Cover Page and Include the Report.
- 4. Click Print.
# Frame Designer (Giza only)

Many manufacturers have a frame and tile system that you can work with. Your design may start as a drawing or as a specification. During the design process you will need to define the buildup of the frame — this is called a frame design. The design will combine frame designs with the frames and other furniture components to create an order.

A frame design stores the frame type, frame height, and all components for a complete frame. Frame components include tiles, topcap, add-on frames, load bars, and segment kits. Color and option set values can be specified for tiles and top caps.

You can create frame designs using either of the following methods:

- Create a frame design in 2020 Worksheet
- Import frame designs from manufacturer design files, Giza drawings, and design sets created using Frame Designer

Once you have created a frame design, you can add it to the current worksheet.

Note: Frame designs can only be specified for manufacturer libraries which support Frame Designer. A frame design is independent of the frame width.

## See:

- Access the Frame Designer
- Create a frame design
- Modify a frame design
- Print a frame design
- Export frame design sets
- Import frame design sets
- Add frame designs to a worksheet
- Frame Designer preferences

# Access the Frame Designer

- 1. Click on the <u>Worksheet toolbar</u>.
- 2. Select the **Manufacturer** and **Catalog** that you wish to use. The dialogs/choices will vary with each manufacturer.

ame Designs	
Library	
Manufacturer:	100
Catalon:	M
MTX - Affordable Interior System	ns Matrix Series 🛛 🗸
Frame Design Name:	Designer
Description:	

3. Click Designer.

### See also:

- Create a frame design
- Modify a frame design
- Print a frame design
- Export frame design sets
- Import frame design sets
- Add frame designs to a worksheet
- Frame Designer preferences

## Create a frame design

- 1. Click on the <u>Worksheet toolbar</u>.
- 2. In the **Frame Designs** dialog, select the **Manufacturer** and **Catalog** that you wish to use. The dialogs/choices will vary with each manufacturer.
- 3. Click Designer.

The **Frame Designer** dialog displays the **Catalog** selected, the default frame type and size, usually the smallest. If this is the first frame design you are creating for the selected catalog, the **Design name** box is empty.

4. Change the **Frame Type** and **Frame Height** to a standard panel height, for example 61".

🖡 Frame Designe	r [KL5]	
		WIRE-PAINT TC 💽 61.00 💽 😴
Define Preview	вом	
Stack-on	[]	
12	12H FABRIC I	
19	12H VENTILATED 12H GLASS 12H SLAT ALUMINUM 12H FABRIC NON-TACKABLE	
24		
	Inside	Outside

- 5. Use the Tile drop down menus to pick the tiles required.
- 6. Click the **Color** button to the right of each tile dropdown to specify color for tiles and topcaps.



- 7. In the text box to the right of the Color button, you can specify the **Option Set** value.
- 8. To place a stack-on or segment kit in a slot, right-click in the **Stack-on** location of the frame. Select an available kit from the submenu.



Each manufacturer will have different items that can be stacked. If the Stack-on frames menu is grayed out you cannot add any more.

To remove an add-on frame, right-click on it then click the **Remove** command on the submenu.

To change an add-on frame, right-click on it then select another add-on frame.

- 9. Click the **Preview** tab to see a front and back elevation of the frame.
- 10. Click the **BOM** tab to review the part numbers of the tiles selected.
- 11. Save the configuration by clicking either the **Save** or **Save** as icon on the toolbar.
- 12. In the Save As dialog, type a **Design Name** (maximum 15 characters, no symbols) and a **Description** (maximum 20 characters).

If a design of the same name already exists, 2020 Worksheet will prompt you to overwrite the existing design.

13. Click OK.

Notice that the design name is now displayed.



14. Close the **Frame Designer** dialog when finished by clicking the red X at the top of the dialog.

In the **Frame Designs** dialog, notice that the **Name** of the design you created is now available under **Frame Design**.

Ibrary Nanufacturer:	
KIM - Kimball Office	×
atalog:	
KLS - CETRA PANELS & RELAT	TED ITEMS
rame besign lame: FF v Description:	Designer
abric 2 Side	

- 15. Click the **Update** button to create all the frame design sizes for that configuration.
- 16. Click **OK** when you see the confirmation message.

2020 Worksheet updates all frame designs in the current 2020 Worksheet. During the update, if a frame design does not exist, its dependent items are removed from the project.

The frame design is accessible from the current worksheet only. If you wish to use it in other worksheets, you will need to <u>export it</u> to a design set then <u>import the design set</u> into another worksheet.

#### See also:

- Modify a frame design
- Print a frame design
- Add frame designs to a worksheet
- Frame Designer preferences

Note: You can also create a new frame design by clicking in the **Frame Designer** dialog. You will have to enter the design name and description right away. Follow the same steps as above.

# Modify a frame design

Note: For instructions on creating a frame design, see Create a frame design.

1. <u>Access the Frame Designer</u>.

To access the frame design right away, select the name in the Frame Designs dialog

Frame Designs	
Library Manufacturer:	
KIM - Kimball Office	~
Catalog:	
KLS - CETRA PANELS & RELATED I	TEMS - 10/16/06 I 💌
Frame Design Name:	Designer
Fabric 2 Side	
Upd	ate Cancer

2. In the Frame Designer dialog, select the frame design Name.



- 3. Make modifications to the design as necessary.
- 4. Save the configuration by clicking 🔲 on the toolbar.

If you want to create a new frame design based on the current one, click Save as

- 5. Close the **Frame Designer** dialog when finished by clicking the red X at the top of the dialog.
- 6. Click the **Update** button to create all the frame design sizes for that configuration.
- 7. Click **OK** when you see the confirmation message.

2020 Worksheet updates all frame designs in the current 2020 Worksheet. During the update, if a frame design does not exist, its dependent items are removed from the project.

### See also:

- Print a frame design
- Export frame design sets
- Import frame design sets
- Add frame designs to a worksheet
- Frame Designer preferences

Note: To delete a frame design, select the frame design name then click **Delete** . To print a frame design, see <u>Print a frame design</u>.

## Print a frame design

- 1. Access the Frame Designer.
- 2. In the Frame Designer dialog, select the frame design name.



- 3. Click the Print button.
- 4. Select the **Printer**, the **Print Range**, and the **number of copies**.
- 5. Click OK.

This will print a page showing the front and back elevation of the frame.

### See also:

- Create a frame design
- Modify a frame design
- Export frame design sets
- Import frame design sets
- Add frame designs to a worksheet
- Frame Designer preferences

## **Export frame design sets**

You can export frame designs so that they can be used in other worksheets or Giza designs.

- 1. After <u>creating</u> or <u>modifying</u> frame designs, click
- 2. In the **Export Design** dialog, click **New**.
- 3. Type a name for the **Design Set**.

🖗 Frame De	signer (KL5		- C X
	FF FF	- X - HWIRE-PAINT	• 61.0X • 💖
Define Pre-	view BOM		
1			_
	Export Desi	lgn	×
	Design Sets	default • New	
	Designs	IFF Contraction	1
Stack-on	10000	FS	
		Close New Design Set	
		Design Set PADCPHONECT	UK
			Cancel
	24 24H	FABR • 24H FABR •	
		Inside Ou	Aside

- 4. Click OK.
- 5. Pick all the frame designs you wish to export.

Use the SHIFT or CTRL keys to select more than one frame design.

6. Click Export.

This frame set can be used in other worksheets or Giza designs. When you import Giza Designer projects, frame designs defined in the project are also imported as <u>Standards</u>.

## See also:

- Print a frame design
- Add frame designs to a worksheet
- Frame Designer preferences

## Import frame design sets

You can import design frames from manufacturer design files, Giza projects, and other 2020 Worksheet projects.

Some manufacturers provide special frame designs. These are installed with the manufacturer's libraries.

## To import a frame design set into a Worksheet:

- 1. Access the Frame Designer.
- 2. Click 💻
- 3. Beside Import From, select Design Set.

You can also select Giza Project or Manufacturer Design file.

4. Select the **Design Set** you wish to import from.

If you chose **Giza Project** in the previous step, select the **location** of the Giza drawings and the **project** which contains the frame designs.

5. Select the frame **designs** you need.

Use the SHIFT or CTRL keys to select more than one frame design.

Frame Designer [KL5]	~	
	• • • • • • • • • • • • • • • • • • •	IRE-PAINT TC 🔹 30.00 💽 💇
Define Preview BOM	0	
Import De	ign	
Import From	Design Set	• Import
Design Set	ABC PROJECT	Close
Designs (	T.	
	13	
Stack-on		i
24		
	Inside	Outside

6. Click Import.

7. Click **Close** when you are finished.

Now you will be able to use the frame designs in the worksheet or in a Giza Design.

### See also:

- Print a frame design
- Add frame designs to a worksheet
- Frame Designer preferences

## Add frame designs to a worksheet

After creating the frame designs you will need to add them to the current worksheet.

- 1. Click Click on the <u>Item toolbar</u> then select **Frame Design**.
- 2. In the Import Frame Design dialog, select the Manufacturer and Catalog.
- 3. Select the Frame Design Name.
- 4. Select a width.
- 5. Click Insert.
- 6. Continue to add frames of different configurations and sizes.
- 7. Click Close.

Your worksheet will have a <u>Standards</u> line for each Frame Design size you added.

- 8. If necessary, change the quantity of the frame designs.
- 9. Click the Worksheet Title dropdown to see a list of the Frame Designs.
- 10. Select a frame design to see the details.

Worksheet : I	Frames for First P	loor	~		
Worksheet :	Frames for First P	loor		rt Number	
24 Wide	FF: 24 Wide FF FS: 36 Wide FS			Vide FF	36 Wide FF
3 48 Wide	FS : 48 Wide FS		-	Vide FF	24 Wide FF
3	KIM	KL5	36 \	Vide FS	36 Wide FS
4	KIM	K15	48 \	Vide FS	48 Wide FS

A frame design is a Standard and will open the same way.

Item	10	A Mfg	Cat	Part Number	Part Description	Qty	List	Ext	List
1]	4	KIM	KL5	AF3661SHP	CETRA,35WX61H,PANEL,SECTIONAL FRAME,HARDWIRE,PAINT TOP CAP	1	\$ 509.00	\$	509.00
					Skipped Option				
				***	Skipped Option				
					Skipped Option				
			-	in a	Skipped Option				
		KIM	KL5	AI3624N	FRAME, INSERT TILE, FABRIC	1	\$ 115.00	s	115.00
					Skipped Option				
	9	KIM	KL5	AI3624N	CETRA,36W/24H,SECTIONAL FRAME,INSERT TILE,FABRIC	1	\$ 115.00	\$	115.00
					Skipped Option				
		KIM	KL5	AI3619N	CETRA,36WX19H,SECTIONAL FRAME,INSERT TILE,FABRIC	1	\$ 100.00	\$	100.00
					Skipped Option				
	3	KIM	KL5	AI3619N	CETRA,36WX19H,SECTIONAL FRAME,INSERT TILE,FABRIC	1	\$ 100.00	\$	100.00
					Skipped Option				
	3	KIM	KL5	AI3612N	CETRA,36WX12H,SECTIONAL FRAME,INSERT TILE,FABRIC	1	\$ 100.00	\$	100.00
				100	Skipped Option				
		KIM	KL5	AI3612N	CETRA,36WX12H SECTIONAL FRAME INSERT TILE,FABRIC	1	\$ 100.00	\$	100.00
					Skipped Option				
		KIM	KL5	36 Wide FF	36 Wide FF			\$	1,139.00

Note: Option set values are stored in the Alias3 column.

For more on working with Standards, see <u>Standards</u>.

## See also:

- Modify a frame design
- Print a frame design
- Export frame design sets
- Import frame design sets
- Frame Designer preferences

## **Frame Designer preferences**

- 1. Access the Frame Designer.
- 2. Click the Preferences button.



- 3. Make changes to the **Design** and **Report** preferences.
- 4. Click **OK** to save your preferences and close the dialog box.

Note: If you want to load the default configuration, click **Default**.

## **Design preferences**

In this area, you can configure frame design options.

Check box	Description
Clear option set	When checked, the <b>Option set</b> field is cleared when you select another tile on the <b>Define</b> tab.
Select default color	When checked, the color is changed to the default color of the new tile when you select another tile on the <b>Define</b> tab.
Include color	When checked, 2020 Worksheet includes color in the comparison for similar designs.
Show controls only	When checked, 2020 Worksheet displays the tile list, color button, and Option Set box only for the active slot on the <b>Define</b> tab.

## **Report preferences**

In this area, you can select the details you wish to display in the BOM tab, Preview tab, and the Frame Layout.

Field	Description
Translated partcodes	When checked, exact product numbers are displayed on the BOM tab and printed in the Frame Layout. Also, Frame Width is available. When cleared, the Frame Layout and BOM tab display the product number formulae.
Frame Width	The value specified in this box is used for evaluating the product number formulae. Frame Designer does not check if the product number displayed is available in the library.
Element names	When checked, product descriptions are printed in the Frame Layout report.
Element heights	When checked, product heights are printed in the Frame Layout report.
Element part codes	When checked, product numbers are printed in the Frame Layout report.
Element options	When checked, option sets are printed in the Frame Layout report.

Click **Font** to select the font for text on the **Preview** tab.

# **Command reference**

This section lists commands available through the various menus. All commands are already referenced by their respective tasks in this help file. The following topics give you a brief description of menus and commands and provide links to corresponding topics.

- 🕨 <u>File menu</u>
- 🕨 <u>Edit menu</u>
- 🕨 <u>View menu</u>
- 🕨 <u>Item menu</u>
- Worksheet menu
- Reports menu
- Visualize menu
- Tools menu
- 🕨 <u>Help menu</u>

## File menu

Command	Shortcut	Description	Help topic
New	Ctrl+N	Create a new worksheet	New blank worksheet
New Worksheet Wizard		Create a new worksheet using the Worksheet Wizard	New worksheet using the Wizard
Open	Ctrl+O	Open a worksheet	Open a worksheet

Open Recent Worksheet		Open a file you recently worked on	Open a worksheet
Close	Ctrl+F4	Close the current worksheet	Close a worksheet
Close All		Close all open worksheets	Close a worksheet
Save	Ctrl+S	Save the current worksheet	Save a worksheet
Save As		Save the current worksheet under a different name	Save a worksheet
Save As Visual Worksheet		Save an associated worksheet as a visual worksheet	Associated-visual and visual-only worksheets
Save As Classic Worksheet		Save an associated or a visual worksheet as a classic worksheet	Associated-visual and visual-only worksheets
Save As Single Level Worksheet		Create and save a new worksheet with items from standards/outline levels listed individually.	Save as single level worksheet
Save All		Save all open worksheets	Save a worksheet
Purge		Purge a worksheet to control its size	Purge a worksheet
Project Management	Ctrl+M	Edit <u>project notes</u>	Manage projects

Project Properties	Ctrl+Enter	Edit project template settings	Project templates
Worksheet Properties	Alt+Enter	Edit Worksheet properties: title, customize column settings, page header and footer setup and price adjustments	Worksheet properties
Worksheet Link		Insert links to other worksheet files	Worksheet links
Print	Ctrl+P	Print the current worksheet	Print a worksheet
Print Levels		Print the current worksheet and/or items within standard or outline levels. From here you can also print the cover page and the report.	Print multiple levels
Print Preview		Preview the current worksheet before printing	Preview before printing
Print Setup		Select the default printer to be used when printing	Set the default printer
Page Setup		Set the page margin, the header and footer's distance to frame, the worksheet appearance, page orientation and centering	Page Setup

Page Header/Footer	Customize the header and footer when printing a worksheet	<u>Header / Footer</u>
Send	E-mail the current worksheet	E-mail a worksheet
Merge	Combine two or more worksheets into one	Merge worksheets
Import Center	Import data from other applications into the current worksheet	Import data
Export Center	Export the current worksheet to different file formats	Export data
Convert	Export multiple worksheets at one time to OFDA XML or CAPSIF. You can also convert a Giza User Library to a Custom Catalog.	Convert data
Exit	Close the 2020 Worksheet program. If one or more worksheets are on screen when using this command and some were not saved, the program asks you to Save ( <b>Yes</b> or <b>No</b> ) or to <b>Cancel</b> the <b>Exit</b> command.	

# Edit menu

Command	Shortcut	Description	Help topic
Undo	Ctrl+Z, Alt+Backspace	Undo an action. The drop down allows multiple steps to be undone at one time.	Undo an action
Redo	Ctrl+Y, Ctrl+Backspace	Redo an undone action. The drop down allows multiple steps to be redone at one time.	Redo an action
Cut	Ctrl+Shift+X	Cut selected item or if nothing is selected, the current item	Cut, copy and paste an item
Сору	Ctrl+Shift+C	Copy selected item or if nothing is selected, the current item	Cut, copy and paste an item
Paste	Ctrl+Shift+V	Paste the last items that were cut or copied	Cut, copy and paste an item
Select		Select any of the following: all, flagged, locked, complete or incomplete items. You	<ul> <li><u>Select items</u></li> <li><u>Select flagged,</u></li> <li><u>locked, complete or</u></li> <li><u>incomplete items</u></li> </ul>

		can also select by criteria.	Select by criteria
Clear Selection	Esc	Clear selected items	Select items
Invert Selection		Select items that were not selected and clear selected items	Select items
Find	Ctrl+F	Find any string in the worksheet	Find text in a worksheet
Replace	Ctrl+R	Replace an existing value with a new one	Find and replace an item
Find/Replace Again	F3	Run Find or Replace again	
Go To	Ctrl+G	Go to a specific line and column in the current worksheet	Go to a specific line and column
Assign		Fill in cell values in the current worksheet	Quickly fill in cell values (Assign)
Block Assign		Copy the options and/or attributes of one item to other items on the worksheet	Copy options and attributes (Block Assign)

Column Copy	Copy values from one column to another	Copy values from one column to another
Break Custom Catalog Link	Break the link to the custom catalog	Break custom catalog links
Flatten Standard or Outline Level	Flatten the Standard or Outline level so that all its components are listed as individual items in the worksheet	Flatten a Standard
Convert to Custom Item	Convert the current item to a custom item. All options will be converted to ISF attributes	Manufacturer- specific information

Convert B2B to OEM	Convert items from their B2B codes back to the regular MFR codes	
Manufacturer Specific	Convert to Steelcase Special, Haworth Special or Haworth Customer's Own Material	Manufacturer- specific information
Option Clipboard	Access Option Clipboard commands	Option Clipboard

## View menu

Command	Shortcut	Description	Help topic
Full Screen	Ctrl+Alt+V	Turns Full Screen View on or off	Full screen view
Menu Bar		Turns Menu bar on or off	Menu bar
Status Bar		Turns Status bar on or off	<u>Status Bar</u>
Caption Bar		Turns Caption bar on or off	Caption Bar

Toolbars	Turns toolbars on or off	Show or hide a toolbar
Explorer Bars	Turn Explorer bar tabs on or off	Show or hide Explorer bar tabs
Task Pane	Show or Hide the Task Pane; access a view in the Task Pane	Access the Task pane
Preview Bar	Show or hide the Preview pane	Preview a product
Worksheet	View the Worksheet tab of the Worksheet area	Worksheet Tab
Global Options	View the Global Options tab of the Worksheet area	Global Options
Cover Page	View the Cover Page tab of the Worksheet Area	Edit an existing cover page
Report	View the Report tab of the Worksheet area	View a report
Rows	Turn rows on or off in a worksheet	Show or hide rows

Columns	Access column commands	Customize columns Resize columns Sort records by column
Levels	Access commands specific to Standards or Outline levels	View the contents of a standard Step out of a Standard Print multiple levels Show levels in Explorer
Templates	Access Worksheet Template commands	Apply a template to a worksheet

## Item menu

Command	Shortcut	Description	Help topics
Insert		Insert a row in the worksheet	Add a product line Insert blank options and attributes Insert worksheet links Reuse a Standard from a custom catalog Outline levels

			Add frame designs to a worksheet Price Adjustments Insert Subtotal Manually
Delete	Ctrl+Shift+Del	Delete the current row	Delete an item
Move	Ctrl+Shift+UpArrow (Move Up) Ctrl+Shift+DownArrow (Move Down)	Move the current item in the Worksheet	Move an item
Split		Separate one line item into two identical items and split the quantity	<u>Split an item</u>
Flags		Access Flag commands	Flag lines
Locks		Access Lock commands	Lock lines
Properties	Ctrl+Alt+Enter	View all the details of the current item	Item properties

Specify	F8	Add finishes in 2020 Options	Specify - access 2020 Options
Edit Options and Attributes		Add, delete or modify options and attributes	Options, Attributes, Copy options and attributes (Block Assign)
Select Service Parts		Insert service parts in the worksheet	Add service parts
Explore	F9	Open Content tab to the location of the current item	Go to an item's location in Explorer
Send To		Send items to Custom Catalogs, Worksheets, and Drawings	Add items into a custom catalog from a worksheet Send To a Worksheet Send To a Drawing

# Worksheet menu

Name	Shor	Description	Help topic
	tcut		
Consolidate		Merges Worksheet	Consolidate identical items
Update Against Catalog	Ctrl+ U	Updates all or selected items against the Manufacturer or Custom Catalog	Update Against a Catalog
Update Against Worksheet		Updates items against a selected Worksheet by product number or tag	Update against a worksheet
Update Preview Images		Updates preview images of items in the Worksheet	Update preview images
Apply Discount	Ctrl+ D	Opens the Discount dialog box	Discounts
Apply Schedule		Apply discounts from a saved discount schedule to the current worksheet	Apply Saved Discount Schedules
Price Adjustments		Insert a price adjustment	Price Adjustments
Validate		Check items on the worksheet for invalid	Validate a worksheet

	pricing, incomplete options or other specified criteria	
Recalculate	Refreshes the Grand Total amounts	Recalculate the Grand Total
Frame Designs	Launches Giza Frame Designer to configure frame and tile products if the Automation is available	<u>Frame Designer</u>
Global Options	Access Global Options commands. These are accessible only if you are in the Global Options tab.	<u>Global Options</u>
Show Associated Drawing	If the current worksheet is associated to a drawing, opens AutoCAD and loads the associated drawing	Associated worksheets

# **Reports menu**

Command	Description	Help topic
Create Quick Report	Creates a quick report based on the columns displayed in the worksheet	Generate Quick Reports
Panel Builder Report	Creates a report of one or more Panel Builder configurations with graphics only information or with detailed options information	<u>Create a Panel Builder Report</u>
Edit Report Design	Edit the active report in the Report Designer	Report Designer
Manage Report Designs	Create, edit, and manage your report designs	Create, edit and manage reports
Refresh the Report View	Refreshes report view to show any changes in report design or content of the current worksheet	Report Designer
Apply Report Design	Shows the available standard and user report designs that can be applied	Apply a standard or user report design

Edit CoverPage Layout	Edit the cover page layout in 2020 CoverPage Designer	Edit an existing cover page
Manage CoverPage Layouts	Create, edit, rename or delete cover page layouts. Set a cover page layout as default or apply it to the current cover page.	Manage cover page layouts
Refresh the Cover Page View	Refresh the cover page to show any changes in cover page design or content of the current worksheet	Edit an existing cover page
Apply CoverPage Layout	Shows the available standard and user cover page layouts that can be applied	Apply a cover page layout

# Visualize menu

Command	Description	Help topic
Select scene	To start Visual Impression and select a scene that was created in CAP Designer or Giza Designer	Visualize a scene or all products in Visual Impression
Scene	To select a CAP Designer or a Giza Designer scene in Worksheet to start Visual Impression	

# **Tools menu**

Command	Shortcut	Description	Help topic
Preferences		Set Worksheet preferences	Preferences
Contacts		Add and edit contacts in the Contact database	<u>Contacts</u>
Visual Impression		To launch Visual Impression to visualize scenes or all products	Visualize a scene or all products in Visual Impression
Visual Materials		To launch Visual Materials to apply and manage color/texture samples from the generic, supplier or manufacturer database for use in Visual Impression	Visual Materials in Visual Impression help
Report Designer		Open 2020 Report Designer to create and edit reports	See 2020 Report Designer help
CoverPage Designer		Open 2020 CoverPage Designer to create and edit cover page layouts	See 2020 CoverPage Designer help
-----------------------	-----	--	----------------------------------
Panel Builder		Launch Panel Builder to create panel configurations	See Panel Builder help
Search	F11	Search the manufacture catalogs for a part by part number or description	Search for products
Compare	F12	Compare two or more worksheets to determine reusable, excess and new product	Reconfiguration projects

Manufacturer Specific	Run the Steelcase Style Number Conversion Wizard or the Global Order Entry Field Import	See the Help file on 2020 Worksheet Manufacturer-Specific Information.
User Defined	Contains user- defined commands. Click <b>Customize</b> to add a menu item and associate it to an executable file.	

## Help menu

Command	Shortcut	Description	Help topic
Topics	F1	Open the 2020 Worksheet online help	
What's New		Open the What's New window where you can read about and	<u>What's new</u>

	download software and manufacturer catalog updates.
User Guide	Open a PDF version of the online helpView or print the User Guide
Release Notes	To read notes about the current release
www.2020technologies.com	View the 2020 Technologies website
Diagnostics	TroubleshootDiagnosticsand repairdamagedfilesdamaged
Check for Software Updates	To view updates for your system, view update descriptions and download

	and install updates	
Check for Catalog Updates	To view manufacturer catalogs updates, view update descriptions and download and install updates	
About 2020 Worksheet	Displays the 2020 Worksheet version number	Software version (About 2020 Worksheet)

## **Manufacturer-specific information**

The following Worksheet features/commands apply to certain manufacturer product lines only. Refer to the appropriate topic in the help file on 2020 Worksheet Manufacturer-Specific Information.

- Global Order Entry
- Convert to Steelcase Special
- Convert to Haworth Special
- Convert to Haworth's Customer Own Material
- Steelcase Style Number Conversion Wizard