2020 Worksheet User Guide

Table of Contents

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 New worksheet using the Wizard.
- Open an **existing** worksheet from one of your projects folders.
- Open a **recently** used worksheet from one of your projects folders.
- Start with a **blank** worksheet 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 context menu

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.

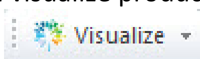
Associated-visual and visual-only worksheets

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  on 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 

- 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).

- 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.

Item	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.

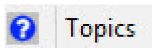
Item	non-Plan Ct	Plan Ct	Qty	List	Ext List
[1]	2	8	10	$ 200.00	$ 2,000.00

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.

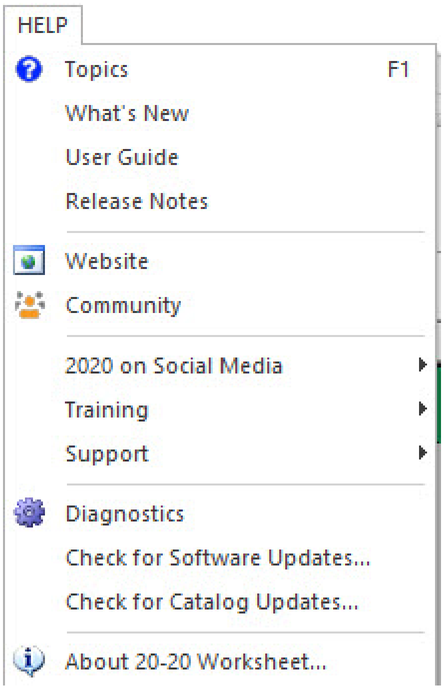
- You cannot edit the Mfg, Alt Mfg, Cat and Part Number
- You cannot split items
- When deleting an item, you will see a warning message
- You will not be able to flatten outline levels and standards
- If you have locks in a worksheet, they will be removed when you save the worksheet
- When you cut or 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 - **Topics** option/icon 

takes you to the Contents page of this help file.



Topics

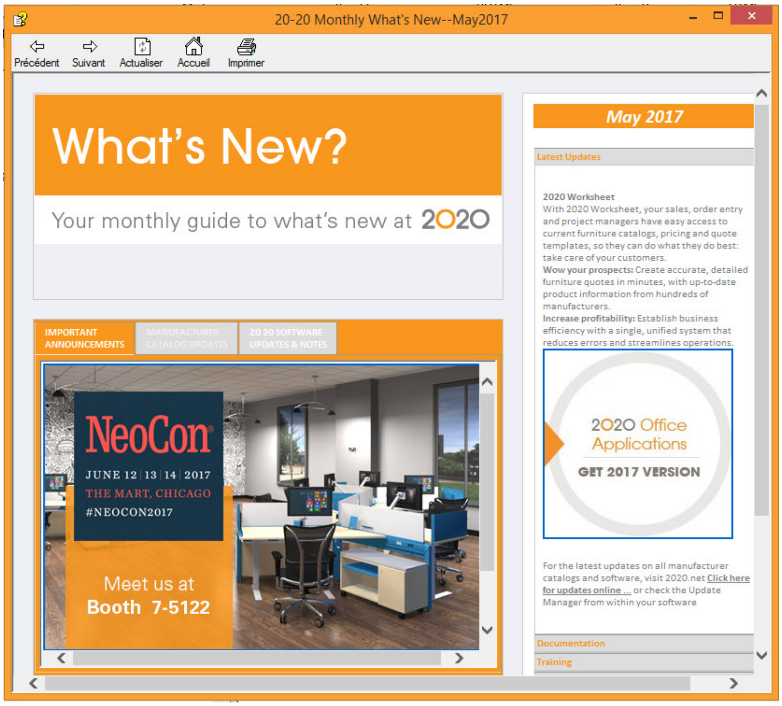
This option opens the topics of the help file you are in right now.

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 Check for software updates, Check for catalog updates
- download PDF versions of the 2020 Technologies commercial software user manuals
- 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

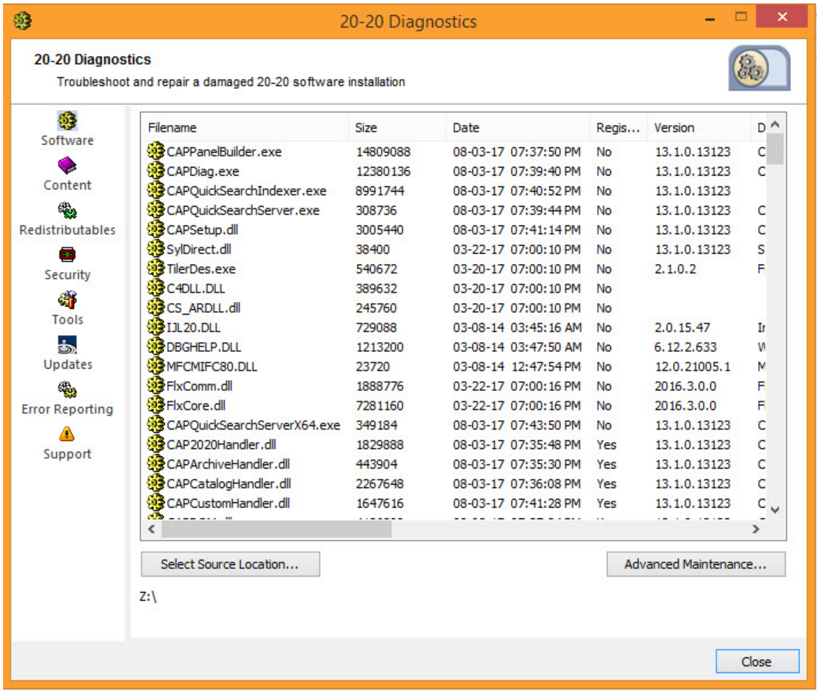
To read notes about the current release, from the **Help** menu, select **Release Notes**.

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.



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 Help  link/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.

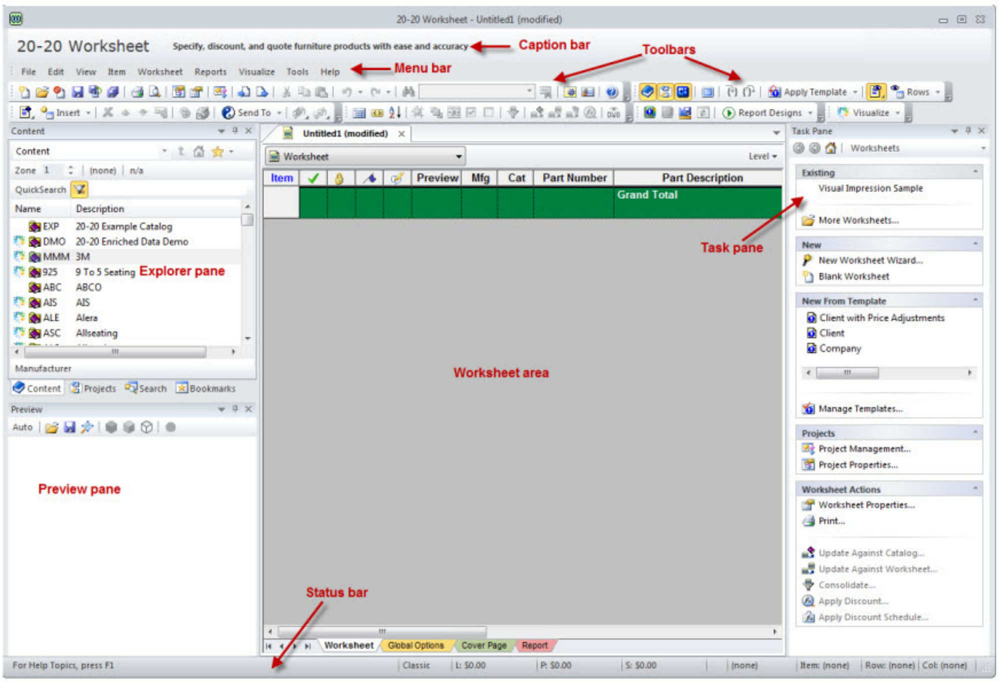
For help on the Software Manager click on the Help  link/icon at the bottom right of the window.

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.



- Caption bar
- Menu bar
- Toolbars
- Explorer pane
- Preview pane

- Worksheet area
- Task pane
- Status bar

As in any standard Windows application, you can use context menus 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 caption bar) 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 Command reference:

- File menu
- Edit menu
- View menu
- Item menu
- Worksheet menu
- Reports menu

- Visualize
- Tools menu
- Help menu

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
- Item
- Worksheet
- Report
- Visualize
- Help

Show or hide a toolbar

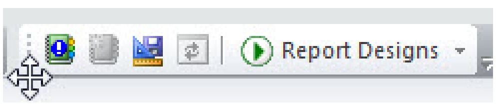
1. Right-click anywhere in a toolbar area and then mouse over **Tool Bars**.
2. Select the toolbar name to toggle the toolbar on or off.

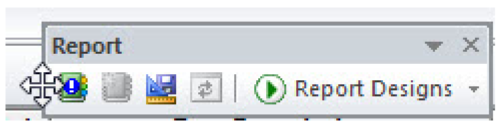
   If it is off (no  next to the name), click it and the toolbar will appear on your screen (a  will also appear next to its name). Selecting it again will turn it off.

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.

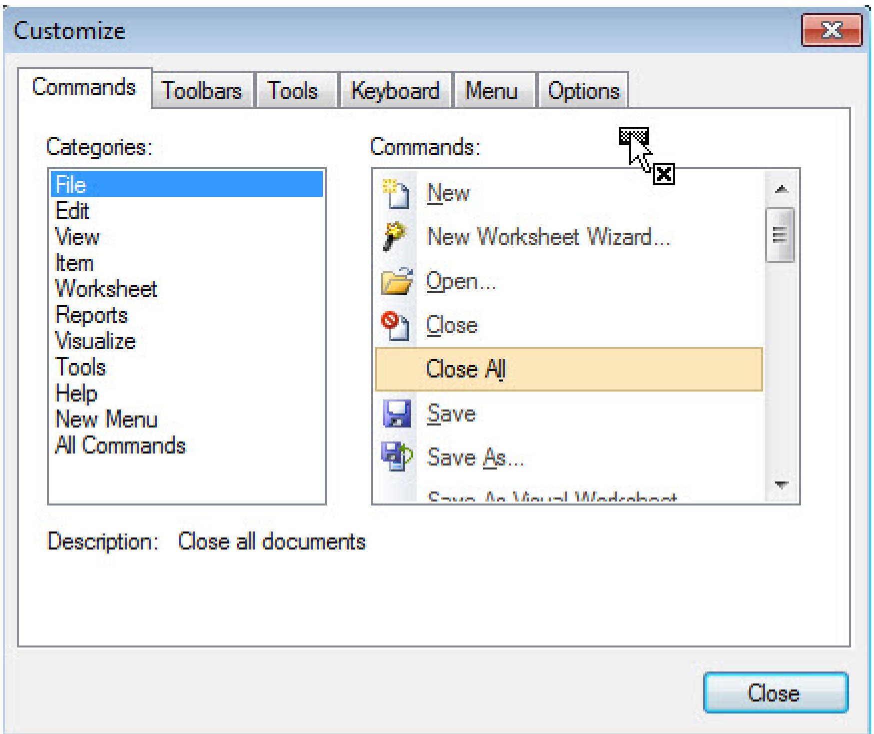




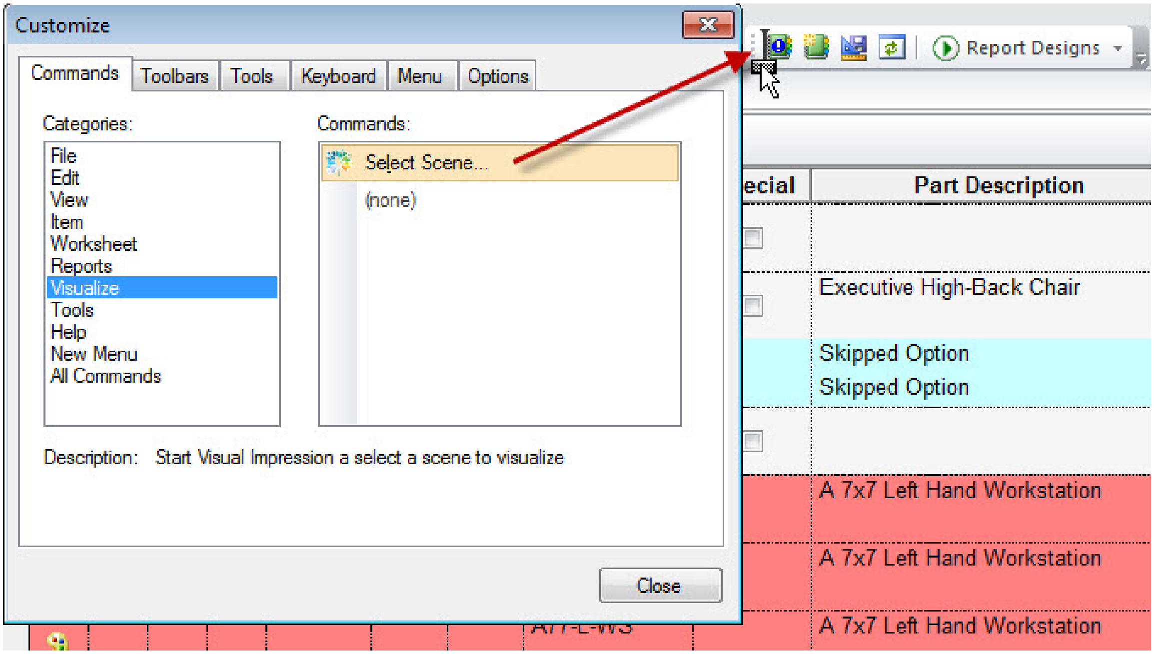
Add and remove buttons

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



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.



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.**

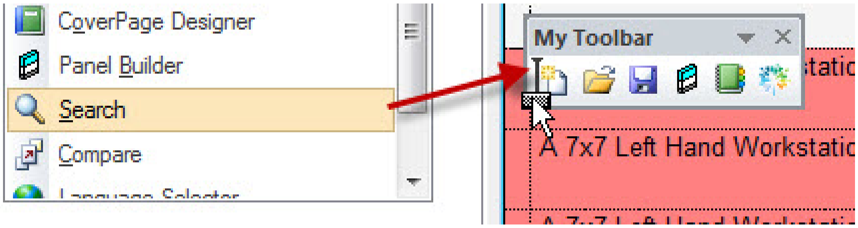
Note: You cannot reset a custom toolbar.

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.
4. 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.

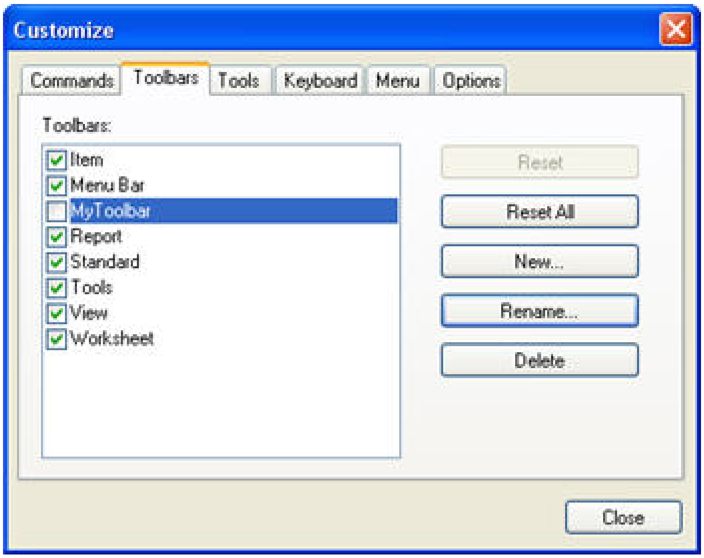


8. Click **Close** to end.

See Delete a custom toolbar.

Delete a custom toolbar

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



4. Click Delete.
5. Click Close.

Standard

Icon	Name	Shortcut	Function
	New	Ctrl+N	Create a new worksheet
	Open	Ctrl+O	Open an existing worksheet
	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
	Print	Ctrl+P	Print the current worksheet
	Print Preview		Preview the current worksheet before printing
	Project Properties	Ctrl+Enter	Edit project template settings
	Worksheet Properties	Alt+Enter	Edit Worksheet properties: title, customize column settings, page header and

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

	Quick Find		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
	Contact Manager		Add/edit contacts.
	Help	F1	Open the 2020 Worksheet Help file

View

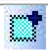
Icon	Name	Shortcut	Function
	View Contents		Display or hide the Content tab of the Explorer pane.
	View Projects		Display or hide the Projects tab of the Explorer pane.
	View Task Pane		Display or hide the Task Pane.

	Full Screen View	Ctrl+Alt+V	Turns Full Screen View on and off.
	Step In		Display the products in a Standard or Outline Level.
	Step Out		Display the Standard or Outline Level.
	Apply Template		Opens a drop-down menu to access the **Manage Template** 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 options on or off.
	View Attributes	Ctrl+Alt+A	Turns the attributes on or off in a worksheet
	View worksheet Links	Ctrl+Alt+L	Turns the worksheet links on or off in a worksheet
	View Custom	Ctrl+Alt+S	Turns the Standards on or off in a worksheet

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

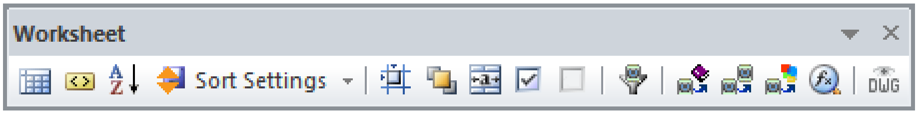
Item

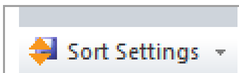
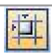
Icon	Name	Shortcut	Function
	Insert Product	Ctrl+Shift+P	Add a product line to the Worksheet. Click and hold the button to open a flyout menu which contains all other insert options explained below.

	Insert Option	Ctrl+Shift+O	Add an option line to the current Worksheet item
	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
	Insert Custom Catalog Standard	Ctrl+Shift+S	Add a Standard to the Worksheet
	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 price adjustment to the Worksheet
	Insert Subtotal	Ctrl+Shift+U	Add a subtotal to the Worksheet
	Insert		Allows the items from the dropdown to be added to the Worksheet

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

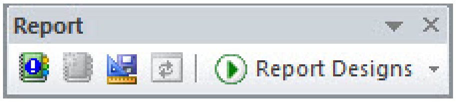
Worksheet

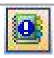


Icon	Name	Shortcut	Function
	Customize Columns		Opens the Worksheet properties dialog to adjust column setting.
	Resize Columns		Resize all columns automatically so all contents are displayed.
	Multi Sort		Sorts multiple columns.
	Sort Settings		Opens a drop-down menu to access the Manage Sort Settings function and all available saved Sort Settings that can be applied.
	Assign		Assigns a value to a column, option or attribute.
	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.
	Consolidate		Merges like items in the Worksheet.
	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.
	Apply Discount	Ctrl+D	Opens the Discount dialog box.
	Show Associated Drawing		If the current worksheet is associated to a drawing, opens AutoCAD and loads the associated drawing.

Report



Icon	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.
	Refresh Report View	Refreshes the report view to show any changes in design or content of the current worksheet.
	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** 

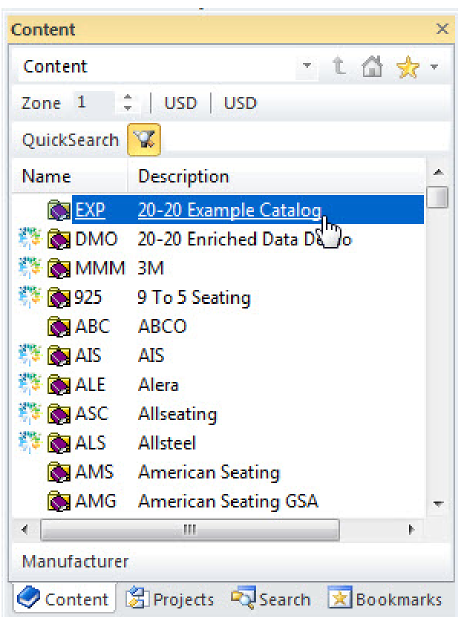
button

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.



The Explorer pane consists of four tabs:

- Content tab: displays manufacturer catalogs.
- Projects tab: 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:

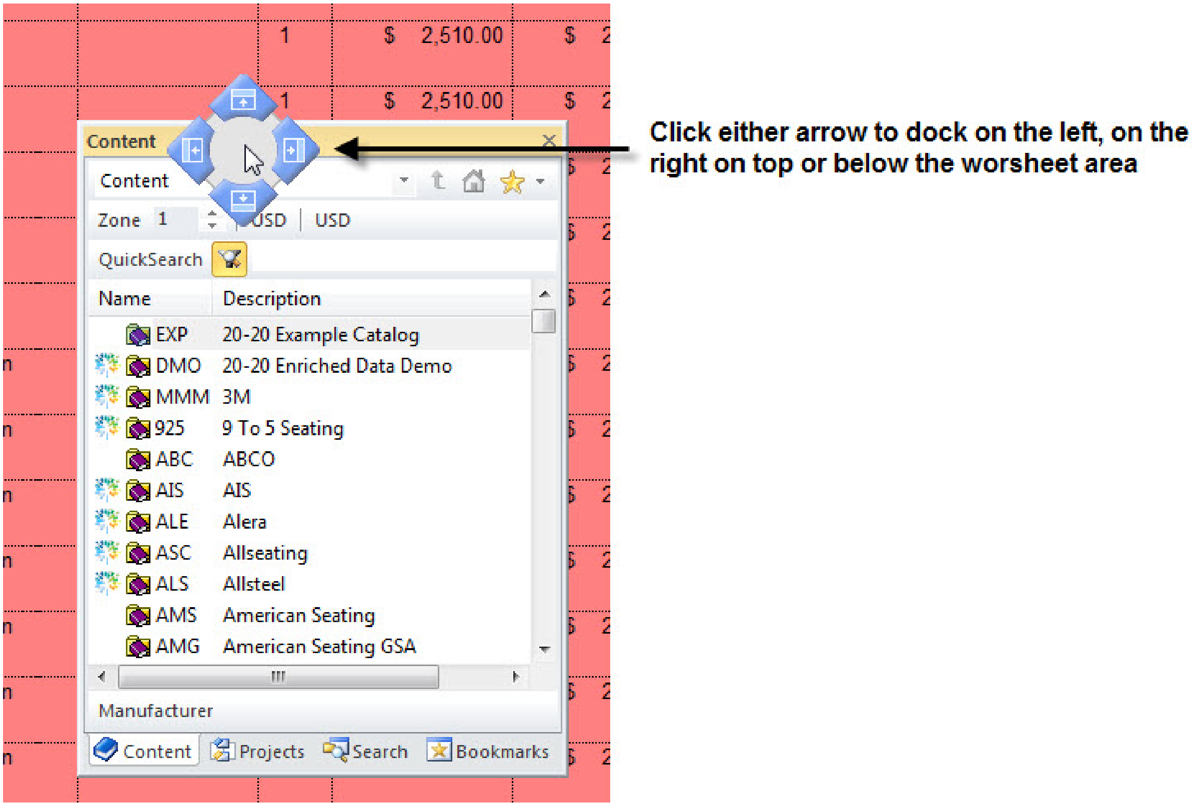
- Move the Explorer bar
- Auto-hide feature (Explorer bar)
- Show or hide Explorer bar tabs

Move the Explorer pane

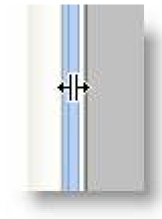
With the flexibility of AutoHide, floating and docking, you can tailor the 2020 Worksheet screen to the way you work.

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.



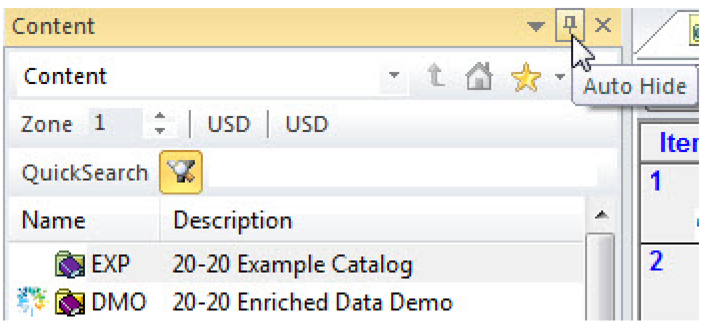
When Explorer is docked, you can resize the window by dragging on the vertical bar between Explorer and the Worksheet area.



Auto-hide feature (Explorer pane)

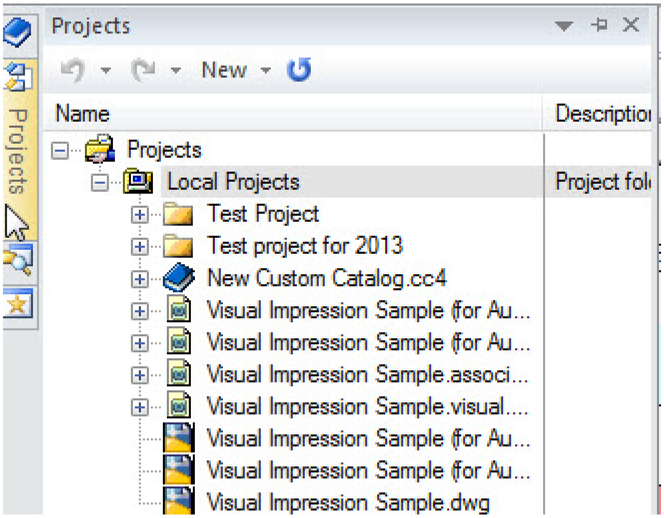
By putting the Explorer pane on auto-hide you can see more of your worksheet when you are not using any of the Explorer tabs.

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.

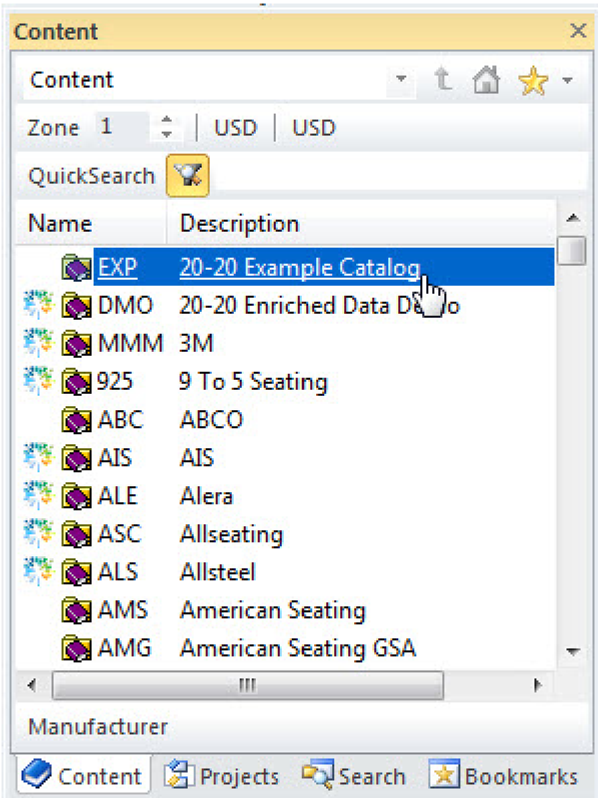
You can close and open each of the different tabs individually by doing any of the following:

- 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 auto hide.

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 QuickSearch 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:

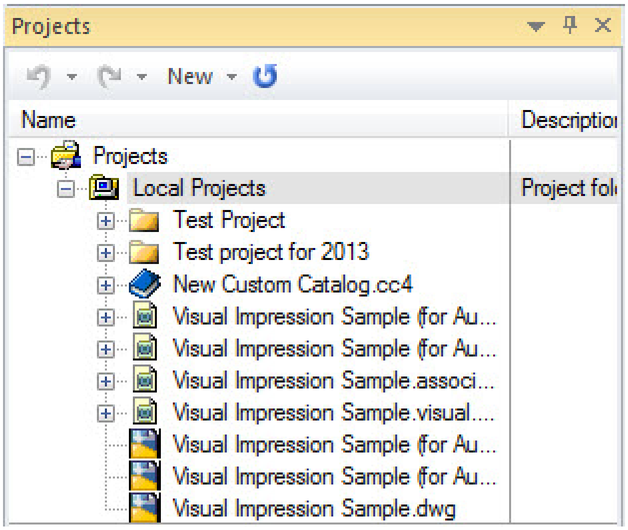
1. From the menu select **Tools**, **Preferences** to open the **Preferences** dialog**.**
2. Click Content to control the manufacturers and catalogs displayed here. By default, all catalogs are loaded and available at the same time.

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

   Click Common 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 custom catalog, including Standards.



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.

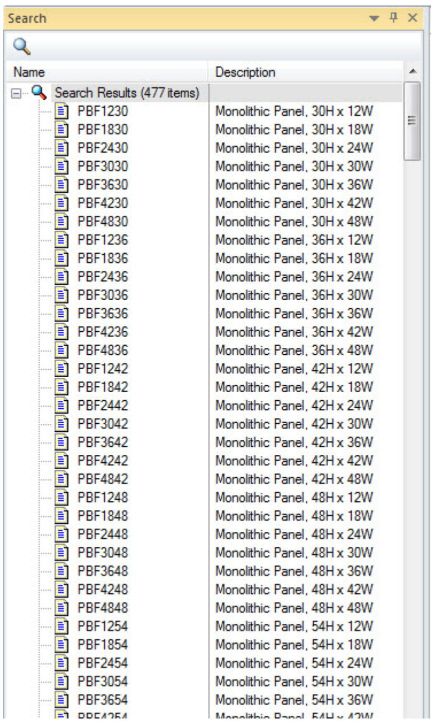
See Projects for more information.

Search tab

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

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 send them into drawings or worksheets or drag and drop them as you would from the Content tab of Explorer.

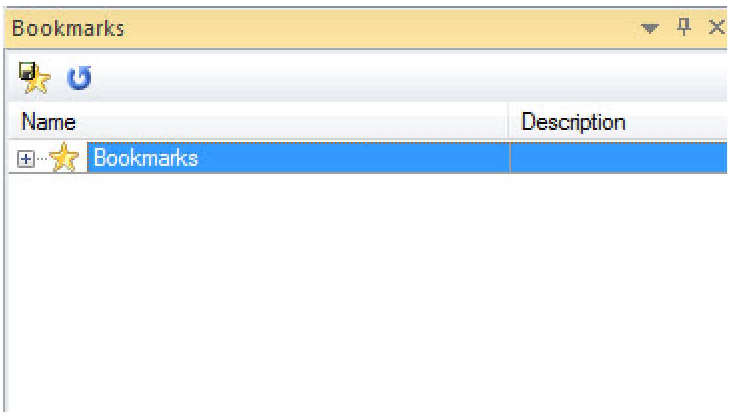


Bookmarks tab

The Bookmarks tab contains a list of bookmarks that you have added. From here you can organize bookmarks 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 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.



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

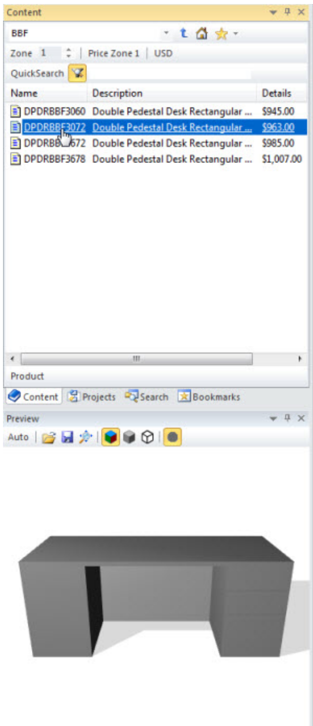
3. Drag and drop a product to a worksheet or send it to a drawing or worksheet.

Preview pane

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

As you mouse over selections in the Explorer, the Preview pane displays images. Also, you can preview multiple items if you select a standard from a custom catalog (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 auto-hide and move the Preview pane.

Worksheet area

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

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

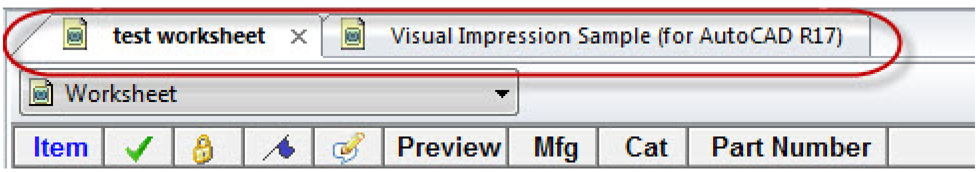
Each worksheet has four tabs:

- 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.



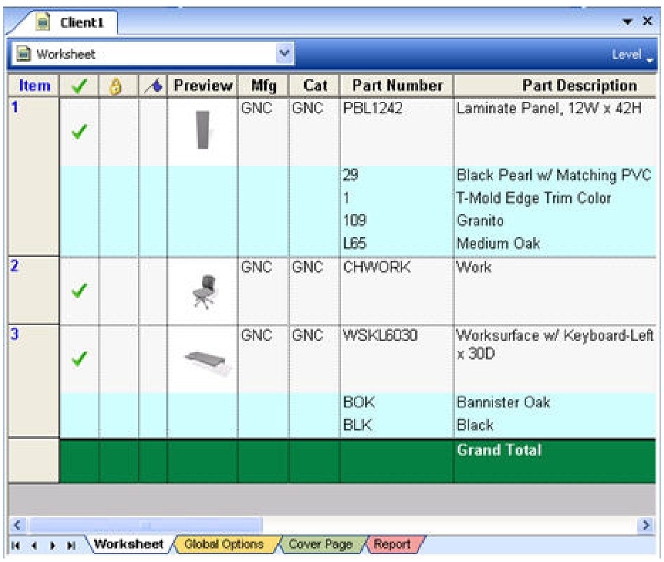
2. If the worksheet is not visible, click the drop-down arrow to the right of the tabs and select the desired worksheet.

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 enter and edit items in a worksheet.



To resize the worksheet text size, from the menu select **Tools**, **Preferences**, then click Display.

To show or hide rows, see Show or hide rows.

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 products, options, attributes, standards, outline levels, worksheet links, price adjustments, subtotals 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.

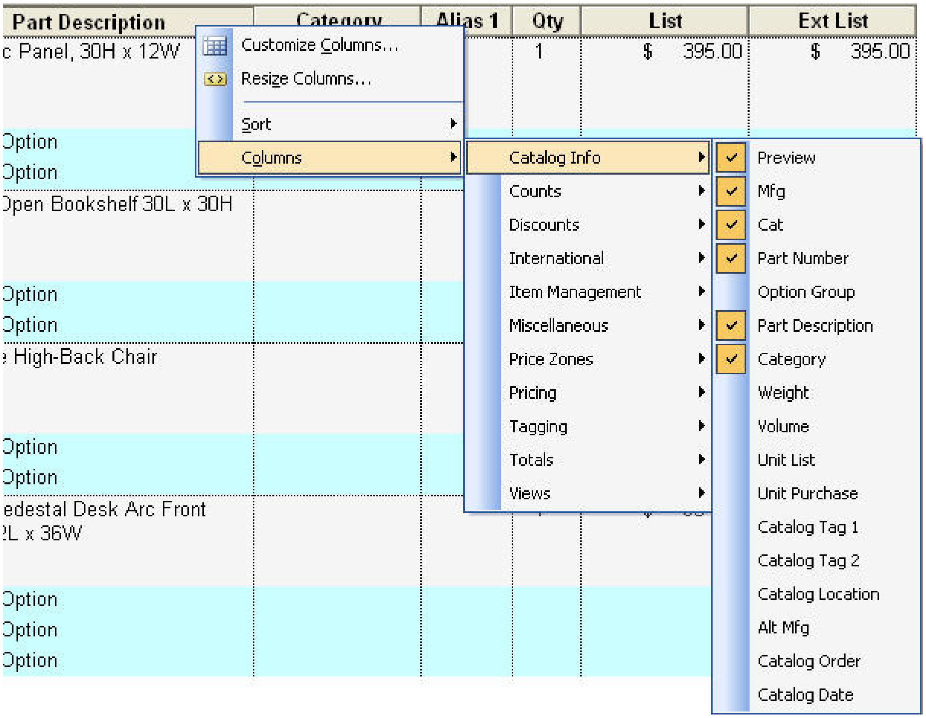
To resize all columns to view all the information in each column:

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.



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

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 printout. 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.

To:	Do this:
Display or hide a column	Check or clear the check boxes next to the column names. 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 column header text	Change the **Text** value. This field can be used to add your own customized columns. For example, click on one of the **Alias** columns, then change the **Text** value. Even if you change the column header text here, its field name will not be changed in Report Designer.

Resize the column width	Beside **Width**, enter the value in pixels. For a quicker way, see Resize Columns.
Define the justification of text in the column	Change **Justify** to Left, Center or Right.
Change the data type accepted by the column	Beside **Type**, select the data type. You can only change the data type of certain columns.
Disable a column, make it read-only or set is as readable and writable	Beside **Mode**, select: **Disabled** - user cannot click on the column **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 Worksheet templates.

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

Catalog Info columns

Column	Description
Preview	See Preview column
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 archived catalog.
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

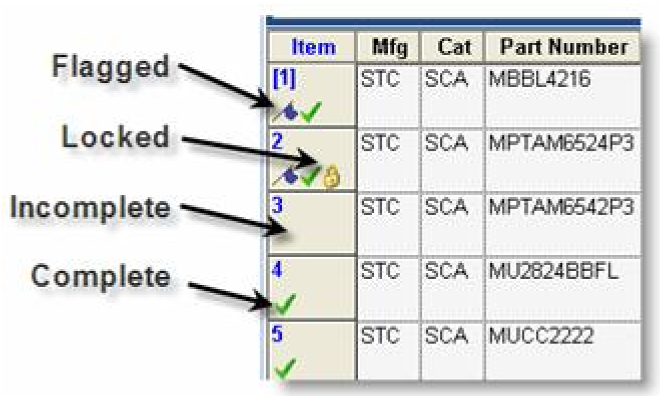
Item Management

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.
- Complete - indicates if the item is optioned 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 turned off, 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 Item Detail view of the Task Pane.

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 General. By default this preference is turned on.

Miscellaneous columns

Column	Description
Special	Checkbox to indicate if this is a custom item. See Change an existing part into a custom item.
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	Mfg. 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
Tag	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.

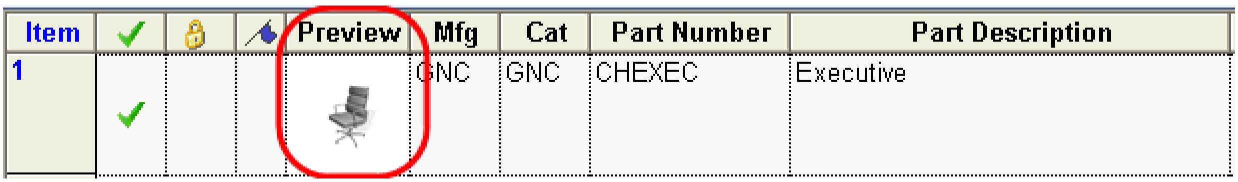
Totals columns

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



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 dragged and dropped from the Explorer pane to the worksheet area — the image displayed in the **Preview** column will be the same as the one displayed in the Preview pane
- 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.

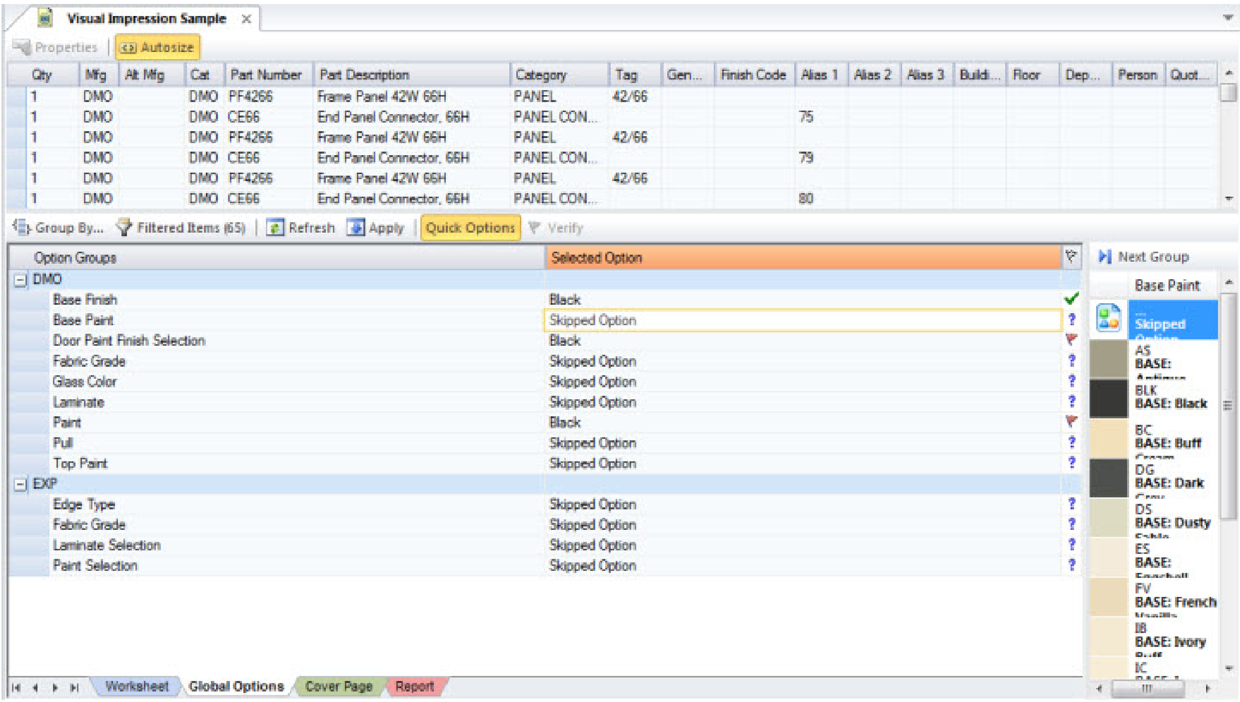
The **Preview** column is empty if:

- 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 Update preview images.

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 Global Options for more information.



Cover Page tab

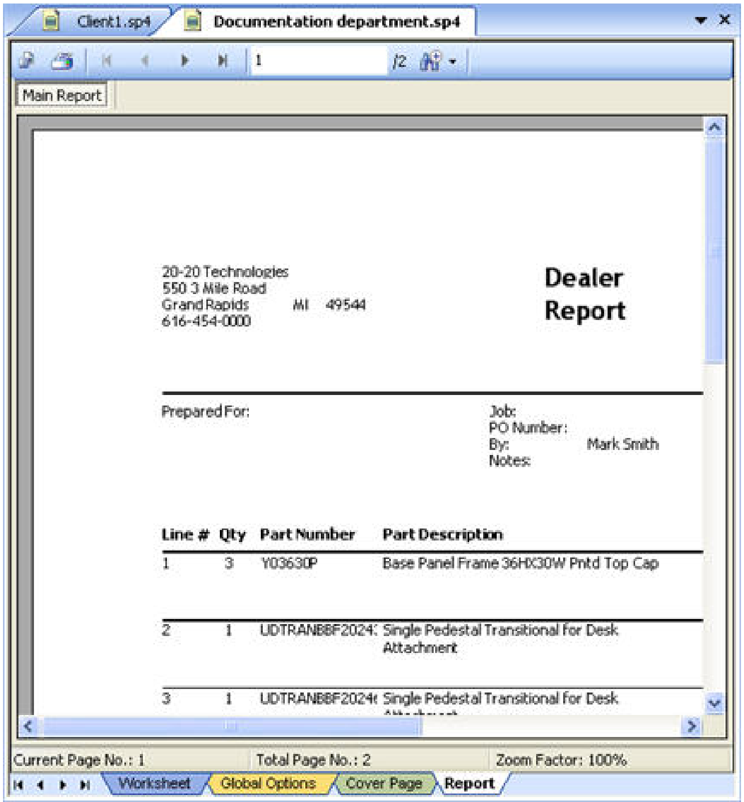
Cover page is a customizable page that will pull information form the worksheet and Worksheet Properties to populate fields of information.

See Cover page 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 Reports.



Task pane

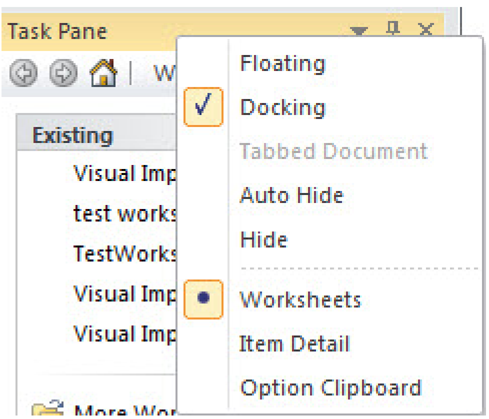
By default, the Task pane is visible when you open 2020 Worksheet. To find out how to hide or display the Task pane, see Show or hide the Task pane.

The Task pane is similar to the Explorer pane. 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 Auto-hide feature. You can also Move the Task pane.

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.

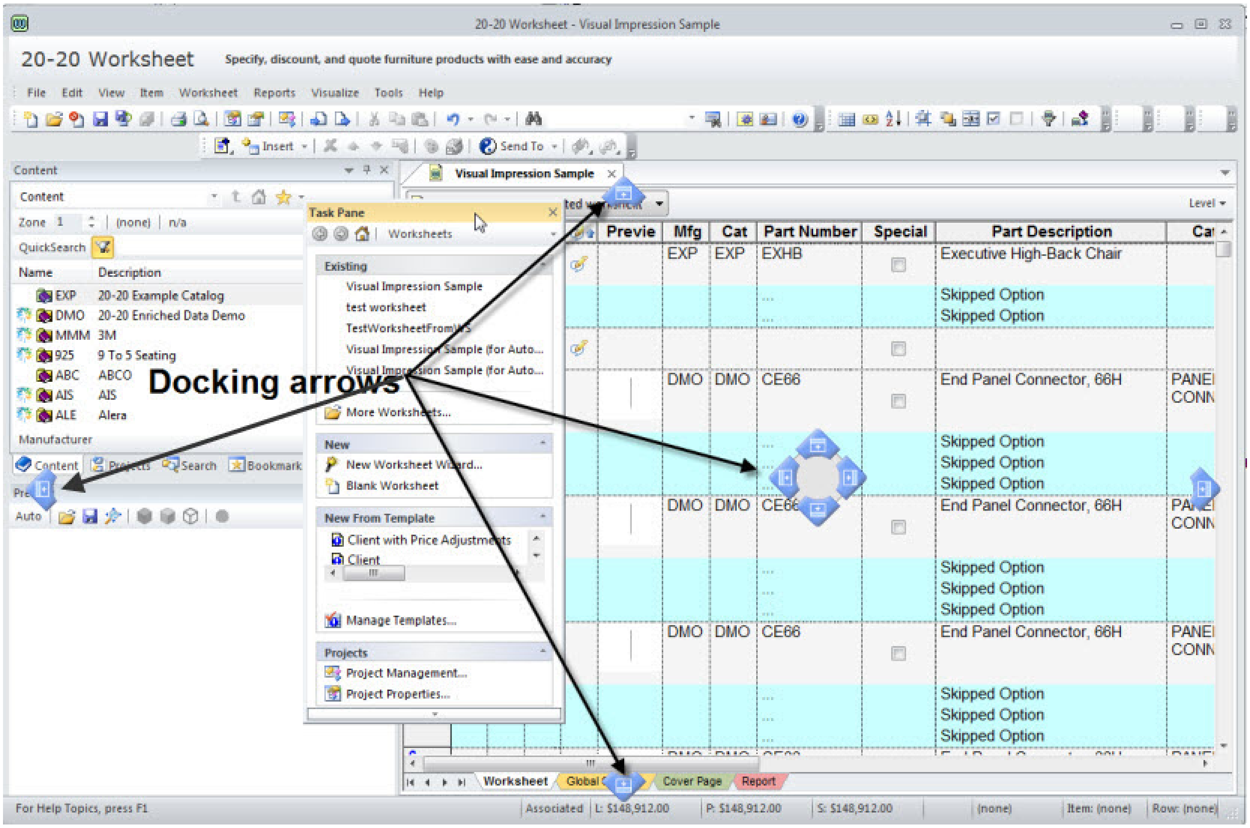
See also:

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

Move the Task pane

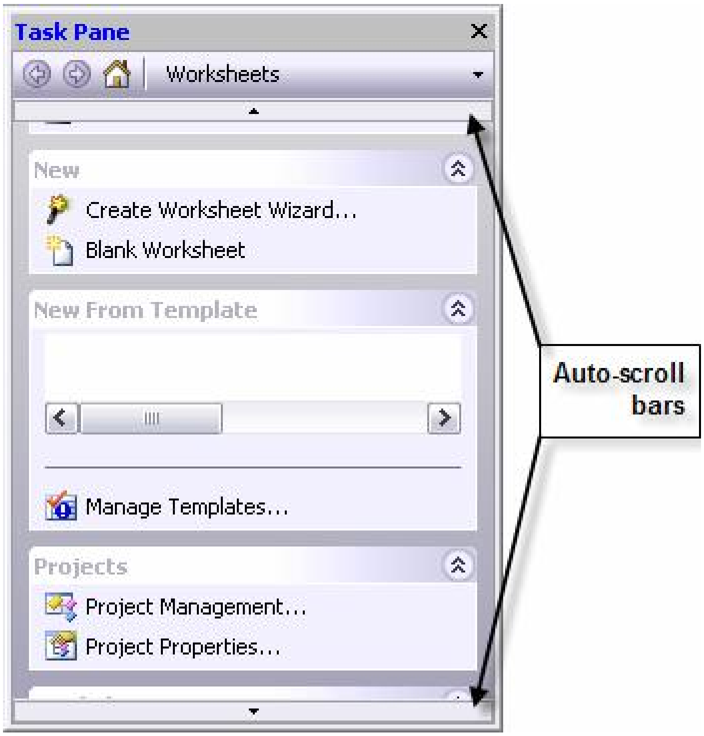
The Task Pane can be docked (attached to the side of the Worksheet window) or undocked (unattached and floating in the middle of the Worksheet window).

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.


20-20 Worksheet - Visual Impression Sample
20-20 Worksheet
Specify, discount, and quote furniture products with ease and accuracy
File Edit View Item Worksheet Reports Visualize Tools Help
Insert
Send To
Content
Zone 1
(none)
n/a
QuickSearch
Name
Description
EXP 20-20 Example Catalog
DMO 20-20 Enriched Data Demo
MMM 3M
925 9 To 5 Seating
ABC ABCO
AIS AIS
ALE Alera
Manufacturer
Content
Projects
Search
Bookmark
Auto
Docking arrows
Task Pane
Worksheets
Existing
Visual Impression Sample
test worksheet
More Worksheets...
New
New Worksheet Wizard...
Blank Worksheet
New From Template
Client with Price Adjustments
Client
Manage Templates...
Projects
Project Management...
Project Properties...
Visual Impression Sample
Level
Previe
Mfg
Cat
Part Number
Special
Part Description
EXP EXP EXHB
Executive High-Back Chair
Skipped Option
DMO DMO CE66
End Panel Connector, 66H
Worksheet
Cover Page
Report
For Help Topics, press F1
Associated
L: $148,912.00
P: $148,912.00
S: $148,912.00
(none)
Item: (none)
Row: (none)

Auto-scroll bars

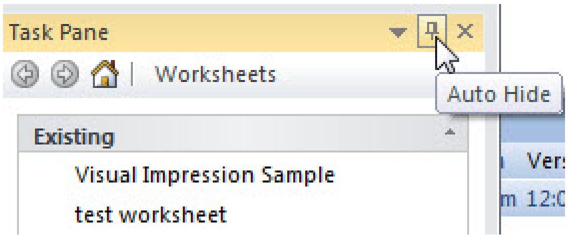
If the contents of a Task Pane view is too extensive to be viewed at one time, auto-scroll bars appear at the bottom and/or the top of the view. Hover over these auto-scroll bars to automatically scroll the view.



Auto-hide feature (Task pane)

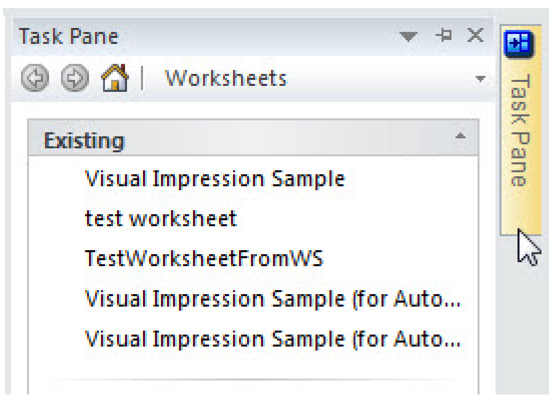
By putting the Task pane on auto-hide you can see more of your worksheet screen when you are not using any of the Task pane features.

1. Click the push pin on the Task pane.



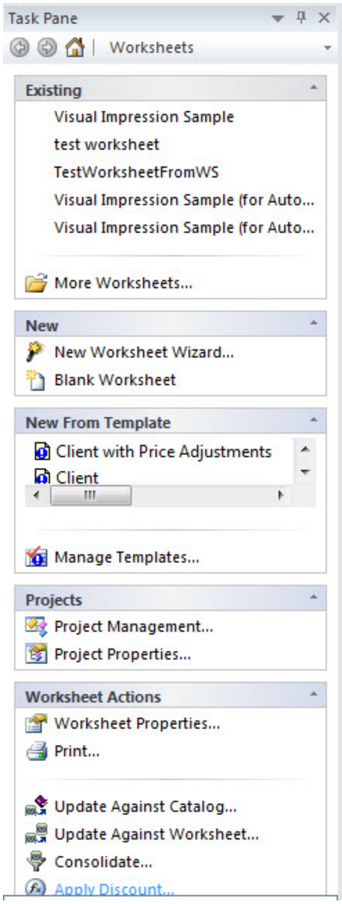
   The Task pane will collapse and be on the far right side of your screen.

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.

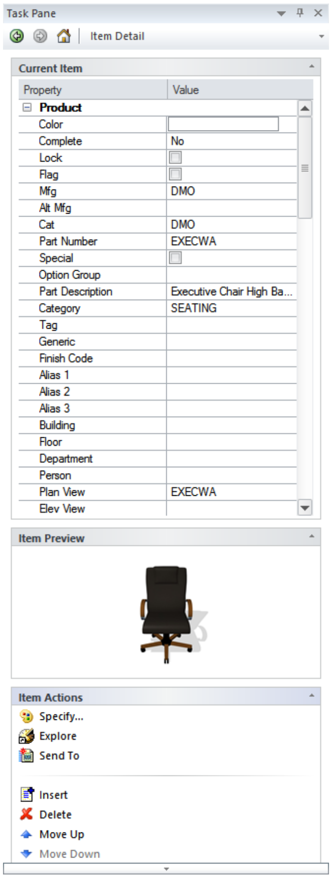


In the Worksheets view you can:

- Open one of the last 5 worksheets you worked on
- Create a new worksheet quickly, either blank or from a template
- 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 current 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.

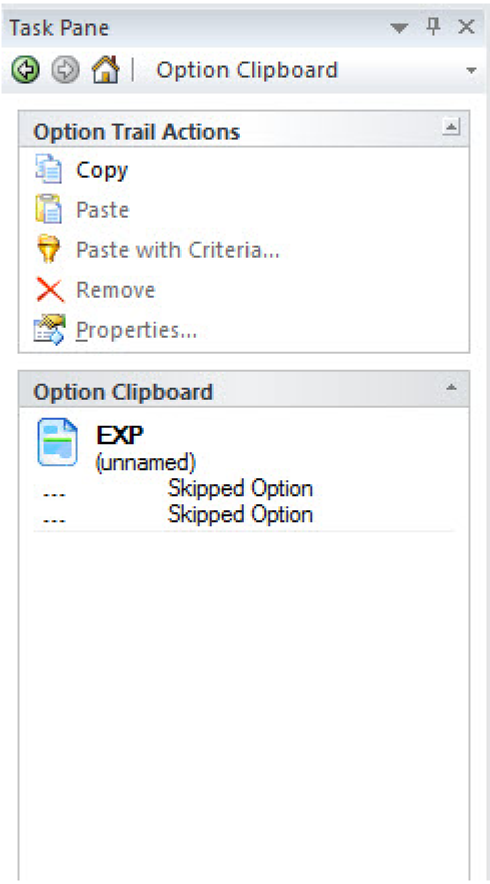
Some of the commands available in Item Detail view are:

- 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.



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:

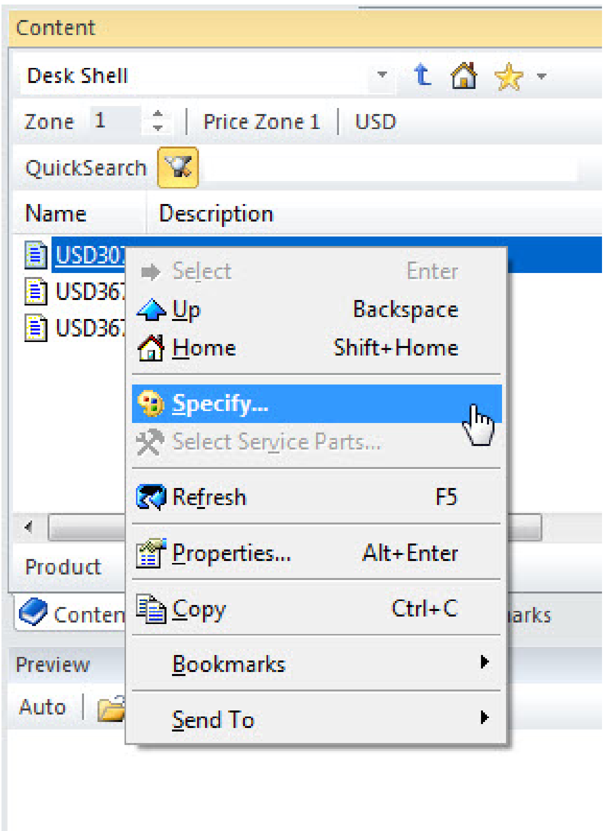
- the Total List, Purchase and Sell Price for the worksheet
- whether you are on a Product line, an Option Line or an Attribute line
- where you are in the current worksheet: the item number, the row and column (similar to Microsoft Excel)

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 [Content tab](#) 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 new blank worksheet
- create a new worksheet using the Wizard

New blank worksheet

1. Click  on the Standard toolbar.
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 preferences.

   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 Manage projects 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 Common 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  on the Standard toolbar.

2. If you want to **apply the current project's template 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  on the Standard toolbar.
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 [Standard toolbar](). 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**.

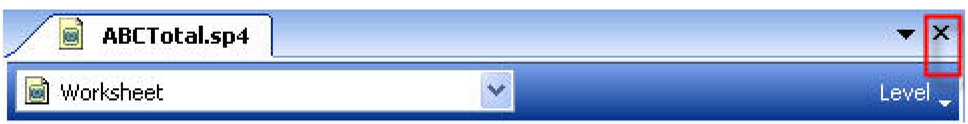
To save all modified worksheets, click  in the [Standard toolbar](). Do the same actions as in step 2 above.

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

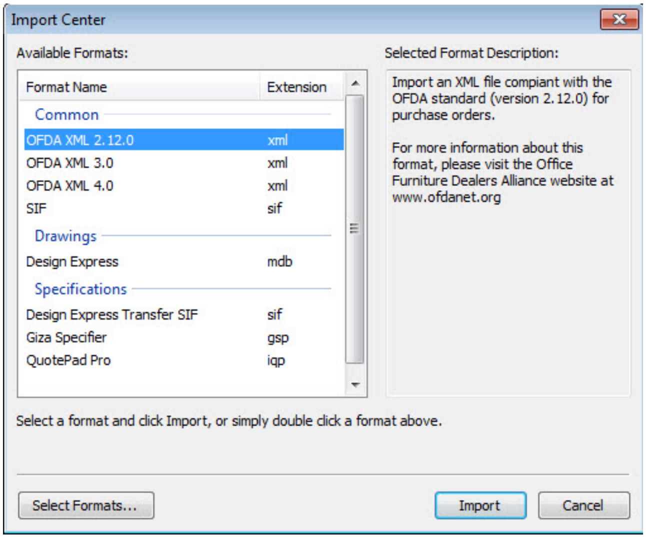
2020 Worksheet gives you the flexibility to work with other applications and file formats. You can:

- 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.



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 consolidate identical items in the worksheet and update your worksheet against the catalogs. Click **Yes**.

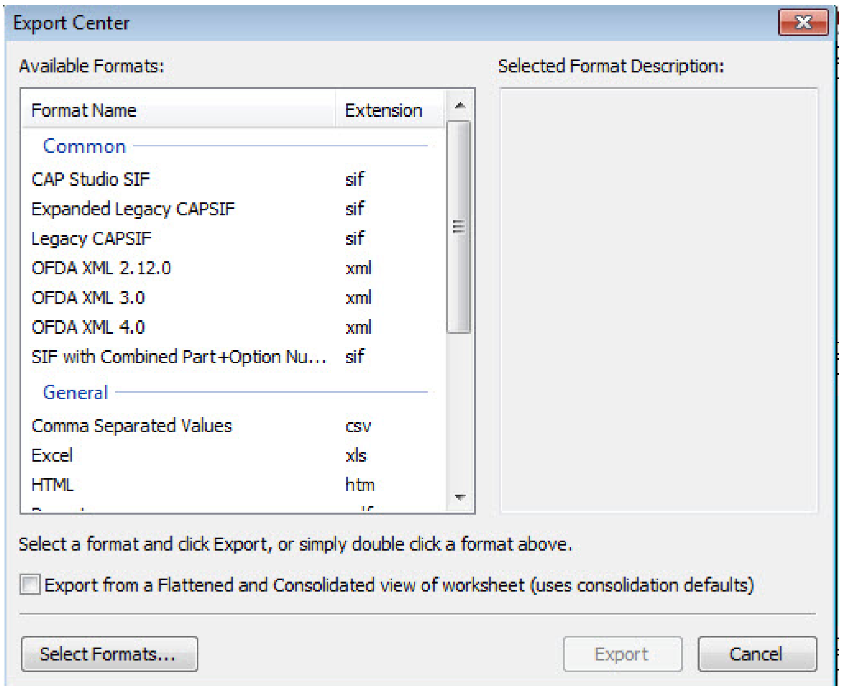
Note: Worksheet remembers the last used format so the next time you open the Import Center, the last used format is automatically selected. The Steelcase SpecSIF option is for files with .ssf extensions.

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.



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 flattened, and identical items consolidated 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 panel configurations 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.
- Convert a Design Express project 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 custom catalogs. 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 create a new one.
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 update converted items against manufacturer catalogs.

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 worksheet template 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 consolidate 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 Standard toolbar.
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.

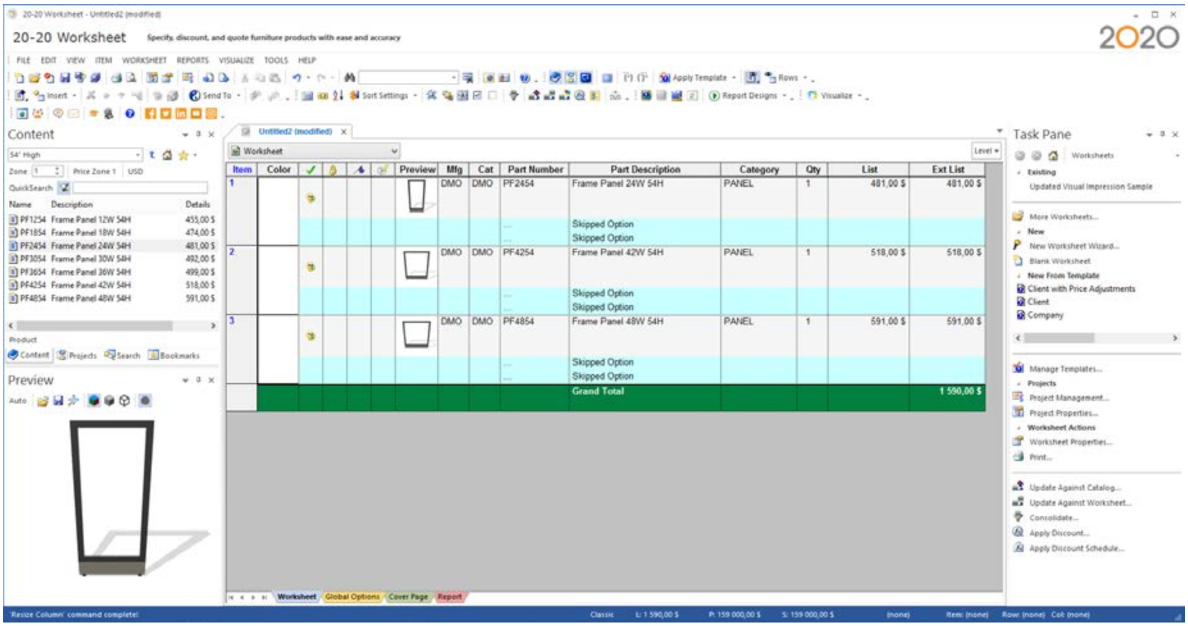
Example - Print panels only

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

1. Sort your worksheet by Part Description, Part Number and Catalog code.
2. Select 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.



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 Advanced Find Feature 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 set the default printer 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 cover page and/or the report.
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 Worksheet Properties 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.

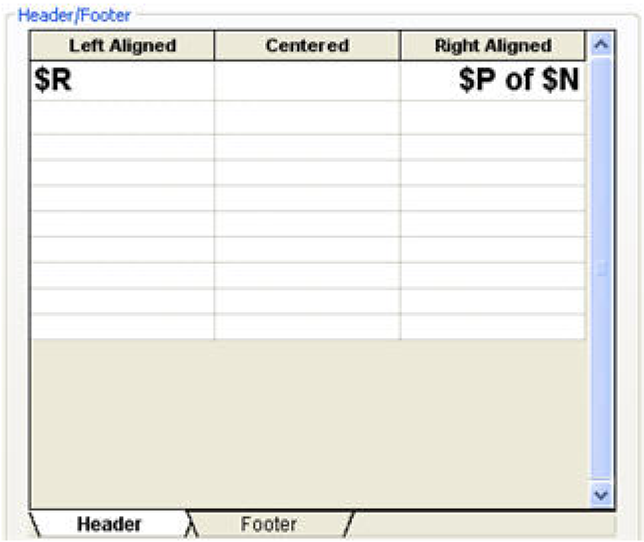
Note: When modifying the Header/Footer, insert the code first before typing in text. Otherwise, the text you entered will be overwritten by the code.

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

See Example: customize the header 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.



$R is a default symbol for the **Title** of the worksheet. The Worksheet Title is set in the General tab of the Worksheet Properties 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.

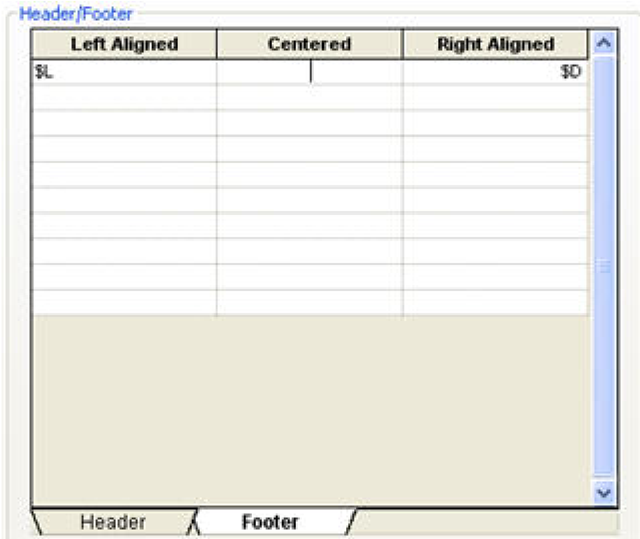
Note: Click the **Legend** button for all legend codes and descriptions.

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.



$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.

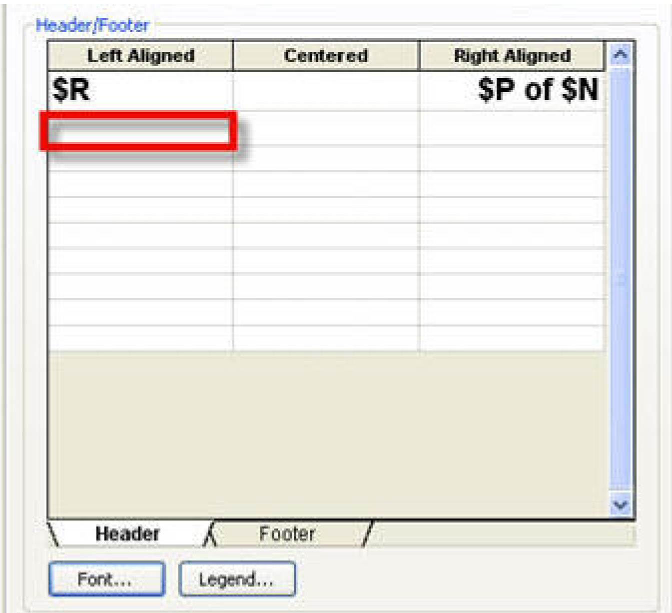
See also:

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

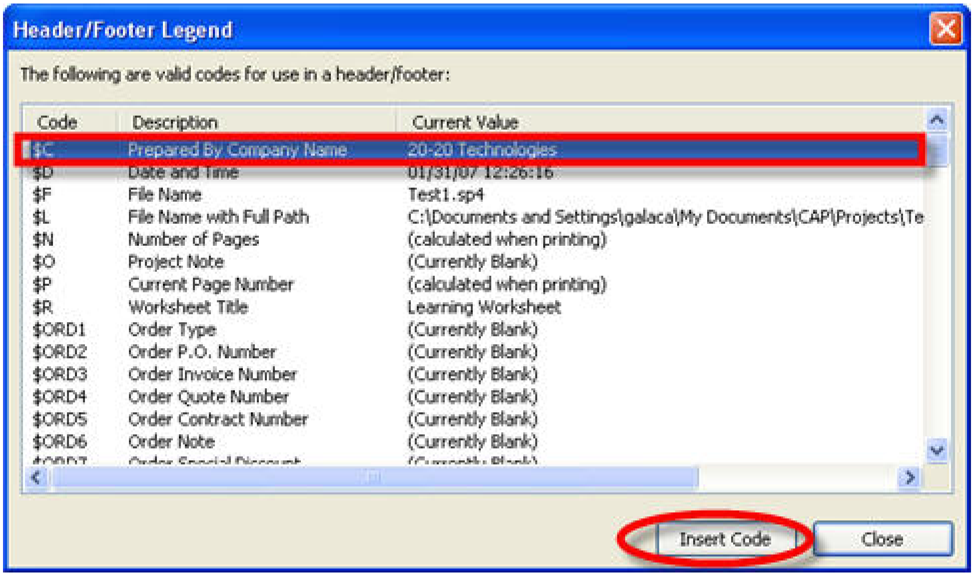
Example: customize the header

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

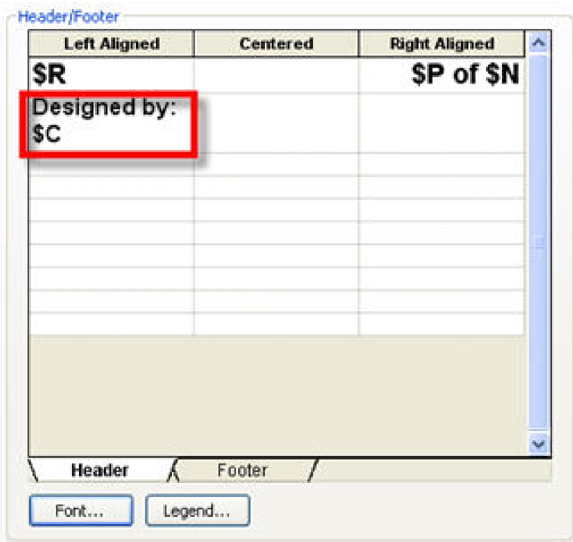
1. In the **Header** tab, click the second cell under the column **Left Aligned**.



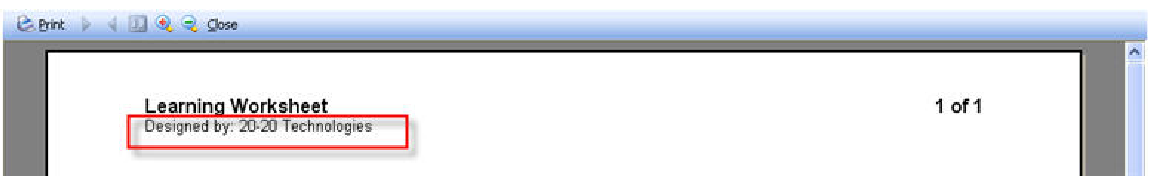
2. Click the **Legend** button to access the list of codes.
3. In the **Header/Footer Legend** dialog, select the code **$C - Prepared by Company Name** then click **Insert Code**.


Header/Footer Legend
The following are valid codes for use in a header/footer:
Code
Description
Current Value
$C Prepared By Company Name 20-20 Technologies
$D Date and Time 01/31/07 12:26:16
$F File Name Test1.sp4
$L File Name with Full Path C:\Documents and Settings\galaca\My Documents\CAP\Projects\Te
$N Number of Pages (calculated when printing)
$O 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)
Insert Code
Close

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



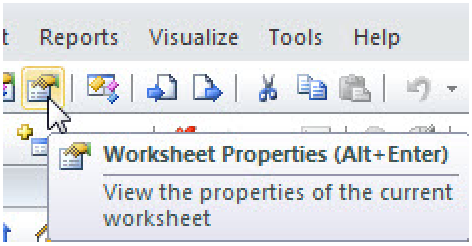
5. Click **Font**. Select **Font** = Arial, **Font Style** = Regular and **Size** = 12. Click **OK.**
6. Click **Page Setup** to open the **Page Setup** dialog.
7. Click **Print Preview** in the **Page Setup** dialog. Notice the header that you just entered.



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 Worksheet templates.

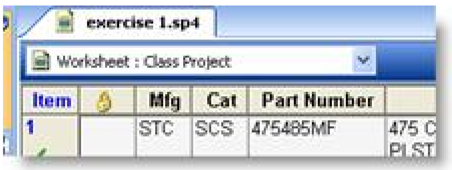
There are six panes available in the Worksheet Properties dialog box:

- General - 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.
- Columns - to customize the columns displayed and their order in the worksheet.
- Header/Footer - to customize the header and footer when printing the worksheet.
- Adjustments- 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 cover page and the reports.

1. Click  on the Standard toolbar.

   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 Fo**r:

4. In the 2020 Contacts Manager 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

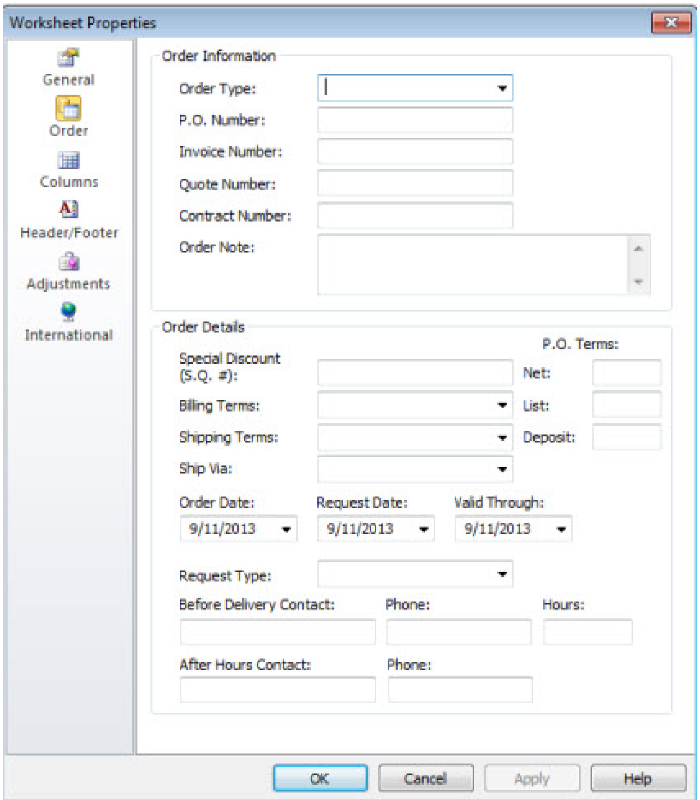
Note: Checking the **Security** box then entering a password will protect your worksheets.

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 reports.

1. Click  on the Standard toolbar.

2. Click **Order.**



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 Standard toolbar.

2. Click **Columns.**

   Note: Click **Grouped View** if you want to view columns by category.

3. Customize the columns then click **OK.**

Header/Footer

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

1. Click  on the Standard toolbar.
2. Click **Header/Footer**.
3. See Header / Footer 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 Standard toolbar.
2. Click **Adjustments**.
3. Click **Add.**
4. See Price Adjustments 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 worksheet properties 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:

   General - to enter the worksheet title and worksheet contact information
   Order - to enter order information
   Columns - to customize the columns displayed and their order in the worksheet
   Header/Footer - to define the header and footer when printing the worksheet
   Adjustments- 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**.

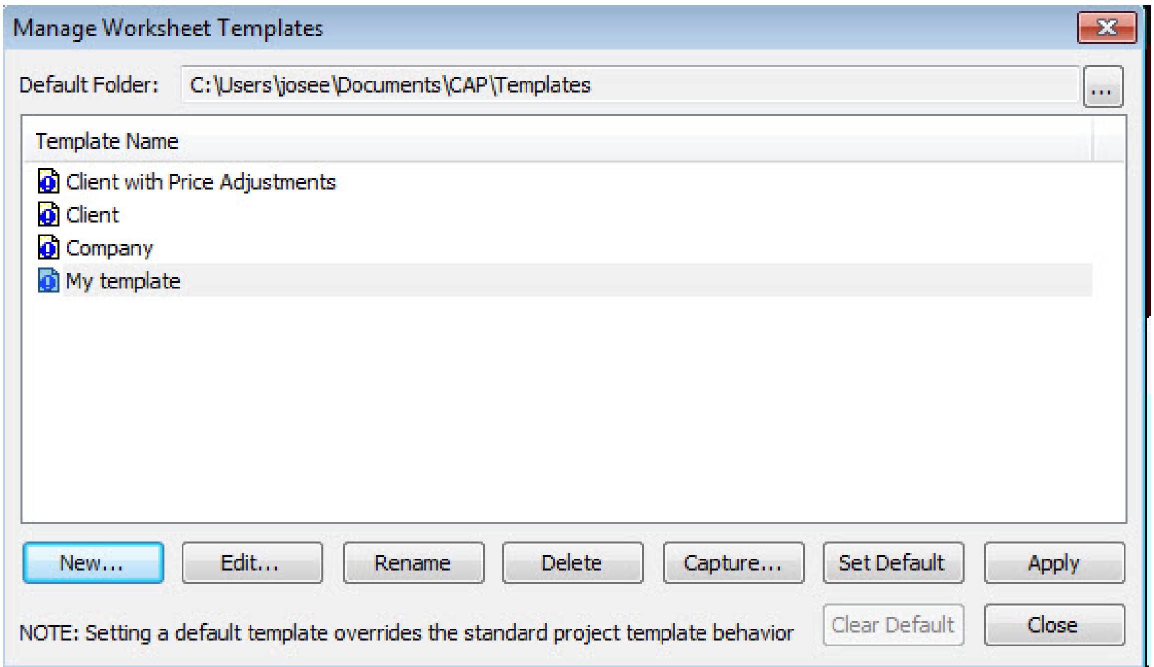
2. In the Manage Worksheet Templates dialog, click **Capture**.

3. Enter the template name then click **OK**.

Now that template is saved, it can be applied 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.



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

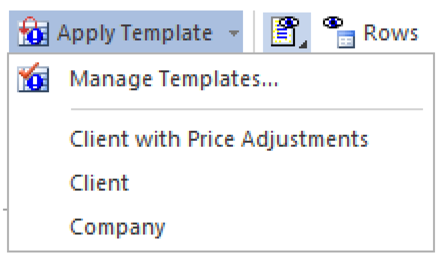
Note: If you wish to use the standard project template again later on, click **Clear Default**.

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 Common preferences.
4. Click **OK**.

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



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 Projects tab of the Explorer pane 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 save worksheets and drawings in this project folder.

Note: You can also create a project folder using the Project Management Wizard.

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**:

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

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

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 worksheet templates, that is, you can apply a project template to a worksheet.

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:

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

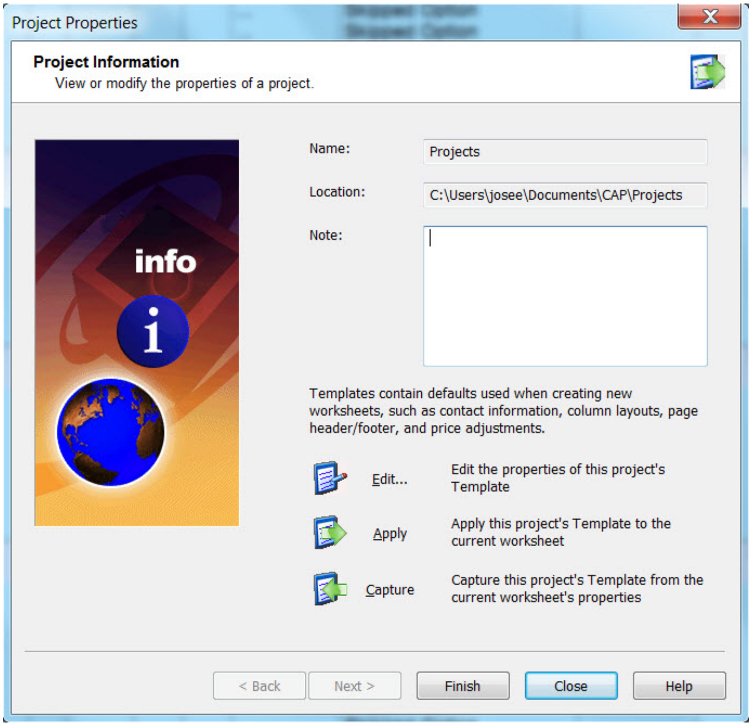
6. Click **Finish**.

Apply a project template to a worksheet

Just as you can apply a worksheet template to a worksheet, you can apply a project template to a worksheet.

1. Click the Projects tab of the Explorer bar.
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 Common 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.

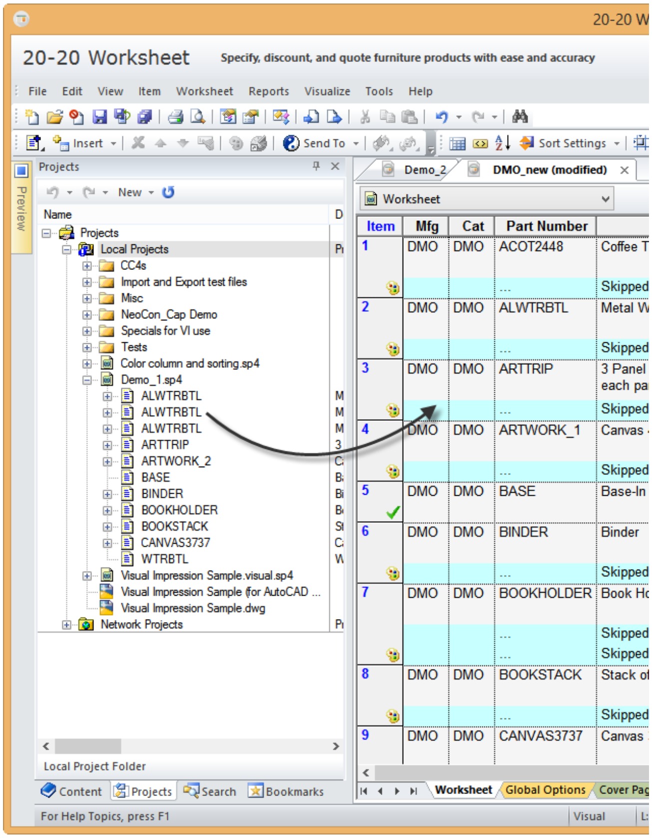
1. Click the Projects tab of the Explorer pane.
2. Open the folders by double-clicking on them or clicking on the +.
3. If you double-click on a worksheet file name, Worksheet will automatically open the file.

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

Copy products from other worksheets

1. Click the Projects tab of the Explorer pane.
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 custom catalogs to worksheets. See Reuse and update items from a custom catalog.

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:

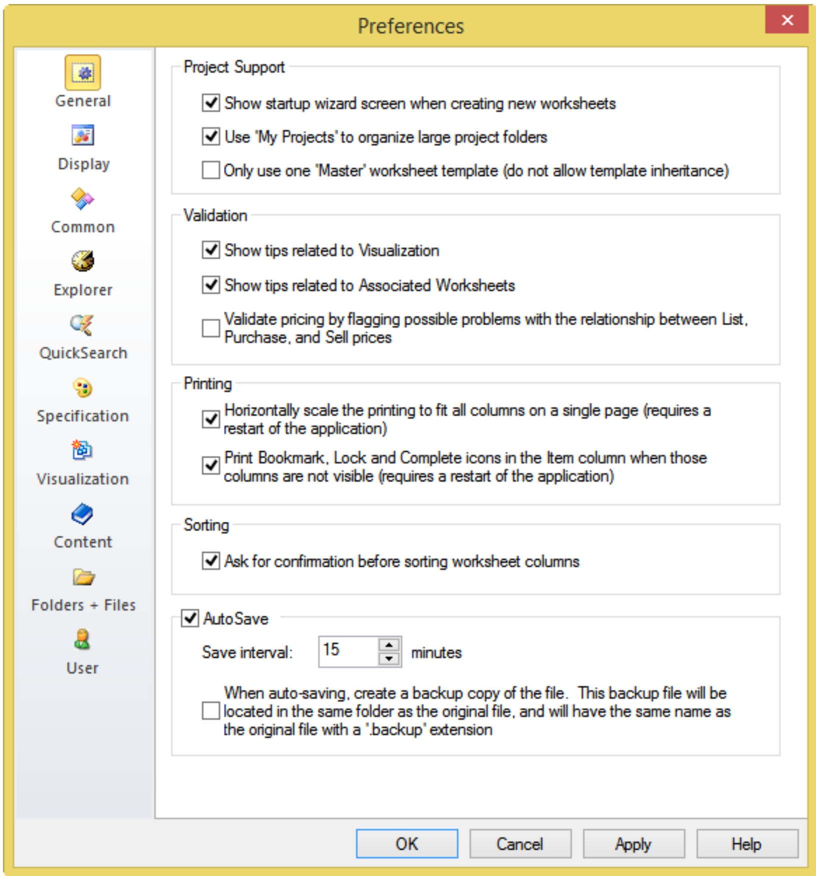
- General - set printing, column sorting and file auto-save defaults
- Display - change font styles and sizes
- Common - modify Apply Template, Update Against Catalog and Consolidate criteria default settings
- Explorer - customize the Explorer bar
- QuickSearch - change how QuickSearch works
- Specification - 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
- Content - 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.



2. 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 corresponding topic:

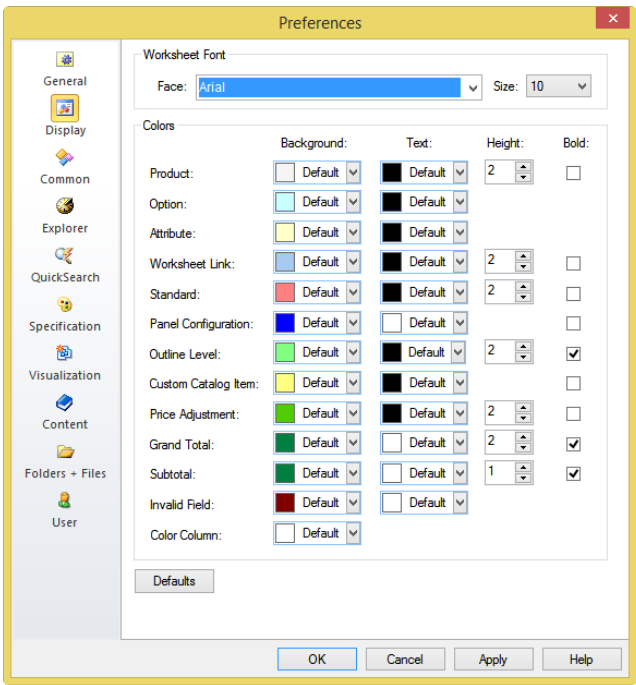
Category	Settings
Project Support	Show startup wizard screen when creating new worksheets
Validation	**Show tips related to Visualization** and **Show tips related to Associated Worksheets** to display tips on how the current worksheet will interact with Visual Impression and any associated worksheet.
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	• Check **AutoSave** to enable the automatic save of worksheets. • Click the scroll button to change the 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**.



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**.

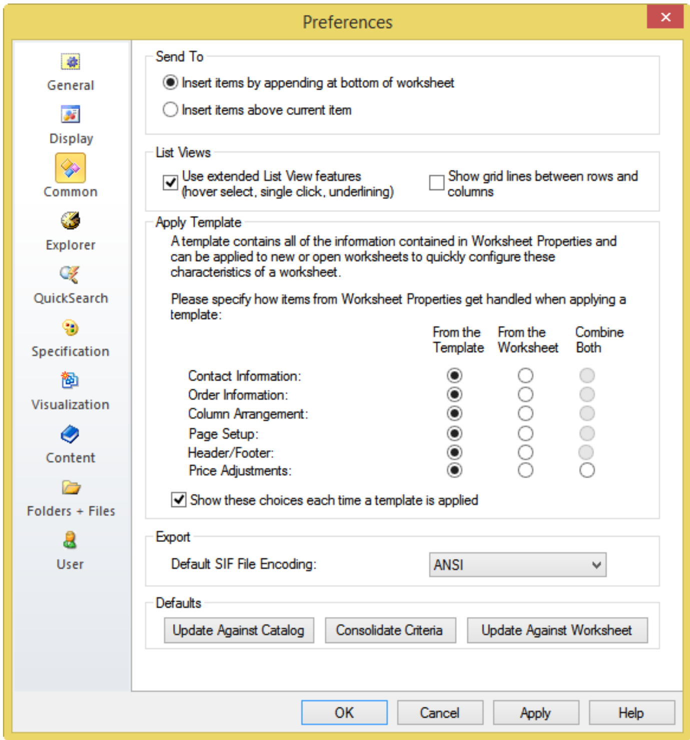
4. Click **OK** to save and close.

   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**.



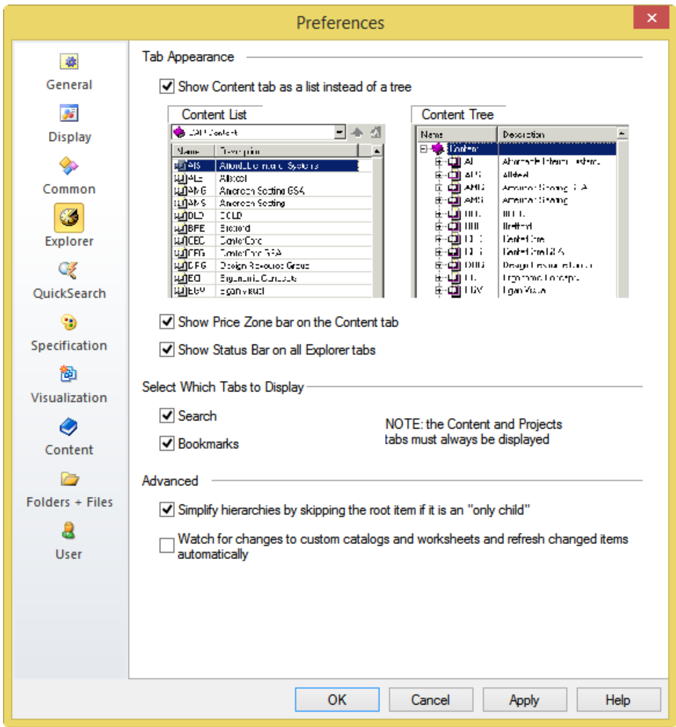
3. Modify any of the following settings and then click **OK** to save and close. Or, click **Apply** to save and keep the **Preferences** dialog open.

Category	Settings
Send to	Change the behavior when sending items to a worksheet: • Insert items by appending at bottom of worksheet • Insert items above current item
List Views	Change the settings for the Content tab of the Explorer bar if the Content tab is displayed in list view. • Use extended List View features (hover select, single click, underlining) • Check **Show grid lines between rows and columns** to display grid lines to separate items.
Apply template	Change default settings when applying a worksheet template. 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 exporting data.
Defaults	Click **Update Against Catalog** to set the default update values and default price zones selected when doing an update against a catalog. Click **Consolidate Criteria to** select the default columns used when performing a consolidate. Click **Update Against Worksheet** to set the default update values selected when doing an update against a worksheet.

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.

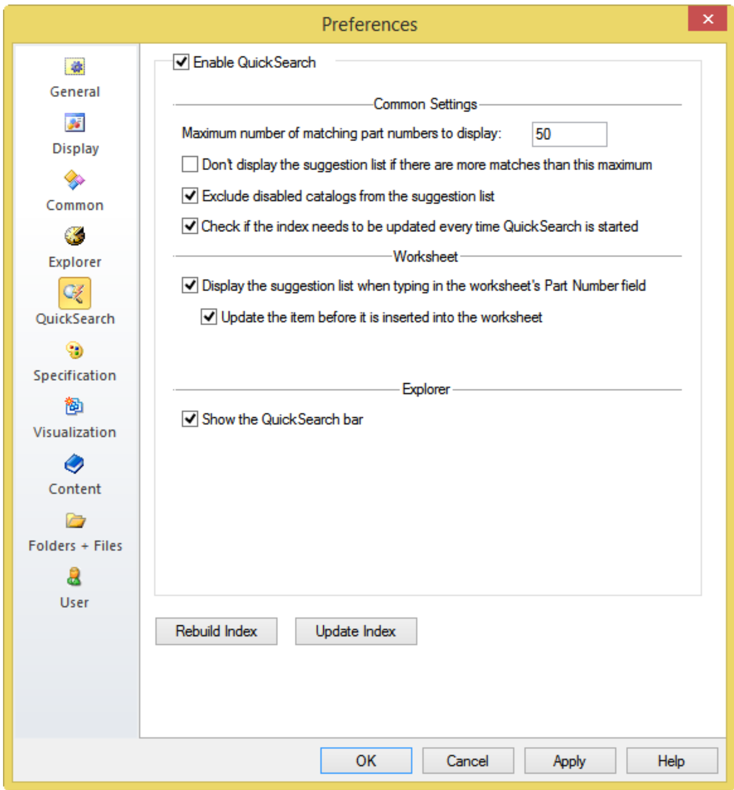
   Or, click **Apply** to save and keep the **Preferences** dialog open.

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

QuickSearch preferences

Use the QuickSearch preferences to set the QuickSearch behavior.

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



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 typing in the worksheet's Part Number field • Update the item before it is inserted into the worksheet
Explorer	Show or hide the QuickSearch field in the Explorer Pane.

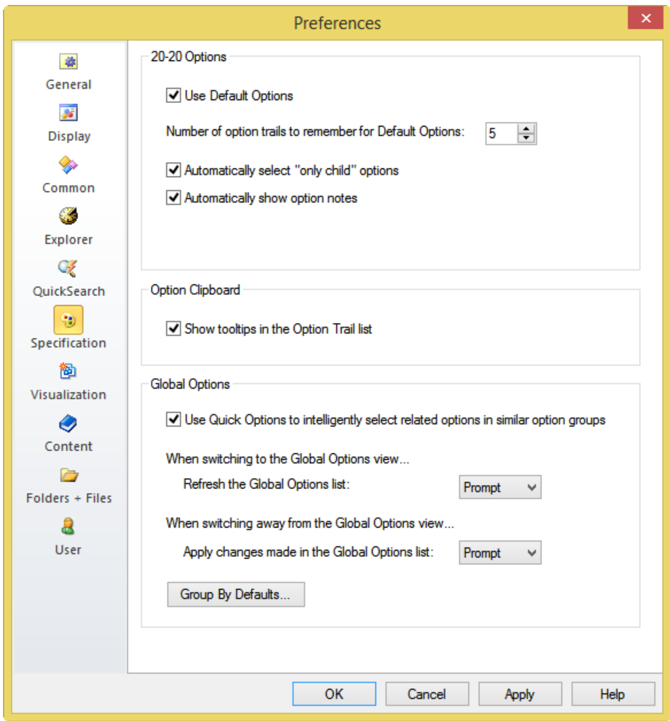
Note: A large index file (IDX) is included with every CAP Studio installation. The **Rebuild Index** button rebuilds this entire file from scratch. Use the **Rebuild Index** button only when there seems to be corruption in the IDX file, as it takes a few minutes to finish.

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**.



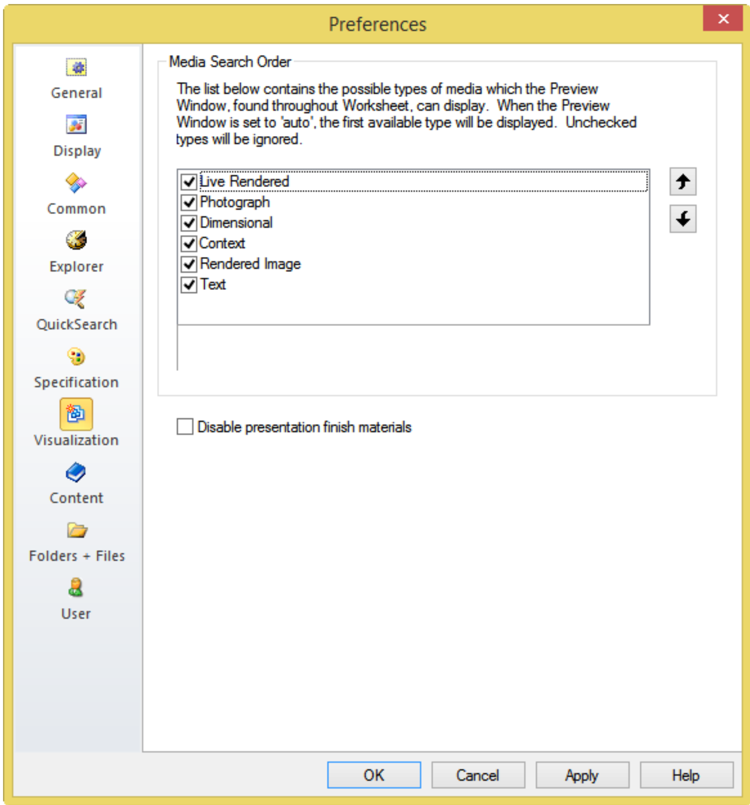
3. Change any of the following settings and then click **OK** to save and close. Or, click **Apply** to save and keep the **Preferences** dialog box open.

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	**Show tooltips in the Option Trail list** - Show the Option Trail properties dialog when the cursor hovers over an option trail in the clipboard.
Global Options	Use Quick Options to intelligently select related options in similar option groups Choose to prompt before, always or never refresh the Global Options 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 **Group By Defaults** 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.**



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.

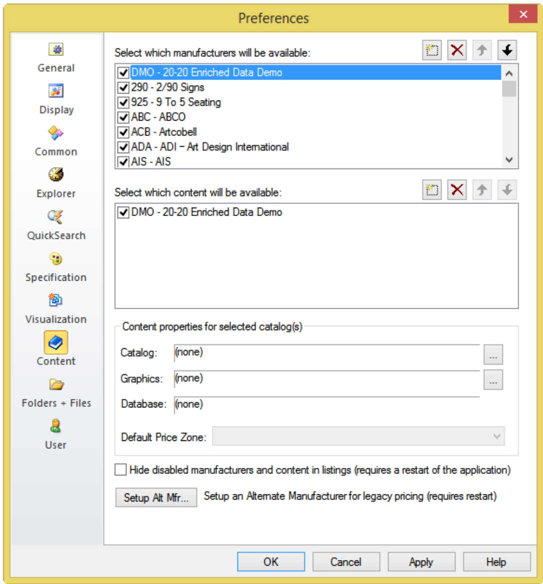
Content preferences

Use **Content** preferences to change the settings for the Content tab in the Explorer pane.

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.

To	Do this
Enable or disable a manufacturer in the Content tab	Check or uncheck a manufacturer in the list. When you disable a manufacturer it will be “grayed” out in the Content tab. Disabling a manufacturer is not the same as uninstalling it. If you want to hide a disabled manufacturer, check **Hide disabled Manufactures and content in listings** located at the bottom of the dialog box.
Enable or disable a catalog in the Content tab	1. Select a manufacturer in the list. 2. Check or uncheck a catalog. When you disable a catalog it will be “grayed” out in the **Content** tab. Disabling a catalog is not the same as uninstalling it. If you want to hide a disabled catalog, check **Hide disabled Manufactures and content in listings** located at the bottom of the dialog box.
Move a manufacturer or catalog up or down in the list	Select the catalog or manufacturer, then click  or . Note: If you use a particular manufacturer or catalog often, you can move it to the top of the list.
Add a 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 manufacturer or catalog	Note: The following steps will uninstall the selected item. 1. Select the manufacturer or catalog. 2. Click  to remove the selected manufacturer or catalog.
Change the location of a catalog, its catalog, its symbol library or its database	1. Select the manufacturer and catalog. 2. Under **Content Properties** click the **Browse** icon beside **Catalog**, **Graphics** or **Database**.
Change the default price zones	1. Select the manufacturer and the catalog. 2. Select the **default prize zone**.

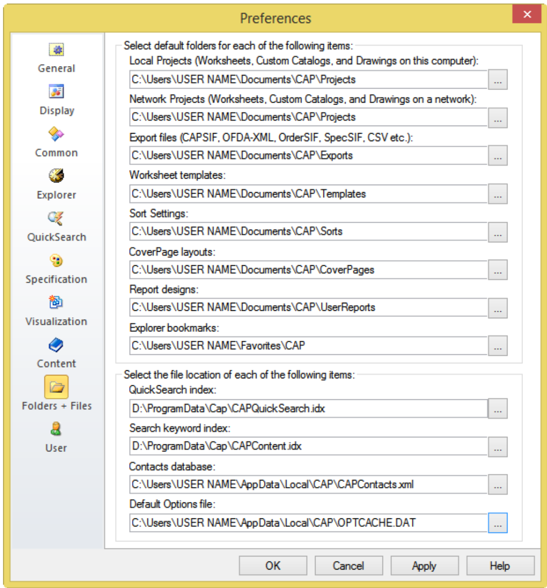
	Note: Steelcase and Kimball users can select specific price zones for old price lists.
Hide disabled manufacturers and catalogs	Check **Hide disabled manufacturers and catalog in listings**. When you restart 2020 Worksheet, the catalogs and manufacturers you disabled will not be listed in the **Content** 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 Projects tab of the Explorer pane. 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 export files will be stored. Can be on the local PC or on the network.
Worksheet templates	Select the folder where worksheet templates 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 cover page templates will be stored. Can be on the local PC or on the network.
Report designs	Select the folder where report designs will be stored. Can be on the local PC or on the network.
Explorer bookmarks	Select the folder where bookmarks will be saved. This folder should be on the local PC.

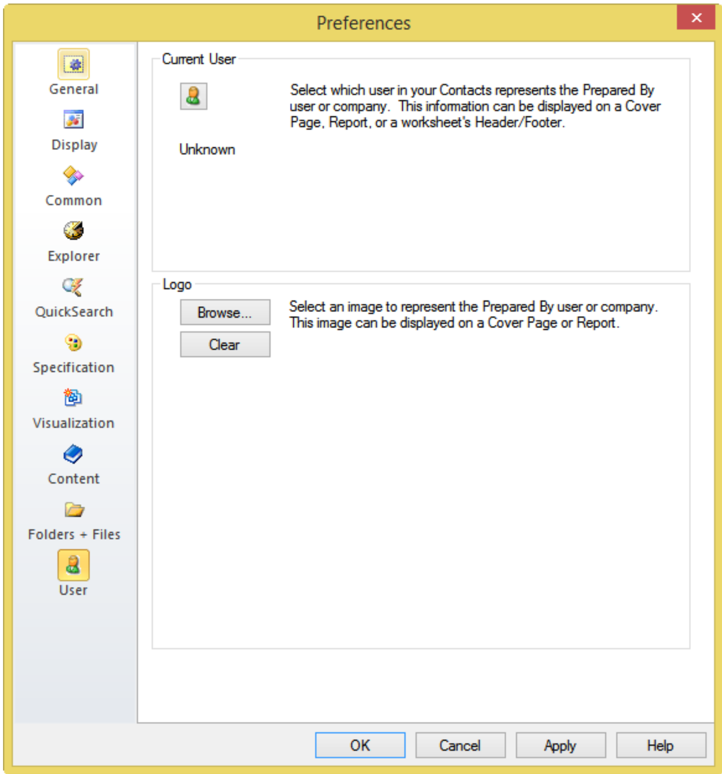
QuickSearch index	Select the location of the index accessed by QuickSearch in Explorer and Worksheet.
Search keyword index	Select the location of the index accessed by Search in Explorer and Worksheet.
Contacts database	Select the location of the Contacts database.
Default Options file	Select the location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

User preferences

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

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

2. Click **User**.

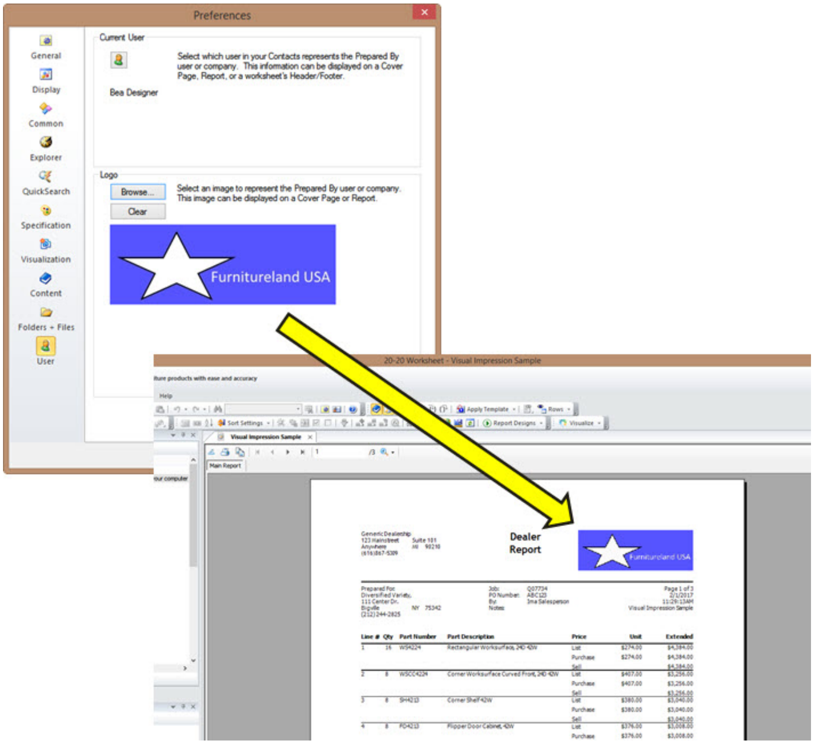


3. Click the button under **Current User**.

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

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

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 Custom catalogs section.

See:

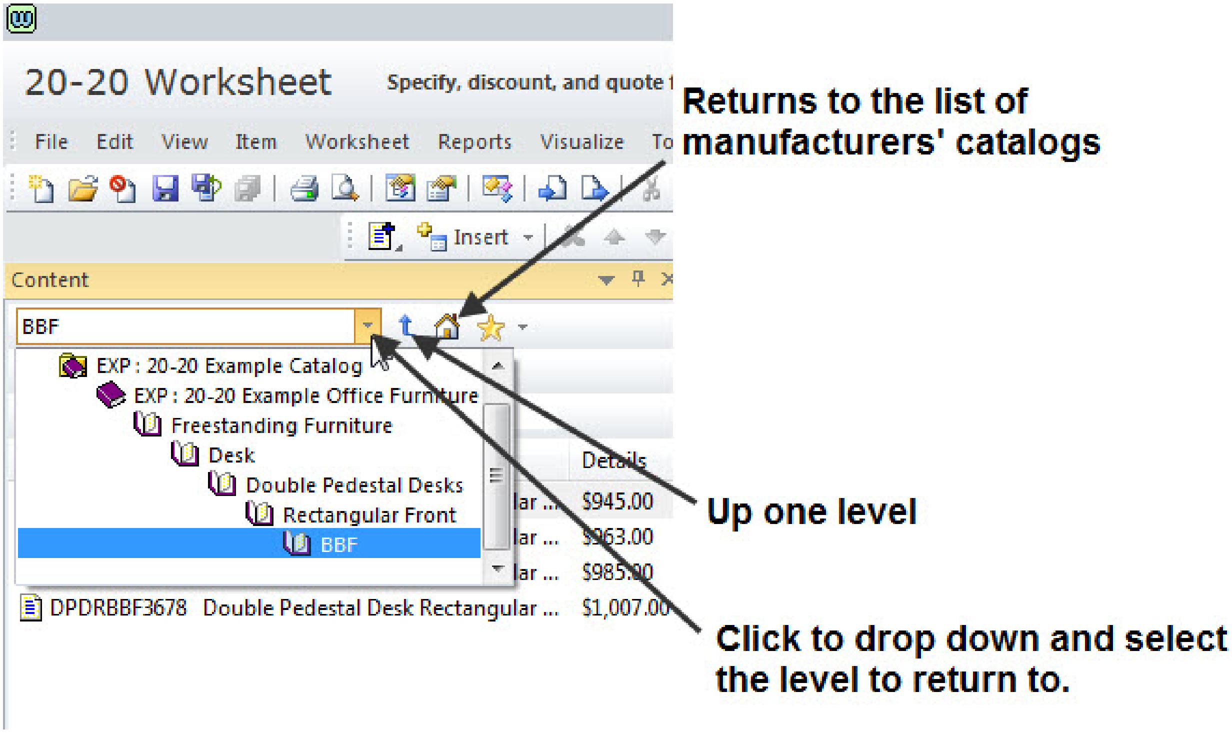
- Navigate catalogs
- Catalog Properties

Navigate catalogs

1. From the **Content tab** 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 Add products using drag and drop.

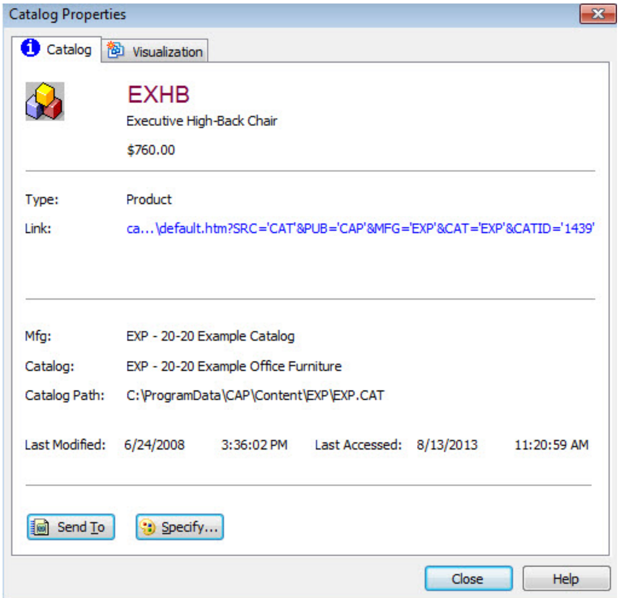
To move around in Explorer use the three navigational features: up one level, **Home**, and the drop down arrow. These help you move quickly to a section within the **Content** tab.



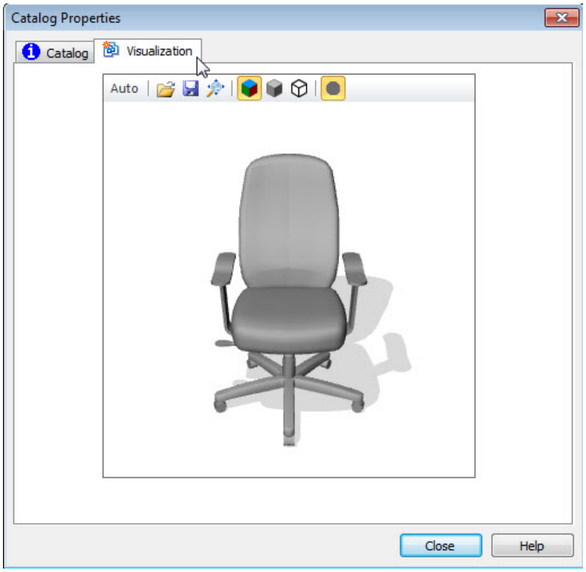
Notes: To save time, you can bookmark manufacturers, catalogs, sections or products you use frequently. You can display the Content in tree view instead of list view if you prefer. See Explorer preferences for details.

Catalog Properties

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



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



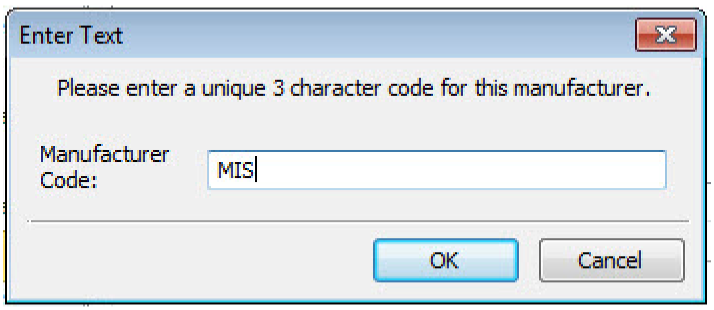
From the **Catalog Properties** window (**Catalog** tab) you can:

- 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

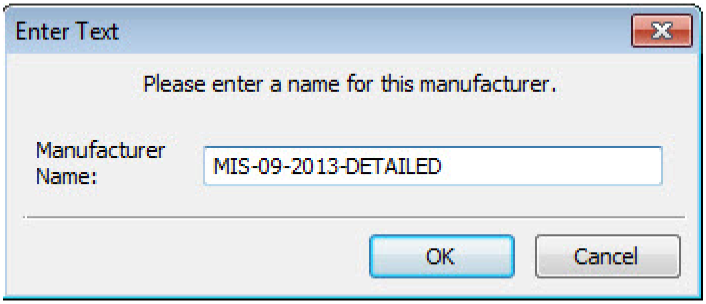
CAP Designer and 2020 Worksheet allow you to use multiple versions of the same catalog. This allows you to create worksheets using the current catalog and others using older catalogs. You can even put products from different versions of the catalog in one worksheet.

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.

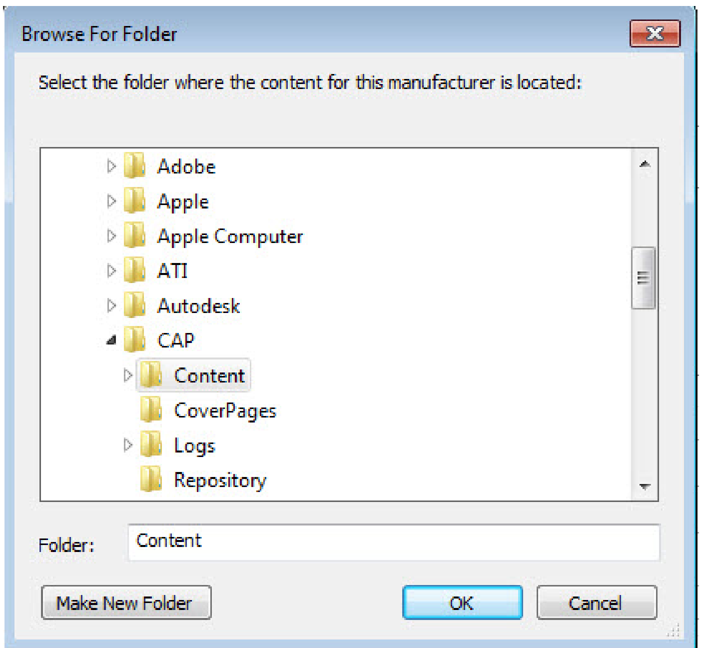


6. Enter the manufacturer name.

   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.



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



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**, **Content** then using the  button.

Note: See Add products from an archived catalog 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 Content tab of Explorer, right-click the manufacturer, catalog, section or product number that you want to bookmark.

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

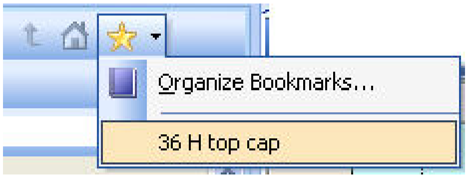
2. Click the **Add Bookmark** icon beside the **Home** icon.

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 catalog update, the bookmark will no longer work.

Organize bookmarks

Organizing bookmarks 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 Folders and files preferences.

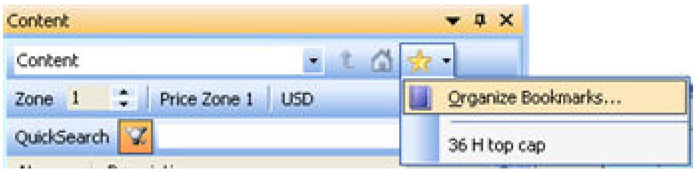
By default, content (manufacturers, catalogs, sections, or products) bookmarks are saved under the **Content** folder. Drawing bookmarks are saved in the **Projects** folder. Worksheet bookmarks are saved under the **Worksheets** folder.

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

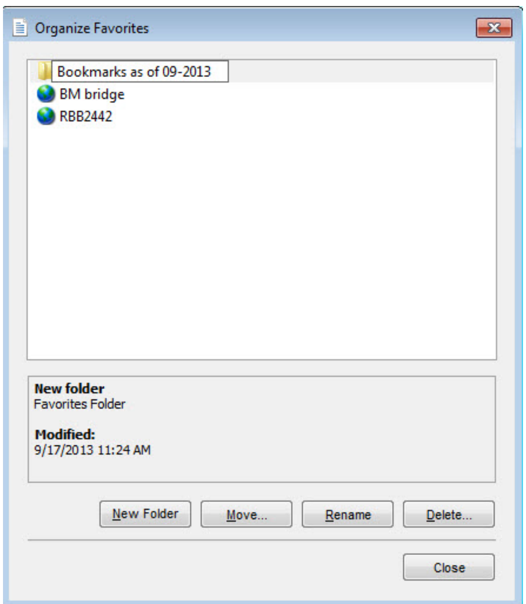
1. In the Content tab of Explorer, right-click the manufacturer, catalog, section or product number that you want to bookmark.

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

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



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



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 Content tab:

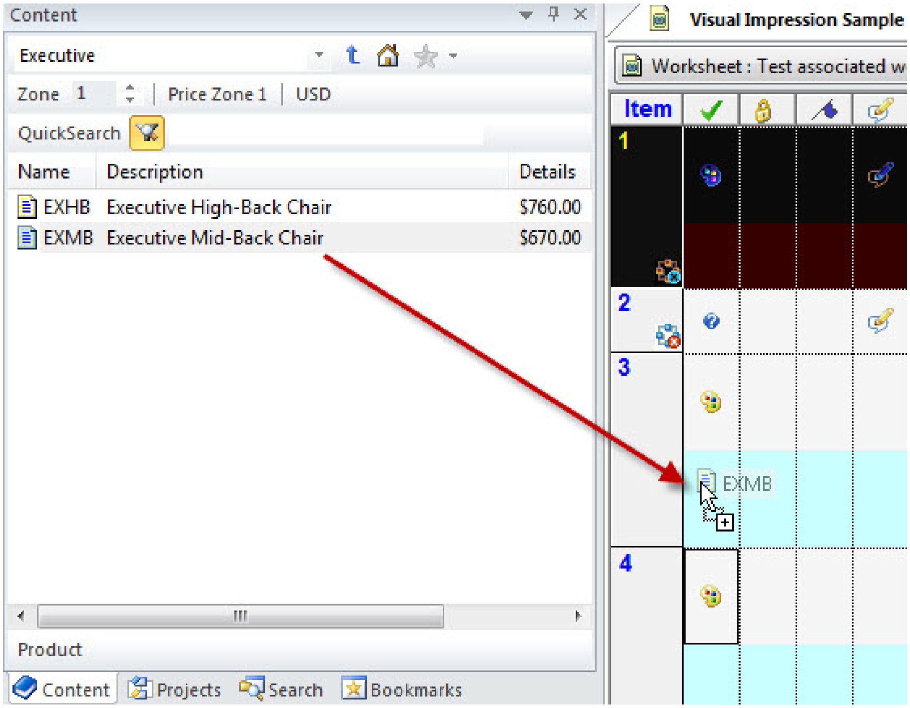
1. Navigate your way down to a part number used in a specification.

   Or, use QuickSearch or Search 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 Preview bar. 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 2020 Options 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, you can add service parts to the worksheet. See Add service parts.

Add products using Insert

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

1. Click Insert on the Item toolbar 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.

   Quick Search 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

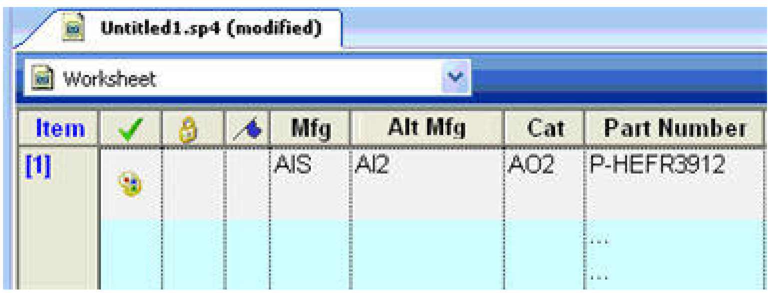
Note: If you want to see preview images for items, run the Update Preview Images command.

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 Use multiple versions of the same catalog for instructions on archiving a catalog.

1. Add the product from the archived catalog. You can drag and drop from the Explorer bar or use Insert.
2. Display 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.

   The Alt MFG value is important because it is used when doing an Update against catalog. 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 Assign, or Block Assign. 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 flagged and a question mark is displayed in the **Complete** column.

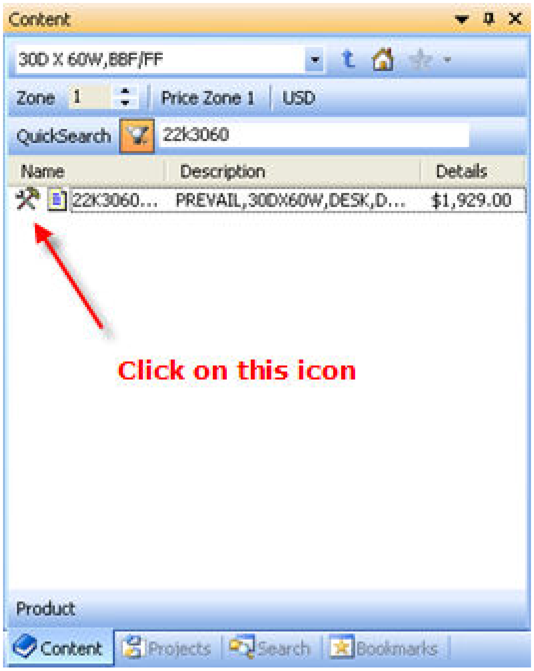
Add service parts

You can add service parts from Kimball or National through the **Worksheet** area or from the **Content tab** of **Explorer bar**.

From the Content tab:

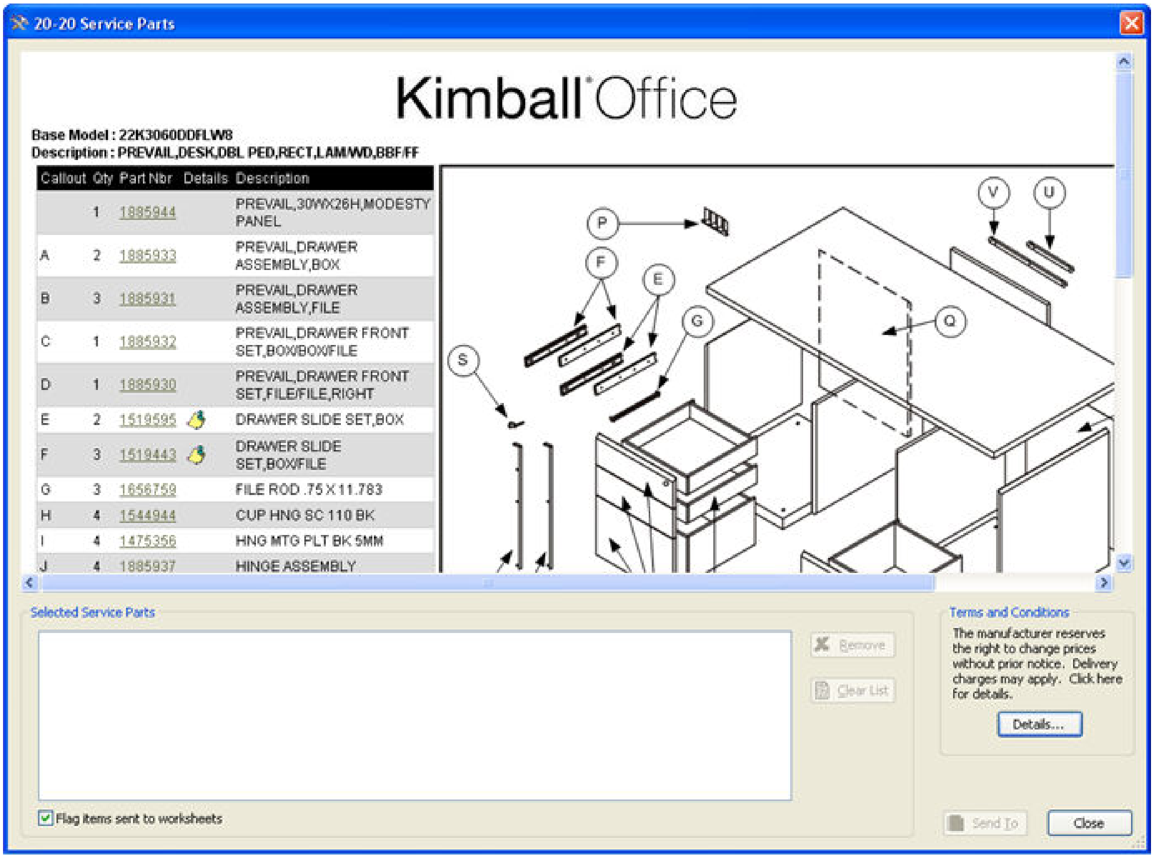
1. Navigate your way down to a part number used in a specification. Or, use QuickSearch or Search to find a product.

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.

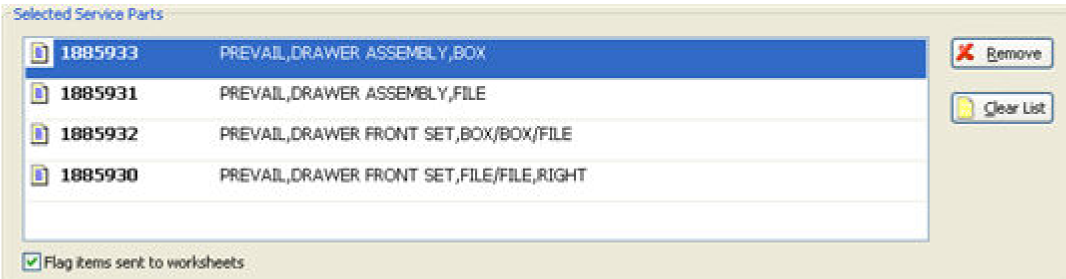


4. Click on a service part number to add it to the **Selected Service Parts** list.

If you see a **Note** icon  next to the part number, you can click on it to read any notes about that part.

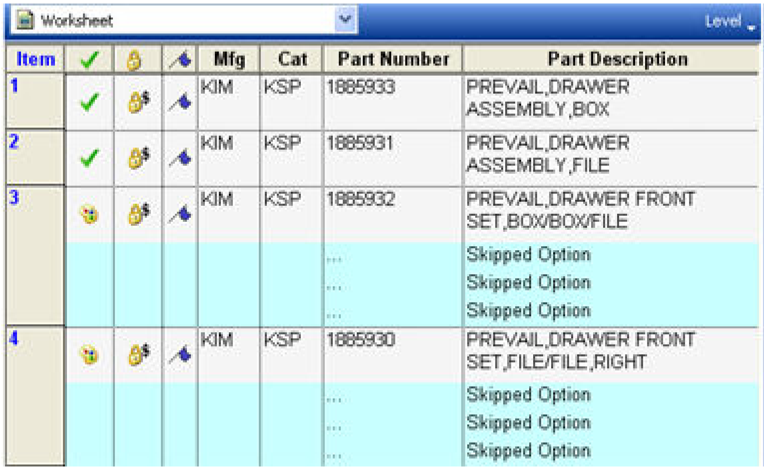
5. Add other parts if necessary. If you want to remove a selected service part, select it then click **Remove**.

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



6. By default, items sent to worksheets will be flagged. 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.



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

From the Worksheet area:

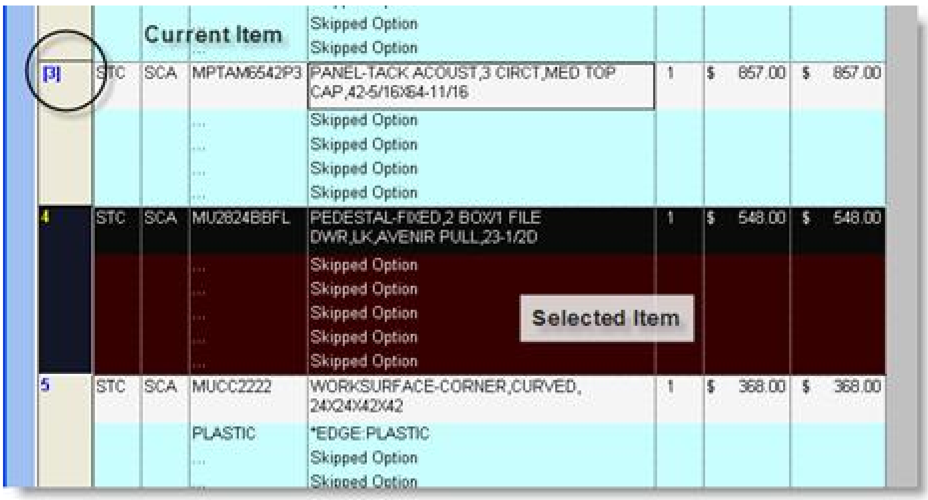
1. Select or make the line item current.
2. From the **Item** menu, choose **Select Service Parts**.
3. Follow steps 3 to 6 above.

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 current and items that are selected.

When performing edit commands, 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 cut command will cut the selected line item.



See also Special selection tools

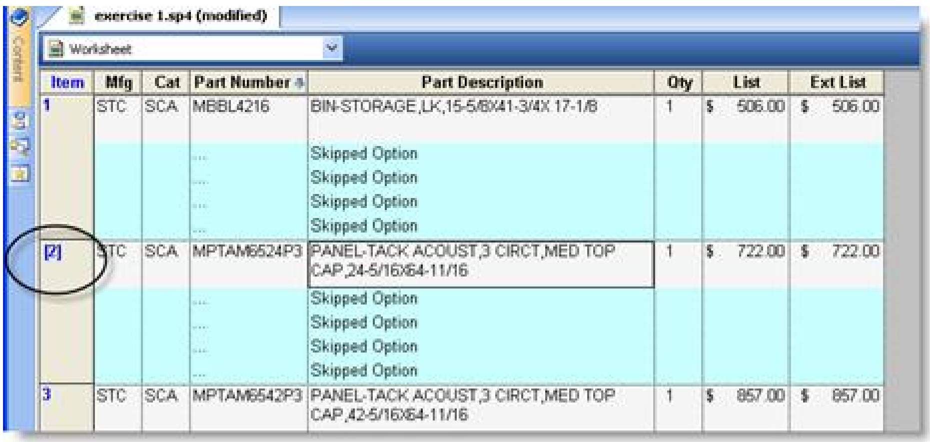
Current item

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**.

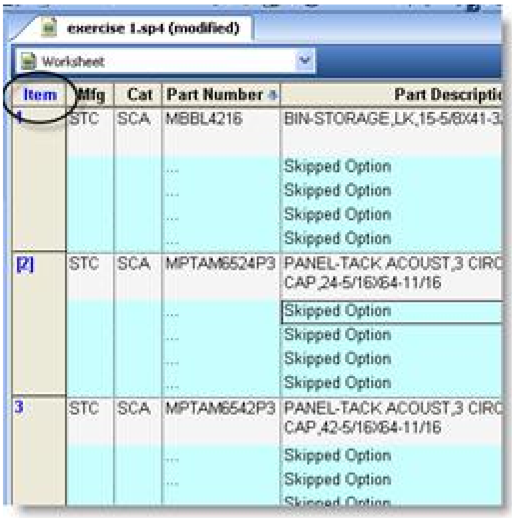
To make an item current:

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.



To clear the current item:

Click on the **Item** column heading.



See also:

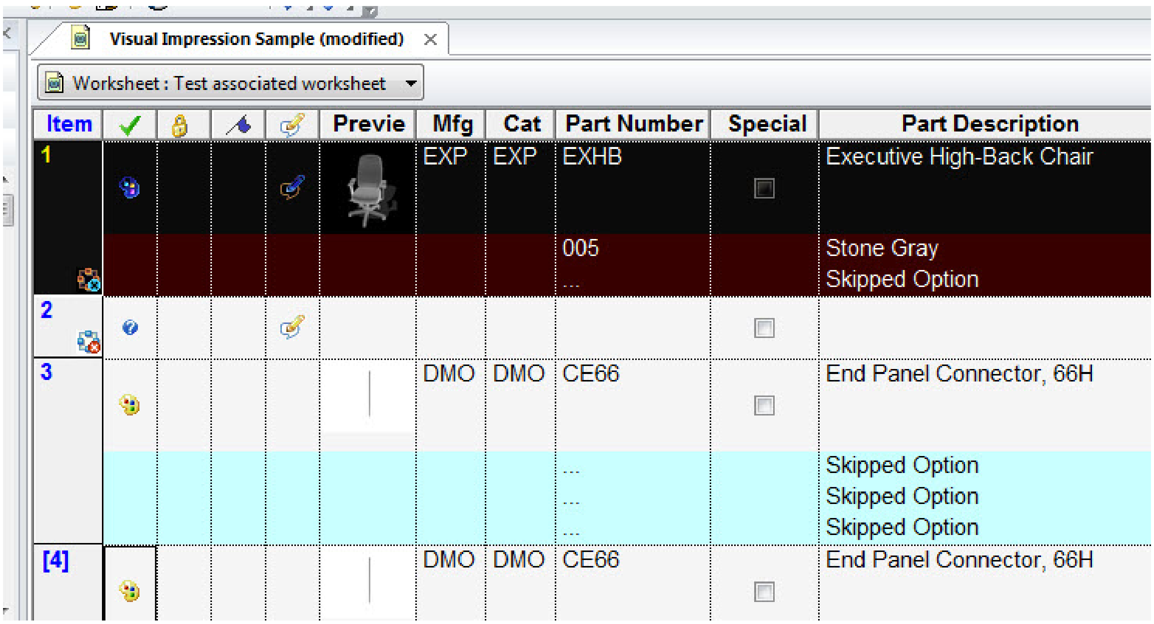
- [Select items]
- [Special selection tools]

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.



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 clicking the **Item** 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 Locked or Complete/Incomplete 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 print 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. Select an item or make an item current.

   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. Make a line current 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 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, option, attribute, worksheet link, standard, outline level, subtotal, or price adjustment.

In addition, you can also delete:

- both the options and attribute lines in the current item
- the pricing information in the current item
- all subtotal lines in the worksheet

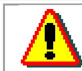
To delete an item:

1. Select an item or make an item current.

   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	To
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 quick 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.

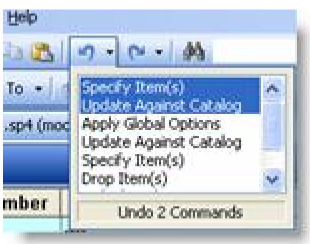
Undo an action

To undo the last action:

Click  on the Standard toolbar.

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 .

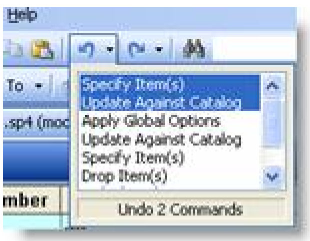
Redo an action

To redo the last action:

Click  on the Standard toolbar.

To redo more than one action:

1. Click the arrow next to the **Redo** icon in the Standard toolbar 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**.

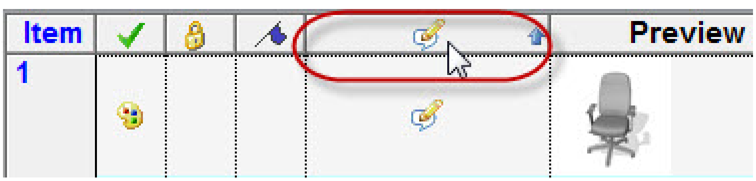
Go to an item's location in Explorer

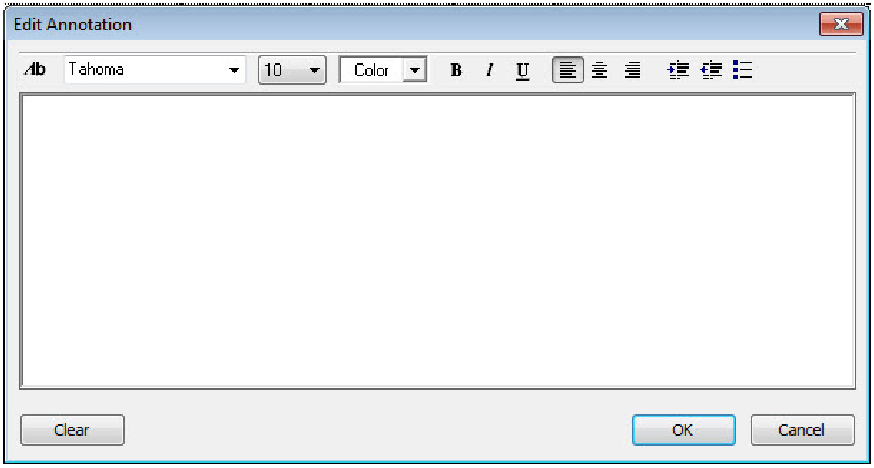
1. Make the item current in the worksheet.
2. Right-click and select **Explore** to go to the product's location in the Content tab.

   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.





Sort records by column

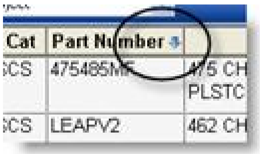
Lines on your worksheet can be sorted by one column or by multiple columns.

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 subtotals 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.



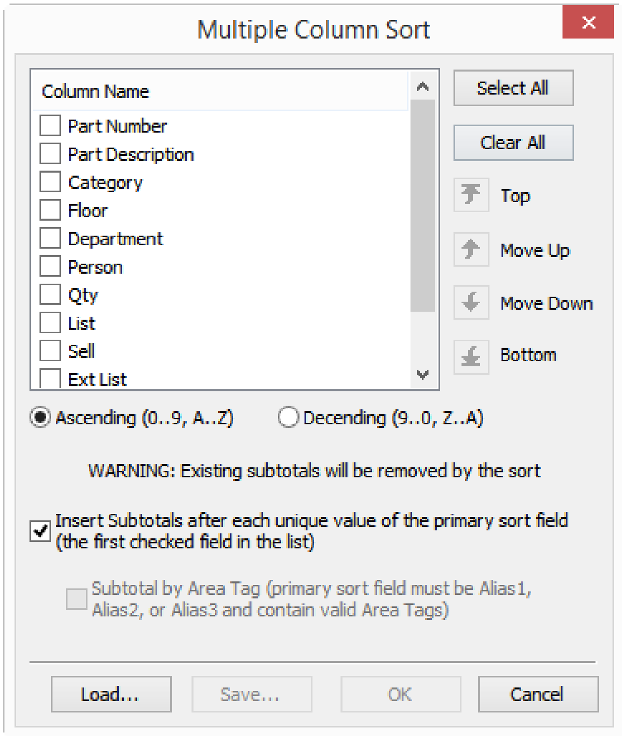
See also:

- [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  on the **Worksheet** toolbar.
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.


Multiple Column Sort
Column Name
Part Number
Part Description
Category
Floor
Department
Person
Qty
List
Sell
Ext List
Select All
Clear All
Top
Move Up
Move Down
Bottom
Ascending (0..9, A..Z)
Decending (9..0, Z..A)
WARNING: Existing subtotals will be removed by the sort
Insert Subtotals after each unique value of the primary sort field (the first checked field in the list)
Subtotal by Area Tag (primary sort field must be Alias1, Alias2, or Alias3 and contain valid Area Tags)
Load...
Save...
OK
Cancel

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

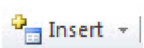
5. If you want to **Insert subtotals after each unique value of the primary sort fiel**d, check the box.

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 Update Against Catalog. Attribute lines can also be displayed or hidden in a worksheet.

1. Make a product line current in a worksheet.

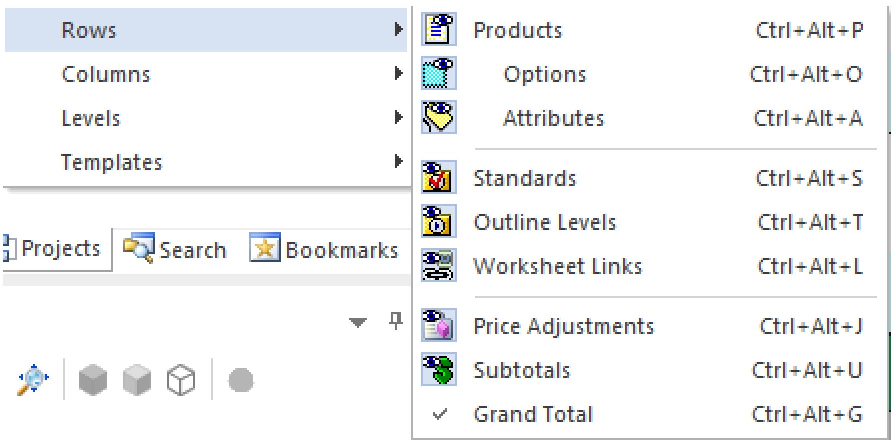
2. Click 

 on the Item toolbar then select **Attribute**.

3. A yellow line will appear below the options.

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

To display or hide Attribute lines, click the Rows dropdown in the [View toolbar](#) and select **Attributes.**



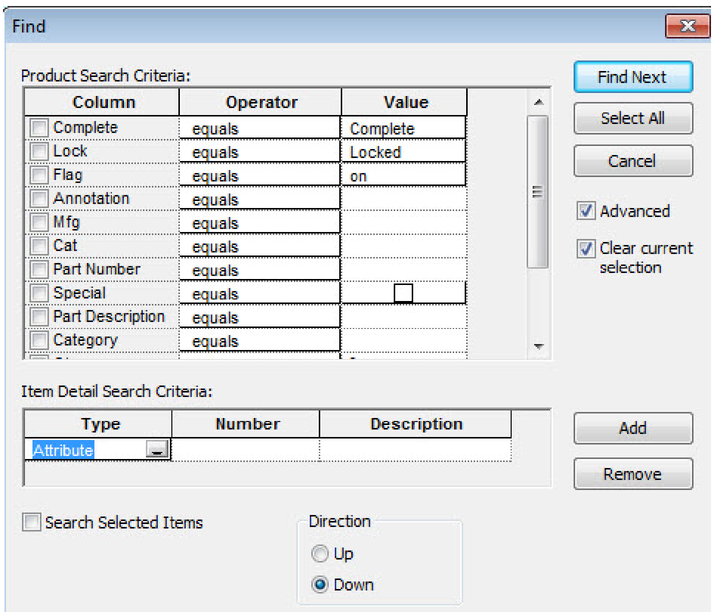
See also:

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



5. Click **Find Next.**

Custom items (Specials)

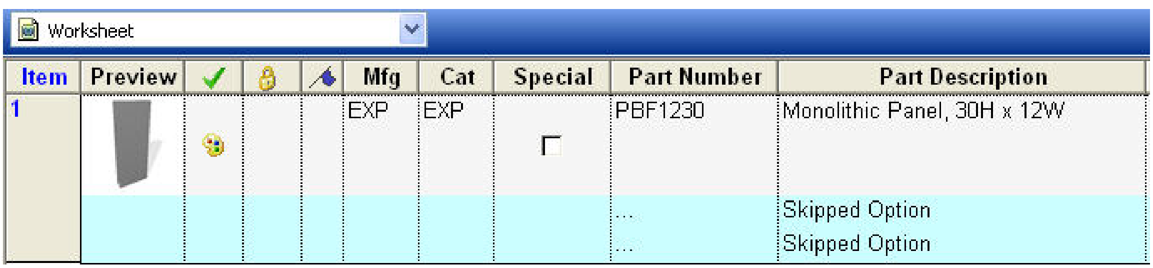
You can create custom items if a product is not found in a catalog, or if a standard product needs to be adjusted in some way.

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

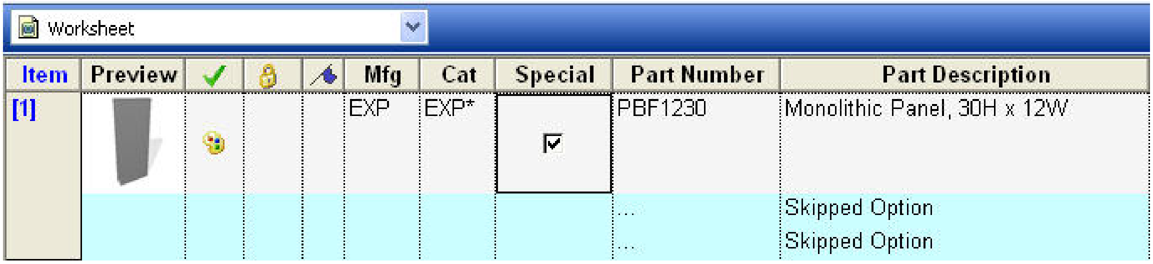
1. Customize your columns in order to display the **Special** column. It is recommended to move it next to the **Cat** column.



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

4. Change the options — 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.



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 lock the line item to protect it from any mistaken changes.

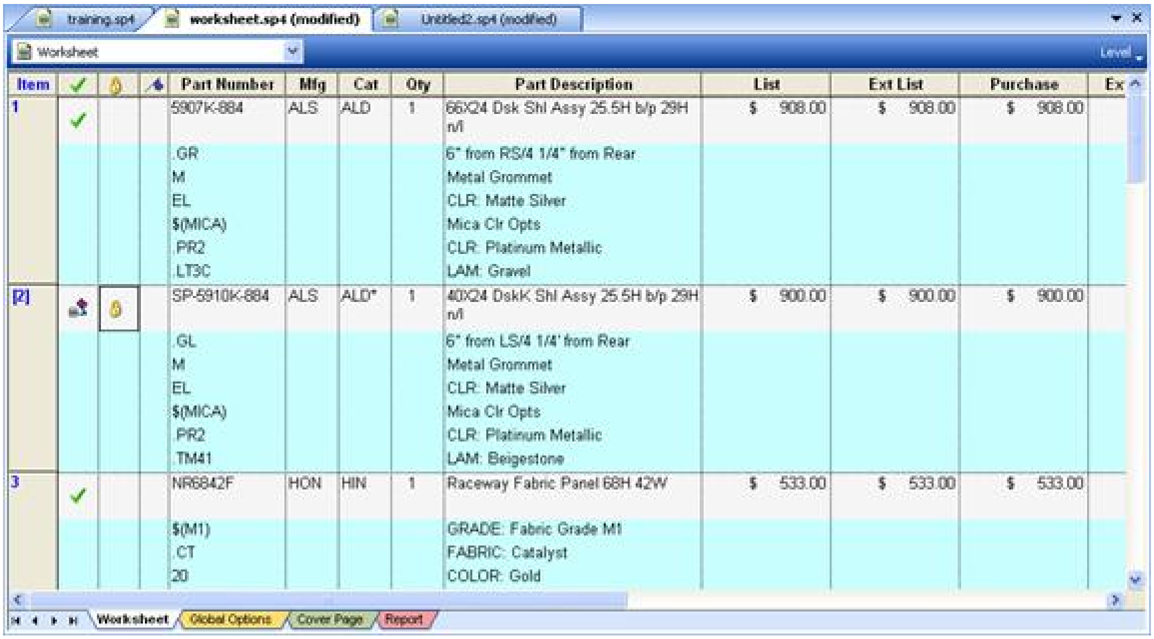
Because the **CAT** code has been changed, if you do an Update Against Catalog this line item will be ignored. Also, you cannot specify options for this custom item.

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 on the [Item toolbar](#) then select **Product**.
2. Type the information about the special in the blank line.



3. Once all changes are made, it is a good idea to [lock](#) the line item to protect it from any mistaken changes.

See also: [Insert blank options and attributes](#).

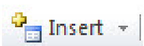
Note: The icon in the line item's **Complete** column will indicate that it needs to be updated against the catalog. You will **not** want to do this because Worksheet will flag this item as unknown and you may no longer be able to find the item in the worksheet.

Insert blank options and attributes

You can add a blank option 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 current.
2. Click 

on the Item toolbar then select **Option**.

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

Item properties

Once you have added options or discounted your worksheet you can display columns 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 Standard or an Outline level.
Visualization: change the image displayed in the **Preview** column. Change the preview image (see Preview a product) 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**.
5. 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.

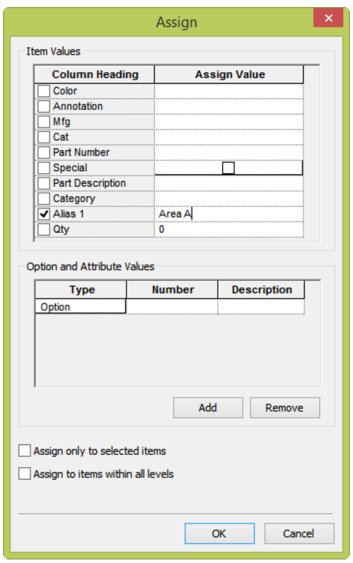
7. If you want to **apply within all levels** (standard and outline levels) check the option.
8. Click **OK**.

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.

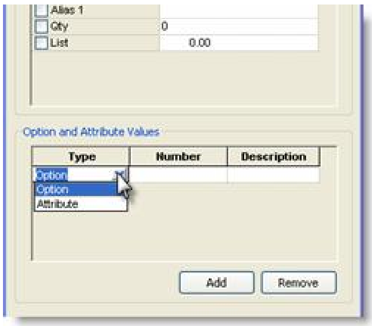
Example - assign values to the **Alias 1** column:

1. Turn on 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.



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.

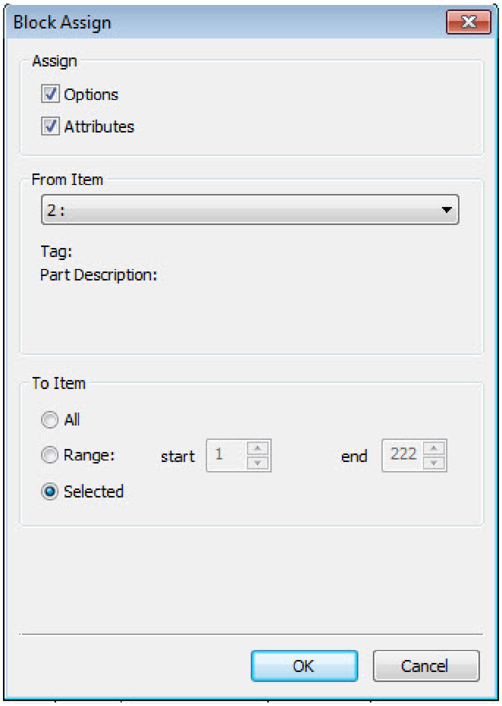


Copy options and attributes (Block Assign)

Block Assign will copy the options and/or attributes 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.



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.

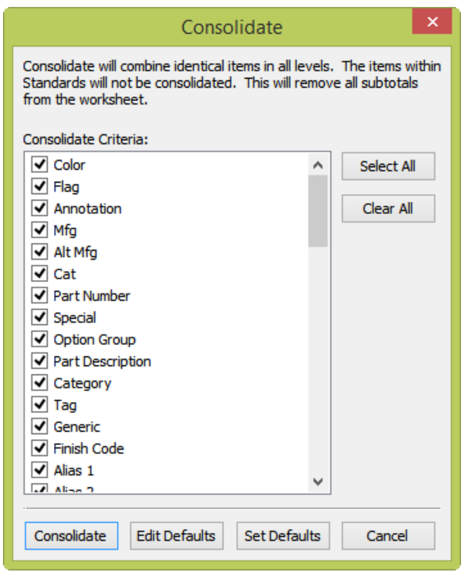
8. Now that the options have been assigned, do an update against catalog.

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  on the 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.



3. Click **Consolidate**.

See also: Split an item

Note: Any items that are optioned or discounted 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**, **Common**.

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

Split an item

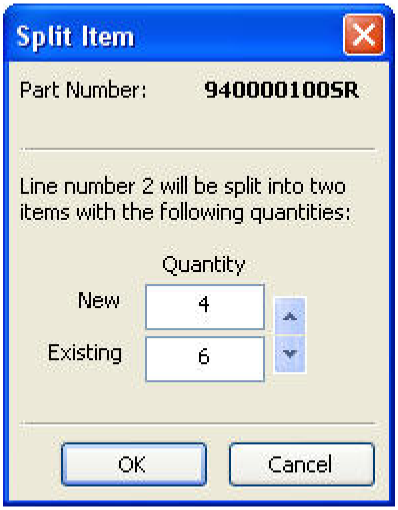
Split separates one line item into two identical items and updates the quantity. Instead of copying and pasting a line then changing the **Qty**, Split is a quicker way of accomplishing the same task.

1. Make the item current.

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

Item	✓			Mfg	Cat	Qty	Part Number
1	✓			STC	CS1	1	940000100SR
[2]	✓			STC	CS1	10	940000100SR
3	✓			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.



4. Click **OK**.

Item				Mfg	Cat	Qty	Part Number
1	✓			STC	CS1	1	940000100SR
[2]	✓			STC	CS1	4	940000100SR
3	✓			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 Complete column, 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 Worksheet 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 **Flag 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 optioned. 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  on the Worksheet toolbar.
5. Under **Worksheet to Update Against**, type the path and file name of the Master worksheet or click  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 Update Against Catalog 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 Merge, Import and Send To 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 standard or outline level in your worksheet, you need to use the **Step In** command to view its contents, then use the **Update Preview Images** command.

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

<table>
<tr><th>To:</th><th>Do this:</th></tr>
<tr><td>Change the preview image of the displayed item</td><td>1. If necessary, make changes to the preview image.

See Preview a product for details on what you can do with preview images.
2. Click Update This Image For Item Preview to change the preview image of the current item displayed.
3. Click Next Item to go to the next item.
4. Click Close.</td></tr>
<tr><td>Retrieve the preview image of items that have an empty Preview column</td><td>1. If you want to replace existing images with their default image, rotation and zoom magnification, check Replace existing images.
2. Click Update All to retrieve the preview image of items that do not have an image.

This button changes to a Stop button during the update. Click Stop if you want to discontinue updating.
3. Click Close.</td></tr>
</table>

Reset the preview image of items on the worksheet back to the default image, zoom magnification and rotation	1. Check **Replace existing images**. 2. Click **Update All**. This button changes to a Stop button during the update. Click **Stop** if you want to discontinue updating. 3. Click **Close**.

Flag and lock lines

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

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

See:

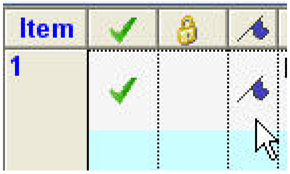
- Flag lines
- Flag by criteria
- Lock lines
- Lock by criteria

Flag lines

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

To flag one item:

Click in the **Flag** column.



To flag several items:

[Select](#) the items then click  in the [Item toolbar](#).

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.

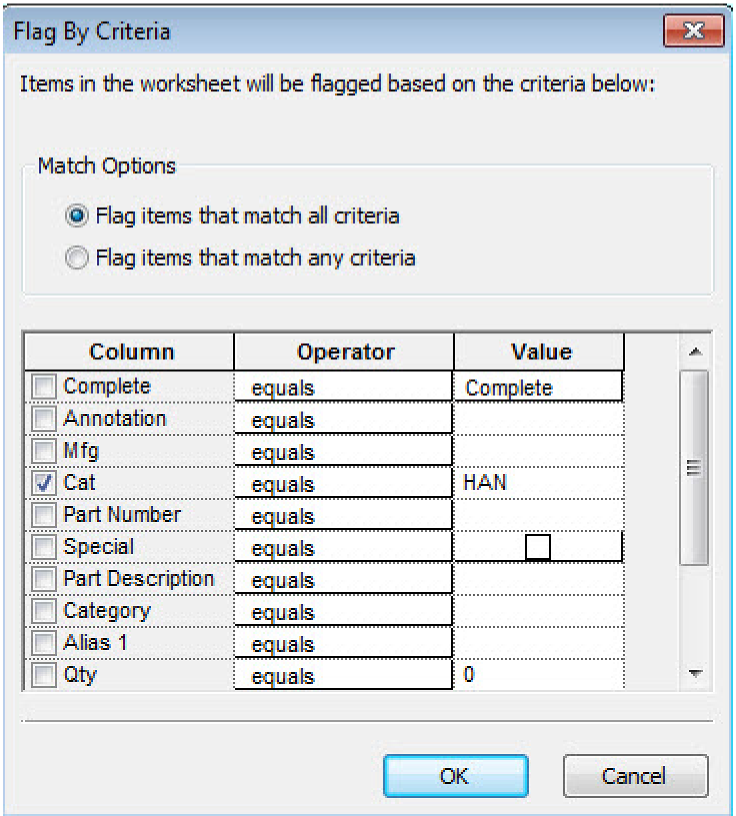
The Flag status can also be controlled from the **Item** menu. From here you can also go to the previous or next flagged item, clear all flags or [flag by criteria](#).

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.



All the items from that catalog will be flagged. You can select these flagged items 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 export the worksheet to SIF, the line is **not** included in the order. Also, a locked line is not optioned by Global Options or updated by an Update against catalog.

To lock one item:

Click in the **Lock** column.

To lock several items:

1. Select a few items in the worksheet.

2. Click  on the Item toolbar. 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 lock by criteria.

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

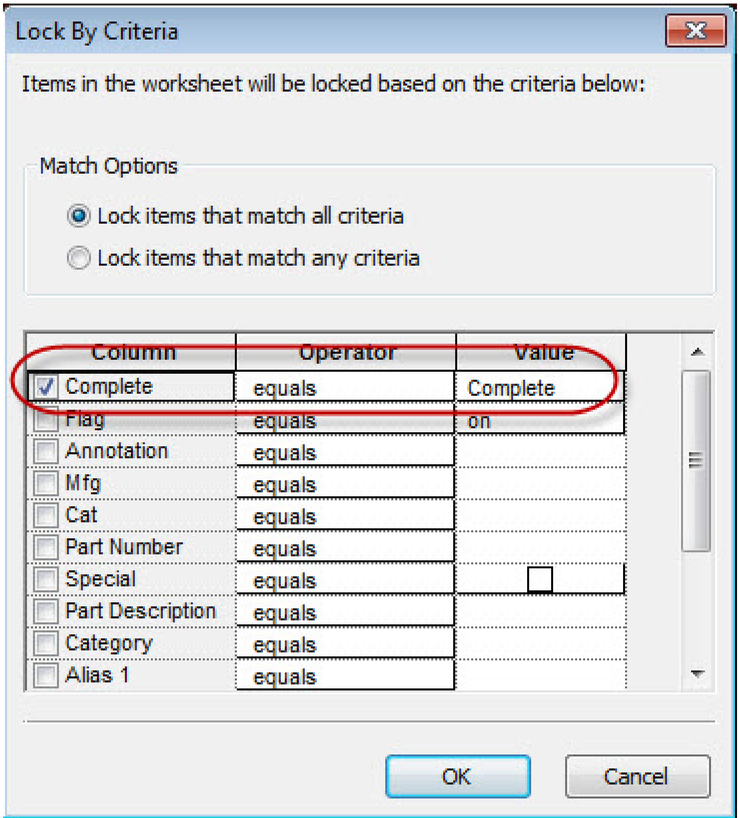
Lock by criteria

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**.



Send an item

You can send a worksheet item to:

- another worksheet
- a drawing
- a custom catalog

Send to a worksheet

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

1. Select an item or make an item current in your worksheet.
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 Explorer bar, you can also access the **Send To** menu. For example, you can send items from your Custom Catalog.

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. Select an item or make an item current 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 Explorer bar, you can also access the **Send To** menu. For example, you can send items from your Custom Catalog.

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 on the Standard toolbar.
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 Standard toolbar 

. You can also search for a string by entering a value here.

Use Advanced Find to select items

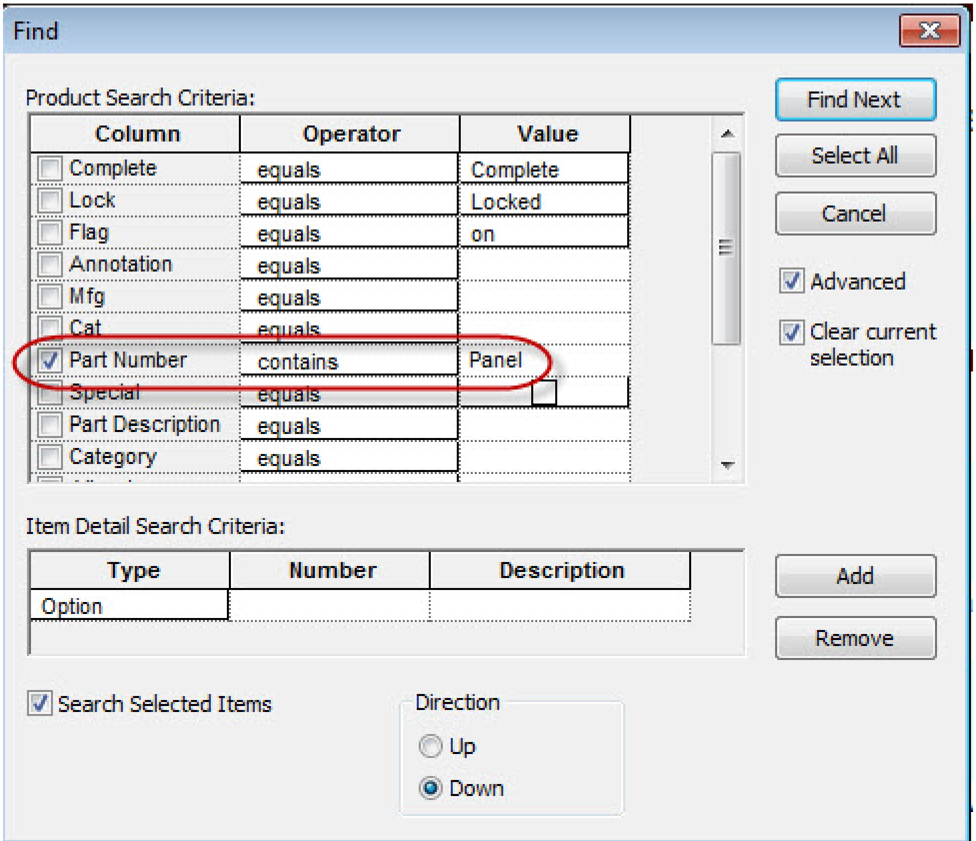
When your worksheet is small it is easy to select the items you need for editing or updating. How can you quickly select a group of items if you have 70 line items on your worksheet?

Example: select panels in the worksheet

1. Make sure that you have at least one panel in your worksheet.
2. Click  on the Standard toolbar.
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`.



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.**

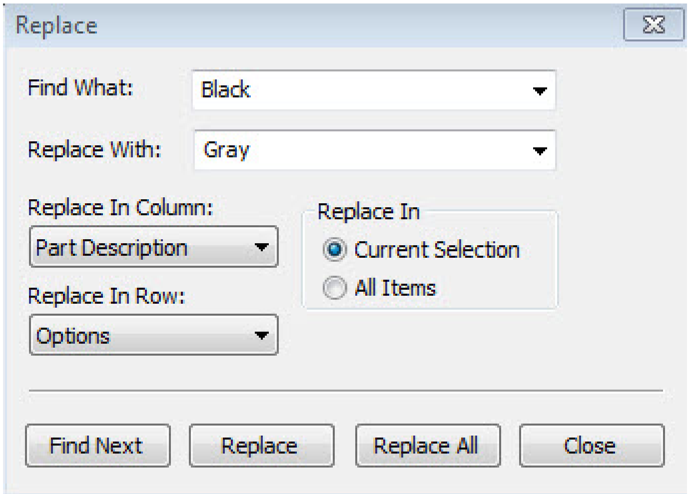
Note: You can also do the same thing using Select by Criteria.

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 Standard 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**).



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 Content tab of the Explorer pane and from the **Part Number** field in the worksheet area.

See:

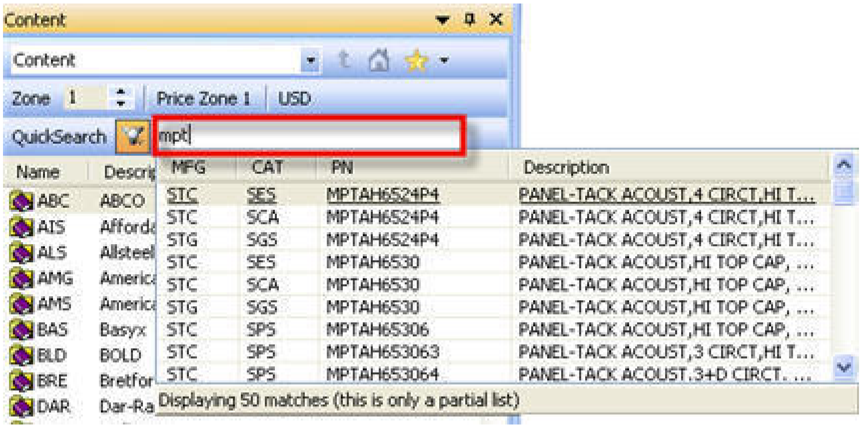
- Use QuickSearch from the Content tab
- Use QuickSearch from the Part Number field
- Filter QuickSearch

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

Use QuickSearch from the Content tab

1. In the Content tab of the Explorer pane, 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.



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 Filter QuickSearch.

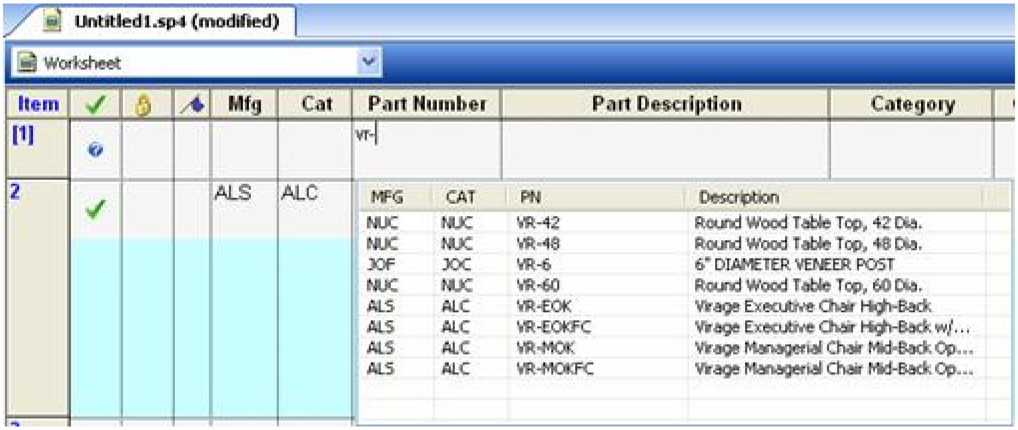
2. Select an item from the list by **double-clicking** on it.

Note: QuickSearch displays a maximum of 50 matching parts. You can change this number in the Preferences dialog. See QuickSearch preferences for details.

Use QuickSearch from the Part Number field

1. In the worksheet area, 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.



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** QuickSearch preferences for details.

Filter QuickSearch

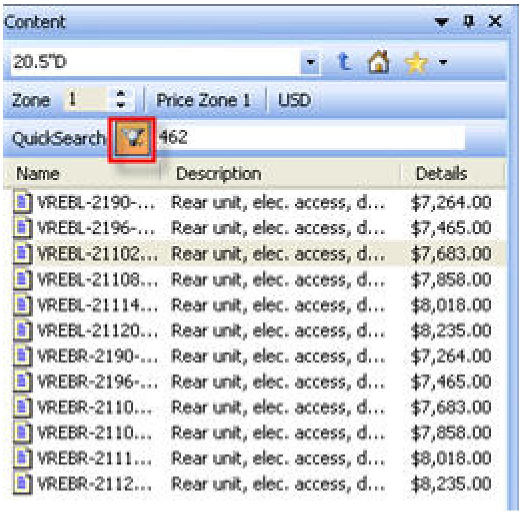
By default, the QuickSearch filter is on so that QuickSearch searches **only within the current level**. For example, if you navigated down to a catalog, only that catalog will be searched. If you navigated down to a section, only that section will be searched.

To turn the filter on or off, click the filter button  in the Content tab.

To see the difference with the filter on and off:

1. Navigate to a part number.

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.



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, custom catalogs, 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 Search tab.

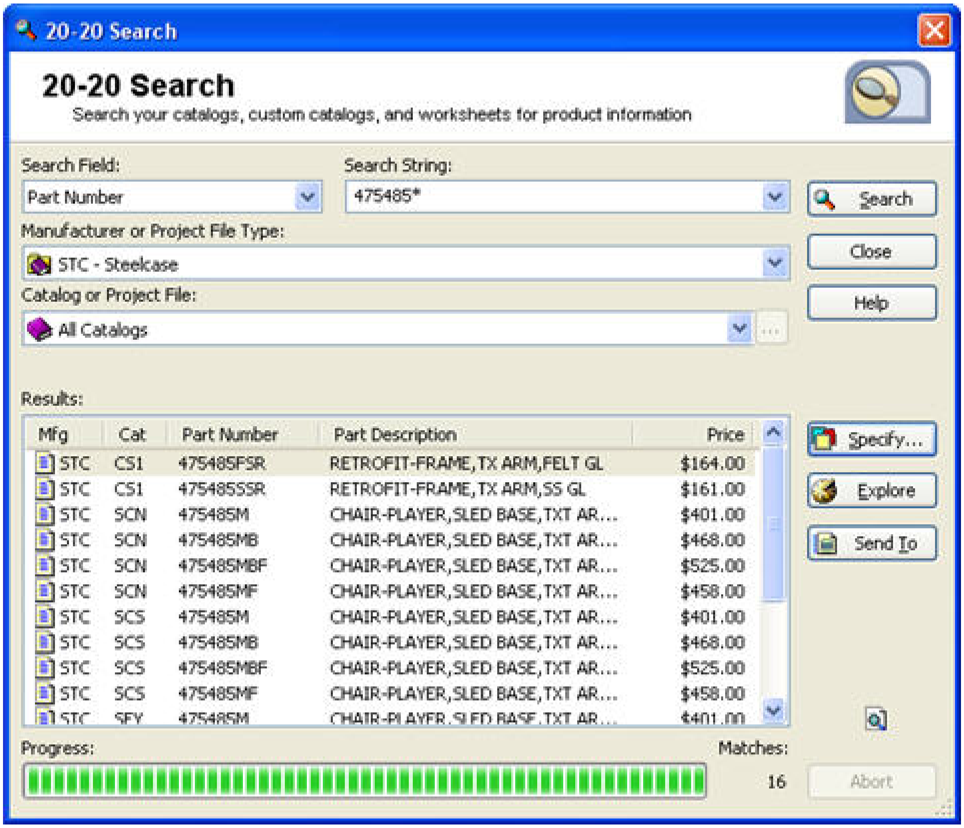
To access **2020 Search**, click  from the Tools toolbar or from the Search tab in Explorer.

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.



7. Hover over an item to select it.
8. Click any of the following:

Specify to launch 2020 Options, 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

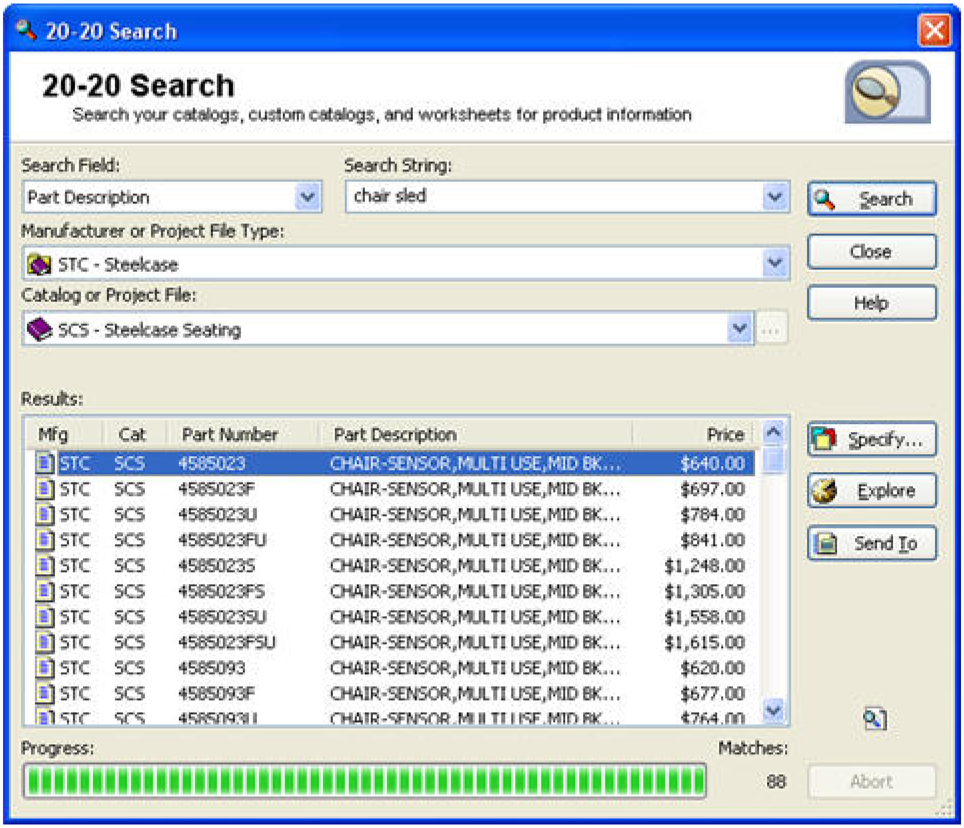
Note: The more catalogs you search through, the longer it will take. Click the **Abort** button if the search takes too long.

When you finish a search, search results are displayed in the Explorer Search tab. From here you can select products and send them into drawings or worksheets as you would from the Content tab.

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.



7. Hover over an item to select it.
8. Click any of the following:

   Specify to launch 2020 Options, 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 Search tab. From here you can select products and send them into drawings or worksheets as you would from the Content tab.

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:

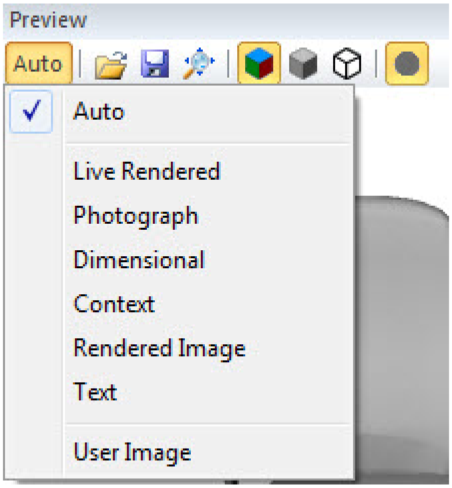
- Change the preview image type
- Rotate or move an image
- Zoom an image
- Change the ISO view
- Change the rendering mode
- Save the image
- Load an image

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 Visualization Preferences that has an available image.

2. Select the image type from the drop-down.

   All image types (except text) allow zooming in and out. In addition, if you choose the Live Rendered image type, you can rotate and move the image.

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
	Hiddenline Wireframe	view the image in a hidden-line wireframe rendering mode
	Greyscale	use the greyscale color palette when rendering
	AutoCAD colors	use the AutoCAD color palette when rendering

Note: The Preview feature displays an image using the default image type set in Visualization preferences.

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.

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

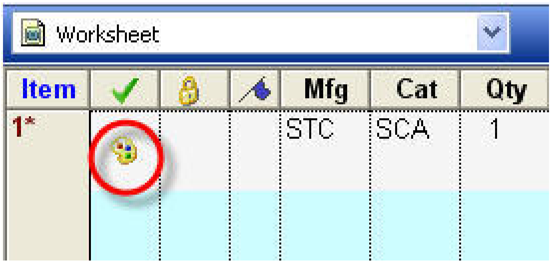
See also:

- 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:



You can also specify a product from any of the Explorer 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 Global Options to specify options for several items at the same time. See also Option Clipboard 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 option clipboard. 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 **Worksheet** 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**.

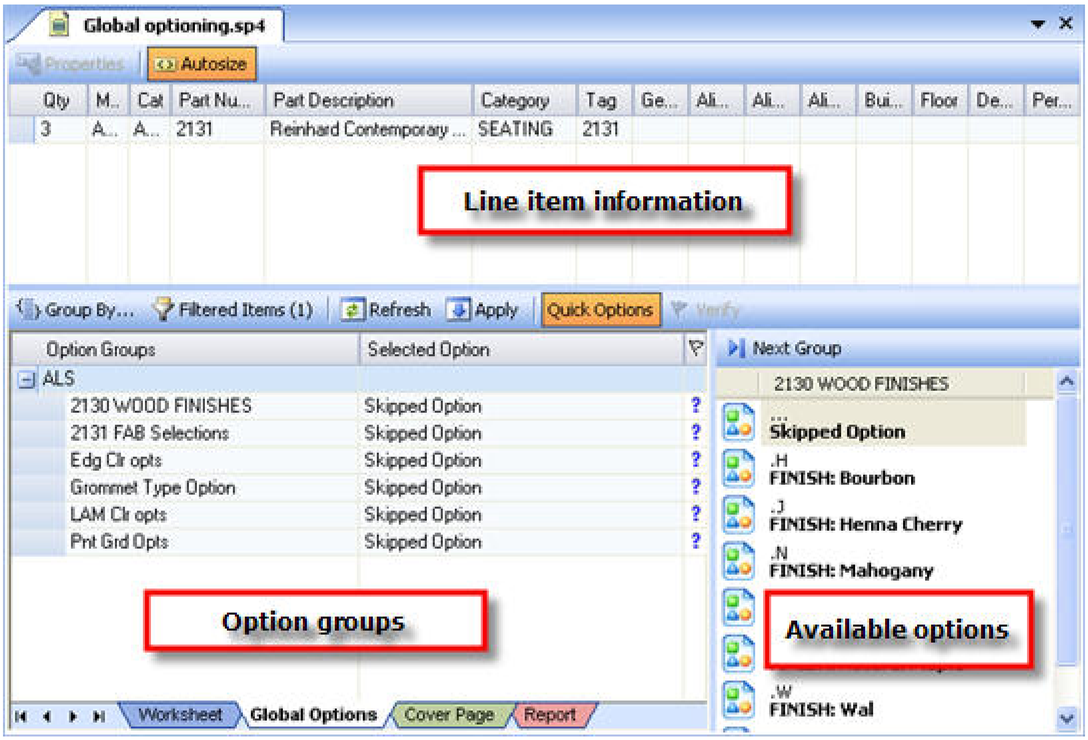
See:

- 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:

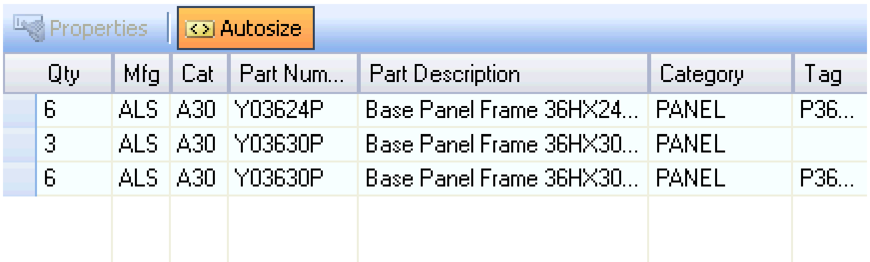
- Line item information
- Option groups
- Available options



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 Option groups 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.



Click the Filtered items 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:

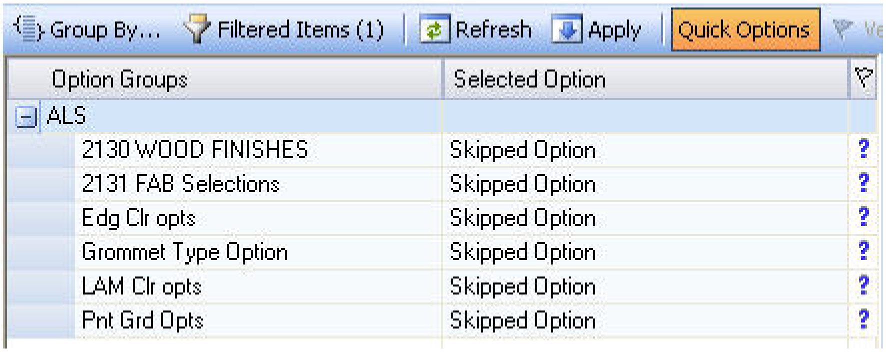
- Available options
- Select options using Global Options

Option Groups

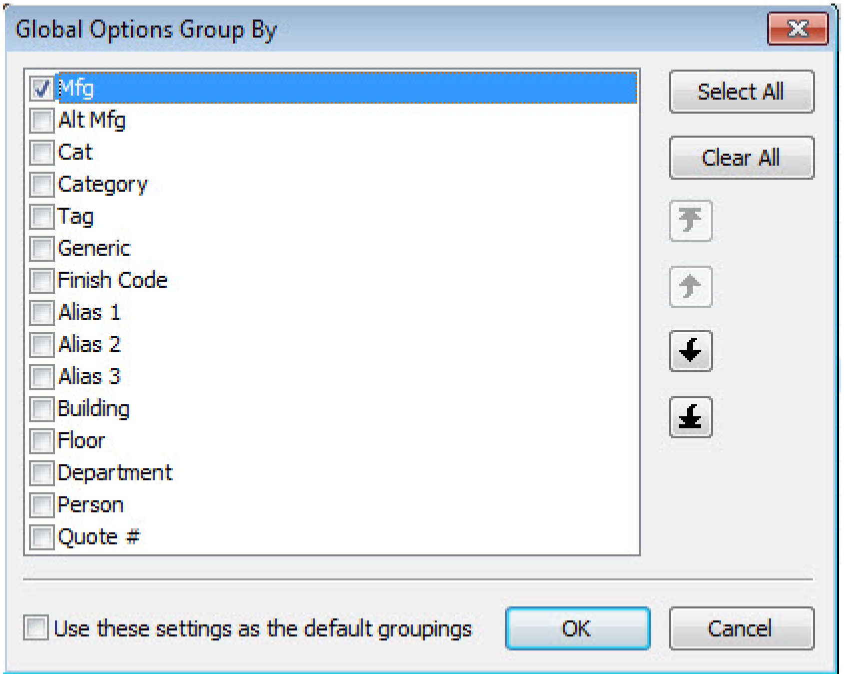
Option groups are the different types of finishes that need to be applied in a specification. By default, options are grouped by manufacturer code.

To group options by different criteria:

1. Click the **Group By** button in the Option Group area.



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.



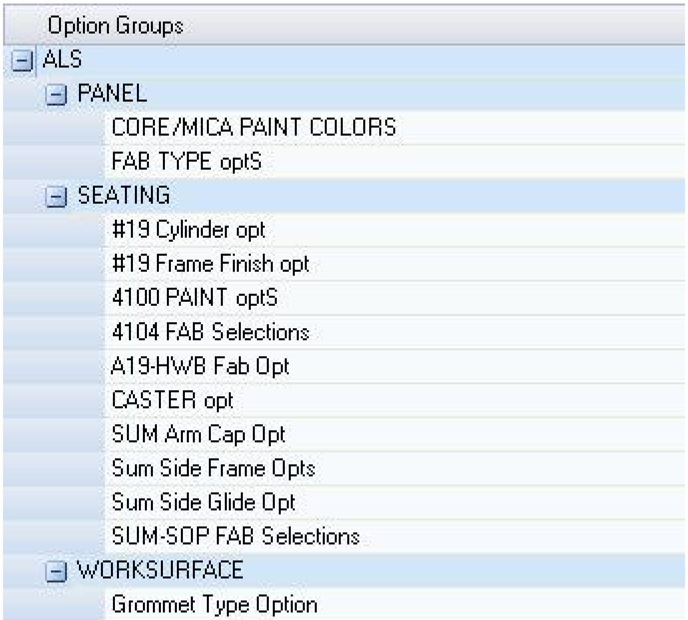
3. Change the sort priority by dragging the column.

   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.



Available Options

This window lists all of the available options for each option group 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:

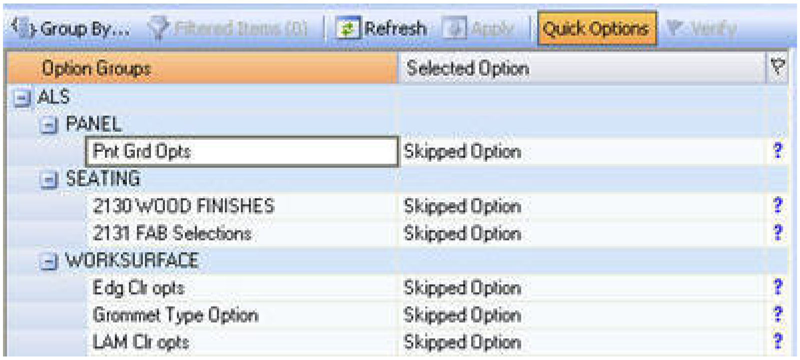
- Line item information
- Select options using Global Options
- Filtered items

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.

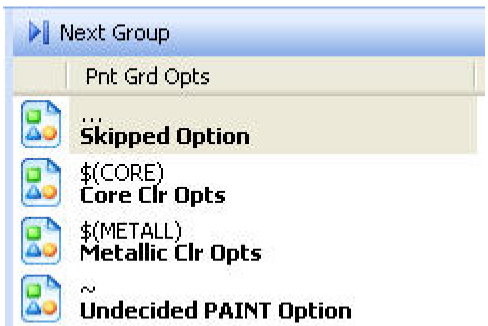
1. In the Global Options tab, click on the first option group in the listing.

   Note that a question mark under the **Flag** column shows that the option group is skipped or has not been selected.



The line item information area will tell you which line items in the specification will be receiving the selected option group.

2. Click on the desired finish in the Available Options area.



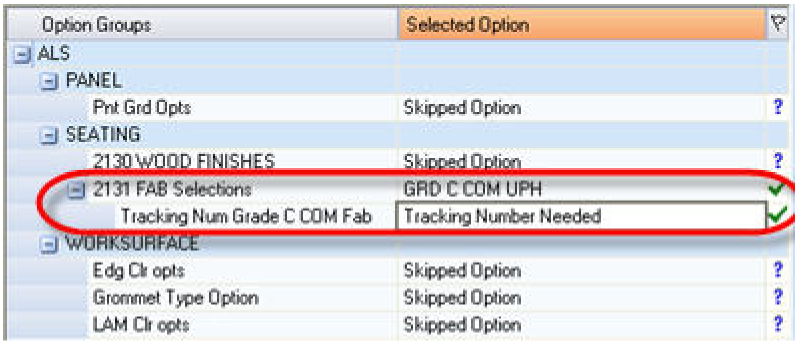
Some catalogs have option preview available.

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.



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 **Quick Options**. 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 enter the Global Options tab but if for some reason you chose not to refresh, this button will perform that function.

Verify options if Quick Options is on

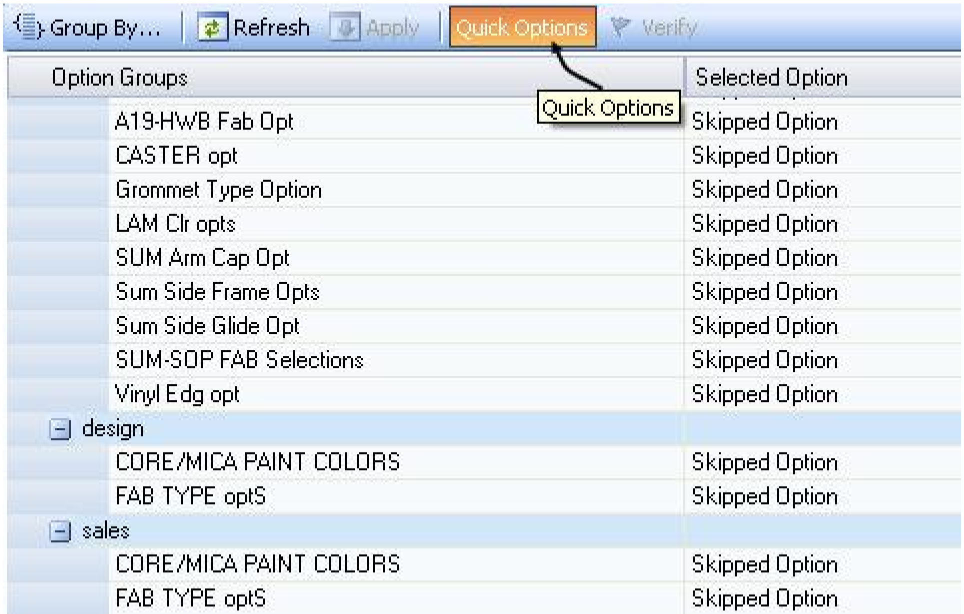
Quick Options allows the same option to be tentatively selected. This feature helps speed the selection process by looking for duplicate finish selections and applying the same finish.

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.

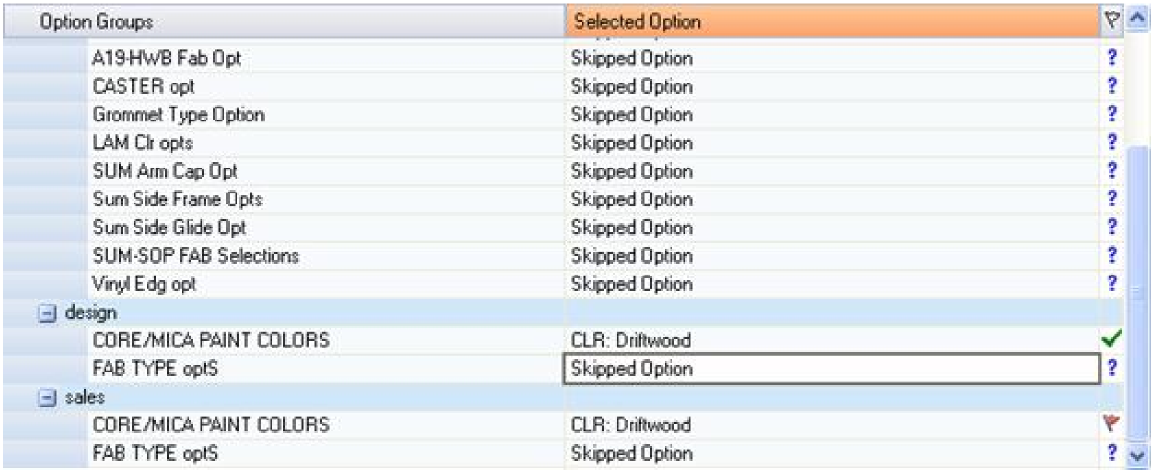
   The **Quick Options** button is a toggle - if the button is highlighted the feature is turned on. If it is the same color as the other buttons the feature is turned off.



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  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.



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.

Note: By default, **Quick Options** is automatically on. If you wish to change this setting, go to the **Tools** menu, **Preferences**, then click Specification.

Filtered items

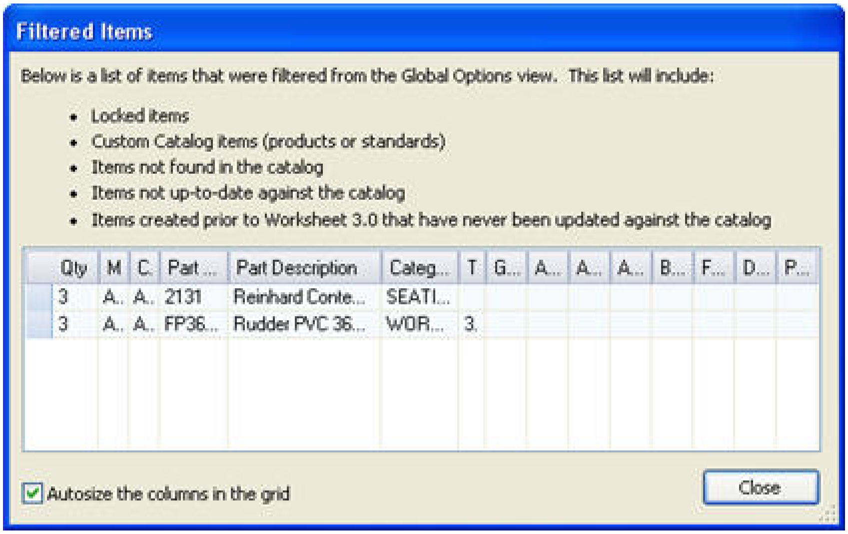
To prevent Global Options from updating certain items, they are filtered from the Global Options view:

- locked items
- custom catalog items
- items not found in the catalog
- items not updated against the catalog
- items created before Worksheet 3.0 that have never been updated against the catalog

To see the list of filtered items, click 

in the Option groups area. Note that the number of filtered items is indicated beside the button.

You can resize the **Filtered Items** dialog and its columns.



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 Task pane 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.

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 Update Against Catalog 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

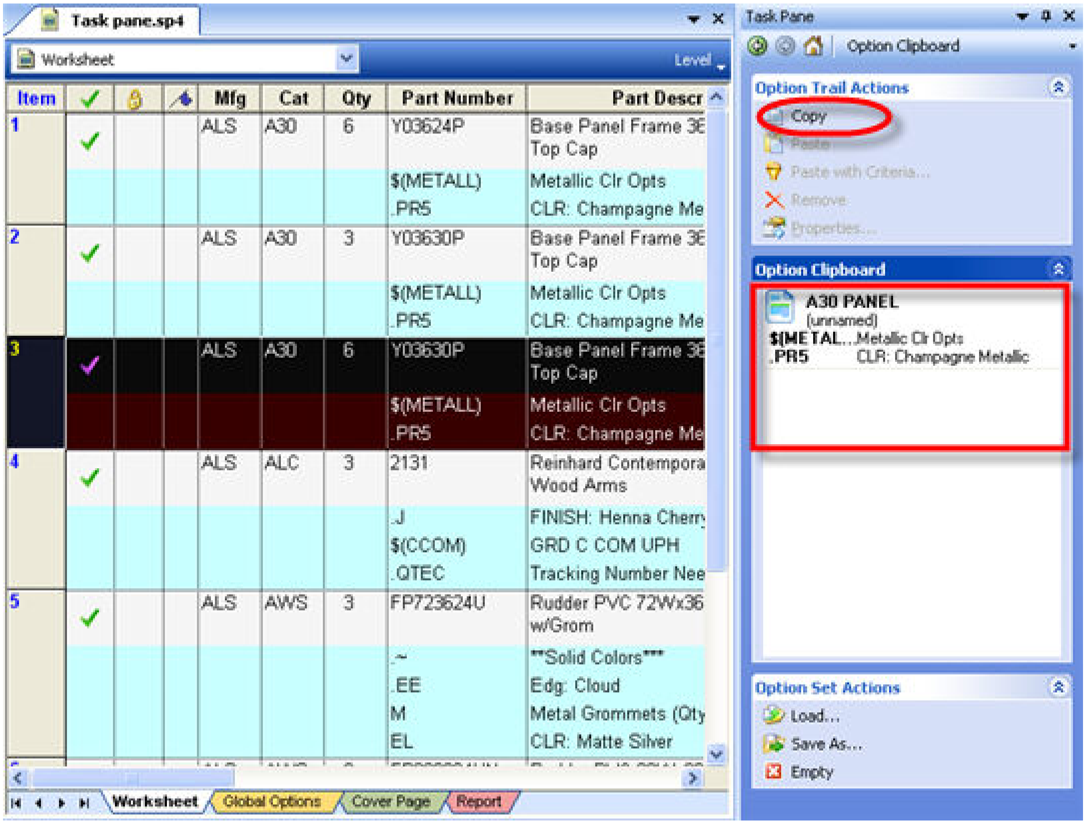
The Option Clipboard view has three sections:

- **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. Select a completely specified line or make it current.

3. Click **Copy** on the Task Pane.



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 copied to the clipboard 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 Specifications.

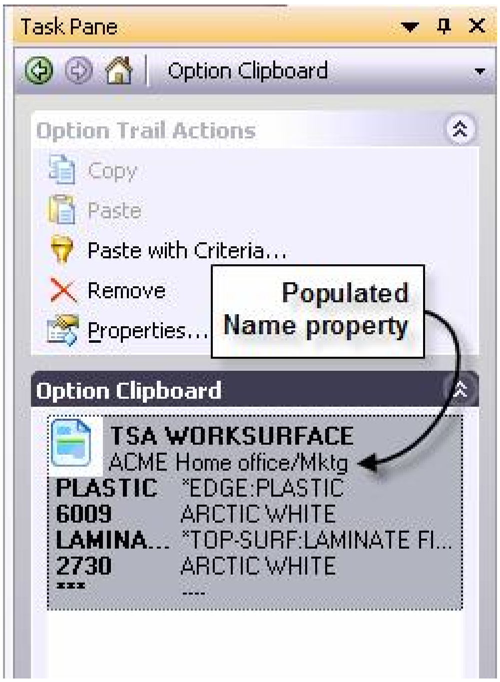
To edit an option trail's properties:

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.

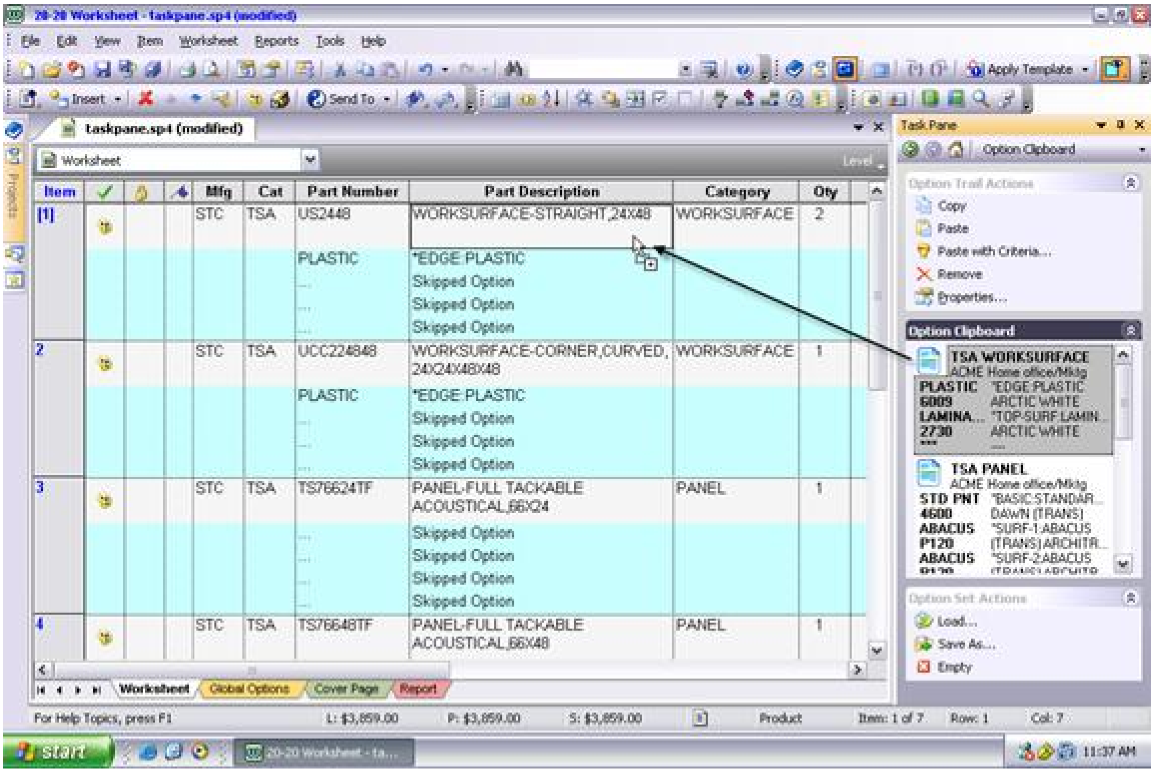


See also:

- 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.



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 update against the catalog.

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 Specify 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

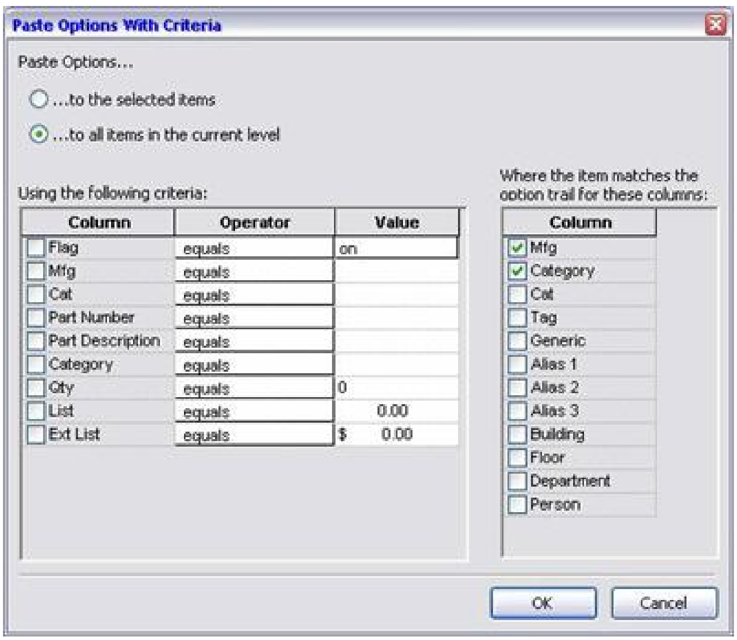
You can apply one option to items in the worksheet that share common characteristics. When using this technique you will ensure that options are assigned where desired.

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.



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 **update against the catalog**.

Apply several option trails to several items

1. Select several items in the worksheet.
2. In the Option Clipboard 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 **update against the catalog**.

Option Sets

The Option Clipboard allows you to quickly apply pre-selected options to other worksheets.

First, you must save the contents of the option clipboard to an Option Set.

Then, you can then load this option set to the clipboard and apply the options to items in your worksheet.

Save option sets

The Option Clipboard allows you to quickly apply pre-selected options to other worksheets. You can do this by saving the contents of the option clipboard 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 saved option set:

1. In a worksheet, clear the option clipboard 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.

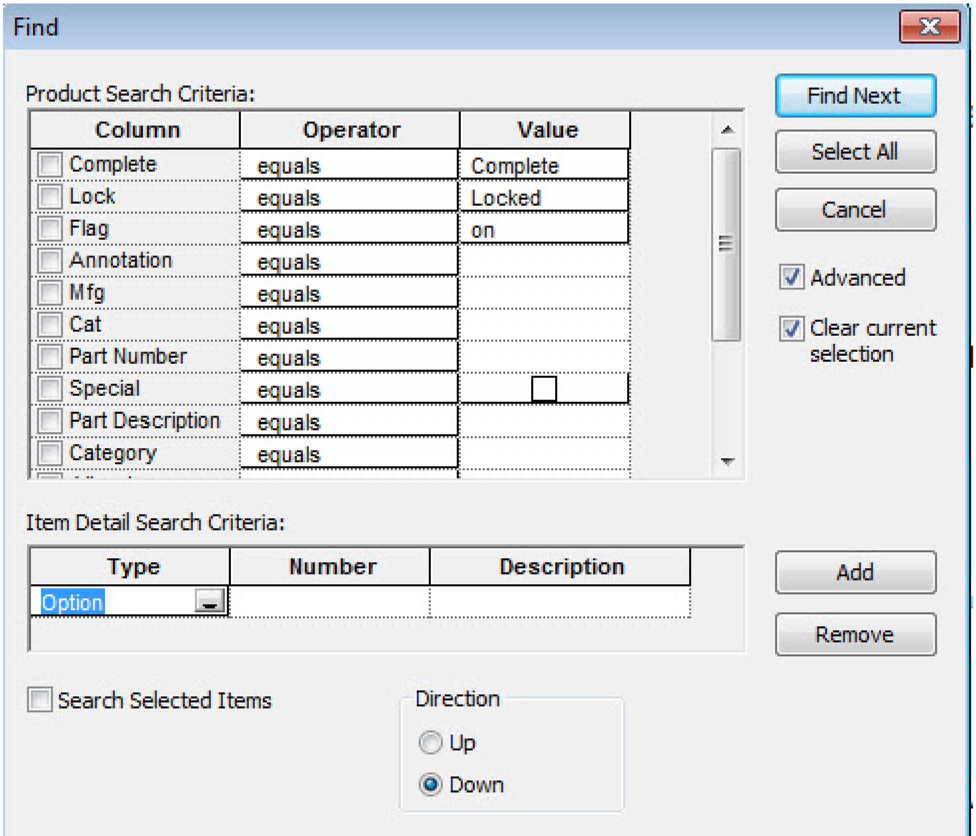
The four states are:

	Item has all the options specified.
	Item is missing option information. Clicking on this icon will open the 2020 Options dialog.
	This icon appears when options have been applied using Option Clipboard, Block Assign or Global Options but haven't been updated against the catalog for pricing. Clicking on this icon will bring up the **Update Against Catalog** dialog.
	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  on the Standard toolbar.
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.



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 discounts 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 current discount schedule, 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.

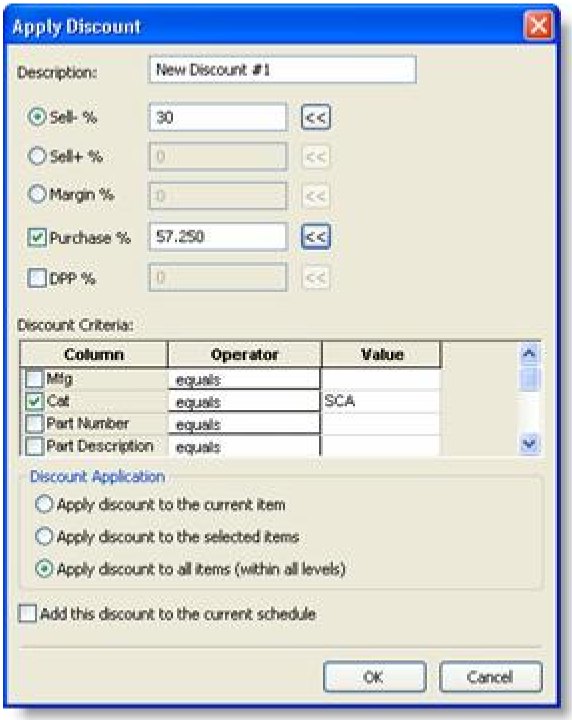
5. Discount values can be entered as a straight percentage (i.e. 35%) or as a breakdown. Click the  button to apply discounts on top of discounts (i.e. 50/10/5).

   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.



7. Click **Apply discount to all items (within all levels)**. For information about levels see [Standards](#) and [Outline levels](#).

   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]

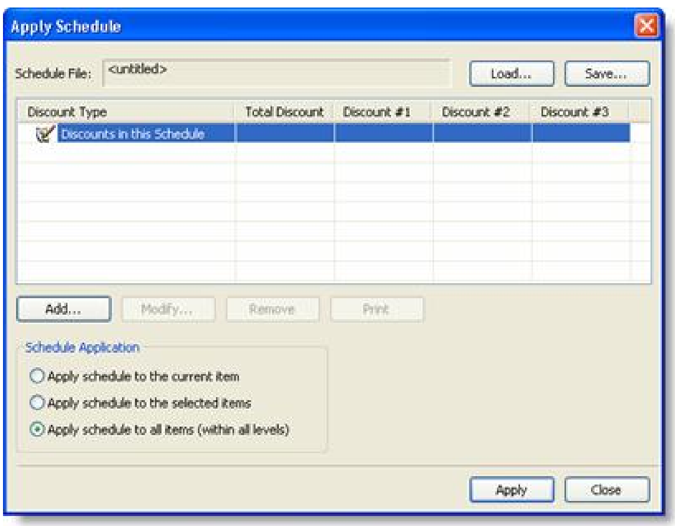
Discount schedules

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.



2. Click **Add** and a blank **Add Discount** dialog box will open. Here you can create other discounts 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.

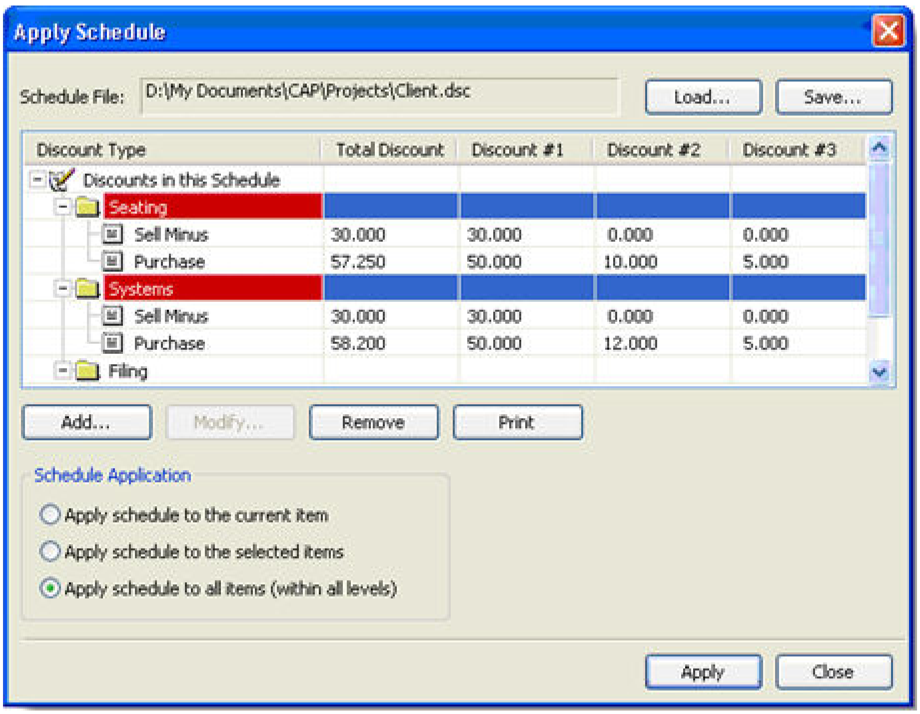
2. Type the schedule name then click **Save**.

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**).



4. Under **Schedule Application**, select whether to apply the schedule to the current item, the selected items, or all items.

5. Click **Apply**.

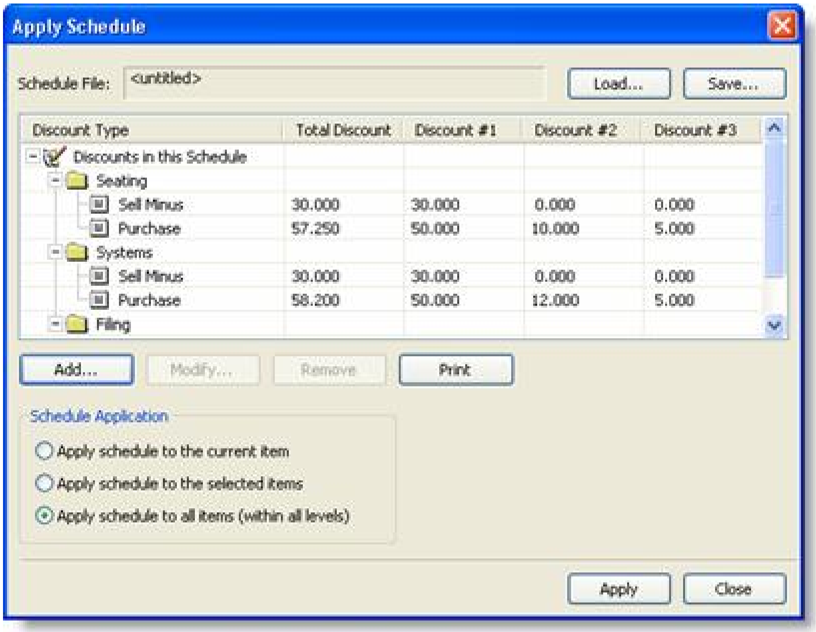
Notes: If your discounts overlap, apply the more general discount first, then go back to **Apply Schedule** and select the more specific discount. If there are discounts you commonly use, create a discount schedule with all the standard product lines you use and name it **Standard.dsc.**

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**.



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.

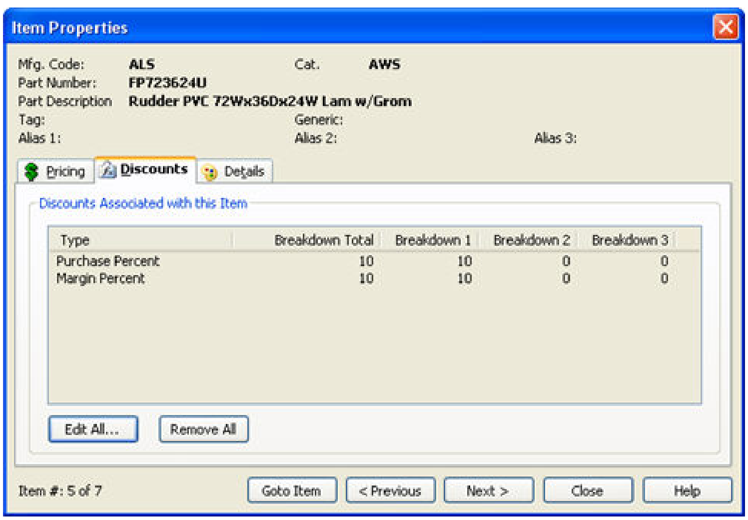
Modify discounts

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.



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 Item properties 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
- advanced - 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 Item toolbar, click Insert and select **Price Adjustment.**

See also:

- Modify or move adjustments
- Delete an item
- Show or hide rows

Fixed amount

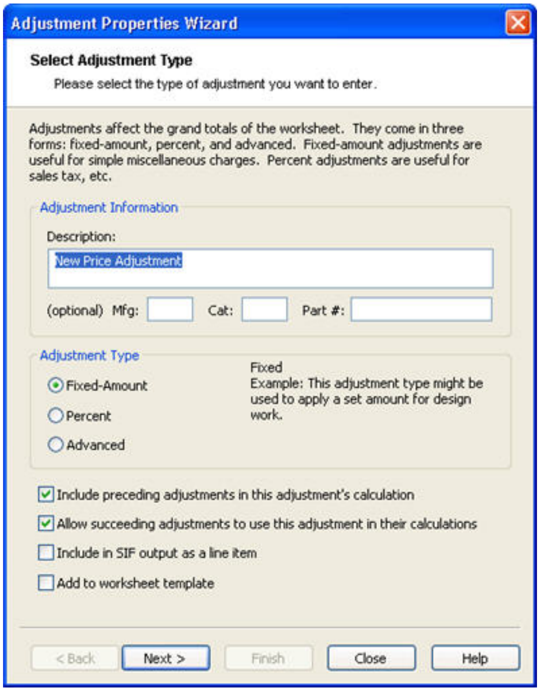
Use the **Fixed Amount** Adjustment type for fixed amount charges or reductions, such as a design fee or handling charge.

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.

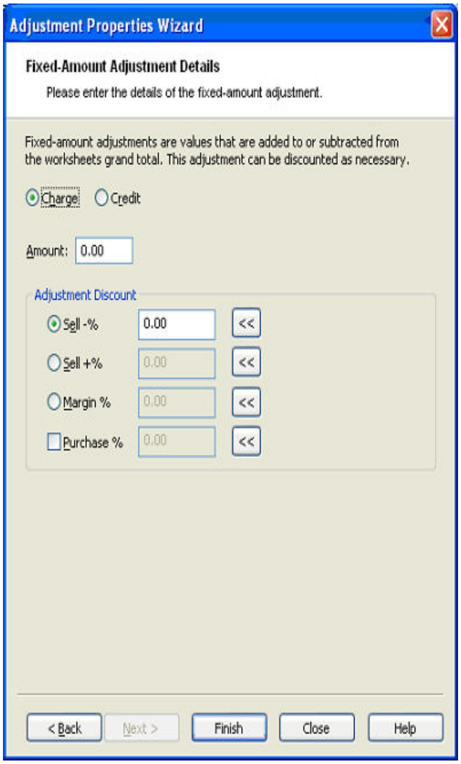
3. Leave the Adjustment Type as **Fixed Amount**.



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 worksheet template.

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.



10. Enter an amount in the **Amount** field.

11. You can also discount 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 Example - create a design fee.

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	Sell	Ext List	Ext Sell
1	Office Workdesk, 72W x 30D-2 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
	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.

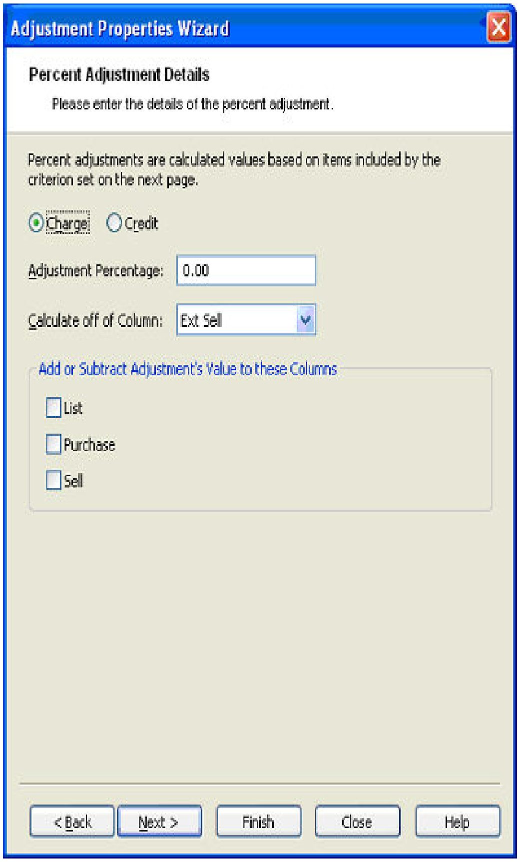
2. Under **Adjustment Type** select **Percent**.
3. If you want information to appear in the **Mfg**, **Cat** and **Part #** columns, type the text in the appropriate boxes.
4. Check **Include preceding adjustments...** if you want adjustments that appear before this one to be factored in its calculation.

   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.



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 Example - add a tax and Example - price 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	Category	Qty	List	Sell	Ext List	Ext Sell
1	Office Workdesk, 72W x 30D-2 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 Apply Discount 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.

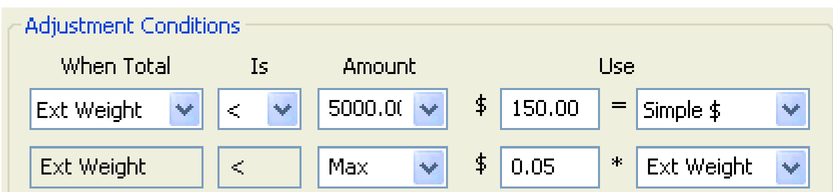
2. Under **Adjustment Type** select **Advanced**.
3. If you want information to appear in the **Mfg**, **Cat** and **Part #** columns, type the text in the appropriate boxes.
4. Check **Include preceding adjustments...** if you want adjustments that appear before this one to be factored in its calculation.
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.

    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 Example - discount for large orders and Example - shipping charge based on weight.

Example - discount for large orders

In this example, you will define the following discounts:

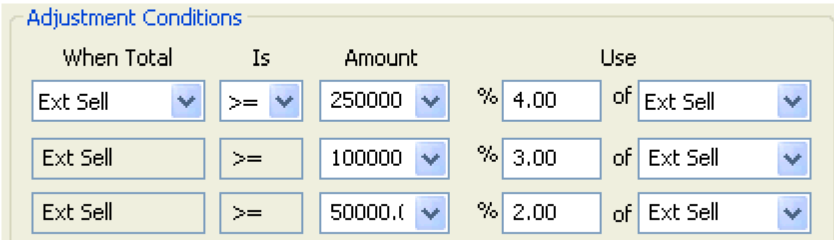
2% for orders >= 50,000 and < 100,000

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:



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		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		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

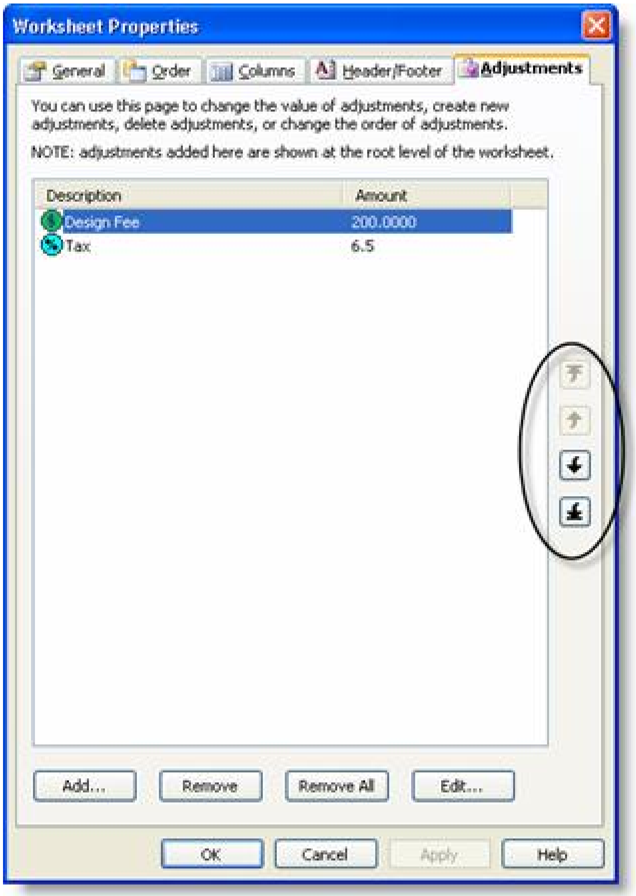
Modify or move adjustments

You can modify adjustments two ways: from the **Worksheet Properties** dialog, and directly from the worksheet.

From the **Worksheet Properties** dialog box:

1. Click the Adjustments tab.
2. In this tab, you can:

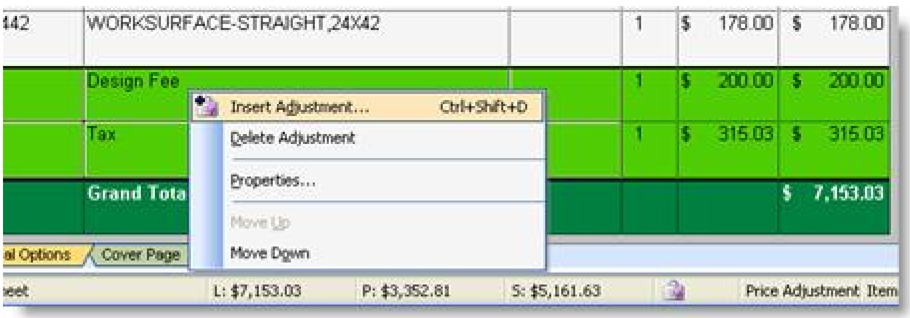
   - Click **Add** to create a new fixed or percent adjustment.
   - Select a price adjustment then click **Remove** to delete it.
   - Click **Remove All** to delete all price adjustments.
   - Select an adjustment then click **Edit** to modify it.
   - Use the arrows to change the order in which an adjustment takes effect and its order of appearance in this window.



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.



Note: You can edit an adjustment by clicking on the line.

Recalculate the Grand Total

If you delete a price adjustment from the Worksheet Properties 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:

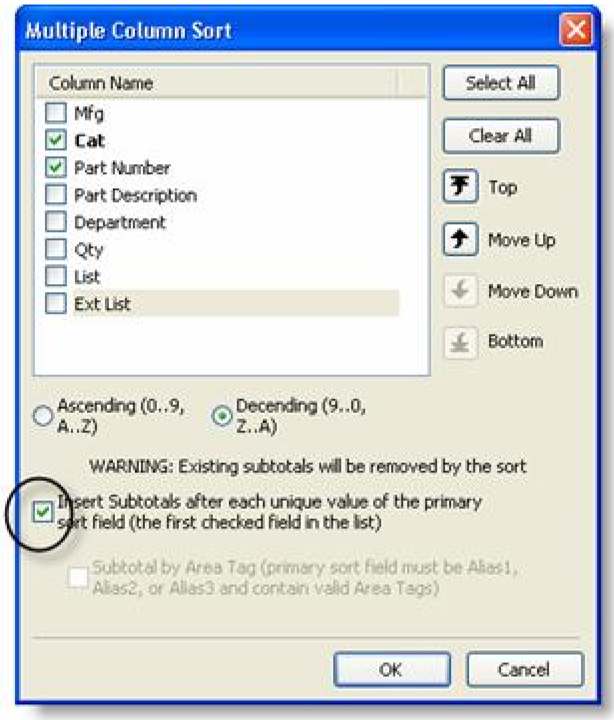
- Insert subtotal through MultiSort
- Insert subtotal manually
- Insert subtotal by a selection set
- Remove subtotals

Insert subtotal through MultiSort

The easiest way to insert subtotals is through MultiSort.

1. Click  on the **Worksheet** toolbar.
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.



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.

STC	SCA	MPTAM6524P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,24-5/16X64-11/16		1	$ 754.00	$ 754.00
STC	SCA	MPTAM6542P3	PANEL-TACK ACOUST,3 CIRCT,MED TOP CAP,42-5/16X64-11/16		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
	SCA		SCA Subtotal				$ 3,319.00
STC	SCF	RLF18422F	LATERAL FILE-2 DRAWER,FLUSH FRONT,18X42X28		1	$ 811.00	$ 811.00
	SCF		SCF Subtotal				$ 811.00
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
	SCS		SCS Subtotal				$ 1,583.00
			Grand Total				$ 5,713.00

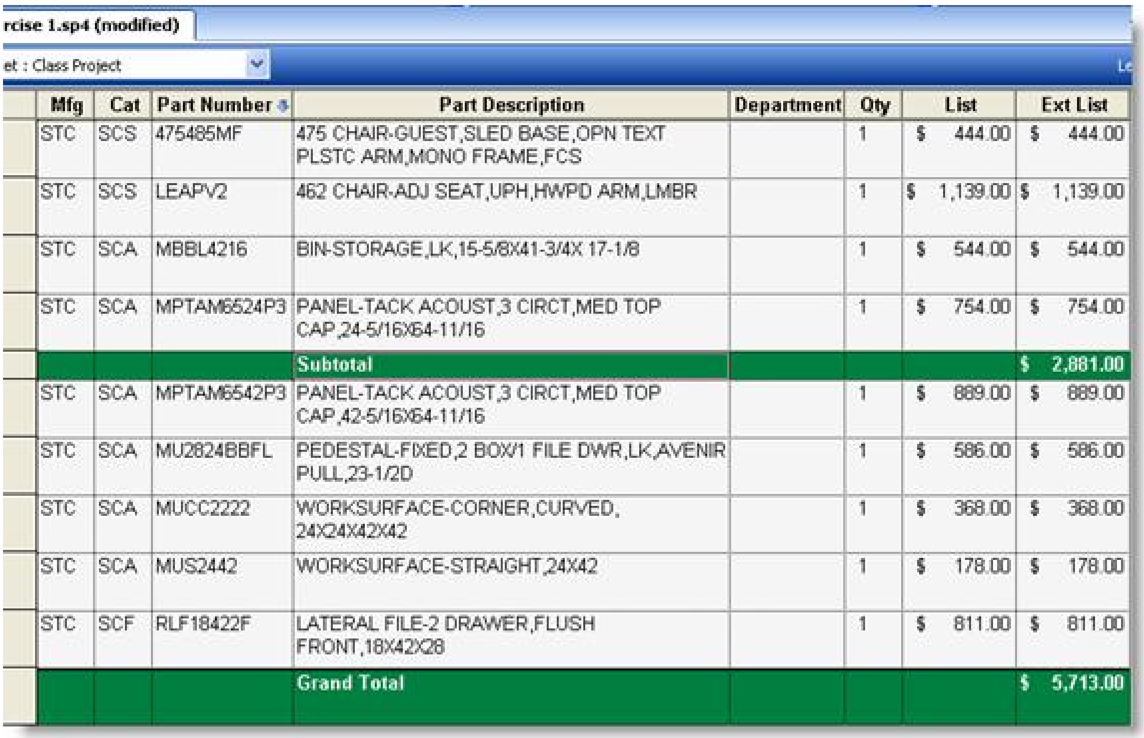
See also:

- Insert subtotal manually
- Insert subtotal by a selection set
- Remove subtotals

Insert subtotal manually

To insert a price adjustment, click Insert on the Item toolbar then 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.



Mfg	Cat	Part Number	Part Description	Department	Qty	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,42-5/16X64-11/16		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
			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 the lines.

See also:

- Insert subtotal through MultiSort
- Insert subtotal by a selection set
- Remove subtotals

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. Select the subtotal or make it current.

   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 Show or hide rows.

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 update against a manufacturer catalog

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 Standard into your custom catalog, you will see the following appear in the Projects tab:

- The custom catalog icon 

- A custom catalog CAP Standard icon 

- An individual product within that CAP Standard 

- 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 Content tab
- Specify
- a Search window

Add items into a custom catalog from a worksheet

1. Select one or several items or make a line item current in the worksheet.
2. Click 

on the Item toolbar and select **Custom Catalog Wizard**.
3. In the **Send to Custom Catalog Wizard**, select a custom catalog (ending with **.cc4**). To create a new custom catalog, see Create a custom catalog.
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, click here.

Add items into a custom catalog from the Content tab

1. In the Content tab of the Explorer pane, navigate to a specific product.
2. Right-click on a part number.
3. Select **Send To**, **Custom Catalog Wizard**.
4. In the **Send to Custom Catalog Wizard**, select a custom catalog (ending with **.cc4**). To create a new custom catalog, see Create a custom catalog.
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 2020 Options dialog, select options for the item.
2. Click **Send To**, **Custom Catalog Wizard**.
3. In the **Send to Custom Catalog Wizard**, select a custom catalog (ending with **.cc4**). To create a new custom catalog, see Create a custom catalog.
4. Click **Next**.
5. See Add in a custom catalog as a product.

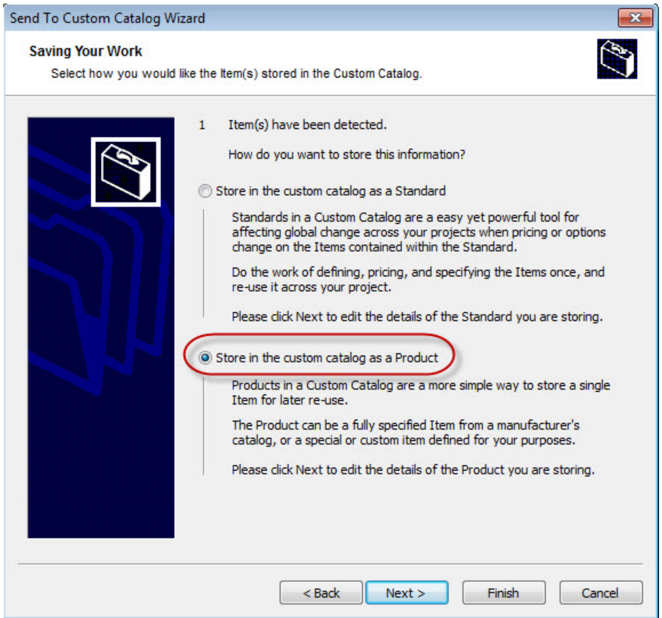
Add items into a custom catalog from Search

1. Do a Search by part number or by part description.
2. After the search is complete, click **Send To** then **Custom Catalog Wizard**.
3. In the **Send to Custom Catalog Wizard**, select a custom catalog (ending with **.cc4**). To create a new custom catalog, see Create a custom catalog.
4. Click **Next**.
5. See Add in a custom catalog as a product.

Add in a custom catalog as a product

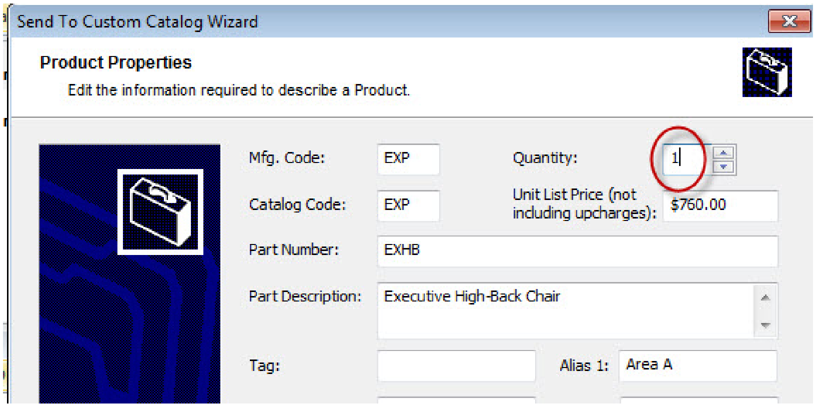
First, access the Custom Catalog Wizard from a worksheet, the Content tab, 2020 Options, or Search and then select a location within the custom catalog to store the item.

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**.



4. Click **Finish**.

5. Go to the Projects tab in Explorer and click 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 Reuse an individual part from a custom catalog.

See also:

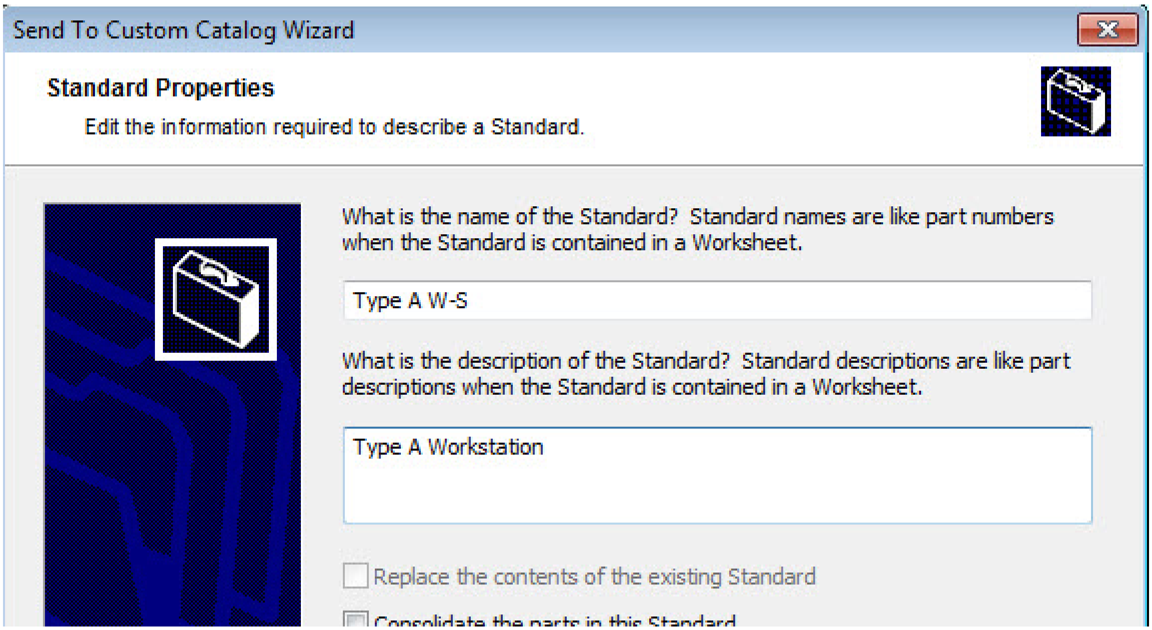
- Add in a custom catalog as a Standard

Add in a custom catalog as a Standard

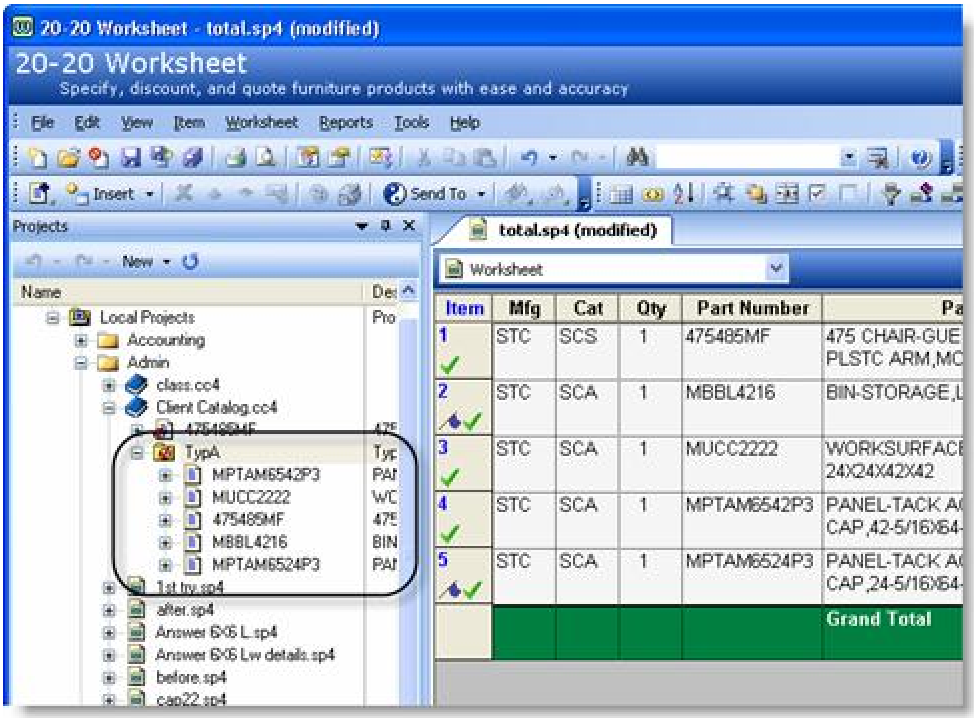
You may want to select several items in your worksheet and add those items as a Standard into your custom catalog. By adding these items as a Standard they will appear within one group.

You must first select several items, access the Custom Catalog Wizard from a worksheet 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.



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  to display the Standard in the custom catalog.



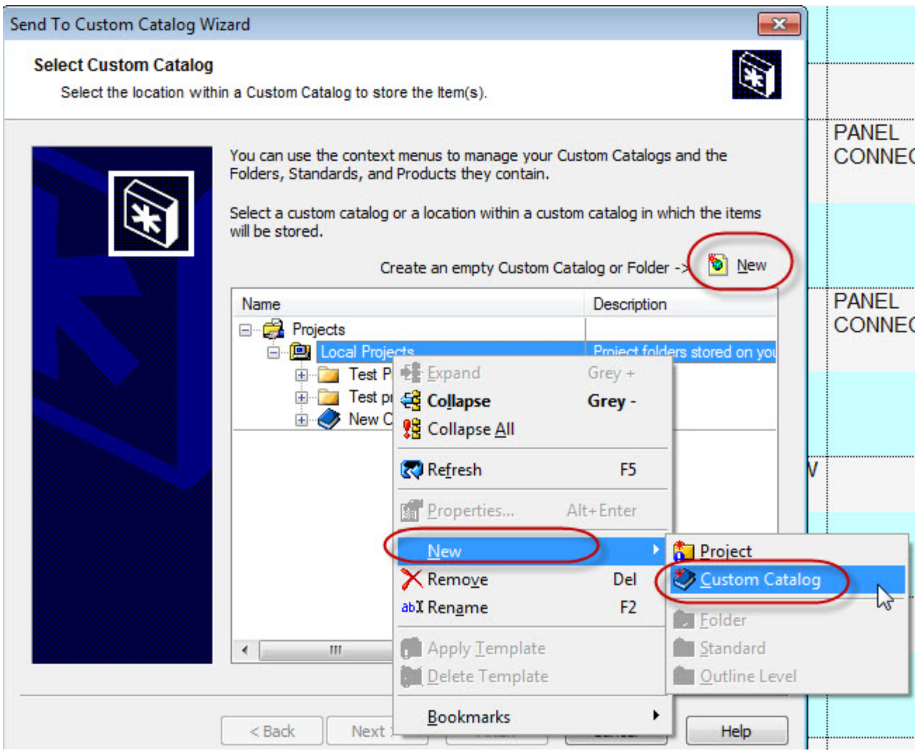
8. To add this Standard to a worksheet, see Reuse a Standard from a custom catalog.

   To add an individual part from this Standard to a worksheet, see Reuse an individual 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.



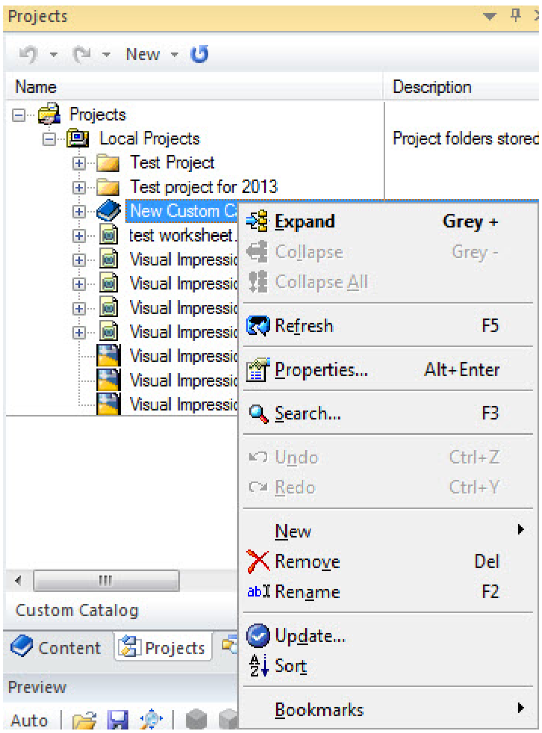
2. A **New Custom Catalog.cc4** appears. Highlight the **New Custom Catalog.cc4** and rename it.

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 Explorer pane.

Then, select the option corresponding to the modification you need to make.



Modify an item in a custom catalog

The Projects tab 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 Projects tab of Explorer, 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 Projects tab of Explorer, highlight the catalog or part you want to update.
2. Right-click and select **Update**.

   This will launch the Update Against Catalog Wizard.

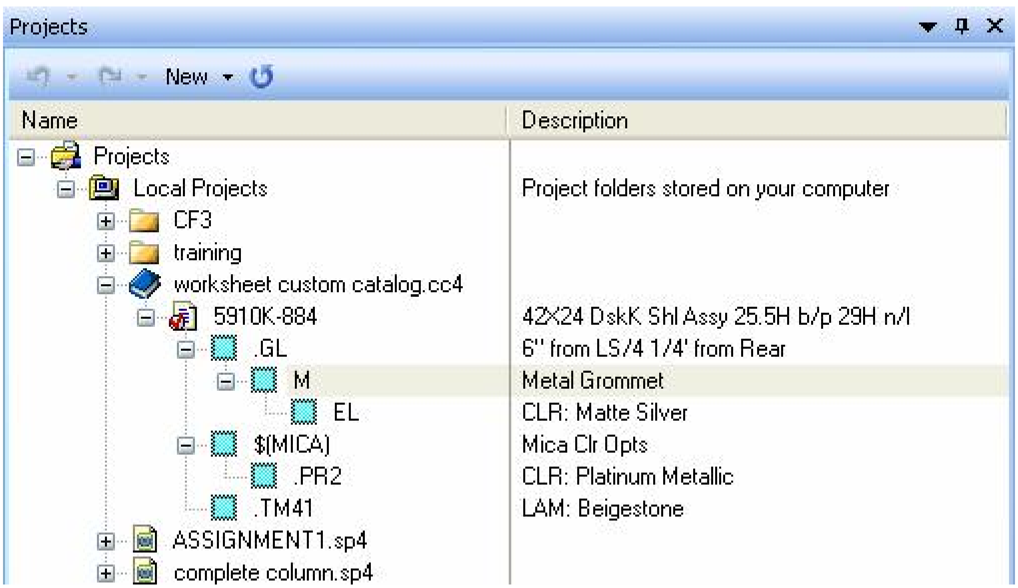
Add options to an item in a custom catalog

1. In the Projects tab of Explorer, highlight the part you want to add options to.

   If the part is within a Standard 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.



Reuse and update items from a custom catalog

Custom catalogs give you the ability to reuse items in worksheets and drawings.

You can reuse:

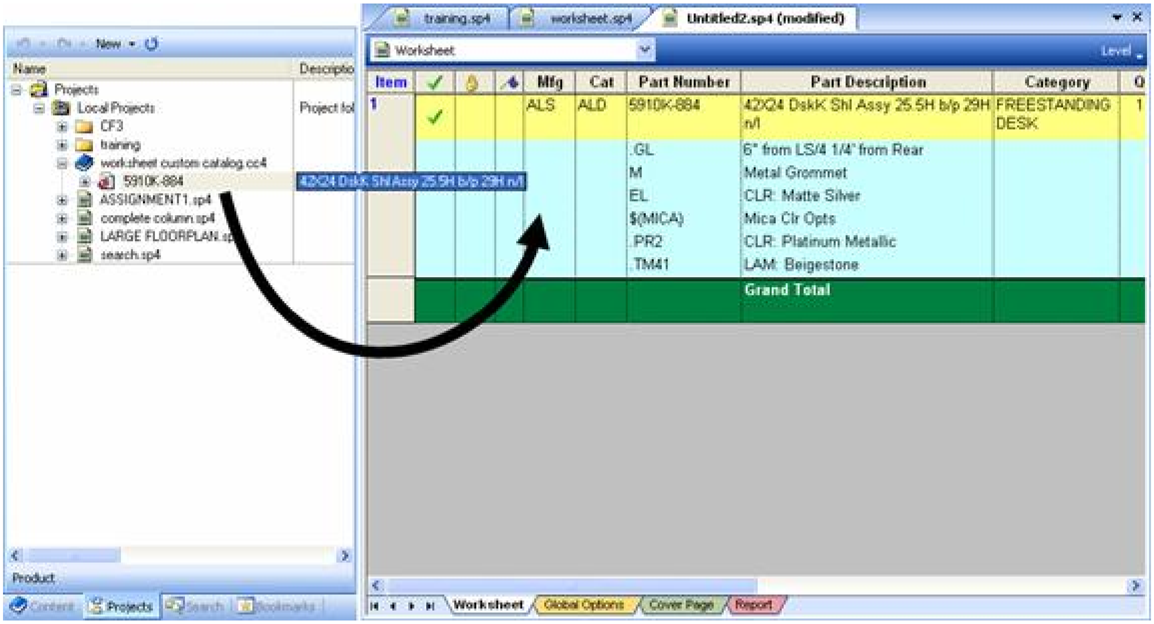
- Individual products
- Standards
- Individual products pulled from within a Standard

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 What happens when you update custom catalog items.

Reuse an individual part from a custom catalog

1. In the Projects tab of Explorer, 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**.

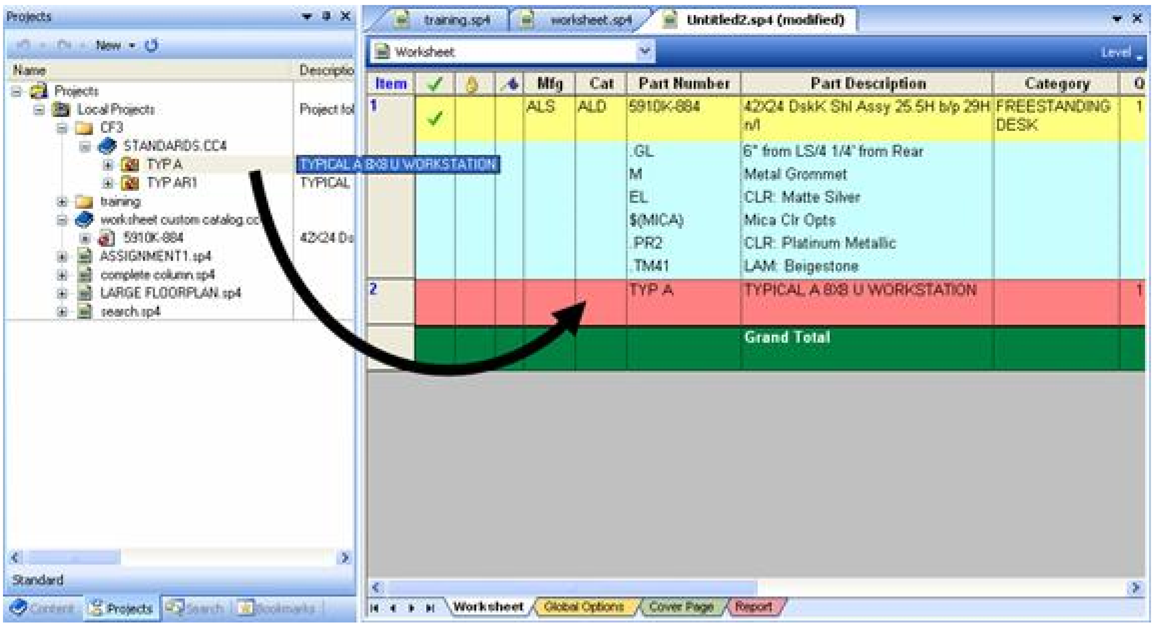
Because this item is linked to the custom catalog, when changes occur in the custom catalog they will be reflected in the worksheet.

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 Projects tab of Explorer, 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 step into the Standard, 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 update against a catalog 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.

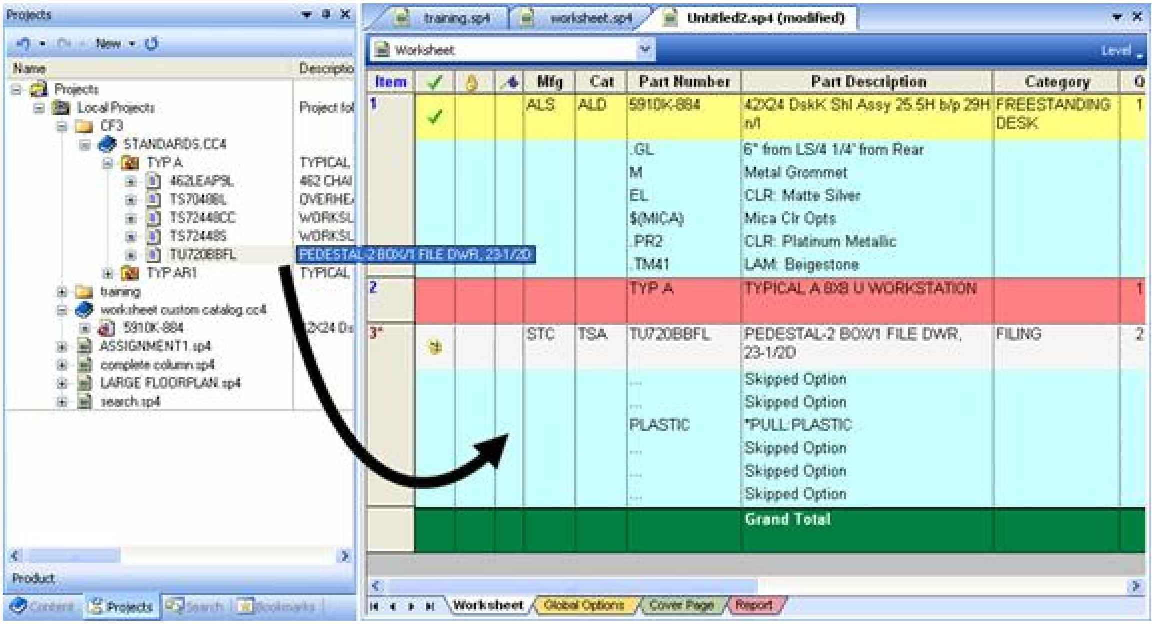
To better understand this, do the exercise below:

1. Go to the **Projects Tab** in **Explorer** and add or change the options 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 Projects tab of Explorer, 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.



Note: The individual part taken from a Standard will update against the manufacturer catalog when you perform an Update Against a Catalog.

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 update against catalog:

Individual Products	Update against →	Custom Catalog
Standards	Update against →	Custom Catalog
Individual Products pulled from a Standard	Update against →	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 current or select the items 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 update against a catalog, 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 update against the manufacturer's catalog, 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 Standard line item current.
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 Consolidate to combine them.

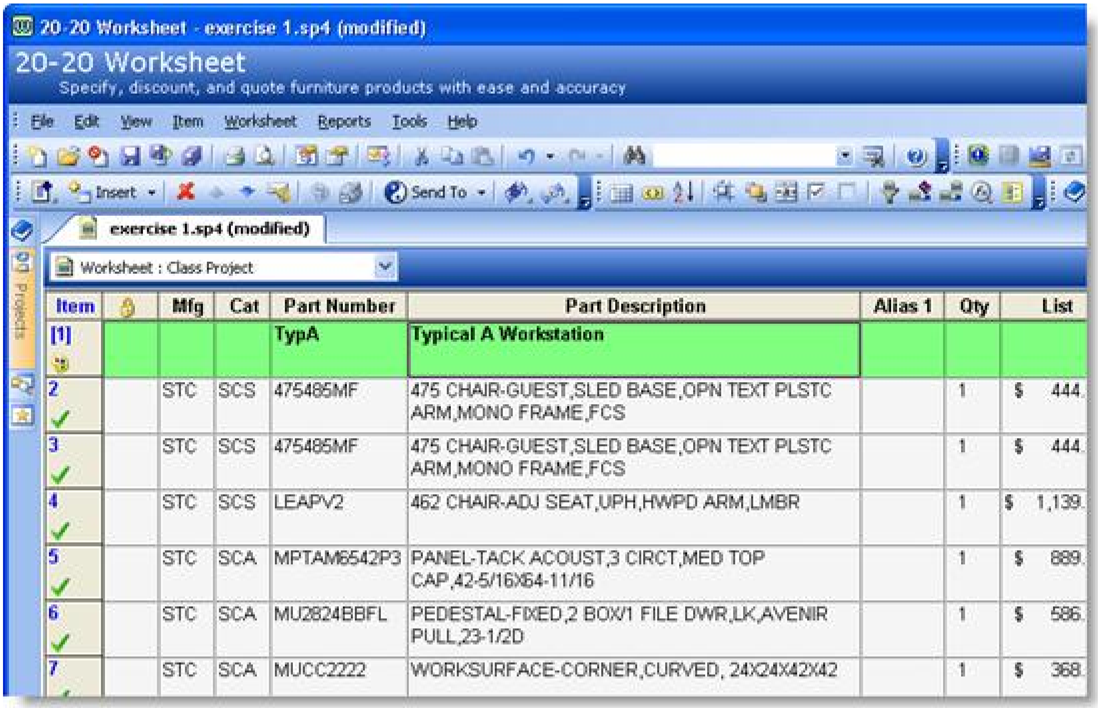
Break a Standard Link

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.

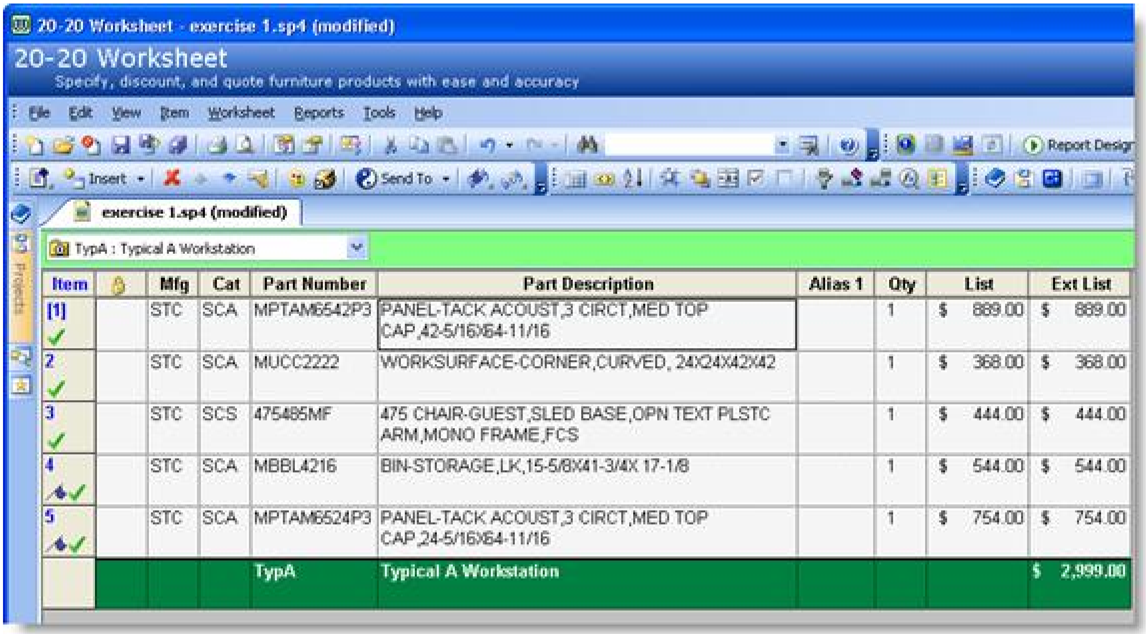
1. Make the Standard line current.
2. From the **Edit** menu and select **Break Custom Catalog Link**.

3. Click **Yes** when you see a confirmation message.

   Notice that the Standard now appears as a green outline level.



If you step into 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.



If you were now to update against a catalog, 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 Flatten the Outline level 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 Add items to a custom catalog 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 Reuse a Standard from a custom catalog for details.

This section describes how to modify and use Standards.

See also:

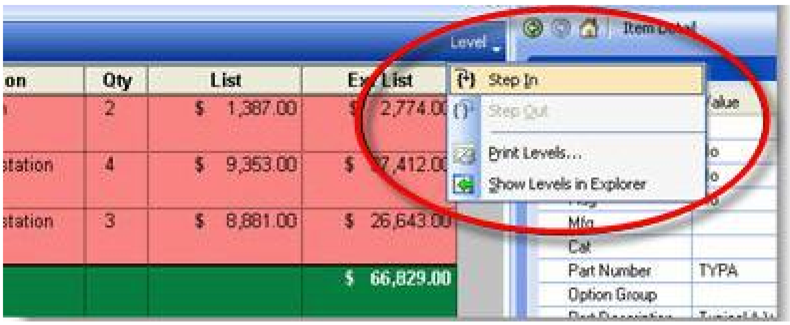
- View the contents of a Standard
- Step out of a Standard
- Redefine a Standard
- Save as single level worksheet
- Print multiple levels
- Show levels in Explorer
- Break a link on a Standard
- Outline levels
- Delete an item

View the contents of a standard

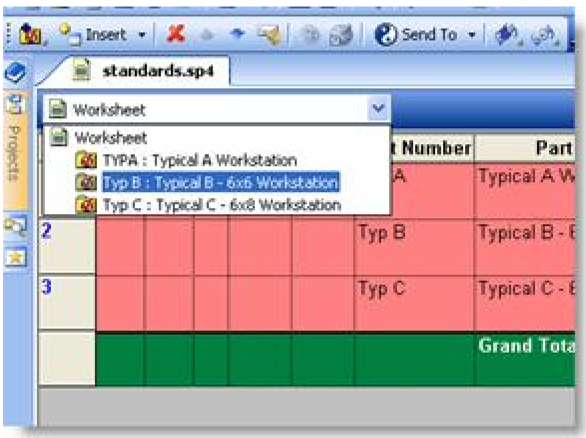
Viewing the contents of the Standard is also called **Stepping into a Level**.

To view what is in a Standard you can:

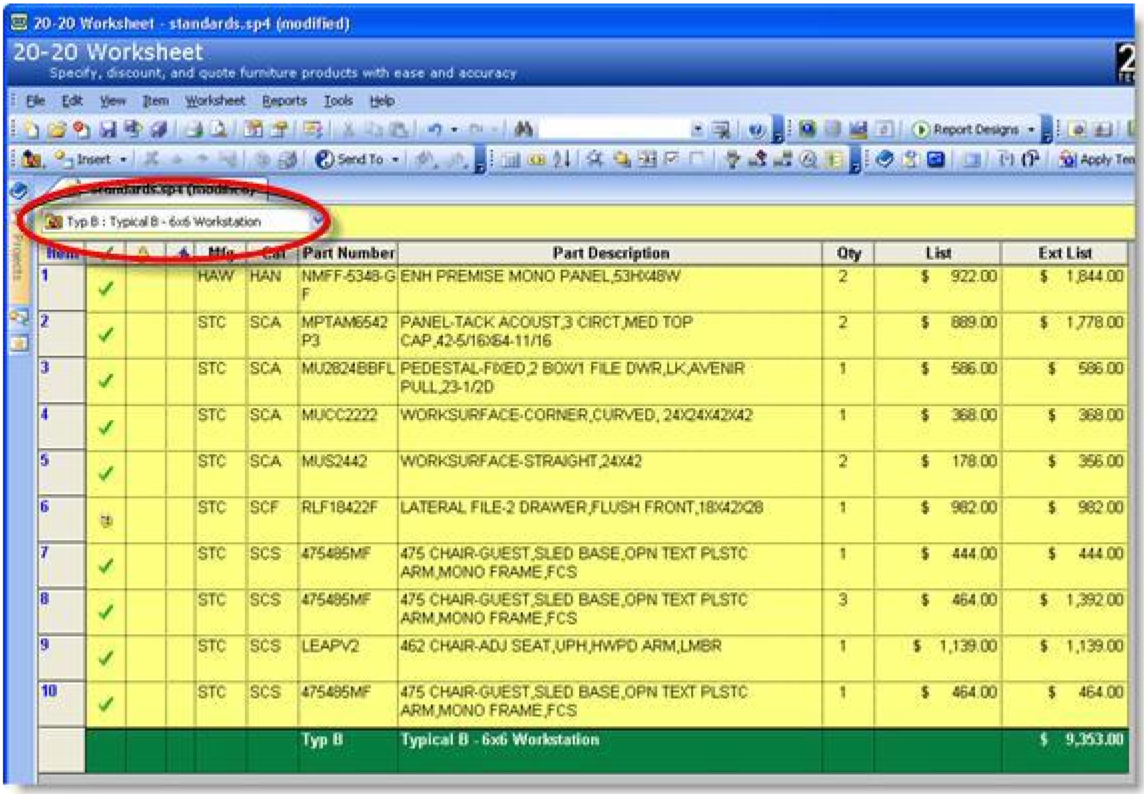
- Click the **Level** drop-down on the header then select **Step In**.



- Use the **Name** fly out. You can also jump from one Standard to another from here.



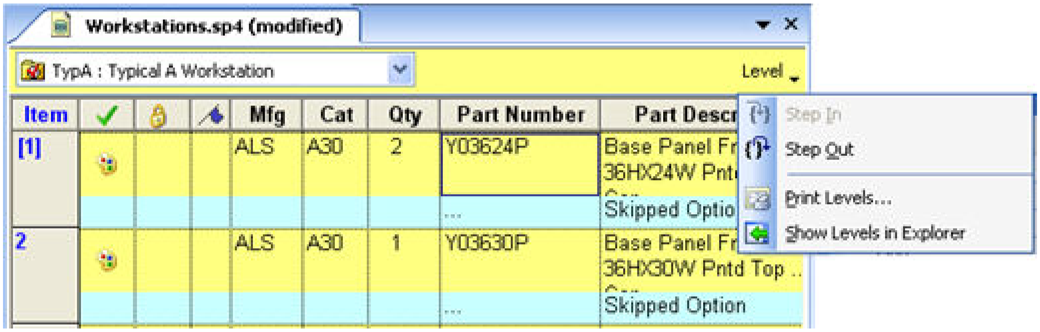
When you step into a Standard, notice that the lines are yellow, because the parts come from a Custom Catalog. Also notice the title has changed to the name of the Standard in the header (Level bar).



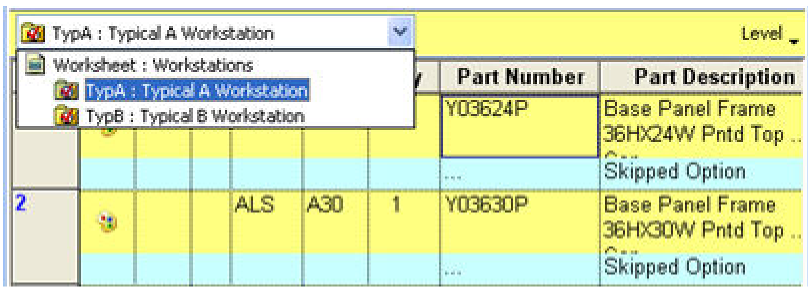
Step out of a Standard

The most common ways of stepping out of a Standard are:

- Click the **Level** drop-down on the header then select **Step Out**.



- Use the **Name** fly out. You can also jump from one Standard to another from here.



Redefine a Standard

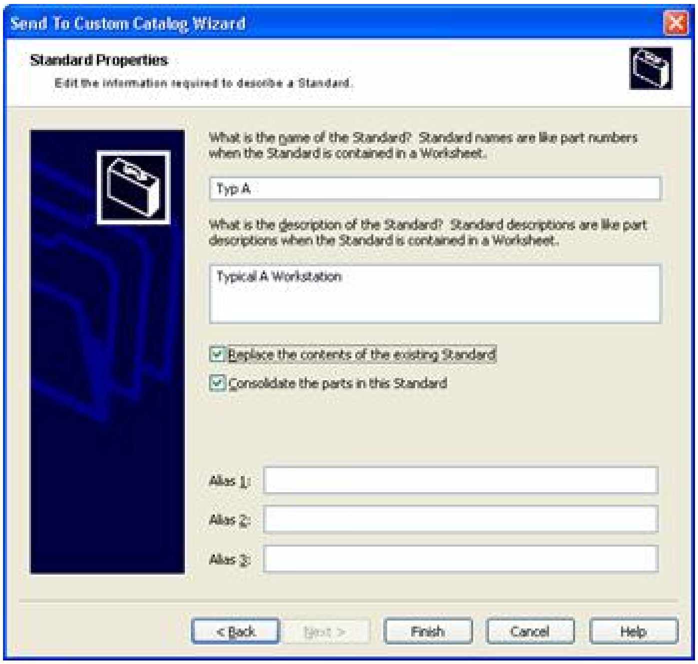
When a Standard is in a custom catalog it can be edited from Explorer, Worksheet or in CAP Designer.

Example of redefining a Standard in the worksheet:

1. Add options to the Standard in the worksheet.
2. Select all the items in the Standard.
3. Click 

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 [add or change the options]() 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.

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 flattening a standard or breaking a standard link, which breaks the link to the custom catalog.

Print multiple levels

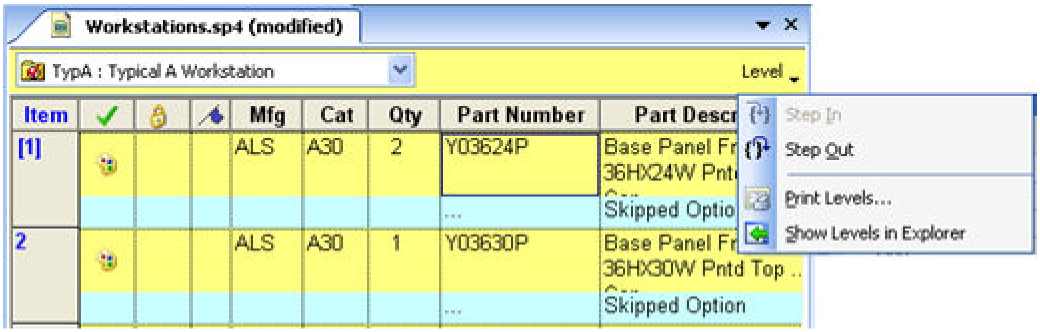
A quick way to print all the levels (Standards or Outline) in a worksheet is to use the Print Levels tool. Before you print you will need to set the default printer using the Print Setup dialog.

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 cover page and/or the report.
4. Click **Print**.

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

Show levels in Explorer

Click the **Level** dropdown on the header then select **Show Levels In Explorer**.



The Explorer bar's Projects tab 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 standards. 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 

on the Item toolbar then select **Outline level**.

2. A green line is inserted in your worksheet, representing an 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 Standards 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 Delete an item.

Note: You can also create an outline level by breaking a standard link.

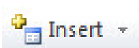
Panel configurations

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.

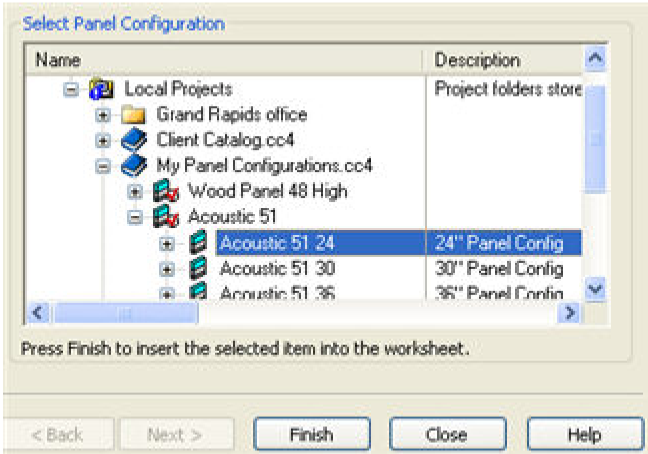
You can either:

- 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 

on the Item toolbar 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.

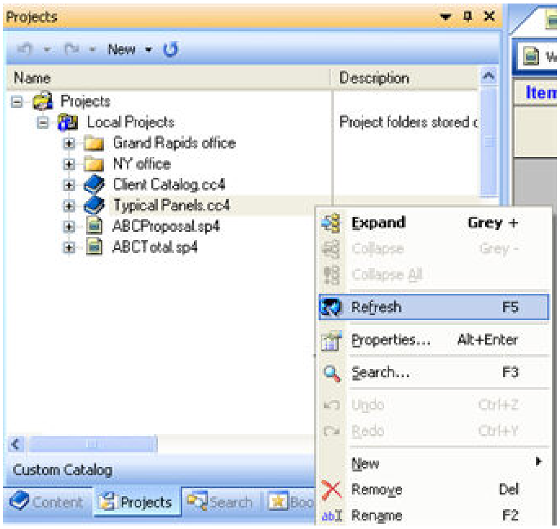


See also:

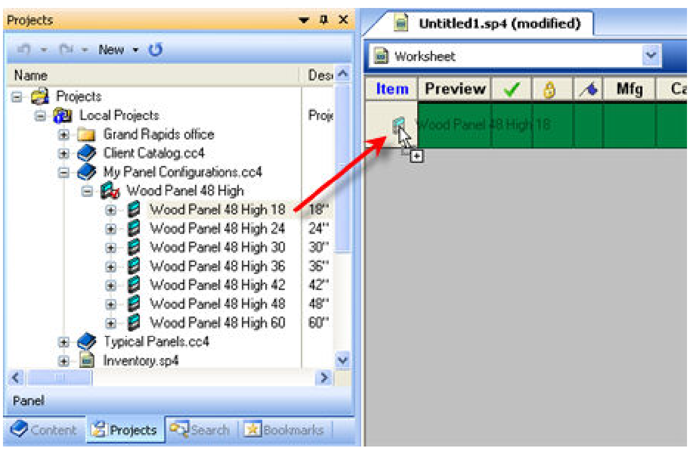
- Modify a panel configuration
- Specify options for a panel configuration

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

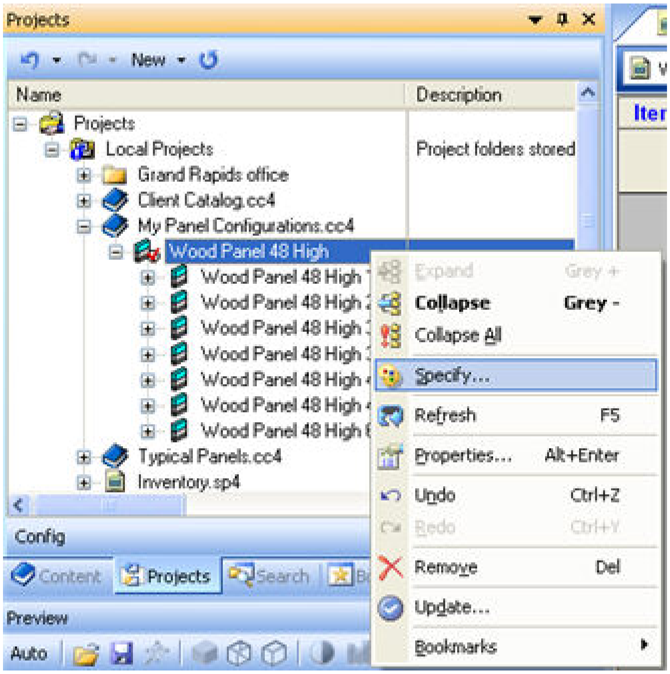
Important: A panel configuration is like a standard, with one exception: a panel configuration already inserted in a worksheet is **NOT** linked to its custom catalog.

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 Update against catalog. 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 specify options for the panel configuration 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.

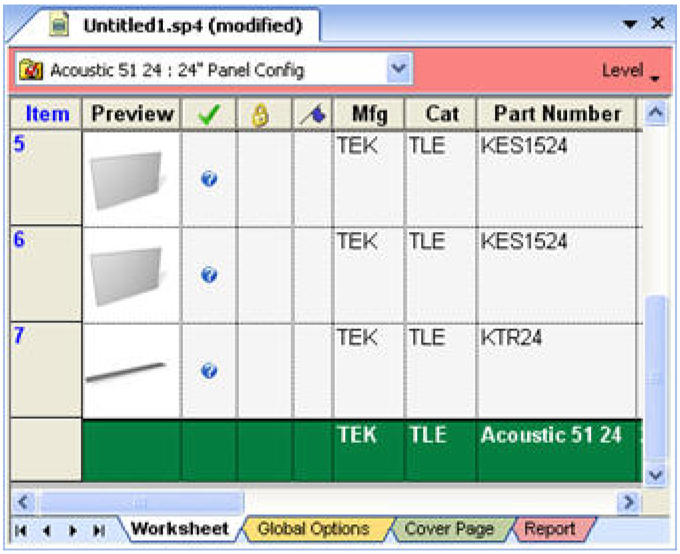


2. Make the changes in Panel Builder, save and close Panel Builder.
3. Right-click on the custom catalog (.cc4 extension) then select **Refresh**.
4. If you had previously inserted that panel configuration into the worksheet, you will need to delete that panel configuration in the worksheet then drag and drop from the Custom Catalog.

Specify options for a panel configuration

A panel configuration is represented on the worksheet as a standard. **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 modified.

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. Specify each item one by one or use Global Options.

Note: If you want to display the image in the **Preview** column, you must do an Update Preview image.

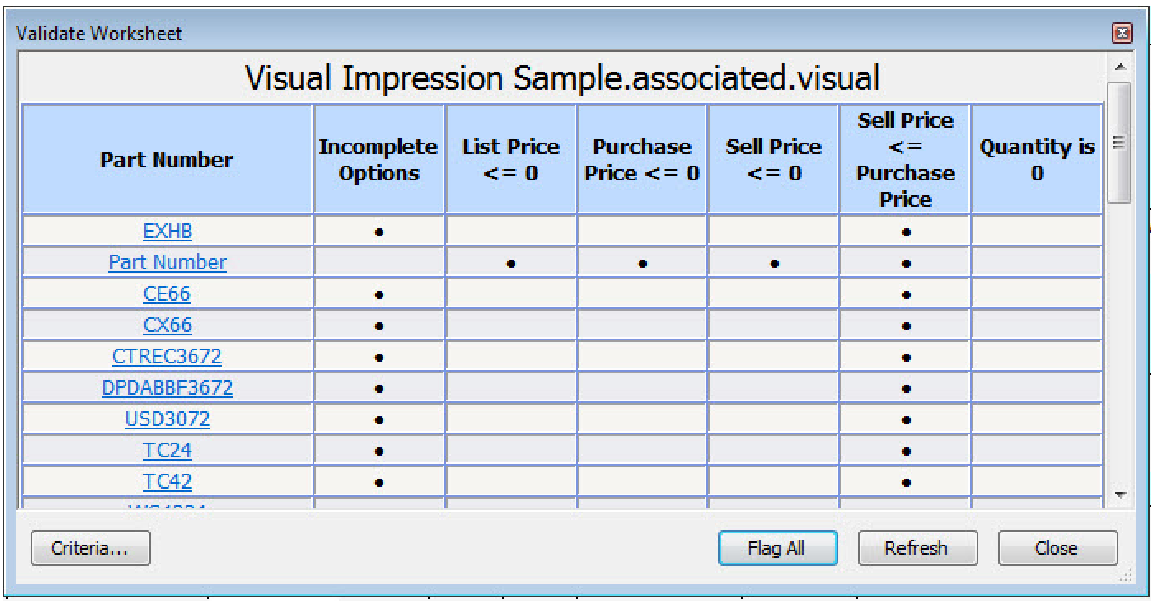
Validate a worksheet

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 Worksheet

Visual Impression Sample.associated.visual

Part Number	Incomplete Options	List Price <= 0	Purchase Price <= 0	Sell Price <= 0	Sell Price <= Purchase Price	Quantity is 0
EXHB	•				•	
Part Number		•	•	•	•	
CE66	•				•	
CX66	•				•	
CTREC3672	•				•	
DPDABBF3672	•				•	
USD3072	•				•	
TC24	•				•	
TC42	•				•	

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:

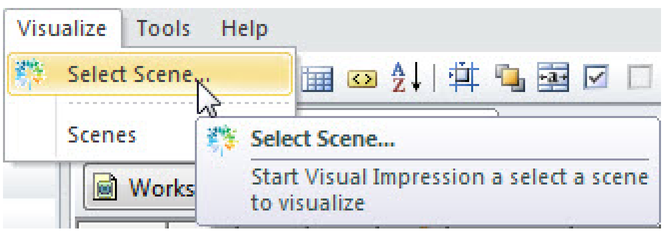
   - Click on **Flag All** to flag parts that are not valid. Without closing the dialog, make the corrections in the worksheet. Go back to the **Validate Worksheet** dialog and click **Refresh** to update the information.
   - Click on a part number to make that part number current in the worksheet. Without closing the dialog, make the corrections in the worksheet. Go back to the **Validate Worksheet** dialog and click **Refresh** to update the information.

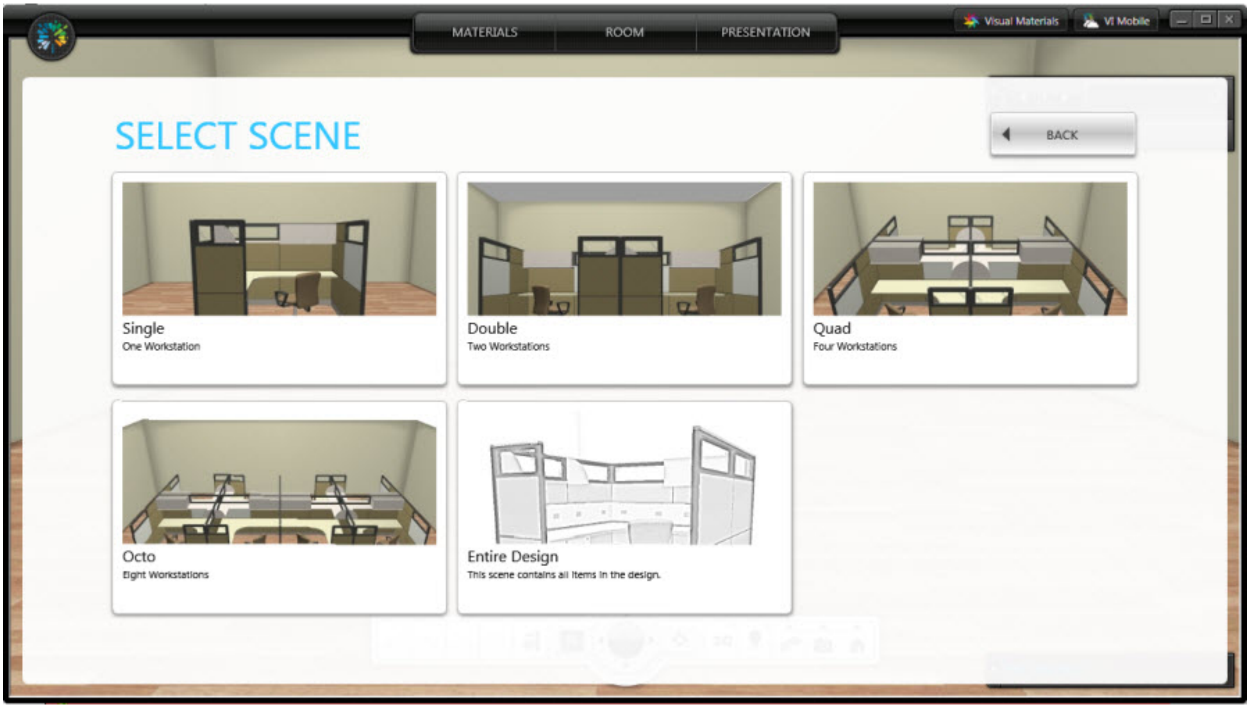
4. Click **Close** to close the dialog.

Visualize a scene or all products in Visual Impression

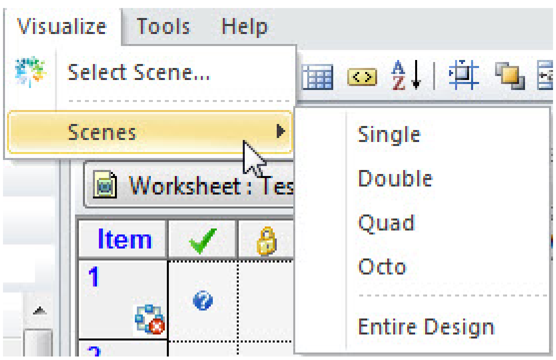
If the current worksheet was created from a CAP Designer or Giza Designer drawing, you can open Visual Impression to visually specify product and room finishes.

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 Standards. 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

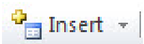
Insert worksheet links

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 `TypB.sp4`. Add a Standard in it.

Exercise - insert worksheet links:

1. Create a new blank worksheet. Save the worksheet as `ABCProposal.sp4`.
2. Click 

on the Item toolbar 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** Change worksheet links 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 Explorer, search for a chair and drag it 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 Save as single level worksheet 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 cover page and reports by selecting the appropriate contact through the Worksheet Properties General tab.

To enter contacts, from the **Tools** menu, select **Contacts**.

To:	Do this:
Add a new contact	1. Click the **Add New** button. 2. Enter the contact information on the right side of the screen. 3. Click **OK** to save your changes.
Modify a contact	1. Highlight the contact on the left side of the screen. 2. Modify the contact information on the right side of the screen. 3. Click **OK** to save your changes.
Delete a contact	1. Highlight the contact on the left side of the screen. 2. Click **Remove**. 3. Click **OK** to save your changes.

Set a contact as the **Prepared by** contact in Worksheet Properties.	1. Highlight the contact on the left side of the screen. 2. Click **Set Default**. 3. Click **OK** to save your changes.
Import contacts from a comma-separated (.csv) file or an XML file	4. Click Import File. 5. In the Open dialog, select the file to import then click Open.
Export contacts to a comma-separated (.csv) file	6. Click Export File. 7. In the Save dialog, type in the name of the file then click Save.

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 Contacts 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 Standard toolbar.
2. In **Worksheet Properties**, click **General** on the left.
3. 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.

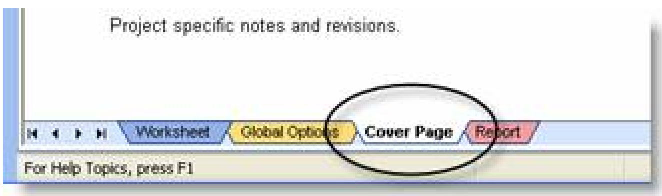
Cover Page includes an editor and WYSIWYG (What You See is What You Get) preview screen. In Cover Page you can include: company logos, imported graphics, freehand drawing elements and worksheet data that is dynamically updated from a worksheet, such as pricing and customer information from Worksheet 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

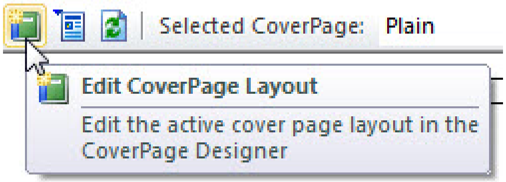
Edit an existing cover page

1. Click the **Cover Page** tab in the Worksheet area.



2. Beside **Selected CoverPage**, select **Plain**.

3. Click the **Edit CoverPage Layout** icon.



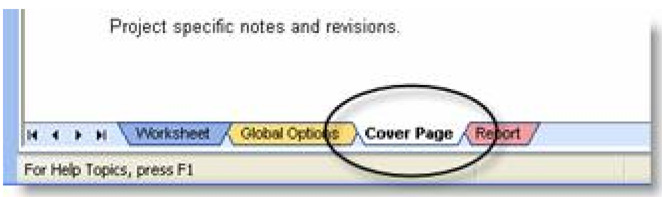
This launches the 2020 CoverPage Designer for the default cover page titled **Plain**.

4. See the 2020 CoverPage Designer online help for information on using this program.

5. After making changes in 2020 CoverPage Designer, click  on the Cover Page toolbar to view your changes.

Manage cover page layouts

1. Click the **Cover Page** tab in the Worksheet area.



2. Click the **Manage CoverPage Layouts** icon on the CoverPage toolbar.

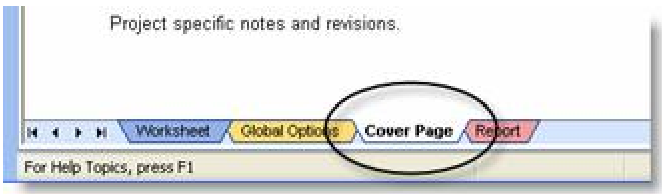
3. In the **Manage Cover Page Layouts** dialog box you can do any of the following:

To:	Do this:
Create a new cover page layout	Click **New** to create a blank cover page layout
Create a new cover page layout based on an existing one	See Create a new cover page layout.
Edit a cover page layout	Select the cover page layout then click **Edit**. 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 **Rename**.
Delete a cover page layout	Select the cover page layout then click **Delete**.
Apply a cover page layout to the current layout	Select the cover page layout then click **Apply.**

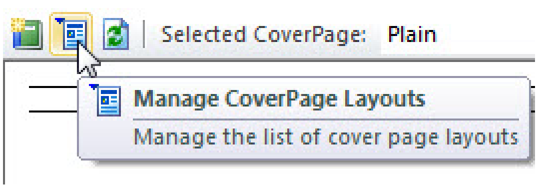
Set a cover page layout as default	Select the cover page layout then click **Set Default.** Notice that the selected layout is now in **bold.**
Reset the default cover page layout	Click **Clear Default**.

Create a new cover page layout

1. Click the **Cover Page** tab in the Worksheet area.

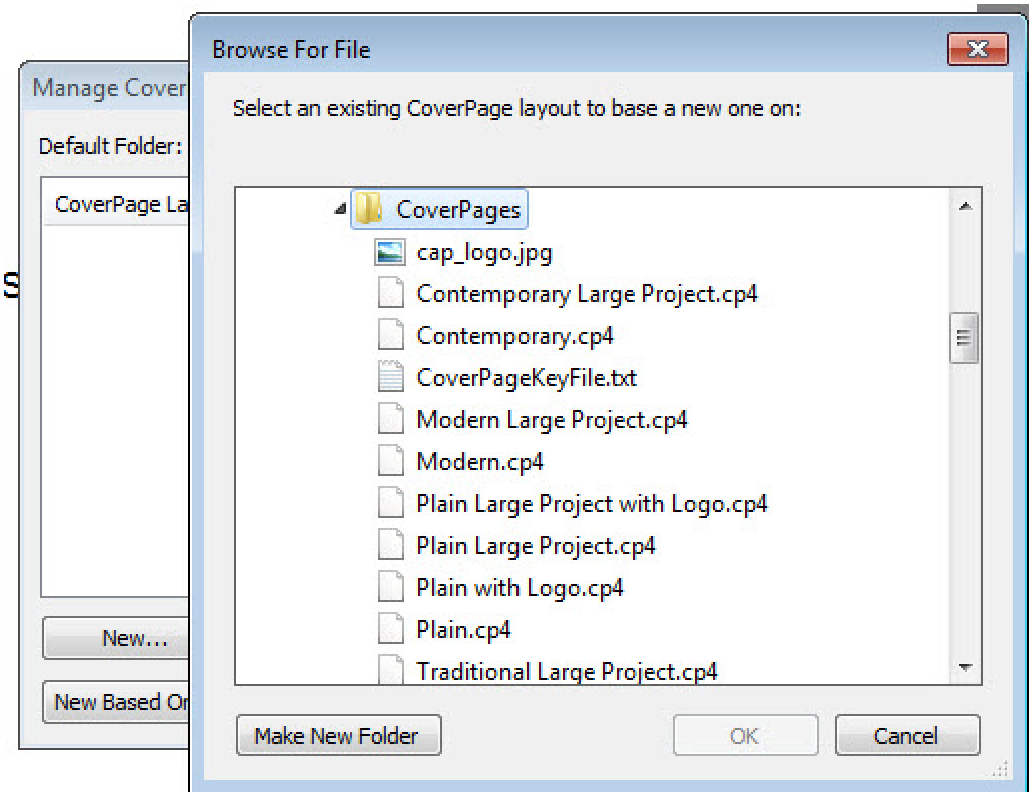


2. Click the **Manage CoverPage Layouts** icon on the CoverPage toolbar.



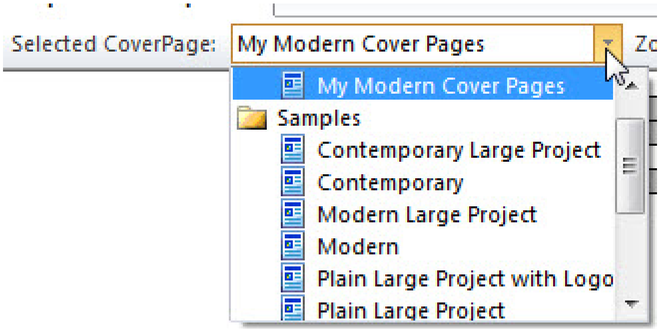
3. In the **Manage Cover Page Layouts** dialog box, click **New Based on** to create a cover page layout based on an existing one.
4. In the Browse for File dialog, click the + sign beside the CoverPages folder to expand it.

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**.

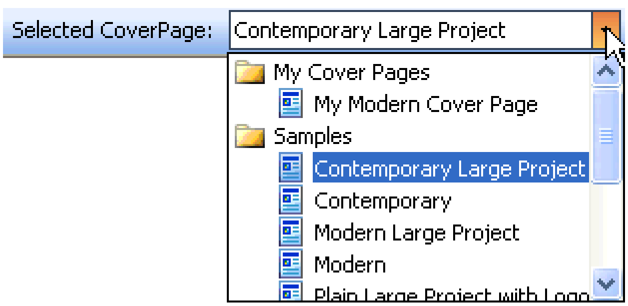


Apply a cover page layout

To apply a standard or user cover page layout to the current cover page:

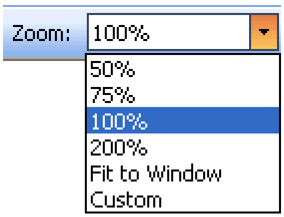
1. From the menu, select **Reports**, then **Apply CoverPage** Layout.
2. Select the standard or user cover page layout from the list.

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 Worksheet area, 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 Cover Page 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

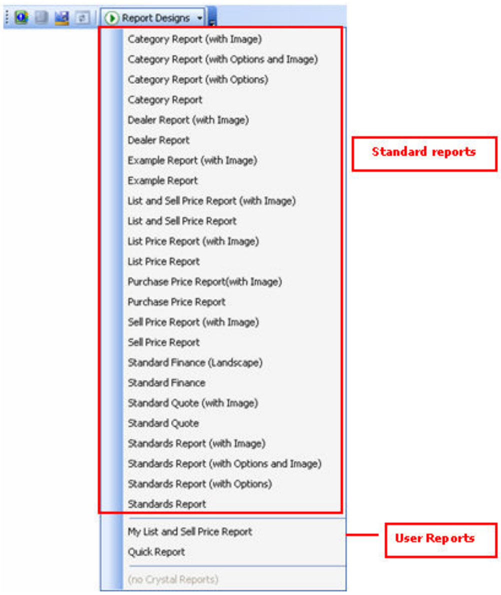
View a report

Click the **Report** tab at bottom of the worksheet area.

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 Report Toolbar.



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 on the Report Toolbar.

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.

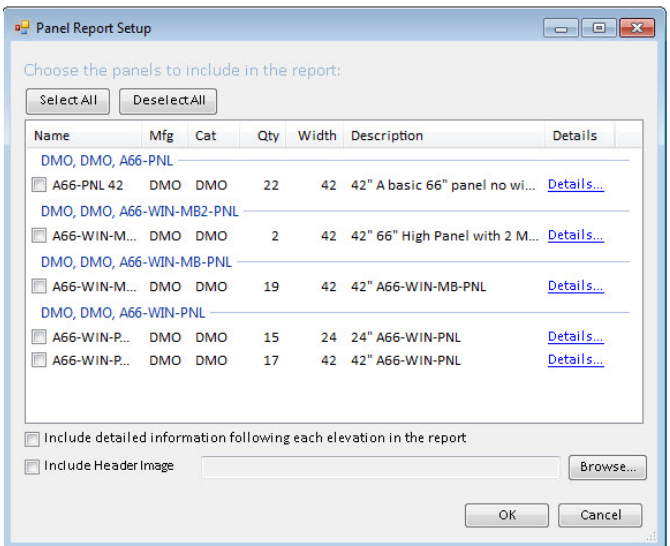
1. Click on the Reports toolbar.
2. In the **Manage Report Design** dialog:

To:	Do this:
Create a new blank report	1. Click **New**. 2. Enter a name for the report then click **OK**. 2020 Report Designer launches with the new report opened. See the Report Designer help to edit the report.
Create a new report based on an existing one	1. Click New Based On. 2. The Browse for File dialog opens. Select the report in the Standard Reports directory. If you would like to browse to the User Reports they can be found under: *My Documents\CAP\UserReports.* 3. Enter a name for the report then click OK. 2020 Report Designer launches with the new report opened. See the Report Designer help to edit the report.
Edit a report	Select the report then click **Edit**. 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 **Rename**.
Delete a report	Select the report then click **Delete**.

Apply a report design to the current one.	Select the report then click **Apply.**
Set a report as default	Select the report then click **Set Default.** Notice that the selected report is now in **bold.**
Reset the default report	Click **Clear Default**.

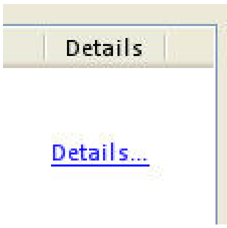
Create a Panel Builder Report

To generate a report on panel configurations showing Panel Builder elevations and finishes, click **Reports**, **Panel Builder Reports**...



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.



- 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 **Details** you want, check **Include detail information following**... and **Include Header Image**, as you wish, then click **OK**.

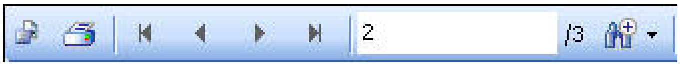
Report Designer

You can modify standard reports and also create and edit user reports in the 2020 Report Designer program.

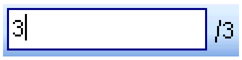
1. Click on the Reports toolbar.
2. See the Report Designer help for information on using this program.
3. After making changes to a report design, click on the **Reports** toolbar to regenerate the report.

View report pages

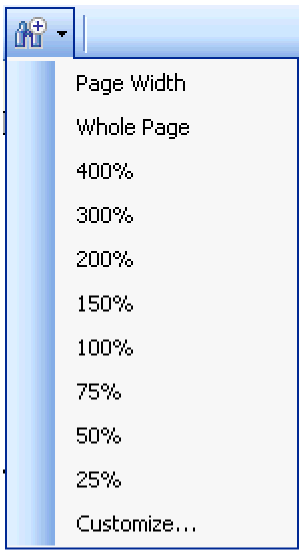
From the Report tab toolbar, use the arrow buttons to view pages in the report:



Or, type the page number in the **Go To Page** box then press Enter:



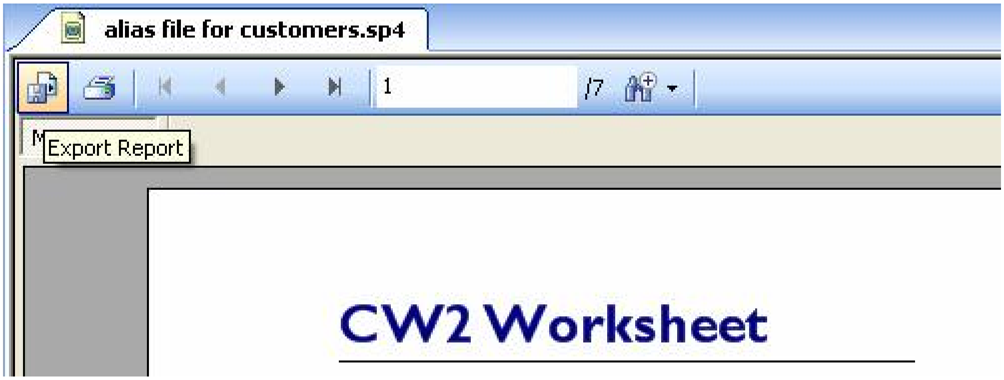
To zoom in or out, click the **Zoom** icon and select the zoom factor.



Export a report to PDF

Once you created a report, you can export it to a .pdf file.

1. From the Report tab, click the **Export Report** button on the toolbar.



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 Report tab 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.

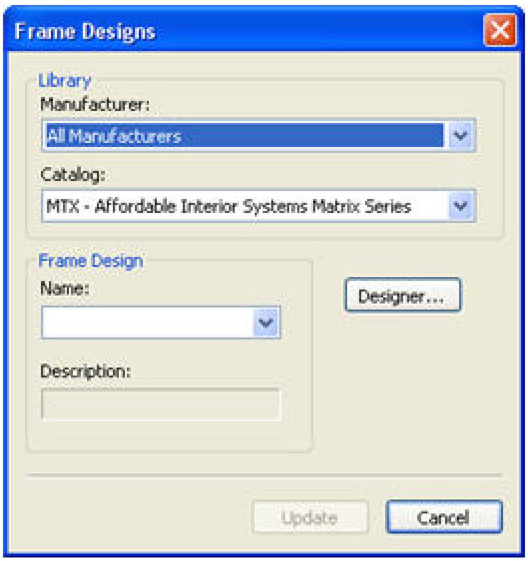
See:

- 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 Worksheet toolbar.

2. Select the **Manufacturer** and **Catalog** that you wish to use. The dialogs/choices will vary with each manufacturer.



3. Click **Designer**.

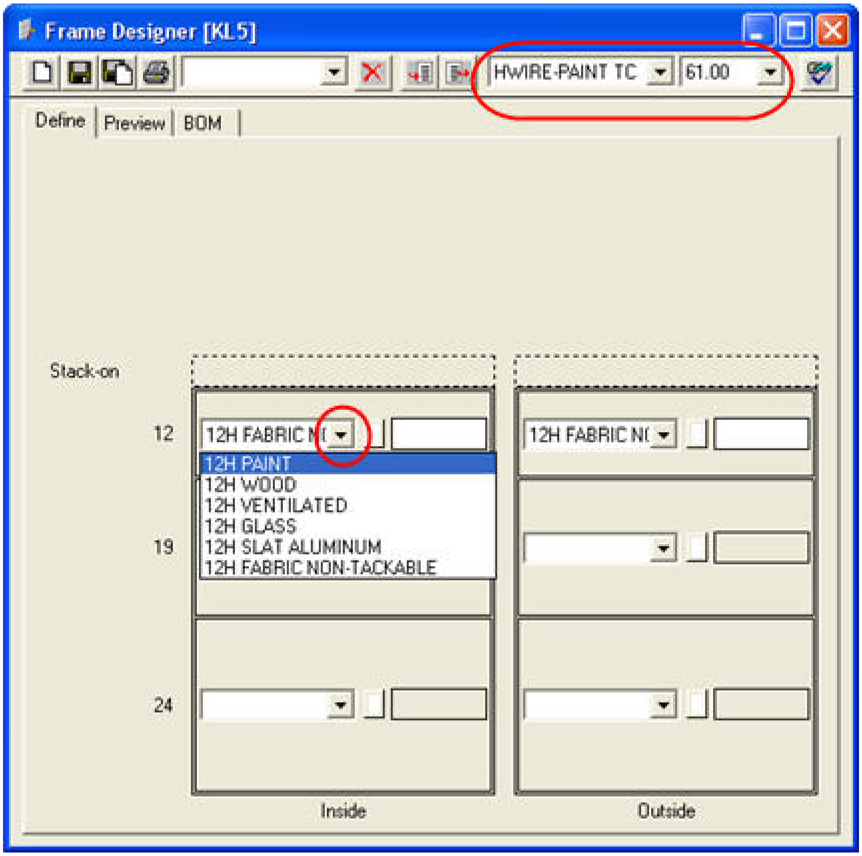
See also:

- 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

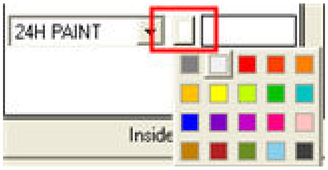
Create a frame design

1. Click  on the Worksheet toolbar.
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”.

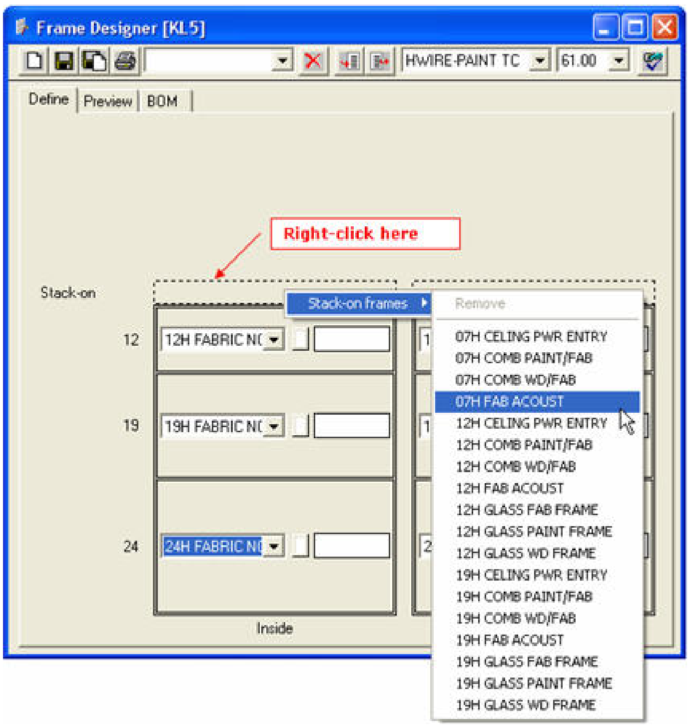


5. Use the Tile drop down menus to pick the tiles required.
6. Click the **Color** button to the right of each tile dropdown to specify color for tiles and topcaps.



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**.

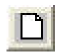
15. Click the **Update** button to create all the frame design sizes for that configuration.
16. Click **OK** when you see the confirmation message.

    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 export it to a design set then import the design set into another worksheet.

See also:

- [Modify a frame design]
- [Print a frame design]
- [Add frame designs to a worksheet]
- [Frame Designer preferences]

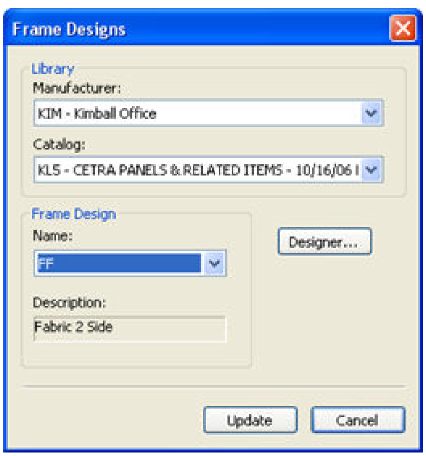
Note: You can also create a new frame design by clicking  in the **Frame Designer** dialog. You will have to enter the design name and description right away. Follow the same steps as above.

Modify a frame design

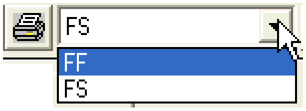
Note: For instructions on creating a frame design, see [Create a frame design].

1. [Access the Frame Designer].

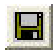
   To access the frame design right away, select the name in the **Frame Designs** dialog



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 Print a frame design.

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.

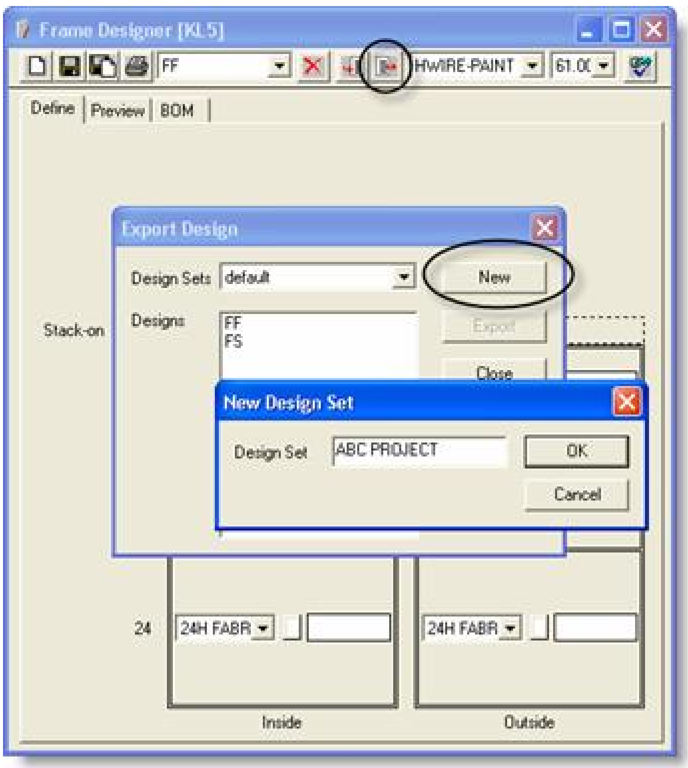
See also:

- 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 creating or modifying frame designs, click .
2. In the **Export Design** dialog, click **New**.
3. Type a name for the **Design Set**.



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 Standards.

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**.

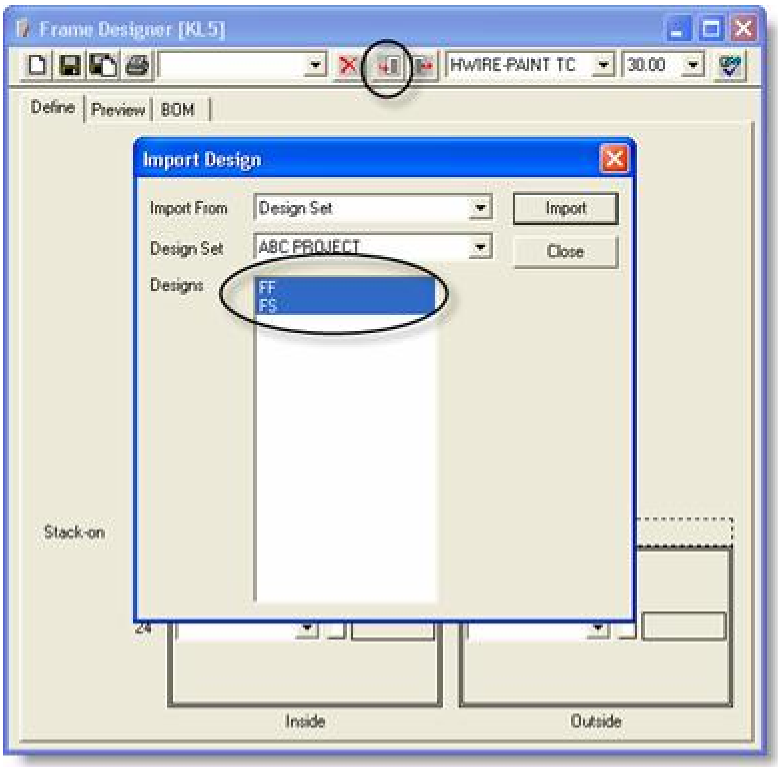
   You can also select **Giza Project** or **Manufacturer Design file**.

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.



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

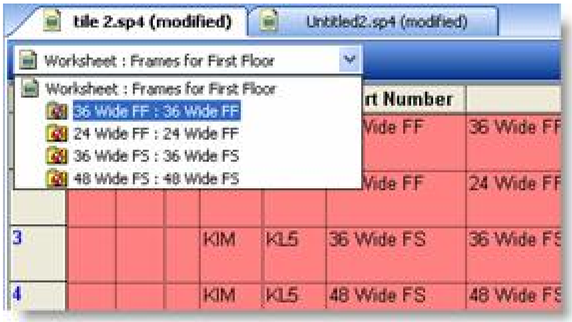
Add frame designs to a worksheet

After creating the frame designs you will need to add them to the current worksheet.

1. Click 

 on the Item toolbar 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 Standards 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.



A frame design is a Standard and will open the same way.

Note: Option set values are stored in the **Alias3** column.

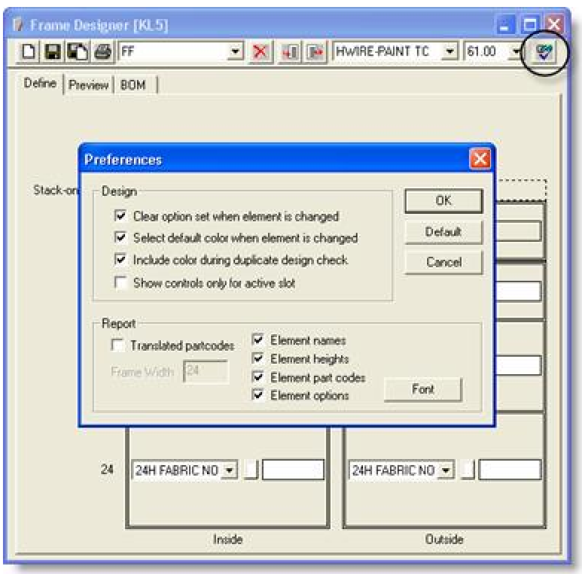
For more on working with Standards, see Standards.

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 **Option set** field is cleared when you select another tile on the **Define** 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 **Define** 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 **Define** 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.

- File menu
- Edit menu
- View menu
- Item menu
- Worksheet menu
- Reports menu
- Visualize menu
- Tools menu
- Help menu

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 project notes	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	Header / Footer
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 (**Yes** or **No**) or to **Cancel** the **Exit** 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
Copy	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	Select items Select flagged, locked, complete or incomplete items

		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	Status Bar
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	Split an item
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	Shortcut	Description	Help topic
Consolidate		Merges like items in the 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	Frame Designer
Global Options		Access Global Options commands. These are accessible only if you are in the Global Options tab.	Global Options
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	Create a Panel Builder Report
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	Contacts
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 **Customize** 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	What's new

		download software and manufacturer catalog updates.	
User Guide		Open a PDF version of the online help	View or print the User Guide
Release Notes		To read notes about the current release	
www.2020technologies.com		View the 2020 Technologies website	
Diagnostics		Troubleshoot and repair damaged files	Diagnostics
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