ProjectSpec Help
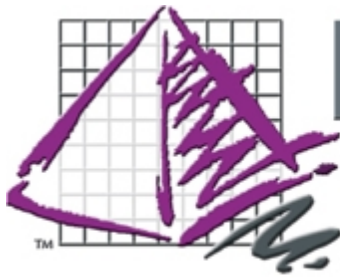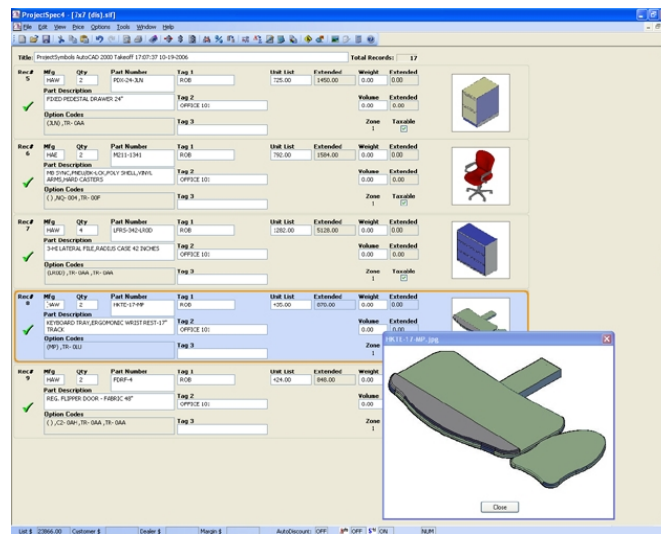
Welcome To ProjectSymbols

Welcome to the on-line help for the ProjectSpec program by ProjectMatrix. Click here to begin.

ProjectMatrix has the industry's most experienced staff when it comes to developing tools. As the old cliché goes, ProjectMatrix software is written "By Industry People, for Industry People". Some of our staff spent as long as 10 years working in contract furniture dealerships, and others worked with contract furniture manufacturers to give us a unique perspective on what features are needed, and how these features need to improve work flow and productivity.

We don't have to "guess" at what features a user might need, we've been there, and we know what tools are important as well as how they can affect the dealers and users. We also rely heavily on user input from training sessions and technical support questions. When someone says, "Wouldn't it be neat if...", we listen closely to develop tools that save time and money for every user. In short, ProjectMatrix tools are developed from an "insider's" point of view.

Getting Started

Welcome to the on-line help for ProjectSpec.

What can you expect from the ProjectSpec program?
ProjectSpec is the industry's most powerful and easiest to use full-featured product specification package. ProjectSpec allows users to create a parts list with options (fabrics, trims, finishes, etc.) and prices. This specification can be used for bids and proposals to customers, invoices and purchase orders, and is in a format that can be used to send orders electronically to a manufacturer. In addition, ProjectSpec files can be imported into some accounting and asset management systems. The program combines a user-friendly interface with production driven features. These features make it available to virtually all levels of the dealer and design professional staff - design, sales, order processing, development and management. The ProjectSpec site license allows for the program to be on any computer at a single location, including portables for the professional on the go! Inventory control, client standards programs, and "what if" tools are available for the sales management team. ProjectSpec works for everyone at an affordable price. Some of the key features available to you with this software are as follows:

- Price entire .SIF files.
- Accurate product counts.
- Create and manage option tables for easy specifying.
- Specify options such as fabrics and finishes while placing from manufacturer catalogs.
- Re-option product that was previously placed or add options.
- Easily Discount and order projects.
- Order Specials, COM's, add charges, track customer information, and more...

Tech Support:

1.) On the Internet:

www.projectmatrix.com (Contains full details on all of our software.)

2.) Phone & Fax Numbers:

p. 513-554-1665
f. 513-554-1255

3.) Postal Address:

11655 Lebanon Road, Cincinnati, Ohio 45241

4.) Electronic Mail:

General Information: info@projectmatrix.com
Sales: sales@projectmatrix.com
Technical Support: support@projectmatrix.com

Views


The ProjectSpec Interface

ProjectSpec offers two different formats for viewing your SIF files: **Classic** and **Spreadsheet.**

Below are sample images of the Classic and Spreadsheet views of a project. Red arrows and their labels point out main elements of the ProjectSpec interface that both views share in common.
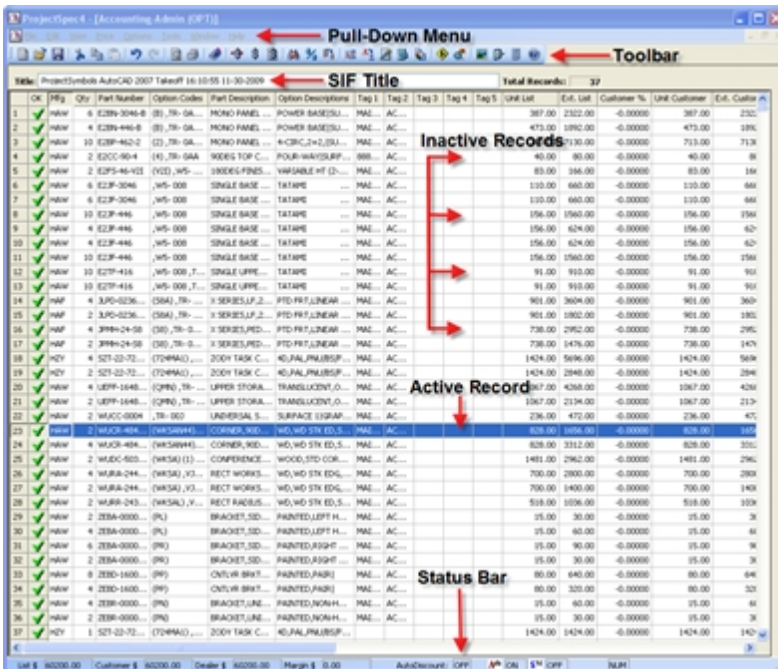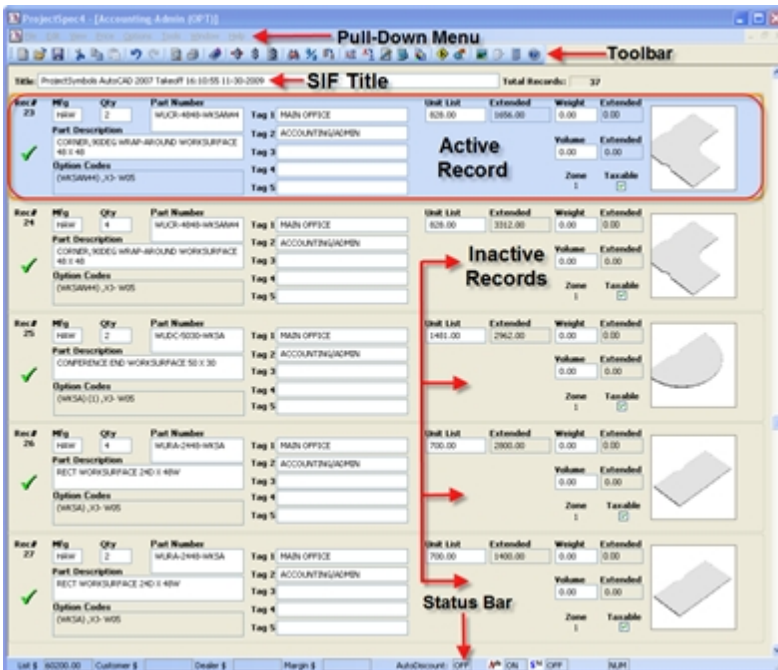

There are six important elements that both views of ProjectSpec share in common:

Pull-Down Menu- This functions like the pull-down menu in most computer applications. Click on the category and a menu will be pulled down. If there are further sub-menus, a small black arrow will appear next to the option.
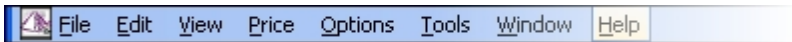
Toolbar- The toolbar allows the user to utilize the most common functions of ProjectSpec with a single click. Hold the mouse cursor over an icon for the function's name to appear in text.
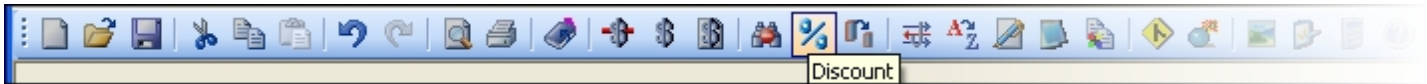
SIF Title- ProjectSpec allows the user to name their projects. Keep in mind, however, that when a SIF is generated from an AutoCAD Takeoff, a Title is automatically given to the project. The user can edit the Title field at any time.

Title: ProjectSymbols AutoCAD 2007 Takeoff 16:10:55 11-30-2009
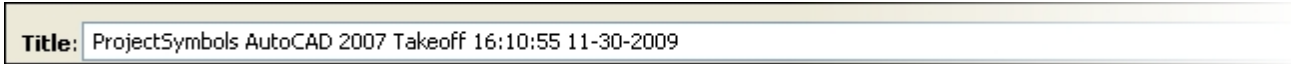
Active Record- To activate a record, click on it. This makes the record open to modification through many of ProjectSpec's functions. The active record is highlighted in blue, both in Classic and Spreadsheet view.

Inactive Records- These fill the remainder of the ProjectSpec interface. In Classic view, a total of 5 records (including the **Active Record**) can be displayed. In Spreadsheet view, ProjectSpec will display as many records as can fit on your computer monitor.

Status Bar- The Status Bar serves two distinct functions. The first function is to display the status of some of ProjectSpec's automatic functions and provide a one-click platform from which the user can enable and disable these features. The three automatic functions that the Status Bar tracks are AutoDiscount, AutoOptions, and StandardOptions. To enable or disable any of these functions, simply click on it.

The second function of the Status Bar is to control the visibility and format of pricing fields in the records of your SIF. If a field is turned on, it will appear in each record, and a total for the entire SIF will appear in the Status Bar. By default, only the "List" field is displayed. To display the "Customer", "Dealer", or "Margin" field, click on it. Please note that clicking on a field to display it will also display all fields to the left of it in the Status Bar. For example, clicking on the "Dealer" field will display the "Dealer", "Customer", and "List" fields.

Note- The "Margin" field has another important function. After it is displayed, click on it again to change the format to a percentage summary for the entire SIF. This will account for all the discounts than have been applied to the project. The "Margin" field will then display a percentage, as will the "Dealer" and "Customer" fields. The "List" field will display the total discount amount in dollars and its name will change to "Disc". To change the display back to a dollar amount, click on the "Margin" field again. Below is an example of the Status Bar displaying a percentage.
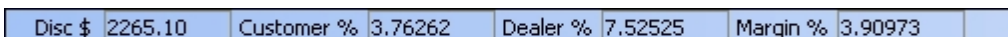
To deactivate a field, and all the fields to its right, click on the field to its left. For example, to disable the "Dealer" field, click on the "Customer" field. This will disable both the "Dealer" and "Margin" fields. If the "List" field is the only one being displayed, this too can be disabled by clicking on it. When a field is disabled, it will not appear on the records of the SIF.

Classic

Classic View

The purpose of Classic View is to display all of the most important fields in a record in a convenient layout. Below is an example of a record in Classic View. A total of 5 records can be displayed on-screen simultaneously in Classic View.

Classic View has many important fields, several of which can be used to access the more advanced functions of ProjectSpec.

Record #- Displays the numerical place the record occupies in the SIF.

Mfg Code- Three letter code representing the manufacturer of the part in the record. This field can be double-clicked to open the Catalog Viewer.

Part Quantity- The number of parts of this type. This number acts as a multiplier for values in the extended price and extended measurement fields.

Part Number- The number of the part in the record.

User Defined Tags- Sometimes imported from an AutoCAD Takeoff. The user can also modify these Tags at any time.

Unit Measurements- Part measurements that are sometimes provided by the manufacturer. The "Extended" field is the measurement of an individual part multiplied by the quantity.

Part Picture- A small preview of the part. Clicking on the picture opens a larger version for viewing. Right-clicking opens a small menu of Part Picture functions.

Status Icon- Displays a quick graphical status of the record. Below is a quick summary of the different icons. The specifics of each status will covered in depth in the appropriate section of the manual.

Incomplete: When this icon appears it means that there is missing data that is required, such as a part number or quantity, list price or options.

Added Charge (CHG): This icon represents lines that contain the CHG code in the manufacturer's field.

Error: This icon will appear if there is an error on the record. The error message should appear in the description field.

Customer's Own Material (COM): This icon represents lines that contain the COM code in the manufacturer's field.

Manual Override: This icon represents that a status was changed by the user, which can be done by clicking on an error or an incomplete icon.

Inquiries (INQ): This icon represents lines that contain the INQ code in the manufacturer's field.

Complete: This icon shows up if the record is complete. Completion is based on very general rules. Must have a part number and a price. Options are only included if added from the Catalog viewer.

Specials (SPC): This icon represents lines that contain the SPC code in the manufacturer's field.

Merged file: This icon shows that a merged file is present and has not been expanded.

Option Codes- These codes represent options that are specified by the user through the Catalog Viewer. Double-clicking inside the "Option Codes" field itself opens the Edit Options dialog. Double-clicking on the word "Option Codes" will cycle the display through "Option Codes", "Option Descriptions", and "Option Codes and Descriptions". These views can also

be activated by pressing (Alt+[), (Alt+]), (Alt+B), or through the pull-down menu View/Fields/Options.

Option Codes
~B K366 2 ~B K369 2 C V VE C

Option Descriptions
FABRIC, GRADE B
TEXTILE: BALANCE

Option Codes And Descriptions
~B | FABRIC, GRADE B
K366 | TEXTILE: BALANCE

Part Description- This field is populated by ProjectSpec after options have been specified for the record through the Catalog Viewer.

Pricing Fields- These fields are populated by ProjectSpec after options have been specified for the record through the Catalog Viewer. These fields can be toggled through the Status Bar. **Client View** disables the Dealer discounts and prices as well as calculated margins. This can be accessed through the pull-down menu View/Interface/Screen/Client. Below are examples of **Client View** and **Normal View**.

Unit List	Extended	Weight	Extended
713.00	7130.00	0.00	0.00

Customer	-0.00000	Volume	Extended
713.00	7130.00	0.00	0.00

Normal View

Dealer	-0.00000	Zone	Taxable
713.00	7130.00	1	☑

Unit List	Extended	Weight	Extended
713.00	7130.00	0.00	0.00

Customer	-0.00000	Volume	Extended
713.00	7130.00	0.00	0.00

Client View

		Zone	Taxable
		1	☑

Pricing Zone- Usually determined by the manufacturer.

Taxable Indicator- Determines if the record is subject to tax.

SpreadSheet

Spreadsheet View

Spreadsheet view allows the user access to more fields than Classic view. Also, as many records will be displayed as can fit on the monitor.

There are two different formats in Spreadsheet View, "Normal" and "Display Options Vertically". To display each Option Code on its own line in the Option Codes column, access the pull-down menu View/Interface/Spreadsheet/Display Options Vertically. Below are examples of both Spreadsheet view formats. Note how in the second example, the individual Option Codes are arranged vertically. This makes for easier viewing at the expense of the total number of records visible on-screen simultaneously.

	OK	Mfg	Qty	Part Number	Option Codes	Part Description	Option Descriptions	Tag 1	Tag 2	Tag 3	Tag 4	Tag 5	Unit List	Ext. List	Zone	Taxable
1	✔	HAW	6	E2BN-3046-B	(B) ,TR- 0A...	MONO PANEL ...	POWER BASE|SU...	MAI...	AC...				387.00	2322.00	1	Y
2	✔	HAW	4	E2BN-446-B	(B) ,TR- 0A...	MONO PANEL ...	POWER BASE|SU...	MAI...	AC...				473.00	1892.00	1	N
3	✔	HAW	10	E2BP-462-2	(2) ,TR- 0A...	MONO PANEL ...	4-CIRC,2+2,|SU...	MAI...	AC...				713.00	7130.00	1	Y
4	✔	HAW	2	E2CC-90-4	(4) ,TR- 0AA	90DEG TOP C...	FOUR-WAY|SURF...	MAI...	AC...				40.00	80.00	1	Y
5	✔	HAW	2	E2FS-46-V2I	(V2I) ,WS- ...	180DEG FINIS...	VARIABLE HT (2-...	MAI...	AC...				83.00	166.00	1	Y
6	✔	HAW	6	E2JF-3046	,WS- 008	SINGLE BASE ...	TATAMI	MAI...	AC...				110.00	660.00	1	N
7	✔	HAW	6	E2JF-3046	,WS- 008	SINGLE BASE ...	TATAMI	MAI...	AC...				110.00	660.00	1	N

	OK	Mfg	Qty	Part Number	Option Codes	Part Description	Option Descriptions	Tag 1	Tag 2	Tag 3	Tag 4	Tag 5	Unit List	Ext. List	Zone	Taxable
1	✔	HAW	6	E2BN-3046-B	(B) ,TR- 0AA ,TR- 0AA	MONO PANEL CORE-NO SURF OPTION,SQ TOP CAP,NO-PWR,30 X 48"H	POWER BASE SURFACE 1 PUTTY SURFACE 2 PUTTY	MAI...	AC...				387.00	2322.00	1	Y
2	✔	HAW	4	E2BN-446-B	(B) ,TR- 0AA ,TR- 0AA	MONO PANEL CORE-NO SURF OPTION,SQ TOP CAP,NO-PWR,48 X 48"H	POWER BASE SURFACE 1 PUTTY SURFACE 2 PUTTY	MAI...	AC...				473.00	1892.00	1	N
3	✔	HAW	10	E2BP-462-2	(2) ,TR- 0AA ,TR- 0AA	MONO PANEL CORE-NO SURF OPTION,SQ TOP CAP,W/PWR,48" X 64"H	4-CIRC,2+2, SURFACE 1 PUTTY SURFACE 2 PUTTY	MAI...	AC...				713.00	7130.00	1	Y
	✔	HAW		CC-90-4		90DEG T	F...	MAI...					40.00	80	1	

There is an additional viewing option for Spreadsheet View, "Detail View". This displays the active record in "Classic View" format at the bottom of the Spreadsheet screen. To display "Detail View", access the pull-down menu View/Interface/Spreadsheet/Detail View. Below is an example of "Detail View".

Note- To cycle through all of the ProjectSpec interface views, press (F12).

	OK	Mfg	Qty	Part Number	Option Codes	Part Description	Option Descriptions	Tag 1	Tag 2	Tag 3	Tag 4	Tag 5	Unit List	Ext. List	Zone	Taxable
3					0AA	SURF OPTION,SQ TOP CAP,W/PWR,48" X 64"H	...RF... PUTTY SURFACE 2 PUTTY									
4	✔	HAW	2	E2CC-90-4	(4) ,TR- 0AA	90DEG TOP CAP,FOR 2-, 3-, OR 4-WAY	FOUR-WAY SURFACE 1 PUTTY	MAI...	AC...				40.00	80.00	1	Y
5	✔	HAW	2	E2FS-46-V2I	(V2I) ,WS- 008 ,TR- 0AA ,TR- 0AA	180DEG FINISH POST,FABRIC...	VARIABLE HT (2-WAY STRGHT CAP) TATAMI GRADE A SAFFRON SURFACE 2 PUTTY SURFACE 3 PUTTY	MAI...	AC...				83.00	166.00	1	Y
	✔	HAW	6	E2JF-3046	,WS-	SINGLE BASE	TATAMI GRADE A	MAI...	AC...				110.00	660.00	1	N

Rec#	Mfg	Qty	Part Number				
4	HAW	2	E2CC-90-4	Tag 1	MAIN OFFICE	Unit List 40.00	Extended 80.00
	Part Description			Tag 2	ACCOUNTING/ADMIN	Weight 0.00	Extended 0.00
✔	90DEG TOP CAP,FOR 2-, 3-, OR 4-WAY			Tag 3		Volume 0.00	Extended 0.00
	Option Codes			Tag 4			
	FOUR-WAY			Tag 5		Zone 1	Taxable ☑
	SURFACE 1						

The user can also specify what columns they would like to be displayed and in which order. There are many possible fields, and not all of them may be necessary all the time. To select the columns you wish displayed, click the Set Spreadsheet Column Display icon 🔲 , press (Alt+C), or access the pull-down menu View/Fields/Spreadsheet

Columns. This opens the Spreadsheet Columns Displayed dialog box. To add a column, make sure its box is checked.
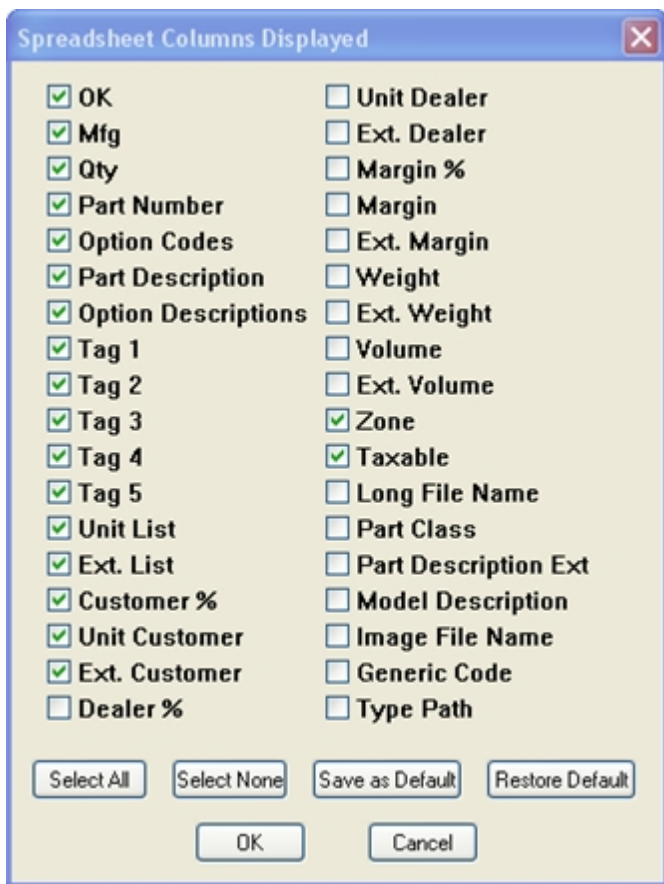
There are six buttons in the Spreadsheet Columns Displayed dialog.

Select All- Checks every box.

Select None- Removes the check from every box.

Save as Default- Makes the current configuration of checked and not checked boxes the default setting for Spreadsheet View.

Restore Default- Returns the configuration of checked and not checked boxes to the previously saved default.

OK- Applies the configuration of checked and not checked boxes to the current Spreadsheet View and closes the dialog.

Cancel- Does nothing, closes the dialog, and returns to Spreadsheet View.

To move a column, right-click on the column header and drag it to where you would like it. For example, if you would like the Option Descriptions column to the left of the Part Description column, right click on the words "Option Descriptions" and drag them to the left. The position of columns is also accounted for in the **Save as Default** and **Restore Default** functions of the Spreadsheet Columns Displayed dialog.

Catalog Manager

Catalog Manager

The ProjectSpec Catalog Manager allows the user to organize their installed catalogs. You can open and close catalogs, control which catalogs are active or inactive, and change where your catalogs are located. The Catalog Manager can be accessed through the pull-down menu Tools/Catalog Manager.

Click the links below to view more information.
Activate/Deactivate Catalogs
Catalog Paths
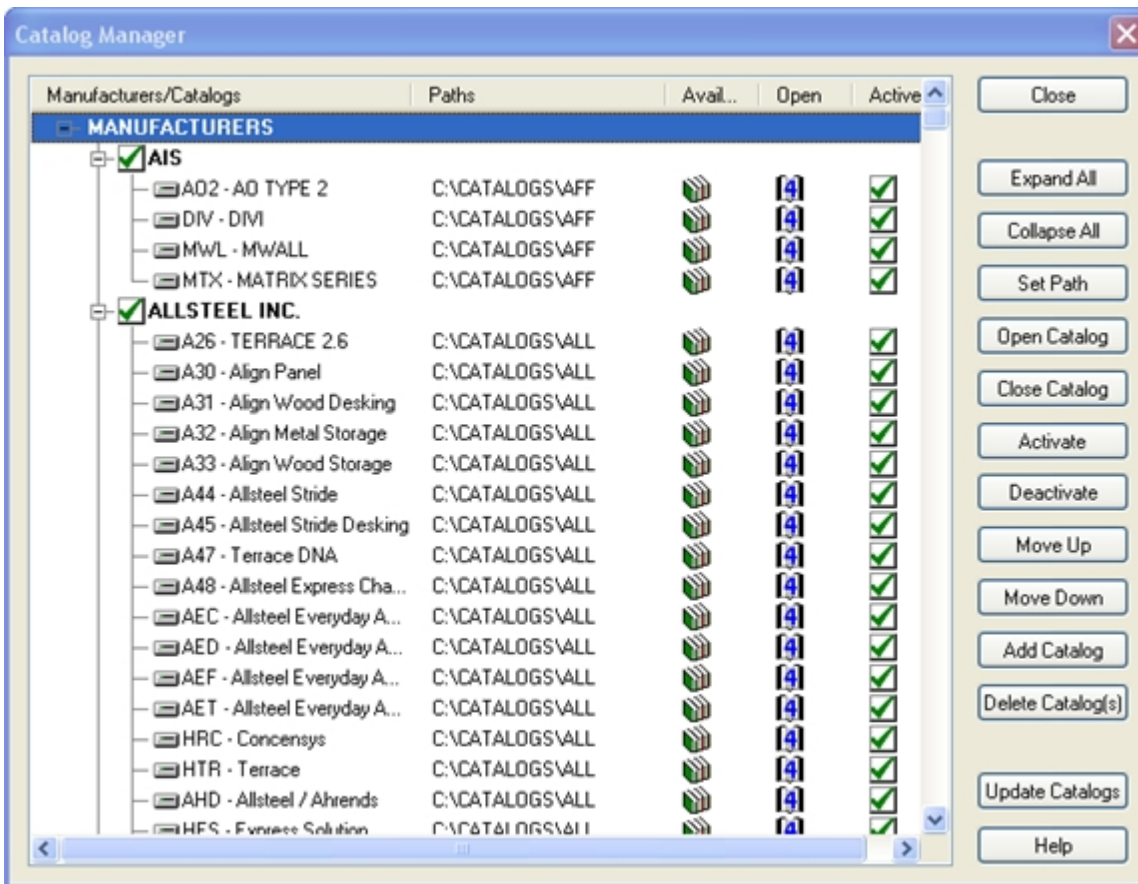
Activate/Deactivate

Activate & Deactivate Catalogs

A catalog can not only be opened or closed, it can also be active or inactive. The active status of a catalog tells ProjectSpec if a catalog should be searched or used for pricing or options. This allows catalogs that are not needed to be removed from the search criteria and speeds up searches for parts and options.

Note- If a catalog is closed, it can not be activated.

To set a catalog active:
1. Select the Catalog or Manufacturer that you wish to Activate.
2. Press the "Activate" button on the right.
3. The icon should now change to the active icon. ✅

To set a catalog inactive:
1. Select the Catalog or Manufacturer that you wish to Deactivate.
2. Press the "Deactivate" button on the right.
3. The icon should now change to the Inactive icon. ❌
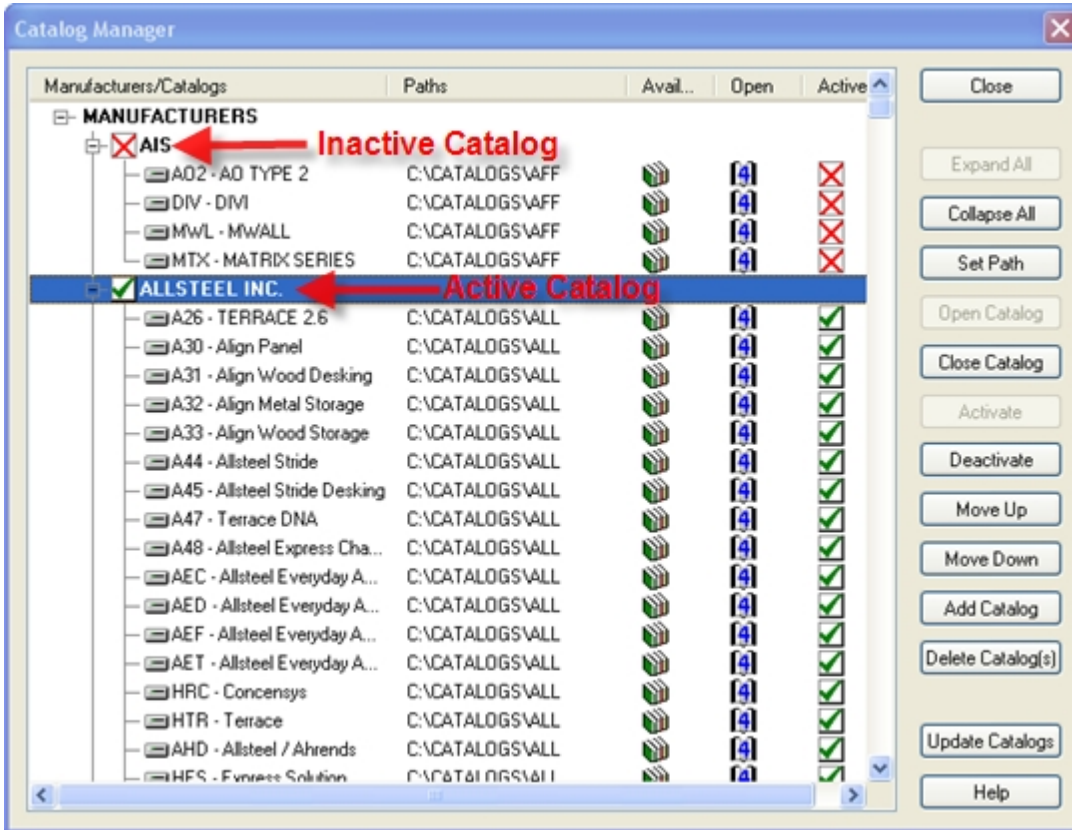
Note- To Activate or Deactivate all the manufacturers in your catalog manager at one time, click the first MFG in the list, hold down the SHIFT key, and then select the last catalog in the list. Then press the Activate or Deactivate button. You can also use the "CTRL+Click" method to select multiple manufacturers.
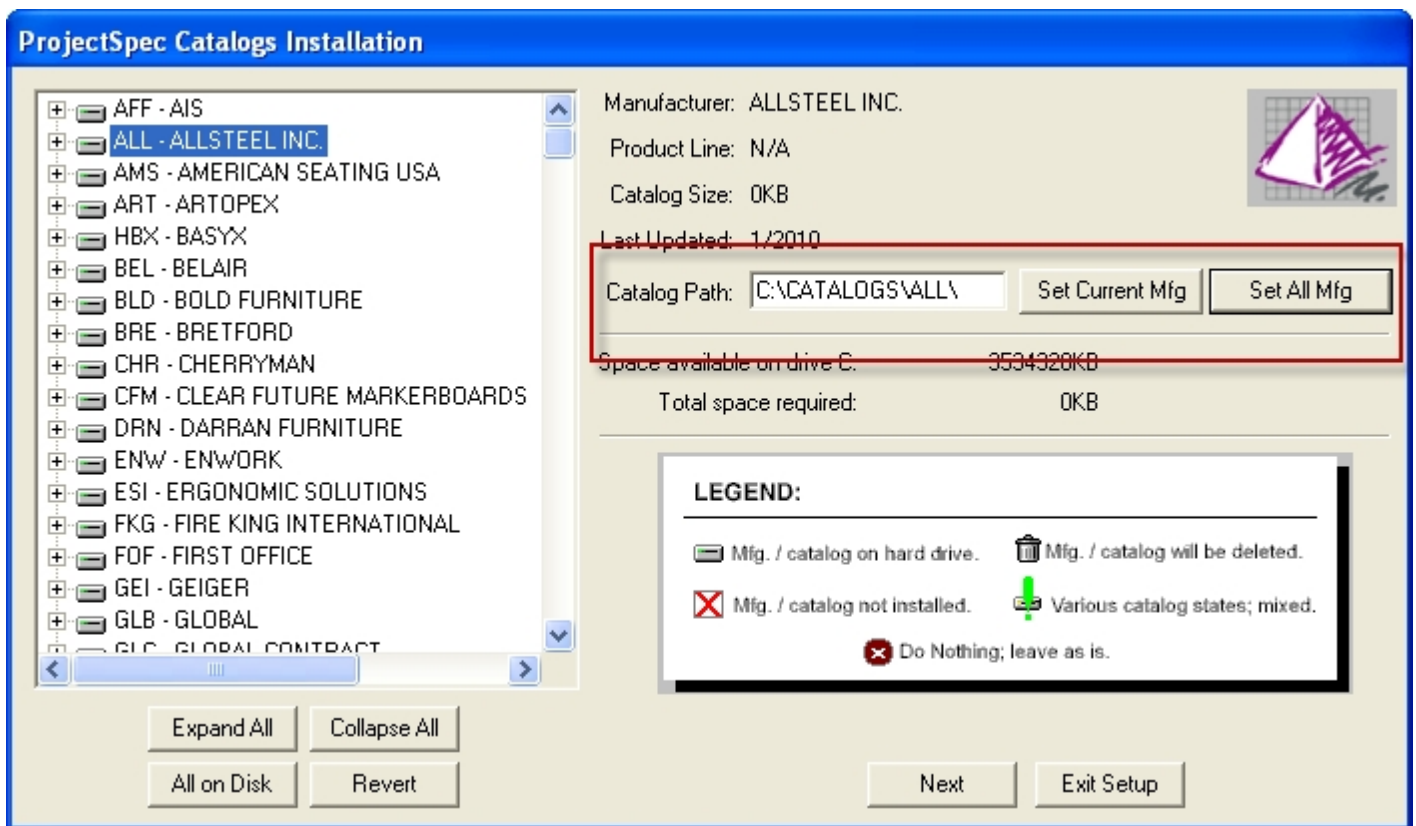
Paths

Paths for Catalog Manager

The ProjectSpec electronic catalogs can be stored locally or network based. Standard default installs of the electronic catalogs go to **C:\Catalogs***MFG FOLDER.* During the installation of the catalogs you may choose where these catalogs go.
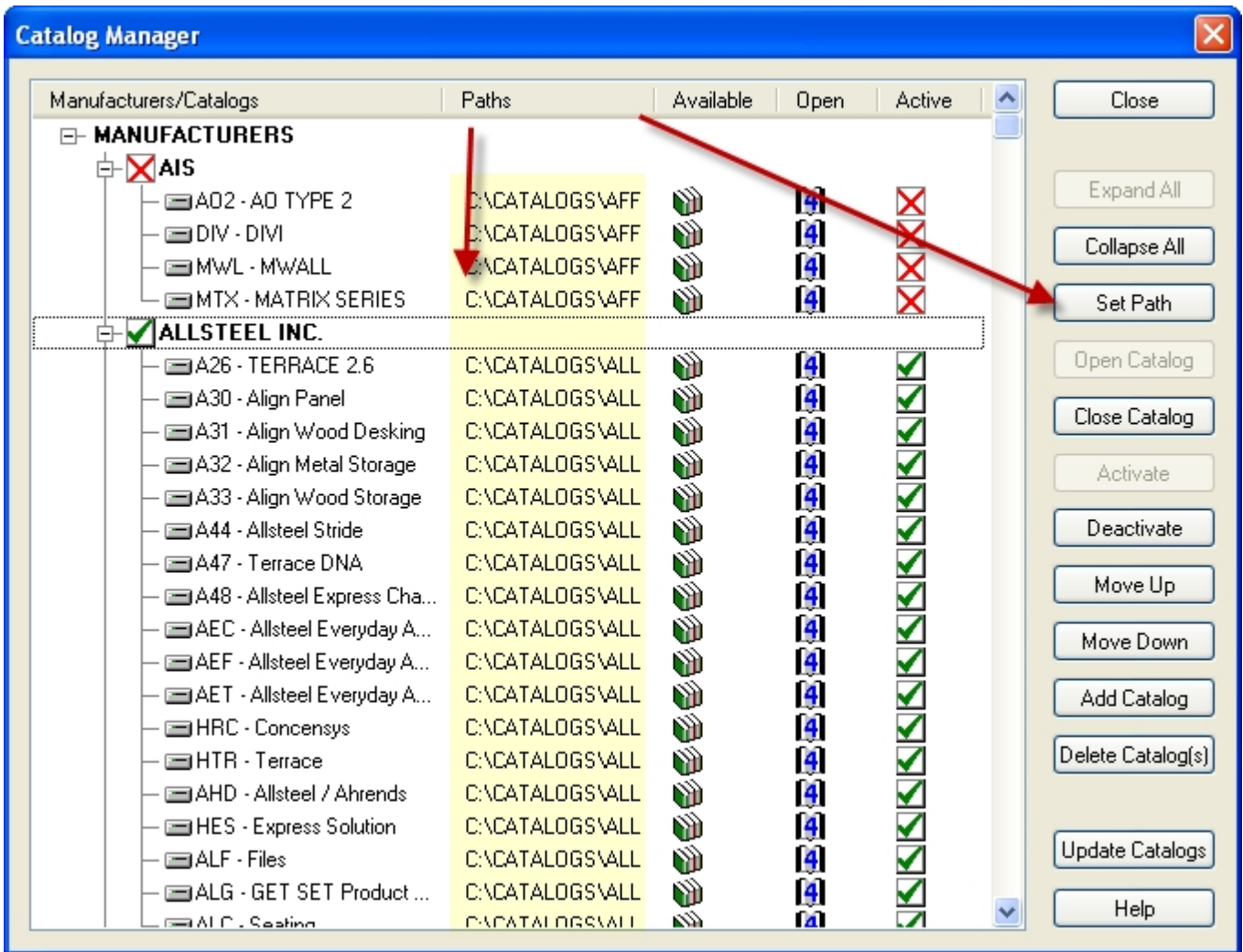
ProjectSpec Catalogs Installation Screen: (Accessible during the initial installation of ProjectSpec)

You can use the "Set Current Mfg" or "Set All Mfg" buttons to change the default locations of the catalogs. Once you set this path
future installs will continue to use the path specified.

ProjectSpec Catalogs Installation

AFF - AIS	
ALL - ALLSTEEL INC.	
AMS - AMERICAN SEATING USA	
ART - ARTOPEX	
HBX - BASYX	
BEL - BELAIR	
BLD - BOLD FURNITURE	
BRE - BRETFORD	
CHR - CHERRYMAN	
CFM - CLEAR FUTURE MARKERBOARDS	
DRN - DARRAN FURNITURE	
ENW - ENWORK	
ESI - ERGONOMIC SOLUTIONS	
FKG - FIRE KING INTERNATIONAL	
FOF - FIRST OFFICE	
GEI - GEIGER	
GLB - GLOBAL	
GLC - GLOBAL CONTRACT	

Manufacturer: ALLSTEEL INC.

Product Line: N/A

Catalog Size: 0KB

Last Updated: 1/2010

Catalog Path: C:\CATALOGS\ALL\   [Set Current Mfg]   [Set All Mfg]

Space available on drive C: 3534328KB

Total space required: 0KB

LEGEND:

Mfg. / catalog on hard drive.   Mfg. / catalog will be deleted.

Mfg. / catalog not installed.   Various catalog states; mixed.

Do Nothing; leave as is.

[Expand All] [Collapse All]

[All on Disk] [Revert]

[Next] [Exit Setup]

Changing the Current Path for Catalogs:

If you need to change the location of catalogs after they are installed, use the "Set Path" button and then browse for the proper
3-letter code folder.

Catalog Manager

Manufacturers/Catalogs	Paths	Available	Open	Active	
☐ **MANUFACTURERS**					
☐ ☒ **AIS**					
▭ A02 - A0 TYPE 2	C:\CATALOGS\AFF	📦	[4]	☒	
▭ DIV - DIVI	C:\CATALOGS\AFF	📦	[4]	☒	
▭ MWL - MWALL	C:\CATALOGS\AFF	📦	[4]	☒	
▭ MTX - MATRIX SERIES	C:\CATALOGS\AFF	📦	[4]	☒	
☐ ✓ **ALLSTEEL INC.**					
▭ A26 - TERRACE 2.6	C:\CATALOGS\ALL	📦	[4]	✓	
▭ A30 - Align Panel	C:\CATALOGS\ALL	📦	[4]	✓	
▭ A31 - Align Wood Desking	C:\CATALOGS\ALL	📦	[4]	✓	
▭ A32 - Align Metal Storage	C:\CATALOGS\ALL	📦	[4]	✓	
▭ A33 - Align Wood Storage	C:\CATALOGS\ALL	📦	[4]	✓	
▭ A44 - Allsteel Stride	C:\CATALOGS\ALL	📦	[4]	✓	
▭ A47 - Terrace DNA	C:\CATALOGS\ALL	📦	[4]	✓	
▭ A48 - Allsteel Express Cha...	C:\CATALOGS\ALL	📦	[4]	✓	
▭ AEC - Allsteel Everyday A...	C:\CATALOGS\ALL	📦	[4]	✓	
▭ AEF - Allsteel Everyday A...	C:\CATALOGS\ALL	📦	[4]	✓	
▭ AET - Allsteel Everyday A...	C:\CATALOGS\ALL	📦	[4]	✓	
▭ HRC - Concensys	C:\CATALOGS\ALL	📦	[4]	✓	
▭ HTR - Terrace	C:\CATALOGS\ALL	📦	[4]	✓	
▭ AHD - Allsteel / Ahrends	C:\CATALOGS\ALL	📦	[4]	✓	
▭ HES - Express Solution	C:\CATALOGS\ALL	📦	[4]	✓	
▭ ALF - Files	C:\CATALOGS\ALL	📦	[4]	✓	
▭ ALG - GET SET Product ...	C:\CATALOGS\ALL	📦	[4]	✓	
▭ ALC - Seating	C:\CATALOGS\ALL	📦	[4]	✓	

Buttons:
- Close
- Expand All
- Collapse All
- Set Path
- Open Catalog
- Close Catalog
- Activate
- Deactivate
- Move Up
- Move Down
- Add Catalog
- Delete Catalog(s)
- Update Catalogs
- Help

Creating a SIF

Creating a SIF

This section will help you understand the basics of creating a SIF file in ProjectSpec.

Click on the links below to learn more:
AutoCAD Takeoff
Catalog Viewer
Part Number
WildCard

Take-Off

Using an AutoCAD drawing Takeoff

In AutoCAD:

Once you have completed a design layout in AutoCAD, you can build a parts list and quote in ProjectSpec. To get all of the information from your drawing to ProjectSpec you will be using the "SIF Out" command. SIF Out is the process of creating a SIF file. This file will contain a list of all the symbols that you select. Once the file is created you can open this file in ProjectSpec and then option out, price, discount, and build a quote from the SIF file.

After the SIF Out command has been executed the AutoCAD command line will read "Select objects". Choose the symbols you wish to include in the SIF file. After you have selected the appropriate symbols the SIF Takeoff window will appear.
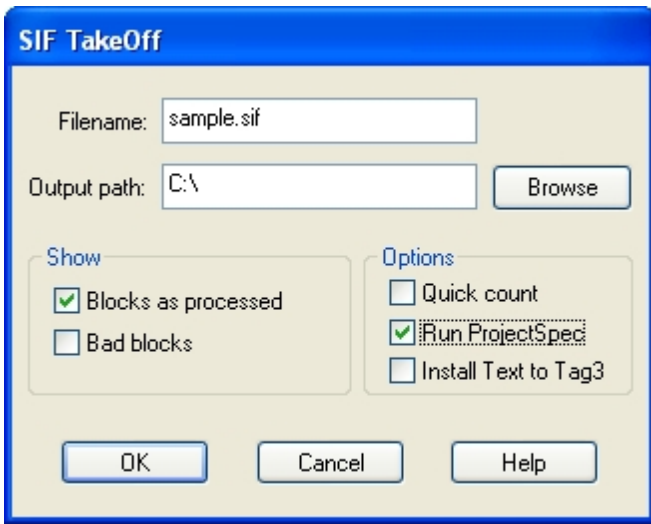
In ProjectSpec:

Once ProjectSpec opens, you should see populated records reflecting your Bill of Materials. In the example below the items highlighted in GREEN are those fields which will automatically populate once brought into ProjectSpec. The columns in YELLOW will fill in once you select the "Price from Catalog" 💲 on the

toolbar. This will validate the parts from Active catalogs and add the list pricing as well as the Part Description. Note the SIF Title is populated with the Date and Time that the drawing SIF was done. The user can change the Title field at any time.

Catalog Viewer

Placing from Catalog Viewer

The Catalog Viewer is used to add parts or to apply options to a part. The Catalog Viewer will open to the Mfg Code of the active record. If available, it then goes to the active record's part number in that manufacturer's catalog. After finding the active record's part number it will prompt the user for options for that part. In doing this, the incomplete record will have an updated List Price and any options selected by the user and any other information contained in that manufacturers catalog will be available. Click "Accept" to finalize the options you have chosen and return to the active record.

To use the Catalog Viewer for the active record:

      1. Click the Catalog Viewer icon or Press the F2 key.
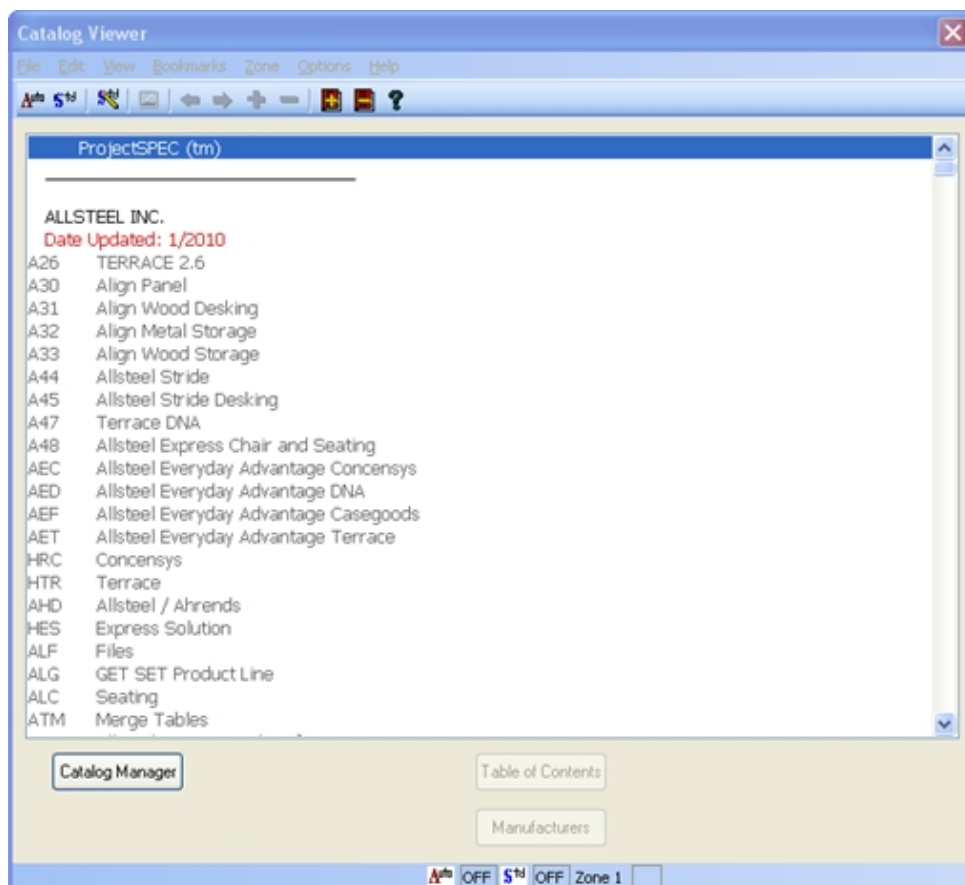
      2. Double click on a Manufacturer's catalog. This list is from the active catalog list maintained in the Catalog Manager.
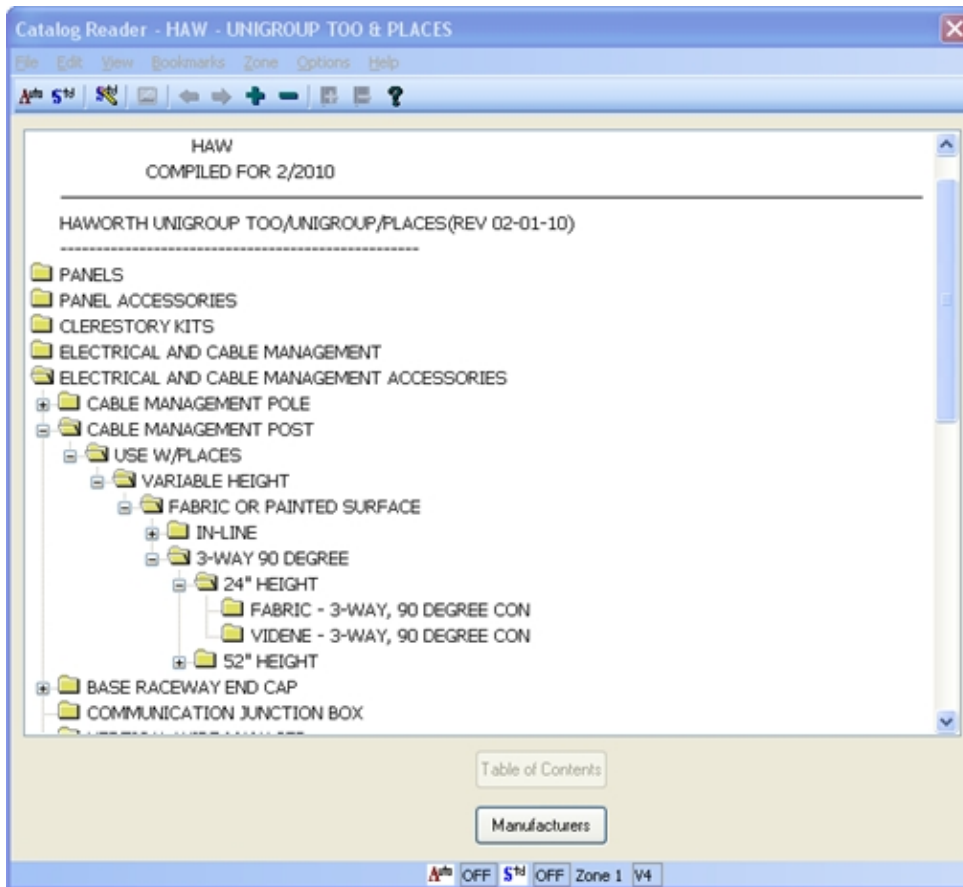
3. Click through the electronic catalog until you reach a part number. Notice as you make your selections the next choice is indented to the right.

4. When a list of part numbers appears, choose the part that you are looking for. If the part desired is not found in this list, select the back arrow from the Catalog Viewer's toolbar. This will allow you to select a different path containing different parts.

5. After selecting the desired part number, ProjectSpec will prompt for options for that part, if it contains them, and will continue to prompt until all options are chosen.

6. Press the "Accept" button when complete.
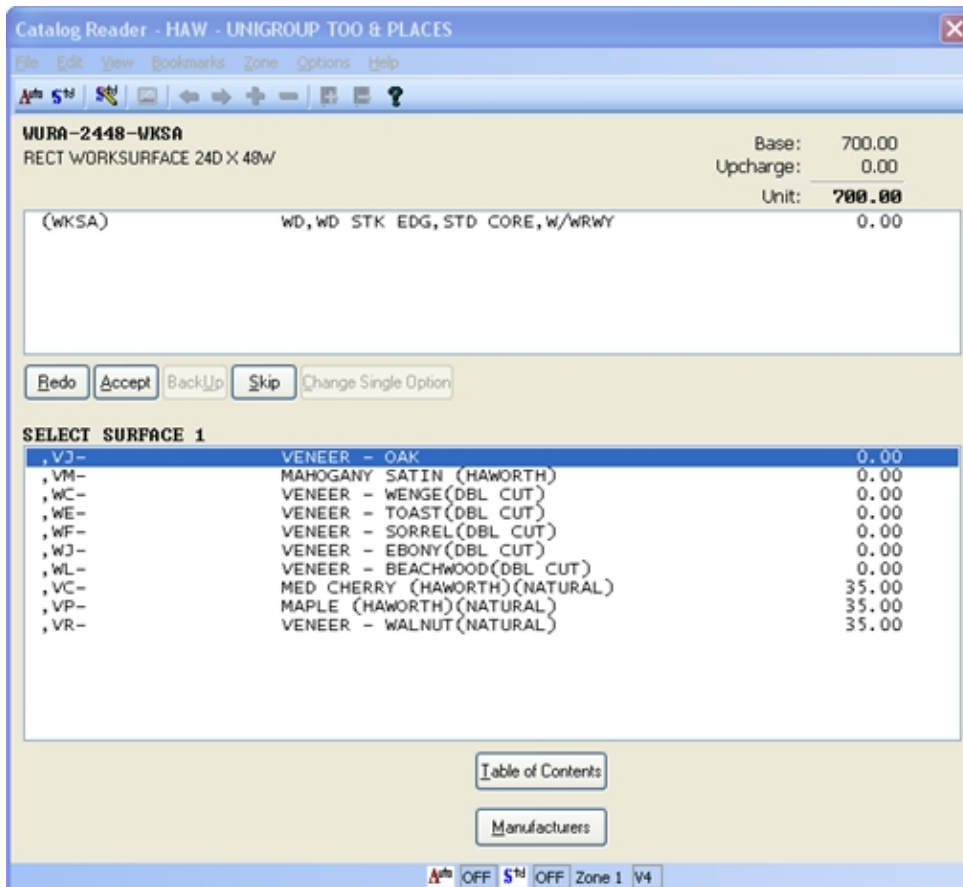
7. Enter the Quantity.
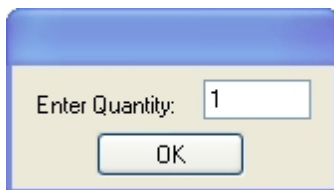
Part Number

Placing by Part Number

When populating a record it is possible to enter only the part number and then press (F2). This method will (1) check the part number, (2) find the all of the Manufacturers in the active Catalog that have a product by that number, and (3) prompt for any missing option codes that part may need. It will also update the parts description and list price from the catalog.

Note: If you are creating records using only a small number of manufacturers, remember to deactivate unneeded catalogs. This will make the search process much faster.

(1) ProjectSpec searches for all entries with that product number.

Searching for part:	HKTE-17-MP
Searching in catalog:	HHO
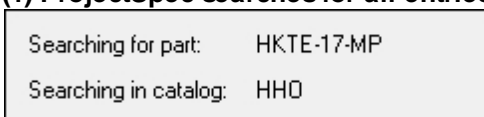
(2) Manufacturers carrying that number appear. Select the one you need.
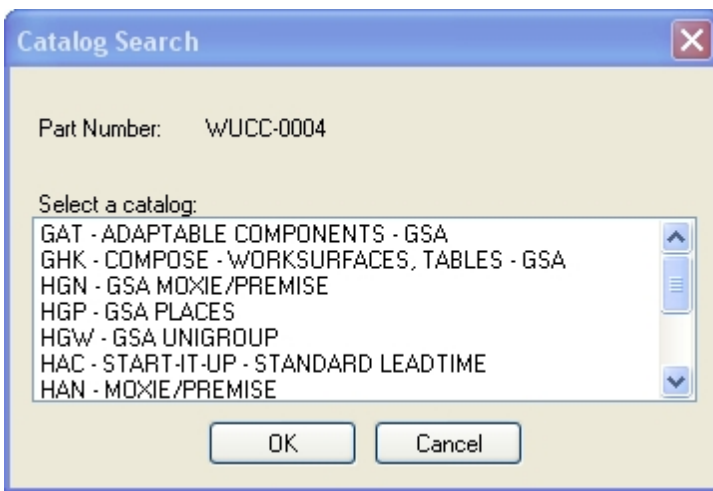
(3) Add options.
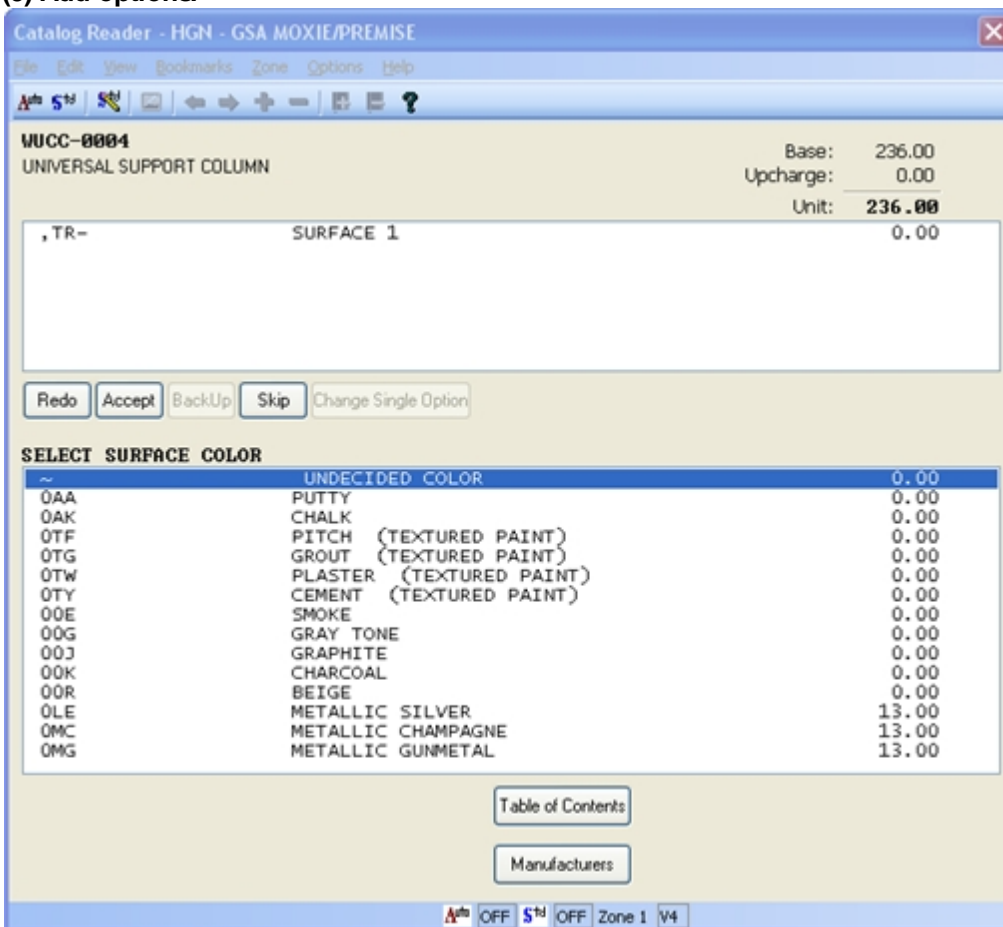
WildCard

Using WildCard Search

Sometimes you may know only a portion of a part number and can not find it in the catalog. If this is the case, you may have to do a Wild Card search. You can search all the active catalogs or just one catalog for that part.

> 1. Press the F2 key or select the Catalog Viewer Icon from a blank record in ProjectSpec. This will bring up the

Catalog Viewer screen.

      2. Press the F2 Key again to begin the search command.

      3. In the "Part Number" box, enter the portion of the part number that you know replacing the unknown with an asterisk (*).

      4. In the "Look In" box select a catalog or a Manufacturer or select "All Active Manufacturers".

      5. Click the "Find Now" button.

      6. Select the part number that meets your needs.
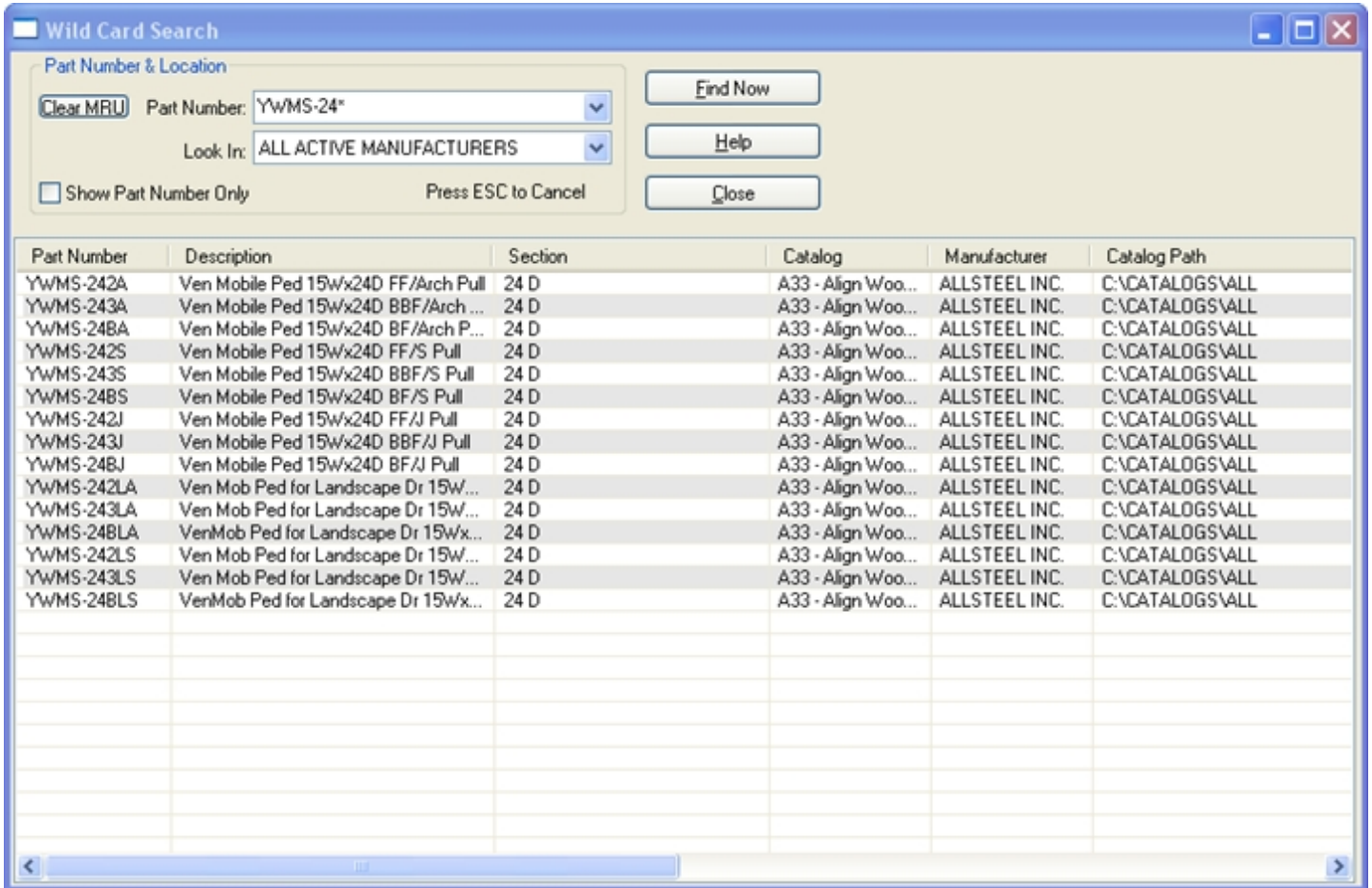
A "WILDCARD" can be used anywhere in the part number. For Example a 24 x 36 rectangular work surface may be WS2436. You can use the the following wildcard placements:

WS*	Finds all sizes of Worksurfaces or parts that start with WS.
WS*36	Finds all depths available for the 36 inch wide surface.
WS24*	Finds all lengths available for the 24 inch deep surface

Tag

Tags
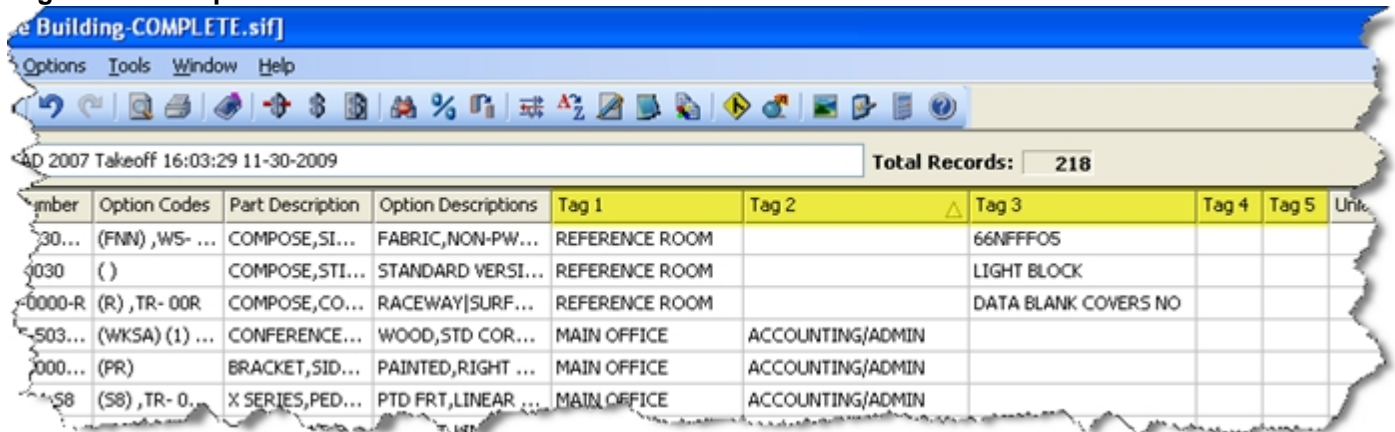
Each record in ProjectSpec has 5 fields for user-defined Tags. Each field has a 20 character maximum.

Note- Not all other software programs and manufacturer ordering systems will allow 20 character tags. Therefore, prior to submitting your order,please check with your manufacturers about which tags they read from a .SIF file and what their character maximum is.

Drawings are often tagged. These tags appear in SIF takeoffs from AutoCAD. If you need to modify or add/remove tags from the SIF file, you can use these options:
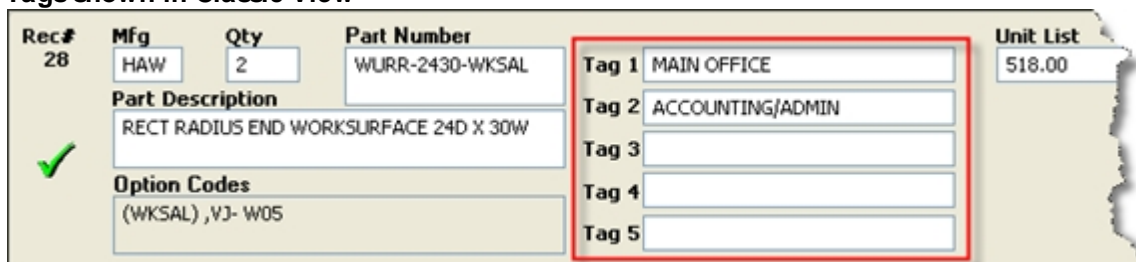
1. Simply click in a tag field and type in the new tag or edit an existing one.

2. Use the [F3] ([Field Repeat](#)) to copy the tag from one record to another.

3. Use the [Replace](#) command to edit or add/remove multiple records.

Tags shown in Spreadsheet view:

Tags shown in Classic View

Replace

Replace

The Replace function allows the user to find the data in any field and replace it with something else. What makes this function particularly useful is the ability to specify which records are to be included in the search. You can quickly replace a word or phrase with a different word or phrase. This functions much like a traditional "find and replace" command from Windows based programs like Word.

The Replace dialogue box has two halves, upper and lower. The upper half defines which record(s) will be included in the "Find" portion of the function. The lower half allows the user to define what data they are looking for, and with what they would like to replace it.

To replace the data in a field:

1. Click the Replace Icon , press (Ctrl+R), or access the pull-down menu Edit/Replace.
2. Fill in your selection requirements.
3. In the "Find the Text" box, enter the text you want to find.
4. In the "In the Field" box, select which field you want to search in.
5. In the "Replace With" box, enter the replacement text.
6. Press the "Replace" button.

The table below provides some examples of ways in which the user might use the Replace function.

When you might use it:	Examples:	How To:
● Tagging	Instead of just doing a straight Replace from something like "PHASE 1" to "PHASE 2", you can actually replace empty Tags	Leave the "Find the Text:" field Blank. Choose the appropriate tag number from the "In the Field" pull-down, and then type in your new tag in the "Replace With:"

When you might use it:	Examples:	How To:
	and add new tags.	
• Changing Options or Finishes	The customer changes their mind from a White Laminate to a Black Laminate.	Find the Option code for White (Example: 00W) In the "Find the Text:" field type in the option code EXACTLY as you see it in the SIF and then Choose OPTION CODES from the pull-down and then use the code for Black in the "Replace With:" field. (Example: 0BL) After the REPLACE finishes, it will ask you if you want to Update the Pricing. Say "YES". This will validate that the new code you entered is correct and will also adjust the price if there was any upcharge for the new finish color.
• Changing MFG codes	You want to see if the products are available from the Manufacturers "Quick Ship" or "Express" catalogs.	Type the 3-letter MFG code in the "Find the Text:" and then choose "MFG" from the pull-down. Enter then new 3-letter MFG code in the "Replace With:" field. After the REPLACE finishes, it will ask you if you want to Update the Pricing. Say "YES". This will validate that the new MFG code you entered is valid for that part and will also adjust the price if there was any adjustment for the new catalog.
• Changing Price Zones	Some manufacturers use Price Zones to separate US and Canada, or Current from Previous pricing. Zones 1-6 are available, but not all of them are used by all manufacturers.	Type the number of the zone code in the "Find the Text:" and then choose "Zone" from the pull-down. Enter then new zone number in the "Replace With:" field. After the REPLACE finishes, it will ask you if you want to Update the Pricing. Say "YES". This will validate that the new Zone you entered is valid for that part and will also adjust the price if there was any adjustment for the Pricing Zone.
• Changing Part Number	You want to change all the Sled base chairs to Stacking chairs.	Type the existing Part Number (Example: ch001-sld) in the "Find the Text:" and then choose "Part Number" from the pull-down. Enter then new Part Number (Example: ch002-stk) in the "Replace With:" field. After the REPLACE finishes, it will ask you if you want to Update the Pricing. Say "YES". This will validate that the new Part Number you entered is valid and will also adjust the price if there was any adjustment for the item.
• Changing Taxable Preference	Change from Yes to No or vise versa in the Taxable field.	Type "Y" or "N" in the "Find the Text:" and then choose "Taxable" from the pull-down. Enter "Y" or "N" in the "Replace With:" field.

Find

The Find function allows the user to find the data in any field. What makes this function particularly useful is the ability to specify which records are to be included in the search. This functions much like a traditional "Find" command from Windows based programs like Word.

The Find dialogue box has two halves, upper and lower. The upper half defines which record(s) will be included in the "Find" portion of the function. The lower half allows the user to define what data they are looking for.

To Find the data in a field:

1. Use the "Edit" menu and then "Find", or press (Ctrl+F).
2. Fill in your selection requirements.
3. In the "Find the Text" box, enter the text you want to find.
4. In the "In the Field" box, select which field you want to search in.
5. Use the "Find Next" button.

Join

ProjectSpec has the ability to combine like records into a single record, retaining the sum of their quantities.

1. Click on the "Join" icon in the ProjectSpec Toolbar   , press (F6), or access the drop-down menu Edit/Join.
2. Uncheck any fields that you do not want to appear in the combined record.
3. Click the "OK" button.

Join Matching Records

Select Fields

- ☑ Part Number
- ☑ Manufacturer Code
- ☑ Generic Code
- ☑ Part Description
- ☑ Option Names
- ☑ Option Descriptions
- ☑ Tag 1
- ☑ Tag 2
- ☑ Tag 3
- ☑ Tag 4
- ☑ Tag 5
- ☑ List Price
- ☑ Customer Percent
- ☑ Dealer Percent
- ☑ Weight
- ☑ Volume
- ☑ Zone

[OK]   [Cancel]   [Help]
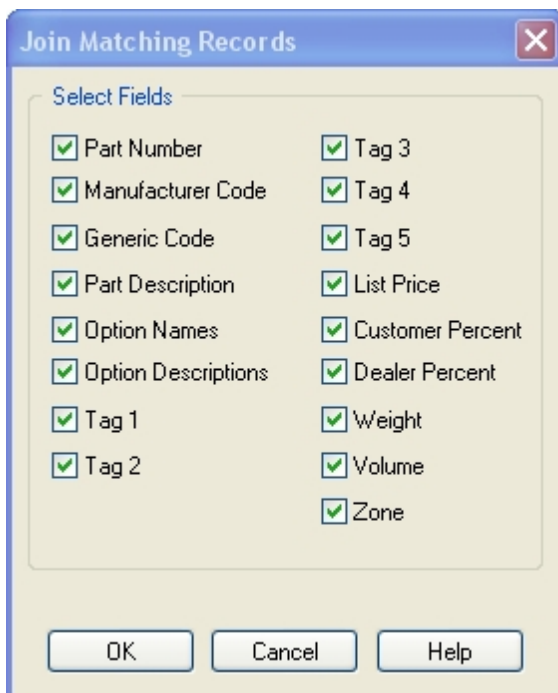
Sort Order

Sort Order

ProjectSpec allows the user to sort all of the records in a SIF. Sorting a file will make it quicker and easier to select groups and find particular records in larger files. You can sort by multiple fields inside of ProjectSpec.

To sort the records in a SIF file:

1. Click the Sort Icon [icon], or go to the pull-down menu Edit/Sort.
2. Select first field to sort by.
3. Then choose ascending or descending.
4. Repeat steps 2 and 3 for the remaining fields. For a total of three fields if needed.
5. Press the "Sort" button.

This method works both in Classic View and Spreadsheet view.

In Spreadsheet View, the user can left-click on the Header Row of any column. This will sort the records by that column in ascending order. Clicking a second time will re-sort the records in descending order.

ProjectSpec4 - [Accounting-Admin (OPT)]

File Edit View Price Options Tools Window Help

Left Click

...ools AutoCAD 2007 Takeoff 16:10:55 11-30-2009   **Total Records:** 38

	OK	Mfc	Qty	Part Number	Option Codes	Part Description	Option Descriptions	Tag 1	Tag 2	Tag 3	Tag 4	Tag 5	Unit List	Ext. List	Customer %
1	✔	HAF	4	JPMH-24-S8	(S8) ,TR- 0...	X SERIES,PED...	PTD FRT,LINEAR ...	MAI...	AC...				738.00	2952.00	-0.00000
2	✔	HAF	2	JLPD-0236...	(S8A) ,TR- ...	X SERIES,LF,2...	PTD FRT,LINEAR ...	MAI...	AC...				901.00	1802.00	-0.0000
3	✔	HAF	4	JLPD-0236...	(S8A) ,TR- ...	X SERIES,LF,2...	PTD FRT,LINEAR ...	MAI...	AC...				901.00	3604.00	-0.00000
4	✔	HAF	2	JPMH-24-S8	(S8) ,TR- 0...	X SERIES,PED...	PTD FRT,LINEAR ...	MAI...	AC...				738.00	1476.00	-0.00000
5	✔	HAW	4	E2JF-446	,WS- 008	SINGLE BASE ...	TATAMI ...	MAI...	AC...				156.00	624.00	-0.0000
6	✔	HAW	4	E2BN-446-B	(B) ,TR- 0A...	MONO PANEL ...	POWER BASE|SU...	MAI...	AC...				473.00	1892.00	-0.00000
7	✔	HAW	1	HCCP-002...	(F4) ,C2- 0...	VARIABLE HG...	FABRIC - 3-WAY,...						170.00	170.00	0.000

Pricing

Pricing a SIF File

ProjectSpec offers three ways to price your SIF file.

Price Line

Price Line will update the active record's price and description along with any option description and up charges from the catalog. If there is missing information this command will NOT prompt the user.

Price From Catalog

Price from Catalog will update records based on selection criteria in the active file with prices and descriptions. This button will NOT prompt for missing information.

Price From File

Price from File will update records based on selection criteria in the active file with prices and descriptions from the chosen file. This button will NOT prompt for missing information.

Another option is to **Price Lowest**. This option updates records based on selection criteria from the active file with the lowest price, including options from the catalog, and updates the descriptions.

1. Select Price/Lowest from the pull-down menu.
2. Fill in your selection requirements.
3. Press the "OK" button.

Also, view "Subtotals"

Price Line

Price Line

Price Line

Price Line will update the active record's price and description along with any option description and up charges from the catalog. If there is missing information this command will NOT prompt the user.

1. Select the record you want to update.
2. Press (F7) or select the Price Line icon.

Note- The catalog containing the parts must be Activated in the catalog manager to price.

Price From Catalog

Price from Catalog

$ Price From Catalog

Price from Catalog will update records based on selection criteria in the active file with prices and descriptions. This button will NOT prompt for missing information.

1. Select the Price from Catalog icon.
2. Fill in your selection requirements.
3. Press the "OK" button.

The price supplied from this command and others is the base price in the catalog if there are no options selected. There could be up charges or deductions when selecting options.

Note- The catalog containing the parts must be Activated in the catalog manager to price. There is a check box to add Part Descriptions when pricing. If you do not see Part Descriptions in your SIF file, please make sure this box is checked.

Price From File

Price from File

Price From File

Price from File will update the records of the current SIF with prices and descriptions from another SIF. This button will NOT prompt for missing information.

1. Select the Price from File icon.
2. Fill in your selection requirements.
3. Press the "OK" button.
4. Select the file you want to use for pricing.
5. Press the "OK" button.

This command will take the selected record(s) and look for matching records in the chosen SIF. Then it will bring over the new information from that SIF. This is commonly used for old pricing or custom furniture.

Subtotal

Inserting Subtotals

You can insert Subtotals two ways, by field or by placing them manually. The subtotal includes records between the beginning of the SIF and the designated subtotal spot, or between the most recent pre existing subtotal and the designated subtotal spot.

How to insert Subtotals manually.
How to insert Subtotals by Field.

Insert

Insert Subtotal Manually

If done manually, ProjectSpec will insert a subtotal row immediately.

      1. Select a row in your SIF file where you want the subtotal to be inserted.
      2. Access the pull-down menut Price/Subtotal/Insert. ProjectSpec will shift the selected row down one and create a new row for the subtotal.

Removing Subtotals is just as easy. Access the pull-down menu Price/Subtotal/Remove Subtotals. This will remove all of the subtotals in the active SIF file.
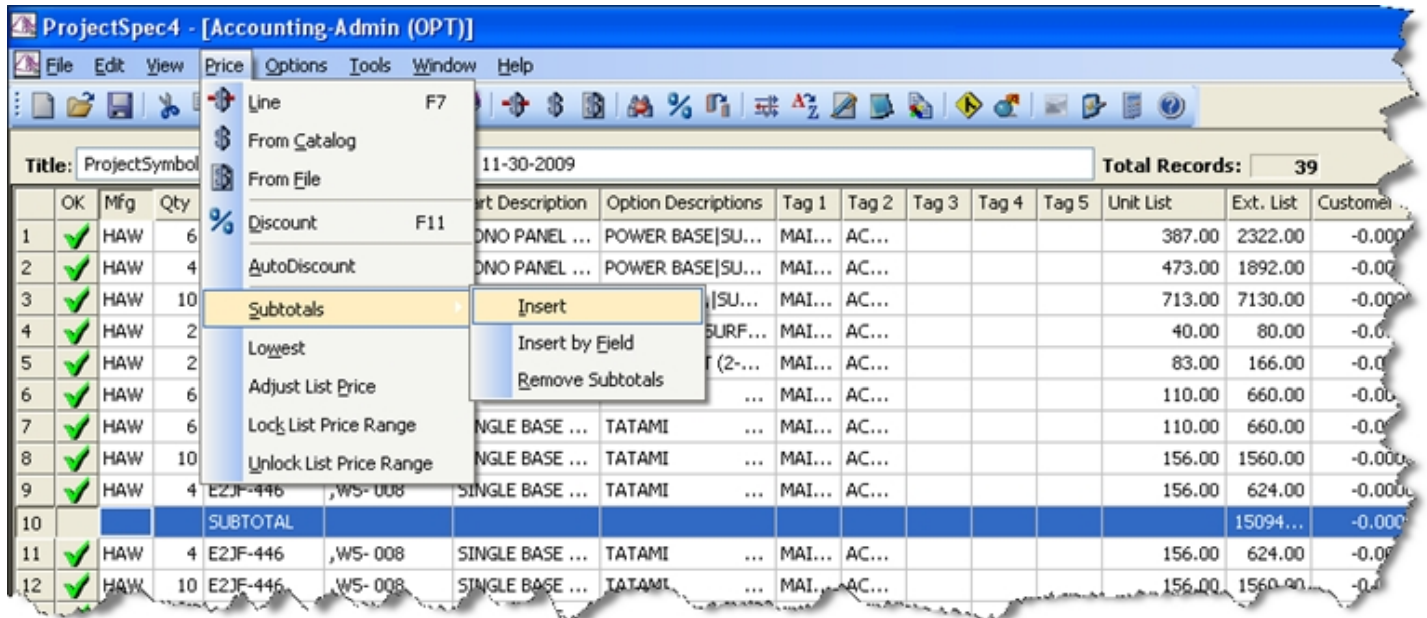
Insert by Field

Insert Subtotal by Field

If done by field ProjectSpec will sort the records by the chosen field and then insert subtotals after each unique field.

      1. Select Price/Subtotal/Insert by Field
      2. Select field to arrange Subtotals by.
      3. Press the "OK" button.

Removing Subtotals is just as easy. In the pull down menu choose Price/Subtotal/Remove Subtotals. This will remove all of the subtotals in the active SIF file.

Adjust List Price

Adjust List Price

Locking List Price

Locking List Price

Discount

Discounts

ProjectSpec allows the user to apply discounts to records. Discounts can be applied to records based on selection criteria specified by the user. To open the Discounts dialogue box, click on the Discounts icon in the toolbar , press (F11), or access the pull-down menu Price/Discount.

The Discounts dialogue box is split into two halves. The upper half defines which record(s) will be included in the discount. The lower half defines the parameters of the discount(s).

There are three different methods of applying discounts in ProjectSpec.

Click on the links below for a full description of each method.

Specific Discounting
Discount Tables
AutoDiscount
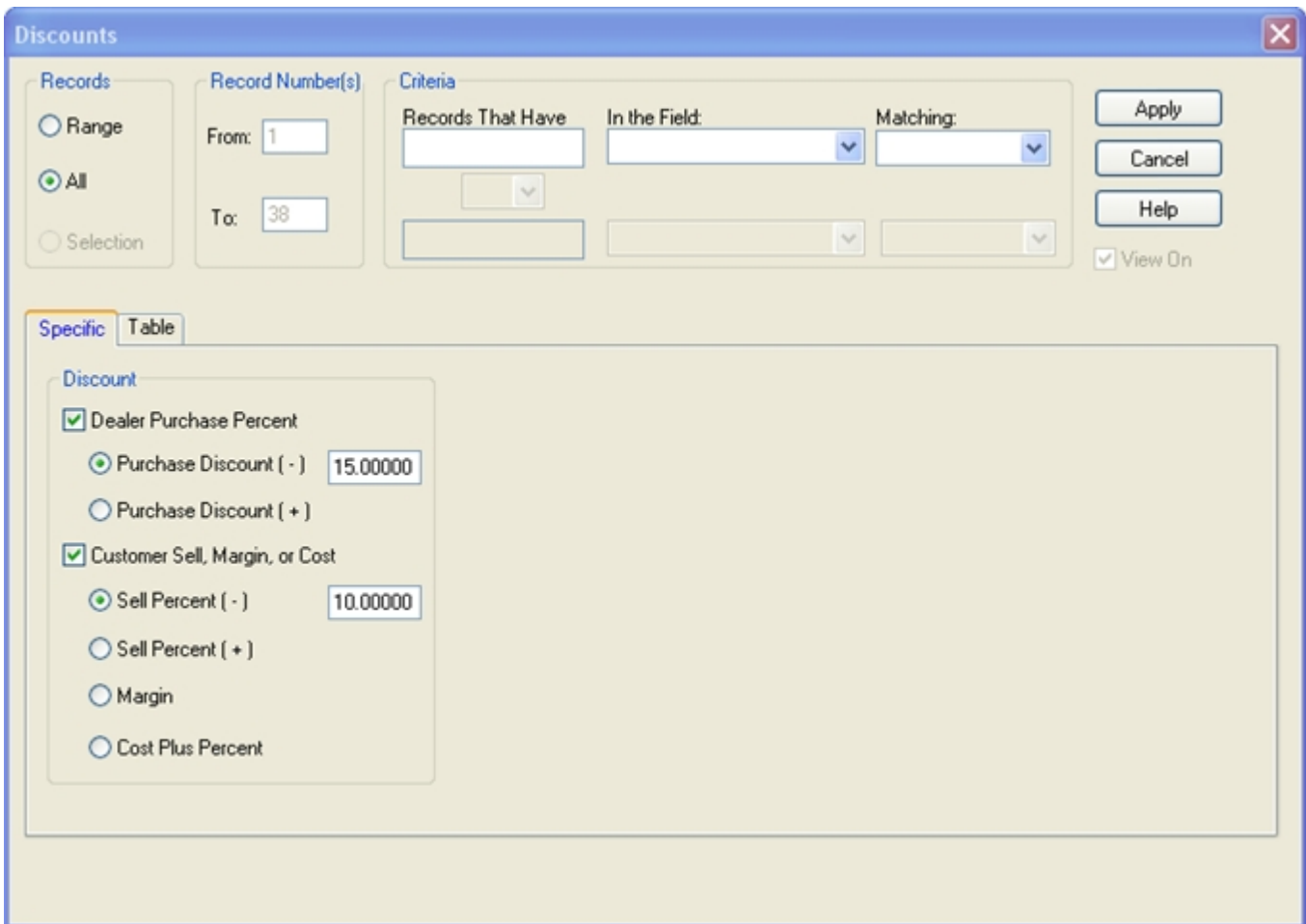
Specific

Specific Discounting

Specific Discounting allows the user to apply discounts of a certain amount to some or all of the records in a SIF.

1. Open the Discounts dialogue. Click ![%](percent icon), press (F11), or access the pull-down menu Price/Discount.

2. Fill in your selection requirements in the top half of the dialogue box.
3. Make sure the "Specific" tab is selected in the lower half of the Discounts dialogue box.
4. Select Dealer Purchase Percent.
5. Choose Purchase Discount (-) or (+). Minus will give you a lower Dealer price than List price. A positive will give you a Dealer price higher than List price.
6. Type in desired discount, this can be a tiered number (e.g. 50/10/5) or a percent (e.g. 50.55352%).
7. Choose Customer Sell, Margin, or Cost
8. Select Sell Percent (-), Sell Percent (+), Margin, or Cost Plus Percent. Minus will give you a lower Dealer price than List price. A positive will give you a Dealer price larger than List.
9. Type in desired discount, can be a tiered number (e.g. 50/10/5) or a percent (e.g. 50.55352%).
10. Press the "OK" button.
11. Repeat the Specific Discounting function until all of your discounts have been applied.
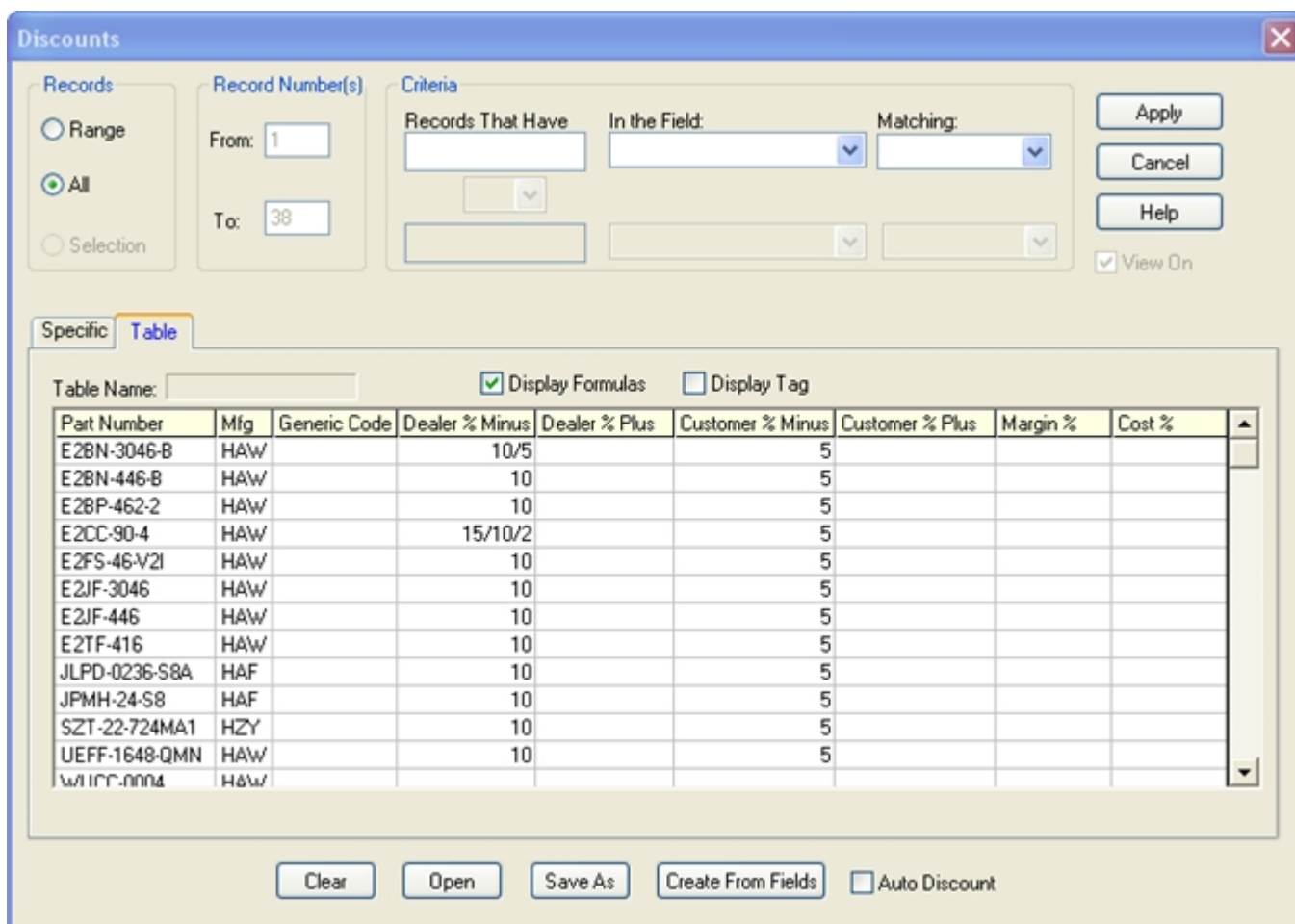
Table

Discount Table

If the user needs the same discount structure for multiple projects, ProjectSpec allows them to build a Discount Table. These tables can be saved as .Dis files and loaded again for later use. Using the Discount Table function allows you to discount a file with multiple discounts using different criteria in one easy step.

1. Open the Discounts dialogue. Click ![%] , press (F11), or access the pull-down menu Price/Discount.

2. Fill in your selection requirements in the top half of the dialogue box.
3. Make sure the "Table" tab is selected in the bottom half of the dialogue box.
4. Fill in the Discount Table that builds your structure. Discounts can be added by Part Number, Mfg code, or Generic Code. Click the "Display Tag" box to make Tags 1 through 5 available for their own discounts. The example below shows Discounts being applied by Mfg code and Part Number. The discounts are also entered in Tiered and Percentage formats.
5. If you wish, click "Save As" to save the table for later use.
6. Press the "Apply" button.

There are several buttons in the Discounts dialogue box.

Clear- clears all of the fields in the current table.

Open- allows the user to open a previously saved .Dis file.

Save As- Saves the current table as a .Dis file.

Create From Fields- Imports data from specified fields in the records of the SIF into the Discount Table. For example: if the user selects Mfg, ProjectSpec will import all of the Mfg codes in the current SIF into the Discount Table. This allows the user to populate the Discount Table quickly and accurately, without having to enter Part Numbers, Mfg codes, Generic Codes, or Tags manually. All the user has to enter manually is the amount of the discount for each item on the Table.

Auto Discount- Check this box to turn the Auto Discount function on. Click it a second time to turn it off. When Auto discount is on, any new records that the user creates will automatically have discounts applied to them according to the current Discount Table. For example, if the user creates a record with the Mfg code "GNF", ProjectSpec will automatically fill in a Dealer % (-) discount of 50/10/5 and a Customer % (-) discount of 23.5%. Auto Discount can be turned on or off at any time via the pull-down menu at Prices/AutoDiscount or by clicking on the AutoDiscount box on the Status Bar.

Apply- Applies the current Discount Table to the current SIF according to the user-defined selection protocol in the top half of the Discounts dialogue box.

Cancel- Closes the Discounts dialogue box and makes no changes to the current SIF.

Tiered

Tiered

What is a Tiered discount?

Manufacturers usually do not give specific discounts when working with dealers. Often, discounts are presented in a tiered format. For example 50/10. This means to take 50% off and then 10% off of the result. This is not an additional 10% off of the original price, but 10% off of 50% of the original price; therefore, 55% of the original. Often, with special pricing agreements, additional tiers of discounting can be added. ProjectSpec allows an unlimited number tiers in its discounting function. To add a tier, just add a (/) between each value. (e.g. 50/10/5, 50/7/5, or 50/10/7/5 etc.)

Options

Optioning a SIF

Preparing a quote or proposal for a client can be a redundant task, and it costs time and money to specify and option every record individually. ProjectSpec offers several different ways to populate your records quickly and accurately.

Click the links below for a full description of each method.

Manual Option
AutoOption
StandardOption
OptionAll
Edit Option
Clipboard Functions

Option Record

Manual Option

 What is Manual Option?

When you are selecting options from the electronic catalog ProjectSpec will prompt only for options needed for that part in the order that the manufacturer has set. Also, when you select options, ProjectSpec will update the list price with any up-charges or deductions for that part number.

To select options manually: (Figure 1)
1. Select the record you wish to update.
2. Press the Catalog Viewer button or F2.
3. Double click on the desired options from the lower box.
4. When NO more options appear in the lower box, press the "accept" button.

After selecting options, your active record should scroll to the next record allowing you to repeat steps 2 through 4 for the next record.

Selecting options will automatically prompt for any missing information in a record. (e.g. Mfg code or Qty.)

This will also fill in any information supplied from the catalog such as weight, volume or a picture.

Figure 1
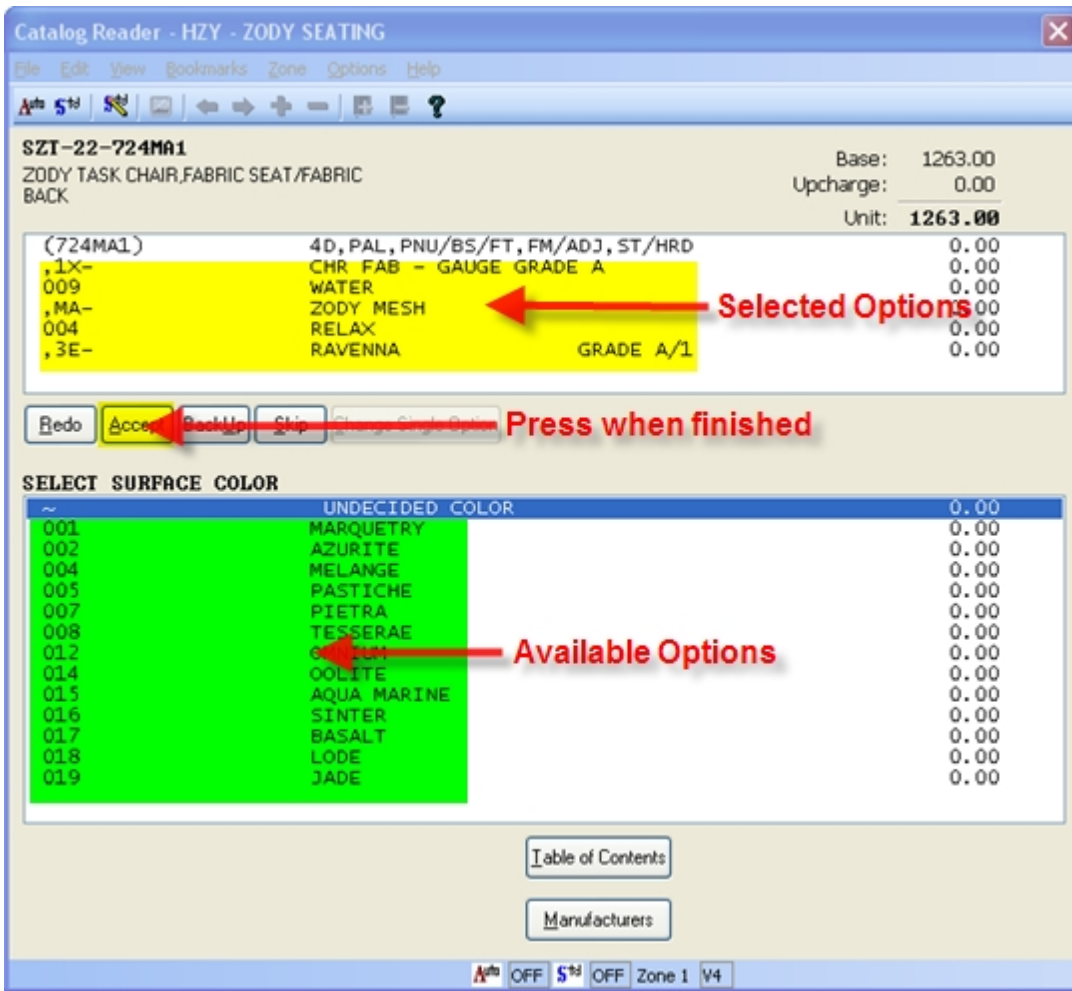
AutoOption

What is AutoOption?

AutoOption is a feature used while in the Catalog Viewer. Fabric and trim colors are often the same on a single part, even if the manufacturer allows the user to specify different colors or trims. AutoOption allows ProjectSpec to reapply your choice automatically on a single part. For example, if you select a certain color fabric, AutoOption will automatically make sure all other fabric color selections for the same part are identical. This only applies to the option selections on a single record, it is not universal for the entire project.

AutoOption can be turned on or off by selecting the word "Auto" in the status line at the bottom of the screen. It can also be found in the pull-down menu under Options/AutoOptions where it can be toggled.

Note: Many users turn AutoOption on and leave it on. If you need two different fabrics or trims on the same part, remember that AutoOption must be turned OFF.

StandardOption

StandardOption

  What is StandardOption?

StandardOption allows the user to build a table of frequently used options from which ProjectSpec can automatically option parts. This can help the user to option an entire SIF file quickly and accurately by automatically using the same options on records that contain the same Part Number, Mfg code, or Tag(s).

Note: StandardOption can also option parts according to incomplete part numbers that contain a wild-card (*) or question mark (?).

There are two parts to using StandardOption effectively: (1) turning StandardOption on, and (2) building a StandardOption table from which ProjectSpec will apply options.

(1) StandardOption can be toggled on or off by selecting the word "Std" on the status line at the bottom of the screen. It can also be toggled on and off in the drop-down menu under Options/StandardOptions.

(2) To begin building a StandardOption table, select a record and open the catalog viewer by pressing (F2). Apply options to the record if they have not already been applied. Before clicking on "Accept", follow the steps below.

A. Select an option in the top half of the Catalog Viewer that you wish to add to the StandardOption catalog. This opens a small window with 4 choices (See **Figure 1**). "Add All to StandardOptions" and "Add Selected" to Standard Options" just add the selected option or all of the options in the record to the StandardOption table. "Add all with Part Number" and "Add Selected with Part Number" add the selected option or all of the options in the record to the StandardOption table along with the part number of the record.
B. The StandardOption table will appear showing the option or options you have selected. (See **Figure 2**)
C. Repeat steps A and B until all options in the record that you need have been added to the StandardOption table.
D. Press the "Accept" button after all needed options are added.
E. If needed, select another record with options you would like to add to the table. Repeat steps A through D for that record, and any other record containing options you would like to add to the StandardOption table.

For each entry, the StandardOption table has fields for Part Number, Mfg code, and user defined Tags (See **Figure 2**). The information in these fields defines the circumstances under which StandardOption applies options to a record. StandardOption gives priority to more specific entries (i.e. the entries with more fields filled in). For example, if no fields are filled, StandardOption will apply the option to every record in the SIF file that can support the option. However, if a different entry in the table has a Mfg code filled in, all records in the SIF with that Mfg code will receive the option from that entry instead of the first. Likewise if an entry has a Part Number, Tag, or a combination of fields filled in, StandardOption will give priority to the option in this entry when it finds a record that matches the criteria.
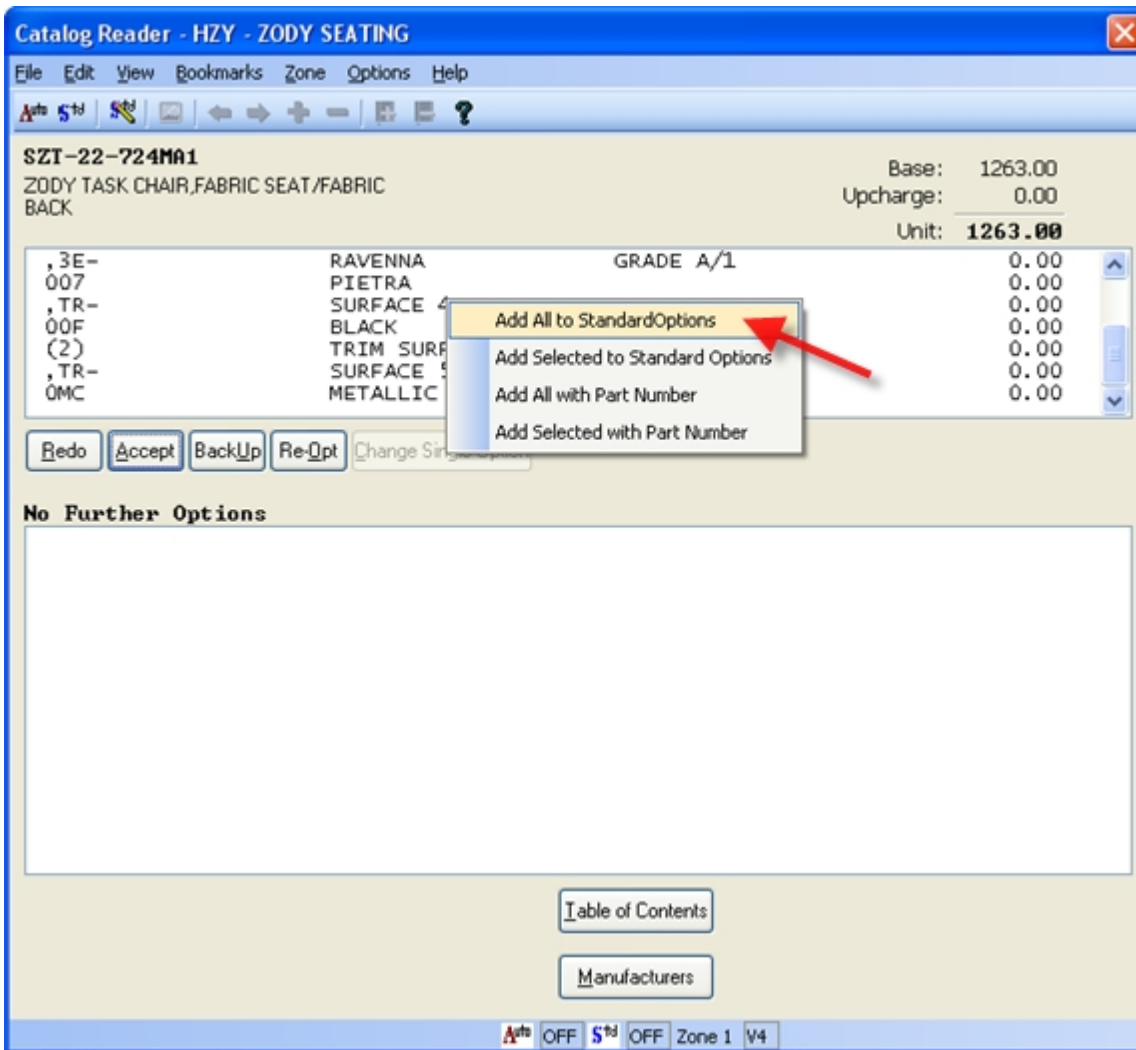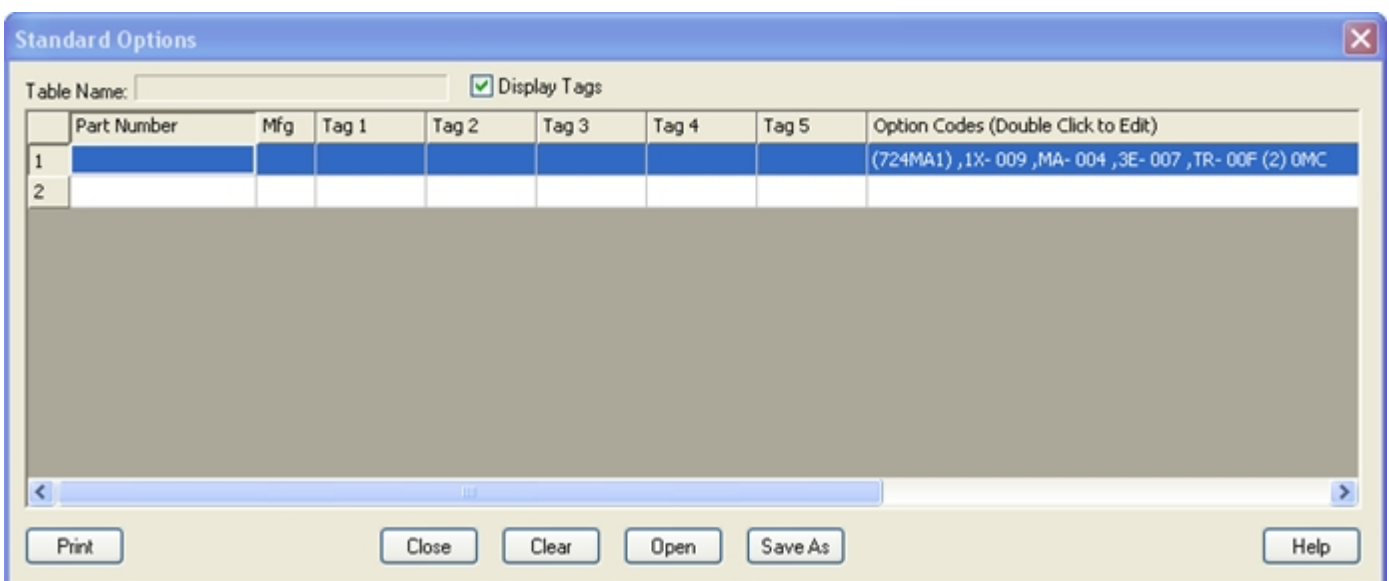
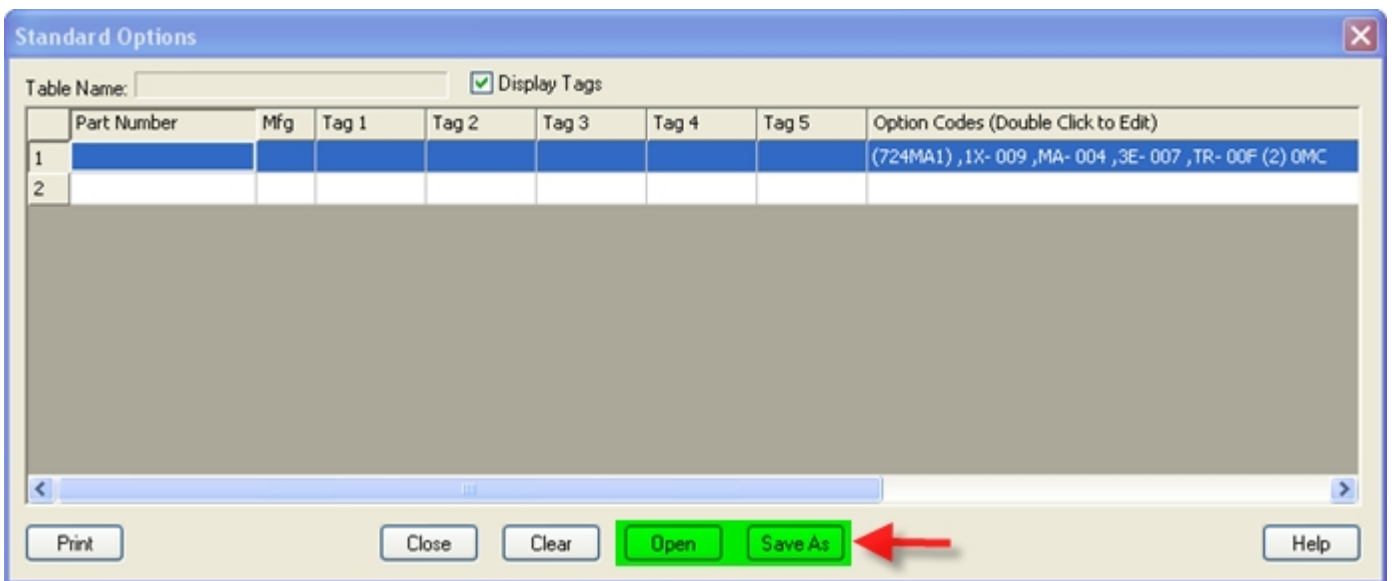**Figure 1**

Figure 2

Save/Load .SOT

StandardOption Table (.sot)

The StandardOptions table can be accessed at any time through the pull-down menu Options/Edit StardardOptions. In the table window, you can select "Open" to open a previously saved .sot file. You can also select "Save As" to save the current table as a .sot file.

Another way to create a StandardOptions table is the "Create From File" feature. This is available from the pull-down menu Options/Create Standard Options From File. This feature will annualize a SIF file and add all the options selected in that file to your StandardOptions table. This is a great way to start building StandardOptions for a client that has standard fabrics or materials.

	Part Number	Mfg	Tag 1	Tag 2	Tag 3	Tag 4	Tag 5	Option Codes (Double Click to Edit)
1								(724MA1) ,1X- 009 ,MA- 004 ,3E- 007 ,TR- 00F (2) 0MC
2								

Edit StandardOptions Table

Edit StandardOptions Table

Create Standards From File

Creating a SOT from File

Option All

OptionAll

What is OptionAll?

OptionAll automatically applies the options in your StandardOptions table to your active SIF file. It is available through the pull-down menu Options/Option All.

To option a file using OptionAll you will first need to create or open a StandardOptions table. Once a StandardOptions table is created and current, you can then run OptionAll.

1. Use the pull-down menu Option/OptionAll or press F10.
2. Fill in criteria for the records to which you want OptionAll to apply.
3. Press the "OK" button.

ProjectSpec will begin to option your selection. If OptionAll can not option a particular record completely, it will pause and allow you to select an option.

Option All Range

Records	Record Number(s)	Criteria			
○ Range	From: 1	Records That Have	In the Field: -Select One- ▾	Matching: Any Part of Text ▾	Ok
⦿ All			▾		Cancel
○ Selection	To: 38		-Select One- ▾	Any Part of Text ▾	Help

Edit Option

Edit Option

What is Edit Option?

Edit Option allows the user to edit the options of the current record manually. Edit Options is available by clicking the

Edit Options icon on the toolbar   , pressing the F5 key, double clicking in the "Option Codes" box of the record you would like to edit, or through the pull-down menu Options/Edit Options. This opens the Edit Options dialogue box.
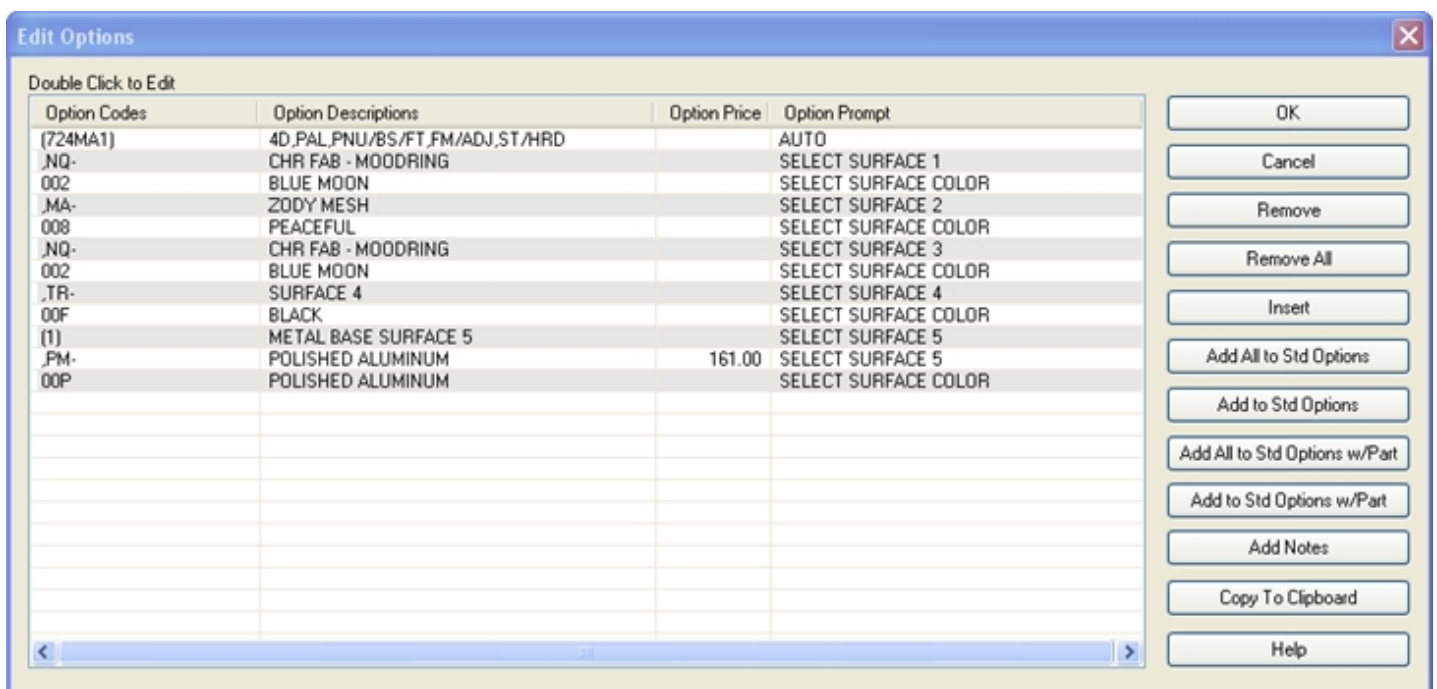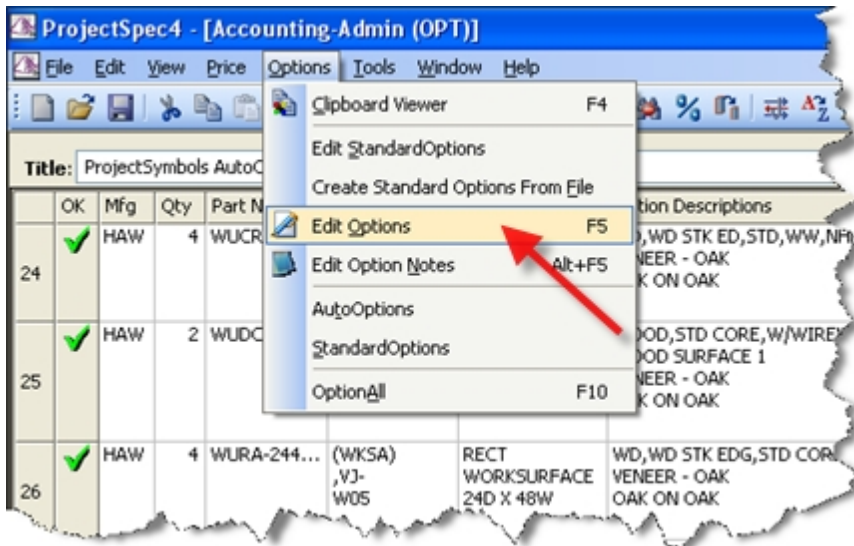
There are 11 important buttons on the right side of the Edit Options dialog.

OK - Accepts modifications and closes the Edit Options dialogue box.

Cancel - Cancels modifications and closes the Edit Options dialogue box.

Remove – Allows the user to remove one or more options from the active record. To select a single option, click on it. To select multiple options, hold down (Ctrl) and click the desired options.   To select a range of options, hold down (Shift) and click the first and last options of the range. Once the desired options are selected, click the "Remove" button to delete them from the active record.

Remove All – Allows the user to remove all options from the active record.

Insert – Adds an additional option line above the selected line in the Edit Options window. This feature is normally reserved for adding options for **Custom Parts**, or for a record that will not be filled from the catalog.

Important! - Please exercise caution when adding or inserting lines into an option field. If you are editing a standard part that will be checked against the catalog for final pricing and options, the insertion can cause the part to be priced

incorrectly, prompting an error. This error will require you to re-option the record against the catalog. The added line will then be removed from the record.

Add (All) to Standard Options (w/Part) – These 4 buttons are used to add options to the StandardOptions table. On how these are used, please refer to the page on StandardOption.

Add Notes – Allows the user to add notes to the options of the active record. Although these notes reside in the Option Codes box of the record, they do not interfere with the pricing of the record. There is no limit to the number of notes the user can add.

There are two types of notes that can be added to the Options; Attribute Notes (**AN**), and Attribute Descriptions (**AD**).

      AN- Attribute Notes occupy the Option Codes column of the Edit Options window. This field has a limit of 10 alpha-numeric characters.

      AD- Attribute Descriptions occupy the Option Descriptions column of the Edit Options window. This field has no limit to the number of alpha-numeric characters; however, only 30 can fit on a single line. Additional characters wrap to the next line. Attribute Descriptions will not split or hyphenate words. (See Examples Below)
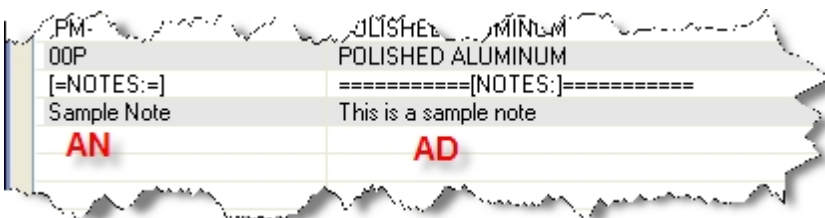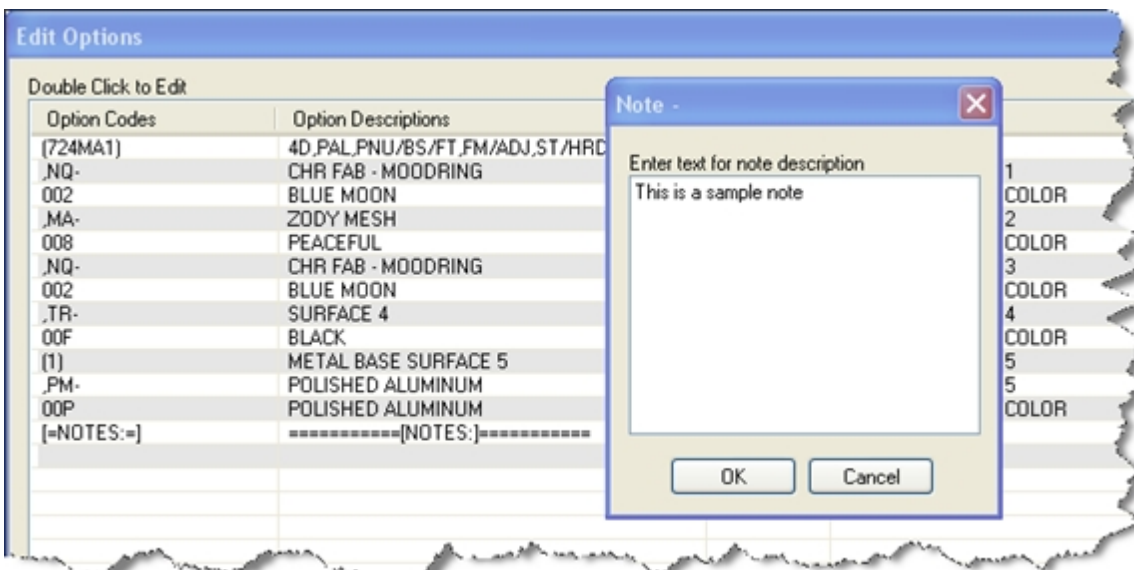
Note! You do not need to enter an AN in the left column for each AD you enter in the right column.

Edit Option Notes - This feature is available through the pull-down menu Options/Edit Option Notes or by pressing (ALT + F5). This feature allows the user to edit Notes without having the options in view. The example below shows the Edit Option Notes window.
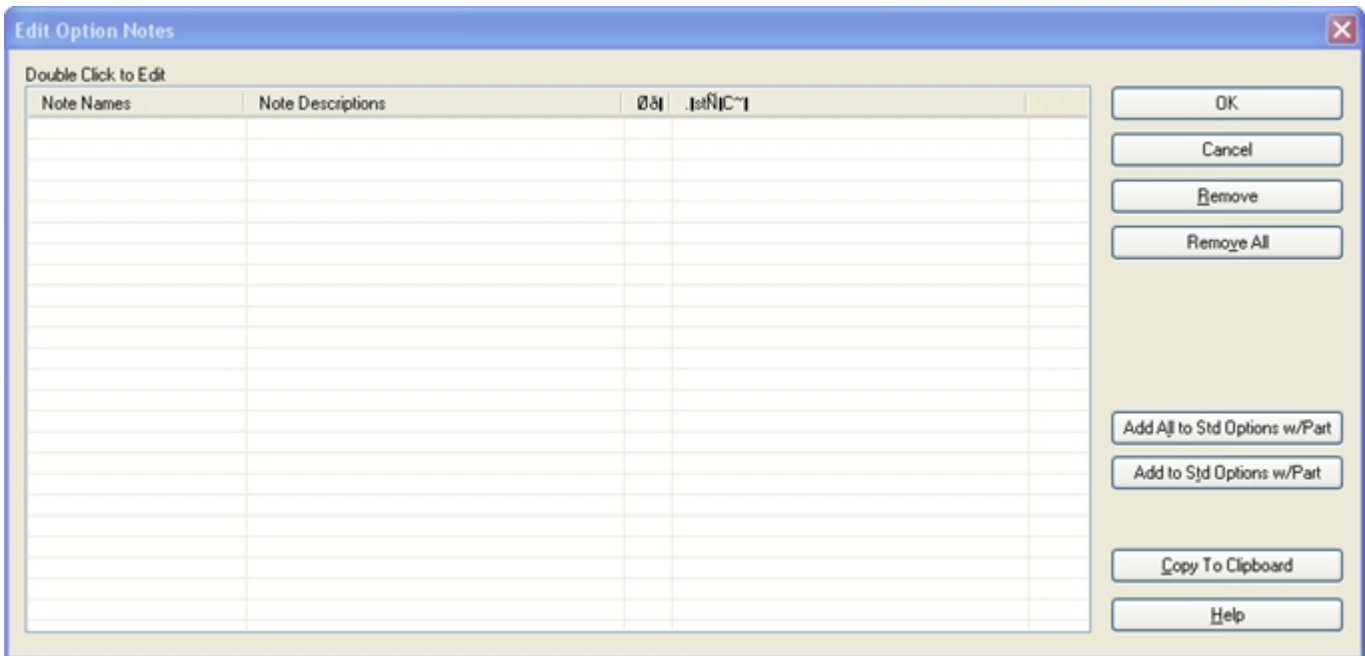
Copy to Clipboard

Copy to Clipboard copies the entire options list to the ProjectSpec clipboard. The Option Clipboard is covered here.

Clipboard Functions

Clipboard Functions

ProjectSpec has a powerful internal clipboard, as distinct from the common Windows Clipboard. Although the user is not able to paste entries from the ProjectSpec Clipboard to external applications (e.g. a Microsoft Excel file), the ProjectSpec Clipboard and its associated functions allow the user to select options for records quickly and accurately.

Click on the links below for a full description of each Clipboard Function.

Option Clipboard
Smart Copy
Field Repeat
Clipboard Function Summary

Option Clipboard

Option Clipboard

 What is the Option Clipboard?

The Option Clipboard allows the user to build a library of frequently used options. There is no limit to the number of items in each library, and the libraries can be saved to disk for later use. The Option Clipboard allows the user to create lists of the options most often used for each manufacturer or customer. This allows the user to option a SIF for them much more

quickly.

To access the Option Clipboard, click on the Option Clipboard icon in the taskbar [icon] or press (F4), this opens the Option Clipboard dialogue box.

The Option Clipboard dialogue box is divided into 2 parts. The top displays the options in the current active record. The user can choose to view the options with or without notes. To add the options/notes of the current record to the Option Clipboard, click on "Copy to Clipboard". This moves the options into the "Clipboard Items" field in the bottom half of the dialogue box. The bottom of the dialogue box displays items currently in the Option Clipboard.

The "Clipboard Items" field has 2 columns, "Item Names" and "Option Codes" The user should put information, such as a Part Number, in the "Item Names" column for easy reference.

The "Options" and "Notes" buttons in the middle of the dialogue box allow the user to view either the option codes or the notes that have been copied to the Option Clipboard.
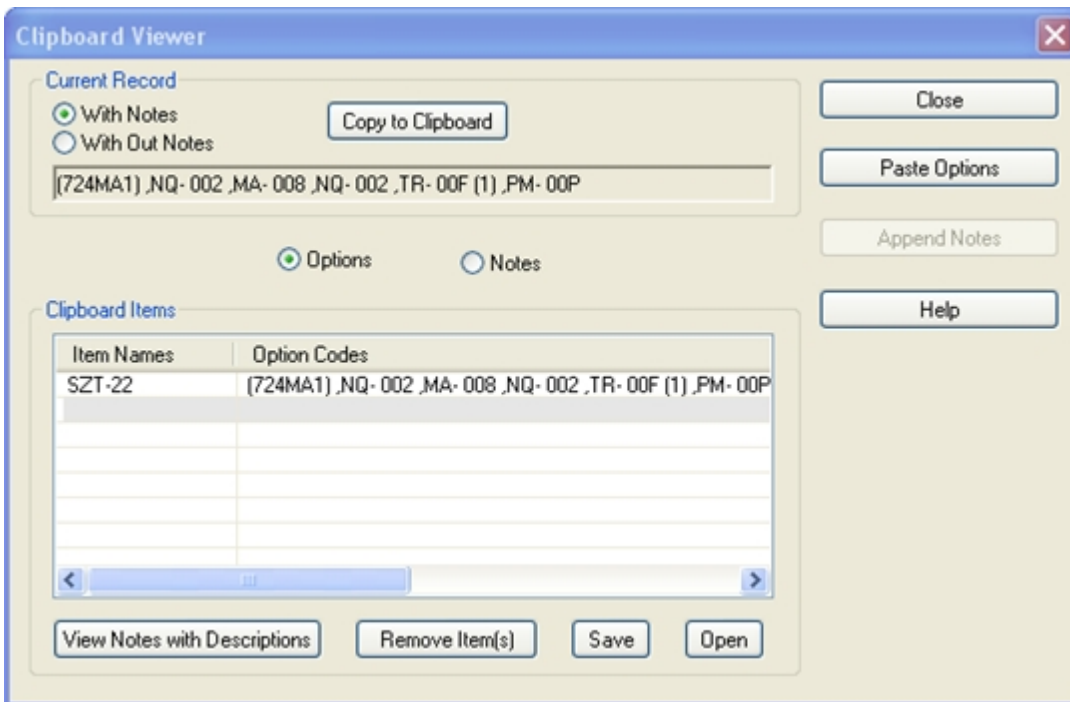
There are 4 buttons at the bottom of the Option Clipboard dialogue box.

• **View Codes with Descriptions** – Allows the user to view a set of options that has been copied to the Option Clipboard in its own "Names and Descriptions" window. This window displays the option codes and Attribute Notes in the left box, and the option descriptions and Attribute Descriptions in the right box.

• **Remove Items** – Allows the user to remove the selected entry or entries from the Option Clipboard. To select more than one entry, hold down (Ctrl) and click on each desired entry. To select a range of entries, hold down (Shift) and select the first and last entries of the range.

• **Save** – Allows the user to save all of the Clipboard Items to disk in a .cbd file for later retrieval. If a client or manufacturer usually requires the same options on their parts, the saved "Clipboard Items" file can assist the user in setting the correct options quickly.

• **Open** – Allows the user to open saved Option Clipboard (.cbd) files that have been saved to disk.

There are 3 buttons on the right side of the Option Clipboard dialogue box.

• **Close** – This button closes the Clipboard Viewer without taking any further action. All items in the Option Clipboard remain there until removed.

• **Paste Options** – Use this button to place the highlighted option string into the active record in ProjectSpec. After pasting the desired option string, the window automatically closes, and returns to the active record in ProjectSpec.

• **Append Notes** – If you used the Notes part of the Clipboard Viewer, this feature "appends" a selected note after the options of the active record in ProjectSpec.

PLEASE NOTE! – Copy to Clipboard is not the same as Ctrl + C or Edit / Copy for the Windows clipboard. If you go to a record and Edit/Copy, the active record WILL NOT paste into another program, such as Microsoft Word. The clipboard is for use inside ProjectSpec only.

PLEASE NOTE! It is possible to copy an invalid option to a record with the Option Clipboard function. This is a straight copy/paste feature, and is not like the "Smart Copy" where it validates the options. If this happens, select the record and open the Catalog Viewer by pressing (F2). This allows the user to fix the options with just a few clicks.

Smart Copy

Smart Copy

What is Smart Copy?

Smart Copy tries to option the current record based on the options selected in previous records with the same or similar Part Number.

To use Smart Copy, press (Shift+F4). This function is especially useful if you have several parts from the same manufacturer that all require the same options. Smart Copy will look at all of the similar Part Numbers in the SIF and apply the options that appear in them to the current record if possible.

Note- Smart Copy works best when the manufacturer uses an alpha-numeric part nomenclature where the prefix of the part is an abbreviation for the part type and the suffix describes the dimensions of the part. Smart Option may not work with part numbers that follow some sort of designated prefix-suffix model.

When a Part Number, or partial Part Number, has been entered into the active record, and you want to use Smart Copy, press (Shift+F4). When a match is found a dialog box opens prompting you to use the options, continue the search, cancel the search, or view the found options and descriptions.

Field Repeat

Field Repeat

What is Field Repeat?

Field Repeat allows the user to to copy the information in a field in one record to the same field in a different record. Although Field Repeat works for any field that is visible in Classic View, this function is particularly useful if a SIF file has several records that all need the same options.

To use the Field Repeat function, click on the field you would like to copy *from*, then click on the field you would like to copy *to*. Now, press (F3). The information should now be copied from the first field to the second.

Note- The record you are copying *from* and the record you are copying *to* do not need to be next to each other, nor do they have to be in order. The user can copy from a field in one record to the same field in any other record.

The Field Repeat function accomplishes the same thing the user could do with Cut and Paste; however, Field Repeat requires fewer keystrokes.

| Rec# 39 | Mfg HAW | Qty 1 | Part Number HCCP-0024-F4 | Tag 1 | Click here | Unit List 170.00 | Extended 170.00 | Weight 0.00 | Extended 0.00 |
| | | | | Tag 2 | | | | | |

Part Description: VARIABLE HGT CABLE MANAGEMENT 24 INCHES — Tag 3 — Volume 0.00 — Extended 0.00

Option Codes: (F4),C2-0AC,TR-0AK — Tag 4, Tag 5 — then — Zone 1 — Taxable ☑

| Rec# 40 | Mfg | Qty | Part Number HCCP-0024-F4 | Tag 1 | Click here and press (F3) | Unit List 0.00 | Extended 0.00 | Weight 0.00 | Extended 0.00 |

Part Description — Tag 2, Tag 3 — Volume 0.00 — Extended 0.00

Option Codes — Tag 4, Tag 5 — Zone — Taxable ☑

Clipboard Summary

Clipboard Summary

ProjectSpec provides three clipboard functions for the user to help them populate their records quickly and accurately. Each method is more or less effective in different situations, so it would be useful to be aware of the capabilities of each. The chart below organizes the three functions (Option Clipboard, Smart Copy, and Field Repeat), and explains exactly what each one does. Below the table are some frequently asked questions about the three clipboard functions.

Command	Key	Description
Field Copy	**F3**	- Use when the record you are editing is the same part type as the last record edited, regardless of location. - Field Copy will copy and place the option from the last record edited. - Use in place of Option Clipboard when the last record edited before the current record is the same part type. (Only to save keystrokes) - Only copies Option Codes, not descriptions.
Smart Copy	**Shift + F4**	- Use when the record you are editing has a similar part in the proposal that was previously entered. - Smart Copy does not have to be the last part edited. - Smart Copy does not have to be in any particular order. - Use in place of Option Clipboard when your proposal already has similar part types as the current record being edited. (Only to save keystrokes) - Only copies Option Codes, not descriptions.
Option Clipboard	**F4**	- Much more powerful than either Field Copy or Smart Copy. - Allows user to Save/Load option string combinations for client standards programs. - Stores multiple Option Strings - Allows Option Naming or Tagging. - Allows user to save / store Option Notes. - Only stores Option Codes, but allows user to view option descriptions. - Use Option Clipboard if you are unsure of which option string to use and you have tagged or named the option strings in Option Clipboard.

Figure 2 - Option Commands Usage Table

Frequently Asked Questions:

How do I Load/Save different option strings and why would I do that?
The mechanics of operating the Option Clipboard are covered here. In a standards program, a customer generally has a standard color for panels, work surfaces, binder bins, etc. Unfortunately, each part has a unique option string to represent the same color scheme. The Option Clipboard can store all of these strings in a file that can be loaded later when the same set of Option Codes are needed. This prevents the user from having to select the options for each unique part manually the next time they are populating a SIF for the same customer.

But how is Option Clipboard different from Field Repeat or Smart Copy?
The Option Clipboard can store several option strings for future use. Field Repeat only pastes the most recent previously entered value; Smart Copy, on the other hand, scans the entire SIF file for similar part numbers and tries to apply the options from those parts to the active record. It should be noted that the user can use either Field Repeat (F3) or Smart Copy (Shift+F4) to populate a record, and *then* copy the new option string to the Option Clipboard (F4).

I am not sure why I would use Option Clipboard and not Field Repeat or Smart Copy?
You can use them all to create your proposal. Field Repeat is the fastest Clipboard Function, especially if you are copying

an Option Code from one record to the next. Smart Copy is particularly effective if you are trying to option a part for the first time in that SIF, but you have already finished selecting options for parts with similar Part Numbers. The Option Clipboard holds an infinite number of Option Codes organized according to the user's specifications. Although it may not be as fast as either the Field Repeat or Smart Copy functions, the Option Clipboard gives the user a high element of control, which in turn leads to increased accuracy.

Unique Manufacturer Codes

ProjectSpec has 4 reserved manufacturer (Mfg) codes that are used to add special charges to a record. Once you enter one of these codes, open the Catalog Viewer by pressing (F2). Each of the 4 Unique Manufacturer Codes has its own dialogue box in the Catalog Viewer. To learn more about each code, click the following links:

> Added Charges (CHG)
>
> Specials (SPC)
>
> Inquiries (INQ)
>
> Customer's Own Material (COM)

Added Charges

Added Charges

The Mfg code (CHG) is used to communicate miscellaneous charges within ProjectSpec. These charges can include the customer's own fabric, installation, or other service fees that need tax calculated. To view the Added Charges dialogue window:

1. Enter (CHG) in the Mfg field of the current record.

2. Open the Catalog Viewer by pressing (F2).

There are several fields in the Added Charges dialogue.

Qty – Represents the quantity required for this charge.

Part Number: - Part number used to select appropriate options and generate default description.

Part Description: - Description of the Part Number. This can be modified to reflect specifics of this special charge

List Price – Unit price for this charge.

Special Charge – Description for this charge

The Bill Type determines who will collect the charge.

Dealer – Dealer will collect this charge.

Direct – Manufacturer will collect this charge.

<u>There are four important buttons on the bottom of the Added Charges dialogue box.</u>

OK- Accepts the information in the dialogue box and applies it to the current record. The Bill Type will be added as an Option Description and the new Part Description, if you have altered it, will replace the old one.

Cancel- Closes the dialogue box and does not make any changes to the current record.

Add- Prompts the user to add a name to this Added Charge. This will appear in the Special Charge field in the Added Charges dialogue.

Delete- Deletes the selected entry in the Special Charge field.

When an added charge has been applied to the current record successfully, the status icon will change to a .

Specials

The Mfg code (SPC) is used to communicate "specials" within ProjectSpec.

Note- Most manufacturers refer to these as "standard specials", which means the requirements can be communicated without a drawing.

To view the Specials dialogue window:

---

1. Enter (SPC) in the Mfg field of the current record.

2. Open the Catalog Viewer by pressing (F2).

There are three sections in the Specials dialogue, each with their own fields.

---Info---

Specials # - A unique number issued by the manufacturer for the special.

List Price – Quoted by the manufacturer.

Qty – Quantity required of this part number.

---Equivalency Code---

Part Number – The Part Number of a similar part in the manufacturer's catalog. This is used so that appropriate options can be specified for the piece that is included in the "Special".

Mfg – Manufacturer code for the Part Number.

[Options] – This button opens the Catalog Viewer for the part referenced in the Equivalency Code section. This allows options to be specified for the part.

Codes and **Descriptions-** These buttons determine whether Option Codes or Option Descriptions are displayed in the box just below them.

---Part Description---

Description of the equivalent Part Number. This can be modified to reflect specifics of this special part.

OK- This applies the information in the Specials dialogue to the current record. The data in the Specials # box will replace the Part Number, and the data in the Part Description field will replace the data in the Part Description field of the active record. The Option Codes of the part specified in the Equivalency Code section will appear in the Option Codes box, while the Part Number and Mfg code of the part specified in the Equivalency Code box will appear in the Option Descriptions field.

Cancel- Closes the dialogue box and does not make any changes to the current record.

When a special has been applied to the current record successfully, the status icon will change to a .

33	✓	HAW	8	ZEBD-1600-PP	(PP)	CNTLVR BRKT,UNIGRO...	PAINTED,PAIR		MAI...	AC...		80.00	640
34	🚩	SPC	7	HAW-SPEC-01	(PP) [=NOTES:=]	New Special Part	PAINTED,PAIR ===========[NOTES:]=========== EQUIVALENCY CODES: PARTNUM = ZEBD-1600-PP MFG CODE = HAW		MAI...	AC...		92.50	647.5
35													

| Rec# 34 | Mfg SPC | Qty 7 | Part Number HAW-SPEC-01 | Tag 1 MAIN OFFICE | Unit List 92.50 | Extended 647.50 | Weight 0.00 | Extended 0.00 |

Part Description
New Special Part

Tag 2 ACCOUNTING/ADMIN

Tag 3

| | | Volume | Extended |
| | | 0.00 | 0.00 |

Option Codes
PAINTED,PAIR
===========[NOTES:]===========

Tag 4

Tag 5

Zone 1 Taxable ☑

List $ 59013.50 | Customer $ | Dealer $ | Margin $ | AutoDiscount: OFF | Aᵇ ON | Sᵗ ON | NUM

Inquiries

Inquiries

The Mfg code (inq) is used to communicate "inquiries" within ProjectSpec.

Note- Most manufacturers refer to these as "special specials", which means the requirements cannot be communicated without a reference drawing. Many manufacturers will issue a confirming Inquiry Number with a referencing Line Item.

To view the Inquiry dialogue window:

1. Enter (INQ) in the Mfg field of the current record.
2. Open the Catalog Viewer by pressing (F2).

There are three sections in the Inquiry dialogue, each with their own fields.

---Info---

Inquiry # - A unique number issued by the manufacturer.
Line – A specific line item in the Inquiry for this part. This is issued by the manufacturer.
List Price – Quoted by the manufacturer.
Qty – Quantity required of this part number

---Equivalency Code---

Part Number – The Part Number of a similar part in the manufacturer's catalog. This is used so that appropriate options can be specified for the piece that is included in the "Inquiry".

Mfg – Manufacturer code for the Part Number.

[Options] – This button opens the Catalog Viewer for the part referenced in the Equivalency Code section. This allows options to be specified for the part.

Codes and **Descriptions**- These buttons determine whether Option Codes or Option Descriptions are displayed in the box just below them.

---Part Description---

Description of the equivalent Part Number. This can be modified to reflect the specifics of the part in the "Inquiry".

OK- This applies the information in the Inquiry dialogue to the current record. The data in the Part Description field will replace the data in the Part Description field of the active record. The Option Codes of the part specified in the Equivalency Code section will appear in the Option Codes box, while the Part Number, Mfg code, Inquiry #, and Line # all will appear in the Option Descriptions field.

Cancel- Closes the dialogue box and does not make any changes to the current record.

When an inquiry has been applied to the current record successfully, the status icon will change to a .

COM

COM

The Mfg code (COM) is used to communicate a "customer's own material" within ProjectSpec.

Note- Most manufacturers have a specific format required to communicate a COM request. This dialog box is supplied as a guide only. The COM dialog is usually launched after a part has been specified with the appropriate grade of fabric for that manufacturer. The selected fabric and color is then converted to a COM.

To view the Inquiry dialogue window:

1. Enter (com) in the Mfg field of the current record.

2. Open the Catalog Viewer by pressing (F2).

There are three sections in the COM dialogue, each with their own fields.

---Info---

Part Number – Imported from the active record.

Qty – Imported from the active record.

List Price – Imported from the active record.

---Part Description---

Imported from the active record. The user can modify this to reflect the changes to the part.

---Material---

Supplied by: The manufacturer usually acquires COM. If not, select "Other" and input who will provide the material.

COM Manufacturer – Manufacturer of the COM.

Yards – Number of yards required for each Part Number.

Test/Approval Number – Usually supplied by the manufacturer.

Price Per Yard – Cost per yard of material.

---Catalog Options---

This section is used to apply options to the part (if they have not already been applied), and to specify which options will be replaced by the COM.

Mfg – Enter the Mfg code for the part here.

[Select Options] – This button opens the Catalog Viewer, allowing the user to option the part manually.

Material Code – This is supplied by the manufacturer as part of the test/approval process.

Material Description – This is automatically filled in by the program when a Material Code is entered.

Color Code - This is supplied by the manufacturer as part of the test/approval process.

Color Description - This is automatically filled in by the program when a Color Code is entered.

[<<Apply to Current Selection] – This will replace the highlighted fabric and color pair in the options box with the Material and Color pair listed in the input boxes on the right. In this example, the ",WC-" option would be replaced by "ABC" and the "0RW" option would be replaced by "123".

OK- This applies the information in the COM dialogue to the current record. The codes for the COM material and color will appear in the Option Codes box. The Supplier, Approval #, COM Manufacturer, and # of Yards will all appear as Option Descriptions.

Cancel- Closes the dialogue box and does not make any changes to the current record.

When an inquiry has been applied to the current record successfully, the status icon will change to a   .

31	✓		...00-PR		BRACKET UNIGROUP/T...			AC...	
32	🚩	COM	2	WUDC-5030-WKSA	(WKSA) (1) ,ABC- 123 [=NOTES:=]	CONFERENCE END WORKSURFACE 50 X 30	WOOD,STD CORE,W/WIREWAY WOOD SURFACE 1 Customers Own Material Color Code ===========[NOTES:]=========== SUPPLIER = MANUFACTURER APPROVAL # = 5555555 COM MFG = ABSTERGO YARDS = 10	MAI...	AC...	1481.00

Rec#	Mfg	Qty	Part Number		
32	COM	2	WUDC-5030-WKSA		

Part Description
CONFERENCE END WORKSURFACE 50 X 30

Option Codes
WOOD,STD CORE,W/WIREWAY
WOOD SURFACE 1

Tag 1 MAIN OFFICE
Tag 2 ACCOUNTING/ADMIN
Tag 3
Tag 4
Tag 5

	Unit List	Extended	Weight	Extended
	1481.00	2962.00	0.00	0.00
			Volume	Extended
			0.00	0.00

Zone 1   Taxable ☑

| List $ | 60658.00 | Customer $ | | Dealer $ | | Margin $ | | AutoDiscount: | OFF | Aᴬᵇ ON | Sᵗᵈ ON | | NUM |

Merge

Merging SIF Files

The Merge function inserts a reference to another existing SIF into the current SIF. The merged SIF file occupies a single record in the current SIF. This is a great way to show your client how much a particular area is going to cost without having to show all the components that make up the area. For ease of use, all SIF files to be merged should be in the same folder on the hard drive. SIF files can be merged into the active SIF file at any time.

How to use the Merge function.

Expand Merge extracts all the data of the merged SIF file and imports it into the current SIF. The net effect is essentially to import all of the records from a SIF on the hard drive to the current SIF.

How to use the Expand Merge function.

Merge

Merge

The Merge function inserts a reference to another SIF file into the active SIF.

To merge a SIF into the current SIF:

1. Click on the Merge icon   , press (F9), or assess the pull-down menu Edit/Merge.
2. Select the SIF file you want to merge.
3. Press the "Open" button.
4. Enter the quantity. The quantity essentially acts as a multiplier for the imported data. The total value of the imported SIF will be multiplied by the number the user enters here.
5. Click "OK".

The icon in the OK field shows that this record is in fact a merged SIF. The part Number field contains the abbreviated file name of the .SIF file. The Part Description field contains the title of the merged SIF. The unit List field displays the cost of the merged SIF, whereas the Ext. List field shows the cost of the merged SIF multiplied by the quantity set by the user.

Note- The full file name of the merged SIF appears only in spreadsheet view, in the Long File Name field.

Expand Merge

Expand Merge

Expand Merge copies the records of a SIF file on the hard drive into the current SIF. The quantities of each record that is imported will be multiplied by the quantity specified by the user during the initial Merge function.

To expand a merged SIF:

    1. Click the Expand Merge icon , press (F8), or access the pull-down menu Edit/Expand Merge.
    2. Fill in your selection requirements (See Figure 1). ProjectSpec will expand merged SIF files based on these parameters. This window is useful if there are several merged SIF files in the current SIF, and the user does not wish to expand all of them.
    3. Press the "OK" button.
    4. Specify if you would like to make all records taxable (See Figure 2).

Figure 1
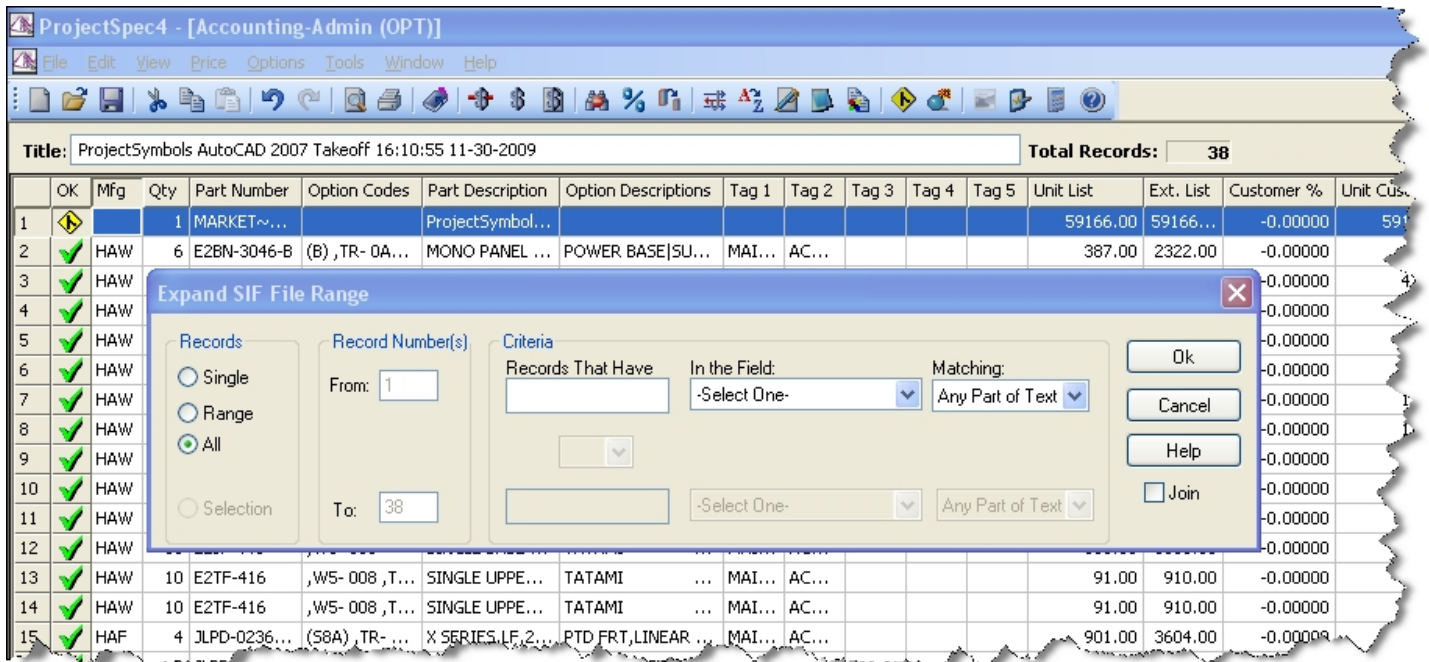
Figure 2
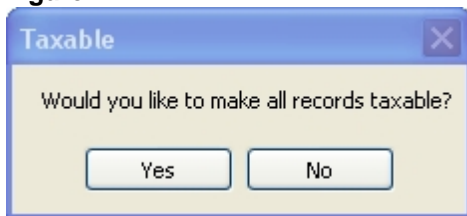
Below is an example of what happens when the user expands a merged SIF.

1. Another SIF has been Merged into this one. Note that the Unit List field displays the value of the Merged SIF. Also note the total number of Records in this SIF.
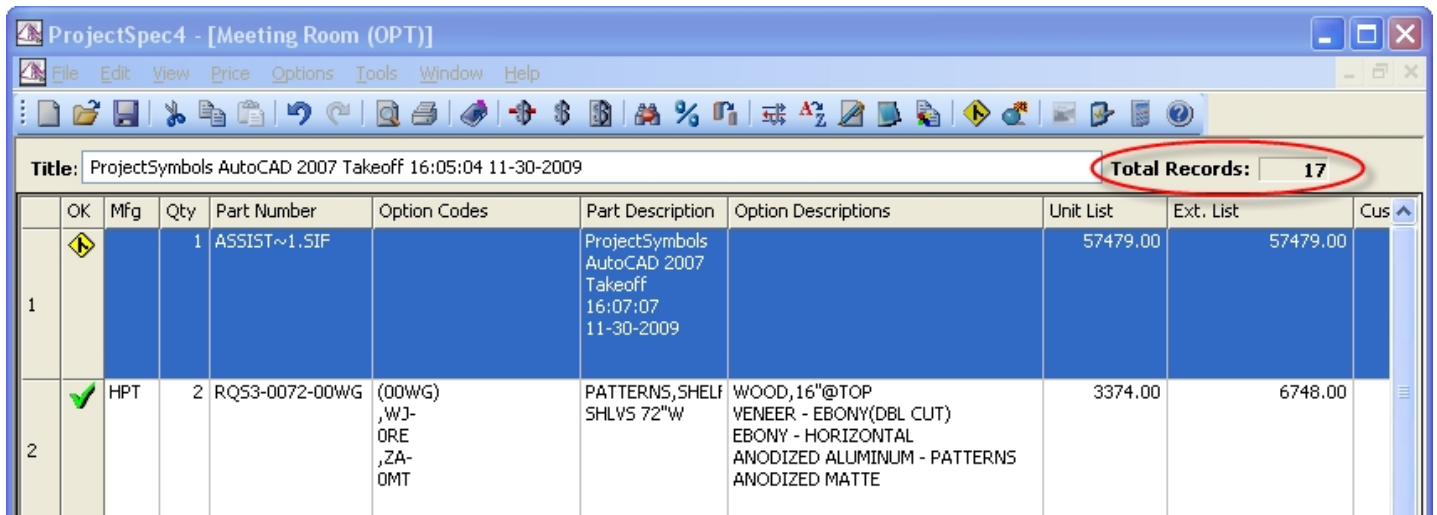
2.) The Merged SIF has been expanded, importing all of the records of the Merged SIF into this SIF. Note the increase in the number of Total Records.

Search File Directory

Search File Directory

When the user wants to Merge a SIF file and/or Expand a Merged file, ProjectSpec looks for SIF files in the Search File Directory, a user defined set of folders on the hard drive.

If you use the browse function to find a SIF you may be prompted to add that location to the Search File Directory. It is recommended that you select yes if you may be Merging more files from that location later.
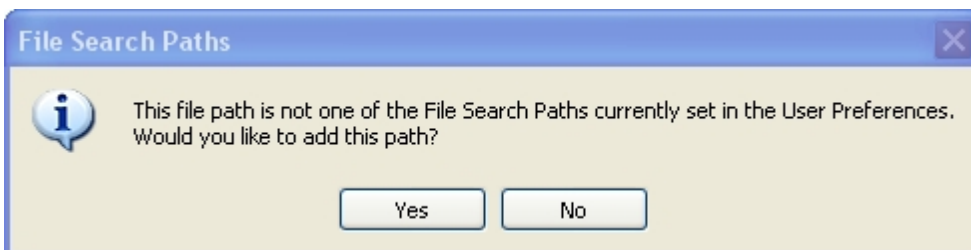
If multiple files with the same name exist in multiple Search File Directory paths, the expand merge command will expand the first file it comes across.

You can also add to the Search File Directory at any time by accessing the File Paths tab in the Preferences dialogue box. The Preferences dialogue can be accessed through the pull-down menu Tools/Preferences.
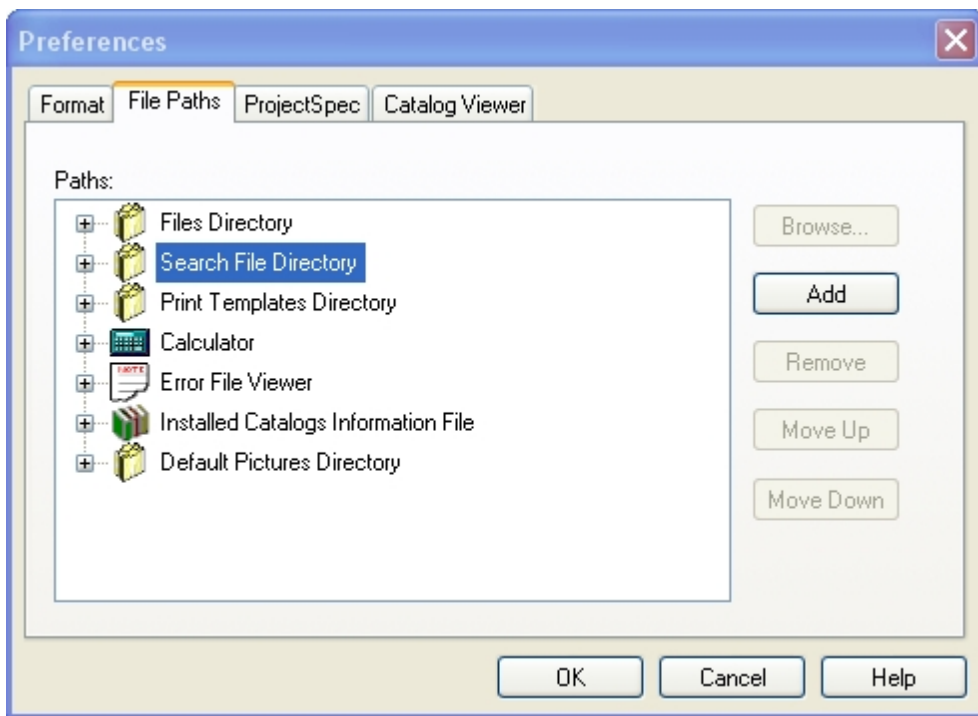
Part Picture Association

Part Picture Association

ProjectSpec is able to associate pictures with parts that appear in your SIF. These pictures are visible in the Classic View of ProjectSpec as well as on printed reports.

Example of records with associated pictures:
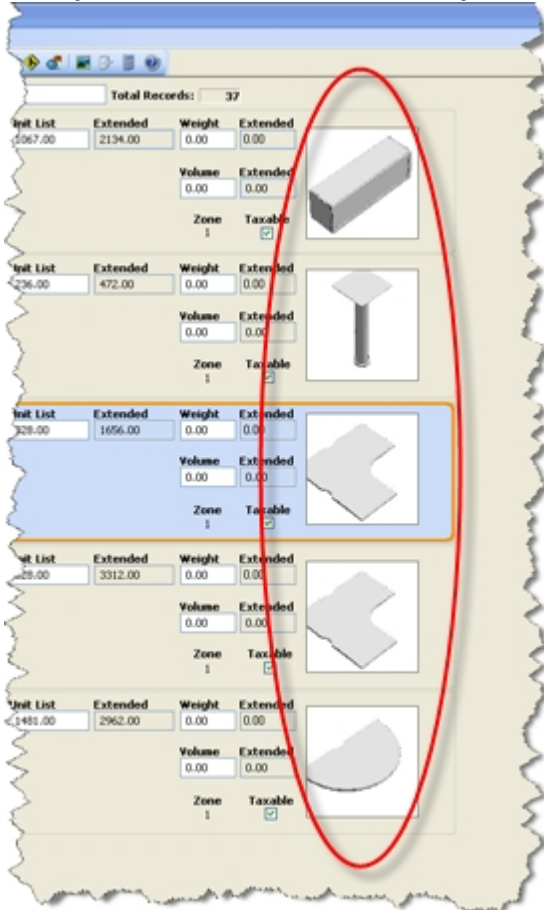
Click on the links below to learn more about:

> Editing Pictures
> Clearing Pictures from Parts
> Association Table

Edit Picture

Edit Picture

The Edit Picture function of ProjectSpec allows the user to associate a picture with a record manually. To access the Edit Picture function, view the drop-down menu Edit/Picture/Edit, or right-click on the picture in the record you want to edit and click on "Edit". If there is no picture associated with the record yet, a ProjectMatrix logo will be displayed.

Note- you must be in [Classic View](#).
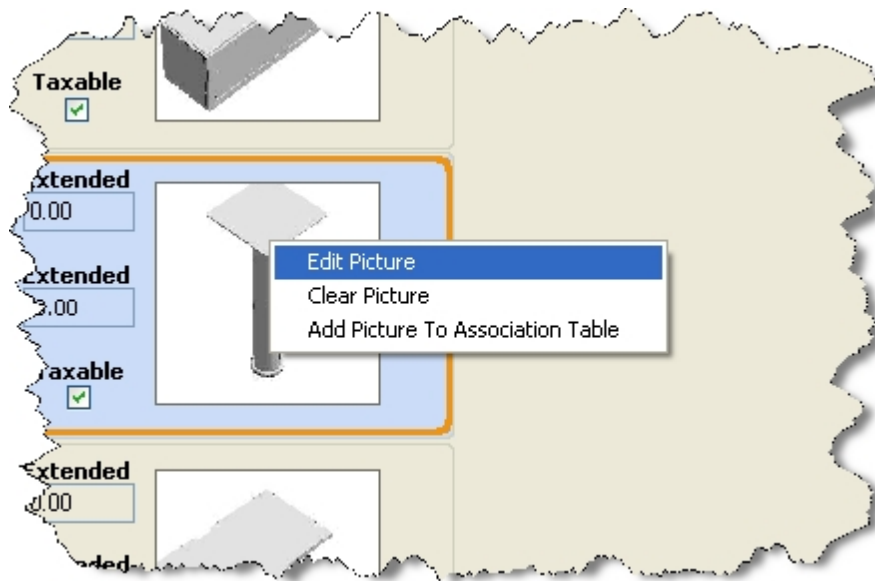
This opens a **Select Picture** dialogue box. Navigate to the picture you would like to associate with the active record. Note the image preview to the right of the navigation window. When you have found the image you want, click on "Open". To abort the procedure, and leave the picture unchanged, click on "Cancel".
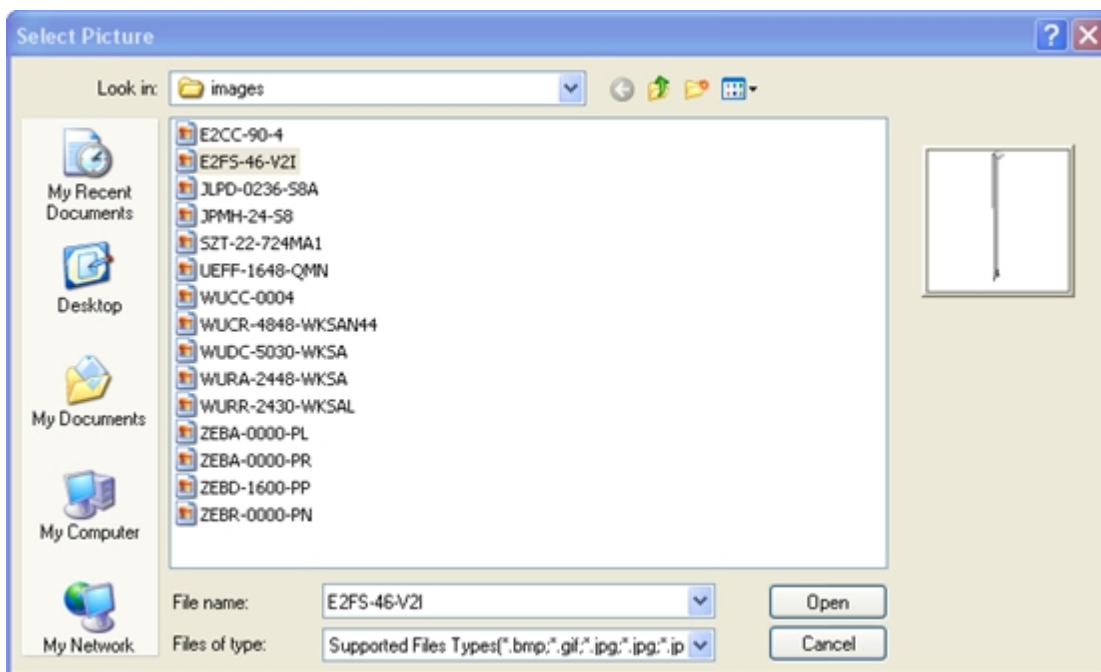
Clear Picture

Clear Picture

ProjectSpec allows the user to remove the picture associated with an image manually. To do so, you can either access the drop-down menu Edit/Picture/Clear, or right-click on the picture you wish to remove and select "Clear Picture".
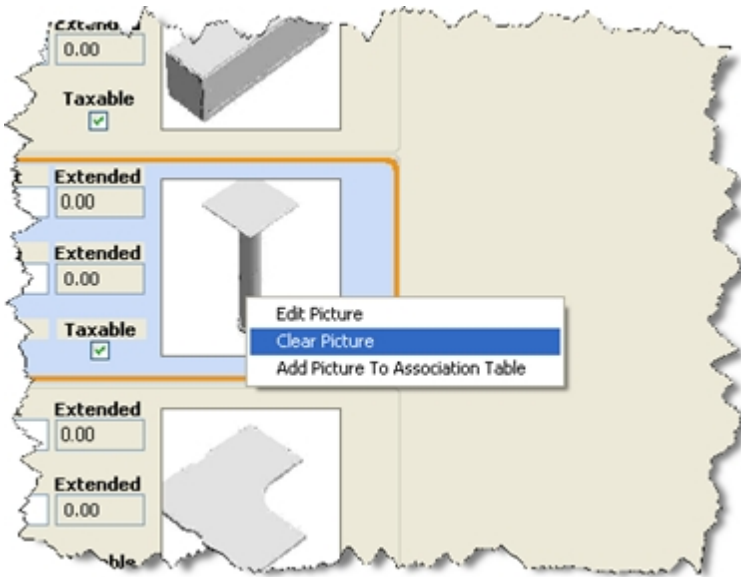
It is also possible to clear every picture from the SIF file. To do so, access the drop-down menu Edit/Picture/Clear All.

Add to Association Table

Part Picture Association Table

ProjectSpec allows the user to build a table that associates pictures with records according to user specified parameters. This allows the user to add pictures to the records of their project quickly and accurately. The Part Picture Association Table can be accessed through the drop-down menu Edit/Picture/Part Picture Association.

The Part Picture Association dialogue box is split into upper and lower halves: The lower half holds a the table of Part Picture Associations, the top half allows the user to specify to which records they want the Associations to apply.

Lower Half:
The lower half of the dialogue box contains the table itself. Each column in the table can be edited by the user. This allows ProjectSpec to associate an image with a Part Number, Mfg code, user defined Tag, or any combination thereof. In most respects, the Picture Association table operates in the same way as the Standard Options Table.

After the fields in the table are filled out, double-click in the "Part Picture Location" field to open a **Select Picture** dialog. Note the image preview to the right of the navigation window. Browse to the image you want then click "Open" to add it to the table, or "Cancel" to close the browse dialog and return to the Part Picture Table. Note that there is a small Image Preview box above the table.

Note- The user can enter Wildcards in the part number field of the table. This will apply the image to any record containing the correct portion of a Part Number.

There are three buttons in the lower half of the Part Picture Association dialog.

Clear- Clears all fields, leaving them blank.

Open- Opens a table that has been saved to the hard drive.

Save As- Saves the current table as a .Pxr file, to be opened again later.
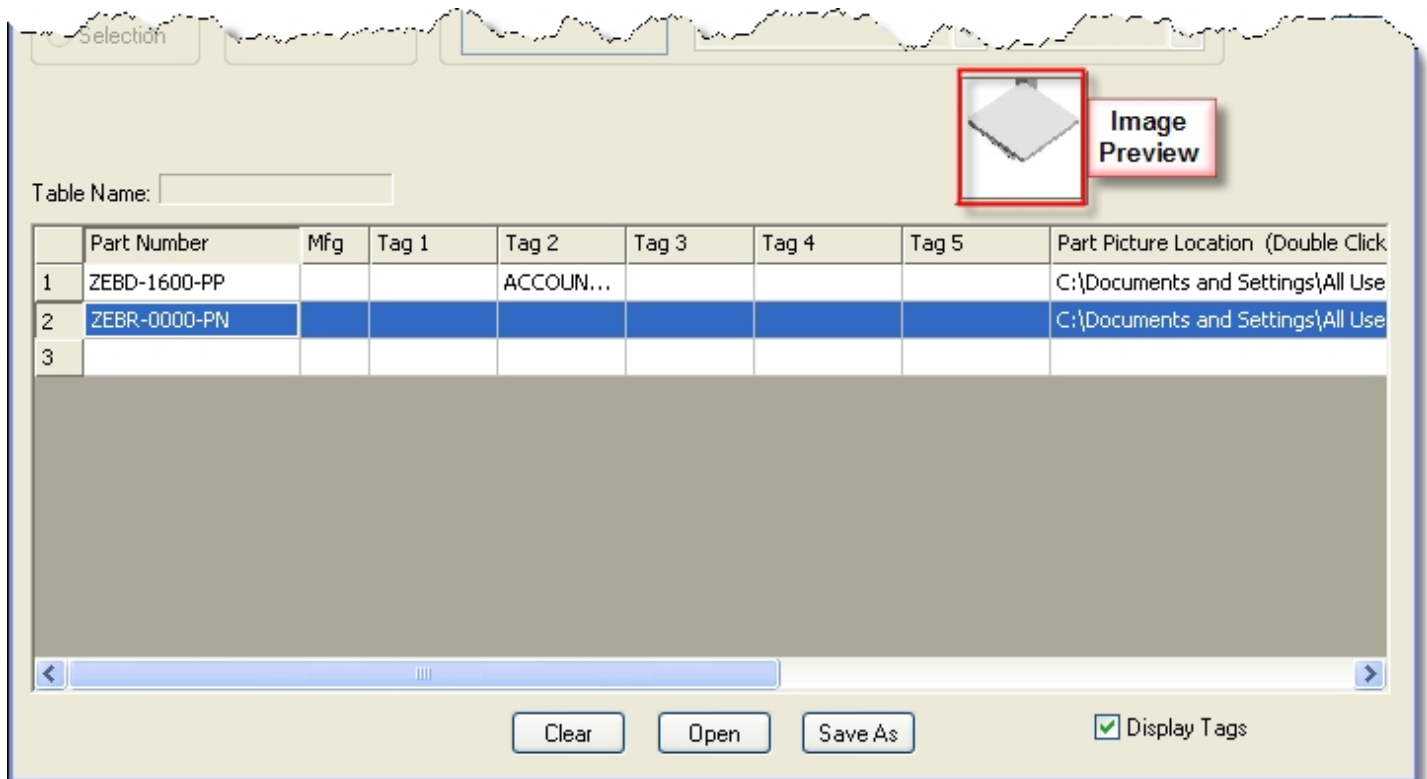
Upper Half:
The upper half of the Part Picture Association dialog has three boxes.

Records- Determines which records in the SIF will have the associations in the table applied to them. You can choose to apply the table to all of the records in the SIF, as well as to a range of records.

You can also choose to apply the table to a selection of records. To do this:
　　　1. In either Classic or Spreadsheet view, hold down (Ctrl) and click on the records to which you would like to apply the table.
　　　2. Open the Part Picture Association dialogue box.

Record Number(s)- If you want to apply the table to a range of records, this box allows you to enter the start and end number.

Criteria- Further narrows down the range of records to which the table will be applied. The user defines these fields.

There are two important buttons in the upper half of the dialog.

Apply- Applies the parameters in the table to the records specified in the boxes in the upper half of the dialog. The Part Picture Association dialog closes and returns to the project.

Cancel- Closes the dialog and does nothing. No data is saved in he table and the user returns to the project.

It is possible to add to the Part Picture Association Table directly from Classic View.

To do this, right click on the image you would like to add to the table and click on "Add Picture to Association Table". The picture will then appear in the Part Picture Association Table along with the Part Number of the record in which it resides. The user can use this method to build Association Tables quickly from a SIF with pictures already in place.
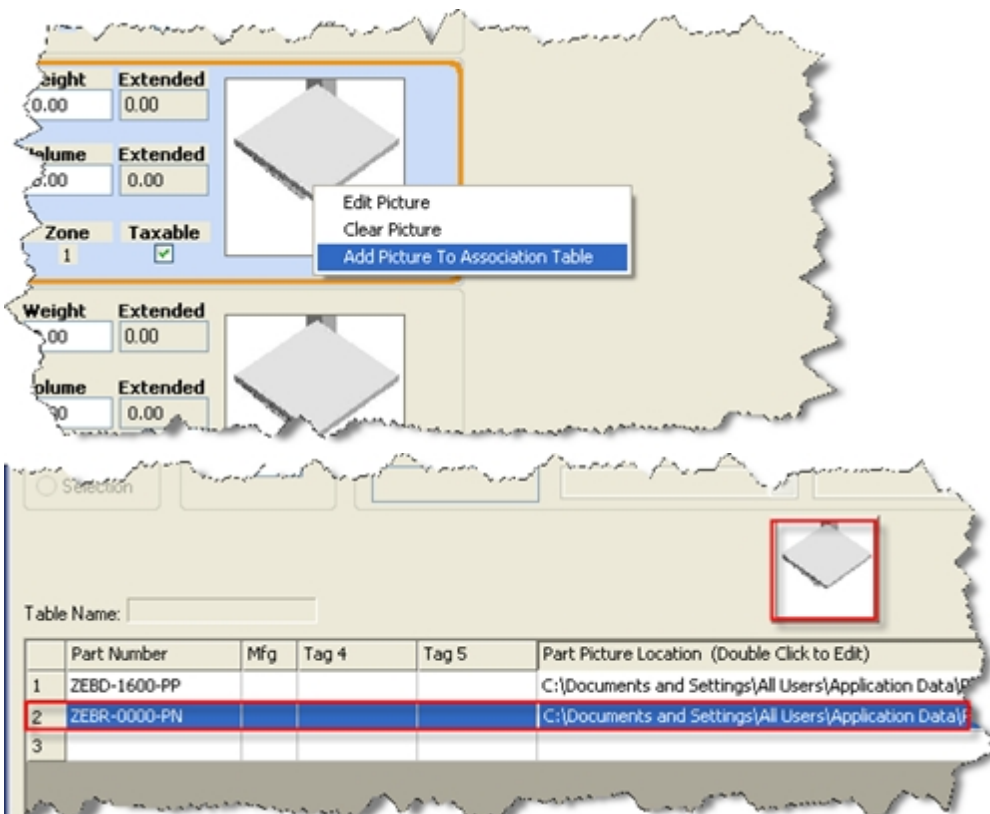
ProjectInfo

ProjectInfo

ProjectInfo tracks non-furniture specific aspects of a total project. This allows the user to calculate additional charges, generate people trails, identify servicing dealers, and enter order information including front notes and shipping notes. The ProjectInfo dialogue box has 5 tabs, each of which stores information related to the current project.

There are four buttons on the right side of the ProjectInfo dialogue that are important for all 5 tabs.

OK- Accepts all the data in the tabs and applies it to the current project. The ProjectInfo dialogue closes.

Cancel- Closes the ProjectInfo dialogue and makes no changes to the current project.

Save As- Saves the data in the ProjectInfo dialogue to a .CIF file for later use. Pressing this button opens a small prompt which allows the user to include the data from all 5 tabs, from all tabs but the Additional Charges tab, or from only the Additional Charges tab in the .CIF file.

Load- Loads a .CIF file from the hard drive.

Note- The "Recalculate" button properly belongs to a discussion of the Added Charges tab.

To learn more about the different tabs of ProjectInfo, click on the links below.

Added Charges

Added Charges keeps track of charges added to the project that are not associated with furniture costs; for example, shipping or installation fees.

Below is an example of the Added Charges tab and a description of its columns.

Description- A user defined description of the Added Charge. By default, Design, Shipping, and Install are already entered.

 %- If the Added Charge is a percentage of some aspect of the project, enter it in this column. The field displays N/A if the charge is a flat dollar amount, as opposed to a percentage.

 Of- Defines the parameters of a percentage charge. There are three options: List Price, Customer Sell Price, and Dealer Purchase Price. The field displays N/A if the charge is a flat dollar amount, as opposed to a percentage.

 Choice- Qualifies the operation that determines the charge Total. There are four qualifying statements available: "calculated", "if it is less than", "but not to exceed", and "is equal to".
    a. "calculated" is used for an unqualified percentage charge.
    b. "if it is less than" allows the user to prevent the charge from being applied if the value of the data in the "Of" column

is greater than a user-defined amount in the $Amount field.

    c. "but not to exceed" is used to set a percentage charge that will not exceed a user-defined amount in the $Amount field.

    d. "is equal to" is used to make the user-defined amount in the $Amount field the Total of the charge.

$Amount- If the Added Charge is a flat rate, or is contingent upon a flat rate, enter that amount here.

Apply To- If the Added Charge is a percentage of the project's furniture related costs, the user can determine whether the percentage is to be calculated against "All Records", or "All Taxable" records.

Taxable- Determines whether the Added Charge itself is subject to tax.

Total- The value of the Additional Charge based on the user-filled fields.

Below is a list of buttons in the Added Charges tab of the ProjectInfo dialogue box.

Delete Line- Removes the selected row from the tab.

Clear Table- Clears all data from the tab.

Recalculate- Click this button at any time to recalculate the Total fields for each Additional Charge.

There are three fields in the bottom of the Added Charges tab that ProjectSpec fills in automatically.

Total Customer: This is imported from the Customer $ field in the status bar of ProjectSpec.

List $ 60658.00   Customer $ 60658.00

Total Charges: This is the sum of all the values in the Total column in the Added Charges tab.

Total Order: This is the sum of the Total Customer and the Total Charges fields.

Note- The Added Charges are itemized and integrated into the Summary Page of ProjectSpec's Print function.

Sales Persons

Sales Persons/Service Dealers

This tab allows the user to add information documenting people associated with the current project. ProjectSpec provides two tables for this.

Sales Persons

An example of possible data to put in this table is the sales person's name in the first line, their order entry (or sales assistant) in the next line, and the designer on the last line. The Number column is made available for employee numbers or tracking identifiers.

Servicing Dealers

Similar to Sales Persons in that it gives you a way to track other people or companies that are involved in the current project.

There are two buttons under each table:

Remove- Removes the selected item from the table.

Remove All- Removes all items from the table.

Note- The Sales Persons and Service Dealers are integrated into the Cover Page of ProjectSpec's Print function.

Ship To/Sold To

Sold To/Ship To

ProjectSpec provides a "Sold To" and a "Ship To" section on the Cover Page of its Print function. This section can track information about the user's company, manufacturers, clients, or other businesses.

There are two buttons under the Sold To and Ship To boxes:

Save Customer- If the "Code" and "Company" fields have been filled out, ProjectSpec can save the information in the box to be loaded later.

Load Customer- This opens a table with stored company information in it. Saved company information can be retrieved into either box, regardless of which box it was in when it was saved.
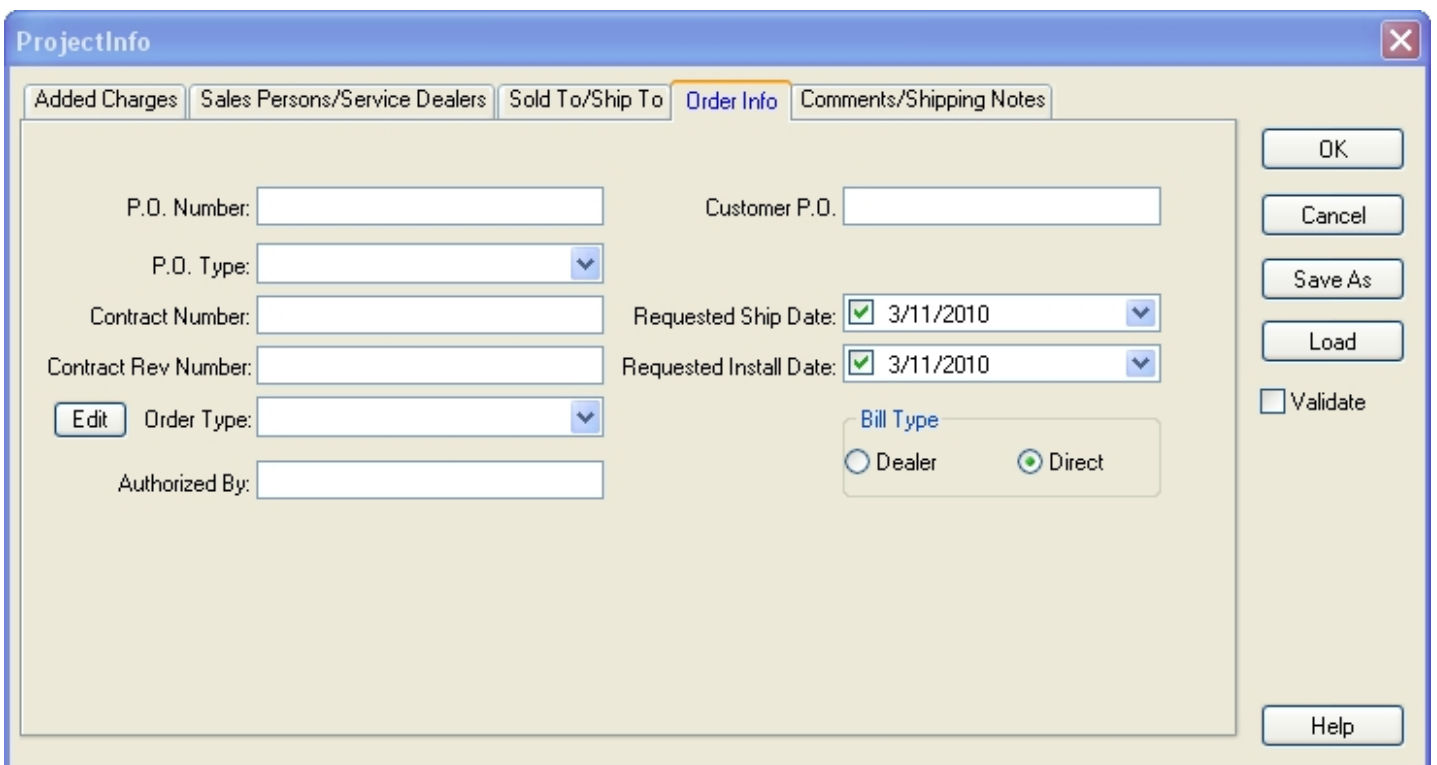
Order Info

ProjectInfo provides the Order Info tab to track order identification numbers. All of the fields can be edited fully by the user.

Information in the Order Info tab appears on the Cover Page of ProjectSpec's Print function.

Comments

Comments/Shipping Notes

ProjectInfo provides a Comments section on the Cover Page of its Print function, and a Shipping Notes section on the Summary Page.

The Comments field is limited to 10 lines of text, while the Shipping Notes field is limited to 2 lines of text.

Print

Print

ProjectSpec offers many options for customizing reports. This section will discuss the Print function, and illustrate how the user can customize their reports.

Click on the links below for a full description of each step in the printing process.

Print Setup
Custom Layout Setup
Quick Print

Print

Print Setup

To open the Print dialogue box, click on the Print icon in the toolbar , press (Ctrl+P), or access the pull-down menu File/Print.
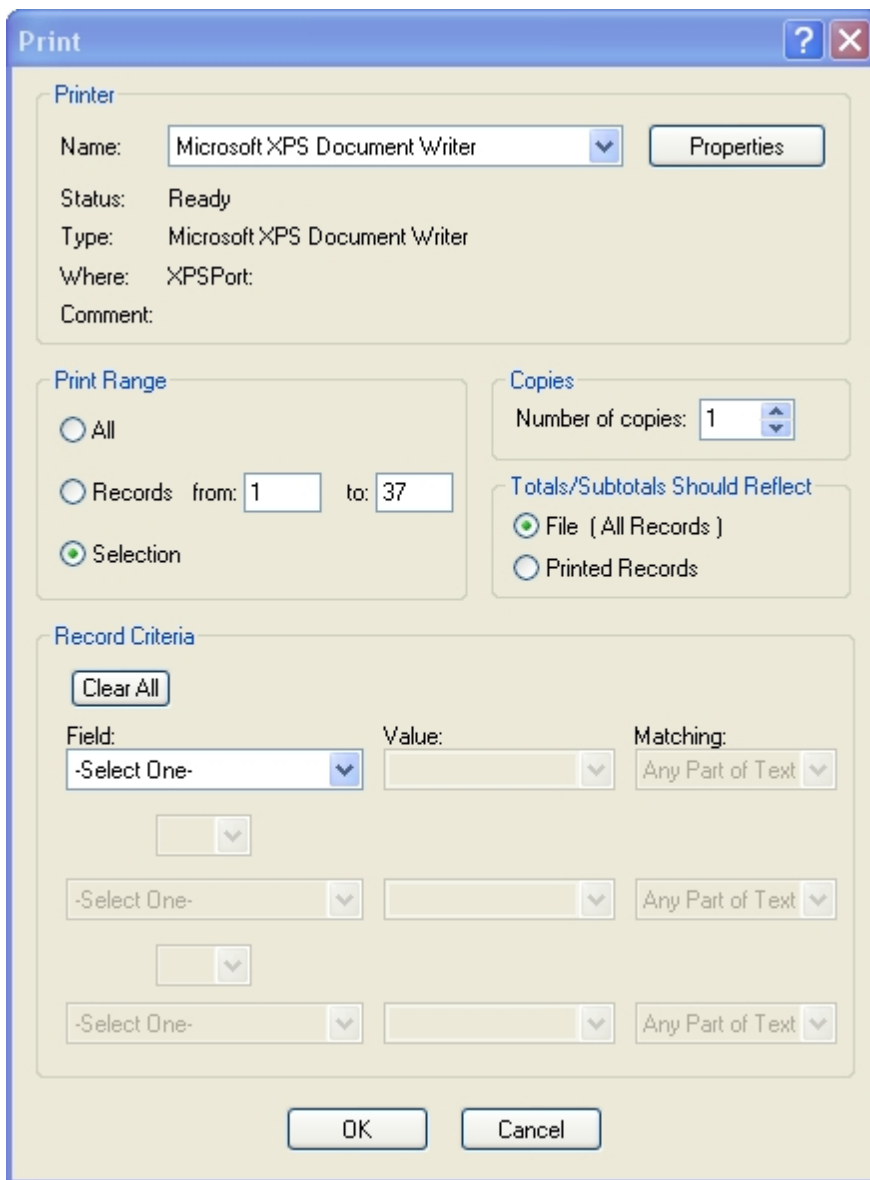
The Print dialogue has several important boxes in it.

Printer- Allows the user to select the printer they would like to use from a drop-down bar.

Print Range- Determines which records in the SIF to include in the report. You can choose to print all of the records in the SIF, or a range of records.

You can also choose to print a selection of records. To do this:

     1. In either Classic or Spreadsheet view, hold down (Ctrl) and click on the records you would like to include in the report.

     2. Open the Print dialogue box.

Copies- Determines the number of copies of your report that will print.

Totals/Subtotals Should Reflect- If there are subtotals in your SIF, this determines if they will include data from the entire SIF or only from the records that are being included in the Print function.

Record Criteria- Further narrows down the range of records that will be included in the report by the content in specified fields. Click the "Clear All" button at any time to reset the fields in this box.

There are two buttons at the bottom of the Print dialogue box.

OK- Accepts the data entered in the Print dialogue and proceeds to the Custom Layout Setup.

Cancel- Closes the Print dialogue and returns to the current project.

Print

Custom Layout Setup

Clicking **OK** in the Print dialogue box opens the Custom Layout Setup. The Custom Layout Setup can also be opened at any time by accessing the pull-down menu File/Custom Layout Setup.
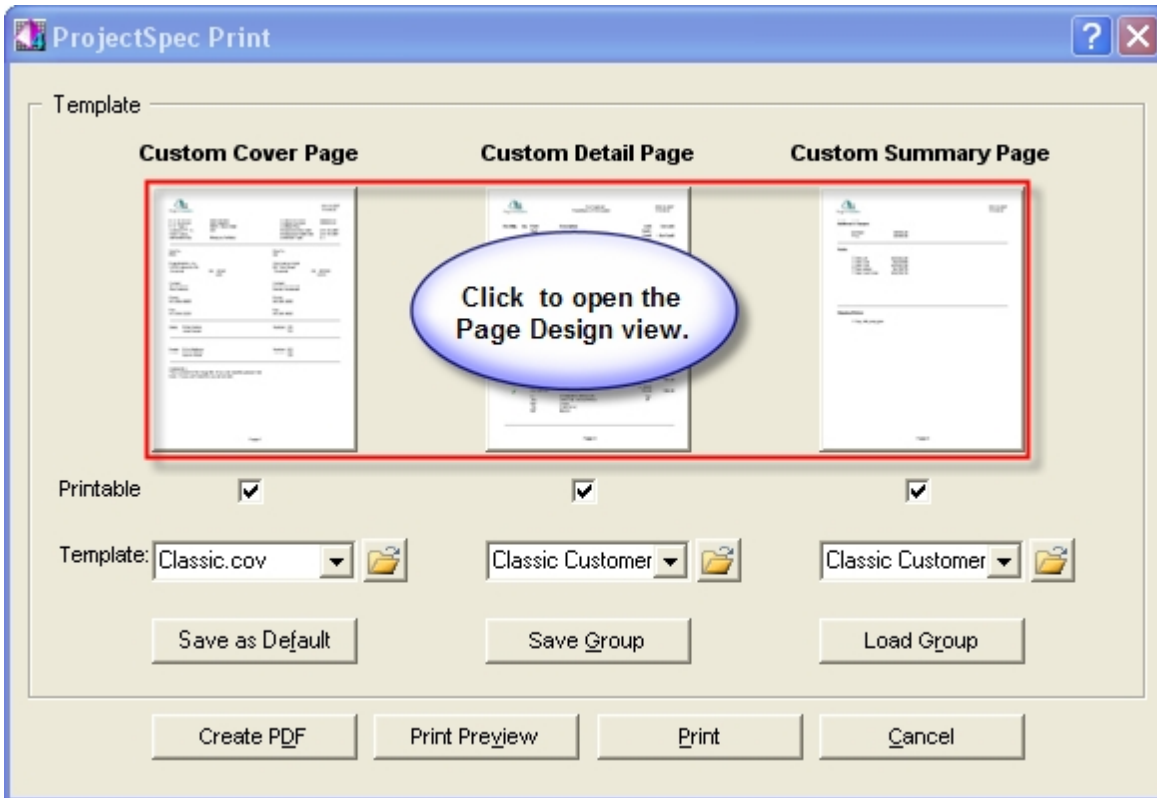
The Custom Layout Setup box contains one large section entitled "Template". This section has four important elements in it.

    1. Three Custom Page icons; one represents the Cover Page, another, the Detail Page, and the third, the Summary Page. These can be clicked on to open the Page Design View.

    2. Three Printable check boxes, one under each page type. If the box is checked, that page will appear in any of the print functions initiated on this page, such as a PDF, a Print Preview, or an actual Print of the report.

    3. Three Template fields. Every iteration of each Page is associated with a template file. When the Custom Layout Setup page is opened, the default templates are chosen. Other templates files can be chosen through the drop-down box or by clicking on the browse icon .

    4. Three buttons. "Save as Default" saves the currently selected templates as the default templates when the Custom Layout Setup opens. "Save Group" saves the currently selected templates as a group (.grp) file, to be loaded again later. "Load Group" loads a group (.grp) file from the hard drive.

    Note- By default, .grp files are stored in the Print Templates folder inside the main ProjectSpec4 folder.

At the bottom of the Custom Layout Setup box are four buttons that control the print functions of ProjectSpec.

    Create PDF- This generates your report in a PDF file that you can save to the hard drive.

    Print Preview- Opens a Print Preview window to preview the report. (Sample below) The Print Preview can also be opened from the drop-down menu File/Print Preview.
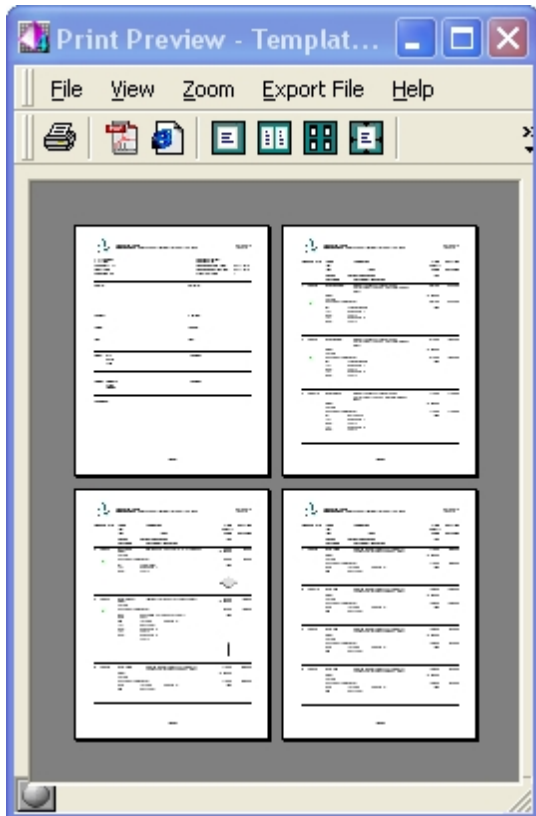
Print- Prints your report. If the Custom Layout Setup was opened from the [Print Setup](#) page, it will follow the specifications set there. If it was opened from the pull-down menu File/Custom Layout Setup, it will try to print through the default settings.

Cancel- Closes the Custom Layout Setup box and returns to the project.
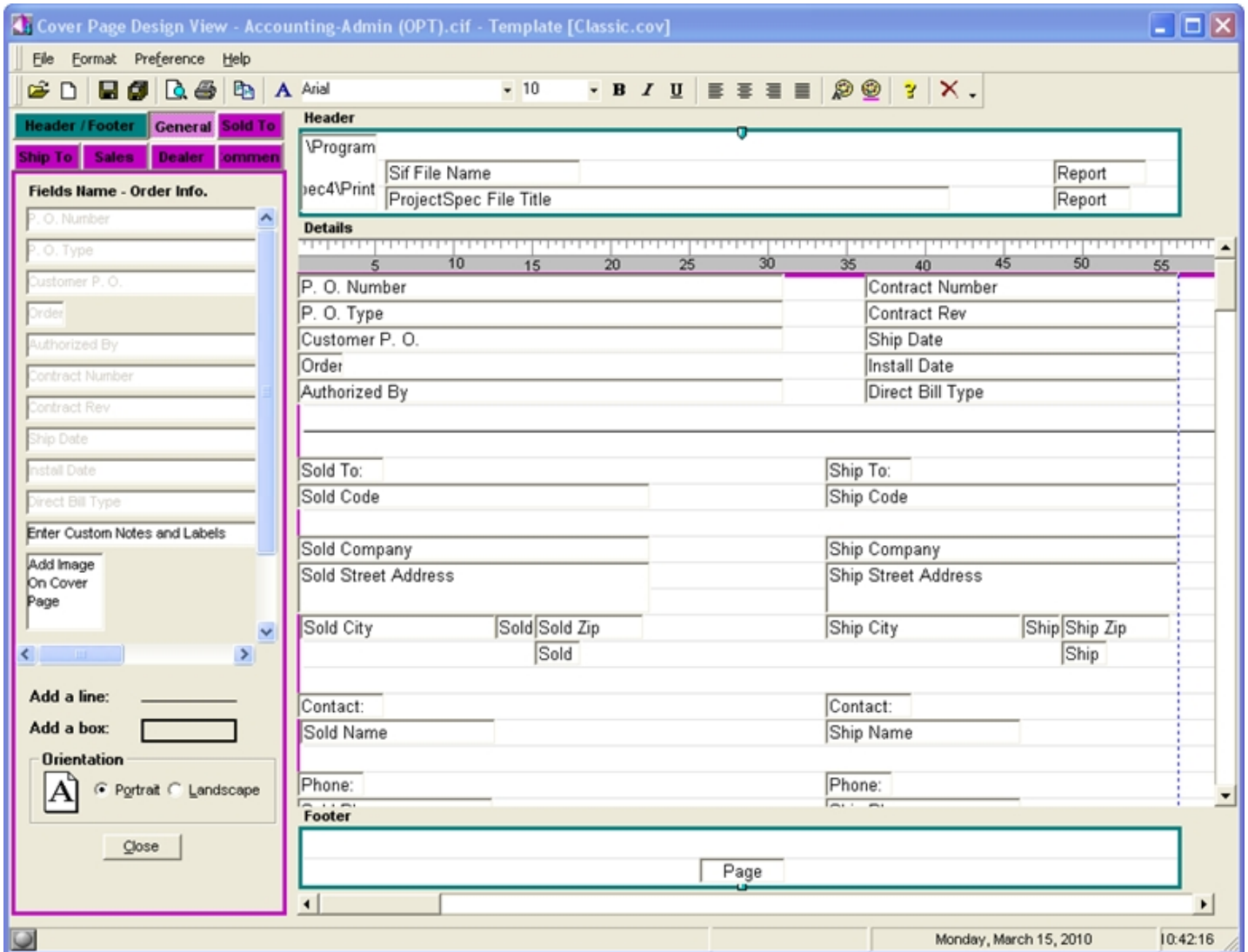
Customize

Page Design View

The Page Design View allows the user to customize their printed reports for layout and style. Customization is meant to be intuitive, and comprises a basic drag-and-drop mechanic.

In the Cover Page Design View window below, note that there are four distinct panes, each with a colored border.

1. The left hand, or **Fields Name**, pane represents the library of possible fields you can add to and arrange on your page template.
2. The top, or **Header**, pane represents the header of the page you are customizing.
3. The central, or **Details**, pane represents the main section of the page you are customizing.
4. The bottom, or **Footer**, pane represents the footer of the page you are customizing.

Above the **Fields Name** pane are several tabs. One of them, colored green, is the **Header/Footer** tabs, the others, colored pink, represent the different sections of the page you are customizing. Clicking on each tab displays the possible fields you can add to that section in the **Fields Name** pane.

The colors surrounding each pane are important. When the green, **Header/Footer** tab is selected, the **Fields Name** pane receives a green border. This means that the fields in the **Fields Name** pane can only be added to panes bordered by the same color, namely, the **Header** and **Footer** panes. To remove a field from any of the three **Header**, **Details**, or **Footer** panes, click on the field and drag it out of the pane.

The example below will show you how to replace the "Page" field in the Footer pane with a "Page n of" field. Instead of displaying only the page number in the printed report, the "Page n of" field will display the current page number and the total number of pages in the report.

Example: How to delete and add a field:

Step 1: Click and drag the "Page" field out of the **Footer** pane.

Step 2: When asked if you would like to delete the "Page" field, click "Yes".

ProjectSpecPrinting

Are you sure you want to delete this field?

| Yes | No |
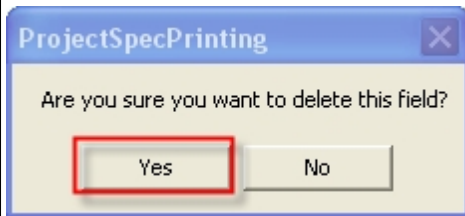
Step 3: Click on the **Header/Footer** tab. Note that the **Fields Name** pane receives a green border.

Step 4: Click and drag the "Page n of" field into the **Footer** pane.

| Header /Footer | General | Sold To |
| Ship To | Sales | Dealer | ommen |

Fields Name - Header / Footer

Report

Report

Report Date _Time

Enter Custom Notes and Labels

Page

Page n of

ProjectSpec File Title

Sif File Name

Click

Click and Drag

Logo

Add a line: _____

Add a box: ⬚

Orientation

🅰 ⦿ Portrait ⚬ Landscape

Close

Footer

Page n of
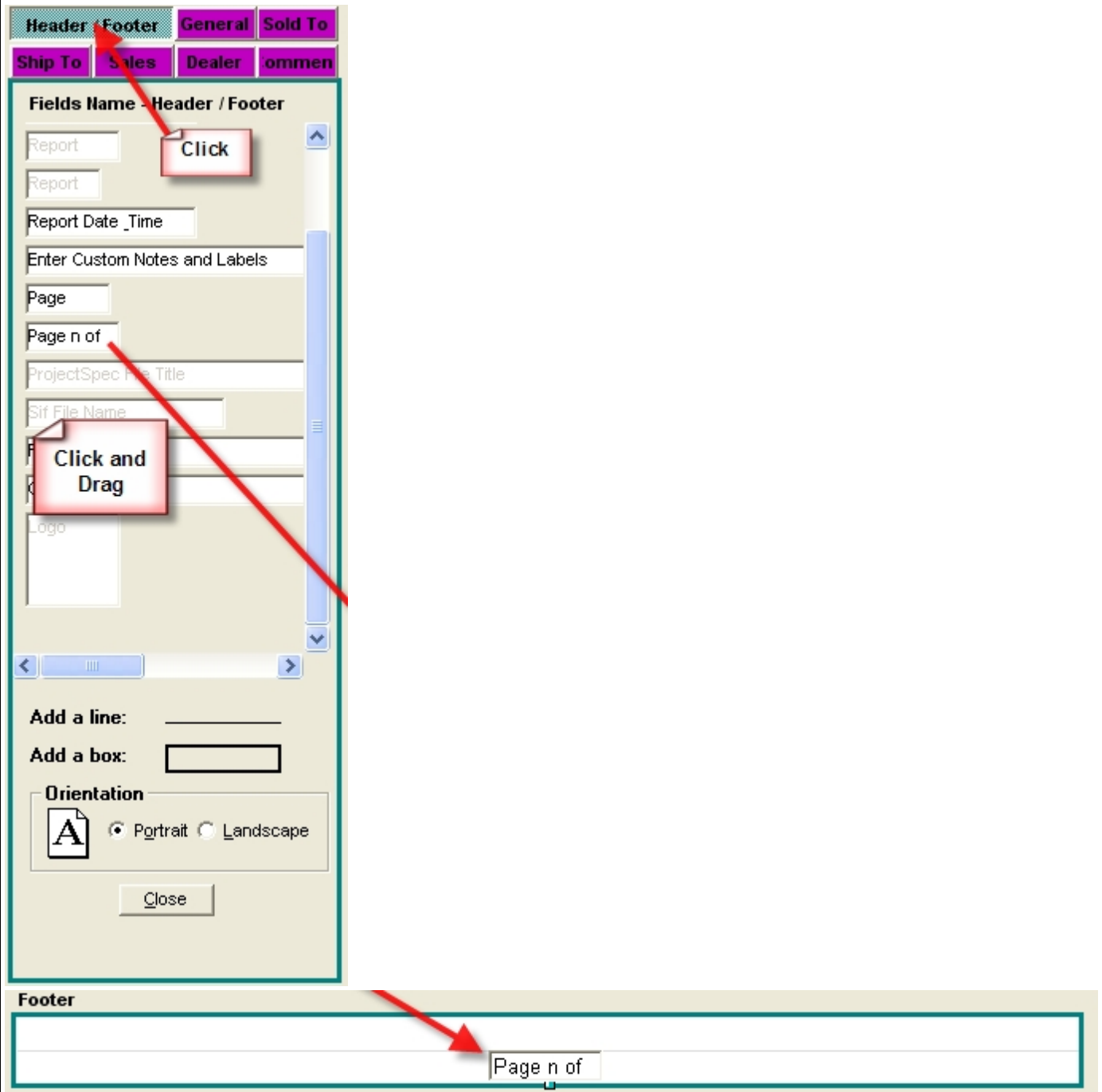
Remember: Fields from the **Header/Footer** tab, which has a green border, can only be placed in either the **Header** or **Footer** panes, which also have green borders. Fields from any of the other tabs, all of which have pink borders, can be dragged into the **Details** pane, which has a pink border, but neither the Header nor the Footer pane.

The Page Design View offers several formatting tools, much like a conventional word-processor. Most of these can be found in the toolbar. They allow you to change fonts, allow you to align left, center, and right, and allow you to color the individual fields along with their associated text.

The Save functions are noteworthy. Depending on which template you are customizing, Cover, Detail, or Summary, the file is saved as a different extension in the Print Templates folder, .cov, .cst, and .sum respectively.

At the bottom of the Fields Name pane are three more formatting tools. You can add a line or box to a pane by using the drag-and-drop mechanic as outlined in the example above. Also, you can select a Portrait or Landscape printing layout.
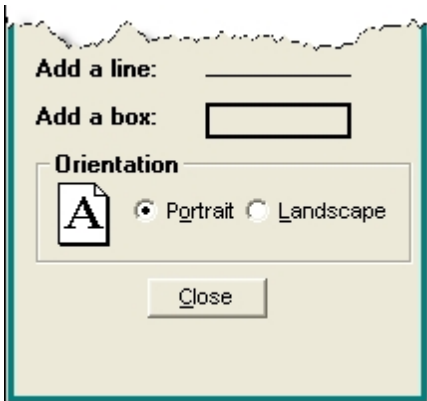
Quick Print

Quick Print

The Quick Print function is available only in Spreadsheet View. It allows the user to print off the spreadsheet as it appears on the ProjectSpec screen. Therefore, it is not a genuine report as much as a quick paper representation of the user's SIF file.

The **Quick Print** function can be accessed by pressing (Ctrl + Q) or through the drop-down menu File/Quick Print. This opens a Print dialogue box similar to the one used in the main ProjectSpec Print function, it lacks only the Record Criteria box.
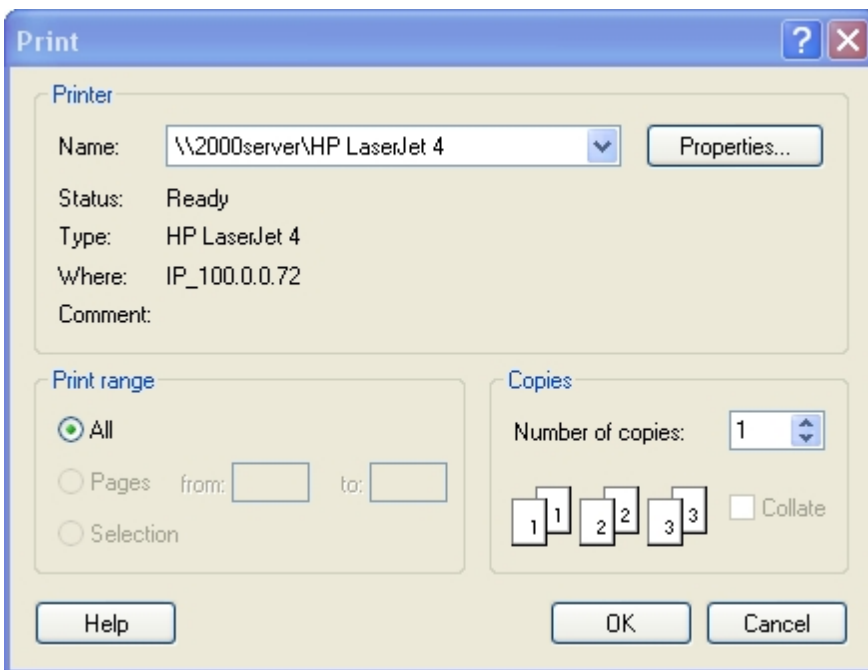
There is also a Quick Print Preview that can be accessed through the pull-down menu File/Quick Print Preview. This opens a preview of the Quick Print report.

Example of a Quick Print Preview:

Note- The Quick Print Report tries to fit all the columns of the Spreadsheet View on the print out, so be sure to include in the Spreadsheet View only the columns needed in your report using the Set Column Display.

Import/Export

Import / Export

Import

Import

Export

Export

Appendix

Appendix

This appendix contains two quick-reference pages:

[ProjectSpec Toolbar](#)
[ProjectSpec Glossary of Commands](#)

Toolbar

ProjectSpec Toolbar

	New File	Begins a new ProjectSpec (SIF) document.
	Open File	Opens an existing ProjectSpec (SIF) document.
	Save	Saves the current ProjectSpec document.
	Cut	Removes a record or records from the active SIF file and places the information on the Windows clipboard.
	Copy	Copies a record or records from the active SIF file and places the information on the Windows clipboard. The requested record(s) will remain in the active SIF file.
	Paste	Pastes the record(s) from the Windows clipboard into the active SIF file. The record(s) will be inserted into the active record. The previous record and all subsequent records will be shifted down to accommodate the inserted records.
	Undo	Reverses the last command or deletes the last entry you typed.
	Redo	Reverses the action of the undo command.
	Print Preview	Shows a view of the active SIF file as it will be printed based on the selections made in File/Page Layout.
	Print	Prints the active SIF file based on the selections made in File/Page Layout.

	Catalog Viewer	Opens the electronic catalog based on information in the active record. This command will prompt for missing information.
	Price Line	Updates the active record with prices and descriptions. This button will NOT prompt for missing information.
	Price From Catalog	Updates the selected records in the active file with prices and descriptions. This button will NOT prompt for missing information.
	Price From File	Replaces the selected record items in the active SIF file by matching the part number, and optionally Tags, in the selected SIF file.
	Find Errors	Searches for the first record with an error in the active SIF file. Starts at the current record and continues down.
	Discount	Applies Purchase and/or sell discounts to a record or records in the active SIF file.
	Replace	Finds and replaces fields or portions of fields in the active SIF file.
	Join	Combines like records with matching criteria in the active SIF file and totals the quantity.
	Sort	Sorts the active SIF file by criteria such as manufacturer code, part number, or tag.
	Edit Options	Displays the option set of the active record for and allows the user to change options.
	Edit Option Notes	Allows the user to include or modify notes attached to the active record.
	Option Clipboard	Allows the user to save sets of options so they can be reused on different records.
	Merge	Inserts a reference to another existing SIF file into the active record.
	Expand Merge	Replaces references to existing SIF file(s) with the individual record details of those files.
	Part Picture	Displays an associated graphic to the active record. (Only available for certain Manufacturers.)
	Set Spreadsheet Column Display	Opens Dialog box that controls what columns are visible in the spreadsheet view.
	Calculator	Launches the Windows Calculator.
	About	Displays the version of the running copy of ProjectSpec.

Commands/Glossary

Commands / Glossary

Name	Icon	Short-Cut	Pull Down Menu Path	Description
About Project Spec			Help/About ProjectSpec	Displays the version of the running copy of ProjectSpec.
Adjust List Price			Price/Adjust List Price	Allows the user to adjust the list price up or down by a factor.
Arrange Icons			Window/Arrange Icons	Moves and aligns minimized open SIF files to the lower left corner of the application screen.
AutoDiscount			Price/AutoDiscount	Toggles On/Off. When on, each new record will be discounted during data entry based on the active discount table.
AutoOptions			Options/AutoOptions	Toggles On/Off. When on, AutoOption will automatically select a previously selected option if it is available again within the same part.

Both		ALT+ B	View/Field/Options/Both	Displays Codes and Descriptions vertically. If necessary a scroll bar will appear to allow viewing of all descriptions and codes.
Calculator			Tools/Calculator	Launches the Windows Calculator.
Cascade			Window/Cascade	Arranges multiple open SIF files in an overlapping manner.
Catalog Manager			Tools/Catalog Manager	Allows user to control what electronic catalog is active or inactive and also if specific manufacturers' electronic catalogs are open or closed.
Catalog Viewer		F2	View/Catalog Viewer	Opens the electronic catalog based on information in the active record. This command will prompt for missing information.
Check for Newer Version			Help/Check for Newer Version	Automatically checks for updates for ProjectSpec over the web.
Classic		F12	View/Interface/Classic	Displays all price fields in the "classic" ProjectSpec view.
Clear			Edit/Picture/Clear	Removes pictures from the active SIF file.
Clear			Options/Edit StandardOptions/Clear	Clears the StandardOption selection
Clear All			Edit/Picture/Clear All	Removes ALL pictures from the active SIF file.
Client			View/Interface/Screen	Disables Dealer purchase discounts and prices as well as calculated margins. Use this mode to save SIF files to give to clients as Dealer

				Percent is not saved in this mode.
Clipboard Viewer		F4	Options/Clipboard Viewer	Allows the user to save sets of options so they can be reused on different records.
Close			File/Close	Closes the active SIF files.
Code		Alt+[	View/Fields/Options/Code	Shows only Option Code in Classic View
Copy Record		Ctrl+Shift+C	Edit/Copy Record	Copies a record from the active SIF file and places the information on the Windows clipboard. The requested record will remain in the active SIF file.
Copy Record Range			Edit/Copy Record Range	Copies a record or records from the active SIF file and places the information on the Windows clipboard. The requested records will remain in the active SIF file.
Create Standard Option from File			Options/Create Standard Options from File	Creates a new Standard Option set from an existing SIF file. This will add all options from the existing SIF file to the Standard Option table.
Custom Layout Setup			File/Custom Layout Setup	Allows the user to modify how a printed SIF file will appear.

Cut Record		Ctrl+Shift+X	Edit/Cut Record	Cuts a record or records from the active SIF file and places the information on the Windows clipboard. The requested records will be removed from the active SIF file.
Cut Record Range			Edit/Cut Record Range	Cuts a record or records from the active SIF file and places the information on the Windows clipboard. The requested records will be removed from the active SIF file.
Delete Record		Alt+Del	Edit/Delete Record	Cuts the active record from the SIF file and does NOT place the information on the Windows clipboard.
Delete Record Range			Edit/Delete Record Range	Cuts a record or records from the active SIF file and does NOT place the information on the Windows clipboard. The deleted records will be permanently removed from the active SIF file.
Description		Alt+]	View/Fields/Options/Description	Displays the option descriptions vertically. If necessary a scroll bar will appear to allow viewing of all descriptions.
Discount		F11	Price/Discount	Applies purchase and/or sell discounts to a record or records in the active SIF file.
Edit			Edit/Pictures/Edit	Allows the user to add pictures to the SIF file.
Edit Option Notes		Alt+F5	Options/Edit Option Notes	Allows the inclusion or modification of notes as they pertain to the options of the active record.
Edit O		F5	Options/Edit Options	Displays the option set of the active record for modification.

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pti on s				
Ex it			File/Exit	Closes the ProjectSpec program including all open SIF files. Will prompt to save any changes before closing.
Ex pa nd Me rg e		F8	Edit/Expand Merge	Replaces references to existing SIF file(s) with the individual record details of those files.
Ex po rt			File Export	Allows the user to save SIF files as several common file formats.
Fie ld Re pe at		F3	Edit/Field Repeat	Duplicates the information in the current field from the previous instance of being in that field.
Fie lds			View/Fields	Toggles how information is displayed on the screen.
Fi nd		Ctrl+F	Edit/Find	Allows the user to search for certain information contained in the active SIF file. Starts at the current record and continues down.
Fi nd Er ro r		Ctrl+E	Edit/Find Error	Searches for the first record with an error in the active SIF file. Starts at the current record and continues down.
He lp To pic s			Help/Help topics	Displays the main index of the ProjectSpec help file.
Hi de			View/Fields/Options/Hide	Hides Codes and Descriptions.
IC F Ex pl od e			Tools/ICF Explode	Special feature designed for ICF.
Im po rt			File/Import	Allows the user to open some common file types into ProjectSpec.

In se rt			Price/Subtotals/Insert	Inserts a subtotal record into the active record. The subtotal is for all previous items to the previous subtotal or the beginning of the file, whichever occurs first. The previous active record and all subsequent records will be shifted down to accommodate the inserted subtotal.
In se rt by Fie ld			Price/Subtotals/Insert by Field	Inserts multiple subtotals based on a selected field. The file is first sorted by that field and subtotals are inserted at the end of each unique instance of that field. The subtotal is for all previous items to the previous subtotal or the beginning of the file, whichever occurs first.
In se rt Bl an k Re co rd		Alt+Ins	Edit/Insert Blank Record	Inserts the requested number of blank records into the active record. The previous active record and all subsequent records will be shifted down to accommodate the inserted record.
Int erf ac e		F12	View/Interface	Toggles how information is displayed on the screen. Classic or Spreadsheet or Explorer. Normal or Client.
Joi n		F6	Edit/Join	Combines like records with matching criteria in the active SIF file and totals the quantity.
Lo ck Lis t Pri ce			Price/Lock List Price	Locks the List price field so the value can NOT be altered.
Ed it Ma nu all y			Options/Edit Standard Options	Creates or modifies the active set of Standard Options.
Me rg e		F9	Edit/Merge	Inserts a reference to another existing SIF file into the active record.
Ne w		Ctrl+N	File/New	Begins a new ProjectSpec (SIF) document.
No rm al			View/Interface/Screen/Norma l	Displays all price fields in the classic ProjectSpec view.

Open		Ctrl+O	File/Open	Opens an existing ProjectSpec (SIF) document.
Option All		F10	Options/Option All	Automatically applies StandardOptions to the entire active SIF file.
Options			View/Fields/Options	Toggles what information is displayed in the "Options" field. Code, Description, Both, Hide or Spreadsheet columns.
Page Setup			File/Page Setup	Dialog that allows the user to change settings for a printer.
Part Picture Association			Edit/Picture/Part Association	Allows the user to edit the Part Picture Association table.
Paste Record		Ctrl+Shift+V	Edit/Past Record	Pastes the record(s) from the Windows clipboard into the active SIF file. The record(s) will be inserted into the active record. The previous record and all subsequent records will be shifted down to accommodate the inserted records.
Preferences			Tools/Preferences	Displays a dialog box of user configurable settings such as Autosave and Colors.
Picture			Edit/Picture	Allows the user to add or remove pictures on a SIF file.
Picture			View/Picture	Displays an associated graphic to the active record. (Only available for certain Manufacturers.)
Price From Ca			Price/From Catalog	Updates the selected records in the active file with prices and descriptions. This button will NOT prompt for missing information.

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Pri ce Fr o m Fil e			Price/From File	Replaces the selected record items in the active SIF file by matching the part number, and optionally Tags, in the selected SIF file.
Pri ce Li ne		F7	Price/Line	Updates the active record with prices and descriptions. This button will NOT prompt for missing information.
Pri ce Lo we st			Price/Lowest	Updates the selected records from the active file with the lowest price including options from the catalog and updates the descriptions. This button will NOT prompt for missing information.
Pri nt		Ctrl+P	File/Print	Prints the active SIF file based on the selections made in File/Page Layout.
Pri nt Pr evi ew			File/Print Preview	Shows a view of the active SIF file as it will be printed based on the selections made in File/Page Layout.
Pr oj ect An aly sis			Tools/ProjectAnalysis	Starts the ProjectAnalysis program that will compare multiple SIF files.
Pr oj ect De tai l			Tools/ProjectDetail	Future feature NOT available at this time.
Pr oj ect Inf o			Tools/ProjectInfo	Opens the ProjectInfo dialog box for input of non-furniture related expenses and miscellaneous supporting information including purchase order numbers, scheduling, and shipping instructions. Saved information creates a CIF file.
Q uic k Pri nt		Ctrl+Q	File/Quick Print	Prints out what's viewable under the spreadsheet view.

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Quick Print Preview			File/Quick Print Preview	Shows a view of the active SIF file as it will be printed if using the Quick Print feature.
Recover Auto Save			File/Recover Auto Save	Opens the auto save file. Used when current file is missing or damaged.
Redo	↻	Ctrl+Y	Edit/Redo	Reverses the action of the undo command.
Remove Subtotals			Price/Subtotals/Remove Subtotals	Deletes all of the subtotal records from the active SIF file.
Replace		Ctrl+R	Edit/Replace	Finds and replaces fields or portions of fields in the active SIF file.
Save		Ctrl+S	File/Save	Saves the current ProjectSpec document.
Save All			File/Save All	Saves all open SIF file(s) using their current names.
Save As			File/Save As	Saves the active SIF file and prompts for a specific name.
Smart Copy		Shift+F4	Edit/Smart Copy	Duplicates the options from the most recent part number that contains the same first four characters.
Sort			Edit/Sort	Sorts the active SIF file by criteria.
Spread		F12	View/Interface/Spreadsheet	Displays the active SIF file in a spreadsheet format to allow more records to be visible.

sheet			
Spread Sheet Column Display	Alt+C	View/Options/Spreadsheet Column	Opens Dialog box that controls what columns are visible in the spreadsheet view.
Standard Options		Options/Standard Options	Toggles ON/OFF. When on, Standard Option will automatically select an option detected in the active Standard Option set if it is available for that part.
Startup		Help/Startup	Launches the ProjectSpec startup screen.
Status Bar		View/Status Bar	Alternately displays or hides the ProjectSpec Status Bar.
Tile		Window/Tile	Arranges multiple open SIF files in a non-overlapping (tiled) manner.
Toolbar		View/Toolbar	Alternately displays or hides the ProjectSpec Toolbar.
Undo	Ctrl+Z	Edit/Undo	Reverses the last command or deletes the last entry you typed.
Unlock List Price		Price/Unlock List Price	Unlocks the List price field so the value can be altered.

ProjectSpec Preferences

Range & Criterea Dialog
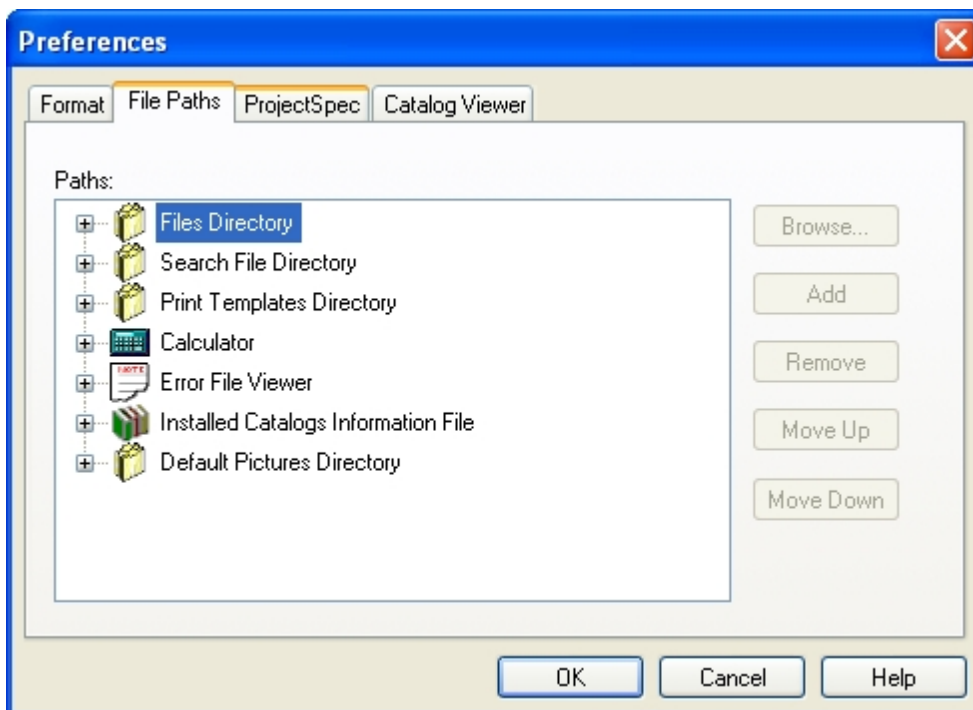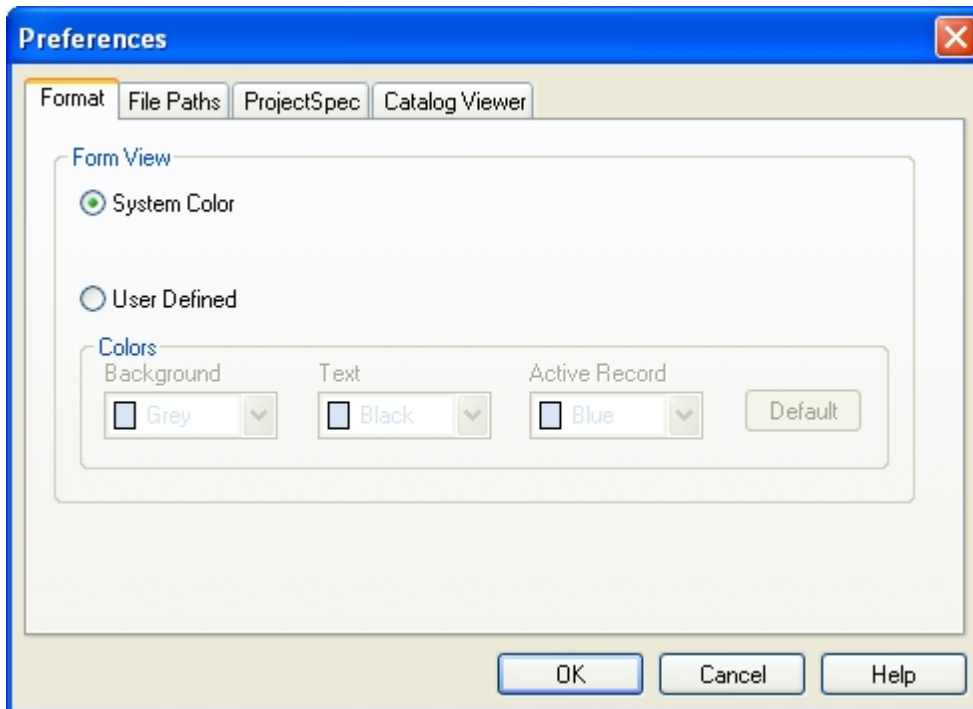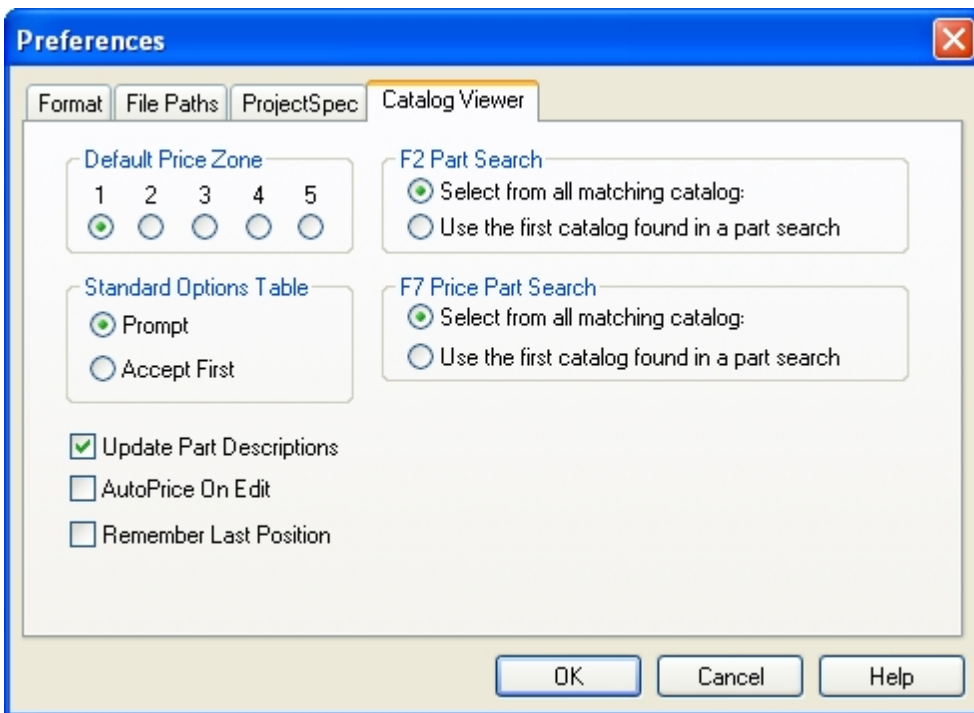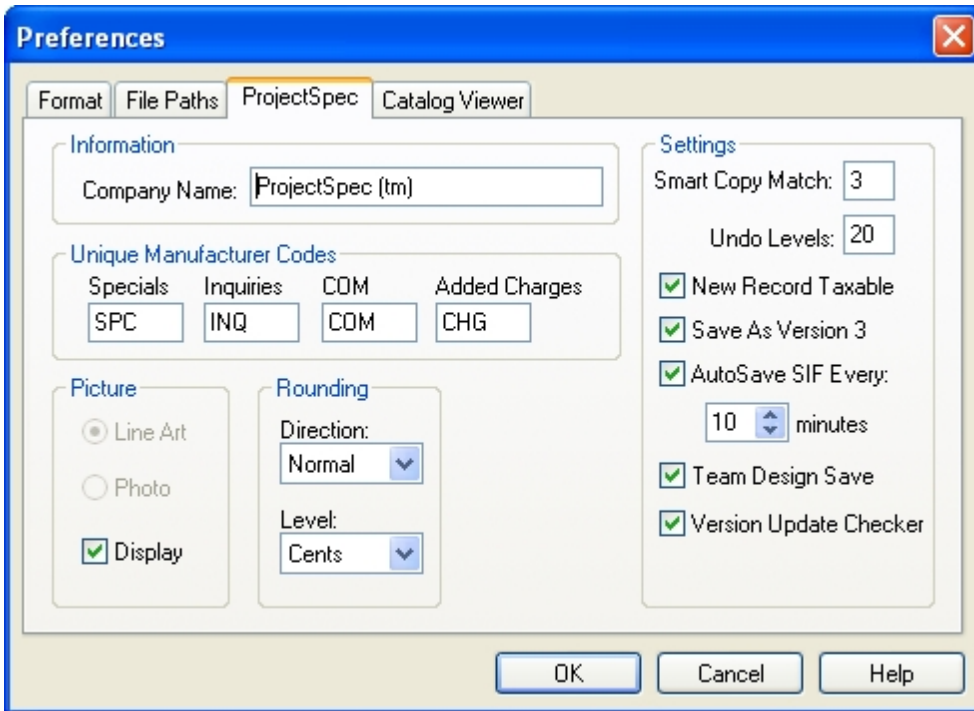
Using the Range & Criteria Dialog

ProjectAnalysis

ProjectAnalysis

ProjectAnalysis is a program separate from ProjectSpec. Its purpose is to allow ProjectSpec users to perform "what if?" scenarios com-paring lists of existing product to a list of total product required. The most common use of ProjectAnalysis is to compare the contents of a SIF file generated from an AutoCAD drawing of a proposed reconfiguration against the SIF files of the existing layout and any parts that may be in stock. ProjectAnalysis may also be used for other varied purposes including comparing one layout to another, checking new orders against stock, etc.

ProjectAnalysis allows you to compare the SIF file of the Total Parts Required to Assemble a New Layout to as many as 10 other SIF files containing existing inventory. The resulting SIF files detail:

> 1) what parts can be reused from each existing location,
> 2) what parts from each existing location will not be used and will be in excess and
> 3) the net product that is required, not available in Total Quantity and must be ordered as new.

You should always perform a manual comparison of the new product required to the excess product available, as there may be specific design changes that can be implemented, which will result in reduced excess product and fewer new products being required. The net affect of this is fewer parts in inventory and a happier customer. Examples of design changes include the use of excess powered panels for required non-powered panels (or vice versa by adding in-expensive power kits) or for example combining multiple narrower width components for a larger one and using two 36" worksurfaces instead of one 72" surface.

After comparing the list of required parts to the list(s) of parts on hand, ProjectAnalysis generates a detailed spreadsheet-style report of the compared results. This report tells you if the required parts were found, where they were found, how many of each were found, what parts will be left over and what parts are needed that weren't found in any existing inventory parts list. Along with this report, SIF files are generated that break down the compared results.
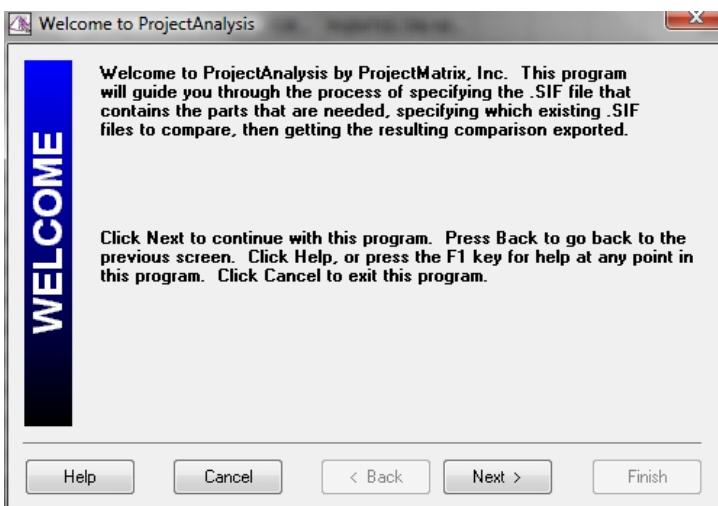
Specify Project Information - Step 1

Enter the name and location of this project below. This name will be used to generate the names of the input, excess, and output files in the specified directory.

Project Name:

MyProject

Project Output

[ ]

Help   Cancel   < Back   Next >   Finish

Project Name

Specify Required Product .SIF File - Step 2 of 5

Enter the location of the .SIF file below that contains information on the required product.

Required Product File:

[ ]

Sif File Title:

[ ]

Date Last

[ ]

Number of Parts in This .SIF File:

[ ]

Help   Cancel   < Back   Next >   Finish

Required .SIF