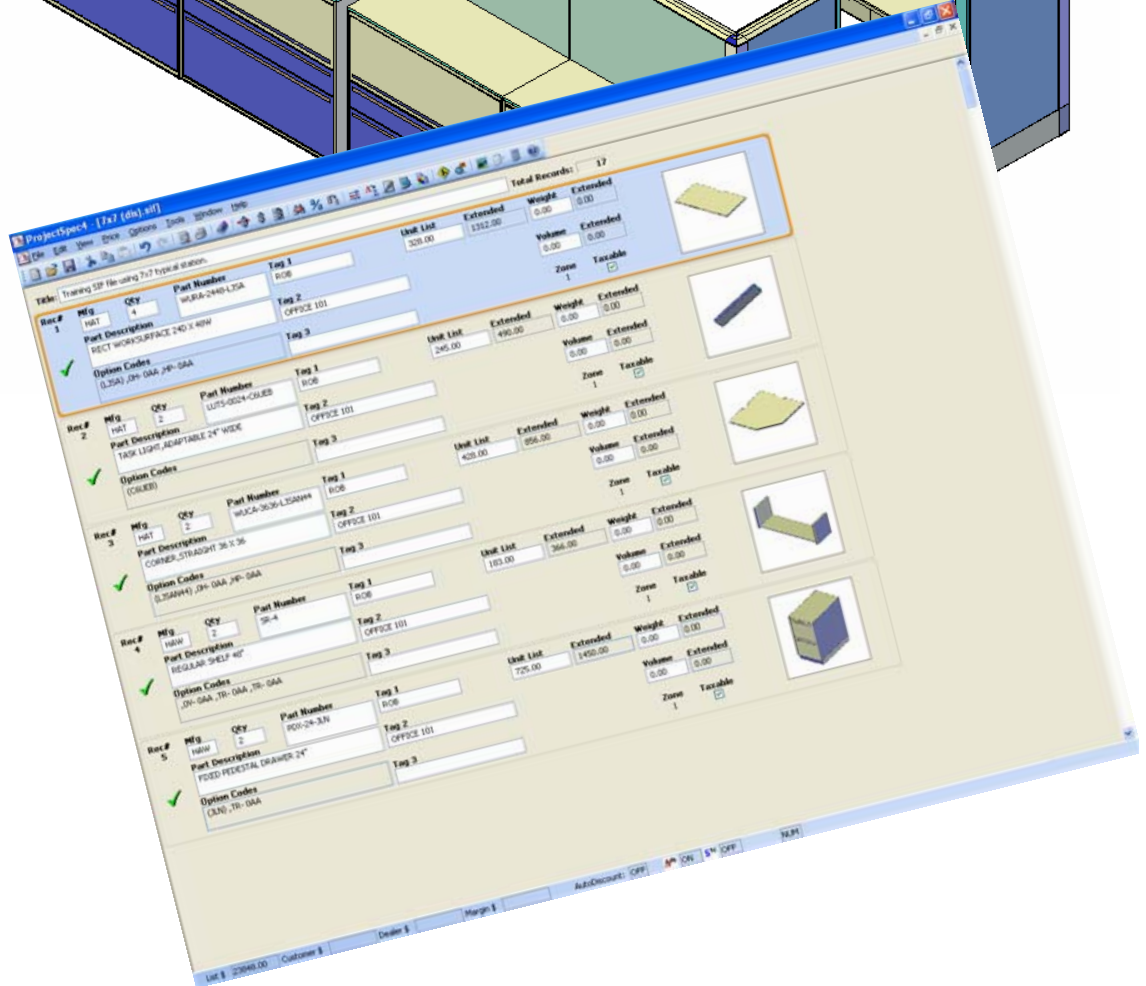
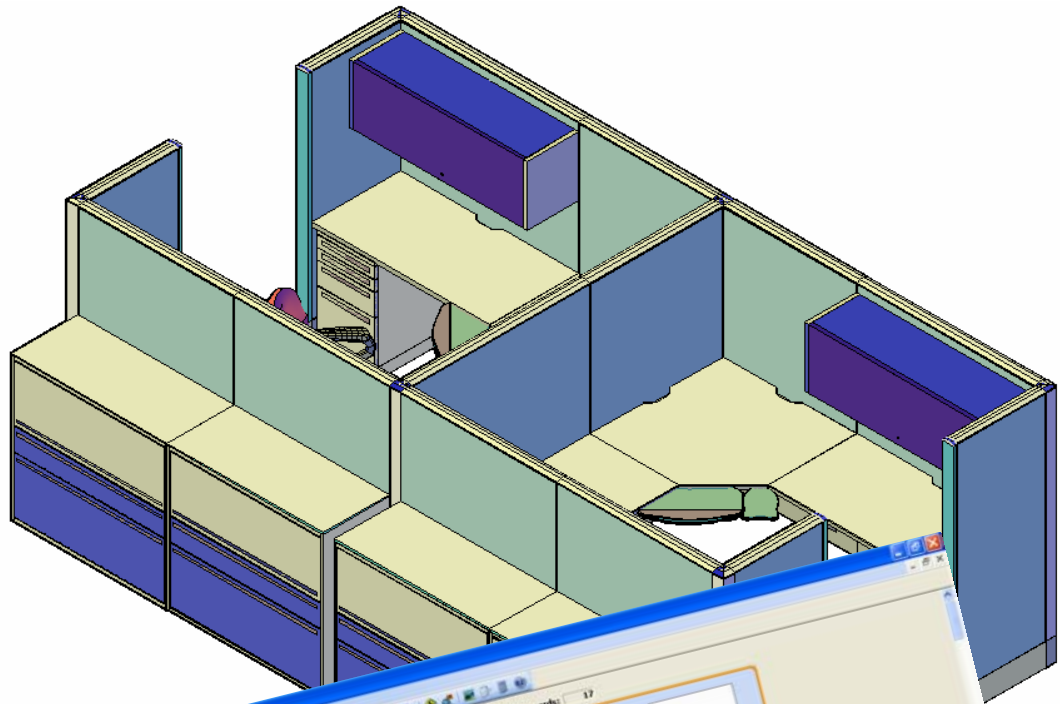
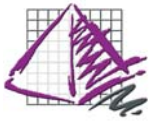


# ProjectSpec Help With Tips & How To's

# ProjectSpec





## Function Keys

F1 = Help Guide

F2 = Catalog Viewer

F3 = Field Repeat

F4 = Option Clipboard

Shift + F4 = Smart Copy

F5 = Edit Options

F6 = Join

F7 = Price Line

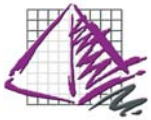
F8 = Expand Merge

F9 = Merge

F10 = Option All

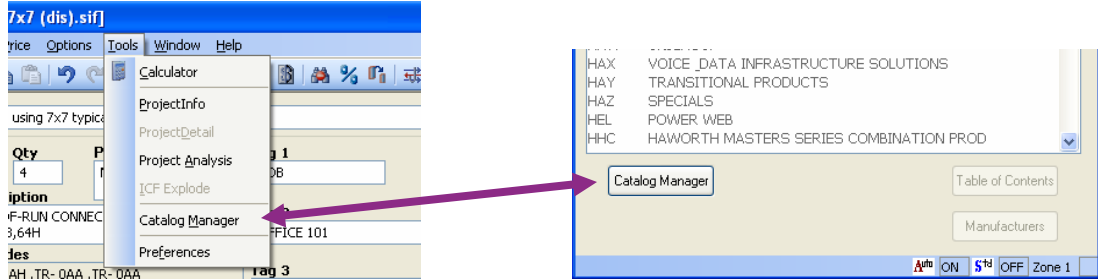
F11 = Discount

F12 = Toggle Classic/Spreadsheet View

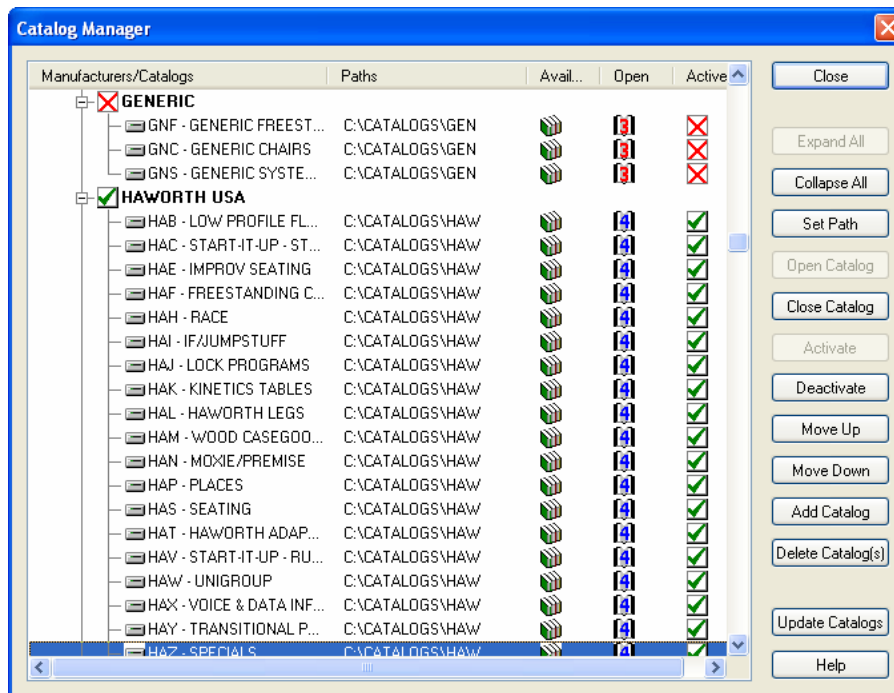


# Catalog Manager

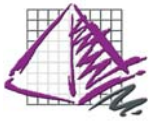
ProjectSpec



The catalog manager is a great way to keep your ProjectSpec running quickly and efficiently. Once catalogs are installed, you are able to activate and deactivate catalogs. An active catalog will show up in the Catalog Viewer, and will be searched when you price or F2 a line item to option it out. The more catalogs that are active the longer it will take to search for the part. The entire Manufacturer can be activated/deactivated or individual catalogs within the MFG.



From this dialog box, you can also use the “Update Catalogs” button to automatically access our online catalog data and update to the newest available pricing.




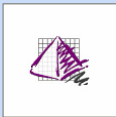
# Creating a Record Line



You can either browse through the electronic catalogs to insert a part number by using the Catalog Reader button on the toolbar or by hitting F2 on the keyboard.

You can also type in a part number in the PN field and press F2 to search for the part number.

If you don't know the complete part number then use a WILDCARD ( \* )

| Rec# | Mfg | Qty | Part Number  | Tag 1        | Unit List | Extended | Weight        | Extended                            |   |
|------|-----|-----|--|--------------|-----------|----------|---------------|-------------------------------------|---|
| 6    | HAE | 2   | M211-1341  | ROB          | 792.00    | 1584.00  | 0.00          | 0.00                                |   |
|      |     |     | <b>Part Description</b>                                | <b>Tag 2</b> |           |          | <b>Volume</b> | <b>Extended</b>                     |   |
|      |     |     | MB SYNC_PNEU/BK-LCK,POLY SHELL,VINYL ARMS,HARD CASTERS | OFFICE 101   |           |          | 0.00          | 0.00                                |   |
|      |     |     | <b>Option Codes</b>                                    | <b>Tag 3</b> |           |          | <b>Zone</b>   | <b>Taxable</b>                      |   |
|      |     |     | ( ) (2) ,YW- OCD ,TR- 00F                              |              |           |          | 1             | <input checked="" type="checkbox"/> |   |
| 7    |     | 0   |  |              | 0.00      | 0.00     | 0.00          | 0.00                                |  |
|      |     |     | <b>Part Description</b>                                | <b>Tag 2</b> |           |          | <b>Volume</b> | <b>Extended</b>                     |   |
|      |     |     |  |              |           |          | 0.00          | 0.00                                |   |
|      |     |     | <b>Option Codes</b>                                    | <b>Tag 3</b> |           |          | <b>Zone</b>   | <b>Taxable</b>                      |   |
|      |     |     |  |              |           |          |               | <input checked="" type="checkbox"/> |   |

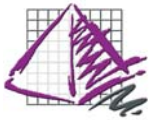
Examples of a WILDCARD:

Full part number for a worksurface would be [WURA-2436-LJSA](#).

You could do [WURA-\\*](#) and find all sizes and options for that part.

You could do [WURA-\\*-LJSA](#) to find all sizes for that part with those options.

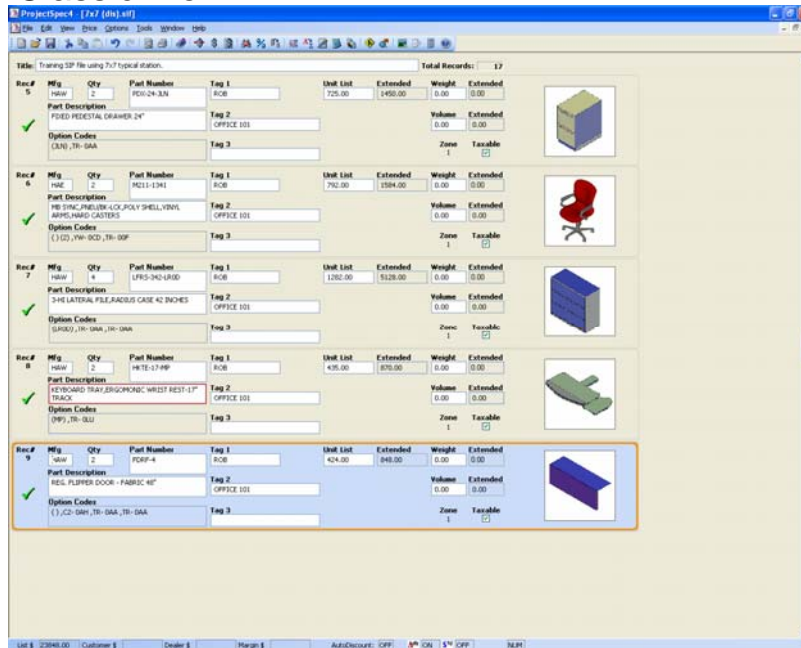
You could do [WURA-24\\*-LJSA](#) to find all 24" deep worksurfaces with those options.



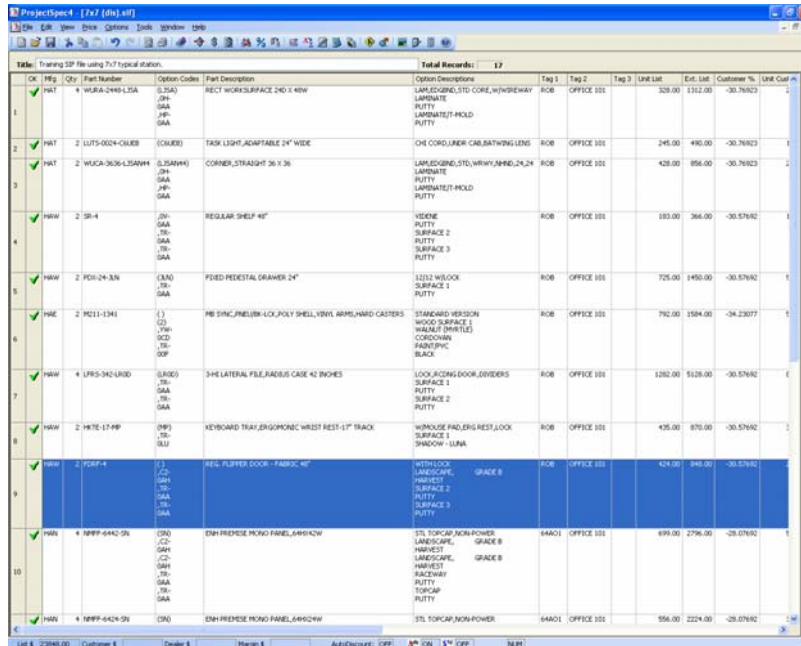
# ProjectSpec Views

# ProjectSpec

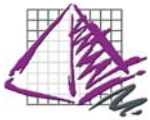
## Classic View



## Spreadsheet View



Use the F12 key to toggle views, or the View->interface on the pull down menu.



# ProjectSpec Spreadsheet Views

ProjectSpec

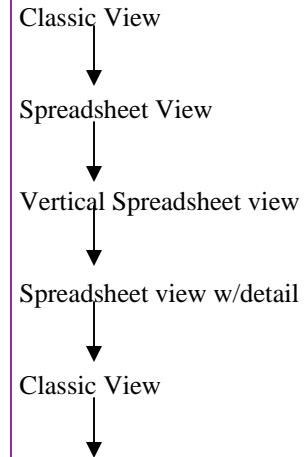
## Standard Spreadsheet

| OK | Mfg | Qty | Part Number       | Option Codes     | Part Description                                       | Option Descriptions               |
|----|-----|-----|-------------------|------------------|--|-----------------------------------|
| 1  | HAT | 4   | WURA-2448-L3SA    | (L3SA) ,OH-...   | RECT WORKSURFACE 24D X 48W                             | LAM_EDGE/STD CORE,W/WIREWA...     |
| 2  | HAT | 2   | LUTS-0024-C6UEB   | (C6UEB)          | TASK LIGHT,ADAPTABLE 24" WIDE                          | CHI CORD,UNDR CAB,BATWING LENS    |
| 3  | HAT | 2   | WUCA-3636-L3SANH4 | (L3SANH4) ,...   | CORNER,STRAIGHT 36 X 36                                | LAM_EDGE/STD,WRWY,NHND,24...      |
| 4  | HAW | 2   | SR-4              | ,OV- OAA ,TR-... | REGULAR SHELF 48"                                      | VIDENE/PUTTY/SURFACE 2(PUTTY)S... |
| 5  | HAW | 2   | PDX-24-JLN        | (JLN) ,TR- OAA   | FIXED PEDESTAL DRAWER 24"                              | 12/12 W/LOCK/SURFACE 1(PUTTY)S... |
| 6  | HAE | 2   | M211-1341         | ( ) (2) ,YW-...  | MB SYNC,PNEU/BK-LCK,POLY SHELL,VINYL ARMS,HARD CASTERS | STANDARD VERSION/WOOD SURFAL...   |
| 7  | HAW | 4   | LFRS-342-LROD     | (LROD) ,TR-...   | 3HI LATERAL FILE,RADIUS CASE 42 INCHES                 | LOCK,RCDSNG DOOR,DIVIDERS/SUR...  |
| 8  | HAW | 2   | HKTE-17-MP        | (MP) ,TR- OLU    | KEYBOARD TRAY,ERGONOMIC WRIST REST-17" TRACK           | W/MOUSE PAD,ERG REST,LOCK/SUR...  |
| 9  | HAW | 2   | DFRF-4            | ( ) ,C2- OAH...  | REG. FLIPPER DOOR - FABRIC 48"                         | WITH LOCK/LANDSCAPE, GRA...       |
| 10 | HAN | 4   | NMFF-6442-SN      | (SN) ,C2- O...   | ENH PREMISE MONO PANEL,64Hx24W                         | STL TOPCAP,NON-POWER/LANDSCA...   |
| 11 | HAN | 4   | NMFF-6424-SN      | (SN) ,C2- O...   | ENH PREMISE MONO PANEL,64Hx24W                         | STL TOPCAP,NON-POWER/LANDSCA...   |
| 12 | HAN | 3   | NMFF-6448-SN      | (SN) ,C2- O...   | ENH PREMISE MONO PANEL,64Hx48W                         | STL TOPCAP,NON-POWER/LANDSCA...   |
| 13 | HAN | 3   | NMFF-6436-SN      | (SN) ,C2- O...   | ENH PREMISE MONO PANEL,64Hx36W                         | STL TOPCAP,NON-POWER/LANDSCA...   |
| 14 | HAN | 4   | NLRF-64-SN        | (SN) ,C2- O...   | ENH END-OF-RUN CONNECTOR,FULL CONN,FULL COVER-FAB,64H  | STL TOPCAP/LANDSCAPE, GRA...      |
| 15 | HAN | 4   | NL2P-64-SN        | (SN) ,TR- O...   | ENH 2-WAY CONNECTOR,FULL CONN,FULL COVER-PNT,64H       | STL TOPCAP/SURFACE 1(PUTTY)SUR... |
| 16 | HAN | 5   | NLSS-64-SN        | (SN)             | ENH STRAIGHT CONNECTOR,FULL HGT,64 IN                  | STL TOPCAP                        |
| 17 | HAN | 2   | NL3P-64-SN        | (SN) ,TR- O...   | ENH 3-WAY CONNECTOR,FULL CONN,F...                     | STL TOPCAP/SURFACE 1(PUTTY)S...   |

## Vertical View Spreadsheet

| OK | Mfg | Qty | Part Number       | Option Codes                | Part Description                                       | Option Descriptions                             |
|----|-----|-----|-------------------|-----------------------------|--|---|
| 1  | HAT | 4   | WURA-2448-L3SA    | (L3SA) ,OH- OAA ,HP- OAA    | RECT WORKSURFACE 24D X 48W                             | LAM_EDGE/ LAMINATE/ PUTTY LAMINATE/ PUTTY       |
| 2  | HAT | 2   | LUTS-0024-C6UEB   | (C6UEB)                     | TASK LIGHT,ADAPTABLE 24" WIDE                          | CHI CORD,                                       |
| 3  | HAT | 2   | WUCA-3636-L3SANH4 | (L3SANH4) ,OH- OAA ,HP- OAA | CORNER,STRAIGHT 36 X 36                                | LAM_EDGE/ LAMINATE/ PUTTY LAMINATE/ PUTTY       |
| 4  | HAW | 2   | SR-4              | ,OV- OAA ,TR- OAA ,TR- OAA  | REGULAR SHELF 48"                                      | VIDENE/ PUTTY SURFACE 2/ PUTTY SURFACE 3/ PUTTY |
| 5  | HAW | 2   | PDX-24-JLN        | (JLN) ,TR- OAA              | FIXED PEDESTAL DRAWER 24"                              | 12/12 W/ SURFACE PUTTY                          |
| 6  | HAE | 2   | M211-1341         | ( ) (2) ,YW- ODD            | MB SYNC,PNEU/BK-LCK,POLY SHELL,VINYL ARMS,HARD CASTERS | STANDARD WOOD SURF W/ WALNUT F. CORD...         |

### Toggle Sequence:



## Vertical View Spreadsheet with "detail view"

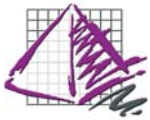
| Rec# | Mfg | Qty | Part Number | Tag 1 | Unit List | Extended | Weight | Extended |
|------|-----|-----|-------------|-------|-----------|----------|--------|----------|
| 9    | HAW | 2   | DFRF-4      | ROB   | 424.00    | 848.00   | 0.00   | 0.00     |

Part Description: REG. FLIPPER DOOR - FABRIC 48"

Option Codes: ( ) ,C2- OAH ,TR- OAA ,TR- OAA

Volume: 0.00, Taxable: 0.00

Zone 1



# Customizing Spreadsheet Views

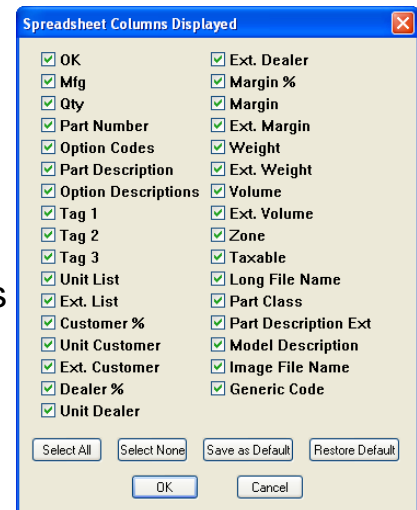
# ProjectSpec

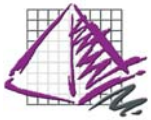
| OK | Mfg | Qty | Part Number         | Option Codes     | Part Description                                       | Option Descriptions               |
|----|-----|-----|---------------------|------------------|--|-----------------------------------|
| 1  | ✓   | HAT | 4 WURA-2448-LJ5A    | (LJ5A) ,0H- ...  | RECT WORKSURFACE 24D X 48W                             | LUM,EDGBND,STD CORE,W/WIREWA...   |
| 2  | ✓   | HAT | 2 LUTS-0024-C6UEB   | (C6UEB)          | TASK LIGHT,ADAPTABLE 24" WIDE                          | CHI CORD,UNDR CAB,BATWING LENS    |
| 3  | ✓   | HAT | 2 WUCA-3636-LJ5AN44 | (LJ5AN44) ,...   | CORNER,STRAIGHT 36 X 36                                | LUM,EDGBND,STD,WRWY,NHND,24...    |
| 4  | ✓   | HAW | 2 SR-4              | ,DV- 0AA ,T...   | REGULAR SHELF 48"                                      | V,ENE PUTTY SURFACE 2 PUTTY S...  |
| 5  | ✓   | HAW | 2 PDX-24-JLN        | (JLN) ,TR- 0...  | FIXED PEDESTAL DRAWER 24"                              | 12 12 W LOCK SURFACE 1 PUTTY ...  |
| 6  | ✓   | HAE | 2 M211-1341         | ( ) (2) ,YW- ... | MB SYNC,PNEU BK-LCK,POLY SHELL,VINYL ARMS,HARD CASTER5 | STANDARD VERSION WOOD SURFAC...   |
| 7  | ✓   | HAW | 4 LFRS-342-LR0D     | (LR0D) ,TR-...   | 3-HI LATERAL FILE,RADIUS CASE 42 INCHES                | LOCK,RCDNG DOOR,DIVIDERS SURF...  |
| 8  | ✓   | HAW | 2 HKTE-17-MP        | (MP) ,TR- 0LU    | KEYBOARD TRAY,ERGOMONIC WRIST REST-17" TRACK           | W HOUSE PAD,ERG REST,LOCK SUR...  |
| 9  | ✓   | HAW | 2 FDRF-4            | ( ) ,C2- 0AH...  | REG. FLIPPER DOOR - FABRIC 48"                         | WITH LOCK LANDSCAPE, GRA...       |
| 10 | ✓   | HAN | 4 NMFF-6442-5N      | (5N) ,C2- 0...   | ENH PREMISE MONO PANEL,64HX42W                         | STL TOPCAP,NON-POWER LANDSCA...   |
| 11 | ✓   | HAN | 4 NMFF-6424-5N      | (5N) ,C2- 0...   | ENH PREMISE MONO PANEL,64HX24W                         | STL TOPCAP,NON-POWER LANDSCA...   |
| 12 | ✓   | HAN | 3 NMFF-6448-5N      | (5N) ,C2- 0...   | ENH PREMISE MONO PANEL,64HX48W                         | STL TOPCAP,NON-POWER LANDSCA...   |
| 13 | ✓   | HAN | 3 NMFF-6436-5N      | (5N) ,C2- 0...   | ENH PREMISE MONO PANEL,64HX36W                         | STL TOPCAP,NON-POWER LANDSCA...   |
| 14 | ✓   | HAN | 4 NLRP-64-5N        | (5N) ,C2- 0...   | ENH END-OF-RUN CONNECTOR,FULL CONN,FULL COVER-FAB,64H  | STL TOPCAP LANDSCAPE, GRA...      |
| 15 | ✓   | HAN | 4 NL2P-64-5N        | (5N) ,TR- 0...   | ENH 2-WAY CONNECTOR,FULL CONN, FULL COVER-PNT,64H      | STL TOPCAP SURFACE 1 PUTTY SUR... |
| 16 | ✓   | HAN | 5 NLS5-64-5N        | (5N)             | ENH STRAIGHT CONNECTOR,FULL HGT,64 IN                  | STL TOPCAP                        |
| 17 | ✓   | HAN | 2 NL3P-64-5N        | (5N) ,TR- 0...   | ENH 3-WAY CONNECTOR,FULL CONN, F...                    | STL TOPCAP SURFACE 1 PUTTY S...   |

## Column Display

### Standard Spreadsheet

Much like Microsoft Excel, you can stretch or shrink each column by using placing the cursor over the column separator and dragging the columns. You can also click on the column heading to sort the columns in alphabetical or numerical order. If you right-click on a column heading you can drag the columns around to reorder the columns. You can also select multiple record lines and copy/paste into Excel.





# Options/ Auto Option/ Standard Options

ProjectSpec

**Catalog Reader - HAE - IMPROV SEATING**

File Edit View Bookmarks Zone Options Help

Auto OFF S<sup>td</sup> OFF Zone 1 V4

**M211-1341** Base: 792.00  
MB SYNC,PNEU/BK-LCK,POLY SHELL,VINYL Upcharge: 0.00  
ARMS,HARD CASTERS Unit: **792.00**

( ) STANDARD VERSION 0.00

Redo Accept BackUp Skip Change Single Option

**PLEASE SELECT UPHOLSTERY**

|     |                   |      |
|-----|-------------------|------|
| (1) | FABRIC UPHOLSTERY | 0.00 |
| (2) | WOOD SURFACE 1    | 0.00 |

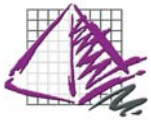
Table of Contents  
Manufacturers

Options Tools Window Help

- Clipboard Viewer F4
- Edit StandardOptions
- Create Standard Options From File
- Edit Options F5
- Edit Option Notes Alt+F5
- AutoOptions
- StandardOptions**
- OptionAll F10

Dealer \$ Margin \$ AutoDiscount: OFF Auto OFF S<sup>td</sup> OFF





# Auto Option

When on, AutoOption will automatically select a previously selected option if it is available again within the same part.

The most common example of this is when a panel can be optioned out with different fabrics on each side. You would select the first side of the panel as you normally would. When the second side becomes available, AutoOption will automatically select the same fabric. This works on all parts not just panels. If an option that is already selected becomes available again within that same record, AutoOption will select the previous select option again.

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 under Options/ AutoOptions where it can be toggled as well.

Auto Option

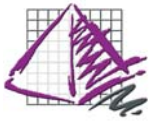
The screenshot displays the 'Catalog Reader - HAN - MOXIE/PREMISE' window. The main area shows a list of options for 'NMFF-6442-SN' with columns for description and price. The 'Options' menu is open, showing 'AutoOptions' checked. The status bar at the bottom indicates 'Auto ON'.

| Option | Description | Price         |
|--------|-------------|---------------|
| ,C2-   | LANDSCAPE,  | GRADE B 24.00 |
| 0AH    | HARVEST     | 0.00          |
| ,C2-   | LANDSCAPE,  | GRADE B 24.00 |
| 0AH    | HARVEST     | 0.00          |
| ,TR-   | RACEWAY     | 0.00          |
| 0AA    | PUTTY       | 0.00          |
| ,TR-   | TOPCAP      | 0.00          |
| 0AA    | PUTTY       | 0.00          |

Options menu items:

- Clipboard Viewer F4
- Edit StandardOptions
- Create Standard Options From File
- Edit Options F5
- Edit Option Notes Alt+F5
- AutoOptions
- StandardOptions
- OptionAll F10

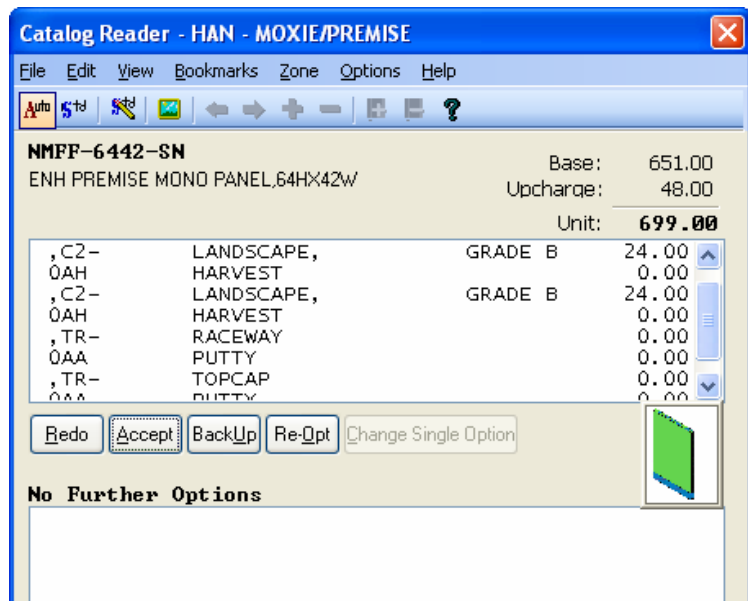
Status bar: Auto ON S<sup>td</sup> OFF Zone 1 V4



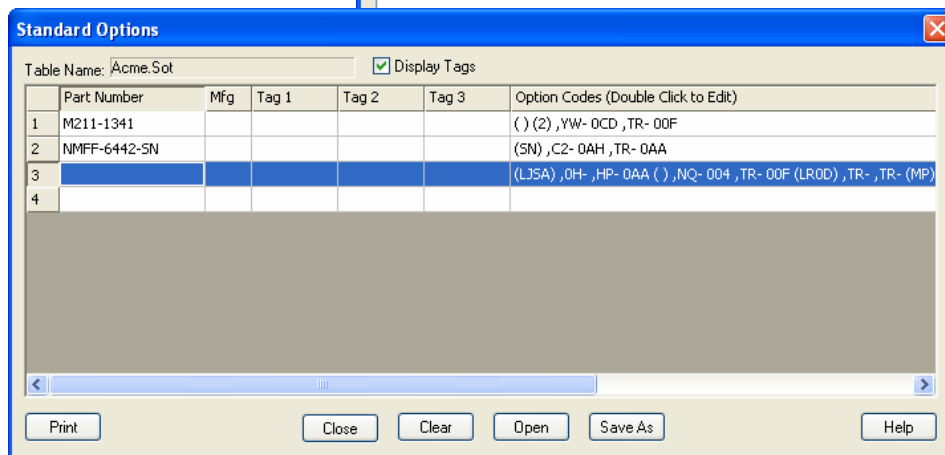
# Auto Option

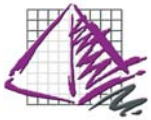
StandardOptions allows you to setup options that are used often and have the computer automatically select these options. When available, this will increase accuracy and speed of selecting options from an electronic catalog. Essentially, you build a list of desired options for ProjectSpec to use, and as you select options the selected options become the default.

For StandardOption to work, ProjectSpec has to know what options or option to look for. This can be done in several ways. We will cover the most common methods in this section.



Standard Option Table

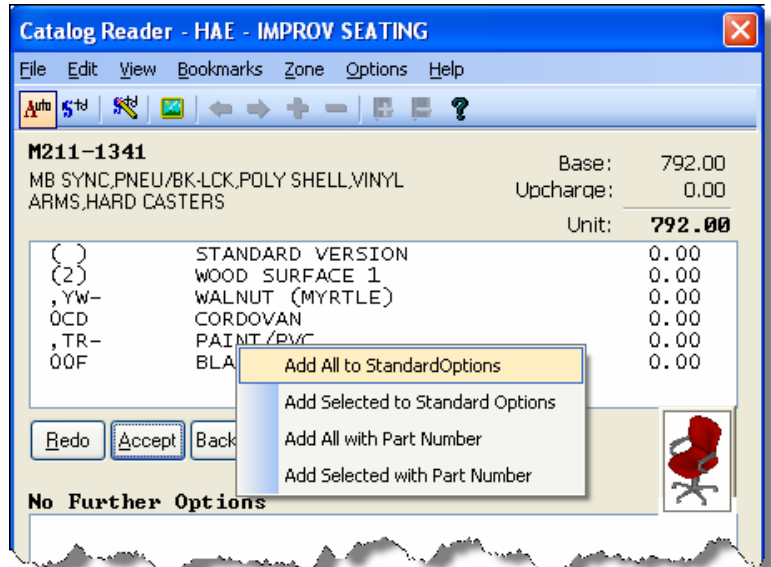




# Standard Option

1. Right click on the option in the top portion of the Catalog Viewer that you wish to make a Standard Option.
2. Choose "Add All to Standard Options" to add this set of options to the less specific or choose "Add All with Part Number" to create a specific Standard Option.

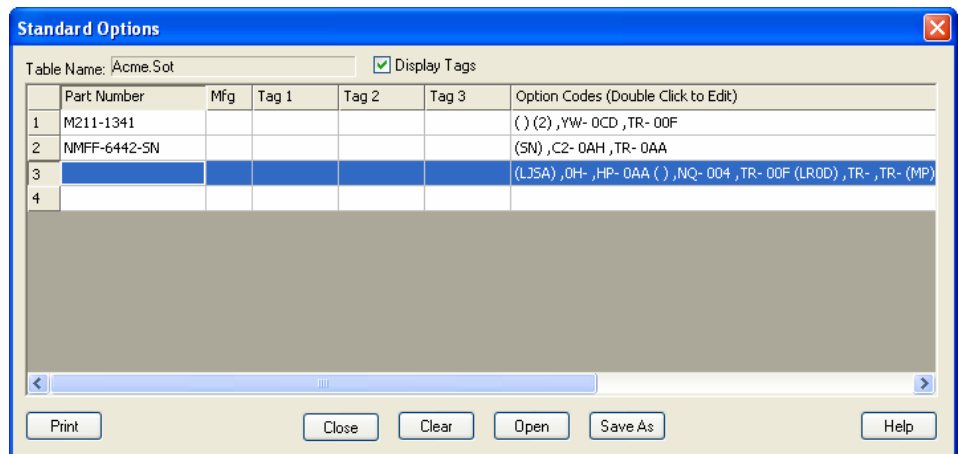
3. The Standard Option table will appear showing that option or options that you selected have been added. (NOTE: The part number in the Standard Option table can be changed to include Wild Cards such as an asterisk "\*" or question marks "?". Ex. WS-\* or WS-????-N)

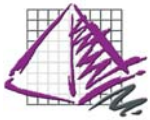


4. Repeat steps 2 and 3 until all options needed are added to the Standard Option Table.

5. Press the "Accept" button after all needed options are added.


6. Repeat all steps until all Standard Options are set up. In most cases, you can create and use Standard Option at the same time. By adding Standard Options and optioning out records with Standard Option on you can quickly option out a complete SIF file.



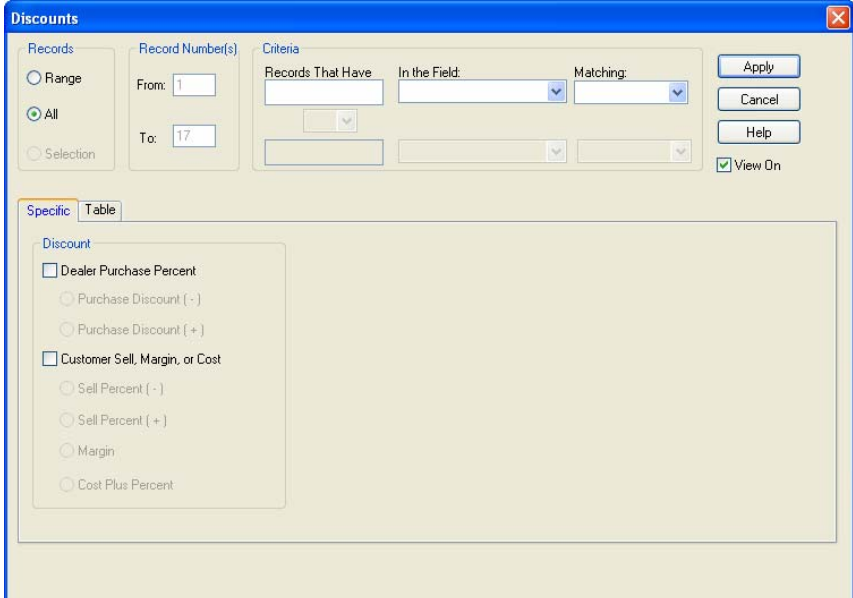


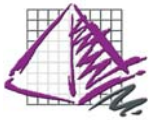
# Discounts “Specific”

Discounting will apply Purchase and/or sell discounts to records based on selection criteria in the active SIF file.

1. Select the Discount icon. 
2. Choose Specific.
3. Fill in your selection requirements.
4. Select Dealer Purchase Percent.
5. Then choose Purchase Discount (-) or (+). Minus will give you a lower Dealer price than List price. A positive will give you a Dealer price larger than List.
6. Type in desired discount, this can be a tiered number ( 50/10/5 unlimited tiers) or a percent (50.55352%).
7. Then 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 ( 50/10/5 unlimited tiers) or a percent (50.55352%).
10. Press the “Apply” button.

In most cases the criteria is a MFG code. If there are multiple MFG codes and each code has different discounts you will have to run this command more than once.

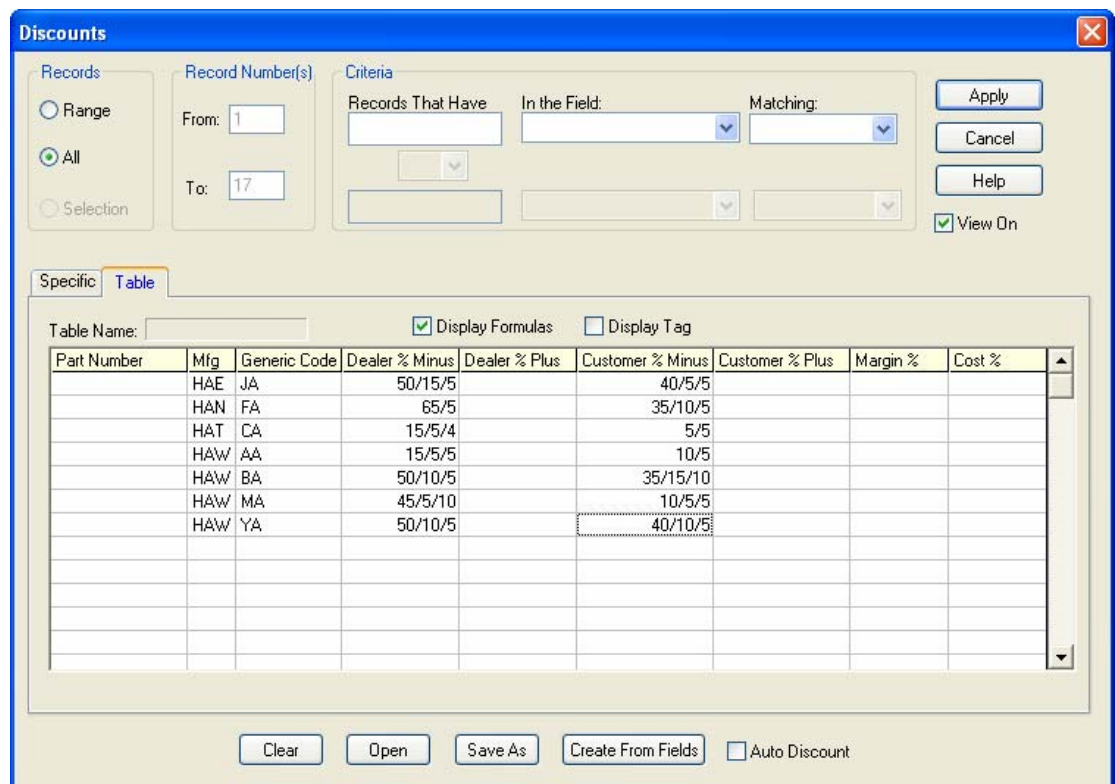
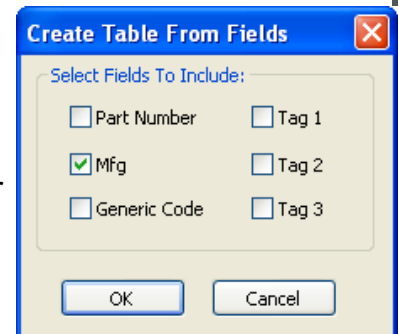


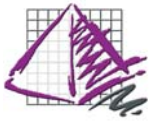


# Discounts "Table"

If you use the same discount structure often it may be of use to create a Discount Table. Using the table function allows you to discount a file with multiple discounts using different criteria in one easy step. In addition a Discount Table can be saved and used again.

1. Select the Discount icon.
2. Choose Table
3. Fill in your selection requirements.
4. Click on the button "Create from Fields". This automatically fills in all the catalog codes or other criteria that you have chosen from the opened SIF file. Or you can fill in the Discount Table that builds your structure.
5. Select Save As to save table for later use. (Optional)
6. Press the "Apply" button.





# File Types and extensions

## SIF (Standard Interchange Format) = .sif

A .sif file is an industry standard file format for passing data between programs. ProjectSpec, opens, modifies, and saves as in SIF format without having to convert file formats. You have the option to save your .sif anywhere on your local or network location.

## ProjectInfo (Customer Information File) = .cif

A .cif file stores the information processed through ProjectInfo. The .cif file is automatically stored in the same path location as the .sif for the opened file.

## Standard Option Table = .sot

The .sot is the stored information for your Standard Options. You have the option to save your .sot anywhere on your local or network location.

## Discount Table = .dis

A .dis file stores the discount information used in the Discount Table. You have the option to save your .dis anywhere on your local or network location.

## Printing

## Cover Page Template = .cov

## Detail Page Template = .cst

## Summary Template = .sum

You have the option to save your print templates anywhere on your local or network location.