

ProjectSpec Help

With Tips & How To's



## Function Keys

F1 = Help Guide

F2 = Catalog Viewer

Shift + F2 = Catalog Manager

F3 = Field Repeat

F4 = Replace

F5 = Edit Option

F6 = Join

F7 = Price Line

Shift + F7 = Price from Catalog

F8 = Merge

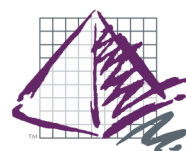
F9 = Expand Merge

F10 = Option All

F11 = Discount using Table

Shift + F11 = Discount using General Discounting

F12 = Cycle through Tabs





# Shortcut Keys

Ctrl + O = Open Project File

Ctrl + S = Save

Ctrl + P = Print

Ctrl + M = Move/Copy Column

Ctrl + W = Close

Ctrl + Z = Undo

Ctrl + R = Redo

Ctrl + F = Find

Ctrl + Alt + I = turn on/off ID, Line number and visual indicator image

Ctrl + Alt + P = Display only Pricing information

Ctrl + Alt + L = Load Layout

Ctrl + Alt + S = Sort

Ctrl + Alt + P = Project Info

Alt + A = Adjust List Price

Alt + R = Refresh

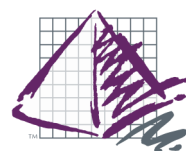
Alt + C = Copy Record

Alt + P = Paste Records

Alt + Del = Delete Records

Ctrl + Arrow up = Move Line Up

Ctrl + Arrow down = Move Line Down



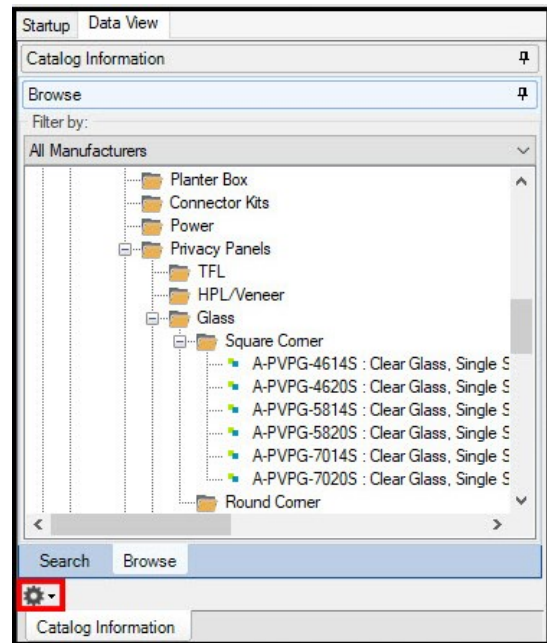
# Catalog Manager

The ProjectSpec5 Catalog Manager (Shift + F2) 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 on the Home Tab, View Tab, Price Tab, and by Clicking on the Settings Wheel in the docked Catalog Information window.

The Catalog Manager can also be found by clicking on the Settings Wheel in the docked Catalog Information window.



In the new Catalog Manager in Spec5, the user only needs to single-click a Manufacturer's tile to Activate/Deactivate a Manufacturer. A check mark will show up in the top right corner when the manufacturer is turned on, and disappear when the manufacturer is turned off.

The Manufacturer list will pull the downloaded Manufacturers straight out of ProjectNotify. The Manufacturers will show up in Alphabetical order.

To quickly jump to a specific Manufacturer, the user can click on the first letter of the Manufacturers name.

On the Manufacturers tile you will see the Manufacturer Logo, Name, Manufacturer Code, Current number of Catalogs and Legacy Catalogs

The Help Button will take the user to the Help Guide

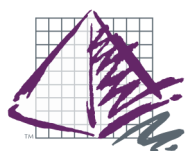
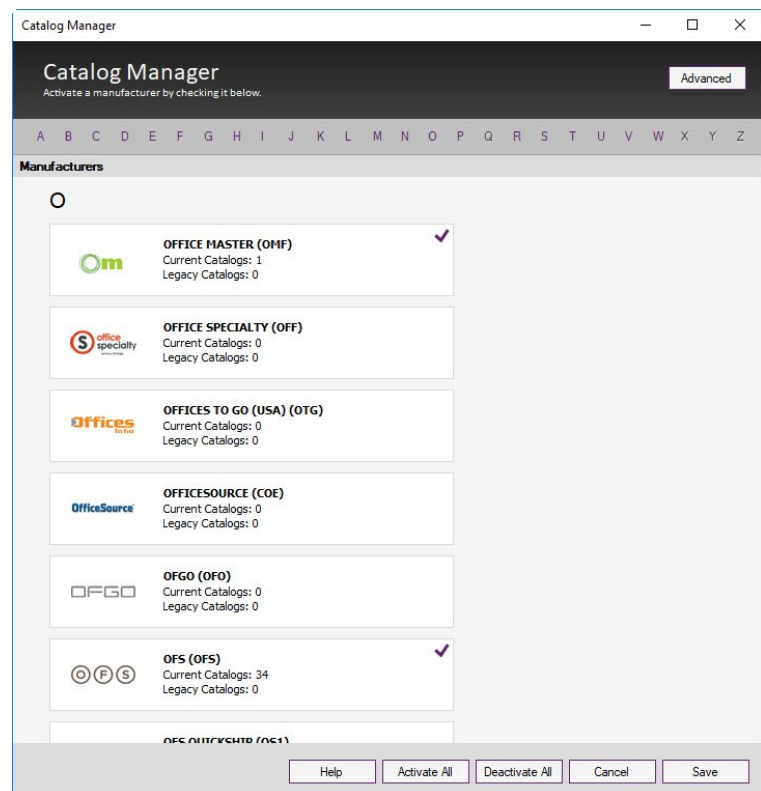
Activate All will turn on all Manufacturer Data

Deactivate All will turn off all Manufacturer Data

Cancel will close the Catalog Manager

Save will load the activated/deactivated Manufacturers

Advanced Catalog Manager will take the user to load both Legacy and current selected catalogs.



# Catalog Reader

## Glossary-

Click the section header to view more in-depth information about the section.

## Selected Options

The selected options section displays options that have already been selected for the item.

## Standard Options

This section allows you add or edit the Standard Options Table.

## Available Options

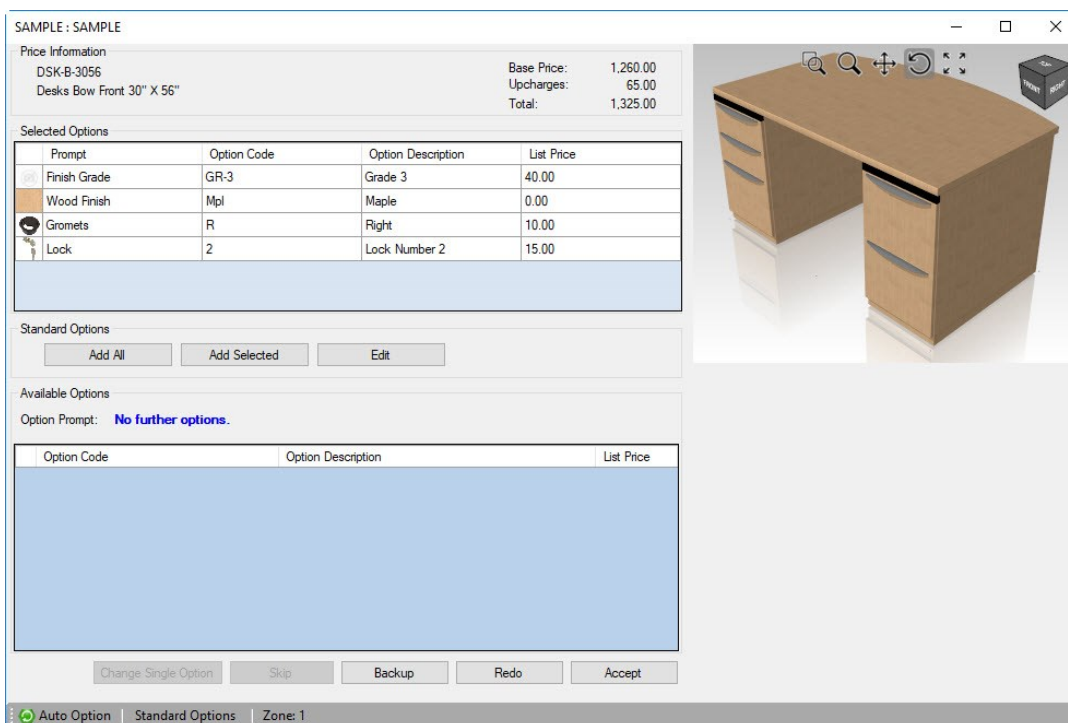
The available choice of options for the item are displayed here.

## Swatch Preview

The preview of the option will be displayed if one has been provided by the manufacturer for the selected option.

## 3D Preview

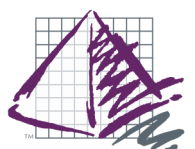
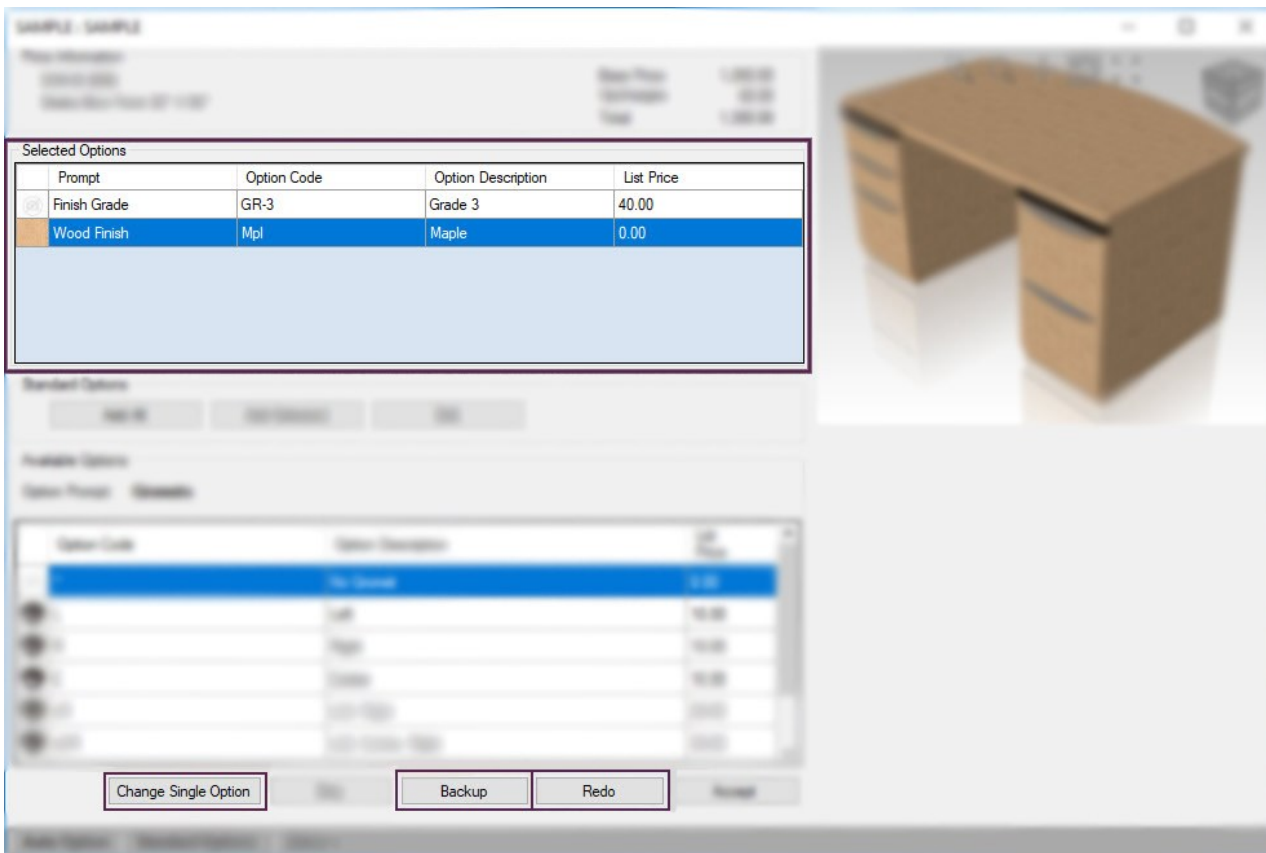
This is a "live" view of the selected objects 3D AutoCAD model.



# Catalog Reader

Once you have selected an Available Option by double-clicking your choice, the selected option moves to this section in descending order. You can modify or edit these selected options with the following methods.

- **Backup** - This allows you to backup or "Undo" each option in order from last selection to first selection.
- **Redo** - The Redo button will clear all selected options and allow you to start from the beginning.
- **Change Single Option** - You must first left-click an option listed in the Selected Options Section. Once one option has been selected, the "Change Single Option" button will be available to choose an alternate choice. Keep in mind, that if you choose an option at the beginning of an option structure, you may be forced to select additional options to fully option the item.
- **Edit Options** - This will be done from the Spreadsheet or Details screen. You will be able to manually edit the Option Prompts, Codes, Descriptions, and Price from that section.



# Catalog Reader

This is where the options available for this part show up.

- **Option Prompt:** Tells you where the finish will be applied.
- **Option Code:** This will show the option code, as well as a swatch of the material (if supplied by the manufacturer)
- **Option Description:** Description of the Option
- **List Price:** Shows you the additional charge for the selected option
- **Change Single Option:** Will let you change the option selected in the Selected Options window above.
- **Skip:** Lets you skip the current option
- **Backup:** Lets you backup to the option before.
- **Redo:** Lets you clear all selected options and allow you to start from the beginning

The screenshot displays the 'Catalog Reader' software interface. It features two main windows for selecting options. The top window, titled 'Selected Options', contains a table with the following data:

Prompt	Option Code	Option Description	List Price
Finish Grade	GR-3	Grade 3	40.00
Wood Finish	Mpl	Maple	0.00

The bottom window, titled 'Standard Options', contains a table with the following data:

Option Code	Option Description	List Price
Wnt	Walnut	0.00
Mpl	Maple	0.00
Chr	Cherry	0.00

Below the tables are buttons for 'Change Single Option', 'Skip', 'Backup', 'Redo', and 'Accept'. To the right of the windows is a 3D model of a dark brown desk and a close-up image of a light-colored wood grain.

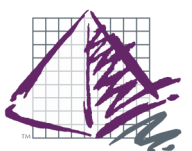
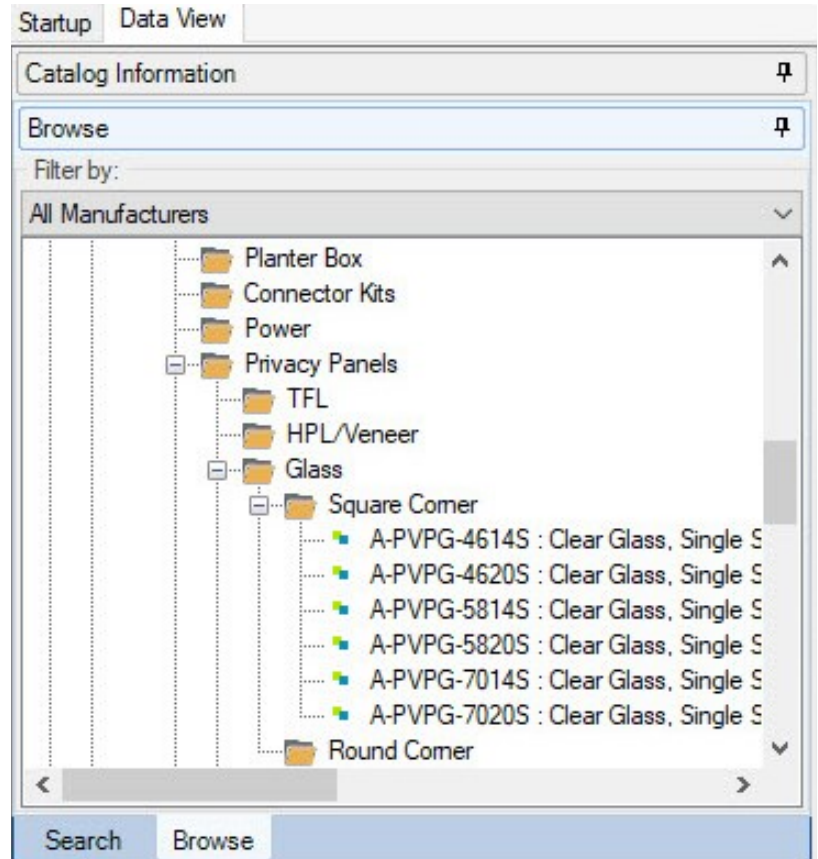




# Creating a Record Line

The user can browse through the catalog reader (docked on the left side of the screen) by double clicking through.

Once the user gets to a part number, they can double click on the part number to add options, or click and drag the part number into the project.





# Creating a Record

The user can also type in a part number in the Part Number field in the spreadsheet and press F2 to search for the part number.

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

The user can also type the part number and wildcard in the Search tab.

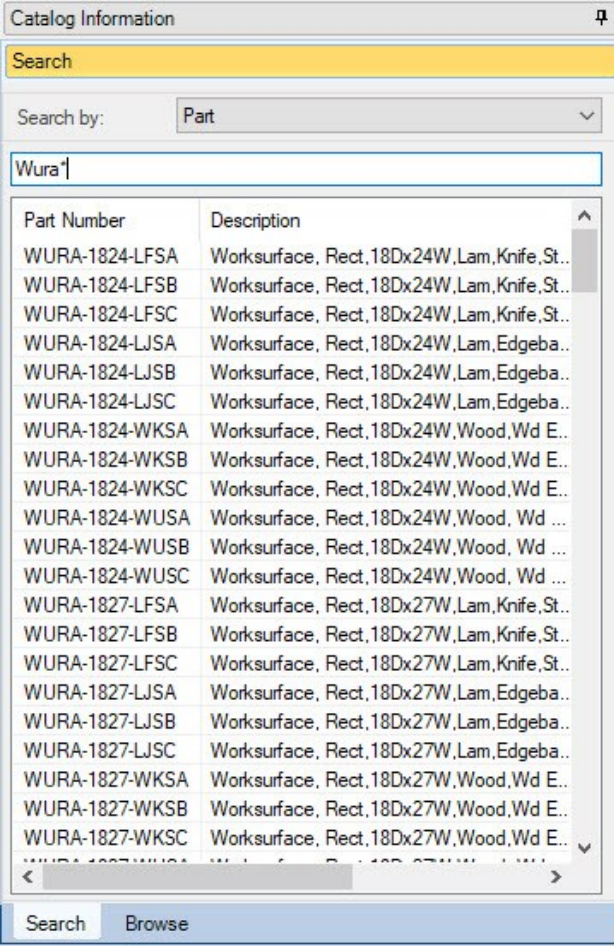
## Examples of a WILDCARD:

Full part number for a worksurface would be **WURA-2436-LJSA**.

You could do **WURA-\*** and find all sizes and options for that part.

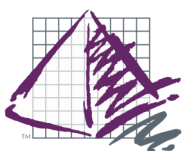
You could do **WURA-\*-LJSA** to find all sizes for that part with those options.

You could do **WURA-24\*-LJSA** to find all 24" deep worksurfaces with those options.



The screenshot shows a software window titled "Catalog Information" with a search interface. A yellow "Search" button is at the top. Below it, a dropdown menu is set to "Part". A text input field contains "Wura\*". Below the input field is a list of search results with two columns: "Part Number" and "Description". The results list various worksurface part numbers (e.g., WURA-1824-LFSA, WURA-1824-LFSB, etc.) and their corresponding descriptions. At the bottom of the window, there are "Search" and "Browse" buttons, and a status bar indicating "Results: 200".

Part Number	Description
WURA-1824-LFSA	Worksurface, Rect, 18Dx24W, Lam, Knife, St...
WURA-1824-LFSB	Worksurface, Rect, 18Dx24W, Lam, Knife, St...
WURA-1824-LFSC	Worksurface, Rect, 18Dx24W, Lam, Knife, St...
WURA-1824-LJSA	Worksurface, Rect, 18Dx24W, Lam, Edgeba...
WURA-1824-LJSB	Worksurface, Rect, 18Dx24W, Lam, Edgeba...
WURA-1824-LJSC	Worksurface, Rect, 18Dx24W, Lam, Edgeba...
WURA-1824-WKSA	Worksurface, Rect, 18Dx24W, Wood, Wd E...
WURA-1824-WKSB	Worksurface, Rect, 18Dx24W, Wood, Wd E...
WURA-1824-WKSC	Worksurface, Rect, 18Dx24W, Wood, Wd E...
WURA-1824-WUSA	Worksurface, Rect, 18Dx24W, Wood, Wd ...
WURA-1824-WUSB	Worksurface, Rect, 18Dx24W, Wood, Wd ...
WURA-1824-WUSC	Worksurface, Rect, 18Dx24W, Wood, Wd ...
WURA-1827-LFSA	Worksurface, Rect, 18Dx27W, Lam, Knife, St...
WURA-1827-LFSB	Worksurface, Rect, 18Dx27W, Lam, Knife, St...
WURA-1827-LFSC	Worksurface, Rect, 18Dx27W, Lam, Knife, St...
WURA-1827-LJSA	Worksurface, Rect, 18Dx27W, Lam, Edgeba...
WURA-1827-LJSB	Worksurface, Rect, 18Dx27W, Lam, Edgeba...
WURA-1827-LJSC	Worksurface, Rect, 18Dx27W, Lam, Edgeba...
WURA-1827-WKSA	Worksurface, Rect, 18Dx27W, Wood, Wd E...
WURA-1827-WKSB	Worksurface, Rect, 18Dx27W, Wood, Wd E...
WURA-1827-WKSC	Worksurface, Rect, 18Dx27W, Wood, Wd E...



# Creating a Record Line

The user can search for a Part by Part description.

In the Search, click the drop-down and select description.

It is not a smart search, if the manufacturer has a chair labeled CHR, then the search must be for CHR to produce results.

Auto fill will work once 3 characters are entered.

Catalog Information

Search

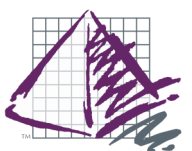
Search by: Description

Boos

Part Number	Description
F49056	Boost, Hex Ottoman Small, 24 x 21 x 17.75
F49056-R	Boost, Hex Ottoman Small w/Removable T...
F49057	Boost, Trap Ottoman Small, 20.75 x 20.5 x ...
F49057-R	Boost, Trap Ottoman w/Removable Top S...
F49058	Boost, Round Ottoman Small, 20.75 x 20.7...
F49058-R	Boost, Round Ottoman w/Removable Top ..
F49058S	Boost Mini, Round Ottoman, 20.75x20.75x...
F49059	Boost, Square Ottoman Small, 20.75 x 20.7...
F49059-R	Boost, Square Ottoman w/Removable Top...
F49156	Boost, Hex Ottoman Medium, 29.25 x 25.7...
F49156-R	Boost, Hex Ottoman Medium w/Removabl...
F49157	Boost, Trap Ottoman Medium, 25.5 x 25.25...
F49157-R	Boost, Trap Ottoman w/Removable Top M...
F49158	Boost, Round Ottoman Medium, 25.5 x 25....
F49158-R	Boost, Round Ottoman w/Removable Top ..
F49159	Boost, Square Ottoman Medium, 25.5 x 25...
F49159-R	Boost, Square Ottoman w/Removable Top...
F49256	Boost, Hex Ottoman Large, 41.75 x 36 x 17...
F49257	Boost, Trap Ottoman Large, 36 x 35.5 x 17...
F49258	Boost, Round Ottoman Large, 36 x 36 x 17...
F49258S	Boost Mini, Round Ottoman, 35x35x12.5

Search Browse

Results: 95





# Creating a Record Line




The user can also hand type in a line that does not exist from a manufacturer catalog.

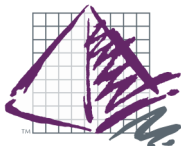
To do so, the User will double click in a cell and start typing.  
The user has the ability to add options, option prompts, descriptions and charges as well.

ProjectSpec5 will always have a blank line at the bottom of the project.

The user can insert a line by Right-clicking on the Project and selecting “Insert Line”.

While it is not mandatory, it is recommended that the user makes the new line a “Custom” line to prevent Errors from showing up. To do so, select the line and Right-Click or on the Price Tab select Make Custom.

33		CHG	40	DESIGN TIME	Labor to create fit plans, confirm field dimensions and finishes, create as-built drawing with current inventory of product, create furniture layout with renderings and installation drawings.	
34		CHG	18	PROJECT MANAGEMENT	Labor to visit site and confirm existing conditions, coordinate installation and project closeout.	
35		CHG	1	LABOR (RECEIVING, INSTALLATION, ETC.)	Labor to receive, deliver and install workstations, private offices, colab zones & work room for 3 people during regular business hours.	
*						



# ProjectSpec5

## Spreadsheet

The default View. This is where most users will create and edit their project.

The screenshot displays the ProjectSpec5 application interface. The top menu bar includes File, Home, View, Price, Options, and Tools. Below the menu is a toolbar with icons for various functions like Open, Save, Print, Cut, Copy, Paste, Undo, Redo, Catalog Manager, Picture Search, Find, Errors, Replace, Quick Search, Join, Merge, Expand Merge, Move/Copy Column, Sort, Sort Favorite, Sort Remove, and Sort. The main window is divided into several panes. On the left, there is a 'Catalog Information' pane with a 'Browse' button and a 'Filter by' dropdown. Below this is a 'Preview' pane showing a 3D rendering of a desk. The central 'Spread Sheet' pane contains a table with the following columns: Status, Image, Manufacturer Co, Manufacturer De, Catalog Code, Quantity, Part Number, and Part Description. The table lists seven items, each with a green checkmark in the Status column and a small image in the Image column. The bottom status bar shows pricing information: List Price \$194,597.00, Customer Price \$103,838.35, Dealer Price \$91,007.96, and Margin \$12,830.39. It also indicates the Development Version and Total Records: 35.

Status	Image	Manufacturer Co	Manufacturer De	Catalog Code	Quantity	Part Number	Part Description
✓		OFS	OFS	IG2	1	5-2248BR2	Impulse G2 22x48 Bridge
✓		OFS	OFS	IG2	2	5-3619HDW2-2	Impulse G2 36x18.5 2-Door Wallmount Organizer
✓		OFS	OFS (COMPLEI	IG2	1	5-3622LF2-2	Impulse G2 36x22 2-Drawer Lateral File
✓		OFS	OFS	IG2	1	5-3643BC3	Impulse G2 36x42.5 Bookcase Organizer
✓		OFS	OFS	IG2	1	5-7222FCRL2	Impulse G2 72x22 Left Full Pedestal Credenza
✓		OFS	OFS (COMPLEI	IG2	1	5-7236FRPD2	Impulse G2 72x36 Right Full Pedestal Desk
✓		OFS	OFS (COMPLEI	OST	1	68017	Madrid 26.5x26.25x45.25-49 High Back Swivel

List Price \$194,597.00 | Customer Price \$103,838.35 % 46.639 | Dealer Price \$91,007.96 % 53.233 | Margin \$12,830.39 % 12.356 | Development Version | Total Records: 35

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



# ProjectSpec5

## Detail View

This allows the user to see a detail view of individual parts based on specific criteria.

Details

Filter By:

Parts

Part Information 35

5-2248BR2

5-3619HDW2-2

5-3622LF2-2

5-3643BC3

5-7222FCRL2

5-7236FRPD2

68017

75017

75017

75017

DESIGN TIME

ENW-1619MP

ENW-1619MP

ENW-1619MP

ENW-1619MP

ENW-1619MP

ENW-1619MP

ENW-240111TC6-48

ENW-240111TC6-48

ENW-240111TC6-48

ENW-4824BR

ENW-4824BR

ENW-4824BR

ENW-8345CU

ENW-8345CU

ENW-8345CU

ENW-ATRI48TKA6

ENW-ATRI48TKA6

ENW-ATRI48TKA6

ENW-PVPA-47.63/12.81

ENW-PVPA-47.63/12.81

Part Details

Grouping Information

Item Information

Status

Part Number

Part Description

✓

ENW-ATRI48TKA6

Eleven Toolrail Kit-use w/ 1/4D privacy panels-(7) 48" Toolrails

Quantity

1

Special Number

Manufacturer

OFS

OFS (COMPILED FOR 7/2017)

Generic Code

Catalog

OFE

Catalog Date

4/15/2019 1:24:21 PM

Prompt

Code

Description

Price

NOT DEFINED

??

INCOMPLETE

0.00

Option Swatches

Tag Information

Tag1

OFFICE 126

Tag3

Tag5

Tag2

FURNITURE

Tag4

Pricing Information

Base List

2,433.00

Sell

1,066.23

Purchase

906.29

Margin

0.00

Total Option List

0.00

Sell %

-56.17647

Purchase %

-62.75000

Margin %

0.00000

Total List

2,433.00

Ext. List

2,433.00

Ext. Sell

1,066.23

Ext. Purchase

906.29

Ext. Margin

0.00

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



# ProjecSpec5 Spreadsheet Views

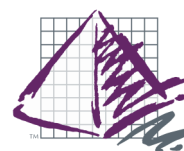
## Reporting

This is a quick way to see quick reports. This will quickly print or save as PDF. These cannot be edited today, but that feature is coming in a future release.

The screenshot displays the ProjecSpec5 Reporting interface. On the left, there is a sidebar with a 'Catalog Information' panel and a 'Preview' panel. The main area shows a table titled 'Option Summary Sorted by Description'. The table has three columns: 'Option Description', 'Option Code', and 'Option Prompt'. The table lists various options such as 'Black', 'Black Grommet', 'Felt Top', 'Finished Back', 'Flair - 1.1875"', 'Gold', 'Grade 4 Vinyl', 'Grade 7 Fabric', 'Grip', 'Grommet Center', 'Grommet Right', 'Hinged Access Panel', 'INCOMPLETE', 'Key Specific Locking', 'Linen (Clear Oak)', 'Locking, Key Specific (must include lock core order form)', 'Mocha (Mocha Cherry)', 'Pure White', 'Quartered', 'Square (3mm PVC)', 'TFL', 'TFL Solid Color', 'TFL Solid Color with 3mm PVC Edge', 'TFL/3DL/HPL-PVC Edge', 'Veneer', 'Veneer - Quartered', 'White Full Glass', and 'White Full Gloss'. The table is sorted by description, and the options are listed in ascending order of their description.

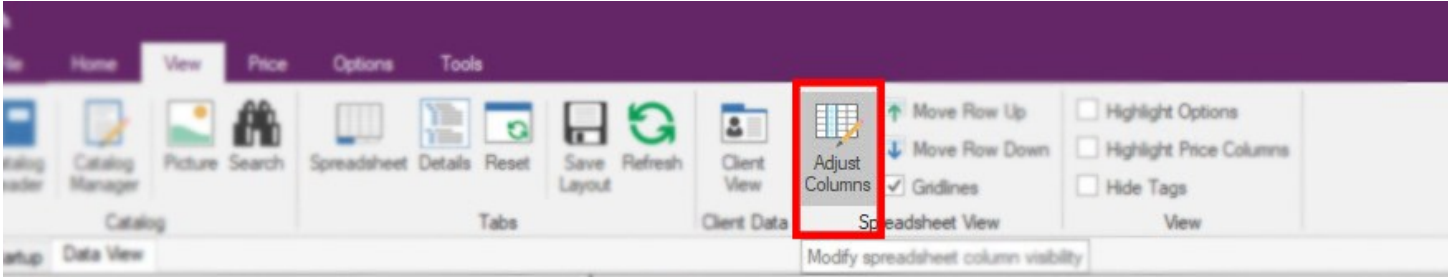
Option Description	Option Code	Option Prompt
Black	BLK	Top Drawer
Black Grommet	LI	Grommet Color
Felt Top	Felt	Felt
Finished Back	LX	Back
Flair - 1.1875"	DQ	Edge
Gold	SGLD	Pull Finish
Grade 4 Vinyl	4	Grade
Grade 7 Fabric	7	Tackboard/VFBoard Fabrics
Grip	Grip	Pull
Grommet Center	G3	Grommet, for Returns and Bridges
Grommet Right	G2	Grommet
Hinged Access Panel	FZ	Back
INCOMPLETE	??	NOT DEFINED
Key Specific Locking	H2X	Lock
Linen (Clear Oak)	MRO	Finish
Locking, Key Specific (must include lock core order form)	H2X	Key
Mocha (Mocha Cherry)	MMC	Finish, Quartered Veneer/HPL
Pure White	RW2	TFL Solid Color
Quartered	BAZ	Grain Pattern
Square (3mm PVC)	EY	Edge Shape
TFL	T	Material
TFL Solid Color	~S	TFL Finish (Pedestal)
TFL Solid Color with 3mm PVC Edge	~TFL/S	Worksurface and Edge Type
TFL/3DL/HPL-PVC Edge	T	Material
Veneer	V	Material
Veneer - Quartered	~V	Veneer
White Full Glass	CSJ	Door Type
White Full Gloss	~	Door Insert/Color

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





# Customizing Spreadsheet Views

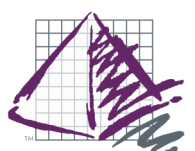
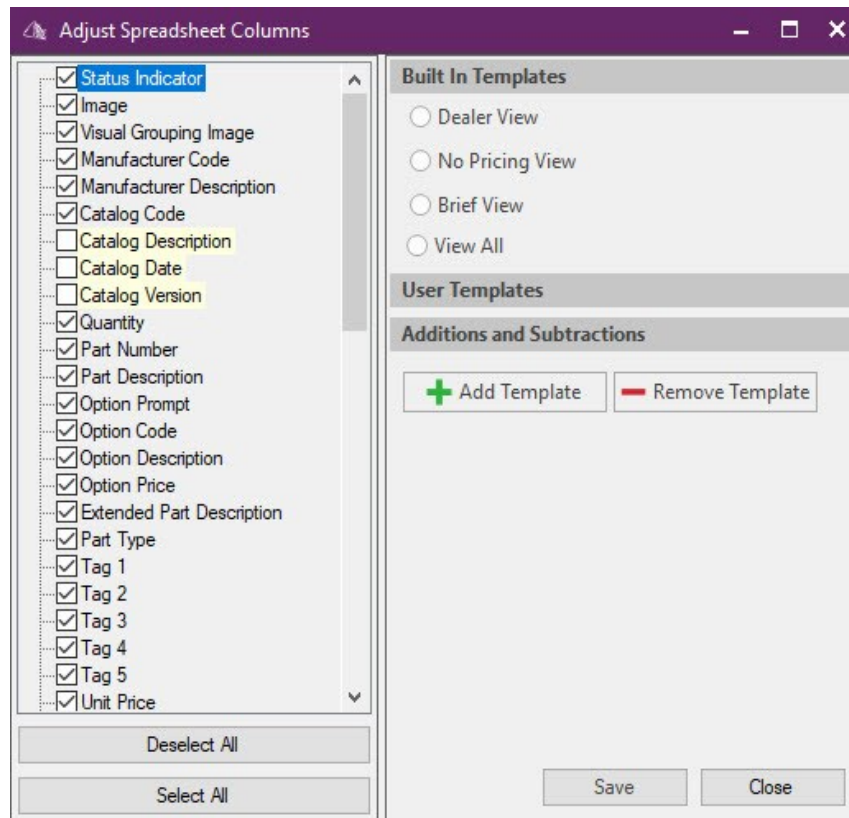


## Adjust Columns

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 left-click and hold on a column heading you can drag the columns around to reorder the columns.

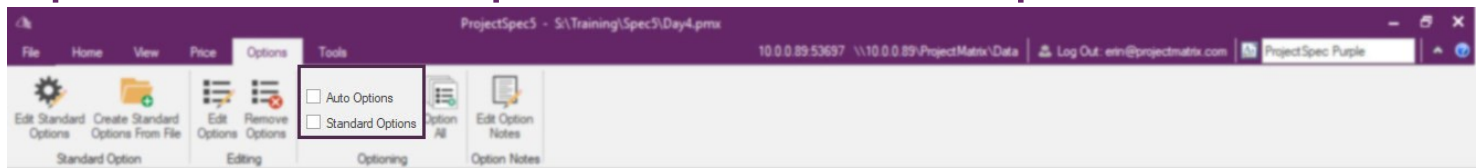
In Adjust Columns the user can use one of the pre-defined templates for turning columns on/off. They can also create their own.

To load a template, the user will click SAVE after selecting the template they wish to view.





# Options / Auto Option / Standard Options



## Standard Options

Standard Options allows the user to build a table of frequently used options from which ProjectSpec can automatically option parts.

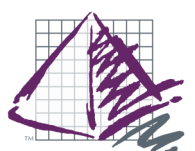
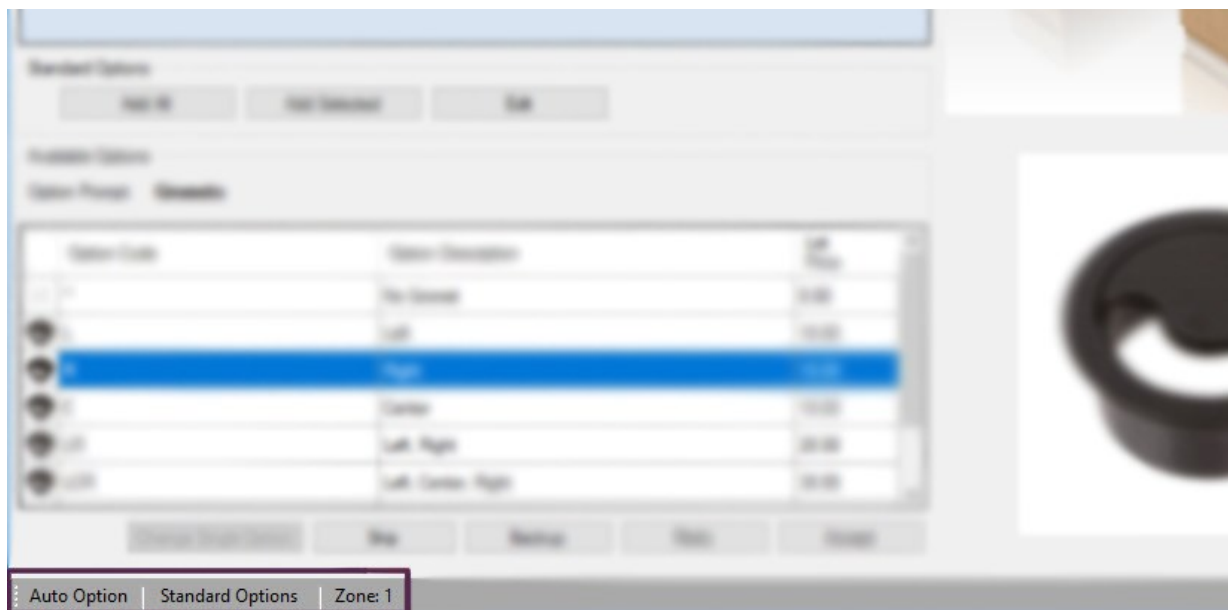
This can help the user to option an entire SIF file quickly and accurately by automatically using the same options on records that contain the same Part Number, Mfg code, Cat Code or Tag(s).

## Auto Options

AutoOption is a feature used while Optioning a part. 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.



# Standard Options

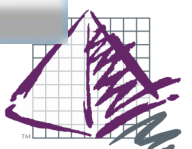
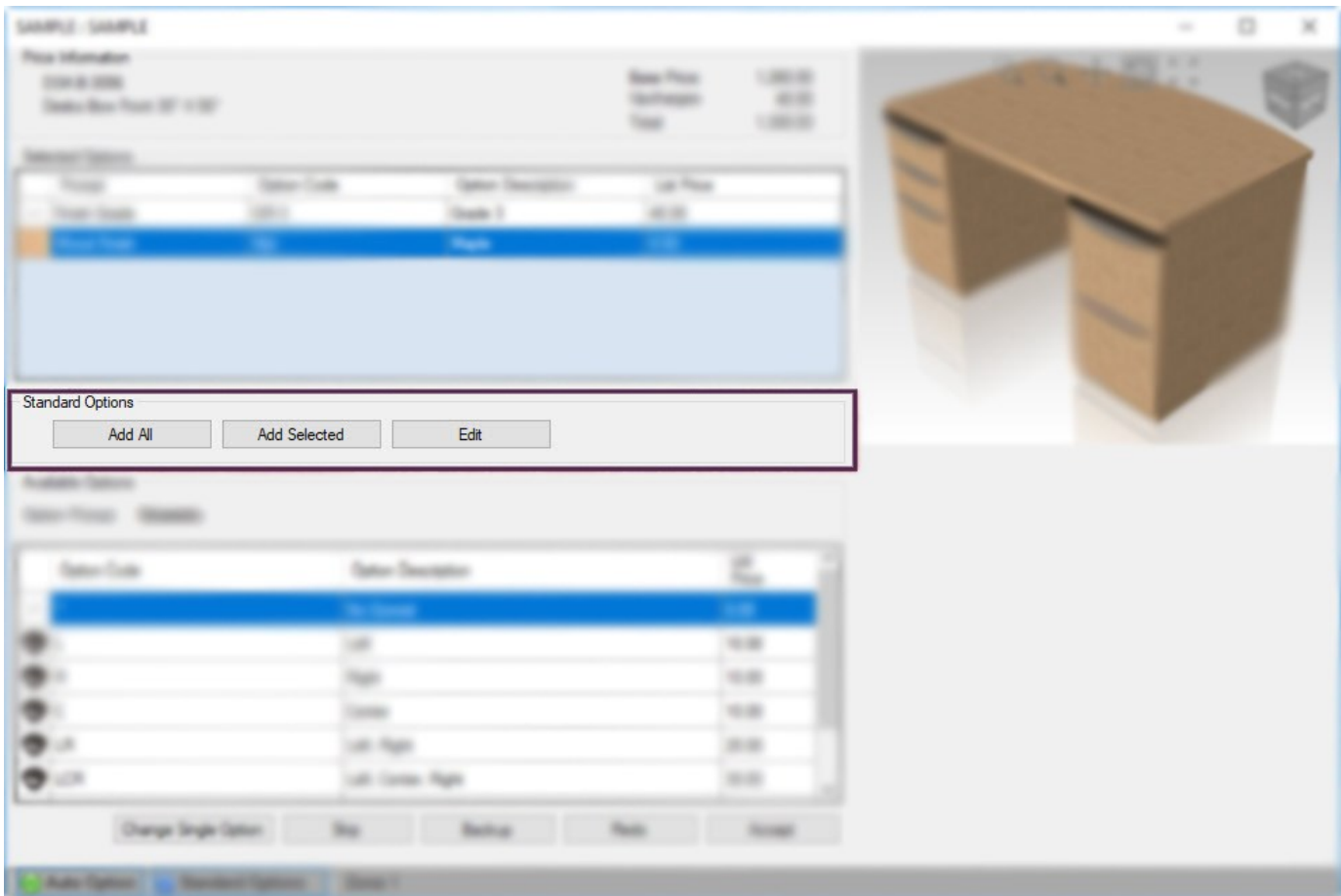
StandardOption allows the user to build a table of frequently used options from which ProjectSpec can automatically option parts. This can help the user to option an entire SIF file quickly and accurately by automatically using the same options on records that contain the same Part Number, Mfg code,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

StandardOption can be toggled on or off by selecting the checking "Standard Options" in the Options Ribbon. It can also be toggled on and off in status bar of the catalog reader.

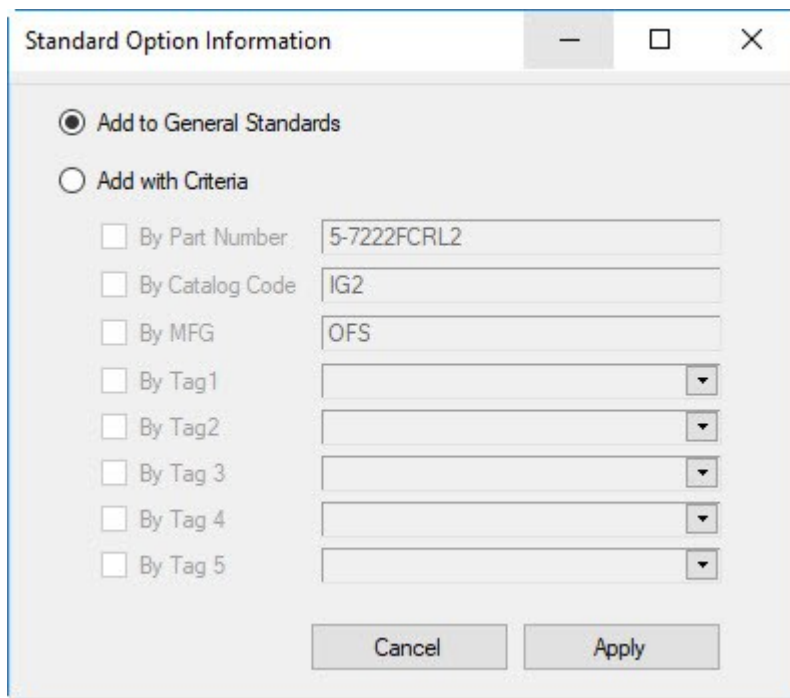
StandardOptions was under utilized in the previous version of ProjectSpec. First, the way to add options was hidden behind a right-click menu which prevent many users from even knowing it was there. Secondly, the StandardOption table stayed loaded from project to project. This caused concerns from users afraid they would add the incorrect options to the wrong project. Both of these problems have been resolved in this version.



# Standard Options

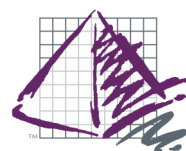
## UPDATES/ENHANCMENTS

1. Standard Options has a new set of buttons in plain sight directly below the Selected Options table.
2. New projects will load with a blank Standard Option table. Previous projects will load with the standards previously used for that project. You can still save and load if you want to share standards between projects, computers, or users.
3. You can now add rules to the options before they are added to the table, so the user does not need to edit the data after it has been entered.



The image shows a Windows-style dialog box titled "Standard Option Information". It has standard window controls (minimize, maximize, close) in the top right corner. The dialog contains two radio buttons: "Add to General Standards" (which is selected) and "Add with Criteria". Below the "Add with Criteria" option, there are seven checkboxes, each followed by a text input field or a dropdown menu. The first three are "By Part Number" (with text "5-7222FCRL2"), "By Catalog Code" (with text "IG2"), and "By MFG" (with text "OFS"). The remaining four are "By Tag 1" through "By Tag 5", each followed by a dropdown menu. At the bottom of the dialog are two buttons: "Cancel" and "Apply".

Option	Value
<input checked="" type="radio"/> Add to General Standards	
<input type="radio"/> Add with Criteria	
<input type="checkbox"/> By Part Number	5-7222FCRL2
<input type="checkbox"/> By Catalog Code	IG2
<input type="checkbox"/> By MFG	OFS
<input type="checkbox"/> By Tag 1	
<input type="checkbox"/> By Tag 2	
<input type="checkbox"/> By Tag 3	
<input type="checkbox"/> By Tag 4	
<input type="checkbox"/> By Tag 5	



# Standard Options

For each entry, the StandardOption table has fields for Part Number, Mfg code, Cat Code and user defined Tags. 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.

## Steps to creating a standard option

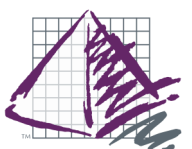
1. Select available options in the catalog reader.
2. Choose which options you want to add:
  1. "Add All" Selected Options
  2. CTRL+Left-Click desired options and choose "Add Selected"
3. Choose how you want the selected option(s) to be added to the table.
  1. "Add to General Standards" - This means if the option code and description are available on another item, regardless of the part or catalog, it will apply the options.
  2. "Add with Criteria" - This means that the option will ONLY be added if it matches the rules you have specified in the table by placing a check in the corresponding rule type. NOTE: A wildcard \* may be used when editing the rules.

Standard Option Data Table

Table Name:  ☒ Display Tags ☒ Tree View

Part Number	Options	Manufacturer Code	Catalog Code	Tag 1	Tag 2	Tag 3	Tag 4	Tag 5	Option Code	Option Desc
	GENERAL-APPLICATION									
									T	TFL
									~S	TFL Solid Co
									RW2	Pure White (
									X9	No Felt
									NM	Locking
									POLR	Polar
									V	Veneer/HPL
									~S/V	Studio Vene
									SVC	Silver Grey (
									B6P	Square (3mm
									B5A	Flat Cut
									MMC	Mocha (MM
									DQ	Flair - 1.1875

Clear Open SaveAs Close

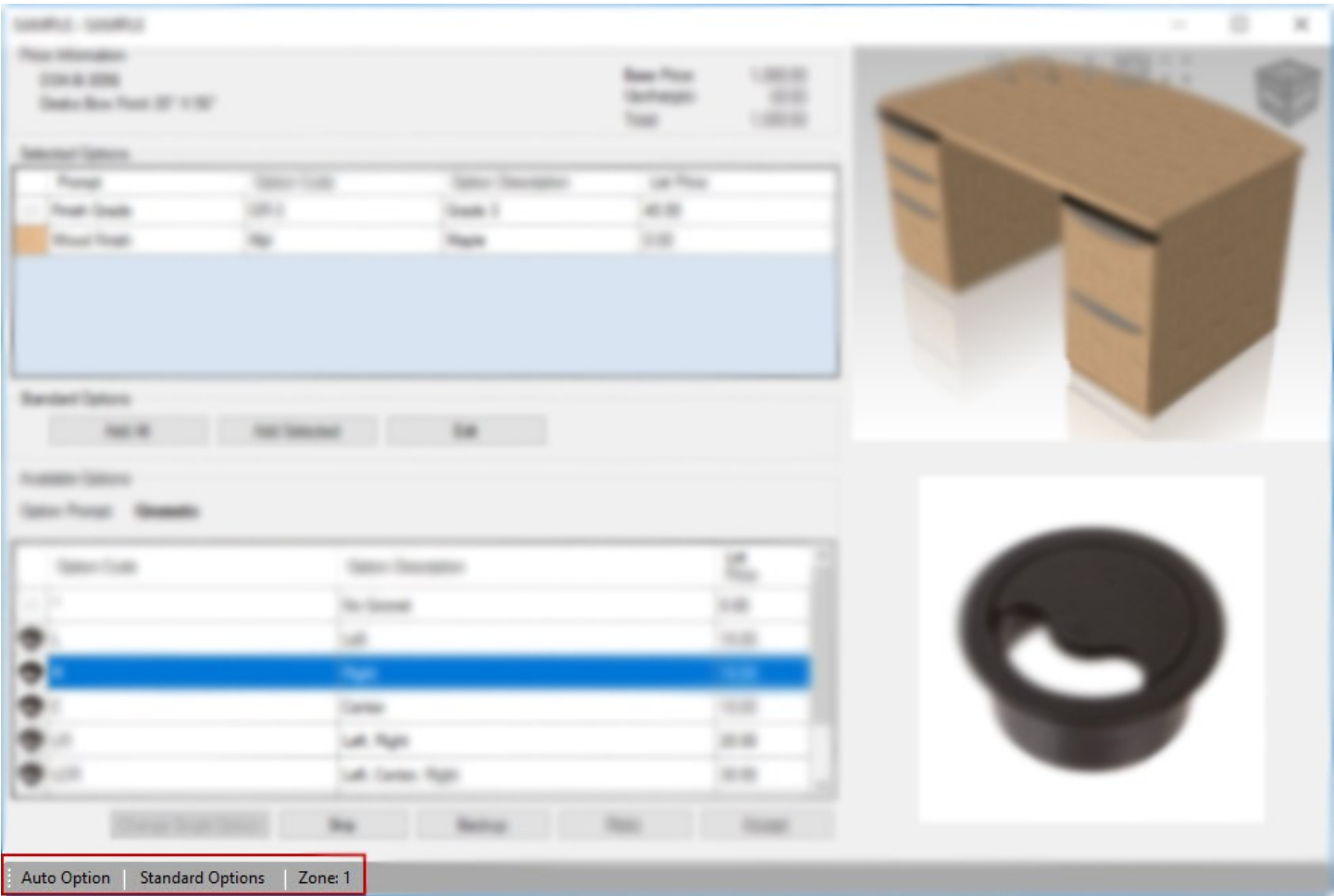


# Auto Option

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.

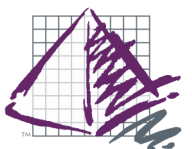
AutoOption allows ProjectSpec to reapply your choice automatically on a single part. For example, if you select a certain color fabric, AutoOption will automatically make sure all other fabric color selections for the same part are identical. This only applies to the option selections on a single record, 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 Options Tab by clicking the Check box.

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.



# Discount General

1. Click the General icon.
2. Fill in your selection requirements in the top half of the dialog box.
3. In the Dealer Discounts section 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.
4. Type in desired discount, this can be a formula based number (e.g. 50/10/5) or a percent (e.g. 50.55352%).
5. In the Customer Discounts section choose:
  - Sell Percent (-) Minus will give you a lower Dealer price than List price
  - Sell Percent (+) A positive will give you a Dealer price larger than List.
  - Margin Percent
  - Cost Plus Percent
  - Deselect
5. Type in desired discount, can be a formula based number (e.g. 50/10/5) or a percent (e.g. 50.55352%).
6. Press the "OK" button.
7. Repeat the Specific Discounting function until all of your discounts have been applied.

**Discounts**

**Range Filter**

**Records**

☐ Range

☒ All

☐ Selection

**Record Numbers**

From: 1

To: 35

**Criteria**

Field: -- Select One --

Record That Have: -- Select One --

Matching: Any Part of Text

Logical Operator: -- Select One --

Any Part of Text

**General**

**Dealer Discounts**

☐ Purchase Discount (-) 0.0

☐ Purchase Discount (+) 0.0

☐ Deselect

**Customer Discounts**

☐ Sell Percent (-) 0.0

☐ Sell Percent (+) 0.0

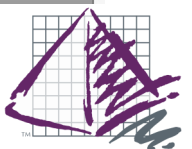
☐ Margin Percent 0.0

☐ Cost Plus Percent 0.0

☐ Deselect

Apply

Cancel



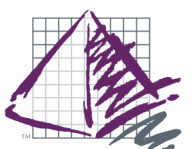


# Discounts “Table”

1. Click the Table icon.
2. Fill in your selection requirements in the top half of the dialog box.
3. Fill in the Discount Table that builds your structure. Discounts can be added by Part Number, Mfg code, Catalog Code or Generic Code. Click the "Display Tag" box to make Tags 1 through 5 available for their own discounts.
4. Information can be entered manually, or the user can use the "Create from fields" button to generate criteria automatically.

The screenshot shows the 'Discounts' dialog box. The 'Range Filter' section at the top has three tabs: 'Records', 'Record Numbers', and 'Criteria'. The 'Record Numbers' tab is selected, showing 'From: 1' and 'To: 35'. The 'Criteria' tab has two rows for defining criteria, each with 'Field', 'Record That Have', and 'Matching' dropdowns. The 'Table' section below contains fields for 'Table Name' (Test), 'Start Date' (8/15/2019), 'End Date' (9/15/2019), and 'Description/Notes' (Pricing locked for 30 days). It also has tabs for 'Generic', 'Tier 1', 'Tier 2', and 'Tier 3'. The 'Tier 1' tab is selected, showing a table with columns: Manufacturer Code, Catalog Code, Part Number, Generic Code, Dealer % Minus, Dealer % Minus F, Dealer Service Fe, Customer % Minus, Customer % Minus, Margin %, and Cost %. The table contains four rows of data for different catalog codes (CHG, IG2, OFE, OST) with varying discount percentages. At the bottom, there are buttons for 'Clear', 'Import DIS', 'Export', 'Create From Fields', and 'Import XML'.

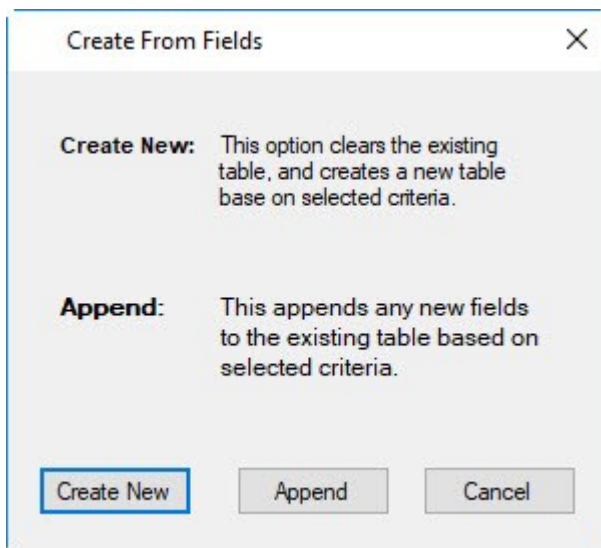
Manufacturer Code	Catalog Code	Part Number	Generic Code	Dealer % Minus	Dealer % Minus F	Dealer Service Fe	Customer % Minus	Customer % Minus	Margin %	Cost %
	CHG			60	50/20				12	
	IG2			58.2	45/20/5				15	
	OFE			62					13	
	OST			58.74					8	





## Discounts “Table”

5. Create New will clear the existing table and create a new table
6. This appends, or edits, the current table
7. The majority of manufacturers assign discounting based on the Catalog Code, some also use the generic code.



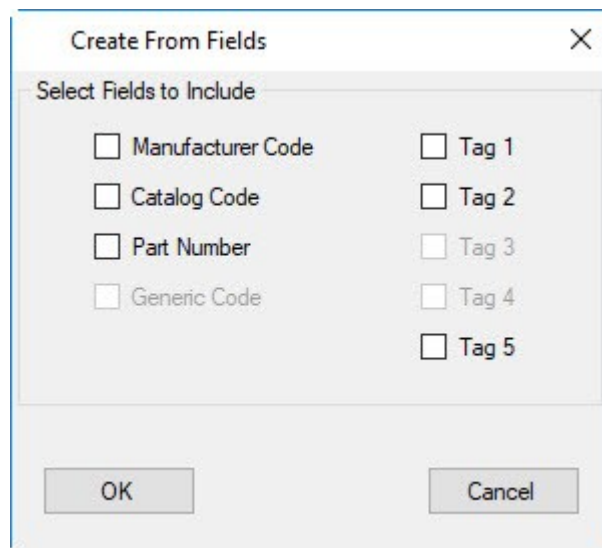
The left pane of the 'Create From Fields' dialog box contains two options: 'Create New' and 'Append'. Each option has a descriptive text block. At the bottom, there are three buttons: 'Create New', 'Append', and 'Cancel'. The 'Create New' button is highlighted with a blue border.

**Create From Fields** [X]

**Create New:** This option clears the existing table, and creates a new table base on selected criteria.

**Append:** This appends any new fields to the existing table based on selected criteria.

[Create New] [Append] [Cancel]



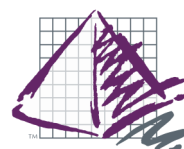
The right pane of the 'Create From Fields' dialog box is titled 'Select Fields to Include'. It contains two columns of checkboxes. The first column lists 'Manufacturer Code', 'Catalog Code', 'Part Number', and 'Generic Code'. The second column lists 'Tag 1', 'Tag 2', 'Tag 3', 'Tag 4', and 'Tag 5'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

**Create From Fields** [X]

Select Fields to Include

<input type="checkbox"/> Manufacturer Code	<input type="checkbox"/> Tag 1
<input type="checkbox"/> Catalog Code	<input type="checkbox"/> Tag 2
<input type="checkbox"/> Part Number	<input type="checkbox"/> Tag 3
<input type="checkbox"/> Generic Code	<input type="checkbox"/> Tag 4
	<input type="checkbox"/> Tag 5

[OK] [Cancel]



# Discounts “Table”

A table can be saved to be used for a later date and/or shared with a co-workers. Enter a name for the table.

Users can now enter a start and end date as well as notes.

Clear will clear all information in the table.

Import DIS will import a saved Discount file from ProjectSpec4.

Export will save the table

Import XML will import a contract for Herman Miller Dealers.

There is the ability to add in Tiered pricing.

- In the Generic Pricing Tab, enter in discounting information and select the "Copy to next tier" box. This will automatically copy the table to make entering in new discounting information easier.
- Select the Tier 1 tab and enter the discounting information. Also the user can enter in the Minimum dollar amount and the maximum dollar amount allowed for that tiered pricing.
- Click the + tab to put information in for another tier.

In tier 2 the user can change the discounting to reflect the discounting.

Then the user can change the Minimum Dollar amount and Maximum dollar amount.

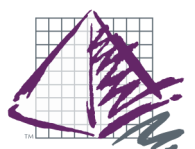
Once Tiered Information has been entered, click Apply.

The screenshot shows the 'Discounts' application window. It features a 'Range Filter' section with 'Records' (All, Selection), 'Record Numbers' (From: 1, To: 35), and 'Criteria' (Field, Record That Have, Matching, Logical Operator). Below this is a 'Table' section with fields for 'Table Name' (Test), 'Start Date' (8/15/2019), 'End Date' (9/15/2019), and 'Description/Notes' (Pricing locked for 30 days). The table has tabs for 'Generic', 'Tier 1', 'Tier 2', and 'Tier 3'. The 'Tier 2' tab is selected, showing a table with columns: Manufacturer Code, Catalog Code, Part Number, Generic Code, Dealer % Minus, Dealer % Minus F, Dealer Service Fe, Customer % Minus, Customer % Minus, Margin %, and Cost %. The table contains data for CHG, IG2, OFE, and OST. The 'OST' row is highlighted. The 'Copy to next tier' checkbox is checked. The 'Show Formula', 'Show Tags', and 'Show Plus % Columns' checkboxes are unchecked. At the bottom, there are buttons for 'Clear', 'Import DIS', 'Export', 'Create From Fields', and 'Import XML'.

Manufacturer Code	Catalog Code	Part Number	Generic Code	Dealer % Minus	Dealer % Minus F	Dealer Service Fe	Customer % Minus	Customer % Minus	Margin %	Cost %
CHG				62					12	
IG2				60					15	
OFE				63					13	
OST				58.74					8	

\*\*\*The user is responsible for selecting the correct tier based on the list price.

List pricing can be seen at a glance in the bottom left corner of the Project window.





# 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.

## PMX (ProjectMatrix File) = .PMX

A .pmx is the new Proprietary file extension that we will be using in ProjectSpec5. It is a file that includes standard .sif, standard option tables, discount tables, projectinfo, images, and swatches. This will also store additional column information not included in a standard .sif.

## Standard Option Table = .sotx

The .sotx is the new Standard Options Table saved format for ProjectSpec5. This will store information for your Standard Options. You have the option to save your .sotx anywhere on your local or network location. This will also import the .sot file extension for Standard Option Table in ProjectSpec4.

## Discount Table = .disx

A .disx file stores the discount information used in the Discount Table. You have the option to save your .disx anywhere on your local or network location. This will also import the .dis file extension for Discount Table in ProjectSpec4.

## Printing

## XML = .xml

All Print Templates will save as a .xml file. You have the option to save your .xml anywhere on your local or network location.

