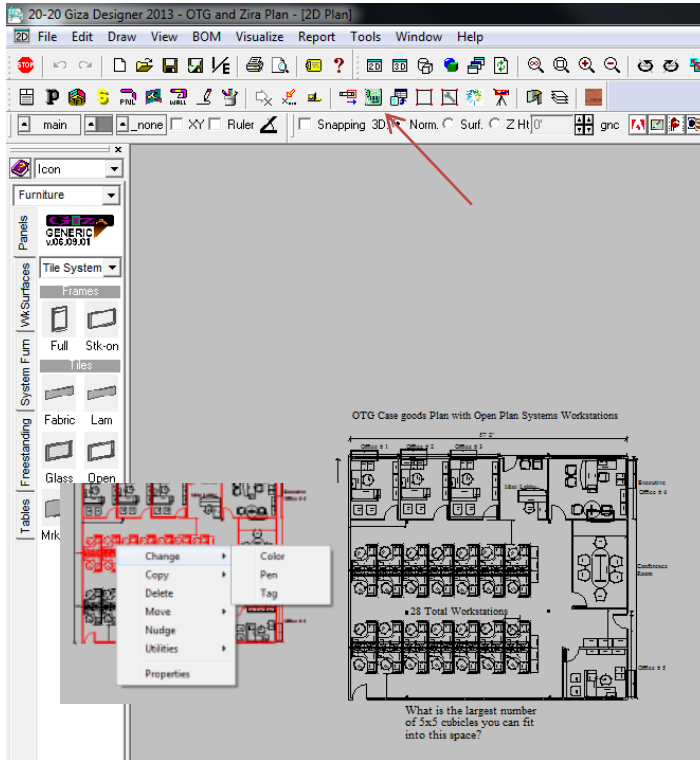


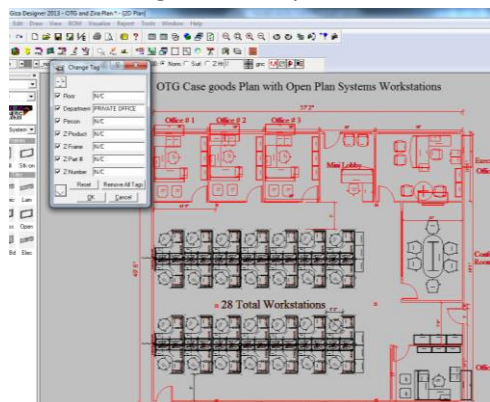
How to create a Worksheet from a cdb file

Step 1. Tag your drawing

- Select the products you want to tag together.
 - *Tags are used to make the quote easy to organize the quote and make easy to read for the client
 - *Groupings may be by area, type of furniture, manufacturer etc. depending on the project
- Right click, select “Change” then “Tag”



- Name the tag in the “Department” section.



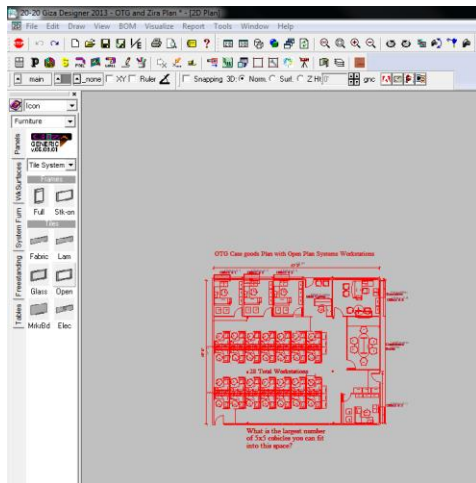
For example;

- Reception / Waiting Area
- Workstations
- Offices by type (Manager’s, Executive, Etc..)
- Conference Room
- Misc. (Files)

Step 2. Creating a worksheet from your drawing

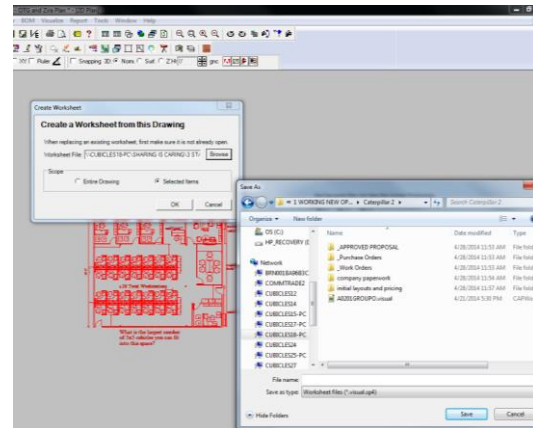
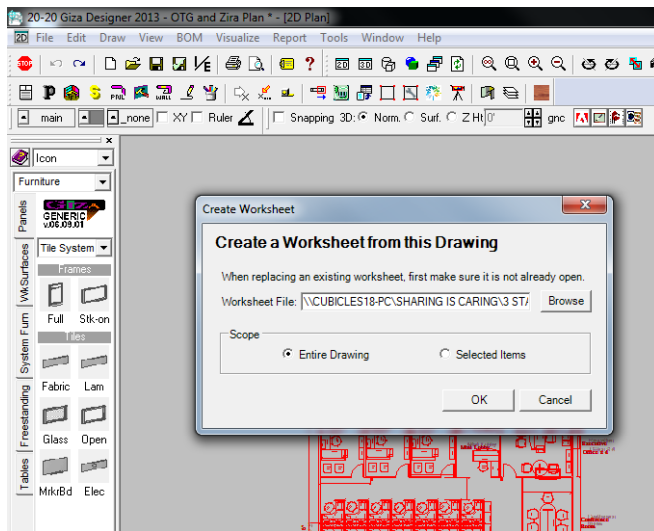
- Select your drawing.

**This can take a few minutes*

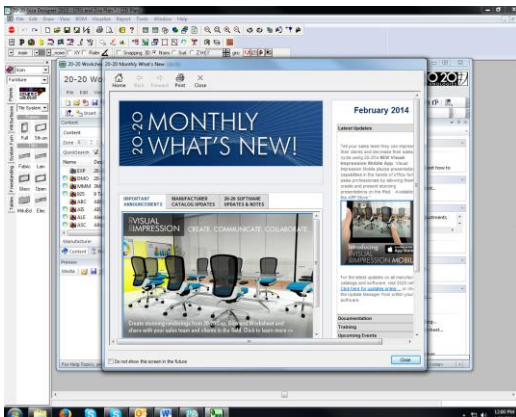


- Click on the worksheet icon, then select the “Selected Items” option.
- Select “Browse” and save the worksheet in the customer folder.

**At this time you can use the customer’s name*



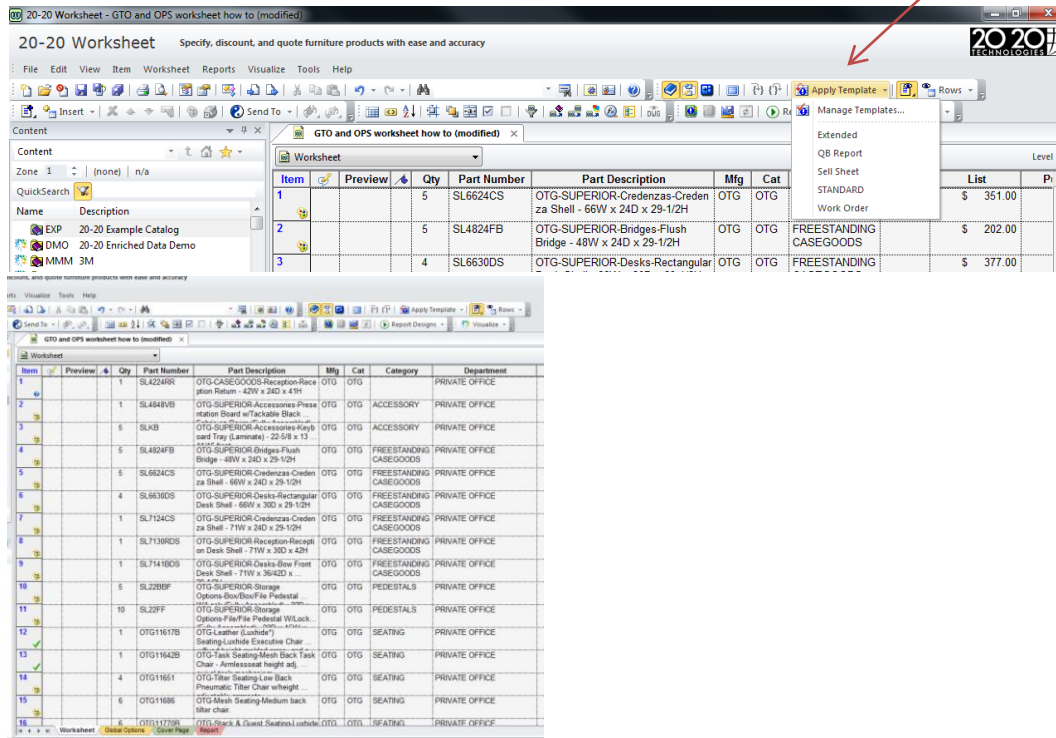
- If you get this pop up, close it...



- Worksheet software will open.

Step 3. Setting up your worksheet.

- In the menu bar select “Apply Template”, then “STANDARD”.

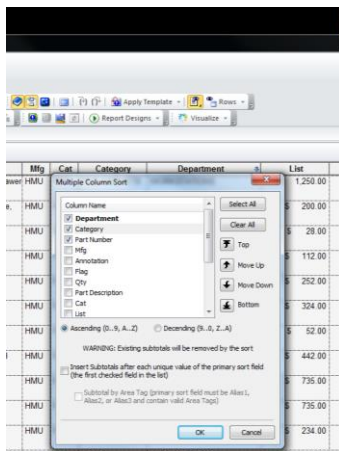


*This will organize the worksheet with all necessary columns for us to make a quote

*By default, the STANDARD template is used

- Now you will sort (3) columns to organize your information.
- Click on the icon with the “AZ” letters.
- Sort the worksheet by the following priorities (check the boxes and move them up to the top of the list)

1. Department
2. Category
3. Part Number



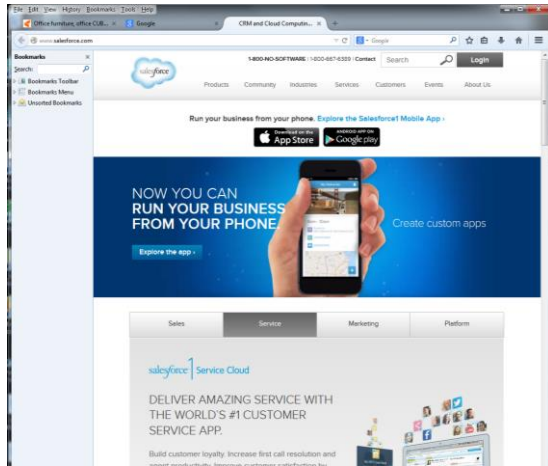
- Click “OK” to take effect.

*You will need to revisit this function each time you edit your worksheet and wish to see it rearranged

Step 4. Look up discounts on Sales Force

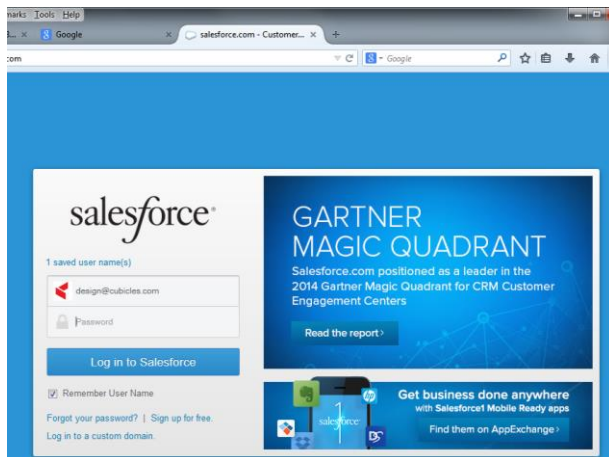
- Go to www.salesforce.com

*Sales Force is a directory of all the manufactures we use



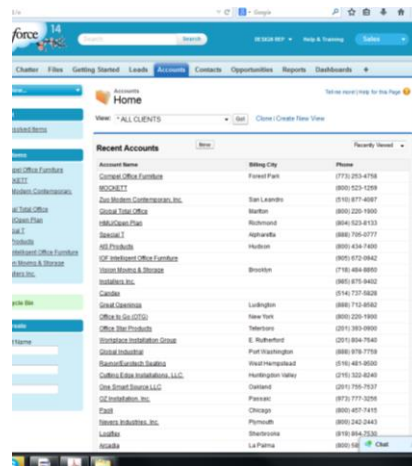
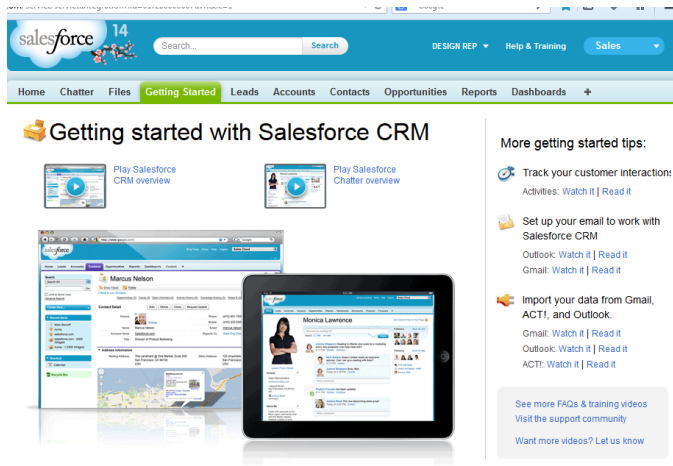
- Log in as username – design@cubicles.com

- Password: cube4orce11

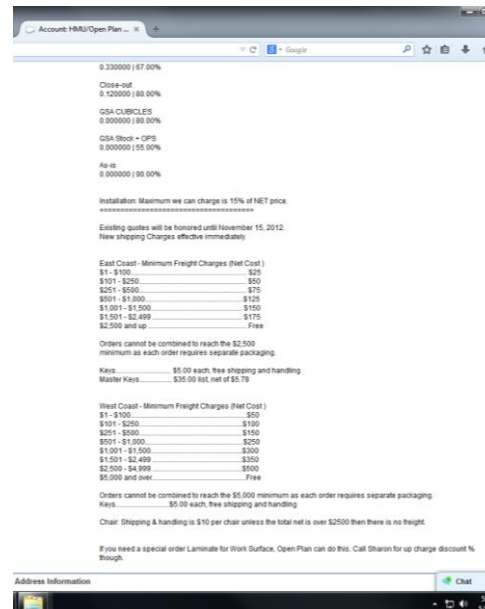
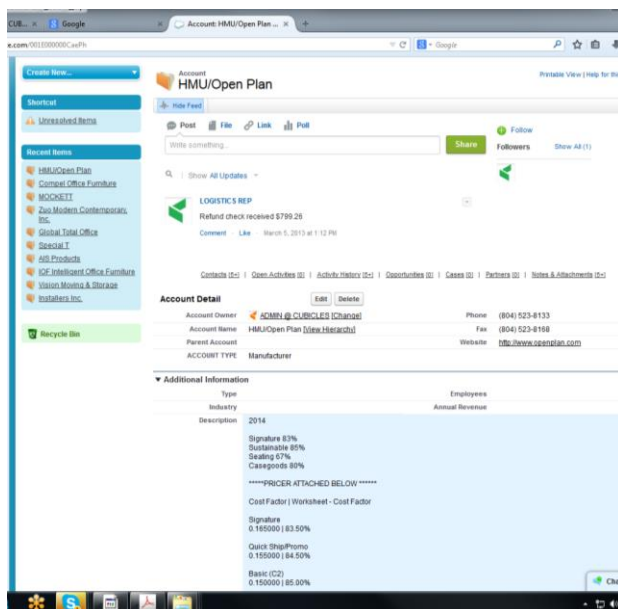


Step 5. Sales Force manufacture search

- Select “Accounts”then select the manufacture.
- *Find the discount information that you will be applying to the worksheet
- *Cubicles.com receives a discount from the manufacturer list price
- *You will search all your manufactures for their discounts



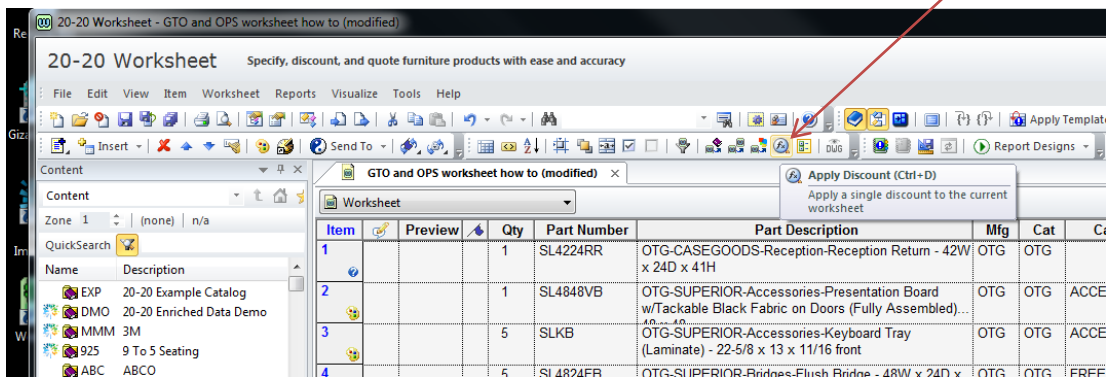
- Manufacturer information page.
 - Based on what you specified you will select the “Discount %” for your worksheet.
- *You’ll have to dig through numbers to find the right one*



- Find information on shipping.
 - *usually found at bottom of the page
- There will usually be a minimum **list** or **net** cost for free shipping.
 - *be sure to check whether the manufacturer requires list or net cost for reduced/free shipping
 - *The shipping will usually be to a warehouse near the project site
 - *There are usually 2 steps to shipping in a project. Manufacturer to Warehouse, and Warehouse to Project Site

Step 6. Apply Discount

- Select “Apply Discount” (the circular icon with the “fx” letters).



- You will insert numbers into the Purchase% and Sell+% columns.

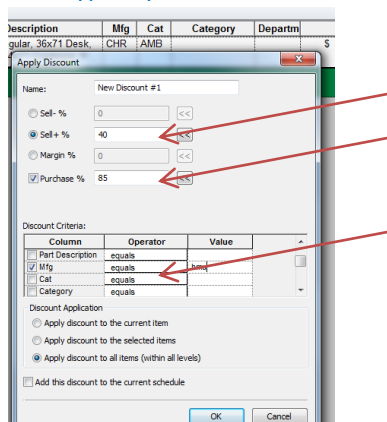
columns.

*The purchase% is the discount percentage you found on salesforce, and the sell+% is the profit for cubicles.com

*The default sell+% is 35%

- To apply discounts to specific manufacturer in one shot, check the “Mfg” column under “Discount Criteria”, and type in the 3 letter manufacturer code into the value column.

*Typically, the same discount is applied to the same manufacturer line



- After discount is applied.

Item	Qty	Part Number	Part Description	Mfg	Cat	Department	Line	Purchase	Sell	Est Purchase	Est Sell	Sell %	Purchase %
1	1	SL4224RR	OTG-CASEGOODS-Reception-Reception Return - 42W x 24D x 41H	OTG	OTG	PRIVATE OFFICE	1	400.00	570.00	400.00	570.00	42.50%	85.00%
2	1	SL4848VB	OTG-SUPERIOR-Accessories-Presentation Board w/Tackable Black Fabric on Doors (Fully Assembled)...	OTG	OTG	PRIVATE OFFICE	2	300.00	420.00	300.00	420.00	40.00%	85.00%
3	5	SLKB	OTG-SUPERIOR-Accessories-KeyBoard Tray (Laminate) - 22-5/8 x 13 x 11/16 front	OTG	OTG	PRIVATE OFFICE	3	100.00	140.00	100.00	140.00	40.00%	85.00%
4	5	SI 4R24FR	OTG-SUPERIOR-Bridges-Flush Bridge - 48W x 24D x 41H	OTG	OTG	PRIVATE OFFICE	4	100.00	140.00	100.00	140.00	40.00%	85.00%

Step 7. Adding “Additional Services & Fees”

- Create 3-4 (or perhaps more) additional rows by right clicking on your mouse -> Insert -> Product

*Or you can press **Ctrl + Shift + P** for shortcut

- Under the Departments column, type in “XXX Additional Services & Fees XXX”.

*Always add “XXX” to insure that this section is always at the bottom of your worksheet

Item	Mfg	Cat	Category	Department	List	Purchase	Sell	Ext Purchase	Ext Sell	Sub
404			X LABOR 1	09 SBT2 - GEORGE (S102K LIST)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0
405			X LABOR 2	09 SBT2 - GEORGE (S102K LIST)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0
406			X LABOR 3	09 SBT2 - GEORGE (S102K LIST)	\$ 0.00	\$ 2,842.00	\$ 3,750.00	\$ 2,842.00	\$ 3,750.00	31
407			SEATING	10 SBT1 - TIM (S0 LIST - SHP ANYTIME)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0
408	OTG	OTG	SEATING	10 SBT1 - TIM (S0 LIST - SHP ANYTIME)	\$ 340.00	\$ 122.40	\$ 159.00	\$ 734.40	\$ 954.00	29
409			TABLE	10 SBT1 - TIM (S0 LIST - SHP ANYTIME)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0
410	OTG	OTG	TABLE	10 SBT1 - TIM (S0 LIST - SHP ANYTIME)	\$ 1,365.00	\$ 383.29	\$ 536.61	\$ 383.29	\$ 536.61	40
411			X LABOR 1	10 SBT1 - TIM (S0 LIST - SHP ANYTIME)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0
412			X LABOR 2	10 SBT1 - TIM (S0 LIST - SHP ANYTIME)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0
413			X LABOR 3	10 SBT1 - TIM (S0 LIST - SHP ANYTIME)	\$ 0.00	\$ 190.00	\$ 250.00	\$ 190.00	\$ 250.00	31
414	OSP	OSP		XXX ADDITIONAL SERVICES & FEES XXX	\$ 0.00	\$ 220.00	\$ 350.00	\$ 220.00	\$ 350.00	29
415	INST	INST		XXX ADDITIONAL SERVICES & FEES XXX	\$ 0.00	\$ 6,510.00	\$ 7,950.00	\$ 6,510.00	\$ 7,950.00	22
416	INST	INST		XXX ADDITIONAL SERVICES & FEES XXX	\$ 0.00	\$ 3,100.00	\$ 2,750.00	\$ 3,100.00	\$ 2,750.00	18
417	INST	INST		XXX ADDITIONAL SERVICES & FEES XXX	\$ 0.00	\$ 2,600.00	\$ 3,150.00	\$ 2,600.00	\$ 3,150.00	21
418	INST	INST		XXX ADDITIONAL SERVICES & FEES XXX	\$ 0.00	\$ 144.00	\$ 250.00	\$ 1,008.00	\$ 1,750.00	73
419	INST	INST		XXX ADDITIONAL SERVICES & FEES XXX	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	0
420								\$ 13,438.00	\$ 16,458.00	27
421								\$ 151,638.92	\$ 191,339.86	28

- Under the Part Description column, type in (or copy) the fees and services for your project. The below examples are for reference.

*Sales tax only applies in NY, with few exceptions

FREE DESIGN SERVICE: Up to 3 revisions of free space planning and design services for furniture products. Design fee may apply for further revisions.

SHIPPING TO WAREHOUSE

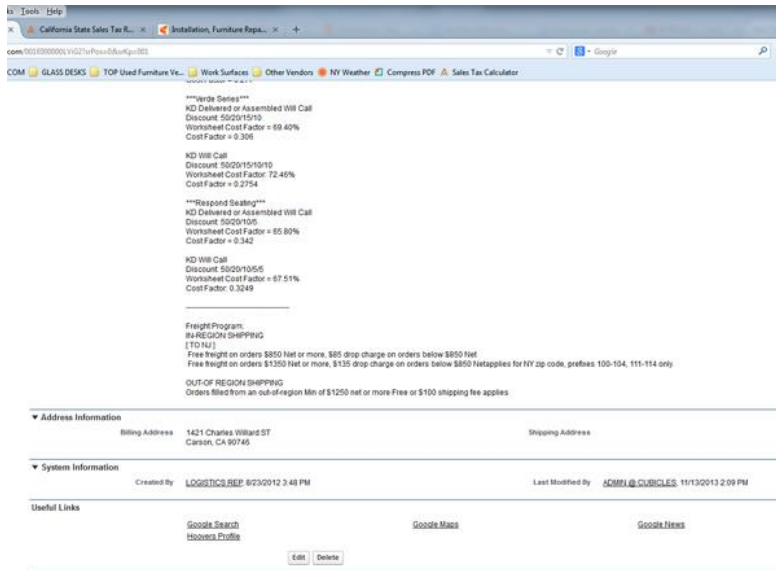
DELIVERY & INSTALLATION: For the above qty. during normal business hours. Includes use of an elevator; stair at extra cost. **NON-UNION RATES**

NY SALES TAX: 8.875%

- Sort in alphabetical order. The “XXX Additional Services & Fees XXX” columns will display at the end of the quote.

Step 8. Figuring Out the Fees

- We provide design services for free, up to 3 revisions in standard cases. This can be quoted initially as \$0.00
- Shipping fee from manufacturer to warehouse is figured out by going to the manufacture pages on Sales Force.
 - * Most manufacturers will provide free shipping if criteria are met



- Delivery & Installation is calculated using this chart on the cubicles.com website.
<http://dev.cubicles.com/office-furniture-services/office-installation/>
 - * You can mark up this number 5~10% to be on the safe side

The screenshot shows the "Installation Rates 2014" chart on the cubicles.com website. The chart lists various furniture items and their installation rates. The rates are categorized by "NON-Union Day", "NON-Union OT", "Union Day", and "Union OT". The chart also includes a "Quick Contact Form" on the right side.

	NON-Union Day	NON-Union OT	Union Day	Union OT
MONOLITHIC CUBICLES				
Call Center 2' x 4'	\$185.00	\$277.50	\$462.50	\$647.50
Typical 6' x 5' - 6' x 6'	\$245.00	\$319.50	\$612.50	\$897.50
Typical 6' x 7' - 6' x 8'	\$285.00	\$427.50	\$712.50	\$997.50
Larger than 6' x 8'	\$375.00	\$562.50	\$937.50	\$1,312.50
FRAME & TILE CUBICLES				
Call Center 2' x 4'	\$215.00	\$322.50	\$537.50	\$752.50
Typical 6' x 5' - 6' x 6'	\$285.00	\$427.50	\$712.50	\$997.50
Typical 6' x 7' - 6' x 8'	\$325.00	\$487.50	\$812.50	\$1,137.50
Larger than 6' x 8'	\$435.00	\$652.50	\$1,087.50	\$1,522.50
CASEGOODS				
Straight Desk	\$100.00	\$150.00	\$250.00	\$350.00
L-Shape Unit	\$150.00	\$225.00	\$375.00	\$525.00
U-Shape Unit	\$225.00	\$337.50	\$562.50	\$787.50
Tabletop Hutch	\$100.00	\$150.00	\$250.00	\$350.00
Freestanding Credenza	100.00	150.00	250.00	350.00
SEATING				
Stackable	\$15.00	\$22.50	\$37.50	\$52.50
Task Seating	\$25.00	\$37.50	\$62.50	\$87.50
Chair/Lounge	\$50.00	\$75.00	\$125.00	\$175.00
Sofas	\$150.00	\$225.00	\$375.00	\$525.00
STORAGE				
2 - 5 Drawer File Cabinet	\$65.00	\$97.50	\$162.50	\$227.50
4 - 5 Drawer File Cabinet	\$85.00	\$127.50	\$212.50	\$297.50
Bookcase	\$85.00	\$127.50	\$212.50	\$297.50
Tall Storage Locker	\$65.00	\$97.50	\$162.50	\$227.50

- Sales tax is calculated last, if applicable.
 - *Sales tax is to be applied against all furniture/fees

Step 9. Add descriptions

count, and quote furniture products with ease and accuracy

2020 TECHNOLOGIES

ts Visualize Tools Help

Send To Visualize Report Designs

A0101SKF (modified) A0201GROUPD x

Item	Qty	Part Number	Part Description
404	0		LABOR FEES
405	1		SHIPS DIRECT TO CLIENT LOADING DOCK - SELF UNLOAD
406	1		INSTALLATION SERVICES - Normal Business Hours, NON Union Rates, Use of Elevator (Stairs Add'l)
sub		09 SBT2 - GEORGE (\$102K LIST)	Subtotal
407	0		SEATING
408	6	OTG11647B	CONFERENCE CHAIR-OTG-Mesh Seating-Tilter Chair with Arms
409	0		VENEER DESKS & TABLES
410	1	VF7236RH	OTG-VENTNOR-Conference Tables-Racetrack Table W/2 1/2 Drum Bases - 72W x 36D x 29H (1-1/2 top)
411	0		LABOR FEES
412	1		SHIPS DIRECT TO CLIENT LOADING DOCK - SELF UNLOAD
413	1		INSTALLATION SERVICES - Normal Business Hours, NON Union Rates, Use of Elevator (Stairs Add'l)
sub		10 SBT1 - TIM (\$0 LIST - SHIP ANYTIME)	Subtotal
414	1		FREIGHT SHIPPING - SPACE 5500 CHAIRS
415	1		DISASSEMBLE / REMOVE / DISPOSE THE EXISTING FURNITURE IN ALL OFFICES (COMBINED)
416	1		BUYBACK CREDIT: OFFERING \$2,750 FOR THE VALUE OF EXISTING ITEMS
417	1		ADDITIONAL ITEMS ON MEZZANINE LEVEL: REMOVE/DISPOSE
418	7		ALL QUOTED LABOR (For New & Existing) is based on one trip. Additional phases add a charge of \$250/Trip. Current Estimate: 8 Trips
419	1		*** This Additional Trip Charge *** may increase or decrease based on actual number of trips.
sub		XXX ADDITIONAL SERVICES & FEES XXX	Subtotal
			Grand Total

Worksheet Global Options Cover Page Report

Visual L: \$729,191.00 P: \$151,658.92 S: \$191,539.66 (none) Item: (none) Row: (none) Col: (none)

- You can put in numbers under the “categories” column to sort the descriptions.

*You can press Ctrl + Shift + P for shortcut

Step 10. Add contacts

- Click the “Worksheet Properties” icon (the one with the yellow hand pointing to a white box), or “Alt + Enter” for shortcut.
- There are 5 tabs on the left hand side, and we will insert information for the “General” and “Order” tabs.

Under the “General” tab, you will fill in contact information.

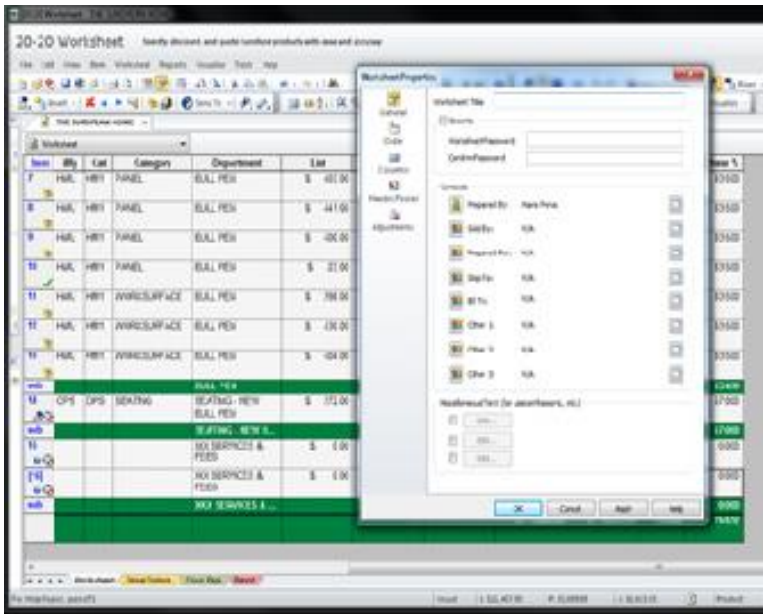
Click on the colorful icon with a person next to the “Prepared By”. Your contact information will go here.

Select your name from the list.

If you have not entered your information yet, click on “Add New”, and enter your name and contact information.

Next, you will enter the client information for “Prepared For”, “Ship To”, and “Bill To”.

Find the client from the list. If this is a new client, enter his/her information.



Sometimes the billing address and shipping address for a client will be different.

Unfortunately, Giza Worksheet can't remember two addresses for one contact name.

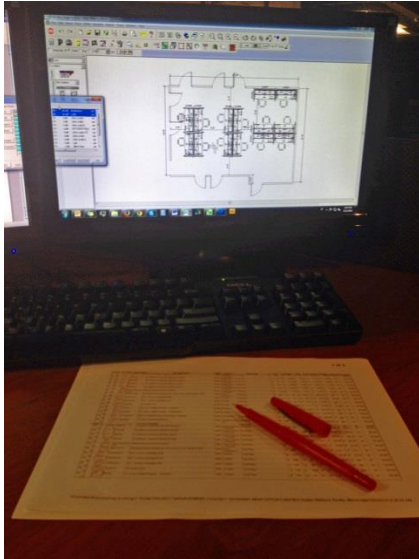
A typical way

Is to add a space in front, or add a period at the end of the client's name when entering the second address.

Not the cleanest solution, but the best we know now.

Step 11. Review your Worksheet

- Print out the worksheet, and use it to check against your Giza drawing.
 - *It is better to print out landscape rather than portrait, otherwise the letters will come out very small.
 - *The numbers can be different, especially when you have to make revisions to your drawing after you created a worksheet.
 - *Make sure to count the numbers of the connectors. Most likely you will use “Auto Hardware” to put in the connectors, and this can cause complications on your drawing/worksheet if the panels of your cubicles aren’t aligned exactly.



- Check if the discounts are applied correctly.
 - *Make sure you applied the correct discounts. The same manufacturer can have different discounts depending on series or furniture type.

Step 12. Generating a Report

You can switch to the Report page from the red tab at the bottom of the screen.
Remember to regenerate the report when you make changes to your worksheet.

- Update the report each time you edit your worksheet.

*The report won't update itself!

Additional tips

*To highlight an entire row, you can click on the numbers on the Item column.

*If you hold down Ctrl while you click the numbers on the Item column, you can select multiple rows at once.

*You can press Ctrl + Shift + Delete to delete rows.