

Calculation View and Budgeting in CET Designer

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Introduction

From your first client meeting to final sign-off, CET helps to clarify and communicate the budget and options for a project. Emily and Lisa will share their processes in using Calculation View and other tools in the program to simplify the project and stick to the budget.



01 WHAT IS A CET BUDGET?

Leveraging CET to your customer's benefit

03 BUDGETING USING CET

In the Calculation View – Internal and External Formats In Excel

05 Questions?

What do you want to know?

02 GETTING "MOSTLY COMPLETE" SPECS QUICKLY

Schemes

Standard Options



PRINTING BUDGETS FROM CET

Logos and Disclaimers Printing and Report Templates

WHAT IS A CET BUDGET?

Client Budget

OFFICESCAPES This pricing is for budgetary purpose pricing will be provided when all pro-

have been finalized. Pricing shown b include Freight, Installation, Design 9

| ä | Qty | Part Number | Description | Sell | Ext. Sell |
|------|-------|--------------|---|--------------------|------------|
| Sea | atina | Area | | | |
| 1 | 2 | TS3BC | Campfire; Seating, Big Lounge | \$2,739.00 | \$5,478.00 |
| 2 | 1 | TS4TBL | Campfire: Big Lamp | \$1,762.00 | \$1,762.00 |
| 3 | 1 | TS4TPT | Campfire; Paper Table | \$1,030.00 | \$1,030.00 |
| 4 | 1 | TS4TWP | Campfire; Table-Personal | \$450.00 | \$450.00 |
| 5 | 1 | TSBUOYWHITE | Buoy; Seat, White, Cap | \$383.00 | \$383.00 |
| | | | | Total Seating Area | \$9,103.00 |
| Wo | rksta | tions | | | |
| 6 | 4 | 442A40 | Gesture; Chair, Wrapped back, Adjustable seat depth | \$1,766.00 | \$7,064.00 |
| 7 | 1 | 891700204MP | Filler-Power Receptacle Opening, Quantity/20 | \$21.02 | \$21.02 |
| 8 | 4 | CQMS177207W | Storage-Mid, Slim, Wall mount application, 17D x 72W x 7 1/2H | \$1,214.00 | \$4,856.00 |
| 9 | 4 | DSLEDF | SOTO; Light-Task, LED, Freestanding | \$321.00 | \$1,284.00 |
| 10 | 4 | FPAC1CC | Eyesite; Monitor arm-Single, Standard crank column, C clamp bracket | \$363.00 | \$1,452.00 |
| 11 | 4 | MIGRELRQ | Migration; Desk-Rectangle, Electric | \$1,443.00 | \$5,772.00 |
| 12 | 4 | RATCL1872P | Top-Common, Square edge profile, Laminate, Proud front, 18 7/8D x 72W | \$178.18 | \$712.73 |
| 13 | 4 | RLF18361AF | Universal; Lateral file, Flush steel front, 1 1/2 high open / open, 18D x 36W | \$382.73 | \$1,530.91 |
| 14 | 7 | RLF18361BP | Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W | \$567.27 | \$3,970.91 |
| 15 | 1 | RLF18361BP | Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W | \$416.59 | \$416.59 |
| 16 | 4 | TS71224LS | Skin, Laminate, 12H x 24W | \$291.00 | \$1,164.00 |
| 17 | 4 | TS71230LS | Skin, Laminate, 12H x 30W | \$302.00 | \$1,208.00 |
| 18 | 4 | TS71230SPW | Window-Single pane, 12H x 30W | \$448.00 | \$1,792.00 |
| 19 | 28 | TS71236LS | Skin, Laminate, 12H x 36W | \$311.00 | \$8,708.00 |
| 20 | 2 | TS71236LTSSW | Skin-Technology, Slatwall, Left hand cut out, 12H x 36W | \$380.00 | \$760.00 |
| 21 | 2 | TS71236RTSSW | Skin-Technology, Slatwall, Right hand cut out, 12H x 36W | \$380.00 | \$760.00 |
| 22 | 8 | TS71236SW | Slatwall, 12H x 36W | \$321.00 | \$2,568.00 |
| 23 | 4 | TS71248LS | Skin, Laminate, 12H x 48W | \$339.00 | \$1,356.00 |
| 24 | 4 | TS71272SPW | Window-Single pane, 12H x 72W | \$701.00 | \$2,804.00 |
| 25 | 8 | TS72424LS | Skin, Laminate, 24H x 24W | \$335.00 | \$2,680.00 |
| 26 | 4 | TS72424LSF | Panel skin, Laminate, Floor, 24H x 24W | \$353.00 | \$1,412.00 |
| 27 | 8 | TS72430LS | Skin, Laminate, 24H x 30W | \$353.00 | \$2,824.00 |
| 28 | 4 | TS72430LSF | Panel skin, Laminate, Floor, 24H x 30W | \$370.00 | \$1,480.00 |
| 29 | 20 | TS72436LS | Skin, Laminate, 24H x 36W | \$369.00 | \$7,380.00 |
| 30 | 6 | TS72442LS | Skin, Laminate, 24H x 42W | \$386.00 | \$2,316.00 |
| 31 | 2 | TS72442LSF | Panel skin, Laminate, Floor, 24H x 42W | \$405.00 | \$810.00 |
| 32 | 8 | TS72448LS | Skin, Laminate, 24H x 48W | \$403.00 | \$3,224.00 |
| 33 | 4 | TS72448LSF | Panel skin, Laminate, Floor, 24H x 48W | \$419.00 | \$1,676.00 |
| 34 | 4 | TS724THF | Frame, Horizontal package, Thin, 24W | \$78.00 | \$312.00 |
| 35 | 4 | TS730THF | Frame-Horizontal package, Thin, 30W | \$84.00 | \$336.00 |
| 36 | 4 | TS73624LS | Skin, Laminate, 36H x 24W | \$376.00 | \$1,504.00 |
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WHAT IS A CET BUDGET?

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A CET Budget is created using the Calculation View in CET

They <u>ARE:</u>

- High and Mid level budgets

- Pulse Points on a project

- A fast way to show cost implications

They <u>ARE NOT:</u>

- Final Specifications

- Final Pricing

- Something the client can take to the bank

WHAT IS A CET BUDGET?

WHEN TO USE A CET BUDGET



the floorplan or furniture designs.

WHAT IS A CET BUDGET?

WHEN TO USE A CET BUDGET



iterations as needed!

GETTING "MOSTLY COMPLETE" SPECS QUICKLY

WHY DO I WANT "MOSTLY COMPLETE" SPECS?

In order to use CET to provide budget pricing on a Project, there needs to be a basic level of detail in the drawings and specifications. The closer to complete the specs are – the more accurate the budget will be. But, as

CET budgets are used at the beginning of the design process, there shouldn't be too much time spent in the details just yet. So, here are some tips to make getting "mostly complete" specs easier and faster.



USE SCHEMES

Many "Smart" objects in CET have Schemes that can be created, saved, and re-used. Schemes allow for inserted drawing objects to be optioned out at first click.



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CREATING AND EXPORTING A NEW SCHEME

CREATING A NEW SCHEME

1) Click on a Scheme box under a "Smart" product tab

2) Click "New"

3) Name your Scheme

4) Choose the product options you want

5) Click "Save"

EXPORTING A SCHEME FOR OTHERS TO USE

1) Click "Export"

2) Choose the Scheme(s) you wish to export

3) Navigate to a project folder or shared drive

4) Name and save your file

IMPORTING A SAVED SCHEME

• • • • • • • • • • • • • • • •

- 1) Click "Import"
- 2) Navigate to the saved Scheme
- 3) Click Open
- 4) Your Scheme will load into CET!

HINT: Create and save basic schemes your company at large can use. For Example:

- Warm Colors
- Cool Colors
- Base Bid Options

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applied!

USE STANDARD OPTIONS

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When creating a floorplan using "related" Project Symbols (aka – more than one part number from a single product type), Standard Options enable applying repeated options with fewer clicks.

CREATING STANDARD OPTIONS

1) Open to Project Symbols

2) Navigate to the part number and apply options.

 Once optioned – right click in the upper box that shows the selected options

 A dialogue box will appear – click "Add all to Standard Options"

The Standard options dialogue box will appear.
 Click on the entry just created to see all the options selected.



APPLYING STANDARD OPTIONS

- Turn ON the "Auto" and "Std" toggles these can be found at bottom center and top left.
- Navigate to a product related to the one created with the Standard Options (Ex: A desk, and a pedestal from the same line.)
- Click on the part number, all shared options should auto populate – leaving only the options unique to that part number.

Emily • 38 Catalog Reader - GCU - DESKING AND TABLES (USA) ProjectSymbols File Edit View Bookmarks Zone Options Help 1 ProjectSymbols Catalog Viewer Desks Islands Part Search Corner Units YO Bridges tex Picklist Returns Credenzas <u>, 12</u> . Freestanding and Connectable Tables Change MFG Storage Hutches + Wall Mounted Overheads + Pigeon Holes + Tackboards Tools Accessories Layers 8 Reception Desks and Accessories Boadroom Tables + Accessories + Table Power ¥ Query Dialog Media Tables + Table Power 1 Collaborative Tables + Table Power Denver Bookcases C - Veneer - Desking E Laminate/Metal - Desking 0 Link Layers to PM Default Categories Benching E Tables 3 Replace All PM Symbol Cache Productivity Solutions and Desk Accessories 倫 Table Power and Technology Solutions Text Settings Education Workstations - eO+ Text Properties Editor 15 Install Text or Part Numb 1 Place Part Search MFG Manager Close Install text C Part Number Text Catalogs 14 Add Options To Symbol Att OFF Std OFF Zone 1 V4 Import/Export là Convert Dwg... 4 Convert Dwg (2D only) ... Modify Converted SF SIF export Import to Drawing. Model quality

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Edit Tools Arrange Views Drawings Help

EXPORTING IMPORTING & CLEARING



1) Navigate to the Standard Options dialogue box by clicking "Edit" – "Standard Options Edit"

2) Click "Save" to save the Standard Options to a project folder or shared drive

IMPORTING STANDARD OPTIONS

1) Click "Open" to load in a previously created Standard Options set

CLEARING STANDARD OPTIONS

1) Click "Clear" to remove the Standard Options

NOTE: The Catalogue Viewer must be closed and re-opened for "Clear" to have applied

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BUDGETING USING CET



BUDGETING IN THE CET CALCULATION TOOL

Use the Article Views in the Calculation tool to apply Discounting and Markup. We will be creating two Views today:

- Internal Pricing
- Client Budget

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PRICING BASICS

List, Buy, Margin, Sell –what does it all mean? Our main focus as designers is NOT pricing, but if we are working with customers early in the sales cycle we need a basic understanding of pricing.

LIST – Manufacturer's published price

BUY – Dealer's cost

SELL – Customer's price

MARGIN –Difference between dealer's cost and customer's price

The manufacturer provides the discounting typically in a percentage off List.

The dealer decides on margin and that percentage is added to the Buy.

| Quantity | - Part Number | - Description - | List - | Ext. List - | Buy % - 💌 | Ext. Buy - | Margin % - | Ext. Sell - |
|----------|---------------|--|------------|-------------|-----------|------------|------------|-------------|
| | | | | | 50 % | | 25 % | |
| 1 | Z204216RL | Space Saver Return (Left) w/no pedestal + 16" Throat - 20D x 42W x 29H, ZIRA | \$381.00 | \$381.00 | 50 % | \$190.50 | 25 % | \$254.00 |
| 1 | Z204216RR | Space Saver Return (Right) w/no pedestal + 16" Throat - 20D x 42W x 29H, ZIRA | \$381.00 | \$381.00 | 50 % | \$190.50 | 25 % | \$254.00 |
| 1 | Z3672E2R | 36"d x 72"w x 29"h, Extended Corner, Single Pedestal, Rectangular Top Desk, File | \$1,928.00 | \$1,928.00 | 50 % | \$964.00 | 25 % | \$1,285.33 |
| 1 | Z3672E3L | 36"d x 72"w x 29"h, Extended Corner, Single Pedestal, Rectangular Top Desk, Box | \$2,324.00 | \$2,324.00 | 50 % | \$1,162.00 | 25 % | \$1,549.33 |
| 2 | Z42S36H | Closed Hutches-W/Doors and One Fixed Shelf - 15D x 42W x 36H, ZIRA | \$1,203.00 | \$2,406.00 | 50 % | \$1,203.00 | 25 % | \$1,604.0 |
| | | | Total GCU | \$7,420.00 | 50 % | \$3,710.00 | 25 % | \$4,946.67 |
| | | | | | 60 % | | 20 % | |
| 8 | RLF18301P | Universal: Lateral file, Proud steel front, 1 high, 18D x 30W | \$955.00 | \$7,640.00 | 60 % | \$3.056.00 | 20 % | \$3,820.00 |
| | | | Total SCF | \$7,640.00 | 60 % | \$3,056.00 | 20 % | \$3,820.00 |
| | | | | | | | | |
| | | | | | 57.5 % | | 20 % | |
| 4 | 442A40 | Gesture; Chair, Wrapped back, Adjustable seat depth | \$1,630.00 | \$6,520.00 | 57.5 % | \$2,771.00 | 20 % | \$3,463.7 |
| | | | Total SCS | \$6,520.00 | 57.5 % | \$2,771.00 | 20 % | \$3,463.75 |
| | | | | | 55 % | | 20 % | |
| 2 | COMT1760155 | Storage-Tall, Mid, Shared application, 17D x 60W x 15H | \$1,013.00 | \$2,026.00 | 55 % | \$911.70 | 20 % | \$1,139.6 |
| | | | Total SCX | \$2,026.00 | 55 % | \$911.70 | 20 % | \$1,139.63 |
| | | | | | 56.5 % | | 20.% | |
| 4 | OLELRO | Ology: Desk-Rectangle, Extended height | \$3,723,00 | \$14,892,00 | 56.5.% | \$6 478 07 | 20 % | \$8.097.5 |
| | outing | ology) book holdingio, extended holgik | Total SHD | \$14,892.00 | 56.5 % | \$6,478.02 | 20 % | \$8,097.53 |
| | | | | | 2 | | | |
| | | | | | 55 % | | 20 % | |
| 4 | DSSA246 | SOTO; Shelf-Standard, 24W x 6D | \$153.00 | \$612.00 | 55 % | \$275.40 | 20 % | \$344.25 |
| 4 | DSTB | SOTO; Tool box | \$34.00 | \$136.00 | 55 % | \$61.20 | 20 % | \$76.5 |
| 4 | DSUB | SOTO; Utility box | \$34.00 | \$136.00 | 55 % | \$61.20 | 20 % | \$76.5 |
| | | | Total SWT | \$884.00 | 55 % | \$397.80 | 20 % | \$497.25 |

INTERNAL BUDGET SETTING UP THE VIEW

• • • • • • • • • • • • • •

1) Create a new Article View

Click on the Setting button (the yellow folder)

3) Name the view "Internal Pricing"

 Under the Columns tab, make sure the following options are selected:

Catalogue | Quantity | Part Number | Description | List | Ext. List | Buy % | Ext. Buy | Margin % | Ext. Sell

5) Under the Grouping tab, select Catalogue. This will group your products by Catalogue – which is often how discounting is applied

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| | | | Compone | ints | | | | | | | | | | | 0.00 | \$102,777. |
| | | | Discount | | | | | | | | | | | | 0 % | \$0. |
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INTERNAL BUDGET APPLYING PRICING

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- Buy % is the Discounting column. Apply discounting by clicking in the column and typing a number. Discounting can be applied to a whole group of product, or to individual lines
- Margin % is the Markup column apply markup in the same way
- Deleting Discounting or Markup. To delete it from a group, double click on the group title line and click the red "X in the dialogue box. To delete it from a line, click on the line – then the red "X"

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| # | + | Catalog - | Quantity | Part Number | Description - | List - | Ext. List - | Buy % - | Ext. Buy - | Margin ⁴ |
| C\$3 | | | | | | | | 100 % | | 100 1 |
| 1 | - (i) | CS3 | 1 | 891700204MP | Filler-Power Receptacle Opening, Quantity/20 | \$37.00 | \$37.00 | 100 % | \$0.00 | 100 |
| | | | | | | Total CS3 | \$37.00 | 100 % | \$0.00 | 0 9 |
| CE | | | | | | | | 0% | | |
| 2 | +1 | SCF | 4 | RATCI 1872P | Ton-Common, Square edge profile, Laminate, Proud front, 18 7/8D x 72W | \$392.00 | \$1,568,00 | 100.55 | \$0.00 | 100 |
| 3 | +1 | SCF | 4 | RLF18351AF | Universal: Lateral file, Flush steel front, 1 1/2 high open / open, 18D x 36W | \$842.00 | \$3,368.00 | 100 % | \$0.00 | 100 |
| 4 | 4I) | SCF | 7 | RLF183618P | Universal: Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W | \$1.248.00 | \$8,736.00 | 100 % | \$0.00 | 100 |
| 5 | 4i) | SCF | 1 | RLF183618P | Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W | \$1,222.00 | \$1,222.00 | 100 % | \$0.00 | 100 |
| 6 | | SCF | 3 | UFSMEDRHANS | Bracket, Medium, Right hand, Storage to panel application, Answer application | \$85.00 | \$258.00 | 100 % | \$0.00 | 100 |
| | | | | | | Total SCF | \$15,152.00 | 100 % | \$0.00 | 0 |
| CE. | | | | | | | | 0.85 | | |
| 7 | +10 | SCS | 3 | 442840 | Gesture: Chair. Wranned back. Adjustable seat denth | \$1,765.00 | \$5,298,00 | 0% | \$5,298,00 | 0 |
| 8 | +1 | SCS | 1 | 442A40 | Gesture: Chair, Wrapped back, Adjustable seat depth | \$1,791.00 | \$1,791.00 | 0 % | \$1,791.00 | 0 |
| | | 1. STR. | | | | Total SCS | \$7,089.00 | 0 % | \$7,089.00 | 0 |
| | | | | | | | | | | |
| LX . | | | | | | | | 100 % | | 100 |
| 9 | • | SCK | 4 | CQMS177207W | Storage-Mid, Siim, Wall mount application, 17D x 72W x 7 1/2H | \$1,214.00 Total SCX | \$4,855.00 | 100 % | \$0.00 | 100 |
| | | | | | | | ., | | | |
| HD | | | | | | | | 0 % | | 0 |
| 10 | • | SHD | 4 | MIGRELRQ | Migration; Desk-Rectangle, Electric | \$1,443.00 | \$5,772.00 | 0 % | \$5,772.00 | 0 |
| | | | | | | Total SHD | \$5,772.00 | 0 % | \$5,772.00 | 0 |
| TW | | | | | | | | 0 % | | 0 |
| 1 | +1) | SWT | 4 | DSLEDF | SOTO; Light-Task, LED, Freestanding | \$321.00 | \$1,284.00 | 0 % | \$1,284.00 | 0 |
| 2 | +1 | SWT | 4 | FPAC1CC | Eyesite; Monitor arm-Single, Standard orank column, C clamp bracket | \$363.00 | \$1,452.00 | 0 % | \$1,452.00 | 0 |
| 3 | (i) | SWT | 4 | WLTS | Letter tray-Portrait, 10W | \$38.00 | \$152.00 | 100 % | \$0.00 | 100 |
| 4 | (i) | SWT | 6 | WPCS | Pen / pencil cup | \$38.00 Total SWT | \$228.00 | 100 % | \$0.00 | 100 |
| | | | | | | Total Sw1 | \$3,110.00 | ~12.2 79 | \$2,730.00 | ~12 |
| RN | | | | | | And the second sec | | 0 % | | 0 |
| 5 | 48 | TRN | 2 | TS3BC | Campfire; Seating, Big Lounge | \$2,739.00 | \$5,478.00 | 100 % | \$0.00 | 100 |
| 6 | • | TRN | 1 | TS4TBL | Campfire; Big Lamp | \$1,762.00 | \$1,762.00 | 100 % | \$0.00 | 100 |
| 7 | • | TRN | 1 | TS4TPT | Campfire; Paper Table | \$1,030.00 | \$1,030.00 | 100 % | \$0.00 | 100 |
| 8 | •1 | TRN | 1 | TS4TWP | Camptire; Table-Personal | \$450.00 | \$450.00 | 100 % | \$0.00 | 100 |
| 9 | 41 | TRN | 1 | TSBUCYWHITE | Budy; Seat, White, Cap | \$383.00 Total TRN | \$383.00 | 100 % | \$0.00 | 100 |
| | | | | | | | | | | |
| SA | | | | | | | | 0 % | | 0 |
| 20 | •8 | TSA | 4 | T571224L5 | Skin, Laminate, 12H x 24W | \$291.00 | \$1,164.00 | 100 % | \$0.00 | 100 |
| 2 | +1 | TSA | 4 | TS71230LS TS71230SPW | Skin, Laminate, 12H x 30W Window-Single name, 12H x 30W | \$302.00 | \$1,208.00 | 100 % | \$0.00 | 100 |
| | | | | | | | | | | - |
| umm | ary | | | | | | | | | |

SAVING & LOADING ARTICLE VIEW

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SAVING AN ARTICLE VIEW TEMPLATE

 Click on the Settings button (the yellow folder). Hit "Save As" and save to a project folder or shared drive

LOADING AN ARTICLE VIEW TEMPLATE

 Create new Article View, then click on the Settings button (the yellow folder). Click "Load" and choose the saved view required.

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| Catalog | - Quantity - | Part Number | | Description | • | List - | Ext. List - | Buy % - | Ext. Buy - | Margin % - | Ext. Sell - |
| | | | | | and the second | | | 50 % | | 12 % | |
| CS3 | 1 | 891700204MP | Filler-Power F | Receptacle Opening, Quantity/20 | | \$37.00 | \$37.00 | 50 % | \$18.50 | 12 % | \$21.0 |
| | | | | | | Total CS3 | \$37.00 | 50 % | \$18.50 | 12 % | \$21.0 |
| | | | | | | | | 60 % | | 12.% | |
| SCF | 4 | RATCL1872P | Top-Common | n, Square edge profile, Laminate, Proud front, 18 7/3 | 8D x 72W | \$392.00 | \$1,568.00 | 60 % | \$627.20 | 12 % | \$712.7 |
| SCF | 4 | RLF18361AF | Universal; La | teral file, Flush steel front, 1 1/2 high open / open, 1 | 18D × 36W | \$842.00 | \$3,368.00 | 60 % | \$1,347.20 | 12 % | \$1,530.9 |
| SCF | 7 | RLF183618P | Universal; La | teral file, Proud steel front, 1 1/2 high drawer / drav | ver, 18D x 36W | \$1,248.00 | \$8,736.00 | 60 % | \$3,494.40 | 12 % | \$3,970.9 |
| SCF | 1 | RLF183618P | Universal; La | teral file, Proud steel front, 1 1/2 high drawer / draw | wer, 18D x 36W | \$1,222.00 | \$1,222.00 | 70 % | \$366.60 | 12 % | \$416.5 |
| SCF | 3 | UFSMEDRHANS | Bracket, Med | lium, Right hand, Storage to panel application, Answ | er application | \$86.00 | \$258.00 | 60 % | \$103.20 | 12 % | \$117.2 |
| | | | | | | Total SCF | \$15,152.00 | ~60.81 % | \$5,938.60 | 12 % | \$6,748.4 |
| | | | | | | | | 55 % | | 0 % | |
| SCS | 3 | 442A40 | Gesture; Cha | air, Wrapped back, Adjustable seat depth | | \$1,766.00 | \$5,298.00 | 55 % | \$2,384.10 | 55 % | \$5,298.0 |
| SCS | 1 | 442A40 | Gesture; Cha | air, Wrapped back, Adjustable seat depth | | \$1,791.00 | \$1,791.00 | 55 % | \$805.95 | 55 % | \$1,791.0 |
| | | | | | | Total SCS | \$7,089.00 | 55 % | \$3,190.05 | 55 % | \$7,089.0 |
| | | | | | And the second second second second | | | 100.% | | 100 % | |
| SCX | 4 | COM5177207W | Storage-Mid | Slim Wall mount application, 17D x 72W x 7 1/2H | | \$1,214,00 | \$4,856,00 | 100 % | \$0.00 | 100 % | \$4.856.0 |
| anen. | | equerree a | starage that | sently their thesis opproximity and a fait of a set | | Total SCX | \$4,856.00 | 100 % | \$0.00 | 0 % | \$4,856.0 |
| | | | | | | | | | | | |
| | | | | | | | | 0% | | 0.% | |
| SHD | 4 | MIGRELRQ | Migration; De | tsk-Rectangle, Electric | | \$1,443.00 | \$5,772.00 | 0 % | \$5,772.00 | 0.% | \$5,772.0 |
| | | | | | | Total SHD | \$5,772.00 | 0 % | \$5,772.00 | 0 % | \$5,772.0 |
| | | | | the second s | | | | 0 % | | 0 % | |
| SWT | 4 | DSLEDF | SOTO; Light- | Task, LED, Freestanding | | \$321.00 | \$1,284.00 | 0 % | \$1,284.00 | 0.% | \$1,284.0 |
| SWT | 4 | FPAC1CC | Eyesite; Moni | itor arm-Single, Standard crank column, C clamp br | acket | \$363.00 | \$1,452.00 | 0 % | \$1,452.00 | 0.% | \$1,452.0 |
| SWT | 4 | WLTS | Letter tray-Po | ortrait, 10W | | \$38.00 | \$152.00 | 100 % | \$0.00 | 100 % | \$152.0 |
| SWT | 6 | WPCS | Pen / pencil o | cup | | \$38.00 | \$228.00 | 100 % | \$0.00 | 100 % | \$228.0 |
| | | | | | | Total SW1 | \$3,116.00 | ~12.2 % | \$2,736.00 | ~12.2 % | \$3,116.0 |
| | | | | | | | | 0 % | | 0 % | |
| TRN | 2 | TS3BC | Campfire; Se | sating, Big Lounge | | \$2,739.00 | \$5,478.00 | 100 % | \$0.00 | 100 % | \$5,478.0 |
| TRN | 1 | TS4TBL | Campfire; Bi | g Lamp | | \$1,762.00 | \$1,762.00 | 100 % | \$0.00 | 100 % | \$1,762.0 |
| TRN | 1 | TS4TPT | Campfire; Pa | aper Table | | \$1,030.00 | \$1,030.00 | 100 % | \$0.00 | 100 % | \$1,030.0 |
| TRN | 1 | TS4TWP | Campfire; Ta | ble-Personal | | \$450.00 | \$450.00 | 100 % | \$0.00 | 100 % | \$450.0 |
| TRN | 1 | TSBUOYWHITE | Buoy; Seat, | White, Cap | | \$383.00 | \$383.00 | 100 % | \$0.00 | 100 % | \$383.0 |
| | | | | | | TOLATTICA | \$9,105.00 | 100 % | \$0.00 | 0.90 | \$9,103.0 |
| | | | | | | | | 0 % | | 0 % | |
| TSA | 4 | TS71224L5 | Skin, Lamina | te, 12H x 24W | | \$291.00 | \$1,164.00 | 100 % | \$0.00 | 100 % | \$1,164.0 |
| TSA | 4 | TS71230LS | Skin, Lamina | te, 12H x 30W | | \$302.00 | \$1,208.00 | 100 % | \$0.00 | 100 % | \$1,208.0 |
| 1.54 | (· | 13/12/30393 | sonoow+Sino | | 1 | 5965.00 | \$1.797.00 | 100.56 | with the | 1110 -5 | 11.792.0 |
| nmary | | | | | | | | | | | Settin |

CLIENT BUDGET SETTING UP THE VIEW

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- 1) Create a new Article View
- Click on the Setting button (the yellow folder)
- 3) Name the view "Client Budget"
- Under the Columns tab, make sure the following options are selected:

Quantity | Part Number | Description | Sell | Ext. Sell

5) There is the option of moving to the Grouping tab to group products by Tag, etc. In our example, we are grouping by Tag 1

| le Edit | Choose manufacturer | | | | Currency: |
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| Quantity - | - Part Number | Description - | Sell - | Ext. Sell - | |
| 3 | 442A40 | Gesture; Chair, Wrapped back, Adjustable seat depth | \$1,766.00 | \$5,298.00 | |
| 1 | 442A40 | Gesture; Chair, Wrapped back, Adjustable seat depth | \$1,791.00 | \$1,791.00 | |
| 1 | 891700204MP | Filler-Power Receptacle Opening, Quantity/20 | \$21.02 | \$21.02 | |
| 4 | CQMS177207W | Storage-Mid, Slim, Wall mount application, 17D x 72W x 7 1/2H | \$1,214.00 | \$4,856.00 | |
| 4 | DSLEDF | SOTO; Light-Task, LED, Freestanding | \$321.00 | \$1,284.00 | |
| 4 | FPAC1CC | Eyesite; Monitor arm-Single, Standard crank column, C damp bracket | \$363.00 | \$1,452.00 | |
| 4 | MIGRELRQ | Migration; Desk-Rectangle, Electric | \$1,443.00 | \$5,772.00 | |
| - 4 | RATCL1872P | Top-Common, Square edge profile, Laminate, Proud front, 18 7/8D x 72W | \$178.18 | \$712.73 | |
| 4 | RLF18361AF | Universal; Lateral file, Flush steel front, 1 1/2 high open / open, 18D x 36W | \$382.73 | \$1,530.91 | |
| 7 | RLF18361BP | Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W | \$567.27 | \$3,970.91 | |
| 1 | RLF18361BP | Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W | \$416.59 | \$416.59 | |
| 4 | TS71224LS | Skin, Laminate, 12H x 24W | \$291.00 | \$1,164.00 | |
| 4 | TS71230LS | Skin, Laminate, 12H x 30W | \$302.00 | \$1,208.00 | |
| 4 | T571230SPW | Window-Single pane, 12H x 30W | \$448.00 | \$1,792.00 | |
| 28 | TS71236LS | Skin, Laminate, 12H x 36W | \$311.00 | \$8,708.00 | |
| 2 | TS71236LTSSW | Skin-Technology, Slatwall, Left hand cut out, 12H x 35W | \$380.00 | \$760.00 | |
| 2 | TS71236RTSSW | Skin-Technology, Slatwall, Right hand cut out, 12H x 36W | \$380.00 | \$760.00 | |
| 8 | TS71236SW | Slatwall, 12H x 36W | \$321.00 | \$2,568.00 | |
| 4 | TS71248LS | Skin, Laminate, 12H x 48W | \$339.00 | \$1,356.00 | |
| 4 | T571272SPW | Window-Single pane, 12H x 72W | \$701.00 | \$2,804.00 | |
| 8 | TS72424LS | Skin, Laminate, 24H x 24W | \$335.00 | \$2,680.00 | |
| 4 | TS72424LSF | Panel skin, Laminate, Floor, 24H x 24W | \$353.00 | \$1,412.00 | |
| 8 | T572430LS | Skin, Laminate, 24H x 30W | \$353.00 | \$2,824.00 | |
| 4 | TS72430LSF | Panel skin, Laminate, Floor, 24H x 30W | \$370.00 | \$1,480.00 | |
| 20 | TS72436LS | Skin, Laminate, 24H x 36W | \$369.00 | \$7,380.00 | |
| 6 | TS72442LS | Skin, Laminate, 24H x 42W | \$386.00 | \$2,316.00 | |
| 2 | TS72442LSF | Panel skin, Laminate, Floor, 24H x 42W | \$405.00 | \$810.00 | |
| 8 | TS72448LS | Skin, Laminate, 24H x 48W | \$403.00 | \$3,224.00 | |
| 4 | TS72448LSF | Panel skin, Laminate, Floor, 24H x 48W | \$419.00 | \$1,676.00 | |
| 4 | TS724THF | Frame, Horizontal package, Thin, 24W | \$78.00 | \$312.00 | |
| 4 | TS730THF | Frame-Horizontal package, Thin, 30W | \$84.00 | \$336.00 | |
| 4 | TS73624LS | Skin, Laminate, 36H x 24W | \$376.00 | \$1,504.00 | |
| 4 | TS73630LS | Skin, Laminate, 36H x 30W | \$417.00 | \$1,668.00 | |
| 4 | TS73648LS | Skin, Laminate, 36H x 48W | \$487.00 | \$1,948.00 | |
| 4 | TS736THF | Frame, Horizontal package, Thin, 36W | \$92.00 | \$368.00 | |
| 6 | TS736THF | Frame, Horizontal package, Thin, 36W | \$92.00 | \$552.00 | |
| 2 | TS742BKT | Bracket-Off module, 42W | \$262.00 | \$524.00 | |
| 2 | TS742THF | Frame, Horizontal package, Thin, 42W | \$101.00 | \$202.00 | |
| 4 | TS748THF | Frame, Horizontal package, Thin, 48W | \$107.00 | \$428.00 | |
| 4 | TS754TEPJ | Junction-End of run, Thin, 54H | \$104.00 | \$416.00 | |
| 6 | TS754TIPJ | Junction-In line, Thin, 54H | \$74.00 | \$444.00 | |
| 1 | TS754TXPJ | Junction-X, Thin, 54H | \$162.00 | \$162.00 | |
| 2 | TS754WPJ | Junction-Wall start, 54H | \$206.00 | \$412.00 | |
| 4 | TS766TIP) | Junction-In line, Thin, 56H | \$74.00 | \$296.00 | |
| 6 | TS772TTC | Top cap, Thin, 72W | \$39.00 | \$234.00 | |
| 2 | TS7757TCTJ | Junction-T, Change of height, Thin, 78 to 54 to 78 | \$383.00 | \$766.00 | |
| | | | | 10 | |
| ummary | | | | | Set |
| | Total | | | | \$94,3 |

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TAKING DATA TO EXCEL

If the BOM/Calculation View from CET is not desirable for a customer facing document we can use Microsoft Excel.

🗟 🔠 Currency: USD File Edit Choose manufacturer INTERNAL PRICING 🧕 🗙 CLIENT BUDGET DB VAD X Enter search here. Search # 🛨 👀 Catalog Quantity -Part Number - + Description List -Ext. List . Buy % Ext. Buy - Margin % -50 % 12 % 50 % 891700204MP Filler-Power Receptacle Opening, Quantity/20 \$37.00 \$37.00 \$18.50 12 % 4i) CS3 Total CS3 \$37.00 50 % \$18.50 12 % 60 % 12.% 41 41 SCF RATCL1872P Top-Common, Square edge profile, Laminate, Proud front, 18 7/8D x 72W \$392.00 \$1,568.00 60 % \$627.20 12 % SCF RLF18361AF Universal; Lateral file, Flush steel front, 1 1/2 high open / open, 18D x 36W \$842.00 \$3.368.00 60 % \$1,347.20 12 % +1 SCF RLF183618P Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W \$1,248.00 \$8,736.00 60 % \$3,494,40 12 % +î) SCF RLF18361BP Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W \$1,222.00 \$1,222.00 70 % \$366.60 12 % SCF UFSMEDRHANS Bracket, Medium, Right hand, Storage to panel application, Answer application \$86.00 \$258.00 60 % \$103.20 12 % \$15,152.00 ~60.81 % \$5,938.60 12 % Total SCF 55 % 0 % **4**3 SCS 3 442A40 Gesture; Chair, Wrapped back, Adjustable seat depth \$1,766.00 \$5,298.00 55 % \$2,384.10 55 % ŧī. SCS 442A40 Gesture; Chair, Wrapped back, Adjustable seat depth \$1,791.00 \$1,791.00 55 % \$805.95 55 % \$3,190.05 55 % Total SCS \$7,089.00 55 % 100 % 100 % +1) SCX COM5177207W Storage-Mid, Slim, Wall mount application, 17D x 72W x 7 1/2H \$1,214.00 \$4.856.00 100 % \$0.00 100 % 4 Total SCX \$4,856.00 100 % \$0.00 0.96 0 % 0.% 4Î) SHD MIGRELRO Migration: Desk-Rectangle, Electric \$1,443.00 \$5,772.00 0 % \$5,772.00 0.% Total SHD \$5,772.00 0 % \$5,772.00 0 % 0 % 0 % **+i**) SWT DSLEDF SOTO; Light-Task, LED, Freestanding \$321.00 \$1.284.00 0 % \$1,284.00 0 % **+i**) SWT FPAC1CC Eyesite; Monitor arm-Single, Standard crank column, C clamp bracket \$363.00 \$1,452.00 0 % \$1,452.00 0.% **+i** SWT WLTS Letter tray-Portrait, 10W \$38.00 \$152.00 100 % \$0.00 100 % 4E) SWT WPCS Pen / pencil cup \$38.00 \$228.00 100 % \$0.00 100 % \$3,116.00 ~12.2 % Total SWT \$2,736.00 ~12.2 % 0 % 0.% 100 % +8) TS3BC Campfire; Seating, Big Lounge \$2,739.00 \$5.478.00 100 % \$0.00 TRN 2 **+**1 TRN TS4TBL Campfire: Big Lamp \$1.762.00 \$1.762.00 100 % \$0.00 100 % **4**Î) TRN TS4TPT Campfire; Paper Table \$1,030.00 \$1,030.00 100 % \$0.00 100 % **+i**) TRN TS4TWP Campfire: Table-Personal 100 % \$0.00 100 % \$450.00 \$450.00 4i) TRN TSBUOYWHITE Buoy; Seat, White, Cap \$383.00 \$383.00 100 % \$0.00 100 % Total TRN \$9,103.00 100 % \$0.00 0% 0 % 0 % ŧŝ TSA TS71224LS Skin, Laminate, 12H x 24W \$291.00 \$1,164.00 100 % \$0.00 100 % ÷i. TSA Skin, Laminate, 12H x 30W \$0.00 100 % TS71230LS \$302.00 \$1,208.00 100 % 100 % +i) TSA TS712305PW Window-Single gane, 12H x 30W \$448.00 \$1.792.00 100 % \$0.00 * Gettings Total \$94,357.43

Calculation

Main

CS3

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Summary

COPY AND PASTE TO EXCEL

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C Refresh X Close

1) Click on "Edit"

2) Click "Select All Cells"

3) Click "Edit" – "Copy All Cells"

4) Open up a blank Excel document

5) Click "Paste"

6) All the raw pricing data from CET will be copied into Excel

NOTE: No formulas are copied over - it is raw data only that the user will need to format as they wish

PRINTING BUDGETS FROM CET

| | CI | lier | nt Budget | The print | DEFFICESCA sprising in for <u>budgetary purpose</u> cing will be provided when all gor benen finalized. Pricing shown in lade Freight, Installation, Design | PES mony, firm opect details below does not Services, or tas |
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| 1 | 1 | Oth | Part Number | Description | Sall | Ext. Sall |
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| | Sea | iting | Area | | | 1 |
| | 1 | 2 | TS3BC | Campfire; Seating, Big Lounge | \$2,739.00 | \$5,478.00 |
| | 2 | 1 | TS4TBL | Campfire; Big Lamp | \$1,762.00 | \$1,762.00 |
| | 3 | 1 | TS41PT | Camptire; Paper Table | \$1,030.00 | \$1,030.00 |
| | 4 | 1 | TS4TWP | Campfire; Table-Personal | \$450.00 | \$450.00 |
| | | | TSBUOYWHITE | Buoy; Seat, White, Cap | \$383.00 | 5383.00 |
| | Wo | rksta | tions | | Total Seating Area | \$9,103.00 |
| | 6 | - 4 | 442A40 | Gesture: Chair, Wrapped back, Adjustable seat depth | \$1,766.00 | \$7,064.00 |
| | 7 | 1 | 891700204MP | Filler-Power Receptacle Opening, Quantity/20 | \$21.02 | \$21.02 |
| | 8 | - 4 | CQMS177207W | Storage-Mid, Slim, Wall mount application, 17D x 72W x 7 1/2H | \$1,214.00 | \$4,856.00 |
| | 9 | - 4 | DSLEDF | SOTO; Light-Task, LED, Freestanding | \$321.00 | \$1,284.00 |
| | | - 4 | FPAC1CC | Eyesite; Monitor arm-Single, Standard crank column, C clamp bracket | \$363.00 | \$1,452.00 |
| | 11 | - 4 | MIGRELRQ | Migration Desk-Rectangle, Electric | \$1,443.00 | \$5,772.00 |
| | 12 | - 4 | RATCL1872P | Top-Common, Square edge profile, Laminate, Proud front, 18 7/8D x 72W | \$178.18 | \$712.73 |
| | 13 | - 4 | RLF18361AF | Universal; Lateral file, Flush steel front, 1 1/2 high open / open, 18D x 36W | \$382.73 | \$1,530.91 |
| | 14 | - 7 | RLF183618P | Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W | \$567.27 | \$3,970.91 |
| | 15 | - 1 | RLF18361BP | Universal; Lateral file, Proud steel front, 1 1/2 high drawer / drawer, 18D x 36W | \$416.59 | \$416.59 |
| | 16 | - 4 | TS71224LS | Skin, Laminate, 12H x 24W | \$291.00 | \$1,164.00 |
| | 17 | - 4 | TS71230LS | Skin, Laminate, 12H x 30W | \$302.00 | \$1,208.00 |
| | 18 | - 4 | TS71230SPW | Window-Single pane, 12H x 30W | \$448.00 | \$1,792.00 |
| | 19 | 28 | TS71236LS | Skin, Laminate, 12H x 36W | \$311.00 | \$8,708.00 |
| | 20 | 2 | TS71236LTSSW | Skin-Technology, Slatwall, Left hand cut out, 12H x 36W | \$380.00 | \$760.00 |
| | 21 | 2 | TS71236RTSSW | Skin-Technology, Slatwall, Right hand cut out, 12H x 36W | \$380.00 | \$760.00 |
| | 22 | 8 | TS71236SW | Slatwall, 12H x 36W | \$321.00 | \$2,568.00 |
| | 23 | - 4 | TS71248LS | Skin, Laminate, 12H x 48W | \$339.00 | \$1,356.00 |
| | 24 | - 4 | TS712725FW | Window-Single pane, 12H x 72W | \$701.00 | \$2,804.00 |
| | 25 | 8 | TS72424LS | Skin, Laminate, 24H x 24W | \$335.00 | \$2,680.00 |
| | 26 | - 4 | TS72424LSF | Panel skin, Laminate, Floor, 24H x 24W | \$353.00 | \$1,412.00 |
| | 27 | 8 | TS72430LS | Skin, Laminate, 24H x 30W | \$353.00 | \$2,824,00 |
| | 28 | 4 | TS72430LSF | Panel skin, Laminate, Floor, 24H x 30W | \$370.00 | \$1,480,00 |
| | 29 | 20 | TS72436LS | Skin, Laminate, 24H x 36W | \$369.00 | \$7,380.00 |
| | | 6 | TS/2442LS | Skin, Laminate, 24H x 42W | \$386.00 | \$2,316.00 |
| | 31 | 2 | 872442LSF | Panel skin, Laminate, Floor, 24H x 42W | \$405.00 | \$810.00 |
| | 32 | 8 | S72448LS | Skin, Laminate, 24H x 48W | \$403.00 | \$3,224.00 |
| | 33 | 4 | TS72448LSF | Panel skin, Laminate, Floor, 24H x 48W | \$419.00 | \$1,676.00 |
| | 34 | -4/ | TS724THF | Frame, Horizontal package, Thin, 24W | \$78.00 | \$312.00 |
| | | 1 | TS730THF | Frame-Horizontal package, Thin, 30W | \$84.00 | \$336.00 |
| | | 4 | TS73624LS | Skin, Laminate, 36H x 24W | \$376.00 | \$1,504,00 |
| | 37 | 4 | T\$73630LS | Skin, Laminate, 36H x 30W | \$417.00 | \$1,668.00 |
| | 34 | 4 | TS73648LS | Skin, Laminate, 36H x 48W | \$487.00 | \$1,948.00 |
| | 2 | 4 | 15736THF | Frame, Horizontal package, Thin, 36W | 592.00 | 5368.00 |
| / | 40 | 6 | TS736THF | Frame, Horizontal package, Thin, 36W | \$92.00 | \$552.00 |
| 1 | 41 | 2 | TS742BKT | Bracket-Off module, 42W | \$262.00 | \$524.00 |
| | 42 | 2 | 1S742THF | Frame, Horizontal package, Thin, 42W | \$101.00 | \$202.00 |
| 1 | 43 | 4 | TS748THF | Frame, Honzontal package, Thin, 48W | \$107.00 | 5428.00 |
| | 44 | 4 | TS754TEPJ | Junction-End of run, Thin, 54H | \$104.00 | \$416.00 |
| | 45 | 6 | TS754TIPJ | Junction-In line, Thin, 54H | \$74.00 | \$444.00 |
| 3 | 46 | 1 | TS754TXPJ | Junction-X, Thin, 54H | \$162.00 | \$162.00 |
| | 47 | 2 | TS754WPJ | Junction-Wall start, 54H | \$206.00 | \$412.00 |
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INSERTING A DISCLAIMER OR LOGO

The disclaimer or logo needs to be a JPEG file or similar to insert into CET.

HINT: If you are writing a disclaimer – type it up in Word, and take a screenshot of the writing.

1) Go to the Print Reports dialogue box

2) Make sure you are on the "Report Settings" Tab

3) Click on "Document Contents"

4) Click on the "..." next to Logotype, and choose your JPEG

PRINT REPORTS INTERNAL BUDGET

Print the Internal Budget article view and save it for your records.

1) Click on Article Views

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- Choose "Use the columns chosen in each view
- 3) Turn <u>off</u> Show Product in Header | Show "Sold To" in header | Show "Distributor" in header | Show file Location in Footer
- Make sure the Internal Pricing article view selected, and hit print



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PRINT REPORTS CLIENT BUDGET

- Navigate back to the Report Settings tab
- 2) Click on Article Views

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- Choose "Use the columns chosen in each view
- 4) Turn off Show Product in Header | Show "Sold To" in header | Show "Distributor" in header | Show file Location in Footer | Expand List | Show Detailed Information
- Make sure you have the Client
 Budget article view selected, and hit print

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QUESTIONS?

THANK YOU