

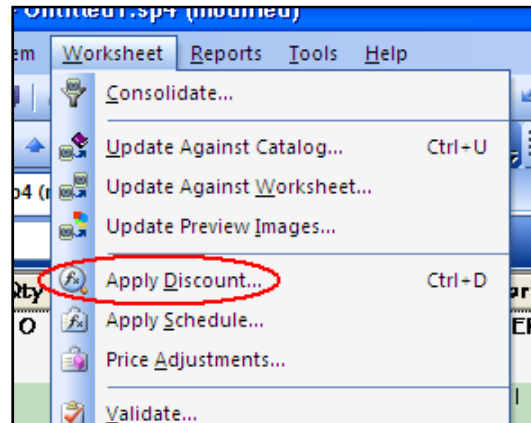
Applying a discount in Worksheet

Kimball®Office

This document covers the necessary steps required to add a discount to your specification file within 20-20 Worksheet. Please be sure to review the Worksheet User Guide for additional information on this feature. It can be accessed from the Help pull-down menu.

Getting started

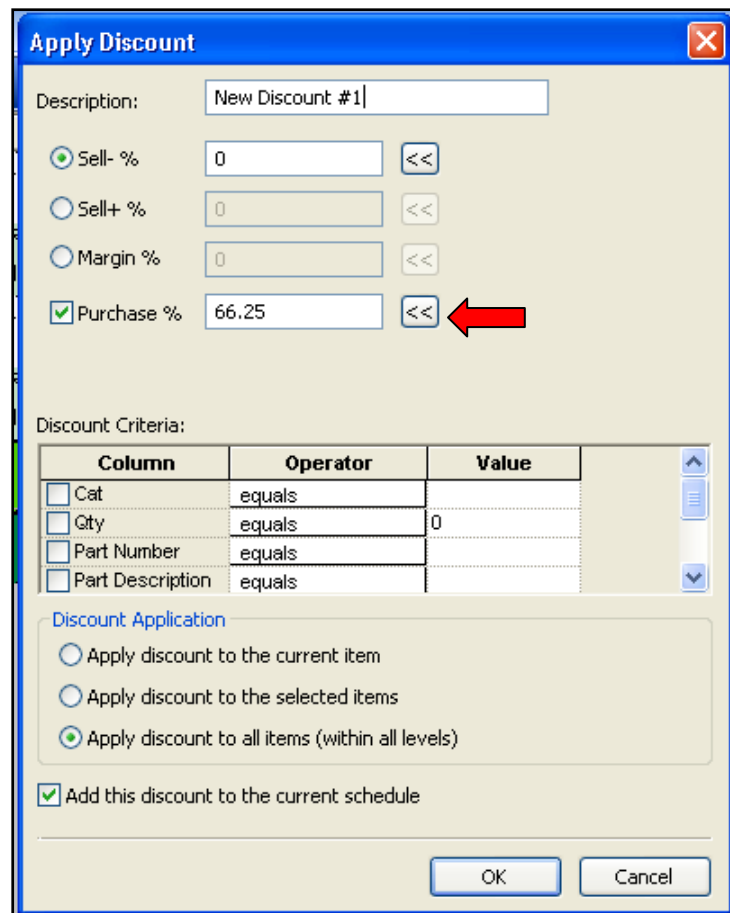
With a worksheet file open, all you need to do is simply select **Apply Discount...** from the **Worksheet** pull-down menu.



After the window opens you may select and enter a value for either **Sell- %**, **Sell+ %** or **Margin %**. Simply click once to change from one to another.

You may also include a **Purchase %**. For this example that is what I will use. A discount can be entered by either typing in a single value or selecting the icon to the right of the value window. This will allow you to include a tiered (50/10/25) discount.

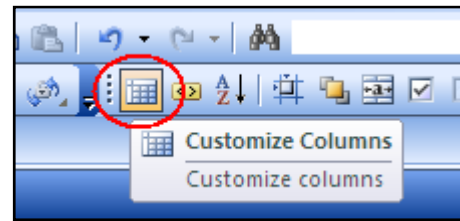
Once you have entered in the appropriate information select **OK**.

A screenshot of the 'Apply Discount' dialog box. The 'Description' field contains 'New Discount #1'. There are four radio button options: 'Sell- %' (selected), 'Sell+ %', 'Margin %', and 'Purchase %'. The 'Purchase %' value is '66.25' and has a red arrow pointing to its right-side navigation buttons. Below is a 'Discount Criteria' table with columns 'Column', 'Operator', and 'Value'. The table has four rows: 'Cat' (equals), 'Qty' (equals, 0), 'Part Number' (equals), and 'Part Description' (equals). Below the table is a 'Discount Application' section with three radio button options: 'Apply discount to the current item', 'Apply discount to the selected items', and 'Apply discount to all items (within all levels)' (selected). At the bottom, there is a checked checkbox 'Add this discount to the current schedule' and 'OK' and 'Cancel' buttons.

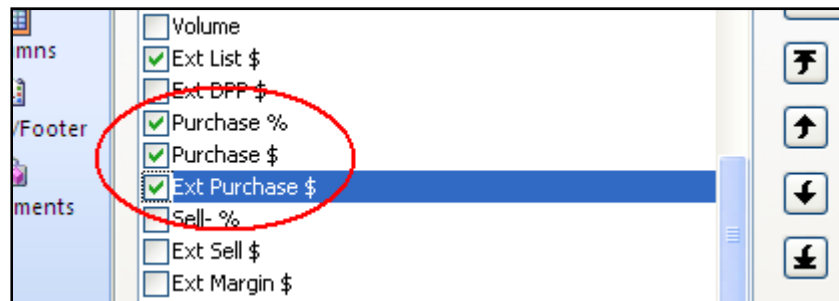
Column	Operator	Value
<input type="checkbox"/> Cat	equals	
<input type="checkbox"/> Qty	equals	0
<input type="checkbox"/> Part Number	equals	
<input type="checkbox"/> Part Description	equals	

Applying a discount in Worksheet

In order to see the discounted information we just entered we will need to access our **Customize Columns** window by selecting its icon...



...and then turning on the appropriate columns. In my example I will turn on the **Purchase %**, **Purchase \$** and **Ext Purchase \$** by placing a check in each box.



*Tip: In this window you can rearrange the order of the columns with the use of the black arrows along the right hand side. You can also resize the columns in this window by adjusting the number in the **Width** box found at the bottom of this window.*

After selecting **OK** these columns are now visible in my worksheet.

Cat	Qty	Part Number	Part Description	List \$	Ext List \$	Purchase %	Purchase \$	Ext Purchase \$
KLH	250	21H24LTAD	HUM,24W,LOW TERRACE ASSEMBLY,DUAL	\$ 350.00	\$ 87,500.00	66.250	\$ 118.13	\$ 29,532.50
		STD 1 4 405	STANDARD GROUP I DESIGNER WHITE					
KLH	250	21H30LTAD	HUM,30W,LOW TERRACE ASSEMBLY,DUAL	\$ 400.00	\$ 100,000.00	66.250	\$ 135.00	\$ 33,750.00
		STD 1 4 405	STANDARD GROUP I DESIGNER WHITE					

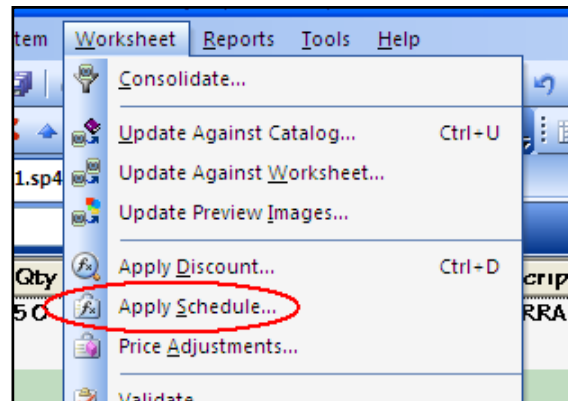
At this time I would like to go over how the discount is calculated. It is applied to the list price of a single item. It is then multiplied by its quantity to get the extended discounted price. I mention this because often we apply the discount to the extended list price and these calculations do not always match.

The examples above show this. The first line item calculates this way: $\$350 - 66.25\% = \118.125 or $\$118.13$. Multiple this by the quantity to get the extended purchase price: $\$118.13 \times 250 = \$29,532.50$. If you take the extended list price and applied the discount you get a different extended purchase price: $\$87,500 - 66.25\% = \$29,531.25$ a difference of $\$1.25$.

Now, working with the second line item and applying both calculations they come out equal. This can be confusing therefore I thought it was important to go over how the calculation is done in the program.

Applying a discount in Worksheet

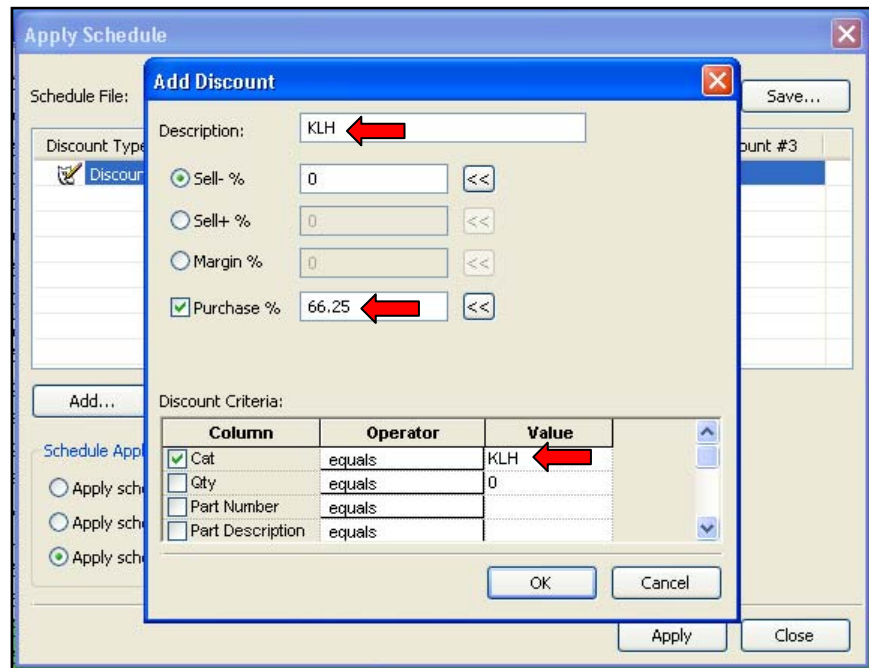
These steps so far have taken you through the process of applying one discount to your worksheet file. If you need to apply more than one discount you should try the **Apply Schedule** feature. It allows you to incorporate multiple discounts at one time.



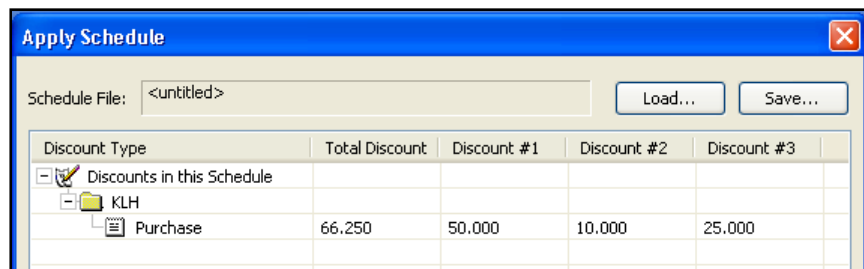
After the Apply Schedule window opens, select the **Add...** button.

A second window opens. Add a description, discount & criteria. In my example the first discount will be applied to the Hum product therefore I will use its catalog code **KLH** as my description. I will also use it as the value in the **Discount Criteria** area.

Once everything is entered, select **OK**.



The KLH discount information now appears in the schedule.

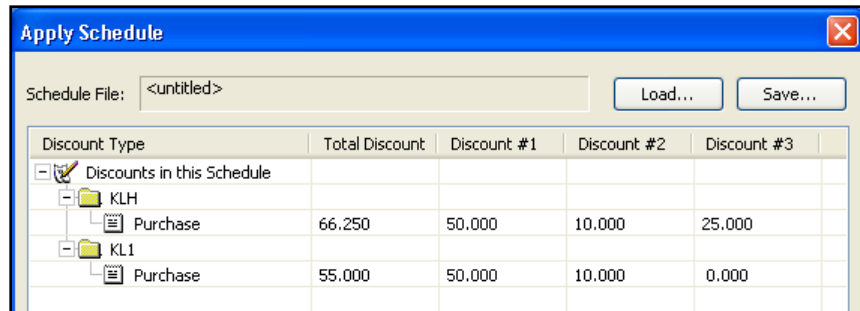


Select the **Add...** button to continue to add any additional discounts that are required. I will do one more and use KL1 code for Seating in my example. The purchase discount will be 55%.

Applying a discount in Worksheet

My schedule now includes two discounts; one for KLH & one for KL1.

I now need to save this schedule. This is done by selecting the **Save...** button in the upper right corner.



*Tip: With this schedule saved, I can reuse it in other worksheet files. Use the **Load...** button to incorporate existing schedules into a worksheet file. Be sure to keep track of the file placement!*

Once the file is saved you can now add it to your worksheet by selecting **Apply**. My worksheet file now includes both discounts and they were applied based on the catalog code.

Cat	Qty	Part Number	Part Description	List \$	Ext List \$	Purchase %	Purchase \$	Ext Purchase \$
KLH	250	21H24LTAD	HUM,24W,LOW TERRACE ASSEMBLY,DUAL	\$ 350.00	\$ 87,500.00	66.250	\$ 118.13	\$ 29,532.50
		STD 1.4 405	STANDARD GROUP 1 DESIGNER WHITE					
KLH	250	21H30LTAD	HUM,30W,LOW TERRACE ASSEMBLY,DUAL	\$ 400.00	\$ 100,000.00	66.250	\$ 135.00	\$ 33,750.00
		STD 1.4 405	STANDARD GROUP 1 DESIGNER WHITE					
KL1	250	K24DD	APPROACH,SYNCHRO-TILT,UPHD SEAT,UPHD BACK,HGT ADJ ARMS	\$ 755.00	\$ 188,750.00	55.000	\$ 339.75	\$ 84,937.50
		GRADE 1						

You now have applied a single discount to a worksheet and created a schedule that includes multiple discounts. Remember there are additional functions and benefits to both of these features. I would again encourage you to review the Worksheet User Guide for more details.

I hope that you have found this information helpful.