

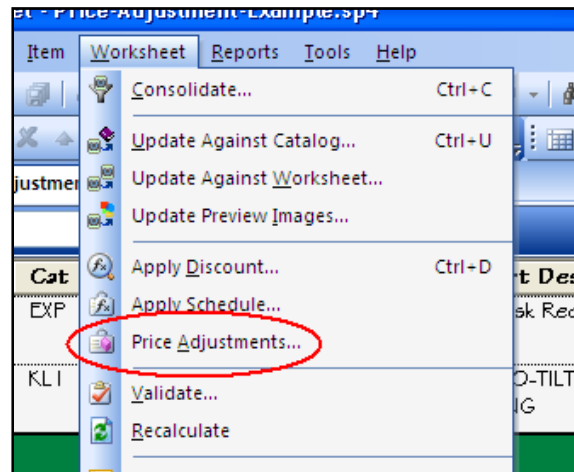
Applying a surcharge in Worksheet

Kimball®Office

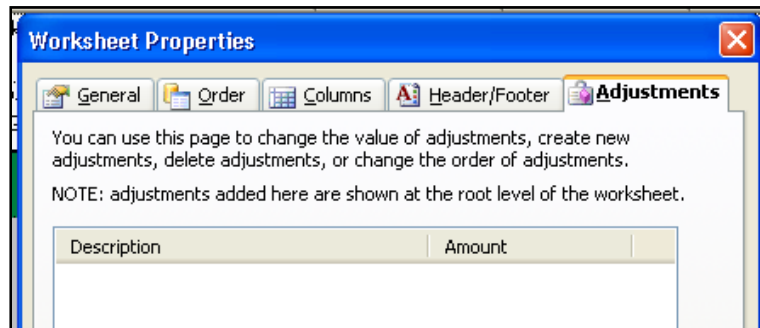
This document covers the necessary steps required to add a surcharge to your worksheet file using the Price Adjustment feature within 20-20 Worksheet. Please be sure to review the Worksheet User Guide for additional information on this feature. It can be accessed from the Help pull-down menu within Worksheet.

Getting started

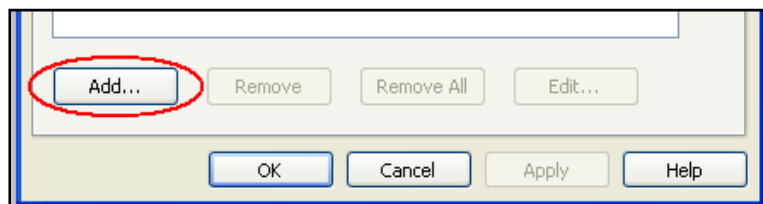
With the Worksheet program open, all you need to do is simply select **Price Adjustments...** from the **Worksheet** pull-down menu.



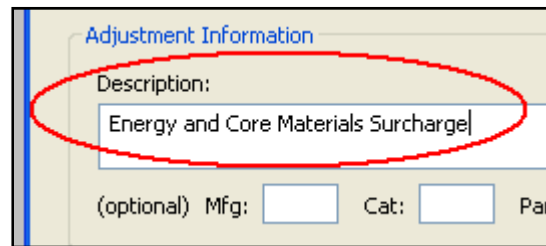
When the Worksheet Properties window opens make sure you are on the **Adjustments** tab...



...and then select the **Add** button along the bottom.



Enter in an appropriate description for this adjustment.



Applying a surcharge in Worksheet

Select **Percent** for the Adjustment Type.

Please reference the User Guide for information regarding the additional selections at the bottom of this window.

Now, select the **Next** button.

Adjustment Type

Fixed-Amount

Percent

Advanced

Percent
Example: This adjustment type might be used to apply a percent amount as a tax.

Include preceding adjustments in this adjustment's calculation

Allow succeeding adjustments to use this adjustment in their calculations

Include in SIF output as a line item

< Back **Next >** Finish Close Help

In the next window we want to set this up as a **Charge**, set the percentage to **1.00** and have it calculated off the **Ext Purchase \$** (Extended Purchase dollar value).

With the settings that we just went over this surcharge will be calculated off the extended purchase price. I can now select where I want this value to be added. I am going to add it to the List, Purchase and Sell values.

Select **Next**.

Insert Adjustment

Percent Adjustment Details

Please enter the details of the percent adjustment.

Percent adjustments are calculated values based on items included by the criterion set on the next page.

Charge Credit

Adjustment Percentage: 1.00

Calculate off of Column: Ext Purchase \$

Add or Subtract Adjustment's Value to these Columns

List

Purchase

Sell

Under the Price Adjustment Criteria I would suggest placing a check mark in the **Mfg** box and set the value equal to **KIM**. This will only apply the adjustment to Kimball Office product. **KIM** is the catalog code for Kimball Office.

Now select **Finish**. When the Worksheet Properties window reappears, select **OK**.

Price Adjustment Criteria

Which items will be used to determine this adjustment?

Adjustment Criteria:

| Column | Operator | Value |
|--|----------|--------|
| <input type="checkbox"/> Lock | equals | Locked |
| <input type="checkbox"/> Flag | equals | on |
| <input checked="" type="checkbox"/> Mfg | equals | KIM |
| <input type="checkbox"/> Cat | equals | |
| <input type="checkbox"/> City | equals | 0 |
| <input type="checkbox"/> Part Number | equals | |

Applying a surcharge in Worksheet

| Mfg | Cat | Qty | Part Number | Part Description | List \$ | Ext List \$ | Ext Purchase \$ | Ext Sell \$ |
|--------------------|-----|-----|----------------------|---|-------------|-------------|-----------------|-------------|
| EXP | EXP | 1 | DPDRBBFLFFRF 3072 | Double Pedestal Desk Rectangular Front E/B/F-F/F 72L x 30W | \$ 1,083.00 | \$ 1,083.00 | \$ 433.20 | \$ 541.50 |
| KIM | KL1 | 1 | K2OBT | WISH_TASK,SYNCRO-TILT,LUMBAR,HGT ADJBL ARMS,CONTRASTING | \$ 792.00 | \$ 792.00 | \$ 316.80 | \$ 396.00 |
| | | 1 | | Energy and Core Materials Surcharge | \$ 3.17 | \$ 3.17 | \$ 3.17 | \$ 3.17 |
| Grand Total | | | | | | \$ 1,878.17 | \$ 753.17 | \$ 940.67 |

Once you are back in your worksheet you should notice the bright green line added to the bottom of your worksheet. In my example above it includes all of the information that I have entered during this exercise.

Other things to notice:

- The surcharge was calculated off the Kimball Office product only (1% of \$316.80 = \$3.17). I have included one line item that is not our product (EXP manufacturer code) and it was not part of the calculation.
- The surcharge was added to the extended list and sell, as well as the purchase price.
- If no discounts had been applied the extended list, extended purchase and extended sell dollar values would all be the same.
- If you need to edit the price adjustment, just left click on it. If you need to delete it, just right click on it.
- When you are working with a worksheet file that includes multiple line items, sub totals (shown below) can be useful to help verify calculations.

| Item | Mfg | Cat | Qty | Part Number | Part Description | List \$ | Ext List \$ | Ext Purchase \$ | Ext Sell \$ |
|--------------------|-----|-----|-----|----------------------|---|-------------|-------------|-----------------|-------------|
| 1* | EXP | EXP | 1 | DPDRBBFLFFRF 3072 | Double Pedestal Desk Rectangular Front E/B/F-F/F 72L x 30W | \$ 1,083.00 | \$ 1,083.00 | \$ 433.20 | \$ 541.50 |
| 2* | EXP | EXP | 1 | EXHB | Executive High-Back Chair | \$ 760.00 | \$ 760.00 | \$ 760.00 | \$ 760.00 |
| sub | EXP | | | | EXP Subtotal | | \$ 1,843.00 | \$ 1,193.20 | \$ 1,301.50 |
| 3* | KIM | KL2 | 1 | 22K3072DDFL W8 | PREVAIL,30DX72W,DESK,DBL PED,RECTANGULAR,LAMWOOD,BB/FF | \$ 2,270.00 | \$ 2,270.00 | \$ 2,270.00 | \$ 2,270.00 |
| 4* | KIM | KL1 | 1 | K2OBT | WISH_TASK,SYNCRO-TILT,LUMBAR,HGT ADJBL ARMS,CONTRASTING | \$ 792.00 | \$ 792.00 | \$ 316.80 | \$ 396.00 |
| sub | KIM | | | | KIM Subtotal | | \$ 3,062.00 | \$ 2,586.80 | \$ 2,666.00 |
| | | | 1 | | Energy and Core Materials Surcharge | \$ 25.87 | \$ 25.87 | \$ 25.87 | \$ 25.87 |
| Grand Total | | | | | | \$ 4,930.87 | \$ 3,805.87 | \$ 3,993.37 | |

These steps take you through the process of adding a price adjustment to one worksheet file. If you would like to have an adjustment included with each and every new file that you create or generate you need to set it up in your project properties. Go to the **File** pull-down menu, select **Project Properties...** and then select **Edit**. Move to the **Adjustments** tab and follow the same steps outlined in this document. When you are done and back in the **Project Properties** window select **Finish**. Now, when you open Worksheet or generated a bill of materials from your drawing file the surcharge will be there.

If you have set up a template and use it to get your files formatted to a standard layout, you can edit that template and add a price adjustment. Just select **Manage Templates...** from the **Apply Template** drop down and then select your template name and then **Edit**.

This price adjustment feature can be useful for other charges or credits as well; i.e. sales tax, design or installation fees just to name a few. I hope that you have found this information helpful.