

Consolidating in Worksheet

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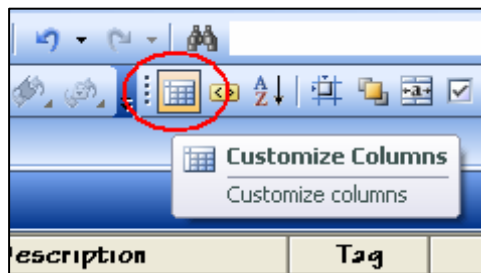
Removing unnecessary tags and consolidating your file will benefit everyone. Here is one way to think if it; if each line item in your specification represents a box of product, it would mean fewer boxes for us to ship and fewer boxes for you to handle on the job site. It would also reduce the amount of packaging required which would benefit the environment as well.

Remember the 3 R's: Reduce, Reuse & Recycle.

Have you ever been working on a specification and the same item is listed several times in your worksheet file?

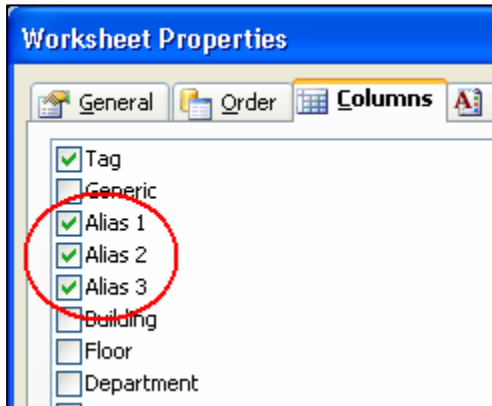
In my example below; line items 7 thru 9 are the same item, 10 thru 12 show another item and 13 thru 15 are yet another item. The most likely culprit in causing this is a tag. Not the tag that appears in the **Tag** column but one that exists in another column such as the **Alias 1**, **Alias 2** or **Alias 3**.

Item	Cat	Qty	Part Number	Part Description	Tag	List
7 ✓	KL8	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,LEFT HAND	L	\$ 19.00
8 ✓	KL8	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,LEFT HAND	L	\$ 19.00
9 ✓	KL8	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,LEFT HAND	L	\$ 19.00
10 ✓	KL8	15	IBRWSER	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,RIGHT HAND	R	\$ 19.00
11 ✓	KL8	15	IBRWSER	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,RIGHT HAND	R	\$ 19.00
12 ✓	KL8	15	IBRWSER	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,RIGHT HAND	R	\$ 19.00
13 ✓	KL8	12	IBF I	FOOTPRINT,SURFACE,FLAT BRACKET	IBF I	\$ 9.00
14 ✓	KL8	12	IBF I	FOOTPRINT,SURFACE,FLAT BRACKET	IBF I	\$ 9.00
15 ✓	KL8	12	IBF I	FOOTPRINT,SURFACE,FLAT BRACKET	IBF I	\$ 9.00



To check these columns all you need to do is open the **Customize Columns** window.

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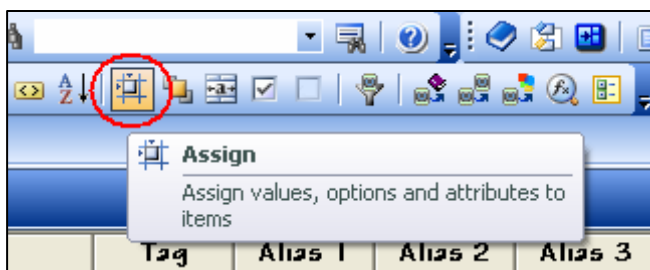


Then place a check mark in the box for each and select **OK**.

Additional columns to check would be **Building**, **Floor**, **Department** and **Person**.

Now, when I get back into my file I can see that there is an area tag included in the **Alias 1** column. Area tags can be very useful when it comes time to determine cost by area or during the plan check process, but they are not always necessary once it is time to submit an order. It is this information that is not allowing these like items to be combined together.

Item	Cat	Qty	Part Number	Part Description	Tag	Alias 1	Alias 2	Alias 3	List
7	KLØ	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,LEFT HAND	L	Steph's area			\$ 19.00
8	KLØ	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,LEFT HAND	L	Cheryl's area			\$ 19.00
9	KLØ	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,LEFT HAND	L	Don's area			\$ 19.00
10	KLØ	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,RIGHT HAND	R	Steph's area			\$ 19.00
11	KLØ	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,RIGHT HAND	R	Cheryl's area			\$ 19.00
12	KLØ	15	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,RIGHT HAND	R	Don's area			\$ 19.00
13	KLØ	12	IBF I	FOOTPRINT,SURFACE,FLAT BRACKET	IBF I	Steph's area			\$ 9.00
14	KLØ	12	IBF I	FOOTPRINT,SURFACE,FLAT BRACKET	IBF I	Cheryl's area			\$ 9.00
15	KLØ	12	IBF I	FOOTPRINT,SURFACE,FLAT BRACKET	IBF I	Don's area			\$ 9.00

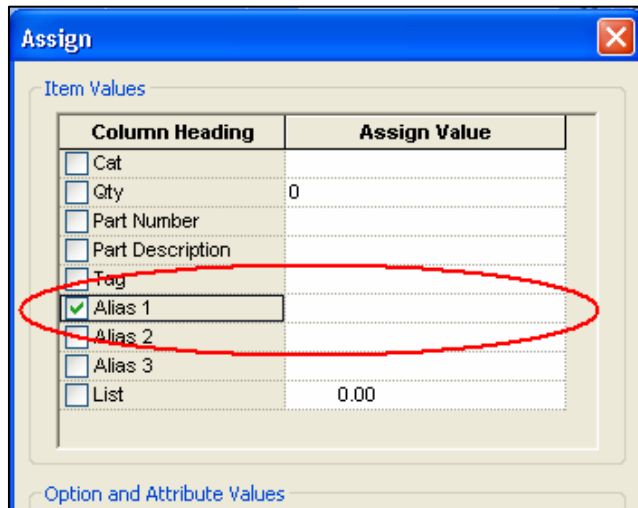


We will now walk thru the steps to remove this information and consolidate these items. As long as this information exists, these line items will not consolidate.

Step 1: Open the **Assign** window.

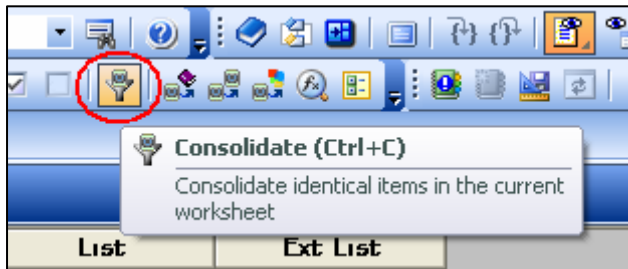
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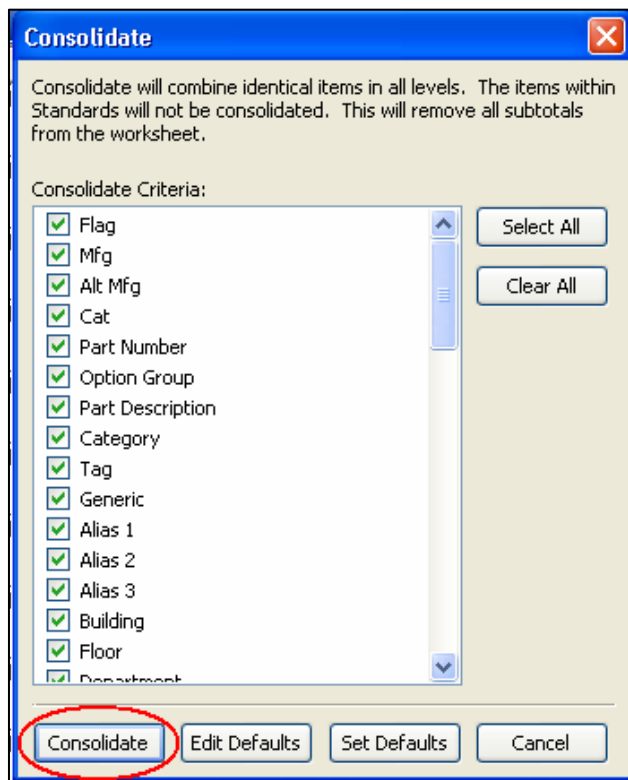


Step 2: Place a check mark in the **Alias 1** box and leave the **Assign Value** blank. Select the **OK** at the bottom of this window. This step completely removes all the values that existed in the Alias 1 column.

Since this column, as well as Alias 2 & Alias 3 is completely blank, I will go back into the **Customize Columns** window and remove the check mark from the boxes for each of these. There is no reason to keep them open and visible.



Step 3: Open the **Consolidate** window.



You may want to take note of two things before you perform the next step; the total list price for your file and the number of line items. In most cases the total list price should not change. The only time it may is if your file includes items that are sold in sets; i.e. Interworks EQ Side Rail End Caps which are sold in sets of 6. The number of line items will be reduced.

Step 4: Select the **Consolidate** button at the bottom of this window.

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Now, when I take a look at the three example items that are in my file they have all been combined. Before there were nine line items, now there are three. Remember our opening statement; would you prefer to handle nine boxes of product or three? And yes, even with the quantities for each of these items they can all be placed in one box.

Item	Cat	Qty	Part Number	Part Description	Tag	List	Ext List
3 ✓	KL8	45	IBRWSEL	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,LEFT HAND	L	\$ 19.00	\$ 855.00
4 ✓	KL8	45	IBRWSER	FOOTPRINT,INTERWORKS,SURFACE BRACKET,EDGE,RIGHT HAND	R	\$ 19.00	\$ 855.00
5 ✓	KL8	36	IBFI	FOOTPRINT,SURFACE,FLAT BRACKET	IBFI	\$ 9.00	\$ 324.00

Here are some additional product items that can be packaged in larger quantities:

- Top caps
- Wire way covers
- Connectors
- Finish channels
- Trim pieces
- Electrical harnesses
- Electrical jumpers
- Duplexes
- Lock cores
- Brackets