

The Cheat Sheet Explorer

Paste your Cheat Sheet in, get merge tokens out

ABOUT THIS GUIDE

This is the companion to the Find it fast in the Cheat Sheet guide. Instead of searching the Cheat Sheet by hand, you paste it into one workbook and it hands you the token to drop into your quote template, with the value it holds on that shed sitting beside it so you can see you have the right one. It is an ordinary Excel file: no macros, no add-ins, and nothing in it is sent anywhere. We put it together from our experience and customer feedback, as a starting point.

Set it up once

1. Save the workbook somewhere you will find it again, next to your quote templates.
2. In Instant Quoting, go to **Reports** and **Generate Cheat Sheet**. Use a shed that has every option you sell on it, so nothing is missing from the list.
3. Open the CSV, select everything and copy.
4. In the workbook, open the **Paste export here** tab, click cell **A2** and paste. That overwrites the two example rows.

THAT'S THE WHOLE SETUP

Everything else in the workbook reads from that one tab. When your shed or your pricing changes, generate a fresh Cheat Sheet and paste it over the top.

The three tabs

TAB	USE IT WHEN	WHAT YOU GET
Quote fields	You want the usual things: customer, site, prices, sizes, colours, steel sizes	Around 80 fields already written out, each with its token and, once you have pasted, the value from your own shed
Find a field	You want something specific, or something that depends on the shed	The first 20 matches, each with its token ready to copy
Quick views	You want to see every match, not the first 20	The searches worth knowing, and how to filter the full list

Two ways to search

By name

On the **Find a field** tab, leave *Search in* on **Names** and either type part of a name or pick one of the ready-made searches from the dropdown. **Colour** brings back every colour on the shed. **framings** brings back the steel sizes.

By value, which is usually faster

Set *Search in* to **Values** and type something you can already see on screen. If the designer shows a roof colour of *Dune*, searching `Dune` brings back `Shed.RoofColour`, and the token beside it is the one you want. You never have to guess what a field might be called.

READING THE RESULTS

Variable name is what ShedMate calls it. **Value on your shed** is what it holds right now, which is how you confirm you have the right line. **Merge token** is the bit you copy.

Getting a token onto the quote

- 1. Copy the cell in the **Merge token** column. **Don't retype it.** One wrong capital and the field prints blank, with no error.
- 2. Paste it into your Word template where you want the value to appear.
- 3. Upload the template under **Settings, Templates, Quoting**, then reload your draft so it appears in the list.
- 4. Generate the document and check the field filled in.

THREE THINGS THAT CATCH PEOPLE OUT

Prices print plain. You get 41546.35, with no dollar sign and no commas. Type the \$ into your template.

Never put a fallback on a price. A fallback fires whenever a field comes back empty, including when the name is wrong, so a mistyped price line would print your fallback text and still look finished.

The sheet only knows this shed. If the shed has no PA doors, there are no PA door lines to find. That is why the test shed should have everything on it.

When a field says something instead of a value

WHAT YOU SEE	WHAT IT MEANS	WHAT TO DO
<code>not in this export</code>	That name is not in the Cheat Sheet you pasted	Either the shed does not have that item, or your account calls it something else. Search for it on the Find a field tab.
<code>nothing entered on this quote</code>	The field exists but is empty, for example Inclusions you have not typed yet	Nothing to fix. It will print once you fill it in on the quote.
<code>(blank)</code>	Same thing, shown in the search results	Nothing to fix.
Everything is empty	Nothing has been pasted yet	Go back to the Paste export here tab and paste your Cheat Sheet at cell A2.

NEXT STEP

Keep one Cheat Sheet from a shed that has every option on it, and keep this workbook beside your templates. Between them you can answer any "what is this field called?" question in about ten seconds, without asking anyone. If a value you need is not in the sheet at all, send us the Cheat Sheet and what you are trying to show on the quote at support@shedmate.com.au.