

Creating Custom Schedules

Reference Number: **KB-03120**

Last Modified: **June 8, 2023**

The information in this article applies to:



QUESTION


How do I create a completely custom schedule and specify what objects are included in that schedule?

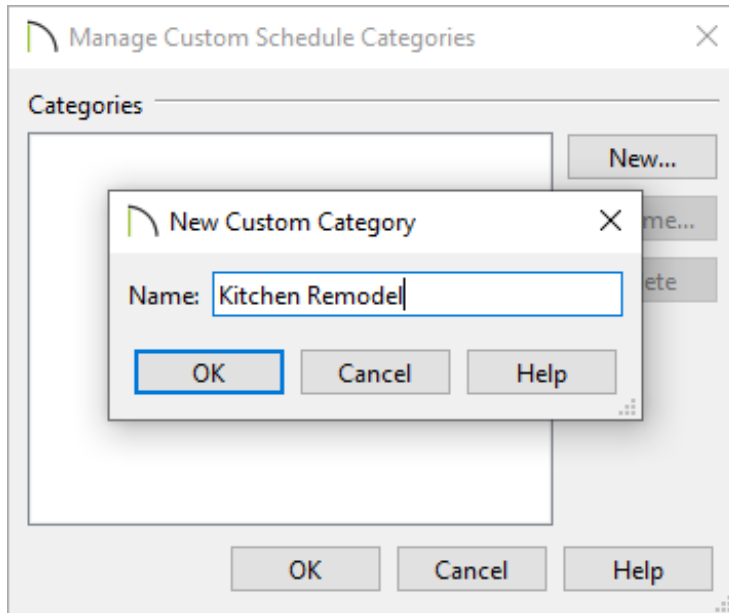
ANSWER

Use custom categories along with the Custom Schedule tool to create a completely custom schedule that can consist of multiple objects of different types. For example, you can combine specific cabinets, fixtures, and other objects into a single custom schedule, such as in the event that you're doing a kitchen remodel.

- [Creating or managing custom categories](#)
- [Adding objects to a category](#)
- [Creating a custom schedule](#)

Creating or managing custom categories


1. Navigate to **Tools> Schedules> Manage Custom Categories**  .
2. In the **Manage Custom Schedule Categories** dialog that displays, click the **New** button and provide an appropriate name for the category. In this example, "Kitchen Remodel" is specified.



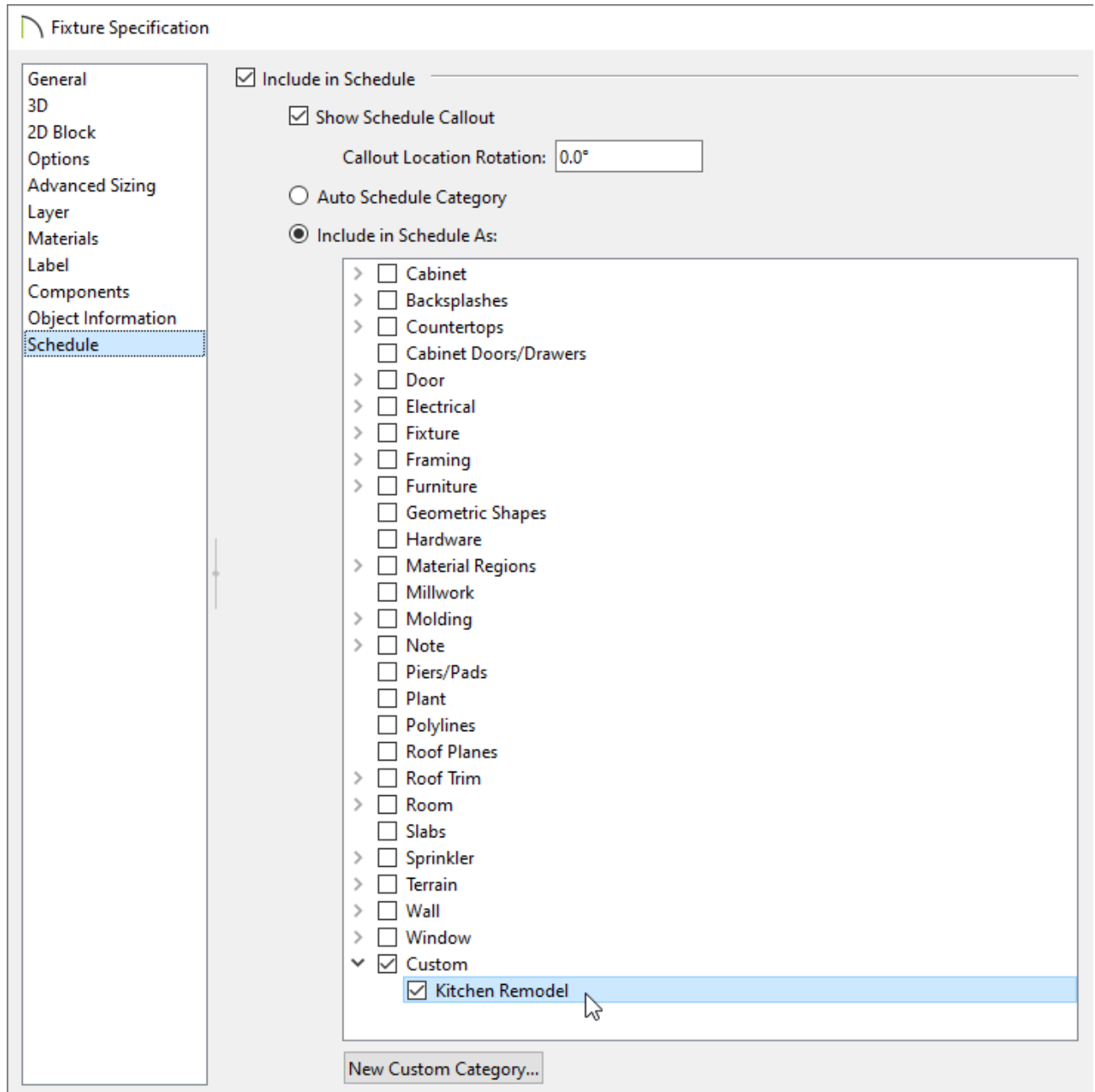
- You can also manage any custom categories that have been created.
- Click on a category and select **Rename** to give it a new name, or **Delete** to delete it from the plan.

If objects are assigned to display in a custom category, and the custom category is then deleted, the object may no longer appear in any type of schedule until you open the object and assign it to display in a new category. Please see the next section on [Adding objects to a category](#) to learn more.

Adding objects to a category

1. Click on an object that you would like to be apart of a custom category, then click on the **Open Object**  edit button.

2. In the **Specification** dialog that displays, click on the **SCHEDULE** panel, select the **Include in Schedule As** radio button at the top, then place a check in your desired custom category.





Objects can be assigned to display in multiple different categories. For example, a single cabinet object can be set to be displayed in the Cabinet category, as well as a Custom category. This allows a single object to appear in multiple schedules at once.



3. Perform this same procedure for any and all objects that you would like to be

associated with this category.

Creating a Custom Schedule

1. Navigate to **Tools> Schedules> Custom Schedule**  and click to place a schedule in your desired location.

We highly recommend creating schedules within the separate Schedules Detail window. This window can be located and opened by accessing the **Project Browser**  and expanding the CAD Details folder, or by navigating to **CAD> CAD Detail Management** .

2. Once placed, select the schedule using the **Select Objects**  tool, then click the **Open Object**  edit button.
3. On the **GENERAL** panel of the **Schedule Specification** dialog that displays:

Schedule Specification

General

Main Title: ☒ Display

Include Options

☒ Include Objects from All Floors

Include Objects from Floor:

Include Objects from Room:

Categories to Include:

- ☐ Room
- ☐ Slabs
- ☐ Sprinkler
- ☐ Terrain
- ☐ Wall
- ☐ Window
- ☒ Custom
 - ☒ Kitchen Remodel

Columns

☒ Display Column Headings in Schedule

☒ Limit List to Included Categories

Available Columns:

- 2D Symbol
- 3D Elevation
- 3D Exterior Elevation
- 3D Interior Elevation
- 3D Perspective
- Accessories/Inserts
- Age at Maturity
- Arch

Columns to Include:

- Number
- Label
- Qty
- Floor
- Description

Rows

☒ Group Similar Objects ☐ Automatically Sort by:

☐ Display Totals Row ☐ Swap Rows/Columns

Minimum Rows:

Object Preview Options

☒ Show Color ☐ Show Opening Indicators

☒ From Plan ☐ From Schedule ☒ Show Casing, Lintel, Sill

☐ Scale Images ☐ Show Treatments, Shutters

☐ Use Plan View Scale

- Specify the **Main Title** for the schedule.
- Pick and choose what categories you would like to include in the schedule.

In this example, we chose the "Kitchen Remodel" custom category that was created earlier in the article.

- Choose the Columns that you would like to be included in the schedule.
- If desired, check the **Swap Rows/Columns** box to swap the position of column

headings with row headings.

- Make any other desired adjustments to the Display and Object Preview Options. For more information on these options, click the **Help** button at the bottom of the dialog to open your program's documentation.


4. Navigate to the **MAIN**, **TITLE**, and **HEADER TEXT STYLE** panels to change the text properties associated with the schedule.

In legacy versions, only the **TEXT STYLE** panel is available, which affects all text within the schedule.

5. Make any additional adjustments, such as to the **LABELS** or **FILL STYLE**, then click **OK**.
6. Any objects that were assigned to display in the custom category will now display in the schedule.

KITCHEN REMODEL SCHEDULE				
NUMBER	LABEL	QTY	FLOOR	DESCRIPTION
G01	R36"	1	1	DOUBLE DOOR REFRIGERATOR 1
G02	B48	1	1	BASE CABINET
G03	B24R	1	1	BASE CABINET
G04	DUPLEX	3	1	DUPLEX

Related Articles

 [Creating a Plumbing, HVAC, or Appliance Schedule \(/support/article/KB-00929/creating-a-plumbing-hvac-or-appliance-schedule.html\)](/support/article/KB-00929/creating-a-plumbing-hvac-or-appliance-schedule.html)



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