

BuilderTREND

Integration Plugin

User Guide

UPDATED ON 6/26/2018

PlanSwift

Authored by: Dave Hansen



Table of Contents

Overview	3
Purchasing and Installation	4
Purchasing Plugins.....	4
Installation and Uninstallation	4
Features.....	5
How To	5
How to: Export PlanSwift Estimating Data to Excel Files Formatted for BuilderTREND.....	5
FAQ.....	9

Overview

This guide will teach you how to properly use the tools and features found within the BuilderTREND Integration Plugin. This plugin is designed for use with PlanSwift® Takeoff and Estimating Software. This guide is not meant to be a step-by-step “walk through” document, although it can be used as a reference for getting the work done. If you encounter technical difficulty, consult this guide (including the [FAQ](#) section of this user manual) or contact the technical support department at:

PlanSwift® Technical Support
support@PlanSwift.com
1-888-752-6794 ext. 2

PlanSwift also offers additional training. For training options, contact the training department at:

PlanSwift® Training Department
training@PlanSwift.com
1-888-752-6794 ext. 6

Purchasing and Installation

Purchasing Plugins

If you need to purchase PlanSwift or a plugin product, contact the Sales Department at:

PlanSwift® Sales
sales@PlanSwift.com
1-888-752-6794 Ext. 1

Installation and Uninstallation

Installing and uninstalling plugins is simple. For installing them, click on the Import Plugin Package icon (arrow 1 in Figure 1) from the PlanSwift Main Ribbon-bar **Plugin** tab (arrow 3 of Figure 1) and follow the prompts from there. For uninstalling, click on the **Uninstall Plugin** (arrow 2 in Figure 1) and follow those prompts.

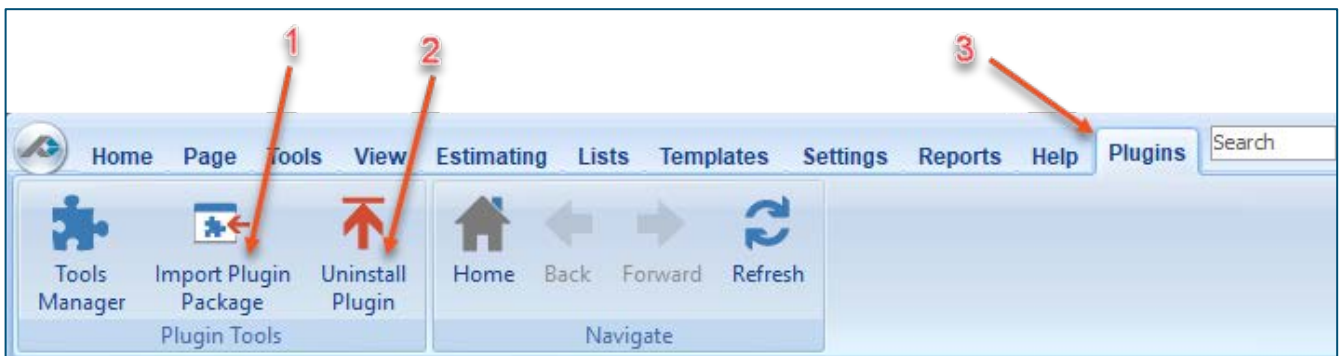


Figure 1

Features

The BuilderTREND Integration Plugin permits PlanSwift estimating information to be exported to an Excel format that can then be imported into BuilderTREND software. After the plugin is installed, the **BuilderTREND** icon will appear in the **BuilderTREND** group on **Estimating** ribbon-bar tab (see Figure 2). The instructions below will guide new users through the export process. We highly recommend purchasing a training package for accelerated learning and faster customization.



Figure 2

How To

How to: Export PlanSwift Estimating Data to Excel Files Formatted for BuilderTREND

To export estimating data to an Excel file compatible with BuilderTREND, click on the **Estimating** tab on the PlanSwift ribbon-bar and then, in the **Estimating Layouts** window, click on the estimating data you wish to export (see Figure 3).

Home Page Tools View Estimating Lists Templates Settings Reports Help Plugins Search Undo

New Folder New Item New Area New Linear New Segment New Count New Assembly New Part New From Type Delete Print Columns Filter Refresh Properties Expand Collapse Export To Excel Import Template

Estimate

Estimating Layouts PlanSwift Layouts\Basic Layout

Name	Description	Qty	Units	Cost Each	Cost Total	Markup %	Price Each	Price Total	Color
Slab on Grade	Slab on Grade	204.18	SQ FT	\$0.00	0.00	0	\$0.00	\$0.00	
Concrete Slab (priced per CU YD)	4" Thick, 4000 PSI	3	CU YD	\$150.00	\$450.00	0	\$150.00	\$450.00	
#4 Rebar (priced per LBS)	#4 Rebar, 0.668 LBS/FT	171	LBS	\$0.80	\$136.80	0	\$0.80	\$136.80	
1" Gravel (priced by Tons)	6" Thick, Weight 3800 LBS/CU YD	7.18	Tons	\$80.00	\$574.40	0	\$80.00	\$574.40	
15 mil Vapor Barrier (priced per Roll)	20' x 100' roll, High Performance Polyethylene	0.05	Roll(s)	\$74.00	\$3.70	0	\$74.00	\$3.70	
Concrete Labor (priced per SQ FT)	Pour, Smooth and Finish	204.18	SQ FT	\$4.00	\$816.72	0	\$4.00	\$816.72	
Rebar Labor (priced per Hour)	Tie, Bend and Set	0.68	Hours	\$52.00	\$35.36	0	\$52.00	\$35.36	
Section		204.18	SQ FT						
Exterior Trim	Drip Edge	109.9	FT	\$0.00	0.00	0	\$0.00	\$0.00	
Section		81.17	FT						
Section		14.46	FT						
Section		3.25	FT						
Section		7.35	FT						
Section		3.67	FT						
Exterior Rock	River Rock	264.91	SQ FT	\$0.00	0.00	0	\$0.00	\$0.00	
Section		264.91	SQ FT						
Exterior Siding	Vinyl Siding	409.35	SQ FT	\$0.00	0.00	0	\$0.00	\$0.00	
Section		70.81	SQ FT						
Section		338.55	SQ FT						
BR-231	Floor Tile	276.14	SQ FT	\$0.00	0.00	0	\$0.00	\$0.00	
Game Room	Drywall Ceiling	627.59	SQ FT	\$0.00	0.00	0	\$0.00	\$0.00	
Offices	2x4 Acoustical Ceiling Tile	322.74	SQ FT	\$0.00	0.00	0	\$0.00	\$0.00	
Section		135.92	SQ FT						
Section		186.82	SQ FT						
Interior Doors	Solid Core	14	EA	\$0.00	0.00	0	\$0.00	\$0.00	
Section		14	EA						
Conference Room	Carpet	505.54	SQ FT	\$0.00	0.00	0	\$0.00	\$0.00	
Section		505.54	SQ FT						
Exterior Walls	Typical Wood Framed Wall	266.08	FT	\$0.00	0.00	0	\$0.00	\$0.00	
Section		266.08	FT						
Interior Walls	Typical Metal Framed Wall	294.37	FT	\$0.00	0.00	0	\$0.00	\$0.00	
Section		49.53	FT						
Section		20.18	FT						
Section		17.89	FT						
Section		63.54	FT						
Section		13.53	FT						
Section		13.61	FT						
Section		40.41	FT						
Section		16.54	FT						
Section		30.39	FT						
Section		18.31	FT						
Section		5.3	FT						
Section		5.17	FT						
Common Room	Hardwood Flooring	696.43	SQ FT	\$0.00	0.00	0	\$0.00	\$0.00	
Section		696.43	SQ FT						

Figure 3

Next click on the **BuilderTREND** icon. This will automatically open Excel and export the data to a format compatible with BuilderTREND (see Figure 4).

The screenshot shows an Excel spreadsheet titled "Excel Export to BuilderTREND.xlsx - Saving...". The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Help, and ACROBAT. The Home ribbon is active, showing Font, Alignment, and Number groups. The active cell is A21, containing the formula =MF-201E. The spreadsheet data is as follows:

	A	B	C	D	E
1	Accounting Code	Description	Quantity	Unit Price	Amount
2	67-999	Slab on Grade	204.18	0	0
3	A291	4" Thick 4000 PSI	3	150	450
4	421-A23	#4 Rebar, 0.668 LBS/FT	171	0.8	136.8
5	1C54-2	6" Thick, Weight 3800 LBS/CUYD	7.18	80	574.4
6	92C53-A	20' x 100' roll, High Performance Polyethylene	0.05	74	3.7
7	AA5C2	Pour, Smooth and Finish	204.18	4	816.72
8	TZ-548	Tie, Bend and Set	0.68	52	35.36
9	67891	Drip Edge	109.9	0	0
10	91-flatrock	River Rock	264.91	0	0
11	V23-white	Vinyl Siding	409.36	0	0
12	GR-102	Floor Tile	276.14	0	0
13					
14					
15	12-WSH	Drywall Ceiling	627.59	0	0
16					
17	98A4-2	2x4 Accoustical Ceiling Tile	322.74	0	0
18	98-D2	Solid Core	14	0	0
19	ACD-E58	Carpet	505.54	0	0
20	W-185	Typical Wood Framed Wall	266.08	0	0
21	MF-201E	Typical Metal Framed Wall	294.37	0	0
22	HW-91D7	Hardwood Flooring	696.43	0	0

Figure 4

Save the Excel file to a filename and location of your choice, and it is then ready to be imported into BuilderTREND.

The table below shows the relationship between PlanSwift data in the Advanced Properties window and exported Excel BuilderTREND data:

PlanSwift/BuilderTREND Data Correlation

PlanSwift	BuilderTREND
Item #	Accounting Code
Description	Description
Qty	Quantity
Cost Each	Unit Price
Cost Total	Amount

Figure 5 shows a diagram of the data correlation between PlanSwift's advanced properties screen for the Concrete Slab entry and the exported Excel BuilderTREND file.

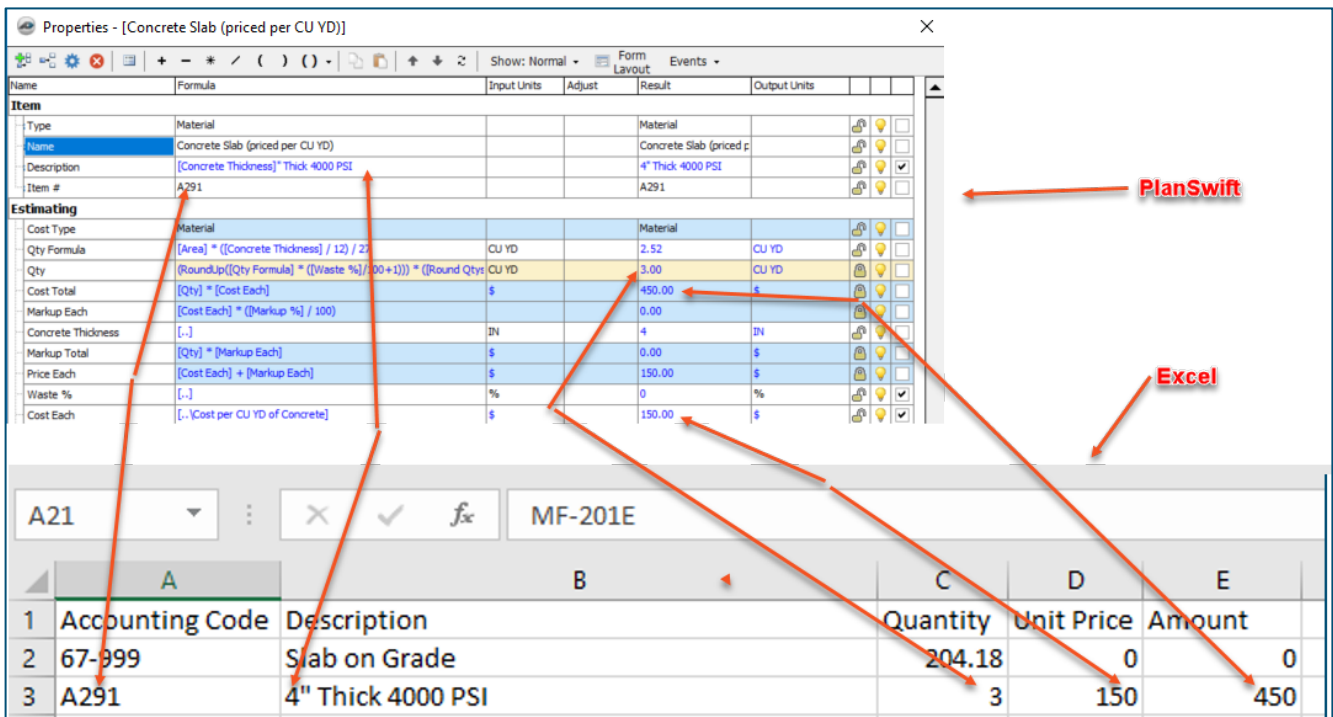


Figure 5

Disclaimer

Data exported to BuilderTREND should always be tested and verified by the user to ensure that the data is exported correctly. PlanSwift cannot verify the accuracy of data exported by the user.

FAQ

Question: I've read this user guide, and I still have questions. What do I do?

Answer: PlanSwift recommends that you purchase a training package. We highly recommend new users purchase a training package, because training is customized to each user. We offer [one-on-one training](#) and [classroom training](#). Contact training@PlanSwift.com or at 1-888-752-6794 Ext. 6.

Question: Can I export Folders in the Estimating Tab using the BuilderTREND Integration?

Answer: No. BuilderTREND does not export folder items from PlanSwift.