BuilderTREND

Integration Plugin

User Guide

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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. 4

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.
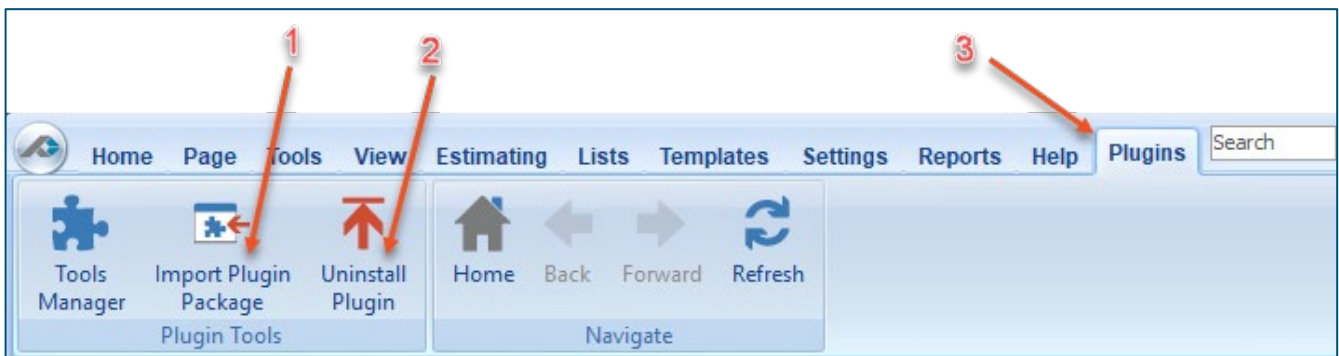
Figure 1

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).

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).

	Accounting Code	Description	Quantity	Unit Price	Amount
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.
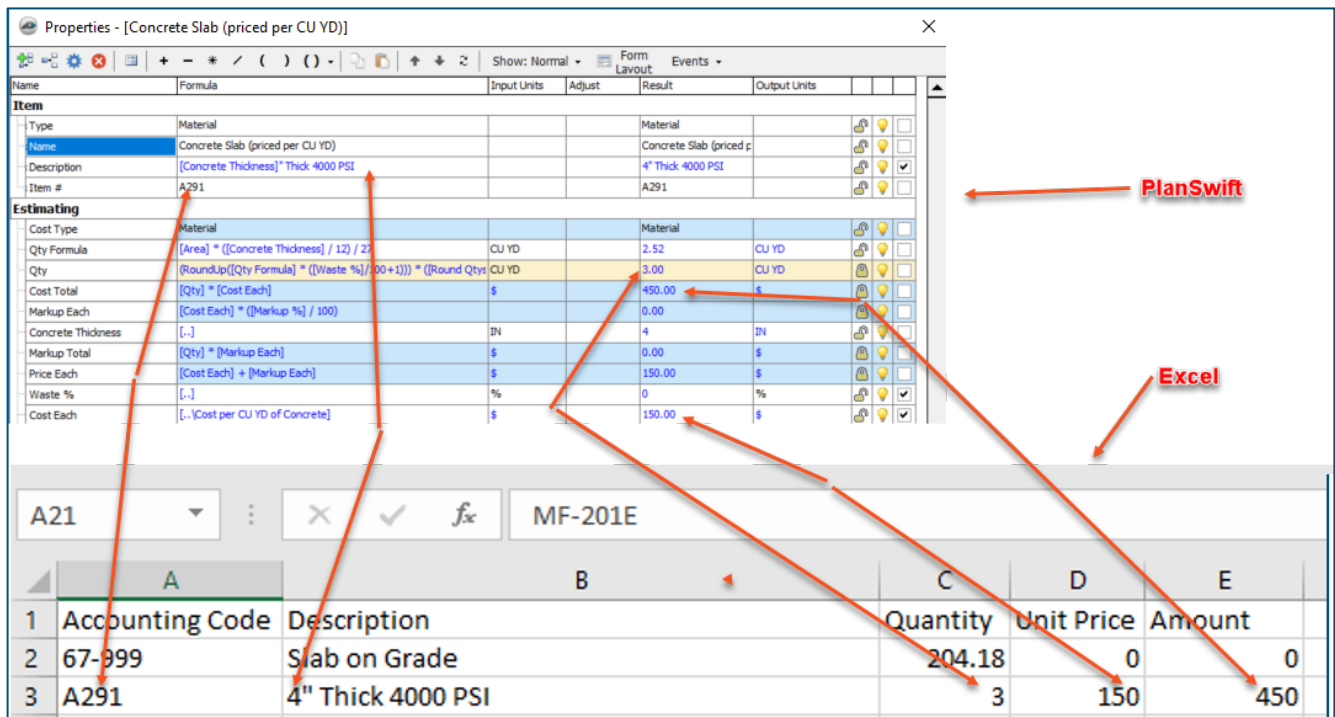

Figure 5

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. 4.

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

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